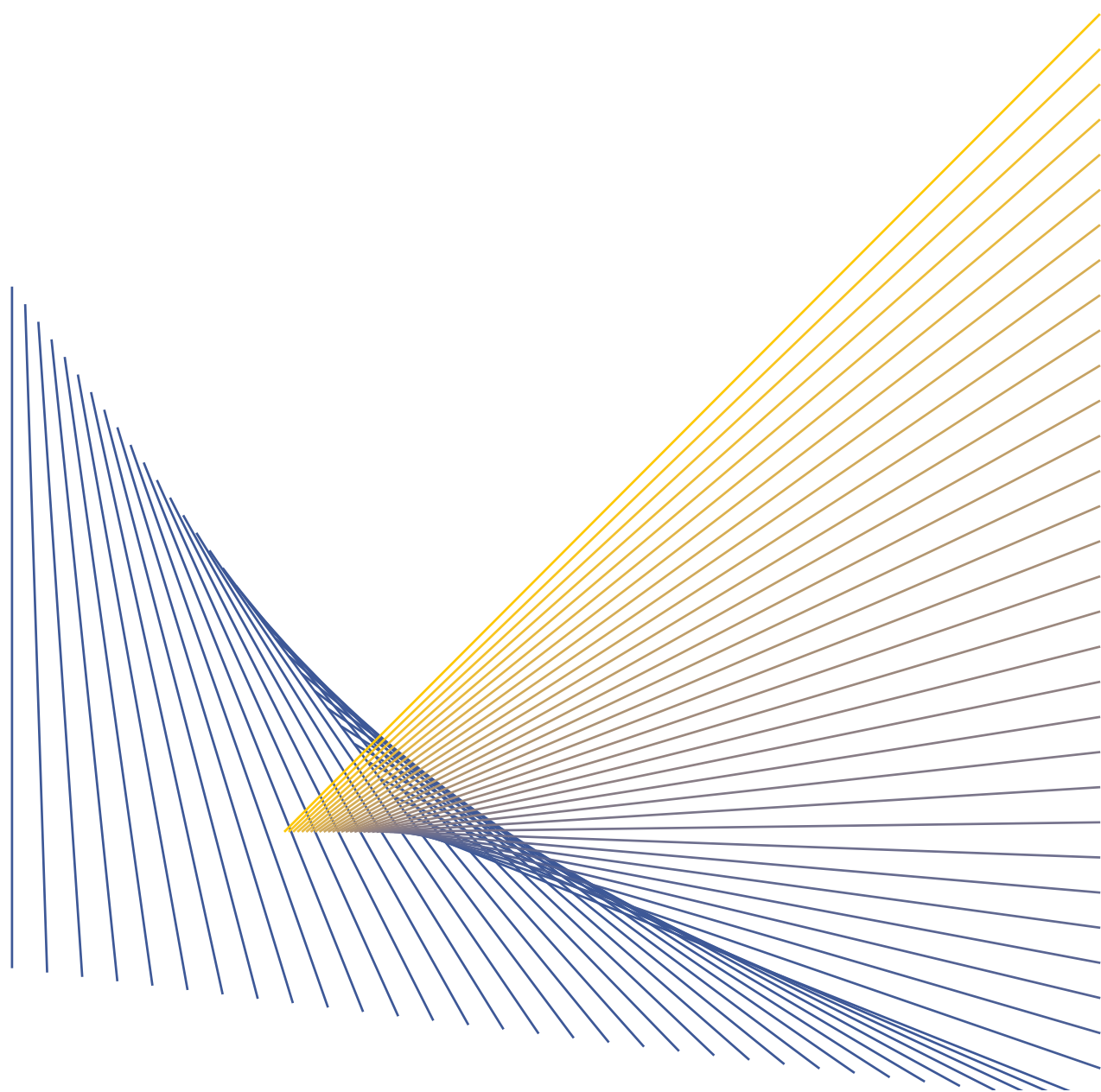


EDUCATION, CONSUMER RIGHTS AND MAINTAINING TRUST

WHAT STUDENTS WANT FROM THEIR UNIVERSITY



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EXECUTIVE SUMMARY

This report reviews student attitudes to, and perspectives on, their relationship with their university in the context of increased financial contribution, market competition and consumer rights. The findings discussed are based on an extensive survey of full- and part-time undergraduates, as well as two workshops carried out by ComRes with full-time undergraduate students, in early 2017. It identifies challenges for regulators and universities in working to protect and promote the interests of students in this new landscape. It argues that the success and satisfaction of students are founded on trust in the educational mission of their university, and that the Office for Students (OfS), and universities themselves, should protect and support this unique relationship. The report presents the following findings:

- **Students continue to value an educational relationship with their university that is based on high levels of trust:** the findings show that while there are differences in emphasis, with some expressing a more ‘transactional’ perspective, students recognise and value the unique educational relationship that they have with their university. In particular, students value a personalised and collaborative relationship that gives them confidence that their university cares about their educational interests.
- **Student perceptions of value for money are also based on what they expect to get out of their studies, particularly employment, as well as their personal experience of studying:** the research shows that student perceptions of value for money include the study process – good study facilities, high-quality academic staff and personalised feedback – as well as the outcome of their studies, which is generally viewed by students as securing a good job once they have graduated.
- **Students recognise that course changes may be necessary or beneficial, but want universities to communicate these changes up to a year in advance:** degree programmes are the service or product that students purchase and engage with when they go to university. Changes to courses can therefore have a significant impact on them. Students understand the potential benefits of changes, but place a high value on being fully informed in advance.
- **Students want to be confident that they are making a good, long-term choice of university:** we found that students’ main priority for the OfS is to be assured that all universities offer a good-quality education. They would be

Students value a personalised and collaborative relationship that gives them confidence that their university cares about their educational interests.

particularly concerned in the case of institutional closure, highlighting the importance of continuity of education. Undergraduate students are most likely to say that their preferred outcome following institutional closure would be for their university to be taken over by another, with their course able to continue.

The OfS should seek to protect the unique relationship between students and their university. This will necessitate the OfS developing a mature approach that recognises the diversity of both universities and students and avoids proscriptive interventions and incentives. The primary role of the OfS in this relationship will be to provide assurances to students about the quality of an institution and that there are protections in place should something go wrong. Equally, in the context of growing market competition, in order to maintain the trust and confidence that students have in the value of their education, it is essential that universities deliver on their promises.

