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**Profit for knowledge's sake: The challenges for
universities in constructing a brand in the twenty-first
century.**

A thesis
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Abstract

This thesis investigated how the challenges of constructing a brand in the twenty-first century are impacting on the idea of a university.

There is a growing evidence-base in the literature that demonstrates the influence of marketisation on universities. However, there is little research that explores the intersection between the application of disruptive innovation to universities, how they might respond to disruption and the subsequent effect on the construction of their brands. This raises questions about how marketisation has impacted the internal culture of universities, how institutions manage their brands and, how leadership should confront challenges to the idea of a university.

The theoretical framework for this thesis was informed by social constructionism. The data was collected by undertaking semi-structured interviews with 24 senior leaders and marketing professionals employed by universities in the United States of America (USA), the United Kingdom (UK), Australia and, the People's Republic of China (China). The data was analysed by applying the step-by-step guide to thematic analysis provided by Braun and Clark (2006).

This study found that there was tension as universities constructed and communicated their brand identities; tension as most of the participants perceived that some external stakeholders had constructed different ideas from them about what a university is and represents; and, tension as many of the participants observed senior leadership determining the most effective strategies to balance an inherent desire to protect the traditional idea of a university against the complex challenges that were confronting them.

How the participants accounted for this tension was of critical concern to this study. Universities are complex organisations and the findings suggest that there is the potential for tensions to increase as the participants

attempt to make sense of the changing demands from their diverse stakeholders.

The credential is referred to in the literature as the heart of the business of universities (Milligan & Kennedy, 2017) and therefore establishing trust in the credential is core to its brand identity (Galbraith, 2016). A conclusion from this research is that it seems likely that the value of the credential will continue to decline as employers seek a differently skilled workforce. This may have a substantial impact on the 'product' that a university has to 'sell' and as a consequence their brand identities may need to reposition.

The findings presented in this thesis build upon an understanding of the literature that relates to the construction of the university brand, the idea of the university and how disruptive innovation applies to universities.

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From the outset, undertaking this doctorate has been one of the hardest, and yet most satisfying things that I have done in my life. When I embarked on this journey I knew it would be challenging, particularly as I was undertaking the research at the same time as I was employed as a senior executive at the University of Waikato.

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Chapter 1 – Introduction

As a professional marketer who has worked across a number of industries and who is presently engaged with the marketing of a university, I have often wondered whether the difference between branding in the traditional sense of the firm, and branding in a university context, is that there is an absence of shared purpose, and therefore no set of agreed values in universities. If this is the case, is this difference due to the *loosely coupled* (Weick, 1976), at times autonomous, at times highly regulated, diverse and complex organisation that is the university, or to other factors?

I began my career in higher education in 2008 and I was initially surprised at how commercial much of the university sector appeared to be. However, it soon became apparent that market-driven strategies were not implemented in the same way as they are in other organisations and industry sectors that I had previously worked in. For example, as I set about developing marketing plans in the way that is expected in other (non-tertiary education) organisations, I immediately encountered resistance. This resistance was particularly from senior academics, concerned about resources being diverted away from academic investment and into commercially focused 'sales' goals. Another example of how universities differed from other organisations that I had worked was the lack of differentiation that I detected when reviewing the marketing activities of other universities. I was surprised at how similar the marketing messages were across numerous universities, with any variance focused on 'soft' points of difference, such as location and aspects of the student experience.

The observed differences between purpose, and how the university and the traditional commercial organisation functions is important in the context of this study. Toma (2012) provides a succinct explanation for this distinction: a university differentiates its value proposition from other universities in the pursuit of greater legitimacy, raising funds to further their missions, whereas the traditional commercial organisation differentiates to explore a market segment in the pursuit of greater profit.

In developing the research proposal for this thesis, I was interested in exploring how universities arrive at their brand positioning, how they differentiate themselves from competitors, and how developments that could impact on university brands are being managed within institutions. I was also interested in understanding the aspirations of universities (of various types), how much similarity or difference there was in these aspirations and, whether there were different aspirations even within the institution.

Influential researchers describe a strong brand as one that successfully connects key functional and emotive associations in the minds of customers and other important constituents (Aaker, 2014; Chapleo, 2011; Holt, 2002; Edelman, 2010; Keller & Lehmann, 2004; Napoli, Dickinson, Beverland & Farrelly, 2013). The primary objective of developing a strong and successful brand is to establish a level of competitive superiority, and differentiate the product and service from others in the market (Di Maggio & Powell, 1983; Holt, 2002; Napoli, Dickinson, Beverland & Farrelly, 2013). Many researchers and commentators have proposed that branding creates loyal customers, advocates, even evangelists out of those who experience it. And, whether it be higher education or a traditional commercial organisation or product, the brand represents everything that the university, firm or product does, represents and delivers (Aaker, 2014, Craig, 2014; Dean et al., 2016; Galbraith, 2016; Holt, 2003; Mattin, 2017).

That the university has a brand is generally understood in academic circles (Dean et al., 2016). Clark (1972), writing about the organisational *saga*, described by him as a shared belief that binds people in the organisation to a common purpose, did so using language normally associated with the commercial organisations' understanding of brand. For example, Clark (1972) claimed that universities must present a strong vision, define and articulate service standards that are communicated as ideals for the organisation as a whole, and instil a belief in its people that service is not just the responsibility of non-academic staff, but rather an organisation-wide commitment. He suggested that this commitment may

eventually become central to the organisation's saga. In more recent times, Jevons (2006) claimed that, while many higher education professionals believe that their institution does not have a brand, it is more likely that their institutions have not effectively managed it.

An historical perspective appears to be important in the construction of the university brand. In tracing the development of the idea of a university, from von Humboldt (1793 & 1809) and Newman (1852) to Habermas (1989), the principal concern appears to be the preservation of the integrity of knowledge and, directly related to the preservation, the subsequent pursuit of "knowledge for its own sake" (Newman, 1852, p.104). In the face of considerable change and increasing external influence and scrutiny, universities appear to remain committed to the ideals of academic freedom, the pursuit of knowledge, and their role as the critic and conscience of society (Jones, Galvin & Woodhouse, 2000; O'Hear, 1988). A notable exception appears to be China, where the political and cultural influences have subdued these fundamental values. Therefore, the idea of a university, while still featuring the exploration of new knowledge, presents as a different construct in this country (He, 2002; Xiong, 2012; Zhang, 2017).

The literature (to be discussed in more detail in Chapter 3) suggests that the great strategic change in higher education across institutions, both public and private, has been toward a more revenue-driven, market-responsive approach. Higher education researchers and commentators have observed professional managers responding in more entrepreneurial ways to external opportunities and, referring to those they engage with as customers and clients (Bok, 2003; Chapleo, 2011; Marginson, 2008; O'Byrne & Bond, 2014; Sharrock, 2017). According to Bok (2003 & 2015) and Toma (2012), institutions thus need to manage greater complexity, and even ambiguity, while competing more directly and intensely, whether for students or resources.

However, in what appears to be something of a paradox, universities must also represent themselves as similar to other institutions to enhance their

legitimacy, particularly those they aspire to be more aligned with (Donoghue, 2008; Toma, 2012; Wexler, 2016). Brand development in universities mirrors this approach, with universities across the globe seemingly differentiating at the edges and seeking legitimacy without “moving too far from the herd” (Toma, 2012, p.6). It seems that aligning the university brand to one regarded as having greater prestige is a common strategy in order to climb to the next level (Di Maggio & Powell, 1983; Bok, 2003 & 2015), move into a more favourable segment (Donoghue, 2008; Mampaey, Huisman & Seeber, 2015; Toma, 2012), and/or improve their global institutional rankings (Hazelkorn, 2017; Wedlin, 2014).

The respective approaches to branding by universities present as variations on a common theme (Bok, 2003; Dean et al., 2016; DiMaggio & Powell, 1983; Mampaey, Huisman & Seeber, 2015; Toma, 2012). Put another way, while universities may claim to have different missions, they may be more similar than they are different (Delmestri, Oberg & Drori, 2015; Davis, 2013). Within this context, universities appear to be deploying consistent and formulaic strategies intended to simultaneously enhance the resources available to them and to increase their prestige (Brewer, Gates, & Goldman, 2002; Deephouse, 1999; Mampaey, Huisman & Seeber, 2015; Toma, 2012).

The ability for universities to increase their legitimacy via a seemingly similar and undifferentiated set of values and strategies, is likely to be placed under closer scrutiny due to the emergence of digital disruption. Digital disruption is defined by Edelman (2010) and Garman (2014) as the phenomenon whereby today’s consumers have access to rapid internet that provides instant, digitised information, that places them in a position of unprecedented influence over an organisation’s brand. For universities, digital disruption potentially represents a higher level of transparency and authenticity than is typically required from them (Booth & Matic, 2011; Edelman, 2010; Kenney, Rouvinen & Zysman, 2014; Limba, Kiskis & Jurkute, 2014; Mattin, 2017). It also presents opportunities for product innovation, with new credentials and programmes becoming more

available to existing markets and, to markets that may not otherwise have had access to higher education (Christensen & Eyring, 2011).

It would appear that brands are important for universities and, increasingly so in an environment where the list of new demands and new stakeholders for universities to service grows, creating an expanding set of expectations for, and from them (Belanger, Mount & Wilson, 2002; Bok, 2015; Craig, 2015; Jevons, 2006; Napolitano, 2015). In the past three decades, significant developments have included: the growth of research and development worldwide as a national strategy for competing in an emerging global knowledge economy (Marginson, 2007); the expansion of disciplinary knowledge and with it tertiary courses of study (Bok, 2015; Sevier, 2011); growth in student enrolments, at both undergraduate and post graduate levels - elite to mass to universal access (Trow, 2000); more public demands on Government funding resources from areas such as health, welfare and infrastructure (Chapman, 2012; Dill, 2003; Jongbloed, 2003); expanding international student markets (Marginson, 2008); a focus on student debt and public/private benefits (Norton, 2012); and pressure on them to have more direct links with commerce and industry (Bok, 2003; Craig, 2015; Toma, 2012).

A major key development for universities is the continued evolution of marketisation. Marketisation, defined by Jongbloed (2003) as the process of changing state-owned or managed enterprises into market-oriented or market-led enterprises, has most notably influenced universities through their more recent understanding as producers of knowledge, human capital and intellectual property (Bok, 2003; Clark, 1988; Craig, 2015; Marginson, 2008; Wedlin, 2014).

For better or worse, these developments all have the potential to affect the quality and value of tertiary education to society. With no sign that the pace of change will ease, this research thesis investigates how the role of universities has changed over time, how they manage brand and, how institutions will meet the challenges of the twenty-first century as they construct and communicate their brands.

Objectives of this thesis

The overarching objective of this thesis was to explore how the challenges of constructing a brand in the twenty-first century are impacting on the idea of a university. The study used a social constructionist lens to explore how the participants, each of whom was employed in a senior role in a university, constructed their university's brand in their professional and academic capacities.

To achieve the overarching objective, the research questions for this study were:

Research Question 1. What are the strategic challenges for universities in constructing a brand in the twenty-first century?

Research Question 2. What are the internal challenges that universities experience as they construct their brand identity?

Research Question 3. What is the role of leadership as universities construct their brand identity in the future?

This thesis applied a thematic analysis through the lens of Social Constructionist Theory to the data that was obtained from the responses to 24 interviews with university senior leaders, academics and marketing experts across the USA, the UK, China and Australia.

I selected these countries for this investigation because I considered that they presented a broad representation of the challenges being faced by universities across the world. The university system in the USA is the largest in the world and has the greatest number of institutions ranked in the top 100 of the global university rankings (QS, 2017). I included the UK in this study because it features a diverse range of institutions, from some of the oldest and most prestigious universities in the world to a large number of newer institutions, known as the post '92 universities. At the time that I undertook this study the policy environment in the UK was rapidly changing and I was interested in exploring how universities were responding to these changes. I selected Australia for this study for three reasons. First, I believed that the southern hemisphere should be

represented. Second, the Australian system had recently been subject to fundamental changes in its policy settings and funding environment and I was interested to understand how universities in Australia were responding to these changes. Third, Australia is my home country and it is where I began my career in universities. Therefore, it is a country that I am very familiar with and where I have many personal and professional connections. And finally, I included China because this is a university system that is growing rapidly, expanding to meet the demands of the knowledge economy and doing so in a political and cultural environment that contrasts from the other countries selected for this research.

Significance of this research

This research has the potential to contribute to the existing literature on disruptive innovation, university branding and the idea of the university.

In relation to university branding, previous studies show that while strategy in higher education fits neatly into notions of Organisational Theory, universities are more comfortable with legitimacy and isomorphism than they are with differentiation (Delmestri, Oberg & Drori, 2015; Di Maggio & Powell, 1983; Toma, 2012; Wexler, 2016). There are claims of differentiation but, as Davis (2012 as cited in Hilmer, 2012) described, all universities are essentially doing the same thing. This limited differentiation means that university brands appear to exist within parameters, or a frame (Deephouse, 1999; Mampaey, Huisman & Seeber, 2015), with the risk of becoming an exception both undesirable as the university seeks greater legitimacy (Donoghue, 2008; Toma, 2012; Wexler, 2016) and commercially unsustainable (Bok, 2003). This suggests that there is likely to be a compromise between the competing interests inside universities as they seek to find the balance point where the institution is “as differentiated as legitimately possible” (Deephouse, 1999, p.162). This study examines whether this apparent compromise is sustainable in the context of the challenges for universities in the twenty-first century.

The second contribution of this research relates to the role of senior

leadership in universities. The brand is a strategic asset for universities to manage and the challenges of constructing them in the future may require a strategic response (Aaker, 2014; Galbraith, 2016; Keller & Lehmann, 2004). The changes needed to meet the strategic challenges of constructing a brand for the university in the twenty-first century are likely to require committed and visionary leadership to navigate complex and perhaps contradictory landscapes (Afshar, 2017; Birnbaum, 1989 & 2000; Bolman and Deal, 2017; Lucas, 2015; O'Reilly & Tushman, 2013). Therefore it is important to understand the role of the senior leader in universities.

The third contribution towards existing literature concerns the application of Christensen and Bower's (1995) theories about disruptive innovation to higher education. The literature suggests that "what has been missing, until relatively recently, is experimentation with new models that successfully appeal to today's non-consumers of higher education" (Christensen, Raynor & McDonald, 2015, p.15). This study investigates the implications for university brands in the context of disruptive innovation.

Structure of this thesis

This thesis is organised into eight chapters. This chapter, Chapter 1, introduces the research questions for this investigation. This chapter also provides an insight into my interest in the topic, the roles that I have had that are relevant to the study and the significance of the research.

Chapter 2 provides important background context for the field research and, in relation to this study, provides an understanding of some of the cultural, historical, political and economic context for each university system. It also includes a high-level review of some of the data available on the four university systems in which the universities that formed this research were located.

Chapter 3 examines the literature on brand, disruptive innovation, marketisation and the university. This chapter traces the evolution of the

idea of a university, its history and the challenges that marketisation has created for the modern university. The literature concerning prestige, legitimacy and rankings is examined. The chapter then discusses the theoretical approaches to brand and the literature that relates to university branding. There is a review of the literature that examines the more recently identified phenomenon, digital disruption and the chapter concludes with a discussion of the literature that concerns disruptive innovation.

Chapter 4 provides an explanation of the social constructionist epistemology that underpins the study, the methodological rationale that determined the research design and the interpretive paradigm that shaped the social inquiry. It also outlines, in detail, the data collection and analysis methods.

Chapters 5 to 7 present the empirical research findings. In these chapters I describe and discuss the themes that emerged from the analysis of the interviews and draw from the literature to explore the potential implications for universities. The three findings chapters respond to the research questions for this study as follows: (1). Strategic challenges for universities as they construct their brands: focuses on how key external stakeholders, notably employers and government, view universities of the twenty-first century. This chapter discusses how these views may be at odds with how universities themselves see their role and whether this has implications for the construction of university brands (Chapter 5); (2). Brand tension inside universities: highlights how the different roles within universities construct and communicate the university's brand (Chapter 6), and; (3). Leadership dilemma: discusses the role of the senior leader in universities and, how leadership is likely to respond to the strategic challenges of constructing brands in the future (Chapter 7).

Chapter 8 draws together the conclusions from these findings. This chapter also outlines the implications from this study, its limitations, and points towards areas for further investigation in this field.

Chapter 2 – Background to the research – university system context

Introduction

The geographical, political, economic, cultural and historical perspectives appears to be an important consideration in responding to the research questions. Accordingly, the aim of this chapter is to provide the reader with an overview of the country and system in which the universities were located.

In the first part of this chapter, I present a brief overview of aspects of the university system for each of the countries that are included in this study. In the second part of this chapter I provide a review of some of the available data on enrolments, participation, GDP, rankings and international enrolments for China, the USA, the UK and Australia.

USA

In the USA, higher education is largely independent from federal government involvement and is highly decentralised (NCES, 2017). State governments, local and institutional authorities, and non-governmental organisations all tend to have roles in the governance of American universities (Napolitano, 2015). However, this varies from State to State, with many having considerably reduced their funding for universities in recent decades (Bok, 2015; Dill, 2003; Napolitano, 2015). Importantly, as opposed to the UK, China and Australia, the policy settings in the USA are designed to incentivise universities to collaborate with the private sector and, as a result, to become more entrepreneurial and to innovate (Bok, 2003; Dill, 2003; Marginson, 2013). Gruber (2014) referred to the American higher education system as an example of where the commoditisation of universities has resulted in a perceived “academic sell out” (p.166). However, according to Bok (2003) these policy settings represented a significant change to the importance in which universities were held in American society in comparison to other countries around the world. For example, Bok (2003 & 2015) argued that because this change was accompanied by interest from the business community, increased

media awareness and more funding from government agencies and foundations, tensions within the university were heightened as the role of critic and conscience of society was subject to greater scrutiny and pressure.

Bok (2015) and Napolitano (2015) described a higher education system that has over 124,000 public and private schools; over 2,000 postsecondary non-degree career and technical schools; and, over 4,000 degree-granting institutions of higher education. The National Center for Educational Statistics in the USA reported that, of the higher education institutions in the USA, over 1,600 award associate degrees, approximately 2,400 award bachelor's or higher degrees and over 400 universities award research doctorates (NCES, 2017). In terms of scale, the American university ranges from small institutions with less than 1,000 students to large universities with over 50,000 enrolments (NCES, 2017). Bok (2003 & 2015) categorised universities in the USA under the following headings: research universities; comprehensive universities; four-year colleges; community colleges; and for-profit institutions.

Research Universities

The smallest group in number, but the largest in terms of budget and endowment, are the research universities (Bok, 2003). There are approximately 200 research universities and these are regarded as the most established universities in the USA, accepting on average just 20% of total domestic university applications received each year (NCES, 2017). Despite being the smallest group, research universities dominate national and international rankings compared to the other categories. Examples of some of the better-known research universities include Stanford, Yale, Princeton, Michigan, Harvard, Columbia, and Chicago.

Comprehensive Universities

As the name suggests, comprehensive universities provide a broad range of courses and tend to be public, or State universities where most research is of an applied nature, with established and featured connections to communities and industry. In comparison to research

universities, comprehensive universities are characterised by large student enrolment numbers that exceed 40,000 students. These institutions tend to be less selective in terms of the applicants they will accept than the research universities (Bok, 2003). Comprehensive universities are typically more dependent on public funding than research universities (NCES, 2017). Some of the more well-known institutions in this category are Maryland, Alabama and Ohio.

Four-year Colleges

Four-year colleges comprise of a large group of universities that tend to be smaller, in terms of student enrolments, than both research and comprehensive universities (Bok, 2003). Napolitano (2015) wrote that four-year colleges are often referred to as liberal-arts colleges. These institutions also tend to be wide-ranging in terms of their financial sustainability. Bok (2015) noted that, more than any other group, the four-year college diminished in number due to the influences of marketisation and reductions in State financial support. The four-year college is also often founded in a religious orientation. For example, there are over 200 Catholic universities that fall within this category in the USA (Bok, 2003).

Community Colleges

A very large, publicly funded group of institutions that account for nearly 40% of total undergraduate enrolments are known as community colleges (NCES, 2017). These institutions were founded to provide a lower cost alternative to universities and Bok (2003) noted that often a student would spend two years at the community college before transferring to the four-year college for the final two years. It has been reported that this traditional path to the four-year college has been jeopardised because students have elected to stay at the community college for financial reasons (Whitmire, 2019). According some commentators, this has contributed to placing many of the four-year college institutions in financial stress as their pipeline of students into a third year has diminished (Bok, 2015; Whitmire, 2019).

For-profit Institutions

This is the most recent category to emerge and it appears that it has grown as a result of improved access to high speed internet (Bok, 2015; Wedlin, 2014). Bok (2015) stated, “although a very large sector with over 1,300 institutions, the largest 15 represent more than 60% of the total enrolments” (p.12). The offerings are diverse, from basic vocational and professional development courses, to bachelor’s and master’s degrees. A significant difference is that for-profits are able to provide a lower cost education because they tend to rent their facilities, do not provide comprehensive student services, and they do not engage in costly research activities (Bok, 2015). Quality has been a significant issue in the for-profit institutions and Bok (2003) noted that there is “a steady drumroll of negative publicity about the sector’s recruiting abuses, low graduation rates and high default rates on student loans” (p.13) and that has impacted negatively on enrolments. The largest institution in this sector is the University of Phoenix, which has over 500,000 student enrolments (NCES, 2017).

Although Bok (2015), Craig (2015) and Napolitano (2015) had some concerns about aspects of the modern-day version of higher education in the USA, they did not believe that it should reinvent itself, nor that it has failed to serve public need. They suggested that the expansion of educational opportunities in the USA from a system that served a small segment of the population into mass higher education is, in their opinion, a remarkable achievement. Bok (2015) and Napolitano (2015) noted that, despite rising competition from universities around the world, international students continue to aspire to study at universities in the USA and, over the past decade the growth in this cohort has exceeded 60% (QS, 2017).

This does not mean that the system in the USA is not experiencing any problems. The higher education market is currently dealing with a range of issues and the absence of any central policy and system of overall regulation, such as the equivalent of either the UK’s, China’s or Australia’s is potentially at the root of these problems (Marginson, 2013; Napolitano, 2015). Marginson (2013) stated that the funding model in countries outside

of the USA typically results in a market where there is a quasi-system of deregulation, which fixes price, fixes demand, fixes supply or is a combination of these regulatory measures. In contrast, the market for higher education in the USA is far less regulated and as a result tuition fees have climbed as demand from students has increased (Bok, 2015).

The higher education system in the USA has also been subject to much criticism, notably from students questioning value-for-money, and from employers questioning the quality of graduates and their readiness for the workforce (Craig, 2015; Napolitano, 2015). The issue for Bok (2015) is not that universities should be free from criticism or the expectation that they must improve, sometimes significantly. What Bok (2003) and subsequently Napolitano (2015) objected to is that critiques of a particular weakness or problem too often generalise the issue to define the whole tertiary education system, without evidence, and without acknowledging that higher education does not control many of its circumstances. These authors wrote that the sector is continually at risk of volatility in the economy, further declines in State support, concerns about student debt, and the unpredictability of endowment fundraising returns. They suggested that these are the critical factors that universities are coming to terms with in the USA.

United Kingdom

The United Kingdom of Great Britain and Northern Ireland, which is usually shortened to just the United Kingdom or UK, is a political union made up of four countries: England, Scotland, Wales and Northern Ireland. Universities in the UK date back to mediaeval England, with Oxford (est. 1096) and Cambridge (est. 1209) amongst the world's oldest universities.

A major change to UK higher education occurred in 1992 with the abolition of the 'binary divide' between universities and polytechnics (HEFCE, 2017). The Further and Higher Education Act 1992 prescribed that the polytechnics and the Scottish central institutions all should become universities, nearly doubling the number of universities in the UK. As a

result of this change, there are currently 128 universities in the UK and the central co-ordinating body for universities in the United Kingdom is Universities UK (HEFCE, 2017). The universities in the UK share an undergraduate admission system, operated by Universities and Colleges Admissions Service (UCAS). This centralised admission process is also a feature of the Australian and Chinese systems and represents an important distinction from the USA. The effect of a central admissions system is to regulate the market for undergraduate student enrolments (HEFCE, 2017). In other words, rather than applying to the admissions' department of a university, as is required in the USA, a student in the UK, Australia and China applies through a centralised system, which allows the student to apply to several universities at once, in each case nominating a preference: first, second, third and so on. This allows all of the universities in the system to understand how many students have selected their university as a first preference, as opposed to the USA where universities have no knowledge of a student's preferences. The marketing benefits (and savings) to universities in the UK, China and Australia are obvious compared to the USA. For example, where universities become aware that they have sufficient preferences from students to achieve enrolment targets, they can reduce their marketing spend. In the USA, universities have less confidence about likely enrolments and therefore they need to maintain their marketing spend to maximise opportunities to achieve their enrolment targets.

Another feature of the UK system (and Australia and China) that differs from the USA is that when students apply for admission to a university they select to enrol into a qualification in a specific field of study (normally referred to as a faculty), rather into a generalist degree. In the USA, a student applies to the university and, for the first year or more the student takes courses from a variety of fields and only selects a major at the end of the first or perhaps even during the second year (NCES, 2017).

Since 2012, the increase in student fees has become a significant issue in the UK (Adonis, 2017). The government sets the limits for tuition fees and each individual university in the UK is then able to determine its own fee,

on the condition that the fee does not exceed the government limit (HEFCE, 2017). In 2017 this limit was £9,000 (HEFCE, 2017). Walker and Warrell (2017) noted that while the limit was levied by most universities in England, it is not compulsory, and indeed universities in Scotland and Northern Ireland elected not to do this to the same extent as universities in England and Wales. Fee regulation is also a feature of universities in Australia (Davis, 2013) and China (MOE, 2016). By contrast, the Government has little control over what universities charge in the USA (Bok, 2003; Craig, 2015).

A major difference from the USA is that in the UK, and Australia, tuition loans are repaid through the income tax system, once a student reaches a prescribed income level (Norton, 2017). This system, referred to as contingent loans, is not available in the USA. In all three systems (UK, USA, Australia) student debt is a significant issue and a regular topic of discussion in the national media (Adonis, 2017; Bok, 2003; Marginson, 2013). However, a renowned Australian academic, Bruce Chapman, while discussing student debt, highlighted that in Australia and the UK there were better systems in place to manage debt collection. Chapman remarked, “the critical difference between us and the USA is that we have a collection mechanism that depends on the capacity to pay, and they don’t. The problem is not the size of the debt, it’s how it’s collected” (Chapman as quoted in Hare & Ross, 2017).

In recent times, the primary architect of the UK tuition fee financing system has become a voice of concern. Andrew Adonis, a key advisor to the UK Government, has been quoted in the media as regretting his part in developing the new financing system and accused the government of effectively “running a Ponzi scheme that has loaded students with debts that may never be repaid” (Adonis, 2017, para. 2).

It would appear that Adonis (2017) is not alone in his assessment of the funding model for universities in the UK. According to Julia Goodfellow (former Chair of Universities UK) after years of policies designed to ensure

more students have a university degree, the price for that credential is now considered too high by many. Goodfellow claimed:

The number of university applicants in the UK has fallen by 25,000 in 2017, a decrease of 4 per cent on the previous year. It would appear that there are some very interesting dynamics at play in the UK, not the least of which is BREXIT [the impending withdrawal of the United Kingdom from the European Union] so whether this decline is symptomatic of a wider, global concern only time will tell. (Goodfellow as quoted in Walker & Warrell, 2017, para. 15)

China

There is a belief in China that by increasing higher education student enrolments this would have the effect of improving the overall population's quality of life and enhance national competitiveness in a globalised world Zhang (2017). In his article that discussed how China was developing a world-class university system, Marginson (2015) stated that, "building a great system is not the same as having world-class universities in terms of research outputs. China wants both" (p.2).

The Cultural Revolution period (1966-1976) was a time when communist ideology was the primary objective of the Chinese government and Western, or capitalist ideologies were expelled from Chinese society (He, 2002; Tran, 2017; Zhang, 2017). However, the post-cultural revolution period marks an important point for the expansion of the higher education system in China (Mok, 2016). Since the end of the cultural revolution, the Chinese government has invested heavily in higher education and this investment continues today (MOE, 2016).

In China, only 4% of the cohort of 18–22-year-olds or, about three million students, attended post-secondary institutions in 1996. This rose to 24% of the age cohort, or about 27 million students, by 2009 (Mok, 2016). The Chinese government expanded its tertiary education system from elite to mass participation by establishing a number of private higher education institutions, called minban colleges, run largely on market-based principles (Mok, 2016). These minban offer programs that are more practice-oriented or applied in nature (Michael & Gu, 2016). The number of minban

institutions has risen from 39 to 727 in the past 15 years and their enrolment numbers increased from 22,232 students in 1997 to 557,520 in 2013 (Michael & Gu, 2016; Mok, 2016).

The Ministry of Education in the Republic of China (MOE) states that China's higher education system comprises a number of levels (MOE, 2015). Organisationally, it is divided into two distinct sectors: regular higher education and adult higher education. As of 2015, the MOE reported that there was a total of 2,845 Chinese higher education institutions (HEIs) in both the regular and adult higher education sectors (MOE, 2015). According to the MOE, 90% of China's HEIs (2,553) are in the regular higher education sector and over 70% of undergraduate students are enrolled at regular higher education institutions. Admission to a regular higher education institution is dependent on high school graduation and achievement in the Gaokao – National Higher Education Entrance Examination. Nearly nine million students take the Gaokao annually (MOE, 2016).

Not all Chinese institutions of higher education offer degrees, many offer only graduation certificates (Mok, 2016). Approximately 1,200 institutions in the regular higher education sector are academically oriented and grant degrees. The remainder focus on practical and occupational skills and award graduation certificates (MOE, 2016).

According to Michael and Gu (2016), joint Chinese-foreign educational programs and institutions in China have become increasingly common. These include partnerships between Chinese and foreign universities, such as NYU Shanghai (New York University with East China Normal University), the Joint Institute of Engineering (a collaboration between Sun Yat-Sen University and Carnegie Mellon University) and, most recently the University of Waikato joint institute with Zhejiang University City College. Mok (2016) observed that it is increasingly popular for students to study for two years at a Chinese university and for two years at a university in another country, such as the U.K., Australia or the USA. Further, according to Michael and Gu (2016), China also uses education as a form

of “soft power” (p.14) to increase its influence in other countries. The authors referred, as a prime example, to the Confucius Institute program, which operates at higher education institutions around the globe to promote Chinese language and culture.

The motivations for why Chinese students enrol at university has been researched. Murphy (2016) observed that a common sentiment expressed by students in China is “my dream is to attend university in the USA” (p.1). According to him, many Chinese believe that the USA has the best institutions of higher education in the world, a view supported by multiple global rankings agencies. The universities in the USA dominate all of them, with approximately 50 universities ranked in the top 100 (Marginson, 2013; QS, 2017). This sentiment has translated into substantial enrolments of Chinese students in universities outside of China, and rankings agency Quacquarelli Symonds (2017) reported that China sends more students abroad than any other country in the world. Mok (2016) claimed that the move to study abroad dates from the end of the Cultural Revolution in the late 1970’s and, now around 700,000 (MOE, 2016) Chinese nationals are enrolled at foreign educational institutions, with a third of these students enrolled at institutions in the USA. In more recent times it would appear that the Chinese student is becoming more selective about which university to enrol in (Mok, 2016). Murphy (2016) stated:

The ambitions of Chinese students are shifting: no longer are they attracted just by glittering names. Pursuit of education abroad is becoming an end in itself. The growing Chinese middle class prefers a well-rated university overseas to a second-tier option at home. (p.7)

To put this in perspective, the Times Higher Rankings in 2017 only featured two Chinese universities in the top 100: Peking University and Tsinghua University. These two universities accept 6,000 new students each year (MOE, 2016). As a percentage of Chinese university entrance exam participants, this represents one-twentieth of one percent of aspiring students. This equation presents significant challenges for a student that is attempting to access a high-quality university education in their home

country. It also helps to explain why Chinese students are motivated to seek a university education overseas.

Australia

As noted by Zyngier (2012), Australia has embraced the OECD definition of equity in education as its starting point, which states: “every child should be able to achieve her potential regardless of social, cultural or economic background or their relationship to property, power or possession” (Zyngier, 2012).

In Australia, all 43 Australian universities (40 public universities, one private university and two international universities) must engage in some research if they are to meet the criteria for university status as set out in the *National Protocols for Higher Education Approval Processes* (NPHEAP, 2007). These national protocols specify that, among other things, all Australian universities must:

Have a culture of sustained scholarship which informs teaching and learning in all fields in which courses are offered, and undertake research leading to the creation of new knowledge and original creative endeavour in fields where research masters and doctorates are offered.
(NPHEAP, 2007, p.10)

In addition, universities, other than those with a specialised university title, must offer higher education qualifications across at least three broad fields of study (Davis, 2013; Marginson, 2007a; Norton & Cherastidtham, 2014). These definitions effectively preclude any form of a teaching-only university in Australia.

An important development for universities in Australia was initiated in March 2008 when the Australian Government undertook a review of higher education. The review was led by Professor Denise Bradley and deemed necessary in order to develop and sustain its global reputation and provide the needed impetus to fuel the knowledge economy (Bradley et al., 2008). In response to the recommendations of the Bradley review and, after consultation with key stakeholders, the Australian Government committed

to a series of reforms aimed at making the Australian system more demand-driven (DEEWR, 2009).

These reforms signalled a move towards a more centralised system of regulation for the entire tertiary education sector. The issue of regulation and jurisdiction is important, because the funding model introduced by the Commonwealth legislation in 2010 incentivised students to seek places at Commonwealth regulated and funded public higher education institutions and, through the deregulation of places, incentivised institutions to compete for these students (Williams & Pillai, 2012).

Williams and Pillai (2012) stated that the implementation of a demand-driven system signalled a significant policy shift for the higher education sector, towards a broader marketisation agenda. However, Chapman (2012), Davis and Craven (2012), and Williams and Pillai (2012) cautioned that, on the one hand the Government has created an open market by lifting restrictions on university enrolments. But on the other, it rigidly controls what universities can charge undergraduate domestic students, imposing an upper limit on fees. This is irrespective of individual university's course entry scores, perceived teaching quality, facilities, or student demand. This funding model was subsequently adopted in the UK, as described earlier in this chapter.

The implementation of the Bradley reform policies effectively gave Australia's public universities the green light to increase student numbers and, from 2011 onwards this is exactly what happened. Many universities over-enrolled in 2011 and 2012 in anticipation of the new framework and in response to a corresponding decline in international student revenues (Norton, 2012).

In 2017 the Australian Government announced that it was once again reviewing its higher education policy settings. In response to a discussion paper issued by the Minister of Education, an academic from the Centre of Higher Education at the University of Melbourne observed:

More than one-third of Australians now hold a bachelor-level qualification or higher and therefore in many ways the sector has successfully navigated the transition towards mass participation. However, this transition has brought with it hand wringing about admission standards, student attrition, student debt and the quality of graduates. (James, 2017, p.2)

Subsequent to James' remarks, in 2017 the Australian Government proposed a series of reforms to the funding of higher education. At the heart of the Government's proposed reforms was that, while universities are expensive, they are also the foundation of future wealth via an innovative and productive economy. Minister Birmingham noted, "it's not just that the highly skilled graduates they produce become nurses, teachers, information technology experts, engineers and the next titans of Silicon Valley, their research lies at the heart of what universities are: creators of new knowledge" (Birmingham as quoted in Hare & Ross, 2017, para. 11).

At the same time, Minister Birmingham (2017) noted that universities contribute to the shaping of modern communities. That is, not only do graduates earn more than non-graduates, there is also evidence that they "are healthier, better parents and more likely to volunteer [in their communities]" (Birmingham as quoted in Hare & Ross, 2017, para. 12).

Important in the context of this research, Birmingham also suggested that these latest reforms come "in an age of creeping 'credentialism', as master's degrees are becoming entry point qualifications for many jobs, in much the same way as bachelor's degrees, diplomas and higher school certificates were before them" (para. 16).

While the reforms as proposed did not progress in exactly the way the Government had planned, there were significant financial budget cuts to the universities, the primary aim of which was to reduce the Government's financial commitment. These cuts have been met with concern by the university sector and, Norton (2018) declared that, "Australia's experiment with demand-driven university funding is over" (p.1) and while it wasn't a

failed experiment, it was an expensive one, with “the consequent enrolment boom pushing up teaching grants to universities by 50 per cent” (p.1). In summary, the demand-driven policy settings were simply too expensive for the public purse in Australia to absorb.

Regulatory framework

The following table summarises the regulatory framework for Australia, the UK, the USA and China, the four countries included in this research. The data presented in this section highlights some of the differences between systems. This is important context for this research because how universities develop marketisation strategies is at least partly attributable to their geographic location and the policy settings that exist in that country (Bok, 2003; Marginson, 2013; Norton, 2012; Norton, 2017).

The table below was prepared from information obtained from a review of the websites of the bodies responsible for the administration of universities in each of the UK, the USA, Australia and China. The table assists the reader to understand how the systems where the participants were employed may have influenced how they constructed their idea of the university and, therefore provides important context to their responses.

Table 1 - Regulatory Framework

Feature	Australia¹	UK²	USA³	China⁴
Administration	Federal (central government) policy for higher education (University) sector, State regulated vocational sector	Federal (central government)	State based system of regulation	Federal (central government)
Places for undergraduate admission	Uncapped. The university can enrol as many students into undergraduate qualifications as they wish and will	Quasi capped. High achieving (ABB+) students uncapped however funding limited to residual students	Capped and Uncapped depending on the State.	Capped. The central government allocates places to the university and the university cannot exceed

	be funded 100% by the Federal government			that quota.
Funding	The fee received by the university for domestic students comprises of a student contribution and a Federal contribution. The public funding is approximately 65%. The Student contribution is repaid through income contingent loans. Funding model does not apply to private sector or the vocational sector however HELP loans are available.	Public funding via Student contribution in the form of income contingent loans for both tuition and maintenance (HEFCE, 2012) to both higher education and further education providers. Private providers not eligible for funding	Mix of public and private institutions enjoy funding (or subsidy) for the student which varies greatly from State to State. Student fees at public universities have increased from 20% tuition in 1970 to 46% in 2006. (Geiger and Heller, 2011)	Public funding for all higher education places.
Information	Minimal. Myuniversity website provides some comparison across universities.	New regulations require 16 areas of disclosure across all institutions seeking accreditation as eligible providers.	Minimal, no means of obtaining consistent and reliable information about quality or outcomes.	Minimal, no means of obtaining consistent and reliable information about quality or outcomes.
Differentiation	None. The system encourages sameness, those that seek a differentiated position have to do so within a model where all	Increasing recognition that differentiation is important but current policy settings (like Australia) encourages sameness.	Market defined and determined.	Project 985 identified 39 universities that the government funded at a higher level than other universities. In 2009 9 of these Project 985

	are regulated and funded in the same way. (Hilmer, 2012)			universities formed the C9, the equivalent of the US Ivy League.
Price/fee for undergraduate places.	Regulated but not for international places.	Quasi deregulated. All but 8 out of 119 institutions elected to charge the maximum £9,000 per year. Deregulated for international places.	Deregulated, market driven with some price differential if the student is studying in-state in which case the student may be entitled to a state subsidy.	Regulated.
Participation	Universal	Mass	Mass	Mass

Source:

¹ Universities Australia www.universitiesaustralia.edu.au

² HEFCE www.hefce.ac.uk

³ National Center for Education Statistics www.nces.ed.gov

⁴ Ministry of Education of the People's Republic of China www.en.moe.gov.cn

In the next section some of the available published data about each of the university systems in the USA, the UK, Australia and China is reviewed.

The purpose of this high-level review is to provide contextual background and to assist the reader in understanding some of the key motivations and drivers for universities in each of these systems. Specifically, as universities compete more intensely for students and other revenue streams, the market data can provide insights into how and why particular strategies are developed and implemented. By way of an example, if domestic enrolments are declining in a particular system then universities are likely to be subject to greater financial pressure. In these situations, they may enact new market strategies, such as pursuing a greater share of international student enrolments (Marginson, 2013), or make cuts to programmes and research (Bok, 2015).

Enrolments

This section provides a review of statistical data that pertained to enrolments. The table below presents a contrasting picture and,

understanding why these trends have occurred is important. It appears that there is a relationship between enrolment trends and the strategies and resources employed by universities to maintain and/or grow student numbers (Bok, 2003; Norton, 2012). Enrolments at universities in the USA peaked in 2011 and since then there has been a steady decline. The reason most often reported is the size of student debt and whether a tertiary education presents value for money (Napolitano, 2015). Gruber (2014) and Napolitano (2015) point to media reports about lack of job opportunities, student debt and employers raising concerns about the quality of graduates as being likely contributors to the decline.

In the UK, the decline in student numbers exactly mirrors the point at which student fees were substantially increased. Again, the outlook for growth in enrolments is not positive and, with the recent BREXIT announcement, Adonis (2017) stated that universities in the UK should be expecting further declines as the pipeline of students from the European Union (EU) diminishes and changes to immigration policies affects international student quotas.

In Australia the opposite has occurred. The deregulation of places that accompanied the Bradley reforms in 2010 has resulted in steady growth in enrolment numbers. Norton (2018) and James (2017) suggest that the outlook in Australia is for continued growth in both domestic and international student enrolments, despite the round of budget cuts announced in 2017.

China is experiencing massive growth in student numbers. Accurate records of numbers of students attending universities in earlier years is not available. However, the MOE website approximates enrolment numbers, as shown in the table below. According to Michael and Gu (2016), the investment by the Chinese Government in higher education, coupled with the rapid growth in private providers (Minban), has created the opportunity for much greater access to tertiary education. The outlook going forward is for future growth, both in terms of domestic students and also the growing in-bound international student market in China (Michael & Gu, 2016).

Table 2 - Enrolments in universities 2006-2015

Students enrolled	2006	2011	2012	2013	2014	2015	2006-2015	2011-2015
USA ²	17,758,870	21,010,590	20,644,478	20,375,789	20,207,369	20,204,015	13.77%	-3.84%
UK ³	2,281,235	2,501,295	2,496,645	2,340,275	2,299,355	2,266,075	-0.66%	-9.40%
Australia ⁴	984,061	1,221,008	1,257,722	1,313,776	1,373,230	1,410,133	43.30%	15.49%
China ¹	15,000,000	23,900,000				41,395,905	175.97%	73.20%

Source:

¹ Ministry of Education of the People's Republic of China www.en.moe.gov.cn

² National Center for Education Statistics www.nces.ed.gov

³ Universities UK www.universitiesuk.ac.uk

⁴ Universities Australia www.universitiesaustralia.edu.au

Participation

According to the OECD (2019), since the end of World War II the expansion in tertiary education has been significant, and people aged 25-34 with a tertiary education now accounts for the largest demographic age group in many OECD countries. On average, across OECD countries, 39% of 25-34-year-olds are tertiary educated. However, the OECD (2019) reports that there are still notable variations across countries, noting that while the proportion of 25-34-year-olds with tertiary education is about 50% in the USA, UK and Australia, it is below 10% in China.

