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Managing the student experience in English higher education: Differing responses to market pressures

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This paper reports on recent research aimed at assessing how the management of the undergraduate student experience in English higher education is changing in the light of the new tuition fee regime introduced in 2012, as well as other government policies aimed at creating market-type pressures within the higher education sector. A distinction was observed between the research-intensive universities studied – defined here as institutions where research income comprised 20 per cent or more of total turnover, with correspondingly strong positions in published research-based rankings – and universities largely dependent on income from teaching, with weaker market positions. Broadly speaking, the latter group were responding to market pressures by centralizing services, standardizing procedures, and strengthening management controls over teaching processes. The research-intensive universities tended to work within existing institutional cultures to respond to students' needs. Organizational change here usually took the form of creating more coherent functional groupings of student services, rather than comprehensive reorganizations. It appears to us that these different responses to a changed environment point to the creation of two distinct English university types, one strongly managerial with 'student as customer' orientations, and a smaller group with less centralized, more collegial cultures.

Keywords: higher education management; student experience; student as customer; tuition fees

Introduction

This paper reports on research undertaken in 2014 aimed at assessing how changes to the English[1] higher education 'landscape' were affecting the undergraduate student experience, whether institutions were responding to these changes in different ways, and the effectiveness of these changes. The research focused on how institutional management decisions were affecting the student experience, rather than on teaching and learning activities. We appreciate that many accounts of the student experience include aspects of teaching and learning (for example, the *Times Higher Education* student experience survey of UK universities does so), but we consider it helpful to distinguish between the two. Of course, the boundaries between our definition of the student experience and student teaching and learning must be imprecise. Because many of our fieldwork discussions involved the tuition fee regime introduced in 2012, the focus of the study tended towards UK/EU undergraduates – those affected by the new fees – rather than international students. We also focused primarily on the experiences of full-time rather than part-time undergraduates.

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[1] There are significant differences between the component entities of the United Kingdom in matters of higher education provision; this study deals exclusively with the position in England.

We conceptualized our study in terms of 'the student journey', which we divided into four components:

- *the application experience*: covering the interactions between potential students and the institution, up to the point of arrival
- *the academic experience*: students' interactions with the institution associated with their studies
- *the campus experience*: student life not directly connected with study, which may include activities away from the actual campus (insofar as one exists)
- *the graduate experience*: the institution's role in assisting students' transition to employment or further study.

Just as our distinction between what we regard here as the student experience and teaching and learning is imprecise, so the boundaries between our student journey categories must be blurred: aspects of 'the campus experience' – for example, student social life and the standard of accommodation – will affect a student's 'academic experience', as will the organizational issues surrounding learning in which we are interested here. Our student journey conceptualization also allows us to draw on a number of theoretical underpinnings – human capital theory in relation to the academic experience, and social capital theory in relation to the campus experience.

Six English institutions were selected for study on the basis of criteria reflecting their research-intensiveness: two from the group of institutions where research income constitutes 20 per cent or more of total income (21 institutions; all institutional data as available in 2013) – our 'R' cases; two from the median group of 42 institutions, where research income is below 20 per cent and above 3 per cent of total income (taking all UK institutions, 3 per cent is the median figure) – our 'X' cases; and two from the group where research income is 3 per cent or less of total income – our 'T' cases. We took research income as a proxy for institutional status as it currently exists in English higher education. The fieldwork was carried out in the first half of 2014. We appreciate that ours is a very small sample of the relevant institutional population and our findings must accordingly be considered as limited and provisional. Further studies are needed to support or to challenge the claims that we make here.

The changing English higher education landscape

The idea of the student experience, as a set of linked activities to be managed institutionally, is a relatively recent one. The term has multiple meanings, and the list of what it might include is lengthy. It is also important to acknowledge that each student's experiences will be unique: there is a risk that references to '*the* student experience' will suggest a degree of uniformity that cannot exist in practice. However, in this study we focused on institutionally-intended patterns of the student experience, in areas over which institutions can have some influence. We were interested in aggregated impressions of the student (non-learning) experience, as perceived by university managers, not, generally, by the students themselves.