The Office for Students should seek to protect the unique relationship between students and their university.

91% of students who said that their course is good value for money also said they value their relationship with their university.

Source: ComRes (2017)

INTRODUCTION

A key feature of the success of the UK higher education sector is a relationship where universities support and challenge students to achieve their educational goals through high-quality programmes of academic study. This report aims to assess how student perspectives of this crucial relationship are evolving in the context of a growing emphasis on market competition and consumer rights. In particular, since the shift towards fees-based funding in 2012, there has been a lot of scrutiny of the value for money that students receive from their relationship with their university.

The report explores students' perceptions of themselves as consumers of higher education, following an increased focus on this aspect of the student–university relationship. The Competition and Markets Authority (CMA) has clarified that all UK universities are subject to consumer rights regulations and has subsequently sought undertakings from universities as part of enforcement activity. This has emphasised the need for universities to ensure that they are compliant with the law, including providing accurate information for prospective students and having fair contractual terms and conditions.

This report explores the implications of these attitudes for universities and policymakers in the context of the establishment of an Office for Students (OfS) as the regulator for the English higher education sector from 2018. The OfS will have a statutory duty to promote competition in the student interest. This will include encouraging new entrants into the market, introducing 'temporary' degree awarding powers, and requirements for 'student protection plans' that may come into effect when a course or an institution 'exits the market'.

As the OfS is established and develops, it will be necessary to review how it approaches its statutory duties and employs the levers at its disposal. Central to this will be how the OfS approaches its relationship with the universities, as the bodies it is regulating, and the interests of students, as key beneficiaries of its work. The Higher Education and Research Act 2017 incorporates principles of co-regulation, including protection of the autonomy of universities alongside the need for the OfS to work with the sector to deliver its own objectives and functions.

How this set of relationships develops will be central to the ability of the OfS to regulate in the interests of students. Insight from the sector will be essential to shaping this; the OfS must recognise that universities and students are diverse, with a variety of relationships constantly being cultivated. The OfS will need to understand what assurances students need about the quality of an institution and the protections that are necessary should something go wrong. Equally, it is essential that universities maintain the confidence of their students by delivering on their promises.

The Higher Education and Research Act 2017 incorporates principles of co-regulation, including protection of the autonomy of universities alongside the need for the OfS to work with the sector to deliver its own objectives and functions.

Although the OfS will regulate English institutions only, the findings and recommendations of this report are also relevant to the wider UK sector. Consumer rights legislation and the guidance previously issued by the CMA applies to universities across the UK. Similarly, the funding councils of the constituent nations of the UK should also have an interest in protecting and supporting the unique relationship between students and their university.

This report presents findings from qualitative and quantitative research, conducted by ComRes on behalf of Universities UK (UUK). The aims of the research were to:

- understand how students currently perceive their relationship with their university and how this compares with other customer relationships
- establish what students want their relationship with their university to look like
- explore student perceptions of value for money
- understand how students feel about changes to their course, as the product or service they are purchasing
- explore students' priorities for the Office for Students

ComRes interviewed 1,019 full- and part-time university undergraduate students in the UK online between 12 and 19 January 2017.¹ Data was weighted to be representative of all UK undergraduates by year of study, gender and university type. The survey questions are detailed at Annexe A.

ComRes also conducted two workshops with full-time undergraduate students currently studying at university. The workshops were held with 14 undergraduates studying at universities in the south of England on 15 February 2017 and with 15 undergraduates in the north of England on 16 February 2017. There was a mix of first-, second- and third-year undergraduates studying a variety of subjects from a range of institutions.

The research was not carried out with postgraduate students, who are nonetheless equally protected by consumer law and fall within the remit of the OfS, and represent an important part of the university community.

¹The full data tables for this research can be viewed at <http://www.comresglobal.com/polls/universities-uk-undergraduates-survey/>

1. STUDENT PERSPECTIVES ON THEIR RELATIONSHIP WITH THEIR UNIVERSITY

We found that the student–university relationship continues to be characterised by high levels of trust in comparison with other types of customer relationship. Being a ‘customer’ is viewed by most students as part of the relationship with a university, rather than a defining feature of it. Ultimately, the student–university relationship is regarded by students as unique, with particular value placed on a personalised and collaborative relationship rather than a superficial consumer transaction.

1.1 Do students see themselves as customers?

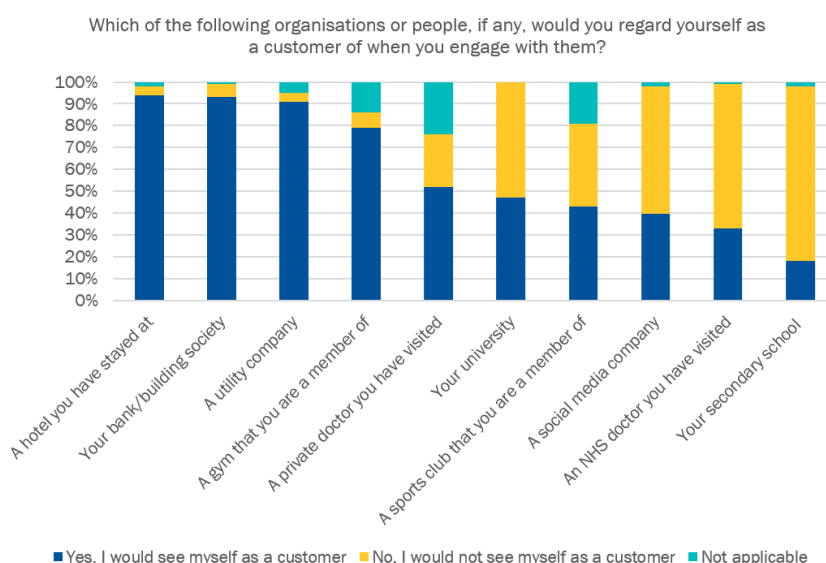
We asked students whether they regard themselves as customers of a range of organisations, institutions or people (Figure 1). Around half of undergraduates say they regard themselves as a customer of their university (47%) while the other half say they would not (53%). This compares with 94% saying they regard themselves as a customer of a hotel or their bank, and 91% who say they regard themselves as customers of their utility companies.

