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Southampton Education School

Understanding the Interaction between a University and Promotional Services – a Case Study

by

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ABSTRACT

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Increasingly, universities outsource promotional services to external providers, yet there is limited understanding of such a phenomenon. This thesis focuses on deconstructing the changing landscape of the higher education (HE) market and marketing for HE through an original lens, the relationship between a public institution and commercial organisations; that is, a university and promotional services. This work recognises the multidisciplinary nature of such a research problem and chooses the philosophy of critical realism to guide the research process and analysis. This critical realist philosophy encourages the researcher to combine not only methods but disciplines and theories. This research therefore uses the lens of a number of theories and concepts from the marketing discipline (such as the IMP Interaction framework, the 4P Marketing Mix), the economic discipline (economic market mechanisms, theoretical values of the market) and education (theoretical values of education). These theories are used to reflect critically on collected data (interviews with university marketing staff and promotional services' staff, and documents) and to re-develop a theory that helpfully captures the nature of the university–promotional services interaction. The re-developed framework illustrates the complexity of the relationship and enhances our understanding of universities' outsourcing practice, and universities' and promotional services' marketing practice and values. The results indicate, for example, that general arguments for or against outsourcing cannot be applied because of the specific nature of each outsourcing contract and the highly complex structure of university organisation. The latter strongly influences its marketing practice and interaction with promotional services. It was observed, for example, that there is a certain consensus between university marketing departments and promotional services in terms of ways of working and related operational values. However, there is great variation between individual marketing personnel and a degree of conflict between university marketing departments and academics. This influences the marketing function of the university and consequently the interaction between the university and promotional services.

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Declaration of authorship

I, Eva Nedbalová

declare that the thesis entitled

Understanding the Interaction between a University and Promotional Services – a Case Study

and the work presented in the thesis are both my own and have been generated by me as the result of my own original research. I confirm that:

- this work was done wholly or mainly while in candidature for a research degree at this University;
- where any part of this thesis has previously been submitted for a degree or any other qualification at this University or any other institution, this has been clearly stated;
- where I have consulted the published work of others, this is always clearly attributed;
- where I have quoted from the work of others, the source is always given. With the exception of such quotations, this thesis is entirely my own work;
- I have acknowledged all main sources of help;
- where the thesis is based on work done by myself jointly with others, I have made clear exactly what was done by others and what I have contributed myself;
- part of this work will be published in December 2014 as:

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Signed: ………………………………………………………………………..

Date: ………………………………………………………………………….

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Definitions

In order to establish shared meaning, a number of key terms are defined in this section. The terms are in an alphabetical order.

Abduction

Abduction in this thesis refers to epistemological procedure and level of theorisation relating to critical realist philosophy. Abduction incorporates 'the framing and reframing of the empirical phenomena within differing theoretical frameworks, the objective of which is the identification of the framework that best explains the phenomena' (Ryan, Tahtinen, Vanharata, & Mainela, 2009, p. 14).

HE market

The market, in economic theory, is 'a means of social coordination whereby the supply and demand for a good or service are balanced though the price mechanism' (Brown, 2011, p. 11). Currently, the supply and demand for HE is not entirely balanced through a price mechanism. However, the UK government often uses economic market theory to justify changes to the HE environment.

The market may be also understood from a marketing perspective. In marketing a 'market' signifies a specific customer group (AMA, 2014).

Market research

Market research is a marketing concept that stands for 'the systematic gathering, recording, and analysing of data with respect to a particular market, where market refers to a specific customer group' (AMA, 2014).

Marketing for HE

Marketing is a process that helps to create exchanges of goods in the market. This is achieved by formulating and implementing marketing strategies (Peter & Olson, 2005). Marketing for HE, therefore, is the process of creating and applying strategic approaches in order to enable exchanges of HE goods in the HE market.

Marketisation of HE

Marketisation of HE is the process of applying economic market logic to HE (Brown, 2010). Therefore, in theory, marketisation of HE is characterised by freeing HEIs from the influence of the government and the dependence on the government funding, and letting the price regulate the supply and demand for HE.

Marketingisation of HE

Marketingisation is a relatively new term. It was coined by Gibbs (2008) to describe the gradual introduction and use of marketing techniques in HE and the problems associated with an uncritical application of marketing thinking to education.

Mechanism

Mechanisms, within critical realist philosophy, signify ‘nothing other than the ways of acting of things’ (Bhaskar, 1975, p. 14) or ‘features of things which produce certain outcomes given certain inputs’ (Collier, 2011, p. 8). Such mechanisms are central to critical realist explanation, which is based on the ‘Mechanism + Context = Outcome’ formula (Pawson & Tilley, 1997).

Retroduction

Retroduction, together with abduction, is another epistemological procedure of the critical realist philosophy. During the retroduction stage the researcher comes back to the collected data and asks additional questions in order to identify the ‘mechanisms that explain what caused particular events to occur’ (Easton, 2010, p. 124). During the retroduction process, elements of induction and deduction may be used. The essence of this method is to continue to ask the question WHY (Easton, 2010).

Abbreviations and commonly used terms

Often used abbreviations:

CR – Critical Realism

HE – Higher Education

HEIs – Higher Education Institutions

IMP – the Industrial Marketing and Purchasing group

Participating organisations and individuals:

A – the Agency participating in this study

C – Corporate Services –representatives/participants of the corporate services/central marketing department of the University

P – the Portal participating in this study

The Promotional services – both the Portal and the Agency (participating in this study) (when a capital 'P' is used)

U – the University (the university participating in this study = the marketing officers and representatives of the corporate services /central marketing department)

MOs – the marketing officers of the University, who belong to the faculties of the University

Introductory personal statement

The first chapter of this thesis explains why it is important for academia and for higher education institutions (HEIs) to study the interaction between universities and promotional services. This section explains why this topic matters to me personally.

The reason I decided to spend four years of my life studying this topic is because in the past I worked for a university marketing department, using promotional services to promote study programmes. I volunteered to work for a promotional service, trying to convince universities to use this specific service. None of these organisations were part of this study.

I found the field of marketing for higher education (HE) fascinating, but I felt like I did not really understand what I was doing and what I was influencing. I felt that I was part of something bigger, but I was too immersed in my work and so could not see the bigger picture. I therefore wanted to research the field of marketing for HE and I chose to focus my studies on the interaction between universities and promotional services because I wanted to use my work experience and to understand the discipline of marketing for HE from a perspective often overlooked by the academic literature: the perspective of practitioners who actually undertake the marketing of HE. I could identify with them. Contrasting the research participants' views with the literature, theories and my own knowledge was a remarkable learning experience.

The thesis is a product of a four-year journey (one year full-time, three years part-time). The aim of this journey was to contribute to the theoretical and practical understanding of the interaction between universities and promotional services. The personal aim was to develop professionally and academically in order to be able not only to understand but to discuss and challenge the discipline. During my studies I undertook a number of part-time jobs. These included interesting and academically stimulating work for Southampton Education School and Southampton City Council, but also night work in a clothes shop. This experience not only helped me to fund part of my studies but to keep my thoughts realistic and down to earth. I believe this is particularly important for a study that contrasts participants' values with the theoretical values found in the literature.

1. Introducing the research problem: The relationship between the University and Promotional services

The research aims to explore the relationships between the University and Promotional services. This will enable us to look at the changing landscape of the higher education (HE) market and understand the discipline of HE marketing through an original lens, that is, the interaction between a public institution and commercial institutions, namely : a University and Promotional services. The changes in the HE environment are routinely identified and named by adding the suffix '-isation' to a specific concept, for instance marketisation, privatisation, globalisation, internationalisation or marketingisation.

Marketisation is the gradual introduction of economic market logic into HE. Privatisation reflects this trend by introducing private capital and ownership into previously public domains (Brown, 2010). Globalisation, with its cultural, political, economic and technological facets, is also related to marketisation because the spread of these facets is based on open market policy (Maringe & Foskett, 2010). Internationalisation is then a more strategically led and localised subset of globalisation.

Marketingisation, on the other hand, is a relatively new term. It was coined by Gibbs (2008) to describe the gradual introduction and use of marketing techniques in HE and problems associated with the uncritical application of marketing thinking to education. What connects all of these processes is the open market and open competition agenda, the essence of economic market theory. This is the reason why the literature review of this thesis adopts economic market theory (Brown, 2010) to guide the flow of the review.

Economic market theory, however, appears to be too distant from the discipline of marketing. The literature usually does not combine these two disciplines and perspectives. The discussion and understanding of both the HE context and the marketing for HE is then fractured and incomplete. In practice, however, these two disciplines interact with and influence each other.

For this reason, the literature review chapter combines the economic market mechanisms – autonomy, price, competition and information (Brown, 2010) – and the basic concepts of Marketing Mix – product, price, place and promotion (McCarthy, 1960). The research problem lends itself into such discussions, because universities and promotional services are embedded in the HE context and use marketing strategies to influence the HE market. In fact, outsourcing promotional services is an example of such a strategy.

There is limited literature on how people working in marketing for HE understand and structure their work (Gibbs, 2004) and how universities outsource marketing services. After reviewing existing academic literature on marketing for HE, one might think that universities are doing all the work themselves and should be praised for their success relating to marketing of HE and blamed for all the problems associated with its techniques. In reality, however, universities increasingly outsource marketing services to external providers. More than in the academic literature, this trend is reflected in public media such as the *Guardian*. However, the information in such media is usually too general (Shaw, 2013) or scandalous (Malik, McGettigan, & Domokos, 2014). Articles are also sometimes written by the promotional services themselves (Annandale, 2014). This could be better considered as a public relation activity of the promotional service than a critical analysis of the phenomenon.

This thesis critically examines this phenomenon. Criticality in this research is achieved through in-depth explanation of the research processes and the use of a number of theories and perspectives to analyse the data. One such perspective relates to the critical voices of some academics who argue that marketing techniques should not be used in HE because they damage the nature of education. The main argument usually revolves around the traditionally different or opposed values of education and the market. The literature suggests (McMurtry, 1991) that universities should maintain education values because market values damage education. Corporate services are, however, external to a university and have no direct obligation to maintain education values. This adds complexity to the research problem. The research questions therefore revolve around understanding what characterises the relationship, what mechanisms make the relationship the way it is and what are the values of universities' and promotional services.

1.1 The research questions

1. What characterises the relationship between the University and Promotional services?
2. Is context important for understanding the relationship between the University and Promotional services and does this comply with the Industrial Marketing and Purchasing (IMP) Interaction theory?
3. Are the values of the University and Promotional services aligned?

   3.1. What are the values of the University and do they conform to the theory of market or educational values?

   3.2. What are the values of the Promotional services and do they conform to the theory of market or education values?

The answers to these questions represent the theoretical and practical contribution of this thesis. The main theoretical contribution consists of developing a theoretical model of University–Promotional service interaction that captures the main characteristics of the relationship. This model is developed by refining a number of existing theories relating to universities and promotional services relationship: IMP Interaction theory (Hakansson, 1982), the theory of education and market values (McMurtry, 1991), the theory of agency–client relationship (Halien, 1997), and theories related to marketisation (Brown, 2010), Marketing Mix (McCarthy, 1960) and outsourcing (Palm, 2001). The re-developed model (presented in the final chapter of this thesis) captures the complexity of the university–promotional services relationships and specifics of such relationships such as the disparity of communication, opinion and ways of working. The model was derived from an elaborate critical realist research process, representing an additional theoretical contribution of this study – Critical Realist (CR) philosophy and methodology to a field is not usually applied to marketing for HE.

The practical contributions consist of a set of recommendations for the practitioners (managers of the University, and marketers of the University and the Promotional services). This thesis and the recommendations enable the participating but also other promotional services to better understand the needs of universities and it helps universities to better utilise promotional services (e.g. by perceiving how the structure of their own organisation influences the relationship with promotional services).

1.2 Flow of the thesis and summary of each chapter

This thesis takes the reader on a journey that first explains the context of the study and the theories underpinning the research process (chapters 2 & 3). The design of the study with the specifics and implications of the chosen CR philosophical framework is then discussed (chapter 4). The scoping study (chapter 5) presents a part of the research process where the basic characteristics of the chosen case study are revealed. This leads to the main study design (chapter 6). Data collected in the scoping study and the main study build the case study description, capturing the voice of the participants (chapter 7). Finally, the results are discussed in the light of the theoretical framework, the model of University-Promotional services relationship is presented, theoretical and practical recommendations are made and the whole process of the research and the research design is reflected upon (chapters 8 & 9). The paragraphs below offer a more detailed description of each chapter.

Chapters 2 and 3: Literature and theoretical review

Following on from the first chapter, the literature and theoretical review position the research problem within the complex discussions on HE market and marketing. First, chapter 2 (the university-promotional service relationship viewed through the marketisation and marketing lens) views the relationship from the perspective of the economic market mechanisms such as autonomy, price, competition and information (Brown, 2010) and the Marketing Mix – product, price, place, promotion (McCarthy, 1960). The review shows that, even though HE is marketising and moving towards the economic market, UK HE does not fully conform to the logic of economic market theory. The review also points out why the economic market logic is problematic for HE. Moreover, this chapter demonstrates that, even though UK HE institutions use a range of marketing techniques and strategies (such as outsourcing promotional services), there is some resentment towards such strategies.

Chapter 3 (Framing the research within a theory of organisational relationships and the theory of education and market values) then extends the argument and develops a more specific theoretical framework for studying the relationship between universities and promotional services. This framework includes the two theories discussed in the literature review and introduces the IMP Interaction theory (Hakansson, 1982), the theory of education and market values (McMurtry, 1991), the theory of agency–client relationship (Halien, 1997) and outsourcing (Palm, 2001).

Chapter 4: Philosophical underpinnings of the study and the research design

The highly complex nature of this research demands a philosophy and research design to support the combination of disciplines and theories. The research uses CR philosophy and design to underpin the knowledge claims and research processes. The work of Bhaskar (1986), Danermark, Ekstrom, Jakobsen and Karlsson (1997) and Sayer (1992) especially is used to underpin the philosophical argumentations and the research processes theoretically. The CR philosophy believes that every knowledge is context dependent and that there are always a number of mechanisms in play. The typical CR explanation revolves around what (mechanism) causes what (outcome) in what circumstances (context). Even though research can never understand the complete truth, it can try to explain phenomena and situations. In order to best explain specific phenomena, CR recommends combining more than one theory, discipline or method. As mentioned above, this research combines the theories and disciplines of marketing with the discipline of economic market and education.

The research uses a case study design. One specific University and two Promotional services are investigated and the research uses semi-structured interviews. It employs the CR analytical framework to analyse the interviews, which allows the researcher to add additional evidence during analysis of the main data collection. In the case of this research, documents (such as the websites of the University and the Promotional services, the budget spreadsheet or University strategy) were used to deepen the explanatory power of the study.

Chapter 5: The scoping study

The scoping study constitutes an important part of the research process, enabling the researcher to gain an initial understanding of the selected University and Promotional service. Three interviews were undertaken during the scoping study of this project (one with the University and two with one of the participating Promotional services). The interviews were analysed by simple coding techniques. This exercise helped the researcher to finalise the idea of using the CR analytical framework as an analytical tool for the main study. The scoping study also enabled the researcher to better understand the specific relationship between the participating university and the promotional services.

Chapter 6: Outline of the main study

The main study draws on the data collected during the scoping study and investigates in depth the relationship between the University and Promotional services. Further interviews were conducted with University marketing officers (MOs), the corporate marketing team of the University and representatives of the promotional services. In total, 23 interviews were conducted (including the three from the scoping study). The interviews with the Portal and University participants were usually between 40–50 minutes long, while those with the Agency were shorter at circa 30–40 minutes long (mainly because of the restricted availability of participants). The interviews were conducted face-to-face, via Skype or by phone.

Chapter 7: Findings and the case study description

The case description captures the research participants' views on the relationship between the University and the Promotional services. The case study description is the first step of the CR analytical framework and draws on the conducted interviews. The purpose of this chapter is to present the data in a direct form, and to identify the CR objects, events and components with causal powers. These attributes then helped to build the initial CR Mechanism + Context = Outcome explanation.

Chapter 8: Answering the research questions via the abduction and retroduction processes

This chapter critically analyses the data using CR analytical processes. These include contrasting and reframing the collected data in the light of a number of theories (abduction), looking for deeper explanations of the phenomena and recognising the critical characteristics of the relationship between the University and the Promotional services (retroduction). The research questions are answered and the final CR explanation is presented in this chapter.

Chapter 9: Discussion and conclusion

This chapter links back to the literature and theoretical review and discusses the research findings in the light of a wider context of marketing, economic, educational and organisational literature. The re-developed theoretical framework that captures the nature of the relationship between the University and the Promotional services is presented and discussed. Also, a re-developed set of values of marketing for HE is introduced, recommendations for practitioners are discussed and a summary of the key findings and contributions of this research is presented.

2. The University–Promotional services relationship viewed through a marketisation and marketing lens

The literature review adopts economic market theory (Brown, 2010) and the 4P Marketing Mix (McCarthy, 1960) to guide the review of the context of UK HE and to point out some basic theoretical and practical issues relating to HE marketing. These theories were chosen because they helpfully position discussion on the relationship between universities and promotional services within the current context of UK HE.

Generally, the debates on the HE market and the marketing of HE are highly controversial, which will be apparent from the conflicting discussions throughout the review. The review then leads to the specific theoretical framework of this study (chapter 3). The literature review and theoretical review (chapter 2 & chapter 3) identify the theoretical and practical gaps that this research project aims to cover.

2.1 Combining the market and marketing perspectives

Understanding the changing landscape of the UK HE is not an easy task. Processes such as marketisation, marketingisation, privatisation, globalisation and internationalisation characterise some of the changes in the UK HE context. These processes were defined in the introduction. This chapter looks beyond the definitions and deconstructs the underlying mechanisms that connect all these processes – the open market and open competition agenda that is the essence of economic market theory.

Economic market theory, however, appears to be distant from marketing discipline and practice, and the relationship between universities and promotional services. Therefore, in order to relate the debate to marketing, this review combines economic market theory (Brown, 2010) with the basic concept of the 4Ps Marketing Mix (McCarthy, 1960). This connection helps to review the literature strategically and to understand fully the context in which the university and promotional services operate. Economic market theory and the Marketing Mix are also the major theories underpinning the research process. Together with the theories presented in the theoretical framework, these will be used to contrast the research data and develop a discussion on the results of the study. Moreover, the terms ‘market’ and ‘marketing’ are often used by the participants of this study. This review allows for theoretical understanding of these terms, to be later contrasted with participants’ conceptions.

Market and marketing theory and terminology

‘Market’ is a word with many meanings and connotations. It might simply describe the place of buying and selling, while in marketing the term signifies a specific customer group (AMA, 2014). In the discipline of economics, a ‘market’ is ‘a means of social coordination whereby the supply and demand for a good or service are balanced through the price mechanism’ (Brown, 2011, p. 11). Economic market theory, therefore, implies that there is no one besides the buyer and the seller to decide when negotiating the price of a product or a service. Buyers, with specific budgets, decide what and when they want to buy, and suppliers do their best to meet their needs and gain profit. Sellers decide what and how they want to sell, depending only on their abilities, resources and customer demand. If this was the principle in HE, the student/customer could buy any degree as long as they had enough money to pay for it; students would determine the style of teaching and level of academic quality, and the university would do everything to satisfy them and attract well-paying customers. The current situation in UK’s HE does not fully reflect this scenario because HE is not free from government influence. However, movements towards the market culture can be observed. Policy documents (Browne et al., 2010; Dearing, 1997) seem to suggest that marketisation is for the good of HE and society, and that supply and demand mechanisms can function well in the HE context.

To understand whether this trust in economic market logic is justifiable or not, we need to consider how well HE conforms to the definition of the economic market. There are eight basic conditions for an economic market to function. For the provider these are freedom of entry, freedom to specify the product, freedom to use available resources and freedom to determine prices. For the consumer the conditions are freedom to choose a provider, freedom to choose a product, adequate information on prices and quality, and direct and costcovering prices paid (Onderwijsraad, 2001, in Jongbloed, 2003, p. 114). These eight freedoms present an elaborate account of market conditions but may be effectively encapsulated and simplified into four mechanisms: autonomy, competition, price and information (Brown, 2010). These overlap considerably with the basic Marketing Mix (McCarthy, 1960).

Marketing, similar to economic theory, is an established discipline with its own well developed theories and language. However, while some of the terms are similar to economic theories, the definitions are often different. For example, ‘market demand’ in marketing means the volume of product or service bought by customers in a specific area (AMA, 2014). Therefore, for marketing, there is a ‘market’ as long as there are or could be customers who are willing and able to purchase the goods. This is quite different from the economic ‘market’ where the focus is that supply and demand is regulated through the price mechanism and not through government regulation and intervention. Nevertheless, there are also similarities. The ‘Marketing Concept’ (which is only one of a number of marketing ideas) suggests, for example, that the product should be designed by the producer to satisfy customers’ needs (Levy & Luedicke, 2012). This corresponds with the idea from economic market theory that supply and demand are balanced by buyers’ and sellers’ needs and financial resources. The Marketing Mix goes beyond this notion and says that, in addition to the product, the price, place and promotion of that product is also of interest (McCarthy, 1960).

Throughout the history of marketing thought and practice, these four elements have been revisited numerous times. For example services marketing, in order to reflect the needs of the services sector, extended the traditional 4P Marketing Mix to 7P, adding people, physical evidence and process (Zeithaml & Bitner, 2003). Ivy (2008) developed an alternative marketing mix for educational institutions: premiums, prominence, promotion, price, programme, prospectus and people. Premium stands for things that act as an incentive or something that adds special feeling to the course (e.g. accommodation, specific features of a module, computer facilities), prominence stands for academic staff reputation and league tables position, promotion is represented by PR and e-marketing, price consists of aspects such as the level of the tuition fee, payment arrangement or programme duration. Programme includes the range of elective and compulsory modules, prospectus stands for the hard copy of a prospectus and direct mail and finally people stand for a personal contact between the student and the university.

Another model was developed by Bruner (1989). Bruner offered a new marketing mix conceptualisation - the 4Cs – concept, channels, costs and communication. Bruner's model was not developed specifically for HE, however the 4Cs seem to be adequate in describing broad marketing applications, they have pedagogical appeal, they suggest activities most practitioners relate to and are comfortable with and they reflect consumer orientation. For example 'concept' as opposed to 'product' can be "applied generically to all manner of tangible and intangible exchange offerings" (Bruner 1989, p. 73). Bruner's conceptualisation was also meant to be fluid, meaning that the four marketing variables can overlap and other marketing models, such as positioning, differentiation or market research could be built into it. Wasmer, Williams & Stevenson (2008) then applied Bruner's idea to HE. Educational programmes are then considered to be the concepts of HE, which is not only broader but also more acceptable then products (traditionally related to commercial goods).

All reconceptualisations of McCarthy's 4Ps represent interesting developments of the discipline of marketing for HE. The theoretical applicability and better suitability of such concepts to HE is undisputable. Nevertheless, the problem is the applicability and penetration of these models to practice. At the moment it seems that these models occupy a safe position in the academic literature, but they are not taught in marketing courses or used by marketing practitioners (AMA 2014, CIM 2011). As Yudelson (1999) says, McCarthy's core concept is robust and marketing educators and practitioners will continue to use this model well into the foreseeable future. That is why the present research uses the traditional 4Ps Marketing Mix model. Moreover, regardless of which variation of Marketing Mix is used, the problem is still the lack of understanding of the relationship between the marketing discipline and economic market logic and how they influence each other in practice. This chapter therefore aims to bridge this gap by contrasting economic market mechanisms of autonomy, price, competition and information with the traditional Marketing Mix of product, price, place and promotion. Such discussions also provide a good overview of the context in which universities and promotional services operate.

2.1.1 Autonomy – the economic market perspective

For economic market theory to function, buyers and sellers must be independently able to decide what and how they want to sell or buy. Promotional services are often private, corporate providers, therefore they can freely determine the form of their service and ways of delivering it. Universities, however, are not fully free to determine prices, programmes or student numbers (Brown 2010). Universities' autonomy is a complex issue. The European University Association (EUA) defines four strands of institutional autonomy: organisational autonomy, financial autonomy, staffing autonomy and academic autonomy. Organisational autonomy is understood as the freedom to select executives and dismiss heads, capacity to decide on academic structures and capacity to create legal entities. Financial autonomy is understood as the length and type of public funding, the ability to keep a surplus, the ability to borrow money and the ability to charge tuition fees. Staffing autonomy concerns the capacity to decide on recruitment and dismissal procedures, salaries and promotions. Finally, academic autonomy looks at the capacity to decide on the overall number of students, to select students, to introduce and terminate programmes, to choose the language of instruction and the design content of degree programmes, and to select quality assurance mechanisms (Estermann, Nokkala, & Steinel, 2011). At the beginning of the EUA report 'University Autonomy in Europe II; the Scorecard', the authors make clear that autonomy is a desirable state for European HE and that governments should strive to move in this direction. However, the report also states that 'autonomy does not mean absence of regulations' and that Europe promotes 'autonomy with accountability' (Estermann, Nokkala et al. 2011, p. 6). The report does not specify what it means to have regulations within autonomy, or for what the autonomous universities should be accountable. The EU itself produces a number of regulations relating to universities (e.g. EU public spending regulations or the Bologna Agreement), therefore it seems as if the EU promotes a level of autonomy from national governments but expects universities to comply with their own regulations. In fact, all governments within the EU and the European Union itself influence and subsidise HE (Brown, 2010; Estermann et al., 2011; Kirp, 2004).

Governments regulate HE institutions because HE is still (at least partially) considered to be a public good, representing a significant contribution to the economy and supporting the future success of the country. The public nature of HE is an important feature that complicates education's compatibility with economic market logic. Economic market logic is concerned with private gain and argues that students are building their own educational capital that will enable them to earn higher salaries in the future, therefore HE institutions should be funded directly by students. However, HE does not bring only personal benefits but public good (e.g. increased workforce flexibility, reduced crime rates, increased charitable giving, increased quality of civic life, appreciation of diversity) (Bloom, Hartley, & Rosovsky, 2006, p. 300). Unregulated and fully autonomous HE might therefore cause numerous societal problems such as, for example, an undersupply to certain professions. On the other hand a highly regulated HE system might suffer from inflexibility, stagnation and restricted academic freedom.

Even though the EU autonomy scorecards are a one-sided representation of how 'autonomy with accountability' is what we should all strive for, the scorecards produced by the EUA still serve as a broad overview of the level of each country's autonomy. UK scores high on the European autonomy ladder: first in organisational autonomy, third in financial, second in staffing, third in academic (EUA, 2013). 'UK HE institutions can employ and dismiss staff, set salaries, decide on academic structure and course content, spend budgets to achieve their objectives, and own and dispose of their buildings and equipment' (Locke & Bennion, 2009). UK public HE institutions can also keep a surplus without restrictions and decide on their admission procedures (Estermann et al., 2011). The government partially restricts undergraduate student enrolment numbers to public universities, and this is going to change in 2015/2016 when English universities will for the first time be able to recruit as many students as they want (Treasury, 2013). The government also determines the cap on UK and EU undergraduate tuition fees and the conditions that institutions must meet to become universities and to have degree awarding power. It also imposes quality measures on HEIs, influences the widening participation agenda and funds research on the basis of a Research Excellence Framework. Intermediary bodies such as the Quality Assurance Agency, the Office of the Independent Adjudicator the Office for Fair Access, the Funding Councils and the Research Councils as well as the relevant government departments help the government to influence these matters (Locke, 2010).

Therefore, even though the UK has one of the most autonomous HE systems in Europe, the system is not fully autonomous in the sense of economic market theory. In marketing, autonomy can be related to the ability of the business to design its own product. In the case of HE institutions, study programmes are considered to be universities' main products (Maringe & Gibbs, 2009).