Although there is plentiful literature over several decades on 'the experiences of students', mostly in terms of teaching and learning for particular classes of students (part-time, international, and so on), thinking about the student experience in a more holistic sense effectively dates back only to the 1990s. In the UK, Haselgrove's edited book, *The Student Experience* (1994), was a pioneer in tracking what would now be called the student journey, presented in the book in sections headed 'getting in', 'being there', and 'moving on' – similar to our own categorization. The literature on the student experience is one of three major areas broadly covered by research on student engagement (Trowler, 2010). However, the most extensive student engagement research

focuses on learning and teaching (for example, Ashwin, 2009; Ashwin, 2014), which lies outside the remit of our study, but does includes research on extracurricular activities (for example, Holdsworth, 2010; Stevenson and Clegg, 2011).

Because the idea of 'the student as customer' features significantly in this research, we should consider the implications of this characterization. Staddon and Standish (2012) have challenged it on the grounds that it:

> puts students in a relation to their learning that is very different to what has traditionally been the case ... authority is now being ceded to the novice ... to see student choice as the arbiter of quality is an abnegation of responsibility on the part of providers of higher education. Standards are not being raised but abandoned.
>
> (Staddon and Standish, 2012: 635)

Furthermore, it has been observed that evidence is lacking as to whether there is any causal relationship between good student satisfaction scores – suggesting satisfied 'customers' – and educational quality as assessed by measures such as student performance and learning gain (Gibbs, 2012: 14).

The argument that student views have limited value is less persuasive when applied to support services of various kinds. Generally in our case studies reported on here, services such as catering and accommodation are operated on what might be considered to be straightforward principles of supply and demand: students are indeed the customers of these services. Other student-facing university services such as admissions, academic administration, student advice and support, and careers guidance, while not operated on commercial principles in the usual sense of the term are clearly providing services to student (and potential and former student) users, if not exactly to customers in the strict sense. This is because, unlike with catering or student accommodation, there is not an alternative university registry to which students can turn if dissatisfied with the one on offer. Nor are direct payments from users practicable for most of these services. It might be argued here that student views or 'voice' should form an important indicator of the effectiveness of these services (and they are certainly widely sought), but not necessarily the decisive one.

The increasing salience of the idea of the student experience in the literature and in professional debates in England is associated with the introduction, first, of 'upfront' undergraduate means-tested tuition fees in 1998, and with the later loan-based fee regimes introduced in 2006 and, in altered form, in 2012. These fee regimes were in turn associated with the appearance of various student surveys (sometimes about 'satisfaction'), predating the appearance of the National Student Survey (NSS), which was introduced in 2005, and which has operated annually since then. The NSS results may now be compared with the findings of the annual Higher Education Policy Institute–Higher Education Academy (HEPI–HEA) Student Academic Experience Survey. The HEPI–HEA Survey does not, however, produce institution-level data and is probably best known for its findings on student contact hours and workloads, although unlike the NSS it surveys first- and second-year students. NSS results can also be compared with the annual *Times Higher Education* Student Experience Survey, which does publish institution-level data (but not subject-level data) on student views about the quality of teaching, but with an emphasis on student social life, the campus environment, and other non-academic matters. These developments, along with other government higher education policies (set out in the White Paper *Higher Education: Students at the heart of the system* (BIS, 2011)) aimed at creating market-like mechanisms and increased competition between institutions in England, helped to crystallize the idea of the student experience as it is now understood (Baird and Gordon, 2009). Certainly, in the UK more detailed information than ever before is now available on student views at undergraduate and postgraduate levels on all aspects of their academic and broader

experiences as students. Market-related changes in other higher education systems, for example in Australia (Meek and Wood, 1997), but also elsewhere in Europe (for example, Sarrico and Rosa, 2014; Vuori, 2013), have led to parallel thinking about the student experience as a relatively distinct higher education management function. Reflecting this focus of concern, it is probable that all UK higher education institutions now have a second-tier post (pro-vice-chancellor or similar) with broad responsibilities for the student experience.