Around half of undergraduates say they regard themselves as a customer of their university (47%) while the other half say they would not (53%).

By contrast, only 18% said they would regard themselves as a customer of their secondary school, with 80% saying they would not regard themselves as customers. The results suggest a difference between services where there is a clear transactional relationship (such as a hotel, bank or utility company) and those where this is less direct (university or private doctor). Therefore, while being a consumer is clearly an important part of being a student, it does not appear to be the overriding feature.

FIGURE 1:

Perceptions of customer relationships



Perceptions of being a customer also varied between gender and university. Of the students who participated in the survey, male undergraduates are more likely than females to say that they regard themselves as customers of their university (51% and 43% respectively). Furthermore, students at a post-1992 university are more likely than those who attend a highly selective institution to say they see themselves as customers (51% and 40% respectively).

There is also less awareness among students of their consumer rights when engaging with their university compared with other organisations. Only 62% thought they were protected by consumer law when engaging with their university, in comparison with 93% who believed they were protected in their relationship with their bank or building society. Notably, in one workshop, participants did not believe they had the same bargaining power with their university as with a bank or mobile phone company. The members of the group did not feel they could ‘negotiate’ with their university, nor ‘switch’ their custom away; nor was this a favoured option even if it were possible. This suggests that students feel that some of the primary features associated with being a customer are not available to them when it comes to their relationship with their university.

Being a ‘student’ therefore appears to be a separate categorisation when compared with relationships with other types of institution or service providers. In the workshops, participants did not offer other ways of describing the relationship unprompted. When prompted, there was discussion around being a consumer, and the word ‘ambassador’ was also used to explain the relationship they felt they had with their university. However, even where students did feel that they were customers of their university, this was often qualified, such as in the quote below:

I’m more of a customer to my bank than to my university. I don’t know the person on the other side at my bank, it’s less personal.

Female, north workshop

This suggests a view of standard customer relationships as transactional and impersonal, and that students expect more than this from their university. A strong theme throughout the research was that students want a more personal relationship with their university than the type of engagement they appear to associate with being a ‘customer’. This points to a common student perception of a unique student–university relationship of which being a consumer, among other characteristics, is one part.

Students at a post-1992 university are more likely than those who attend a highly selective institution to say they see themselves as customers (51% and 40% respectively).

A strong theme throughout the research was that students want a more personal relationship with their university than the type of engagement they appear to associate with being a ‘customer’.

1.2 A personal relationship with their university is a top priority

Students place a high priority on a personalised relationship with their university that supports them to achieve their educational goals, but recognise that this is a collaborative process that also places responsibility on the student. A high proportion of students (80%) said that personalised advice and support are among the top three things they want from their relationship with their university. Students expect their university to take an active interest in them as an individual and to help them progress through their education, as well as providing careers guidance and support.

A high proportion of students (80%) said that personalised advice and support are among the top three things they want from their relationship with their university.

Ranked second was ‘a service in return for the fees you pay’, and 73% ranked this in their top three priorities (Table 1). While this does suggest a more transactional view of the student–university relationship, the findings clearly show that students expect the ‘service’ to be personal and for the university to care about their best interests. The third most highly ranked statement was ‘a collaborative relationship with university staff’, again highlighting that students see it as a two-way relationship.

TABLE 1:

Perceptions of customer relationships

FEATURES OF THE STUDENT–UNIVERSITY RELATIONSHIP	% RANKED FIRST	% IN TOP THREE
A service in return for the fees you pay	38%	73%
Personalised advice and support	34%	80%
A collaborative relationship with university staff	16%	69%
An opportunity to contribute to the university and its aims	3%	29%
A say in the governance of the university	2%	16%
Minimal contact beyond that necessary for the course	2%	12%
None of the above	5%	

Note: In response to the survey question, ‘Which of the following, if any, do you want from your relationship with your university? Please rank your top 3.’

The priority placed on a personal relationship with universities was also reflected in the qualitative research. A more personal relationship was often described in terms of a good relationship with a personal tutor who could offer both academic and non-academic advice and individualised feedback on assignments. This does not necessarily equate to a desire for more contact time; undergraduates in the workshops were split over whether they wanted higher levels of engagement with their university. Many believed that the relationship should be different to the one they had had with their school, with greater independent learning and responsibility.

Top 3 things students value from their university

- **A service in return for tuition fees**
- **Personalised advice and support**
- **A collaborative relationship with university staff**

Source: ComRes (2017)



1.3 Students continue to have high levels of trust in their university

Notably, students placed a high level of trust in their university. Four-fifths of students (79%) value the relationship they have with their university and 87% say their university treats its students fairly, indicating high levels of trust across the higher education sector. Three in five (62%) of undergraduates say that their university cares about their best interests, second only to the proportion saying that an NHS doctor cares about their best interests (73%).

Very similar proportions say that their secondary school and university care about their best interests (61% and 62% respectively), compared with only 20% for their bank or building society (Figure 2). This suggests that the relationship is still viewed as educational rather than transactional. Traditionally, an educational relationship has been founded on the university's authority to define and determine the content delivery and assessment of degrees. This is often seen as distinct from provision that is defined by students, although clearly, input from students and representatives is an important feature of delivering good programmes and supporting students.

Furthermore, those who say that their degree offers good value for money are more likely to say their university cares about their best interests. This suggests a link between the features that drive student perceptions of value for money – such as the availability of good facilities (Figure 3) and a positive impact on their future career – and the features that make students feel that their university cares about them. There is a similar correlation between those who agreed with a number of the positive statements about their university and perceptions of good value for money:

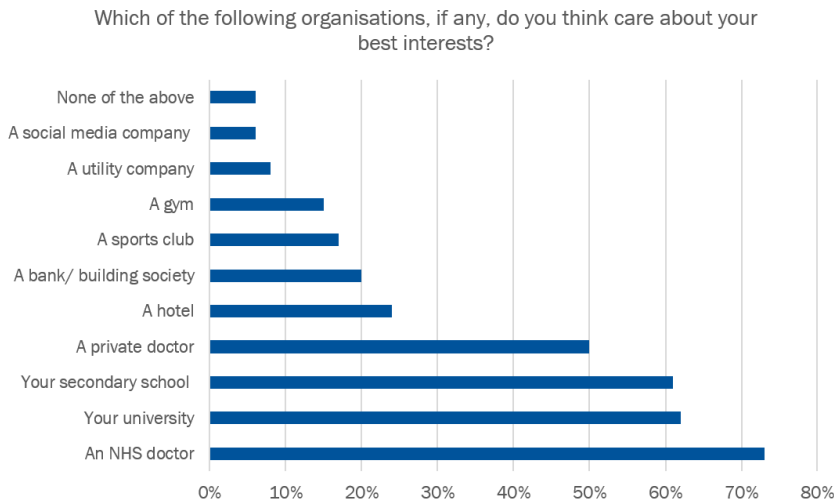
Students who say that their degree offers good value for money are more likely to say their university cares about their best interests.