Further, according to the OECD (2019), the proportion of adults with a bachelor's or equivalent degree varies from 3% in China to an average of 26% in Australia, the UK and the USA. In terms of completion or graduation rates (excluding international students) for first time graduates, Australia, the UK and the USA sit at around 45%. whereas China is half that number at 23% (OECD, 2016). These statistics appear to at least partly explain why the Chinese Government is aggressively expanding the higher education sector in China.

Gross Domestic Product ('GDP')

The economic performance of the four countries included in this research is an important consideration, as this can have a significant impact on the policy settings of government. For universities, policy settings represent a strategic consideration as changes to policy settings can have disruptive

implications (Christensen, 1997; Jongbloed, 2003; Norton, 2012), Chapman (2012) remarked that what a student pays in fees is directly related to how much the Government can afford to subsidise their education. In the USA, UK and Australia, successive Governments have sought to reduce the public contribution to higher education by shifting the burden to the student (Chapman, 2012; Norton, 2012). Perhaps not surprisingly, given the participation data presented in the previous section, the exception to this has been China, where the Government has substantially invested in education, albeit off a relatively low base. The table below illustrates that China's economy is in an expansionary phase, growing at a rate considerably higher than the UK, Australia and the USA. Marginson (2015) stated that the Chinese Government appears to have made a deliberate strategic decision to invest heavily in tertiary education.

Table 3 - GDP performance

	Expenditure per tertiary student (% GDP per capita)	GDP Growth	GDP per capita
USA	20.10%	2.20%	51,433
UK	32.10%	1.20%	37,569
Australia	19.30%	3.60%	42,596
China	89.50%	7.80%	11,220

Source: QS Quacquarelli Symonds (2016)

International students

Table 4 below provides an insight into the changing global marketplaces for student recruitment. The strong economic growth in China has been matched by a significant investment in education. As a result, China is now a destination in its own right with respect to international students (QS, 2016). The USA, UK, Japan and Australia are the largest contributors to the growth in China (QS, 2016), just as these countries are also the largest beneficiaries of international students from China (Norton, 2017). The table below also indicates that the decline in overall enrolments detailed in table 3 in the USA and the UK would have been significantly greater if not for the increases in international students to those systems. This table also suggests that universities in the UK and the USA have

implemented new marketisation strategies to recruit international students, perhaps to compensate for the apparent declines in domestic student enrolments.

Table 4 - International students

International students	Inbound	Increase from 2000-2015	Outbound	Net movement
USA	784,427	65.10%	66,311	718,116
UK	416,693	86.90%	29,234	387,459
Australia	249,868	136.30%	12,092	237,776
China	442,773	687.00%	729,338	(286,565)

Source: QS Quacquarelli Symonds (2016)

University Rankings

In line with the surge in investment in both Australia and China, the global rankings of universities in these countries have similarly improved.

Conversely, with the relative decline in investment for universities in the USA and UK there has been a negative impact on global rankings for universities in these two systems. The table below highlights the movement that has occurred in global rankings.

Table 5 - Number of universities ranked in the top 800

QS Top Universities	2013	2014	2015	2016
USA	147	147	156	153
UK	72	73	75	69
Australia	27	30	32	35
China	25	27	30	35

Source: QS Quacquarelli Symonds (2017)

As reported earlier in this thesis, the Chinese tertiary environment is a maturing one. As it grows and implements what appears to be a deliberate strategy to improve its ranking performance, this is likely to be the detriment to universities in other systems. In other words, rankings is a zero-sum game, where a rise in rankings by one institution must result in the fall of another (Wedlin, 2014). Similarly, in Australia, where the changes to the funding model have produced something of a financial windfall to universities, they have benefited by being able to invest further

in research. This has enabled more Australian universities to be included in the global rankings. However, whether Australia can retain its growth is uncertain, given the funding cuts announced in late 2017 (Norton, 2018).

Conclusion

The funding mechanisms for higher education across the four countries shows us that, whereas China is seeking to expand its higher education system, the Governments in Australia and the UK are reviewing funding arrangements with a view to restricting the impact on the national budget. In doing so, it appears that in the UK and Australia funding is moving towards a more American style system, pushing the financial burden away from the State and towards the student and universities. This suggests that the pressure on universities in Australia and the UK to effectively market their 'products' and develop their strategic assets, such as brand identity, is likely to increase as universities compete more intensely for students, staff, research grants, commercial revenues and philanthropic donations.

Many commentators have suggested that universities are being encouraged to enact change amid a climate of policy uncertainty. Much of this has occurred as governments have enacted legislation and modified funding arrangements in response to agendas that, on the surface were intended to promote a competitive market but in reality, most believed were designed to constrain public spending (Adonis, 2017; Bok, 2015; Chapman, 2012; Napolitano, 2015; Norton, 2017).

The published data reviewed in this chapter provides a valuable context for the fieldwork. It appears from this data that marketisation is influencing university systems and, it is apparent that changes in policy settings and funding are requiring universities to compete nationally and internationally for students. The relatively expansionary approach by governments to develop policy settings that incentivised universities to grow in Australia and China is contributing to positive growth in enrolments and rankings. Whereas, the contracting policies in the UK, that has the effect of

increasing fees, appears to be contributing to declines in enrolments and rankings.

What is clear from this review is that universities are operating in an environment where change is the only constant. In this environment, the pressures on universities to enact strategies to respond to market conditions is increasing. Therefore, an understanding of the historical, political and geographic context may be an issue for senior leaders as they attempt to navigate new paths for universities in the face of evolving market and political conditions. In much the same way as Chapman (2012) forecast, the future of universities is likely to be at least in part a function of government policy and regulation, despite the influences of marketisation.

Chapter 3 - Literature Review

Introduction

In this chapter I review literature on the idea of a university, marketisation, brand and disruptive innovation.

Notwithstanding that the literature suggests that the university is a unique type of organisation, finding a university with a totally unique combination of mission, structure and organisational culture is unlikely (Mampaey, Huisman & Seeber, 2015).

However, what does have the potential to be distinctive is the historical traditions and roots of the institution, national context and geographical location (Bok, 2015; Davis, 2013). Accordingly, an understanding of how the idea of a university has evolved over time may assist in the reframing of how the university brand might develop into the future. The literature that relates to brand is extensive and therefore I have focused this review on the relevance and application of brand as a social construct. This chapter concludes with a review of the literature concerning disruptive innovation.

Tracing the evolution of the idea a university

The term 'university' derives from the Latin *universitas magistrorum et scholarium*, which translates as community of teachers and scholars. The first reference to university was in 1088 when the University of Bologna was founded (Da Wan, Sirat & Razak, 2015).

Newman's *Idea of a University* (1852) described the university as a multi-faceted and complex community of scholars concerned with "knowledge for its own sake" (p.104). Newman (1852) did not believe that teaching and research should be combined, rather he advocated for major intellectual discoveries to occur outside of the university. Marginson (2008), writing about the uses of the university, explained that Newman's (1852) university was primarily concerned with received knowledge, rather than new discovery, and the now more common notion of a research-

intensive university. Newman (1852) believed that a primary benefit of a university was to combine different fields of expertise. He wrote that the diverse fields of knowledge contributed to the “atmosphere of thought that every student breathed, even though the student might specialise in only one or two areas” (pp.76-77). It has been some 130 years since Newman died and yet, some of his propositions about the university appear to have survived. For example, his idea of placing seemingly diverse faculty members together under the umbrella of the university is a feature of the modern-day university campus (Bok, 2015; Marginson, 2008).

Nevertheless, much of what Newman advocated is no longer recognised as being part of the university. Research is undertaken at universities and universities are not cut-off from ordinary life; universities do engage with their communities; and importantly, universities do seek to ensure that their programmes are relevant to the workforce (Marginson, 2008). The former President of Harvard University, Derek Bok (2003), spoke of today’s universities as mass learning and research institutions that serve many purposes and preparing students for the workforce is one of the most important. Marginson (2008) noted that, “it is simply inconceivable that we could ignore the work-related outcomes of the university” (p.2).

Yet, even as Newman (1852) wrote about his idea of a teaching-only university, more than 50 years prior, Wilhelm von Humboldt (1809) had transformed the university system in Germany. Von Humboldt (1809) shared Newman’s (1852) philosophy that knowledge should be explored for its own sake and not for how it might be applied. However, one clear departure from Newman (1852) was that he promoted the idea of a teaching and research institution, an institution where academics both taught and were engaged in research. In the literature von Humboldt (1809) is acknowledged as advancing the purpose of a university to include innovation and subsequently establishing the research university as vital to modernisation. The teaching-research nexus has since become embedded in the modern understanding of a university in many countries. For example, in Australia, this relationship is required by the government in order for an institution to refer itself as a ‘university’ (NPHEAP, 2007;

Norton & Cherastidtham, 2014).

As early as 1876, with the founding of John Hopkins University, universities in the USA exemplified the teaching-research model advocated by von Humboldt (1809). This model was subsequently adopted by the new State universities, the land grant universities and leading private universities such as Harvard and Yale. Over time, von Humboldt's (1809) idea evolved and eventually his idea was relabelled as the 'American research university' (Bok, 2003; Kerr, 1963). For von Humboldt (1809) and his supporters, education should be an holistic experience, enriching the human spirit and not become simply a tool for industry to train its future workforce (Jaspers, 1961). Nearly 200 years later, it was Jürgen Habermas (1989), a German philosopher, neo-Marxist and sociologist that provided a summary that seems to succinctly encapsulate the position:

Institutions are forms of objective spirit. An institution remains capable of functioning only as long as it embodies in living form the idea inherent to it. As soon as the spirit leaves it, an institution rigidifies into something purely mechanical, as an organism without a soul decomposes into dead matter. (Habermas, 1989, p.101)

Despite his idealist position, Habermas (1989) highlighted "the transmission of technically-exploitable knowledge" (p.2) and ensuring that graduates were equipped with the skills necessary for a professional career as important attributes for the modern university. The issue that appeared to arise from his influential paper, was whether the demand for the university to prepare students for the workforce aligns with the idea of the university in the earlier, idealist understanding, or whether instead the university was transforming into an institution that was a function of the demands of industry and the professions.

Notwithstanding that the literature generally acknowledges that the idea of a university began with Newman's (1852) influential lectures, some universities in the UK were established in mediaeval England, with Oxford (est. 1096) and Cambridge (est. 1209) amongst the world's oldest. Prior to

1835, with the establishment of University College London, universities in the UK were founded on religious ideology and it wasn't until 1839 that degrees were awarded without some religious assessment (Rüegg, 2004).

In Australia, a country included in this research, the introduction of the university coincided with the arrival of European settlers in the 1800s. Perhaps not surprisingly, given Australia's colonial history, the model first adopted was British in character. The legislation to create the University of Sydney was passed in 1850 (University of Sydney Act) and this new institution would become the model for future universities in Australia – “an autonomous, professional, comprehensive, secular, public and commuter university” (Davis, 2013, para. 22). It was not until the mid-twentieth century that research became an intrinsic part of the Australian university mission, adopting principles and innovations from the American, UK and German universities. Ultimately, by government regulation, universities in Australia became required to be active in three broad areas of research in order to be called a university and this requirement remains in place today (NPHEAP, 2007; Norton & Cherastidham, 2014). Davis (2013), delivering the Monash University's Newman lecture, spoke about the Australian idea of a university and argued that a consequence of this universal research requirement was that there is very little differentiation between Australian universities. He contended that all Australian universities offer similar programmes, all undertake a broad spectrum of research, and there is minimal price competition for domestic students.

In China, another country that has been included in this study, the modern university is largely inspired by the American research university, and as early as 1930 Jiao Tong University referred to itself as the 'MIT of the East' (Mok, 2016). Although several institutions in China, notably Tianjin, Zhejiang and Jiao Tong all trace their histories to 1895, 1897 and 1895 respectively, the first university, Imperial University of Peking (now known as Peking University), was formally founded in 1898. Although this institution was based on the American research university model, the contrasting culture in China does present some notable differences, to be discussed later in this chapter under the heading *Critic and Conscience of*

Society. Prior to the establishment of the university, the highest level of institutional learning in China was the Guozijian. The Guozijian was formerly known as the Taixue, and the central schools of the Taixue were established as far back as the third century. The Guozijian was officially closed in 1905, and since then a modern school system (including universities) that was heavily influenced by American practises, was adopted (Michael & Gu, 2016; Mok, 2016).

It would appear that, notwithstanding whether the university is located in China, the USA, the UK or Australia, there are features that are common to our understanding of the university. Nearly 170 years after Newman's *Idea of a University (1852)* was published, Clark Kerr (1963), a former President of the University of California, wrote an essay about the many functions of the university. In this article he proposed that the idea of a university had evolved into a complex organisation that served many stakeholders. In his essay Kerr (1963) spoke to his idea of the university as being a "multiversity" (p.1). It was characterised by a desire to service and partner the community, industry and government; was increasingly concerned with marketing and reputation; and yet at the same time defined by its own institutional identity, an identity typically founded in history. Kerr (1963) wrote, "the university is so many things to so many people that it must, of necessity, be partially at war with itself" (Kerr, p.7). He also joked, "I have sometimes thought of it [the university] as a series of individual faculty entrepreneurs held together by a common grievance over parking" (p.15).

Kerr (1963) referred to the emerging phenomenon of universities proclaiming self-governance and self-determination, and yet at the same time these same universities were unwilling or unable to differentiate themselves from other institutions of higher education. He referred to this situation as an American system that, "helped to change the world and yet has changed less than most other systems in the world" (p.116).

However, since Kerr's essay two important and related developments have emerged. The first is globalisation. "In Kerr's time the horizon was

the nation, now it is the world” (Marginson, 2008, p.7). The second is the growing knowledge economy and Marginson (2008) concluded that, “the new knowledge that excited Kerr’s imagination has moved from being a large piece of the ‘idea of a university’ to the dominant motif for the whole. We have moved further from Newman’s teaching-only university” (p.7).

The historical perspective suggests that universities are organisations that are rooted in ideals and a purpose that is likely to be different from many traditional organisations. However, the history of the university is not simply about definition, it is also about function.

Loosely coupled organisations

Weick (1976), in his article that explored how educational organisations function, examined what he called the “loosely coupled” (p.1) nature of these organisations, highlighting the complex and independent components of universities. Parsons (1971) also described the university as a “loose kind of social organisation” (p.489) and highlighted the two sides of the university, distinguishing between the academic (for example, faculty, research, teaching programmes) and administrative (for example, student services, accommodation, marketing, fundraising) functions. He highlighted the tensions that arise between the different interests that these functions represent and concluded, “the academic horse is one of a very different colour” (p.495).

In a similar way to Parsons, Mayhew (1971) wrote about the changing face of university leadership, recognising that the university is moving towards an environment where there appears to be less academic freedom. He challenged the idea that all universities are founded on a traditional model of academia and claimed that they were intended to serve the public need, recognising that this need may change over time.

In a related article, Julius, Baldrige and Pfeffer (1989) discussed implementing change in the institution. Employing a similar sentiment to Weick (1976) and Parsons (1971), the writers asserted, “the key to being effective and the ability to make change begins first with an accurate assessment of the type of organisation in which you work. Universities and

colleges have a number of unique characteristics” (p. 114). The argument set forth by the authors claimed that the university “serves clients, has a highly professionalised staff, has unclear and contested goals, and is subject to external pressures” (p.115). The authors presented an image of an organisation that does not resemble the collegial community of scholars promoted by Newman, von Humboldt, Parsons, Kerr and others. Rather, their analysis claimed that the idea of a university is one where the decision-making process could be described as “decision flowing instead of decision-making. Decision making has a finality to it; decision flowing sounds like a never-ending process that must be continued in order to make outcomes really work” (p.116).

In tracing the evolution of the idea of a university, from Newman (1852), von Humboldt (1809) and Jaspers (1961), to Habermas (1989), Kerr (1963) and Marginson (2008), its principal role appears to be the preservation of the integrity of knowledge and, directly related to the preservation, the subsequent pursuit of “knowledge for its own sake” (Newman, 1852, p.104). Notwithstanding that the university has, over time, adopted a role that contributes to the preparation of students for the workforce, the idea of the university appears to be a place where intellectuals, whether teachers or students, are engaged in this pursuit without other priorities or hindrances. It is very clear from the literature and other sources that China does not fully reflect this conceptualisation (Tran, 2017; Xiong, 2017) and this will be discussed in more detail in the next section.

Critic and conscience of society and academic freedom

An analysis of the literature concerning the idea of a university would not be complete without a review of the literature relating to its role as a critic and conscience of society, and the importance to the university of academic freedom. According to Jones, Galvin and Woodhouse (2000), “academic freedom can only exist within an environment that encourages creativity, radical ideas and criticism of the status quo; and conversely, freedom is needed to express criticism” (p.1). In order for this environment to exist they contended that “universities have a responsibility towards

society, to work for what they view as the good of society, even at the cost of passing judgement on aspects of that society” (p.2).

The role of critic and conscience is closely intertwined with the concept of academic freedom, a feature of which is the teaching-research nexus: the ability for the academic to challenge established thinking and safely explore new ideas (O’Hear, 1998; Parsons, 1971). In his article concerning the idea of the university, and the university’s role as critic and conscience in a world that is constantly changing, O’Hear (1988) wrote that academic freedom should not be separated from the university’s role as critic and conscience of society and, is a value that is unique to the university. He stated that academic freedom is an extension of freedom of speech but “if it is to be distinguished at all from freedom of speech, it cannot be discussed outside the context of the university, for it is a value which pertains directly to the university” (p.13). In the same way, Jones, Galvin and Woodhouse (2000) concluded that the fundamental difference between the two notions is that an “extra degree of freedom of expression, above and beyond that associated with freedom of speech” (p.8) is required. Importantly, it appears that academic freedom is necessary when undertaking an investigation into the unknown (Parsons, 1971).

However, as Jones, Galvin and Woodhouse (2000) note, academic freedom is not without limits and, as a rule, in exercising it the academic should be guided by their area of expertise. Further, according to O’Hear (1998), academic freedom should not to be used as a shield behind which an academic can launch an attack on the character of another, plagiarise, or speak against an area or issue where the academic does not have recognised expertise.

It would appear that academic freedom is not a concept that is a feature of the idea of a university across the world. For example, in China, academics such as He (2002), Tran (2017), Xiong (2017 and Zhang (2017) have suggested that academic freedom is not the same as it is in other Western countries, including those selected for this study – the USA, the UK or Australia. The position in China appears to be complex with

social, political and historical influences impacting on the way universities function. Chinese economist He (2002), writing about academic freedom in China, claimed that the most difficult time for academics was during the Cultural Revolution (1966-1976), where the stated aim of the Communist Party was to preserve communist ideals. He (2002) said, “if one dared to criticise any policy or political leader, he or she could be prosecuted and sent to a labour camp or sentenced to life in prison or death” (p.26).

Acknowledging that since the cultural revolution there has been some moderation on the part of the Chinese government, he noted that the “method of controlling intellectuals and academic activities in China has moved from ‘hard and bloody’ tactics to ‘soft and hidden’ ones” (p.27), restricting academic freedom by encouraging cooperation with the government. The literature suggests that even in more recent times there is tension in China with respect to academic freedom. For example, Tran (2017), an academic in Hong Kong, writing about the lack of tolerance for academic freedom in China, stated, “universities will be closely scrutinised, professors will be evaluated and the Party will punish those lacking ideological firmness” (para. 1). In response to the subsequent criticism from academics in the West about the perceived censorship of academic ideas and opinions, the Chinese Government published an editorial stating that, while it respects academic freedom, China has the right to decide what can be published within its borders (Tran, 2017).

More generally, in recent decades opportunities to pursue financial goals appear to have placed increased pressure on the university’s role as critic and conscience of society. Academics and commentators, such as Blake (1988), Bok (2015), Craig (2015), Gruber (2014) and Marginson (2004) have suggested that these opportunities may result in universities pursuing external partnerships and referencing their performance against indices such as global institutional rankings. The authors cautioned that this approach will inevitably create an environment where external parties will seek to exercise a degree of censorship that could diminish academic freedom and dilute the fundamental role of critic and conscience of society.

In a similar way Giroux (2015), writing about how traditional university values were under threat, lamented that universities were being 'corporatised' and the reforms of successive governments had weakened academic freedoms. The concern expressed by scholars such as Blake (1988), Bok (2015), Giroux (2015), Gruber (2014) and Kelsey (1998) appears to be that, should universities embrace commercial strategies and align with private third-party interests to improve its market position, the role of critic and conscience, and with it, academic freedom, has the potential to be compromised, thus reshaping the idea of the university.

Despite the position in China, the literature indicates that in order for academic freedom to prosper universities must ensure that they create an environment where the role of critic and conscience is valued and protected, and not set aside as universities pursue entrepreneurial opportunities (Bok, 2003; Jones, Galvin & Woodhouse, 2000; O'Hear, 1988). In terms of the idea of the university, the role of critic and conscience of society and the concept of academic freedom appears to many theorists and commentators to be an essential value.

Globalisation and the knowledge economy

There is evidence that higher education institutions, like many other organisations, have been fundamentally changed by the process of globalisation. Globalisation is defined by the Organisation for Economic Co-operation and Development (OECD) as "the widening, deepening and speeding up of worldwide interconnectedness" (OECD 2008, p.53). For universities, this has resulted in institutions being more closely linked than ever before as they embrace internationalisation strategies (Marginson, 2004). According to the OECD (2016), the process of globalisation is likely to continue as national economies become even more interconnected. For example, the transfer of information and communications effectively ignores traditional national borders, encouraging more frequent movement of goods, services, and people around the world (Edelman, 2010).

Commentators such as Marginson (2008) have pointed out that globalisation has brought to universities benefits such as the mobility and

transferability of researchers, administrators and students. It is argued that in an interconnected world these networks contribute to greater efficiencies as innovation is shared and collaborations between tertiary institutions are pursued beyond national borders (OECD, 2008). For instance, universities are exploring cross-border markets in degree programmes, foreign branch campuses and joint ventures (Bok, 2015). In addition, it appears that universities are initiating strategies to improve their international reputations, notably global institutional rankings (to be discussed later in this chapter), strategies that have had significant effects on the behaviour of universities (Peters, 2017; Wedlin, 2014).

Norton (2012) observed in his research focused on the public and private benefits of education that, while research-intensive universities continue to be closely shaped by national policy settings, they are also closely shaped by global factors. Marginson (2008) referred to these institutions as “glo-na-cal” (p.8) institutions: global, national and local at the same time. According to Marginson (2008) “Newman’s idea of a university and Clark Kerr’s multiversity have become the Global Research University, or ‘GRU’” (p.8). The catalyst for the GRU appears to be connected to the increasing demands of the knowledge economy.

The knowledge economy is defined by Powell and Snellman (2004) as “production and services based on knowledge-intensive activities that contribute to an accelerated pace of technical and scientific advance, as well as rapid obsolescence” (p.199).

In an earlier commentary, Neave (1988) reported that universities had shifted from shaping social policy, to becoming influential in the building of the knowledge economy. In more recent times, it has been suggested that the knowledge economy appears to have had implications for the university, as society looks increasingly to them to provide the insights, innovations, and, ultimately, the human capital that fuels its growth (Bok, 2015). This subsequent renewed interest in universities as producers of knowledge has brought about new and increasing interest in controlling universities, particularly by government regulation (Bok, 2015; Jongbloed,

2003; Marginson, 2008).

Wedlin (2014), writing about why rankings should not be regarded as a performance indicator for the university, noted that the internet-based knowledge economy has expanded rapidly due to the growth of instantly available global knowledge. For example, Sadera (2014) wrote that massive online open courses (MOOCs) emerged as a response from universities to a perceived demand for knowledge from a vast digital marketplace, a market that may otherwise not have access to higher education programmes.

The adaption of diverse forms of communication in the provision of higher education is not a new phenomenon. Universities across the world have offered online programmes for many years and it is relatively common to see blended, or hybrid, learning models (Shumar & Wright, 2016). However, it would appear that with the innovations that have accompanied new online media, the opportunities for new providers to enter higher education has increased. The result is more competition and, for many universities, this has necessitated a review of their online learning strategies (Hollands & Tirthali, 2014). Studies by Hollands and Tirthali (2014) and Ghemawat (2014) about the impact of MOOCs, have reported that their emergence appears to be a response from higher education to embrace new technologies. The experience has, for both producers and consumers of MOOCs, been variable. This experience may be attributable to a confusion about the purpose of MOOCs. On one hand MOOCs can be seen as an attempt to improve social learning and, on the other hand, MOOCs are a commercial venture designed to generate revenue (Ghemawat, 2014; Liyanagunawardena, Adams, & Williams, 2013). Hollands and Tirthali (2014), and Shumar and Wright (2016), speculate that MOOCs will continue to develop and the more successful MOOCs will be those designed to enhance learning, with commercial opportunities less likely to be realised.

A further consideration in understanding the impact of the knowledge driven economy, is the idea that there should be a greater demand for

employees with a university education. In his book that explored the changing nature of higher education in the USA, Craig (2015) noted that the rise of the knowledge economy has seen higher education massively expanded, encouraging individuals to take on personal debt to pay for university credentials in the belief that they will be rewarded for their education by employers, once they enter the job market. Brown, Lauder and Ashton (2011) interviewed business leaders and policy-makers in China, India and Korea as well as those in America, Great Britain and Germany in order to test the assumption that an education led to a well-paid career. The results pointed to a far different reality, one where many graduates will become part of an over qualified workforce, competing with graduates from across the globe. In a similar study, by the Office for National Statistics in the UK (ONS, 2013), the findings suggested that, although university graduates are consistently more likely to be employed than other people without a degree, they are increasingly likely to be overqualified for the jobs that they do hold.

That a university education is only the means to a better job has been the subject of recent literature. Davidson (2017), a US academic, wrote about the influence of globalisation and the demands of the knowledge economy on the perceptions of employers. He concluded, “the goal of education is greater than workforce readiness. It’s world readiness” (p.15). Similarly, Andrews (2018), in an article concerning a trend towards degrees being seen as a ‘ticket to a job’, wrote that the university credential is a symbol of education and knowledge attainment, and not just a path to employment.

This approach is sometimes referred to as the intellectual model. The university is a place where intellectual engagement and academic freedom are encouraged and protected (O’Byrne & Bond, 2014).

In contrast to the intellectual model, the managerial model is one where the language of performance indicators, league tables, quality assurance processes, standardisation and employability is prevalent (Bok, 2003 & 2015; O’Byrne & Bond, 2014; Wedlin, 2014).

A third model is the consumerist model, described as the paradigm that is most concerned with students, parents and employers as 'customers'. In this model there is an increasing focus on student surveys, information/data, graduate employment rates and the concept of student satisfaction. In effect, the consumerist model is concerned with higher education as a means to a job (O'Byrne & Bond, 2014). In the consumerist model, "the most important indicator of quality is value for money as opposed to any measures around knowledge" (p.580).

This analysis describes the evolution of a university system that has moved well beyond the traditional idea of a university as described earlier in this chapter. Newman and von Humboldt spoke of the importance of "knowledge for its own sake" (Newman, 1852, p.104) and yet here the literature appears to suggest an emerging environment that, "champions skills over knowledge, functionalism over intellectualism, employability over critical self-reflection and knowledge for application" (O'Byrne & Bond, 2014, p.580).

The three models espoused by O'Byrne and Bond (2014) have the potential to be at war with one another, in much the same way as Kerr (1963) spoke of. Commentators and theorists such as Bok (2015), Craig (2015), Giroux (2015), O'Byrne and Bond (2014), and Marginson (2013) contend that the managerial model is regarded by university administrators as necessary in the face of the regulations and restrictions imposed upon the sector by governments, with their market-oriented policy settings becoming more influential over time. The emergence of the consumerist model appears to be gaining support in university planning, especially with the rapid growth of digital technologies and social media (Giroux, 2015). As a result, it is claimed by some writers that students now see themselves as customers as universities compete for their interests (Sharrock, 2013). O'Byrne and Bond (2014) concluded that university managers, academics and students each have an understanding about the purpose for the university that is in conflict with each other and a new approach may be required: "in place of this anarchic marketplace of

competing ideologies, a composite model which seeks to identify and satisfy the basic demands of each of the models – a triologue, if you like – is surely needed” (p.580).

Habermas (1989) cautioned us that the university can function “only as long as it embodies in living form the idea inherent to it” (p. 101). The challenge facing higher education today might be to consider seriously what this inherent idea might be. The literature suggests that the behaviour of universities has changed over time to reflect both the environment in which they operate and, to respond to developments, such as the evolving role of knowledge producer and provider of human capital. Many theorists and commentators have observed that on a superficial level managers, academics and students appear to offer conflicting visions of the idea of a university. O’Byrne and Bond’s (2014) recommendation, that universities consider a new model that satisfies the demands of its stakeholders, and resolves the apparent conflicts, seems compelling.

A key development in relation to universities, which this research puts front and centre of the changes impacting on the idea of a university, is the emergence of marketisation. Marketisation appears to have emerged, partly as a result of technology improvements and, partly as a result of national governments enacting legislation designed to make universities more efficient and effective (Dill, 2003; Jongbloed, 2003).

Marketisation

Jongbloed (2003) described marketisation as the process of changing state-owned, or state-managed enterprises into market-oriented, or market-led enterprises. In a similar way, American higher education researcher David Dill (2003), writing about the market for higher education in the United States, suggested that demands on public funding have led to the development of marketisation policies by governments around the world, ostensibly to create a framework to optimise the opportunities presented by the knowledge economy, but also to constrain their financial commitments.

It appears from a review of the literature that there are a number of rationales for public policies that introduce competitive markets to higher education systems. The desire for economic efficiency, understood as value-for-money, and recognising the growing costs of meeting the social demands for universal access to higher education, are often referred to by writers as the main drivers (Dill, 2003; Jongbloed, 2003). According to some researchers, marketisation policies are typically favoured by governments seeking to strengthen student choice, with a view to improving the quality and variety of the services offered by the providers of higher education (Jongbloed, 2003; Sevier, 2011). Brown (2009), presenting the results of his research into the opportunities and constraints of the market for higher education, reported that many government-led reform efforts seek to make higher education institutions do more for less by gradually reducing their funding per student. An important argument by governments to create competition in higher education appears to be to improve universities' capacity for generating social and economic benefits through innovation, the development of new student and customer-centric services and, new forms of program delivery (Dill, 2003). By encouraging competition and introducing various incentive programmes, marketisation policies could also be viewed as strategies by governments to improve efficiency in the higher education sector (Dill, 2003).

Norton (2012) argued that another key driver for the introduction of marketisation policies is the public/private benefit argument. Recognising that a university education conveys significant private benefits, a funding model that requires student contribution, which at the same time relieves pressure on the State, may be a desirable and, at times necessary outcome for many governments.

However, marketisation policies also have identified limitations, leading to the potential for market failures (Jongbloed, 2003). Market failures can arise for several reasons and in particular, in the era of rapid improvements in digital technologies, government intervention may be required to improve information-related causes (Jongbloed, 2003). In their research study that explored strategy and competition in the US higher

education market, Brewer, Gates and Goldman (2001) undertook a two-year investigation and concluded that, like any market, it can only function effectively if buyers (students) and sellers (universities) possess accurate and reliable information about the quality of the product. They noted that education is an experience good: quality is determined after it has been experienced. There is a considerable amount of literature that highlights the challenges of providing to potential consumers of higher education sufficient and appropriate information that allows for a properly functioning market (for example, Brown, 2009; Dill, 2003; Jongbloed, 2003). Jongbloed (2003) concluded his research by saying that government may attempt to intervene and try to set the conditions for that information to become available, however “this is the central problem for those who argue for greater marketisation of student education” (p.111).

According to some commentators, government intervention is required to remedy, or correct, potential market failures because a free market for education does not truly exist (Chapman, 2012; Jongbloed, 2003). The issue for government policy makers may be how they should correct market failures. A balance of regulation, monitoring instruments and quality assurance standards may be needed (Brown, 2009; Dill, 2003).

To restrict this analysis to the so-called Western university omits critical differences with respect to many countries’ universities, and in the case of this study, to China. As with academic freedom and the idea of the university, marketisation appears to have influenced universities in China in ways that vary, albeit nuanced, from the USA, the UK and Australia. In the West, the relatively recent surge in commercial activity is best understood as only the latest in a series of steps to acquire more resources, beginning with the use of aggressive marketing strategies to attract fee-paying students in the early twentieth century, and subsequently for government and foundation funding after World War II (Bok, 2003). However, in China, the marketisation process in education did not begin until after the Cultural Revolution in 1978 and, was in line with economic reform initiated by the central government at that time (Zhang, 2017). This represented a significant departure for universities in

China and it appears that, like universities in the West, they were being influenced by globalisation (Zhang, 2017). Also in the same way as universities in the West, the extent to which universities in China have been able to adopt marketisation strategies has been limited by government actions. Xiong (2012) concluded that the “marketisation of higher education in China is contextualised in a distinct bureaucracy-market duality” (p.318).

It appears that governments are facing the challenge of both supporting knowledge-driven development and the challenge of promoting quality, efficiency and equity in tertiary education. A review of the literature suggests that there are divergent views about where this tension is taking universities. On the one hand, as the knowledge economy grows universities play an important part in the discovery, dissemination and application of new knowledge. On the other, marketisation policies expose a university to greater market competition and, more detailed accountability for the way public funds are used. This in turn seems to have created pressure for universities to strengthen their management structures and become more entrepreneurial (Bok, 2003; Clark, 1998).

University responses to marketisation

As tabled previously, the traditional university mission is one that is typically founded on the advancement and transfer of knowledge, the nurturing of academic freedom, and its role as critic and conscience of society. However, this traditional mission has been under pressure as universities undertake more entrepreneurial activities. The growing influence of market forces on higher education has resulted in what Fairclough (1993) described as the “marketisation of academic discourse” (p.133). The concern from some academics appears to be that many universities have lost sight of their public mission in the pursuit of new revenues (Giroux, 2015; Newfield, 2008; Zemsky, Wegner & Massy, 2005). This shift has not been met with universal enthusiasm by the academic community, with many wishing for a return to the days when admission to a prestigious public university was ‘by invitation only’ and marketing was a subject that the university taught but did not practise

(Bok, 2003; Gruber, 2014).

The universities' motivations for pursuing entrepreneurial goals are complex but include seeking out commercial opportunities offered by the knowledge economy to counterbalance declines in State revenues (Bok, 2015; Craig, 2015; Giroux, 2015; Norton, 2012; Wedlin, 2014; Zhang, 2017). While acknowledging the commercial world and competitive markets that universities are participating in, Gruber (2014) suggested that academics across the world have criticised the idea that knowledge is for sale and that universities appear to be comfortable selling it. In the same way, Bok (2003) wrote that, "professors on the left complain about the 'commodification' of higher education, claiming that universities have turned into 'knowledge factories' where academic ideals are routinely compromised for the sake of money" (p.6).

In his study of five European universities, Clark (1998) reported that the higher learning landscape had changed in ways that neither institutions, nor governments, could manage. Clark (1998) observed: "in ever larger numbers innumerable types of university graduates, defined by speciality and degree level, expect university programmes to guarantee employability and career success" (p.6).

However, the university has been subject to changing environments and developments throughout its history and, the emergence of marketisation and marketisation policies may be just another pressure to be absorbed and responded to (Bok, 2003; Kerr, 1991). As early as in 1918, Veblen stated:

It is one of the unwritten, and commonly unspoken commonplaces lying at the root of modern academic policy that the various universities are competitors for the traffic of merchantable instruction in much the same way fashion as rival establishments in the retail trade compete for custom. (Veblen, 1918, p.67)

Nevertheless, it is the size and scope of commercial activity that has widened considerably in recent times, as universities sought to incorporate

opportunities to profit from academic discovery and innovation (Giroux, 2015; Marginson, 2008).

The university and college system in the USA is often described by higher education commentators as the primary example of a system where a true market for higher education exists (Bok, 2003; Craig, 2015; Napolitano, 2015). This may be attributable to a key difference between the policy settings in the USA and the rest of the world. In the USA governments sought to introduce policies to incentivise entrepreneurial activity, rather than regulate universities as governments have attempted to do in countries such as Australia and the UK (Bok, 2003; Marginson, 2013).

In China, while there have been moves towards adopting marketisation strategies, most notably in the pursuit of internationalisation goals, universities in China do not appear to have advanced as far along the entrepreneurial continuum as those in the West (Mok, 2017; Zhang, 2017). The evolving marketisation of higher education in China has been described as a “bureaucracy-market alliance” (Xiong, 2012, p.332) and this alliance is a hybrid model that reflects the particular political and cultural perspectives in that country (Zhang, 2017). Xiong (2012) claimed that universities in China are lagging behind the West when it comes to adopting marketisation strategies but they are still moving. The implication being that universities in China may eventually catch up and more closely resemble Western universities, the forces of globalisation being so strong.

Financial cutbacks have likely acted as an incentive for some universities to pursue profit-seeking strategies (Bok, 2003). However, the introduction of marketisation policies and incentives by government and industry appear to be a major influence, encouraging a spirit of private enterprise and entrepreneurship that has legitimatised these initiatives and activities (Jongbloed, 2003). Nevertheless, an important consideration in the context of this research is that across the world the rationale for, and implementation of, marketisation policies differs from system to system, and this has resulted in different market dynamics (Bok, 2003 & 2015; Davis & Craven, 2012; Norton, 2017; Wedlin, 2014).

In seeking to manage the forces of marketisation, approaches to branding indicate that universities must compete in relevant markets. Competitive theories suggest that in doing so they will be pushed toward differentiation (Di Maggio & Powell, 1983; Napoli, Dickinson, Beverland & Farrelly, 2013). However, the university is not a traditional commercial organisation and appears to be more concerned with increasing legitimacy and prestige, using funds raised to further their missions rather than profit returns to shareholders (Toma, 2012; Zemsky, Wegner & Massy, 2005). Accordingly, any differentiation appears to be minor variations on a theme (Chapleo, 2011; Mampaey, Huisman & Seeber, 2015). In the next section of this chapter the literature relating to the concepts of prestige and legitimacy are discussed.

Prestige and legitimacy

In the previous section, the modern higher education environment was described as being driven by the growing forces of marketisation, resulting in competition for funding, students and commercial revenues. Di Maggio and Powell (1983), and brand researchers such as Aaker (2014), Holt (2002), Keller and Lehmann (2004), and Napoli, Dickinson, Beverland and Farrelly (2013) suggest that institutions should seek to differentiate in order to effectively compete. However, in higher education this differentiation does not appear to occur in the traditional, commercial sense (Deephouse & Suchman, 2008; Donoghue, 2008; Toma, 2012; Wexler, 2016). Toma (2012) captures this sentiment, noting that, “in higher education there is some differentiation, but it is more at the surface or margins, with few institutions stepping away from the herd in meaningful ways, the pull of legitimacy being so powerful” (p.6). This may explain why universities differentiate in the pursuit of greater prestige, whereas commercial organisations differentiate to create a unique market segment in the pursuit of greater profit (Toma, 2012). In these circumstances, it appears that organisations are less interested in seeking efficiency than they are in legitimising themselves through reference to other organisations (Deephouse, 1999; Di Maggio & Powell, 1983).

There is considerable literature concerning organisational legitimacy

Dowling & Pfeffer, 1975; Meyer & Scott, 1983; Pfeffer, 1981; Suchman, 1995; Tregidga, Milne & Kearins, 2007). Meyer and Scott (1983) said, "legitimacy mainly refers to the adequacy of an organisation as theory. A completely legitimate organisation would be one about which no question could be raised" (p.201). In a later article, Suchman (1995) stated that legitimacy, "represents a reaction of observers to the organisation as they see it" (p. 574), implying that legitimacy is socially constructed. It is a perception that "reflects a congruence between the behaviours of the legitimated entity and the shared beliefs of some social group" (p. 547). Therefore, it appears that organisational legitimacy exists when the social structures from which organisations seek legitimacy are aligned (Dowling & Pfeffer, 1975; Pfeffer, 1981).

There are two streams of literature on organisational legitimacy: strategic and institutional. The strategic approach contends that organisations can at least partially control legitimacy. Organisations make decisions that can have the effect of changing or shaping their legitimacy through corporate actions. For example, strategic communications that aim to change perceptions of their activities and actions (Tregidga, Milne & Kearins, 2007). According to Dowling and Pfeffer (1975), the strategic approach is most often associated with actions to shape perceptions of issues that are of a social and environmental nature.

In contrast, according to Deephouse and Suchman (2008), the institutional approach is less able to be influenced by corporate actions. The institutional approach identifies that a "manager's decisions often are constrained by the same belief systems that determine audience reactions" (Suchman, 1995, p. 576). Therefore, an institutional approach has a focus that is not solely reliant on organisational communication strategies. Rather, it considers broader, situational contexts.

Deephouse and Suchman (2008) believed that "legitimacy alone is rarely enough to achieve much beyond the most mundane tasks" (p.66). The authors stated that legitimacy and prestige are interrelated, noting that while the organisation can make claims about itself based on perceived

status and reputation, “without legitimacy, prestige will be low, regardless of the organisation’s status or reputation” (p.66).

In relation to this study, researchers and commentators such as Toma (2012) and Donoghue (2008) have written extensively about how universities seek to shape perceptions of themselves by adopting a strategic approach to increasing legitimacy. Toma (2012) argued that, for the vast majority of universities, “their common goal is legitimacy through enhanced prestige - and with it access to greater resources, recognising that the most prestigious institutions also tend to be the wealthiest” (p.9). Blau (1964) defined individual prestige as: “an individual’s prestige depends largely upon...the prestige of those who accept him and socialise with him as an equal” (p. 133). In this sense, prestige is an aspirational term and, in the context of universities, obtaining greater prestige leads to increased legitimacy (Donoghue, 2008; Toma, 2012).

In their study that investigated the impact of image-related constructs on a student’s commitment to the university organisation, Sung and Yang (2008) found that many universities are investing in efforts to brand themselves as having a distinct set of values, the goal of which is to strengthen their prestige. They concluded, “the perception of how others view the university they belong to” (p.370) was the strongest determinant on how supportive students were about the university, and this was four times more influential than any other variable. This may represent a valuable insight for university communications, the implication being that, “universities’ efforts to directly communicate with and persuade prospective students may not be as effective as they are believed to be” (p.371). Temple (2011) summarised this position by emphasising the importance of prestige to the university. He stated, “everyone in higher education knows, and most people outside it know, that reputation is everything to universities” (p.115).