The new student fee regime, introduced in England in 2012, has, as we will show, been the single event that our respondents considered as having the greatest impact so far as the management of the student experience is concerned. All the universities we studied had set the maximum allowable undergraduate tuition fee of £9,000 per year, and although they were not competing on price – as nearly all other universities had set the same fee, or one very near it – competitive pressures had nevertheless increased, partly because of government controls on student numbers to limit the costs of the tuition fee loan scheme. It will be interesting to see the effects of the removal of these controls on student numbers, which occurred in 2015.

There have been other significant changes in the higher education landscape. The 2011 White Paper identified improving the student experiences as one of three challenges that the government's reforms sought to tackle (the others were financial sustainability and social mobility). It declared that 'institutions must deliver a better student experience; improving teaching, assessment, feedback and preparation for the world of work' (BIS, 2011: 4). In addition, it indicated the government's wish further to increase competition by encouraging higher education work in further education colleges and in private providers, both for-profit and non-profit, and also by making it easier for smaller institutions, without significant research profiles and with limited subject ranges, to gain a university title. These changes must have increased competitive pressures for some institutions, although it is hard to gauge by how much. Taken together, however, they have formed a higher education landscape that is fluid and unpredictable, with major challenges for institutional leaderships and their academic and professional staffs.

Our findings

The two universities that we studied where research income as a percentage of total turnover was 3 per cent or below we refer to as T1 and T2; the two in our middle category we refer to as X1 and X2; and the two in our research-intensive category, where research income as a percentage of total turnover was 20 per cent or above, as R1 and R2.

When seeking the cooperation of institutional managements, we assured them that they would not be identifiable from our report. We later offered the same assurance to individual respondents. This means that we are severely constrained over the amount of contextual information that we can give about them, without making the identities of institutions – and therefore in some cases the identities of informants – reasonably apparent. We can however say that R1 and R2 are long-established, major research universities with global reputations, located in large English cities. X1 and X2 each have different twentieth-century institutional origins, and are located on the edges of major conurbations. T1 and T2 are both former polytechnics, one in a northern English city and one in the south. We interviewed a range of management staff at each institution (between eight and ten at each place) responsible for different aspects of the student experience: the job titles of our interviewees naturally varied between institutions, and there were wide variations of individuals' experiences in higher education generally and in the particular institution. A focus group of some 15 higher education managers from a range of institutions provided further data. The reasonably consistent pattern of responses that we

received suggested to us that we were investigating a phenomenon that was apparent, though in various dimensions, to staff with different backgrounds, in different institutions.

The application experience

Our cases indicate that undergraduate recruitment and admissions processes have become more competitive between institutions, and more closely managed within them. Centralization of the processes, moving direct responsibility away from academic departments, had taken place to varying extents, in all our cases. The head of admissions at X1 noted that the whole process was utterly changed compared with ten years before. Student recruitment there, as elsewhere, is a focus of management attention, monitored closely through performance indicators. Responsibility for student recruitment and admissions in our cases typically lies within the management structure covering student experience matters, although marketing departments (typically reporting separately) are also involved – through market intelligence work, and website and prospectus preparation, for example.

Our case-study universities were following the system-wide trend of increasing their spending on recruitment marketing (Clarke, 2014). This meant, as one senior manager in T1 noted, that T1 and all its competitor universities 'in a crowded marketplace' were devoting more management time and spending more money in efforts simply to maintain their market share (given that total UK/EU student numbers were, at the time of the research, capped, and demographic and other changes were limiting the size of the potential student population). R1 and R2, though in a different market segment, were in a similar position, as some of their competitor research universities were becoming slightly less demanding over admissions qualifications and therefore more attractive to some applicants. The current, effectively standard, £9,000 fee level created marketing challenges in universities such as T1, because of the (arguably) implicit claim that they were of a comparable academic standard to famous research universities. Similarly at X2, it was thought that students found it hard to understand why what is essentially a 'recruiting' university charges the maximum permissible fees. In contrast, at R1 the fee level was not considered to be an issue of overriding significance: it was thought that students appeared to take it for granted. At R2 it was suggested that students responded to the higher fees in terms of expecting better 'value for money', particularly in terms of more accessible services, while not adopting a consumer mentality as such.

