Public Opinion

Public Attitudes to R&D 2025

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CaSE
Campaign for Science and Engineering

Contents

Foreword 2

Introduction 3

Implications and priority actions 4

Results summary 7

Priorities and outlooks 10

Awareness and understanding of R&D 14

Benefits of R&D 19

R&D and place 29

Investing in R&D 37

Engagement and involvement in R&D 45

Trust 49

Methods 53

About this report

This report details the results of CaSE's major research study, Public Attitudes to R&D 2025. It builds on the extensive public attitudes research CaSE has carried out since 2022, and is the first of a formal tracker survey that will be repeated every three years. This will allow the R&D sector to track and respond to changes in public attitudes over time.

CaSE thanks the many organisations and individuals who participated in workshops to shape the topics explored in the quantitative and qualitative research.

We also thank Phil Downing at Icaro for leading the study, along with the teams at Deltapoll and Brook Lyndhurst, and moderators of the focus group sessions. Finally, we want to recognise the contributions of the survey respondents and focus group participants who we engaged through this process.

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Foreword

When Campaign for Science and Engineering first began exploring public attitudes to research and development (R&D) in 2019, we didn't know exactly where we would end up. We hoped the work would provoke discussion, spark ideas and spur people to think differently about R&D advocacy. And indeed, it has been heartening to see the engagement, interest and discussions the work has driven.

Six years on, the world has changed significantly. Our latest study - Public Attitudes to R&D 2025 - demonstrates the continued need to make R&D matter to more people.

Many of the findings are positive. Most people support investment in R&D and see it as a tool to solve problems; they want to hear more, and support local R&D projects.

But the overriding message is one of caution. Because underneath these positives is another story; one where many people struggle to think of ways R&D benefits them or their families, or to connect it with the issues that matter most to them now. Such weak connections won't create the public champions our sector needs.

Across successive governments, UK R&D has benefitted from a broad political consensus. The fundamental need for R&D hasn't really been in question, the debate was how and when to support it. But if this political support fractures, we will need more than shallow public support to see our sector through.

We can't predict the future, but we can prepare for it. We must not be complacent; instead, we must act now to strengthen the foundations of public support.

We know this is possible: many across the R&D community are expert in building connections with the public. And our research provides evidence to steer this work, emphasising the need to focus on purpose, place and people.

We hope you will join CaSE in taking action to make R&D more human and more local.

Dr Rebecca Hilll
Public Opinion and Involvement Manager, CaSE

Dr Ben Bleasdale
Director of Public Opinion, CaSE

The results of this study provide a fascinating and comprehensive insight into the UK public's views on R&D. The research reveals support for public investment in R&D and an enthusiasm rooted in an appreciation of the need for society to grow and adapt to the demands of an ever-changing world.

Yet the findings also point to challenges. Awareness of R&D and the benefits it brings varies greatly. Some know what R&D is and can feel the benefits. Others, particularly those who feel the nation is in decline or that their communities are being left behind, feel largely disconnected.

R&D can feel distant, intangible and undertaken, in the words of one focus group participant, "in faceless buildings off the M4".

How, then, should the R&D sector respond? The research offers some clear insights.

- Firstly, R&D must become more tangible. It needs to showcase specific, real-world examples that focus on addressing a problem or priority.

- Secondly, R&D needs to get local. Few people are aware of the R&D activities taking place in their own communities, yet there is evident curiosity and appetite to learn more. The data shows a strong link between increased local awareness of R&D and greater engagement, connection, and support for enhanced funding for the sector.

- Finally, R&D must embrace storytelling. We must collectively recognise, however reluctantly, that statistics and rational argument alone are insufficient. R&D needs to connect emotionally and demonstrate public benefits - to individuals, to communities, and to society at large.

In the current zeitgeist of pessimism and gloom, R&D needs to articulate how it can be a positive part of the solution.

Philip Downing
Director, Icaro

Introduction

CaSE works to champion research and development (R&D) as a political and societal priority that can transform lives and livelihoods. R&D underpins so much of UK society; it tackles major societal challenges, helps grow our economy and creates jobs and opportunities for people of all ages.

But R&D can only deliver these impacts if policymakers continue to make supportive decisions, which in the long-term requires the public's buy-in. If we cannot demonstrate to the public the benefits of supporting R&D, especially in times of crisis, we will struggle to keep policymakers on side. The support of both is essential for the sector's ongoing success.

Our new landmark study, CaSE Public Attitudes to R&D 2025, takes in the views of more than 8,000 UK adults through nationally representative polling, focus groups and interviews. It explores how they think and feel about R&D, its benefits and its role in their lives. It is the first step to creating a large and robust data series that tracks attitudes to R&D as a political issue over time, ensuring our sector can monitor and respond to trends and risks. The insights will also identify ways we can strengthen the connection between the R&D community and the public, boosting public support and helping to bolster political support.

Since 2021, CaSE has run a major public opinion programme that aims to make R&D matter to more people. We want to help R&D advocates start from the evidence; our research helps challenge assumptions, create compelling narratives and inform effective action. It is vital we monitor and respond to changes in those attitudes.

Supported by a grant from Wellcome, we have set up a research study that we will repeat every three years to create a long-term dataset full of useful and actionable information for the sector.

Each study will combine large-scale polling with qualitative research, with the themes, topics and questions informed by in-depth engagement with R&D advocates across disciplines and sectors. This research explores baseline awareness and instinctive attitudes to benefits and investment, along with R&D's role in solving problems and strengthening places.

The survey has 50 questions and was taken by a nationally representative sample of 8,000 UK adults. Qualitative research comprised eight focus groups across the UK and in-depth interviews with 20 individuals. This report outlines the findings from both the quantitative and qualitative research, and – wherever possible – compares these with findings from CaSE's public opinion research between 2022-24.

CaSE's public opinion research is supported by a consortium of research agencies, with questionnaire design, qualitative research and reporting led by a team from Icaro, and quantitative fieldwork delivered by Deltapoll.

Methods

The research was led by Icaro and adopted a mixed methods approach. Full methods can be found at the end of the report.

Quantitative research

A large-scale survey of 8,000 UK adults recruited through proprietary online panels. Quota targets were set on: region, age and gender (interlocked within region) and ethnicity to ensure that the sample reflects the known profile of the UK population on these demographic criteria. The survey took place online, across 11-21 July 2025.

Qualitative research

Eight in-person focus groups were carried out across the UK, with 64 participants. Supplementary research involved follow-up in-depth interviews with 12 participants with a moderator, and follow-up video interviews where 12 participants each answered six questions through a dedicated research app called Indeemo.

Socioeconomic group

Our research uses the term socioeconomic group, which describes the types of job someone does and is based on the main income earner in the household.

- AB – Intermediate and higher managerial professions
- C1 – Junior managerial professions
- C2 – Skilled manual workers
- DE – Semi- or non-skilled manual workers and non-working people

Implications and priority actions

For decades, UK R&D has benefitted from broad cross-party political buy-in, with debate largely confined to how and when to support the sector. But we know political support can easily fracture. If this happens, we will need public champions, which can only be created with widespread and deep public support.

The results of CaSE Public Attitudes to R&D 2025 suggest that public support is broad but shallow. Although there is support for R&D investment, society's connection to the people, processes and places associated with R&D is weak, and many struggle to see or feel the benefits it brings.

As a sector, we must work harder to move the public's connection with the R&D community – from a vague sense of approval, towards a stronger relationship.

Reflecting on the results of our latest study and what they might mean for the R&D sector, CaSE has identified a set of overarching themes and priority actions.

There is a sense of pessimism in the UK and the public's priorities are evolving

A majority say the UK is a country in decline, with not enough opportunities for young people to get ahead in life, and not even four in ten are optimistic things will get better. The public's three highest priorities – improving the NHS, the cost of living and growing the economy – remain consistent with previous polls. However, concerns about climate change are falling down the public's list of priorities, while crime and immigration are rising. The R&D sector must consider how to remain relevant amid these shifting priorities.

Awareness of R&D is broadly good but knowledge of the breadth and depth of the sector is weaker

Four in ten say they have heard of R&D and know what it means, rising to 82% when "research and development" is spelled out in full, and just under half (47%) say they would be confident to explain what R&D is to their friends and family. However, the people, processes and places linked to R&D – and the range of problems it tackles – seem opaque. The public initially links R&D to mainly medicines and technology, and universities are seen primarily as education institutions rather than centres of research. There is more to do to demonstrate the scale of the research workforce and champion the breadth and depth of R&D in the UK.

The public feels disconnected from R&D and its benefits on both a national and local level

Just 29% feel a connection or personal interest in R&D, almost half had done none of a list of R&D related activities, such as watching a TV programme or visiting a science museum, in the past year, and few focus group participants could name examples of local R&D. Meanwhile, less than a third can immediately think of lots of ways R&D benefits the UK (29%) or their region (22%), falling to just 18% when asked about their local area or them and their family. Qualitative research shows that these benefits feel vague and hard to articulate, especially on a personal level, and some describe R&D as making life easier but not necessarily better.

Neither do the public necessarily see R&D's role in their highest priority issues. Although 79% think R&D has an important or essential role to play in improving the NHS, only around half feel this way about tackling the cost of living or reducing crime. The disconnect between the realities of people's lives and their perceptions of R&D's role in society will be the major barrier to gaining public support.

Implications and priority actions

Shallow connections weaken public support for R&D - this is a risk for political buy-in

On the face of it there are high levels of support for investment, with 88% agreeing it is important for the Government to invest in R&D. But the public's lack of connection to R&D and its benefits means this support is fragile. We cannot assume that the public will continue to back investment into something that doesn't feel tangible, and whose benefits they don't personally see or feel in their lives. Moreover, we cannot expect the public to advocate for something they don't feel an emotional connection to – especially at times of crisis or financial pressure. Political support can quickly wane and, if it does, we cannot expect an outcry from the public.

Place, purpose and involvement remain the most powerful connection points

A majority support a new R&D laboratory or science museum being built in their area and can easily identify the benefits of local R&D to the local economy and job market. And, although awareness of local R&D was low (74% said they know nothing or hardly anything about R&D being done in their area), some 70% said they would like to hear more from researchers about R&D in their area. Qualitative research consistently showed high levels of pride and interest in examples of local R&D.

The public want to understand the purpose of R&D, but the people, processes and places associated with it are opaque. The sector can, and should, tell better stories about how R&D – and the full range of people who deliver it – are solving the problems people care about; it is easier to connect with societal benefits than profit margins.

Meanwhile, there is strong support for public involvement in decision-making about R&D investment and interest in participating in research. The role that participation can play in providing the public with a base of familiarity and trust in the R&D sector's work must not be undervalued.

We cannot be complacent and need to act now – but we are not starting from scratch

Since CaSE ran its first public attitudes study, the nature of UK politics has changed. In this shifting landscape there is a risk that cross-party political support for R&D breaks down – or even that hostility towards R&D or the organisations delivering it is seen as politically advantageous. The sector cannot afford to wait.

However, we are not starting from zero. We can build on the public's broad awareness and instinctive support, and we benefit from high levels of trust in R&D sector voices to talk about both R&D and R&D investment. We know that those with stronger connections feel more positively about R&D, and so our focus must be on building those relationships. Neither should we shy away from conversations about risk, time lags or funding for discovery research; our study demonstrates these are readily accepted by the public when approached transparently.

The sector holds a wealth of expertise in building lasting connections with the public, but communication, engagement and involvement are time consuming and costly to do ethically and effectively. We must not be complacent about what is needed to create deeper and more trusted connections with the public. There is a risk that immediate pressures will hinder this work, ultimately eroding the sector's long-term financial outlook.

Implications and priority actions

Priorities for the next three years

The R&D sector must not delay action. We have identified nine priorities to collectively work towards over the next three years to position our sector for the future.

- **Act collaboratively and with urgency** to develop more coherent and compelling narratives about R&D's role in society.
- **Make R&D feel more human and more local** by opening up the processes and places associated with R&D, to help build and maintain trust.
- **Demonstrate R&D's relevance to priority issues** by showing that our sector is helping to tackle the issues that matter most to the public now.
- **Foreground the breadth and scale of the R&D workforce** to highlight their contribution not just to research itself, but also to local communities.
- **Bring a sense of pride and optimism** to the public, recognising the general sense of public pessimism and offering R&D as a route forward.
- **Ensure sustained commitments to communication, engagement and involvement** through long-term, sufficient resourcing – including funding, time and training – and strong leadership from R&D leaders and organisations.
- **Make politicians advocates not adversaries** by equipping them with the evidence, examples and confidence to talk to the public about R&D on the doorstep.
- **Trial and evaluate the impact of local engagement** through qualitative and quantitative research and the creation of evidence that maps R&D activities at a local level, seizing existing opportunities to do so.
- **Collectively map resources on public attitudes** across the sector to help identify opportunities to collaborate and evidence gaps to be filled.

We urge everyone to consider this study's findings and its implications for both their own work and that of the sector. CaSE will be doing the same.

This study will inform our future work, identifying areas that require further exploration and opportunities to collaboratively turn insights into action. Throughout, we will continue to advocate for the changes needed to build a strong R&D system that benefits the lives and livelihoods of people across society.

Results summary

This section summarises the findings from Public Attitudes to R&D 2025 by theme, including short comparisons with CaSE's previous public opinion research findings. The section ends with a summary of notable differences within demographic groups, and by vote intention and outlooks. Further details and data visualisations can be found throughout the report and on our website.

Priorities and outlooks

- There is an overall sense of pessimism among the public, with 62% agreeing that the UK is in decline and just 39% saying they are optimistic things will get better.
- Local sentiment was more positive, with 39% saying their area was thriving or doing fairly well compared to 25% saying it is doing fairly badly or falling behind.
- The top three priorities for the UK public were improving the NHS, tackling the cost of living and growing the economy.
- Immigration was a prominent issue, ranking fourth by highest priority but falling to tenth on highest priority/priority.
- Investing in research, science and technology was seen as a priority by 71%, including 20% who identified it as a highest priority.
- Compared with CaSE research since 2022, the top three priorities remain consistent, but there appears to be more concerns about immigration.

Awareness and understanding of R&D

- Some 40% said they had heard of the term "R&D" and know what it means, rising to 82% when "research and development" is spelled out in full.
- Initial associations with R&D tended to focus on consumer technologies and medical advances, rather than the arts or humanities. Prompting with a wider definition allowed the public to consider R&D's role in delivering social benefits.
- R&D was most often associated with the private sector in focus groups, with universities rarely front of mind and seen primarily as education institutions. The role of universities is more likely to be recognised when the public are prompted.
- The public struggle to understand the scale of the R&D workforce and, although viewed favourably, most do not consider researchers to be "like them" and stereotypes persist.
- The awareness levels and associations with R&D seen in this study are very consistent with previous CaSE research.

Benefits of R&D

- Less than a third could immediately think of lots of ways R&D benefits the UK (29%) or their region (22%), falling to just 18% when asked about their local area or them and their family.
- However, 80% said that it was at least somewhat important that R&D delivers benefits for them and their family.
- Only around four in ten (41%) said that R&D was relevant to their life, and just 29% said they feel connected with R&D.
- Around half (45%) said that R&D benefits some in the UK more than others, with the main beneficiaries seen to be the wealthy or elite and the private sector.
- Some 43% said that R&D happens much more in some areas of the UK than others, and 69% think that ensuring that R&D is spread evenly across the UK should be a Government priority.
- Two in three (67%) agreed R&D should be a tool to solve society's problems, but there was a disconnect between some of the public's priority issues and R&D's perceived role in addressing them.
- The intangibility of R&D's benefits is consistent with previous CaSE research, as is the finding that the public think R&D should be used as a tool to solve problems.

Results summary

R&D and place

- A majority of around seven in ten said they feel a connection to each of their area, their town or city and UK region.
- Almost three quarters (74%) said they knew hardly anything or nothing about R&D in their local area, but 70% agreed they would like to hear more.
- In focus groups, few could give examples of local R&D, but when provided they were well received by a strong majority.
- More than four in five (83%) could identify potential benefits from more local R&D activity, most notably growing the local economy, creating more opportunities for young people in the area and bringing well paid jobs.
- Some 56% would support a new R&D laboratory in their local area, while 68% would support a new science museum or discovery centre. In focus groups, participants demonstrated a genuine appetite and excitement for both.
- Just 17% think that the UK is a world leader in R&D, but 46% said that this should be the UK's aim.
- These findings support previous CaSE research that place is a strong connection point. Responses on local awareness, appetite and perceived benefits of local R&D are very similar, although support for an R&D lab being built in their area has dropped slightly.

Investing in R&D

- Some 88% said it was at least somewhat important for the Government to invest money into R&D, and 71% think the Government should either increase or maintain levels of R&D investment.
- Time lags, risk and the trade-offs of investing in R&D are not an insurmountable barrier to public support, but they do concern around a quarter of the public.
- If there was extra money to invest in R&D, a majority (86%) said that new medicines and treatments should be a priority, followed by cleaner energy sources (72%).
- More than seven in ten (71%) agreed that the private sector has an important role to play in UK R&D, although focus groups demonstrated some concerns about the profit-driven motivations of business R&D.
- Half of people favoured an even mix of fundamental and applied research, after which there was a modest skew towards the latter.
- Levels of support for investment in R&D, along with attitudes to risk and time lags, and appetite for spending taxpayers' money on R&D are comparable with previous CaSE research.

Engagement and involvement in R&D

- Just over half of the public (54%) have done at least one of a list of R&D activities in the past 12 months, but more than seven in ten (72%) would like to do at least one in the next 12 months, including 37% who would like to visit a science museum.
- There are high levels of support for greater transparency and public involvement in R&D. Some 80% agreed that the public needs to know more about how taxpayers' money is used for R&D, and 77% said that researchers should engage more with the public about the social and ethical implications of their research.
- Many stated a personal interest in participating in research studies (46%), using lived experiences and knowledge to help researchers identify research topics and design research studies (41%) and contributing to decisions about R&D funding or policies (26%).
- The qualitative research emphasised interest in R&D institutions engaging more with communities and schools, and making more use of traditional, local and social media.
- Many of the questions in this section were being asked for the first time, and so direct comparisons cannot be drawn.

Results summary

Trust

- A large majority said that they would trust information about R&D from research charities (84%), researchers (81%) and universities (77%).
- There are high levels of trust in R&D voices to talk about how much money the Government should invest in R&D, at 80% for research charities, 74% for researchers and 72% for universities.
- Across both trust questions, the least trusted groups were politicians, commentators on social media and journalists.
- The qualitative research emphasised the importance of the public hearing from experts and people who reflected them or their communities.
- Compared with previous CaSE research, this study suggests higher levels of trust in R&D sector voices, but the overall ranking of messengers is comparable to previous studies.

Demographic differences

Alongside UK-wide results, this report highlights differences between demographic groups, regions, voting intention and the way respondents answered other questions.

The most notable demographic differentiators were socioeconomic group and level of formal education, with gender being a consistent, but less strong trend. Those in group DE, with lower levels of formal education and women tended to feel less connected and less positive towards R&D. These trends are consistent across the survey, with examples highlighted below.

- **Socioeconomic group**: Those in group AB were more likely than those in group DE to think of lots of ways R&D benefits them or their family (65% compared with 38%); to support an R&D laboratory being built locally (72% compared with 44%); and to have done at least one R&D related activity in the past 12 months (71% compared with 39%).
- **Education:** Postgraduates were more likely than those with GCSE/O levels to think of lots of ways R&D benefits them or their family (75% compared with 36%); to think the UK should aim to be a world leader in R&D (63% compared with 35%); and to have done at least one R&D related activity in the past 12 months (81% compared with 36%).
- **Gender**: Men were more likely than women to feel a connection or personal interest in R&D (35% compared with 23%); to support an R&D laboratory being built locally (65% compared with 49%); to think the UK should increase or maintain investment in R&D (78% compared with 65%); to think the UK should aim to be a world leader in R&D (55% compared with 38%).

In this study, age was a less consistent differentiator than in CaSE's previous research, with less positive correlation consistently throughout the survey. There were some notable differences for specific age groups, which are discussed in the relevant section.

There are differences on voting intention, with those intending to vote Labour and Conservative tending to be more supportive of R&D across a range of measures, compared to those intending to vote Reform. For instance, Labour or Conservative voters were more likely to think of lots of ways R&D benefits them or their family than Reform voters (66%, 55% and 39%, respectively).

Reform voters were more likely to think the UK has fallen behind on R&D (34% compared with 15% for Labour voters) and less likely to support an R&D laboratory being built in their area (50% compared with 71% for Labour voters). Levels of distrust in researchers were also higher among Reform voters (16%, compared with the UK average of 11%).

Finally, the survey consistently demonstrates that people feeling connected to their area and think it is doing well, and being aware of local R&D activity, positively influences receptivity to, and support for, R&D.

- **Connection to their community**: Those who feel connected to their local area and those who think their area is thriving were more likely to support an R&D laboratory being built in their area. Those who feel their area is not doing well are more likely to think the UK has fallen behind in R&D.
- **Knowledge of local R&D**: Those who said they knew a lot about R&D in their area were more likely to be able to think of ways R&D benefits them or their family, and to think the UK should increase or maintain investment in R&D.

Priorities and outlooks

Key takeaways

- There is an overall sense of pessimism among the public, with 62% agreeing that the UK is in decline and just 39% saying they are optimistic things will get better.
- Local sentiment was more positive, with 40% saying their area was thriving or doing fairly well.
- The top three priorities for the UK public were improving the NHS, tackling the cost of living and growing the economy.
- Immigration was a prominent issue, ranking fourth by highest priority but falling to tenth on highest priority/priority.
- Investing in research, science and technology was seen as a priority by 71%, including 20% who identified it as a highest priority.
- Compared with CaSE research since 2022, the top three priorities remain consistent, but there appears to be more concerns about immigration.

Priorities

To understand the context in which R&D sits, and in which the sector must advocate, it is important to first understand the public's priorities. Respondents were asked to indicate how much of a priority a set of issues should be in the UK. This list was chosen to represent typical high-level manifesto or political priorities, such as the NHS, the economy, crime, immigration and energy, as well issues of relevance to the R&D sector, such as investing in research, tackling global problems and attracting high skilled workers from overseas.

The public's priorities (Figure 1) were led by improving the NHS (selected by 94% as either 'highest priority' or 'a priority') and reducing the cost of living (94%). These are closely followed by growing the economy (91%) and reducing crime (90%).

Reducing immigration also featured prominently but was more polarised. It was ranked fourth by 'highest priority', but falls to tenth on net 'highest priority' and 'priority' because a sizeable minority did not consider it a priority. There was a strong correlation with vote intention, with this issue ranking first among those who intend to vote Reform (82% said it was a 'highest priority').

The issues that were less likely to be identified as priorities, relative to the others, include enabling older people to participate fully in society (a priority for 65%), tackling climate change (64%), addressing global problems (55%) and attracting skilled workers from overseas (39%).

The top three issues are consistent with previous CaSE research. In contrast, concerns about crime and immigration have risen, while climate change appears to be falling. (It should be noted that although the broad issue areas in this question are the same, this study included additional options, such as attitudes to overseas workers and investment in research, science and technology.)

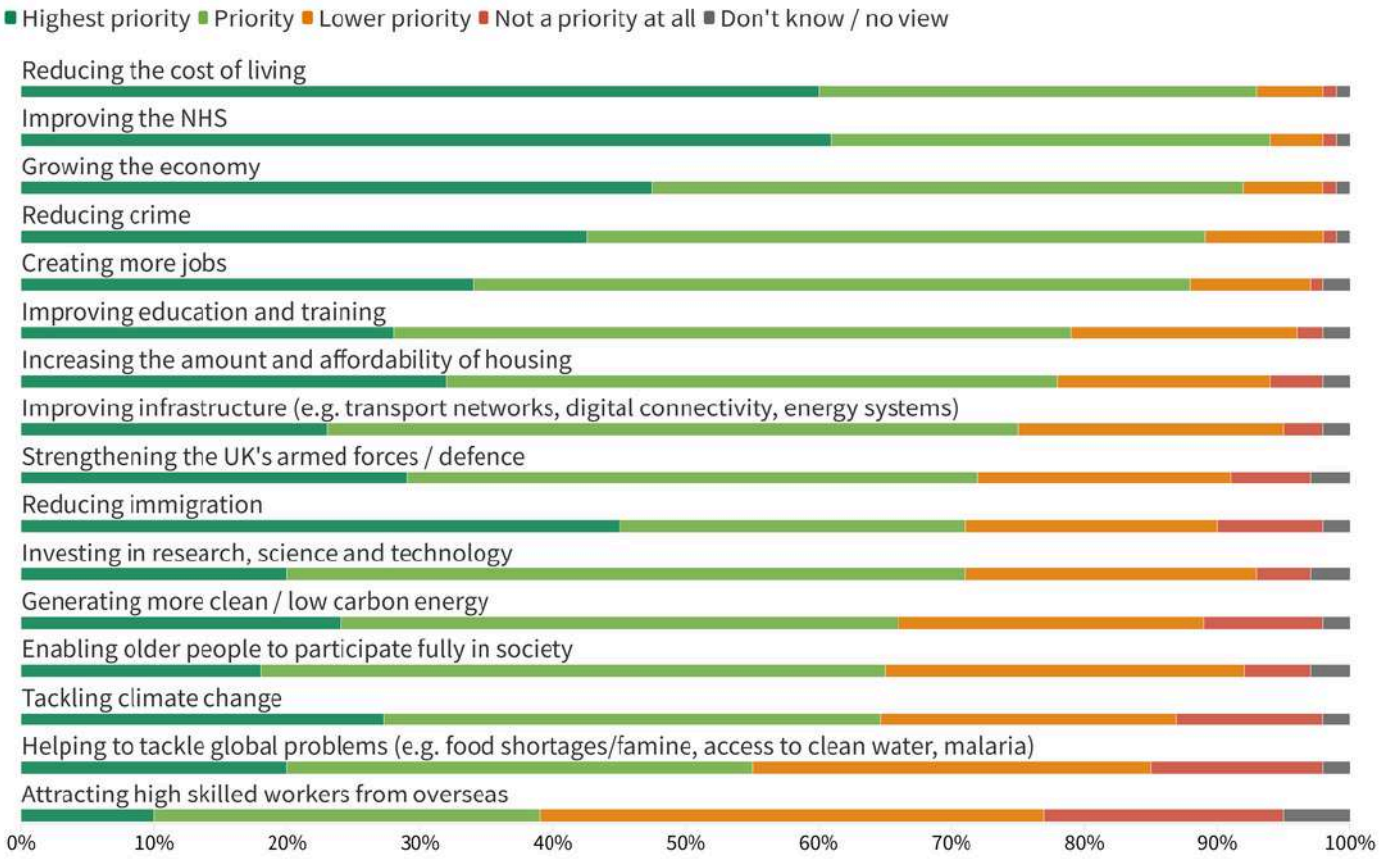
This point in the survey also explored the public's unprimed opinions on investment in research, science and technology as a priority area before they had been shown the term R&D in the survey. Around seven in ten (71%) considered it a priority, including one in five (20%) who identified it as a 'highest priority'.

