

# Real-time Generation

2011 Survey



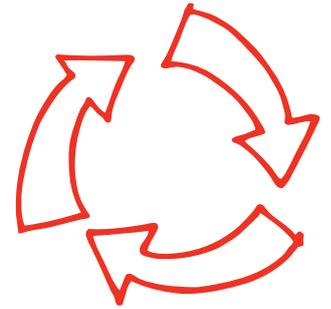
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A e g n B

# Introduction

The 2011 Logicalis Real-time Generation Survey reflects big changes in education and the economy.



Over the past 12 months, two trends in education have emerged. The first is fierce opposition to increased Higher Education (HE) fees – to the extent that protesters took to the streets last winter. The second is new records of achievement in GCSE and A-level examinations. Together these trends reflect a growing problem: more teenagers are now qualified for and interested in HE; but fewer are willing or able to pay for it.

The demand for HE grows year on year – but it conflicts with a similar increase in student fees. In the Real-time Generation Survey, the link to wider issues with the economy become clear. Throughout the summer of 2011, we asked over 1,000 13 to 17 year-olds what they thought about HE. Their responses reveal why increased HE fees are being met with such obvious discontent.

Of those teenagers who responded, only 25% feel that £9,000 is a 'fair' amount to pay for higher education. Indeed, 83% think fees should be below £3,000 per term.

It might surprise some University Vice Chancellors and politicians to learn that many 13 to 17 year-olds simply don't believe their time at university would give 'good value for money'. In fact, 31% of our respondents said it definitely wouldn't. For another 34%, university fees wouldn't represent good value – but it's a price they would be prepared to pay.

65% of our future HE students believe they will pay too much for a service that doesn't deliver value for money. And they haven't even finished secondary school.

What should hearten the HE establishment more is that 13 to 17 year-olds believe the university learning experience now matches its social attractions. Getting a degree counts. Instead of moving away to attend university, 50% of our respondents would prefer to study remotely from home.

Another related point is the so-called 'speed' degree. 75% of students want shorter degree courses to help cut the costs of studying. This shift, together with the increase in remote student access, could mark the biggest change in the structure and provision of HE in the UK since the 1980s.

Today's students don't want to spend up to four years in a city they don't know, paying for a degree they can't afford, and whose quality and experience won't amount to value for money. The state of HE and the economy are interlinked – this real-time generation is disillusioned by our current times of austerity.

The question is: what should politicians and sector leaders do? Should they reform an entire system on the basis of what could prove an economic blip? Or is the provision of HE systemically unfit for purpose and in dire need of change?

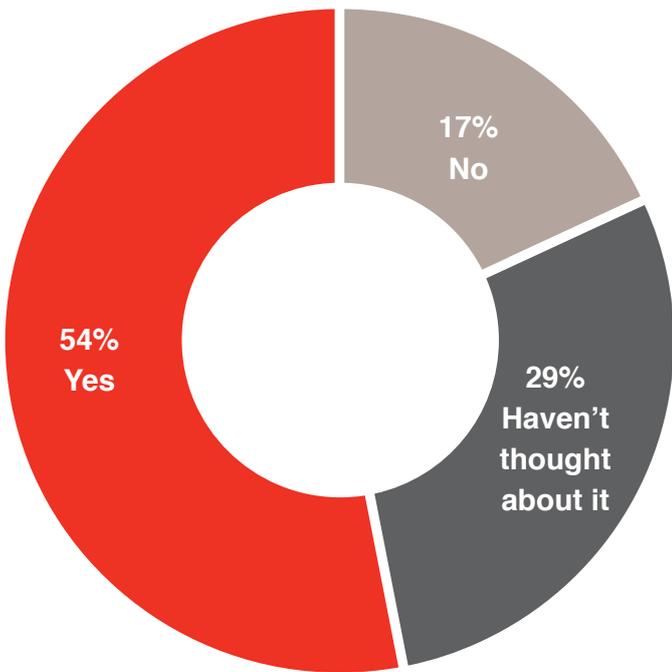
*"It might surprise some University Vice Chancellors and politicians to learn that many 13-17 year-olds simply don't believe their time at university would give 'good value for money'. And they haven't even finished secondary school."*

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\*Real-time Generation Survey conducted by ClubD:TV among 1,029 children aged between 13 and 17 years old in July 2011.)