- 91% of those who said that their course is good value for money also said they value their relationship with their university
- 93% of those who said that their course is good value for money said that their university treats its students fairly

This suggests that perceptions of value for money are influenced significantly by levels of trust and satisfaction in the university.

FIGURE 2:

Perceptions of organisations caring about students' best interests



There does, however, appear to be a change in this sentiment as students progress through their studies. Undergraduate students in their first year of study are more likely than students who have been studying for longer to say that their university cares about their best interests: 72% of first years said their university cares, compared with 60% of second years and 55% in their third year or above. This suggests that there is a challenge for universities to retain the trust and confidence of their students over time.

2. STUDENT VIEWS OF VALUE FOR MONEY

Value for money has been, and remains, a high-profile subject for the higher education sector. With increased tuition fees, it has naturally become a more significant part of the student experience. We asked students whether they think the course they are studying offers good value for money and why, in order to better understand what features are prioritised in perceptions of value for money.

The research shows that student perceptions of value for money take account of both the process of getting a degree, and the outcomes they expect from obtaining this qualification. This includes students feeling that they have access to the resources they need to get a good degree – good facilities, high-quality academic staff and high-quality course content – with the outcome that their degree will help them to secure a job once they have graduated.

We also found that for students taking part in the workshops, satisfaction with their studies is linked to perceptions of their personal relationship with their university, such as individual feedback on work. This highlights students' priorities for their course and general university experience, with a clear emphasis throughout on personal engagement, quality and feedback.

Student perceptions of value for money take account of both the process of getting a degree, and the outcomes they expect from obtaining this qualification.

2.1 What is good value for money?

In the qualitative research, good value for money was defined as including:

- high-quality teaching
- good facilities, including specialist facilities for the course
- a variety of extra-curricular opportunities beyond the course

Many students in the workshops offered the view that there is more to evaluating the value for money of their degree than just the academic content. They cited the university experience (such as social life, independence and the extra-curricular activities on offer) as an important aspect of their judgement of value for money. The quote below captures this, as well as illustrating the view that students do not see their university experience as one-sided, and understand that the outcomes are linked to their own contribution as much as their institution's:

I find the £9,000 [tuition fee] goes beyond just the course. You get what you put in, you join whatever societies you want. I was a lot a more immature when I came to university, it's definitely worth the money I've had to spend. It does balance out in that respect I think.

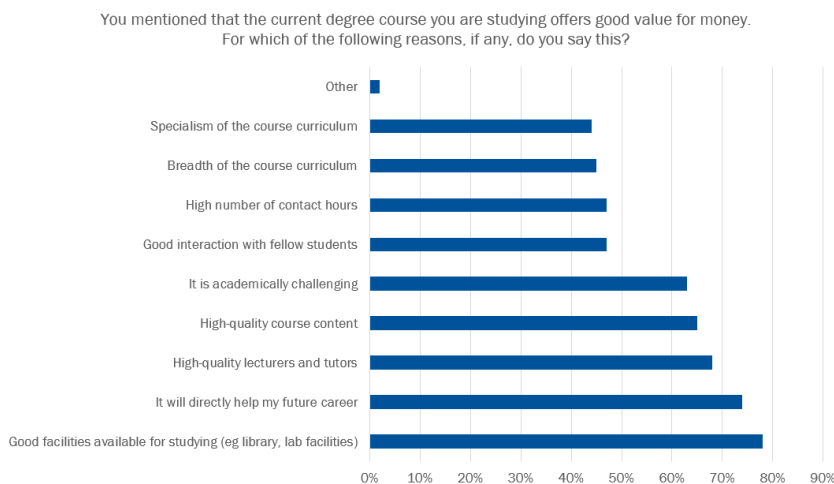
Male, north workshop

This aligns with the quantitative findings (see full results at Figure 3); of those who said that their degree is good value for money, the top five reasons were:

- good facilities available for studying
- will directly help future career
- high-quality lecturers and tutors
- high-quality course content
- academically challenging course

It was also suggested in the qualitative workshops that there is a shift in priorities over time, with students increasingly focused on achieving a good degree over the other aspects of their university experience.

FIGURE 3:
Perceptions of good value for money



The top reasons chosen represent tangible aspects – facilities, access to high-quality academic staff, getting a job – and give an insight into what students use to evaluate value for money as it relates to their degree. This was reflected in the qualitative stage of the research, where some students felt that lecturers provided a minimum level of learning rather than engaging more deeply with them as a student, which is what students expect. One participant described value for money as follows:

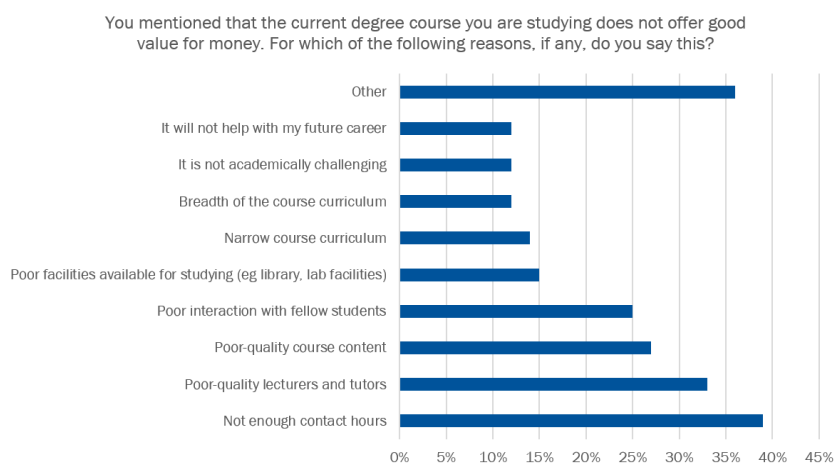
When I turn up for a lecture I want to be learning something new, that the lecturer has taken time to prepare, that I’m learning something I couldn’t look up on the internet. I want to feel like if I wasn’t there, I would be missing out.