Looking in more detail at the responses for research, science and technology, a majority across all demographic sub-groups identified it as a priority. Nonetheless, key differences are evident according to highest educational level (83% of post-graduates identified it as a priority compared with 56% of those with GCSE/O level), socioeconomic group (80% of AB compared with 64% of DE), age (lowest among 18-24s at 66%) and geographic region (highest in London at 75%). There is also a small but statistically significant difference by gender (75% of men compared with 68% of women).

Beyond demographics, there are moderate differences by vote intention, with those intending to vote Reform and those not intending to vote both less likely to identify research, science and technology as a priority (66% and 58%, respectively).

Priorities and outlooks

Figure 1: What are the priority issues for the public?



Source: Deltapoll and Icaro polling for CaSE • July 2025
How much of a priority do you think the following should be for the UK? n=8,000

There are also some powerful correlations with local outlooks, including:

- Perceptions of how well their local area is doing, with 86% of those who feel their area is 'thriving' considering research, science and technology as a priority compared with 67% of those who feel their area is doing badly or being left behind.

- Awareness of R&D happening in their areas, with 82% of those who know 'a lot' about R&D in their area considering it a priority compared with 68% of those who don't know much/anything.

There is also a corelation with topics of interest. Some 82% of those who said they have a general interest in science identified it as a priority, as do 80% of those who said they have an interest in technology.

The qualitative research broadly supports these findings, particularly for the top five priorities, with cost of living and crime recurring themes across all the focus groups.

Reflecting the survey results, immigration was a polarising issue that was typically considered the most important priority among those intending to vote Reform, but less so among centre left voters.

However, the focus groups - which were anchored in a discussion about local priorities - also raised a suite of different issues and perspectives. This included strong themes running across most locations related to:

- Crime, including anti-social behaviour (especially youth crime), gangs, and drugs.

- Struggling local areas and people, including homelessness, cuts to public services, businesses closing, derelict buildings, and struggling high streets and town centres.

- 'Liveability' issues, such as dog fouling and litter, poor public transport links, traffic congestion and potholes.

Priorities and outlooks

Outlooks

The prevailing sentiment is largely pessimistic (Figure 2). More than three in five (62%) agreed with the statement "The UK is a country in decline", whereas far fewer (39%) agreed with the statement "I'm optimistic that things will get better in the UK". Only around one in four (27%) agreed that working people get a fair share of the nation's wealth.

There is a notable inward facing focus, with more than two in three (68%) agreeing that "There are too many problems in our own country to worry about problems elsewhere". This is notably higher than in CaSE's 2022-23 research, when 51% agreed there were too many problems in our own country to worry about problems in other countries.

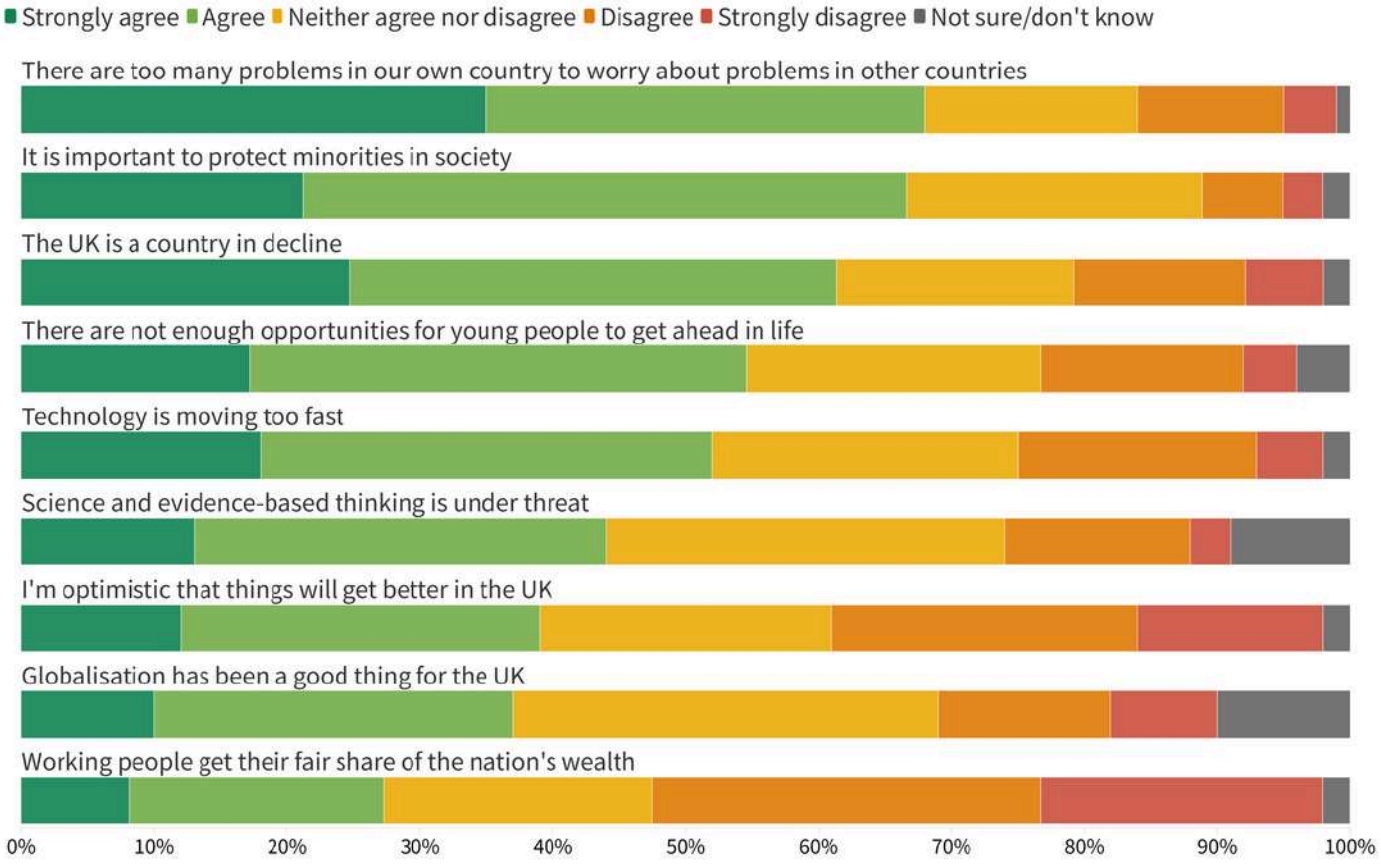
More than half (52%) agreed with the statement that "Technology is moving too fast" and a similar proportion agreed that "There are not enough opportunities for young people to get ahead in life" (54%).

Perceptions of how well their area is doing

Shifting from a national to a local focus, perceptions of how well their local area is doing vary markedly (Figure 3). Two in five (39%) described their own area as either "thriving" (6%) or "doing fairly well" (33%), compared to a sizeable minority who described it as "doing fairly badly" or "being left behind" (25%). A large group of just over a third (35%) described it as "neither doing well nor badly" or said they don't know or aren't sure.

Some groups were much more likely to feel their area is doing well, particularly by region (55% in London compared with 33% in Yorkshire & Humberside and 28% in the North East), age (47% of 18-24s and 55% of 25-34s compared with 32% of those aged 65+), socioeconomic group (56% of AB compared with 29% of DE), those with children at home (59% with children aged 0-10 compared with 33% with none) and education (61% among postgraduates compared with 29% of those with GCSE/O-Level).

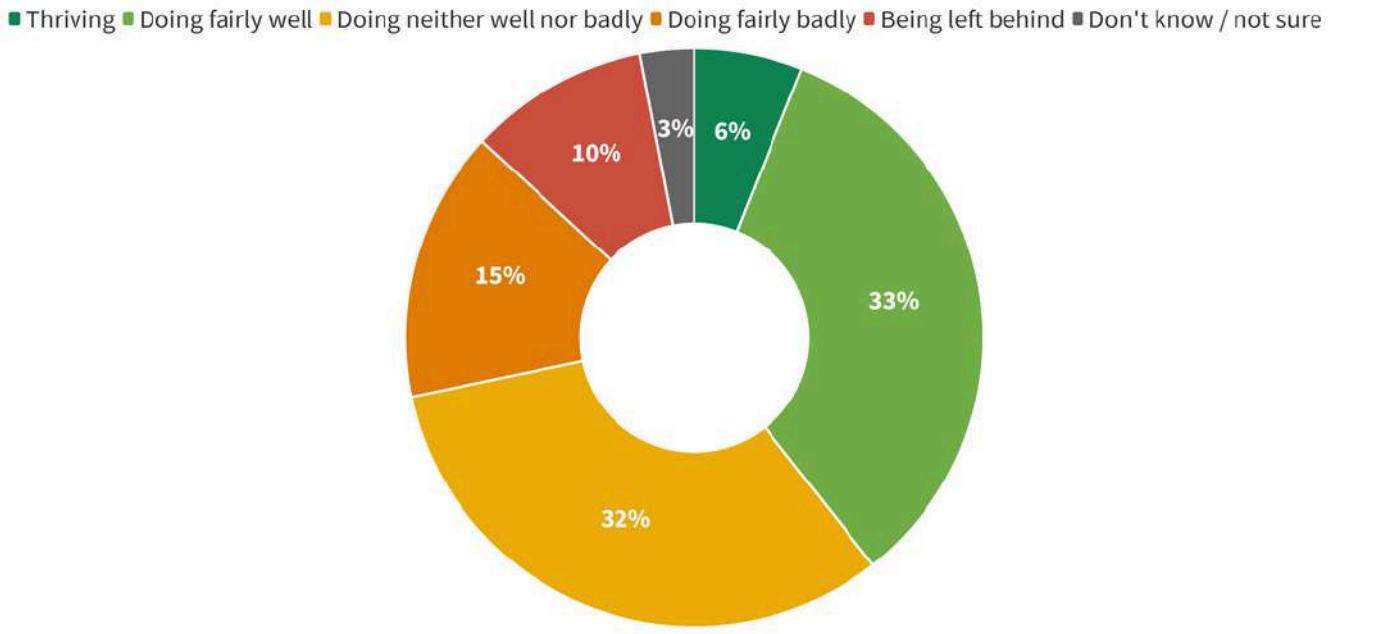
Figure 2: What is the public's outlook on the UK and society?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Do you agree or disagree with the following statements? n=8,000

Priorities and outlooks

Figure 3: How well do the public think their area is doing?



Source: Deltapoll and Icaro polling for CaSE • July 2025
How well do you think your area is doing? Would you describe it as… n=8,000

Beyond demographics, differences by voting intention are also evident. Those intending to vote Labour or Conservative were more likely to feel their area is doing well (56% and 45%, respectively), in contrast those intending to vote Reform (27%) and those who say they would not vote (28%).

There is also a correlation with how connected people feel to their local area – 62% of those who said they felt a very strong connection to their local area think it is doing well, compared to just 7% among those who do not feel any connection.

This variation in opinion about how well the local area is doing also played out across the focus groups. While all groups could find positives about their local areas, there was a prevailing sense of "decline", "decay" and "sadness" among participants in Middlesbrough, Nottingham, Clacton and Sutton/Croydon.

This was not as evident in Cardiff, Taunton, Edinburgh and Belfast, where sentiment was positive on balance.

> "The homelessness, the alcohol and drug addicted people right by the station is tragic and it's there's no other word for it."
> **Male, 45-54, Sutton/Croydon, AB, Focus group**

> "To be fair we did have that [knife crime] before. But now it's like a phoenix rising out of the ashes. Belfast is really bustling now and it's got lots going for it."
> **Female, 45-54, Belfast, C2, Focus group**

Awareness and understanding of R&D

Key takeaways

- Some 40% said they had heard of the term "R&D" and know what it means, rising to 82% when "research and development is spelled out in full".
- Initial associations with R&D tended to focus on consumer technologies and medical advances, rather than the arts or humanities. Prompting with a wider definition allowed the public to consider R&D's role in delivering social benefits.
- R&D was most often associated with the private sector in focus groups, with universities rarely front of mind and seen primarily as education institutions. The role of universities is more likely to be recognised when the public are prompted.
- The public struggle to understand the scale of the R&D workforce and, although viewed favourably, most do not consider researchers to be "like them" and stereotypes persist.
- The awareness levels and associations with R&D seen in this study are very consistent with previous CaSE research.

Awareness of the terms "R&D" and "research and development"

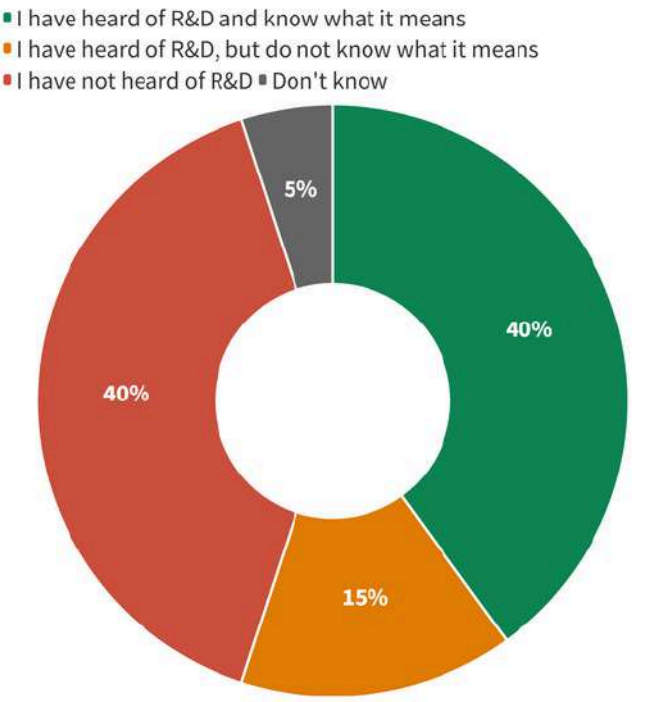
CaSE uses the term "R&D" in its public opinion research. Previous testing of a range of different terms found that "R&D" receives broad support in the context of investment, education and jobs, and is viewed by the public as covering the range of disciplines and organisations within our sector. (Read CaSE's research and advice on terminology here.) CaSE's polling first tests unprimed recognition and then provides a definition of R&D (see next section).

Spontaneous recognition of the term "R&D" is mixed. Two in five (40%) UK adults reported that they have heard of it and know what it means, a further 15% said they have heard of it but don't know what it means, while 45% said they have not heard of R&D before or don't know (Figure 4). This is consistent with CaSE's previous research, which found that 44% had heard of R&D and knew what it meant.

There are significant variations in initial familiarity with the term R&D across sub-groups, the strongest of which are by gender (53% of men said they have heard of it and know what it means compared with 28% of women), socioeconomic group (59% of ABs compared with 24% of DEs) and highest educational level (57% of post-graduates compared with 23% of those with GCSE/O level). There are also observable differences by age (awareness among 18-24s is far lower – at 24% - than all other age groups) and region (awareness is highest in London (46%) and lowest in the Midlands at 36%).

Awareness is higher among those intending to vote Conservative (46%), Labour (46%) and Liberal Democrat (48%) and lower among those intending to vote Reform (36%) and those who would not vote (26%). There is also a correlation with topics of interest – more than half (54%) of those who are particularly interested in science said they know what R&D is, as do 51% of those who said they have an interest in technology.

Figure 4: How familiar are the public with "R&D"?

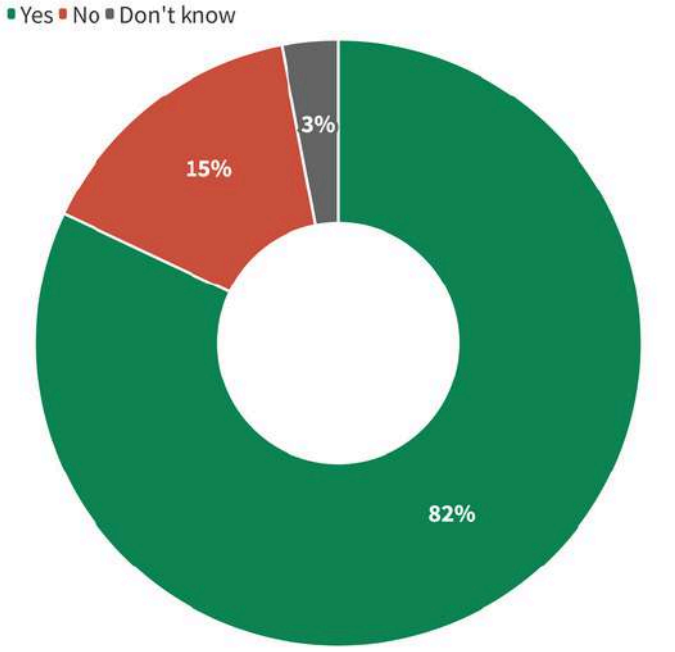


Source: Deltapoll and Icaro polling for CaSE • July 2025
How familiar, if at all, are you with the term "R&D"? n=8,000

Awareness and understanding of R&D

When presented with the full term "Research and Development", recognition increased substantially to 82% (Figure 5), which aligns with CaSE's previous research (also 82%). However, a sizeable minority of close to one in five (18%) said they had not heard of this phrase before, increasing among some sub-groups (for instance, to 26% among socioeconomic group C2DE, 27% among those whose highest educational qualification is GCSE/O-Level and 32% among those who say they would not vote).

Figure 5: How familiar are the public with "Research and development"?



Source: Deltapoll and Icaro polling for CaSE • July 2025
"R&D" stands for Research & Development. Have you heard of this phrase before? n=8,000

Despite the increase in headline recognition, fewer than half (47%) agreed with the statement "I would be confident to explain what R&D is to my friends and family". The groups who feel less confident are women (only 30% agreed with the statement), both the 18-24 and 65+ age groups (43% and 40%, respectively), those in socioeconomic group DE (29%) and those whose highest educational level is GCSE/O-Level (28%).

The qualitative research mirrored these findings. In the focus groups there was initially a consistent lack of awareness of the term "R&D". Those who spontaneously knew what the term meant ranged from one participant in Middlesbrough and Nottingham to three in each of Cardiff, Clacton, Taunton and Edinburgh.

> *[What do you think R&D stands for?]*
> "No clue. Not a clue."
> **Female, 45-54, Clacton, C2, Focus group**

Awareness was higher among those in higher socioeconomic groups and/or in relevant professional roles. This included a participant in Taunton who had engaged with R&D tax credits, a participant in Nottingham who was involved in patenting mattresses with sensors to guard against ulcers, and another in Edinburgh who referenced graphene and its importance to Manchester. It was also higher among those with a pre-existing interest in science or technology, which often traced back to their enjoyment of the subject at school.

> "Curiosity, really. Yeah, I've always had a massive interest, mainly in science and things like that, and I follow people like Elon Musk and the Space X program. A lot of these developments, biotech, nanochips and things like that."
> **Male, 45-54, Clacton, C2, Focus group**

Associations with R&D

The CaSE definition of R&D was introduced – in both the survey and focus groups – once spontaneous awareness and reactions had been captured.

Research and Development (R&D) refers to any work that aims to solve a problem or increase what we know. This includes what we know about humankind, culture and society, as well as what we know about the world around us.

R&D can lead to new discoveries and ideas, or the invention or improvement of products and services. In short, R&D is often the first step to creating something new.

Once given this definition in the survey, the majority associated a range of different thematic areas as R&D (Figure 6). The association is most evident for new medicine and treatments (85%), advances in space exploration (79%) and cleaner energy sources (75%), followed by advances in defence/military technology (74%), consumer technology (73%) and AI (71%).

Awareness and understanding of R&D

By contrast, a high proportion of UK adults did not naturally associate the improved delivery of public services (42%), fairer legal systems (53%) or advances in film and the performing arts (55%) as R&D. This is consistent with CaSE's previous research, which identified more natural associations with medicine and technology than areas linked to the humanities or arts.

Survey respondents associated R&D with a range of organisations (Figure 7). The UK Government (65%) and universities (64%) were selected most, followed by large businesses in the UK (53%), multinational corporations (52%), the NHS (51%) and charities (46%). There was lower recognition of the role of small and medium sized businesses in the UK (23%). Only a small minority (6%) did not associate any of the organisations as undertaking R&D.

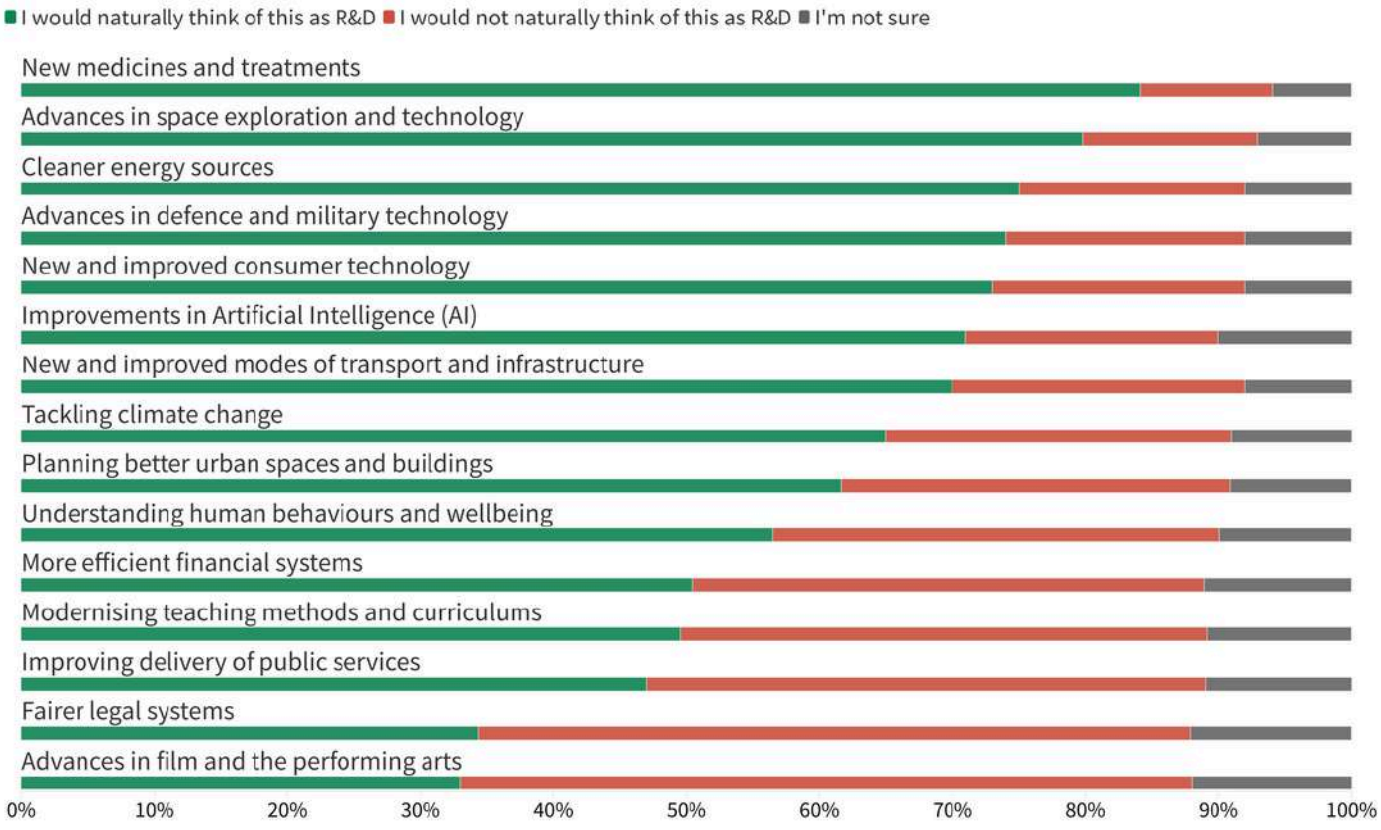
The qualitative research captured the journey that participants went on from hearing the term R&D, to the topics and actors they associated with it. These findings are consistent with CaSE's previous qualitative research.

The immediate associations made in focus groups – prior to introducing the definition of R&D – focused on advancements in consumer technology or products and advancements in medicine, followed in some instances by the development of food products. Many also related R&D to market research or consumer testing. Only a few participants made any links beyond these applications. There was also a consistent skew towards R&D as a private sector-led endeavour, undertaken for profit.

> "They'll get people in to test [computer games], they'll play Call of Duty and they'll say what they think."
> **Male, 25-34, Belfast, C1, Focus group**

> "When you say R&D I think of a big company like, you know, a multinational company like Apple or a pharmaceutical company or something like that, right? Or even a food manufacturing company like Unilever or something like that."
> **Male, 45-54 Sutton/Croydon, AB, Focus group**

Figure 6: What topics do the public naturally associate as being R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Which of these things would you naturally think of as Research & Development? Imagine if we weren't asking you about them in this survey – would they be things you would naturally think 'that's R&D'. n=8,000

Awareness and understanding of R&D

However, through the course of discussions most participants quickly became more confident and able to make a much wider range of linkages to R&D. Examples included vaccines, weight loss injections, smartphones, apps, AI, electric cars, renewable energy, transport, urban planning, safer pesticides, the UK Census, genetically modified food and contactless payment systems. Several participants drew on experiences from their own professions, for example a plumber referenced heat pumps, and a car mechanic referenced better tyre technology and car safety features.