Potential students frequently used social media sites to obtain more information about universities and courses, ignoring (it was widely believed) official sources of information. As a result, at T1 a paid graduate intern, managed by the central marketing department, was placed in each academic department with the task of fielding Facebook and Twitter queries from potential and current students. The picture was similar at R1, where paid graduate interns were also used. Social media figured largely in R1's strategy for communications with students, which ran in parallel with the administrative processes going through from application to graduation. At X2, senior managers considered early communication with prospective students as a crucial stage in the student journey that 'sets the context' for later experiences. Effective communication may reduce the number of students who drop-out in their first year. It was thought that this often happens because students come with mistaken expectations, which could have been corrected through more effective communications. It was noted generally that students using these technologies expected instant responses. Other recent research confirms the emphasis that institutions now place on using appropriate channels to communicate with their students (BIS, 2014: 58).

The higher fee level seemed to have led to more churn in the system at T1. It was thought that more people were not responding to offers, perhaps because they were considering options outside of higher education, such as apprenticeships or other work-related options. Senior staff at T2 thought that now students often asked themselves, 'Do I really want to come into higher education, will it be value for money?' Changing government policy on immigration issues was mentioned at R2, a university with a large number of international students. The university employed a full-time member of staff simply to ensure compliance with immigration regulations. Increased parental involvement in the student experience was noted across all institutions. At R1 it was thought that parents now played a greater role in the choice of a university – hence its emphasis in its marketing on its international reputation and its reputation with employers, something thought to be more significant in the eyes of parents than in the eyes of many prospective students.

The management task for the student admissions experience now involves greater emphasis on the presentation of the university, both before and during visits by potential students and their parents, so as to improve application and conversion rates; more effort given to the induction of students and the management of their expectations; and a need to respond rapidly – preferably almost instantly – to digital queries. All this applies equally to the R universities, but in some cases in a different sense: one of our respondents referred to presentation being about the 'global positioning' of the university, as much as being about attracting applicants.

The shifting landscape appears to have affected the admissions aspect of the student journey, causing it to be managed even more closely in all our cases, usually involving organizational change, and centralization, of some kind. Our respondents generally considered that the various admissions-related measures introduced had proved to be effective – at least to the extent of broadly maintaining each institution's position in the marketplace.

The academic experience

The changing landscape, often in relation to the new fee regime, has caused reviews and subsequent restructuring of academic and related services to be undertaken in all our case-study institutions, although often local factors also played a part. There was a widespread view that, in order to remain competitive, universities had to respond effectively to student views on a wide variety of academic-related issues. At R1 and R2, this was driven by powerful concerns about their NSS scores in both cases being below those of comparator institutions. Student recruitment was considered to be strongly affected by the positions of the two universities in the league tables, which in turn were affected by NSS results. At R1, a wide-ranging restructuring of functions related to student experience, covering recruitment, admissions, academic administration, student support, accommodation services, and careers services had been undertaken in 2010 to address this concern, and appeared now to be bearing fruit in terms of improved student survey results. This had involved simplifying lines of control and improving communications, rather than (for example) merging functions into larger groupings. These changes were also believed to have sent an important signal internally, that the student experience was regarded as a key issue by the university's top management. Restructuring of student services had also taken place very recently in R2, where there was similar concern about poor NSS scores.

