

# Research Report

## Survey of Public Opinions of Non-Degree Qualifications in Wales 2021



Prepared for:  
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## Executive summary

### Introduction

Qualifications Wales has commissioned Beaufort Research to conduct an annual survey of the Welsh general public to measure public confidence in non-degree qualifications in Wales and in the qualification system. This report provides results for the 2021 survey, following earlier surveys undertaken in 2017 to 2020<sup>1</sup>. As in previous years, the research was conducted on the September Beaufort Wales Omnibus survey which interviews a representative sample of 1,000 Welsh adults. Up to early 2020 interviewing on the Wales Omnibus was conducted face-to-face via CAPI (Computer Aided Personal Interviewing). As a result of the COVID-19 public health crisis interviewing switched to an online approach, using the Cint™ online panel exchange platform. Interviews for the 2020 and 2021 public confidence surveys were therefore conducted online.

Fieldwork was carried out between 13 September and 3 October 2021. The questionnaire for the Qualifications Wales survey comprised a series of questions about qualifications, mostly using a 5-point Likert Scale with an additional 'don't know' response option. The questionnaire was consistent with earlier surveys to track changes over time but the change in data gathering approach from 2020 may have resulted in some differences in findings.

### Summary and conclusions

Public confidence in AS/A levels was generally high, as in previous years, with a composite AS/A level confidence score of 3.70 out of 5. This was slightly higher than the 2020 score (3.66) but the year-on-year difference is not statistically significant. AS/A levels were felt by the public to be trusted qualifications and good preparation for further study. As in previous years, there was some disagreement about whether AS/A levels were good preparation for work and how well the qualifications were understood by people (with about one in five disagreeing with the first and one in six disagreeing with the second statement). Almost four in ten of the public were not able to comment on whether the marking of AS/A levels was accurate, and almost three in ten could not give a view on whether standards were maintained year on year.

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<sup>1</sup> These reports can be found on QW's publications [webpage](#)

The public confidence composite score for GCSEs in 2021 (3.83) was significantly higher than the composite score for AS/A levels (at 3.70) and represents a significant increase from its 2020 level of 3.74. Public perceptions of GCSE qualifications were similar on the whole to those of AS/A levels, with the strongest endorsement of GCSEs for being 'a trusted qualification', 'well understood by people' and 'good preparation for further study'. However, GCSEs were perceived to be better understood qualifications than AS/A levels (only 5% disagreed in 2021 that they are well understood, compared with 16% in the case of AS/A levels). As was the case with AS/A levels, a sizeable proportion of the public (24%) disagreed that GCSEs are good preparation for work and a similarly high proportion of the public was unable to comment on whether GCSE marking is accurate (31%).

Levels of agreement with most confidence statements for both AS/A levels and GCSEs rose in 2021, after falling back in 2020. In 2020 the proportion of survey respondents answering 'neither agree nor disagree' increased, probably because of the change in method to a self-completion online survey. Results for most confidence dimensions are therefore now at a similar level to those seen in 2019. The largest year-on-year increase in 2021 for both AS/A levels and GCSEs was evident for being 'trusted qualifications'.

Awareness of the Welsh Baccalaureate qualification has continued to rise among the public, with almost eight in ten adults in Wales saying they had heard of it in 2021 (increasing from around seven in ten in 2020 and six in ten in 2019). Familiarity with the qualification remains low outside the youngest age group, however – most of those who had heard of it either knew nothing or very little about it. Perceptions of the value of the Skills Challenge Certificate component of the Welsh Baccalaureate were positive, as in earlier tracking surveys, and agreement that 'It is valuable for young people's futures to be able to take a Skills Challenge Certificate' rose slightly year on year to 68%, but the increase is not statistically significant.

Perceptions of vocational qualifications in Wales in 2021 were positive, with high levels of endorsement of their value for young people's futures generally, and in comparison with A levels. As in previous years, perceptions of the value of vocational qualifications were significantly more positive than those relating to the value of the Welsh Baccalaureate. This can perhaps be attributed to greater familiarity with and understanding of vocational qualifications than is the case with the Welsh Baccalaureate.

## 1. Background, research objectives and research method

### 1.1 Background and objectives

Qualifications Wales (QW) was established through the Qualifications Wales Act 2015 as the regulator of non-degree qualifications and the qualification system in Wales. It is a Welsh Government Sponsored Body, independent of government, and is accountable to the Welsh Parliament.

In the Act, one of QW's two principal aims is promoting public confidence in qualifications and in the Welsh qualification system. From 2017 Beaufort Research has been contracted to conduct a survey of the general public in Wales, that measures public confidence in non-degree qualifications in Wales. This report provides results from the latest wave of the survey in 2021.

The overall purpose of the research is to measure public confidence in non-degree qualifications in Wales and in the qualification system and to track attitudes over time.

As in the 2019-20 school year, education in Wales in 2020-21 was severely disrupted due to the COVID-19 pandemic. Schools were closed during the national lockdown in early 2021, with most learning undertaken online, and public examinations in summer 2021 cancelled. Qualifications that would have been sat as examinations in the 2020/21 summer term were awarded through a centre determined grade model. Grades were determined by schools and colleges, based on their assessment of learners' work using a range of evidence, including non-examination assessments, mock exams and classwork.

### 1.2 Methodology

As in previous years, the 2021 research was conducted on the September Beaufort Wales Omnibus survey. The Wales Omnibus survey interviews a representative quota sample of adults aged 16 and over across Wales.

Up to early 2020, interviewing on the Wales Omnibus was conducted face-to-face via CAPI (Computer Aided Personal Interviewing). As a result of the COVID-19 public health crisis, interviewing switched to an online approach using the Cint™ online panel exchange platform. The methodology for the 2020 public

confidence survey therefore changed to online and has remained online for the 2021 survey. The change in data-gathering approach may have resulted in some changes in findings, due to mode effect, and these are highlighted where applicable in the report.