# A degree at half the price, in half the time

If students could study a degree in half the time – and pay half the price – would that encourage university attendance?

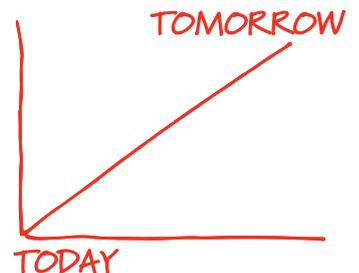


If students could study a degree in half the time – and pay half the price – would that encourage university attendance?

Compared with their pre-2007 counterparts, the real-time generation of students are studying in a different world. HE fees are increasing. Disposable income is dropping. And the prospect of spending three years incurring debts – with a limited budget for socialising – is unattractive. Could we be shifting to a need and demand for the 'speed degree'?

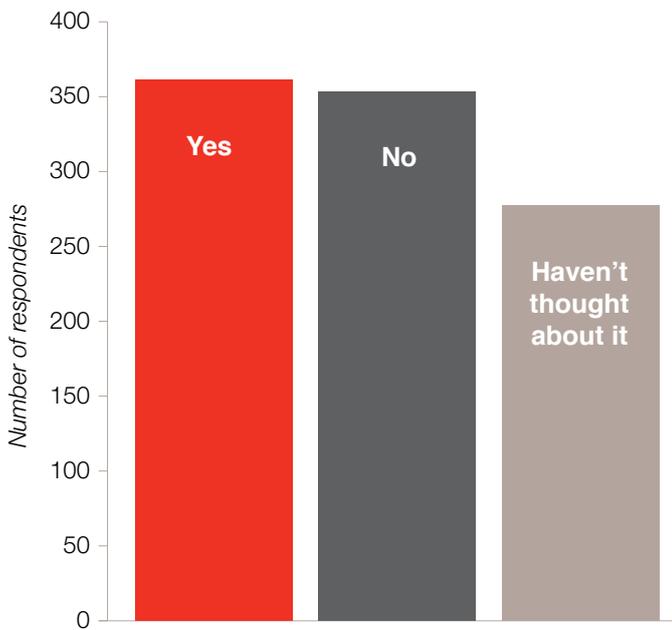
For today's students, leisure and social activities could soon become a costly waste of time. 13 to 17 year-olds are often told that a degree is the key to earning more – or even the only path to decent employment. Will they want a more pragmatic and functional approach to the HE experience? After all, you need a licence to drive a car – but you don't expect to make friends while learning how.

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# Going to university by studying at home

If students could study from home to reduce the cost of gaining a degree, would they give up the social aspect of university?



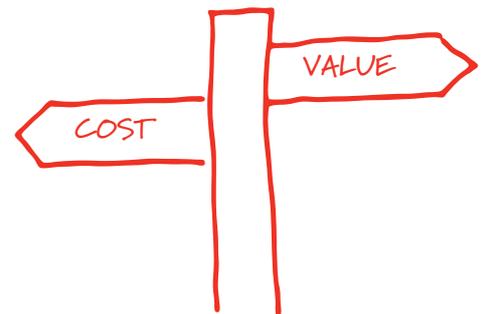
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Modern living doesn't come cheap. And the high costs of HE are persuading the next generation to study closer to home. Why leave your bedroom when the Internet can bring your university to your laptop? With fees rising to £9,000 a year and inflation sitting close to 5%, today's students have the lowest disposable income of any for decades, which could transform the UK into a truly 'open' university.

The real-time generation can't afford to socialise, and is understandably cautious about leaving university with big debts. Living with Mum and Dad – at the expense of forming new friendships and experiences – is a sensible, if unexciting, alternative.

While universities could quickly switch to distance study, this would have a real impact on local businesses and communities. The economic eco-system of university towns would change dramatically if more students opt to learn remotely. Will local retailers be more interested in student satisfaction surveys than Vice Chancellors in coming years?

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# £9000: the yearly price of learning

From September 2011, university tuition fees will rise to £9,000 per year. Is this a fair price to pay?