Female, north workshop

The focus groups also highlighted that students see themselves as co-producers of their university experience and expect such an approach; they do not want to replicate school learning; nor do they expect the same level of involvement in their work as their teachers may have had. In fact, a highly valued feature of the student experience was independence, both academically and more generally. It is worth noting that there was also an understanding that different types of courses require different levels of contact time and facilities.

FIGURE 4:

Perceptions of poor value for money



We also wanted to understand what might be driving student concerns around value for money. Notably, those students who see themselves as customers are more likely to say their current degree course is not good value for money – 48% of those who would regard themselves as customers of their university say their course is not good value for money, compared to 33% who would not regard themselves as customers. This could suggest that perceptions of what amounts to good value for money in this instance may be slightly different to those of the undergraduates who do not regard themselves as customers of their university.

Figure 4 shows that the top reason for students feeling that their degree course does not offer good value for money is not having enough contact hours. Yet, having a high number of contact hours was only listed as a reason by 47% of students who said that their course is good value for money. This suggests that where students are dissatisfied with the amount of contact time on their course, it has a significant impact on their perception of the value for money offered by their degree course and appears to be a driving factor of perceptions of poor value for money. Conversely, it is not a primary driver of student perceptions of good value for money.

The qualitative stage of the research also reflected the findings of the survey, with many students citing lectures and lecturers not meeting their expectations as a reason for feeling their course did not offer

good value for money. This was often linked to a feeling that lecturers were not engaged with students or providing personal feedback as much as they would have liked. This may to some extent explain the high response in the ‘other’ category – feeling like engagement could be better may mean students do not feel they have the personal, collaborative relationship that many prioritise from their university (see Table 1).

Clear and accurate information for prospective students plays an important role here to help students understand what to expect and to get the most from their studies. Universities are already required to ensure that the key information needed to decide where and what to study is readily available, and must adhere to consumer rights regulations in doing so. This information sets prospective students’ expectations for different courses and how these will be delivered by a particular university.

Universities are also aware of the central importance of a good-quality teaching and learning experience that challenges students academically, but with the right support and learning opportunities to help them achieve their goals. The shift to fees-based funding, ending of student number controls and introduction of the Teaching Excellence Framework (TEF) are also driving an emphasis on teaching quality from the perspective of students. The challenge for the sector will be to ensure that market competition and TEF help to enhance teaching practice and learning outcomes in the long term. This will need to consider student perspectives, student outcomes over the longer term, and the impact of teaching and the sector’s professional expertise on higher level pedagogies and analytical skills.

The challenge for the sector will be to ensure that market competition and TEF help to enhance teaching practice and learning outcomes in the long term.

Top 5 reasons that make courses good value for money

- **Good facilities available for studying**
- **Future career prospects**
- **High-quality lecturers and tutors**
- **High-quality course content**
- **Academically challenging**

Source: ComRes (2017)



3. COURSE CHANGES AND CLOSURES

Degree programmes are the core service or product that students purchase when they go to university. Changes to courses can therefore represent a significant change, and for which students themselves recognise they have little scope to ‘negotiate’ with their university. CMA guidance has also highlighted that universities, as service providers, enter into a contractual relationship with their students. Material information provided to students as part of making their choice, including information about course programmes, forms a part of this contract.

This has raised some questions about the extent to which course changes can be made, and when it is appropriate to implement changes. Making changes to courses is not unlawful, if they are managed and implemented in the correct way, which includes ensuring changes are transparent, timely and communicated effectively to students. This has highlighted the need for institutions to ensure that their terms and policies governing changes are fair and clear about the circumstances when changes may be made, and must not allow for a ‘blanket’ discretion to vary.

To help understand student perceptions of course changes and closures, the survey asked students about their experiences and expectations. The findings from this research suggest that most students recognise that courses may need to change and that there may be benefits when they do. However, students also reported placing a high value on being informed well in advance of changes, with the highest proportion expecting to be informed between six months and a year ahead of implementation. This highlights the need for effective communication about course changes and again indicates the importance to students of continuity of provision. Last-minute changes are likely to impact negatively on student perceptions of their relationship with their university.

The findings from this research suggest that most students recognise that courses may need to change and that there may be benefits when they do.

3.1 Experiences of course changes

Figure 5 sets out the different types of change to courses that students have experienced. This shows that changes to lecturers providing the course are most common, with 41% of students saying they have experienced this either while studying or before starting the course.

Except for changes to tuition fees, students were more likely to say that the change had no impact on their satisfaction with the course than that it increased or decreased their satisfaction (Figure 6). However, there are still some significant impacts. For example, almost a third (32%) said that changes to the modules available increased their satisfaction with the course, though a quarter reported that their satisfaction decreased because of this, and 43% said it had no impact. The most significant decrease in satisfaction with the course came

from changes to tuition fees, where 55% said their satisfaction was adversely affected.