> "I found it quite difficult at first in the focus group to think of examples - just because it was so new to me. But then the more we spoke as a group, I realised it was just, you know, having an issue and then finding or inventing a way to make that issue better or easier for people. So that did make it easier."
> **Female, 35-44, Middlesbrough, C1, Indeemo**

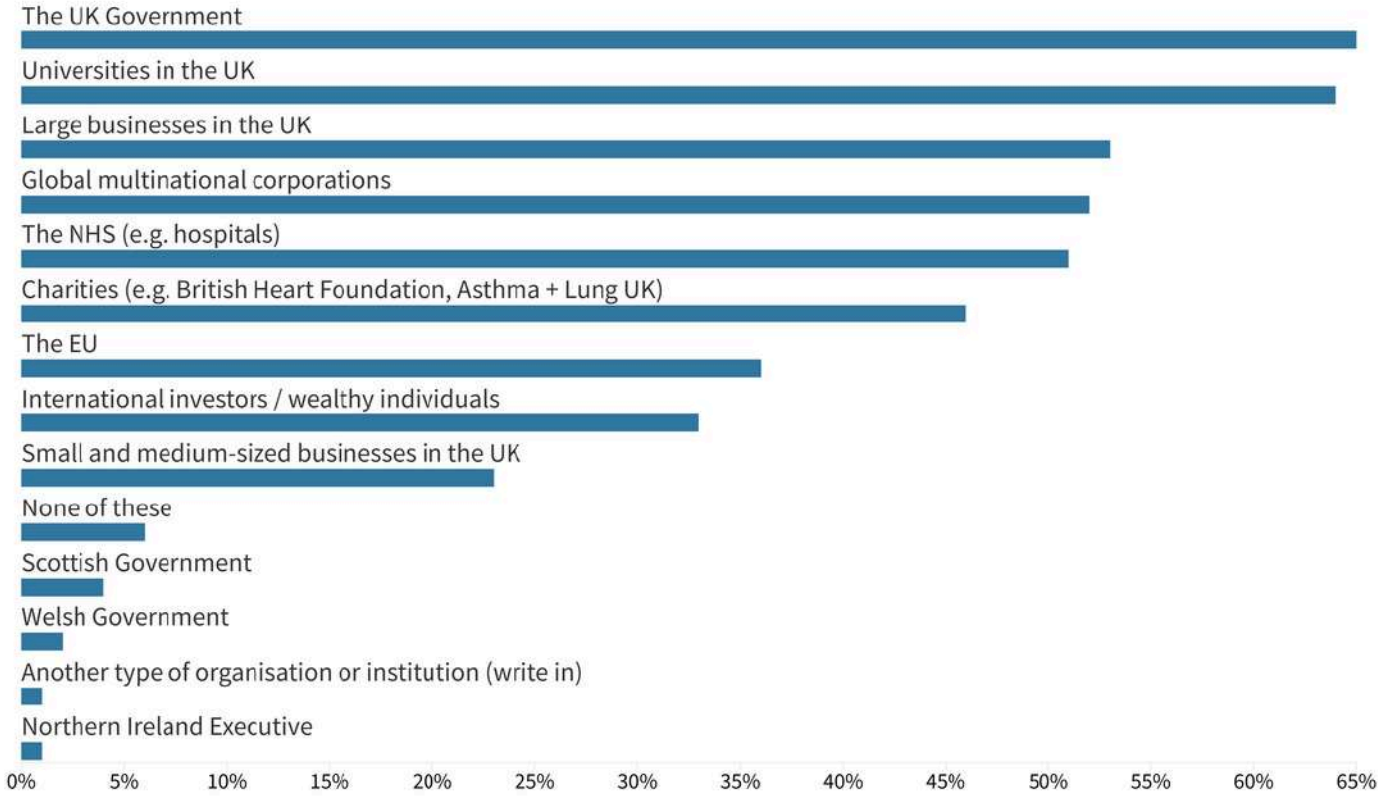
The CaSE definition of R&D was useful in the groups to broaden the scope beyond consumer technology and medicine, as well as allowing participants more freedom to think of non-STEMM examples. It shifted the narrative away from R&D as a private sector-led endeavour towards something that delivers against societal issues and priorities, and triggered some participants to spontaneously mention universities and academic research, often for the first time.

> "I think after everything we've said, you realise research and development is in everything. Applies to everything."
> **Female, 55-64, Taunton, AB, Focus group**

However, the definition did cause a degree of confusion for some, in that it broadens R&D so wide that it becomes all-encompassing and lacks specificity. Some participants then extended it to include council consultations or improvements to local parks. Others struggled to get beyond their initial preconceptions that R&D is led by the private sector.

> "Looking at humankind, culture and society - I would not have put that under R&D. That would not have been something that came to mind, I would think more medical and tech."
> **Female, 25-34, Clacton, C1, Focus group**

Figure 7: Which organisations do the public associate with R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
And which of these organisations do you associate as doing, or funding, Research & Development? Select all that apply. n=8,000

Awareness and understanding of R&D

> "It is about inventing - so my mind automatically goes to technology, but I am struggling to see how that connects to society."
> **Female, 35-44, Middlesbrough, C1, Focus group**

The extent to which universities were associated with R&D was significantly different between the survey and the qualitative research. The survey, which involved respondents selecting options from a predefined list, suggested a strong level of association. However, the qualitative research demonstrates that universities are rarely front of mind without this prompt. Participants initially viewed universities as education institutions, where students or lecturers might do R&D as an ancillary activity, or opportunistically for extra money to supplement their teaching activities.

> "When you think of Exeter University, it was where I sent the children, spent a ridiculous amount of money, and they just drank on weekends and came home to do their washing. But if someone said "R&D at Exeter University," that wouldn't be anything that'd pop into my head, if I'm really honest."
> **Female, 45-54, Taunton, AB, Focus group**

However, once the framing of universities as R&D institutions was introduced into the discussion, participants comfortably recognised their role as centres of research and knowledge, and some had heard of academic research locally. When given specific examples of the R&D undertaken in their local university, participants reacted very positively (See R&D and place chapter).

> "You know that the universities here are well respected, I think they were involved with the Higgs boson and stuff and Dolly the sheep and I mean these big scientific advances. They've got a reputation for it and yeah, it's not something that automatically comes to mind."
> **Male, 35-44, Edinburgh, C1, Depth interview**

Perceptions of the R&D workforce

The survey touched on public awareness of researchers' roles, finding that just over half (54%) disagreed with the statement "I don't really know what a researcher does", compared with 23% who agreed. It also looked at how trusted researchers were compared to other groups (see Trust chapter, page 48).

However, neither the survey nor focus groups explored perceptions of the R&D workforce – this was carried out in the in-depth interviews. The findings suggest a range of archetypes, most commonly in terms of levels of education as well those working in labs and technology or product development. Participants' first thoughts were overwhelmingly about STEMM researchers, referencing "geeks", statistics, engineers and lab scientists. Sentiment towards the R&D workforce is largely positive, although most struggled to see someone in R&D as being 'like them' or someone they know.

> "More probably like, not trying to be stereotypical, but very like geeky or you know, Google, computers, statistics, numbers, all that kind of thing. Probably like academics more than just a Joe Blogs, you know, working class. Someone who is well educated, you know?"
> **Male, 25-34, Belfast, C1, Depth interview**

In addition, participants did not have any clear sense of the scale of the R&D workforce. There was a belief that most commercial organisations doing product development will have an R&D function. Beyond this, there was no mention of the R&D workforce within universities without prompting, as noted earlier. The findings from the in-depth interviews aligns with CaSE's previous research that showed that the people, processes and places associated with R&D are opaque to many.

> "I just get the feeling that it's probably quite an important sector these days. I'd imagine nowadays it's probably all big companies or all big industries probably have quite a lot of R&D."
> **Male, 35-44, Edinburgh, C1, Depth interview**

Benefits of R&D

Key takeaways

- Less than a third could immediately think of lots of ways R&D benefits the UK (29%) or their region (22%), falling to just 18% when asked about their local area or them and their family.
- However, 80% said that it was at least somewhat important that R&D delivers benefits for them and their family.
- Only around four in ten (41%) said that R&D was relevant to their life, and just 29% said they feel connected with R&D.
- Around half (45%) said that R&D benefits some in the UK more than others, with the main beneficiaries seen to be the wealthy or elite and the private sector.
- Some 43% said that R&D happens much more in some areas of the UK than others, and 69% think that ensuring that R&D is spread evenly across the UK should be a Government priority.
- Two in three (67%) agreed R&D should be a tool to solve society's problems, but there was a disconnect between some of the public's highest priority issues and R&D's perceived role in addressing them.
- The intangibility of R&D's benefits is consistent with previous CaSE research, as is the finding that the public think R&D should be used as a tool to solve problems.

Recognition of benefits from R&D

The UK public struggle to immediately identify the benefits of R&D (Figure 8). While close to one in four (26%) said they could immediately think of 'lots of ways' that the UK benefits, more could only think of 'some ways' (42%) or could not immediately think of any (32%).

The survey suggests that the public find it relatively easier to identify benefits from R&D for the UK as a whole, and harder at a personal level. The proportion who said they could not immediately think of any ways that they or their family benefits was just over half (51%), while the proportion who could dropped to 18%.

The fact that just less than half (49%) said they could not immediately think of any personal or family benefits sits at odds with a strong desire for R&D to deliver personal benefits. In a separate question, four in five (80%) said it was 'very' or 'somewhat' important that R&D delivers benefits for "me and my family".

There are significant variations across sub-groups. Taking those who said they could immediately think of some ways R&D benefits them and their family, strong differences are evident for:

- Education (75% of post-graduates, compared with 36% of those with GCSE/O level)
- Socioeconomic group (65% of ABs compared with 38% of DEs)
- Age (64% of 18-44s compared with 35% of those aged 55+)
- Geographic region (67% in London compared with 42% in each of South West England, Eastern England, Yorkshire & Humberside and Scotland)
- Urbanity (60% among those in cities compared with 37% in rural areas)
- There is also a small – but statistically significant – difference by gender (53% or men compared with 46% of women)

There are clear differences by vote intention, with the identification of personal benefits higher among those intending to vote Labour (66%) and Conservative (55%), and lower among those intending to vote Reform (39%) and those not intending to vote (35%).

Local outlooks are also predictive. The most powerful correlation was by awareness of local R&D. Some 92% of those who said they knew a lot about R&D in their area said they could immediately think of ways they or their family benefit, compared with 38% of those who said they knew nothing or hardly anything about R&D in their area.

Benefits of R&D

There is also a strong correlation with how well respondents think their area is doing. Some 83% of those who described their area as "thriving" said they could recognise personal benefits, compared with 40% of those who said their area is doing badly or being left behind.

The qualitative research supports the survey findings. Many initially struggled to think of benefits and, where they did, it was often broad national benefits rather than local or personal ones. Medical advances featured strongly, alongside a general sentiment that R&D is "a good thing in principle" to ensure that the country keeps progressing.

> "I struggled to connect R&D to benefits felt by 'me' - I know what R&D is, but I could not relate it to my life."
> **Female, 25-34, Clacton, C1, Depth interview**

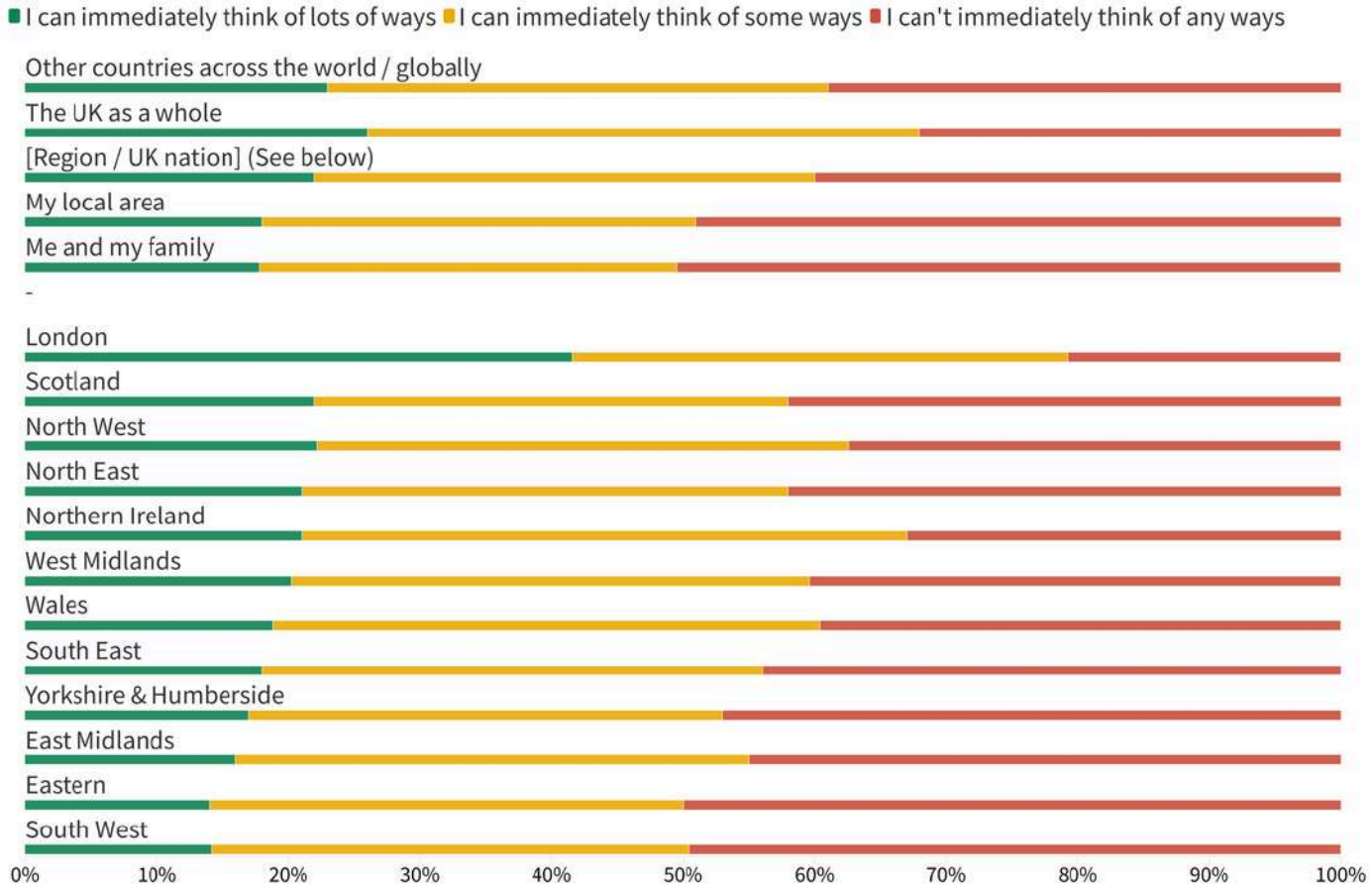
> "I think it's harder to think of R&D examples on a more local level."
> **Male, 25-34, Sutton/Croydon, AB, Indeemo**

> "Once I'd talked about medical benefits, I found it quite difficult to think of specific examples in other areas. I think the reason medical benefits comes to mind so easily is because it's almost the classic R&D scenario. Men in white coats in labs with test tubes."
> **Male, 55-64, Edinburgh, AB, Indeemo**

However, through the course of discussions, participants began to identify a range of benefits. This included, variously, those related to healthcare (such as medicines and hospital scans and procedures), health and wellbeing (healthier diets and plant-based foods), security (car safety and home security), consumer technology (mobile phones, smartwatches, Wi-Fi, Sky TV, apps, WhatsApp and air-friers) and AI (with ChatGPT named).

> "We had down [for R&D's benefits] home and car safety, medicines, improved entertainment, healthier diets, telecommunications and convenience."
> **Male, 65+, Edinburgh, AB, Focus group**

Figure 8: To what extent can the public think of ways that R&D benefits different people and parts of the UK?



Source: Deltapoll and Icaro polling for CaSE • July 2025
To what extent can you immediately think of ways that R&D activity undertaken in the UK benefits each of the following? n=8,000

Benefits of R&D

The link to consumer technology was not always a favourable one. Participants could relatively easily recognise how advancements in consumer technology had led to benefits in terms of convenience and speed. This was credited with making life easier and more convenient, but not necessarily better. This suggests that the link to deeper or longer-lasting benefits, such as improved happiness and wellbeing, is weaker or harder to imagine, which is likely driven by the stronger associations of R&D with technological developments like apps.

> We have all these products and services and apps and everything's really efficient now. But actually, are we more connected? Are we happier? Are we wealthier? And I think the answer a lot to a lot of those things is 'no'."
> **Male, 25-34, Sutton/Croydon, AB, Indeemo**

It became clear that personal benefits offer the highest pay off in terms of interest and engagement, with national benefits feeling more distant and disconnected from the public's daily life.

> "I think we as human beings are, you know, selfish. So, we very much want to see what is relevant to us, how it affects us, how it affects our family."
> **Female, 45-54, Taunton, AB, Indeemo**

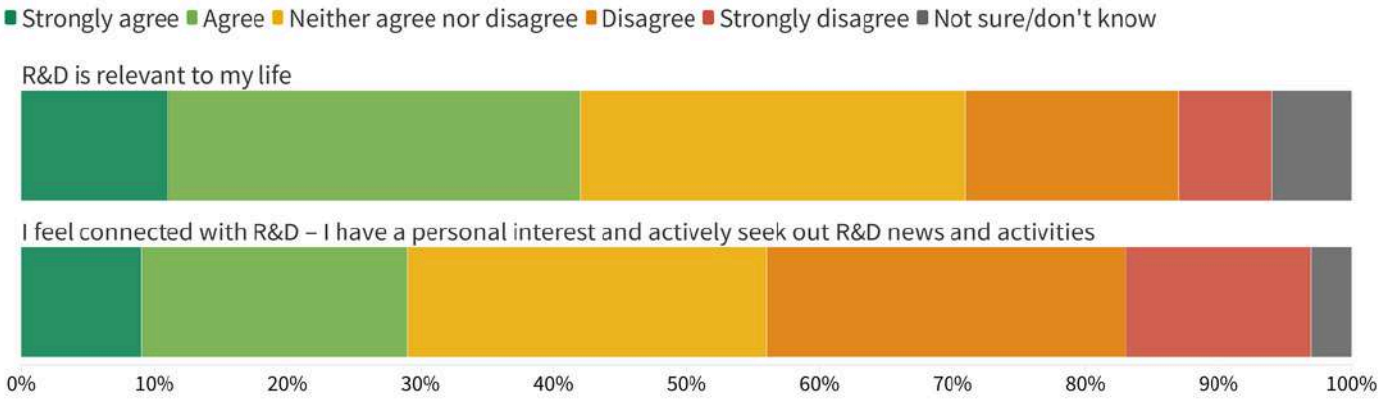
The benefits that gained the most traction in the focus groups were those linked to personal stories and experiences with a strong human or societal element. For example, one participant spoke about her interest in women's health since going through the menopause. A story from one of the participants in Cardiff about her newborn being saved by new cooling equipment was referred to by other participants in the follow up interviews as the thing they remembered most. These stories and experiences pivoted the discussions away from technology and towards social benefits.

> "My daughter had a really bad birth, but she had this cooling system immediately, and that's only been around for less than ten years. It takes the whole body down to a certain level to stop any damage to the brain. Her outcome would be so different [without that], she would be basically wheelchair bound, wouldn't be able to attend mainstream school."
> **Female, 35-44, Cardiff, C1, Focus group**

A lack of connection with R&D

Less than half of people (41%) said that R&D was relevant to their life, which broadly tracks the proportion of people who are spontaneously aware of R&D and can identify at least some personal benefits. Fewer still (29%) said they feel connected with R&D in the form of a personal interest or actively seeking out R&D news and activities (Figure 9).

Figure 9: How connected do the public feel with R&D and how relevant is it to them?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Do you agree or disagree with the following? R&D is relevant to my life / I feel connected with R&D – I have a personal interest and actively seek out R&D news and activities. n=8,000

Benefits of R&D

Focusing on feeling connected to R&D, there are significant variations across sub-groups according to gender (35% of men compared with 23% of women), age (51% of 25-34s and 41% of 35-44s, compared with 12% of those aged 65+), socioeconomic group (49% of ABs compared with 12% of DEs), highest level of formal education (61% of post-graduates compared with 13% with GCSE/O level) and urbanity (42% among those living in a city compared with 16% in a small town and 16% in a rural area). There are also observable differences by geographical region, with London significantly higher at 47% than any other region or nation.

Beyond demographics, differences by vote intention are evident. Those intending to vote Labour feel more connected, at 46%, compared with those intending to vote Reform (19%) and those who say they would not vote (13%).

There is a very strong correlation with knowledge about R&D happening in the local area. Some 83% of those who said they knew "a lot" about R&D in their area said they feel connected with R&D compared with 17% of those who said they knew nothing or hardly anything about local R&D.

This was mirrored in the focus groups, with most participants struggling to make connections. Those that found this easier tended to be participants whose personal circumstances (often medical) had brought them into contact with R&D.

> "We might talk about, I don't know, something like green energy or battery storage or something like that. But on a day-to-day level when I'm using electricity in my house, well, how does that make any difference day-to-day to, to me."
> **Male, 35-44, Cardiff, AB, Indeemo**

> "I don't think I do to be quite honest [feel connected to R&D]. It seems something that's not very directly influencing my life. It seems something that's sort of distant and disconnected from me."
> **Male, 35-44, Cardiff, C1, Indeemo**

Connections were harder to make for those who felt that R&D was a process that happened behind the scenes or behind closed doors, with some describing it as a process disconnected from real life. Indeed, most participants were less interested in R&D as a process and were much more focused on – and engaged by – the outcomes of R&D.

> "I feel like sometimes, it's quite disconnected from real life, so you might do a whole bunch of research and development or something, but it never actually becomes a product or a service."
> **Male, 35-44, Cardiff, AB, Focus group**

Factors that hinder recognition of the benefits of R&D

Focus groups demonstrated that participants were able to think of a range of benefits of R&D. However, they also highlighted issues that can obstruct the public's ability to emotionally or personally connect with R&D's benefits. These are described in more detail in the Investing in R&D chapter, and include hesitations around:

- The motivations of those carrying out R&D, which was primarily focused on profit-driven, private sector R&D. The natural default to think that private sector R&D focuses on developing consumer products and pharmaceuticals introduced questions around trust, transparency and research objectives.
- The time R&D takes, which can be seen as both too slow and too fast. Some expressed concerns about waiting "years and years" for developments like hydrogen boilers, while others talked about risks associated with the quick development of medicines, such as the Covid vaccine.
- The risks and failures associated with R&D. This included concerns about poor usage of R&D's outcomes, which can undermine the sense of benefits and promote a sense of financial waste. This was sometimes connected with wider failures of infrastructure rather than the R&D process itself.

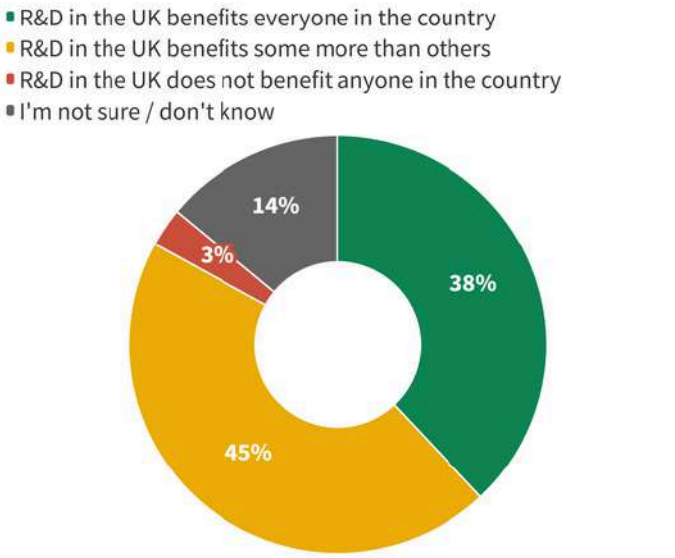
As described elsewhere in this chapter, the outcomes of R&D are better at capturing attention, which means that when R&D feels like a process happening behind closed doors, it is harder to connect with. This lack of awareness of the R&D process intersects with low knowledge of the people and places associated with R&D, as well as the breadth R&D itself. Additionally, some of the outputs of R&D are seen to yield superficial benefits, such as consumer technology, while deeper or more compelling benefits seem harder to imagine.

Benefits of R&D

Perceived inequality in R&D benefits

Almost two in five (38%) said that R&D in the UK benefits everyone, compared to a slightly higher proportion (45%) who said it benefits some more than others (Figure 10). Only a small proportion (3%) said R&D in the UK doesn't benefit anyone in the country, although a sizeable minority of one in seven (14%) said they are not sure.

Figure 10: Do the public think R&D benefits people in the country equally?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Which of the following statements is closest to your view about who in the UK benefits from Research & Development undertaken in the UK? n=8,000

While the view that R&D benefits some people in the UK more than others is consistent across sub-groups, it was more prominent in some. These include 18-24s (53%), those intending to vote Green (52%) and Reform (50%), and those in Yorkshire & Humberside (52%) and Scotland (50%). In addition, it was stronger among those who feel their local area is not doing well (50%), those living in smaller towns (49%) and those in socioeconomic groups C2DE (48%).