Toma (2008), in his study into why American colleges are so aggressively pursuing strategies for greater prestige, identified a number of factors that constituted prestige at universities: enrolling accomplished students;

retaining and graduating high performing students; the size of their endowment; and the value of sponsored research. He concluded that for many newer institutions, the application of these factors would mean that the distance to the “next level” (p.30) of perceived prestige is significant.

Marginson (2006) wrote that universities appear to be obsessed with strategies to increase prestige, potentially at the expense of other concerns for the student experience, such as avoiding poor teaching standards. Donoghue (2008) referred to this obsession as “prestige envy” (p.111), encouraging aspirational consumers to seek to acquire products and services that might enhance their social status. He remarked that those consumers who are conscious of prestige, “tend to want to assess it, put a price tag on it, brand it, and acquire it” (p.111). He lamented the situation where universities are rarely challenged about the assertions and promises that they are making in the pursuit of greater prestige.

Universities, in their pursuit of legitimacy through strategies to enhance prestige, appear to do so at the expense of a truly strategic approach to differentiation (Brewer, Gates & Goldman, 2001). In the view of some writers, universities tend to present as minor variations from each other, the mere appearance of differentiation is often sufficient to them, with the distinctiveness that institutions claim being more on the surface, focusing on ‘soft’ values such as location, and look and feel (Davis, 2013; Delmestri, Oberg & Drori, 2015; Donoghue, 2008).

As a consequence of this perceived ‘sameness’, the measures for performance in the higher education sector appears to some writers to be unsophisticated, with rankings and league tables adopted as proxies in a marketplace that is characterised by an information asymmetry (Brewer, Gates & Goldman, 2001; Wedlin, 2014). In more recent times this appears to have manifested in global institutional rankings (Marginson, 2007a).

Rankings

In the preceding section examples were provided to support the widely-held view that institutional legitimacy achieved through enhancing prestige

is not only an end, but also appears to involve similar means. In other words, institutions of different types are using roughly parallel strategies in positioning for prestige (Delmestri, Oberg & Drori, 2015; DiMaggio & Powell, 1983; Donoghue, 2008; Toma, 2012). This may represent a paradox, where standing out from the crowd in the traditional corporate sense risks being seen as an anomaly and, differentiation may not bring the legitimacy that the university community so desires. For example, Wexler (2016), writing about why there is a lack of differentiation between universities, stated, “in buying a product like higher education, you have to establish trust in the consumer of that product, I’m not necessarily sure that you do it by being radically different from every other college on the market” (Wexler, 2016, para. 28).

The measures for determining relative prestige in the higher education sector are viewed by commentators such as Marginson (2007b) as unsophisticated. These measures, referred to as global institutional rankings, have been the subject of many articles and studies, most of which discredit their methodology and mourn their perceived importance (for example, Hazelkorn, 2017; Marginson, 2007; Peters, 2017; Wedlin, 2014). Wedlin (2014) described rankings as the “identification of perceived attributes that are common to universities and then listing them in an order of global hierarchy” (p.71). Global university rankings have captured the attention of virtually every stakeholder in higher education and, in many ways have come to define university status and prestige (Gruber, 2014; Peters, 2017). Accordingly, rankings have influenced the behaviour of universities and as the university sector has become increasingly global, rankings are viewed by governments as a measure of how successful their country has been in engaging with the knowledge economy (Hazelkorn, 2017).

Rankings appear to have grown in importance due to the absence of any objective means of evaluating the relative performance of universities (Hazelkorn, 2017; Peters, 2017; Wedlin, 2014). Some researchers and commentators have suggested that these rankings are largely a measure of prestige and reputation and, the methodologies typically serve a circular

purpose, reinforcing perceptions without any real challenge (Marginson, 2007, 2007a, 2007b & 2013; Wedlin, 2014). In other words, the results are often predictable with only variations at the margins, often by those institutions that are more successful at playing the game.

Notwithstanding the flaws in their methodology, in effect rankings provide the basis for competition between universities in the global marketplace for students, staff and research (Wedlin, 2014). Wedlin (2014) stated, “in this market, rankings serve as consumer information tools, providing the market with necessary information to make informed choices of where to study, where to invest resources, or where to go to work” (p.72). She cautioned universities against adopting behaviours and strategies that aim to improve their ranking, the perception being that universities are more concerned with image than substance, and rankings alone “should not define success” (p.74).

Many writers have observed that the university does not differentiate in the same way as traditional organisations, citing aspirations for greater prestige as one of the primary reasons. However, the growth of the knowledge economy and the forces of marketisation appear to be influencing the behaviour of universities and, as they embrace commercial strategies, some writers have suggested that for an organisation to be successful it requires a strong, differentiated brand (Chapleo, 2011; Mampaey, Huisman & Seeber, 2015).

Brand

The use of the word brand has become more commonplace within the university (Bok, 2003; Chapleo, 2011; Mampaey, Huisman & Seeber, 2015; Mattin, 2017; Toma, 2012; Waeraas & Solbakk, 2008; Wexler, 2016). Amazon founder and Chief Executive Officer Jeff Bezos once remarked that, “branding is what people say about you when you’re not in the room” (Bezos quoted in Galbraith, 2016, p. 6). In this section I review the literature as it pertains to brand, examine the literature that focuses on the university brand and, discuss the implications from digital disruption.

What is brand?

A brand is far more than a name and logo. It is generally viewed as an evolving relationship, a relationship constructed through the experiences that a customer or group of customers has whenever they connect with that product or organisation (Aaker, 2014). Holt (2002) described brand as quite simply what people feel when they think about an institution, a company, organisation, person, product or thing. Aaker (2014) and Holt (2002 & 2003) agreed that successful branding makes loyal customers, advocates, even evangelists out of those who experience it and, therefore whether it be higher education or a traditional firm or product, the brand represents everything that the university, firm or product does and delivers.

Brand is an accumulation of experiences and company assertions, the driver of which is the brand identity (Aaker, 2014; Holt, 2002). In a study that investigated brand authenticity, Napoli, Dickinson, Beverland and Farrelly (2013) defined brand identity as what the company wants the brand to stand for, and Craig (2014), in his article that discussed service as a brand value, proposed that it is the consistent communication of characteristics, values, and attributes that clarify what this particular brand identity is, and is not. This includes logo, typeface, tagline, advertising, name and tone. Perhaps importantly in the context of this research, brand is important to the internal culture of an organisation and a well-articulated brand identity is something that everyone within the organisation can relate to and engage with (Galbraith, 2016). Holt (2002) speaks of brand identity as being something that can be readily understood by your customers and, it can set you apart from your competition.

This contrasts with brand image, which is described as that feeling or impression shaped by the sum total of people's experiences with, or exposure to that institution, company, organisation, person, product or thing (Aaker, 2014). In other words, brand *identity* is how the institution, company, organisation, person, product or thing presents itself, and brand *image* is how the consumer feels after experiencing it. For example, brand

identity speaks to where you want to be (your desire), whereas brand image speaks to who you are (others' views).

Brands are not born, they are made and it takes time to make, or construct them (Holt, 2002). According to Keller and Lehmann (2004) brands would exist even if no money was spent on advertising and promotion: customers would find some distinguishing characteristics (name, colour, shape) to identify products or services that had served them well and use them to simplify (make more efficient) future choices. Holt (2003) claimed that brands are constructed, comprising of 'markers' and these markers "have been filled with customer experiences, with advertisements, with films and sporting events, with magazines and newspaper articles that evaluate the brand, with conversations with friends and colleagues that mention the brand" (p. 2). These assertions (brand identity) and experiences (brand image) accumulate and gradually fill up the brand markers and associate meaning. Nakamoto and Shulz (2010) described this process in their study as the social construction of brand, an accumulation of experiences resulting in brand equity. This brand equity has the potential to present as a valuable intangible asset for an organisation, and therefore brand is an asset to be maintained, enhanced and even sold (Keller & Lehmann, 2004).

According to some writers, branding sets the direction for marketing activities and programs, providing guidance about what the brand should and should not do with its marketing (Aaker, 2014, Holt, 2002; Napoli, Dickinson, Beverland & Farrelly, 2013). This is known as brand positioning (Keller & Lehmann, 2004). Brand positioning involves the brand identity focusing on points of difference (differentiation), and the unique benefits that set each brand apart from its competitors to make the brand more desirable and relevant to a given target market (Keller & Lehmann, 2004). According to Aaker (2014) and Holt (2002) it is these points of differentiation that customers remember about a brand and this shapes brand image.

Academics such as Aaker (2014) and Holt (2002) stated that corporate strategy will function most effectively when it is aligned with branding strategies. This will ensure that the company presents a unified direction, both internally and externally. Galbraith (2016) suggested that a key responsibility for senior leadership must be to ensure that everyone in the organisation is properly aligned with the brand values. Galbraith concludes her article by stating that, internally, this challenging task of aligning and managing brand cannot be left to, or even controlled successfully, by marketing departments alone.

There arises an issue for management when there is a gap, or variance, between brand identity and brand image (Temporal, 2002). This gap creates a blurred, ambiguous, confused or contested brand positioning. In his study that explored how brands evolve, Temporal (2002) suggested that where brand positioning is confused, or blurred, the brand may need to be repositioned: reviewing and redefining the brand identity in the context of how the brand is being received or experienced (brand image). He noted that this might be due to a number of reasons, including a change in the needs and wants of the target audience, unclear brand communications, a disruptive event or, a shift in strategic direction.

However, brands have also been investigated as carriers of meaning (Booth & Matic, 201; Nakamoto & Shulz, 2010). For the consumer, a brand brings to mind a range of associations (Aaker, 2014; Holt, 2002). The marketer's responsibility is to seek to manage and shape these associations through product positioning, particularly relative to competitors (Keller & Lehmann, 2004). According to Nakamoto and Shulz (2010), consumer understanding also involves "subjective, attaching associations such as image, self-relevance, and affective responses, for example love and joy evoked by Christmas presents. These associations, in addition to the functional attributes, are critical to a brand's success" (p.3).

Brand as a social construct

In the previous section the brand was described as a social construct (Nakamoto & Shulz, 2010), the sum of the assertions made about the company or product (brand identity), and customer experiences (brand image). The observations from the studies by Nakamoto and Shulz (2010), and Booth and Matic (2011), are not entirely new, and there is literature that suggests that at least some aspects of brand meaning are subjective. For example, brand personality and brand relationships are “constructs that reside not in the product but in the mind of the consumer” (Nakamoto & Shulz, 2010, p.1).

From a marketing perspective, firms manufacture products and seek to create (using various communication media) a variety of social facts relating to them (Booth & Matic, 2011; Nakamoto & Shulz, 2010). The reason for the existence of a brand is “to serve as a point of focus for the marketing of a product” (Nakamoto & Shulz, 2010, p.3). However, when a brand is introduced, none of this knowledge is shared by consumers; the creation of brands and the association of social facts with them “are linked to consumer learning, and is thus socially constructed” (Nakamoto & Shulz, 2010, p.3).

In a similar way, marketing requires that brands should be positioned to best address consumer preferences (Keller & Lehmann, 2004). Preference formation suggests that firms first educate consumers about the meaning of their brand identity (attaching social facts) and second, persuade consumers to prefer them. In other words, it is the firm that proposes new facts about its brand (brand identity) and the consumers’ perceptions of a product are, in a sense, negotiated through experience (brand image). Beyond the engagement between the brand and the consumer, the social context of experience is also important (Booth & Matic, 2011). For example, Craig (2014) claimed that word-of-mouth is an important element of consumers’ interactions with products, particularly as the emergence of social media has increased.

According to the study by Hirschman et al. (1998), products are given meaning “by texts such as television shows and commercials that ‘coat’ the physical product with symbolic content” (p.40). It then follows that the consumer may attribute meanings to the brand through the stories they share with each other. Brown, Kozinets and Sherry (2003), discussed how brand managers could learn from past experiences and identified that brand stories provide consumers with an environment for group affirmation and identity. In a similar way, Tynan, McKechnie and Chhuon (2010) introduced the idea of brand co-creation, reflecting the increasing influence of consumers on the construction of brand identity. This study is consistent with Schembri’s (2009) view that, “effectively, consumers consuming co-construct the brand experience” (p.309).

There is literature that suggests that the idea that consumers co-construct the brand experience may have been accentuated in recent times by the emergence of *digital disruption*. Digital disruption involves changes enabled by digital technologies that occur at a pace and magnitude that disrupt established ways of value creation, a concept to be discussed later in this chapter (Bradley & O’Toole, 2016; Edelman, 2010; Garman, 2014; Kenney, Rouvinen & Zysman, 2014; Watson, 2016).

In the context of this research, how the concept of brand is applied to the unique type of organisation that is the university may be pertinent. It appears that the literature relating to university branding is growing, perhaps in response to universities seeking to adopt more commercial approaches to compete for students, staff and research funding (Wexler, 2016).

The university brand

University branding has grown in importance over recent decades as institutions embrace and respond to marketisation. However, the idea that a university has a brand is not a new concept. Clark (1972) introduced the concept of the university’s *saga*, defined by him as a shared belief that binds people to a common purpose. The description of the saga used

language normally associated with brand. For example, Clark (1972) stated that the university must present a strong vision; define and articulate service standards as ideals for the organisation as a whole; and instil a belief in its people that service is not just the responsibility of non-academic staff, but rather an organisation-wide commitment. Importantly, the saga takes time to build and develop, in much the same way as Holt (2003) described in the filling up of the various “brand markers” (p.2). If a saga is not rooted within its members as a fundamental belief it is not likely to survive: it is a *temporary saga* (Clark, 1972). This may be an issue for universities, as they comprise faculties and schools that may have different cultures, values and ideals that do not necessarily align with each other (Bourdieu, 1993).

For some academics, the idea that universities should engage in marketing and commercial activities is contrary to the purpose for which they were intended. There is a fear that marketers will engage conventional branding processes and make unsubstantiated claims about a university’s brand, which will in turn impact on reputation (Gingras, 2009). In a similar way, Temple (2011) wrote, “branding activity in higher education is misconceived, because (as far as I could tell) it fails to understand what it is that universities do and how they do it” (p. 113). He compared branding in a university with conventional brand approaches to soft drink and stated:

In what sense, really, can a fizzy drink be said to embody values? But are university brands like this? No, of course they are not: they do carry identities and do embody values. But some people, including some in universities, seem intent on devaluing them, by treating them as if they were soft drinks. (p.115)

This may mean that there is the risk of trivialising what higher education does (Donoghue, 2008). In contrast, branding may help higher education institutions to rediscover who they are, to capture the distinctive mission, aspirations, and strengths of an institution and appeal to the motivations and interests of the rapidly changing marketplaces that universities engage with (Belanger, Mount & Wilson, 2002; Clark, 1988; Jevons, 2006)

Research into university branding is limited, but growing. The study by Waeraas and Solbakk (2008) reported that as universities seek to compete in national and international markets, they embrace commercial concepts such as branding and, as a consequence, begin to ask questions about “what are we? As well as what do we want to be? And what do we want to stand for?” (p. 450). However Chapleo (2011), in his exploratory study of university brands in the UK, spoke to the complexity of branding in the higher education context and questioned the application of commercial branding approaches, referring to them as too simplistic to apply to a complex organisation like a university. He noted that universities are large, complex organisations that often offer a broad, and quite similar range of courses and services that makes identifying points of distinctiveness upon which to build a brand difficult.

In sectors characterised by isomorphism, defined by DiMaggio and Powell (1983) as “the process of homogenisation” (p.149), the preference of participants is to develop their brand position within a frame (Deephouse, 1999). The parameters of the frame are created by reference to others in the same sector - and thus the path to greater legitimacy is determined. Deephouse (1999) highlighted that, “by differentiating, firms reduce competition. By conforming, firms demonstrate their legitimacy” (p.147).

Mampaey, Huisman and Seeber (2015) studied brands in Flemish higher education institutions. The results from their study support Deephouse’s (1999) assertion that organisations can be different within the boundaries of adhering to the same sets of values; that is, within a frame. The authors concluded that universities were more similar than they were distinctive. According to Mampaey, Huisman and Seeber (2015), universities were able to counter their apparent conformity by communicating their own organisation-specific meanings (or interpretations) of widespread sector values, such as ‘global’, ‘excellence’ and ‘world-class’, thereby differentiating them from their competitors - albeit at the edges.

In certain sectors where legitimacy was as much of a concern as true differentiation, it may be preferable for the organisation to brand within a

frame: some differentiation but not becoming an “outlier” (Wexler, 2016, p.1) that is unrecognisable from every other participant in the market (Deephouse, 1999). According to Deephouse (1999) the university should attempt to find “the balance point where a firm is as differentiated as legitimately possible” (p.162). However, the emergence of digital disruption, to be discussed in the next section, may render this approach difficult in the future.

Digital Disruption

Digital disruption refers to the changes enabled by digital technologies that occur at a pace and magnitude that disrupt established ways of value creation, social interactions, doing business, and more generally our way of thinking (Edelman, 2010; Garman, 2014). The name itself is potentially misleading in that, while the term emerged at roughly the same time, digital disruption is not *disruptive innovation* (Christensen & Bower, 1995), a topic to be discussed in the next section of this chapter. Rather it is considered a potential catalyst, or an enabler, that can lead to disruptive innovation (Vermeulen, 2017). However, Garman (2014) cautioned that it is a mistake to see the digital revolution as a function of technology, rather it is one of business and social evolution:

Digital disruption doesn't fall into the neat pessimism or optimism so emblematic of our times but does say forcefully that we are all on uncertain ground and need to reconfigure our ways of doing and being in media making, media managing and in education. (Garman, 2014, p.1)

A review of the limited literature available on this topic suggests that digital disruption demands a higher level of transparency and authenticity from the brand (Mattin, 2017; Vermeulen, 2017). The powerful innovations in computing and telecommunications, notably broadband, mobile and e-commerce systems have made it possible to buy and sell in new ways. They have also made it possible to communicate differently with each other, evaluate the promises and delivery of products more effectively, increase automation and, gather and analyse large amounts of data quickly (Watson, 2016). This is allowing the customer to drive innovation and, with this new-found power, the customer now expects immediate,

convenient and smarter services (Garman, 2014; Watson, 2016). It appears that a consequence of digital disruption is that brand image is becoming more influential in shaping brand experience than brand identity (Bradley & O'Toole, 2016; Kenney, Rouvinen & Zysman, 2014; Vermeulen, 2017).

The same principle applies to higher education and, a consumer's expectations regarding immediacy and convenience from other corporations has become an expectation of universities (Galbraith, 2016). The rationale is that the university, like any other organisation, is now a "glass box" (Mattin, 2017, para. 7) where external stakeholders can more easily see inside and examine its inner workings. However, while universities appear to have been slow to understand the impact that digital interactions may have on brand experience, according to some writers they have been effective at enabling the digital platforms and tools necessary to expand their education services (Kerr & Kelly, 2017; Sadera, 2014).

In relation to how brands should adapt to digital disruption, the study by Limba, Kiskis and Jurkute (2014) highlighted that the online brand experience is not simply a direct translation from the offline experience. Earlier, Booth and Matic (2011) asserted that this distinction is important as the online environment provides consumers with the ability to connect, design, and configure products to their unique personal preferences:

The 'nobodies' of the past are now the new 'somebodies' demanding the attention of communication professionals who seek continuous engagement with targeted consumers throughout the various channels of the social web. (p.184)

There is strong support for the view that digital disruption may require a paradigm shift for brands, where brand experience is determined not by the organisation's assertions (brand identity) but by consumer experience (brand image), resulting in an understanding of brand which is not shaped by the firm or product but by the consumer (Bradley & O'Toole, 2016; Edelman, 2010; Kenney, Rouvinen & Zysman, 2014; Mattin, 2017; Vermeulen, 2017).

Earlier in this section it was highlighted that digital disruption is not disruptive innovation, rather it is a catalyst that may lead to disruptive innovation (Vermeulen, 2017). Disruptive innovation was first espoused by Clayton Christensen in his seminal article written with Joseph Bower (Christensen & Bower, 1995) and since its publication this concept has been the subject of many articles and research studies (for example, Christensen, Raynor & McDonald, 2015; Gandi, 2016; Markides & Geroski, 2005).

Disruptive innovation

Christensen (1997), a Harvard Business School professor, defined disruptive innovation as having occurred when a new product targets a market that previously could not be served (a new-market disruption) or it offers a simpler, cheaper or more convenient alternative to an existing product (a low-end disruption). In other words, the main objective of disruptive innovators is not to deliver the best performance, product or service to current consumers. Rather, it is to deliver products or services to a market by the introduction of other, generally unforeseen, perhaps even unanticipated benefits (Christensen, 1997; Markides & Geroski, 2005).

More recently, Christensen, Raynor and McDonald (2015) highlighted that disruptive innovation is a process where a “smaller company with fewer resources is able to successfully challenge more established incumbent businesses” (p.3). Specifically, as incumbents focus on improving their products and services for their existing customers, they may ignore the needs of others in the segment. The entrants that prove disruptive start “by successfully targeting those overlooked segments” (p.3) and these new entrants then grow by delivering “more suitable functionality, typically at a lower price” (p.3). Christensen, Raynor and McDonald (2015) profiled a disruptor as one that is entrepreneurial and adopts the attitude where “no one company is so essential that it can't be replaced and, no single business model or sector are off-limits to a raw burst of change” (p.47).

The contention then is that, as incumbents continue with their strategies to maximise profits from their established market segments, they are inclined not to respond aggressively to the new entrants (Shirky, 2012). This allows the new entrants to expand their market share, delivering performance/service that satisfies the demands of the incumbents' mainstream customers, while maintaining the advantages that characterised their earlier approaches (Christensen, Raynor & McDonald, 2015). Disruption occurs "when the performance trajectories of the disruptive technology intersect with that of the performance in the mainstream market" (p.16). In other words, when mainstream customers start consuming the new entrants' products and services in volume, moving from specialised/niche to mass-market, disruption is considered to have occurred (Markides & Geroski, 2005).

As Christensen's (1997) concept has grown in popularity, there is also considerable conjecture in the literature about what disruptive innovation is, and is not. Gandi (2016) provided a perspective on the use and misuse of Christensen's disruption innovation, claiming that the disruptor, through a simpler or cheaper product, service, business model or technological innovation takes over the low-end of the margin and moves upstream. He suggested that by the time the established players in the market realise what has happened, the disruptor has assumed a significant share of the market and is now capable of competing directly with the established market leaders.

By way of an example, smartphones are understood as disruptive to the personal computer industry. However, there are other industries that have been disrupted by smartphones (Gandi, 2016). The market for flashlights was substantially impacted by the launch of this product. The cheaper watch market has similarly been affected by smartphones. With continued advancements in technology the disruption is continuing (Christensen, Raynor & McDonald, 2015; Gandi, 2016).

However, in contrast, some apparent examples of disruption may not be disrupters at all, at least when the conditions for disruptive innovation are

applied. For example, Uber, the transportation company “whose mobile application connects customers who need transport with a corresponding driver who is willing to provide it” (p. 5), may not be considered as a disruptive innovation. It appears that Uber is providing a different interpretation of the taxi business, it is not disrupting the taxi business (Christensen, Raynor & McDonald, 2015).

Christensen, Raynor and McDonald (2015) observe that “there arises an intriguing anomaly when studying disruptive innovation: the identification of industries that have resisted the forces of disruption. Higher education is one of these” (p.15). Given that both incumbents and new entrants to higher education are seemingly embracing similar, if not identical strategies, that incumbents are able to sustain their market positions is perhaps not unexpected. According to Christensen Raynor and McDonald (2015) “what has been missing, until relatively recently, is experimentation with new models that successfully appeal to today’s non-consumers of higher education” (p.16).

Christensen Raynor and McDonald (2015) pose the question: “is there a novel technology or business model that allows new entrants to move up-market without emulating the incumbents’ high costs” (p.16). In other words, to follow a disruptive path. According to the authors, the answer seems to be yes, and the enabling innovation is online learning, which is becoming broadly available. Recent examples include the existence of exclusively online education providers and the emergence of MOOCs (Sharrock, 2015), discussed earlier in this chapter.

Conclusion

This chapter has identified and discussed common themes and patterns of research on brand, the idea of a university, marketisation and disruptive innovation. The review of the literature presents us with a university organisation that is unique in terms of its purpose and its decision-making processes. The behaviour of the university has changed over time to reflect both the environment in which it operates, and to respond to developments, such as marketisation, the role of knowledge producer, and

provider of human capital. And yet, in the face of considerable change and increasing external influence and scrutiny, universities, with the notable exception of China, remain committed to the ideals of academic freedom, the pursuit of knowledge and their role as the critic and conscience of society.

Kerr (1963) described the world of the university as one steeped in history and tradition. Against this tradition, changes and developments happen. Despite the sense that universities maintain a continuing tradition, the tertiary education systems they inhabit may change dramatically when government policy changes, or new technologies arise, or new market conditions emerge (Jongbloed, 2003). In response to such developments, institutions may need to break with aspects of their tradition and reinvent aspects of the way they work (Zemsky, Wegner & Massy, 2005).

It appears that the great strategic change in higher education across institutions, both public and private, has been toward a more revenue-driven, market-responsive approach – a culture of professional managers responding in more entrepreneurial ways to external opportunities and to those increasingly viewed by universities as clients (Bok, 2003; O’Byrne & Bond, 2014; Sharrock, 2013). Institutions thus need to manage greater complexity, while competing more directly and intensely, whether for students or resources. In doing so, they appear to see added prestige as an important advantage, and arguably are doing what they can to secure it (Donoghue, 2008; Toma, 2012).

Scholars such as Bok (2003), DiMaggio and Powell (1983), Donoghue (2008), Toma (2012) and Wexler (2016) claim that higher education institutions must also present that they are similar to other institutions to enhance their legitimacy, particularly those they aspire to be more like. Brand development in the university appears to have mirrored this approach, with universities across the globe seemingly differentiating at the edges and seeking legitimacy without presenting as an “outlier” (Wexler, 2016, p.1). The literature suggests that aligning the university brand to one regarded as having greater prestige is a common strategy in

order to move into a more promising prestige segment (Donoghue, 2008; Toma, 2012), or in more recent times, climb the global university rankings (Hazelkorn, 2017; Marginson, 2007; Peters, 2017; Wedlin, 2014).

With the relatively recent emergence of the commercial marketing concept of digital disruption, the ability for a university to rely on moving to the 'next level' through the adoption of a seemingly similar and undifferentiated set of values and strategies, is likely to be placed under closer scrutiny (Edelman, 2010; Garman, 2014; Mattin, 2017). In other words, there is a risk that there will emerge a gap between the university's brand identity and the brand image. The literature suggests that in these circumstances the university may need to reposition its brand identity (Temporal, 2002).

However, there appears to be a gap in the literature as it relates to the application of disruptive innovation to the university, how they might respond to disruption and the subsequent effect on the construction of the university's brand. This research explores how the university brand might evolve in those circumstances.

The next chapter describes the theoretical framework and methodology that underpinned this research, together with an outline of the data collection and analysis methods used in the study.

Chapter 4 – Methodology

Introduction

This chapter outlines the theoretical framework, methodology and method used to conduct this research project. It begins by detailing the research questions at the centre of this investigation. The chapter then provides an explanation of the social constructionist epistemology that underpins the study, the methodological rationale that determined the research design and the interpretive paradigm that shaped my social inquiry. The next part of the chapter discusses the research method. Here I outline the research design; the research sample; the rationale for, and the advantages of the semi-structured interview; and, issues of translation. This section is followed by an outline of the data analysis and an illustration of the coding steps used in the thematic data analysis. The final part of the chapter describes my personal reflection on the ways in which my own values, interests, and experiences have shaped the research process.

The research questions

The overarching objective of this study was to explore how the challenges of constructing a brand in the twenty-first century is impacting on the idea of a university. The study used a social constructionist lens to explore how the participants, each of whom was employed in a senior role in a university, made sense of the issues and challenges confronting universities as they constructed their brand identities.

It is evident from the review of previous research (see Chapter 3) on brand, marketisation, the idea of a university and from the more recent field of disruptive innovation, that there is a research gap in terms of understanding the intersection between the idea of a university, brand and how universities might respond to the challenges of disruptive innovation. To achieve the objective the following research questions were developed:

Research Question 1. What are the strategic challenges for universities in constructing a brand in the twenty-first century?

Research Question 2. What are the internal challenges that universities

experience as they construct their brand identity?

Research Question 3. What is the role of leadership as universities construct their brand identity in the future?

In the next section I outline the theoretical framework that was the foundation for the research into these questions.

Social Constructionism

The assumptions that guided my thinking as the researcher in this thesis were informed by a social constructionist perspective: where meaning and experience are produced and reproduced through social interactions, rather than within individuals (Berger & Luckmann, 1991; Crotty, 1998). Social constructionists contend that social facts are not objective. Instead, they are the result of repeated sense-making, beliefs, perceptions and interpretation that individuals use to understand how they should act and respond in their social contexts (Andrews, 2012; Chell, 2000).

At its essence, in attempting to understand the world, social constructionists view knowledge as created, as opposed to discovered (Andrews, 2012; Berger & Luckmann, 1991). Further, Burr (2003) claimed that the 'social' in social constructionism is about the form or nature of meaning generation and not about the type of object that has meaning. For social constructionists there is no absolute truth - knowledge and truth exists relative to culture, society and historical context (Andrews, 2012; Berger & Luckmann, 1991; Hammersley, 1992).

Berger and Luckmann (1966) viewed human behaviour to be determined by the context, the environment or the situation. What people perceive to be reality, or the most appropriate way to do things in a particular context/situation, is produced and repeated through an amalgamation of individual actions, environmental factors and social forces/influences over time. The authors suggested that people perceive and interpret the behaviour of others in the various social contexts and situations that they are engaged with. They referred to these shared experiences that have shaped their perspectives as "historicity" (p.19). According to Andrews

(2012), this attention on everyday exchanges between people and how they use language to create their understanding of reality is the emphasis for social constructionists.

This is not to say that people do not continue to make and express individual choices and exercise independent thought. Rather, social constructionists suggest that they may also respond to social, environmental and contextual influences (Berger & Luckmann, 1966). In other words, people are still able to express their own distinct personality in a social setting, but they tend to consult with the wider social group to understand the accepted, or most appropriate way of doing things. Berger and Luckmann (1966) described this inclination for people to collectively agree about the 'best' or the 'normal way' of doing things in that particular context as habit forming, or 'habituation'. This process causes behaviours and acceptable conduct to become normalised within certain social contexts and it then becomes the usual part of the way things are (Berger & Luckmann, 1966). As a consequence, people are less likely to be mindful about what is required to do in a given situation or context because the habit has been constructed and reinforced over time.

Social constructionist studies are concerned with how people ascribe and attribute meaning to their world. Hansen (2010) wrote that social constructionists seek to understand, "the ways in which issues, problems, claims, and definitions emerge through social processes of communication, enter into and are elaborated in public arenas" (p. 187). They also subscribe to the view that a completely indeterminate perspective on the world does not occur, as people come from diverse backgrounds and therefore see the world in different ways, through their own lens (Best, 1987; Kincheloe, 2005; Lindlof & Taylor, 2011).

In summary, the literature suggests that social constructionists view society as existing both as an objective and subjective reality. As frequently repeated action forms into an easily reproduced and repeated pattern, the meaning of the formed habit becomes embedded as a routine, creating a general accumulation of knowledge – a construction. This

subjective knowledge is subsequently institutionalised by society such that future generations experience this form of knowledge as objective – a cumulative effect.

In thinking about how to apply a social constructionist lens it is important to explain how social constructionism is relevant to this research. Social constructionism is the lens by which I made meaning from the interview data obtained from the participants. It informed my data analysis, the presentation of findings, the discussion and the conclusion.

In the next section I outline the methodology that underpins the research into the research questions.

Methodology

The literature refers to methodology as “a way of thinking about and studying social phenomena” (Corbin & Strauss, 2008, p. 1). Quite simply, when thinking about methodology in the context of this thesis, I am primarily concerned with how to undertake this research (Taylor & Bogdan, 1998).

According to Roller and Lavrakas (2015):

Social constructionism and qualitative research is a natural marriage, wedded by a mutual respect for the complexities of the human experience and the idea that any one facet of someone’s life (and the researcher’s role in exploring this life) intertwines with (contributes to) some other facet. (p.1)

These authors claimed that as people live their lives they “can’t be anything other than intricately involved together in the construction of our worlds” (p.1).

This study aims to explore how the participants construct their universities brand identities; to understand the strategic challenges that universities may face as they construct their brands in the twenty-first century; investigate whether there are internal challenges for institutions as they construct their brands; and, explore the role that leadership plays as they

construct their brands in the future. Accordingly, this is a study founded in qualitative methodology: where investigation, exploration and interpretation of meaning are necessary in order for the researcher to make sense of the data collected (Prasad & Prasad, 2002; Sarantakos, 2005).

Qualitative research

Qualitative research focuses upon the non-quantification of data collection and analysis (Prasad & Prasad, 2002). Denzin and Lincoln (2003) explained, “qualitative research is a situated activity that locates the observer in the world...[and] involves an interpretive, naturalistic approach to the world” (p.4). The authors also stated, “qualitative researchers study things in their natural settings, attempting to make sense of, or to interpret, phenomena in terms of the meanings people bring to them” (pp.4-5). The term *qualitative* as defined by Denzin and Lincoln (2000) focuses on “the qualities of entities and on processes and meanings that are not experimentally examined or measured” (p. 8).

Qualitative research engages us by exploring the contexts of everyday life; the understandings, experiences and perceptions of the research participants; the ways that social processes, institutions, and relationships work; and, the significance of the meanings they generate (Charmaz, 2006; Denzin & Lincoln, 2005; Sarantakos, 2005). Denzin and Lincoln (2005) claimed that it is possible to do all of this qualitatively, by using methodologies that provides context to richness, depth, subtlety, and complexity.

Qualitative writing differs from quantitative writing because the sense of argument develops through the whole process of data collection and analysis (Richardson & St. Pierre 2005). Importantly, qualitative writing involves an unfolding story, an interactive process in which the researcher untangles and gradually makes sense, not only of the data, but of the total experience of which the researcher has a presence and a role (Denzin & Lincoln, 2005). It is therefore important for the researcher to

reflect on his/her role in the research, understanding that a researcher's own experiences has the potential to influence the collection and analysis of the data (Alvesson & Skoldberg, 2000; Corbin & Strauss, 2008; Finlay, 2002). The voice of the researcher, as both the writer and the interpreter, is not only a major part of the thesis, it also needs to be evident for the meaning to become clear (Richardson & St. Pierre 2005).

Accordingly, the written report takes the form of a complex story in which the voice of the researcher and his or her image of others is interwoven. Therefore, "unlike quantitative work that can carry its meaning in its tables and summaries, qualitative work carries its meaning in its entire text, its meaning is in the reading" (Richardson & St. Pierre 2005, pp. 959-60).

The interpretive approach

This research adopts an interpretive approach to the study of how the participants made meaning from the challenges of constructing and communicating brand in universities. Schwandt (2003) claimed that the interpretive approach is an appropriate approach for social researchers, because the concern is to understand individuals' subjective experiences and, how participants make meaning out of a situation, environment or context. This requires an understanding of the action, which in turn, requires an interpretation of that action, in order to find meaning in a particular social interaction (Schwandt, 2003). Van der Veer and Valsiner (1991) claimed that, according to the interpretive approach, "the meaning people attribute to things in the world around them is not only constructed but contingent" (p.149). Put another way, the meaning constructed depends on contextual and situational features, such as the particular history, place, and culture that people may convey in/to the act of meaning-making.

However, Denzin and Lincoln (2003) caution that interpretations "are constructed...the interpretive practice of making sense of one's findings is both artistic and political...there is no single interpretive truth" (p. 37). Therefore, the analysis in this study reflects my attempt to make sense, and draw meaning, from the interview data that I collected from the

participants. My objective was to interpret how a participant's role, cultural perspective, experience and attitude about the future influenced their construction of the university's brand identity and the idea of a university.

The next section describes the research design, beginning with the rationale for using interviews to collect the data. According to Creswell and Creswell (2018) the function of the research design is to ensure that the evidence obtained enables the researcher to effectively respond to the research questions, logically and as clearly as possible.

Interviews in social constructionist research

Fontana and Frey (2003) and Gill et al. (2008) wrote that in order to gather information and create a data set from which the researcher can undertake an analysis, an increasingly used method is the conducting of interviews. Denzin (2003) claimed that the use of interviews to gather information has led some researchers to observe that we live in an "interview society" (p.141). This is important because it emphasises social context and meaning (Guba & Lincoln, 1994). From a social constructionist perspective, the interview is particularly relevant as a way of gathering data because it can guide the researcher in understanding an individual's experience (Holstein & Gubrium, 2004). Because the interview is contextual, resulting from information gathered in an interaction between the researcher and the participant, it can assist in understanding the participant's experience of brand, an important consideration in the context of this research.

A compelling reason for the use of interviews as a method for data collection is that, because interview participants are also actively involved in the construction of their own subjective experiences, interviews have the potential to provide deep insights into the participants' experiences (Holstein & Gubrium, 2004). Denzin and Lincoln (2000) suggested that the experiences of the participants might include their values, beliefs and aspirations.

Gill et al. (2008) identified three types of interview: the structured

interview, the unstructured interview and the semi-structured interview. The authors advocated for the semi-structured interview, noting that this style of interview approach provides the interviewer with the freedom to move in different directions to obtain more detail or explore a new idea in the initial response. This approach also provides a level of flexibility that structured and unstructured interviews do not (Richardson & St. Pierre, 2005). The inherent flexibility of this approach assists in generating a stronger connection with the participants and allows the researcher to explore unplanned, or unanticipated topics that might emerge during the interview (Smith & Osborn, 2008). Similarly, the conversational approach to interviewing creates more opportunities for the researcher “to become better informed, shaped or enriched by this experience so as to be able to render the full significance of its meaning” (van Manen, 1990, p.62).

However, notwithstanding the apparent strengths and benefits to the social constructionist researcher of an interview approach to data collection, the method does have the potential for weaknesses. Fontana and Frey (2003) identified three problems that the researcher should be aware of, and for the researcher to consider. These problems are largely ‘human’ in nature in that they are likely to arise during the course of the interaction between the interviewer and the participant. The first issue for the researcher is that, in order to create a connection with the interviewer, the participant may feel that they should give socially desirable responses to questions. Their reasons for doing this are multiple, including to ‘push’ the interview along and bring it to a conclusion, or to avoid an uncomfortable, awkward or embarrassing discussion. The second potential problem is that the participant may have forgotten aspects of the subject, have an incomplete recollection of various events or has become confused with the passing of time. The third weakness concerns the possibility of the interviewer and the participant being unable to develop a productive relationship. As a result, the participant is likely to be more reluctant to engage with the subject or issue.

In this study, the research questions required an approach that would provide an in-depth understanding of the challenges that universities may

face as they construct their brand identities in the twenty-first century. The semi-structured interview method enabled me to probe the participants to obtain deeper and more substantive responses in order to gain rich insights, explore issues, meanings and experiences.

Data analysis method – thematic analysis

In relation to how the data collected in this study might be analysed, Braun and Clarke (2006) wrote, “thematic analysis conducted within a constructionist framework seeks to theorise the socio-cultural contexts, and structural conditions, that enable the individual accounts that are provided” (p. 85). The authors stated that thematic analysis is a method for identifying, analysing and reporting patterns (themes) within data.

Therefore, a thematic analysis that applies a social constructionist lens does not merely describe the data collected, but seeks to uncover the underlying meanings, assumptions, perspectives and beliefs behind the social interactions, attitudes and behaviours.

Rubin and Rubin (1995) said that thematic analysis is an appropriate method because, “you discover themes and concepts embedded throughout your interviews” (p.226). Ely et al. (1997) referred to the distinction between the passive process of data analysis and the active role that the researcher undertakes in identifying the patterns and themes:

[Thematic analysis] can be misinterpreted to mean that themes ‘reside’ in the data, and if we just look hard enough they will ‘emerge’ like Venus on the half shell. If themes ‘reside’ anywhere, they reside in our heads from our thinking about our data and creating links as we understand them. (pp.205-6)

Thematic analysis can be a method that reports experiences, meanings and the reality of the participants. It can also be a constructionist method, examining the ways in which events, perceptions, meanings and experiences are the result of a range of interactions occurring within social contexts (Braun & Clarke, 2006). Thematic analysis can be a method that reflects reality, and it can be a method to breakdown and untangle the participant’s understanding of reality. However, Braun and Clarke (2006)

cautioned that any theoretical framework carries with it a number of assumptions about the nature of the data and a good thematic analysis will make this apparent to the reader.

To summarise, thematic analysis involves the searching across a data set, in this case a number of interviews, to find repeated patterns of meaning - themes. Braun and Clarke (2006) stated that it is important to note that the analysis is not a process where the researcher simply moves from one phase to the next. Rather, it requires movement back and forth as required.

Braun and Clarke (2006) wrote that thematic analysis is widely used, but there is no clear agreement or understanding about what thematic analysis is and how a researcher should go about doing it. Accordingly, in the following section, I lay out in detail the specific steps taken in the data collection and analysis for this study.

Data collection and the participant sample

In this section I discuss how the data was collected, why and how the countries and participants were selected, the type of universities where the participants were employed and, the process that I followed in conducting the interviews.

Universities

In Chapter 1, I outlined the rationale for selecting the USA, the UK, Australia and China as the countries for my investigation. In summary, I believed that these countries broadly represented the challenges being faced by universities across the world. The 10 universities that were included in this study are not identified by name. The ethical approval for this study required that all information gathered from participants should remain confidential to my supervisors and myself and will only be used for the purpose for which it is collected. Therefore, a brief description of the type of university is provided.

United States of America

University A

University A is a public comprehensive university with a global ranking in the top twenty (QS, 2017). This university is research-intensive and regarded as highly aspirational by prospective students and staff. The university is world-renowned and has over 40,000 students enrolled.

University B

University B is a private four-year Catholic university. It has over 20,000 students enrolled, engages with global rankings, however it is not highly ranked despite being research-intensive.

University C

University C is a private four-year university. The university is ranked in the top 300 by both THE and QS and is research-intensive. The university has an enrolment of approximately 15,000 students.

United Kingdom

University D

University D is a research-intensive public university in England. The University is ranked in the top 200 by both THE and QS and has an enrolment of approximately 17,000 students.