FIGURE 5:

Changes to provision

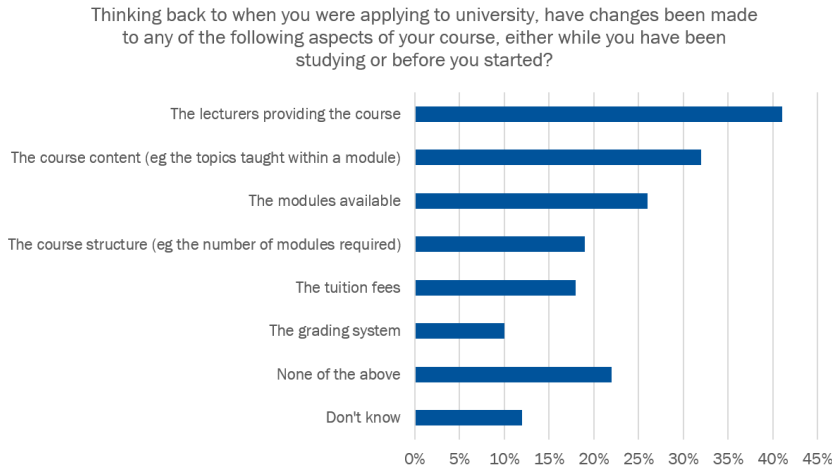
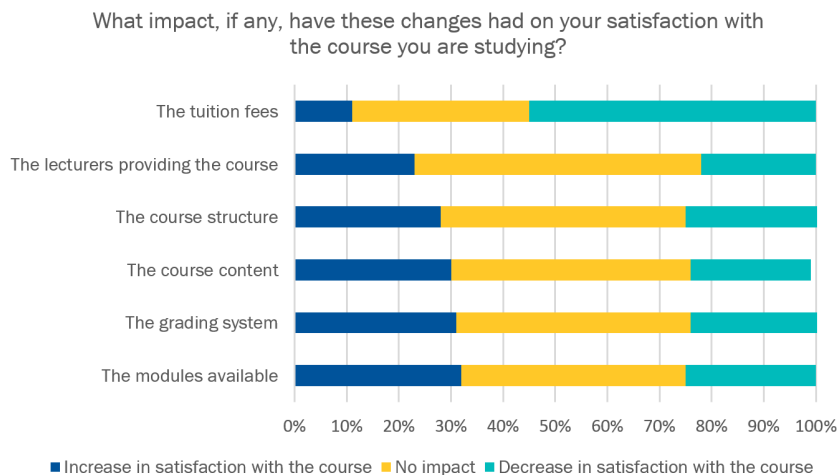


FIGURE 6:

Impact of changes on student satisfaction



It is interesting to note that although the most common change is a change in the lecturers providing the course, this appears to have the least impact on satisfaction, with 55% reporting no impact. In terms of the handling and notification of changes, students say they would expect to be notified of any changes either one to six months (33%) or six months to one year (35%) in advance. Only 15% of undergraduate students do not think a university should be able to make changes to a course once students are studying it. This suggests that what is most important is that changes are made in plenty of time, with a reasonable amount of advance notification for students.

The results show that students do not see course changes as inherently negative or disadvantageous to their university experience. However, students welcome having an effective process in place to

manage these changes. 84% of those who say their course is good value for money said that their university keeps them well-informed about changes. This highlights the necessity of clear, accurate and timely communication around course changes.

There is a small difference between those who do and do not think their course is good value for money, with those who think their course is good value for money being more likely to say they have not experienced any of the changes listed in figure 5 (25%), compared with 19% for those who do not think they are getting good value for money. However, when this was explored in more detail in the workshops, there was broad agreement that changes being made to reflect lecturers' specialisms or changes in the subject field would be positive changes.

Only

15%

of undergraduate students do not think a university should be able to make changes to a course once students are studying it.

Source: ComRes (2017)

4. THE ROLE OF THE OFFICE FOR STUDENTS

The research explored what students might want from the OfS when it is set up in 2018. We found that students want to be assured that they are making a good-quality choice of university when embarking on their course. They would be particularly concerned in the case of institutional closure, highlighting the importance of continuity of education for students. When asked what their preferred outcome would be following institutional closure, undergraduate students are most likely to say that they would want their university to be taken over by another, with their course able to continue.

4.1 Students' priorities

Undergraduates are most likely to say that the OfS should prioritise ensuring that all universities offer a good-quality education (29%) out of the options tested (Table 2). Lower down the list of students' priorities is ensuring students are well informed to make choices about their course; only 8% rank this as first, but 34% rank it within their top three priorities for the OfS. This suggests that while it may not be a prime concern for the majority of students, a third still believe that there is a role for the new regulator in ensuring accurate information provision.

TABLE 2:

Students' choice of top three priorities for the OfS

FUNCTIONS	TOP FUNCTION	% IN TOP THREE
Ensuring all universities offer a good-quality education	29%	65%
Ensuring all universities offer value for money	18%	51%
Ensuring students are protected if a university closes, either by transferral onto similar courses elsewhere or a refund in fees	17%	50%
Ensuring all universities protect students' academic interests	14%	45%
Making sure students are well informed to make choices about their course	8%	34%
Encourage competition between universities in the interests of students	3%	10%
Promoting more choice when students are applying about what and where to study	3%	15%
Protecting the reputation of a university education	2%	11%
None of the above		6%

Note: In response to the survey question, 'Which of the following functions, if any, do you think the OfS should prioritise? Please rank your top 3.'

When discussing whether the OfS has a role in protecting the reputation of the sector, conversations were split between seeing reputation as a sector-wide asset to be protected, or a feature of each individual university for which universities themselves are responsible since they operate within a ‘buyers’ market’.

Students were broadly happy about the establishment of new universities if they were properly ‘accredited’. However, the closure of a university was highlighted as a major concern for students, with 98% saying they would be concerned if their university had to close down while they were still studying (91% very concerned). Similarly, 95% of students said they would be concerned if their university had to close down whilst they were studying, and they were offered a place on a similar course at another university.

Protecting students in the event of university closure was ranked as one of the top three priorities for the OfS by 50% of students responding to the survey (Table 2). In terms of actions following the closure of a university, undergraduate students are most likely to say they would want their university to be taken over by another, with their course continuing. The other preferences were for a full tuition fee refund for the course to date, or the ability to transfer academic credits achieved to another university. This stresses the importance of continuity for students.

The closure of a university was highlighted as a major concern for students, with 98% saying they would be concerned if their university had to close down while they were still studying (91% very concerned).

Students’ top 3 priorities for the OfS

- **Ensure all universities offer a good quality education**
- **Ensure all universities offer value for money**
- **Ensure students are protected if a university closes**

Source: ComRes (2017)



NEXT STEPS FOR THE SECTOR

This research shows that students view their relationship with their university as unique, and emphasise personal engagement and their personal and educational development both during and beyond the course as priorities. When compared with other customer relationships, students expect a different type of relationship with their university; it is distinct from the more traditional, transactional relationship they might have when paying for other types of goods or services. A high value is placed on being assured that they have made a good long-term choice with a university that cares about their best interests, will support them through their studies, provides the facilities they need and offers guidance to students as they begin to make choices about their future careers.