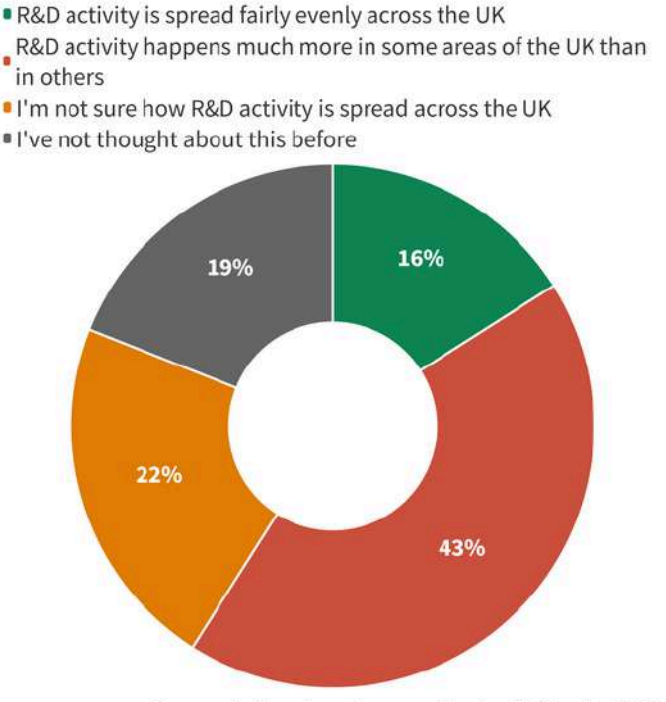
Those who said that some groups benefit more than others were asked to describe in their own words who they think benefits more. This showed two main perceived beneficiaries: the wealthy or elite (27%) and the private sector (21%). The latter tended to cover big business or corporations, technology companies and pharmaceutical companies. This was also evident in the focus groups, with a degree of perceived unfairness about how income and wealth affected the ability to access the beneficial outcomes or products of R&D, on both a personal and societal level.

> "There's a big divide of rich and poor, I think, and it's getting bigger and bigger. So, I think there are some bits that generally help everyone, but there's other parts that only really benefit some. Like electric cars, they're so expensive. Someone on a low income or minimum wage couldn't afford one. So that research and stuff is, is not really for them."
> **Male, 35-44, Sutton/Croydon, C1, Focus group**

Attitudes towards regional balance of R&D activity and "levelling up"

Turning to the perceived geographic distribution of R&D across the UK, a minority of around one in six (16%) said they think it is spread evenly across the country, compared to a much larger group (43%) who said that R&D happens much more in some areas of the UK (Figure 11). A similarly sized group (41%) said they were not sure or had never thought about it before. This increased to over half among those who say they would not vote (61%), those whose highest educational level is GCSE/O-Level (56%), those aged 65+ (52%) and those in socioeconomic group DE (52%).

Figure 11: How do the public think R&D is spread across the UK?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Thinking about your impression of how Research & Development activity is spread across different parts of the UK, which statement is closest to your view? n=8,000

Benefits of R&D

The qualitative research mirrored these findings. Some focus groups indicated an underlying sense of unfairness in the regional spread of R&D activity, but this felt more like a resigned acceptance of the way things are, as opposed to anger. For example, in the Middlesbrough group there was consensus that the North East is neglected and that - even within the North East – Middlesbrough is neglected relative to Newcastle. London was regularly mentioned as a centre of R&D, alongside Oxford and Cambridge. However, there were examples of pride in local R&D strengths, with those in Nottingham, Edinburgh and Belfast viewing their local universities as world leading.

While this research did not detect latent anger at perceived regional disparities, it found that redressing the balance would be viewed favourably by many. Close to seven in ten (69%) said it should be a priority for the Government to ensure that R&D activity is spread evenly (or "levelled up") across the UK, while around one in five (19%) said it should be a lower priority or not a priority at all (Figure 12).

This appetite for levelling up R&D activity was seen across sub-groups, but was highest among 18-34 men (82%), those intending to vote Labour (82%), those with young children aged 0-10 (81%), those aged 25-34s (79%) and those in North West England (76%).

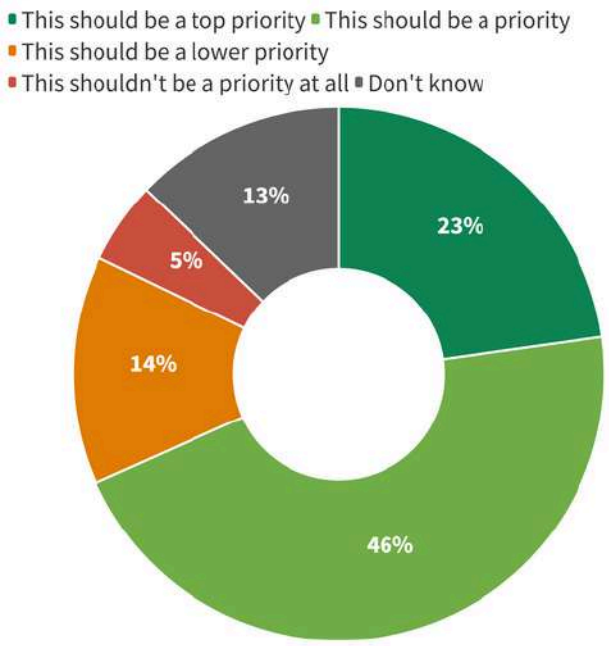
Mirroring the survey, the dominant view in the focus groups was that a more equal regional spread of R&D activity would be a good thing and potentially benefit them personally. By contrast, some were less concerned about where R&D takes place so long as it does, but – just as in the survey – this was a minority view.

> "I think sometimes it can be very easy to feel as though it [the region/city] is left behind because you usually see such research and development being pumped into bigger cities like London or Manchester. You don't really hear much of this happening in Nottingham, so I think I would definitely feel encouraged [by more investment in R&D locally]."
> **Female, 18-24, Nottingham, C1, Indeemo**

R&D's role in addressing societal problems

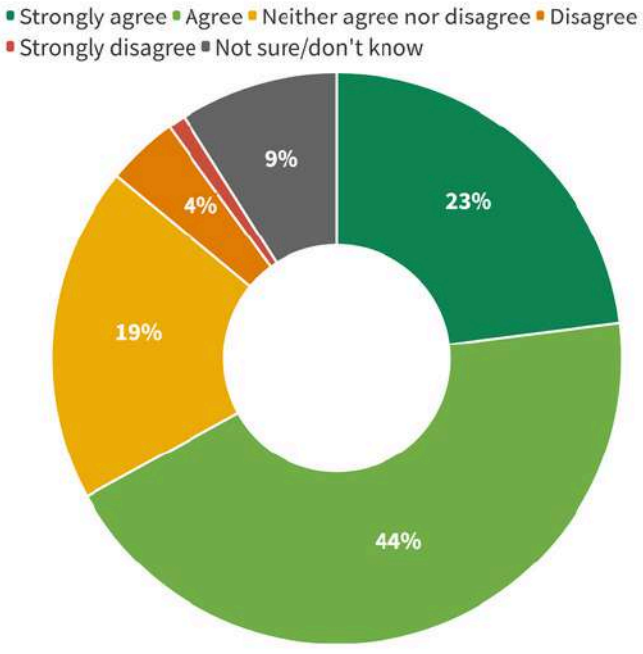
Two in three (67%) agreed with the statement "The Government should use R&D as a tool to solve society's problems" (Figure 13). Only a small minority of one in 2-20 (5%) disagreed, although a larger minority took a neutral position (19%) or said they were not sure/don't know (9%).

Figure 12: Do the public think the Government should prioritise ensuring that R&D activity is spread across the UK?



Source: Deltapoll and Icaro polling for CaSE • July 2025
How much of a priority should it be for Government to ensure that R&D activity is spread evenly (or "levelled up") across the UK? n=8,000

Figure 13: Do the public think the Government should use R&D as a tool?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Do you agree or disagree with the following statements. The Government should use R&D as a tool to solve society's problems. n=8,000

Benefits of R&D

This view is broadly consistent, with a majority in agreement across all sub-groups. Nonetheless, some cohorts were much more likely to agree, including by:

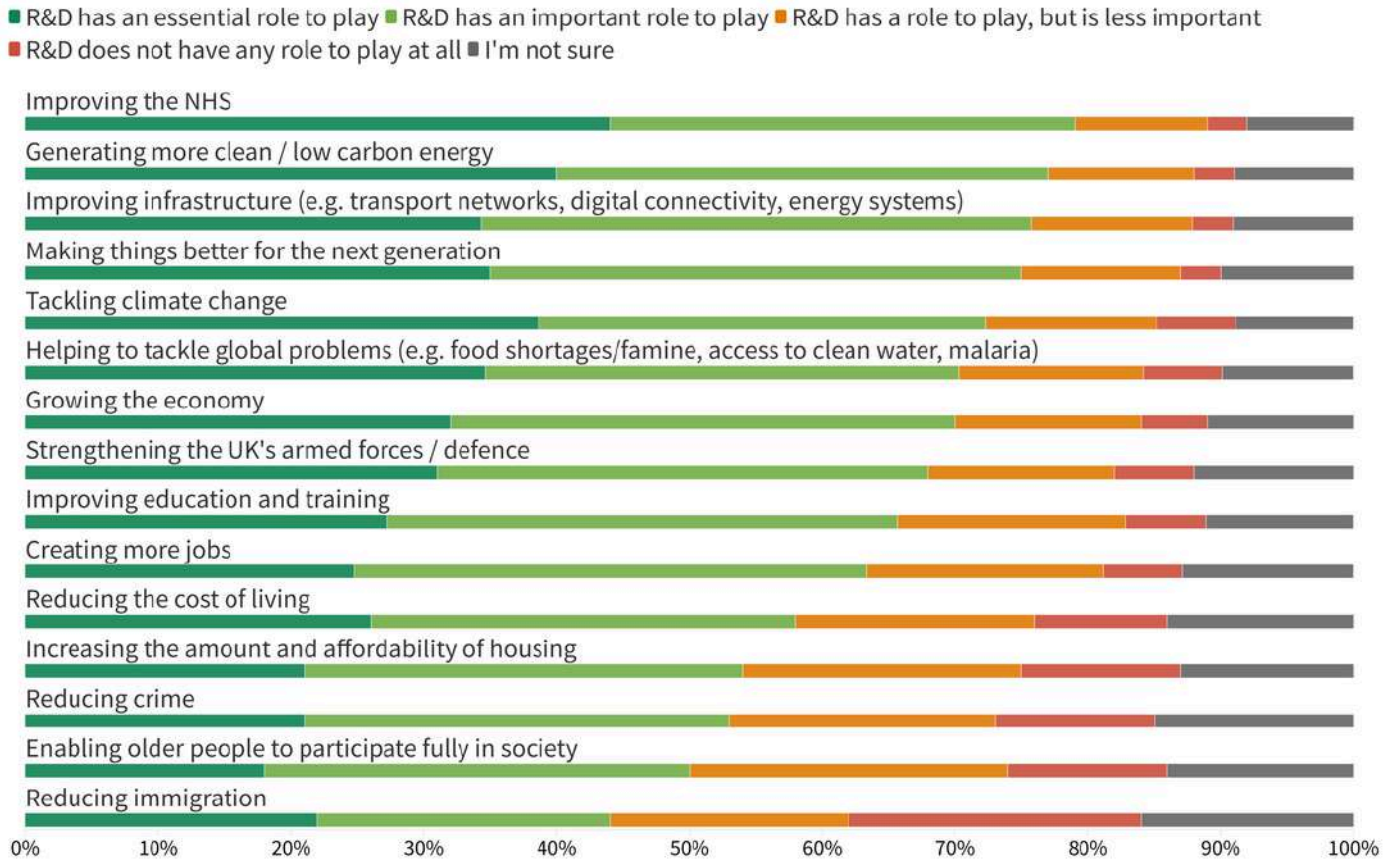
- Age (81% of 25-34s and 74% of 35-44s agreed, compared with 56% of those aged 65+)
- Children at home (81% of those with children aged 0-10 compared with 62% without children)
- Socioeconomic group (77% among ABs compared with 56% of DEs)
- Highest educational level (82% among post-graduates compared with 57% among those with GCSE/O-Level)
- Urbanity (72% among those in cities compared with those in smaller towns and rural areas (both 59%))
- There is a small, but statistically significant, difference by gender (70% among men compared with 63% among women)

There are also differences by vote intention, with agreement highest among those who intend to vote Labour (78%) and Green (76%), and lowest among those who say they won't vote (50%).

Local outlooks are again a strong predictor, with very strong correlation by awareness of R&D happening locally (91% of those who said they knew "a lot" about R&D in their area agreed that it should be used to solve society's problems, compared with 61% of those who said they knew hardly anything or nothing), and how well they think their area is doing (87% of those who said their area is "thriving" compared with 62% who said their area is doing badly or being left behind).

Additionally, a majority believed that R&D has an important or essential role to play in tackling most of the range of societal challenges tested. This included improving the NHS (79%), generating more clean or low carbon energy (77%), improving infrastructure (76%) and tackling climate change (73%) (Figure 14).

Figure 14: Do the public think R&D is important in addressing societal challenges?



Source: Deltapoll and Icaro polling for CaSE • July 2025
How much of a role do you think Research & Development has in addressing each of these issues in the UK? n=8,000

Benefits of R&D

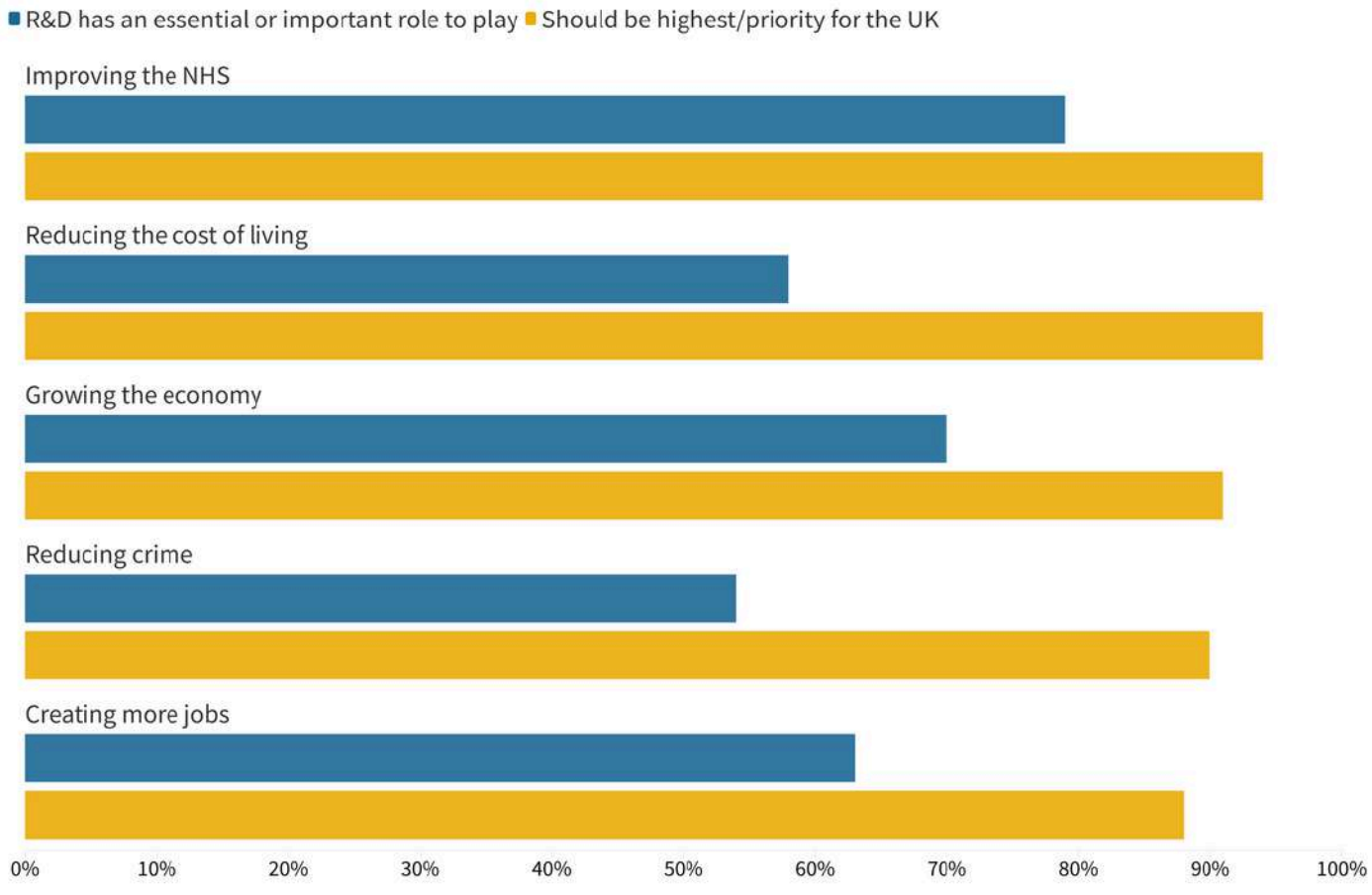
However, the survey identified a disconnect with some of the public's key priorities, as identified earlier in the survey (see Priorities and outlooks chapter), and their perception of R&D's role in delivering them (Figure 15). For example, 94% identified reducing the cost of living as a key priority, but only 58% said that R&D had an essential or important role to play in addressing it. Similar trends are evident for reducing crime (90% compared with 54%) and creating jobs (88% compared with 63%). The gap was narrower for improving the NHS (94% compared with 79%).

The focus groups mirrored these findings. There was sometimes a tension between the value of more R&D on a subject compared with the demand to see the problem solved quickly. For instance, for daily irritations like potholes or dog-fouling, there was a sense that the solutions were known and needed to be implemented. For other issues, such as homelessness, mental health and crime, some felt enough 'research' had already been done and the application of solutions was needed.

> "I'd say the solutions to those problems are fairly easy. There's not anything that the local authorities haven't done before, you know. We're not sending a man to the moon. We don't need research and development to tell us to fill the potholes and get the homeless off the streets, to be really blunt."
> **Male, 35-44, Cardiff, C1, Focus group**

Participants were most engaged with R&D when it was either seen to be capable of delivering personal benefits or addressing the societal issues they cared about. This connection was relatively easy to make for improving the NHS, as well as green technologies, improvements to infrastructure and making things better for future generations. However, it was more difficult to conceptualise an R&D solution to issues such as crime, immigration, the cost of living and availability and affordability of housing. This was not without trying, and some participants did note things they had heard about these issues, such as AI and policing.

Figure 15: How much of a role do the public think R&D has in addressing high priority issues?



Source: Deltapoll and Icaro polling for CaSE • July 2025
How much of a priority do you think the following should be for the UK? / How much of a role do you think Research & Development has in addressing each of these issues in the UK? n=8,000

Benefits of R&D

> "I wanted to make a point of using AI in policing, which is new research and development. They're looking to use AI models to guide the police on what to do in regard to crimes going on in certain areas."
> **Male, 45-54, Cardiff, AB, Focus group**

There was a disconnect around R&D's potential to generate economic growth. In the survey, this was a priority for 91%, while 70% said that R&D had an essential or important role to play. In the focus groups, there was broad acceptance of the idea that R&D can deliver economic benefits, such as economic growth and job creation (which generally aligns with other public opinion polling CaSE has commissioned). However, this link risks being undermined by the current reality of weak growth and general sense of decline, along with the disconnect on the related issue of cost of living described earlier.

> "I don't think it [investment in R&D] has [benefitted the economy]. Because we're not growing. Like, the last quarter was zero growth. So thinking about it, we're not actually seeing the benefits [of R&D] economically."
> **Female, 35-44, Cardiff, C1, Focus group**

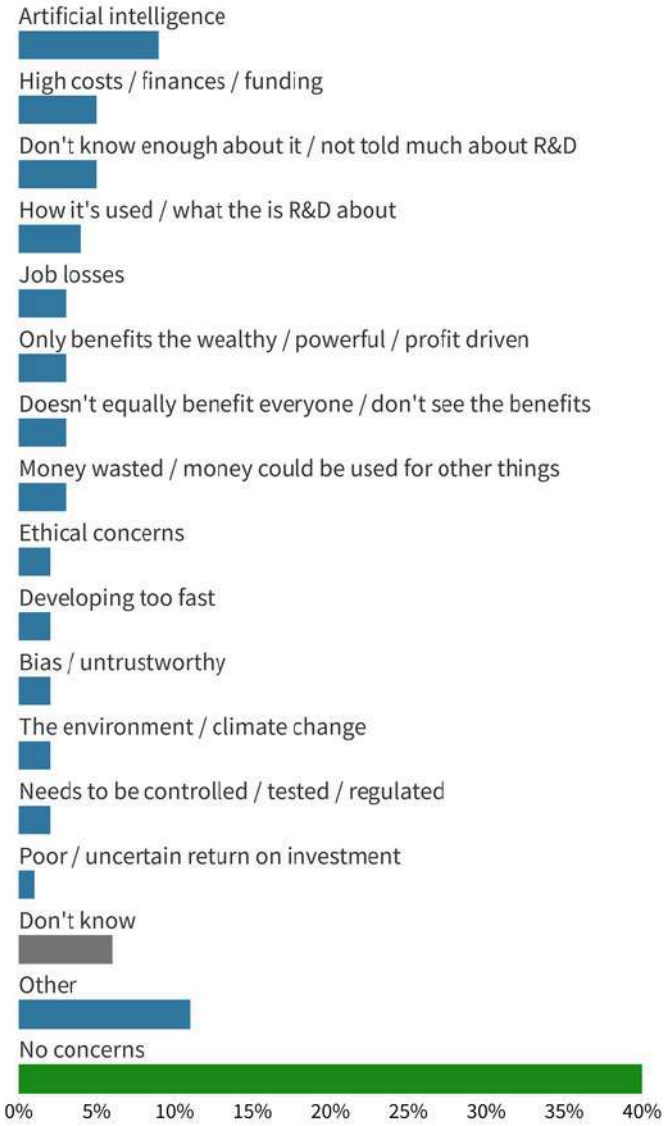
Notably, the focus group discussions about the link between R&D's benefits and societal challenges prompted some participants to look for answers in their own time. At the in-depth interviews, carried out the week after the focus groups, one participant set out his findings about R&D that was supporting first responders, which was an important issue for him.

> "One of the things that we [in the group] reckoned should have funding for R&D was first responders. And I had a look online and I was checking out what kind of funding first responders are getting. And it turns out there's nearly 80 billion in funding now in first response and R&D, one of which was something called DIAB - drone in a box. They reckon it will cut down response time by 87%. This is an exciting development."
> **Male, 45-54, Clacton, C2, Indeemo**

Concerns about R&D

The survey asked an open-ended question about any concerns that people had about R&D, allowing respondents to outline them in their own words. The most common answer – among two in five (40%) – was "no concerns" (Figure 16). However, others did raise a range of issues, most commonly related to AI, which was mentioned by 9%. This was followed by the costs of undertaking R&D (5%). We also again noted concerns about technology, which were described in the Priorities and outlooks chapter, where just over half (52%) said that technology is moving too fast.

Figure 16: What are the public's concerns about R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Now we'd like to ask you about any concerns that you have about Research & Development (e.g. negative impacts on society, or concerns about a particular type of R&D, etc). What concerns, if any, do you have about R&D? Open-ended responses. n=8,000

Benefits of R&D

The qualitative research in part substantiates these findings, as well as providing more depth and granularity. A recurring theme in the discussions was about AI, which is recognised as offering time and efficiency savings (such as in writing emails or rapid internet searchers) – these landed moderately well but are considered somewhat emotionally cold advances. Some participants expressed deeper and more emotionally charged concerns about the potential for job losses, the trustworthiness and veracity of social media or news content, and a loss of human interaction.

AI, and technology more broadly, were perceived much more positively when related to applications with a human benefit. This included the ability of AI to review medical scans with greater accuracy, to help the NHS make efficiency savings, or their potential to improve the delivery of public services.

> "If you can find ways to use AI to help improve the delivery of public services, then that would be great."
> **Male, 45-54, Croydon, AB, Depth interview**

> "Not many are talking about this, but in 5-10 years most of us going to be unemployed [because of AI]."
> **Male, 45-54, Edinburgh, DE, Focus group**

While not a key theme in either the survey or focus groups, some participants had an underlying unease about the potential for R&D to be used for negative purposes. For example, in focus group discussions about investment (see Investing in R&D chapter) some were reticent about more R&D funding for military and defence on the grounds that it could be used in warfare. This view tended to be held by those intending to vote for centre left parties. Others were open to technological solutions to issues such as crime or immigration, but cautious about the wider implications for civil liberties.

> "I think that [the CaSE definition of R&D] should say "ethical research and development," because weapons research and development doesn't align with anything that says there."
> **Male, 45-54, Cardiff, AB, Focus group**

R&D and place

Key takeaways

- A majority of around seven in ten said they feel a connection to each of their area, their town or city and UK region.
- Almost three quarters (74%) said they knew hardly anything or nothing about R&D in their local area, but 70% agreed they would like to hear more.
- In focus groups, few could give examples of local R&D, but when provided they were well received by a strong majority.
- More than four in five (83%) could identify potential benefits from more local R&D activity, most notably growing the local economy, creating more opportunities for young people in the area and bringing well paid jobs.
- Some 56% would support a new R&D laboratory in their local area, while 68% would support a new science museum or discovery centre. In focus groups, participants demonstrated a genuine appetite and excitement for both.
- Just 17% think that the UK is a world leader in R&D, but 46% said that this should be the UK's aim.
- These findings support previous CaSE research that place is a strong connection point. Responses on local awareness, appetite and perceived benefits of local R&D are very similar, although support for an R&D lab being built in their area has dropped slightly.

Connections to place

A majority of around seven in ten expressed a connection to areas close to them, which was seen equally across their immediate local area (72%), their city/town (72%) and their region or devolved UK nation (72%) (Figure 17). A majority also feel a connection to the UK, although this is slightly weaker (64%).