University E

University E is a research-intensive public university in England. The University is ranked in the top 100 by both THE and QS and has an enrolment of approximately 17,000 students.

University F

University F is a research-intensive public university in Scotland. The University is ranked in the 100's by both THE and QS and has an enrolment of approximately 25,000 students.

People's Republic of China

University G

University G is a research-intensive public university and one of the oldest institutions in China. The University is ranked in the top 200 by both THE and QS and has an enrolment of approximately 20,000 students.

University H

University H is a research-intensive public university. The University has recently climbed considerably in the rankings and is ranked in the top 100 by both THE and QS. This university has an enrolment of approximately 50,000 students.

Australia

University J

University J is a research-intensive public university. The University is ranked in the top 100 by both THE and QS and has an enrolment of approximately 45,000 students.

University K

University K is a research-intensive public university. The University is ranked in the top 300 by both THE and QS and has an enrolment of approximately 25,000 students.

Having identified the countries and universities to be included in this study in the next section I discuss who should be the most appropriate subjects for the university interviews.

Interview participants

Context, such as the country, region/location, industrial setting, market, role, or political environment may have an important impact on an individual's shared experiences and will accordingly shape how they create knowledge (Berger & Luckmann, 1991).

Both academic and non-academic staff play a role and have responsibility for developing and managing a university brand (Belanger, Mount & Wilson, 2002). Accordingly, the selection of appropriate participants for this research was important to the richness of the data to be collected: their accounts were intended to provide insights into how they made sense of their experiences. How these different interviewee types made sense of the complex issues confronting universities and ascribed meaning to their situation was of critical concern to this study. Therefore, the participants chosen for the interviews encompassed both the academic and non-academic staff in universities. Further, given the nature of brand as being strategic in nature and central to the core mission of the university (Aaker, 2014; Clark, 1972; Keller & Lehmann, 2004), the participants needed to be leaders in the university. In this sense, and in order to understand brand in the university, I needed to look at the behaviours, motivations and intentions of university leaders as they related to brand.

The categories and rationale for selecting these three participant types in each of the universities was as follows:

Senior leaders. The importance of brand as a valuable intangible asset of the organisation requires strategic management (Aaker, 2014, Keller & Lehmann, 2004). As the most senior executive of the university, a President/Vice-Chancellor, Provost or designate was deemed most appropriate to provide important insights about how the senior leaders

make meaning of the challenges confronting their university and universities more broadly.

Senior Marketing Officer. As the operational manager of brand in the university, the most senior marketing executive is an expert voice on the subject matter and therefore appropriate to provide valuable insights about the nature of a university's brand, how universities approach branding and insights into the emergence of, amongst other challenges, digital disruption (Saunders & Townsend, 2016).

Academic Dean. The literature suggests that the inter-relationship between the university brand and the faculty was of critical concern in understanding how universities communicate their brands (Chapleo, 2011; Jevons, 2006; Mampaey, Huisman & Seeber, 2015;). That there are tensions as universities construct their brand identity was also a feature of the literature (Temple, 2011). Accordingly, how the Academic Dean made meaning from their experiences, in particular their organisational situations, may be an important consideration in understanding how universities construct their brand identities.

I conducted six interviews in each of the USA, the UK, China and Australia across a total of 10 universities. In my research proposal I planned to interview two senior leaders, two senior marketing officers and two academic deans from two universities in each country. In order to ensure that the proposed number of participants for each country was achieved, it was necessary to expand the number of universities in the USA and UK to three (from two). The reason for this was that it was not always possible for me to source three participants from each university, either because the university was not willing to provide three participants (UK), or because when I arrived at the university to conduct my interviews the nominated participant was no longer available (USA). Accordingly, I made alternative arrangements to ensure a complete interview list.

Due to the nature of the research it may not be difficult for a reader to determine the designation of the respondent. Therefore, participants were not specifically identified in the reporting of the research findings.

As the interviews were conducted in confidence, codes have been assigned to the university and the participants as follows:

United States of America

University A	Interviewee A1 – Provost Interviewee A2 – Marketing Director
University B	Interviewee B1 – Marketing Director Interviewee B2 – Academic Dean
University C	Interviewee C1 – Vice-President Interviewee C2 – Academic Dean

United Kingdom

University D	Interviewee D1 – Vice-Chancellor
University E	Interviewee E1 – Marketing Director Interviewee E2 – Academic Dean Interviewee E3 – Acting Vice-Chancellor
University F	Interviewee F1 – Marketing Director Interviewee F2 – Academic Dean

People’s Republic of China

University G	Interviewee G1 – Vice-President Interviewee G2 – University Relations ¹ Interviewee G3 – Academic Dean
University H	Interviewee H1 – President Interviewee H2 – Academic Dean Interviewee H3 – Head of Promotions ¹

Australia

University J	Interviewee J1 – Deputy Vice-Chancellor Interviewee J2 – Academic Dean Interviewee J3 – Marketing Director
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University K Interviewee K1 – Vice-Chancellor
 Interviewee K2 – Marketing Director
 Interviewee K3 – Assistant Vice-Chancellor

¹ University Relations and Head of Promotions at these universities was the most senior executive responsible for marketing activities.

The interviews

This section discusses the data collection method. I carried out the interviews from November 2015 to May 2017. I began in the USA in November 2015, then to the UK in August 2016, China in October 2016 and finally Australia in April and May of 2017.

I prepared an interview schedule (see appendix A) with a list of lead questions addressing the overarching objectives and related research questions for this study. The semi-structured interviews employed open-ended questions and language that it was anticipated that participants would be familiar with, and this was aimed at encouraging more detailed responses that allowed the conversation to flow and explore the issues raised in depth. The questions were not prescriptive and were designed to guide conversation, rather than providing a rigid framework that should be strictly adhered to. The lead questions, and the nature of the discussion, initially focussed on the participant's experiences with brand in the university context. However, the semi-structured interviews allowed the participants to share their ideas and experiences about how brand has evolved as a focus for universities over time, the challenges and opportunities that the participant could foresee for university brands in the twenty-first century, and the particular meanings that the individual attributed to their experiences and for the idea of a university. For example, 'What does brand mean to you?', 'Tell me more about that', or 'How did you feel when that happened?'

It was anticipated that one initial face-to-face meeting would be conducted with each participant, and between 60-90 minutes would be allocated to

each interview. This was successfully undertaken, with the exception of Australia where the interviews were conducted by Skype video. The interviews were audio recorded and transcribed in full, then broken down into a series of narrative descriptions and, for validation, returned to the participants for clarification and editing. In China I was accompanied by a translator for each of the interviews. In this situation I engaged a translation service to transcribe the interviews, and I then referred the transcription to the translator that accompanied me to ensure accuracy of the text. China proved to be a challenging country to conduct my interviews. Beyond language and translation, it was quite difficult to extract definitive responses from questions to the participants in China. While always polite and considered in providing responses, it was clear to me that the political influence was very strong, and as a result I would describe the responses from the participants as careful.

In accordance with my ethical approval, participants had the right to refuse to answer any question or to request that a particular line of questioning be discontinued if they so elected. The participant was also able to withdraw from this study at any time prior to the point of analysis. No participant elected to withdraw

Overall, I was very pleased with the level of cooperation, and even enthusiasm for the study, from the participants. On at least four occasions I was invited to return and present my findings should an opportunity arise. Of course, there were instances where the participant was more cautious and hesitant however I was able to adjust my style in these circumstances, and while it may have extended the length of the interview, I was able to create an atmosphere where less forthcoming participants appeared to relax and share more freely.

Data Analysis

Braun and Clarke (2006) helpfully provided a guide that takes the researcher through the six phases of thematic analysis. In this section I outline how I undertook the thematic analysis using these six phases.

Phase 1: familiarising myself with the data

At this phase in my analysis, I either transcribed the interviews myself or I arranged for a third-party transcription service to undertake the initial transcription. The transcription was then checked as a correct record of the interview, by replaying the audio recorded and matching it to the text. I read the transcripts through and inserted columns to the right of the transcribed interview where detailed observations and comments were made that might enable me to identify themes in the data.

Braun and Clarke (2006) stated that it is vital that researchers immerse themselves in the data to the extent that they are completely familiar with the depth and breadth of the content, noting that, "immersion usually involves repeated reading of the data, and reading the data in an active way searching for meanings, patterns and so on" (p.87).

Phase 2: generating initial codes

Braun and Clarke (2006) explained that this phase involves the production of initial codes from the data. These codes are used to identify a feature of the data (semantic or latent content) that appears interesting to the analyst, and the codes should refer to "the most basic segment, or element, of the raw data or information that can be assessed in a meaningful way regarding the phenomenon" (Boyatzis, 1998, p.63).

A thematic analysis typically focuses on either a semantic or a latent approach. At a semantic level, the themes are identified within the surface meanings of the data, and the analysis is only concerned with what a participant has said.

In contrast, a thematic analysis at the latent level identifies, or examines, underlying ideas, assumptions, and conceptualisations in the data. Accordingly, the development of themes requires interpretation and the analysis that is produced is not just description of what has been said.

In this research, the analysis goes beyond what is actually said during the

interviews and is specifically looking to understand underlying ideas and implications for the idea of a university and the university brand. This thematic analysis is therefore latent in nature.

Braun and Clarke (2006) suggested that the researcher work systematically through the entire data set, giving full and equal attention to each data item, and “identify interesting aspects in the data items that may form the basis of repeated patterns (themes) across the data set” (p.89).

As with Phase 1, I made observations and comments and reported on interesting items in each transcript. I coded the individual data manually into meaningful classifications or groups. I looked for repetitive words, phrases or ideas, and listed them in order to identify repeated patterns that might emerge as themes. I attempted to find connections or relationships between and among those codes and categorise them. I used a highlighter, post-its and coloured pens to identify significant patterns. An example of how I coded the data is included in table 6 below.

Table 6 - Examples of coding

<i>Data extract</i>	<i>Code</i>
The culture of the place can be a factor in the construction of the brand.	Culture
The university should not construct a brand that is disconnected from its reputation.	Disconnected
Notwithstanding marketisation and the need for a university to market itself the university can't lose sight of its mission to educate.	Mission

Phase 3: searching for themes

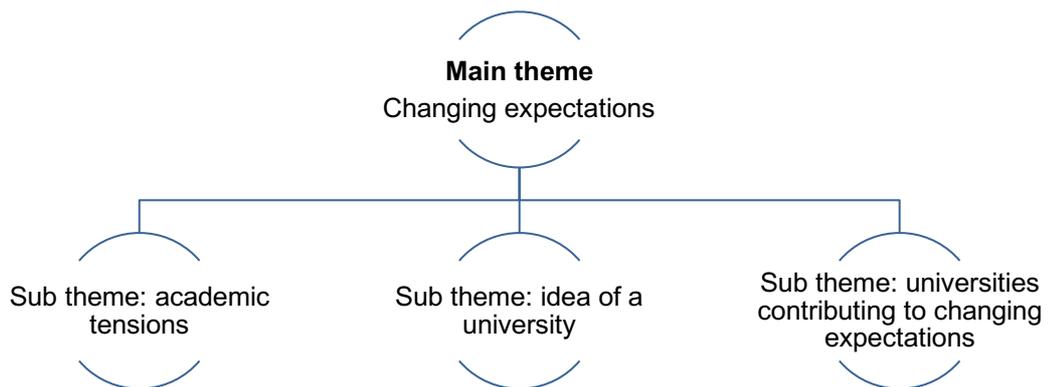
This phase focused the analysis at the “broader level of themes, rather than codes, involves sorting the different codes into potential themes, and collating all the relevant coded data extracts within the identified themes” (Braun & Clarke, 2006, p.89).

At this point I began the process of analysing the codes developed in phase 2 and considered how the different codes may combine to form an overarching theme.

Braun and Clarke (2006) note that at this stage the analyst, “may also have a set of codes that do not seem to belong anywhere, and it is perfectly acceptable to create a theme called miscellaneous to house the codes temporarily that do not seem to fit into your main themes” (p.90).

As with phases 1 and 2, I identified possible themes and considered potential overarching (consolidated) themes and patterns. I re-read and analysed the transcripts again to determine the number of occurrences of a particular theme (or grouping of themes) to determine whether the theme was more prevalent across country, type of participant or university. Figure 1 below shows how I mapped out the themes in order to determine the main themes that emerged from the analysis.

Figure 1 - Example of how a main theme was mapped out



Phase 4: reviewing themes

Braun and Clarke (2006) claimed that during this phase, it will become evident that some ‘apparent’ themes are not really themes. For example, if

there is not enough data to support them, or the data is too diverse. It was also possible that the themes might merge into each other, and after further analysis what I anticipated to be different themes actually became one.

The first objective in this phase was to ascertain whether the themes worked in relation to the data set. The second objective was to code any additional data within the themes that had been missed in earlier coding stages.

This was followed by an exploration of how these categories related to one another within the context of the participant's experiences. In other words, while I could gather together key shared experiences and observations, such as tension, differences between academic and professional attitudes to brand, and frustration, I then had to explore their connectedness to one another to inform research outcomes.

Phase 5: defining and naming themes

At this point, according to Braun and Clarke (2006), the researcher defines and further refines the themes that will be presented for the analysis and analyses the data within them. By 'define and refine', Braun and Clarke (2006) mean "identifying the 'essence' of what each theme is about (as well as the themes overall) and, determining what aspect of the data each theme captures" (p.92). Braun and Clarke (2006) also identify that, "it is important not to try and get a theme to do too much, or to be too diverse and complex" (p.92).

According to Braun and Clarke (2006), for each individual theme, the researcher needs to conduct and write a detailed analysis. As well as identifying the 'story' that each theme tells, it is important to consider how it fits into the broader overall 'story' that the researcher is relating about the data. Braun and Clarke (2006) suggested that one test for this is to determine whether the researcher can describe the scope and content of each theme succinctly.

This is an important phase. By the conclusion of this phase I was able to clearly define what the themes were. Interpreting the fundamental meaning of an individual's experiences and observations involves an intensive process of reading, writing, dialogue and critical reflection (Giorgi & Giorgi, 2008). Accordingly, the narrative description of the theme was as precise and detailed as possible.

It was at this point that I identified quotes from the participants that could be used as extracts to support and illustrate the findings.

Phase 6: producing the report

At the final stage I had a complete set of themes that related back to the research questions, thus permitting the reporting of my findings. Braun and Clarke (2006) stated that the task of writing the report of a thematic analysis is to ensure that the complex story of the data is told in a way that convinces the reader of the merit and validity of the analysis. The final report (including quotes) must provide the reader with a precise, coherent, and interesting account of the story that the data tells within and across the themes.

However, Braun and Clarke (2006) cautioned that the report should not be a simple description of the data. Rather, an argument in relation to the research questions.

The report of the analysis in this thesis attempted to describe the themes that emerged, and also reference back to the literature and any theoretical approaches. The story that emerged focused not only on the complexities associated with the construction of the university brand, and the construction of the idea of a university, but also outlined a range of challenges that the university will likely confront as it constructs its brand identity in the future.

Reflections on the research process

In undertaking this research, I was conscious that my role as a senior marketing executive in a university had the potential to both influence the responses from the participants, and the way in which I analysed the data. It is therefore appropriate for me to reflect on the research process. A reflection of this type is consistent with the literature. Lincoln and Guba (2003) defined this reflection as “the process of reflecting critically on the self as researcher, the human as instrument” (p. 283).

Scholars such as Alvesson and Skoldberg (2000), Corbin and Strauss (2008) and Finlay (2002) described the situation whereby a researcher’s values, beliefs, and assumptions can influence data collection and analysis. Mruck and Breuer (2003) argued that it is necessary for a researcher to reflect, because in the absence of such a reflection there is a risk that the final conclusions from the research could be regarded as having the “characteristics of objects” and, as “existing realities” (p. 3). It appears to be important for the researcher to examine how their influence may bring valuable insight to the outcomes, acknowledging that who we are, and who we become, during the course of the research process may help to provide accurate analyses and/or representations of the findings (Devereux, 1967).

It is important to also add that, while my own identity as a senior marketing officer in a university led me to adopt particular subject positions, such as, for example, wanting to be seen as knowledgeable on the topic, I did this to maintain credibility with the participants, many of whom were in very senior leadership positions at their university.

It is at this point that I will explain my interest in researching how universities communicate their brands. This was in part due to the frustration that I was experiencing as I attempted to apply traditional brand theory in my role as the senior marketing officer in the university, and in part because I viewed this research as the extension of the Masters research on the topic of marketisation that I completed at the University of Melbourne in 2012. It was this combination that led me to think deeply

about why, given how commercial much of the university sector appeared to be, that market-driven strategies were not implemented in the same way as they are in other organisations. To provide some context for this thinking, I will briefly describe my career and professional life to date.

I completed my undergraduate degree part time at the University of Technology in Sydney, Australia ('UTS') while working in the accounting profession with Ernst and Young. I subsequently enrolled in the Professional Year programme with the Institute of Chartered Accountants and graduated from this programme in 1992. I was never convinced that the life of an accountant was for me, and therefore I began the search for a more expansive role in business.

The next stage in my career began with a role as Commercial Manager at the Australian Rugby Union, based in Sydney. This was a watershed role for me because it coincided with two significant changes. In rugby, this was the beginning of the professional era, and with it came substantial television, sponsorship and commercial revenues. I was at the heart of these changes, actively involved in negotiations and the implementation of change processes. On a personal level I married my wife Kylie and we began a new family.

The role at Australian Rugby was also significant, because this was my first exposure to marketing and it excited me. I was particularly interested in the strategic aspects of marketing, notably understanding consumer behaviour, brand development, segmentation and predictive modelling. After four satisfying and successful years with Australian Rugby I moved on to Coca-Cola where I took my understanding and expertise of marketing to a new level. Coca-Cola provided me with training and development opportunities of the scale I have not since experienced, and I credit my understanding of brand development to this point in my career.

However, with a young family I was finding the travel too strenuous, and I was fortunate to secure the senior marketing and sales role at Sydney Racing, the entity that managed thoroughbred horse racing in Sydney. My

brief on arrival in the racing industry was to reposition the brand, from the traditional wagering/betting position, to one that was focused on entertainment. The results over that six-year period were extraordinary, and I reflect with considerable pride on my achievements. The next stop on my career timeline was land and property development.

As with any new industry sector or industry, there is a learning curve and it was only when I realised that we were actually selling finance packages attached to land allotments that I was able to approach this role with confidence. I was able to apply the skills and experience that I had developed over my career, and with a young family at home it was a role that was both local, and financially rewarding.

However, the global financial crisis, or 'GFC', had a considerable impact on the property sector and, for the first time in my career, the company where I was employed was so deeply affected that it closed operations. As a consequence, I was forced to look for a new opportunity beyond the property sector and a colleague recommended that I consider a career in higher education.

In 2008 I joined University of Technology, Sydney (UTS) as Marketing Manager and, almost from the day I arrived, I became inspired by the challenges and opportunities that the sector in Australia provided. At the time that I was employed with UTS it had been foreshadowed by the Australian Government that the higher education sector was to be subject to considerable funding reform. The Bradley reforms (Bradley et. al., 2008) fundamentally changed the way that universities could enrol domestic undergraduate students, removing caps and changing the sector to one that is demand-driven. As a professional marketer with strong expertise in brand, the opportunity to embrace these changes and create positive commercial outcomes via increased student fee income was obvious to me. Interestingly, I found considerable resistance to exploiting this opportunity, particularly from the academics, many of whom were concerned about perceived quality issues arising from allowing more students to be admitted.

I admit to some frustration at this position, and this was the first time that I began to realise that the university was not like other organisations (outside of higher education) where I had been employed. I was only with UTS for a relatively short time before I began a role that was to become pivotal in my career. I joined Australian Catholic University ('ACU') in 2010 and the brief was a simple one. The university wanted a clear and differentiated brand position, and it wanted to grow enrolments to take advantage of the new funding policy settings (Bradley et. al., 2008). In conjunction with the Vice-Chancellor, I set about developing plans and strategies to enhance the university's position in the various marketplaces that it participated and, seek opportunities to grow enrolments. This was achieved in each of the four years that I was with ACU, despite the fact that there was resistance on the part of many in the academic community, concerned about declining academic standards as the university expanded its enrolments. Another key development that occurred when I was employed with ACU was an opportunity to undertake further tertiary study. I was offered a Vice-Chancellor's scholarship to undertake the Masters of Tertiary Education Management at the University of Melbourne. It was a thoroughly enjoyable and immersive experience, and I found that researching the university as an organisation provided valuable insights about why the university behaved and responded to challenges in the way it did. My final research project was focussed on marketisation, and after graduating I was encouraged to pursue a doctoral qualification.

After completing my studies at the University of Melbourne I enrolled in a PhD programme at the University of Waikato. I was keen to explore how the development of brand strategy in the university differed from my own experiences outside of the university. I wanted to uncover the complexity that appeared to exist in the university as it tried to achieve consensus about positioning and to explore the apparent tensions that manifested in discussions about how the university communicated messages to its diverse stakeholder groups. At the same time, as a marketing professional, I was also interested in how the experiences and beliefs of people in different roles within the university impacted on how they

understood brand in the university.

In relation to my approach to this research and, consistent with Patton (2002), when conducting the fieldwork research for this thesis, I was simultaneously both an insider and outsider. As an insider, I identified both with the roles of the participants and the markets in which they operated. On the other hand, as an outsider I was a researcher, a stranger to the participants, only connected to them by a mutual colleague who had provided an introduction.

Conclusion

In this chapter I have outlined the theoretical framework and methodology that guided my study, together with a description of the methods used to collect and analyse the data obtained from the interviews.

The qualitative approach allowed me to obtain a rich description of the subjective experiences of the participants and the complexities of constructing brand in universities. I have also detailed how my own experience as a marketing professional informs this research. In addition, this chapter has outlined the research process, including how I determined the sample selection criteria, how data was collected and, a step by step description of the thematic analysis.

Chapters 5, 6, and 7, which follow, present the findings from the thematic analysis of the data collected from the interview. The findings chapters present the data in such a way so as to inform the responses to the research questions for this study.

Chapter 5 – Strategic challenges for universities as they construct their brands

Introduction

The goal of this chapter is to respond to the first of the research questions: what are the strategic challenges for universities in constructing a brand in the twenty-first century? The themes that emerged from this study are interrelated and therefore this chapter also informs the third of the research questions: what is the role of leadership as universities construct their brand identity in the future?

This chapter focuses on exploring the participant's views about the purpose of the university. It appears from the responses that some of the university's key external stakeholders, notably employers and government, have constructed a purpose for universities that may be different to how most of the participants in this study understand it. This chapter examines the range of participant perspectives on the nature and purpose of the university, now and in the future, and explores how these potentially conflict and contradict each other. In addition, I discuss why these differences could be significant for the leadership of universities as they enact plans and strategies to construct and communicate their brands in the future.

There are six themes presented and discussed in this chapter: role of government; the credential; changing expectations; digital disruption; personalised education; and, disruptive innovation. These themes are identified in the discussion as challenges for universities as they construct their brands in the twenty-first century

Role of Government

There was clear evidence from the responses that the impact of government policy settings presents a strategic challenge for universities as they determined, not only their desired brand positioning, but how to communicate their brand. The codes that contributed to this theme included government, policy, regulation, and funding.

Participants in the UK, Australia and the USA reported that the uncertainty about these settings, and in particular the funding models that governments determine for higher education, was causing them to be cautious in their decision-making. According to 17 of the participants, the relationship between government and universities is of fundamental importance to universities. Therefore, the interview question that asked ‘to what extent does government policy influence university decision-making?’ evoked enthusiastic engagement with most of the participants. For example, one senior leader remarked, “it is inconceivable that we would make significant changes to the way we are operating without considering the implications of government policies” (Interviewee D1, vice-chancellor, UK).

In China, the role of government was considered by some of the participants to be integral to the role of the university. When questions about funding issues and policy settings were asked there was little engagement from the interviewees. For example, in response to the question ‘to what extent does government policy influence university decision-making?’ the participants generally responded that government policy and influence was total. For many participants in China the role of government and the role of the university appeared to be closely intertwined. It is possible that these responses can be attributed to the cultural, historical and political factors that are particular to China. As described in Chapter 2, the university in China is a closely moderated institution that responds to the needs of the State, rather than the traditional, Western understanding of its role as critic and conscience of society (Tran, 2017; Zhang, 2017).

However, there was some evidence that this was changing. To illustrate this point, in an interview with an academic dean, he outlined the historical context that explained how universities in China were evolving:

Up to the Cultural Revolution, learning was rote learning. And even today, China is starting to accept the fact that ‘hey! we can innovate’. I mean, convincing students of that was hard and I kept saying to them that in fact, they can innovate.

Look at high speed railroad, it leads the world. So there is now slowly becoming a recognition that we are as good as the guys in the West, but because it's always been that we are second to the guys in the West, we want to aspire to be a Western university. We don't care what Western university partners with us, as long as it is a Western university. Now we have become more selective. Some [Chinese] universities are going through the process, looking at which ones do we want to keep, which ones do we want to let go. (Interviewee G3, academic dean, China)

In the USA, the UK and Australia the lack of clarity about funding regimes and, more broadly, policy direction into the future was a concern expressed by some of the participants. In discussions about compliance with government policy, many of the participants referred to the increasing pressure on universities to increase enrolments and to develop strategies to increase the retention of students. From their responses it was apparent that these pressures were encouraging marketers to find new student cohorts, including engaging with non-traditional student markets such as minorities, indigenous and first-generation students. One participant noted, "one day we were focused on recruitment, finding new cohorts and then policy changed and then we needed to retain them" (Interviewee J3, marketing director, Australia). Another participant claimed, "we spin our wheels on recruitment strategy but suddenly the government introduces caps so we stop" (Interviewee E2, academic dean, UK).

The role of government and its policy settings was considered by most of the participants to be influential on how universities developed their brand strategies and their associated marketing efforts. For instance, one participant stated, "education is a peculiar kind of industry. Institutions operate as autonomous entities but [are] dependent on student numbers and, most importantly, political policy" (interviewee B2, academic dean, USA). Another participant claimed that universities, despite their claims of autonomy and independence, are largely bound to the will of government ministers. She said, "for ministers themselves, the fundamental question concerns the basis of their policy-making and the treatment of individual institutions" (interviewee E2, academic dean, UK). Similarly, a participant noted that there was increasing speculation by her colleagues at the

university about the potential for the Australian government to further deregulate student enrolments with the removal of fixed pricing. She was concerned that this would have the effect of increasing marketing and admissions costs as universities invested more heavily in brand-related activities as they attempted to compete intensely with other providers for market share:

With the government maintaining control of overall student numbers through controls on recruitment, we would see more outfits competing for a limited number of students: intensifying competition. It is one thing to use private providers to increase overall capacity, quite another to intensify a zero-sum game: recruitment and marketing will eat up a significant proportion of the new higher fees.
(interviewee K3, assistant vice-chancellor, Australia)

When asked a question about the extent to which government policy influences university decision making, a participant explained the situation as he viewed it. He said that there is a dilemma for universities as they develop their brand positioning and commercial strategies. This is largely because the government has “one hand dipped halfway into the college pudding” (interviewee C1, vice-president, USA) and this may be causing universities to stray from their traditional missions as they adjusted to government policy changes. According to him, the response to the college cost problem is clear: “get the government’s hand completely out of the pudding” (interviewee C1, vice-president, USA). Another participant claimed, “if we removed the government’s role, college education would function more like a market and price would naturally come down due to market forces” (interviewee B2, academic dean, USA). However, according to one senior leader, this might not necessarily be the outcome if government was to remove itself completely. He contended, “market forces would not actually function to bring costs down. Due to a wide range of demand pressures, particularly at middle and upper-tier schools, removing the government would simply limit access for low-income students” (interviewee A1, provost, USA). When a follow-up question was asked to seek further clarification, he claimed, “viewed along with the important notions of fairness and equity that we associate with higher

education, we want and need to have a public presence in higher education”.

Industry collaboration was identified by three of the participants as an important new source of funding for Australian universities to mitigate reductions in State contributions. For example, one participant reported that the tertiary sector is moving away from traditional funding models, models that relied on government-based funding and grants, to more profitable industry collaborations. In order to do this, he said that universities were investing more resources into marketing activities. Reflecting on proposed changes to the funding of higher education in Australia, he commented:

It is clear that the tertiary institutions of today can no longer safely rely on the funding arrangements from past governments. Australian universities are under pressure to seek and invest into alternative arrangements to maintain their operations. (Interviewee J1, deputy vice-chancellor, Australia)

In the USA and the UK, the participants there suggested that universities were seeking to develop stronger partnerships with industry, for reasons that appeared to extend beyond new funding streams, but also to inform academic programmes and provide internship opportunities for students. For example, one participant implied that this may be in response to a perceived need to reposition their brand to be more aligned to customer expectations: delivering programmes that satisfy market demands. Another participant said, “a growing number of internships and placements are organised for students in their respective course industry, providing them with relevant industry experience”. He continued, “to not deliver courses that are setting up our students for success in their chosen field is considered failure by many of our key stakeholders” (interviewee E1, marketing director, UK).

And yet, this collaboration model did not go unchallenged, with two participants in academic roles expressing concern about the growing influence of external groups on academic programmes. One participant reported that some academic and research staff are resisting the change,

claiming that universities need to preserve academic independence and the purity of the mission. Similarly, a participant contended that independent research needs to remain separated from the external influence to ensure its integrity. He stated, “while I get that we need to find new funding sources, I wonder about the price we might pay for it. Management might not be concerned but my colleagues are” (Interviewee J2, academic dean, Australia).

The uncertainty about the funding policies in the USA, the UK and Australia appeared from the responses to have prompted some universities to reconsider the structure of their academic units and their supporting administrative units. In most cases this was aimed at reducing costs, improving efficiencies and/or making the organisation more nimble so as to pursue new revenue streams. A senior leader said, “as we deal with funding cuts we also face the reality of reorganising ourselves to achieve savings in order that the valuable research work can continue” (Interviewee D1, vice-chancellor, UK).

According to nine of the participants, the increase in organisational restructures has sparked a ‘role confusion’ within higher education providers. Five of the participants, four of whom were in academic roles, claimed that, on the one hand there appears to be a strong, commonly held belief that one of the main purposes of the university system is to provide a high level of education, which also happens to equip students with necessary workforce skills. However, on the other hand, the shift to research and industry collaboration is impacting on how universities approach the development of their curricula. One participant remarked, “it is highly unlikely that we would ever develop new teaching models without considerable input from industry. Our students expect that as a minimum” (Interviewee J2, academic dean, Australia).

Seven of the participants also identified that the organisational structure of their university had undergone rapid change as a result of a desire on the part of leadership to include more industry-based expertise. For example,

the same seven participants noted that there has been moves towards contract-based employment of research staff and a growth of 'casualisation' - full-time roles being converted to part-time or casual positions. According to these participants, this has led to a concern amongst academic staff about the stability of their jobs. A participant claimed, "with the recent shift towards recruiting teaching staff with extensive industry experience there is a fear amongst many of my colleagues that we might quickly become a relic of the past" (Interviewee B2, academic dean, USA).

At the same time, many of the participants reported increased recognition of the importance of marketing. This was to enable universities to compete more intensely for students and other necessary resources to fund their activities and make-up for declining government contributions. For example, one participant claimed, "we are being pressured by further decreases in public funding, constantly requiring the sector to do more with less and yet, still expecting increasing outputs from decreasing inputs" (interviewee K3, assistant vice-chancellor, Australia). One academic noted, "while I understand we need to tighten our belts as funding becomes harder to secure, this seems to have the effect of increasing our marketing spend. That doesn't always sit well with me" (Interviewee E2, academic dean, UK).

The role of government is likely to remain an ongoing strategic challenge for universities as they construct their brands. The sentiment expressed by the participants is consistent with the observations of Chapman (2012), Gutierrez (2016) and Norton (2017). These authors, writing about the university of the future, claimed that, in industrial society governmental regulation was partly a matter of deciding how many engineers, teachers, doctors, and lawyers were needed, and partly what research was required in the national interest. According to many of the participants, the government appears to see a role for itself that extends beyond a financier and, therefore, despite introducing policy settings that reduce the cost of higher education to the public purse, this does not appear to these participants to have been accompanied by any corresponding reduction in

the regulatory requirements from government. As a consequence, it appears that the ability for universities to embrace marketisation strategies and develop truly differentiated brands may be restrained by government policy settings. While not unique to the higher education sector, this represents a challenge that could be critical in the context of how universities are able (or not) to respond to new market dynamics and provide programmes and 'product' that is relevant to the needs of their diverse stakeholders.

The Credential

The credential is referred to in the literature as the heart of the business of universities (Milligan & Kennedy, 2017) and therefore establishing trust in the credential is core to its brand identity (Aaker, 2014; Holt, 2002; Keller & Lehmann, 2004). If the value of the credential is perceived to be declining, this may represent a significant challenge for universities as they construct their brand identities and it may also represent a challenge for leadership as universities construct their brand identity in the future. The credential was perceived by 14 of the participants in the UK, the USA and Australia to be declining in value, especially to employers and external stakeholders. The view expressed by the participants was that this perception might flow through to students and therefore impact on enrolments. For instance, a senior leader observed: "we've now shifted to an idea where you don't need a degree, at which point the providers start to disappear" (Interviewee E3, acting vice-chancellor, UK).

The codes that formed this theme included degree, career, university business and outcomes. Reference was made by some of the participants to possible market corrections. There was even frustration and anger expressed by them about the lack of understanding in the community and by some of the university's key external stakeholders, of what a university education is and how it can contribute to society. By way of example, one participant forecast:

We could be in for some real sector change, especially if the credential is in some way diminished in value. This then will force universities to rethink what they are selling and, given

the huge interest in graduation employment rates and vocational outcomes, this could be paradigm shifting. (Interviewee C2, academic dean, USA)

Another participant claimed:

If employers decide that it's not about necessarily the degree but the extent to which a student or a potential employee can think, and can learn, and can adapt, that's of more value than a degree. If that becomes accepted practice, then that could well and truly be a tipping point for universities. (Interviewee B1, marketing director, USA)

However, while this was an issue that the participants in the UK, Australia and the USA readily discussed, it was significant that none of the participants in China raised this issue, despite probing with follow up questions to create opportunities for them to do so. On reflection, this was not surprising because, as described earlier in this chapter, the participants generally reported that the mission of universities in China appears to be more closely linked to job opportunities for students than universities in the USA, the UK and Australia. The reasons for this are complex and, it would appear that this could be as a result of cultural and political considerations discussed in Chapter 2, rather than a deliberate strategy on the part of universities.

Nevertheless, more so than in the USA, the UK or Australia, the responses demonstrated that Chinese universities have positioned their brands to encompass graduate outcomes/employability. To illustrate, an academic, discussing how prestige at his university is considered, noted:

There is emphasis on prestige, reputation of the university. Because, depending on which university you graduate from, that's going to determine the nature of the job that you are going to get. So, if you are in a top 10 university, you are likely to get a good position in a government or state-owned enterprise. (Interviewee G3, academic dean, China)

In the UK, Australia and the USA the responses to a question concerning student expectations from universities were passionate. Most of the participants engaged with this question and it appeared that they had been

thinking deeply about this issue. Participants expressed that, while the degree was still important for students as they sought employment opportunities, increasingly students expected more industry experience and employable workplace skills. For instance, a participant remarked:

Student demands for return on investment are increasing, with students no longer seeing themselves as mere beneficiaries of a university education. Rather, students increasingly want much more from their university and, their expectations for both a quality education credential and improved employment outcomes are increasing.
(interviewee E3, acting vice-chancellor, UK)

Another participant reflected on the changes that she was seeing in the marketplace for new students:

The threat to the value of the credential I think more than anything else has become more evident in the past ten years or so, that's why I view it in two parts - people still value the credential but they also want to know what that degree means. What will it mean in the marketplace for me, in terms of taking the next step in my life? (Interviewee B1, marketing director, USA)

In the same way, an academic emphasised:

For business it's no longer the piece of paper. It's actually what experience you have in starting up companies. Gone are the days when you start up one company in your life and that will be it forever. Now you've got to have started up three before you even get the seat at the table. (Interviewee J2, academic dean, Australia)

The credential was considered so important to the business model and the brand identity of universities that some of the participants expressed concern about the financial sustainability of universities should it continue to decline in value. For example, an academic, discussing the shift in demand away from traditional qualifications, stated, "I think there will be a number of schools in the next 10 years, and I'm talking specifically privates, that are going to be in big trouble and may potentially close" (Interviewee C1, vice-president, USA).

This was clearly an issue that many of the participants had been considering in their universities. A senior leader, in response to a question about the future for universities, observed:

Wisdom is the word. This is about generating wisdom in the society and you know, cultural education. Where would the arts and humanities be if we were just thinking purely about jobs? Now, of course some jobs ask about humanities, but it's nothing like part of the reason. You need cultural population, a group of people who understand the value of reading art. It's a broader, and much deeper, set of things with enrichment of values. (Interviewee D1, vice-chancellor, UK)

This sentiment was echoed by one of the participants in a marketing role. He responded to a question about how universities communicate their brand as follows:

We have something like 400,000 students graduating across the UK every year. Is there a job for each of the 400,000 graduates? No! Does this put pressure back on universities? Yes. Does that tarnish the credential? Absolutely, but we need to convey that studying at a university is more than a job seeker experience. The Government doesn't seem to understand that, and we need to do a better job explaining to the community what a university is and, for that matter, what a university is not. (Interviewee E1, marketing director, UK)

In relation to wider discussions about the diminishing value of the university credential, not all of the participants believed that this was necessarily a bad thing for universities. While acknowledging that he had very little expectation that everything would, and should, stay the same, a senior leader advocated for a return to the traditional mission of universities:

Is the primary purpose of the degree so that you can be employable? Is it the primary purpose of the degree so that you can spend some time thinking and reading for the degree and therefore just expanding your knowledge? That has changed to the former for the latter over the last few years. But I think we will see some change or correction and it will be more about knowledge in the future. (Interviewee E3, acting vice-chancellor, UK)

The same participant also remarked, during a discussion about the potential for a market correction, "because we've had this great expansion.

And you could argue that some of that expansion wasn't really necessary” (Interviewee E3, acting vice-chancellor, UK). An interpretation of the comments by this participant is that, over time, universities have expanded their enrolments as factors such as globalisation have contributed to governments around the world adjusting their policy settings to encourage mass, and in some cases universal access to higher education. The participant claimed that this expansion may be at risk if the environment for universities changes. One possible outcome of this situation is that if industry determines that universities are not to be the ongoing provider of human capital, then the need for mass access to higher education is threatened and some providers might exit the market. This seems to be the correction that the participant referred to.

The value of the credential to universities is reflected in the literature. Andrews (2018) wrote that the credential is a symbol of education and knowledge attainment, one that values cultural, vocationally-oriented knowledge and skills to a higher standard than someone that does not possess a university degree. The responses from the participants, particularly those from the USA, the UK and Australia, indicated that this is a symbol that universities use to at least partially construct a differentiated brand identity to set it apart from other education providers. According to them, this positioning might be impacted by changing attitudes towards its value and importance.

The diminution in the value of the credential may be marketisation in action, influencing the fundamental mission of universities away from new knowledge to a more applied paradigm, one more in keeping with Habermas (1989) than Newman (1852) and von Humboldt (1809). In response to the diminishing value of the credential, the literature suggests that universities should seek to either reposition their brand identities to reflect brand image, or, to reinforce the traditional benefits of a university education - shape the construction of brand image towards desired brand identity (Aaker, 2014; Temporal, 2002). James (2017) is not optimistic about universities adapting, arguing that as it becomes evident that universities are not able to deliver the benefits that students and

employers are seeking this will in turn diminish the value of the credential even further.

According to many of the participants, if the value of the credential continues to decline, this may in turn have a substantial impact on the 'product' that a university has to 'sell' and the university's reflected brand image will move further from desired brand positioning. The question for universities then becomes, if the university is not providing a valuable credential, how are universities adding value, and why would a student continue to pay for their services? The responses from the participants in this study suggest that universities might seek to maintain relevance by drawing on their core values, values that have largely been shaped by history. The next three themes that emerged from this study may render this approach problematic.

Changing expectations

The third of the themes that emerged from the analysis of the data was changing expectations. This theme is connected to the perceived decline in the value of the credential described in the section above in that changing expectations from some key external stakeholders have contributed to the decline in value. This has implications for the construction of a university's brand, as a potential gap between brand identity and brand image is likely to arise. In brand parlance, brand identity speaks to where you want to be (your desire), whereas brand image speaks to who you are (others' view). The first research question asked, what are the strategic challenges for universities in constructing a brand in the twenty-first century? According to most of the participants, there has been a shift in the expectations of universities from external stakeholders and therefore the decision for them is how to *narrow the gap* between brand identity and brand image (Aaker, 2014; Temporal, 2002). The codes that contributed to this theme included expectations, idea of a university, academic tensions, employers, sustainability, spirit, university character and university values.

It appeared from the responses that at least some of the universities important external stakeholders have constructed an idea, or purpose for the university that is not consistent with the traditional idea of the university. The participants suggested that, over time, employers and government had determined, or shaped, a role for universities that was more focused on employment outcomes, and objectives that were more aligned to industry, vocations and serving the needs of the knowledge economy. This evolving role for universities prompted 15 of the 24 participants to question what the future role for universities might be as the university's commitment to its traditional mission was at risk.

The data that I obtained in relation to this theme was extensive, and therefore this section is presented as three interrelated sub themes: idea of a university; academic tensions; and, universities contributing to changing expectations.

Idea of a university

Most of the participants expressed an understanding of the idea of a university that was remarkably similar. This idea was at least partly shaped by their role and their experiences.

The responses to a question concerning 'what do you think a university is?' were consistent across most of the participants, with 20 of the 24 participants engaging enthusiastically with this subject. For example, references to 'knowledge for knowledge's sake'; 'critic and conscience of society'; a 'higher level of learning'; 'a holistic education'; 'preparing students for the future'; and 'a place where academic freedom and the pursuit of new knowledge is nurtured' were recorded.