Academic staff in all our cases were being required to respond to increased student expectations, which had led to tensions in places. At T1, for example, there were guarantees about the timescale for the return of written work. At R1, examples of good practice in other departments were highlighted to encourage academic staff to help improve the student experience – 'They can get better NSS scores by changing their practice, why can't you?' The

institutional culture here would not, it was believed, support a more dirigiste approach – which in any case was considered unnecessary: the dynamics of collegial volition seemed to work well. Better academic–management relations were stressed at T2 as a way of making academic staff more aware of student experience issues, for example by ensuring that the library was aware of changing course requirements. What is apparent in our X and T cases is that respondents reported that students do not in general see the new fee levels simply as a development of the previous fee regime, but as qualitatively different, putting them in a new position vis-à-vis the university: 'Every single thing comes back to the money question' (i.e., fee levels), said a Students' Union officer at T2. This concern with fee levels did not feature in such a pronounced way at R1 and R2 in terms of student relations with academic and professional staff, although fee levels certainly appeared to be a concern to most students. A Students' Union officer at R2 had, however, detected a change in culture as a result of fee levels and marketization generally (although he personally believed that it was unhelpful for students to see themselves as customers with rights).

In many cases, reviews of administrative services had resulted in greater centralization of decision-making, which, it was sometimes argued, may not always be in the best interests of the students that the changes were designed to serve. At T1, faculty staff complained that a standard figure for class contact hours per module had been imposed in response to student complaints, even though some modules (in the view of academic staff) required more hours, while others needed fewer. At X1, a wide-ranging centralization of professional services had recently taken place, which had severely reduced professional staff numbers in the faculties. The enlarged, central student support department now had some 350 staff. A key benefit claimed for this was the more consistent application of policies and provision of information to students, but at the price of loss of immediate personal contact and detailed knowledge of faculty business: 'efficiency at the price of effectiveness' was a comment by a faculty-based staff member about a similar move at T1. This centralization was seen as causing an important cultural change, which, some respondents believed, had created a new sense of enthusiasm. Others were less positive about its effects. Similar changes had taken place at R1, although here all central services were required to have a student experience 'champion' and an action plan, the implementation of which was monitored, but not directed, by the head of student experience. There had been some centralization from faculty level at R1, but more emphasis was placed on developing cross-cutting themes (e.g. student communications) that could be pursued collaboratively in different service departments across the (very large) university. A similar approach, based on action plans at departmental level rather than widespread reorganization, was being pursued at R2.

All our case-study institutions had placed greater emphasis on enhancing the quality of teaching and learning, a process usually begun before 2012, but given added emphasis since then. Other recent research confirms this trend (BIS, 2014: 18). This emphasis applies to the R institutions, which had become more prescriptive about teaching and learning matters, aiming to reduce the discretion available to individual academics in matters such as assessment and feedback. This usually involved issuing guidelines, rather than instructions: 'Using the big stick won't work here' was a comment made by a senior central manager at R1. R1 has a pro-vice-chancellor-level post for teaching and learning, the holder of which works closely with the head of student experience (although there is no formal reporting line). X1 had created internal knowledge-exchange networks on different aspects of teaching and learning, and had a scheme to reward staff financially for outstanding work in this area. At T1, while its research profile was modest, there was increasing recognition that research could affect teaching positively and this provided another reason for encouraging research work. Turnover of academic staff at T1 had increased when it became apparent that some members of staff were unable to adjust to a higher

level of performance, which it was now considered that students demanded. At X1, there was a view that the centralization of the university administration (with the large central department noted above) had created a 'them and us' feeling so far as academic staff were concerned.

Library and learning resource units had usually seen changes in student attitudes towards their services. 'We're paying £9K, why haven't I got access to the resources I need, why am I still being asked to buy certain books?' was a view reported by a senior librarian at X1. Even at R1, where the impact of increased fees was generally felt to be slight, a more assertive student attitude had been noted. The higher fee levels had produced student objections to paying library fines at T1, and there had been examples of student resistance to disciplinary action over inappropriate behaviour in the library, on the grounds that 'customers' could do as they wished. The new fee level had led T1 to provide mandatory equipment (e.g. safety glasses) free, where previously they had been charged for: it had become widely accepted that the higher fee had to be seen as 'buying' more than the previous fees did.