There are strong regional differences in the public's connection to their English region or UK devolved nation. The highest connection at this level was felt in Scotland (88%), followed by North East England (83%), Wales (82%), London (79%), Northern Ireland (78%), Yorkshire and Humberside (74%) and North West England (74%). Connections were weaker in South East England (67%), the Eastern region of England (64%) and – most notably – the East Midlands (57%).

The sub-groups who felt most connected to their region or devolved nation were those who intend to vote Labour (81%), those with children aged 0-10 at home (79%), 25-34s (78%) and those living in a city (77%). The groups who felt the least connection were 18-24s (63%) and those who would not vote (57%).

Notably, there was a significant difference between the public's sense of connection to place and the connection they feel to R&D. As reported in the Benefits to R&D chapter, just 29% said they felt a connection to R&D, significantly less than the 72% who stated at least a fairly strong connection with their city or town. The R&D sector could use these strong local links as an opportunity to strengthen the connection with the public.

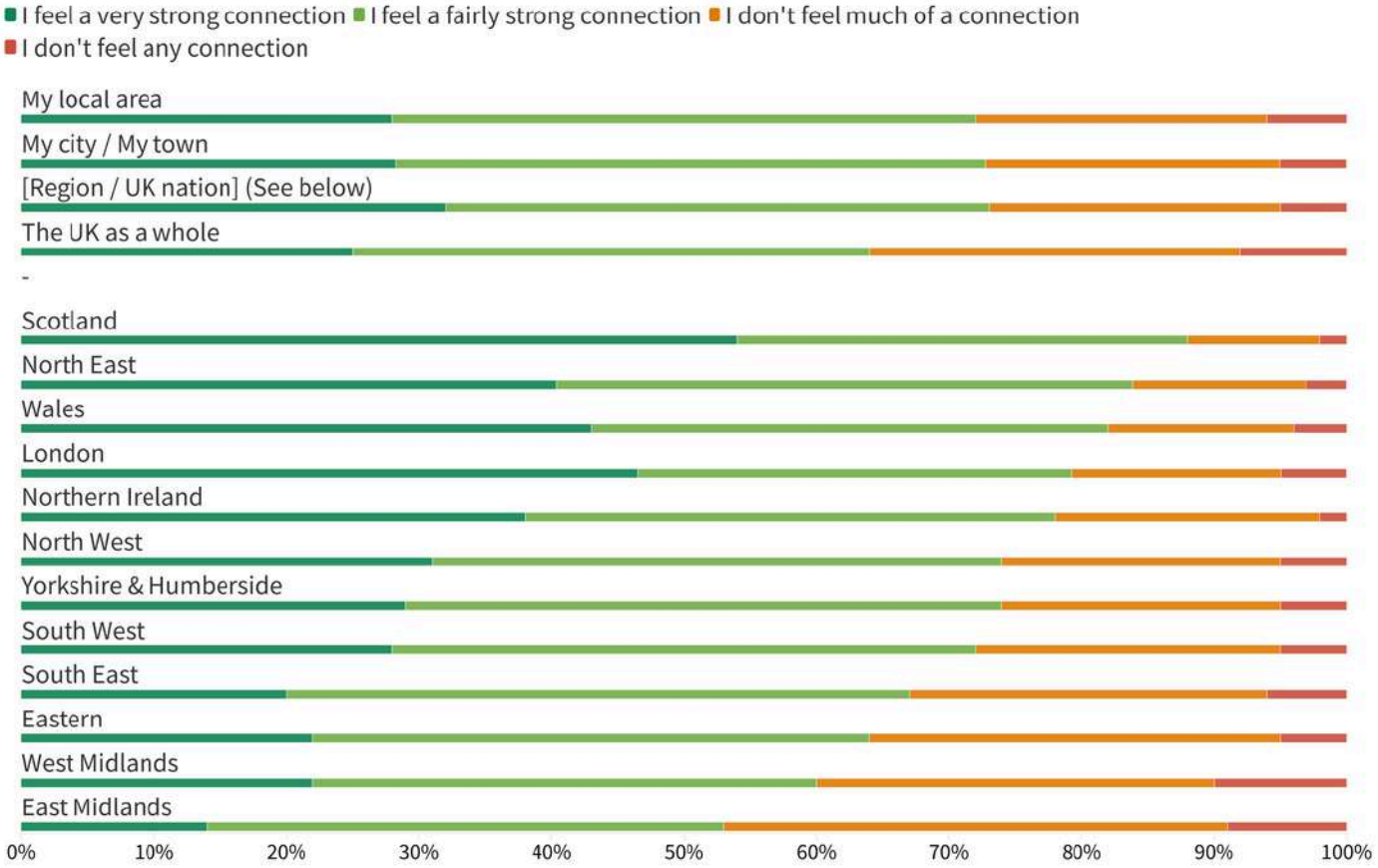
Awareness of R&D activity locally

Very few said they knew much about R&D happening in their area (Figure 18). Only around one in 14 (7%) said they knew a lot, and a further one in five (20%) said they knew a little. By contrast, almost three quarters (74%) said they knew hardly anything or nothing about R&D undertaken locally. However, there were corresponding levels of appetite for more information, with 70% agreeing that they would like to hear from researchers about the R&D happening in their area. (This is discussed in more detail in the Engagement and involvement in R&D chapter). Both figures are broadly in line with questions from previous CaSE research.

The extent to which people know about R&D in their local area produces one of the strongest correlations in the survey. Those with more stated awareness are consistently more supportive of R&D, perceive more benefits from R&D and are more receptive to the case for more R&D investment.

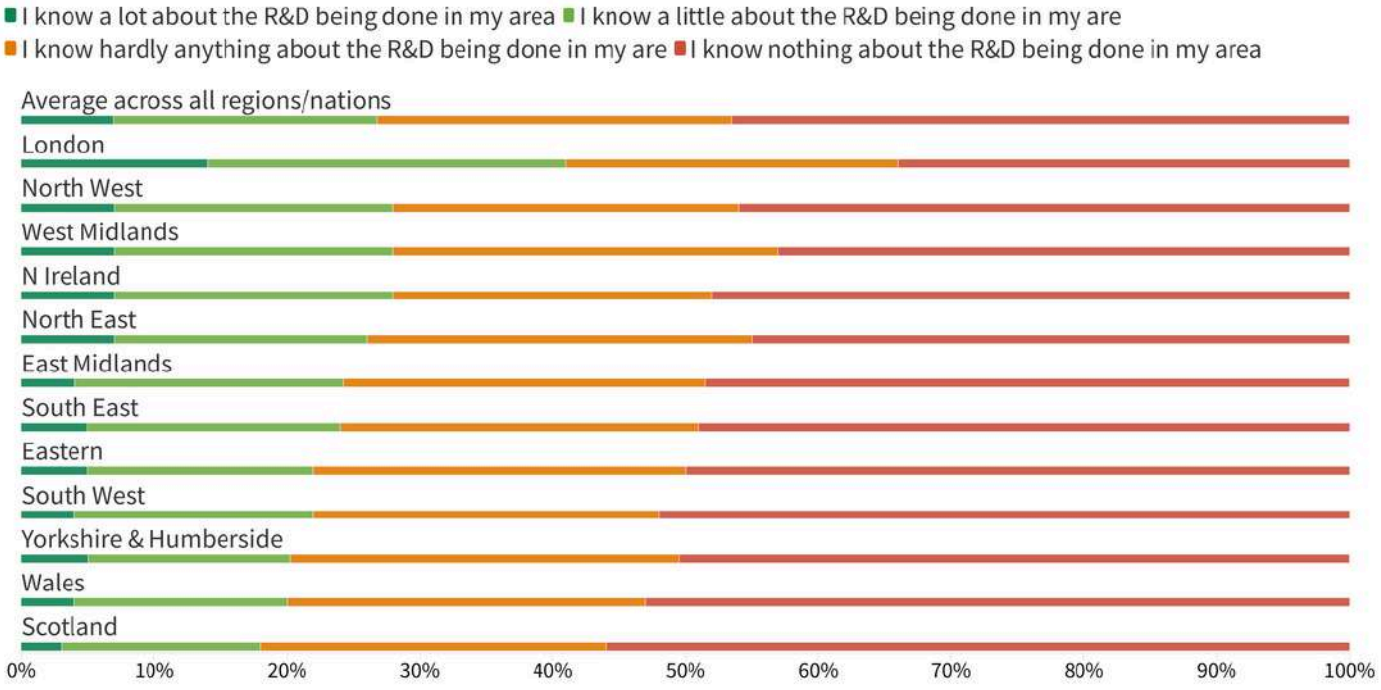
R&D and place

Figure 17: How much of a connection do the public feel with different areas?



Source: Deltapoll and Icaro polling for CaSE • July 2025
How much of a connection do you feel with each of the following? n=8,000

Figure 18: How much do the public know about R&D in their area?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Which one of the following statements fits best with your view about how much you know about the Research & Development being done in your area?
n=8,000

R&D and place

There are strong trends in stated knowledge of local R&D across sub-groups, although the proportion who were aware of R&D locally remains in a minority in most cases, with only two exceptions. Differences are evident by:

- Gender (31% of men said they know a lot or a little about R&D in their area compared with 21% of women)
- Age (18-24s (34%), 25-34s (48%) and 35-44s (35%) compared with 11% of those aged 65+)
- Education (52% of post-graduates compared with 14% of those with GCSE/O-Level)
- Region (41% in London and 28% in each of the West Midlands and North West England compared with 19% in Scotland and 20% in Wales), socioeconomic group (41% of ABs compared with 15% of DEs)
- Urbanity (38% of those in cities compared with 14% in rural areas).

There are also variations according to vote intention, with awareness higher among those who intend to vote for Labour or Conservative (43% and 29%, respectively) and lower for those who intend to vote Reform (17%) and those who say they would not vote (14%).

There was a strong correlation with the sense of connection to place, with awareness higher among those who feel a connection to their local area (42%) and lower among those who feel no connection (10%). Similarly, there is a correlation with how well the local area is doing, with awareness of R&D locally increasing to 68% among those who said their area was "thriving" and 37% among those who said it was doing "fairly well", compared with 15% among those who said it was doing badly or left behind.

The qualitative research largely mirrored the survey findings, with very few participants able to spontaneously mention specific examples of R&D in their local area. The only examples included the development of a tram (Sutton/Croydon), improvements in NHS treatments in hospitals (multiple groups), biomedical clusters (Edinburgh) and the Techniquest Discovery Centre (Cardiff).

In each group, two local R&D case studies were shown to participants to help develop the conversation and gauge reactions. None of the examples were mentioned by participants before they were shown, although there was some vague awareness once they were shared. For instance, some participants knew someone who worked there, without having associated it as a R&D activity, while others noted that they regularly drove by the site, without knowing what it did.

The examples were, in most cases, very positively received. There was often surprise that so much R&D activity was happening at the local university or hospital, which helped evidence the idea that these institutions undertake R&D (which participants had previously not associated with R&D – see the Awareness and understanding of R&D chapter). It was notable that the examples most well received were those related to things that people supported (recycling) or felt were tackling important issues (crime and drugs), as well as those that made links to job creation.

> "When we talked about the Wilton site with the recycling and things that were going on in Teesside University, I didn't realise things like that were happening because it's not easy to access that knowledge. So, knowing that that's there and that that would be used more locally for us, that was interesting to know."
> **Female, 35-44, Middlesbrough, C1, Depth interview**

Participants felt that learning about local examples was a good way of engaging them, and others, with R&D, with some expressing pride and greater interest in knowing about what was happening in their area, region or nation rather than the UK as a whole.

> *[Would you be more excited to find out about R&D in Northern Ireland than the UK as a whole?]* "I think, selfishly, just Northern Ireland because that's, you know, that's where my life is, where my, my child is going to grow up, you know, for his future. As I was saying, I don't live in the mainland so it doesn't affect me."
> **Male, 25-34, Belfast, C1, Depth interview**

It is important to note that some of the case studies did not land as well. The London South Bank University (LSBU) campus in Croydon felt too removed as LSBU's main site is in central London, and participants felt the focus was mainly education. And for some – but importantly not all – participants in Edinburgh, the examples, which focused on construction materials and dentistry, lacked appeal.

While the description of the case studies was brief, some reactions to the language were informative. Phrases such as "world's first" immediately caught participants' attention, while terms like "social science" were not well understood.

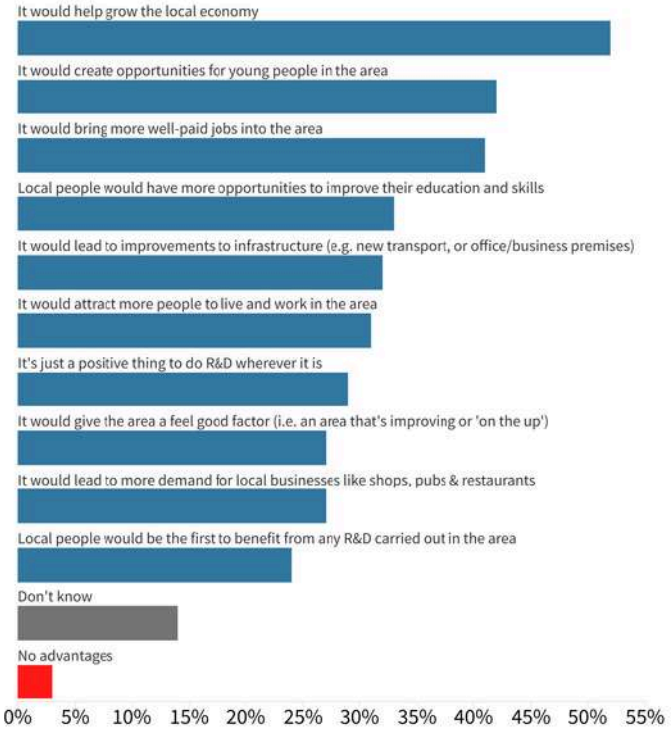
R&D and place

Perceived benefits and disbenefits of more R&D locally

More than four in five (83%) could identify potential advantages from more R&D being undertaken in their local area (Figure 19). These advantages were led by growing the local economy (selected by 52%), creating more opportunities for young people in the area (42%) and bringing well paid jobs (41%). Only 3% said there would be no advantages, while one in seven (14%) were not sure.

Reflecting the sub-group differences noted previously, the groups most likely to perceive benefits were those in socioeconomic group AB, those with postgraduate qualifications, those with children, those living in larger urban areas, those who feel connected to their area and those who think the area is doing well. By contrast, there was a higher 'not sure' response among those in socioeconomic group DE, those whose highest educational qualification is GCSE/O-Level, those intending to vote Reform and those who say they would not vote, those who do not feel connected to their area and those who think their area is not doing well.

Figure 19: What do the public think are the advantages of having more R&D locally?



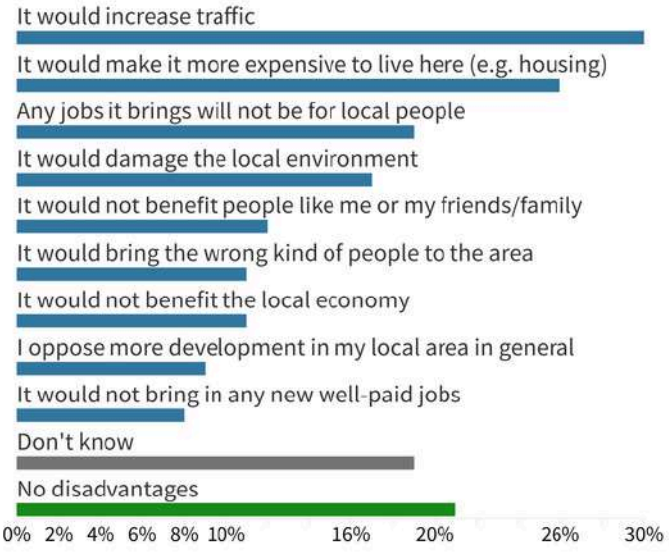
Source: Deltapoll and Icaro polling for CaSE • July 2025
Which of the following, if any, do you think of as advantages of having more Research & Development carried out in your area? Select all that apply. n=8,000

The qualitative work agreed with the survey, with economic benefits and more jobs being recurring themes in the discussions, although there was some doubt about whether the jobs would be for local people. Some of the more sophisticated conceptualisations were around the potential multiplier effects of local R&D, along with partnerships between companies and universities to create R&D hubs.

> "I'd love to see that sort of thing [an R&D lab] come to Cardiff. I think it would really help sort of invigorate the local economy. It would bring quality jobs to the area as well. I think that could have a sort of a magnet effect for other companies wanting to come into the area as well and build partnerships. I think it would attract government investment as well and investment from R&D institutions."
> **Male, 35-44, Cardiff, C1, Indeemo**

Turning to disadvantages (Figure 20), when presented with a list in the survey, three in five (60%) identify some potential disbenefits associated with more R&D locally. The most frequently selected were traffic (30%), increasing the cost of living/housing prices (26%) and doubts about whether new jobs would be for local people (19%). However, 21% said they could think of no disadvantages, while 19% selected 'don't know'. Some sub-groups were more likely to identify disadvantages, including 18-24s, those in rural areas, those who feel their area is not doing well, and those who intend to vote Reform.

Figure 20: What do the public think are the disadvantages of having more R&D locally?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Which of the following, if any, do you think of as disadvantages of having more Research & Development carried out in your area? Select all that apply. n=8,000

R&D and place

The qualitative research agreed to some extent with the survey, although the disadvantages of local R&D were not recurrent themes. Discussions mostly focused on ensuring there was a clear local benefit from any R&D investment, rather than mitigating a disbenefit. There were some concerns about a potential divide between existing local residents and new residents who might be following the jobs created by new R&D activity locally.

Support for different kinds of R&D locally

Just over half (56%) said they would support a new R&D laboratory in their local area, compared with just one in ten (10%) who would oppose it (Figure 21). A large group of one in four (25%) would neither support nor oppose, while close to one in ten (9%) selected not sure or don't know.

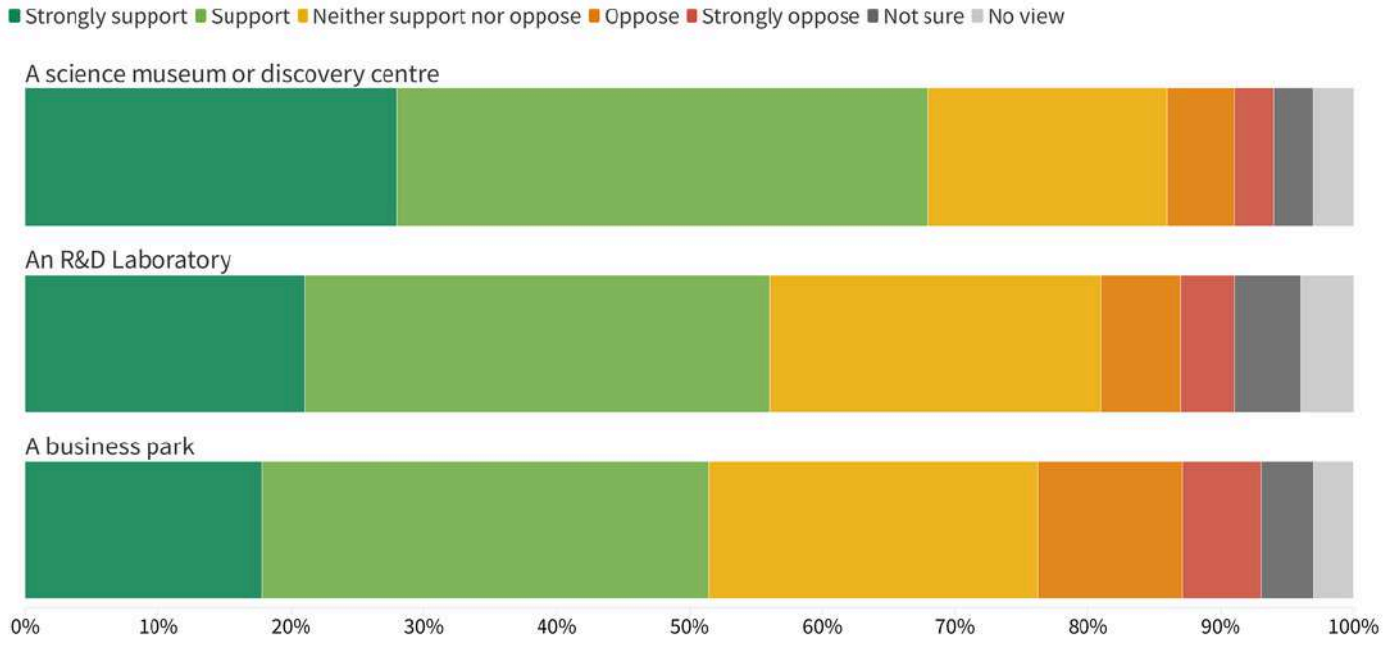
Previous CaSE research has asked this question in different ways and has always seen majority support, although we do note a change compared with February 2023 polling, when 66% supported and 6% opposed an R&D lab being built locally.

In this survey, support for an R&D lab is not dissimilar to support for a new business park (52%), although this option provokes more opposition (17%). The most supported option is a new science museum or discovery centre, where close to two in three (68%) would support this compared to just 7% would oppose it.

There are pronounced differences among sub-groups. For the new R&D laboratory, strongest correlations are:

- Gender (65% of men would support a new R&D laboratory compared with 49% of women)
- Age (support was highest among 25-34s (66%) and 35-44s (60%))
- Geographic region (support was highest in London at 65%)
- Socioeconomic group (72% of AB compared with 44% of DE)
- Highest education qualification (75% among post-graduates compared with 44% of those with GCSE/O-Level)
- Urbanity (63% of those living in a city compared with 44% of those in rural areas)
- Having children at home (support was highest among those with children aged 0-10 at 68%)

Figure 21: Do the public support the building of new R&D facilities locally?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Would you support or oppose each of the following being built in your area? n=8,000

R&D and place

There are significant differences according to vote intention. Support for an R&D laboratory is highest among those who intend to vote Labour (71%), Conservative (63%) or Liberal Democrat (61%), and lower among those intending to vote Reform (50%) and those who say they would not vote (35%).

There are also strong correlations between support and outlooks toward the local area, including how connected people feel to the local area (69% support among those who feel connected compared with 35% who do not); how well they think the local area is doing (81% support among those who think the area is "thriving" compared with 53% who think it is not doing well); and knowledge of R&D locally (83% support among those who knew a lot compared with 50% among those who knew nothing or hardly anything).

The trends are similar for a new science museum or discovery centre, but notably the gender trend disappears, with women being as supportive as men. Other trends remain but are less stark. It remains the case that those who feel connected with their area, those who think the area is doing well, and those who know about local R&D are significantly more supportive than those who do not. This nexus of local issues is very strongly correlated with levels of support for more R&D.

The qualitative research mirrored the survey findings. Not only did both the R&D laboratory and a science museum or discovery centre receive high levels of support in all eight locations, participants demonstrated genuine appetite and excitement at the prospect.

Discussions focused on the differing objectives of each type of institution and the employment opportunities they offered. For the former, participants identified the aim of education and engagement in a discovery centre compared with R&D advancement and cutting edge research in a lab. For the latter, a lab was expected to provide highly skilled jobs, compared with what were perceived as lower skilled jobs in a discovery centre.

The main concerns expressed about a lab were aesthetics (what would the building look like), transparency (about what activities would be undertaken, and for what aim) and the fact that it would feel 'closed' to the community.

> "So, I think having more R&D taking place in my area would be great. It's more jobs, not just directly for the R&D place, like offices or whatever they are, but also all the support roles that you get with offices like this. I think it's good for high skilled jobs, which are always sought after."
> **Male, 35-44, Cardiff, AB, Indeemo**

> "I think if more research and development happened in my local area, it would definitely be something that I welcome. I think that the idea of a sort of science museum or a discovery centre feels different to a lab. When I think of a lab, it immediately makes me think of a building that I would never go to or be allowed to go to. Rather than actually being open and being kind of immersive and providing a public experience."
> **Male, 25-34, Sutton/Croydon, AB, Indeemo**

UK R&D on the global stage

When asked about perceptions of the UK's current performance in R&D against other major economies, the survey demonstrated three differing perspectives (Figure 22). The first is a perception that the UK is either a world leader in R&D (17%) or is keeping pace but not leading (37%), which collectively accounts for just over half of UK adults (54%). By contrast, close to one in four (24%) think the UK has fallen behind in R&D, and a similar proportion (22%) are not sure.

There is more consensus when asked what the UK's aspiration for R&D should be: four in five (81%) think the UK should aim to be either a world leader or keep pace with other major economies. Compared with the proportion who said the UK was a world leader (17%), almost half (46%) said that it should be. Only 3% said the UK should focus less on R&D.

When looking at perceptions of the UK's current performance, demographic differences are evident but relatively weak. For example, those aged 55+ were more likely to think the UK has fallen behind in R&D (27% compared with 20% of 18-34s), but the differences – while statistically significant – are minor.