2.1.2 Product – the marketing perspective on autonomy

Promotional services providers are free to design their services to meet clients' needs. Universities, on the other hand, face various constraints. Even though UK public universities my start and close programmes freely (Estermann et al., 2011), they subscribe to a national quality assurance process that oversees the quality of the programmes. The government also has specific controls for programmes such as Education (e.g. the Ofsted controls). The EU also has a set of quality assurance guidelines overseen by the European Association for Quality Assurance in Higher Education (Achilles, 2014). Therefore, even though UK universities are free to start programmes without prior accreditation, they are dependent on governmental procedures for the programme to function in the system.

Also, it seems that universities have not fully embraced the concept of product as understood in the marketing discipline. There is a resistance to using the terminology of 'product' or 'service', whether the product is considered to be the programme, the qualifications or the graduates. Universities have good reasons for such resistance. A 'product' is a bundle of attributes that exists for the 'purpose of exchange in the satisfaction of individual and organizational objectives' (AMA, 2014). The problem is that developing a deep and critical understanding is not always what satisfies either students or the job market. Another issue is referring to students as raw material and graduates as products (Burrello, Lashley, & Beatty, 2001; Clayson & Haley, 2005). This terminology transfers universities into a machinery that manufactures ready-made products/graduates to deliver to their customers/job market. The price of the potential product or service is another highly controversial issue.

2.1.3 Price – the economic market perspective

In a functional market, price as well as other market mechanisms needs to be dependent only on buyer and seller. This is the case for promotional services, where the price of the service is negotiated between the provider and the client university. When the price exceeds a certain level, however, universities have to follow UK and EU regulations on public spending and run a tender process to choose the provider (Achilles, 2014; Out-Law, 2014). Universities also subscribe to government policies on the price of HE. In the UK significant changes in tuition fees systems were introduced during the past two decades. In 2010 the United Kingdom spent 1.4 per cent of GDP on tertiary education, of which 0.7 per cent was public and 0.6 per cent private. In comparison, US expenditure was 2.8 per cent of GDP on tertiary education, of which 1.0 per cent was public and 1.8 per cent private (OECD, 2013). The 2012 and 2013 changes to HE policy in the UK are not reflected in these figures; however, since 1989, public funding of HE has decreased and private funding has increased (Watson & Bowden, 2007).

The government influences tuition fees levels by putting a cap on undergraduate tuition fees. In 1998 in England the cap was set at £1000. In 2006 this was increased to £3000 and in 2012 to £9000 (Fees, 2012). There is no cap on fees for postgraduate students and international students, therefore we can see that the prices vary from £3400 (UK, EU), through £10,000 (international) to £41,000 (UK, EU & international) (CUG, 2013).

The government usually claims that these policies are introduced in order to save public budgets, to promote competition between universities and to let students decide where they want to invest their own or borrowed money. Government tuition fees, loans and maintenance loans are available to undergraduate and, from 2013, to postgraduate students. These loans have low interest rates and their repayment starts only after students earn over £21,000 a year (GOV.UK, 2013). Curiously, private HE institutions may also access government loans yet without being limited in terms of student numbers, national quality assurance or the independent student appeal process. This has resulted in private HE institution recruiting increasing numbers of students. The problem is that the number of students who are unable to repay the loan is also increasing. The government estimated that 34 per cent of the loans will not be repaid. The Higher Education Policy Institute, however, believes that the number of loans not to be repaid could be much higher, therefore it is not clear whether the new policies on tuition fees will help the government to achieve savings or not (Thompson & Bekhradnia, 2012). The government's budget will become even more straitened after 2016 when the cap on student numbers is lifted. Possible but not perfect solutions to this financial pressure would be a further reduction of funding for strategic areas such as widening participation, 'making graduates pay more by changing the conditions on which loans are provided' (Brown, 2013a, p. 3) or privatisation of part of the public loan book, which would move HE another step towards the economic market model (IPPR, 2013). At the moment, however, most of the tuition fees and maintenance loans are governmental. It can therefore be observed that, even though the government moves towards the economic market logic on price, public funding is still at stake. And because of the level of unpaid tuition and maintenance loans, the exercise of cutting public expenditure is questionable.

2.1.4 Price – the marketing perspective

Whether decreased public funding increases market competition on price is also disputable, because price is used not only for economic but marketing purposes. From the marketing perspective, price can be used to manipulate demand. There is no literature on how promotional services providers use price to achieve their marketing goals. However, there is ongoing discussion concerning universities and whether students/consumers perceive price as an indicator of quality (Ford, 1982). Universities may use tuition fees not only to supplement public funding but to achieve other strategic goals. For example, consumers often perceive price to be an indicator of prestige (Brucks, Zeithaml, & Naylor, 2000). One reason why the English government's recent attempt to introduce price competition for undergraduate degrees did not work is that most universities set their price to £9000 to avoid appearing low-cost and being perceived as a lower level university. Another way UK universities manipulate demand is by reducing the length of time required for study. For example, a typical UK master's programme lasts one year in contrast to most European countries where a master's programme lasts two years. By decreasing the time of study, universities attract students who want their postgraduate degree faster, which in turn allows them to enter the job market earlier. Also, discounts are used to motivate students to buy study programmes. Universities, for example, offer a 10 per cent discount on postgraduate courses for their own graduates and alumni (Southampton, 2013a).

Price influences not only the buying behaviour but the expectations of customers. Students paying higher fees may expect the university to meet their needs to a higher standard, from both an academic and a service perspective (Molesworth, Scullion, & Nixon, 2011). The growing number of complaints appears to reflect this trend. The Office of the Independent Adjudicator reported a 25 per cent increase in complaints from 2011 to 2012 (OIA, 2013).

There are also lively discussions and opinions on the effect of increased tuition fees on overall student numbers (Dyke et al., 2011; Wilkins, Sham, & Huisman, 2013). Such discussions must be considered within the complex context of the UK. For example, the undergraduate tuition fee of £9000 was only introduced in England; Scottish students attending Scottish universities do not pay fees. Different conditions also apply to Welsh and Northern Irish universities. While there was a decline of 6.9 per cent in UK-domiciled applicants between 2010 and 2013, Scotland registered a 0.7 per cent increase and Northern Ireland a 5.4 per cent increase. Furthermore, differences in the demographic makeup of the student population need to be considered. For example, in England 15.4 per cent fewer students aged over 25 applied to a university in 2013 than in 2010, but 'only' 4 per cent fewer younger students (up to the age of 19) (ICOF, 2013). Obviously, a variety of factors are at play here: the decreasing population of young people; an increasing number of places at private universities; the quality of (mis)communication by the government and universities about the student loan scheme; and perhaps increasing investment into marketing communications by HE institutions all influence student numbers.

2.1.5 Competition – the economic market perspective

The ability of English HE institutions to charge high fees is dependent on a number of factors such as the government's flexible visa conditions, and universities' quality, reputation and national and international competitiveness. Universities compete for students and promotional services compete for universities. Competition is a basic factor if economic markets are to function. If there is only one or a couple of providers to deliver a certain service or product, there is no challenge to the price. If HE follows the market logic on competition, there would be a great variety of institutions offering a variety of programmes at variable prices. This might be the case for promotional services providers, because there are many varied promotional service providers. In the case of universities, there are more than 600 private HE providers in the UK (BIS, 2013), however only three of them were governmentally approved as universities with full degree awarding power. Public universities, therefore, largely compete with each other.

The number of public universities in the UK has grown exponentially. UK universities range from to the old, research-oriented Russell Group universities to the former polytechnic institute post-1992 universities and the newest 2004 universities (mainly teaching universities, often with no power to award research degrees) (Locke, 2010). Post-1992 and 2004 universities focus mainly on teaching, however they increasingly compete with traditional research universities by developing their own research programmes (Ashwin, 2006). This expansion, together with the elevating cap on student numbers, meant that the number of students in the UK quadrupled between 1970 and 2012 (HESA, 2013b). This trend is expected to continue because of the next lift of the cap on student numbers (IPPR, 2013). There are numerous explanations of the expansion. One says that the change was brought about by global economic challenges in the 1970s and 1980s, rising world oil prices and the decline of traditional industries. The economic problem was partially attributed to the failure of the education system to generate an educated society with knowledge and skills to enable economic success (Foskett, 2011). More HE institutions were therefore needed to be established to prevent such crises in the future, yet, as may be observed from the current economic situation, the increased number of HE institutions has not saved the economy. Another explanation of the expansion of HE provision lies in the belief in market mechanisms such as competition, believed to stimulate improvements in quality, raise standards of achievement, stimulate choice and drive down costs (Foskett, 2011). These idealised goals could perhaps be achieved if HE was not considered a public good and if the HE environment operated in a true economic market.

The UK competes for students not only at a national but a global level. The numbers of international students studying in the UK are increasing every year.

In 2011/2012 435,235 non-UK students studied in UK HE, 1.6 per cent more than in 2010/2011 (HESA, 2013a). Worldwide, over past decades the number of international students has risen from 0.8 million in 1975 to 4.3 million in 2011 (OECD, 2013). The US is a host country to more than a quarter of the world's foreign students (Altbach, 2004). UK, Australia and Canada are also leading host countries for international students (Altbach, 2004; Binsardi & Ekwulugo, 2003; Mazzarol & Hosie, 1996).

It may therefore be observed that competition between HE institutions is increasing and, for countries importing foreign students, international higher education is big business (Altbach, 2004). This, however, does not comply with economic market theory because governments are heavily engaged in manipulating and financially supporting international competition.

2.1.6 Place – the marketing perspective on competition

One aspect of the support provided by governments is the generous funding of international marketing campaigns (Binsardi & Ekwulugo, 2003). It is widely believed that in a highly competitive HE market 'universities have to justify their existence and stand out from the crowd' (Maringe & Gibbs, 2009, p. 59). Marketing tools such as segmentation, targeting, positioning and branding are often used by universities to help to attract attention and to communicate information. 'Segmentation is the process of identifying groups of customers who are relatively homogenous in their response to marketing stimuli' (Brennan, Baines, & Garneau, 2003, p. 107) so, for example, undergraduate students may be segmented into home students, international students and mature students. Each has different motivations, expectations and often quite different cultures (Maringe & Gibbs, 2009). Market segmentation research helps universities to understand and identify these segments and so develop and target their messages and offers to a specific audience. Targeting is then 'the process of selecting one or more segments in which to compete' (Brennan, Baines, & Garneau, 2003, p.111). The university then attempts to position itself in relation to the target segment. 'Positioning is the identification of a particular appeal that the firm can make to customers in each target segment' (Brennan, Baines, & Garneau, 2003, p.111). Some of the key positioning factors for universities are whether the university is teaching- or research-led, or whether the university has a strong science or arts focus (Chapleo, 2004). Such brand positioning (branding) can also focus on the universities' learning environment (including excellent staff, facilities and research resources) or reputation (Gray, Fam, & Llanes, 2003). Promotional service providers such as advertising, PR and design agencies and so on often help universities with strategic marketing campaigns.

Hirsch (1977) argues that HE is a positional good and some HE institutions in the eyes of students, parents and employers offer better social status than others. UK HE is well known for its 'Oxbridge' brand (Maringe & Gibbs, 2009). The universities of Oxford and Cambridge are at the top of the world university league tables and are considered prestigious institutions that not only give students the best education but provide a competitive advantage in the job market over graduates from other universities. However, as will be discussed in the following section, current measures of HE institution ranking should not be used uncritically.

Marketing strategies are used both nationally and internationally. International markets are increasingly seen as important and many universities differentiate between their international and marketing departments, so each has a different strategy. Nevertheless, both the international marketing strategies and the internationalisation strategies of HE institutions influence students' decision making (Chen, 2008). Examples of such strategies are the embedding of international elements into the curriculum, establishing student and staff exchange programmes and joint degree programmes, initiating collaborative international research, borderless/cross-border HE (e-learning, m-learning) and setting up offices and 'hot desks' in overseas centres (Maringe & Gibbs, 2009). More recently UK universities have begun to establish overseas campuses. This level of international penetration requires universities to gain market access. Kotler (1986) suggests that organisations draw on two marketing tools to enter new markets. The marketing concept of power focuses on strategies that help the university influence international governments, legislators and bureaucrats so that they can enter and operate in a target market. For example. the University of Southampton opened a campus in Malaysia in 2012. The University had to establish a relationship with the Ministry of Higher Education in Malaysia before it was invited to establish a branch campus for engineering (Southampton, 2013b). However, this alone was not enough to cultivate positive public opinion; universities also use public relations strategies. They generally use their own internal public relations departments, however they are increasingly using external agencies to provide specific knowledge of particular countries and cultures. Public relations is an inseparable part of an organisation's communication strategy and represents a skilful way of dealing with information.

2.1.7 Information – the economic market perspective

Information plays a crucial role in economic market theory. The theory argues that consumers make rational choices based on quality information. In this research this would imply that students choose their programme after carefully considering their possibilities and weighing information about price, quality and availability (Brown 2010), and that universities choose promotional services providers after assessing a number of different options, carefully considering how the effectiveness of the services is to be measured. However, decision making is far more complex than this suggests and a number of other significant factors are at play. For students, these range from personal reasons such as a student's partner studying in the same university or proximity to the university, to external reasons such as the influence of a future employer, the availability of future employment, immigration procedures and accessibility. For universities these might be preferences for certain agencies, for example, or a lack of experience in using promotional services. Quality is often judged on the basis of a recommendation from a friend, family, teachers or agents; alternatively, various university ranking systems are used to determine the potential quality of an institution or programme (Binsardi & Ekwulugo, 2003; Leach & Zepke, 2005; Maringe, 2006). There are more than ten main global rankings, more than sixty national rankings and a number of regional and professional rankings (Hazelkorn, 2013). Well-known rankings are the Shanghai Jiao Tong Academic Ranking of World Universities, the Times Higher Education Supplement, the World University Rankings, the QS World University Rankings or the World's Best Colleges and Universities. Students often look at the rankings, but do not examine how they were derived. For example, they often equate quality with quantity (e.g. the number of research papers). Rankings measure internationalisation numbers, the faculty/student ratio and so on, but rarely directly measure the quality of teaching or student experience (Hazelkorn, 2013; Taylor & Braddock, 2007).

Brown (2013b) criticises the UK government's blind belief in the decision-making processes of students in adopting a number of instruments to assist the student in this 'informed' choice. These are the Institutional Performance Indicators, a National Student Survey, Unistats and the Key Information Sets. Related to this, a popular US blog 'Rate my Professor' was recently launched in the UK. On this blog, students can comment on the helpfulness, clarity and 'easiness' of their professors or assign a red chilli pepper for their attractiveness (RateMyProfessor, 2013). Brown (2013b, p. 16) not only doubts the ability of a young person to make a rational choice but wonders if it is 'fair to load upon students, at the age of 17 or 18, the main responsibility for making a choice of subject, course and institution…'.

It must also be remembered that it is not only the government that tries to inform students but universities. Students, for example, consider traditional university promotional material such as the brochure and website to be reliable sources of information (Dyke et al., 2011). There is therefore a large information asymmetry between the university and the student, where universities hold tremendous power to influence a potential student. In an ideal world, universities would strive to 'tell the true story' about their institution and programmes.

2.1.8 Promotion – the marketing perspective on information

In a more market-driven environment universities often use promotional techniques to 'sell' their services. Promotion means that information about the product or service is disseminated to customers. A 'promotional mix' consists of advertising, sales promotion, public relations, direct marketing, personal selling and sponsorship (Rowley, 1998). These tools can be used both to 'tell and sell' the service. HE uses the elements of the promotional mix widely. The use of media such as radio, press, billboards and the internet are examples of advertising; discounts on fees are sales promotions; University social events, newsletters or outreach activities are public relations; conferences or the use of agents are examples of personal selling; direct mail sent to students' email addresses is an example of direct marketing; and funding university sport teams is sponsorship. The most popular marketing communication tools used by universities are the familiar ones such as leaflets, brochures, open days, and websites (Jansen & Brenn-White, 2011). However, in order to attract a wider variety of students, universities are increasingly using an even wider array of communication channels. Universities are combining traditional solutions such as websites and billboards with creative approaches such as computer games and competitions (UTB, 2010). Promotional services often assist universities with advertising, PR, direct marketing and personal selling.

With increasing tuition fees and competition, universities invest more in promotion. When fees increased from £3000 to £9000, UK universities increased their marketing budgets by 22 per cent (Matthews, 2013). Critics (Gibbs & Murphy, 2009; Klassen, 2001), however, argue that promotion is inappropriate for education because education is a public good, and promotion most of the time uses a one-sided sales pitch to 'sell' the educational product rather than to 'tell' the real story. It is also argued that the intrinsic values of education (e.g. acquiring an independent and deep knowledge) differ from the intrinsic values of the market (e.g. satisfying the wants and needs of whoever has the money to buy the goods) (McMurtry, 1991). However, marketing can be used ethically (Gibbs & Murphy, 2009) to deliver balanced and unbiased information to students although, unfortunately, this would still not guarantee rational decision making by all students/customers. More than logic, serendipity and emotions often have a far more powerful part in decision making.

2.2 Literature review's link to the theoretical framework

The literature review demonstrated that, even though HE does not completely fulfil any of the conditions of economic market theory, there is a tendency for the HE sector to move towards this model and there is a clear relationship between the market and universities' marketing activities. For example, the relationship between the economic market's price mechanism and the ways in which marketing uses price demonstrates that it is not only the government that influences HEIs, but the HEIs themselves that, by adopting certain marketing strategies, in turn influence the government. For instance, the government expected universities to adopt variable prices when the £9000 cap on undergraduate tuition fees was introduced. However, they used price as a marketing tool and most universities in England increased their tuition fees to £9000 because consumers perceived price as an indicator of prestige. It is possible that such strategies will influence HE policies in the future.

Another example of the interconnectedness of the market and marketing revolves around the discussion on autonomy. Autonomy is a broad concept that, in economic market terms, covers universities' independence in setting and developing programmes, prices, student numbers, admissions and staffing. In this chapter the marketing concept of product is compared with the economic market idea of autonomy. It is observed that, even though the UK HE is highly autonomous, governments still influence HE institutions and universities are not always free to develop programmes to meet students' needs. It could be argued that one of the reasons why the government needs to regulate HE is that HE is considered to be a public good. An unregulated and fully autonomous HE could potentially trigger various societal problems.

Information is then an important economic market mechanism and an important tool for marketing promotion. The UK government supports a number of activities to provide information to students and to support students' 'rational' decision making. Equally, universities increasingly use promotional campaigns to both 'tell' the students about the university and 'sell' the programme. Also, more than ever before, universities use managerial techniques such as outsourcing (Kirp, 2002). 'There is a heavy emphasis on importing ideas and practices from the private world of business into the world of public service, on the assumption that the latter are superior to the former' (Deem & Brehony, 2005, p. 220). Contracting promotional services providers is an example of such a phenomenon.

The literature review positioned the phenomenon of universities using promotional services within context of the marketisation of HE and the increased use of marketing for HE. There is, however, limited literature on how universities and promotional services interact and work together in the marketising of the HE environment. This research aims to cover this gap by investigating in depth the relationship between a specific university and promotional services. Economic market theory and the Marketing Mix model are helpful to deconstruct the relationship. However, in order to understand fully the interaction between universities and promotional services, a theory of organisational relationship is needed. The following chapter looks at possible theories and chooses a specific theory of organisational interaction as a basic framework for the study.

3. Framing the research within a theory of organisational relationships and the theory of education and market values

This research combines economic and marketing disciplines with the discipline of education. These have different understandings of what is a theory. Education considers conceptual descriptions to be legitimate theories, whereas marketing favours those that apply an ordering framework and may be tested via hypotheses in a traditional, positivistic way of understanding theory (Danermark et al., 1997).

In general, theories may be divided into meta-theory, normative theory or descriptive theory. Meta-theories are about fundamental assumptions and preconditions of science (e.g. research philosophies). Normative theories examine and support ideas of how something ought to be, and descriptive theories interpret and explain different social phenomena (Morrow & Brown, 1994). Descriptive theories might concern conceptual descriptions (Sayer, 1992).

This research takes a broad position and considers all types of theories to be relevant. However, conceptually descriptive and normative theories are mainly used, because the aim of the research is to understand the characteristics of the interaction between a University and Promotional services. The literature review has already identified two theories (economic market mechanisms and the Marketing Mix) that could help our understanding of the relationship between universities and promotional services. A specific theory, however, is needed to frame the interaction between the University and Promotional services. This chapter reviews a number of theories of business relationship and interaction in order to find a theory to help to identify important attributes of business relationships. After careful consideration, the IMP Interaction theory (Hakansson, 1982) was chosen to guide the study, because it makes the interaction between the two parties the focus of its attention. The theory also helpfully considers the role of the environment in the interaction and the role of a number of variables that influence the interaction (e.g. aims and attitudes of the organisation and the individuals). The IMP theory says that in order for the business interaction to function problem-free, the aims and attitudes of interacting parties should be aligned. In marketing for HE, values and attitudes constitute a sensitive issue. McMurtry (1991), for example, says that in fact education and market have opposing values, aims and attitudes. For this reason the theory of education and market values need to be incorporated into the theoretical framework that, together with IMP theory, builds a strong basis for understanding and deconstructing the research problem.

3.1 Theories of relationship between businesses

To understand the relationship between the University and Promotional services, theories of business relationships need to be considered. Even though the importance of mutual interaction between buyer and seller (the dyad) was recognised already by 1966, the concept was not substantially developed until the early 1980s (Wren & Simpson, 1996). Earlier studies paid attention to one side of the dyad only, and studied Organisational Buying Behaviour (OBB). Three well-known OBB models were developed by Robinson, Faris and Wind (1967), Seth (1973) and Webster and Wind (1972). Later, Johnston and Lewin (1996) blended these models into a single comprehensive model and added the dimension of a business relationship.

The Buy Grid Model developed by Robinson, Faris, and Wind (1967) looks at phases of buying decision (problem recognition, general need description, product specification, suppliers' search, proposal solicitation, supplier selection, order-routine specification, performance review) and distinguishes between buying cases (new task, modified re-buy, straight re-buy). This model offers a useful framework for understanding the differences between new and repeated buy, but does not look at any environmental influences on the buying decision.

The model created by Seth (1973) – an Integrative Model of Industrial Buyer Behaviour – looks at information sources, individual buyer characteristics, expectations, product and company specific factors, situational factors (for example environmental factors) and the conflict resolution procedures. This model is useful for understanding the role of the information sources in organisational decision making (e.g. marketing communications) and the influence of individuals (their character, abilities, attitudes) on buying decision. It does not, however, help with conceptualising business relationships.

The third model was developed by Webster and Wind (1972). This recognises four main influences on the buying decision process: 1. the environment, 2. the organisation, 3. the buying centre, and 4. the individual. The model describes the structure of these factors in detail. This model is comprehensive, but it is too linear, leading from the environment factors to individual factors without any chance for bi-directionality.

Johnston and Lewin (1996) blended the three original models into one integrative framework. Their model incorporates nine constructs found in the three original models (environmental, organisational, group, participant, purchase, seller, conflict/negotiation, informational and process or stages). They also added four new constructs: at the internal level, role stress and decision rules; and at the external level, buyer–seller relationships and communication networks. This framework therefore combines the older models with new concepts compatible with the development of the science and important to understanding the OBB. However, it is difficult to follow this framework, because the model comprises two parts. The first part deals with traditional OBB concepts and the second acknowledges the role of the interaction between organisations. This representation is, therefore, scattered and does not put the interaction at the centre of the theoretical interest.

Theories that focus on the interaction and relationship between the buyer and seller attracted increased attention in the 1980s when researchers realised that firms often preferred to maintain stable and durable cooperation with their suppliers in order to reduce risk, to prevent switching costs and to maintain source loyalty instead of brutally exercising their purchasing power in the market (Cunningham & Homse, 1986; Hakasson & Wootz, 1979; Turnbull, Ford, & Cunningham, 1996). After that, several interaction and relationship models were developed (Campbell, 1985; Dwyer, Schurr, & Oh, 1987; Gummesson, 1978; Weitz, 1981). Gummesson (1978), for example, identifies five stages of relationship: pre-stage, decision process, decision to select a particular professional firm, operation of the assignment and post-stage. The aim of this model was to aid the decision process that leads to the selection of a professional seller. Weitz’s (1981) model considers the salesperson's resources, the customer's buying task, and the customer-salesperson relationship. The model incorporates a substantial number of variables, for example the way that the macro and micro environment influences the salesperson or how salesperson resources (e.g. age, intelligence, education) influence the relationship. Even though this model recognises the importance of the interaction between buyer and seller, its primary focus is on understanding personal selling effectiveness (Weitz, 1981).

Campbell's model, on the other hand, concentrates on interaction strategies and develops guidelines for marketing and purchasing managers (Campbell, 1985). The model considers important interaction factors such as information exchange, conflict resolution, adaptation, commitment or trust. These factors are not, however, discussed in depth (Wren & Simpson, 1996).

The importance of Dwyer's model lies in a framework for developing buyer–seller relationships and the importance of factors such as communication and bargaining, power and justice, expectations and shared values (Dwyer et al., 1987).

Each of these models is useful for understanding business interactions, however none captures the interaction process in any complex way. All current relationship marketing models aim at specific action: Gummerson's model aids the decision process that leads to the selection of a professional seller, Weitz's model focuses mainly on salesperson resources, Campbell's model on developing guidelines for purchasing and marketing managers, and Dwyer's model on the importance of a number of factors in the interaction and relationship, but not with the influence of the wider environment on the exchange situations.

These models are part of organisational studies relating to the relationship marketing approach. A substantial number of other researchers have investigated the management of relationship between buyer and seller (e.g. Frazier, 1983; Frazier, Spekman, & O'Neal, 1988; Wilson & Mummaleneni, 1986). These studies usually aim at understanding the development of the relationship in order to help marketing and purchasing managers influence their activities.

In Europe, however, a group originated that adopted a grounded approach to investigate business relationships as they are, not as they should be (Mattsson, 1997). This IMP group developed a comprehensive dynamic model of buyer–supplier relationships known as the Interaction model. Its strength is in its complex design that represents not only the individual buyer and seller entities, their characteristics and the characteristics of the interaction and its atmosphere, but the wider macro environment of the interaction (Hakansson, 1982). The suitability of this model for the research also lies in the fact that the model was developed on the basis of qualitative data and used in a number of qualitative studies. The model was previously used to investigate the development of agency–client relationship (Halien, 1997). Another argument for using this approach lies in later development of IMP group thinking relating to the understanding that businesses do not interact in a vacuum. Buyer and seller are usually dependent on a number of other entities. This is also true for universities and promotional services; universities use a number of promotional services, and promotional services often work with more than one university.

For the above-mentioned reasons, the IMP Interaction model was chosen as an overarching theoretical framework for the study. The model and its applicability for the research is explored in the following section.

3.2 The IMP Interaction model and its applicability to the research problem

The IMP group based its Interaction model on inter-organisational theory and the new institutionalist theory. Inter-organisational theory is related to some of the relationships mentioned earlier with marketing organisation-based studies. In such studies, the organisation is dependent on the environment and, in order to obtain resources, develops relationships with a number of other organisations. Other organisational studies say that organisations are part of a larger social system and to understand how an organisation functions it is necessary to discover its relations with the larger system. The new institutionalist theories are characterised by their interest in the sociology of institutions. They also recognise and study how the broader environment influences the organisation (Hakansson, 1982).

The Interaction model of the IMP group stresses the relationship between the buyer and seller and says that both influence the buying situation, therefore decision making should not be analysed from a single perspective (Hakansson, 1982). This logic is useful for the research, because the decision to use the promotional service may be strongly influenced by its communication strategies and marketing management. The original IMP Interaction model looks at the supplier-buyer interaction at four levels – the supplier-buyer level, the interaction level, the atmosphere of the interaction and the environment of the interaction.