However, the descriptions varied between roles and countries. To illustrate, those participants in academic and senior leadership roles were more likely than those participants in a marketing role to explicitly identify a purpose for universities that included traditional values such as academic freedom, and critic and conscience of society. A senior leader

spoke to 'the idea' as he believed that it was understood inside his university:

The reason, in our eyes, is that a truly educated person should have exposure to all different disciplines and we have a core that includes English, history, theology, philosophy, human sciences and language. And our belief is that by offering students that kind of exposure, on a practical level this breadth helps many of our students figure out what they want to study, and at a more philosophical level it creates for them stronger communication, critical thinking and elliptical organisational skills that can benefit them no matter what they do. There are a few among faculty who believe that if you talk too much about job placements and internships, that we become a little bit too careerist. (Interviewee C1, vice-president, USA)

In an apparent contrast, a participant in a marketing role suggested that, "a university is selling self-improvement. It's selling a way of thinking. It should be selling values, it should be selling a value of learning, value of ethics, value of applied knowledge, to whatever the skill may be" (Interviewee B1, marketing director, USA). Although the senior leader and the marketer are using different words to describe the idea of a university there appears to be common meaning. Both have conceptualised the university as more than a pathway to a better career. Rather, a place of higher learning, equipping students with a way of thinking that extends beyond vocational training.

As ratios, the academics referred to critic and conscience of society 3.4 times more than participants in marketing roles. Conversely, the marketers referred to preparing students for careers 2.8 times more than participants in either an academic or senior leadership role. In relation to countries, there was no significant variance identified between Australia, the UK and the USA. However, in China, only once did a participant offer a description of the idea of a university that involved academic freedom, and yet all of the participants in China offered responses that focused on preparing students for the workforce. I attributed this to context: the role, mission and brand of universities in China appears from the responses to be more

closely tied to employment outcomes than it is in the UK, the USA or Australia.

All of the responses from the participants in the USA demonstrated that the participants were concerned that some external stakeholders had constructed an idea of universities that had drifted towards a purpose focused on employment outcomes and, had shaped a view of universities as a source of human capital for industry and government. For example, a senior leader spoke about employer expectations of universities and its graduates. He stated emphatically:

Why did employers suddenly start complaining about this, what is this about? Is it because they just shut down all their in-house training operations? And now that they aren't training they say oh they're not ready. They were never ready coming out of college, but now it has a different slant of attention on it. (Interviewee A1, provost, USA)

An implication that could be interpreted from this quote is that employers have shaped a purpose for universities that is directly connected to preparing students for the workforce. Another participant, a senior leader, speaking about shifting expectations from employers and students, claimed that students now wanted more from their university education and said that they see "the credential in itself as important but they also want to know beyond that, what it's going to lead to for me" (Interviewee C1, vice-president, USA).

The participants in the UK were more concerned about the future than participants from the other countries. For example, there were 25% more occurrences of the codes sustainability, university values and university character in the UK than the USA, Australia and China. The UK had been undergoing considerable change with respect to the funding of university places and, according to some commentators, universities were just coming to terms with a changing marketplace for the recruitment of students (Adonis, 2017; Walker & Warrell, 2017). In addition, at about the same time as I was conducting my research, the vote for the UK to withdraw from the European Union (BREXIT) had just concluded. One

participant noted, “you know we have this BREXIT issue at the moment, and the concern for me is that the university sector was almost anonymous in the whole debate, and I can’t help wondering why that is” (Interviewee E3, acting vice-chancellor, UK).

There was mounting concern expressed by the UK participants about the potential impact on universities, especially in relation to European Union students who would no longer be treated as domestic fee-paying students. For example, a senior leader described BREXIT as “deplorable, but as universities, as academics, we can’t pull up the drawbridge” (Interviewee E3, acting vice-chancellor, UK). Another senior leader said, “we may see the well dry up from Europe so we need to find ways to cover that shortfall or we will all be in trouble” (Interviewee D1, vice-chancellor, UK). And, “I think it will be universities down the bottom of the pile [ranked lower in the league tables] that will really struggle to succeed, and I think we will over the next decade see some of them failing” (Interviewee D1, vice-chancellor, UK).

The concern, expressed often and emphatically by the participants in the UK was that while there was a necessity to market themselves, universities needed to be clear about their purpose, and therefore position their brands to more confidently withstand changes, new competition and challenges. A senior leader, speaking in response to a question about how the leadership of universities manages the demands of marketisation stated, “what I’m saying is that we’re in a world where the university needs to convey a set of benefits to the individuals that go beyond training them for the world of work” (Interviewee D1, vice-chancellor, UK). Another senior leader commented, “we need to balance the need to be effective business managers with our inherent responsibility to be custodians of our missions” (Interviewee D1, vice-chancellor, UK).

Milligan and Kennedy (2017), writing about the rise of micro credentials in the digital age, claimed that there is an emerging trend of employers seeking alternative qualifications - from institutions and organisations outside of the traditional university. For example, the Chief Executive of

the Australian Chamber of Industry and Commerce (ACCI) recently said, “our members are consistently telling us they’re seeing students come out of university or training programs and they might have the academic or theoretical skills but no skills to work. It makes them really hard to employ” (Burke, 2016, p.1). In the UK it has been reported that a major accounting firm had removed the requirement for a degree from new applicants (Cohen, 2019). Expanding on this emerging situation, Sharrock (2017) observed that employers in the digital era appear to be seeking out employees that come equipped with a new and different set of skills from the theoretical discipline that is valued in universities.

This trend appears to some of the participants to be impacting on enrolments at universities. One participant said, during a discussion about the changing demands from students in the higher education marketplace:

Right across Australia we are seeing decreasing enrolments in postgrad domestic programmes. Companies are finding cheaper and more efficient providers that are satisfying their needs more closely. What does that mean for us? Well, in my opinion we need to get creative, and realise that what worked before may not be the answer going forward.
(Interviewee J2, academic dean, Australia)

In China, there appeared from the responses to be an already established view that a university education is closely aligned with employer and student expectations about suitability for the workforce. In other words, brand image and brand identity may be more closely aligned than they are for universities in the UK, Australia and the USA. However it was unclear to me from the analysis of the participants’ responses whether this is due to political influences that seek to moderate the Western university’s traditional role as critic and conscience (Xiong, 2012; Zhang, 2017) or, that universities are seen as most useful as providers of human capital to industry. For example, a participant in a marketing role commented about the purpose for the university, “we are very aware of setting up our graduates for the workforce, this I think is our most important job” (Interviewee H3, Head of Promotions, China). Likewise, an academic remarked, “our mission is to build a better educated worker for the

betterment of China” (Interviewee H2, academic dean, China). It was quite challenging to obtain definitive responses from the participants in China. As I described earlier in this chapter, while participants were always polite and considered in providing responses, it was clear to me that the political influence was very strong.

While commenting on the frustrations that she had detected as universities attempt to communicate their brand identity, one senior leader claimed that the disconnect, or gap between the university’s brand identity (as constructed by universities) and the brand image (constructed from the shared experiences of external stakeholders) was becoming wider, and this was an issue that would need to be addressed in coming years:

On the one hand we have the university driving in a direction that is focused on research, new knowledge and improving global rankings. On the other, we have employers and various student groups seeking a value-for-money outcome for their higher education investment – jobs, career, professional development. This approach has the potential to cause tensions within the university system. How this plays out I’m not sure, but it isn’t going away so we need to deal with it somehow. (Interviewee E3, acting vice-chancellor, UK)

This quote employs a similar sentiment to that of O’Byrne and Bond (2014), where they observed that university managers, academics and students each potentially have a vision of the idea of the university that is in conflict with the others and, what might be needed is a new, composite model, a model that satisfies the demands of each group.

Academic tensions

The concern for many of the participants in academic roles was the evolution of a university framework that has moved well beyond the traditional idea of a university described earlier in this thesis. That is, committed to the ideals of academic freedom, the pursuit of knowledge and its role as the critic and conscience of society. Put another way, it appeared to these participants that the brand identity of universities is being challenged and shaped by external stakeholders, away from

traditional values. For example, an academic discussed the changing expectations of employers and government:

We are not degree factories. Our business, if you will, is to transform individual lives and to transport new knowledge into the world. As university leaders, we must strive to convince the general public that higher education is a common goal worthy of public investment. This is our grand challenge. This is our great hope. (Interviewee E2, academic dean, UK)

Another academic remarked, “some people are now saying we should turn ourselves into an institution that simply pushes through people that are trained to become engineers. No, we're there to enable people’s minds to think” (Interviewee B2, academic dean, USA).

This tension appeared to manifest with the academic participants, more so than with the marketers who, “accept that we are in a marketplace and we need to present a compelling offer” (Interviewee F1, Marketing Director, UK). However, even here there was evidence that the expectations of external stakeholders were not consistent with the marketers’ understanding of their universities brand identity. The frustrations with the expectations of external stakeholders, expectations that had extended beyond the traditional academic programme, were evident in the following comment:

If we focus on preparing a student for his or her first job, are we ignoring the likelihood that students will have many jobs over the course of a lifetime? How do we best prepare students to be lifelong learners and adapters, to be critical thinkers? (Interviewee B1, marketing director, USA)

Four of the six participants in the USA said that the emergence of massive open online courses (‘MOOCs’) and online education (to be discussed later in this chapter), had contributed to these changing expectations. Two of the participants claimed that this was because employers and students were increasingly able to find education opportunities online that satisfied their perceived needs for the workforce. And, often at lower cost than a traditional degree. In an interview with a senior leader, the participant drew

on his understanding of the traditional purpose of the university to question how these core values, founded in history, should prevail: “what do we lose in the college experience if we over rely on online-learning? How amenable are online-learning platforms and open-source badges to teaching in the arts and humanities, and to producing a well-rounded, well-educated citizenry?” (Interviewee C1, vice-president, USA)

While there was acknowledgment of the threat posed by online providers, the position of the participants in the USA tended towards reinforcing the traditional idea of a university education. It was inferred that they should not be following the lead of some external stakeholders to develop curriculum and programmes specifically designed to satisfy a vocational need. By probing further, it seemed that this may be due to a fear that, by engaging in these new markets, universities will be moving away from a mission that many of the participants believe deeply in. For example, a senior leader, while discussing the emergence of online providers, said that it was unlikely that his university would suffer too much from the new entrants that were attempting to satisfy a perceived market need that universities were not able to satisfy. This participant indicated that this trend might in fact be a fad:

I’m very suspicious of that to tell you the truth, because I think that the more generally educated student in the long run has a much stronger opportunity to provide leadership in a company and an organisation than do these people who walk off the street with an online certificate and start doing coding and whatever, just because they are just really smart people. (Interviewee A1, provost, USA)

In a similar way, a participant discussed universities embracing a vocational strategy:

Well no because it isn’t education for education sake, its vocational and I’m not totally convinced that’s where universities should be, despite it expanding our footprint. What if employers suddenly decided you don’t need a degree to get a job anymore? As a brand are we strong enough to withstand that? We need to be careful about being clear about what we stand for and it must be authentic, and

at the end of the day it needs to have a value. (Interviewee A2, marketing director, USA)

In the same vein, a marketing director said:

I've been doing research for this program that the President is doing on a television network. One of the shows is shaping the future of education. What I found very interesting was that moving forward, degrees are not going to count as much. It's not the credential, we are going to have to focus much more on knowledge to remain relevant. (Interviewee B1, marketing director, USA)

It seemed that the university system in Australia aligned closely with the UK and USA in terms of its understanding of values and mission. The participants suggested that this was causing some tension, not only within universities but, according to many of the participants, also with some key external stakeholders. For example, a participant, while discussing the changes that were apparent in the higher education marketplaces in Australia, expressed a view that captured the views of many participants about the evolving environment:

I'm saying there is a huge risk that the degree no longer matters with employers. It's already happening now. It doesn't even matter where you did your degree, it no longer matters. What matters is demonstrating to me as a prospective employer that you are proactive, that you're out there engaging, and willing to be innovative, and move things forward. Are universities the right place to get these skills? (Interviewee J2, academic dean, Australia)

An interpretation of the significance of this quote is that, because the emergence of employment/graduate outcomes appears to be more influential on brand image, the gap between the university's brand image and the university's brand identity may be widening. As a consequence, as one participant suggested, the student is "less concerned about the institution and more about access to a relevant programme" (Interviewee J3, marketing director, Australia).

The situation in China appeared to be evolving, and the views expressed by the participants there reflected an emerging understanding of the need for universities to embrace commercial strategies and yet remain

committed to the university's historical purpose. A senior leader noted, "the university is like a market house. From cell to cell, room to room. It is not uni-versity, it is not even a multi-versity, it is a diversity" (interviewee G1, vice-president, China). In a similar way, an academic at the same university stated, "the university needs to stay true to its purpose, but we also realise that it's a competition for the best students" (Interviewee G3, academic dean, China). In contrast, a senior leader at another university was more circumspect, remarking, "there is a certain political reality that we must be conscious of, and I would be concerned about any bravado suggesting otherwise" (Interviewee H1, president, China). This final comment was particularly interesting, as it closely aligned to the writings of He (2002), Xiong (2012) and Zhang (2017) described in Chapter 2, who spoke of a hybrid model for China, a model where academic freedom and the role of critic and conscience is more restricted than it is in countries such as the UK, Australia and the USA. However, if we go one step beyond the literature, it could be argued that universities in China are slowly evolving towards more Western models. The participants often referred to a desire to move up in the global rankings and, by doing so they recognised that embracing stronger internationalisation strategies, including partnering with Western universities, was necessary. This demonstrates an understanding from the participants that brand image is continuing to develop, and for universities in China there may be a need to review their brand identity and brand communications strategies to ensure they continue to align with reflected brand image.

It was apparent from the responses from China that the participants had readily accepted the role of provider of human capital. The desire to provide students with improved career prospects was a key part of the university mission, and by extension its brand identity. For example, a vice-president commented, "[we] try to put students in practice in business in different fields" and that "[we] focus a lot on application-oriented education" (Interviewee G1, vice-president, China).

This position was further explored by a participant, an academic speaking about why universities are important:

So, one of the main purposes of the university, we believe, is social service. So how much we can contribute to the society and provide services to the society. That's one of the purposes of the university. So, we believe for our graduates, the number one priority is finding a job, which is the basis for the rest of the things. Without finding a job, the public service, social services, these are talk without basis, without foundation. (Interviewee H2, academic dean, China)

However, I believed that in China it was what was not being said that was also important. It was apparent that in each of the interviews there was a marked reluctance from the participants to respond expansively to questions about branding and the idea of a university. The references to culture and history were often accompanied by closed and cautious body language, and only once did a participant suggest that the political situation in China was a factor influencing the mission and values of their university. In Chapter 3 it was noted from the literature that academic freedom is not a feature of the university construct in China. The position in China is complex with particular social, political and historical influences impacting on the way universities operate (He, 2002; Mok, 2016; Tran; 2017; Xiong, 2012; Zhang, 2017). The Chinese Government acknowledged the Western concept of academic freedom but stated that it has the right to decide what can be published within its borders (Tran, 2017).

Universities contributing to changing expectations

It is possible that the strategies and positions that universities themselves have undertaken has contributed to external stakeholders having shaped a brand image of universities that encompasses a set of expectations that were not consistent with the universities desired brand identity. The participants suggested that as universities have adapted to take advantage of the opportunities presented by marketisation and the knowledge economy, they may have interpreted their missions more liberally.

Despite misgivings about how universities should respond to new opportunities, for many of the participants in academic roles, there was a need for universities to embrace a degree of brand development and engage in marketing activities to sustain the university as a business. This was a commonly accepted view with the reference occurring 363 times in the interviews. However, beyond the quantum of the occurrences, this view was expressed either directly or indirectly in all of the interviews. For example, a participant said, “we are stretching the university mission to embrace more commercial objectives. That’s a reality, not a question” (Interviewee E2, academic dean, UK).

The participants in the USA and, to a lesser extent, the UK identified that they may be contributing to the changing expectations of universities by external stakeholders through the promotion of a spirit brand. In terms of the literature, the spirit brand is referenced by Bok (2003), when he speaks of the growth in the brands of universities engaged in high profile athletic programmes, and the much-needed commercial revenues that accompany these brands. Typically, the spirit brand manifests in an emotional connection through the student experience, as opposed to academic and research programmes (Bok, 2003). The spirit brand was prominent in the responses from the USA, with four of the participants referring to it specifically and, to a lesser extent, the UK where three of the participants spoke to aspects of the spirit brand but did not use the term. For example, according to one participant, spirit brands engage, connect and even bind the students and the alumni of the university to an underlying culture, or ethos, and “this is an important factor in fundraising strategies and student retention” (Interviewee A1, provost, USA).

Although a specific question about the spirit brand was not asked, it was raised by the participants in the USA and the UK in the context of questions concerning prestige and questions concerning marketisation. The code for the spirit brand was identified 86 times in the USA, 21 times in the UK, once in Australia and not at all in China.

The first reference to the spirit brand in this study emerged in an interview conducted in the USA with a senior leader. In response to a question about prestige, the subsequent discussion involved the participant making a comparison between his current university and the university he was previously employed with. In this context he lamented the lack of a student school spirit, at least compared to his previous experience:

You may have been wooed to attend the school by the master brand, but you often graduate with a stronger affinity to the spirit brand. That's the brand you carry forward. It's why, when institutions change their mascot there's some uprising from the alumni. That's the part of the brand they align most to. (Interviewee A1, provost, USA)

The spirit brand was also discussed by some of the participants in the UK, although it tended to feature in colleges, or residences that formed part of the university campus, rather than athletics as it did in the USA. These colleges were often steeped in historical tradition and, it was stated by a participant that in market research conducted by his university, there appeared to be a stronger sense of belonging and engagement with these college brands than to the traditional university masthead. This was further demonstrated in an interview with a senior leader who commented during a conversation about the existence, or otherwise, of sub-brands in the university:

On the other hand we've these colleges that have fostered their own distinctive identity, ethos, and they have their own traditions. Certainly, when our students are inducted into the University, you know the college is really fundamental, I'd say. So, I could argue that in this university that having colleges actually strengthens our brand. (Interviewee E3, acting vice-chancellor, UK)

I was intrigued by the notion of the spirit brand, especially as it was a concept that I was aware of in my role as a senior executive in a university, but from my experience it had little influence in the systems of Australia and New Zealand where I had been employed. The significance of the spirit brand is that universities appear to be encouraging students, alumni and other affiliated groups to construct a brand image that goes beyond the traditional understanding of it as an institution of academic

learning and the critic and conscience of society. In effect, the promotion of the spirit brand is contributing to the shaping of brand image, which may or may not be aligned to desired brand identity.

These spirit brands appeared from the responses to be a source of tension in universities. In the USA, there was an initial reluctance by the participants to discuss the influence of the spirit brand and, in two interviews, there was an effort on the part of the participants to play down the significance. For instance, a senior leader, while acknowledging that the spirit brand is a part of the university, expressed the view, "it's nice to have these other things, but it is much more thought of as an academic institution" (Interviewee A1, provost, USA). However, as the discussion continued it was apparent that the spirit brand was significant, demonstrated by the existence of over 100 retail outlets worldwide that existed with the primary aim of selling branded merchandise, items marked with only the affiliated spirit brand. In response, the same participant conceded, "it is not that it's unimportant, but it isn't why we are here" (Interviewee A1, provost, USA). In the same way, the Marketing Director of the same university commented:

I think athletics is very important from an alumni perspective. You are selling tickets, you are getting exposure, you're getting press. If you're on the upswing and your sports are doing really well, people are all on board, it gets them jazzed, it gets them energised. It's one of the few things that happens here that you get an emotional type of rise from. (Interviewee A2, marketing director, USA)

This participant subsequently qualified his response by adding, "that said, we've been doing some brand studies with key alumni, and they do not prioritise it nearly as high as we thought" (Interviewee A2, marketing director, USA).

The growing obsession that universities have with global institutional rankings may also be a factor in universities contributing to changing expectations.

Notwithstanding the somewhat polarising opinions in the academic literature about rankings and their methodologies (Hazelkorn, 2017; Marginson, 2013; Peters, 2017), rankings as a topic was discussed widely during the interviews, with a diverse range of views across roles and country. In China, rankings were considered by all of the participants to be extremely important, and here I connect the unique cultural perspectives described in Chapter 2 with a desire for increased prestige as a driver for universities in China to proactively pursue strategies to improve their standing, particularly relative to Western universities. For example, an academic emphasised the importance in China of gaining additional prestige and, demonstrating the gains by surpassing well known universities in the USA:

So rankings have become extremely important. I think it was Tsinghua that beat one of the top universities, the American universities, into the top 20. And it was national news. Because by getting ranked in the Western rankings, then the prestige just goes up 10-fold [in China]. (Interviewee G3, academic dean, China)

In the USA, Australia and the UK the emphasis by the participants on rankings tended to be relative to their university's position on the various (and many) rankings tables. For example, the participants from universities at the upper echelon of rankings (top third in the league tables), while all largely dismissive of the methodologies employed, considered them a "necessary evil" (Interviewee D1, vice-chancellor, UK) and, important to how external stakeholders evaluated the performance of universities. A senior leader commented, "I've been in higher education my entire life and I look at the data and my eyes glaze over. What am I supposed to do with this?" (Interviewee A1, provost, USA). At the same university, a marketing director expressed caution about the marketability of the rankings results, noting, "God giveth and God can taketh away. They can redo that methodology and you slide the other way. That's some of the BS of the rankings" (Interviewee A2, marketing director, USA). In contrast, an academic dean at a university that was not so highly ranked remarked, "we don't play that game, the students and staff come here for a different reason I think" (Interviewee B2, academic dean, USA).

If we accept that brand experience is an evolving relationship constructed through the experiences that a customer or group of customers has whenever they connect with that brand, then the responses suggest that there is a clear nexus between mission and brand. That is, brand is a strategic asset that must be maintained, enhanced and even sold (Aaker, 2014; Holt, 2002; Keller & Lehmann, 2004). That the participants reported a stretching of the university's mission to embrace commercial objectives suggests that universities may face a strategic challenge should they seek to stretch their brand identities to more closely align with brand image. Of course, it is not necessarily the case that universities will seek to stretch their brands, with many of the participants in academic roles preferring that universities stay true to their traditional purpose.

That some key external stakeholders have constructed a different purpose for universities is supported by the responses from many of the participants. However, this disparity in expectations may at least partially be as a result of the strategies implemented by universities themselves as they embrace marketisation opportunities. Therefore, universities may be contributing to the creation of a disparity between the brand identity construct and the brand image construct by conveying a set of benefits that extends beyond the traditional understanding of a university as a place of learning. The next section focuses on the fourth of the themes to be discussed in this chapter – digital disruption. This is a theme that has the potential to further complicate the situation for senior leadership as universities construct their brand identities in the future.

Digital disruption

The authenticity required by digital disruption was a theme that emerged from the interviews. Digital disruption was defined earlier in Chapter 3 as the changes enabled by digital technologies that occur at a pace, and magnitude, that disrupt established ways of value creation, social interactions, doing business, and more generally our thinking. These pressures, both positive and threatening, are described as digital disruption (Edelman, 2010; Garman, 2014). Importantly, the name itself is

potentially misleading in that digital disruption is not disruptive innovation. Rather it is a potential catalyst, or an enabler, that can lead to disruptive innovation (Christensen & Bower, 1995; Vermeulen, 2017). The challenges posed by digital disruption arose during discussions with the participants about how universities develop and communicate their brand identities or, in response to a specific question that was asked about how digital disruption is impacting on universities. For the participants in marketing roles this discussion also involved the apparent need for universities to substantiate claims and promises that had not previously been subject to detailed scrutiny. Put another way, digital disruption has the potential to expose a lack of authenticity and, for universities this appears from the responses to pose unforeseen challenges.

Five of the participants in marketing roles specifically identified that the authenticity required by digital disruption was a challenge for universities as they communicated their brands. However, as the data was analysed more carefully to identify and examine any underlying meanings, the descriptions that I had attributed to codes such as digital authenticity, brand authenticity and digital contained meanings that conveyed digital disruption. Therefore, a further six participants that had, perhaps inadvertently, referenced aspects of digital disruption were identified. The concern expressed by the participants was that universities might need to substantiate claims and promises that had not previously been subject to scrutiny. For example, a participant remarked, “that doesn't mean those assertions are wrong, it just means they aren't questioned” (Interviewee A1, provost, USA).

During the interviews a question was asked of all participants that was specific to digital disruption. The subsequent discussion focused on how they thought digital disruption is impacting on their institution, and universities more generally. And, if digital disruption was impacting their institution, how were they seeking to manage it? Given the nature of digital disruption the responses were, not surprisingly, more substantial and the discussion flowed more freely from the participants in marketing roles. For example, occurrences of the codes digital, authenticity, digital authenticity,

substantiation, brand authenticity, authenticity, experiences and content were significantly larger for participants in marketing roles (448) compared to participants in academic roles (241), and participants in senior leadership roles (197).

Despite the quantum of the occurrences, the nature of them was particularly relevant and, it was not uncommon for participants who were not in a marketing role to defer this question to the participant who was in the marketing role. To illustrate the point, an academic noted:

In terms of our online presence, in terms of delivering courses, we have lagged behind some of our competitors in that, quite significantly. But in terms of the digital marketing side, you're going to get that better from our marketing director than me. (Interviewee F2, academic dean, UK)

In response to 'how has the emergence of digital disruption impacted on institutions?' Many of the participants referred to homogenous higher education communications; the increase in the communications channels that students expected the university to engage with; and, the newfound ability for students to express their opinions about all aspects of the student experience through social media and online platforms - and almost always without any form of moderation. A participant remarked, "it's a never-ending job to identify channels and platforms to engage with students. Sometimes it feels like when they think we have found them that's the time to move to a different one" (Interviewee J3, marketing director, Australia).

The question about digital disruption often led to a discussion about authenticity, although once again authenticity was more readily discussed with the participants in marketing roles where this was a more familiar concept than it was for other participants. One participant noted, "all [digital engagement] is based off of truth and what we've learned and what we've heard. Based on authentic conversations" (Interviewee A2, marketing director, USA). Similarly, a participant, speaking about the risks of openly engaging with students in social media contended, "it's so important that we actually are authentic, and you know if we are doing the

job that we think that we're doing then we shouldn't be scared of it"
(Interviewee F1, marketing director, UK).

The idea is that there is likely to be greater expectation on universities in the future to present an authentic brand position that can be substantiated. In relation to the research questions for this study, there are likely to be implications from the authenticity required by digital disruption in how universities construct their brands. The rationale is that the university, like any other organisation, is now a more transparent entity, where external stakeholders can more easily see inside and examine its inner workings. As a result, the promises and assertions that form the basis for the communication of their brand identities are more closely scrutinised for evidence, or substantiation (Edelman, 2010; Mattin, 2017). The reflected brand image appears to be less determined by university claims (brand identity), but rather through stakeholders' shared experiences. Somewhat surprisingly, given the reluctance of the participants in China to discuss brand and marketing as an influence on universities, the following quote was made by a president as she spoke about the role of marketing in her university:

Marketing is not about what we say about us, but what others say about us, and we especially see that in social media. We need to have external opinions from graduates, employers and the like. That is a better way of selling our brand, instead of we ourselves talking about ourselves.
(Interviewee H1, president, China)

As described earlier in this section, authenticity was an issue that was well understood by those participants in marketing roles and, there was a sense from the responses that digital disruption was a real phenomenon that universities either are, or should be, embracing. One marketing director responded to a question about the impact of digital disruption on their university as follows:

In terms of digital, if you know who you are, and you know what your position is, what you have been, what you want to be, and it's that centre point, that is something that is a really good thing. That should act as your guiding light in making decisions as you move forward throughout almost everything

you do. Authenticity is key, whether it's digital or otherwise.
(Interviewee A2, marketing director, USA)

Many of the participants reported that the rapid growth in digital technologies had created many new media channels for universities to engage with their various stakeholders, and with it some challenges for universities to manage. For example, a marketing director noted that digital technologies, in particular social media platforms, marketing automation tools and blog/review websites, were requiring a higher level of authenticity. This meant:

There's actually more pressure on us to live those values and to ensure that we are constantly communicating with the exact situation, because if we're not and we don't, then it's going to get that kind of negative feedback, and it's just all encompassing. (Interviewee F1, marketing director, UK)

Likewise, another participant stated, "well, digital allows us to authentically engage, it's what you might call marketing but we call it conversation. It's important, and we are, and need to be, very effective in the social media space" (Interviewee G2, university relations, China). A participant in a marketing role spoke to how digital disruption was changing expectations of marketing and, making marketers more accountable for their activities, remarking, "I think that we're all called to a better standard than that now, especially with the digital approach that you go to market with, the more shot you have at measuring activity" (Interviewee B1, marketing director, USA).

Another participant was wary of the impact of social media on the brand image. She suggested:

I think that there's a real fear about what happens if it starts to explode. The answer is you get out there and set an expectation to engage, and then you don't say anything or you don't address it. I think that there's a total lack of not being in control. A fear of not being in control. (Interviewee C2, academic dean, USA)

Control and trust was also an issue for another marketing director and she

noted, “there’s got to be a confidence level, I can deal with whatever comes in my way, and be honest about it” (Interviewee K2, marketing director, Australia).

In the same way, there was agreement by many of the participants about the need for universities to substantiate promises and claims in social media. A participant remarked, “the brand has to be linked very clearly to those guiding overarching principles, strategies to help guide consistent decision making. I would argue that’s not as transparent in many of the universities I’ve been to” (Interviewee J2, academic dean, USA). Another participant said:

I think from a marketing standpoint we have done a lot more in recent years to invite transparency, a lot more space online where students can interact with other students and get that one on one reality check if you will. (Interviewee C1, vice-president, USA)

One participant expressed his uncertainty about universities being able to substantiate their brand identities: “the problem for us is that we can’t be authentic in digital mediums with any degree of real confidence, the experience is so variable” (Interviewee E1, marketing director, UK).

The perspective in China was interesting in that, as I reported earlier in this chapter, marketing is not a word that the participants were comfortable with. Despite this, it was suggested by the participants in marketing roles that social media platforms were a powerful way to engage with prospects and their influencers:

I think it is easier for us to use digital platforms and social media than it is for us to advertise. We can have a conversation and it becomes an extension of our face-to-face recruitment that is so important here. (Interviewee K2, marketing director, China)

One interpretation of the responses from the participants in China is that universities may continue to evolve towards a more Western model, as the forces of globalisation accentuate and influence strategies by Chinese universities to enhance legitimacy. However, another interpretation is that

this may be the means by which universities in China can circumvent the reluctance of their leadership to be seen as employing traditional marketing tactics such as advertising.

Several participants in this study focused on the idea that digital disruption had the potential to uncover inconsistencies between the promises contained in brand communications and the experience of customers. In other words, the disparity between the brand identity construct and the brand image construct was more apparent under a digital lens. For example:

So they [customers] tolerate us because we are a highly ranked university, and then overall our brand becomes a part of their personal brand and I think that they are very forgiving. But I still don't think that's an excuse for poor service. (Interviewee J3, marketing director, Australia)

And:

We might be leading the way when it comes to advertising, but we are certainly needing to make some significant improvements in other areas and we are doing that but, I think that it's hard to find a burning platform here, I think there's a bit of apathy. (Interviewee K2, marketing director, Australia)

In the same way, a senior leader discussed the student journey and the impact of digital disruption. She identified that there was a considerable risk to her university in not providing “a culture around your digital infrastructure”. She then provided a comprehensive example of where that risk became a reality for her university:

You can watch a student talk about getting their offer, someone's on Twitter, you can see them talking, you can feel the excitement and, then all of a sudden, they are trying to enrol in their classes, the server's down. They call it hunger games, because everyone jumps on the system at the same time, fighting to get into classes, it all crashes. They channel all their messages back on us, as they are trying to experience that. They've grown up, they are digital natives, they've grown up with stuff that works, and all the other things in their life works, all the other brands are able to manage their digital experience. We should too! (Interviewee K3, Assistant vice-chancellor, Australia)

The quote above is an example of how the meaning expressed by this participant could be interpreted as being connected to digital disruption. Although this participant did not refer specifically to 'digital disruption', the reference to digital experience equating to brand experience is consistent with Garman (2014) and Edelman's (2010) explanation of the term.

Extending the idea that digital disruption could uncover inconsistencies between the experience of 'consumers' and the universities assertions, a participant in a marketing role noted, "we are all more exposed to the world now, warts and all" (Interviewee E1, marketing director, UK). Another participant in a senior leadership role said, "at our place we look much more carefully at what we are saying, questioning ourselves more than we used to" (Interviewee C1, vice-president, USA).

And yet, the participants were not unanimous in relation to their views about the potential impact on university brands and brand communications from digital disruption. One participant acknowledged the influence of digital marketing strategy but she called for a greater balance and not to dismiss conventional marketing methods: "I say yes, digital first, but not digital only. I worry about chasing the latest trend down a rabbit hole without thinking". This participant was also not convinced that authenticity necessarily linked to providing evidence to support claims:

It might sound naïve, but I think they're [university promises] very sustainable. I think that the average consumer who you're trying to influence with those promises is not looking necessarily for data to support that. You could say 'we're a very global university' and no one will question that.
(Interviewee B1, marketing director, USA)

In the same way, an academic did not believe that students would actually go as far as to proactively seek to hurt the reputation of a university through social media:

I just don't see that kind of interaction generally, in social media and things. I don't think there's that common ground there that students would react to something like that. They would react to something specific like some incident that

happened on campus perhaps, and maybe it was handled badly. That's the kind of social media backlash that you're going to get. In terms of general information, general claims, I don't think you get the feedback like that in any form, digitally, except maybe those formal review sites. (Interviewee B2, academic dean, USA)

Some participants were quick to dismiss the threat of digital disruption. For example, a senior leader was quite cynical about the real impact of digital disruption. He said that his university is world leading and "largely resilient to market forces" and, "I'm not sure the digital world is actually going to change things much. Students enrol, they study, they graduate - the cycle is the cycle. For me digital is just another way for us to communicate" (Interviewee J1, deputy vice-chancellor, Australia).

Several participants observed that there appeared to be a corresponding shift in the collateral, or marketing materials, that universities were producing to attract students. For example:

Balance between printed materials and development of a web presence - and are they in fact complementary. What are some of the things that you should be doing with your print materials that you wouldn't want to do on the web, and vice versa, and the question that comes up quite routinely is how much print do you need? (Interviewee C2, academic dean, USA)

Another participant commented, "really what we need to do is kind of flip here at this moment in time where we're spending about eighty percent on advertising and about twenty percent on content creation - really should go the other way" (Interviewee F1, marketing director, UK). In a similar way, a participant in a senior leadership role stated:

The bottom line is that we have shaved back on that front pretty significantly but we have not eliminated it, it still plays a role in driving parents and kids to events and informing, particularly parents, of the academic and social options here. (Interviewee C1, vice-president, USA)

The message that emerged from the responses was that, while digital technologies are shaping the way universities are marketing to students, it

is not a case of either/or when it comes to digital and traditional methods, but rather and/and.

The question about digital disruption sometimes led to a discussion about how digital technologies, and specifically social media, were being used by universities. It appeared from the responses that social media was primarily used as an engagement tool and, there was some caution expressed about its relevance as an advertising tool. For example, a marketing director outlined a particular problem, and how she would go about providing a solution in the current environment where digital disruption is impacting on how brands engage with stakeholders:

If we had a recruitment problem, would I throw all my money at brand advertising to solve that, or would I think of relationship building and how we nurture individuals, understand their needs, give them a sense that we care, that we have a solution for them, giving them confidence that they will be successful with us? (Interviewee J3, marketing director, Australia)

Later in the interview, she said:

I think that, to be honest, a lot of students block us out because they are just getting blasted by messages from universities and, being personalised with them is probably going to be the strategy that will win us the day. (Interviewee J3, marketing director, Australia)

In a similar way, an academic spoke about how his university engages with students: “I mean it plays an extremely important role, but primarily as an engagement medium - China lives off social media” (Interviewee G3, academic dean, China). There was a similar sentiment expressed by two other participants. For example, a marketing director explained her approach to social media was largely an engagement one, noting, “I think the opportunity, from a content-based strategy perspective, is for us to drive really rich authentic engagement with our audiences, sending out content that's actually relevant to people rather than just white noise or wallpaper clutter” (Interviewee B1, marketing director, USA).

However, it was notable that the participants in the UK were less focused on using social media as an engagement tool. Rather, the participants seemed to suggest that adapting traditional marketing strategies to promotion on social media channels was the preferred approach. For instance, one participant in a marketing role noted that they were “late to the party” with respect to adopting digital strategies and, “I think it’s having a major impact on university brands. In fact, when we talk advertising campaigns here it is digital first” (interviewee E1, marketing director, UK). Likewise, a senior academic said, “pushing our advertising into digital channels is the trend here now, much easier to measure return on investment” (Interviewee E2, academic dean, UK). This is not an approach supported by the literature. Some writers have claimed that the online brand experience is not simply a direct translation from the offline experience and therefore applying traditional communications methods to the online experience is not desirable (Booth & Matic, 2011; Edelman, 2010; Limba, Kiskis & Jurkute, 2014).

Digital disruption refers to the emergence of new ways for consumers to interact and engage with brands, such as social media platforms and review/blog websites. The rapid expansion in connectivity and, the availability of information, is presenting consumers with greater influence over an organisation’s brand (Edelman, 2010). In other words, the brand image is determined less by a company’s assertions about its brand identity than it is about a customer’s shared experiences. Overall, the responses from some of the participants appeared to support the idea that digital disruption poses a strategic challenge for their universities as they construct their brand identities, albeit that there was a variance between those in marketing roles and those in academic roles about the scale of the challenge.

It appeared from the responses that, as digital technologies continue to evolve and innovate, pressure on institutions increases, brand image becomes more important, and the challenges of managing brand in universities may become more challenging. Given the strategic nature of brand, this may in turn pose challenges for senior leadership as they seek

consensus about future brand positioning and endorse future brand communications strategies. This may also mean that the current brand strategy adopted by most universities, whereby the university makes generic and largely unsubstantiated claims and assertions about itself as it communicates its brand identity, is likely to come under considerable pressure. The new level of authenticity required by digital disruption may take us a step beyond the current literature that describes university branding strategy as isomorphic, an established strategy of universities as they seek ways to enhance legitimacy (Chapleo, 2011; Donoghue, 2008; Mampaey, Huisman & Seeber, 2015; Toma, 2012; Wexler, 2016).

The next section in this chapter discusses the theme personalised education. The emergence of personalised education may be an outcome of both the changing expectations that at least some of its key external stakeholders have constructed for the university, the perceived decline in the value of the credential and, digital disruption. Put another way, digital disruption has created an environment where online education has emerged as a potential disruptive threat for higher education providers. In relation to university branding, if the resultant brand image of universities, formed by the shared experiences of consumers of higher education, no longer satisfies their demands, then the participants have suggested that there is a risk that the brand identities of universities may become less relevant to these consumers as they make their higher education choices.

Personalised education

The fifth of the themes to be discussed in this chapter is personalised education. Six of the participants in the UK, Australia and the USA believed that the relatively recent emergence of personalised education was a challenge for universities to respond to. Personalised education was described by the participants in this research as a tailored programme that specifically meets the needs of the student, a need that is increasingly shaped by the needs of employers. In other words, personalised education is a step beyond tailored programmes because it is intended to satisfy the needs of the student. To illustrate, a participant explained, “well we seem to have shifted from trying to develop tailored programmes for employers

to tailored programmes for individual students. Massive resource implications. Trend or fad – hopefully a fad.” (Interviewee J2, academic dean, Australia).

Following a closer analysis of the data, five other participants had described personalised education, but had done so using different language. For instance, the notion of personalised learning was touched on in the context of discussing ‘micro credentials’, ‘executive education’ and ‘chunked programmes’. The opinion expressed by some of the participants was that personalised education might become the preferred tertiary education choice for students and this would result in universities having to review their business models and their brand identities. In a similar way to the diminution in the value of the credential and changing expectations, discussed earlier in this chapter, several of the participants expressed frustration about how the more holistic value of a university education was increasingly being shaped by external stakeholders seeking immediate employment outcomes. In turn, for some of the participants, this was causing concern inside universities about whether their university might be able to respond in a manner that would satisfy the changing demands of students and employers.

While the increase in personalised education ‘product’ does not appear from the responses to be necessarily dependent on the rapid improvements in technology described as digital disruption, there is some evidence that it may have sped up its impact. One participant claimed, “the internet just makes these type of programmes [online programmes] much more accessible than ever before and, without the costs associated with running a campus, the new players are thriving” (Interviewee A1, provost, USA).

A concern expressed by the 11 participants that engaged with this issue seemed to have a particular focus on postgraduate education, where the primary purpose is career advancement. The participants indicated that traditional bachelor degrees, while potentially affected, may be more resilient to the threat because there is a greater argument for this type of

study to be regarded as core education. In contrast, postgraduate education is seen as more specific to vocational and professional development. For example, the following quote was obtained during a discussion about the future challenges for universities:

So, you haven't got time to do an MBA and you haven't got time to do a full-on certificate, so you ring these private providers who will customise a program for you and do it in two weeks and bring in a bunch of online material with some face to face sort of stuff, so you get this blended sort of approach, but it's totally personalised to your needs. And commercial companies are doing that now. And I see that as a big threat in this marketplace. From a marketing point of view personalisation, that's what differentiates, that's what allows you to charge higher prices or premium prices. (Interviewee J2, academic dean, Australia)

This response may also be attributable to the current funding models in the UK, the USA and Australia (discussed in Chapter 2), where government subsidises (at varying levels) domestic undergraduate study which makes it difficult for private providers to compete against more established State funded universities.

In a discussion about the apparent desire by employers for tailored programmes that satisfy their organisations' needs, a participant questioned, "we are being asked to effectively convert higher education into job ready products that better match what students learn, with what employers need. Can we do that?" (Interviewee B1, marketing director, USA). Although universities have previously responded to the needs of the professions to provide more vocational styled programmes, personalised education has the potential to fundamentally change the way in which programmes are created and delivered. This would appear to be a significant challenge for universities as they construct their brand identities as the traditional methods of teaching, disseminating and accrediting knowledge attainment may be under pressure. This situation presents us with an environment that more closely resembles a commercial organisation, retailing higher education 'products' with a focus on tailoring programmes to meet the demands of their customers - employers and students (O'Byrne & Bond, 2014). During a discussion about the impact of

digital disruption, a senior leader noted that new providers were taking advantage of improved digital technologies. He made the following observation about the trend towards shorter, and more vocational focused programmes:

We are well aware that there is a trend, in terms of a worrying trend towards micro credentials and smaller components of study designed for the individual. It's not a huge trend at the moment even if people are talking about it. Is a whole degree worth it? So, we are watching this because as a research-intensive university, as one that's got lots of professional fields of study and as a university that created a unique model, which is effectively a longer haul, we've got a big commercial investment in hanging on to the notion of the whole degree and the notion of a holistic graduate. (Interviewee K1, vice-chancellor, Australia)

This participant concluded:

We are not silly enough to imagine that the world isn't going to change, but we want to hold on to what we value, we also want to position ourselves to do well. Do we need to get more serious about micro credentials and badging? Yes probably. (Interviewee K1, vice-chancellor, Australia)

That universities should be responding to the challenges posed by delivering tailored programmes and personalised education was not without its opponents. During a discussion about the demands and pressures experienced from employers, a participant stated, "you know, studying in university isn't just about making yourself ready for the job market. It's actually about something more than that. It's going back to the previous set of values" (Interviewee D1, vice-chancellor, UK).