R&D and place

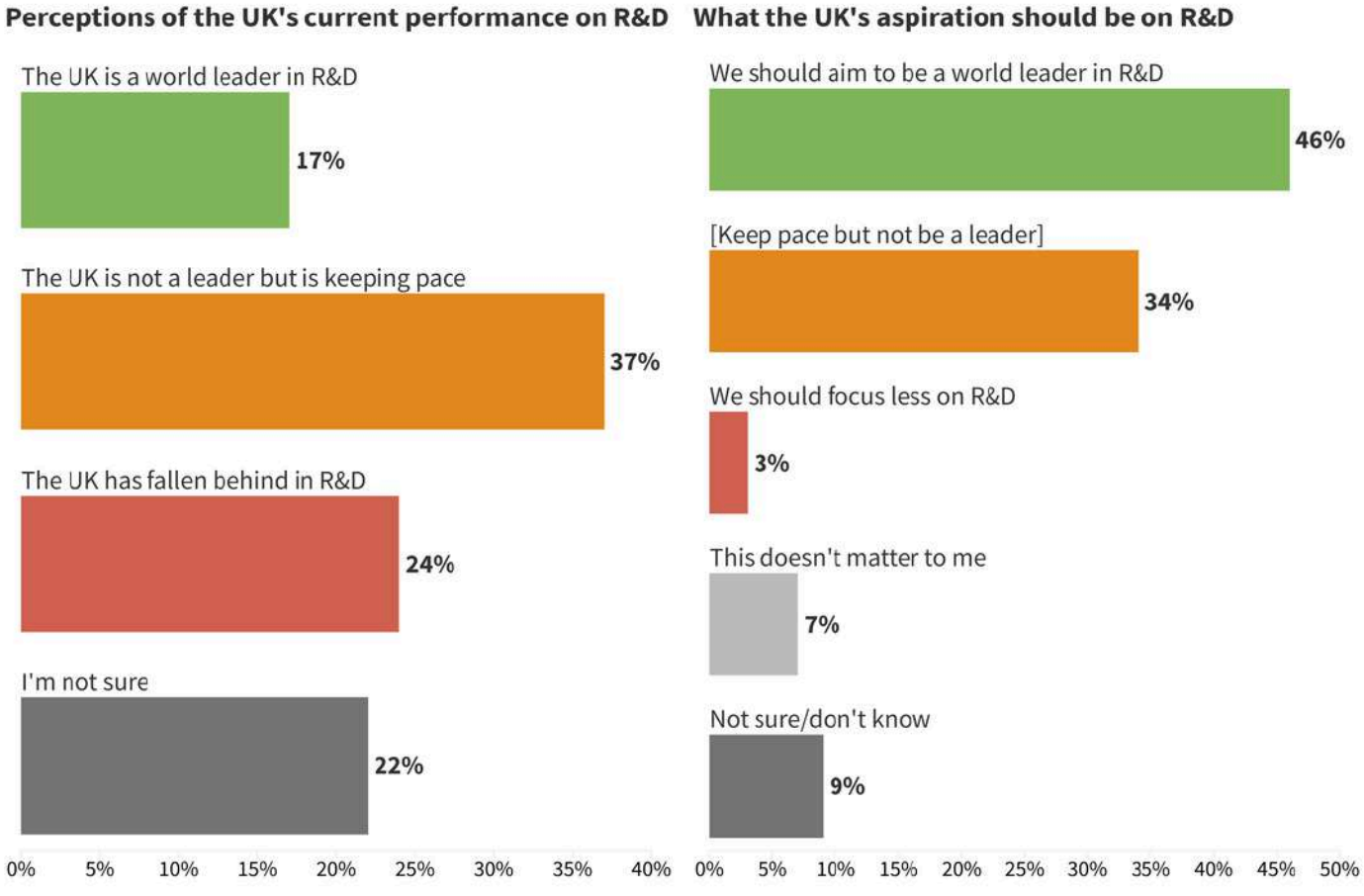
Stronger differences are apparent according to vote intention, with those intending to vote Reform being more likely to think the UK has fallen behind (34% compared with 15% of those who intend to vote Labour). The same is true for perceptions of how well the local area is doing. Among those who think their area is not doing well, 39% said the UK has fallen behind in R&D (compared with 15% who think their area is doing well).

There are stronger differences when looking at the UK's aspiration for R&D in future, most notably according to age (55% of 25-34s said the UK should aim to be a world leader compared with 38% of 18-24s), gender (55% of men compared with 38% of women), region (56% in London compared with 40% in East Midlands), socioeconomic group (61% of AB compared with 35% of DE), highest level of formal education (63% of post-graduates compared with 35% of those with GCSE/O-Level) and urbanity (52% of those in cities compared with 40% in smaller towns).

There are significant differences by vote intention, with those intending to vote Labour, Conservative or Liberal Democrat being much more likely to say the UK should aim to be a leader in R&D (57%, 51% and 50%, respectively) compared with those who intend to vote Reform or Green (42% and 40%, respectively) and than those who said they would not vote (27%).

Some of the strongest correlations are linked to both a sense of place and knowledge of R&D. Some 71% of those who think their local area is "thriving" said the UK should aim to be a leader in R&D, compared with 41% of those who think their area is doing badly. There is also a strong correlation with knowledge of R&D happening locally (73% of those who know a lot about R&D in their area compared with 40% who know nothing or hardly anything). A similar trend is evident for a feeling of connection to R&D (66% of those who feel connected said the UK should aim to be a leader compared with 35% who do not).

Figure 22: What is the public's view on the UK's place on the global R&D stage?



Source: Deltapoll and Icaro polling for CaSE • July 2025

Which one of the following best captures your view about how well the UK is currently performing against other major economies in Research & Development? / And what, in your view, should be our aspiration for Research & Development in the UK? n=8,000

R&D and place

The qualitative research mirrored the survey findings, with mixed views on the UK's current performance in R&D, including a general perception that the country excels in medical research but may be falling behind in computing and AI. There was a sense that the US and China are ahead of the UK, as well as potentially Japan and Germany.

However, there was near unanimous agreement that the UK should either aim to be a leader or – as a minimum – to keep pace with other countries. Motivations included a desire for more control, safety and security in an unstable world; economic competitiveness; a sentiment that the UK should be more ambitious; a desire to build upon or replicate the UK's history of innovation; and to have world leading academic institutions. Notably, for the latter, at this point Oxford and Cambridge were regarded as national assets rather than a source of regional resentment (as discussed in the Benefits of R&D chapter), and medical research was repeatedly noted as an area of UK excellence.

> "[My group] did think that it was vital for the country to remain ambitious and forward-looking and secure our place in the world, almost. We obviously want to keep place pace with global leaders and we obviously want to make sure that we don't scale back on R&D."
> **Female, 45-54, Taunton, AB, Indeemo**

> "I don't think the UK can be the leader in research and development because I don't think that we be able to catch up with some other countries. But I think we should aim to keep the pace of others with the leaders. The UK I would say is strong, very strong in terms of medical research. We've got Oxford and Cambridge and we've got free healthcare in the NHS, which is fabulous."
> **Female, 35-44, Middlesbrough, C1, Indeemo**

The focus groups also demonstrated that some cultural tropes dampen a belief the UK could be a leader. This included a view that the lack of a manufacturing base is detrimental to the R&D effort because the UK no longer "makes anything", as well as a related belief that the UK outsources too many jobs rather than focusing on creating jobs at home. One participant noted what they believe to be a lack of vision about what the UK is, or wants to be, good at in R&D.

> "The problem is, we don't… as a country, we don't make anything anymore. We don't produce anything."
> **Female, 45-54, Taunton, AB, Focus group**

Investing in R&D

Key takeaways

- Some 88% said it was at least somewhat important for the Government to invest money into R&D, and 71% think the Government should either increase or maintain levels of R&D investment.
- Time lags, risk and the trade-offs of investing in R&D are not an insurmountable barrier to public support, but they do concern around a quarter of the public.
- If there was extra money to invest in R&D, a majority (86%) said that new medicines and treatments should be a priority, followed by cleaner energy sources (72%).
- More than seven in ten (71%) agreed that the private sector has an important role to play in UK R&D, although focus groups demonstrated some concerns about the profit-driven motivations of business R&D.
- Half of people favoured an even mix of fundamental and applied research, after which there was a modest skew towards the latter.
- Levels of support for investment in R&D, along with attitudes to risk and time lags, and appetite for spending taxpayers' money on R&D are comparable with previous CaSE research.

Support for UK Government investment in R&D

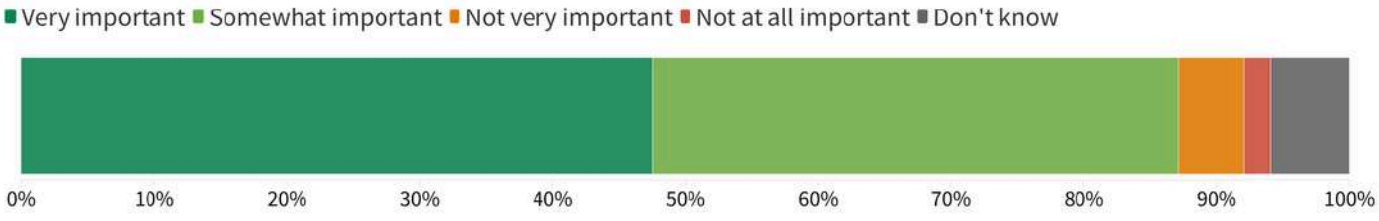
The principle of Government funding for R&D in the UK is well supported by the public. Almost nine in ten (88%) said it is 'very' or 'somewhat' important for the UK Government to invest money in R&D, including almost half (48%) who say it is 'very important' (Figure 23). This is a significant increase compared with CaSE's previous research (70% at least somewhat important, May 2022). By contrast, a minority (7%) said it is not important and a similar proportion (6%) said they don't know.

More than seven in ten (71%) think the UK Government should either increase the amount of money invested in R&D (38%) or maintain the current level (33%). A minority (7%) said the amount should be reduced, while around one in five (22%) said they don't know or it doesn't matter to them (Figure 24).

A majority of all sub-groups think that the Government should increase or maintain investment on into R&D, but there are significant differences by gender (78% of men compared with 65% of women); age (74% of 18-24s, 78% of 25-34s and 69% of those aged 65+); socioeconomic group (81% of ABs compared with 62% of DEs) and the level of formal education (82% of post-graduates compared with 64% of those with GCSE/O-Level). There is a small but statistically significant difference in terms of urbanity (75% of those living in cities compared with 68% of those living in rural areas).

There are significant differences by vote intention, with higher support for increasing or maintaining current R&D spend among those who intend to vote Labour (82%), Liberal Democrat (78%), Conservative (78%) and Green (78%). Support is lower – but still at two thirds – among those intending to vote Reform (67%) and lowest among those who say they would not vote (51%).

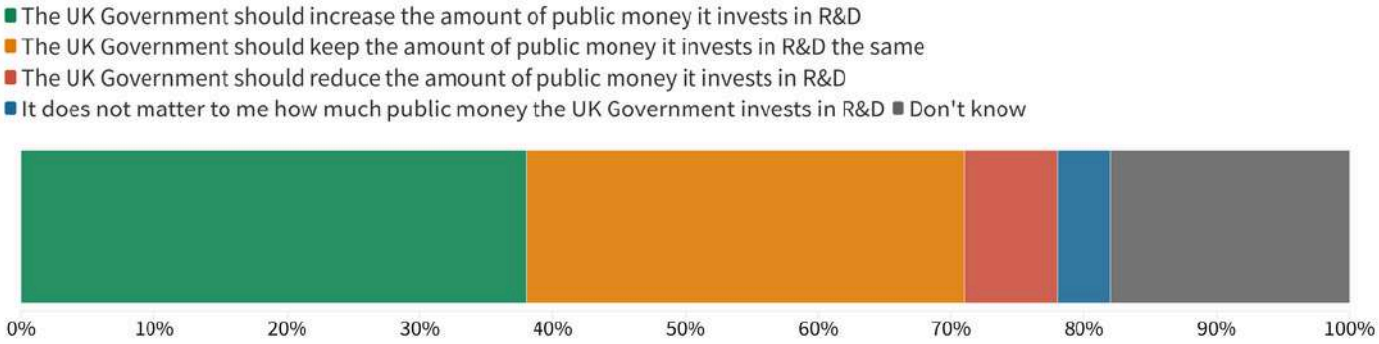
Figure 23: How important is Government investment in R&D to the public?



Source: Deltapoll and Icaro polling for CaSE • July 2025
How important, if at all, do you think it is for the UK Government to invest money in Research & Development? n=8,000

Investing in R&D

Figure 24: Do the public think the Government should increase, maintain or reduce investment in R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Do you think the UK Government should increase, reduce or keep at the same level the amount of public money it invests in Research & Development?
n=8,000

There are also very strong correlations according to sense of place and sentiment towards R&D. This includes:

- How well people think their area is doing (86% of those who said their local area is "thriving" would increase or maintain investment in R&D compared with 67% of those who said their area is doing badly)
- Knowledge of R&D happening locally (87% of those who said they knew a lot about R&D in their area compared with 66% who said they knew nothing or hardly anything
- A sense of connection to R&D (87% who feel connected compared with 62% who do not)
- Feeling that R&D is relevant to their life (84% who agreed compared with 59% who disagreed)
- Awareness of the term "R&D" (80% who have heard of it and know what it means compared with 61% who have not heard of before)
- Interest in science and technology (82% for each)

The proportion who said they think R&D funding should be reduced is small (7%) and shows relatively little variation by sub-group. This sentiment is higher among 18-34 men (11%), those who feel no connection to their area (11%), those who feel their area is being left behind (10%), those intending to vote Reform (10%) and socioeconomic group C2 (9%). However, it remains a minority position in each.

By contrast, the proportion who answered 'don't know' accounts for a larger share of the population overall, and displays significant sub-group differences. For example, there is a combined age-gender trend, with women aged 35-54 (25%) and 55+ (28%) more likely to say they don't know. This is compared with 11% of 35-54 men and 18% of men aged 55+. This is also true of socioeconomic group DE (25%), those whose highest education level is GCSE/O-Level (24%) or A-Level (22%), those not aware of R&D in their area (23%) and those who have not heard of the term "R&D" (26%). The two strongest correlations are with those who have not engaged with R&D in the past year (31% say they 'don't know) and those who say they would not vote in a general election (36%).

Attitudes to factors associated with investment in R&D

The survey identified support for several aspects of R&D investment that are often areas of concern for the sector. However, this finding must be tempered with a recognition that around a quarter of the UK public could hold views – depending on the framing – that might pose a risk to the sector's advocacy (Figure 25).

Taxpayers' money

At this point, the survey used a framing about using "taxpayers' money" for R&D, which has the potential to be more emotive than CaSE's other questions focussed on "investment". In this case, some 50% said that public funding for R&D is an acceptable use of taxpayers' money, while 28% said it was not. This aligns with CaSE polling from July 2022 and February 2023, where a slightly differently framed question found that 24% and 25% (respectively) agreed with the statement "R&D should not be funded by taxpayers".

Investing in R&D

When to invest in R&D

Some 57% said that investing in R&D now is a good way to grow the economy, while 24% said that we should only invest in R&D when the economy is doing better. This is broadly comparable with attitudes in previous CaSE research, but the question wording differed. In 2023, some 35% said that we should invest more in R&D now, whereas 46% said that we should invest more in R&D but only when the economy is in better shape.

Time lags in R&D

Some 59% said that funding for longer term R&D that delivers benefits in the future is very important, while 24% said that R&D should only be funded if it can deliver results right now.

Qualitative research also demonstrated that R&D can be seen as too slow but, somewhat paradoxically, can be accused of being too fast. Some participants feel that the length of the R&D journey is demotivating, especially in areas where the public want to see benefits more quickly.

Some of these opinions appear to be driven by the implementation of R&D's outcomes, rather than the R&D itself. Examples of 'too slow' included hydrogen boilers, which one participant said he had heard about for "years and years" without coming to fruition. By contrast, examples of 'too fast' included concerns about unintended side effects or risks associated with: medicines, such as the Covid vaccine and weight loss injections; new products such as vapes; and building materials, such as cavity wall and loft insulation and cladding on flats. Participants also mentioned poor performance of heat pumps.

> "I would like something to be developed over years and years and years before I actually decided that, you know, you're not going to grow an extra head or arm."
> **Female, 55-64, Belfast, C2, Focus group**

Risk in R&D

Some 54% said that failure is a fundamental part of R&D, and just 22% said that failure in R&D was unacceptable.

Qualitative research identified a different appreciation of risk or failure in R&D (as noted in the Benefits of R&D chapter), where the failure to properly implement R&D's outcomes can undermine the sense of benefits and promote a sense of financial waste.

This is subtly different to the concept of failure within the R&D process itself. Instead it focused on apparent failures in new products or major projects – often related to infrastructure – that the public associated with R&D. For example, participants cited experiences of heat pumps that had not worked well and poor-quality new build housing. HS2 was cited as a large-scale example of a perceived R&D failure, demonstrating how the public will not necessarily distinguish between the R&D elements of a project and delivery of the project itself.

> "There was a lot of R&D that went into HS2, billions. And it never went ahead. So that was a waste of taxpayer's money. A huge waste."
> **Female, 55-64, Belfast, C2, Focus group**

Figure 25: Public attitudes to different aspects of R&D investment

Source: Deltapoll and Icaro polling for CaSE • July 2025
From the following pairs of statements, pick the one that best describes your view. n=8,000

Investing in R&D

Even though these remain minority viewpoints, some sub-groups are more likely to adopt a 'negative' position to these questions. Taking the statement "R&D should not be funded by taxpayers' money", the groups most likely to align include 18-24s (34%); socioeconomic groups C2 (34%) and DE (31%); those whose highest educational level is GCSE/O Level (33%); those intending to vote Reform (37%); those who think the UK is a country in decline (33%); those who don't feel connected to their area (36%); those who think their area is doing badly or being left behind (34%); and those who disagree that "R&D is relevant to my life" (37%).

A very similar pattern across sub-groups is evident for the statement "We should only invest when the economy is doing better".

However, the sub-groups that align with the statements "Failure in R&D in unacceptable" and "R&D should only be funded if it can deliver results right now" are slightly different. While this again includes the same audiences noted above, it also includes those intending to vote Labour, those living in cities and those whose highest educational level is a post-graduate degree.

A consistent thread linking these sub-groups is the sense of decline and struggle noted in the Priorities and outlooks chapter. Rather than spurring a desire for more investment, these views seem to deter it. By contrast, groups with more optimistic outlooks favoured investment, exemplified by what we observed in the Belfast group where optimism fed desire for more investment as part of a virtuous cycle.

The focus groups closely mirrored these findings, with high in-principle support for more R&D investment, driven by narratives that include economic growth and opportunities for young people. There was also a sense that the world is constantly evolving and the UK needs to keep up with the pace of change or be ready for challenges such as cyber-attacks or political instability. A further key motivation is loss aversion, with participants keen to prevent the UK falling behind other major economies or missing out on opportunities for inward investment.

> "I do think it's [R&D] massively important. I think for quality of life now, future proofing our country and obviously for future generations."
> **Female, 45-54, Taunton, AB, Indeemo**

> "As a country, I strongly believe that we should be investing in R&D. I think if we just try to keep up with the pace, we run the risk of actually falling behind. And when I think of research and development, you know, it's deeper than just innovation. It's about shaping tomorrow. It's about empowering people, it's about powering the economy."
> **Female, 18-24, Nottingham, C1, Indeemo**

The discussions made clear that public investment in R&D is viewed very differently to private sector investment, which often suffered from being narrowly conceptualised as the development of technology products for profit (this is explored in more detail in the next section). There were higher levels of trust in Government-funded R&D, a belief that it would be more likely to focus on societal benefits, as well as the antecedents that could lead to a greater sense of ownership (i.e. "serve the public", "be for the benefit of us", "our money").

> "If it [more Government investment in R&D] is to serve the public? If it's eventually going to help the people at large in Britain, then I suppose, yes, it's a good use of public funding."
> **Female, 55-64, Cardiff, C2, Focus group**

In focus groups, the main concerns about Government-funded R&D related to waste and overspend, often driven by coverage of issues that are not directly connected with R&D (e.g. PPE after the Covid pandemic). There were also concerns about whether the current national finances would allow more spending on R&D, and a sense that more "spare money" was needed before R&D investment could be increased. This aligns with previous CaSE research, where increased R&D spending at times of financial crisis was a "luxury" that the country could not afford.

> "The fact is we've got no spare money. Ultimately, we really want to be doing more research and development, but until the economy grows it's hard to see where we'll find the money from. But again, it's kind of a vicious cycle, like there's no money, but then there's no economic growth, so there's even less money."
> **Female, 35-44, Cardiff, C1, Indeemo**

Investing in R&D

Areas for additional investment

The survey asked where people would prioritise additional R&D investment, from a predetermined list (Figure 26). There was strong support for extra investment in many areas, with all but five of the 15 options receiving support from more than half of respondents. There was a preference for investing into new medicines and treatments (86% selected this as a 'high priority' or 'priority'), followed by cleaner energy sources (72%), improving the delivery of public services (68%) and advances in defence and military technology (67%). Far fewer would prioritise advances in film and the performing arts (26%) or – perhaps reflecting the concerns noted elsewhere in this survey – in new consumer technology (48%) and improvements in AI (44%).

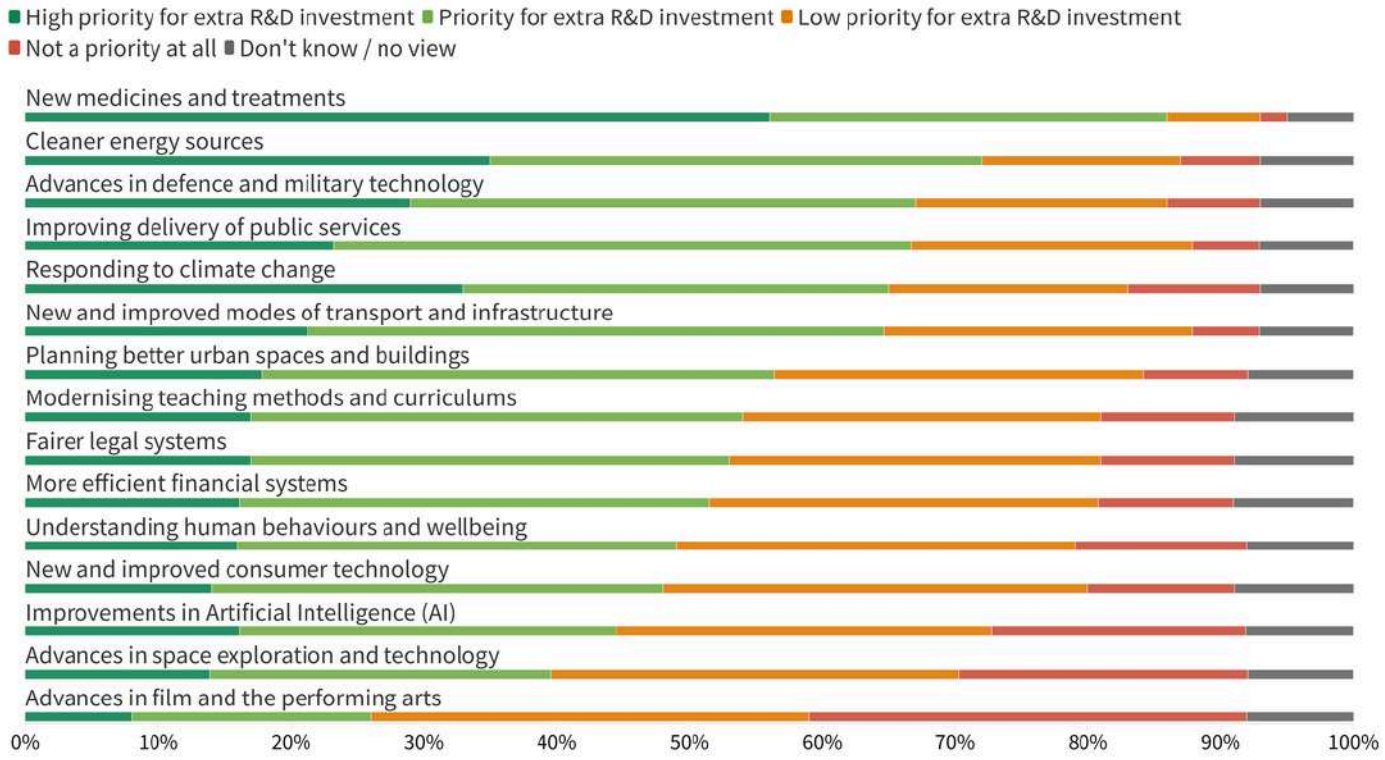
CaSE's previous research has used different approaches to explore how the public might prioritise R&D investment, so an exact comparison is not possible. However, we can see that healthcare and environment are consistently favoured, and there appears to be a slightly more receptivity to defence-related R&D since 2022, but further exploration is needed to understand any trend.

In focus groups, new medicines and cleaner energy were also identified as priority areas, alongside the potential for R&D to help improve the delivery of public services, which was a strong and recurring theme. Similar to the survey, consumer technology and AI were not identified as priorities for extra government investment, and participants continued to struggle to understand a clear R&D angle for advances in film and the performing arts.

> "I mean, the NHS is on its knees. They need money in all... many ways. But R&D would help, because if things could be streamlined or procedures could be made quicker or more accessible, then it benefits the whole population, and will help ease some of the pressure on the NHS."
> **Male, 25-43, Taunton, C2, Focus group**

> "I think the government should only be directly investing in in ideas and industries that are going to benefit everybody. So green issues comes to mind; you can't entirely leave that to the business sector because there are external factors. Maybe defence is another area where the government might decide it's such a high priority that we can't entirely leave this to business."
> **Male, Edinburgh, AB, Indeemo**

Figure 26: Where would the public prioritise extra R&D funding?



Source: Deltapoll and Icaro polling for CaSE • July 2025
If there was extra public money to invest in R&D, how much of a priority should each of the following be? n=8,000

Investing in R&D

The focus groups, where participants did not have a predetermined list, showed a tendency to gravitate towards personal priorities, including the economy, jobs, cost of living, crime and immigration. However, it was clear that participants found it difficult to separate out a general perceived need for investment in a priority area and a specific opportunity where greater R&D investment could help. They would prioritise crime, for example, while not having a clear sense of where R&D might be able to help. Some of these findings align with CaSE's previous research into the Government's missions, where more than a third (37%) said that it was unclear how R&D would help the Government achieve its missions.

However, spontaneous suggestions included tracking national ID cards; supporting first responders through better technology and communications systems; drones to support policing; and the analysis of crime 'hotspots'.

There were notable differences in priority issues according to political outlook. For example, those intending to vote Green wanted to see R&D used to improve the environment and address climate change, while those intending to vote Reform wanted to see immigration prioritised. Notably, some non-Reform voters also selected these issues – either in an attempt to nullify anti-immigration arguments or because they believe immigration delivers benefits and wanted research to deliver evidence to demonstrate this.