Since the Interaction model was first introduced, it has been re-developed numerous times. Halien (1997), for example, applied the model of agency-client relationships and expanded it with new descriptions and concepts such as the interaction style and the percieved outcome of the interaction process. Halien's work helps us to gain better insight into the specifics of agency-client relationship. However, the model developed by Halien is rather labyrinthine. Only the elements identifed by the author as important elements in the agency-client relationship were therefore implemented in the theoretical framework of the study.

This study uses the IMP Interaction model developed by Turnbull and Valla (1986). Part of the IMP group, they specified the aspects of the four basic levels of the model. This model (Figure 1) was chosen because of its clear design and strong explanatory power regarding the interaction processes. The aspects of the Turnbull's & Valla's model are discussed below. The description is combined with insights from Halien's specific framework for the agency-client relationship.

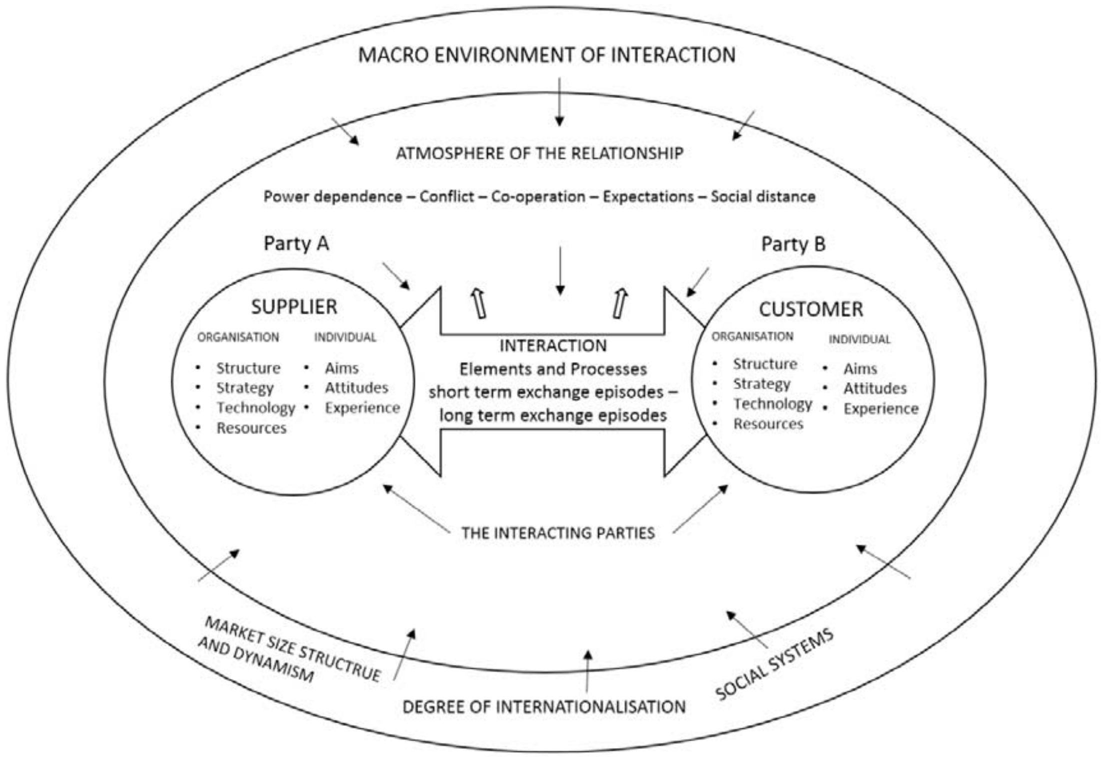

Figure 1. The Interaction model (Turnbull & Valla, 1986, p. 5)

Interaction process

The interaction process includes short-term exchange processes (what is being exchanged), known as exchange episodes. They might be: a) a product or service, b) an information exchange, c) a financial exchange, or d) social exchange. The interaction processes also represent long-term or short-term relationships between parties. Institutionalisation is one of the long-term processes. When a relationship becomes institutionalised, both parties already have clear expectations and responsibilities for the relationship. The other long-term process is adaptation. Adaptation happens when one or other party makes adaptations to the elements of exchange or exchange process in favour of the relationship. For example, in the case of this research, a university might make changes to the way it books the advertisement with the agency, and the agency might make changes to their team structure to best meet the university’s needs. Different variations of the interaction can occur: complex episodes (developing a substantial advertising campaign) within limited relationships, simple interaction episodes (e.g. placing one-off advertisement) within extensive relationship or complex episodes within extensive relationships (Hakansson, 1982). Halien (1997) adds interaction styles to the model. These are characterised by the openness of communication (openness concerning assignment processes such as discussion of goals, strategies and plans, and openness concerning the relationship such as feedback about the relationship or discussion about roles and positions), formality of control (e.g. existence of a written explicit contract or giving strictly defined briefs) and investment initiatives (e.g. making suggestions for client's marketing, motivating the team to make proposals for new assignments). Halien (1997) believes that openness of communication and investment initiatives is particularly important to agency-client interaction.

Interaction parties

The interaction parties are the buyer and seller (the university and the promotional services). The parties are built from various elements – technology, organisational size, structure and strategy, organisational experience and individuals. The Interaction approach holds that the characteristics of the parties are the key to understanding the relationship between them. For example, mutual knowledge and mutual fit is important; differences between interaction parties make the interaction and relationship more difficult (Hakasson, 1982). The IMP approach talks about technological differences, social differences, cultural differences, time and geographical distances (Ford, 1982). In the case of the relationship between universities and promotional services, social differences might be the most important interaction element. These relate to the lack of knowledge between buyer and seller, for example knowledge of each other's marketing and purchasing strategies such as the organisation's and individual's approach to society, to competition or businesses; the organisation's product strategy; the organisations' and individuals' values; internal and external communication style, and so on. The Interaction theory comments on the differences of values, attitudes and knowledge in relation to social and cultural difference between certain countries, however the theory does not examine the problem of differences in values in depth or in anything than an international context. As will be discussed later, this variable is essential in understanding the relationship between universities and promotional services in the context of the HE market (national and international). The reason for this is the theoretical conflict between the values of education and the values of the market. The differences and similarities between the strategies and values of the university and the promotional service play an important role in achieving a deeper understanding and analysis of the case.

Atmosphere

The atmosphere of the interaction is dependent on the interaction environment as well as the interaction parties and processes. The atmosphere of the relationship is characterised by power dependence, conflict or cooperation, overall closeness or distance of the relationship, and companies' mutual expectations and trustworthiness. A change in even one variable (e.g. change of the contact person of one of the interacting parties) may provoke a change in the atmosphere of the relationship. In a positive direction atmosphere develops only slowly and gradually; the negative direction, on the other hand, sets in much faster (Hakansson, 1982). Halien (1997) points out that the perceived outcome of the business relationship is essential in understanding the agency-client relationship. This includes the perceived outcomes of the assignment process and the business relationship. Halien (1997) also distinguishes between service outcome (meeting the brief's requirements) and ultimate service outcome (achieving sales targets).

Interaction environment

The interaction environment consists of the market structure, dynamism, internationalisation, position in the manufacturing channel and the social system. It includes the concentration of buyers and sellers, the stability of the market, national or international market. Dynamism stands for the closeness of relationship and dependence on a small number of relationships. Internationalisation then affects companies' organisation (special knowledge, resources, etc). Position in the manufacturing channel refers to the presence of several market influences at different stages, and the social system is the wider environment surrounding a particular relationship (e.g. international cultural differences, regulations, exchange rates) (Hakansson, 1982). Halien (1997) points out the importance of critical events in the environment. Such critical events (e.g. sudden changes in legislation) may represent a turning point in the relationship.

The IMP Interaction model, however, does not deal with the environment in the sense of companies' interdependency on more than one supplier and the complex networks that significantly impact on the relationship. IMP researchers developed a new model to deal with this issue, the ARA model (Axelsson, 2010). The main components of this model are Activities, Resources and Actors. Actors are the organisations within the network that carry out activities (such as communication and distribution). In order to do so they need certain resources (e.g. knowledge, finance, energy) (Axelsson, 2009). The ARA model is therefore helpful to study the interconnectedness of organisations. Even though this research deals with three organisations, the Interaction model is more suitable than the ARA model. The main reason is the relative simplicity of the ARA model, which allows understanding of a number of actors in a network but not deeper understanding of a specific relationships. The other reason is that, even though the ARA model deals with one of the problems of the Interaction model (the complexity of the interaction environment), the main issue relating to the environment in this research lies in the very specific context of the university-promotional services relationship. The characteristics of the HE context have been discussed in the literature review, where economic market theory and the Marketing Mix was used to review the HE context. From the discussion it follows that there is a discrepancy between the theoretical conception of the economic market and the current state of HE. The process of marketisation of HE was welcomed by some (Browne et al., 2010; Dearing, 1997) and judged by others (Brown, 2010; Molesworth et al., 2011). This conflictive environment influences the relationship between universities and promotional services. The core of the conflict lies in the essential theoretical differences between the economic market and the education discipline.

The interaction theory holds that 'differences in ethical and moral values between individuals involved in prospective relationship may either prevent effective interaction, or else impose a severe deterrent to its development' (Cunningham, 1982, p. 365). Therefore, in order to understand deeply the relationship between universities and promotional services, the Interaction model needs to be interlinked with the economic market and education discipline. This is achieved by incorporating the theory of economic market values and education values into the theoretical framework.

3.3 Incorporating the theory of educational and market values into the IMP Interaction model

The IMP Interaction model considers the mutual fit of organisations as important to their relationship. As mentioned earlier in the case of universities and promotional services, there is a theoretical conflict between a university, as an educational institution that should hold the values of education, and promotional services, as organisations operating in the corporate market with no official commitment to education. Before discussing theories of education and market values, the basic concept of values is defined.

3.3.1 Defining values

One definition of values says that value is anything good or bad (Pepper, 1970). This is a very open definition that leaves much space for discussion. Everybody assigns the attributes of good or bad differently, according to their values. The use of photographs for a university brochure is a relevant example. For some marketers, the use of pictures displaying happy, beautiful people in a beautiful environment is an example of good practice in advertising. For some critics, on the other hand, this represents an unrealistic and inappropriate picture of university life (Klassen, 2001). Even though Pepper's definition captures well the essence of what values are, it is interesting to look deeper into the concept of values.

Another definition says that values are 'concepts of beliefs, about end states of behaviours that transcend specific situation, guide selection or evaluation of behaviour and events, and are ordered by relative importance' (Schwarz & Bilsky, 1987, p. 551). This definition brings up the issue of beliefs. Beliefs and attitudes are related to values. Rokeach (1969), for example, finds a hierarchical order between beliefs, attitudes and values. He defines beliefs as 'inferences made by an observer about underlying states of expectancy' (Rokeach, 1969, p. 2). The 'observer' might be the person herself. Attitudes are then 'an organisation of several beliefs focused on a specific object or situation, predisposing one to respond in some preferential manner' (Rokeach, 1969, p. 156). Attitudes represent a 'package of beliefs' that make people act in a certain way. Values then encompass both beliefs and attitudes. Value 'is a single belief that transcendentally guides actions and judgements beyond immediate goals to more ultimate end-states of existence' (Rokeach, 1969, p. 160).

For the purpose of the research, beliefs, attitudes and values are important. They may appear in different forms and participants may express them in different words, because people usually use words interchangeably without aspiring to definitions. However, it is useful to see that, in theory, beliefs are judgements made by a person yet might not guide the actions of that person, whereas values guide people's actions.

Rokeach (1969) also distinguishes between preferable modes of conduct, or instrumental values, and preferable end states, or terminal values. For example, most universities want to be world-renowned, respected educational institutions with many students applying to them (terminal value), but each institution has a different way of achieving it (instrumental value).

This research looks at the relationship between universities and promotional services. Universities are traditionally expected to follow a set of educational values. Promotional services, on the other hand, are independent from universities and might work with corporate clients as well as educational institutions. Promotional services compete in the market for clients and may develop their own modes of conduct and value systems. The research, therefore, looks closely at the theory of the educational and market value systems in order to examine their relevance for the university–promotional service relationship.

Historically, a number of perspectives were developed to capture the essence and modes of conduct of education and the market. The following sections review these perspectives and contrast them with the current discussion on values of HE.

3.3.2 Theoretical values of the economic market and their link to marketing

The literature review explained that market and marketing are closely related concepts. The key component of marketing is an exchange: 'marketing does not occur unless there are two or more parties, each with something to exchange, and both able to carry out communications and distribution' (Kotler & Zaltman, 1971). These exchanges occur in the market (this market does not always behave as a perfect economic market; and, for marketing, the market is simply the place of exchange). The nature of the market then influences the nature of the marketing activities. Marketing is, therefore, closely related to the environment where it operates. As the literature review indicated, the UK HE environment is moving towards the economic market logic where ‘there is a new emphasis on value for money, accountability, planning, efficiency, good management, resource allocation, unit costs, performance indicators and selectivity’ (Barnett, 1990, p. 25).

Marketing practice not only enables organisations to survive, but influences and shapes the environment. The problem is that marketing and education may be in conflict with each other. Gibbs and Murphy (2009) argue that marketing for HE should adopt specific ethical principles and the principles they developed provide guidelines for professional ethics, institutional ethical policies, and ethical culture and philosophy. The idea is that universities’ marketing practice should be aligned with the mission and vision of the university and specific attention should be paid to the vulnerability of new entrants in HE, the length of time taken out to study, the veracity of estimates of the return of investment in HE, and the degree to which students might be transformed by education. However, as Gibbs and Murphy (2009) state, not many institutions or professional organisations have adopted such ethical principles. There are, for example, instances where universities’ promotional material seems to be saying nothing other than ‘come to us and be beautiful and successful’, agents being paid by the numbers of enrolled, with over-admission and consequent attrition during the first or second semester (Fiske, 1981), part truths in promoting a university’s league position, the use of incentives (financial or material) to attract students, and the promotion of star professors unlikely to come into teaching contact with students (Gibbs & Murphy, 2009).

The main issue is that the intrinsic values of the market are different from those in education. Therefore, when marketing uncritically serves the market, there is a potential threat to education and its traditional values. McMurtry (1991) analysed the self-description and practices of the capitalist market system in order to identify the values of the economic market. He studied the text of a number of proponents of capitalist markets such as Milton Friedman and Friedrich Hayek and summarised the goals, motivations, methods and standards of excellence characteristic of market ideology. He says that the goal of ‘corporate agents in the marketplace is to **maximize private money profits**’, the motivation is ‘**satisfying the wants of whoever has the money to purchase the goods that are wanted**’, the method of the market ‘**is to buy or to sell the goods it has to offer to anyone for whatever price one can get**’ and the standard of excellence is ‘**how well a product line is made to sell and how problem-free the product is and remains for its buyers**’ (McMurtry, 1991, pp. 211–213). The previous section identified a broad definition of values. McMurtry’s goals, motivations, methods and standards fall within this definition. There is not enough literature that looks at marketers of HE, however a paper published by Gibbs (2004) suggests that HE marketers hold and believe in market values.

Gibbs (2009) also argues that marketing tries to achieve **predetermined ends** through the application of marketing strategies, which is problematic in education, because education does not and cannot have predetermined ends (e.g. promise of a good job after graduation, or promise of understanding certain discipline). Marketing, however, has its own history of engaging with ethics and values. For instance, the aim of societal marketing remains satisfying customers’ needs and wants (a terminal value). But this has to be done in a way that preserves or enhances consumer and society well-being (an instrumental value) (Kotler, 2001).

It could be argued that education, by default, belongs to this category, because education mostly enhances consumer and society well-being. However, in an environment where universities compete for a high-paying student this assertion cannot be taken for granted. Also, as mentioned above, the discipline of ethical marketing comes into consideration. Ethical marketing aims to attain values considered to be morally correct (e.g. keeping promises, honouring contracts, telling the truth) (McKinley, 2012). In HE this is achieved by aligning university marketing with the university’s mission and vision, and paying attention to the specifics of HE (as foreshadowed by Gibbs and Murphy (2009). Adopting educational values is arguably another condition of ethical marketing for HE. Such values have been theorised numerous times (Barnett, 1990; McMurtry, 1991; Thorton, 2009). It could be argued that, by adopting ethical principles, education can utilise the benefits of elaborate marketing strategies and at the same time preserve its values and principles. However, in practice such an ideal state is often difficult to achieve. The theoretical values of education are discussed in the following section.

3.3.3 Theoretical values of education

Minogue (1973) argues that education is too often discussed from functional perspectives that overshadow its intrinsic role. These try to evaluate HE in terms of 'its demonstrable impact on the wealth-generating capacity of society' (Barnett, 1990, p. 4). They advocate an important function of HE, however represent only one side of HE's contribution to the society. The other side, the non-wealth contribution, recognises HE **contribution to both public and private good** and is based on the intrinsic character of HE and lies in the traditional values associated with HE. Barnett (1990) examines the history of the thoughts and practice of HE and says that the intrinsic value of HE lies in the **independent, deep knowledge acquired by student and the skill of radical questioning of this knowledge, by the same student**.

McMurtry (1991) summarises the traditional values associated with HE. He bases his analysis on statements of academic freedoms and 'recognized common elements of practice and declaration by peer-reviewed university institutions' (McMurtry, 1991, p. 217). He concludes that that the goal of education is to '**advance and disseminate shared knowledge**'; its motivation is '**to develop sound understanding whether it is wanted or not**'; its method is **autonomous fulfilment of requirements**; and the standard of excellence is **disinterested, impartial representations and possessing deep and broad problems** (McMurtry, 1991, p. 211–213).

These are believed to be important values that are characteristic for education free from supressing powers. However, as McMurtry (1988, p. 209) claims:

> *the history of development of social intelligence is largely a history of this conflict between the claims of education and inquiry, on the one hand, and the demands of ruling interests and ideologies on the other hand.*

Currently the economic market system seems to be a dominant ideology.

Other philosophers have commented on the desired nature of HE. Humboldt, Newman and Jasper are among classical educational thinkers and Humboldt, for example, valued freedom of teaching, unity of research and teaching, and academic self-governance. In Humboldt's time (the seventeenth century) the context and conditions of HE were different from the current environment, but the idea of **freedom of teaching, unity of research and academic self-governance** remain topical (Thorton, 2009). Newman also believed that universities should not be about narrow professional education but about **learning how to think**. Despite the fact that his work was connected to the Catholic Church, he believed that knowledge should **not be biased by religion or morals**. Newman promoted **knowledge for its own sake and for training good members of society** (Thorton, 2009). For Jasper, the university was also a community engaged in the task of seeking truth. For this reason, research should be in the forefront of university activity (Thorton, 2009).

These authors who dealt with the problems of their time are surprisingly relevant to our day. Their principles of academic freedom, the connection between teaching and research and knowledge for its own sake are present in current debates and reflected in values advocated by Barnett (1990) and McMurtry (1991).

Gibbs (2002) suggests that public funding should remain a significant contribution to HE and that the activities of HEIs are for the public good. Nevertheless, at present in the UK the opposite is the case. Public funding for HE is decreasing and students' fees are increasing. In such an economy, where it is dependent on its performance and profit making, a university's objective is not only to offer education but to survive in the competitive marketplace.

Currently a number of interesting projects are undertaken concerning the purpose of universities. The UK University Alliance, for example, has drawn up four possible scenarios for universities' future: uni-divide, uni-public, uni-wifi and uni-market. In the uni-divide scenario, there is a two-tier sector with leading universities charging high fees and having a monopoly on overseas students, with other universities turning into businesses. The uni-public represents a scenario where there are fewer universities; universities are seen as part of public good so are supported by public budgets. The uni-wifi shows a possible future where universities are supported by both public and private budgets, yet are no longer focused on their individual brand but on building the brand of an all-university network. The uni-market scenario then tries to predict what would happen to universities if market logic is further promoted. In this scenario universities are believed to be the gateway to economic success, and families and students accept the financial debt caused by high tuition fees and the loan system. In this scenario social mobility further declines and public funding is limited and is awarded through competition. It seems that the uni-divide and the uni-market scenarios quite closely reflect the current situation of UK HE. The aim of these scenarios is to motivate discussion about the future of universities (UA, 2012). Another UK project, Enlivened Learning, was initiated by two academics who felt that the competitive pressure of their institutions was frustrating, unproductive and denied the essence of knowledge and learning. They embarked on a journey around the world, looking for alternative ways of HE (Enlivedlearning, 2013).

Barnett (2012) also discusses and challenges the current HE system. He developed a number of descriptions of current and possible university, for instance the 'hopelessly impoverished university', where the idea of university is shrinking because the discourse is mainly about market, business and competition, and 'undue pessimism', a portrait of a university of today with its managerialism, commodification and performance criteria. The optimistic ideas about the possible university are called 'feasible utopias'. Here, for example, belongs the 'the therapeutic university' or the 'ecological university' Barnett (2012).

All these scenarios and descriptions partially capture the current situation at universities. They are, however, too abstract. This research aims to understand the values of university marketing personnel and promotional services personnel, and to contrast the empirical data with the theory. A specific theory of education and market values is, therefore, incorporated in the theoretical framework of this research.

3.3.4 Set of values for theoretical framework

In order to assess the values of universities and promotional services critically, this research contrasts the theoretical values with collected empirical data. For this purpose the framework developed by McMurtry (1991) is taken forward. McMurtry's framework was chosen because it helpfully demonstrates the possible differences between the education and market values and because it covers most of the ideas developed by the above cited educational scholars.

However, such framework cannot be adapted uncritically. Firstly, it is important to look at the source of McMurtry's values. The framework was developed by analysing 'respective self-descriptions and practices of the capitalist market system and the twentieth century university' (McMurtry 1991, p. 217). Nevertheless, it also holds that this literature is too extensive to be summarised, therefore only two examples of market logic are given. First, the work of Friedrich Hayek is presented: 'It is necessary in the first instance that the parties in the market should be free to produce, sell and buy anything that may be produced or sold at all' (Hayek, 1947, in McMurtry 1991, p. 217). Second, the title of Milton Friedman's book is cited: *The Social Responsibility of Business is to Increase its Profits* (Friedman, 1970, in McMurtry 1991, p. 217). For educational values McMurtry uses 'the more or less standard statements of academic freedoms codified by faculty associations across the developed world as well as recognised common elements of practice and declaration' (McMurtry 1991, p. 217). From such statements it is difficult to judge the accuracy of the developed framework. It seems, however, that it is highly idealised. For example, the theories developed by Milton Friedman and Friedrich Hayek were in reaction to the post-World War II period, when state planning and propaganda were prevalent. Nowadays we have enough evidence to suggest that every extreme is destructive, whether it is power in the hands of government or power in the 'invisible hand of the market'. We therefore have to ask how relevant McMurtry's values are in today's globalised world? The global impact of economic, political, technological and cultural trends is widely discussed in the HE literature. The question is, whether these trends make McMurtry's values (developed 25 years ago) irrelevant or whether despite the rapid changes in the HE environment the values still resemble a valid framework for analysing the HE environment.

The economic and political trends usually relate to the development of global capitalism which is mainly represented by the marketisation and privatisation of HE. As mentioned in the literature review, we can find both advocates and opponents of these processes. The advocates tend to say that market can improve economic efficiency; provide greater value for money; enhance innovation: a more cost effective way of achieving goals; increase quality and the ability to compete more effectively internationally (Hemsley-Brown, 2011). On the other hand the opponents claim that such processes undermine the autonomy of universities and are ultimately destructive for HE because they oppose the traditional values of HE (Barnett, 2012; Brown & Carasso 2013). McMurtry's values directly relate to these discussions, they are, therefore, highly relevant when looking at economic and political trends in today's HE.

From the technological perspective, current trends relate to the use of new information technology (computers, internet), the knowledge economy and related use of technology for economic purposes (Robinson, 2007). Application of technology in education also has its proponents and opponents. The advocates believe that technology made learning richer, more accessible and more effective because of the networks that have been made possible via the Internet (Ryan, 2004). The development of MOOCs (Massive Online Open Courses) is a good example. MOOCs were supposed to open higher education to masses and increase HE participation rates (FutureLearn 2013; Lane 2013). It is true that more than million people world-wide enrolled in MOOCs, therefore arguably technology made education more accessible, nevertheless it is not clear whether MOOCs are efficient teaching tools and the economic value of MOOCs also constitutes a controversial issue (Parr, 2014). The literature discusses in detail the pros and cons of MOOCs and other technologically underpinned educational methods and questions related to educational and financial efficiency are often asked (Conole 2013). Therefore, values foreshadowed by McMurtry (e.g. autonomous fulfilment of requirements and possessing deep and broad problems vs. generating profit) are relevant even in the era of the networked society and knowledge economy.

The above discussions can be easily related to the other level of global impact – the cultural impact. Cultural forms, flows and belief systems are globalising (Robinson, 2007). To use the same example, thousands of students across the world are taking the same MOOC courses, with the same content, from the same instructor. Such trends are often called the McDonaldisation of HE. McDonaldisation is characterised by standardisation (e.g. the same course, the same content to thousands of students), calculability (e.g. the universities' ranking where objectives are quantified and quantity equals quality (Hazelkorn, 2013), and efficiency (represented for example by the increase of managerialist culture in HE) (Ritzer, 2008). Here again the values identified by McMurtry are relevant, because the changing culture of HE is often criticised for increasingly favouring market values over educational values.

It can be therefore concluded that values identified by McMurtry are relevant even in today's globalised HE. Nevertheless, even though they represent relevant framework for analysing the values of education and market, they are abstract and not anchored in a real context dependent situation. This thesis therefore uses McMurtry's list of values and critically assesses their applicability in a specific context of the University – Promotional services interaction.

It is however challenging to apply McMurtry's values to marketing for HE. McMurtry (1991, p. 213) seems to consider marketing to be closely related to the market values:

> *it is well known that the highest aim of market communications is to impel its recipients into wanting to buy a product. This is achieved by one-sided sales pitches and processes of operant conditioning which work precisely because they are not understood.*

Nevertheless, this is a one-sided statement that overlooks the history of the development of marketing sciences and the whole notion of ethical and societal marketing.

The concerns raised here will be contrasted with the empirical data collected for this study. For the purposes of the theoretical framework, McMurtry's values will be adopted but treated with caution. Also the clear divide between the education and market values needs to be challenged. McMurtry claims that the values are opposed to each other and therefore mutually exclusive. Because of the above criticism, such a divide cannot be uncritically accepted. For the purposes of the theoretical framework, the values will therefore be treated simply as a set of values, not two sets of opposed values.

The theoretical framework relating to values therefore consists of market and educational goals, motivations, methods and standards of excellence as suggested by McMurtry (1991). The goal of the market is to 'maximise private money profit', whereas the goal of education is to 'advance and disseminate shared knowledge'. The motivation of the market is to 'satisfy the wants of whoever has the money to purchase the goods that are wanted'. The motivation of education then is 'developing sound understanding whether it is wanted or not'. The method of the market is to 'buy or sell the goods it has to offer to anyone for whatever price one can get'. The method of education is 'not to buy or sell to anyone, but to require of all who would have it that they fulfil its requirement autonomously'. The market's standard of excellence than is 'a well-made and problem-free product line', whereas education's standard of excellence is 'disinterested and impartial information, and possessing deep and broad problems'.

These values will be reflected and contrasted with the collected data. However, before discussing the data collection methods, one last theoretical concept needs to be introduced: the concept of outsourcing. Outsourcing is also closely related to values, because it makes us question the applicability of education and market values to organisations external to universities. Outsourcing is an important issue for HE, because universities increasingly use management and marketing techniques (such as outsourcing) to achieve institutional objectives (Hemsley-Brown & Oplatka, 2006; Kirp, 2002). Using external promotional services is a specific example of outsourcing techniques.