The Cint™ platform and its products comply with ESOMAR, MRS, ARF, MRIA, AMA, AMSRO and Insights Association standards. Cint™ also complies with ISO 20252. Multiple data quality checks are built into the Cint™ system including GEO IP check and CAPTCHA at registration, unique respondent identification and fraudulent behaviour checks. On top of this, Beaufort builds in its own quality control questions and measures within the survey and excludes respondents who fail these checks.

The survey was subject to interlocking demographic quota controls of age within gender. A further separate quota control was set on social grade and questionnaires were completed by residents of every local authority in Wales. At the analysis stage, the data was weighted by age group, gender, local authority grouping and social grade to match Census 2011 figures and ensure it was representative of the Wales population.

The questionnaire for the Qualifications Wales survey comprised a series of questions about qualifications, mostly using a 5-point Likert Scale with an additional 'don't know' response option (see Appendix I). For tracking purposes, the 2021 questionnaire was consistent with that used in earlier years. Demographic questions are also included as standard in the Wales Omnibus survey. The questionnaire was available in English or Welsh at the participant's choice.

1,000 adults were interviewed online between 13 September and 3 October 2021, of which 17 chose to answer in Welsh.

### **Statistical error**

As with any survey, findings for the sample of respondents interviewed provide estimates of attitudes, knowledge and opinions held in the population of interest (in this case, the general public). Consequently, all results are subject to sampling error.

Table 1 overleaf illustrates the reliability of individual results for different sample sizes and percentage results at the 95% confidence level. For example, thinking

about the overall sample of 1,000 respondents interviewed, if 50% said that they know a fair amount about the Welsh Baccalaureate, we could say that the true proportion lies between 46.9% and 53.1% (i.e. +/- 3.1%) 95% of the time. The specified confidence intervals should be used as an approximate guide, given that this survey is based on quota sampling.

**Table 1: Statistical reliability (at 95% confidence level)**

Survey result	Ranges at the 95% confidence level (excluding survey design factors)		
	50%	70% / 30%	90% / 10%
<b>Sample size:</b>			
1,000	+/-3.1	+/-2.8	+/-1.9
750	+/-3.6	+/-3.3	+/-2.2
500	+/-4.4	+/-4.0	+/-2.6
200	+/-6.9	+/-6.4	+/-4.2
100	+/-9.8	+/-9.0	+/-5.9

Whenever differences in the data in this report are commented on as significant, this refers to a statistically significant result from a significance test at the 0.05 level.

## 2. Key findings

### 2.1 Public confidence in AS levels and A levels

The first set of questions focused on AS and A levels and we asked to what extent participants agreed or disagreed with a series of statements about these qualifications. Respondents could strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with each of the statements. As the survey was carried out online, the 'don't know' response option was shown in the prompted list. A brief explanation of AS and A levels was given to participants before the question. In the report 'agreement' has been defined as the aggregate of those 'strongly agreeing' and 'agreeing', while 'disagreement' is those 'strongly disagreeing' and 'disagreeing' combined.

As in previous years, agreement was high that 'AS/A levels are trusted qualifications' and that 'AS/A levels are good preparation for further study', with 78% of adults in Wales agreeing with each statement, and only 4% and 5% respectively disagreeing (see figure 1 overleaf). Levels of agreement with each statement have risen from 2019 (from levels of 70% and 75%) and are now closer to the levels seen in 2019 and 2018 (80% and 82%).

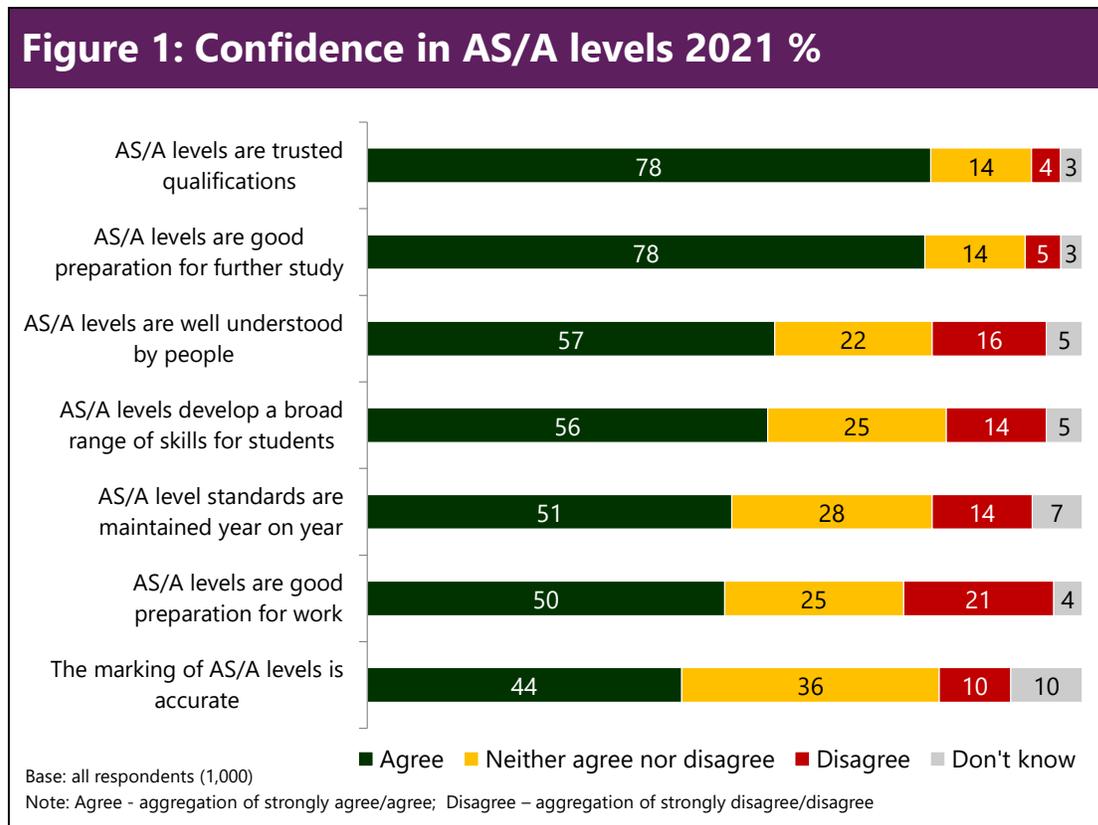
Around six in ten of those interviewed agreed that 'AS/A levels are well understood by people' and 'develop a broad range of skills for students', while around half of the sample agreed that 'standards are maintained year on year' and 'are good preparation for work'. The lowest agreement was evident for 'the marking of AS/A levels is accurate', with 44% agreeing with this statement.