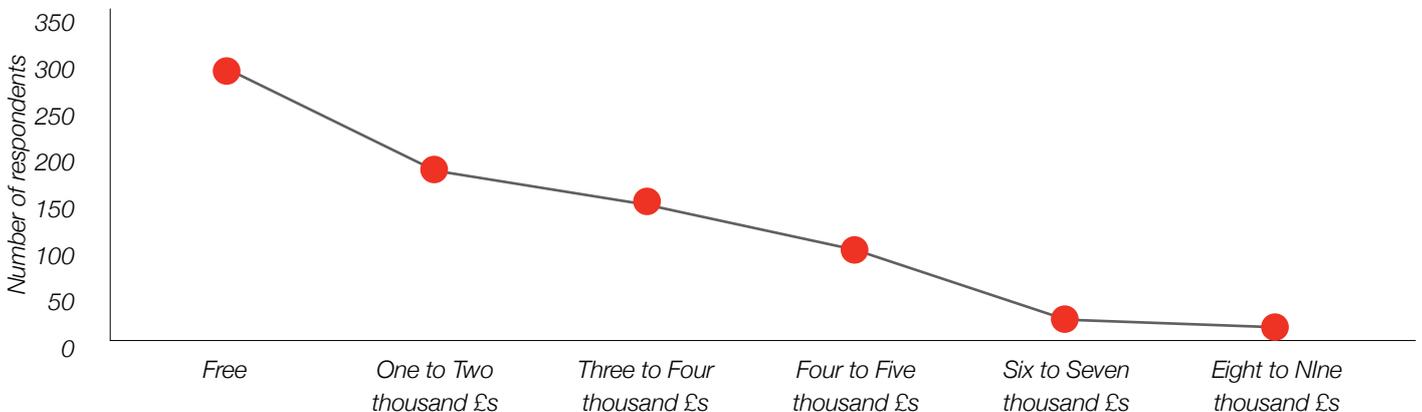
For 75% of our Real-time Generation Survey respondents, £9000 a year is not a 'fair' amount to pay for the privilege of a university education. And who can blame them? Every generation bemoans what it perceives to be unfair treatment. But how many 13 to 17 year-olds could imagine paying £9,000 for anything? The question is: what do they want to pay?



More than 83% of the teens we questioned believe fees should be less than £3,000 per year. While 39% feel tuition should be free. Perhaps the government should have started fees at £3,000 with a sliding-scale increase – depending on economic circumstances.

Ignoring the upfront costs of a university degree, will the real-time generation see its long-term value?

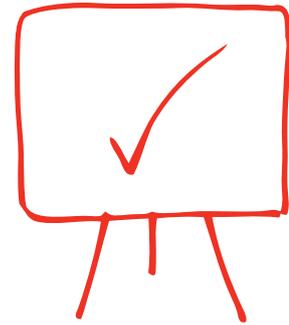
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# Estimating the value of education

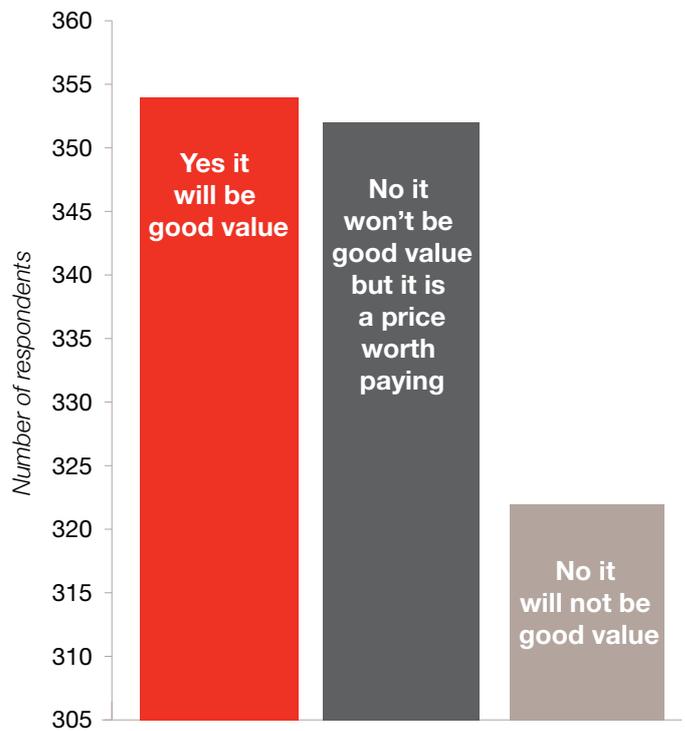
Do students think they're going to get value for money from university, or do they think a degree is a price worth paying?