The recent changes in the higher education regulatory and policy landscape raise questions about how best to serve the student interest in a more competitive market. Students welcome the choice associated with competition and increasingly see themselves as customers of their university. Yet they also recognise that this relationship is unique and is characterised by a collaborative approach; while students have clear expectations of their university, they also expect to shape their own experience. The challenge for universities is to balance these different demands in a way that encourages and supports students to achieve their goals.

Central to this relationship is the trust and confidence that students have in their university's role and its ability to ensure that students get the most from their studies. The expertise of a university in defining programmes of study, their outcomes and the wider study experience are essential features of an effective educational relationship. The importance of this expertise is illustrated by the priority that students place on a university that has their interests at heart and wanting to obtain a 'good degree'. Equally, engagement with students and their representatives can also be an important part of building this confidence and is highlighted by the importance that students place on a personal relationship with their university.

Universities recognise the unique nature of this relationship, including the way in which consumer law is applied. For example, institutions regularly go beyond what is required by consumer legislation in allowing applicants to change their mind well beyond the cancellation window provided for by consumer protection regulations.² This rightly reflects the sector's priority of putting students' educational interests at the centre of the way universities operate and gives students further opportunity to make the right choice.

A high value is placed on being assured that they have made a good long-term choice with a university that cares about their best interests, will support them through their studies, provides the facilities they need and offers guidance to students as they begin to make choices about their future careers.

² The Consumer Contracts Regulations (2014) provide for a 14-day cooling-off period if making a distance purchase. The CMA views the acceptance of an offer via UCAS as a distance selling contract.

Furthermore, the increased use of clearing by students to change their course after qualification and the OfS's role in facilitating switching can also help to ensure that students find the right university for their studies.

It is also important that the educational relationship between universities and students is protected in ways that go beyond maintaining trust through basic consumer protections and choice. This includes ensuring that universities have the autonomy to develop diverse educational relationships that support and challenge their students, rather than following proscriptive or directive interventions and incentives. Similarly, universities benefit from the right balance between competition, collaboration and a stable operating environment to deliver the consistent, high-quality experience that they promise their students.

As we move into the new regulatory landscape in England as well as across the UK, these findings suggest that the following steps could be taken across the sector to ensure that student interest, and the student–university relationship, are accurately reflected within the new regulatory environment.

Universities benefit from the right balance between competition, collaboration and a stable operating environment to deliver the consistent, high-quality experience that they promise their students.

The Office for Students

The OfS should protect and support the unique educational relationship between a student and their university.

The OfS should recognise, and make central to its regulatory approach, the protection of, and support for the unique relationship between universities and students. This includes allowing universities to foster a collaborative relationship with their students that supports and challenges them to achieve their educational goals. The OfS should consider how competition and consumer regulation can be used in ways that ensure that these relationships are fair as well as capable of protecting the unique features that characterise them.

The OfS should recognise the active benefits of institutional autonomy beyond its statutory duties to protect it. Students have a relationship with their own university, and it is this relationship and interaction that shape perceptions around value for money and whether students feel that their university cares about their best interests. Institutions need to be able to foster and manage this relationship and trust at a local level. The OfS should provide the backstop protection for students against transient or poor-quality providers or if something goes wrong. Institutional autonomy allows universities to respond to the needs of their student body and to cultivate the collaborative relationship of co-production.

The OfS should ensure that students are protected from transient or poor-quality providers.

The OfS should ensure that students are protected from the risk of transient or poor-quality providers by setting an appropriately robust

bar for entry into the sector to give students confidence about their long-term study choices. Student protection plans should place a priority on academic continuity over financial reimbursement and protection plans should not be a tool that increases the regulatory appetite for tolerating transient providers.

The higher education sector

The higher education sector should consider whether and how student views of quality and value for money, including student outcomes, should be reflected in the quality code.

Consideration may also need to be given to the way the sector defines and reviews quality and standards in the new landscape. These questions should be considered as part of a UK-wide review of the quality code to ensure that it responds to the needs of the UK higher education sector, funders and regulators and students themselves in an increasingly competitive landscape. A review should aim to re-articulate the sector's expertise on the pedagogical requirements, including course design and structure, and the assessment and challenge that are required for higher level learning.

Universities

Universities should deliver on the promises made to students.

Effective communication with students is paramount to a productive relationship between students and their universities. It is incumbent on universities to deliver on the promises they make to students, and that have informed their choice. This will help to maintain the trust and confidence of students whilst providing consistency and continuity during their studies. This includes promises made at the application stage, as well as clarity of policies and regulations that apply to students.

Universities should ensure they have an effective process for making changes to courses.

This includes ensuring that terms and conditions agreed with students are clear and fair to ensure that course changes are legitimate. Universities should also consider the processes and timeline for making changes to courses to ensure that they are made in good time and communicated appropriately to retain the trust and confidence of students.

ANNEXE A: ONLINE QUESTIONNAIRE, PREPARED BY COMRES FOR UNIVERSITIES UK

Standard demographics to include: age, gender, region, course, university, year of study, socio-economic group, nationality.

D1. Which of the following best describes the type of secondary school you attended?

- a. Fee-paying private school
- b. State-funded grammar school
- c. State-funded comprehensive school
- d. Academy
- e. Other
- f. Don't know

1. [ASK ALL] Which of the following organisations or people, if any, would you regard yourself as a customer of when you engage with them?

Yes, I would see myself as a customer/No, I would not see myself as a customer/Not applicable

- a. Your bank/building society
- b. An NHS doctor you have visited
- c. A private doctor you have visited
- d. Your secondary school (while you were a student there)
- e. A hotel you have stayed at
- f. Your university
- g. A sports club that you are a member of
- h. A gym that you are a member of
- i. A utility company (eg gas/electricity/broadband/mobile phone provider)
- j. A social media company (eg Facebook/Google/Twitter)

2. [ASK ALL] Consumer law is designed to protect your consumer rights when you buy goods or services. When engaging with each of the following people or organisations, do you think you are protected, or are not protected, by consumer law?