It appeared from the responses that some of the participants recognised that universities will need to innovate and develop online programmes to remain competitive. For instance, a participant spoke of recent initiatives to "launch our own online portfolio last year for the first time, kind of online distance learning programs, not an area the university has ever invested in before" (Interviewee F1, marketing director, UK). An interpretation of this comment is that there is recognition of the threat and, a subsequent need

to find ways to compete with the proliferation of new providers that had entered their market.

However, the caveat expressed by one of the participants was that, “mere access to online education is not sufficient to satisfy the consumer’s need” (interviewee F2, academic dean, UK). In addition, one vice-chancellor, recognising the brand risk to his university cautioned, “there are significant risks attached to us setting up an online business, will it help or hinder our reputation? I’m not sure, I guess it depends on how good it is” (Interviewee D1, vice-chancellor, UK). This highlights an important distinction. The new entrants are communicating brand identities that differentiate from universities by offering a flexible, more affordable and tailored product, not simply a comparable product made available online.

To further illustrate this point. Massive online open courses (MOOCs) were discussed by participants during discussions about the future for tertiary education. While MOOCs are a response from universities to a perceived demand for new market for knowledge from a vast digital marketplace (Sadera, 2014), they are not an example of personalised education, nor are they an example of tailored programmes. Rather, MOOCs are an innovation that is a continuation of how universities across the world have offered online programmes for many years, most of which feature blended, or hybrid, learning models (Shumar & Wright, 2016). For one participant, MOOCs were not a positive development in terms of shaping brand image and, not in keeping with the university’s desired brand identity: “the problem with MOOCs is that they are just essentially applied teaching and there is no university in it, no research, no engagement, no collaboration, no insights” (Interviewee J2, academic dean, Australia). In another example, a senior leader offered the opinion that there was a brand risk to more established universities because, “a consumer of the MOOC could do so without any real engagement with the university, and therefore a poor online experience would necessarily reflect on the host’s brand” (Interviewee J1, deputy vice-chancellor, Australia).

The responses from some of the participants about MOOCs indicated that the resultant shaping of the brand image construct may not be consistent with the university's desired brand identity. In other words, the broader student experience that Sevier (2011) speaks of, which is offered to enrolled students, would not be enjoyed by MOOC students and therefore there is the potential for a further gap between brand identity and brand image (Temporal, 2002).

In China, the model where students typically come to campus and receive a traditional university education where the "outcome is better career prospects" (Interviewee H1, president, China), is the established method and there does not appear to be any evidence from the responses in China of tension about a threat to that model. Overall, I did not detect from the responses in China that there was any concern, and therefore any investment, by universities in developing programmes to cater for a market seeking tailored or personalised education programmes.

In response to a question about what was important for universities of the future, nine of the participants identified factors such as reputation, student experience, and access to support and academic services. A participant claimed that the risk for universities seems to be that these values are "no longer a factor when making higher education decisions, and then the underlying promise is compromised" (Interviewee E1, marketing director, UK). This outcome may pose issues for the construction of the university's brand identity, in that the brand is no longer desired by its customers. In contrast, six of the participants believed that it is unclear whether online providers will be able to deliver the required outcome for a consumer, even a non-consumer, of higher education and therefore this might still be a key point of difference for universities in the future. This quote captured the sentiment of these participants:

What I'm saying is that we're in a world where the university needs to convey a set of benefits to the individual. Benefits that go beyond training them for the world of work, and benefits that are unique to the university and which cannot be so easily replicated by online providers. (Interviewee K2, marketing director, Australia)

The responses from these participants suggested that, rather than questioning how important these factors will be in the future, the sector needed to “stay true to the things we hold as valuable to a university education and not waver in the face of new challengers” (Interviewee D1, vice-chancellor, UK).

However, if the perception that the value of the credential continues to be eroded, it seemed inevitable to many of the participants that there will also be consequences for the traditional qualifications offered by universities. The implications for university brands are potentially significant. If the market is requiring a different type of product from the traditional programmes offered by universities then they may be faced with considerable challenges. Can they adapt their business models to more closely align with market demands, and therefore reshape their brand identity? Or, will the traditionalist, a strong voice amongst the participants in this study, prevail and universities will continue to reinforce traditional values – knowledge for knowledge’s sake?

A focus on short courses and the development of programmes to cater for new market demands may be difficult for universities, especially if the professional fields that the participants referred to in the findings change their accreditation requirements. According to Craig (2015), universities, particularly in the USA, are focused on the four R’s – research, rankings, real estate and rah (sport/student experience) and this comes with high costs, arguably at the expense of curricula designed for the workplace. Craig’s (2015) recommendations for what higher education institutions need to do in order to prepare for this challenge include; incorporating job competencies in curriculum; building substantive relationships with employers; and, being led by university presidents and vice-chancellors who are willing to be innovative.

Based on the responses from the participants, the question that arose from this analysis was just how important is it for the new providers to deliver on the traditional, and generally understood, suite of programmes

and services that universities have identified as being important to consumers of higher education, and therefore core to their brand identities? The consensus amongst some of the participants was that the new providers are seeking to satisfy the demands of a market segment that may not require the traditional 'product' offered by universities. Therefore, it may not be important for these new disruptive providers to deliver the same experience as traditional universities. It could be argued that the future for universities is likely to involve further change as the markets that they engage with are impacted by disruptive new players.

Disruptive Innovation

The final theme to be discussed in this chapter is disruptive innovation. Christensen (1997) defined disruptive innovation as having occurred when a disruptive product targets a market that previously could not be served (a new-market disruption) or it offers a simpler, cheaper or more convenient alternative to an existing product (a low-end disruption). In other words, the main objective of disruptive innovation is not to deliver the best performance, product or service to current customers, it is to deliver products or services to a market by the introduction of other, generally unforeseen, perhaps even unanticipated benefits (Christensen, 1997; Markides & Geroski, 2005).

However, the application of the disruptive innovation is sometimes misunderstood and Christensen, Raynor and McDonald (2015) caution that, "the theory's core concepts have been widely misunderstood and its basic tenets frequently misapplied" (p.2). For disruption to have occurred, "the trajectory of improvement will have intersected with the needs of the mainstream market" (Christensen & Bower, 1995, p.45). In brand parlance, disruptive innovation requires established or mainstream organisations to reconsider their brand strategies in the light of new providers effectively servicing their traditional markets. In response, an organisation may seek to stretch its brand identity to encompass new ways of doing business, it may discard brand identity and seek a new brand position that satisfies the market. Or, the organisation may stay true to its established brand identity and not evolve (Christensen, Raynor &

McDonald, 2015).

A few of the participants suggested that the purpose of the university, a concept reported by the participants to be core to the brand identity of universities, is being threatened by the emergence of new providers. The emergence of digital disruption has acted as a catalyst for new providers to develop new 'product' that aims to satisfy new markets for higher education, markets that established providers (such as universities) have either overlooked or exceeded their needs (Christensen, Raynor & McDonald, 2015). The corresponding decline in the value of the university credential that the participants reported may enable the new providers to challenge the established providers (universities) and claim market share away from them.

In the analysis of the responses, I detected evidence that disruptive innovation was a concern to a small number of the participants. Only four participants specifically referred to disruptive innovation however, a deeper, latent approach that explored the underlying meaning of the responses suggested that some of the academic participants were concerned about the increasing accessibility to, and quality of, online programmes across the world. For example, one participant commented that there is now a "proliferation of online product flooding the internet, some good, some bad, but look hard enough and there is something there for just about everyone" (Interviewee J2, academic dean, Australia). This participant continued later in the interview and said, "that for me is a big change. That's for me creating a new marketplace".

The first reference to disruptive innovation came about during my first interview. The participant made an argument suggesting that disruptive innovation may not apply to universities. This was an interview with a senior leader and the reference came about during a discussion about how universities may need to adapt in order to remain relevant. He suggested that, while being a supporter of the concept, Christensen and Bower's (1995) disruptive innovation may not be relevant to the university sector:

I read Clayton Christensen early on and I thought this is brilliant. I think though that the sort of life cycle of universities is so different, their products take so long to produce that they can't be quickly undermined in the way a manufacturing company can. Like the steel industry he talks about. I mean, at universities it is so long before students emerge and you know what they're doing and that sort of thing. Can they be as quickly disrupted, I'm not sure. (Interviewee A1, provost, USA)

However, in the previous section I reported that, for many of the participants, there was a disruptive threat and this threat appeared to be the proliferation of new online providers and their new online products. This threat had appeared at the same time as the other interrelated challenges discussed in this chapter were becoming known and discussed; the diminution in the value of the credential; changing expectations about the purpose of the university; the emergence of digital disruption and the desire from students for more personalised education products. The responses suggested that the new providers were attempting to satisfy a demand that the established universities (the incumbents) were unable to meet. Comments such as “innovators are making inroads into our mainstream markets” (Interviewee J1, deputy vice-chancellor, Australia) and observations that the online providers of degrees, and especially short courses, do not appear to be concerned with costly research or supporting campus infrastructures and student support services, were reported during the discussions.

In a paper produced by the Centre for Higher Education at the University of Melbourne, one of the chapter authors expressed concern about the threat to the traditional university business model posed by the increase in online programmes. He outlined a vision for the future of tertiary education in Australia, arguing that, “the clearest disruptive challenge is the rise of MOOC platforms. Student learning can tap globally available offerings without firm attachment to any particular institution” (Sharrock, as cited in James et al., 2017, p.27).

However, contrary to this position, seven of the participants suggested that the introduction of MOOCs was not disruptive innovation. Rather, they were a response by universities to the disruptive innovation caused by the emergence of new online providers and, an attempt to provide access to higher education to a vast (massive) audience that might not otherwise have been previously able to access higher education.

In a broad sense, while some of the participants agreed that this is universities directly responding to disruptive innovation, it may be doing so with an inferior 'product' from that being offered by the new providers. To illustrate, a senior academic stated:

We seem to feel compelled to jump on the online MOOC bandwagon, partly because we can see some market advantage but also because we can see that others from outside the university sector are using it to launch new programmes that might erode away at us. (Interviewee C1, vice-president, USA)

Another participant, while discussing the rapid increase in access to online content, noted that the MOOC “represents a disclosure of university intellectual property at no charge to users that sign up through online portals, and that doesn't make much business sense to me”. He concluded:

When MOOCs came out Stanford, MIT and Harvard, those names were out there and they're into MOOCs so it appears that these institutions are doing distance education so it must be okay - but in fact what they were doing was crap for distance education essentially, because the experience was so poor, [and what the university really needs to do is] find ways to create extraordinary learning experiences, because I think that is [more] important for the populations we serve. (Interviewee A1, provost, USA)

The participants in more established universities were of the belief that there was little imminent threat to their business model from new entrants. For example, a senior leader said, in the context of a discussion about the challenges presented by changing expectations of external stakeholders, “do I think it runs a risk for our university? No. I believe we are strong enough to withstand any impact, but for lower tier institutions I couldn't say

for sure” (Interviewee E3, acting vice-chancellor, UK). Another participant stated, “the big thing for me in terms of the changes that are happening here is personalised education. Game changer for the university in my opinion” (Interviewee J2, Academic Dean, Australia). This same participant commented that, while this was an evolving issue for his university, it was something that was not an immediate threat but rather an issue for the future:

At the moment it's not attractive for the mainstream players to offer these products, but it's a very attractive product for a certain type of person. Over time, as they become more proficient with their personalisation and technologies and systems in place to drive that, looking into more research and doing all sorts of things that we traditionally would do, then it potentially will be a significant disruptor to the current market. (Interviewee J2, academic dean, Australia)

Another participant suggested, “they’re just dragging what they can and personalising it. But it's just textbook stuff basically” (Interviewee B2, academic dean, USA).

However, despite the optimism that some of the participants expressed about universities withstanding a disruptive threat, both the participants in well-established universities and those in the less-established universities agreed that those below the top tier may face some level of market adjustment, or correction, as new entrants offer a lower-cost, more vocational focused and tailored (and personalised) product.

The theories about disruptive innovation suggests that more established firms are entrenched within their current market situations and therefore it would be difficult for them to admit to the importance and accept the risks of disruptive change (Christensen, 1997). However, for the smaller, and potentially more nimble and adaptable newcomers, change is not only easier but also necessary in order to survive. A participant cautioned, “small, hungry organisations are good at agilely changing product and market strategies and I am not sure the university is going to be able to be as nimble as it might need to be” (Interviewee J2, academic dean, Australia).

Similarly, a senior leader, in response to a question about the future challenges for universities as they construct their brands remarked:

In order for the university to properly adapt to the changes that I can see affecting our sector it will need to untangle itself from its own bureaucracy and start thinking like a disruptor. Big challenge, especially for the more institutionalised universities. (Interviewee D1, vice-chancellor, UK)

There appeared to be genuine concern and frustration about the university's ability to adapt to new environments. A senior academic lamented the fact that, "we are a slow-moving beast and I fear that the wave will have passed over us before we have learnt to swim" (Interviewee B2, academic dean, USA).

In order for disruptive innovation to have taken place, it will be necessary for online education to have disrupted the incumbents' traditional model. Put another way, for disruption to occur, online education's "trajectory of improvement will have 'intersected with the needs of the mainstream market'" (Christensen, Raynor & McDonald, 2015, p.45). The responses suggest that, while there is a recognition of the threat, for most of the participants the immediate threat to their business model is not clear to them. However, Lucas (2015) suggested in an article concerning the application of disruptive innovation to universities that, there is likely to be a contraction in the number of providers as the new disruptive providers evolve their business models. The implications for leadership as universities construct their brand identity in the future may be considerable. If, as suggested by the participants, the sector is disrupted by more agile, less encumbered new entrants providing lower cost 'product' to both new and existing markets, universities brand image may diminish in its appeal to 'consumers' of higher education products.

Conclusion

The goal of this chapter is to inform the first of the research questions: what are the strategic challenges for universities in constructing a brand in the twenty-first century? This chapter also informs the third of the research

questions: what is the role of leadership as universities construct their brand identity in the future?

The responses suggested that, for most of the participants, they remained committed to their idea of the university. Notwithstanding that their understanding of the idea was contextual, there was strong similarity in the way the idea was expressed. The responses to a question concerning 'what is a university?' were largely consistent and referred to the idea of the university as it is traditionally understood. That is, a place that values concepts such as 'knowledge for knowledge's sake', 'critic and conscience of society', 'an holistic education', 'preparing students for the future' and 'a place where academic freedom and the pursuit of new knowledge is nurtured'. Only on rare occasions did a participant offer a description that involved a commercial purpose and, only in China, did a participant explicitly link the dominant purpose of universities to vocational outcomes.

In response to the first of the research questions, the participants discussed six current and future strategic challenges; the role of government; the perceived diminution in the value of the credential; changing expectations from some external stakeholders about the purpose of the university; the authenticity required by digital disruption; the emergence of new tailored academic programmes for students, referred to in this thesis as personalised education; and, disruptive innovation.

The findings presented in this chapter suggest that, for most of the participants in this study, the understanding in some parts of the external community (stakeholders outside of the university) of what universities do and represent may be different from how universities see themselves. In essence, most of the participants in this research appeared to have constructed a brand identity that encompassed a purpose for the university that may be different from the brand image of universities that has been shaped by the experiences and perceptions of its key external stakeholders.

There were notable differences between countries. In China, there appeared from the responses to be an already established view that a university education is closely aligned with employer and student expectations about suitability for the workforce. This view extended to the role of government and the participants indicated that the role of producer of human capital for industry was directly linked to government policy. Most of the participants in China said that government was interconnected with the leadership of universities and it was inconceivable that their institutions would enact change and make significant strategic decisions without reference to policy makers. This was a sentiment shared by participants in Australia and the UK however it was expressed more definitively in China.

In the UK, the participants were more concerned about the future than participants from the other countries. This could be attributed to the considerable changes that were happening in that country at the time that the interviews were being conducted. Participants referred to the uncertainty about the funding of university places and recently concluded BREXIT vote as unsettling for universities. This appeared to have influenced some of the responses and participants in the UK were more emphatic about universities staying true to their missions and preserving values such as academic freedom and the role of critic and conscience of society.

The participants in the USA and, to a lesser extent, the UK identified that they may be contributing to the changing expectations of universities by external stakeholders through the promotion of a spirit brand. Typically, the spirit brand manifests in an emotional connection through the student experience, as opposed to academic and research programmes (Bok, 2003). In the USA the spirit brand was raised by the participants in discussions about high profile athletics programmes and in the UK, it was discussed by the participants in reference to historic colleges, or residences that formed part of the university campus. These spirit brands appeared from the responses to be a source of tension, the concern being

that their promotion risks trivialising and diverting attention away from the important work of academics.

Overall, the findings presented in this chapter illustrated the significance of the apparent disparity between the brand identity construct and the brand image construct. The discussion of the responses in this chapter provides an explanation about how the disparity may have occurred, the role that universities themselves may have played in creating the disparity, and why this is significant to the construction of the university's brand image.

In seeking to apply disruptive innovation to higher education, what has been absent is experimentation with new models that successfully appeal to non-consumers of higher education. The findings from this study suggests that the proliferation of new online providers, the corresponding increase in preferences for personalised education and the continued diminution in the value of the credential have the potential to disrupt the higher education sector. Although for the majority of the participants they do not see this as imminent. That is, the enabling innovation that Christensen, Raynor and McDonald (2015) foreshadowed is online learning, which is becoming broadly available to market segments that previously may not have had such access to higher education – a key indicator of disruptive innovation. These online providers have continued to grow as they deliver 'product' that satisfies the changing expectations of some external stakeholders, notably students and employers, who appear to have constructed an idea of the university as producers of job-ready graduates and human capital.

In relation to the third research question concerning the role of leadership as universities construct their brand identity in the future, digital disruption and the disruptive threat from online providers may render previous approaches to university branding unsatisfactory. Put another way, the current isomorphic approach to brand communications is likely to come under pressure because of the authenticity demanded by digital disruption. The subsequent need for universities to either construct a brand positioning that differentiates from the new providers, or reinforce the

benefits of a traditional education, may require that universities reconsider their brand strategies. For senior leadership this may present a dilemma as they balance the needs of marketisation against the inherent values of the idea of a university.

Chapter 6 – The brand tension inside universities

Introduction

As the title suggests, this chapter focuses on the tension that exists inside universities as they construct and communicate their brand identities. The goal of this chapter is to inform the response to the second of the research questions: what are the internal challenges that universities experience as they construct their brand identity? The themes identified in the data are interrelated, and therefore this chapter also contributes to the third research question: what is the role of leadership as universities construct their brand identity in the future?

In this chapter I explore how the participants accounted for tension within their universities, how the brand identity is communicated and, how these tensions might impact on the construction of the brand identity. The strategic challenges confronting universities as they construct their brands, described in Chapter 5, may require a more corporate, market-driven approach by universities. However, the seemingly inevitable compromise that the participants identified as a typical outcome of how the tension is resolved within their universities may make this approach difficult. Therefore, the chapter concludes with a discussion about why the apparent compromise that most of the participants identified may not be sustainable for universities as they construct their brand identities in the future.

In exploring the internal challenges that the participants experienced as they constructed and communicated their universities brand identities, three themes emerged from the analysis. The chapter begins with the findings for the first of the themes – the tension.

The tension

Almost all of the participants in this study reported that there was tension within their university as it constructs and communicates its brand identity. For instance, one participant remarked:

Nobody likes to upset anybody so to actually highlight world leading areas that we can claim in academic research runs the risk of upsetting others. So then, if we can't agree then how can we elevate us to world class? This is difficult here. (Interviewee E1, marketing director, UK)

Why the tension existed was of critical interest to the participants. This tension was reported by participants in each country, although noticeably less with participants in China than in the USA, UK and Australia. The reasons for this variance appear to relate to the different political, historical and cultural environment in that country, where some of the participants said that brand and marketing were topics that were not widely discussed in their universities.

The codes that contributed to this theme included brand, marketisation, reputation, prestige and authenticity.

According to the participants, this tension existed because people construct brand identity from the perspective of their role, and from their experiences. Therefore, achieving consensus within universities about what and how to communicate the brand identity could be a difficult challenge for university leaders to manage.

This may be indicative of a wider tension occurring across the various, and distinctly different roles in universities and even more so where there are inconsistencies of views within role groups. For example, there was a greater inclination for those participants in a senior leader role to identify prestige (114), marketisation (145) and reputation (95) as important factors in their construction of the university's brand identity. In contrast, those participants in marketing roles were less likely to refer to prestige (24), marketisation (74) and reputation (40). Perhaps not surprisingly given that the concept of brand authenticity (133) is a marketing term, those participants in a marketing role discussed this more frequently, and in greater depth, than either the senior leader (59) or the academics (78). It is likely that these variances can be attributed to the particular role, or function, that the participant had in the university. Therefore, while the perception of the participants may differ between roles, this appears to be

a matter of perspective. In other words, the individual participants identified various factors about universities as being important in their construction of brand identity, and the way the individual participants articulated their understanding of how the brand identity is constructed evolved from the perspective of their role in the university.

To illustrate, a participant in a marketing role interpreted prestige as an undesirable label, conveying elite, superficial and luxury benefits to external stakeholders:

Prestige for me, here, represents something that does not necessarily fit or suit us. We are younger. We are not the white collar, ivy league type that would hang its hat more on prestige. For me prestige, I wouldn't shudder if someone associated us with prestige and say 'that is a very prestigious school', but it's not a word that I would use in my vocabulary to describe what I would want people to think about us. I would want them to think that we are a world-class public research institution that is second to none. That everything that they set out to do they strive to do it to the top notch, and to go about it in a very genuine, authentic way, knowing and thinking that this is going to affect change and improve the lives of people. (Interviewee A2, marketing director, USA)

This quote is significant because, whereas the marketer had an interpretation of prestige that represented an exclusive product or good, a senior leader in the same institution associated prestige as a relative term, a term applied to legitimacy and not to an exclusive luxury product. This participant said, "I basically think of it [prestige] in terms of the academic rankings of institutions so that has to do with research publications and research dollars they get and that sort of thing" (Interviewee A1, provost, USA). However, it seems that the marketer actually desired the same thing as the senior leader: for the university to be seen as a world-class research university. In this instance, the marketer was using different words from the senior leader to describe the same meaning. He spoke of the university as being a "world-class public research institution" but did not associate this meaning with the word prestige, whereas the senior leader precisely attributed prestige to world-class research institution.

There was a similar sentiment expressed by other participants. A senior leader highlighted the brand positioning of another university that he respected, an identity that spoke to 'elite but not elitist', and he did so in response to a question about the academic interpretation of prestige. He said that this positioning was, "a clever play on words that I wished we had thought of first" (Interviewee E3, acting vice-chancellor, UK). He was not advocating prestige or elitism as being an exclusive positioning. However, the marketer at the same university, in the same way as the example described in the paragraphs above, sought to play down this notion of 'elite but not elitist', the "commercial risks of being seen as exclusive being too great" (Interviewee E1, marketing director, UK). Another senior leader discussed the different perspectives about brand development that exist inside universities and noted, "the marketing people here have associated prestige with elite, unattainable and this is plainly inconsistent with my thinking" (Interviewee D1, vice-chancellor, UK).

Several participants reported that there was some suspicion about the role of marketing in universities. This appeared to reside in a fundamental belief that universities were a different/unique type of organisation and applying conventional approaches to brand and marketing could be a flawed exercise. One participant, a senior leader, during a discussion about how universities could become more commercial in their approaches to brand development said:

The trouble with universities, and I think all have this, is that the values are different. So, we have this confusing mix? What's the customer? And what's the product that we offer? So, we have all these different uncertainties around what a product is and what a customer is. So, without a clear understanding of what your product and customer is, it's very difficult for marketing to apply in the traditional sense.
(Interviewee K1, vice-chancellor, Australia)

Similarly, a participant expressed uneasiness about the way in which his university had decided to grow enrolments in a particular field of study. He commented, "we're cheapening down education by marketing it and selling it and things like that" (Interviewee C2, academic dean, USA). In contrast, a senior leader said, "I think sometimes we get too worried about

how marketing is going to tarnish our reputation” (interviewee A1, provost, USA).

Many of the participants reported that there was considerable tension between the academics and the marketers in relation to the branding process. It appeared from the responses that, while those participants in academic roles did not condemn marketing activities as a force of corruption of the university, as Gingras (2009) spoke of, eight of the academics and senior leaders reported tension about how the brand development process was undertaken within their university. For example, an academic claimed, “how is it that we are now having to attend workshops about values and messaging? When did this suddenly become important to my research” (Interviewee C2, academic dean, USA). Likewise, a participant in a senior leadership role, while relating an internal debate at his university about the merits of having a differentiated brand, noted:

And we're trying because we envisage a future of creation. Not just a constraint of a culture stuck in the past. And, so I think there's a tension there. You're absolutely right about how do we come out with a distinctively 'us' thing that isn't a sum of the parts. (E3, acting vice-chancellor, UK)

In another example, a marketing director stated, in response to a question about how she thought senior leadership considers brand and marketing in universities, “it's been interesting because, of course for many of the academics you know, there's always a concern in academia that marketing is still a bit distrusted” (Interviewee F1, marketing director, UK).

In the same way, a participant noted:

Bringing our senior MarComms person to an equal position at the planning table in an environment in which academics are suspicious about the brand process just didn't work. It gave instant credibility to something some of my academic colleagues didn't want to support. (Interviewee J1, deputy vice-chancellor, Australia)

Whereas most of the marketers said that they tended towards applying a process of constructing brand using conventional approaches to branding,

seeking a point of difference and a common set of values (Aaker, 2014; Holt, 2003; Keller & Lehmann, 2004), many of the senior leaders and academics were reluctant to follow this process. A senior leader expressed her reservations about the process:

What they [the university marketers] do is they engage consultants to do this work for them, and consultants are best used for a corporate type company, where it's very clear what the products are. They're our top brands or top revenue makers so the brand is set around that sort of stuff. But we're different. And also, you've got enormous diversity in universities as well in terms of the value sets that different staff have, some are focused on making a difference to industry and society, others are focused on making differences in students. It's all very different. (Interviewee K3, assistant vice-chancellor, Australia)

One senior leader emphasised the unique nature of universities and the need for caution in applying commercial approaches to branding:

I have to say I value the work of individual academics. And the idea of either shoe horning people's research into a kind of framework, or basically telling people 'well your research doesn't fit into this kind of framework and therefore we don't value it as much'. I fear, by doing this I'd have the consequence of actually depressing our performance, with our performance crucially predicated on strength across the board. So that's a particular conundrum that I find. (Interviewee E3, acting vice-Chancellor, UK)

An interpretation of this comment is that there is a reluctance by the senior leader to prioritise one academic strength over another for fear of upsetting the equilibrium inside his university. This was not an isolated example. A participant provided evidence of the tension between the academic and non-academic parts of the university as the marketing department attempted to prioritise academic strengths:

Nobody likes to upset anybody, so to highlight actual world leading areas that we can claim in academic research runs the risk of upsetting others. So how can we elevate world class at the expense of others, this is difficult here. (Interviewee D1, vice-chancellor, UK)

For some academics the construction of the university brand was not interesting to them because it was either a distraction or because it inhibited their work. During a discussion about whether the academics in his university were engaged with the branding process, a senior leader commented: “so, to answer your question about do they engage in the branding work? Almost certainly not very much” (Interviewee E3, acting vice-chancellor, UK). Similarly, an academic noted, “the brand police decide what colours we can use in here. They [academics] do glaze over” (interviewee F2, academic dean, UK). This position was also confirmed by a participant in a marketing role. Responding to a question about increased marketisation of higher education, she spoke about how important it was for universities to construct a brand that could differentiate her institution in the highly competitive international environments that they were engaged with. She suggested that the role of marketing was downplayed, or perhaps more accurately, subdued by the academics in her university when brand development was raised as an issue:

Marketing yes, I think we all know that's important, but the brand word is a different thing all together. Those conversations don't seem to go anywhere. Tell me where my ads are going, not what our values are. (Interviewee K2, marketing director, Australia)

In analysing the responses, many of the academic participants implied that they worked ‘at a university’ and not ‘for a university’ as the marketers implied. This subtle variance may account for why some academic participants were reluctant to invest in the branding process. Their preference being to focus on promoting their area of academic interest, one which transcends the university.

Some of the participants suggested that as universities continued to develop their commercial strategies, there was increasing levels of debate within their institutions about how to rework their isomorphic approaches to brand development in response to changing markets and increased competition. A participant commented:

One could argue that the customer is the student because they ultimately pay, another person could argue that the customer is an employer in the society that benefits from the graduates. That means that the product is actually the students that we produce. But if the student is the customer, then the coursework is what we're offering. (Interviewee J2, academic dean, Australia)

A senior leader reflected on the complexities of embracing more market-driven strategies against the regulatory framework for universities: "the policy settings in Australia encourage conformity to the traditional university model, and yet the market seems to want something different. This is a conundrum I think" (Interviewee K1, vice-chancellor, Australia). In the same way, a marketing director stated, "we are fighting against our historical roots here [as we develop brand], relevance being the key word for us" (Interviewee J3, marketing director, Australia). Another senior leader noted:

All universities worldwide, broadly speaking, are teaching and researching and are trying to do the same thing within a regulatory framework. So to try to make it clear why we are better or different or unique and still fit within that framework is clearly a challenge. (Interviewee D1, vice-chancellor, UK)

The point being made by the participants is that policy settings, internal disagreement and the historical context is encouraging sameness, and yet the market was driving universities towards some level of brand differentiation.

There seemed to be an issue with marketing's lack of voice with senior leadership. Time and again each of the participants in marketing roles reported that there was a disconnect between the motivations of senior leadership, and the extent to which marketing was able to inform and drive strategy. For instance, a marketing director stated, in response to a question about how senior leadership engages with the brand process:

Marketing has always been a dirty word. We had a strategy ready to go then there was a change in president. Without even talking to us he abandoned the strategy and asked us to start again. Very frustrating. (Interviewee B1, marketing director, USA)

Likewise, a participant discussed whether there was agreement inside her university about the need to create a differentiated brand position. She expressed frustration with the senior leaders in her university because they were unwilling to embrace what she described as a commercial approach. She stated, “they don’t even want to hear the word customer let alone brand or unique selling proposition” (Interviewee B1, marketing director, USA).

The marketers in Australia, the UK and the USA also expressed some frustration about how marketing and brand decisions were being made in their universities. There was a concern that these decisions were being made in the absence of marketing expertise and were not informed by evidence and market insights. For example, a participant discussed the role of marketing in her university. It appeared that despite initial claims about how successful the branding efforts had been, she expressed the view that the marketers voice was not as prominent as it should have been:

I agree with your observation that we don’t have a marketing problem, we have a brand problem. There is a huge tension for us, marketing decisions are made by people without experience and without evidence. It starts to become a sense of maturity in the sector and in the organisation around what marketing’s role is. It’s incredibly frustrating. (Interviewee J3, marketing director, Australia)

Another marketer said, “there is simply no evidence to support the claims that some of the faculty are making about why marketing has supposedly failed them. They did what they did without including us so how is it our fault now?” (Interviewee A2, marketing director, USA).

The role of marketing in determining whether there was a likely demand for a new programme frustrated some academics. For example, a participant stated, “I don’t accept that marketing should be able to decide yes/no about an academic initiative” (Interviewee B2, academic dean, USA). Another academic said, “the problem with marketing having a say in

whether a new initiative proceeds is that they don't have enough knowledge about the subject to make that call" (Interviewee J2, academic dean, Australia). In contrast, a marketer remarked:

They [academics] come to us as the last stop on the road to get us to sign off that their new initiative will appeal to students. I recall on one occasion we did some work that showed there was limited appeal. But it was too late, they had already launched it. And it failed and then it was our fault because we didn't market it enough. (Interviewee F1, marketing director, UK)

An interpretation of this finding is that academics view this aspect of the brand development process as a perceived threat to academic freedom. However, another interpretation is that the academic is concerned that applying marketing methods to an evaluation of their area of interest is a flawed exercise. The nature of their inquiry is an investigation into the unknown or challenging existing understandings and, therefore it is not reasonable for the marketplace to evaluate their ideas.

The tension between the academic and marketing functions was more apparent from the responses in the UK, USA and Australia than in China. As described earlier in this chapter, in China marketing and branding were not matters that universities proactively considered, let alone managed and therefore brand was a slightly uncomfortable issue for many of the participants to discuss. For example, in an interview with a senior leader, he discussed whether the leadership of universities discusses brand:

The thing to know about China is that we don't really talk about marketing or brand, we promote, but culturally marketing is seen as a Western idea. I think the nearest comparison is when we talk about reputation, or even character, or even better, status. (Interviewee G1, vice-president, China)

In relation to the nature of tensions inside universities in China, it was evident from the responses that it was as much about the idea of branding, then it was about how the brand identity might be

communicated. A senior leader, when speaking about the need for a brand, summarised the position for universities in China as he viewed it:

I do think it's a good thing, but we need to think about the brand appropriately, not in a narrow way, but in a broad way. For example, for business, even business showed responsibility, parallel to university, yet the main purposes of those leaders is to inspire the followers to make profit. If the company has no profit, no inspiration. But in universities, knowledge, moral compass, those are the sources of inspiration. So, I think that's the difference. (Interviewee G1, vice-president, China)

Another participant remarked: "prestige is a critical part of every university in China, this is linked to our culture and we frame that as reputation, something that is earned in relationship to other universities" (Interviewee H1, president, China).

The participants in a marketing role in China appeared to have a similar perspective. The two participants acknowledged that the marketer's voice was not a strong one in the management of the university in China, and therefore most marketing activities tended to be tactical, subtle and very targeted. For example, while discussing how the role of marketing is evolving in her university, she spoke about the balance between a conventional marketing approach, and the unique aspects of being a university in China:

There is emphasis on prestige, reputation of the university. Because, depending on which university you graduate from, that's going to determine the nature of the job that you are going to get. So, if you are in the top 10 university, you are likely to get a good position in a government or state-owned enterprise. How we get that message out is very difficult in China. (Interviewee G2, university relations, China)

Some commentators maintain that the preference of universities is to differentiate only on the surface (Delmestri, Oberg & Drori, 2015; Mampaey, Huisman & Seeber, 2015; Toma, 2012). This limited differentiation means that university brands tend to exist within parameters or a frame (Deephouse, 1999), the risk of becoming an "outlier" (Wexler,

2016, p.1) being both undesirable as the university seeks greater legitimacy (Toma, 2012), and commercially unsustainable (Bok, 2003). The consensus amongst most of the participants was that, while universities need to embrace marketisation strategies and engage in marketing activities, there remains a tension as universities seek to construct a differentiated brand identity, a key strategy for firms competing for market share and prestige (Di Maggio & Powell, 1983; Mampaey, Huisman & Seeber, 2015; Toma, 2012). That universities should not follow commercial approaches to branding is a feature of the literature, with Donoghue (2008), Gingras (2009) and Temple (2011), referring to the risk of universities adopting conventional branding approaches that do not consider their unique complexity. According to the participants, the outcome is a compromise, typically one where the marketer concedes ground to the academic in order to enable marketing activities to take place.

The compromise

The process for universities to reach consensus about their brand positioning appeared from the responses to be complex. The participants suggested that the end result is typically a compromise between the academic and the marketer. The compromise, almost by necessity, avoids a focus on any perceived academic strengths of universities, and this is at least partly because universities cannot agree on which academic areas to prioritise. In this section I explore the apparent compromise.

It was the participants in marketing roles who most often identified that there was a compromised outcome to the brand development process. The codes that contributed to this theme included compromise, storytelling, differentiate, product, consensus, comfortable strategies, scepticism and resistance,

In relation to the view that the communicated brand identity was a compromise, there were 32% more occurrences of the codes in the responses with those in a marketing role, compared to participants in an academic role, and 17% more occurrences compared to participants in

senior leadership roles. There was also more of a skew towards participants in marketing roles in the UK compared to the other countries. I identified this theme 2.43 times more compared with participants in marketing roles in the USA, Australia and China.

In China, there was no evidence to suggest a compromise and this is, as described earlier in Chapter 2, likely attributable to the particular cultural, historical and political environment in that country where universities are considered to be strongly connected to the State (Tran, 2017). According to the participants, the role of marketing in China appears to be restricted to basic promotion and engagement rather than a deliberate attempt to construct and communicate brand identity. A participant stated, “we focus on face-to-face and social media interactions. Care is needed to ensure we are not spending resources on more obvious marketing activities” (Interviewee H3, head of promotions, China).

A closer analysis of the data identified a number of notable variances. The challenges to achieving brand consensus occurred three times more with participants in a marketing role than participants in an academic role or a senior leadership role. Similarly, as the marketers attempted to apply conventional brand practices, they appeared to be encountering resistance and the code resistance was only attributable to participants in a marketing role. Reinforcing this point, the marketers were more likely to say that he/she thought that they had compromised their approach during the brand development process, the code occurring seven times more than it did with participants in either an academic role or a senior leadership role. Another example of the marketer attempting to apply conventional brand development practises and encountering resistance from within the university, was in relation to the understanding of the components that contribute to the construction of an effective brand identity. The marketers identified storytelling (47 occurrences) and the need to differentiate (63), whereas the academic and senior leader (14 and 35 respectively) participants largely ignored such references, their preference being comfortable strategies focused on prestige and legitimacy (26 and 38, compared to six for the marketer participants).

The outcome of the brand development process appeared to be a compromise between the marketer and the academic. The participants indicated that this compromise reinforced the isomorphic strategies that have featured in university marketing as universities seek greater prestige through strategies to enhance legitimacy (Di Maggio & Powell, 1983; Donoghue, 2008; Mampaey, Huisman & Seeber, 2015; Toma, 2012). A senior leader made the following comment during a discussion about how the marketers might need to approach brand strategy:

You can't differentiate in the normal sense, because if you do that then you run the risk of being too different, and that's a huge risk. So, effectively marketing within boundaries becomes the strategic imperative. (Interviewee C1, vice-president, USA)

Many of the participants suggested that the compromise tends to focus on 'soft values' that may stretch to a way of thinking, location or an approach. For example, a marketer reported on how she began a brand development process that followed a conventional approach. She conducted focus groups with various stakeholder groups, undertook comprehensive market research, and attempted to develop a brand positioning. The end result appeared to have been a compromise. During the discussion I moved from a sense of anticipation to an underwhelming sense of anti-climax. As I probed deeper it was evident that this sense of anti-climax was shared by her, and she acknowledged the compromise that she had made. In her view the brand positioning was not as differentiating as it should have been and she noted, "no we didn't [pursue a true point of difference], we didn't. Well I knew we would still be discussing it now" (Interviewee F1, marketing director, UK). However, according to an academic at the same university, his colleagues greeted the compromise with a sense of relief, grateful that the seemingly inevitable conflict would be avoided. He noted, "there was never going to be a Coca-Cola type outcome here, there are too many stakeholders with too many opinions to make this a viable reality" (Interviewee F2, academic dean, UK).

Likewise, a marketer conveyed how he had tried to persuade the senior leadership of his university of the merits of developing a brand strategy focused on academic strengths. As in the previous example, the marketer had attempted to apply conventional practises to the development of the university's brand identity, only to have his academic colleagues resist his efforts. The marketer noted, "I tried on four separate occasions to convince the senior leadership about building a differentiated brand and I just couldn't get any traction" (Interviewee E1, marketing director, UK). A question was asked of the senior leader at this university why it was that there was resistance to the idea of developing, or constructing a differentiated brand at this university. He responded with the following statement:

And I can absolutely understand why he [the marketer] needs that. Difficulty is that you get pushed back because it's not just from people who say, well this isn't including my research but more generally. It's the kind of objection to the idea of highlighting anything at the expense of anything else. And if you're, I'm inclined to say, if you're an institution that feels, rightly or wrongly, that you're pretty good across the board, it's actually quite difficult. (Interviewee E3, acting vice-chancellor, UK)

When pressed further, this emphatic comment was offered as an explanation about how he viewed brand development: "but we are committed to these across-the-board strengths and this will undoubtedly put me in conflict with the brand people here, because I simply will not agree with developing a brand in the way they want to" (Interviewee E3, acting vice-chancellor, UK).

In another example of how a marketer had compromised during the brand development process, the participant spoke about how she had engaged her marketing team to apply conventional brand practises to the construction of the university's brand identity. However, as with the examples in the preceding paragraphs, the final campaign outcome appeared from her responses to be a compromised outcome. The participant discussed the development and launch of their brand campaign and spoke about how the university had come together to embrace the new brand strategy. I was presented with the campaign executions during

the interview and after reviewing the material I asked whether the so-named brand campaign was really differentiating this university from others. I highlighted that I was aware of a university in another part of the world that had adopted an almost identical creative strategy. It was interesting that, when I probed further it was evident from the interviews with both senior leadership and the Marketing Director, that the ideas communicated in the campaign did not have the consensus of the university community, despite the initial claims from the marketer. When a question was asked about whether this was really a marketing campaign and not a brand strategy, the participant became defensive at first, and referred to the awards the campaign had won. However, she then acknowledged that there were gaps in the customer experience and that there was a disconnect between the constructed brand identity and the experience reported by customers in market research. She commented, “we are now cautioning the institution about the expectations that these types of campaigns create, because the experience might not line up as much as we would hope” (Interviewee J3, marketing director, Australia). The senior leader at the same university commented, in response to a question about how he thinks that universities manage brand:

I think that with any branding exercise, for a place like this you are fighting against the gravitational pull of history and people's perceptions of what the university was, or what they've always imagined it to be. We have to be careful about creating brand associations that we might regret down the track. Either because we can't substantiate it or because it restrains our business. (Interviewee J1, deputy vice-chancellor, Australia)

The inference to be gained from this quote may be that, while the senior leader recognises the need to develop a brand that generates a greater awareness of the university and its purpose in order to find students, the marketer is effectively a means to that end. This approach is consistent with the participant being more comfortable with strategic legitimacy and isomorphism than with differentiation. In other words, the participant has suggested that universities appear to be more interested in positioning to realise greater prestige.

In the USA, the responses suggested that the role of marketing is closely aligned to recruitment outcomes and, while the deeper brand discussion is evolving, the participants in a marketing role also appeared to have compromised in order to achieve a consensus outcome. For instance, a marketing director related how she had led a pan-university project to develop a brand identity for the university. The project was informed by data collected internally, as well as by consumer insights. However, upon presenting the proposed outcome, the university senior leadership rejected the proposed strategy because “it didn’t align with what they thought it should be” and “basically ignored the research”. The participant lamented, “despite all the work that went into it, [the President] pretty much put everything on hold. We don’t talk about the brand as much anymore. We talk more about his strategic priorities” (Interviewee B1, marketing director, USA).