As in previous years disagreement was highest with the statement 'AS/A levels are good preparation for work', at 21% of those interviewed - slightly higher than in 2020 but still lower than in 2019. Disagreement was also slightly higher in 2021 that 'AS/A levels develop a broad range of skills for students'.

The proportion of the population unable to comment on whether 'the marking of AS/A levels is accurate' and whether 'AS/A level standards are maintained year on year' fell in 2021 to the lowest levels seen (10% and 7% respectively). At the same time, the proportion of respondents at the mid-point of the scale (that is, answering 'neither agree nor disagree') remains high for these dimensions (at 35% and 28%). The proportion of respondents answering 'neither agree nor

disagree' to all statements rose in 2020 when the survey approach changed to an online self-completion interview.

This is likely to be related to the change in method, because having an interviewer changes the dynamic of the interview. In self-completion surveys, respondents are more willing to give a neutral answer and to admit they do not know much about the subject about which they are being questioned.



As in previous years, people in the ABC1<sup>2</sup> socioeconomic grades were significantly more likely to agree with most of the statements about AS/A levels

<sup>2</sup> Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

- AB:** Higher and intermediate managerial, administrative and professional occupations
- C1:** Supervisory, clerical and junior managerial, administrative and professional occupations
- C2:** Skilled manual workers
- DE:** Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

than those from socioeconomic grades C2DE. For example, 64% of ABC1s agreed that 'AS/A levels are well understood by people' compared with 50% of those from the C2DE socioeconomic groups.

Unlike the situation in previous years, there were few significant differences in views between age groups. However, younger people aged 16-34 were significantly less likely than both those aged 35-54 and those aged 55+ to consider AS/A levels as 'good preparation for further study'. They were also significantly more likely to *disagree* that they are 'good preparation for work' than older people aged 55+.

Mean scores or averages were also calculated for each of the statements above, using a scale from 1 to 5, where 1 was 'strongly disagree' and 5 was 'strongly agree'. In addition to the individual measures, a composite measure of confidence has been developed for all seven statements. This has been calculated by adding the averages of all questions and finding an overall average.

The composite AS/A level confidence mean score for 2021 is 3.70 out of 5, which is slightly higher than the 2020 score (3.66). Mean scores for each individual statement are shown in figure 2 overleaf and range from 3.41 at the lower end (for being 'good preparation for work'), up to 4.07 (for AS/A levels being 'trusted qualifications').

As in previous years there is a significant difference between the mean scores for AS/A levels being 'trusted qualifications' and 'good preparation for further study' and those for all other dimensions.

**Figure 2: Average confidence measures 2021 - AS/A levels**

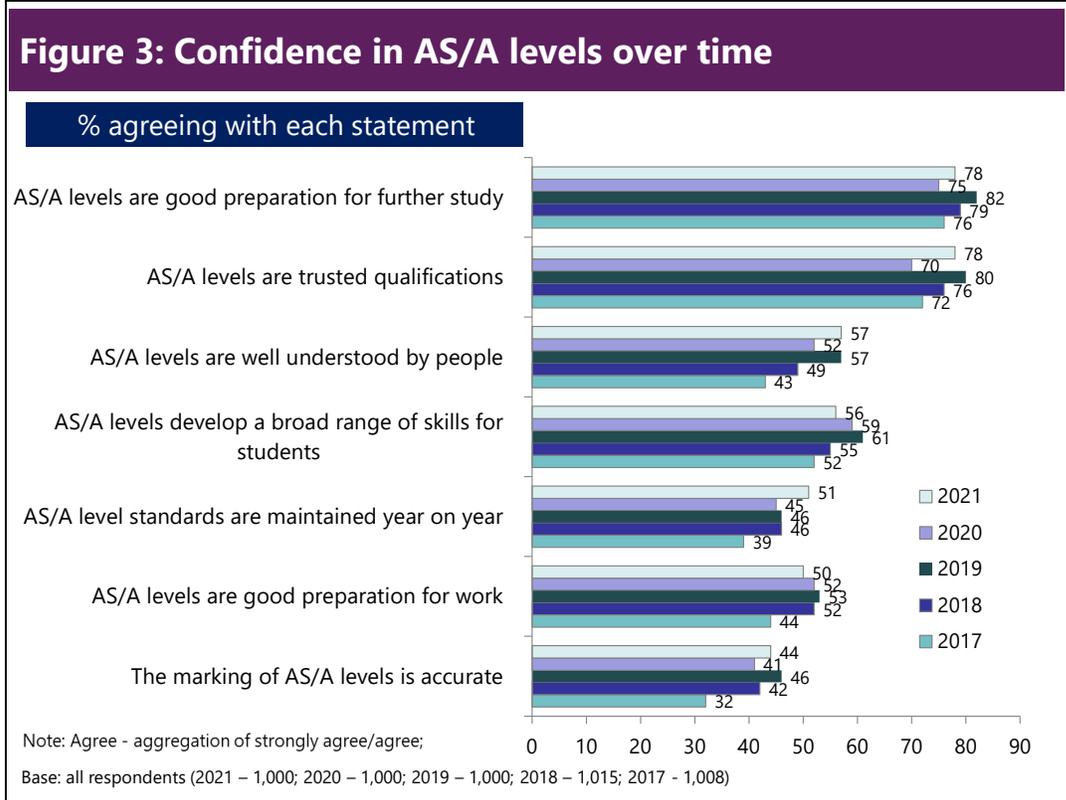
Mean score: strongly agree = 5, strongly disagree = 1