Some library buildings have adopted 24/7 opening, and in some cases this predated the fee changes. This had the benefit of helping NSS scores on access to learning materials – 'a quick win' was how it was described at R2. The installation of Wi-Fi in student residences and the provision of a laptop loan scheme through the library brought similar benefits. The importance of improving NSS scores was mentioned often at all institutions, although (as noted) only at R1 and R2 was it considered a greater driver of change than increased fees. Students' expectations of IT facilities were increasing continually as technology advanced, and they were quick to be critical of any perceived failings in this area. Central teaching and learning managers at T1 believed that investment in digital technologies had enhanced the student learning experience, despite some reluctance to embrace these new opportunities on the part of 'traditionally-minded' academic staff. A T1 faculty view, by contrast, was that student reliance on material from the Virtual Learning Environment could lead to non-attendance at lectures, disengagement, and eventual drop-out. Simply responding to student demands for constant upgrades of technologies was not necessarily the correct approach, it was suggested. More generally, the view at R1 was that it was important for students to appreciate that the university was listening – even if it did not accede to every request.

Substantial organizational changes had taken place at all our case-study institutions, some directly driven by the need to respond to raised student expectations, others (in the R institutions) aimed at improving the student experience with NSS scores in mind – although here too changed student expectations had an effect. Most of these changes had only taken place in the last two or three years, and so it is hard to judge their effectiveness, although some positive results are reported (improved NSS scores at R1, for example). The institutional cultures at the two R universities seem to have affected the type of changes and the way in which they are being implemented, being less top-down and directive than in the T and X institutions.

The campus experience

There had generally been efforts both to improve the campus experience in terms of physical facilities and to help improve the possibilities of social interactions. T2 had made major capital investment in centralizing on one campus, and although this predated the current fee regime it did allow the university to point to a benefit of studying there: 'the experience outside the classroom has been stepped up', said a Students' Union officer. X1 was pursuing a similar strategy of concentrating resources on its main campus to provide improved facilities and also to encourage the mixing of students in different academic fields. R1 was also pursuing an estates strategy to

create a more unified campus, to enhance a 'sense of belonging' in its inner-city location, including having achieved an agreement to pedestrianize a main road separating university buildings.

At T1, efforts had been made to provide more social spaces, turning the refectory into a more flexible space for shared learning, for example. Similar developments were being pursued at X1, to create 'breakout' spaces where students could work and socialize between classes. At R1, a 24-hour 'learning commons' had been created, allowing students to work in groups and individually with high levels of IT facilities. Other recent research has found that improvements to library and related facilities have occurred widely across the sector in the last two years (BIS, 2014: 51).

At X2, campus services (catering, residential accommodation, sports facilities, and so on) were operated by a central directorate aimed at providing high-quality services to students. This was a recent response to increasing student demands for improved services, linked to the new fee levels. There was also an emphasis at X2 on developing links between the campus and the local community, with a view to widening the student experience by offering more interactions with organizations beyond the university. At R1, all these activities came within the remit of the student experience directorate.

University managements seem to be paying more attention to their universities as physical entities, with the realization at all our case-study universities that the look and feel of the place affect both recruitment and the development of a coherent university community – with benefits for student learning. Some of the changes, planned and undertaken, are long-term and involve major capital investment, but others are more modest in scale – the creation of more welcoming social spaces, and the introduction of multi-functional areas in what were previously specialist areas, for example.

The graduate experience

Student employability was a central concern in university planning. It was often uppermost in the minds of applicants. A senior manager at T2 said that for many, 'getting a good job was part of a good student experience'. A careers adviser at T1, however, considered that some students showed a lack of interest in preparing for work, seemingly on the grounds that they had 'bought their degree' with their fees, and that a job somehow came attached. At R1, students were encouraged to think more broadly about 'my future' rather than about employment as such, although achieving a high proportion of graduates working in professional jobs soon after graduation was an important performance indicator for the student experience directorate. Similarly at R2, the emphasis on student employment was relatively recent, and had led to an expanded careers service with employer-engagement and placement staff now attached to faculties.