A degree is an investment for the future. Figures from the Office for National Statistics show that graduates earned an average of £12,000 a year more than non-graduates over the past decade.

Do 13 to 17 year-olds know this – or are students not as materially-driven as we think? Less than a third of students believe their time at university will deliver 'value for money'. Perhaps politicians should focus on 'value for money' ratings instead of lifetime earning potential. The real-time generation is more aware of the concept than it's given credit for.

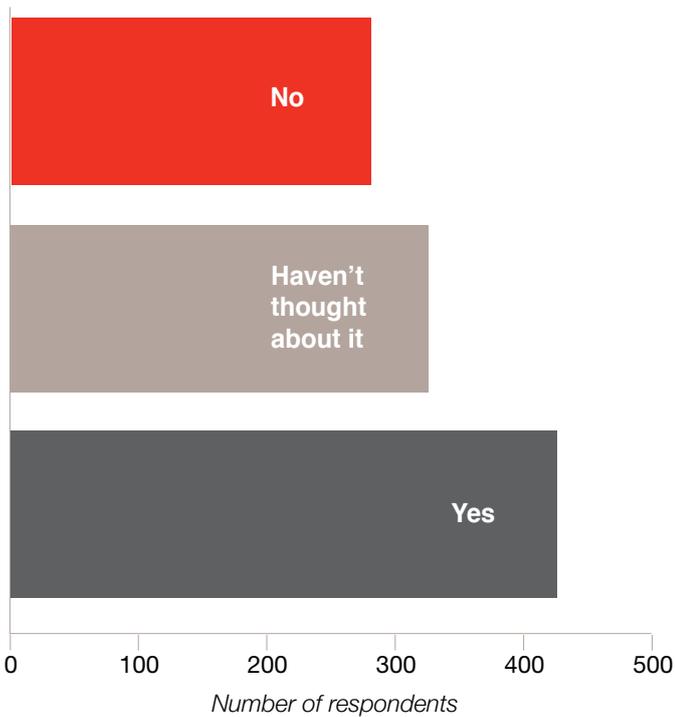
*"The average graduate will earn £12,000 a year more than a less-qualified peer. Do 13 to 17 year-olds know this?"*



*Do students think they're going to get value for money from university, or do they think a degree is a price worth paying?*

# The payback of HE fees

Have increased tuition fees deterred students from going to university, or are they happy to pay them back as they earn in the future?



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The real-time generation is being hit hard by the need to pay back HE tuition fees. And the effects are starting to show: 41% of our survey respondents admitted that fees were a deterrent factor in deciding whether or not attend university.