Base: all respondents excluding 'don't knows / refused' (base size varies by statement and is shown in brackets for each)

Looking at trends across the five years of tracking, the latest survey shows that agreement levels have risen in 2021 for most of the statements after falling back in 2020 (see figure 3 overleaf).

The largest year-on-year increases are evident for AS/A levels being 'trusted qualifications' (+8%), 'standards being maintained year on year' (+6%) and being 'well understood by people' (+5%). Agreement with standards being maintained year on year is now at its highest ever level.



## 2.2 Public confidence in GCSEs

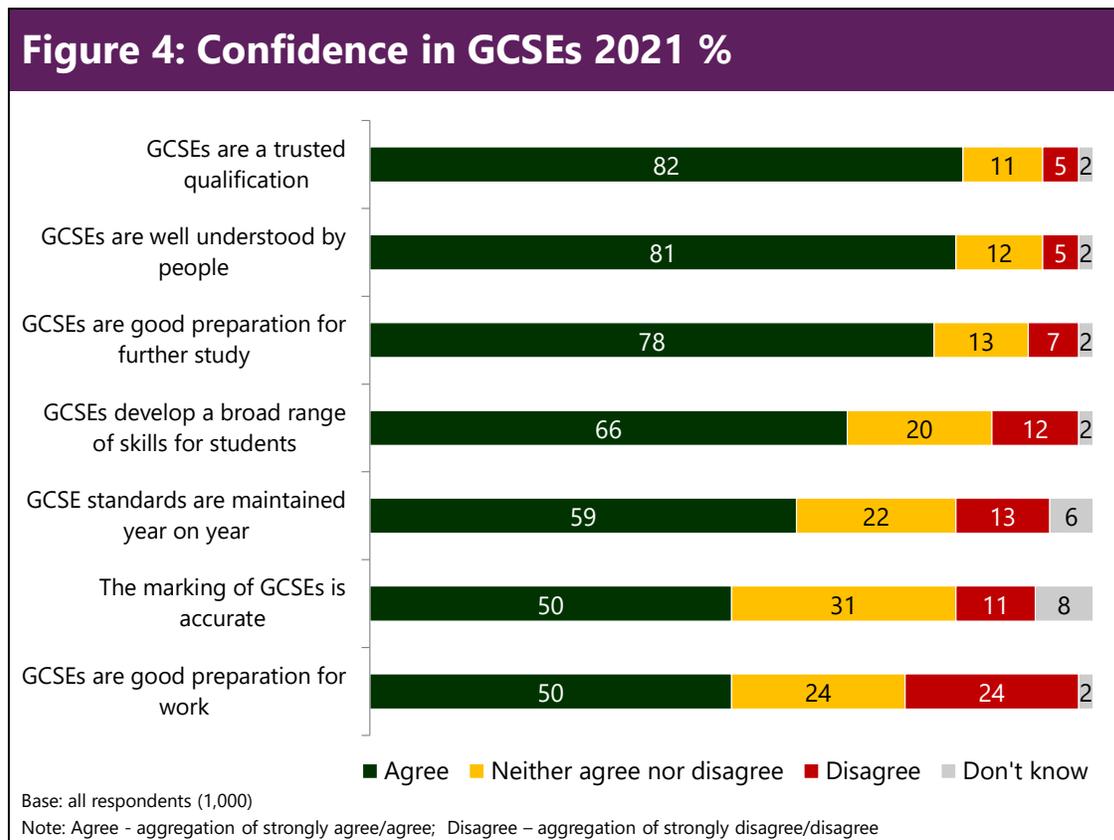
Survey respondents were then presented with a similar set of statements about GCSEs and asked to what extent they agreed or disagreed with each statement. Respondents could strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with each of the statements ('don't know' was also included in the list of response options). A brief explanation of GCSEs was included before the question.

As with AS/A levels, GCSEs were strongly perceived to be 'a trusted qualification' and 'good preparation for further study', with around eight in ten of the population in Wales agreeing with each of these statements and fewer than one in twelve disagreeing. A much higher proportion of the population considered GCSEs to be 'well understood by people' than was the case with AS/A levels, however - 81% agreed that this was the case for GCSEs compared with 57% doing so for AS/A levels.

Around seven in ten of those interviewed in 2021 agreed that ‘GCSEs develop a broad range of skills for students’ while around six in ten considered that ‘GCSE standards are maintained year on year’. (see figure 4 below).

Agreement was lowest that GCSEs ‘are good preparation for work’ and that ‘the marking of GCSEs is accurate’ (at 50% agreeing with each). Endorsement of the latter has risen from the 2020 level (46%), while the former has fallen back year on year (from 54%).

Consistent with previous years’ results and similar to the findings for AS/A levels, a sizeable minority of almost one in four (24%) disagreed that GCSE qualifications are ‘good preparation for work’.