3.3.5 The conflictive nature of outsourcing

Outsourcing is a managerial concept that originally represented usually overseas contracts between corporations (Palm, 2001). Today, outsourcing is a buzzword that simply represents contracts between organisations, no matter where they are. Universities now extensively outsource a wide variety of services (from bookstores, accommodation, catering and marketing to teaching) (Bartem & Manning, 2001). The main reasons for outsourcing services usually are: reducing cost, improving company focus, gaining capabilities, freeing up resources for other purposes, obtaining resources not available internally, accelerating reengineering, freeing themselves of a function that is difficult to manage and sharing risk (Palm, 2001).

However, the benefits of outsourcing are disputable and highly dependent on the specific arrangements, such as clear and realistic vision, plan, targets, governance arrangements, and good communication with staff and stakeholders (KPMG, 2009). Currently, there is little evidence on savings achieved through outsourcing (KPMG, 2009) and promised cost savings are 'generally eaten up by the "forgotten" start-up, monitoring and renegotiating costs' (Jefferys, 2012). Moreover, some literature suggests that outsourcing can compromise the quality of the service, raise human resources problems

(Jefferys, 2012), lead to lower levels of job satisfaction and higher stress (Huws, 2012), loss of control and knowledge (Deloittes, 2005), or even cause ethical problems and the triumph of market values over academic values (Allen, Kern, & Mattison, 2002; Kirp, 2002). Nevertheless, outsourcing is still recommended by some academics and professionals (Bartem & Manning, 2001; Vedder et al., 2010) and supported by government bodies (HEFCE, 2013; KPMG, 2009). Meanwhile, the literature discusses the benefits and threads of outsourcing (Shaw, 2013), and students' and universities' unions organise demonstrations and protests against outsourcing at universities (Gray, 2013; UCU, 2013). However, there is no research specifically looking at the issue of value conflicts relating to universities' outsourcing promotional services. The present research aims to fill the gap by critically examining the interaction between a specific university and promotional services.

3.4 Summary of the literature and theoretical review

The literature review identified the close relationship between the marketing discipline and economic market theory. The efforts of the UK government to introduce economic market logic to HE relate to the marketing activities of universities. Universities more than ever before are adopting managerial techniques such as outsourcing (Kirp, 2002). Such activities are met with both enthusiasm and criticism.

There is, however, insufficient evidence to support or reject such activities. Moreover, we need to distinguish between different types of outsourcing; outsourcing the catering services has a different impact on the university than outsourcing the promotional services. This research looks at the phenomenon of promotional services outsourcing. Theories identified in the literature review (economic market theory and the Marketing Mix) built one part of the theoretical framework for this study. The theoretical review, however, identified other important theories used to frame the study. First, the IMP Interaction framework is adopted to frame the relationship between the buyer (the university) and the seller (the promotional services). This framework is helpful to a general understanding of the relationship. However, the framework was developed for industrial relationships and the context of the IMP Interaction framework does not reflect the complex context of HE (as discussed in the literature review). Therefore, the context of the IMP theory needs to be questioned and re-developed.

Moreover, as the literature and theoretical review highlight, the issue of HE marketing is highly sensitive. The main reason behind the controversy is the conflicting nature of education and market values. Values are therefore considered to be an important factor in the University–Promotional services relationship, and the values of the participating University and the Promotional services will be investigated and contrasted with the theoretical values of education and the market.

The theoretical framework for this study is therefore built from a number of theories (Figure 2). These are divided into primary theories (the IMP Interaction framework, the values of education and the values of the market) and secondary theories (elements of the agency–client relationship, the economic market mechanism, Marketing Mix and outsourcing). Primary theories guide the research questions, frame the data collection and play a major role in the analytical processes and discussion of findings. Secondary theories complement the discussion and deepen the understanding of the case.

The research questions directly address the relationship between the University and Promotional services and the explanatory power of primary theories.

The research questions

1. What characterises the relationship between the University and Promotional services?
2. Is context important for understanding the relationship between the University and the Promotional services and does this comply with the IMP Interaction theory?
3. Are the values of the University and Promotional services aligned?
    3.1. What are the values of the University and do they conform to the theory of market or educational values?
    3.2. What are the values of the Promotional services and do they conform to the theory of market or education values?

The nature of this research problem requires a specific approach to its philosophy and design. The research combines the views of the disciplines of education, economics and marketing. This approach lends itself to CR philosophy, which says that we live in an open system where a ‘multiplicity of mechanisms, belonging to the subject matter of different sciences, interact and conjointly determine the course of events’ (Collier, 2011, p. 16). No single social science can explain everything. CR philosophy encourages researchers to combine and deconstruct theories and research problems in the light of different disciplines and by doing so to challenge the ‘disciplinary imperialism’ (Collier, 2011, p. 343). This is why CR was chosen to guide the study. Moreover, CR ontology and epistemology offer an elaborate tool for thinking that can guide the research to an in-depth understanding of the research problem.

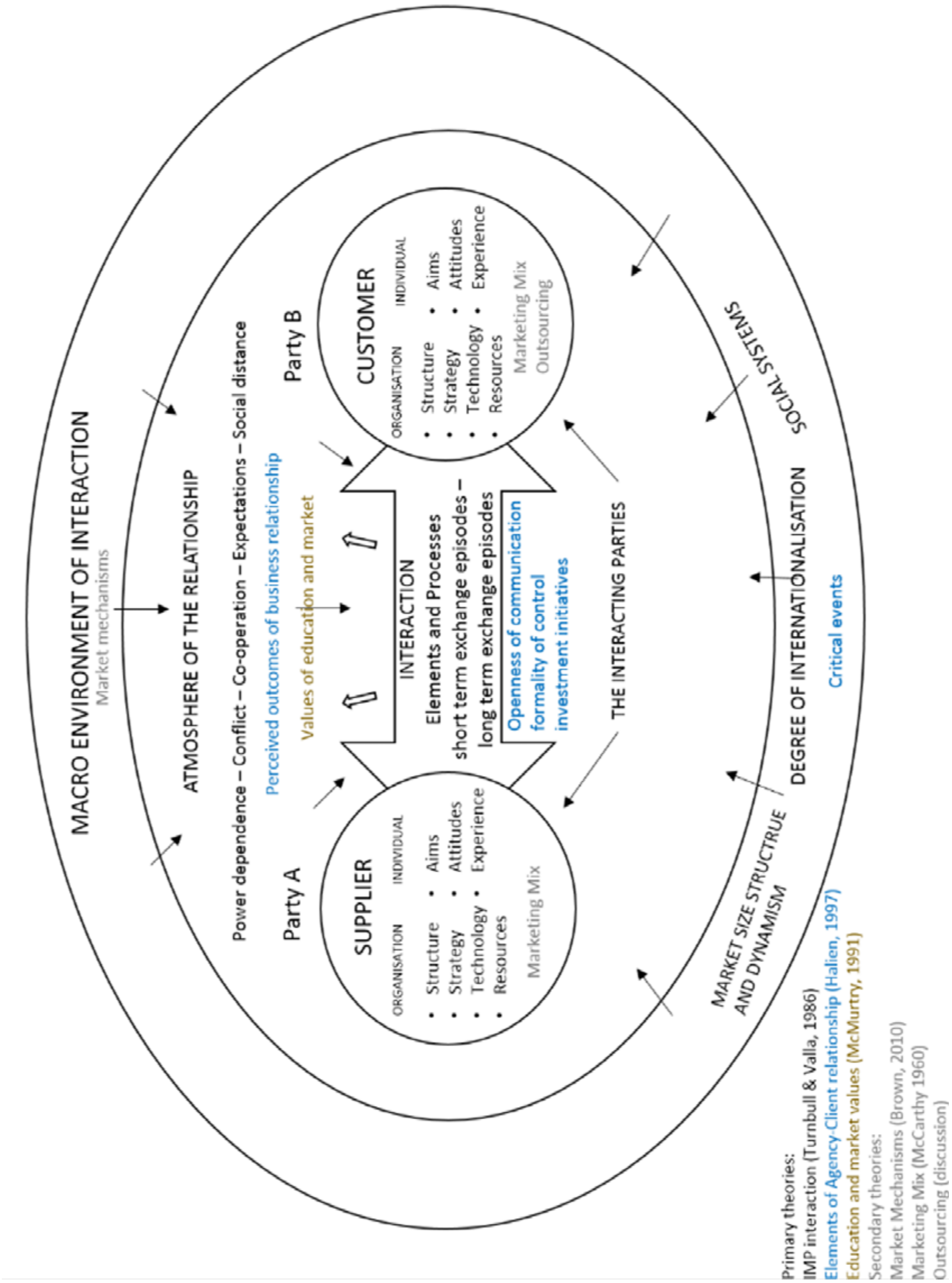

Figure 2. Theoretical framework of the study

4. Critical realist methodology for undertaking the study

This chapter first develops a discussion on research philosophies traditionally used in marketing and education research, then discusses in depth the chosen philosophy of CR. All research is conducted on the basis of philosophical assumptions about the essence of reality (research ontology), the nature and forms of knowledge (research epistemology) and ways of acquiring knowledge (research methodology) (Hunt & Hansen, 2010). Finding appropriate philosophy is particularly important for a project that combines different disciplines, because each has a different approach to research and theory. There is currently little discussion on the philosophies associated with research on marketing for HE. Positivism, relativism, interpretivism and realism are often forwarded as philosophies for marketing research, with each driving different methodological approaches in the field (Hunt & Hansen, 2010; Tadajewski, 2004). Education research also uses these philosophies, however, more often than marketing, education tends to adopt critical philosophies and approaches to conducting research.

Positivism assigns reality status to tangible entities (Hunt & Hansen, 2010). In positivism 'the scientist is a direct observer of social reality' and human behaviour is predictable and may be researched by methods of natural science (Cohen, Maninon, & Morrison, 2006, p. 8). It can be argued that positivism is favoured by many marketing researchers and by the editors of academic journals (Tadajewski, 2004). Positivist research usually uses quantitative methods such as questionnaires and experiments to understand consumer buying behaviour or educational effectiveness, and to develop general models applicable to the wider population (Ross & Grace, 2012). In contrast to positivism, interpretivism is characterised by a focus on the individual and the ever-changing and context-dependent reality (Cohen et al., 2006). Interpretivism is recognised and used in marketing research (Tadajewski, 2004) as well as education research (Cohen et al., 2006). Interpretivist studies typically use qualitative methods such as ethnography, phenomenology or grounded theory to understand consumer behaviour, classroom interaction, or student opinion (Goulding, 2005).

Another philosophy of research is relativism. In relativism things are always relative to something else 'and there are no objective standards for evaluating across the various kinds of "something else"' (Siegel, 1987, in Hunt & Hansen, 2010, p. 4). As an epistemological or ontological position it is rarely found in marketing or education research and often criticised for 'leading to the conclusion that all knowledge claims the researcher can possibly make are equally good, equally bad, equally right, equally wrong, equally ethical, equally unethical' (Hunt & Hansen, 2010, p. 2). Critical theories are different from the above philosophies. Cohen et al. (2006) argue that the aim of critical theories is not only to understand the phenomenon but to challenge or change it. However, criticality can be understood more broadly. For example, the use of specific research processes may deepen the criticality of a study; the ontology and epistemology of CR may, for instance, be considered as an important critical element, because the ontology calls for a deeper understanding of the causal mechanism and so critiques simple observation of reality (empiricism). Criticality in CR might also represent the tendency to challenge universal claims of truth (often made in positivistic science) by asserting the importance of the context of research findings. Another level of criticism relates to uncovering social causes of phenomena (e.g. this research does not only try to understand the relationship between universities and promotional services, but the reasons for such a relationship). The most applied level of criticality aims to change the situation, deconstruct power relationships and empower people, removing 'taken for granted' perspectives and enabling people themselves to reflect critically on their situation (Danermark et al., 1997, p. 234).

This research might indirectly result in changing the relationship between universities and promotional services (the final chapter provides a number of recommendations for practitioners), but the main aim of this research is to contribute to the theoretical understanding of the interaction between universities and promotional services, and so challenge existing theory and the conceptual divide between theories and disciplines. As mentioned above, CR supports this aim by encouraging the researcher to look at the research problem from a number of theoretical perspectives and critically engage with knowledge claims, methodologies and epistemologies. Nevertheless, as with any body of knowledge, there are many approaches and conceptualisations of critical realism.

4.1 Pillars of realist wisdom

Roy Bhaskar is considered to be the founder of the critical realist research philosophy. He started by observing how scientific experiments triggered a hypothetical mechanism in a known set of conditions. This led him to conclude that reality is interpreted by "theories of underlying generative mechanisms which organise the observable properties" (Bhaskar in Pawson 2013, p. 4). Bhaskar believed that such mechanisms represent the deepest ontological level - 'the real'. Other two levels consist of 'actual' and 'empirical'. His anti-monistic and anti-deductivistic view resulted in new research ontology (Bhaskar & Lawson, 1998). This research uses the critical realist ontology and discusses it in section 4.2.

Margaret Archer represents the second important pillar of realist wisdom. She applied Bhaskar's thinking to sociology by stating that social outcomes are generated by underlying mechanisms. Archer's specific contribution lies in claiming that society is in a state of permanent self-transformation (in which choices are conditioned by pre-existing structures). She termed this process the 'morphogenesis' (Archer, 1998). Archer's approach is certainly crucial in understanding that any studied case is fluid, she however does not advise the researcher how to capture the case in its fluidity. Archer's work is therefore rather abstract and its strong focus on sociology makes it unsuitable for this research.

Instead, this study choses to use the work of scholars who provide a constructive and applicable basis for working on a critical realist study. Andrew Sayer for example helpfully summarised the basic eight ontological assumption of critical realism (Sayer, 1992). Andrew Collier then encouraged researchers to combine disciplines and theories (Collier, 2011) and Berth Danermark designed a way of working with critical realist epistemology (Danermark, Ekstrom, Jakobsen, & Karlsson, 1997). Danermark's work is very useful when it comes to collecting and analysing critical realist studies, therefore it is used not only to understand the epistemological processes of critical realist study, but also to design an analytical framework for this research.

The following sections deconstruct the ways of researching within the critical realist ontology and epistemology.

4.2 Critical realism – ontology and epistemology

Every research philosophy is based on specific ontological and epistemological assumptions. Ontology explores what is 'the nature or form of the social world' (Waring, 2012, p. 16). Critical realism is based on eight **ontological** assumptions (Sayer, 1992, p. 5):

1. The world exists independently of our knowledge of it. In the case of this research this means that the university-promotional services interaction and the values of the research participants exist independently of the research and the theories used in it.

2. Our knowledge of the world is fallible and theory-laden. Concepts of truth and falsity fail to provide a coherent view of the relationship between knowledge and its object. Nevertheless, knowledge is not immune to empirical check and its effectiveness in informing and explaining successful material practice is not mere accident.

All our knowledge is theory-laden. The theory does not relate only to research and scientific theories but to our everyday life, our cultural conceptions, our own theories of how the world functions and our religion. All this can be challenged by other theories, someone else's views, other religions, other cultures and other scientific disciplines. That, however, does not mean that theories are useless. Theories can and often do work when explaining events and practice, however it is important to remember that theory can be fallible and the relationship between knowledge and its object develops over time. In the case of this research a number of theories is used to deconstruct the interaction between universities and promotional services. The theories will be re-developed in order to best capture the relationship between the university and promotional services.

3. Knowledge develops neither wholly continuously, as the steady accumulation of facts within a stable conceptual framework, nor discontinuously, through simultaneous and universal changes in concepts. This means that critical realism does not favour one way of data collection and knowledge development as does for example positivism (quantitative data) or interpretivism (qualitative data). CR instead practises critical methodological pluralism, which can include a number of methods, theories and inference processes as abduction and retroduction (these are explained in later section). The methodology chapter of this thesis reflects on this assumption.

4. There is necessity in the world; objects – whether natural or social – necessarily have particular powers or ways of acting and particular susceptibilities. This claim represents the understanding that every object (e.g. a person or an institution) has powers to act in a certain way. When these powers are exercised, events are generated (e.g. universities contract promotional services to produce a media campaign). The aim of CR research is not only to describe the events but to understand the mechanisms that caused the event.

5. The world is differentiated and stratified, consisting of events and also objects, including structures, with powers and liabilities capable of generating events. These structures may be present even where, as in the social and much of the natural world, they do not generate regular patterns of events.

This elaborates on the previous statement. CR distinguishes between three domains: the empirical, the actual and the real; 'the empirical domain is where experiences may be obtained by direct observation' (Ryan et al., 2009, p. 4). In the case of this research it means observing the interaction between the university and promotional services, and interviewing their representatives. The actual domain refers to what happens if and when powers are activated. This might correspond to characteristics of the relationship between the university and promotional services, or the discovery of other events that might not have been identified in the first instance (e.g. through a follow-up interview or analysis of additional documents). The real domain is anything that exists (natural or social) and also refers to structures and powers of an object (Sayer, 2000). The real is the domain of mechanisms, or 'nothing other than the ways of acting of things' (Bhaskar, 1975, p. 14) or 'features of things which produce certain outcomes given certain inputs' (Collier, 2011, p. 8). CR researchers aim to deepen knowledge and understanding by moving from the empirical to the real as levels of analysis. This is achieved by employing the CR framework for analysis (section 6.2), which aims to uncover structures of objects and the causal powers that influence events to happen.

6. Social phenomena such as actions, texts and institutions are concept-dependent. We have not only to explain their production and material effects but to understand, read or interpret what they mean. Although they have to be interpreted by starting from researchers' own frames of meaning, by and large they exist regardless of their interpretation by researchers.

This point directly addresses social phenomena such as the interaction between universities and promotional services. When trying to understand such social phenomena, we need to interpret what they mean. We therefore engage with hermeneutics (studying and interpreting other peoples' interpretations). This needs to be acknowledged and perhaps precautions taken to avoid bias (e.g. peer review, participants' review).

7. Science or the production of any kind of knowledge is a social practice. For better or worse (not just worse), the conditions and social relations of the production of knowledge influence its content. Knowledge is also largely – though not exclusively – linguistic, and the nature of language and the way we communicate are not incidental to what is known and communicated. Awareness of these relationships is vital in evaluating knowledge.

This point is well demonstrated in the present research, where two disciplines meet: marketing and education. Each has a different approach to understanding the social world. Marketing often aims to understand a social phenomenon (e.g. interaction between buyer and seller) and how to make it work better (Frazier et al., 1988; Wilson & Mummaleneni, 1986). Education, on the other hand, often adopts a critical perspective and studies the relationship between leadership and educational culture (Deem & Brehony, 2005; Gibbs, 2009), for example. The nature of the language is also important. For instance, education often refrains from using marketing language and instead of 'promotion' or 'advertising' refers to 'dissemination'. This research could adopt one of these perspectives and produce an acceptable thesis within one of the disciplines. However, it aims to interlink economic, education and marketing theories in order to increase the exploratory power of the research because, in practice, these disciplines interact.

8. Social science must be critical of its object. In order to be able to explain and understand social phenomena we have to evaluate them critically.

This relates to the ‘critical’ aspect of critical realism. As mentioned above, ‘criticality’ can be seen from a number of different perspectives. For example, using the ontology and epistemology of CR may be considered a critical approach towards traditional modes of research. Challenging universal claims of truth, uncovering social causes of phenomena or changing situations by deconstructing power relations and empowering people by removing ‘taken for granted’ are other aspects of a critical research process (Danermark et al., 1997).

These form the eight claims representing the basic assumptions of the CR research ontology. These assumptions directly affect the research’s epistemology and methodology. CR epistemology aims to uncover the mechanisms, the context relevant to the mechanisms and the outcome of the interaction between the mechanisms and the context: Mechanism + Context = Outcome (Pawson & Tilley, 1997). Figure 3 represents potential mechanisms, context and outcomes of this research.

Figure 3. Example of possible critical realist explanation

CR uses specific **epistemological** procedures to understand the reality. Epistemology examines ‘how can what is assumed to exist be known?’ (Waring, 2012, p. 16). The main epistemological processes related to the CR philosophy are abduction and retroduction.

Abduction refers to a level of theorisation of the case and incorporates the framing and reframing of the empirical phenomena within differing theoretical frameworks, the objective of which is the identification of the framework that best explains the phenomena. (Ryan et al., 2009, p. 14)

The theoretical framework of the research (Figure 2) is built from a number of theories that provide a helpful starting point for CR research. The IMP Interaction approach is an original framework for analysing the university–

promotional service interaction. The theory of the IMP Interaction framework (Hakasson, 1982; Turnbull & Valla, 1986) was developed as a critique of traditional OBB frameworks that look only at one side of the dyad (the buying party). The theoretical values of education and market are also incorporated in the model, which signifies the importance of underlying ideologies and how these can help explain the outcomes of the university–promotional service interaction. Other theories (secondary theories) are incorporated in the theoretical framework (e.g. the elements of agency–client relationship (Halien, 1997), market mechanisms (Brown, 2010), the 4P Marketing Mix (McCarthy 1960) and outsourcing (Palm 2001). These theories help to deepen the understanding and discussion of the findings. In CR research, the theory and empirical data interact in order to find the best-fitting theoretical explanation for the specific research. The aim is to challenge traditional concepts, to combine two or more theories, to develop those according to the studied phenomena and, finally, to construct a fitting framework for the research.

The aim of abduction is not to develop a new theory but to re-develop, mix or adjust existing theories to find an explanation for the research phenomena. The researcher constantly moves from theory to empirical data and back again, first to design the data collection tools and second, after data are collected, to see whether the framework is able to capture the relationship and explain the data. If not, another theory may be added to the framework, data may be contrasted with the new theory or more may collected in order to explain the phenomena. Creativity and imagination are important qualities on the part of the researcher (Danermark et al., 1997).

The other CR epistemological procedure is **retroduction**. During the retroduction stage the researcher comes back to the data and asks additional questions in order to identify the 'mechanisms that explain what caused particular events to occur' (Easton, 2010, p. 124). During the process, elements of induction and deduction may be used. The essence of this method is to continue to ask the question WHY (Easton, 2010); 'By this argumentation one seeks to clarify the basic prerequisites or conditions for social relationship, people's actions, reasoning and knowledge' (Danermark et al., 1997, p. 96). The aim of the social science research is not to keep asking the question WHY? until universal conditions for all human beings are discovered, but to reconstruct the system of social positions and dispositions structuring a particular action (Danermark et al., 1997). In the case of this research it is the interaction between university and promotional services.

It is not simple to discover the structures, conditions and mechanisms of acting things. There is no universal method for the retroduction process, however there are several strategies that can help uncover the mechanisms of the research problem. These strategies are described by Danermark et al. (1997, p. 101). They include counterfactual thinking, social experiments and thought experiments, studying pathological situations and extreme cases, and comparison of different cases. The strategy of counterfactual thinking, and social and thought experiments might be applied in the research retroduction processes. Counterfactual thinking is a method of understanding 'what something is in relation to what it is not'. This includes asking questions: 'How would this be if not...? Could one imagine X without...? Could one imagine X including this, without X then becoming something different?' (Danermark et al. 1997, p. 101), or 'Could one imagine universities doing all their marketing activity themselves?' or 'How would the advertisement look, were marketing personnel not involved?'. On the other hand, the strategy of social and thought experiments is based on provoking by threatening the order of things. Asking or answering questions in an unexpected way is one way to achieve this (e.g. What does marketing mean for you? How do you define marketing for HE?) (Danermark et al. 1997, p.101). Such answers may be contrasted to the theory of education and market values.

The CR research design embraces the ontological and epistemological principles and uses them to gain an understanding of the interaction between the University and Promotional services.

4.3 Designing the research

The first part of the research design considers the approach to the research process (including the type of the study, opportunities and threats resulting from choosing this particular type of study and criterion of quality). The second building block of the research design deals with the specific research process adopted by the study. The third part relates to the focus of the study, why the specific case has been chosen and the ethical considerations of the study.

The following four parts consist of the ethical considerations, the ways of working with theory, the data collection plan and the framework for analysis.

4.3.1 The case study approach

A case study approach is adopted by this research. It lends itself to the research problem because this involves investigating a complex relationship in depth, and it is also a good choice for business marketing research (Easton, 2010), where relationships and access to organisations is complicated. Case study is 'not a methodological choice but a choice of what is to be studied' (Stake, 1995, p. 443), and 'does not imply the use of a particular type of evidence' (Yin, 1981, p. 58). As Stake (2005, p. 443) says, 'we could study it analytically, or holistically, entirely be repeated measures or hermeneutically, organically or culturally, and by mixed methods – but we concentrate, at least for the time being, on the case'. In this research a particular university-promotional services relationship forms the case of interest.

Stake (1995) distinguishes between intrinsic and instrumental case study. In the intrinsic case study approach the researcher chooses one case and studies it for its uniqueness. In the instrumental case study approach the case is chosen to provide a general understanding of a phenomenon. The research aims to understand deeply and to describe the relationship between a University and Promotional services. Even though the understanding will be specific to the studied University and Promotional services, the result will facilitate a better understanding of the phenomenon. Therefore, from Stake's perspective, the study is instrumental. Yin (2009) defines a number of different case study types. For example, exploratory case study aims 'at defining the questions and hypotheses of a subsequent study…' or 'determining the feasibility of the desired research procedures' (Yin, 2003, p. 5). An explanatory case 'presents data bearing on cause-effect relationships – explaining how events happened' (Yin, 2003, p. 5). And descriptive case study, which applies to this research problem, aims at 'complete description of a phenomenon within its context' and uses descriptive theories rather than cause-effect theories (the theoretical framework is mainly built from the IMP Interaction model and the values of education and market) to cover the depth of the case (Yin, 2003, p. 5).

The case study design offers a number of advantages such as catching unique features of the case (Nisbet & Watt, 1984), the possibility of combining more research tools in a single case study (the multi-method approach) (Gillham, 2000), authenticity (using a participant's own accounts and view of events) (Scott & Morrison, 2007), or the possibility of embracing and building in unanticipated events and uncontrolled variables (Nisbet & Watt, 1984). On the other hand, case studies are criticised for being expensive, time consuming, prone to problems of observer bias (Nisbet & Watt, 1984), lacking in rigour and being impossible to generalise.

Every research method has its advantages and disadvantages. It is important to acknowledge these and deal with them accordingly. In this case the research benefits from a case study design because there is limited literature on universities using promotional services, therefore analysis of a single case provides in-depth understanding of the specific relationship. The research is not expensive, because it uses interviews that may be conducted online or personally. There is a risk of the research being overly time consuming, but this depends on the researcher's timing and the participants' availability. An important problem relating to case studies is the issue of observer bias, lack of rigour and difficulty of generalising. Researcher bias and respondent bias are the two main sources of bias in this research. The former could come from the use of emotional language or the researcher's affiliation. Two main ways of eliminating researcher bias are used in this research: first, how conclusions were reached is explicitly described and demonstrated in order for the reader to judge whether these were the most reasonable conclusions obtained from the data. Second, respondents had the opportunity to check the accuracy of their interview transcript to confirm that it is an accurate account of what they want to say. Respondent bias usually comes from respondents answering what they think the researcher wants to hear or what they think is an acceptable answer. In order to overcome this issue, respondents were assured about the confidentiality of the information and pseudonyms were assigned to their names and organisations, and a number of respondents were interviewed so that different answers and perspectives could be contrasted. The interview data were also partially contrasted with documents (e.g. University strategy, budget balance sheet for a campaign, University's and Promotional services' website).

Rigour is a controversial issue in qualitative research. Traditionally in quantitative studies, rigour is understood as the reliability and validity of the results. It is, however, difficult to apply these concepts to qualitative studies because they are highly context-sensitive, the subject of the study is not drawn from the population and 'there is no assumption from the outset that if the inquiry were to be repeated by different people at a different time, similar findings would result' (Thomas, 2011, p. 63).