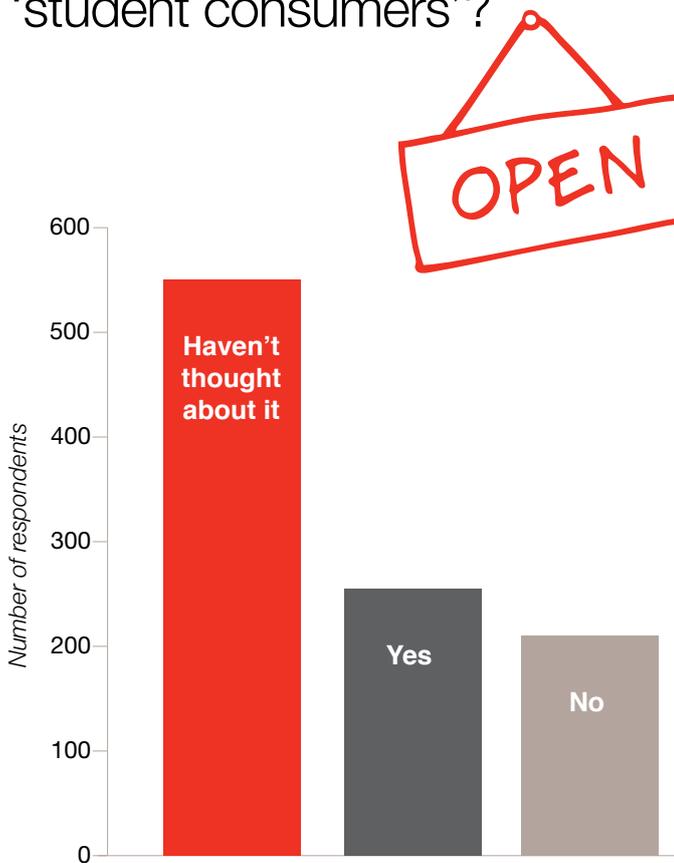
It's not clear whether these decisions are being made on purely financial grounds. But if students expect poor value for money from their university experiences – and they can't access the shorter degrees they now say they want – then annual fees of £9,000 could be the tipping point. Indeed, only 26% said cost wouldn't be a deterrent.

The reality is that 74% of students are now evaluating whether the price of an education is actually worth paying. The payback of requiring British students to pay their fees back could be lower attendance rates in the future. HE in the UK is fast becoming a luxury that few can afford. How will this help our country compete against emerging nations, where building a new university is as important as building a new factory?

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# Entering the era of the student-consumer

If paying for Higher Education, do students consider themselves 'student consumers'?



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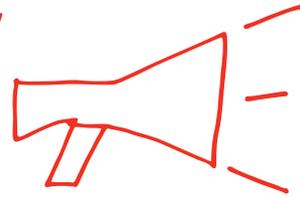
For the real-time generation of students, HE tuition fees bring with them an expectation of consistent quality, and an increase in student rights. Are we entering the era of the student-consumer? Certainly, not all 13 to 17 year-olds see themselves as such: 54% of our respondents hadn't even given the proposition any thought. But how long before they do?

After all, 55% of those we questioned had considered their new consumer power. Will students soon want a 30-day, no-quibble returns policy on their choice of HE institution? It's worth remembering the old adage: the customer is always right. What implications will this have on the future provision of HE?

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# Complaints: the rise of a new institution in HE

Will fee-paying students be more likely to complain about poor service at university, than if they were not paying for it?

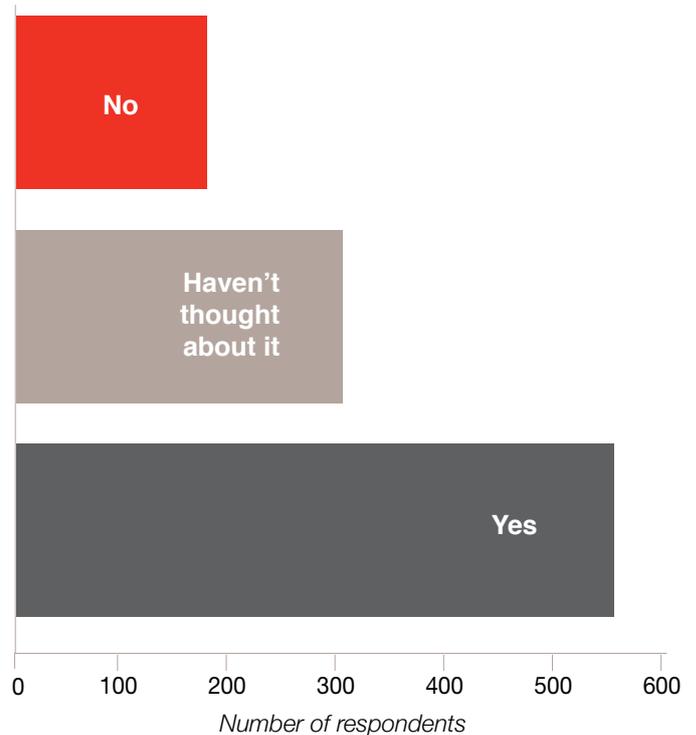


It's a commonly held view that the British are good at queuing, and bad at complaining. At the average UK university, the queue at the complaints desk might well remain orderly, but it's likely to get longer if today's students feel they're being poorly served.