It was widely considered that students' emphasis on employability, which had been on the rise for about ten years, was related more to the labour market generally than to the fee regime or to the inclusion of employment figures in rankings tables. The universities had typically responded by bringing together the previously separate functions of finding students part-time work, student placements, volunteering, and final-year careers advice into a single operation. All of our case-study universities placed emphasis on providing students with the skills that it was considered they would need in the labour market. However, at both X1 and T1 there was some concern expressed by academic managers that this emphasis on employability came at the cost (as a member of staff at T1 put it) of some of the 'wider ideals of the university'. Surprisingly perhaps, R1 and R2 appeared to have been able to integrate employment-related topics into academic curricula, in at least some instances, seemingly without tensions arising.

Conclusions

We found that our non-research-intensive universities have all responded in similar ways to the changed higher education landscape of the last few years. Our research-intensive universities have also responded, but in noticeably different ways. Even allowing for the very small sample size with which we worked (and of course we would have wished to have been able to extend our study), it appears clear that what is usually referred to as 'the sector' is splitting into two distinct groupings in respect of the matters we have been studying here. More work is required to confirm this finding, and, if it is confirmed, to determine more precisely where the point of fracture lies.

It could be argued that this fracture is long-standing feature of English higher education, dating back at least to the creation of the polytechnics in the 1960s and 1970s, or perhaps to the establishment of the 'civic' universities in the late nineteenth and early twentieth centuries. Even if this is so, we are not aware of research findings that suggest that noticeably different approaches to what would now be called the student experience would be found among institutions with broadly similar academic profiles. Moreover, the fracture that we are pointing to appears to separate a very small group of institutions from the rest. Again, a division of this sort has not been a traditional feature of English higher education, even though some current policies (around research funding, for example) may be pointing in that direction.

In the non-research-intensive universities studied, a change in institutional cultures appears to have taken place in the last few years – primarily, but not exclusively, as a result of the new fee regime and the decisions taken by these institutions to charge the maximum fee allowable. It is important to note that the new fee regime was introduced at a time when 'recruiting' institutions were already engaged in intense competition. This was the result of demographic change; the growth in the number of institutions with university title, making it easier for them to compete with established universities (there were ten new university designations in 2010 alone (Temple, 2013: 166)); and targeted relaxations in student number controls, allowing 'selecting' universities to admit more high-achieving A-level students at the expense of less prestigious universities. All these factors have intensified since 2012, sharpening competition further. Other factors, such as the more restrictive visa regime for international students, have added to these pressures.

The high fees appear to have changed the way in which many students in our X and T cases relate to the university services on offer, with a definite trend towards more assertive consumer – if not always customer – attitudes; at least, this is how it appears to many of the staff and to student representatives. This in turn has driven universities to make wide-ranging changes in order to at least maintain each university's competitive position – which seems to have had the effect of reinforcing the view among students that they should indeed be treated as paying customers, with the rights that go with that status. We have only limited data here, but we may hypothesize a mutually reinforcing spiral of expectations.

There are, we suggest, positive and negative aspects here. Members of staff in the T and X cases believe that cultural changes have taken place in their universities, driven by the need to make student-facing activities more coherent and effective from the standpoint of students. This is arguably an overdue change, and the 2010–15 Coalition Government might reasonably have claimed that their policies had, to this extent, the effect of putting 'students at the heart of the system'. This new culture in our T and X cases places more demands on both professional and academic staff, and, for a variety of reasons, is not to the liking of some of those involved.

The positions at R1 and R2 show both similarities and differences compared with the T and X universities. There have been extensive internal restructurings to bring together previously disparate student-facing services, together with a greater emphasis on enhancing teaching and learning. There are, then, clear similarities with the T and X cases in these respects. However,

while in the T and X cases there was a widespread sense of culture change in the universities imposed from the top down in order to respond to new student demands, the sense at R1 and R2 was one of working within strong existing institutional cultures while seeking incremental improvements to practice – perhaps amounting to a cultural shift by stealth. The usual method of doing this at R1 was to identify an area of good practice and to hold this up as an example for emulation – occasionally supported by 'naming and shaming' when exhortation seemed to be insufficient. The strength of the existing collegial culture in R1 meant that this was, apparently, usually effective. The R1 and R2 universities did not see themselves as responding to sharp consumer-type pressures from students, but rather seeking to enhance what they already regarded as a good student experience by seeking improvements in a number of areas.