Respondents in the ABC1 socioeconomic grades were significantly more likely to agree that GCSEs ‘are well understood by people’ and ‘are a trusted qualification’ than those in the C2DE groups. 85% of ABC1s agreed with both statements compared with 77% and 80% of C2DEs doing so.

On some dimensions younger people were more negative about GCSEs than their older counterparts. For instance, 16-34s were significantly less likely than 35-54-year-olds to agree that 'GCSEs are well understood by people' (75% cf. 85%), 'are a trusted qualification' (78% cf. 85%) and 'are good preparation for further study' (71% cf. 79%). They were also significantly less likely than those aged 55 and over to agree that they are 'good preparation for work' (at 41% cf. 58%).

Few statistically significant differences were evident by gender, although women were significantly more likely than men to agree that GCSEs 'are good preparation for further work' and 'are a trusted qualification', as in previous years.

As with the statements about AS/A levels, average scores were calculated for each of the statements about GCSEs. The same scale from 1 to 5 was used, where 1 was 'strongly disagree' and 5 was 'strongly agree'. A composite measure of confidence was calculated for all seven statements by adding the averages of all questions and finding an overall average.

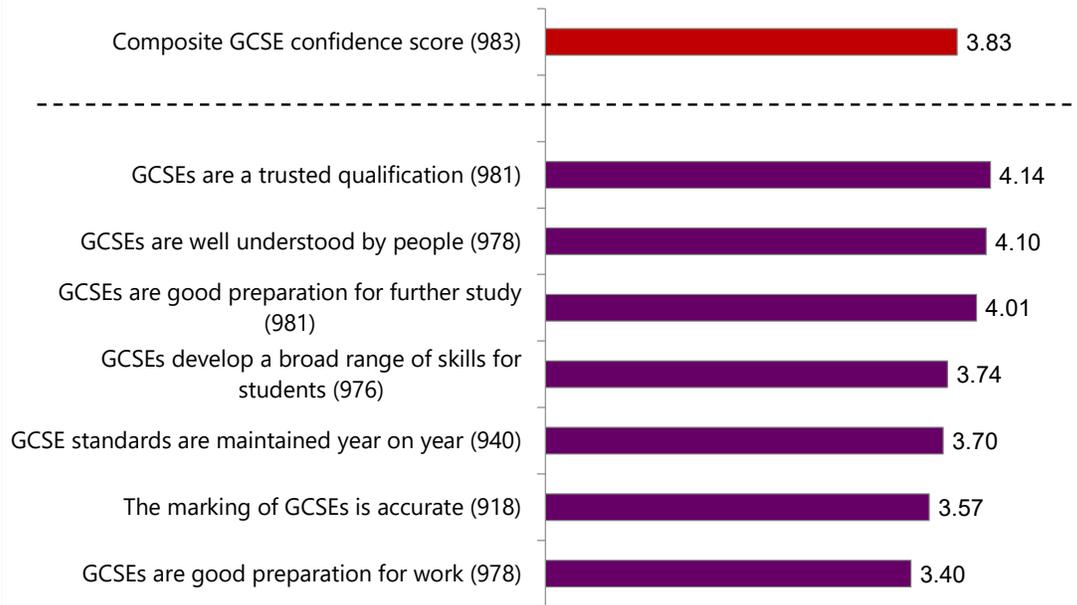
The composite GCSE confidence mean score for 2021 is 3.83 out of 5. As with the AS/A level composite score, this has risen from its 2020 level (3.74) and in the case of GCSEs, is a significant increase year on year. Moreover, the 2021 GCSE composite mean score (3.83) is significantly higher than the corresponding AS/A level composite score (3.70).

Mean scores for each individual statement are shown in figure 5 overleaf and range from 3.40 at the lower end (for GCSEs being 'good preparation for work'), up to 4.14 (for GCSEs being 'a trusted qualification'). As in previous years a significantly higher score was given for GCSEs being 'well understood by people' than was the case for AS/A levels (4.10 in the case of GCSEs, compared with 3.57 for AS/A levels).

The mean scores for GCSEs being 'a trusted qualification', 'well understood by people' and 'good preparation for further study' were significantly higher than those for all other statements about the qualification. This was also true in the case of two of the three dimensions for AS/A levels.

**Figure 5: Average confidence measures 2021 - GCSEs**

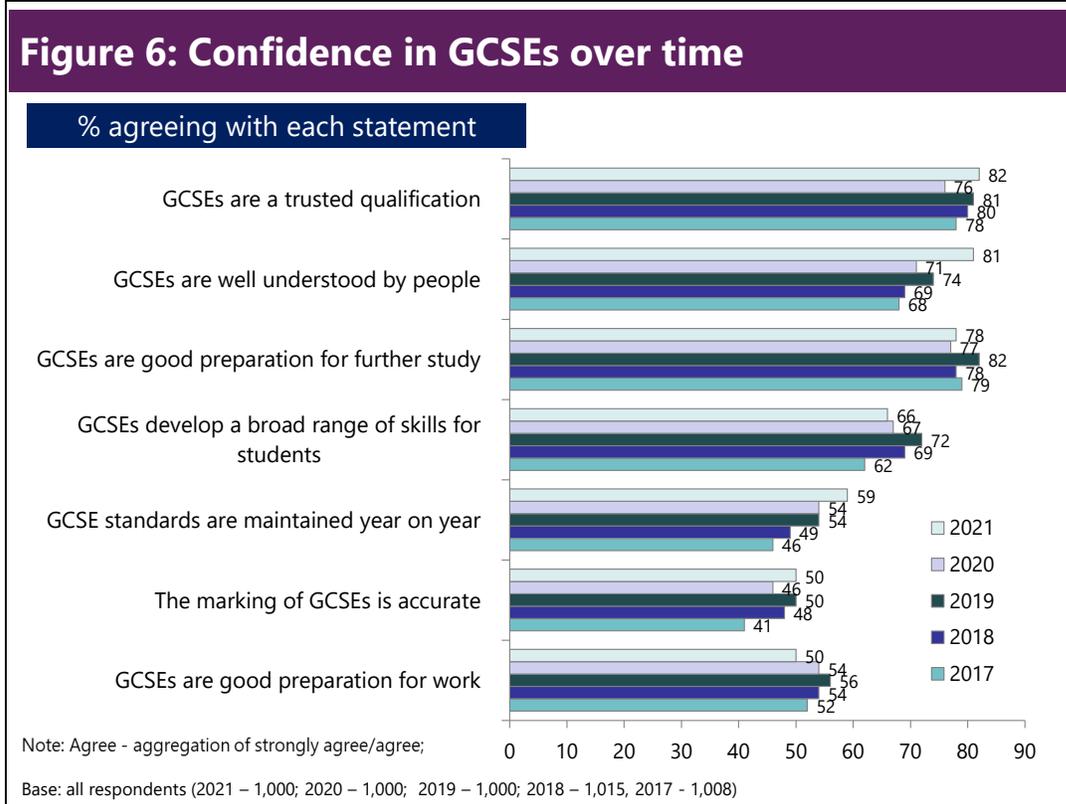
Mean score: strongly agree = 5, strongly disagree = 1