These problems also apply to the issue of generalisation. As mentioned above, the subject of qualitative studies is not statistically drawn from the population, therefore there should be no assumption that the study is generalisable to that population. For that reason qualitative researchers try to generate alternative concepts, such as fuzzy generalisation (Bassey, 2000). However, neither is this type of generalisation helpful in qualitative studies, because with any type of qualitative generalisations we cannot say 'in any precise way under what conditions they hold' (MacIntyre, 1985, p. 91). This does not mean that there is no way that qualitative results of one study are applicable to another context. Often, there is an assumption that others can learn from understanding the specific study in a specific context in relation to their own context. The way to achieve such applicability is through abductive generalisation (generalisation to theory/phronesis or loose generalisation). This type of applicability/generalisation is closely linked to the CR research design, because CR generalisability is characterised by discovering the conditions for an object to be what it is (Danermark et al., 1997). The CR researcher seeks to discover fundamental properties and structures of the object under investigation and the generative mechanisms. Critical realism believes that, when using abductive approach to the analysis of causal powers of the objects under investigation, even a single case study may 'create or test theory to the extent that it uncovers reality' (Easton, 1995, p. 382).

Abduction is looking for the clearest explanation of the study. This is achieved by combining and contrasting results with a number of theoretical perspectives and by concentrating on the quality of the study. Quality in qualitative studies can be judged by the clarity of writing (consistency in use of terms, definitions provided where necessary, well-constructed sentences), addressing the research problem or research question (clear outline of addressing the research problem, providing sufficient rationale for the significance of the study), justification of the method used for the study, sufficient information about the research process and the researcher, and clear links between conclusions and evidence (Hammersley, 2005). Hammersley (2005, p. 6), however, stresses that these criteria are ‘issues for threshold judgement’, but that they should not be operationalised in terms of scoring and counterbalancing.

The CR research process described below constitutes a significant step towards achieving quality and abductive generalisability.

4.3.2 Critical realist research process

Critical realism offers a specific framework for undertaking research in social sciences (Danermark et al., 1997, p. 109). The framework developed by Danermark et al. (1997) was used by other researchers (Bygstad & Munkvold, 2011; Ryan et al., 2009). Danermark’s et al. (1997) model follows the basic epistemological assumptions of CR and consists of six stages: description; analytical resolution; abduction/theoretical re-description; retroduction; comparison of different theories and abstractions; concretisation and contextualisation. It was used to guide the research process and the analysis. First, the abductive research design was adopted to frame the research problem and to collect the data, then a CR analytical framework incorporating all the stages of Danermark’s et al. (1997) model was developed. The framework was developed during the scoping study and will be described in section 6.2. The application of Danermark’s et al. (1997) model will therefore not be specifically described here, because it is interwoven through the entire process of research and analysis.

4.3.3 Selection of the case, focus of the study

The point of a case study is not to find a proportion that shows the quality of the whole (Thomas, 2011). In case study, a deep and context-dependent understanding of a singleness of a case is of interest to the researcher. Case study does not intend to generalise to a population, however; thanks to the richness of the case description an abductive or theoretical generalisation is possible. The selection of the case is then not based on probabilistic or non-probabilistic sampling from the population, but rather on the uniqueness of the case. There are three ways of selecting the case and all three are valid. A case may be selected because of the researcher's familiarity and knowledge of the situation or its exemplary nature, or because it is somehow special and different from others (Thomas, 2011).

This research first selected a specific University and a Portal on the basis of knowledge of the case. The relative closeness of the researcher to the case was essential, because access to organisations in business is difficult. Thanks to the researcher's initial contacts within the University and the Portal, it was possible to establish a relationship with the organisations, to gain the trust of their management and to conduct a scoping study. This revealed that there is a mediating agency between the University and the Portal – the Agency. A contact with the Agency was then established.

The University, the Agency and the Portal are a good example of university–promotional service interaction. The University is a public Russell Group institution and is therefore a traditional UK research institution and case study reveals the changing nature of such establishments. The Agency is a UK-based promotional agency with more than fifteen years' experience of HE marketing. It is a private organisation working with over twenty UK-based universities, of which some are Russell Group and others are post-1992 and 2004 universities. The Portal is an internet-based promotional service for HEIs with over a thousand HEI clients. It is a private enterprise organisation that is at the same time publically co-funded. The Portal promotes universities from a specific region to students around the world.

The research participants are, therefore, related to both public and private organisations. The nature of such research requires careful ethical consideration.

4.3.4 Ethical considerations

Ethical issues may be discussed from two perspectives. First, the official procedures for obtaining ethical permission are described, then a debate on specific considerations, possible ethical issues and the best way to deal with them is developed.

The official procedures for obtaining ethical approval include submission of an ethical application through a web-based online system. This consists of a description of the project, description and solution of potential risks, a participant information sheet, consent form and interview schedule. The Ethical Committee approved the project in July 2012.

The main points of the ethical protocol state that the identity of participants will be protected by assigning pseudonyms to participants' names and that identity protection of the organisation will be assumed in all cases unless specifically waived (in writing) for each publication. Also, the protocol states that the researcher has to obtain organisational agreement before interviewing participants and each must see the participant information sheet and sign the consent form.

Specific consideration was paid to sensitive business information. There might be a situation where the University or the Promotional services spoke of sensitive information that could negatively influence the business relationship. For this reason, the data are considered to be confidential and participants have the opportunity to see their interview transcript to comment on it and withdraw any sensitive information.

The actual process of obtaining the permissions and consent forms was unproblematic. The researcher obtained all necessary permissions personally or via email (participants signed the forms, scanned them and emailed them back). There were no specific issues or requirements from the participating University apart from a participant who wished to alter the interview transcript. The changes, however, did not change the meaning; only certain expressions were edited, additional explanatory information added and grammar corrected. The Portal and Agency, however, expressed worries over the confidentiality of the data. The Portal was afraid that pseudonyms would not conceal the identity of the Portal, therefore wanted to see the findings before they were publically available. The Agency wanted to ensure that University MOs had no access to the specific interview transcripts.

Such requests represented important issues that needed to be carefully considered by the researcher. It was essential to reach agreement with the participants, but it was also important that findings were not altered. The researcher, therefore, agreed with the participants that the thesis should first be submitted to an academic audience for viva examination and, when finished, would be embargoed for six months. During this time the thesis would be presented to participants (firstly to the Portal and the Agency, because they expressed concern over the confidentiality, and secondly to the University). If participants feel that it is possible to identify their business, steps towards further confidentiality might be taken (e.g. changing the pseudonyms). However, if participants feel that they do not want the findings to be public, the only possible step is to extend the embargo of the thesis.

4.3.5 Ways of working with theory

The theory in this study is used in two ways. First, the primary theories (presented in the theoretical framework, Figure 2) are used to establish the essential aspects of the relationship between the University and the Promotional services, the boundaries of the relationship and the framing of the research instruments (see Appendix 1 document on aligning theory and interview questions, and research question). Second, theory is be used in the second stage of the data analysis – the theoretical re-description (abduction) when theories are contrasted with the data in order to discuss the extent to which the case study complies with these theories.

Aligning the research instruments with the IMP theory was an intuitive process and it was possible to design interview questions directly relating to the theory. This is because IMP theory almost lists general aspects considered essential to the relationship between organisations. Addressing these creates a complex account of the relationship yet does not impose specific ideology on participants. However, researching values is a complicated task and it is not possible to design questions that would directly address the theory of education or market values, because such questions would steer answers towards theoretical values. A way of defining and researching values therefore needed to be identified and a specific way of researching values was designed after the scoping study (section 5.4).

4.3.6 Data collection

The research uses qualitative data collection and analysis tools. Data are collected at an individual level, where the participants represent the University users of the Promotional services and the Promotional services teams working with the University. Data were collected in two stages. In the first stage a scoping study was conducted and analysed. In the second stage the results from this study were used to inform the main study data collection. Data from both the scoping study and the main study were used for the final analysis.

4.3.7 Linking the methodology with the scoping study

Chapter 4 described the philosophy and design of the research in detail. The reasons for choosing the CR philosophy were presented and the case study approach, its link to CR research process and its advantages and disadvantages were discussed. The selection of the specific University and Promotional services was justified and ways of dealing with ethical challenges were developed. Also, the way of working with theory and the data collection process was designed, consisting of a scoping study and main study. The framework for analysing the study is not discussed in this chapter, because such framework follows Danermark et al.'s (1997) theory of research design and is finalised only after the scoping study. The scoping study used basic coding techniques to analyse the interviews.

5. The scoping study

The aim of the scoping study was to test the design of the study and the data collection, and to develop data analysis procedures. This was to inform the research process of the main study and to build an initial understanding of the relationship between the University and the Portal. Criteria for successful scoping (Figure 4) study were developed before the study was conducted:

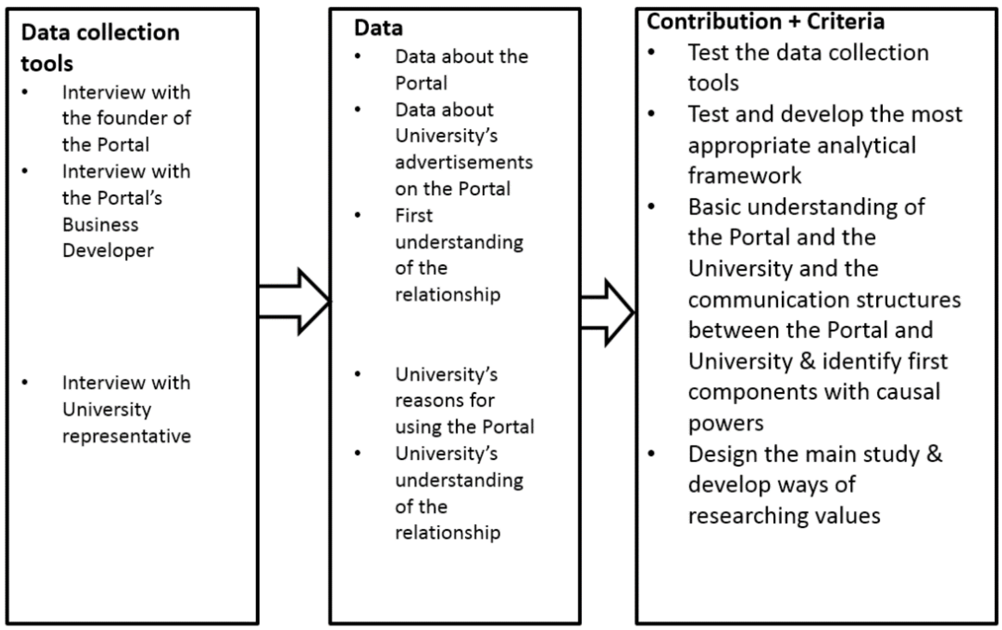

Figure 4. The scoping study's contribution to the main study and criteria for successful scoping study

The scoping study looked mainly at the basic features of the promotional Portal and the University. For that reason the scoping study interview schedule mainly drew on the IMP Interaction model and looked at the structure of the Portal and the University, the strategy, technology, resources, aims, attitudes, individual aims and experiences, interaction, the atmosphere of the relationship and the environment.

Before any interviews were conducted, the researcher studied the website of the Portal and the University to obtain a good understanding of how these organisations present themselves. The interviews with the Portal manager and the sales representative of the Portal were conducted online (using Skype). The Portal team is geographically spread, therefore it was assumed that they are used to online communication and that it was not necessary for the researcher to travel to meet the participants personally, although the interviews with University MOs were conducted personally.

During the scoping study, it was important to obtain answers to specific questions, but the interviewees were also encouraged to talk about the relationship between the University and the Portal freely and to express their perceptions and understanding of the relationship in their own way. The interviews were audio recorded and transcribed. Memos were written after each interview.

5.1 The experience of conducting the scoping study

The actual process of the scoping study followed the original plan – interviews were collected personally or online via Skype. The main issue was the timing. The original plan was to collect all data in August 2012 (three interviews) but this was not possible because of the time availability of the Portal's participants. The interview with the director could be undertaken only in September 2012, while and the interview with the business development representative responsible for the relationship with the chosen University was conducted only in October 2012.

It was important to obtain the University contact person's details from the Portal, because the University is a large organisation where anyone from the Corporate marketing department, international office or faculties has the right to use the service. The Portal, therefore, identified the University contact and this person was contacted in October 2012 but, because of the time availability of the participant, the interview could be conducted only at the beginning of November 2012 (Figure 5). Each interview was about 50–60 minutes long. Skype interviews proved to be a good data collection instrument. Interviews were transcribed and participants had the chance to view and comment on their transcript. Coding techniques were used to analyse the interviews.

Key:
P/D – Portal - Director
P/BD – Portal - Business Development representative
U/MO1 – University - Marketing Officer 1

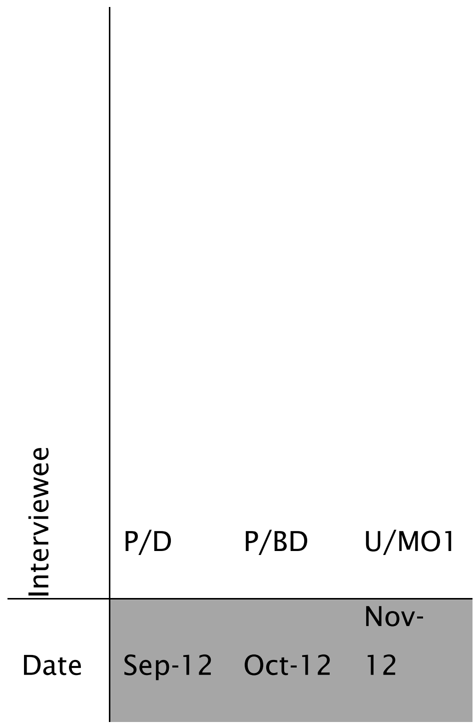

Figure 5. Scoping study interview timeline

5.2 Analysis of the scoping study

NVivo software was used to manage the data. The scoping study was analysed through basic, first-cycle coding techniques. Attribute, simultaneous, descriptive, in vivo and value coding techniques were used. The attribute coding captured basic descriptive information (participant's pseudonym, participant's position, institution's pseudonym, date of the interview). Simultaneous coding refers to the 'application of two or more different codes to a single qualitative datum' (Saldana, 2009). Descriptive coding captures the basic topic of a passage of the data. In vivo coding uses participants' own words, and this was used when a powerful word connection or metaphor was used by the participant. Values coding captures values, beliefs and attitudes, representing participants' perspective or world view (Saldana 2009). A specific CR analytical framework for the main study was designed after the scoping study was conducted, hence scoping study data became part of the main study description.

5.3 Results of the scoping study

This section explains how the data collected and analysed during the scoping study contributed to an understanding of the case. The sections below follow the scoping study contribution and criteria box presented in Figure 4 and address each of the criteria for the scoping study contribution.

5.3.1 Testing the data collection tools – the interviews

The interviews proved to be a good data collection instrument, even though it was challenging to arrange to conduct the interviews because of participants' time availability. Interviews with the Portal were conducted via Skype, which proved to be a good way of conducting the interviews as it allowed the researcher interview at a distance yet at the same time to see the participants. They are accustomed to online communication, therefore the interviews were smooth and participants talked freely. The interview with the University was conducted face-to-face. The interviews were recorded and transcribed, and the transcripts sent to participants.

Semi-structured interview schedules proved to be a useful instrument. They allowed the researcher to open the interview with neutral questions and let the participants express what they feel about the topic, but at the same time the researcher could make sure that all essential topics were covered. The scoping study interviews played an important role in testing the interview schedule, which was re-developed for the main study (Appendix 1).

5.3.2 Developing and testing the most appropriate analytical framework for the research

The CR analytical framework was developed during the scoping study. The aim of the research is to critically examine the university and promotional service relationship though the lens of CR philosophy. That means the researcher has to come back to the data, question them, contrast them with a number of different theories and look for the mechanisms that make the relationship the way it is. The literature (Bygstad & Munkvold, 2011; Danermark et al., 1997; Ryan et al., 2009) offers a specific analytical framework for CR studies. After the scoping study it was decided to adopt the CR analytical framework, which is presented in section 6.2.

5.3.3 Basic understanding of the University and the Portal and the communication structures between the Portal and the University

The scoping study became a part of the main study, therefore findings are further described and discussed in the main case study description (chapter 7). This section is a brief description of the understanding developed during the scoping study.

The scoping study revealed that there is a mediating Agency between the University and the Portal (Figure 7). The University uses this Agency to locate and deal with media such as the Portal. Therefore, for the main study it was necessary to study the relationship of all three actors: the University, the Agency and the Portal. This is a complex relationship that offers rich data to answer the research questions, and studying this case in depth enabled the researcher to use CR analysis to reflect on the data and look for underlying causal mechanisms.

Figure 6. Relationship between the University and the Portal as assumed before the scoping study

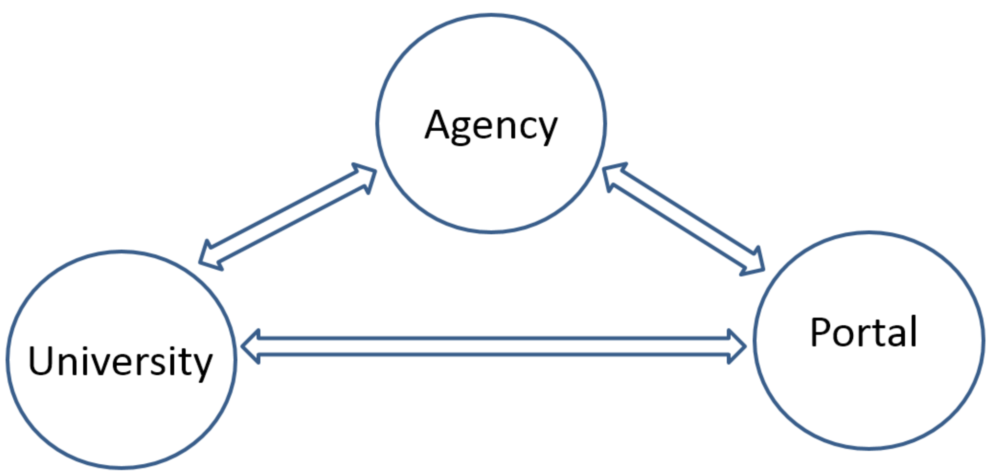

Figure 7. Relationship between the University, the Portal and the Agency

5.3.4 Scoping study findings relating to the University

The interview with the University revealed that the mediating Agency is important to the University's marketing activities. The Agency also mediates the relationship between the University and the Portal. The University decided through a tender process to use it to outsource media booking and it is responsible for bookings, closing deals and communicating with suppliers, for example the Portal. The Agency also advises on how to advertise through specific media channels.

The scoping study consisted of an interview with the University MO, who said that the University started to use the Agency and the Portal for the following reasons:

- Expertise
- Bulk-booking discounts
- The University's preference for outsourcing.

The reason why the MO uses the Portal is:

- Exposure of the University in a certain region.

Expertise

The Agency has worked in marketing for HE for more than 15 years and promotes a number of institutions. It therefore has valuable expertise and is expected to advise the University on what works and what does not.

Bulk-booking discounts

The other reason for using a mediating Agency is that the University believed that, because it works with the entire University, the Agency would be able to collate similar requests to similar suppliers to obtain discounts. However, this did not happen because the Agency is not able to gather together similar requests from faculties.

The preference for outsourcing

Another important reason for using the Agency (and other outsourced promotional services) is that the University prefers to outsource from external suppliers rather than to employ new staff. It seems that this might be for two reasons. The first reason is financial. The University has undergone a number of resources cuts and employing new staff is expensive. However, it is not clear whether this level of outsourcing is financially beneficial to the University. The other reason is the expertise in media booking that the Agency possesses because of working with many similar clients.

Exposure of the University in a certain region

The University participant mentioned that the reason for using the Portal is the exposure in a particular region that the participant's faculty can achieve. Such exposure helps to bring more traffic to the University's website. The University then measures the traffic from the Portal, but not the conversion from the traffic to enrolment. The participant should like to measure the conversion, but does not have a customer relationship management (CRM) system in place.

5.3.5 Scoping study findings relating to the Portal

After analysing the interviews with the director and the business development representative of the Portal, five main codes capturing the development and function of the Portal were identified:

- Changes in legislation and universities' approach to marketing
- Internal motivation of Portal funders
- Students' interest in studying abroad
- Universities' interest in recruiting more international students.

Changes in legislation & universities approach to marketing

For the Portal, recent legislation on students' mobility plays a crucial role. The Portal believes that policies on students' mobility has led to universities increasingly developing study programmes for international students, which has increased the need for students to find and to compare study options.

Another change mentioned by the Portal participants was decreasing public funding to universities and increasing tuition fees. The Portal believes that this caused a drop in students' numbers that 'kick-started' the market for the Portal. In order to 'survive', universities have to look actively for international students. Also, the Portal business representative thinks that home students are now more open to moving to go to university; before, they were applying to local institutions.

The Portal also perceives that the requirements of universities' marketing has changed. In the 'good times' (four, five and six years ago) a marketing campaign was successful if it brought many leads to the university (students clicking on the University website); what happened with the students afterwards was not relevant. Now, concepts such as impact, conversion and results are important. Most universities, however, do not know how to measure the impact of marketing campaigns. The Portal believes that the best way is to look at the cost of the campaign, the number of leads and the number of recruits, but thinks that there is a gap in universities' internal communication. The marketing department is often disconnected from the admission office. The Portal offers detailed reports on student traffic and tries to help universities to measure the conversion.

Internal motivation of the Portal funders

The Portal was founded by students who experienced an information gap when finding international courses and started the Portal as a student association. However, in 2008 interest from universities grew significantly and in 2009 the Portal professionalised and became a private enterprise.

Students' interest in studying abroad

The Portal believes that students are motivated to study abroad. Students also often ask the Portal about international study programmes and scholarships, 'because in an on-going globalised world more and more students see the need and the joy of an international part of their study' (P/D).

Universities' interest in recruiting more international students

The Portal listens to what students say, what universities want and, if there is a match, tries to create a product to satisfy the need. The Portal says that universities have a strong interest in recruiting more international students onto their programmes 'for the quality of university, for the diversity of the classroom, for the quality of research'.

5.3.6 Scoping study findings relating to the relationship between the University and the Portal

Two codes about the nature of the relationship between the Portal and the University were identified during the scoping study:

- Complex relationship
- Marketing versus education values.

Complex relationship

The central point of the relationship is the Agency. Even though the University is also directly in touch with the Portal, payments and most communication goes through the Agency.

The University usually contacts the Agency first and it closes the deal with the Portal. However, the Portal tries to be in touch with as many contacts from the University as possible in order to understand their specific objectives, 'which might be less corporate than the Agency reports'.

The University has a direct relationship with the Agency. It is UK-based but in a different city to the University so contact is therefore electronic, by phone or when the Agency representative makes a personal visit. The University participant is satisfied with its services because it saves time for MOs and because the Agency communicates with a number of suppliers for the University. However, the participant was expecting to obtain discounts as a result of bulk booking that did not happen. This was disappointing for the participant, who also thinks that the Agency is more reactive than proactive. For example, University MOs were expecting the Agency to give more information to the faculty on how their campaigns worked and what the rest of the University is doing. The Agency does this when the MO asks for it, but the officer would appreciate it if the Agency would feed them the information regularly. Personal meetings of the University and the Agency seem to be helpful, but the officer feels that these do not take place often enough although the officer does not have time to meet the Agency more often. Working by email and phone does not always result in mutual satisfaction.

Also, the officer says that sometimes various media contact the University directly. The University then sends them to the Agency, which is supposed to deal with these suppliers and then advise the University which supplier to use. The officer, however, thinks that the Agency does not always deal with suppliers who are sent to them.

The officer was satisfied with the services of the Portal. The Portal's main office is not in the UK, where it has only a branch office. The officer claims that the relationship between the Portal and the University is on a consultancy basis; it tries to give the University what it needs when it needs it. The Portal believes that the relationship with the University is friendly, cooperative and personal. Its director says, 'after all we also need universities, without them we are an empty platform'.

5.3.7 Identifying initial components with have causal powers

One of the aims of the scoping study was to identify initial components with causal power. This, however, was a difficult task in view of the limited amount of collected information. Nevertheless, after the scoping study it seemed to be clear that the issues discussed in the literature review play a significant role in University–Promotional services interaction. The theme of **decreased public funding to universities** and **universities adopting business-like techniques** is strongly present in the data. Universities have to impose targets on student numbers and are looking for new markets. Outsourcing promotional services helps universities with the marketing intelligence necessary to compete in the HE market. Outsourcing Promotional services supposedly saves the University's financial resources.

The process of collecting and analysing the scoping study data helped to develop a way of researching values. A specific approach was constructed that captures participants' values but does not steer the answers towards specific way of thinking.

5.4 How values can be researched

One of the aims of the scoping study was to develop a system for researching values. In the scoping study it was difficult to understand the values of the participating organisations. Participants often used contradictory sentences that created the feeling that they held both education and market values.

> *U/MO1:* *So yes, it's not necessarily marketing being like 'this' and not fitting in education. Education is changing and marketing is changing with it. Perhaps becoming more business-like. But it hasn't certainly been like that before.*

U/MO1: *The whole culture is changing and as a result the appreciation of marketing effort is greater. I personally think it's sad, because of course this is the place where we come to obtain knowledge, and develop, and widen our horizons, and all this.*

P/D: *That universities use us for promotion, fine great, that's how we finance ourselves, but the first instance we are study choice portal.*

A specific way of researching values therefore needed to be established. It was decided to use a version of the Echo approach (Cunningham, 2001) to understand the values. In the Echo approach the researcher listens to individuals of interest, and learns their language and viewpoints in order to echo their voices. The approach usually consists of interviews (individual and group), observations and questionnaires. Interviews are analysed by thematic analysis (themes are identified by research participants) or by content analysis (undertaken by the researcher). Echo can be used in both quantitative and qualitative studies (Cunningham, 2001).

It is not possible for this research to let the participants theme the data, because they are not in one location and their availability is very limited. Content analysis is also inappropriate because of the nature of the interview data (participants are talking about values not only when they answer the Echo designed research questions but at any time during the interview).

Designing interview questions that help to identify participants' values is the main contribution of the Echo approach, which uses a number of open- and close-ended questions. Respondents are asked, for example, what they think is a good way of working and what they think is a bad way of working, what they like and dislike, or agree and disagree with. Each question can be followed by questions asking for examples of events illustrating the other extreme, for instance what is the most, least, last, toughest or worst? Each may be followed by a series of probes (Cunningham, 2001). The Echo-like questions for this research are:

- What do you think marketing communications for HE ideally stands for?

- What do you think is bad practice in marketing communications for HE?

- Why do you work with this particular university/agency/portal?

- Could you give some examples of things that the relationship (university-promotional service) does that you find helpful to you in your job?

- Could you give some examples of things that this relationship does that you find not so helpful to you in your job?

These questions are incorporated into the interview schedule of the main study (Appendix 1). The issues identified in the scoping study are further addressed, developed and analysed during the main study data collection and analysis. The scoping study helped the researcher to understand the basic attributes of the University-Agency-Portal interaction, which then led to creating an elaborate design of the main study.

6. Outline of the main study

The scoping study uncovered the basic structure of the University–Promotional services relationship, and the main study then aimed at investigating the relationship in depth, drawing on the data collected during the scoping study.

Further interviews were conducted with the Portal. The Agency was contacted and interviews with Agency's team who work with the University were conducted. Also, further interviews with University users of the Agency and the Portal were conducted. Users of these services are spread across the University (faculties' MOs and centrally based Corporate Services).

6.1 Main study administration

Data from the Portal were collected via Skype. The director of the Portal was contacted for a follow-up interview and a new business representative for the UK market was interviewed. Interviews with the performance director of the Agency, the account director, the account manager and digital executive were conducted personally. The interviews with the account executive and the initial interview with the account director of the Agency were conducted by phone. Interviews with the University were conducted personally, including the interview with the Contract Coordinator (CC) between the Agency and the University, the PR manager, the strategic marketing manager, the head of communication, the international office representative, the HR representative, the marketing manager and five MOs (Figure 8).