75% of our survey respondents said they would now be more likely to complain about their HE experiences because they're paying for them. A real-time generation wants and needs a real-time approach.

Advances in communication technologies are giving universities more responsive mechanisms to send, receive and act on student feedback, by providing insight into how institutions are performing in real-time. And it's not just students' judgements that count: ensuring parental expectations are being met is important – especially if they're the ones footing the bill.

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# Learning through technology

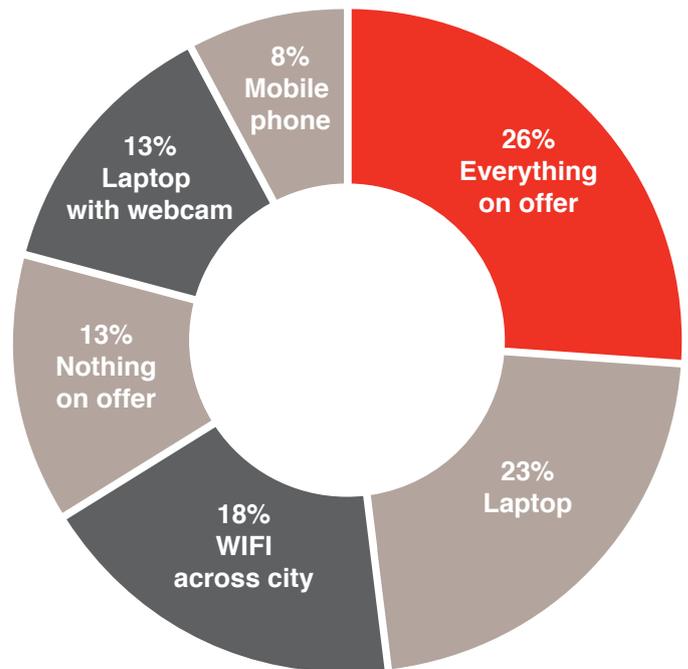


If students have to pay to go to university, what do they think should be included in the price?

Throughout the last decade, the market for all-inclusive holidays has soared. And when those travellers head for the airport, they want to know their two weeks are fully paid – with no hidden charges added on. The UK's HE institutions are fortunate that our 13 to 17 year-olds don't know what it was like to fly without paying for extras like luggage. However, it seems today's students aren't afraid to ask universities for 'freebies' as part of their increased fees.

23% of students want a free laptop to be included. A further 13% want laptops with built-in webcams, so they can connect with family and friends. And another 18% want free access to WiFi – wherever they are. Tellingly, 26% of those questioned wanted everything on offer.

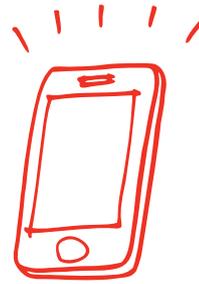
Given the current costs of tuition, £1,000 worth of 'free' kit might not be such an unreasonable request in return for fees paid at £9,000 a year – especially considering the role of technology in the learning experience.



*If students have to pay to go to university, what do they think should be included in the price?*

*“However, it seems today's students aren't afraid to ask universities for 'freebies' as part of their increased fees.”*