Base: all respondents excluding 'don't know / refused' (base size varies by statement and is shown in brackets for each)

As with AS/A levels, agreement levels for most GCSE statements have increased in 2021 from 2020 (see figure 6 overleaf). The largest increases are evident for 'GCSEs are well understood by people' (+10% year on year), 'GCSEs are a trusted qualification' (+6%) and 'GCSE standards are maintained year on year' (+5%).

Endorsement of 'GCSEs are well understood by people' and 'GCSE standards are maintained year on year' are at their highest ever level in 2021. At the same time, agreement that 'GCSEs are good preparation for work' has fallen back from 2020 (from 54% to 50%) and is now at its lowest level since tracking began.



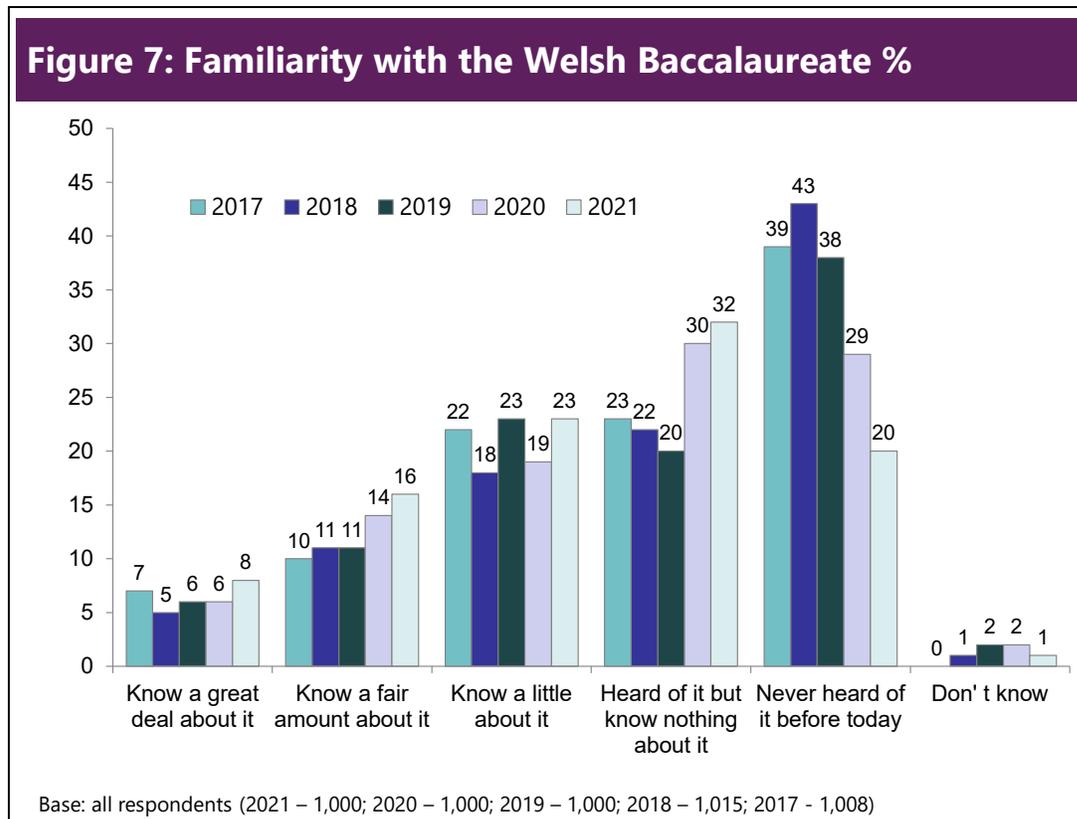
### 2.3 Familiarity with and confidence in the Welsh Bacallaureate

As in previous years respondents were asked about their awareness of and familiarity with the Welsh Bacallaureate. Almost eight in ten (79%) of Welsh adults interviewed in 2021 said they had heard of the qualification, a rise of 10% from the 2020 awareness level of 69%.

Looking at the findings among different demographic groups, awareness of the Welsh Bacallaureate was highest among young people aged 16-24 and those in the AB socioeconomic groups (at 87% among each). Young people were also most likely to be most familiar with the qualification, with 29% of 16-24s saying they knew 'a great deal' about it, compared to just 8% overall saying this.