Centre left voters were instinctively more cautious about R&D investment in defence and the military, whereas right leaning groups were more positive. R&D investment in mental health and wellbeing was a recurring priority area across many of the groups and had bipartisan support.

> "One area I don't think should receive more R&D money is defence and military. I don't think further armament and development of new warfare is really what we need. I think it just creates a more hostile environment."
> **Female, 45-54, Sutton/Croydon, AB, Focus group**

The focus groups also explored views on the principles that should guide any additional R&D investment. There was broad agreement that R&D investment should fuel a virtuous circle of economic growth – by creating more jobs, greater efficiency and competitiveness, new products and businesses – and deliver personal growth. On the latter, participants talked about making life better today and for future generations, by being financially better off, having good physical and mental health and living in an area with good public services and infrastructure and low crime.

Those intending to vote for Reform were the outliers and tended to want a much stronger focus on improving things right now.

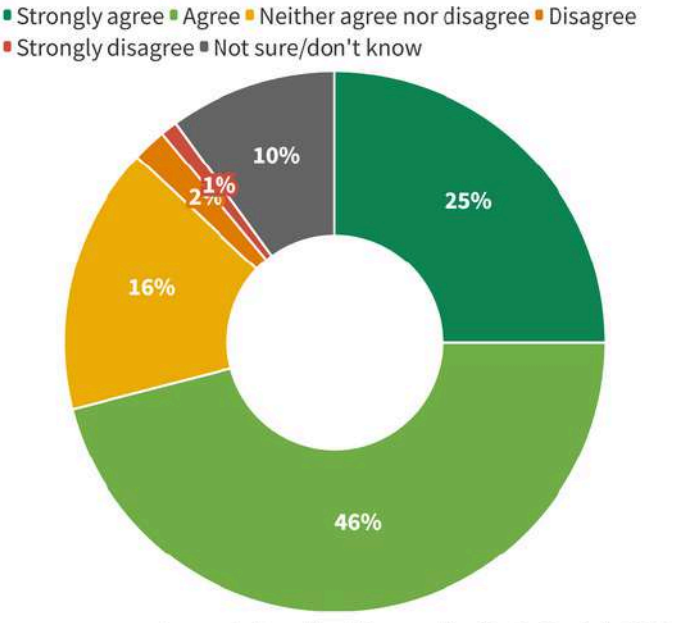
> "So, you've got like, making the economy stronger, creating jobs, increasing skills, providing opportunities, driving growth, and we feel like that also interlinks with making things better for future generations, solving tomorrow's problems."
> **Male, 24-34, Clacton, DE, Focus group**

> "We're in that much of a disarray at the minute in this country, I think we need to sort out the present – to look after the future."
> **Male, 45-54, Nottingham, C2, Focus group**

Role of private sector investment

While there were some concerns about private sector investment in R&D linked to both trust and assumptions that it is focused on consumer technology, support remains strong. Just over seven in ten (71%) agreed that private sector investment has an important role to play in R&D undertaken in the UK (Figure 27). Very few (3%) contest this position.

Figure 27: Do the public think private sector investment has an important role to play in UK R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Do you agree or disagree with the following statements. The Government should use R&D as a tool to solve society's problems.
n=8,000

Investing in R&D

Agreement is highest among men (78% compared with 66% of women), socio-economic group AB (85% compared with 58% of DE) and post-graduates (84% compared with 61% whose highest educational level is GCSE/O-Level).

There are clear differences by vote intention, with agreement highest among those intending to vote Labour (81%), Conservative (78%) and Liberal Democrat (75%), compared to those who would not vote (48%). Furthermore, some of the strongest correlations are with overall levels of engagement and knowledge of R&D. For example, agreement is highest among those who have heard of the term "R&D" (86%), agree they feel connected with R&D (88%) and are aware of R&D in their area (91%).

The focus groups aligned with this sentiment, with a broad acceptance of the importance of R&D funded by or undertaken by the private sector. Indeed, the public's default – and correct – assumption is that much of R&D is driven by the private sector.

However, as noted in earlier chapters, the focus groups have demonstrated some sentiments that are more challenging. This includes a default archetype that private sector R&D is limited to large multinational consumer goods or technology companies, or large multinational pharmaceutical companies.

Participants were routinely cautious about the potential for profit-led motivations to compromise the standard of privately funded R&D, which they felt was because there was a desired, or even predetermined, outcome. This created a degree of caution about R&D processes and the potential for bias in profit-making endeavours, although this was not to the extent that any participant questioned the value of private sector R&D. None of these concerns were raised in relation to R&D that is publicly funded, where the main concern was financial waste.

There were some hints from the discussions that more awareness of partnerships between universities and businesses may be useful in mitigating some of these concerns, as well as shifting the archetype that private sector R&D is solely related to big tech and big pharma. For example, among the handful of participants who mentioned such partnerships spontaneously in the discussions, attitudes towards private R&D investment were notably more positive and less subject to caveats.

> "I would say some research and development is predetermined. They want an answer. So, they look for the answer they get and they'll sell you the answer they've got, as opposed to doing proper research and development."
> **Male, 35-44, Cardiff, AB, Focus group**

> "If we didn't have the big companies coming over and investing and researching to do the development, then this country would lose out and so many massive projects and companies and you're talking millions if not billions of money lost from companies going to invest somewhere else."
> **Male, 25-34, Belfast, C1, Focus group**

The balance of fundamental and applied research

Survey respondents were shown a brief description of fundamental and applied research and asked what the balance of funding should be between these two elements. The description shown was as follows:

There are two main types of R&D:

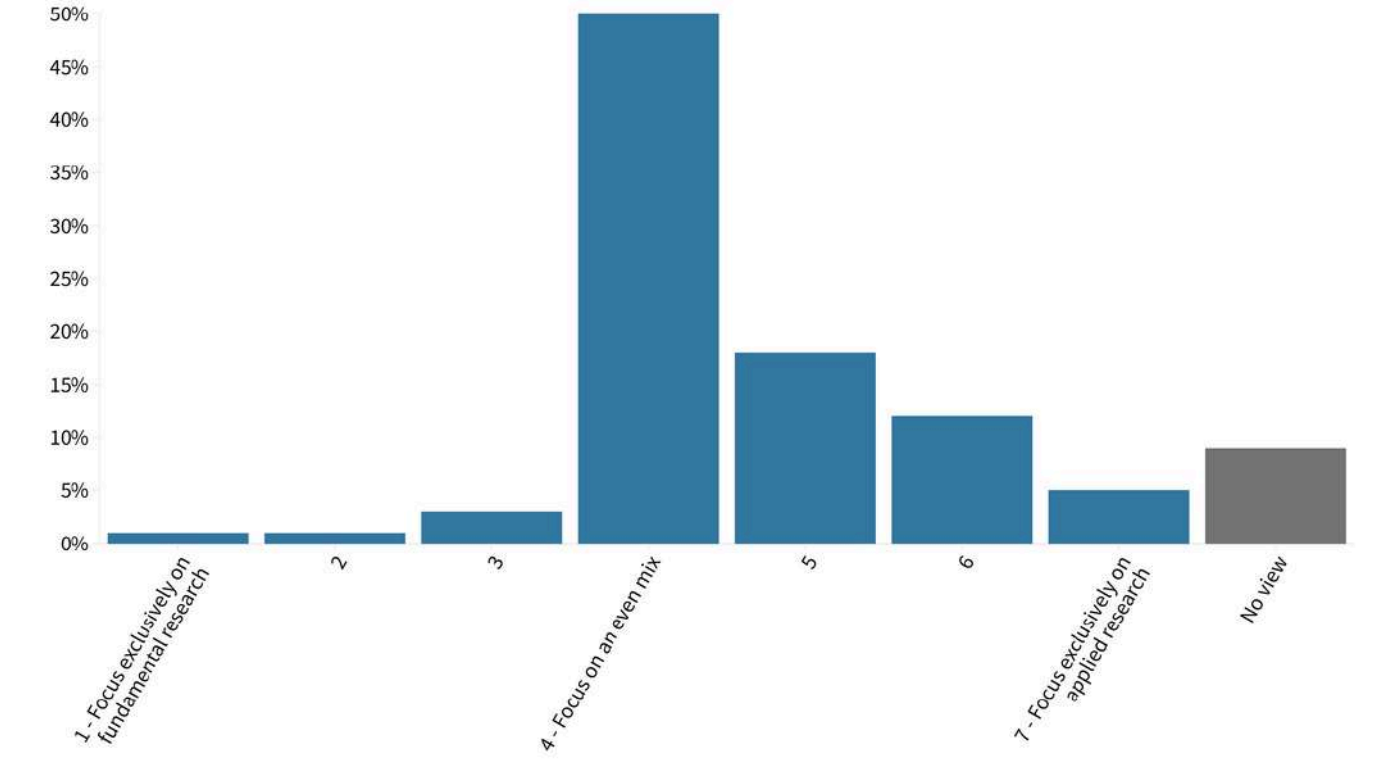
1) Fundamental research (sometimes called discovery research) seeks to increase knowledge and understanding of a subject, not to solve a specific problem. While it often leads to practical applications much further down the line, the purpose is to advance knowledge for its own sake.

2) Applied research aims to solve practical problems and develop solutions for specific challenges, typically on a shorter / faster timeline. It often builds upon the findings of fundamental research.

When responding to the question, half of people (50%) said there should be an even mix of both types of research, making this the dominant view. Beyond this, there was a modest skew towards applied research with around one in three (35%) preferring more focus on applied research, whereas one in twenty (5%) would prefer more focus on fundamental research (Figure 28). Close to one in ten (9%) stated no view.

Investing in R&D

Figure 28: What balance do the public want between fundamental and applied R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
What, in your view, should be the balance between fundamental and applied research in UK Research & Development. [Definition provided] n=8,000

Some groups are more likely to want a focus on applied research. This includes men (39%), those in London (41%), younger cohorts (48% of 18-24s, 38% of 25-34s and 40% of 35-44s), socioeconomic group AB (40%), post-graduates (43%), those intending to vote Labour (41%) or Conservative (39%), those who said they knew a lot about R&D in their area (51%), those who feel connected to R&D (49%) and those who think their area is "thriving" (45%).

Engagement and involvement in R&D

Key takeaways

- Just over half of the public (54%) have done at least one of a list of R&D activities in the past 12 months, but more than seven in ten (72%) would like to do at least one in the next 12 months, including 37% who would like to visit a science museum.
- There are high levels of support for greater transparency and public involvement in R&D. Some 80% agreed that the public needs to know more about how taxpayers' money is used for R&D, and 77% said that researchers should engage more with the public about the social and ethical implications of their research.
- Many stated a personal interest in participating in research studies (46%), using lived experiences and knowledge to help researchers identify research topics and design research studies (41%) and contributing to decisions about R&D funding or policies (26%).
- The qualitative research emphasised interest in R&D institutions engaging more with communities and schools, and making more use of traditional, local and social media.
- Many of the questions in this section were being asked for the first time, and so direct comparisons cannot be drawn.

Opportunities and appetite to engage with R&D

Just over half of UK adults (54%) have engaged with one of the R&D activities asked about in the survey in the past 12 months (Figure 29). This included engaging with something about science or R&D in either traditional media (24%) or social media (23%), visiting a science museum or discovery centre (23%) or sharing content or talking about science and R&D with friends and family (16%). By contrast, smaller proportions say they have taken part in a clinical trial (7%), taken part in a citizen science project (7%) or attended a public event about science or R&D (7%).

Overall, one in ten (10%) had done more than four types of engagement, close to one in four (24%) had done two or three, and a similar proportion had done one (20%). However, almost half (46%) had not done any.

Comparing the pattern of engagement in the past 12 months with desired engagement in the next 12 months, there is clear demand for increased opportunities.

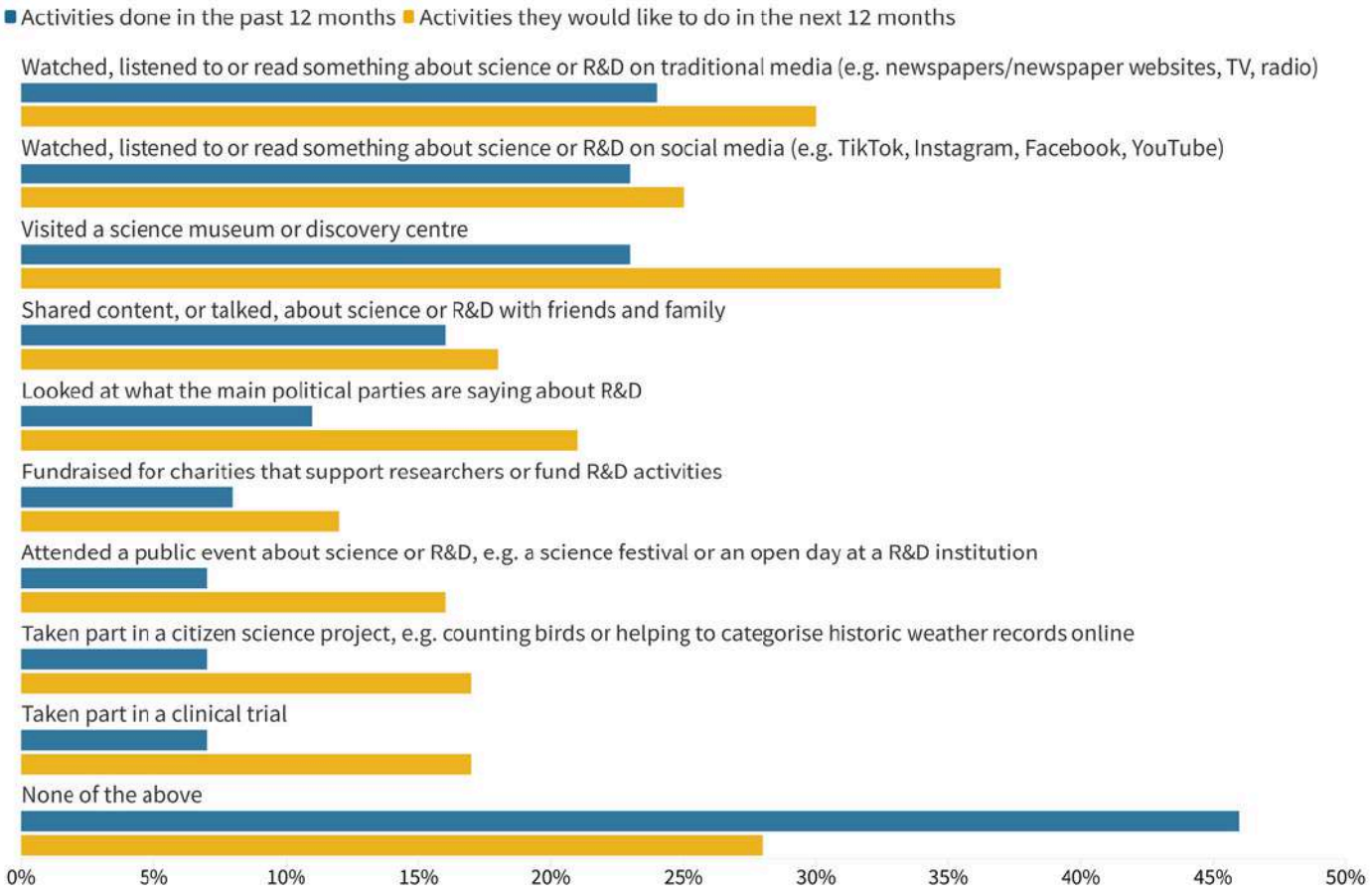
More than seven in ten (72%) said they would like to do at least one of these in the next 12 months, compared with the 54% who had done at least one in the past 12 months. This included visiting a science museum or discovery centre (37% would like to, compared with 23% who have), taking part in a citizen science project (17% compared with 7%), taking part in a clinical trial (17% compared with 7%) and attending a public event about science or R&D (16% compared with 7%).

Looking at activities done in the past 12 months, there are significant differences by:

- Gender (60% of men said they had done at least one compared with 49% of women)
- Age (70% of 18-24s and 77% of 25-34s compared with 43% of 55-64s and just 35% of those aged 65+)
- Geographical region (72% in London compared with 48% in Yorkshire & Humberside, 45% in Wales and 44% in Eastern region)
- Socioeconomic group (71% of ABs compared with 39% of DEs)
- Highest educational level (81% of post-graduates compared with 36% of those with GCSE/O Level)
- Urbanity (65% of those in cities compared with 43% in rural areas)
- Vote intention (those who intend to vote Labour (71%) and Green (63%), compared with those who intend to vote Reform (45%))

Engagement and involvement in R&D

Figure 29: What R&D related activities have the public done and want to do?



Source: Deltapoll and Icaro polling for CaSE • July 2025
Which of the following, if any, have you done in the past 12 months? Select all that apply. / Which of the following, if any, would you like to do in the next 12 months? Select all that apply. n=8,000

There are powerful correlations with the public's sense of place, including how connected they feel to their area (68% who had done at least one activity among those who feel very connected, compared with 35% who feel no connection). Additional correlations are how well they feel their area is doing (82% of those who think it is 'thriving' compared with 48% who feel it is doing badly) and knowledge of R&D locally (81% among those who said they knew a lot about R&D in their area compared with 44% who said they knew nothing or hardly anything).

Topics of interest, unsurprisingly, correlate with levels of R&D engagement. Some 74% who said they were interested in science had done at least one activity in the past year, as had 71% who said they were interested in technology. The same is true of how connected they feel to R&D (86% of those who said they feel connected to R&D compared with 36% among those who disagree). The same trends are all evident in people's appetite to engage with R&D in some form in the next 12 months.

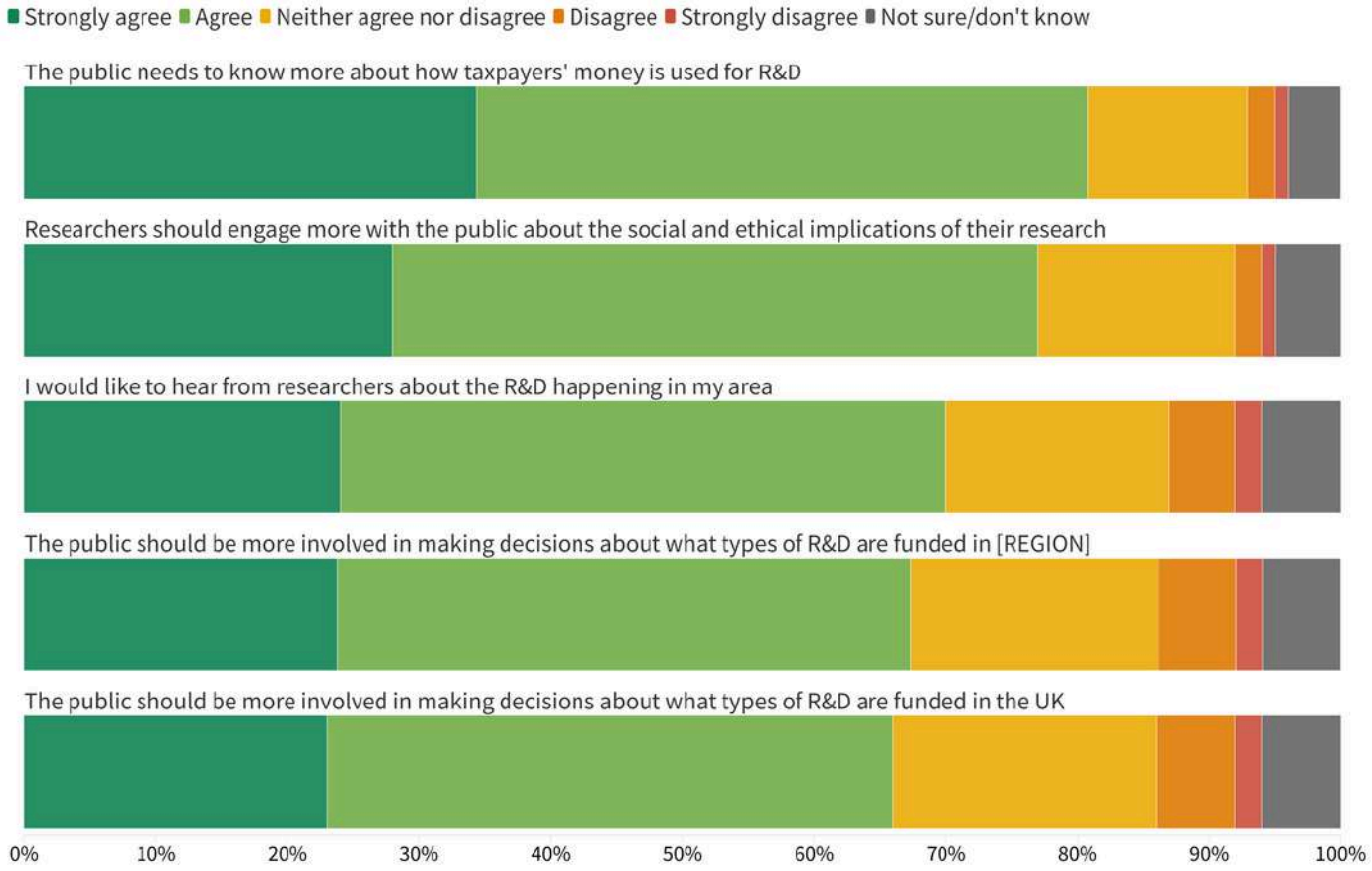
Desire for public engagement and involvement in R&D

There are high levels of support for more public engagement and involvement in R&D; attitudes that can be seen reflected in the commentary throughout the report. Four in five (80%) agreed that "The public needs to know more about how taxpayers' money is used for R&D", which reflects the sense of ownership of publicly funded research endeavours and sensitivity towards the use of taxpayers' money (Figure 30).

A similar proportion (77%) agreed that "Researchers should engage more with the public about the social and ethical implications of their research", which is likely influenced by the desire to ensure R&D brings societal benefits. It also speaks to the appetite for greater transparency around the processes and people associated with R&D that CaSE has consistently found among the public.

Engagement and involvement in R&D

Figure 30: Public appetite for more engagement and involvement in research



Source: Deltapoll and Icaro polling for CaSE • July 2025
Do you agree or disagree with the following statements? n=8,000

There was also strong agreement (70%) with the statement "I would like to hear from researchers about the R&D happening in my area", reflecting high levels of interest in what is happening in their area and taking advantage of the local sense of place.

Finally, we see strong support for the public being more involved in the decisions about what type of R&D is funded at both a UK level (66%) and regional level (68%). Again, this is likely driven by a desire to understand and influence where public money is spent, along with strong appetite for more transparency about R&D.

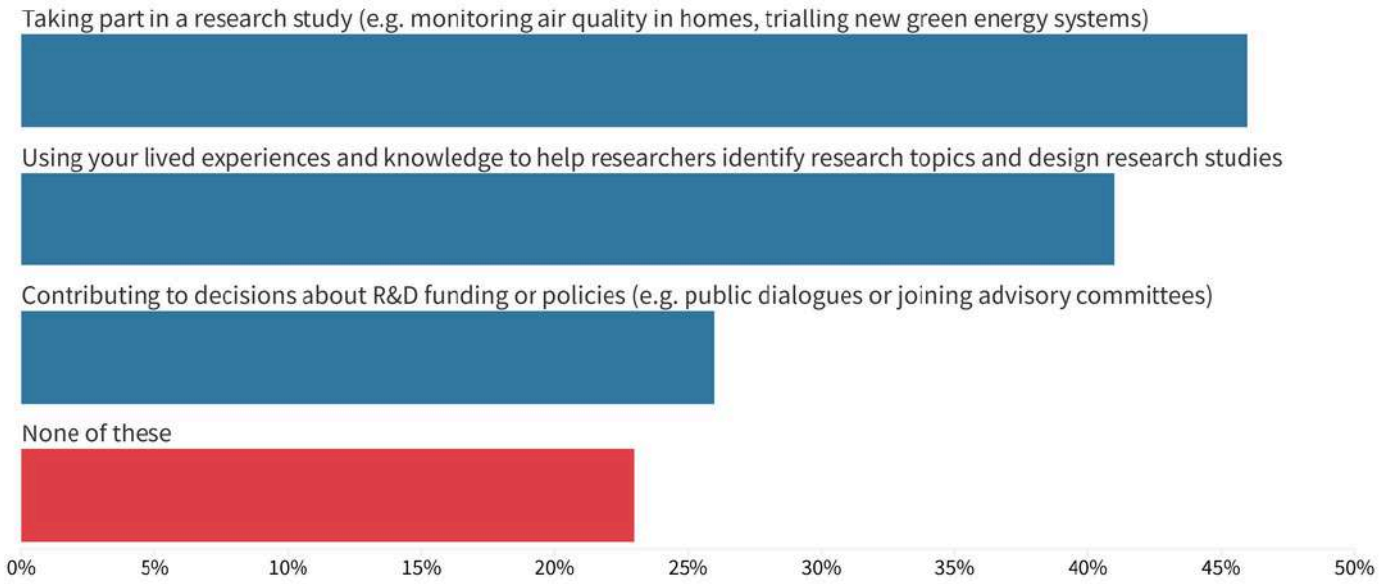
There are no observable trends by the demographic sub-groups that have been consistently highlighted throughout this report, including socioeconomic group, highest educational level, geographic region and urbanity. The same is true for vote intention and respondents' attitudes to their area. Instead, there is a very high level of consistency in these findings across all sub-groups.

The survey then explored whether the public would be personally interested in being involved in R&D itself. It focused on three broad aspects of public involvement: participation in research studies (using examples that did not relate to clinical trials); participatory research through co-creation or co-design; and involvement in decision-making (using examples of public dialogues or advisory committees) (Figure 31).