Key:
P/D – Portal - Director
P/BD – Portal - Business Development representative
P/BD2 – Portal - second Business Development representative
U/MO – University – Faculty Marketing Officer (1, 2, 3, 4 & 5)
U/CC – University – Corporate department – Contract Coordinator
U/DI – University – Corporate department – Director of the International Office
U/HR – University – Corporate department - Human Resources
U/HCC – University – Corporate department – Head of Corporate Communication
U/HSM – University – Corporate department – Head of Strategic Marketing
U/MRM – University – Corporate department – Media Relations Manager
U/SMM – University – Faculty – Senior Marketing Manager
A/AD – Agency – Account Director
A/D – Agency – Digital Representative
A/AM – Agency – Account Manager
A/PD – Agency – Performance Director
A/AEx – Agency – Account Executive

						U/HCC			
						U/DI	U/HR		
						U/HSM	U/MO 4 & 5		
						U/MRM	A/D		
						U/SMM	A/AM		
						U/MO 2 & 3	A/PD		
				U/CC		P/BD2	A/AEx		
Interviewee	P/D	P/BD	U/MO1	A/AD		P/D follow up	A/AD follow up		U/CC follow up
Date	Sep-12	Oct-12	Nov-12	Dec-12	…	May-13	Jun-13	…	Oct-13

Figure 8. Main study interview timeline

The experience of conducting the main study interviews was positive because, unlike the scoping study, recruiting participants and arranging interviews involved no time problems. This might be because the initial interviews had already been conducted, so participants were motivated by the research process and the amount of collected data. The personal interviews were conducted in the participant's office, in a common business space or in a room booked for the interview. There was an issue with one participant who thought we could conduct the interview in a communal kitchen. After 20 minutes the interview was disturbed by other people and recording had to be stopped. The researcher then made handwritten notes. The interview was transcribed and the notes were logged into a memo.

In total 23 interviews were conducted (including the three interviews conducted during the scoping study). The interviews with the Portal and the University were usually between 40–50 minutes long. The interviews with the Agency were about 30-40 min long (mainly because of the availability of the participants).

The experience of the personal, phone and Skype interviews may be contrasted. The phone interviews were the most difficult in terms of understanding and communicating with participants. Without seeing the participant and without the participant seeing the researcher, it was difficult to establish contact and trust. The participants did not elaborate their answers as much as they did when interviews were conducted personally or by Skype. Skype interviews proved to work well. It was possible to see participants and react to their body language, which perhaps increased their trust.

Interviews were transcribed immediately after each meeting and the transcript sent to the participant. The aim was for the participant to check that the transcript represented a correct account of the interview and that the participant was happy for the researcher to work with this data. Most were happy with the transcripts. One participant added a sentence at the end to ensure data were not published without the participant knowing – this is related and discussed in the section on ethical considerations – and another corrected expressions used during the interviews, which did not affect the content of the interview.

6.2 Main study data analysis approach – CR analytical framework

There are numerous approaches to qualitative data analysis, for example critical discourse analysis (Wodak, 2001), content analysis (Krippendorff, 2004), grounded theory (Goulding, 2005) or narrative analysis (Riessman, 1993). The choice of analytical approach for a case study research project depends on its overall research design and research objectives (Thomas, 2011). This research adopts CR design and CR analytical framework. The reason why it is used as the main analytical tool is because it best fits the epistemology of critical realism and directly uses the tools of abduction and retroduction to identify causal mechanisms.

The CR analytical framework presented here is based on the model of exploratory research framework for CR data analysis (Danermark et al. 1997, p. 10). As mentioned in section 4.2.2, this consists of: description, analytical resolution, abduction/theoretical re-description, retroduction, comparison between different theories and abstractions, concretisation and contextualisation. The model is used because it helpfully guides the researcher through all essential stages of the CR research. Other researchers recommend and use Danermark's (1997) framework. For example, Ryan et al. (2009) and Bygstad and Munkwold (2011) used the framework and mentioned a degree of overlap between the stages. Therefore the research framework effectively reduces all six stages into the following four steps:

1. Case description, description of objects and events, identification of components which have causal powers

In the first stage, the case description is produced. The case description is drawn from conducted interviews. Interviews are first coded and categorised in NVivo then themes are identified in the data. At this stage special attention is paid to the initial identification of the objects, events, and components with causal power. Thematic analysis (Braun & Clarke, 2006) is used to generate initial themes and develop a case study description. Thematic analysis is discussed in section 6.2.1.

2. Theoretical re-description (abduction)

At this stage the theoretical framework is used to explain the data. The framework is built from primary theories: the IMP Interaction theory and the theories of market and education values; and secondary theories: the theory of agency–client relationship, the Marketing Mix, the economic market mechanisms and outsourcing. These theories are contrasted with the data. The reason for such theoretical re-description is to understand the case from a number of different angles, critically engaging with the data and widening the explanatory potential of the study.

3. Retroduction and identification of candidate mechanisms

At this stage the researcher looks at different data sources, for example the websites of the Portal, the Agency and the University or their strategic plans. At this stage the researcher also identifies the theory with the greatest explanatory power, or which combination of theories works best (Danermark et al., 1997). Three retroduction strategies may be used. First, the researcher may look at the data and ask 'What is fundamentally constitutive for the structures and relations (X) highlighted in Stage 1 and 2? How X is possible? What properties must exist for X to be what X is? What causal mechanisms are related to X?'. Second, a counterfactual thinking strategy may be applied, based on understanding 'what something is in relation to what it is not'. And third, the social and thought experiment may be explored. A social thought experiment is based on asking or answering questions in an unexpected way (Danermark et al., 1997, p. 101).

4. Context–Mechanism–Outcome

At this stage the researcher looks back at the initially identified causal mechanisms and examines how 'different structures and mechanisms manifest themselves in concrete situations' (Danermark et al., 1997, p. 110). Some identified mechanisms might result in different outcome when in a different context: 'There is thus always a continuous interaction between causal powers embedded in deeper structures and changing empirical contingencies' (Yeung, 1997).

Thematic analysis and a number of coding techniques are incorporated into the first stage of the analytical framework. The next section discusses the use of thematic analysis and coding for in this research project.

6.2.1 Coding and thematic analysis

A **code** is a 'short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data' (Saldana, 2009). A number of coding techniques were used during the analysis. First, the initial coding framework was designed, based mainly on structural coding. This categorises data according to a specific research question (Saldana, 2009). The research questions are:

1. What characterises the interaction between the University and Promotional services?
2. Is context important for understanding the relationship between the University and Promotional services and does this comply with the IMP Interaction theory?
3. Are the values of the University and Promotional services aligned?
    3.1. What are the values of the University and do they conform to the theory of education and market values?
    3.2. What are the values of the Promotional services and do they conform to the theory of education and market values?

The initial coding framework helped to find a basic structure in the interview data. The initial coding framework consisted of seven main codes:

1. Outcomes of the University–Promotional services interaction
2. Context of the University–Promotional service interaction
3. University values
4. Promotional service values
5. First draft of the candidate mechanisms
6. Emergent codes
7. 'Unhelpful'

A number of descriptive codes were subsequently created during coding. The new codes were assigned to the main codes as subcodes.

The following paragraphs provide the characteristics and justification for each of the initial codes:

1. Outcomes of the University–Promotional services interaction

Characteristics: This code captured participants' feelings about the University–Promotional service interaction: expectation versus current situation, characteristics of the interaction, the atmosphere of the interaction, characteristics of the service exchange (financial, social aspect) and the power/dependence relationship.

Rationale: This overarching code related to Research Questions 1 and 3 because it aimed to describe the main characteristics of the University–Promotional service and interaction and at the same time to capture the outcomes of the C + M = O formula.

2. Context of the University–Promotional services interaction

Characteristics: This main code captured how participants talked about the environment and how the environment affected their work and the relationship between the University and the Promotional services. This included the market structure and the changes experienced by participants.

Rationale: This main code related to Research Question 2 because it captured the context of the University.

3. University values

Characteristics: This structural code captured the values, beliefs and attitudes of the University participants.

Rationale: This code related to Research Question 3. It captured some important characteristics of the object (the University) and so helped with identification of candidate mechanisms.

4. Promotional service values

Characteristics: This code captured the values, beliefs and attitudes of the Promotional services participants.

Rationale: This code related to Research Question 3. It also captured some important characteristics of the object (the Promotional services), and therefore helped with identification of the candidate mechanisms.

5. First draft of the candidate mechanisms

Characteristics: This main code captured the characteristics of the objects (the University and the Promotional services) and the main reasons why the interaction between them is the way it is.

Rationale: This main code helped to identify the main characteristics of the CR formula (M + C = O).

6. Emergent codes

Characteristics: Data were coded under 'emerging codes' if they did not fit under codes 1–5 yet were important to understanding the case. New codes were created here only if the information had a strong impact on the research findings.

Rationale: This code was needed for data that did not relate to any research question, yet were important for understanding the University–Promotional services interaction.

7. Unhelpful

Characteristics: Information was stored here if it seemingly related neither to the research questions nor helped in explaining the M + C = O formula,.
Rationale: Participants sometimes talked ‘off the topic’, yet it was helpful to keep this information for possible future reference.

Analytical memos were taken throughout the analytical process. Analytical memos reflected on how the researcher personally related to the participants or the phenomenon, how emergent codes were created, what patterns could be seen in the data, what surprised the researcher and what were the problems and ethical dilemmas with the study (Saldana, p. 34). The researcher came back to the analytical memos during thematic analysis.

Thematic analysis is incorporated into the analytical framework because it helpfully complements the CR framework by finding the essence of the text. **Thematic analysis** allowed themes to emerge from the data (Saldana, 2009) therefore, even though the research had a preliminary framework for coding, there was nothing by way of a preliminary framework for themes.

Thematic analysis was a useful tool for describing the case. The literature offers helpful definitions of what might be considered a theme: ‘an outcome of coding, categorising and analytic reflection, not something that is, in itself coded’ (Saldana, 2009, p. 13), ‘a theme is an abstract entity that brings meaning and identity to a recurrent [patterned] experience and its variant manifestations. As such, a theme captures and unifies the nature of basis of the experience into a meaningful whole’ (DeSantis & Ugarriza, p. 362, in Saldana), and a ‘theme is the form of capturing phenomenon one tries to understand’ (van Manen 1990, p. 87, in Saldana). The theory was helpful, however the practical experience of developing the themes was more challenging than expected.

6.2.2 The actual experience with data analysis

The above sections explained the theoretical approach to data analysis. This section reflects on the researcher’s actual experience with data analysis. After data were transcribed, the researcher used the initial coding framework to code the interviews in NVivo. NVivo proved to be a useful tool for the initial coding of the data. The initial coding framework proved to be well elaborated, because it helpfully captured the main messages in the interviews and at the same time helped to relate the interview transcripts to specific research questions. There were a number of emergent codes. The original plan was to categorise these under the main code, ‘emergent codes’, but they always related in some way to the main codes. Therefore it was better to categorise emergent codes under specific main codes, because they helped to capture the characteristics of the main codes (the final coding framework may be found in Appendix 2). The code ‘unhelpful’ was used only sporadically, because most of the interview data were relevant to the research questions.

Coding was part of the first steps of the CR analytical framework, consisting of developing the case description, describing objects and events, and identifying components with causal powers. After the interview transcripts were coded, themes needed to be developed. This proved to be a challenging task and it was difficult to move from codes to themes. Wolcott (2009) recommends imagining the research participants as actors and the research context as a scene. The themes then introduce and describe the play. This interesting strategy, however, did not help the researcher to develop the themes, because it applied yet another level of abstraction. The best strategy for theme development was to try to explain the main essence of the interview data to a critical friend. Talking to someone who does not know anything about the research meant that the researcher had to formulate a narrative to capture the interview data best. This narrative then transformed into themes. However, the process was complicated and time consuming. NVivo was not helpful for theme creation because the data were in folders and flipping between folders and viewing the data from a distance was difficult. At this stage all codes were in hard copy. The researcher kept re-reading the data, manually highlighting the important or interesting parts, manually rewriting those parts and slowly putting together themes that captured the interviews best. The themes are presented in the following chapter (chapter 7 – Case study description).

The other three steps of the CR analytical framework merged into one substantial process. Contrary to what the CR analytical framework suggests, the process started with retroduction and identification of candidate mechanisms rather than the theoretical re-description (abduction). That was because only after the initial M+C=O attributes were identified was it possible to see the structure in the data and the answers to the research questions. A preliminary list of Mechanisms, Contexts and Outcomes was developed after the case study description (section 7.8). Once this was identified, the researcher could write the discussion chapter. Here research questions were answered, further retroduction analysis was undertaken and data were contrasted with theories (theoretical re-description). Documents such as the strategic document of the University, the campaign budget schedule of the Agency and the websites of the University and the Promotional service were used at this stage to strengthen the explanatory power of the study. The documents were not analysed by thematic analysis. The CR framework allows the researcher to use documents in a supportive fashion similar to the use of resources in a literature review. From the three retroduction strategies identified by the literature as useful strategies for the study, two were used to deconstruct the data. The main strategy asked 'What is fundamentally constitutive for the structures and relations (X) highlighted in Stages 1 and 2? How is X possible? What properties must exist for X to be what X is? What causal mechanisms are related to X?' (Danermark et al., 1997, p. 101). The strategy of social and thought experiment was also used, for example the participants were asked to say in their own words what is 'marketing for HE'. It was assumed that the participants were not often asked such a question and its unexpectedness motivated them to formulate their own ideas about their work, which then enabled the researcher to contrast such ideas with the literature. Analytical memos were used to support the retroduction and abduction strategies. After the abduction and retroduction steps were implemented, the final CR explanation was drawn from the analysis and the list final of Contexts + Mechanisms = Outcomes was developed (section 9.4).

Chapter 7 represents the first analytical step – Case study description, where the main themes were discussed. The following chapter (chapter 8) represents the second and third analytical steps (theoretical re-description, retroduction and identification of candidate mechanisms). The fourth step, the Context-Mechanism-Outcome analysis, has been developed in two stages. The first was developed after the case study description and the second, re-developed version was finalised and is presented after the discussion section.

7. Findings and the case study description

Case study description is the first step of the CR analytical framework. The case description is drawn from conducted interviews and its purpose is to present the data in a direct form and to identify the CR objects, events and components with causal powers. This attributes will help to build the initial CR Mechanism + Context = Outcome explanation. This chapter, therefore, does not discuss the findings; the discussion is developed in chapters 8 and 9.

The case description captures the research participants' views on the relationship between the University and the Promotional services. All information presented in this section is based on the interviews, and data are presented in the form of quotes or a narrative. In order to maintain the flow of the case description the data are not always presented as 'participants say...', however all the case study descriptions are concerned with participants' views.

The case study uses pseudonyms for the participants (Figure 9). 'The Promotional services' stands for the Portal and Agency participants. 'The University' consists of the Marketing Officers or MOs and Corporate Services. If a generic term is used (e.g. the University, the Promotional services) it means the participants of the University or both Promotional services. When the whole University as an organisation (not only the participants) is referred to, this is clearly indicated.

The Portal's participants
P/D - Director
P/BD – Business Development representative
P/BD2 – second Business Development representative

The Agency's participants
A/AD – Account Director
A/D – Digital Representative
A/AM – Account Manager
A/PD – Performance Director
A/AEx – Account Executive

The University's participants
a) Faculty level
U/MO – Marketing Officer (1, 2, 3, 4 & 5)
U/SMM – Senior Marketing Manager
b) Corporate level
U/CC – Contract Coordinator
U/DI – Director of the International Office
U/HR – Human Resources
U/HCC – Head of Corporate Communication
U/HSM – Head of Strategic Marketing
U/MRM – Media Relations Manager

Figure 9. Research participants – structure and pseudonyms

Seven themes were identified. Each describes an important aspect of University–Promotional services interaction.

7.1 Theme 1: Playing the game of opportunities and survival

> *You got to play the game and if you don't then you have no reason that you have to survive. If countries can fall, economies can fall, big brands can fall so can universities. U/SMM*

Summary of theme

This theme captures participants' perceptions of the context of HE. All University and the Promotional services participants perceive that there has never been as much change in the HE environment as has taken place during the past few years. This causes fear and anxiety for the University because it finds itself in an environment where suddenly it has to compete for survival.

> *U/HSM:* *It's stopping being it's enough students for everyone, we are actually having to fight for market share.*

At the same time the changes represent an opportunity for the Promotional services; they are busier, because in universities there is a growing interest in using advertising. The changes in the environment were described as: increased tuition fees, changes in recruitment rules, visa restrictions and increasing competition.

Increased tuition fees

The government cuts imposed on HE and the subsequent increase in undergraduate tuition fees is the most often mentioned change that influences the University and the Promotional services. There is a perception that, now when undergraduate students have to pay £9000 a year, the University participants need to work much harder to attract students to come to study at their institution and to convince them that their money is well invested. It is believed that students judge value for money in terms of ranking, the quality of academics and employability after graduation.

U/HSM: *So we already know from research that we are doing, they are looking for the Russell Group, they are looking for the people who are top in the league tables, so basically they are looking for value for money. For their £9000 and it is the more premier league universities that they would obviously wanting to go to, because they equate that with employability afterwards.*

Another problem relating to the increase of tuition fees is that some countries around the world have not always correctly understood the message about the increase of tuition fees. In some countries the media reported a threefold increase of all tuition fees, leading to misinformation (the University had to communicate the correct message).

U/DI: *Now a lot of international countries thought that that international student fees would go up threefold. That wasn't the case, it had obviously no effect at all on international fees, so there was that misinformation or misrepresentation in countries that we had to deal with and we sent out messages and had to deal with that itself.*

Changes in recruitment rules

Changes in recruitment rules is another factor that influences the University and which needs to be considered by the University and the Promotional services when creating a marketing campaign. In 2012 there was a cap on student numbers apart from AAB students, and in 2013 this changed to ABB students. How A-levels were scored also changed in 2012, resulting in fewer students obtaining grades high enough to apply for specific degrees.

U/MO4: *There was a sort of different policies that were brought in last year and there was a cap on how many people you could take that have certain grades and that kind of again sort of squashed the amount of people that they were out there.*

Visa restrictions

Visa restrictions are part of the changes that influence the HE market. They are perceived as a barrier to international student recruitment (by both the marketing officers and the international office). The government altered the conditions of the post-study work visa, and international students are now counted in immigration figures:

> *U/DI:* *The government says they are up for business, but not in actual fact have taken away the post-study work visa, we are adding in you know, international students are still being counted in terms of the net migration figures for the country, when actually, there is prove that over 90, 95 whatever 98 per cent of students come, stay for visa, do it, go home, get a good job hopefully, they don't stick around.*

Changing demographical structure

Among other external factors influencing recruitment, demographic changes were mentioned by the Corporate Services of the University. It is believed that 'naturally demographic is going down until 2020' [sic] (U/HSM), which has an impact on the number of students applying to universities.

Increasing national and international competition

Universities compete for students and promotional services compete for universities. There are a number of promotional services in the UK and internationally. The Portal works with over twenty agencies in the UK and the Agency uses thousands of media (UK and international), of which the Portal is one.

The University knows that it is not the only HEI to recognise that, because of the changes in the environment, it has to work harder to attract sufficient students of high quality. The University therefore perceives increased competition nationally and internationally, with an increasing number of universities from all around the world making concerted efforts to climb the league tables:

U/MRM: *There was less pressure than now. And even more so it’s not so much what other national competitors are doing, it's what is Nan Yang technological university doing in Singapore. Because they suddenly jumped 50 places or 30 places ahead of us in the league table, the world league table, and we are thinking, they are fairly new university, how could they do that?*

The University is facing up to these challenges in a number of ways, including increased national and international promotion (e.g. study fairs, agents, visits, internet marketing, publicity), starting Massive Open Online Courses (MOOCs) and opening campuses and lecturing overseas.

The focus is on both national marketing activities and international recruitment. International students were already paying high fees before the fees increase of 2012. The University is keen to have a significant percentage of international students and international marketing strategies are supported by substantial budgets. European marketing and international marketing budgets are different – the European marketing budget is smaller. One reason for this is that in the past there was a clear difference between tuition fees for EU and international students, with EU undergraduate students (as well as UK undergraduate students) paying a third of the international fees. Now, however, the tuition fees for UK and EU undergraduates are much closer to the fees of international students (both UK and European undergraduate students pay £9000). Moreover, it is becoming more difficult to attract UK students. One participant therefore suggested that the thinking is therefore starting to shift:

U/MO1: *Getting an EU student is going to be much more attractive than it used to be in the past.*

The Portal, on the other hand, has observed an increased interest by UK students in studying abroad, looking for cheaper education in Europe.

The environmental changes have had a major impact on how the University and the Promotional services work. Some participants from the University and the Promotional services, however, think that despite the changes in the HE environment there is a certain level of stability in higher education. And even though the University as well as the Promotional services say that HE is a business now and a market, most participants also realise that it is not a 'hard business environment', as in the commercial world. There is, however, a feeling that this is changing and further changes towards business thinking are needed.

7.2 Theme 2: Changing the culture, changing marketing

> *The culture is changing and I don't think there is a return to the old idealistic times possible. U/O*

Summary of theme

This theme captures how the changing context influences the work of the participants. The University's as well as the Promotional service's participants identified what was characteristic of HE marketing in the past and now, in the present. The features identified by the Agency relate to a general trend by HEIs to use marketing techniques more often and more strategically than before. Those identified by the Portal relate mainly to internet marketing. And the aspects identified by the University relate to numerous changes within the organisation that have resulted in the University as a whole and the marketing departments being more business-like.

The theme also presents the feelings of the University's and the Promotional service's participants towards these changes.

Changes identified by the Promotional services

The Agency has observed that universities have become **more strategic in their use of marketing.** The Agency believes that this results from increased understanding of marketing as well of students' decision making. The Agency perceives that in the past there was no strategic thinking and no creative brand thinking. Programmes were often advertised in a simple listing (e.g. in a newspaper or brochure, programmes were simply enumerated; no pictures, no brand design or creative text was used). The Agency took an active role in encouraging universities to think strategically and as the Agency's Performing Director mentioned, to ensure that the 'right messages are put in front of the right people in the right media channel'. The Agency itself undertakes market research in order to understand the student journey.

> *A/PD:* *The work that we do is trying to understand what the emotional mind-set for those students is as well so that we can tailor our messaging and tailor our advertising to reach them.*

The Agency participants also perceives that universities **advertise much more** now than in the past and even universities such as Oxford and Cambridge now take part in the clearing process, which was never the case in the past. Competition for top students has increased and some universities will poach and give students £1000 to come to their institution instead of another.

The Portal operates across countries, therefore they can see the changes in using **internet marketing** in one country and compare different regions. For example some Eastern European universities are only just starting online marketing of HE, whereas institutions in the UK are advanced users of such tools. This, however, varies. Some universities within a single country are sophisticated online tool users and others are not, and there is often a difference not only between universities but faculties. Some have their own programmers or experienced MOs able to develop and maintain online marketing campaigns, whereas others might not have this facility.

The Portal invests energy in educating universities about how to use web statistics to measure the effectiveness of campaigns. Once universities use web statistics they can see for themselves whether their campaigns bring traffic to their website or not. This can be beneficial for the Portal, because it can demonstrate that it is a good channel to invest in, but it may also mean that universities see that other channels are effective. In any case, the Portal advocates the use of web statistics because it believes that universities should invest effectively.

Changes identified by the University

The University participants identified a number of changes within both the organisation and the marketing function. In the past, for example, no targets were imposed on marketing departments; decisions about marketing expenses were made by committees and a series of approvals; people were undertaking marketing activities as part of their job, but no centralised managerial structure for MOs was in place; academics were less informed about what marketing could do and were less engaged in marketing activities; the messages the University was sending out were less direct than now; and there was no marketing or brand strategy.

This started to change in 2004/2005. At the same time a head of strategic marketing was appointed, marketing became centralised, and branding and marketing plans were produced to plan the delivery of the key business objectives of the University and its faculties.

> *U/HSM:* *When I got here, for example, I wanted to know about brand strategy for the University, I wasn't allowed to use the word brand, I was only allowed to use house style, so I then realised there was a lot of work I had to do.*

The head of strategic marketing believes that today, the University's marketing is much more strategic and data-driven than in the past, and the marketing culture and terminology is much more embedded in the institution. The University further aims to improve the data on which marketing decisions are based; measuring and analysing are top priorities for the University marketing. Many departments can now measure for themselves the traffic that comes to their web pages, and others buy the statistics from the Agency. The data show where the traffic comes from and what visitors are looking for. The Promotional services, however, strongly advocate measuring not only the traffic and impressions ('impression' in marketing terms means the number of times an advertisement is seen in the media) but their conversion into enrolled students. At the moment the University measures conversion on some campaigns only, and not from impression to enrolled student but from impression or click through ('click through' is when the audience not only sees the advertisement online but clicks on it and arrives at the advertiser's website) to certain actions, for instance registration for an open day or requesting a brochure. The University does not have a system to follow the complete student journey (the University calls it the CRM system – customer relation management system). It is difficult to measure the conversion from interested to enrolled because the marketing and admission systems of the University are often not interlinked. The Portal director commented on this trend and explained that only a few of their 'best' clients are able to measure the conversion to enrolled students:

> *P/D:* *Our best clients, our best universities we work most intensively can track exactly how many enrolled students they get out of our campaigns. Well exactly, of course there is a lot.... we create lot more value that is not trackable.*

Even though the University cannot measure the link between marketing activity and enrolled students, it invests resources in campaigns known as 'conversion campaigns'. These include more frequent and more personalised communication with potential students, answering queries about the University, supporting students and motivating them in their decision to come to study at the University.

Another difference between the past and current states of marketing for HE is the imposition of steep targets for the number and the quality of students. Both the Agency and the University occasionally used the phrase 'bums on seats' when talking about student numbers. The target student numbers are not only the responsibility of the MOs but of the academics and the University as a whole. For some MOs, the actual enrolment numbers are what drives their work, yet one participant does not feel that enrolment should be directly linked to the work of a marketing person. This is mainly because marketing usually has no input into creating the study programmes, so there is a feeling of not wanting to be personally responsible for some else's work.

Another specific observation relating to targets is that, even though the University is target-driven, the perception of one participant is that the staff are not driven by financial targets. This participant feels that this makes a difference because, when people are driven by financial targets, these might become more important than the needs of the students. The participant had observed this practice in other universities, especially private universities. The participant says that some private providers that are commission-based push their programmes hard, even if the institution is not the best choice for the student. The participant says that it is important to do the best for the student, therefore if they see that the University is not the best choice for the student it is better to say 'No, this is not right for you':

> U/DI: *If I felt that personally I mis-sold it to see that student to come, it's time for me to walk away.*

Two other participants also commented on **aggressive marketing campaigns** at other universities. The participants did not use the word 'aggressive' when talking about their own marketing practice, but said that the University is now more direct in its marketing communication.

> U/HCC: *And we are sometimes, that's the thing that has changed, we are a bit more comfortable about being a little bit bolder.*

Feelings towards the changes

The culture of marketing for HE is changing dramatically. And the University participants feel that it has to take an active part in the competition by knowing the market well and being strategically and business-minded. Feelings towards this change are variable. Most participants are anxious about these changes, but are open to embracing the challenge and behaving in a more business-like fashion. For some participants, however, these changes are upsetting:

> U/MO1: *I personally think it's sad, because of course this is the place where we come to obtain knowledge, and develop, and widen our horizons, and all this. Nowadays, if we don't put our business hats on and it's not just in marketing but across the University, everywhere, and academics are exactly under the same type of pressure, then we may not exist soon.*

There is a mixture of altruistic and business values in the interviews, both from the University and the Promotional services. The University, for example, says that it strives to present correct information in order not to mislead the student, but marketing communication is dependent on the available budgets, and budgets are dependent on the relative financial value of certain markets (e.g. more money to promote to international students than to European students).