One in five adults in Wales who were interviewed (20%) had *not* heard of the Welsh Bacallaureate, however. Those least likely to have heard of the qualification were people aged 65+, those in the DE socioeconomic grades and those with no qualifications (with 26%, 24% and 55% of these groups respectively not having heard of it before being interviewed).

Although awareness of the qualification has risen again in 2021, there does not seem to be any increase in familiarity or knowledge of its content. Over half of those interviewed (55% overall) said they had heard of the Welsh Bacallaureate but knew either nothing or only a little about it. 24% overall felt they knew a fair amount or a great deal about the qualification (an increase from the 20% saying this in 2020).

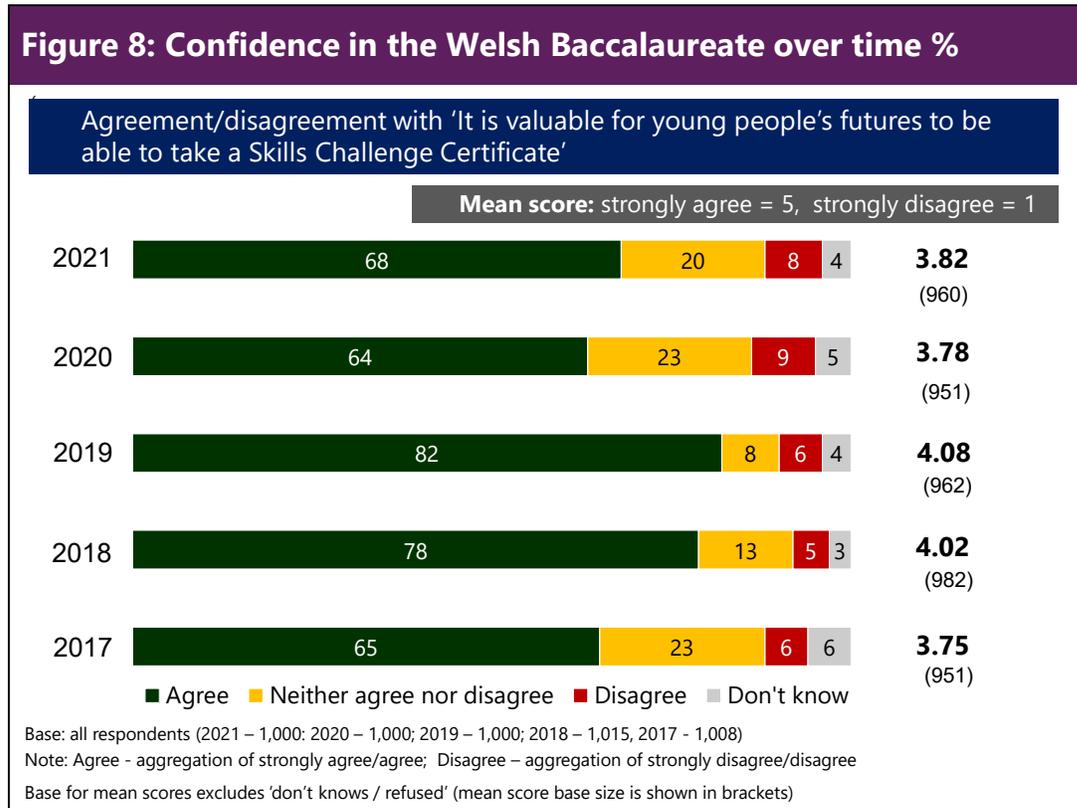


An explanation of the Welsh Bacallaureate and the Skills Challenge Certificate was then shown before respondents were asked whether they agreed or disagreed that it was valuable for young people’s futures to be able to take a Skills Challenge Certificate. The same 5-point scale was used as for the statements about AS/A levels and GCSEs earlier in the interview, together with a ‘don’t know’ response.

Agreement that ‘it is valuable for young people’s futures to be able to take a Skills Challenge Certificate’ has risen to 68%, from 64% in 2020, but is still below the levels seen in 2019 and 2018. As in 2020, this is due to larger proportions of people neither agreeing nor disagreeing with the statement than in those years,

rather than any major change in the level of disagreement year on year (see figure 8).

The mean score of 3.82 for this statement in 2021 is slightly higher than the 2020 mean (3.78), but the increase is not statistically significant.



## 2.4 Public confidence in vocational qualifications

Participants were also asked for their views on vocational qualifications, covering a range of work-related subjects taken in school or Further Education colleges. Respondents were prompted with two different statements about vocational qualifications and asked to what extent they agreed or disagreed with each.

Just over eight in ten adults in Wales in 2021 agreed that 'vocational qualifications, taken in school, are valuable for young people's futures', while around seven in ten agreed that 'achieving a vocational qualification at age 18 instead of A levels is at least as valuable for young people's futures as achieving A levels'. Levels of disagreement with each statement remained low – at 2% and 8% respectively (see figures 9 and 10).

These figures were very similar to those seen in 2020. As in 2020, agreement levels are lower than in 2019 and 2018 due to a higher proportion of respondents at the mid-point of the scale, rather than any major change in levels of disagreement (likely to be related to the change in interviewing method).