# Mobility matters

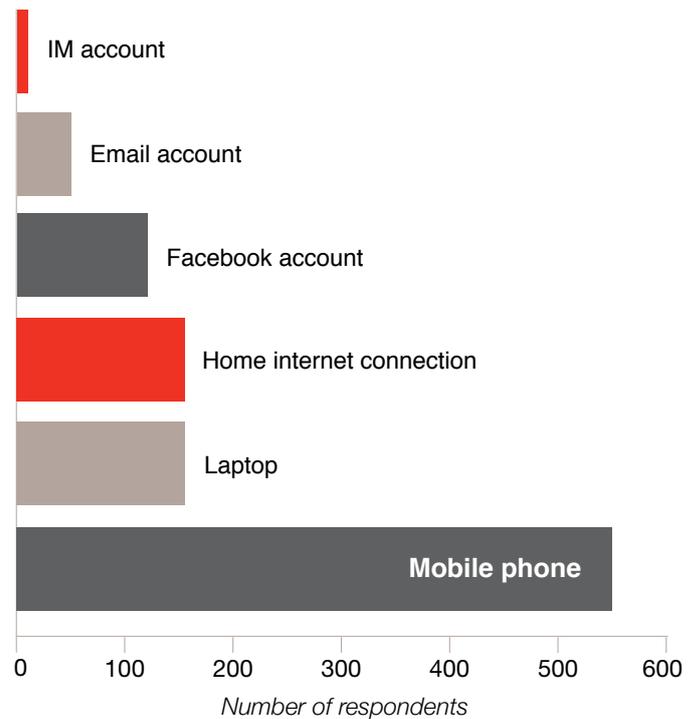


## What's the one technology 13 to 17 year-olds can't live without?

The Real-time Generation Survey wouldn't have been complete without asking: what's the one technology 13 to 17 year-olds can't live without? The answer was unanimous – and focused less on applications, and more on a device.

Only 11% of respondents said they couldn't function without Facebook – other social networking sites didn't register. Only 2% reported potentially losing sleep over no access to Instant Messaging. Email isn't dead – but for this generation, it never really got going: a mere 5% would miss their inboxes filled with messages sent over a second ago.

The one thing the youth of today can't contemplate life without is the device that defines the real-time generation: the mobile phone. It's the 21st century equivalent of a comfort blanket. Any thoughts of losing it had 54% of respondents 'sucking their thumbs' in worry. But the name's a misnomer – very few of today's teens use their mobile phones to make calls.

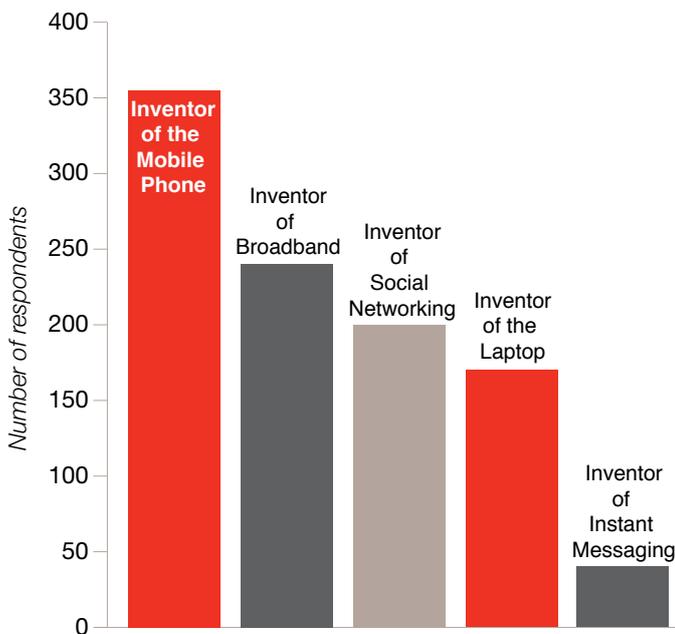


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# The man who changed the world

## Who is your greatest IT hero?



Who is your greatest IT hero?

Most 13 to 17 year-olds won't know who he is by name, but the IT hero of the real-time generation is Dr. Martin Cooper. Why? In 1973, he was the first to pioneer the truly mobile phone. Back then, Cooper's concept might have weighed over 2kg, but today it's changed the world.

The inventor of the mobile phone was the clear winner in a poll that asked respondents to pick their greatest IT hero. While many might have cited Steve Jobs as a likely candidate, Dr. Cooper was the man who made technology 'cool'. And he was more like a teenager than the teens themselves could have imagined.

After a long and intense race with Bell Labs' Dr. Joel S Engel, Motorola's Dr. Cooper made the world's first phone call using a handheld on April 3, 1973. Who did he speak to? None other than Dr. Engel.

*"Dr. Martin Cooper's concept might have weighed over 2kg in 1973, but today it's changed the world."*



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