The Portal also considers it important to publish factually correct information. It has a team that regularly checks the information on the Portal. However, it is dependent on the information provided by the universities. The Portal also offers an additional service consisting of information provided directly by students. This enables other students to compare the official information from universities with the personal experiences of their students. The Portal originated in a student organisation and claims that the benefit to students is its priority:

> *P/BD:* *We don't push or promote anyone above anyone else, any university. Our mission is clear, to list all study programmes.*

On the other hand, the Portal is partially financed by advertisements that universities place on their website, and universities can choose from different types of paid profiles and banners believed to bring from five to nine times more traffic to their website.

The Agency also talks of the importance of communicating information that helps students to understand what it is like to study at a certain university and the value of education in general. Nevertheless, the Agency account director is also conscious about the fact that marketing can confuse students, because if a young person receives exciting promotional material they might become enthusiastic about the institution that sent them the material, even if it is not the best university for them. Nevertheless, such creative thinking is advocated, because it believes it works.

7.3 Theme 3: Marketing what?

> *Definitely, education is a different, very special type of product. You know very, like I said, very emotional, very high investment, and therefore it requires different marketing than hamburgers. P/D*

Summary of the theme

This theme captures three important concepts. First, it looks at what participants do in their marketing roles and in which direction they think their work should develop. Second, it captures participants' understanding of the product (HE) they market and, third, it describes the way they think their work influences education. This information is important because it helps in understanding the meaning of the terms/words from the participants' perspective.

Designing and promoting the product

The University as well as the Promotional services know that marketing of HE is complex and specific, as is the product being marketed. They are also conscious that marketing is not the only thing that influences students in their decision to come to a particular university. Many participants, however, think that this depends on how widely marketing is defined.

The basic Marketing Mix consists of product, price, place and promotion. At the moment the participants say that the work of marketing at the University consists mainly of promotion. The University marketing has limited influence over the product/programme design or the price or distribution and, when it comes to the content of advertisements, MOs are highly dependent on academics. Marketing has some input into market research to find out whether there is a need in the market for specific programmes and how they should be packaged (e.g. what titles should programmes have). However, the MOs say that even though marketing research is a requirement of the quality assurance process, it does not always happen. They feel that this often leads to launching programmes that cannot be promoted successfully. Marketing staff should prefer to be included in the process of designing programmes and believe that this should be based on market research. One participant also mentioned that marketing research can uncover not only what the market needs but what it does not yet know it wants and needs, so the development of the product for the future may be influenced.

U/SMM: *Marketing, it should be driven by customer insight, therefore we as an organisation are driven by what the market needs and wants and in fact doesn't know what it wants so we are there very much to begin* *influencing and developing product for the future so we can serve future generations, that's what I think marketing in HE should be about.*

Another participant mentioned that market orientation would not mean marketing ruling the institution, but the University using all possible data (customer insight data and external research) to make decisions about how the University should respond and develop.

U/MO5: There has been too much of you know the tail wagging the dog. If there is not a market out there, we need to test the market before we launch products.

The Promotional services also believe that market research should be in the forefront of course design. Meeting students'/customers' needs was mentioned by the University's and the Promotional service's participants as the main variable for understanding the market. The needs of society and economy were also mentioned during the interviews with both the University and the Promotional services:

U/SMM: The needs of the student ultimately match needs of society, because if you, you need to educate people to meet the needs of the society. But also I think the marketing can play a role in establishing, the society.

Defining the product

The participants perceive the product/HE programmes to be highly emotional for student because of its high financial, time and effort investment. The participants also recognise that HE is worth the effort, not only for the studied discipline but for the life experience. They believe that this is one of the reasons why education should be promoted and communicated to students in a comprehensive and exciting way. Participants often expressed that education is different from certain products:

P/D: Because education is not like Coca-Cola where the whole world can just consume one brand or two *brands or three brands so you really have to take a targeted approach to find the right target audience and not mass marketing.'*

The participants also believe that it is difficult to see the effectiveness of educational campaigns, because marketers cannot simply check the sales of the product before and after the campaign. It may take a long time for marketing campaigns to influence students' decisions and there are many other influences on their decision making. One participant mentioned that another difference between education and other industries is that education still has enough money to invest in marketing, whereas other industries had been more affected by the financial crisis. Yet another difference mentioned by a participant was the feeling towards the product:

U/MRM: *If you work for a bottle of water company, you may not live and breathe ethos of that company, because you are just making sure that the bottles are lined up and you work in a factory and you might get a few free bottles from time to time to take home. Working at the University is different. You are coming into a community that kind of lives and breathes on its own. It's interdependent on other organisations and institutions and the community. But it's got a life on its own. And it's different. It's just a completely different experience I have had working in that kind of organism than you would work, rather than just organisation, I think it's a living thing.*

Marketing's relationship towards education

When the University participants were asked about what they felt was the relationship between their work and students' education, they said that they influence the student mainly in the pre-student stage. They can influence students' choice of university by communicating through appropriate channels and using appropriate messages. However, apart from when they are writing or filming a current student profile, MOs do not communicate with current students. They think that it would be good if they completed the circle and had ongoing communication with students. The Corporate Services of the University is slightly different. It also communicates to prospective students, but on top of that it collects data about students' decision making processes and helps other departments of the University to communicate with students:

> *U/HSM:* *The way we influence is ensuring that you know prospective students or current students are getting the right information at the right time in the right way and it's relevant to them so that for example the student experience we are able to have a big impact on that around enrolment and welcome at the moment, because we are able to say, you know don't send out a million emails, don't format that like that. Don't do it like that, strip it back to this this and this. And this is what they need. So we are able to tailor the communications in a professional way that perhaps, you know the people doing student services or accommodation can't.*

The Portal also believes that it can influence students' choice of university. It believes that it is a positive influence because the information on the Portal is correct and that students can compare universities and programmes and become much better informed: 'better study choice leads to a better educational experience, less drop out, higher satisfaction'. The Agency also knows that it can influence students' choice, and believes that it is important to talk to students at an early age to spread the information and to make them aware of choices.

However, as mentioned earlier, because marketing in the University is mainly about promotion and has no influence over the product (apart from occasional market research or help with naming a course), participants feel that the University is not using marketing to its full potential.

7.4 Theme 4: Marketing in a big organisation. THE UNIVERSITY

> *In a big organisation you need to reflect the different aspects of that organisation, not everybody can be thinking about you know money, or you know, some people have to think about you know the support people needs so it's widely, you have this dispersal range of experience in organisation. U/CC*

Summary of theme

The University is a large organisation with a number of faculties and departments. This theme first explains how the participants feel their work fits into the University structure. The theme then explores the relationship between the marketing departments and academics. Academics and MOs must work together, but it can be challenging to find a common understanding of concepts and ways of working.

The place of marketing within the complex structure of the University

The University has a number of departments with very specific knowledge and responsibility (e.g. the international office, the marketing office, the HR department, the procurement office, faculties and schools). The University has a central marketing department and a central international office. Each faculty has a marketing office with a number of MOs who are interlinked with the central department through senior marketing managers. This complex structure means that MOs from one department often do not know what other departments are doing.

The strategic document and strategic mission of the University as a whole plays an important role in participants' understanding of the relationship between the marketing department and the wider University. Participants usually referred to the University strategy, which then informs faculties' business strategies and then feeds into marketing plans. It was mentioned, however, that the University strategy needs revising because at the moment the strategic aims and how to achieve them are 'a little bit woolly'.

The personal and professional aims of the participants usually relate to promoting what the University does, raising awareness, protecting the reputation, achieving faculties' goals, career progression and job satisfaction. The participants also mentioned that their aim is to make marketing more data-driven and the University more market-oriented.

MOs also feel that they have never worked as hard as they do now. This is not only related to the environmental changes but to the internal restructure and the cost-cutting exercise of the University that coincided with government cuts to universities' funding. As a result of the internal and external changes, the MOs found themselves in an unsettling situation. They feel overworked and believe that more MOs are needed:

> *U/MO1:* *Marketing plans and the needs of the faculty are much bigger than the current resource can cope with, so a fraction of them will be realised during the year and it will be meticulously prioritised because everything seems to be important and we are under pressure from all sorts of people within the faculty to deliver everything.*

In 2013 the University ran a programme to hire new marketing staff. This helped with some of the workload. It has not, however, entirely solved the issue of insufficient marketing staff. MOs feel that the University as an organisation prefers outsourcing to employing additional staff and it is believed that the University management considers it to be a way of saving financial resources, but not all MOs are convinced that outsourcing is always a cheaper and more effective way of doing the job.

> *U/MO1:* *The University view is that they are happy for us to outsource more and more work in variety of ways as long as we don't ask for more staff. There is money for outsourcing, but not for employing staff.*

The University's marketing department outsources a number of services: photographers, design agencies, copywriters, video producers, head-hunters, PR agencies, re-branding the Agency and agencies in different countries for international recruitment. The Agency is the main supplier for media bookings and the Portal is one of the channels the University uses to promote its programmes.

> *U/MO1:* *Of course design the Agency or a photography and things like that I don't necessarily thing this should be my job, but there is a drive to outsource so much at the moment, just to avoid employing extra people, that it becomes excessive.*

The relationship between marketers and academics

The interviews revealed that the work of marketing departments is highly dependent on academic staff. There is a clear appreciation of the work that academics are doing and MOs also perceive that academics often appreciate the marketing work, especially after 2012, when the University recruited significantly fewer students than in 2011. These 'missing students' caused a shock to the system, a 'wake-up call' not only for the marketing departments but the whole University. Academics are now asked to increase their commitment to open days, for example:

> *U/MO1:* *Academics also have the task of recruiting students, nowadays they are much more nervous and pressurised about what else I can do so my students come.*

The relationship between academics and marketers is often difficult. Even though there are cases of working well together with academics on a campaign, it often proves to be a challenge. It is believed that this is mainly because academics (including some members of the senior management) are not always open to marketing thinking and marketing terminology. They have a different mind-set and do not have a marketing background.

> *U/HSM:* *We seem to speak different language and it's very hard when we start using marketing terminology, I think people switch off, so that's quite a difficult one to get over, because whilst you want to talk to people in a way they understand, you also don't want to*

devalue marketing terminology and you want it to become embedded in the culture in the psyche.

One marketing officer said that marketing is still not considered as a strategic input, but as a 'we need a website, we need a brochure'. Problems also occur because marketing staff are reliant on academics, who have the knowledge of the programmes or the research, to give them correct information and to specify the aims of the programmes and the target audience for the programmes. Sometimes academics do not know who should be the target group for the programme or do not have a budget sufficient to produce the campaign, or both. Marketing staff then feel that they cannot produce an effective campaign and money and effort are wasted. They also feel that it is difficult to advise academics because they will not change their mind, anyway.

U/SMM: *You can't, and this is where we have the issue in this organisation, you still can't get them to change their minds.*

Moreover, as mentioned above, the programmes are usually designed by academics and brought to MOs to be promoted. This is frustrating for the MOs, because they feel that marketing can do much more than that and they should like to be involved in the market research and in designing the programmes.

U/MO4: *I think it would be really beneficial because we could then you know work on creating something that is actually needed in the market as opposed to something that someone decided you know, just before they gone to bed, oh that's a good idea let's do that.*

One participant from the Corporate Services said that the development of new programmes excludes marketing, not because of the different world view of marketing and academic staff but simply because it is the practice of the University and that there is potential to change this.

Different issues arise when academics do marketing work without consulting MOs. For example, sometimes academics book media and place an advertisement. This might happen because they simply decide to do it, or because media persistently contact academics for as long as they know they will book advertising space with them. This is a problem because the University regulations state that media may be booked only through the Agency. One reason is that the University cannot pay the media directly because they are not in the University procurement system. One participant, describing the issue, said that when academics book the advertising directly with media the marketing office finds out quite late about this and then quickly needs to produce a design for the advertising and communicate with the Agency to arrange payment. MOs think that such incidents often happen not because academics wish to abandon the University procedure or fail to communicate with MOs, but because they do not know what is needed.

> *U/CC:* *Because it's not familiar to them, it's not what they normally do, and obviously a lot of academics you know they work in a way where they think, 'I want to know about this one so I am gonna do it, and that's fine because that's how the academic world works, but professional services you know for the University as a whole it does it in a better way.*

From the interviews it follows that the conditions for producing a good campaign and working well together are: good communication with academics, a clear target group for the programme, an adequate budget to produce the campaign, a good understanding of the product and established ways of measuring the effect of the campaign. Successful campaigns like this have been produced. However, marketing staff believe that more can be done if the marketing input is greater.

7.5 Theme 5: THE PROMOTIONAL SERVICES: Giving universities what they need when they need it

> *Our job is to make sure that we are giving them what they need when they need it. P/BD*

Summary of theme

This theme captures the similarities and differences between how the Portal and the Agency think about their work with clients and students. This relates to the general attitude towards clients, measuring the effectiveness of campaigns, the importance of marketing and the way to approach students.

Similarities

The structure of the Promotional services is less complex than the structure of the University. This is reflected in the united aims and vision of what the organisation stands for and how this can be achieved. The Agency team that takes care of the University consists of five people. The Portal has a specialist team focused on the UK and another region, consisting of four people. Even though the Portal and the Agency are different services, they are similar in their aim of working well with the client and their passion for the business. The account manager of the Agency expressed the feeling that 'whatever the client's aims are, that's our aims as well'. The Portal also strives to have good relationships with universities and, as the business developer says, to offer 'solutions to their problems'.

Both the Agency and the Portal consider that measuring the effectiveness of universities' campaigns is very important. The Agency participants and especially the digital account coordinator advocate the use of Google products (Google Analytics and Double Click) to track and measure the effectiveness of campaigns, not only click through but the long-term behaviour of the online customer. Some universities, however, have no system to carry out such measurements. The University, for example, can measure online visits and click through but not the long-term behaviour of customers. The Promotional services advocate measuring the conversion from campaign to enrolment, but at the moment there is nothing in place to provide such data. The Portal has its own software to measure the effectiveness of their campaigns and at some universities there is a system to track how many enrolled students are achieved by a campaign on the Portal. The Portal also motivates universities to use Google Analytics to be able themselves to measure the value they derive from the Portal.

Both services also believe in the importance of marketing for HE, not only in the sense of promotion but in the wider sense, relating to market research and influencing the University product in order to meet the needs of the students, the economy and society. The Agency undertakes market research for some universities, and for the University it carried out media research in an international market (identifying media to use in that market). The Agency also uses the personal experiences of its staff to advise universities where and how to advertise. It can give universities an idea of what other universities are doing (although the names of institutions are kept anonymous) and it also undertakes a research projects to study students' decision-making processes. The Portal uses its website metrics to advice agencies and universities of possible markets for their offer and the best form of advertising on the Portal. Both services encourage universities to be more strategic and to use data when deciding on their marketing campaigns.

Both the Promotional services also perceive the value of raising the importance of their services in the HE market. They feel that universities' investment in marketing is increasing and that budgets for promotion are more accessible. The Promotional services believe that universities in general should invest more in marketing activity and make marketing more strategic, otherwise as the Agency's performance director says 'they are gonna lose massive revenue'. There is also a shared agreement on the importance of understanding marketing and using it for the benefit of the institution. The Agency's performance director, for example, warned that there is a 'danger that academics will still see marketing as a dirty word', and not recognise the strategic importance of marketing for the institution.

Differences

There are numerous differences between the ways in which the Portal and the Agency work. There are essential differences in the nature of the service they offer (the Agency is a mediating agency for the University; it only looks for suitable media through which to advertise and it books the media, while the Portal is one of a number of different media channels). Other differences are presented in the following theme (Theme 6: Living in a complex relationship), where the relationship between the three organisations is described. In this theme one specific difference between the Promotional services may be captured. This is the different relationships of the Promotional services towards students. The Agency's relationship is on the level of market research relating to understanding the student journey. This helps them to recognise when people make decisions, in what emotional mind-set students are, when and how they come to which media to look for what information, when they interact and when they enrol. On the other hand, the nature of the Portal allows a view of online statistics to understand students' decision making and furthermore offers students a space on the website to express their opinions about universities and university life and thus help other students when choosing where to study. The idea is that this will help students to compare the official information from universities with personal experiences of peer students. The staff of the Portal also talk to students about their international study choices and funding options. The Portal says that students are at the centre of their attention and that they help to match the right student with the right institution.

> *P/D:* *Our first priority lies always with the student. That universities use us for promotion, fine great, that's how we finance ourselves, but the first instance we are study choice the Portal. And because of that philosophy I think we are also so successful. Serve students best to get the visitors and only with visitors you are of interest to the university.*

The Portal offers priced profiles and advertisements and also a simpler, free service for universities to list information about their programmes. It uses data from accreditation agencies and national agencies to complement information about universities and programmes.

> *P/BD:* *It's no use just having four universities listed on their... we need to list everybody so they can have the best choice. So by doing that we are getting more universities on there its self-fulfilling thing, the more universities, the more programmes we have the more students are gonna come to us and the more students we get, the more universities wanna come to us.'*

7.6 Theme 6: Living in a complex relationship

> *Out of all the clients I have personally work on, it's one of the most kind of complex account because there is just so many people that we do deal with, but it's also one of the most rewarding to work with. A/AEx*

Summary of theme

Each participant has specific experiences and perceptions of the interaction between the University, the Portal and the Agency. These perceptions are sometimes complementary and help to build a consistent account of the relationship; however, there are occasions when the experiences or opinions differ. In order to capture the voices of all organisations, this section explores each organisation's perception of the interaction.

Portal's perceptions of the relationship with the University and the Agency

In the interviews with the Portal, a strong belief was apparent in the importance of personal relationships with universities, helping the Portal to understand the specific needs of faculties. This also helps universities to better understand the products the Portal is offering.

> *P/BD:* *The reason why we want to go also to a hmm, to have a relationship with the University because sometimes they have different objectives as well. It's not so corporate, it's very much, we have got a new programme or we really need to promote this now , and that's why we sort of have to have both relationships.*

The Portal participants were conscious that universities do not always want to have personal contact with the media because they might be fully occupied. However, some MOs prefer direct contact with the media. The Portal has two specific contacts at the University. The first was established through the international office, before the University started to use the Agency. The second was established thanks to a media day organised by the Agency, when a couple of media concerns including the Portal had the chance to visit the University.

However, even though there is some direct contact with the University, the Portal always lets the Agency know about any arrangements with the University. The Portal appreciates the work of the Agency, because the Agency acts as a bridge between the Portal and universities that helps it to reach them. Since the Portal is relatively new in the UK market, not many universities know about its existence, so for the Portal it is therefore beneficial to work with agencies that serve many clients. Once agencies recognise the Portal as a worthwhile channel, they start recommending it to their client universities.

On the other hand, one more channel between the Portal and universities sometimes makes things harder, because communication becomes complex. There are different points of contact, it takes longer than direct communication and it might become confusing if there is an urgent matter and the point of contact is not available. Also the Portal feels that it has good growth potential in the UK market because a high proportion of UK students use the service, but a much smaller proportion of universities use it. That is why the Portal feels the need to work well with the Agency, to help it with everything it needs, to visit personally, to help with data collection (e.g. identifying target markets) to show how much better than other media it is in terms of analysis and so prove that it is a worthwhile and effective channel.

The Portal considers the Agency to be one of the largest and most professional agencies when it comes to HE marketing in the UK. It believes that the Agency makes the University's life easier, because it share its knowledge of the market, helping choose the right channels but also taking responsibility for the choice and so decreasing the risk.

Agency's perceptions of the relationship with the Portal and the University

The Portal is one of the thousands of media that the Agency uses. The Agency says that the Portal works well and that it appreciates the fact that the Portal charges per click through, not per impression, creating the feeling of money well invested. An interesting point is that, even though the Portal aims to target students worldwide, the Agency uses the Portal mainly to target the students of one region. One of the reasons is that the Agency feels that when the Portal started it was much more regionally oriented and, even though now it has expanded, the Portal still performs well in that region. There are other media that would be prioritised for UK students or for students from areas other than the Portal's region (UK media for UK students and, for other students, international media or media that translate their pages to different languages and target different countries and cultures). The Agency also believes that the Portal receives a higher Google ranking in one particular region than in other parts of the world.

Both the Portal and the Agency believe that communication is an important aspect of the relationship. However, the interviews revealed rather different perceptions on some issues. For example, the Agency describes the effectiveness measuring system of the Portal differently from the Portal. The Agency feels that there is a problem with the Portal as well as with other media because as the Agency's digital coordinator says 'stats for them is the last thing they care about' and the priority is to sell the space*. S*ometimes when the Agency communicates with the Portal or other media it speaks to a salesperson who knows how to sell the product but does not necessarily know about technical issues. The problem with measurement is that the Portal uses its own software to measure the traffic on the website. This software, however, sometimes does not allow the Agency to measure the effectiveness in the way it wants. The Portal's system allows the Agency to see the statistics for themselves. This is a helpful service not offered by other media, but the Agency cannot work with the system the way it wants because the system only allows viewing monthly reports, unhelpful for clients running campaigns on an alternative timing basis.

The account that the Agency operates for the University is extremely active. Anyone in the University may use the Agency to book media. Usually marketing staff, international office and the HR department do the booking, however academics may also use the services of the Agency. That means that the Agency may be contacted by ten people in a single morning, although it does not have ten people to deal with the requests. To deal with the workload and to make sure that someone always picks up the University's emails, the Agency operates a group email. This system works well when used properly, but sometimes University staff do not use the group email but have one-to-one conversations, which can cause problems in the event that someone else has to take over the case. Also the campaign budgets of the University are stratified.

They come in any time of the year, in any amount, from any department. For the Agency this makes the account one of the most complex, challenging and demanding that they operate. Other universities and businesses usually have more centralised budgets and communication. The Agency tries to centralise the way the University works by introducing templates for its briefs and by visiting the University ('surgery' sessions – people may come and ask anything; if people do not come it is difficult for them to understand how the Agency works). However, because of the complex nature of the University, it has proved to be challenging to centralise communication. Also the University has never used an agency before. In the past MOs booked advertising directly with the media whenever they wanted and it seems to be difficult to change the habit. The Agency says that money could be saved if advertisement requests were more centralised and planned, but there are cases when this is not possible, for example when programmes are approved late. In the end the Agency is happy to do whatever suits the University.

The Agency perceives the University as being more cautious than some other clients when it comes to media booking; the University looks for more rationale behind its chosen media.

The Agency recognises that in the relationship with the University both parties have to work together. They have to listen to each other and learn. When the Agency started to work with the University it felt that work was more difficult, because they did not know each other. The University did not know what to expect from the Agency and the Agency did not know how complex the University is. The Agency, however, feels that the relationship has developed and the understanding is much better now. It has a good relationship with everyone and staff personally meet almost everyone they work with. Also, at the beginning of the contract between the University and the Agency there was no stable team for the University, which may have been unsettling for the University:

> *A/AM:* *But actually we have been full team now for a year and a half and kind it's kind of we developed our relationship with them, we kind of understand each other, I think we, especially from like the Corporate side they understand a lot more what they are trying*

> *to achieve and what they need which means the relationship between us is much you know it's really good because you know we are on the same page if you know what I mean.*

Interaction with the Corporate Services part of the University is different from interaction with faculties. Also, each faculty is different, and not only each faculty – each MO is unique and has a different way of working. Not everyone asks for effectiveness reports, for example. The Agency encourages everyone to ask for these, because it believes the University should have the data and not only from the media. ‘The media will tell us that works fantastic, but we need to check that that’s correct’. The Agency perceives a varied approach to the question of data measuring within the University. Corporate Services, for instance, is working hard to capture the data (using Google Analytics and buying metrics from the Agency). The Agency believes that people who are marketing-focused understand how important measuring is, but people from backgrounds other than marketing do not push for it.

The Agency participants say that they regularly inform the whole University marketing department what is happening in the HE market and advise the University what other clients (similar to the University) are doing. The aim of such communication is to help the University to become more proactive in advertising and to carry out advertising all year, not only when immediate recruitment is needed. The Agency thinks that there is still potential for the University to promote itself to students, because students’ awareness of the University is low.

University’s perceptions of the relationship with the Agency

The University’s perspective on the relationship with the Agency is as stratified as the structure of the organisation. The fragmented nature of the University also means that only after half of the interviews were conducted an important underlying reasons for using the Agency was discovered - the EU regulations on public institution spending. The University had to run a public tender and consider a number of options such as specific agencies for undergraduate and postgraduate recruitment or an agency that could serve all markets. The key criterion was the level of service versus the cost, and the Agency presented the best offer. Other reasons why the University uses the Agency are: help communicating with media, obtaining discounts from media and the expertise of the Agency.

The Agency is able to do all the work for the University when it comes to communicating with the media. The University provides the Agency with a brief for a campaign that states the aims of the campaign and budget, then the Agency looks for the best media channels to use and negotiates the price. The University perceives that this is a great help, as the Agency can advise and compare media and because in the past media were in contact every day trying to sell space on their channels. This ‘cold calling’ was extremely time consuming, so having the Agency saves ‘time and trouble’. However, at the same time some MOs feel that there is extensive outsourcing, which means that MOs need to coordinate the work with photographers, designers or/and copy writers and the Agency. This, too, can be time consuming and perhaps ‘some of those things that would be much easier done in-house’. Some MOs prefer to deal directly with the media and only ask the Agency to close the deal. This is because they feel that they have always done it this way, they can get first-hand information from the media and can negotiate a good price. Also, even though the University feels that there are benefits to using the Agency to coordinate the work with the media, it also means that the University loses its relationship with the media. This makes the University less informed about specific media and dependent on the Agency to provide information.

Another reason for using the Agency, that of obtaining discounts from media services, also proved controversial. There are varying opinions on this aspect of the relationship with the Agency and the issue will be discussed in Theme 7 – Financial (mis)understandings. The only aspect that may be commented on here is the University’s expectation of bulk discounts. It had been expected that the Agency would pull together the inquiries from the University’s departments when booking certain media in order to obtain a more generous discount. This, however, did not happen and some MOs are not sure why. Corporate Services is conscious of possible reasons and says that the Agency cannot secure such discounts alone. It needs help from the University in coordinating the inquiries, but the University is not ready to do this at the moment.

Another important reason for using the Agency is its expertise in the field of HE marketing. The Agency works with over twenty client HEIs and has over fifteen years' experience in the HE field. It can therefore advise on the channels for specific campaigns and share its experience regarding what is happening in the field of marketing for HE to keep the University up to date with developments in technology and trends in advertising. The University participants' experience of this service varies. Some of the MOs as well as the Corporate Services participants appreciate it and say that the Agency is able to produce a good media schedule and recommend innovative channels. One of the MOs, however, mentioned that the Agency may advise on innovative channels but often the decision on whether to use certain media rests on the faculties' budget. Other MOs mentioned that the recommendations of the Agency are rather standardised:

> *U/MO3:* *Generally I wouldn't say that any of the suggestions that they have put forward had been light bulb discoveries that we hadn't already identified ourselves and perhaps that's one of the areas that we are little bit disappointed with the Agency, we perhaps had expectations that they would put forward suggestions that we haven't previously considered.*

Some marketing staff from the University feel that they need to push the Agency to submit more creative ideas. They feel that it is more reactive than proactive and sometimes merely fulfilling the directives of the University instead of being forthcoming in response to the University's inquiries, informing it about possible advertising opportunities and what is happening in the field of HE marketing. In order to receive these updates, the University asked the Agency to produce a report with an overview of the market from the Agency's perspective. However, as with other issues, some marketing staff say they receive the report and it is helpful, while others say that maybe the Agency does send out the report but not to them, as they never receive it.