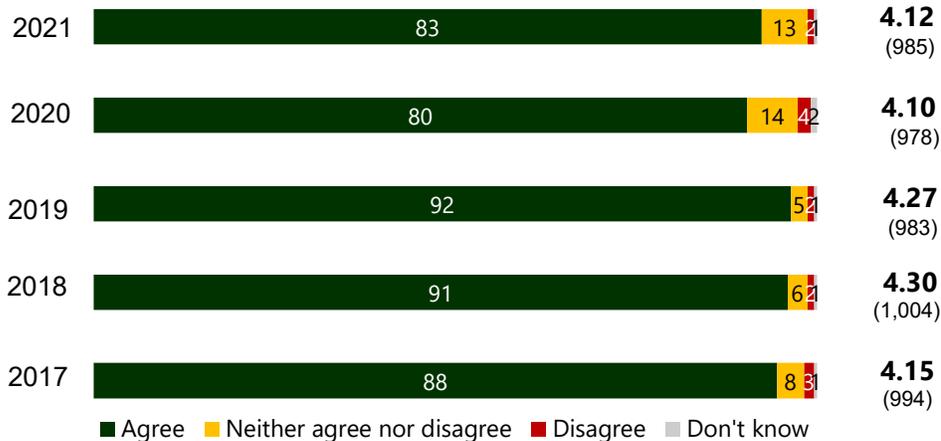
The mean scores for these statements for 2021 were almost unchanged from 2020 (at 4.12 cf. 4.10 and 3.90 cf. 3.91 respectively).



**Figure 10: Confidence in vocational qualifications over time - II %**

Agreement/disagreement with 'Vocational qualifications, taken in school, are valuable for young people's futures'

Mean score: strongly agree = 5, strongly disagree = 1



Base: all respondents (2021 – 1,000; 2020 – 1,000; 2019 – 1,000; 2018 – 1,015; 2017 - 1,008)

Note: Agree - aggregation of strongly agree/agree; Disagree – aggregation of strongly disagree/disagree

Base for mean scores excludes 'don't knows / refused' (mean score base size is shown in brackets)

As in previous years, perceptions of the value of vocational qualifications were significantly more positive than those relating to the value of the Welsh Baccalaureate. There is a significant difference between the mean score for 'Vocational qualifications, taken in school, are valuable for young people's futures' and that for a similar statement about the Skills Challenge Certificate ('It is valuable for young people's futures to be able to take a Skills Challenge Certificate').

## Appendix I

### Survey questionnaire

#### B02110\_3 September Wales Omnibus 2021 Qualifications Wales Questions FINAL

##### ASK ALL

**Q1. We'd like to ask you some questions about your views on qualifications in Welsh secondary schools and colleges. Firstly, some questions about A levels and AS levels.**

**AS levels are taken at the end of the first year of sixth form (year 12) or college. The result from an AS level contributes to the overall A level grade. A levels are taken at the end of the second year of sixth form (year 13) or college. To what extent do you agree or disagree with the following statements about A / AS levels?** *Scale: strongly agree, agree, neither agree nor disagree, disagree or strongly disagree, don't know* ORDER OF STATEMENTS RANDOMISED

- i) AS/A levels are well understood by people
- ii) AS/A levels are trusted qualifications
- iii) AS/A level standards are maintained year on year
- iv) AS/A levels are good preparation for further study
- v) AS/A levels are good preparation for work
- vi) AS/A levels develop a broad range of skills for students
- vii) The marking of AS/A levels is accurate

##### ASK ALL

**Q2. Now some questions about GCSEs. GCSEs are the main qualifications usually taken by learners aged 15-16 after two years of study.**

**To what extent do you agree or disagree with the following statements about GCSEs?** *Scale: strongly agree, agree, neither agree nor disagree, disagree or strongly disagree, don't know* ORDER OF STATEMENTS RANDOMISED

- i) GCSEs are well understood by people
- ii) GCSEs are a trusted qualification

- iii) GCSE standards are maintained year on year
- iv) GCSEs are good preparation for further study
- v) GCSEs are good preparation for work
- vi) GCSEs develop a broad range of skills for students
- vii) The marking of GCSEs is accurate

**ASK ALL**

**Q3. The Welsh Bacallaureate is taken in schools and colleges. How much, if anything, do you know about what the Welsh Bacallaureate is?**

- A great deal
- A fair amount
- A little
- Heard of it but know nothing about it
- Never heard of it before today

Don't know

**ASK ALL**

**Q4. The core of the Welsh Bacallaureate is the Skills Challenge Certificate, which is a standalone qualification. The intention of the Skills Challenge Certificate is to develop life and work skills such as critical thinking, problem solving, planning and organisation. To what extent do you agree or disagree with the following statement about the Welsh Bacallaureate? Scale: strongly agree, agree, neither agree nor disagree, disagree or strongly disagree, don't know**

- i) It is valuable for young people's futures to be able to take a Skills Challenge Certificate

**ASK ALL**

**Q5. Many young people take vocational qualifications in Further Educational Colleges instead of taking A levels. These vocational qualifications cover a range of work-related subjects. To what extent do you agree or disagree with the following statement? Scale: strongly agree, agree, neither agree nor disagree, disagree or strongly disagree, don't know**

- i) Achieving a vocational qualification at age 18 instead of A levels is at least as valuable for young people's futures as achieving A levels

**ASK ALL**

**Q6. Some young people in schools take vocational qualifications alongside their GCSEs. These vocational qualifications cover a range of work-related subjects.**

**To what extent do you agree or disagree with the following statement?** *Scale: strongly agree, agree, neither agree nor disagree, disagree or strongly disagree, don't know*

- i) Vocational qualifications, taken in school, are valuable for young people's futures

**ASK ALL**

**Q7. Are you in education or do you have any children in any of the following situations? Tick all that apply**

- Yes – I have a child/children in primary school  
 Yes – I have a child/children in secondary school or sixth-form college  
 Yes – I have a child/children at university or college  
 Yes – I'm at secondary school or sixth-form college  
 Yes – I'm at university or college  
 No

**ASK ALL**

**Q8. Thinking now about yourself, what is your highest level of educational qualification? Tick one only**

- GCSE, O level, O-Grade, Standard Grade or similar  
 A level, Higher, Sixth Year Study or similar  
 HNC or HND  
 First Degree  
 Higher Degree  
 No qualifications  
 Still in education  
 Other

Don't know