One of the possible explanations for the apparent compromise is government policy settings. In particular, senior leadership may need to balance the desire of some parts of the organisation to construct a differentiated brand against the compliance requirements of government. The responses from 10 of the participants suggested that the policy framework in Australia, the UK, China and the USA encourages sameness at a time when many commentators, employers and politicians around the world are encouraging greater diversity and specialisation. For example, in Australia there appears to be a push for a stratified, or tiered system whereby a group of research-intensive, so called elite institutions, are incentivised to compete to be world-class, with concentrated research subsidies (Davis, 2013; James, 2017). According to Marginson (2013), Davis (2013) and James (2017) these institutions would provide the innovation that is considered one of the most important factors in enhancing economic productivity and competitiveness. This was reflected in the interviews, and one senior leader in Australia remarked:

This does not mean a shift away from the goal of universal tertiary opportunity, but rather recognition that a tiered system with distinct offerings is desirable, it reinforces the need for a world-class and diverse university sector and provides a transparent structure for the Australian and international

market. (Interviewee J1, deputy vice-chancellor, Australia)

At the same university, the Marketing Director discussed the changes that she believed were necessary for universities to become more market oriented. She stated, “government policy is often thrown at us as a reason why we need to be cautious about brand building. What happens when policy changes?” (Interviewee J3, marketing director, Australia). This participant subsequently inferred that this should be irrelevant, as a brand should be stronger than a change in government policy. In a similar way, a senior academic in the USA noted, during a discussion about the threats from private providers and declining state financial support:

When the State paid huge chunks that [influence] made total sense, the State was making a statement that we wanted to make an investment in research for the betterment of our State. But, when that declines the university needs to find [new] funding to sustain the engine. (Interviewee A1, provost, USA)

In the UK, a participant, in response to a question about the influence of government policy on decision making, stated:

Would the government ever dream of imposing these sort of things [restraints] on small businesses? Of course it wouldn't, so it does have a different attitude to higher education, and this does restrict what we can and can't do to compete with privates. (Interviewee D1, vice-chancellor, UK)

In the same vein, a participant expressed uncertainty about whether the governments that typically regulate the potential for a true market will change policy settings sufficiently to enable such change:

I think everything is relative. It depends on what standard you aspire to. There is definitely a rationale for more funds to go towards universities that are engaged with costly research. Personally, I have reservations about whether a government will make that shift. (Interviewee E3, acting vice-chancellor, UK)

The responses from most of the participants support the idea that there is

a compromise between the competing interests in the university as their institutions seek “the balance point where a firm is as differentiated as legitimately possible” (Deepphouse, 1999, p.162). The strategic challenges described in the previous chapter appear to have accentuated the potential for internal tensions and conflict as the players inside universities compromise in their efforts to create (or not) a differentiated position in highly competitive marketplaces. As the participants constructed their university’s brand identity, the traditional commitment of the academic faculty *to their devotion* (Parsons, 1971) appeared from the responses to be further confused with the articulated values of the university’s brand communications, and therefore generate further tensions as the university *saga* (Clark, 1972) evolves.

In the face of existing and future challenges, several of the participants in marketing roles have suggested that this seeming commitment to not “stepping too far from the herd” (Toma, 2008, p.1) may not be sustainable. If the participants are correct and, compromising on the construction of the university’s brand identity is less likely in the future, the current theories about isomorphic approaches to university branding are likely to be challenged. The caveat here appears to be the role of government. Most of the participants spoke about the influence of policy settings on decision-making and, for many participants, the ability or otherwise to respond to challenges was a function of how much scope governments would allow them.

In the preceding two sections I explored the nature of the tension that the participants reported within their universities about how the brand identity is communicated, why this tension existed and, how these tensions might impact on the brand identity construct. According to many of the participants, particularly those in marketing roles, these tensions result in a compromise brand positioning. How this compromise manifests in brand communications was a theme that emerged from the analysis of the data and this is discussed in the next section.

Brand communications

The analysis of the responses identified that there is a tension between the academic and the marketer in relation to how a university's brand identity is communicated. As with the previous section that discussed the compromise, it was the participants in marketing roles who most often discussed how brand communications were not as differentiating as they could, or should be. The codes that contributed to this theme included collateral, communications, marketing activities and competition. There were 41% more occurrences of these codes in the responses from participants in a marketing role, compared to those in an academic role, and 12% more occurrences compared to participants in senior leadership roles.

There was agreement across most participants, including China, about the need for universities to engage with markets to find students, philanthropy donations, commercial revenues and research funding. There was also an acknowledgment that universities "must be engaged with marketing activities in order to ensure the sustainability of the enterprise" (Interviewee E2, academic dean, UK). And yet, while there was an understanding across all of the participants that marketing was a necessary activity, marketing was seen by many of the participants in academic roles as a "function of enrolment and the emphasis is on promotion and support to the recruitment process" (Interviewee C2, academic dean, USA), rather than any attempt to develop truly differentiated brand communications. For example, a participant noted, "it's a little bit of a juggling act when we balance the marketing piece of what we do with enrolment management and making sure that we're sensitive to how we formulate our messaging so as to be recruitment in focus" (interviewee C2, academic dean, USA). Another academic stated, "I'm not personally an expert on marketing but I appreciate we need it" (Interviewee J2, academic dean, UK).

There was some evidence that this was changing, with comments such as "the brand piece is getting more air now than it did a few years ago" (Interviewee B1, marketing director, USA) and, "we are starting to talk

about what our brand needs to be to be competitive (Interviewee E2, academic dean, UK). However, according to many of the marketer participants, universities do not want to be seen as an anomaly. The path to greater legitimacy being one where institutions are more alike than they are different, appears to be the prevailing strategy for senior leadership. This sentiment appeared to be a source of some frustration for two of the marketers that I interviewed, particularly one that had recently moved into the sector. He had only joined higher education in the past year and his experience prior to higher education was in the private sector, specifically in advertising agencies. He expressed frustration at the lack of agility within his university and, the apparent unwillingness of senior leadership to adopt commercial approaches to the communication of the brand identity:

I do feel that there is a missed opportunity from the ultra-top down to place much greater emphasis on an organised brand. I think that there's a lot of tiptoeing and a lot of fair weather playing. I think that if any true CEO came into a situation like this they would see so much opportunity to clear it up. I think that there is a lot of missed opportunities to apply better direction to our brand communications.
(Interviewee A2, marketing director, USA)

In some cases the senior leaders and academics were forthright in their stance on marketing and communications. For instance, a vice-chancellor, while acknowledging the need for the university to engage in marketing activities, made it quite clear that communicating a brand identity around academic strengths was not something that his university would embrace:

Universities are all the same, you know. In the business world, every business has a kind of a niche. Now you might be competing in the market with all the people and you're doing something different as you go to, then you're trying to portray why you are better than that. But, all universities worldwide, broadly speaking at teaching researching are trying to do the same thing. So, trying to make it clear why we are better or different or unique is clearly a challenge, and enabling a process to do this in a university is an even bigger challenge. (Interviewee D1, vice-chancellor, UK)

Similarly, a participant said, “I am trying to develop brand communications as I would have in my previous role in consumer goods, but the university just doesn’t seem willing to go with me” (Interviewee E1, marketing director, UK). One senior leader stated:

The challenge for universities, the reason why they want to drive themselves up what they refer to as the prestige totem pole is because they can’t really afford to be radically different. Because if they are radically different then it’s hard for the student to compare them. (Interviewee K1, vice-chancellor, Australia)

The same participant later observed:

If you want to gain legitimacy, you’ll have to tick a number of boxes about what your stakeholders and society are expecting of a high education institution. You have to stay in that comfort zone and the question is then how much can you deviate from that and remain prestigious? (Interviewee K1, vice-chancellor, Australia)

This seems to imply that universities are more comfortable in pursuing an isomorphic brand strategy, the risk of becoming an “outlier” (Wexler, 2016, p.1) and losing *legitimacy* (Toma, 2012) being too great.

There was also an appreciation across most of the participants that universities were engaged in highly competitive markets, whether that was for students, for staff or for research funding. Therefore, “marketing is a modern reality that we all understand and we all need to support” (Interview K1, vice-chancellor, Australia). To illustrate, an academic recognised the need for universities to market themselves to attract students, stating, “there is no expectation that students will just show up, we have to find them” (Interviewee J2, academic dean, Australia). However, again this was not without some frustration on the part of the marketers. For example, one participant commented, “we all know marketing is necessary, but when I start talking about how we actually communicate to the market I sense a change in the mood, especially from academics who seem reluctant to embrace that idea” (Interviewee K2, marketing director, Australia).

Nevertheless, the idea that the marketing of higher education should be further encouraged, was not supported by all of the participants. In China, a vice-president of a large public university noted, “we have an obligation to be, first and foremost, educators and I worry that resources that could be better applied to education are being wasted just so universities can advertise to survive” (Interviewee G1, vice-president, China). This was a view that was shared by other participants. An academic remarked, “there is a real concern in this place that funds that should be committed to research and developing new programmes is being wasted on advertising” (Interviewee J2, academic dean, Australia). Another participant claimed, “we are starting to notice that the academic units are having their budgets cut but not the marketing department. They seem to be getting bigger” (Interviewee E2, academic dean, UK).

In China, marketing was not a concept that all of the participants were comfortable discussing. Therefore, the idea that universities would market themselves, or create differentiated brand communications, was not widely supported by the participants. Most of the participants there were circumspect about discussing the topic. For instance, a participant stated, “while we don't use the marketing word, the reality is that we do promote and we do value status and reputation” (Interviewee H1, president, China). In an interview with a vice-president, the participant spoke about the difference between marketing as a Western concept versus status, a more important concept in China:

No, we talk about status, we talk about reputation, we don't use the word brand. We don't use the marketing word. Promotions yes, but not marketing. Marketing is not about what we say about us, but what others say about us. We need to have external opinions from graduates, employers, etc. That is a better way of selling our university, instead of we talking about ourselves. (Interviewee G1, vice-president, China)

This reference to how marketing is perceived is important in the Chinese context, because each of the participants reported that being respectful and humble were important values to uphold and, universities needed to

be careful about making boastful claims about themselves. They were more comfortable discussing how others would speak about their university and, this was considered by the participants to be a more appropriate way for Chinese universities to 'sell' themselves.

In the same way, all of the participants in China suggested that universities were very careful about being seen to be engaging in communications activities, let alone develop a brand strategy. For example, one participant clarified what he believes the brand means to the university in China:

Well, in China, the brand has a specific meaning. We misunderstood the brand. The brand was borrowed from business, from the business companies. In university landscape, when we borrow that brand to our university, it gives a sense of marketisation, to sell the university's prestige program. (Interviewee G1, vice-president, China)

An interpretation of the responses is that the brand image, rather than the university's brand identity, was of primary concern to Chinese universities. This also helps to explain why, relative to the USA, the UK and Australia, there appeared from the responses to be a lesser degree of tension within universities in China as they constructed and communicated their brand identities.

There was some evidence that marketers in the USA, the UK and Australia were able to influence their academic colleagues about the value of brand communications. In response to a question about how marketing and brand was viewed at their university, it appeared from most of the responses that marketing was an accepted part of the day-to-day operations. However, in two cases, there was a resounding confidence expressed by these participants in marketing roles that they had achieved their desired outcome and had communicated a differentiated brand identity that was supported across the university community. One of the participants commented, "I guess we've worked very hard to educate senior executives [in our institution] about what marketing and what brand

is. And have had a great success with that” (Interviewee J3, marketing director, Australia).

That senior leadership of their respective universities agreed that brand communications was an important function was considered an achievement for these two participants in marketing roles. For instance, one of these participants reported:

I think that the truest, I guess the biggest measure of that success is that when I go out and interview academics, asking them about their research, and thinking about how we might frame future campaigns or future activities, they are constantly telling me how they are aligning with our brand campaign. (Interviewee A2, marketing director, USA)

If we were to consider that the cost of completing a university degree in the USA, Australia and the UK places higher education in the luxury category (Schembri, 2009). Then, in the context of market dynamics, competition, and where higher education is now more accessible than ever in its history (Bok, 2003), it was interesting to understand from the participants what they believed that brand communications mean to consumers in the era of mass-prestige – “masstige” (Schembri, 2009, p.376). In an interview with an academic dean, she noted that a university’s brand communications needed to be relevant to the market that it was seeking to engage with:

I think we think of brand in a university context, we think of brand as what we want to be known for, but it is also, and it seems very marketingish, but it’s also the promise of what you’re going to offer, and your confidence in fulfilling that promise. I think that that’s the same thing whether you’re talking about a Marriott versus a university. They know who they are, they know what their strong points are, they try to sell those strong points, and then they have to deliver on them. But they make a promise to their constituencies, and they have to deliver on them, and I think in very broad terms, brand is the same for higher ed. (Interviewee B2, academic dean, USA)

This is consistent with Schembri’s (2009) and Tynan, McKechnie and Chhuon’s (2010) observation that consumers co-construct the brand

experience, and the consumers' own stories give meaning to their particular version of the brand experience and their shared interpretation of a brand's communications. In another example, a participant, replying to a question about how consumers of higher education differentiate between universities, commented:

Well we are selling an investment in the future and international students, an important customer base for us, are being asked to make a considered decision that isn't much different to buying an expensive car. Are our service levels up to that standard? (Interviewee K1, vice-chancellor, Australia)

In response to the same question about how they think that consumers differentiate, a marketing director questioned whether, "with the competition being so fierce we have discussed whether service levels could be a differentiator for us, there being little real difference in the product being offered" (Interviewee J3, marketing director, Australia). Another marketing director maintained, "a degree is a degree and for those universities that aren't in the top tier of prestige they may need to provide a type of concierge service to lure them away" (Interviewee E1, marketing director, UK).

I was interested to understand why three participants in marketing roles that had more recently moved into higher education, reported that the communication of the university's brand did not appear to follow conventional brand practises. This appeared to raise questions for them about the way in which university brands are constructed, the nature of university brands, and whether there was any alignment with brand communications. For example, one participant remarked:

One of the things when I think about a university brand though is the integrity of the university brand, because, and I guess I'm channelling Holt a little bit here, because he is who I've been a bit of a fan of, and he wasn't talking in the university context but he was talking in a brand context. He said that in his case, in his view, brands cannot exist in an environment of information asymmetry. And, arguably that's a characteristic of the university. (Interviewee E1, marketing director, UK)

Another participant said, “I have now realised that embarking on the brand communications process that I would recommend to a client [in my previous job] is a waste of time. They won’t follow it” (Interviewee A2, marketing director, USA). These remarks were noteworthy because there was awareness by the participant of the theoretical challenges associated with the communication of a university’s brand. In contrast, a participant in a senior leadership role, while discussing how university brands are different from corporate brands suggested that, “reputation is an easier construct for the university to manage. Based on history and not about customers’ perception” (Interviewee D1, vice-chancellor, UK).

Toma (2008) wrote that, achieving institutional legitimacy and autonomy through enhancing prestige is “not only an end, but also appears to involve similar means – institutions of different types appear to be using roughly parallel strategies in positioning for prestige” (p.34). Equally, studies of higher education institution brands have suggested that they must also represent that they are similar to other institutions to enhance their legitimacy, particularly those they aspire to be more like (Mampaey, Huisman & Seeber, 2015; Toma, 2012; Waeraas & Solbakk, 2008). According to many of the participants, brand communications from universities appears to have mirrored this approach, with universities across the globe seemingly differentiating at the edges and seeking legitimacy, without being seen as anomalies (Chapleo, 2011; Donoghue, 2008; Toma, 2012; Wexler, 2016). The responses suggest that aligning a university’s brand to one regarded as having greater prestige is a common strategy in order “to move to the next level or a more promising segment” (Toma, 2008, p.30). However, there is some evidence that this position is evolving, with some participants reporting that the debate inside universities about the need to develop brand communications is continuing as universities seek to meet the challenges and opportunities presented by marketisation.

Conclusion

This chapter responded to the second of the research questions: what are the internal challenges that universities experience as they construct their

brand identity? The themes that emerged from this research are interrelated, and therefore this chapter also informs the response to the third research question: what is the role of leadership as universities construct their brand identity in the future?

The responses from the participants indicated that there was a high level of tension within their universities as the participants constructed and communicated their understanding of the university's brand identity. The literature that relates to branding suggests that the construction of the brand is a relatively simple process that focuses on differentiating attributes that culminates in a brand personality (Aaker, 2014; Holt, 2003; Keller & Lehmann, 2004). However, universities are complex, arguably unique organisations, and given the breadth of programmes, services and areas of academic interest offered, the ability for universities to reach consensus about an agreed positioning also appears to be a complex process.

There was agreement from almost all of the participants about the need for universities to be engaged with marketing activities in order to ensure the financial sustainability of the institution – to find students, staff, research funding, commercial revenues and philanthropic donations in increasingly competitive domestic and international marketplaces. And yet, notwithstanding the need to engage in marketing, it was apparent that for most of the participants, the construction of the university's brand identity was a source of tension and frustration within the institution. This tension was more apparent in the UK, the USA and Australia than in China. In China, while marketing was undertaken, but referred to as promotions, branding was not a concept that universities proactively considered, let alone managed, and as a result brand was a slightly uncomfortable issue for most of the participants in that country to discuss.

In response to the second research question, according to most of the participants, the construction of the university's brand identity was a compromise that avoided a focus on particular academic strengths, a major reason for which was that universities were either unwilling or

unable to prioritise academic areas of interest. The compromise, which appeared to be causing a higher level of frustration for those participants in marketing roles, tended to focus on 'soft values' that may stretch to a way of thinking, an aspect of the student experience, or an approach.

The responses from participants in the UK were more emphatic than the other countries in relation to the brand development process. Participants in senior leader and academic roles were concerned about constructing a brand that prioritised one academic strength over another. Some participants were fearful of upsetting their academic colleagues and disturbing the equilibrium inside their institutions. This evoked frustration from the participants in a marketing role and, more so than in the USA or Australia, they indicated that there was a compromise in relation to the development of brand communications.

The findings from this research suggest that this compromise is under pressure as universities seek to meet the strategic challenges of the twenty-first century. The strategic challenges that the participants identified in Chapter 5, notably the authenticity required by digital disruption, the role of government, and the disruptive threat to the traditional model from online providers, appear to have accentuated the tensions inside universities. In particular, digital disruption requires a level of authenticity that universities have not previously been subject to and, one of the implications of authenticity is that the current isomorphic approach to brand communications is likely to come under greater scrutiny.

In response to the third of the research questions, the ability, or otherwise, for universities to either adapt to the changing expectations of external stakeholders (reposition/reconstruct its brand identity), to reinforce the traditional benefits of a university education (shape the construction of brand image) or, stretch brand positioning to incorporate both core business models and new business models may be a key challenge for the leadership of universities as they construct and communicate their brands in the future. Many participants in senior leadership roles were

cautious about how universities can and should construct their brands, due in part to the influence of government policy settings, but also because they were unwilling to upset their academic colleagues by prioritising one academic area of study over another. The responses indicated that there is a desire from all the participants for strong leadership to navigate universities through the challenges, both internal and external, of constructing their brand identities in the future.

Chapter 7 – Leadership dilemma

Introduction

This chapter explores how the participants described the role of the senior leader in universities. There were differences amongst the participants about how they described the role of the senior leader. In addition, the role of the senior leader in universities appeared to some of the participants to be different from the senior leader of a traditional commercial organisation. These disparities may have implications for the construction and communication of the university brand.

This chapter responds to the third of the research questions: what is the role of leadership as universities construct their brand identity in the future? Because the themes in this study are interrelated, this chapter also informs the response to the second of the research questions: what are the internal challenges that universities experience as they construct their brand identity? The chapter concludes with a discussion about whether the role of a university senior leader may need to change to one that is more like the senior leader of a traditional commercial organisation, if universities are to successfully construct their brands in the future.

For the purposes of this study, the role of senior leader in a university was defined in Chapter 4 as a Vice-Chancellor, President, Provost or designate – a role more akin to the Chief Executive Officer (CEO), or Managing Director of a traditional commercial organisation. This narrow description may give rise to an important caveat in this research: the shaping of the role of the senior leader extends beyond the roles that were interviewed during this research. The university council/senate, government, employers and students are stakeholders that play a part, and not including these stakeholders is recognised as a limitation on this study. Chapter 1 described differences between the purpose and function of universities and the traditional commercial organisation, which is important to the findings presented in this chapter. Toma (2012) provided a succinct explanation for this distinction: a university differentiates its value proposition from other universities in the pursuit of greater legitimacy,

raising funds to further their missions, whereas the traditional commercial organisation differentiates to explore a market segment in the pursuit of greater profit.

In Chapter 5, the findings from this study in relation to the strategic challenges for universities in constructing a brand in the twenty-first century were discussed. A conclusion from this chapter was that the leadership of universities may be required to enact more corporate, market-driven approaches as they construct their brand identities. The effectiveness of these approaches is likely to be an important consideration in understanding how universities construct and communicate brand identity in the future. For example, the literature suggests that corporate strategy will function most effectively when it is aligned with brand and, a key responsibility for the senior leadership of an organisation must be to ensure that everyone in the organisation is properly aligned with the brand values (Aaker, 2014; Galbraith, 2016; Holt, 2002). However, in Chapter 6 it was highlighted that the participants identified tensions inside their universities as they constructed their brand identity, tensions that appeared to result in a compromise between the various competing interests and outlooks. The participants have suggested that this situation may give rise to a dilemma for senior leadership: how to preserve the values inherent to the idea of a university with the challenges and opportunities presented by marketisation. Therefore, how the senior leaders of universities respond to the strategic challenges of constructing brands and, attempt to navigate the future direction for the organisation, was of critical interest to many of the participants.

In exploring how the participants accounted for the apparent leadership dilemma that they identified, the chapter begins with an exploration of the first of three themes to be discussed – the referee.

The Referee

The theme of the referee emerged following a closer examination of the data and was often expressed by the participants as a concern. The codes

that contributed to this theme and captured the ideas expressed by the participants included leadership, sustainability, safe strategies, and academic freedom. The common theme that connected these codes and described the pattern that emerged from the analysis was a reported tension about the understanding of the role of senior leader. In total, there were only 411 occurrences of the individual codes relating to this theme. However, notwithstanding the number of occurrences, it was the depth of the discussion and the meaning that the participants ascribed to the role of the senior leader that was of particular relevance to this study.

According to 15 of the 24 participants, the process and skillset required for a senior leader in a university to enact change and build a coalition, is different from the senior leader of a traditional commercial organisation. For many of these participants the senior leader was viewed as a construct that most resembled a referee, adjudicating between the academic and non-academic parts of the university. Put another way, the senior leader was considered by these participants to be a role seeking a coalition for consensus.

Of the 15 participants that were identified in this theme, 5 were in academic roles, 6 in marketing roles and 4 were senior leaders. The participants in academic roles suggested that this adjudicating role was necessary in order to maintain equilibrium, to mediate how the university's brand was constructed and communicated and, preserve the university mission. The academic participants spoke about how it was important for the senior leader to have standing in the academic community and, this was a requirement that was considered more important to them than any proven leadership skills and experience. For example, in response to a question about how the university responds to challenges, an academic stated that the Vice-Chancellor would ultimately be influenced by what his academic colleagues recommended. When asked for clarification, he commented, "when it gets serious, the academic voice is the one the VC will listen to the loudest, he knows he can't hope to succeed if we aren't on his side" (Interviewee J2, academic dean, Australia). Another participant said, "for me the VC is more our academic representative, a key part of

this job being to limit the influence of the non-academic parts of our university” (Interviewee E2, academic dean, UK).

For those participants in marketing roles, there appeared to be frustration about how universities were being led. A participant remarked, “it's kind of real tricky here because we've got lots of different competing voices. We've got lots of egos knocking around and unless you have a Phd you probably won't get heard” (Interviewee F1, marketing director, UK). Another participant, who had only recently moved into higher education from outside the sector, spoke to his frustration with leadership: “when will we ever get a VC that understands that we are in the business of providing higher education and not someone who is only focused on his profile in the world of academia” (Interviewee E1, marketing director, UK).

This frustration was also evident in the responses from other marketers. In response to a question about the extent to which senior leadership is involved with brand issues, one participant suggested that the level of interest was variable, depending on whether it was going to be acceptable to the other academics. Upon further probing, she said, “if what I'm proposing supports and reinforces his [the President's] strategy then it is all go. If he thinks it will be too controversial and will upset his colleagues then no matter whether it is the right thing to do, the answer will be no” (Interviewee B1, marketing director, USA).

The four remaining participants that were in senior leadership roles identified that there were differences between leading a university compared to leading other types of organisations. One senior leader said, during a discussion about how leading universities was a complex undertaking:

The main purpose of those leaders [of a traditional commercial organisation] is to inspire the followers to make profit. If the company has no profit, no inspiration. But in universities, knowledge, moral model, those are the sources of inspiration. So I think that's the difference. (Interviewee G1, vice-president, China)

Another senior leader claimed:

Leading this place is completely different from my previous experience in the commercial world. Here there is a much stronger sense of entitlement, that people in the university feel as though they aren't subject to what I would call corporate governance. (Interviewee D1, vice-chancellor, UK)

The same participant also expressed his frustration at spending more energy than he would have liked arbitrating competing interests: "I too often find myself in a position where I am being asked to take sides and this, I feel, is a distraction from the real purpose for which I was appointed" (Interviewee D1, vice-chancellor, UK).

The theme of the referee was evident in the responses from participants in each of the countries where the participants were located, although in China the concern was not initially forthcoming, and only emerged when follow-up questions were asked of the participants. The topic of leadership and the description of the university senior leader appeared to be an uncomfortable topic. For example, in an interview with a participant in a marketing role, she became quite nervous when she was asked a question about how leadership supports brand, attempting to change the focus of the discussion away from this subject. Similarly, an academic in China shifted from conversational responses to one-word answers when the topic of leadership was introduced. It was only when a senior leader was interviewed that I was able to discern from him that there was considerable ambiguity about what in fact a senior leader was in the Chinese university context, the role of political advocate being so closely intertwined with leadership. He stated, "it is not realistic for the president of a university in China to think that he or she can make decisions without reference to the will of the State" (Interviewee G1, vice-president, China). It is possible that this ambiguity resides in the particular political and cultural environment of China. In Chapter 2, the political and cultural situation in China was described and the interpretation of academic freedom was identified as a concept that was not the same as it is for the UK, Australia and the USA (He, 2002 & Tran, 2017). This difference may at least in part be contributing to the reluctance of the participants in China

to share their views about the role of the senior leader.

Of the 15 participants that highlighted that the role of the senior leader was different from the senior leader of a traditional commercial organisation, six of the 15 participants were from the UK - meaning that all of the participants in the UK were represented. That leadership issues were of concern to these participants may be indicative of the current volatility in the UK higher education sector at the time the interviews were conducted. When I analysed the data more closely to better understand any underlying meaning, it became evident that all six of the participants in the UK expressed concern about the future, and this manifested in a need for more direct leadership (academic and marketing participants) and a corresponding frustration from the senior leaders about their capacity to make effective decisions.

That 15 of the participants viewed the role of the senior leader as being different from the senior leader of a traditional commercial organisation would appear to be significant, but perhaps not completely surprising. The findings that were presented in the previous chapter concerning the tensions that existed inside universities as they constructed and communicated their brand identity appeared to result in a compromised brand positioning. Many of the participants attributed this to the role of the senior leader. This interpretation of the role of senior leader by the participants is also consistent with my own experiences as an executive working for a university and, is one of the major differences that I have experienced since joining the higher education sector from commercial banking 12 years ago.

According to these 15 participants, the role of the senior leader in universities resembles a referee or adjudicator, rather than the senior leader of a traditional commercial organisation who, according to the literature, is typically charged with providing direction, inspiration and vision (Afshar, 2016; Bolman & Deal, 2017; Lucas, 2015). Implicit in the discussion about these findings is that universities are unique in terms of their purpose, and unique in terms of their decision-making processes.

The findings presented in this section are consistent with the argument set forth by Julius, Baldrige and Pfeffer (1989), where they said that a university “serves clients, has a highly professionalised staff, has unclear and contested goals, and is subject to external pressures” (p.115). The authors suggested that the complexity presented by having stakeholders with multiple and diverse interests results in universities articulating a set of ambiguous goals and strategies. As a consequence, “conflict over goals is common as decision makers cope with the pressures from diverse interest groups” (p.115). Kerr (1963) also referred to the dilemma for senior leadership when he described the university president as a “many-faced character, in the sense that he must face in many directions at once while contriving to turn his back on no important group” (p.22).

In more recent times Afshar (2016) and Christensen, Raynor and McDonald (2015), writing about the disruption of higher education, commented that historical roots and established ways of decision-making are hurdles for universities to overcome if they are to meet the challenges of disruptive innovation. Accordingly, in the next section I explore how the participants viewed senior leadership approaching the challenge of achieving consensus in their universities about the construction and communication of the university’s brand identity.

Internal culture

In the previous two chapters I discussed the internal tensions and strategic challenges that most of participants experienced as a university’s brand identity is constructed and communicated. During the course of discussions about the seemingly relentless change and challenges that most of the participants identified during the interviews, there was also a concern expressed by some of them about how the senior leadership of universities would respond, resolve internal conflicts and, seek to navigate a path forward for the university. The codes that contributed to the building of this theme included saga, culture, and internal.

That there was a reported tension inside universities about how the role of the senior leader makes effective decisions may not be surprising given

the significant amount of change that the participants identified as happening across the entire university sector. Many of the participants said that marketisation, globalisation, increased demands from government and industry, rapid developments in digital technologies and student debt were issues frequently discussed at their universities. According to the participants, these changes, both national and international, were requiring universities to adapt and respond with strategies that are more often associated with profit-seeking corporations. For example, some participants noted that this response was often supported by increased marketing activity and a new focus on customer relationship management. One participant commented, “all of the complex things we now need to consider as we make decisions seem to end up with the need for a more effective marketing and communications strategy” (Interviewee D1, vice-chancellor, UK). Another participant reported, “now we are talking with leadership much more about the customer experience, retention and acquisition type strategies” (Interviewee B1, marketing director, USA).

However, as I reported in the earlier two chapters, there appeared to be a commitment by most of the participants to staying true to the fundamental values of the university, as they understood them. For the senior leader, this environment appears to present significant challenges for the internal culture of their institutions because the chosen direction may not support the traditional mission of the university. For example, a senior leader spoke about how leadership involves itself in brand development:

Universities are all the same, you know. In the business world, every business has a kind of a niche. But, all universities worldwide, broadly speaking are teaching, researching - trying to do the same thing. So, to try to make it clear to our staff and to our stakeholders why we are better, or different, or unique, is clearly a challenge for any leader. (Interviewee D1, vice-chancellor, UK)

Clark wrote about the importance of the internal culture, observing that, “the organisation possessing a saga is a place in which participants for a time at least happily accept their bond” (Clark, 1972, p.183). Similarly, Rottinghaus (2013) succinctly summarised the importance of ensuring that

the brand is understood by those working inside institutions as integral to a positive internal culture: “think of it this way: your brand is a promise that you make to the world. And your employees are your promise keepers” (p.3). This was an issue that many of the participants were very aware of, the rationale being that a committed and motivated organisation is more likely to perform at a higher level (Bolman & Deal, 2017; Lucas, 2015). One participant remarked, “getting everyone on board with the brand is just so important. The brand conversation does go to the heart of our purpose” (Interviewee A2, marketing director, USA).

Nevertheless, more than just acknowledging the importance of the internal culture, 11 of the participants described this as a culture that should be promoted by senior leaders to ensure the successful implementation of change strategies. A participant claimed that a strong internal culture was essential to future success. He said, in response to a question about the future role of universities in supporting economic growth in China:

The greatest challenge in terms of paradigm shift within the university is the leadership required to actually transform the culture itself and ensure that the outcome of the change is the capture of the hearts and minds of the organisation.
(Interviewee G1, vice-president, China)

This understanding about the importance of values in the internal culture was also evident in the responses from some of the other participants. For instance, during a discussion about the compromise that the marketer makes when developing brand communications, she said:

I think one of the things that the leadership has to do first of all, I think it's internal before external, to take that step up. I think there was a lot of work to do when our new president came in, in terms of streamlining offices and approaches, and getting on the same page. (Interviewee B1, marketing director, USA)

How senior leadership supports brand development was a concern to some participants. A marketer noted, “the first effort has to be internal before you decide how you go about going externally changing perceptions and things” (Interviewee F1, marketing director, UK).

Likewise, a participant discussed how universities developed their brand identity, commenting:

We found the biggest weak point was internally. People externally believed we were a good institution. People internally didn't. If you don't believe it, you're not going to deliver on it. (Interviewee A2, marketing director, USA)

Another participant, speaking about the same issue said:

A year and a half ago you could talk to five different people and you would get five different elevator speeches. I think now, internally, with the work that has been done in identifying our strategic priorities, that is less of a problem. (Interviewee J3, marketing director, Australia)

However, the senior leader_of the same university was less effusive about the brand work. He stated, "the problem is that we only ever swim in the shallow end of the pool, the deep end is too confronting for many of our people and so we avoid it" (Interviewee J1, deputy vice-chancellor, Australia). This suggests that the brand work being undertaken at this institution may be avoiding the difficult conversation, where certain academic strengths might be highlighted because they are potentially more appealing to brand image.

In a similar way, some participants suggested that building internal support for brand campaigns may accentuate the tensions that already exist as universities construct and communicate their brand identity, because it has the potential to make academics uncomfortable. One participant noted, "when I raise the idea of highlighting one person's research and not another in our marketing campaigns with my academic colleagues I can almost feel them shifting in their seats, their apprehension is so strong" (Interviewee E1, marketing director, UK).

The theme of internal culture was often expressed by the participants as a concern. This concern appeared to manifest in the distrust that existed between those in marketing roles and those in academic roles, with the marketers referring to the petitioning to senior leadership as an issue for them. An interpretation of the responses is that this issue may be

contributing to the tensions inside universities. For instance, a participant said, “I need to be careful about upsetting the academics too much [about brand communications], it feels like they have a more direct line to the President and I doubt I will win that battle” (Interviewee A2, marketing director, USA). In the same way, a participant noted the compromise that she had made in developing brand communications, stating, “no to some academics doesn’t usually mean no, more like not now while they curry favour with leadership to get their way” (Interviewee F1, marketing director, UK). This sentiment was not unique to the marketer, and an academic in Australia offered an explanation about why marketing needed “to be kept in check”. He commented:

It’s not that I think the marketing teams here mean to hurt the enterprise. I do think they mean well. But the reality is that the academics here have a much better understanding of what makes the university tick. Why do you think a university is always led by an accomplished academic, and not an accomplished business leader? (Interviewee J2, academic dean, Australia)

Later in the interview, the same participant noted, “the key is patience, just because the answer is no today doesn't mean it won't be yes in a few weeks or a month’s time” (Interviewee J2, academic dean, Australia).

In a further example, an academic provided an emphatic response to a question about how academics viewed the brand development process. She stated, “we aren’t a Marriott or a Google, we have different reasons for being here and comprise a variety of different goals so I don’t buy into the need for us all to be on the same page” (Interviewee B2, academic dean, USA). When probed further she clarified, “my academic research is more important than shared university goals. Advancing knowledge is more important to society than advancing the university brand” (Interviewee B2, academic dean, USA). This demonstrates that the senior leader, at least in this university, may have a challenge in building a strong coalition to achieve the objectives of the university’s mission where those objectives are not in the perceived best interests of their sense of the university’s mission.

The apparent contrast to how the traditional commercial organisation communicates its brand was of concern to four of the participants in marketing roles. As I identified in the previous chapter, they were more likely to say that they had compromised to a position that they believed was not the most beneficial brand communications strategy for their university. One participant claimed, “sometimes I’m not sure why I bother. Given the chance I feel like some of the faculty will look for ways to deter leadership from a decision that might not be in their best interest” (Interviewee B1, marketing director, USA). However, this sentiment was not universal and a participant in a senior leadership role, commenting about the increased role that marketing is playing in the university sector, suggested that this was actually a good thing, and remarked, “our world is changing, and relying on the stewardship of academics that have never worked anywhere but a university is a dangerous practice I think” (Interviewee K1, vice-chancellor, Australia).

The distrust that was evident in the responses from most of the marketers in the USA, the UK and Australia about how leadership is likely to respond to the competing interests in universities may also be a function of the level of understanding that the senior leaders had of brand. During the course of a discussion about whether she believes that senior leadership understands and promotes brand, a participant claimed that there is growing appreciation, but senior leadership is more comfortable talking about reputation than brand. She offered the following explanation about how she perceived that senior leaders in her organisation embraced brand development strategies:

Yes, I almost feel like brand is forward thinking and reputation is from the past, what you’re bringing to the table. Brand is how you move it forward. [Despite what the President says] I don’t think that reputation and brand are necessarily the same thing. They may be two ends of the same spectrum, but I think you have to take the reputation that you’ve created and use that as one of the foundations of building a brand. (Interviewee B1, marketing director, USA)

Likewise, a senior leader, when discussing brand and the difference between brand and marketing remarked, “we think of university reputation, the brand word tends to make most academics glaze over. Marketing yes, we need promotion to get students” (Interviewee E3, acting vice-chancellor, UK).

Earlier in this chapter I described how many of the participants had identified the role of the university senior leader as one more akin to an adjudicator or a referee, seeking consensus about the direction for the future. This appeared to be creating significant internal tensions that are increasing as universities seek to meet the growing challenges of constructing and communicating their brands. For some of the participants this has resulted in a level of distrust between the academic and non-academic parts of their universities. In turn, the meaning that the participants ascribed to the internal culture of their university differed according to their role in the organisation. For instance, in Chapter 6 it was reported that academics tended to imply that they worked at a university rather than for a university. Liedtka (1991), writing about organisation values, contended that “sense-making” (p.543) in the organisation is about how the individuals in the organisation embody those values. “Organisations do not make decisions, individuals do, and yet organisations do have values” (p.543). This may require the senior leader to adopt a less adjudicating role as they seek to provide direction in an environment of change and in response to the increasing demands from external stakeholders. For senior leadership, the participants have suggested that this new approach may create a dilemma as they balance the competing interests, and this theme is explored in the next section of the chapter.

Competing interests

Whether it was in the USA, the UK, China or Australia, the senior leaders were concerned with balancing the demands of marketisation against preserving their idea of the university. The codes that contributed to this theme included balance, competing, conflict and governance.

In the previous two chapters I discussed how the participants had identified that the changes and challenges confronting universities as they constructed and communicated their brands were becoming increasingly complex. As senior leadership attempted to develop new strategies for their universities this appeared to the participants to be accentuating tensions. For instance, a senior leader, in response to a question about the emerging influence of brand in universities said:

Well, is it really so that universities are becoming more alike? Because the business literature would say you have to find your niche, you have to distinguish yourself, you have to create a sustainable advantage, and then you can't be similar. So that's I think in a nutshell the challenge university leaders are facing - which respects are they similar? Do they want to be similar? And in which respects are they dissimilar, or do they want to be dissimilar, and can you find out what factors explain why and how. (Interviewee C1, vice-president, USA)

Another senior leader lamented, "it is difficult to focus the organisation on the present when we are still dealing with the past, let alone the future" (Interviewee D1, vice-chancellor, UK). In China, a participant claimed, "you need eyes in the back of your head to try and deal with the next wave of change" (Interviewee H3, head of promotions, China). Likewise, a senior leader, responding to a question about the future for universities, remarked, "gone are the days when we worried solely about programmes and research, today we need to have an eye on the world, our rankings and the politics" (Interviewee G1, vice-president, China).

Facing these complex challenges and constraints, seven of the participants discussed how senior leaders can effectively guide and adapt an already large, complex, and multi-stakeholder institution. To illustrate, a participant said, "many times I sense the frustration from the VC as he tries to change the direction of the ocean liner with a paddle" (interviewee K2, marketing director, Australia). In another example, a participant discussed the future role of universities:

We are not degree factories. Our business, if you will, is to transform individual lives and to transport new knowledge into the world. As university leaders, we must unravel our historical bureaucracies if we are to convince the general public that

higher education is a common goal worthy of public investment. This is our grand challenge. This is our great hope. (Interviewee A1, provost, USA)

For most universities, their inherent complexity requires a similarly complex system of administration, policies and bureaucracy to support their missions (Bok, 2003). The modern university leader may need to come to terms with this complexity as new strategies are developed, to ensure that he/she is implementing actions that will enhance, rather than erode, their missions (Bok, 2003 & 2015). It was evident that one senior leader was attempting to come to terms with these complexities. During a discussion about how the leadership of his university considers brand, he commented:

As leaders this presents a unique challenge because at its heart the university is not like a corporation, profit isn't our primary concern and to be frank, given how rankings work, being different from everyone else in the sector may not be a good thing. (Interviewee J1, deputy vice-chancellor, Australia)

The underlying issue identified by many of the participants throughout the interviews was a need for greater organisational agility in order to meet the challenges of constructing a brand for universities in the twenty-first century. However, universities are not known for their agility (Sharrock, 2017). Systems and processes that were created in an era where customer service was not a priority for universities, changing demands from government and, an in-built aversion to risk and change often act together to frustrate their efforts to adapt or innovate rapidly enough (Julius, Baldrige & Pfeffer, 1989; Lucas, 2015; Sharrock, 2017). As one vice-chancellor recently said:

We need to move quickly and take on a degree of risk. How to manage and minimise risks is what dynamic businesses do daily, but Australia's universities are not by nature risk-takers, nor do they usually move quickly. They're complex organisations with large bureaucracies. (Jacobs, I, as cited in Sharrock, 2017, p.33)

In order for universities to become more agile, there have been deliberate attempts by them to review their organisations and their processes to

achieve greater efficiencies. Some of these initiatives have been in response to a need to provide improved service levels and others to reduce costs (Craig, 2014; Sharrock, 2017). However, Sharrock (2017) made the following cautionary observation: “streamlining and cost-cutting alone cannot suffice. Many Australian university leaders recognise that attempts to do too much in-house, often in the name of institutional autonomy or professional independence, ultimately limits any single institution’s capacity to pursue its public mission” (p.34).