Protected /Not protected

- a. A bank/building society
- b. An NHS doctor
- c. A private doctor
- d. Your secondary school (while you were a student there)

- e. A hotel
- f. Your university
- g. A sports club
- h. A gym
- i. A utility company (eg gas/electricity/broadband/mobile phone)
- j. A social media company (eg Facebook/Google/Twitter)

3. **[ASK ALL]** Which of the following organisations, if any, do you think care about your best interests?

- a. A bank/building society
- b. An NHS doctor
- c. A private doctor
- d. Your secondary school (while you were a student there)
- e. A hotel
- f. Your university
- g. A sports club
- h. A gym
- i. A utility company (eg gas/electricity/broadband/mobile phone)
- j. A social media company (eg Facebook/Google/Twitter)
- k. None of the above

4. **[ASK ALL]** For each of the following pairs of statements, please select the one that comes closest to your opinion.

- A. *My current degree course is good value for money* / *My current degree course is not good value for money*
- B. *I value the relationship I have with my university* / *I do not value the relationship I have with my university*
- C. *My university treats its students fairly* / *My university does not treat its students fairly*
- D. *My university has my educational interests at heart* / *My university does not have my educational interests at heart*
- E. *My university keeps its students well-informed about changes to courses* / *My university does not keep its students well-informed about changes to courses*

5. **[ASK ALL WHO SAY THAT COURSE IS GOOD VALUE FOR MONEY]** You mentioned that the current degree course you are studying offers good value for money. For which of the following reasons, if any, do you say this? Please select all that apply.

- a. High-quality lecturers and tutors
- b. High number of contact hours
- c. It will directly help my future career
- d. Good interaction with fellow students
- e. High-quality course content

- f. Breadth of the course curriculum
- g. Specialism of the course curriculum
- h. Good facilities available for studying (eg library, lab facilities)
- i. It is academically challenging
- j. Other [please specify]
- k. None of the above

6. [ASK ALL WHO SAY THAT COURSE IS NOT GOOD VALUE FOR MONEY] You mentioned that the current degree course you are studying does not offer good value for money. For which of the following reasons, if any, do you say this? Please select all that apply.

- a. Poor-quality lecturers and tutors
- b. Not enough contact hours
- c. It will not help with my future career
- d. Poor interaction with fellow students
- e. Poor-quality course content
- f. Narrow course curriculum
- g. Breadth of the course curriculum
- h. Poor facilities available for studying (eg library, lab facilities)
- i. It is not academically challenging
- j. Other [please specify]
- k. None of the above

7. [ASK ALL] Which of the following, if any, do you want from your relationship with your university? *Please select your top 3.*

- a. Personalised advice and support
- b. A service in return for the fees you pay
- c. A say in the governance of the university
- d. An opportunity to contribute to the university and its aims
- e. Minimal contact beyond that necessary for the course
- f. A collaborative relationship with university staff
- g. None of the above

8. [ASK ALL] Thinking back to when you were applying to university, have changes been made to any of the following aspects of your course, either whilst you have been studying or before you started?

- a. The course content (eg the topics taught within a module)
- b. The course structure (eg the number of modules required)
- c. The modules available
- d. The lecturers providing the course
- e. The grading system
- f. The tuition fees
- g. None of the above
- h. Don't know

9. [ASK ALL WHO SELECT AT LEAST ONE OF a–f AT Q9] What impact, if any, have these changes had on your

satisfaction with the course you are studying?

*Increase in satisfaction with the course/No impact/
Decrease in satisfaction with the course*

10. [ASK ALL] If your university were to make changes to the course you are studying (for example, changing the modules available or the content taught), how far in advance, if at all, do you think that they should notify you about these changes?

- a. I would not expect to be notified of any changes
- b. 1–6 months
- c. 6 months – 1 year
- d. 1–2 years
- e. 2+ years
- f. I do not think a university should be able to make changes to a course once students are studying it
- g. Don't know

11. In which of the following circumstances, if any, would you be happy with changes being made to the university course you are currently studying?

- a. The content/structure of a module being changed to reflect developments in subject understanding
- b. The content/structure of the course being changed to reflect the expertise of a new lecturer/ tutor
- c. The closure of a module due to low numbers of participants
- d. The closure of a course due to low numbers of participants
- e. The title of your course being changed
- f. The materials required for your course being changed (eg different textbooks)
- g. The overall assessment methods for your course being changed
- h. Other [please specify]
- i. Don't know

12. [ASK ALL] How concerned, or otherwise, would you be in each of the following situations?

*Very concerned/Fairly concerned/Not very concerned /
Not at all concerned*

- a. The vice-chancellor/president of your university changed
- b. Your university had to close down while you are still studying
- c. Your university had to close down while you are still studying, and you were offered a place on a similar course at another university
- d. A lecturer for one of your modules changed

- 13. [ASK ALL]** Should your university have to close while you are studying a course there, which of the following actions, if any, would you most want to occur? *Please select and rank your top 3 options.*
- a. A full refund of tuition fees for all years of the course studied to date
 - b. A partial refund of tuition fees for all years of the course studied to date
 - c. transfer onto a similar course at another university
 - d. Your university to be taken over by another university, with your course to continue
 - e. A transfer of your academic credits achieved to date to another university
 - f. None of the above
- 14. [ASK ALL]** The Office for Students is being set up to protect the interests of students whilst studying at higher education institutions. Which of the following functions, if any, do you think it should prioritise? *Please select and rank your top 3 options.*
- a. Ensuring all universities offer a good-quality education
 - b. Making sure students are well-informed to make choices about their course
 - c. Ensuring that all universities protect students' academic interests
 - d. Ensuring students are protected if a university closes, either by transferral onto similar courses elsewhere or by a refund in fees
 - e. Encourage competition between universities in the interests of students
 - f. Promoting more choice when students are applying about what and where to study
 - g. Ensuring universities offer value for money
 - h. Protecting the reputation of a university education
 - i. None of the above

This publication has been produced by Universities UK (UUK), the representative organisation for the UK's universities. Founded in 1918, its mission is to be the voice of universities in the UK, providing high quality leadership and support to its members to promote a successful and diverse higher education sector. With 135 members and offices in London, Cardiff (Universities Wales) and Edinburgh (Universities Scotland), it promotes the strength and success of UK universities nationally and internationally.

The findings discussed in this report are based on research carried out by ComRes in early 2017.

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June 2017

ISBN: 978-1-84036-380-7



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