The trend towards administrative centralization seen in the T and X cases, believed to be necessary in order to provide improved and consistent levels of service to students, can create difficulties in large organizations such as our case-study universities. T1's removal of discretion at faculty level over contact hours in different modules is an example of a policy introduced to deal with student complaints but which may not be in the best interests of individual students. The distancing of administrative processes from day-to-day academic work may tend to create a 'them and us' culture, with unfortunate implications for effective and harmonious working relationships. R1 has approached the matter rather differently, with some reorganization of services but probably with more emphasis on ensuring that all functional areas planned to provide an improved student experience.

These changes are clearly associated with the idea of the 'student as customer' – now a relationship largely taken for granted by senior management and professional staff in our T and X cases, even if some academic staff in those universities resist its implications so far as teaching and learning are concerned. We noted earlier that while there are some areas of university activity where the student as customer, or client, is appropriate, it is difficult in a university to separate clearly academic and many non-academic activities; there seems to be a tendency for customer-related changes in non-academic areas to bleed across into academic areas.

Although the new fee regime has not led to competition on price between universities as the government had once hoped, senior staff in all our case-study universities were in no doubt that the overall higher education environment had become more competitive in recent years, though for different reasons in our T and X cases compared with the R cases. All the universities were accordingly making efforts to distinguish themselves, to stand out from the crowd. The emphasis that we found everywhere on NSS results, internal satisfaction surveys, league table positions, and marketing activity is a reflection of this. Intense involvement with social media, in various ways, is another symptom of this need for prominence in (particularly) the communication channels favoured by young people. Subsequent management actions place further pressure on professional and academic staff, as noted above. In particular, academic staff turnover in some of our case-study universities had increased significantly as a result. It seemed to us that there is a real danger of disaffection among academic staff in our T and X universities becoming endemic; there are now rival versions of how universities and their staff should stand in relation to students.

One of our research aims was to determine which managerial approaches appeared to be the most effective in leading to enhanced student experiences. A general difficulty in determining the effectiveness of structures and processes in higher education is that what appears to work well in one type of institution may not do so in another type; hence there are different approaches to governance, academic organization, internal resource allocation, and other matters, even in what appear at first sight to be rather similar institutions. What we believe we have shown in the present study is that a range of managerial approaches developed in our T and X cases'

responses to the changing landscape – notably greater centralization of administrative services, more central oversight of teaching and learning activities, and increased reliance on metrics in decision-making – are not being applied to the same extent, and in the same ways, in our R cases. All our cases would argue, we think, that that they are applying effective managerial approaches in response to new circumstances, but that 'effective', however it is measured, has different meanings in different types of institution.

We should like to conclude with this extract. We suggest that our findings provide some empirical validation for what is argued here:

> It is possible that, although a failure in terms of detailed policies, the reform of English higher education [following the 2011 White Paper] may achieve its overall objective: to change the culture of the system. The cumulative effect of these measures is likely to have an important impact on both institutional priorities and organizational cultures. Resources could well be diverted from 'front line' teaching and research into marketing and 'customer care'. In future academic leadership may be valued less highly than the 'business planning' skills needed to manage the new fees and funding environment … Collegially determined (and largely self-policing) norms, rooted in trust, could be replaced by performance measures and management targets … Two points deserve to be emphasized in this respect. The first is that the drift towards such behaviours is already well established ... The second point is that such corporate behaviours can flourish in the absence of true markets, just as collegial and mutualist behaviours can flourish in commercial environments. The reform of English higher education may not be successful in producing the market university, but it is certainly likely to provide a powerful stimulus to the development of the managerial university.
>
> (Callender and Scott, 2013: 217)

Note: the research reported in this paper was undertaken on behalf of the Higher Education Academy (HEA). The full study was published by the HEA in November 2014 titled *Managing the Student Experience in a Shifting Higher Education Landscape.*

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