It could be argued that the responses tentatively support Sharrock’s (2017) position, but the responses also suggest that a key reason for universities being unable to untangle themselves from processes and adopt a nimble approach is the role of government, an issue that was discussed in Chapter 5. Nine of the participants, five of whom were in senior leadership roles, spoke about the impact of changes to policy settings, particularly changes that impacted on funding and reporting requirements, as being inhibitors to change. Further, some of the senior leaders said that government policy settings weighed on them as they considered whether to support the marketing division of their university and develop brand communications. For example, a senior leader stated, “government policy is a constant concern and while I get that we need a brand strategy to attract international students I am reluctant to be too bold domestically, this might blow back at some point” (Interviewee D1, vice-chancellor, UK). This suggests that the role of government may be an issue for him as he attempts to navigate a path for the university in the face of the challenges of constructing a brand in the twenty-first century. As Chapman (2012) forecast, the future of universities is likely to be at least a function of government policy and regulation, despite the influences of marketisation.

In the UK, there was an emphatic resistance on the part of those participants in senior leadership and academic roles to conceding completely to the demands of marketisation. For instance, a vice-chancellor, in response to a question about the challenges that he sees for universities into the future, noted, “we must resist change for change sake,

universities have survived for centuries by staying true to core values and mission, and I will stand in that corner despite what the pundits might suggest” (interviewee D1, vice-chancellor, UK). Likewise, another senior leader stated:

While I accept that change is inevitable there are literally thousands of universities in the world doing the same thing, with similar missions, and demonstrating a commitment to research. We will find a way to survive, just as we always have. (Interviewee E3, acting vice-chancellor, UK)

Upon further questioning of this issue, it appeared that in the UK there was a strong commitment to the pull of history and tradition. The senior leaders in the UK expressed a view that their legacy was connected to their predecessors, and that they were responsible for ensuring that the core values that they had been entrusted with would continue to be enshrined within their institutions. For example, a senior leader of an established university regarded for its traditions stated, “the reality of the current world is one that many here seek to ignore, and no matter the pending crisis we will prevail” (Interviewee E3, acting vice-chancellor, UK). This commitment by senior leadership to their historical roots may also contribute to our understanding about why those participants in marketing roles in the UK more often reported that they had compromised on brand, marketing strategy and communications, compared to the participants in the USA and Australia.

In contrast to the UK, the participants in Australia, China and the USA seemed more willing to adapt to changing circumstances and interpret their mission more liberally to take advantage of the opportunities presented by the knowledge economy. A senior leader said, “the university mission is almost necessarily vague and given the changes sweeping through our sector this gives us some wriggle room to adjust” (Interviewee K1, vice-chancellor, Australia). In China, a senior leader remarked, “of course we see ourselves first and foremost as an institution for higher learning but we must also be willing to adapt should the circumstances arise” (Interviewee G1, vice-president, China). In another example, an academic noted, “we are all realistic enough to understand that it is

important for us to be adaptable and not so rigid as to deny ourselves of opportunities to grow and find new revenues” (Interviewee B2, academic dean, USA).

The findings presented in the previous chapter suggested that there appeared to be a compromise between the competing interests in universities as they seek “the balance point where a firm is as differentiated as legitimately possible” (Deephouse, 1999, p.162). For the senior leader this appears to be a less confrontational strategy, a position that also helps to account for how many of the participants described the role of senior leader as a referee, rather than a visionary and inspiring figure. However, for one participant, always applying this approach may not be effective. He commented, while explaining the challenge that he was facing trying to enact necessary change in a complex organisation:

Effective leaders understand that while each leader has a preferred go-to approach it is important that the leader is conscious of this at all times and aware of the limitations of just favouring one approach. (Interviewee D1, vice-chancellor, UK)

There also appeared to be an emerging understanding amongst the participants that senior leadership needed to be authentic about their universities messaging. To illustrate, some of the participants observed that there was a growing awareness that research is a vital part of the university experience and is enormously valuable in global university rankings. Despite this, it was noted by four of the participants, three of whom were either academics or senior leaders in their university, that the typical undergraduate experience is one that largely avoids research. There was evidence that this was a concern for some participants. A senior leader said that he was attempting to enact change to the curriculum, in response to market research that suggested that the university’s brand identity was not aligned to its brand image:

What we're now doing is we're going back and we're looking at our curriculum and we're saying how can we bring research into our curriculum, because that if you like goes to the heart of what a university is all about. (Interviewee D1, vice-chancellor, UK)

Another participant remarked:

There is a concerted push to figure out how to make sure that undergraduates have a research experience when they're here, because we are known for research. That's what our faculty do and we need to make sure our students have that experience. That's this brand issue, a push to ensure authenticity because it hasn't been true a lot in the past. (Interviewee A1, provost, USA)

I was particularly interested in this comment from the senior leader because this was not a message that I received when the senior marketing officer of the same university was interviewed. The Marketing Director at this university referred to the research findings but he said that he did not think that the university senior leadership would make any changes, claiming, "we are in a cycle of mediocrity, no urgency to change even when our customers are demanding it" (Interviewee A2, marketing director, USA). I probed further during a follow-up conversation, in the knowledge that a senior leader at the same institution had expressed a view that was quite different. He said that the senior leader had an opportunity at a recent staff forum to advocate for the marketing position but he chose not to: "he could have stepped up and pushed the point but it was clear that he didn't want the confrontation so he side stepped it completely" (Interviewee A2, marketing director, USA).

The situation for senior leaders in the USA appears to be further complicated by the growth in athletics, and specifically the commercialisation of the athletics brands (Bok, 2003 & 2015). In response to a question about how senior leadership considers the balance between academic integrity and athletics, a participant lamented, "the reality is that the revenues from certain athletic pursuits can subsidise important research and academic areas that otherwise simply would likely suffer. It doesn't sit well with many academics that's for sure" (Interviewee C1, vice-president, USA). Similarly, a senior leader claimed, "most academics just grin and bear it, but you know deep down they resent that an institution of higher learning is shopping its brand like a can of coke" (Interviewee A1, provost, USA). Another participant noted, "we were mostly known for

basketball. That's not that great for a higher ed institution. You want to be known for some level of academic excellence. It sort of jarred people, and forced them to relook at what we say about ourselves" (Interviewee B2, academic dean, USA). This situation was unique to the participants in the USA.

In Chapter 3, I described the university as unique in terms of its purpose, and unique in terms of its decision-making processes. The literature suggests that the behaviour of the university has changed over time, to reflect the changing environment in which it operates, and to increasing external scrutiny (Bok, 2015; Clark, 1988; Craig, 2015; Gruber, 2014; Kerr, 1991; Marginson, 2008; Neave, 1988; Zhang, 2017). However, as universities responded to these developments, several of the participants remained largely steadfast in their commitment to the ideals of academic freedom, the pursuit of knowledge and the role of critic and conscience of society. Put another way, despite the challenges that the participants reported that are confronting the sector as they construct their brand identities, most of the participants agreed that universities will continue to have an important role in society into the future. A senior leader captured the challenge succinctly:

Universities are not factories; students are not widgets. They come from different backgrounds, with different degrees of preparation, and with different talents and skills that they might not even know they possess when they enter. Universities are not venture capital-based software companies, the vast majority of which fail. When it comes to public higher education, failure is not an option. (Interviewee D1, vice-chancellor, UK)

For several of the participants, the discussion about the strategic challenges confronting the sector led to a larger issue, that being the potential threat to the financial sustainability of universities. Comments about the threat of mergers, insolvency (closures), and change to the traditional higher education landscape, were more evident in the responses from participants in the UK and the USA. This is likely because of the specific marketisation and regulatory changes (highlighted in Chapter 2) that were present in these two countries. To illustrate, in the

USA, a senior leader cautioned, “increasingly I am seeing articles about closures, mergers and flashy new entrants, and I worry not just about my people and my students but for the sector as a whole” (interviewee C1, vice-president, USA). Likewise, another senior leader, discussing the future for universities, suggested:

It will be interesting to see what happens with some institutions in this new era, as new institutions seek to establish a brand around producing better learning outcomes. If they can demonstrate that. It will be interesting to see if they can. It won't be the big research universities trying to do that I don't think. But there could be a lot of mid-tier universities that see that as their way to continue to stay in business. Because without it, they could easily disappear. It seems to me this is the scenario as crunch time arrives. (Interviewee A1, provost, USA)

The responses from some of the participants indicated that they were developing the opinion that the role of senior leader is likely to change as the purpose for universities continues to evolve. For example, a senior leader, speaking about how to bring the internal staff in the university on the journey to ensure future sustainability, commented, “the hardest part of this is to get people to see the problem, figure out how to make them see that this will affect them too” (Interviewee C1, vice-president, USA). Another senior leader claimed, “for me it's about hearts and minds, how do we bring everyone along the journey” (Interviewee H1, president, China). In other words, how to preserve the values inherent to the idea of a university with the challenges and opportunities presented by marketisation creates a dilemma for senior leadership. While the university community appears to be somewhat aware of the dilemma, the responses from these participants suggests that there will be no material change to current behaviours unless there is strong and committed leadership with a considered and compelling plan for change.

Afshar (2016), Birnbaum (1989), Bolman and Deal (2017) and, O'Reilly and Tushman (2013) claimed that in an effective leadership situation, the leader is an advocate, whose leadership style may include coalition building. Importantly, the responses from some of the participants in this research suggest that this may require the formation of new coalitions,

new power bases, where changes typically are achieved through negotiation, and the presentation of a new and compelling vision for success. However, for eight of the participants there was a concern (or hope, depending on the perspective) that these new coalitions could reinforce traditional norms, and therefore the required change in leadership style would not occur. For example, in discussing how senior leadership is approaching the challenges of constructing brand in the twenty-first century, a senior leader commented, “in an organisation as complex as a university, where substantial change is planned, senior leadership will be required in the first instance to manage the inevitable conflict” (Interviewee E3, acting vice-chancellor, UK). This demonstrates that the senior leader in this university is likely to maintain the role of referee, and not adapt to present a clear vision for the future. In a similar way, a senior leader, stated:

Well, of course we have been dealing with marketisation for many years, decades in fact, but that doesn't mean I as a senior leader will now need to shift my approach just because we have yet another challenge to manage.
(Interviewee J1, deputy vice-chancellor, Australia)

In contrast, another senior leader said, “I think what the university community is seeking is a clear vision for the future, a confidence that we are on top of the problems and determined to find a way through” (Interviewee C1, vice-president, USA). As the discussion continued, it became clear that, although there was recognition of the need to find a new vision, the senior leader was proposing to do this through a coalition of academics and, by inference, the marketer would be required to compromise their approach to brand development. He said, “we have a strong academy here and the minds will come together to work out the best way forward”. In an interview with another senior leader, she observed that the goal is “to empower employees, the key is to give them the opportunity to contribute to our future direction and let them know you trust them to work collaboratively in everyone’s best interests” (Interviewee K3, assistant vice-chancellor, Australia). However, again, when probed further she expressed doubt, the reality being that left to its own devices the members within the university will, “adopt passive aggressive

strategies because eventually the university leadership will give up and we will continue on as before” (Interviewee K3, assistant vice-chancellor, Australia). A senior leader in China spoke about balancing the need to enact change against political influences. She remarked, “there are certain constraints that need to be considered when making decisions about future strategies. It would be naïve to think otherwise” (Interviewee H1, president, China).

Perhaps the question to be asked is whether the role of the senior leader will remain committed to the traditional idea of the university in the face of the reported strategic challenges in constructing a brand in the twenty-first century? Indeed, will the role of the senior leader, one that appears from the responses to be one more closely aligned to that of a referee, be maintained in the face of these challenges? In many of the interviews with the participants the responses suggested that while this issue was being discussed at their universities, albeit in early stages, their views were not completely formed. It could be argued that the consensus style of leadership may be sufficient to resolve the internal challenges that the participants identified. However, pressures from the markets that universities engage with will likely require senior leadership to enact change and respond with plans and strategies that many of the participants may find uncomfortable. This may have the effect of exacerbating existing tensions even further.

Notwithstanding the uncertainty about how the role of senior leader might change, it could be argued that the ability, or otherwise, for senior leaders to navigate a future direction for universities, achieve consensus about brand positioning and adopt strategies to manage potential disruptions, may be a difficult challenge. It was demonstrated in Chapter 3 that universities are a unique type of organisation, influenced and impacted by government policy settings, and do not behave like a traditional commercial organisation in its approach to decision-making and change (Afshar, 2016; Julius, Baldrige & Pfeffer, 1989). With respect to senior leadership, for many of the participants, it was not so much that there was an unrealistic idea of what the challenge was, it was more about how to

develop inclusive strategies to lead universities through the complex environments and markets that they participated in.

The responses from the participants highlighted the challenges of enacting change in universities compared to a traditional commercial organisation. The dilemma for the senior leadership appears to be how to balance the need to construct a differentiated brand identity to effectively engage in highly competitive markets against the values inherent in the idea of a university.

Conclusion

The common thread across the findings from the three themes that have been presented and discussed in this chapter was tension. There was tension between the academics and the marketers as they competed for the support of senior leadership, and tension as senior leadership determined the most effective strategies to navigate universities through the challenges that are confronting them. It appears that the dilemma for senior leadership is to balance the values inherent to the idea of a university with the challenges and opportunities presented by marketisation. How the senior leaders of universities are likely to respond to this dilemma and, attempt to navigate the future direction for the organisation, was of keen interest to many of the participants.

I remind the reader that for the purposes of this study, the role of senior leader was defined in Chapter 4 as a Vice-Chancellor, President, Provost or designate – a role more akin to the Chief Executive Officer (CEO), or Managing Director of a traditional commercial organisation. The university council/senate, government, employers and students are stakeholders that play a part, and not including these stakeholders is recognised as a limitation on this study.

This chapter contributes to the response to the third of the research questions that concerns the role of leadership as universities construct their brand identity in the future. It appears that the adjudicating role that the participants described for the senior leader may need to change in the

face of the strategic challenges presented and discussed in Chapter 5.

For the senior leaders in the UK this appeared to present challenges that were particular to that country. The participants identified that there was a strong commitment to the pull of history and tradition. The senior leaders in the UK expressed a view that their legacy was connected to their predecessors, and that they were responsible for ensuring that the core values that they had been entrusted with would continue to be enshrined within their institutions. Therefore, the senior leaders in the UK were reluctant to pursue strategies that were not consistent with their missions. In contrast to the UK, the participants in Australia, China and the USA seemed more willing to adapt to changing circumstances and interpret their mission more liberally to take advantage of the opportunities presented by the knowledge economy.

In the earlier two chapters where I discussed the findings from this study, it was reported that the strategic challenges for universities in constructing a brand in the twenty-first century might require a more traditional, market-driven approach. In this chapter, the responses to questions about how leadership considers brand, develops strategies for enhancing prestige, and responds to government policy settings, suggested that most of the participants viewed the role of the senior leader in the university as more akin to a referee or adjudicator, focused on achieving, or preserving, consensus in the organisation. This adjudicating role is also evident in university brand positioning, the participants observing in Chapter 6 that the construction and communication of brand identity appears to be a compromise between the competing interests in the university. However, one of the strategic challenges for the construction of the university brand in the twenty-first century, discussed in Chapter 5, is digital disruption. A key implication of the higher level of authenticity that is required by digital disruption is that the current isomorphic, or homogenous, approach to university brand communications is likely to come under greater scrutiny. As this compromised brand positioning comes under pressure, the tensions between the roles in universities, described in Chapter 6, may be accentuated as senior leadership seeks to achieve consensus.

The response to the third research question appears to be connected to the response to the second of the research questions that concerns the internal challenges that universities experience as they construct their brand identity. That is, in order to manage the strategic challenges identified in Chapter 5, the role of the senior leader may need to change to one more like the senior leader of a traditional commercial organisation for universities to effectively construct their brands in the future.

The participants described the challenges confronting universities as they constructed their brands as complex. The subsequent pressure on university senior leadership to present a strong vision for the university, develop and implement plans that are communicated as important for the organisation as a whole, and embed a shared belief in all of the universities stakeholders that the future direction should be supported, appears to be increasing.

An integral component of this vision is alignment between corporate strategy and brand strategy, with academics such as Aaker (2014), Galbraith (2016), Holt (2002) and Liedtka (1991) advocating that a key responsibility for the senior leadership of an organisation must be to ensure that everyone in the organisation is properly aligned and supportive of the brand values. Accordingly, the ability, or otherwise, for universities to either adapt to the changing expectations of external stakeholders (reposition/reconstruct its brand identity), to reinforce the traditional benefits of a university education (shape the construction of brand image) or, stretch brand positioning to incorporate both core business models and new business models may be related to how effective senior leadership is in convincing its people about the challenges confronting them, and the strategies needed to manage them.

Chapter 8 - Conclusion

Introduction

The overarching research objective of this thesis was to explore how the challenges of constructing a brand in the twenty-first century are impacting on the idea of a university. The research questions for this study were:

Research Question 1. What are the strategic challenges for universities in constructing a brand in the twenty-first century?

Research Question 2. What are the internal challenges that universities experience as they construct their brand identity?

Research Question 3. What is the role of leadership as universities construct their brand identity in the future?

This inquiry adds to the growing body of work which has investigated university branding and the idea of a university. It also contributes to our understanding about how universities are likely to respond to challenges such as disruptive innovation, changing expectations about the purpose for universities, digital disruption and a diminution in the value of the credential. The study has used Social Constructionist Theory and applied a thematic analysis based on Berger and Luckmann's (1966) conceptual framework in *The Social Construction of Reality*. Social Constructionist Theory was found to be a useful research tool to examine how a participant's role, cultural perspective, experience and perceptions about the future influenced their construction of the university's brand identity and the idea of a university.

There is little research that explores the intersection between the application of disruptive innovation to the university, how universities might respond to disruption and the subsequent effect on the construction of the university's brand. The semi-structured interview method enabled me to probe the participants viewpoints to obtain deeper and more substantive responses in order to gain rich insights, explore issues, meanings and experiences. This explicated differing perspectives about whether there

was any imminent threat to the university business model from disruptive innovation.

The methodology also proved important as a tool to make sense of complex situational, cultural and political settings. By highlighting the different roles inside universities, the interplay between the competing interests in universities as the brand is constructed and communicated provided valuable insights in exploring how the participants accounted for apparent tensions.

Finally, the use of Social Constructionist Theory supported researcher reflexivity by raising awareness of how various factors (for example, relations with participants and researcher beliefs) shaped research activity.

In contrast, the study found that using thematic analysis is not without difficulties. The use of semi-structured interviews provided a rich representation of the participants experiences, views and perspectives, but it also made the interpretation of data a more complex process. As a constructionist method, thematic analysis was used to examine the ways in which perceptions were the result of a range of interactions occurring within society or within universities. At times it was a challenge not to allow my own role as an executive in a university to bias the interpretation of the data and misrepresent the participants views.

Given further opportunity to extend this study, expanding the selection of participants to provide an external/consumer perspective could assist in contributing to knowledge about the impact on brand image from challenges such as disruptive innovation and the changing expectations of external stakeholders about the purpose of universities.

The common thread identified through almost all of the interviews was tension. There was tension as universities constructed and communicated their brand identities; tension as most of the participants perceived that some external stakeholders had constructed different ideas from them

about what a university is and represents; and, tension as many of the participants observed senior leadership determining the most effective strategies to navigate universities through the complex internal and external challenges that they were confronting.

How the participants accounted for these tensions was of critical concern to this study. I concluded that at its core these tensions were as a result of universities seeking to balance the influences of globalisation and marketisation with the inherent desire to protect the traditional idea of a university.

Research Question 1: What are the strategic challenges for universities in constructing a brand in the twenty-first century?

The participants discussed six current and future strategic challenges; the role of government; the perceived diminution in the value of the credential; changing expectations from some external stakeholders about the purpose of the university; the authenticity required by digital disruption; the emergence of new tailored academic programmes for students, referred to in this thesis as personalised education; and, disruptive innovation.

In their view these challenges had contributed to a disparity between the brand identity and brand image of universities. According to most of the participants in this study, the shared experiences and perspectives of key external stakeholders had shaped a brand image that encompassed a purpose for the university that may be different from how universities had constructed and communicated their brand identities. In particular, the participants referred to employers, who appeared to the participants to have shaped an idea of the university as producers of job-ready graduates and human capital. It was identified that one of the key consequences of this apparent shift in the expectations of universities by some external stakeholders was a diminution in the value of the credential. The view expressed by the participants was that this perception might flow through to students and therefore impact on enrolments. Milligan and Kennedy (2017) described the credential as the heart of the university's business

model. According to the participants, if the value of the credential continues to decline, this may in turn have a substantial impact on the 'product' that a university has to 'sell'.

The participants in the USA and, to a lesser extent, the UK identified that they may themselves be contributing to the changing expectations of universities by external stakeholders through the promotion of a spirit brand. Typically, the spirit brand manifests in an emotional connection through the student experience, as opposed to academic and research programmes (Bok, 2003). In the USA the spirit brand was raised by the participants in discussions about high profile athletics programmes and in the UK, it was discussed by the participants in reference to historic colleges, or residences that formed part of the university campus. The concern expressed by the participants was that their promotion risks trivialising and diverting attention away from the important work of academics.

The brand disparity has the potential to widen into the future. A catalyst for this appears to be related to the rapid development of digital technologies. When these occur at a pace and magnitude that disrupt established ways of value creation, social interactions, doing business, and more generally our way of thinking it is described by some as digital disruption (Edelman 2010; Garman, 2014; Kenney, Rouvinen & Zysman, 2014). Numerous writers support the view that this has created a scenario where the cumulative experiences and perceptions of consumers about an organisation are more influential on brand image than the organisation's assertions about its brand identity (Aaker, 2014; Booth & Matic, 2011; Edelman, 2010; Mattin, 2017; Nakamoto & Shulz, 2010; Tynan, McKechnie & Chhuon, 2010).

This environment has enabled new providers to deliver higher education products and services to markets that universities have either overlooked or not considered. The corresponding increase in preferences for micro credentials and personalised education has the potential to satisfy the changing expectations of some of universities external stakeholders.

Christensen, Raynor and McDonald, (2015) wrote that disruptive innovation has occurred when a “smaller company with fewer resources is able to successfully challenge more established incumbent businesses” (p.3). The hurdle that the new entrants encountered as they attempted to acquire market share from incumbents has been to overcome the inherent value of the credential offered by universities. However, the participants suggested that if the value of the credential continues to diminish this may clear the way for the new providers to move into the traditional markets for higher education. This scenario appears to fit within the description of disruptive innovation (Christensen, 1997; Christensen, Raynor & McDonald, 2015). According to the participants, the dilemma for senior leaders is to adopt strategies that on the one hand seek to preserve the idea of a university and, on the other hand, explore new models that can satisfy the new demands and challenges from their external stakeholders.

Research Question 2: What are the internal challenges that universities experience as they construct their brand identity?

There was almost unanimous agreement from the participants about the need for universities to be engaged with marketing activities in order to ensure financial sustainability in increasingly competitive domestic and international marketplaces. The participants referred to strategies to find students, staff, research funding, commercial revenues and philanthropic donations. However, it was apparent that for many of the participants this was a source of tension and, in some cases, frustration.

According to most of the participants in marketing roles, the construction and communication of the university’s brand identity was a compromise between the academic and non-academic parts of the university. A major reason for the compromise was that universities were either unwilling or unable to prioritise academic areas of interest. An important distinction raised by the participants may account for this compromise. In contrast to the participants in marketing roles, most of the participants in an academic role implied that they worked ‘at a university’ and not ‘for a university’. This

distinction may also highlight why they were more reluctant to invest themselves in the branding process. The compromise, which appeared to be causing a higher level of frustration for the participants in a marketing role, focused brand positioning on 'soft values' that may stretch to a way of thinking, an aspect of the student experience or an approach. The findings suggested that this compromise was under pressure as universities attempted to manage the challenges and opportunities presented by marketisation, digital disruption and globalisation.

Research Question 3: What is the role of leadership as universities construct their brand identity in the future?

Some of the participants identified that the process and skillset required for a senior leader in a university is different from the senior leader of a traditional commercial organisation. For these participants the senior leader was viewed as a construct that most resembled a referee, adjudicating between the academic and non-academic parts of the university. However, this role may need to change in order to respond to the challenges of constructing their brand identities in the future (Afshar, 2016; Christensen, Raynor & McDonald, 2015; Lucas, 2015; O'Reilly & Tushman, 2013).

Many participants were frustrated by how universities were responding to the strategic challenges outlined in the response to research question 1, together with the opportunities and risks presented by marketisation, the knowledge economy and globalisation. However, the senior leaders that were interviewed said that they were being pressured to enact change amid a climate of constant change, most of which was out of their control. They reported that successive governments had imposed regulation and modified funding arrangements in response to agendas that on the surface were intended to promote a competitive market but in reality, most believed were designed to relieve pressure on the public purse.

In response to challenges, institutions may need to break with aspects of their tradition and reinvent aspects of the way they work (Bok, 2015;

Christensen & Bower, 1995; Dill, 2003; Jongbloed, 2003; O'Reilly & Tushman, 2013). For example, the literature suggests that organisations should seek to either reposition their brand identity so that it is closer to brand image or, implement activities to shape the brand image construct to align with desired brand identity (Aaker, 2014; Holt, 2002; Temporal, 2002). How to do this and preserve the purpose, or idea, of the university may require universities to adopt new approaches.

Achieving consensus about the future direction for universities also appeared to be a complex process. According to the participants, the changes required to meet the demands of constructing their brands in the twenty-first century and specifically, construct a brand identity that balances the needs of its external stakeholders with the inherent desire to preserve the traditional idea of a university, may require a change in leadership style.

In considering whether a strategy or approach would work for all senior leaders potentially ignores specific factors such as history and culture that might be unique to that country. For example, in the UK the responses suggested that there were challenges particular to them. The participants identified that there was a strong commitment to the pull of history and tradition. They expressed a view that their legacy was connected to their predecessors, and that there was a responsibility to ensure that the core values that they had been entrusted with would continue to be enshrined within their institutions. Therefore, the senior leaders in the UK were reluctant to pursue strategies that were not consistent with their missions. In contrast to the UK, the participants in Australia, China and the USA seemed more willing to adapt to changing circumstances and interpret their missions more liberally to take advantage of opportunities.

Implications

Researchers and commentators suggest that the construction of the brand is a relatively simple process that focuses on differentiating attributes that culminates in a brand personality (Aaker, 2014; Holt, 2003; Keller & Lehmann, 2004; Nakamoto & Shulz, 2010). However, universities are

complex and unique organisations and, given the breadth of their areas of academic interest, the ability for universities to reach consensus about brand positioning is a similarly complex process (Bok, 2003; Chapleo, 2011; Mampaey, Huisman & Seeber, 2015; Napoli, Dickinson, Beverland & Farrelly, 2013).

According to the participants, the end result appears to be a compromise that reflects an institution more comfortable with 'soft values' such as tone, location and ethos rather than true differentiating traits such as prioritising academic and research strengths. These findings are consistent with the literature, where the unique nature of universities as an organisation type and the apparent sameness that is a feature of university branding are discussed (Bok, 2003 & 2015; Deephouse, 1999; Di Maggio and Powell, 1983; Donoghue, 2008; Julius, Baldrige & Pfeffer, 1989; Mampaey, Huisman & Seeber, 2015; Toma, 2012).

Universities appear to be focused on positioning strategies that aim to increase prestige and enhance their legitimacy (Bok, 2015; Deephouse, 1999; Donoghue, 2008; Mampaey, Huisman & Seeber, 2015; Marginson, 2007b; Neave, 1998; Peters, 2017; Toma, 2012; Wedlin, 2014; Wexler, 2016). There are claims of difference but all universities are essentially doing the same thing and therefore the preference of universities is to differentiate only on the surface. This limited differentiation means that university brands exist within parameters or a frame (Davis, 2012 as cited in Hilmer, 2012; Mampaey, Huisman & Seeber, 2015; Toma, 2012). In other words, the existing literature suggests a compromise between the competing interests in universities as they seek to find the balance point where they are able to differentiate only as much as it is legitimately possible to do (Deephouse, 1999; Mampaey, Huisman & Seeber, 2015; Zemsky, Wegner & Massy, 2005).

The findings from this study suggest that this compromise is likely to be placed under pressure as universities confront the challenges of the twenty-first century. The participants identified that the authenticity demanded by digital disruption, changing expectations of universities by

some of their key external stakeholders, the decline in the value of the credential and, the emergence of new online providers has the potential to disrupt higher education. However, it appears from the responses that there is a research gap in terms of understanding the intersection between the idea of a university and how universities might respond to the challenges of disruptive innovation.

Researchers generally agree that employing an *ambidextrous orientation* is an appropriate strategy to manage disruptive innovation (Alpkan & Gemici, 2016; Charitou & Markides, 2003; Melewar & Nguyen, 2014; O'Reilly & Tushman, 2013). This has the effect of balancing the immediate and long-term needs of the organisation simultaneously (Christensen & Bower, 1995; Christensen, Raynor & McDonald, 2015; O'Reilly & Tushman, 2013; Yu et al., 2014). At the same time, an ambidextrous orientation is also difficult to achieve, because exploratory and exploitative opportunities tend to compete for the same limited resources, placing conflicting demands on the organisation. This raises the risk of brand ambiguity as the brand identity is stretched to accommodate potentially divergent interests (Aaker, 2014; Holt, 2003; Temporal, 2002; Yu et al., 2014).

It appears from this study that, for universities to adopt an ambidextrous orientation to meet the challenges of constructing their brands in an environment of disruptive innovation, there may need to be a significant change in the way universities are led. The consensus approach that seeks to preserve the current status is less likely to generate positive results. In other words, the visionary and directive style recommended as necessary by Afshar (2017), Birnbaum (1989), Bolman and Deal (2017), Lucas (2015), O'Reilly and Tushman (2013) and Smith (1994) to enact the necessary change to meet the challenges of constructing brand in the twenty-first century does not, according to the majority of the participants, appear to be the preferred approach in universities.

If universities are to meet the strategic challenges of constructing their brands, they will either not follow conventional approaches, and therefore

stretch our understanding of how an organisation responds to disruptive innovation or, they will change to resemble a more traditional commercial organisation to adopt an ambidextrous orientation. In this scenario there is the potential to further stretch our understanding of the idea, or purpose, of universities.

An important caveat to universities adapting new approaches to confront the challenges identified by the participants was the role of government. For most of the participants government policy settings, and in particular compliance and funding regulations, were influencing decision-making and planning strategies.

The literature suggests that there is no true free market for higher education and this is primarily because there are policies and regulations imposed by governments to restrict pricing, quality and access (Adonis, 2017; Bok, 2003 & 2015; Chapman, 2012; Dill, 2003; Jongbloed, 2003).

The participants suggested that the role of government was a major reason why universities were unable to untangle themselves from administrative processes, and adopt a nimble approach. They spoke about the impact of changes to policy settings, particularly changes that impacted on funding and reporting requirements, as being inhibitors to change. Many of the participants referred to the contradictory directions from government. For example, policies that moved from increasing pressure on universities to increase enrolments, and then oscillating to incentives to retain, or even reduce their student numbers. Other participants expressed frustration about the threat of deregulation from the government of the day, followed by a new government intent on increased regulation, as being impediments to effective planning.

For many of the senior leaders the additional burden of government compliance and unpredictable revenues was placing universities at a competitive disadvantage. Accordingly, some of the participants advocated for government to take a less intrusive position with respect to their policy settings.

Final thoughts

It seems likely that the value of the credential will continue to decline as employers seek a different skilled workforce. This may have a substantial impact on the 'product' that a university has to 'sell' and as a consequence the brand identity of universities may need to reposition.

As external stakeholders, such as employers, students and government, continue to exert their influence, and universities have to respond by producing programmes focused on employability, three possible scenarios seem inevitable.

The first reflects the traditionalist, a strong voice in this study. A back to the future approach, where universities revert to their core idea as places of learning: "knowledge for its own sake" (Newman, 1852, p.104). In this scenario a market correction may reduce the number of participants.

And/or, because they may not be interdependent, do we have what Craig (2015) calls the *great unbundling of higher education*, where essentially degrees are separated into smaller components that students can elect to study because they are specific to a profession. For example, tailored and personalised education programmes. Many of the participants that were relatively new to the higher education sector were inclined to this approach. In this scenario, universities shift away from their traditional business model. There is a risk for universities as they seek to satisfy the demands of external stakeholders by constructing brand identities that more closely align with brand image. The traditional commitment of the academic faculty *to their devotion* (Parsons, 1971) may be further confused with the articulated values of the university brand. This may generate further tensions as the university *saga* (Clark, 1972) evolves or, as some of the participants might say, dissolves.

In the third scenario, universities may implement strategies to simultaneously exploit their current market and business model and explore new autonomous business models that will ensure long term sustainability. For some of the participants this is a likely scenario if the

disruptive forces that they identified as challenges for universities continue to exert influence. In doing this, universities can both evolve to become relevant to future needs and, at the same time stay true to their essential purpose. Put another way, remain committed to the ideals of academic freedom, the pursuit of knowledge and the role of critic and conscience of society, and yet continue to innovate by adopting an ambidextrous orientation (Alpkan & Gemici, 2016; Charitou & Markides, 2003; Melewar & Nguyen, 2014; O'Reilly & Tushman, 2013).

Limitations of this research

Although all of the work reviewed was analysed in considerable detail, it is inevitable that another researcher may have categorised the literature differently. This limitation suggests that the conclusions will require confirmatory work by other scholars.

During the course of this study it was recognised that the small sample represented a limited range of experiences and perspectives. I chose to interview senior leaders, the senior marketing officer and an academic dean in each of the universities that agreed to participate in this research. The reasons for doing so were outlined in Chapter 4. However, there are other interviewee types, such as trustees and ministers of government, that may also have been able to contribute to this research through their particular role. Their perspective, particularly in relation to how external stakeholders constructed the idea of a university, was not considered in this research study.

The participants referred to the impact of and on stakeholders, particularly graduate employers, yet the views of this group were not obtained. In addition, the academic perspective was obtained from those in very senior roles and the views of other academics outside this group were not represented. The voice of students was also missing from this study.

There was logic in selecting the universities and the national systems in which they were located for investigation. Nevertheless, the world of universities is a large one and as policy settings differ from system to

system extrapolating the findings to the whole university world is a risk.

A further limitation of is that the technique used, although restricted by the criteria developed, tended to depend upon the interpretation of the interviewee's responses by the researcher.

Future research

This research has observed that constructing brand in a university context is not the same as constructing a brand in a traditional commercial organisation. Having established that there is a difference, it stands to reason that the traditional models that institutions, particularly marketers, use as tools to guide the development of strategies to manage university brands may need to be different, or at the very least adapted from traditional models. Similarly, the tools that universities adopt to identify areas where university brands are weak, or where universities might need further investment, may also be different.

In addition, future research that builds on this study could consider the inclusion of external stakeholders such as employers and students. These perspectives could assist in contributing to knowledge about the impact on brand image from the challenges identified by the participants in this research.

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Appendices

Appendix A: Proposed Interview Themes

I am interested in exploring how the university arrives at its desired brand positioning, how the university differentiates itself from competitors and how developments that could impact on the university brand are being managed within the institution.

I am similarly interested in understanding the aspirations of universities and colleges of various types and how much similarity or difference is there in these aspirations.

Do these aspirations typically boil down to enhancing institutional prestige?

Are there different aspirations even within an organisation?

In the interviews with the leadership of the university I am seeking to understand; the aspirations for the institution he or she has defined and regularly articulates; how important it is for the institution to be perceived to be moving toward greater prestige; what factors can/are affecting the drive for greater prestige; and what are its points of reference relative to measuring prestige.

Note that these are some of the experiences I am interested in exploring with you however this list is not exhaustive and other possible themes may emerge during our interview.

Appendix B: Introductory Letter to Potential Participants

Address

Date

Dear (name of participant)

I am currently studying towards a Doctor of Philosophy (PhD) at the University of Waikato and will be undertaking research entitled Branded house or house of brands: how the evolution of the university brand is impacting on the character of the university.

At its' core this research is hypothesising that the relatively recent arrival of digital disruption, as opposed to other developments that have affected the character of a university since its very inception, threatens the homogenous brand position that universities have traditionally adopted in their pursuit of greater legitimacy. While there has always been sagas within sagas the authenticity and transparency that accompanies and is required with digital disruption requires a similarly authentic and transparent brand position and not isomorphism: where the brand has not ever been clearly differentiated it can no longer continue that way, and therefore the lack of meaningful brand differentiation is no longer sustainable.

My interest in this area has grown from my career as a professional marketer that has worked across a number of industries and segments, and is presently engaged with the marketing of the university. It is apparent to me that the difference between branding in the traditional sense of the firm and branding in a university context is that there is a lack of true brand DNA in the university. This is often masked by a collective desire to seek greater prestige and increased legitimacy however with the emergence of digital disruption this collective desire may be under more pressure than ever before.

I propose to undertake a series of case studies to inform my research and I would like to invite you to take part in this study. Further details about what your participation in the research might involve, a participant consent form, and a copy of the proposed interview themes are attached to this letter, for your information.

Please feel free to contact me by email, phone, or letter if you have any further queries about this study. Alternatively, if you would like to discuss the research with someone other than myself, please feel free to contact my chief supervisor, Professor Roger Moltzen, at the University of Waikato. Our contact details are listed below:

David Craig (Researcher)

Professor Roger Moltzen
(Supervisor)

Phone: 07 838 4295

Phone: 07 838 4695

(work)

Email: dcraig@waikato.ac.nz

Email: rim@waikato.ac.nz

I hope you see this study as worthwhile and will agree to participate in the research. I look forward to hearing back from you soon.

Yours Sincerely,

David Craig

Appendix C: Participants Information Sheet

Prior ethical approval for this research has been obtained from the Faculty of Education Research Ethics Committee at the University of Waikato. The following information is provided to assist you to make an informed decision about your participation in this study.

Research procedures:

I would like to spend 60 to 90 minutes talking with you about your experiences of regarding the development of the university brand. The interview will be audio recorded and transcribed by me and you will be given a copy of the transcript to review and edit. I would also like to remain in contact with you by email for a short period of time after the interview, in the event that I need to clarify any information you have given me. Some participants may also be invited to attend a follow-up interview at a later date, but you are under no obligation to accept this invitation.

Confidentiality and use of the interview data:

As a participant, you may choose to remain anonymous or be identified by your real name in this research. Your interview transcript will remain confidential and every effort will be made to maintain your anonymity, if you choose. The consent forms will be stored in a locked filing cabinet in my office at the University of Waikato. The interview recordings will be erased once they have been transcribed. The written transcripts will be stored separately. Non-identifying information will be archived for a minimum period of five years, as required by the University of Waikato regulations for postgraduate research.

Publication of the findings:

Extracts from your interview transcript will be published in my doctoral thesis that will be held in the University of Waikato library and will become available electronically. These extracts may also be used for academic publications and conference presentations related to the research. A summary of general themes and findings will be made available to all participants at the conclusion of the research.

Your rights:

You may decline to participate in the research without giving any explanation and have the right not to answer specific questions, if you so choose. You are entitled to access and correct any personal information that is collected about you prior to publication of the final thesis. You may also withdraw from this study at any time, up until you have returned the interview transcript.

Informed consent:

A consent form is included with this letter, along with a stamped, addressed return envelope for your reply. If you agree to participate in this study, I will make contact with you to arrange a convenient time and location for an individual interview. A copy of the proposed interview themes is also attached, so you have an idea of what kinds of topics are likely to be discussed.

Further information:

If you have any questions or concerns about the research that you would like to discuss with someone other than me, you are welcome to contact my chief supervisor, Professor Roger Moltzen, at the University of Waikato:

Phone: 07 838 4695 (DDI)

Email: rim@waikato.ac.nz

Appendix D: Participants Consent Form

I have been informed about what is involved in the research and freely consent to take part in this study. I understand that this will involve a 60 to 90 minute interview with David Craig, followed by further email communication for the purpose of clarifying information. I am aware that some participants may be invited to attend a second interview, but have been advised that I am under no obligation to take part in this.

I understand that the individual interview will be audio recorded and transcribed by the researcher and that I have the right not to answer specific questions, if I so choose. I am aware that I can access and correct any personal information collected about me prior to final publication of the thesis and that I am able to withdraw from this study at any stage up until I have returned the interview transcript.

I consent to the use of brief extracts from the interview transcript in the written thesis and am aware that this will become available electronically. I also consent to this information being used for academic publications or conference presentations related to the research. I understand that I may maintain my anonymity in the dissemination of the research.

Name: _____

Address: _____

_____ Postcode: _____

Email: _____

Telephone: _____ Mobile: _____

Signature of participant:

_____ Date: _____

Name (please print): _____

Please return this form to David Craig using the stamped, addressed envelope provided

Appendix E: Lead questions

1. How aware is the leadership of the university about what is going on at their peer and aspirational institutions, as well as with their local competitors?
2. Is the issue of brand a topic of discussion at the senior levels of the university?
3. How does the university feel about brand and how is it articulated at this university?
4. Do you think that the university differentiates between marketing and brand?
5. Similarly does the university have a clear strategy around reputation (enhance or protect)?
6. Universities tend to aspire to greater prestige. What constitutes prestige at an institution such as theirs? Who do you aspire to and why? Russell Group?
7. What various constituents perceive that enhanced prestige brings to an institution?
8. Why he or she thinks positioning for prestige is such a necessity across much of higher education?
9. To what extent does government policy influence university decision-making? For example tuition fees, quality/information requirements and research funding. Recent white paper on the knowledge economy (incentivising comp)
10. Should higher ed markets be regulated at all? Compare the USA market with the rest of the world?
11. When decisions are being made does the university consider brand, strategies to enhance prestige or reputation?
12. What the risks are of positioning for prestige? For example prompting may include increased external control, need for funds, alienation for traditional constituencies, and, ultimately, overall expectations.
13. As an academic/professional how do you determine what new programmes to introduce?
14. How do you think consumers differentiate university brands?
15. How important are the various league tables and rankings systems?
16. What brand strategies his or her institution has had the most success with?
17. How does the university measures brand success?
18. What impact do you think that the 2012 fee increases have had on student decision-making and how is the university managing student expectations? Is value-for-money a concept that has evolved/emerged?
19. How important is academic research for new knowledge to the brand of the university?
20. Whether it is realistic to opt out of brand or prestige development, saying, in effect, “we are doing fine and should relax”?

21. How has the emergence of digital disruption impacted on the institution? Or perhaps how does the leadership see digital disruption affecting the university brand?
22. There has been a lot of literature recently about the value of a university degree, the rapid expansion of university enrolments and perceptions of quality. Is this a concern to this university?
23. Do you think that the idea of brand has in anyway impacted on the character of the university? For example the focus on graduation destination/employability?
24. What is the future for the credential? Is it under threat?
25. What is the future for the university? For example what might happen if students suddenly decided they didn't need a degree to get a better job?