The most frequently selected option – by almost half (46%) – was "Taking part in a research study, e.g. monitoring air quality in homes, trialling new green energy systems)". This was closely followed by "Using your lived experiences and knowledge to help researchers identify research topics and design research studies" (41%). A smaller group of around one in four (26%) said they would be interested in "Contributing to decisions about R&D funding or policies, e.g. public dialogues or joining advisory committees". A sizeable minority of around one in five (22%) said they would not be interested in any of them.

Engagement and involvement in R&D

Figure 31: Are the public personally interested in involvement in R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
If you were offered the chance, which of the following would you personally be interested in? n=8,000

Public engagement and involvement were not directly explored in the qualitative research. CaSE carried out a detailed examination of attitudes to involvement in 2024 through out a public dialogue, People's Vision for R&D, where participants developed a set of People's Principles for Public Involvement in R&D.

However, these group discussions did offer insights into participants' attitudes to engagement. Some suggested public lectures and events, while others proposed engagement through science museums and discovery centres. Emphasising the need for the R&D sector to make an active effort to engage broadly, participants expressed more interest in universities doing outreach activities and going into the community than in the public visiting the university or, for example, spending a day with a researcher.

Several suggested working with local schools, including one participant in Nottingham (with young children) who wanted to see more of a joined up local offer, from primary schools all the way through to university.

> "I feel like that [outreach visits from the university to local schools] would be really good because I don't think we've ever had a visit from anyone from Teesside University bringing any knowledge of their, you know, day-to-day comings and goings. And again, it will gain knowledge for a lot of children."
> **Female, 35-44, Middlesbrough, C1, Depth interview**

Beyond deeper forms of engagement, there were also suggestions in the groups for more traditional forms of communication and dissemination through mainstream national and local media, and social media.

Throughout the groups, there was a strong sense that to build a stronger connection with the public, the R&D community should tell tangible and relatable stories that connect on a more human and more local level.

> "I think case studies and personalising it helps, you know, if you can actually talk about the problem that you're trying to solve and the solution. Quite a lot with, you know, it starts with a person who's got dementia, a person who's had cancer, a person who's lost a family member. You can tell that story from beginning to end. You can talk about the problem and the sadness and the solution and personalize it and ground it in a real story."
> **Male, 45-54, Sutton/Croydon, AB, Depth interview**

> "Not a Love Island for R&D but maybe having to think out of the box to get people talking. I mean, you know, people doing TikTok dances to get popular. It's instilling an idea or something in someone."
> **Female, 35-44, Edinburgh, C2, Depth interview**

Trust

Key takeaways

- A large majority said that they would trust information about R&D from research charities (84%), researchers (81%) and universities (77%).
- There are high levels of trust in R&D voices to talk about how much money the Government should invest in R&D, at 80% for research charities, 74% for researchers and 72% for universities.
- Across both trust questions, the least trusted groups were politicians, commentators on social media and journalists.
- The qualitative research emphasised the importance of the public hearing from experts and people who reflected them or their communities.
- Compared with previous CaSE research, this study suggests higher levels of trust in R&D sector voices, but the overall ranking of messengers is comparable to previous studies.

Trust in groups who might talk about R&D in the UK

The survey found that a range of groups are widely trusted to talk about R&D in the UK, although a small minority are distrustful of most groups (Figure 32).

When asked how much they would trust information about R&D from a range of organisations or groups of individuals, the most trusted were research charities. Some 84% said they were either very or somewhat trustworthy, with just 10% saying they were not very or not at all trustworthy.

This was followed by researchers (81%; 11%), universities (77%; 15%) and patients or patient groups (73%; 15%). Friends and family feature prominently (73%; 16%), slightly more so than UK Research and Innovation, which was described in the question as the Government agency that funds research (70%; 20%).

In contrast, three groups are widely distrusted: journalists (38% trustworthy compared with 54% not trustworthy), commentators on social media (29%; 62%) and politicians (25%; 68%).

Analyses by sub-group add to this picture. Some groups are less distrustful of a range of messengers, most notably socioeconomic groups C2s and DEs, those who highest educational level is GCSE/O-Level, those intending to vote Reform and those who don't feel connected to their area or feel their area is doing badly.

Turning to specific messengers, some sub-groups are more likely to say they would not trust information about R&D from researchers, although this is always a relatively small minority across all groups. This includes some age cohorts (15% of 18-24s and 13% of 35-44s, compared with 11% who selected not trustworthy overall) and socioeconomic groups C2 (15%) and DE (14%).

Levels of distrust in researchers were higher among those who intend to vote for Reform (16%) and those would not vote (15%), and among those who said they feel no connection to their area (23%).

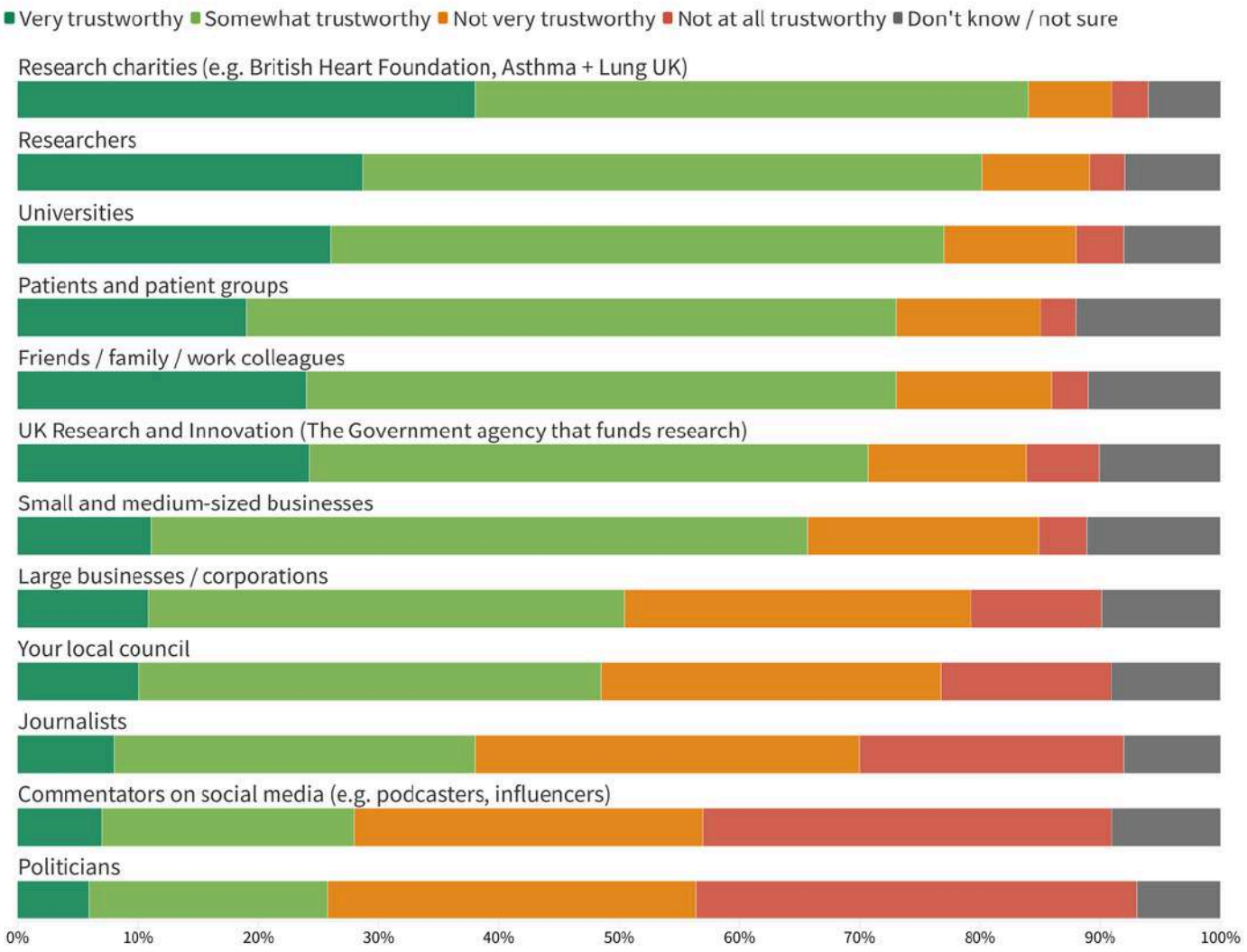
A similar pattern is evident for universities as messengers of information about R&D, but some of the sub-groups who are distrustful increase in size. For example, compared with 15% who selected not trustworthy overall, the levels of distrust are notably higher among socioeconomic group C2 (21%), those whose highest level of formal education is GCSE/O-Level (19%), those who intend to vote Reform (24%) and those would not vote (20%).

While commentators on social media are widely distrusted across UK adults (29% trustworthy; 62% not trustworthy, giving a net trust score of minus 35), this flips to a net positive score among several cohorts.

This is notable for 18-34 men (53% trustworthy; 43% not trustworthy), those with children aged 0-10 (53%; 43%), post-graduates (49%; 47%), those who think their area is "thriving" (63%; 35%) and those who feel connected to R&D (54%; 43%).

Trust

Figure 32: How trusted are different groups to talk about R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025

Here are some people or groups who might talk about Research & Development in the UK. To what extent would you trust information about R&D from each of them? n=8,000

Comparison with previous CaSE research suggests higher levels of trust in R&D sector voices, as various results across 2022-24 show around seven in ten trust scientists, and trust them to be honest about how helpful R&D is and to honestly explain its results. Again, previous research consistently found lower levels of trust in politicians and journalists.

Trust in groups to be honest about R&D funding and investment

The survey used a second framing to explore who is trusted to be honest about how much money the UK Government should invest in R&D. This produces a very similar result (Figure 33).

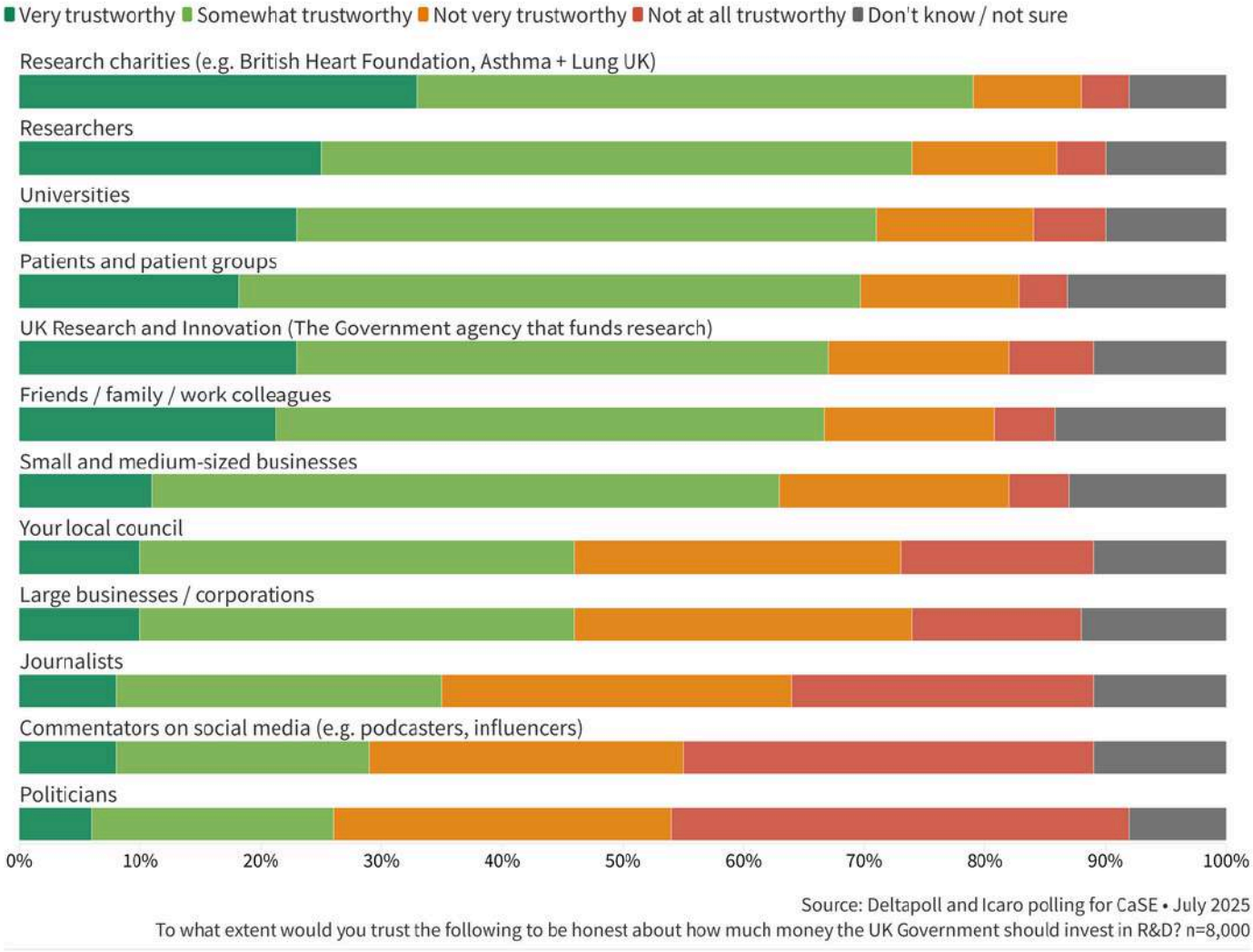
This shows the same ranking from most to least trusted, and similar trends across sub-groups, with the main difference being a slight fall in levels of trust across all groups once the issue of funding is introduced. The only exception is politicians, who in fact see a minor increase (although they remain the least trusted messenger overall).

Some 80% said research charities would be very or somewhat trustworthy when talking about how much money the Government should invest in R&D, with just 12% saying they were not very or not at all trustworthy.

This was followed by researchers (74%; 16%), universities (72%; 19%) and patients or patient groups (69%; 18%). After this came UK Research and Innovation (67%; 22%) and friends and family (66%; 19%).

Trust

Figure 33: How trusted are different groups to talk about how much the Government should invest in R&D?



Source: Deltapoll and Icaro polling for CaSE • July 2025
To what extent would you trust the following to be honest about how much money the UK Government should invest in R&D? n=8,000

The same three groups were broadly distrusted: journalists (35% trustworthy compared with 55% not trustworthy), commentators on social media (28%; 61%) and politicians (26%; 66%).

Some groups are less distrustful of a range of messengers on investment, most notably socioeconomic groups C2 and DE, those whose highest educational level is GCSE/O-Level, those intending to vote Reform and those who don't feel connected to their area or feel their area is doing badly.

Turning to specific messengers, some sub-groups are more likely to say that they would not trust researchers to talk about how much money the Government should invest in R&D, albeit again a relatively small minority across all groups. This includes some age cohorts (19% of 18-24s and 19% of men aged 55+, compared with 16% who selected not trustworthy overall), socioeconomic groups C2 (20%) and DE (18%) and differences by geographic region (21% in the Midlands).

Levels of distrust in researchers are higher among those who intend to vote for Reform (22%) and those would not vote (21%). It is also notably higher among those who said they feel no connection to their area (26%).

A very similar pattern is evident for universities, but again some of the sub-groups who are distrustful increase in size. For example, compared with 19% who selected not trustworthy overall, the levels of distrust are notably highest among socioeconomic groups C2 (23%) and DE (21%), those whose highest educational level is GCSE/O-Level (23%), those who intend to vote Reform (29%) and those would not vote (24%). In addition, it is higher still among those who feel no connection to their area (32%).

Trust

While commentators on social media are widely distrusted across the population (28% trustworthy; 61% not trustworthy, giving a net trust score of minus 35), this again flips to a net positive score among several cohorts. This is notable for 18-34 men (52% trustworthy; 43% not trustworthy), those with young children aged 0-10 (53%; 41%), postgraduates (48%; 47%), those who think their area is "thriving" (64%; 33%) and those who feel connected to R&D (54%; 43%).

Comparisons with CaSE's previous research suggests higher levels of trust in R&D voices to be honest talking about how much money the Government should invest in R&D than previous years, although the question was framed slightly differently as an agree/disagree scale. In July 2022, some 54% agreed that they would trust research charities to be honest about how much money the Government should invest in R&D. This figure was 54% for researchers, 51% for universities 29% for businesses, and 19% for politicians.

Although trust was not a core focus for the qualitative research, the issue was invariably raised (and has already been noted earlier in the Benefits of R&D chapter). The qualitative research mirrors the survey findings, identifying a high level of trust in researchers and scientists. They are often the group that participants said they wanted to hear most from about R&D as "experts" in their field.

> "I mean, nothing's irrefutable these days, I suppose, but you've actually got it in black and white and figures that people can see and understand from an expert. If there was a figurehead that people knew that was trusted, that would be great."
> **Male, 45-54, Edinburgh, C1, Depth interview**

Attitudes to the Government as a messenger were mixed – some were comfortable with the Government talking about R&D, and expected them to do so. However, others felt that experts and individuals or groups from within the community, who were 'more like them', would be better placed to get the message across.

> "I think it's really important to be open and honest. I think that comes from our leadership downwards. I think we need to get to a place now where our leaders are much more accountable and they are open and honest."
> **Female, 45-54, Taunton, AB, Indeemo**

There were also multiple references to groups or individuals that were distrusted. Notably, this research took place around the time of US President Donald Trump's comments linking Tylenol (paracetamol) and autism (of which there is no evidence).

> "I think you want to hear from the experts, from the people that know. I mean, a perfect example a couple of days ago was in America where Trump just spoke and all this stuff about Tylenol. You don't want to hear from someone like him that you don't trust."
> **Male, 45-54, Edinburgh, C1, Depth interview**

Methods

The research adopted a mixed methods approach, involving a large scale survey of 8,000 UK adults alongside eight focus groups with 64 participants, followed by supplementary qualitative strands in the form of depth interviews (with ten of the focus group participants) and video interviews (with 12 of the focus group participants).

1. Quantitative research

Sample

8,000 interviews were conducted online with adults aged 18+ using proprietary online panels. These panellists are recruited and agree to receive surveys periodically. Invitations for individual surveys are sent out according to the quota targets to control the sample profile, and respondents receive a small financial incentive (e.g. £0.50-£1.00 per five minutes of survey time). Fieldwork took place across 11-21 July 2025.

Quotas targets were set on region, age and gender (interlocked within region) and ethnicity to ensure that the sample reflects the known profile of the UK population on these demographic criteria. Minor shortfalls in achieving quota targets were addressed using RIM weighting post hoc, including additional weighting applied to socioeconomic group to ensure the correct profile according to the UK population.

Providers

The research was led by Icaro, a Market Research Society (MRS) Company Partner. Survey fieldwork was executed by Deltapoll, who are a member of the British Polling Council and abide by its rules.

Survey design

Survey questionnaires went through several rounds of iteration between Icaro and the CaSE team. Quantitative opinion data is always subject to a number of possible biases, most importantly a tendency for participants to agree with statements or "satisfice". To counteract this, the survey was designed to vary the types of questions shown, and incorporate binary choice scales and multi-select questions as well as agree-disagree Likert-style questions. Attention was also given to the potential for sequencing bias and priming, with questions about awareness of the term R&D, for example, appearing early in the questionnaire.

Reaching the sample

Participants were recruited through online proprietary panel providers, where individuals register their interest in taking part in online research in return for incentives. By their nature, online samples exclude those with low levels of digital access, however they enable strong control over the demographic make-up of the final sample. The sample is targeted to be representative of the UK public according to the chosen quotas. All surveys are subject to some level of recruitment bias, where those who are interested in taking part may represent a more "engaged" group of people than if the selection was truly random. By reaching the sample through online panels, incentives can be tailored to meet specific groups to encourage the participation of those who are less likely to volunteer.

The survey also features attentional checks for inattentive responding, both in the form of trap questions where participants are instructed to select a specific answer option in order to proceed, and open-response questions which are retrospectively assessed for "nonsense" responding. All surveys also feature "reCAPTCHA" checks for bots, to prevent surveys being flooded by scripted responses, with a second check for such problems during analysis of any open responses.

Analysis

Full access to the data tables is provided from CaSE's website (see Download the Data), broken down by demographic groups. We have adopted a convention that sample sizes of less than 300 are too small for meaningful analysis or to adequately represent the sub-group, and so they are avoided throughout our analysis.

All survey results are subject to margins of error (because a sample has been surveyed, unlike in a Census where everyone answers). Statistical tests have been undertaken to the 99% confidence level (i.e. 99 times out of 100 the observed difference will be real vs. 1 time out of 100 it will have happened by chance).

For this survey with a sample of 8,000, the maximum margin of error in the results is ±1.4% (i.e. if the survey result is 50% then the real result if everyone in the UK was interviewed would be in the range 48.6% - 51.4%). When comparing the results from this survey with previous surveys undertaken by CaSE of an equivalent sample size, the maximum margin of error between waves is ±2.0% (i.e. an increase from 50% to 53% would be statistically significant, but an increase from 50% to 52% would not).

Methods

NB. Statistical tests are only valid when the survey method has used random probability sampling. While the market research industry routinely applies the same logic to non-probability samples, like this survey, this must be done with appropriate caveats - including an acknowledgement that confidence limits are, technically speaking, not possible to calculate. Any reference in this report to statistically significant differences should be used to accurately guide the interpretation of trends and differences in the data, rather than be taken to be objective statistical fact.

2. Qualitative research

The qualitative research involved three elements of work

- Eight focus groups involving 64 participants
- Follow up in depth interviews with 10 of the focus group participants (undertaken online)
- Follow up video interviews with 12 of the focus group participants, using a smartphone app called Indeemo (which is similar to Instagram)

a) Focus groups

The focus groups involved UK adults, selected to meet certain demographic or attitudinal criteria, participating in a facilitated discussion led by a moderator.

These groups were held face to face in eight different locations across the UK: Belfast, Cardiff, Clacton, Edinburgh, London (Sutton/Croydon), Middlesbrough, Nottingham and Taunton. These locations were selected by Icaro and CaSE to reflect: (a) representation of the four UK nations and English region; (b) political representation in terms of how the areas voted in the 2024 UK General Election, (c) a mix of cities and towns (including coastal towns), and (d) a mix of levels of R&D activity happening in each locality. One group was conducted in each location.

Focus groups are useful for understanding – in people's own words – why they hold the views they do. They are particularly useful in unpicking views and providing granularity about the 'how' and 'why' that sits behind headline survey findings. However, the resulting data necessarily comes from a small sample size, so it is conveyed in terms of key discussion themes (and supporting quotes) and never in the form of statistics. We avoid drawing conclusions about the "proportion" who hold views and instead focus on exploring broad themes. Words such as 'most' or 'only some' are sometimes used to distinguish overtly majority or minority positions, but it was not the intention of the groups to establish consensus, nor dismiss positions held by only some in the group (since they may reflect a wider audience outside of the confines of a group of eight individuals).

Recruitment

Once the locations for the groups were determined, recruitment of participants from that locality was undertaken according to a recruitment questionnaire. This performs two roles: the first to screen out participants who work in certain industries (e.g. market research) or have undertaken more than a certain number of focus groups in the past six months; the second to set quotas to guide the composition of the sample. The following quota variables were used:

- Gender (50:50 split)
- Age (a mix of ages from 21-70)
- Socioeconomic grade (a mix across AB, C1, C2, DE)
- Ethnicity (representation of White and BAME groups, flexed to locality)
- Vote intention at the next UK General Election (minimum 2 Centre Left; 2 Conservative; 2 Reform)
- Pre-existing interest in science (from a long list of subjects of interest): minimum two; maximum four

Discussion guides and moderating groups

Moderators who facilitate the focus groups follow a discussion guide, which establishes the key questions to be answered throughout the group, with ample space for discussion to deviate if new topics or discussion points arise. For copies of the discussion guide used in our groups, please contact Rebecca Hill. The role of the moderator is to ensure:

- Everyone in the group is given opportunity to express their views.
- The conversation is not derailed by arguments between participants, or by individual participants dominating the conversation.
- The conversation remains on topic. This is particularly important when the discussion covers broad or abstract areas like R&D.
- That, where possible, relevant points made by participants are explored in more detail by prompting with follow-up questions.

Methods

Analysis

Analysis of qualitative data is normally carried out through detailed readings of the transcripts, identifying broad themes and language used by the participants, and looking for patterns in how participants respond to the specific questions. In our analysis we have aimed to demonstrate both where the broad findings of the quantitative research have been supported by qualitative data and where it has been challenged. We have aimed to present any quotations from the qualitative work with as much context as possible, to ensure these can be reliably interpreted.

b) In depth interviews

Following on from the focus groups, a smaller number of participants from the original groups (10) were recontacted to take part in an interview. Interviews were 30 minutes in length and conducted online, in the form of a semi-structured discussion with one of the focus group moderators. They took place from 25 – 29 September 2025.

The purpose of the interviews was to three-fold: a) to follow up in more detail some of the themes covered in the groups (e.g. benefits of R&D); (b) to capture views towards some themes that were not possible to cover adequately in the groups (e.g. views on what a researcher is like / who they are); and (c) to capture any further reflections they'd had since the groups (e.g. had they given RD& any more thought, or discussed it with friends/family).

c) Video interviews (via Indeemo)

In parallel to the depth interviews, 12 participants from the focus groups were recontacted and invited to take part in a follow on phase that involved answering questions through selfie videos, using a dedicated 'in the moment' research app called Indeemo.

Six questions were pre-determined and – like the depth interviews – they covered a mix of territory from the focus groups as well as new topics (e.g. how can the R&D sector ensure it connects more with the public?). The main difference to the depth interviews (other than some differences in thematic coverage) is that there is no moderator present and the process is self-guided. The outputs are also different and primarily take the form of video clips or video reels to convey what respondents think in their own words (in a highly engaging and visual way). They took place from 27 – 30 September 2025.

Quotes in the report

Quotes are used throughout the report to illustrate the points being discussed and help 'bring the findings to life'. Each quote is tagged with some basic information about the participant (i.e. gender, age band, location, socioeconomic group). In addition, the last element of the tag indicates where the quote originated from (either 'focus groups', 'depth interview' or 'Indeemo').

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