In general, there seems to be a better relationship and understanding between the Corporate Services of the University and the Agency than between the MOs and the Agency. One participant from Corporate Services, for example, expressed the feeling that even though the Agency is a commercial business and it wants to make money, there is an impression that it is not all about money; it is also about being helpful and understanding the needs of the University from inside. On the other hand, on a similar topic a participant representing the link between the Corporate Services department and the faculties said that, because the Agency is commercial, its tender bids are usually overpriced when it submits a media schedule. This participant, however, said that it is normal for a commercial business and that the participant would do the same. Another MO expressed the opinion that the Agency is a busy private company therefore it focuses on contacts that make more bookings. One of the reasons for such contradictory opinions is the different nature of the communication between the Agency and Corporate Services, and the Agency and the MOs.

Corporate Services meets the Agency more often, has more regular contact to book advertisements, has a better understanding of the contract between the University and the Agency, and understands better how the Agency works and how to work together. Because of its bigger budgets, it has no problem paying for the analytical services of the Agency. Corporate marketing staff therefore say that the Agency is friendly and approachable, and is willing to meet the University. They have regular meetings and they know people well personally. There are, however, participants who feel that they could derive much benefit from meeting the Agency, and know that the Agency comes to visit the University, but they have never seen it because of time restrictions. Communication via email or phone is not always the best solution to the problem. Because it has a better informed relationship with the Agency, Corporate Services also understands that working well together is a two-way educational process of getting to know each other. It is also conscious that the University is a demanding client and, because it did not previously use an agency, it was not ‘terribly educated as a client’. It knows that it needs to learn how to brief the Agency, because sometimes it does not explain well what it is trying to achieve. Corporate Services feels that during the three years of working with the Agency it has learned how to work together, believing that the University is now a better educated client, and that the Agency has also adjusted its procedures to work well with the University (e.g. the team size and stable account management). However, the same understanding has not been achieved with the faculties. When asked about the development of the relationship, one MOs carefully replied: 'the relationship has developed in a variable way'. And one senior marketing manager, who links the faculties to Corporate Services, said:

> *U/SMM:* *I also still haven't worked out with the Agency whether we are small client that they don't serve particularly well, because the service isn't always great, or whether we are too big client and they can't cope with us.*

This seems to relate to the expectations of the MOs, especially at the start, when the University first began to use the Agency. Again, MOs varied in their response. One opinion is that it is difficult to move from everybody booking directly with the media to using the Agency to make the bookings. Another opinion is that this is not too difficult and has been thoroughly communicated to the MOs but not to the academics, therefore there are occasional problems when academics book advertisements directly with media. Yet another opinion is that it was not well communicated to the MOs, because they were told that the Agency could provide more services than it actually does, so the expectations and subsequent disappointment were greater.

> *U/MO3:* *I have been pitched that they can do a whole lot more. But as I said having not seen the contract I don't know what agreement they have got in writing for our partnership. So as I say yes, compare to what I am being told, there is a level of expectation that they should be doing lots of the research for us, they should be coming up with proposed campaigns that would meet our objectives, and without, unless you really push hard, they are not forthcoming with that information.*

Participants from Corporate Services as well as from marketing departments, for example, identified a number of occasions when cooperation with the Agency was good. It was able to provide sound advice quickly and to help with often challenging campaigns. The Agency was also helpful in establishing new contacts with media and managing tight deadlines and budgets. Negative experiences were more specific and resulted from the expectations of the MOs or from specific occasions when the Agency recommended certain media that did not work or when the communication between the University, the Agency and media was difficult. Such experiences shape the opinion of the participants; they become more doubtful about the recommendations of the Agency and question the recommendation. Also the changes in the HE environment made people more anxious and more careful about what the Agency provides.

University's perceptions of the relationship with the Portal

The Portal displays free of charge a number of University programmes as part of its initiative to list information about as many programmes as possible. Only two participants from the University actually book paid advertising with the Portal. The participants who use it say that they do so to get better exposure in a specific region. They believe that the Portal is the leader in that region. These participants are highly satisfied with its services and say that it is forthcoming and willing.

> *U/MO3:* *So far I have been very impressed with them actually. I have been impressed with the level of data that they can provide, the reports that they send you, they are quite proactive and they don't wait for us to contact them for different things, they are forthcoming with information, and very willing.*

Participants from the University who do not use the Portal usually have some knowledge about it and understand that it aims to attract students worldwide, but they think that it is predominantly focused on one region and appears higher on search engines in that region than worldwide. The reason why they do not use Portal varies. Some claim that there are so many portals out there and budgets are small, so the Portal is not a priority because it is not a 'major player' in certain target markets; others say simply that the Portal has never approached them.

7.7 Theme 7. Financial (mis)understandings

> *But in my view the Agency are meant to get… they do get a discount but the Agency must charge us for that and I don't know what per… that's never been explained and never been broken down to me. And if I was in a private sector, I would really look at it but I am in a public sector and I have I am quite far down in the food chain. U/O5*

Summary of theme

This theme talks about the how participants understand the financial flow between the organisations. This is an important factor because perceptions of financial efficiency influence overall perceptions of the relationship. Because of the significant differences between participants' opinions and conceptions, the data are presented in Table 1 to allow comparison of the different opinions. The theme concludes with diagrams demonstrating the different issues related to financial flows.

Generally about finances

The University's understanding of financial flow and financial benefits is disparate. None of the MOs knew how exactly the flow works, and some of the MOs were speculating. The information on the financial flow from the Agency and the Portal is clearer, however the difference between 'commission', 'sale', 'rebate' and 'discount' is not clear. These words are often used as if they had the same meaning.

In general, the MOs are more doubtful about the financial benefits of using the Agency than the Corporate Services of the University. There seems to be problems in obtaining discounts and reporting the efficiency of campaigns. The MOs were expecting to be eligible for bulk discounts but feel as though they are not receiving them, and that the discounts in general are small. Some of the MOs prefer to negotiate the price with media directly, but then have to buy the media through the Agency and this, as they say, sometimes adds 'commission' to the booking price. The Corporate Services of the University prefers MOs to negotiate with the Agency, not with the media. Also, there is an extra cost for obtaining effectiveness statistics from the Agency, so some faculties and some participants from Corporate Services prefer doing the analytics themselves. The Agency believes that its prices are always discounted and that it offers good value to the University. Media usually give ‘agency commission’ but not ‘direct client commission’. One participant from the University said that the Agency’s billing system is good, because it does not involve disputes over price. The participant added, however, that this is probably because the University does not even try to negotiate.

Because of the disparity of the data, the description of the findings is presented in Table 1. Each row of each table represents one opinion. First the University’s understanding of the financial flow is presented. As with other responses of the University, a difference between the opinions of the Corporate Services team and MOs may be perceived.

Table 1. Opinions on the financial flow between University, the Agency and

MO's opinion on the financial flows between the University and the Agency
We receive no bulk discounts
We perhaps receive discounts
We pay commission in every booking
MOs were told that the Agency adds no commission, but that is not true
We pay administration fee whenever we use the Agency
There is additional cost for metrics reporting
We pay certain rate every month + specific activities
Not sure if it is financially beneficial to use the Agency, discounts are small. Sometimes we can get better deal without the Agency.
MOs have not been explained how financial flow works
There is not enough hard data to judge the value for money (but value for money is not only in saving but additional benefits as advice, expertise)
The Corporate's opinion on the financial flow between the University and the Agency
The Agency is cheaper than going directly to media
There has been savings
We receive bulk discounts
We pay no fees when the Agency visits
The contract did not include metrics, so that is an additional unanticipated cost
Corporately there has been value for money
We pay no management fee
The Agency gets media discounts with comes back to us
The Agency does discounts but this is offset by the cost of consultations, preparation, fees (not sure if financially beneficial for the University)
The Agency's opinion on the financial flow between the University the Agency and media
The University is a different client from others, because budgets and communication is stratified
Stratified budgets & communication make bulk discounts difficult
All media offer agency commission but not direct client commission
The Agency always buys media cheaper, then we pass money back to client = media commission (e.g. if 10% media rebate, then 2% of the Agency commission goes back to the University)
The Agency doesn't think that reporting/metrics is expensive (circa 5% of campaign budget or less), the Agency thinks that reports are flexible
The Portal on the financial flows between the University, the Agency and media
Commission between the Agency and the Portal does not affect the University. If campaign £5000, the University pays always £5000, but if the Agency is in the middle, the Portal receives less

After the interviews were conducted and this variety of opinions on financial flow was revealed, Figures 10 and 11 were drawn to represent the situation.

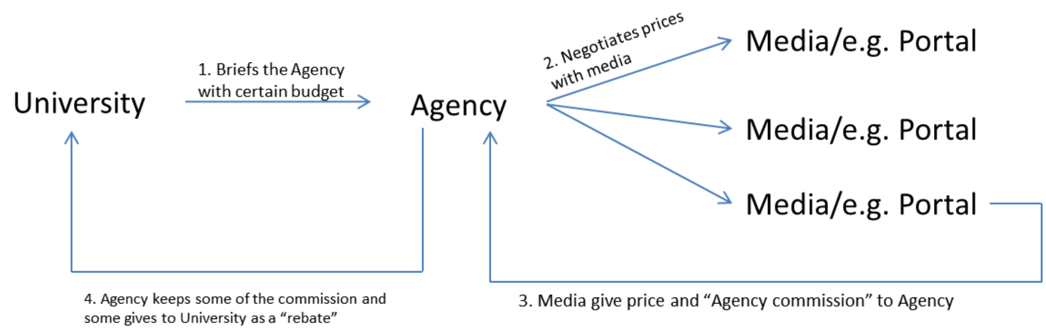

Figure 10. Financial flow – how supported by the Corporate Services of the University

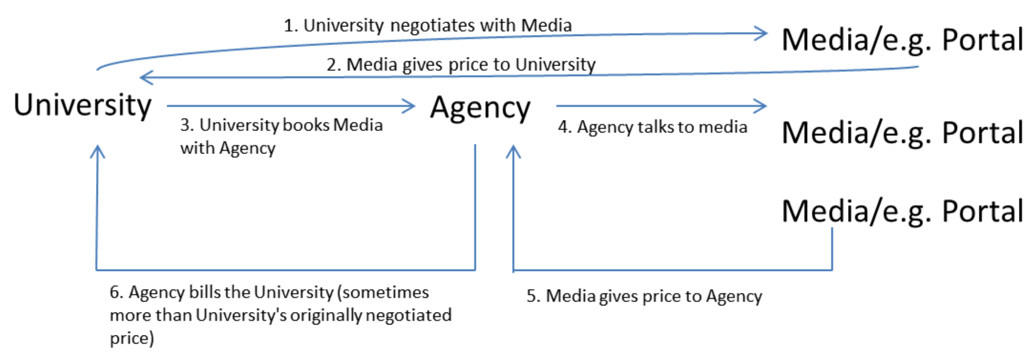

Figure 11. Financial flow when MOs or academics contact media directly

Because of these disparate answers, an additional interview was conducted with the University coordinator of the contract between the University and the Agency (CC). The aim was to seek a clearer understanding of how flows are supposed to work. First the CC was asked about how the financial flow should operate and how 'sale', 'rebate', 'discount' or 'commission' work. Then these two diagrams were presented to the CC in order to understand the CC's opinion of the varied ways of working and understanding within the institution. Finally, the financial value of working with the Agency was discussed.

The CC confirmed that the first diagram shows how the flows should work. When the Agency recommends channels to the University it may push the budgets to show the University the range of available choices. The University then decides which media it wants to buy, then raises the purchase order and the Agency books the advertising with the chosen media. The University is responsible for the artwork to be sent to the Agency. Sometimes, for example when deadlines are tight or the University needs to be in touch with the media, a three-way conversation might take place. CC believes that the Agency normally negotiates a better rate with the media than the University could achieve, and the University then receives a rebate on that rate from the Agency. Some media do not offer discounts to the Agency.

> *U/CC:* *The discount would be the discount that the Agency negotiates with the supplier, so if they are selling something for £100 they may say look we booked £10,000 for advertising with you last year, you should give us some money of that and they will say yes, you can have it for £70. So that would be the discount price. But then the Agency would give us a rebate on that.*

The CC believed that the University does not pay any commission or agency fee, but the CC was not sure about the specific financial arrangements. The CC was also unsure of the percentage of the rebate.

Looking at the second diagram, the CC pointed out that the University should not negotiate rates directly with media and that it is not usual for the University to negotiate a better price than the Agency. None of the media suppliers is set up in the University accountancy system, CC observed, another reason why booking always needs to go through the Agency.

It was difficult for the CC to say whether savings were made by employing the Agency. The main reason is that the University cannot compare how much it spent before using the Agency and how much it spends now, because it is not comparing 'like with like'. The University now advertises far more than it used to. It can only look at the savings relating to individual jobs, because when the Agency sends the media schedule the original price is listed against the rebated price that the University pays. Also, for the University it is time consuming to deal with suppliers and the negotiation of prices involves a time cost, therefore CC believes there have been savings.

The financial flow, as supported by the Corporate Services of the University (after CC follow-up interview), is shown in diagrammatic form in Figure 12:

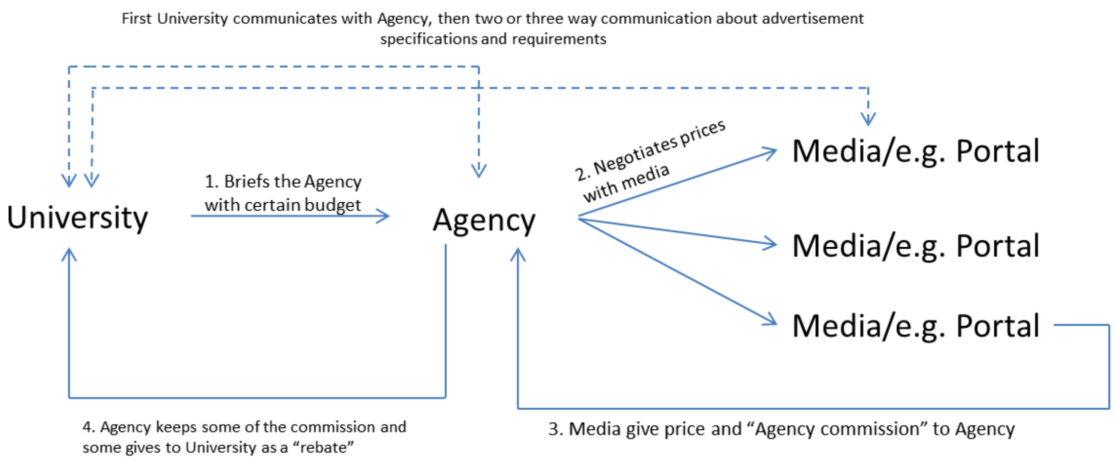

Figure 12. Financial flow supported by the Corporate Services of the University (after CC follow-up interview)

7.8 Preliminary CR explanation: Mechanisms, Context and Outcomes

The main purpose of the case study description was to identify the initial Mechanism + Context = Outcome (M + C = O) attributes. These attributes were identified by looking for the fundamentally constitutive structures of the relationship between the University and the Promotional services. The M + C = O attributes characterise the relationship, the cause of these characteristics and in what context these mechanisms result in such specific outcomes. A retroduction strategy, asking what is fundamentally constitutive of the structures and relations highlighted in the case study description (Danermark et al., 1997, p. 101), was used to identify these mechanisms. Context is represented by the macro-environment influencers and outcomes capture the main characteristics of the relationship. Attributes are grouped into thematic segments and mechanisms are grouped according to the institution (e.g. University = U) and theme/mechanism number. For example, the first preliminary Mechanism relating to the University is called UM1. Context and

Outcomes are simply numbered, that is, for instance, C1 and O1. These M + C = O attributes are part of the analytical processes. They are only preliminary indicators of the CR explanation. They will be further refined and explained during and after the abduction and retroduction analysis (chapters 8 & 9).

Table 2. Preliminary Mechanisms relating to the University

	Mechanisms
University	**UM1 Promoting more, working harder**
	Marketing = promotion. The University does more marketing activities now than ever before, but marketing still not considered as a strategic imput. Marketing has little input in market research, marketing believes that market research should be in forefront.
	Now it is common to impose steep targets on number and quality of students' recruitment (the University meassures visits/click through, the University would like to measure conversion).
	The University believes that it needs to be even more business-like and strategic.
	Some participants are anxious about changes, but open to embrace it; some participants are sad about the changing culture.
	UM2 Complexity and stratification
	The University is a complex Russell group institution.
	The University is stratified. There are many departments. The Corporate department and faculties have different marketing budgets & marketing plans. Corporate sees the Agency more often, has bigger budgets, can pay for statistics. Some faculties find Agency’s statistics expensive and slow.
	Marketing personnel is dependent on academics (academics now asked to do more marketing, academics designing the product, different mind-set, different language)
	UM3 Internal changes
	Internal restructure (first less MO, then recruiting more MOs, but still not enough).
	Cost cutting exercise.
	The University's general preference of outsourcing before employing; some MOs feel like outsourcing is too excessive.
	UM4 Expectations and experiences
	The University has never used an agency before, but now after 3 years they are more experienced.
	In the past MOs directly booking with media.
	Different oppinions on the transition from not using an agency to using the Agency (well communicated, smooth; well communicated to MOs but not academics; not well communicated, expectations too high)
	Reporting statistics was not incorporated in the contract.
	Single experience can alter the University's oppinion about the Agency (e.g. successful, unsuccessful campaign)
	UM5 Perception of the Agency's value for money
	Nobody in the University knows for sure if using the Agency is financially beneficial.
	Different use of terms such as ‘commission, rebate, sale, agency fees’.
	UM6 Limited knowledge and use of the Portal
	Only two MOs use the Portal (they say that the Portal is proactive and delivers good statistics)
	The Portal puts up profiles for free without the University knowing.
	Most of the University participants think that the Portal is focused on promotion to one region.
	Participants who are not using the Portal say that there are many portals out there and the Portal is not a major player, or the Portal has never approached them.

Table 3. Preliminary Mechanisms relating to the Agency

	Mechanisms
Agency	**AM1 Want to work well with client**
	Passion for business
	Working to centralise communication - group email, brief templates, 'surgery' visits.
	AM2 Marketing and market research should be in forefront
	Marketing is important for universities, universities increased investment into marketing but should invest more.
	Measuring is important (use of Google products), marketing focused people understand the importance of marketing.
	Marketing research to measure needs of students is important.
	AM3 Value for money
	The Agency prices are always discounted.
	Media give an agency commission.
	AM4 Experience and understanding of the Portal
	The Agency believes that the Portal works best in one region, and receives higher Google ranking in that region.
	The Agency experienced difficulties with obtaining statistics from the Portal (and other media). Often there is a contact with sales person, not digital person.
	AM5 The team of the Agency
	There are 5 people in the Agency's team for the University, but many people from the University can contact the Agency, sometimes in the same time.
	The team size and team members were changing during the 3 years.

Table 4. Preliminary Mechanisms relating to the Portal

Mechanisms	
Portal	**PM1 Marketing and market research should be in the forefront**
	Market research can measure the needs of students, but also economy and society.
	The Portal educates universities about internet marketing (Google analytics). The Portal uses their own analytical system.
	The Portal thinks that Universities have increased investment into marketing, but should invest more.
	PM2 Specific relationship to students
	The Portal is built from student associations. The Portal wants to help student to make good choices.
	The Portal is financed both via governmental funding and via universities placing advertisements.
	PM3 Relationship to the Agency and universities
	The Portal considers the Agency to be helpful. The Agency is one of the biggest and most professional agencies for HE in the UK. The Agency makes universities life easier (share knowledge and risk).
	Relationships with universities are important for the Portal.
	The Portal wants to work well with the Agency, help with everything (e.g. statistics), visit personally, show how much better they are in terms of analysis. The Portal feels that they have a growth potential in the UK market.

Table 5. Preliminary Context of the CR explanation

Context
C1 Increased tuition fees (public cuts to teaching and research)
C2 Changes in recruitment rules
C3 Visa restrictions
C4 Increasing national and international competition
C5 Demographical changes

Table 6. Preliminary Outcomes of the CR explanation

Outcomes
O1 Advantages and disadvantages of the relationship
UM1+UM3+UM4+C= The Agency saves the University time and trouble (dealing with media), but the University feels that loosing contact with media can be problematic
UM1+UM2+UM4+C= The University has both positive and negative experiences with the service of the Agency. Some appreciate the service and say that the Agency does good media recommendations'; others say that the recommendations are 'no light bulb discoveries'. The University and the Agency would like each other to be more 'proactive and less reactive'
UM6+PM3+C= The University users who pay for advertisement in the Portal are satisfied (others have free profile – sometimes they don't even know that they have the profile).
PM3+AM3+AM4+C= The Portal is one of thousands media that the Agency uses, the Agency thinks that the Portal works well (mainly in one region), however, the Agency thinks that statistics are the last thing that media (including the Portal) think about. The priority is selling the space (the Agency often talks to sales representatives not digital representatives).
O2 Work-flow
UM2+UM4+C= Academics sometimes book media and let MOs know late.
UM4+UM5+C= some MOs prefer to deal directly with media and ask the Agency to only close the deal.
UM2+UM4+AM1+C= The Agency says that they regularly send report to the University about what is happening in the market to help the University to be more proactive; the University says that they asked for these reports but not everybody receives them; people who receive them find them helpful.
UM2+AM1+AM5+C= The Agency feels that the account of the University is very busy. There can be 10 contacts in 1 morning. But the University is one of the biggest, most interesting and rewarding clients for the Agency. The Agency is trying to unify the communication from the University, but at the end the Agency is happy to do whatever suits best to the University.
PM3+UM4+C= The Portal always lets the Agency know when they arrange a campaign with the University. The Portal appreciates the work of the Agency. For the Portal, the Agency is a bridge (however, extra channel sometimes makes communication harder).
O3 Financial misunderstandings
UM2+UM4+UM5+C= Varying perceptions of value for money, MOs generally not sure (or say they could get as good or better price as the Agency). Corporate of the University generally thinks that the Agency has better prices, the Agency is good value for money. The Corporate also understands why bulk discounts are not achievable.
UM5+UM2+C= Disparate understanding of financial flow, using terms interchangeably (rebate, discount, commission, sale). Nobody from MOs knew how flow and sales exactly work or should work. MOs say that statistics are expensive and not quick enough. Some faculties choose to do statistics themselves. The University Contract Coordinator was not sure whether savings were achieved with the Agency.
PM3+AM3+AM4+C= The Agency appreciates pay per click system of the Portal. They feel that money are well invested with the Portal.

8. Answering the research questions via the abduction and retroduction processes

This chapter aims to analyse the data critically using CR abduction and retroduction processes and to sharpen the understanding of the main CR explanation (Mechanism + Context = Outcome). Abduction, a theoretical re-description, is an essential part of data analysis. The case study will be contrasted with theories identified in the theoretical framework (IMP theory, education and marketing values, outsourcing, 4P Marketing, economic market theory). Retroduction processes concern further refining an understanding of CR explanation by questioning the data and recognising critical characteristics of the relationship between the University and the Promotional services. During the retroduction processes, other data sources (such as websites or strategic documents) are used to support the identification of the M + C = O.

In the case of this research the M + C = O formula lends itself to the three research questions (RQ), where each is characterised by one of the three CR elements. The first section of this chapter discusses mainly the themes identified as Outcomes of the research to address the RQ1. The second examines the Context identified during the first stage of CR analysis, to address RQ2, and the third is concerned with values, which are viewed mainly as Mechanisms, and answers RQ3.

8.1 RQ1: What characterises the interaction between the University and Promotional services?

This section answers RQ1 by capturing the complex interaction between the University and the Promotional services. This section is divided into four subsections. Three reflect on the Outcomes identified in the first analytical stage and last reflects on the Mechanisms related to values. These Outcomes and Mechanisms are: 1. Advantages and disadvantages of the relationship, 2. Workflow mismatch, 3. Financial (mis)understandings, and 4. Similar but mixed values. Table 7 captures the main structure of the RQ1 answer and serves as a guide throughout this section.

Table 7. RQ1. What characterises the interaction between universities and promotional services

RQ1. What characterises the relationship between the University and Promotional services?
1. Advantages and disadvantages of the relationship
a) The Agency saves the University 'time and trouble' , but losing contact with media can be problematic b) The University's positive and negative experiences with the service of the Agency c) Specifics of the Portal users - two participants of the University, both highly satisfied d) Appreciation and tension - characteristics of the Portal-Agency interaction
2. Work-flow mismatch
a) Academics sometimes book media & let MOs know late b) Some MOs prefer to deal directly with media and ask the Agency to only close the deal c) The issue of sending the Agency report to the University d) The University is the busiest but most rewarding account for the Agency e) For the Portal, the Agency is a bridge to universities 3. Financial (mis)understandings a) Varying perceptions of value for money b) Disparate understanding of financial flow & using terms interchangeably
4. Similar but mixed values
a) Market research and 4P marketing should be in the forefront when creating programmes
b) Measuring is essential
c) Marketing is important for universities to survive in the market
d) Mismatch between educational and market values

1. Advantages and disadvantages of the relationship

There is a wide range of advantages and disadvantages identified by the study. Participants' opinions characterising the advantages and disadvantages of the relationship may be summarised in the following points:

a) The Agency saves the University 'time and trouble', but losing contact with media can be problematic
b) The University's positive and negative experiences with the service by the Agency
c) Specifics of Portal users – two participants of the University, both highly satisfied
d) Appreciation and tension – characteristics of the Portal–Agency interaction

In the following paragraphs these characteristics and their Mechanisms are discussed. Theories with the best explanatory power are brought into the discussion in order to help explain and challenge the findings.

a) The Agency saves University ‘time and trouble’, but losing contact with media can be problematic

Most MOs and Corporate Services deal only with the Agency and let it deal with media. They say that this saves them ‘time and trouble’, which is greatly appreciated because the University now does more promotional activity than in the past. Marketing personnel feel that the demands on them are higher and they have less time to complete the work. There is a feeling that the University prefers outsourcing to employing more staff. The participants believe that the University does this to save money, although one participant is unsure if such a level of outsourcing does indeed do so.

The University appreciates the work the Agency is doing when dealing with media, but on the other hand it means that the University participants are losing the contact and direct communication with media that they had in the past. This is one of the reasons why some MOs still prefer to deal directly with the media and ask the Agency only to close the deal. The University has not used an agency before and some officers prefer keeping in direct contact with media because they obtain first-hand information and believe that they can negotiate a better price.

This characteristic may be viewed through the theoretical lens of the IMP framework discussed in the theoretical review chapter (Hakansson, 1982). Particularly relevant are the theoretical concepts relating to the interaction process and the atmosphere. Among others, the interaction process is characterised by interaction styles (Halien, 1997). One important aspect of the interaction style is the formality of control; in this case, the formality of control is low. Even though Corporate Services prefers everyone to deal with the media through the Agency, this is not always the case and some MOs choose to discuss campaign requirements directly with the media instead. They are, however, still dependent on the Agency to close the deal and pay the media (the IMP framework represents this by the power dependence concept, characterising the atmosphere of the relationship). Therefore, more than conflict between organisations, there is conflict between Corporate Services and some MOs. The other characteristic of the atmosphere, conflict versus cooperation, is therefore more applicable internally within the University and not, as the IMP model suggests, between the interacting parties. The IMP

Interaction framework touches this issue when talking about the role of individuals. However, it does not explain that these experiences may result from past behaviours and habits (e.g. the University has never used an agency before).

Another helpful theoretical concept by which to view point 1a) is the concept of outsourcing. An oft-stated reason for outsourcing is ‘freeing up resources for other purposes’ (Palm, 2001). This argument is therefore both supported and problematised in the data, which point out the problems with general arguments for outsourcing. Moreover, in the specific case of this research, two levels of outsourcing may be observed: first, the University outsources the media booking Agency and, second, the University outsources the media (the Portal). The media booking Agency can help the University to save resources (such as time); however, not all University personnel make use of this service, because they prefer dealing with media themselves and there is no control mechanism in place to see whether using the Agency saves the University time or not.

On the other hand, the main reason for using the Portal is disseminating information about programmes and recruiting a specific audience. This would be difficult to do internally because the Portal offers a specific service, therefore by using it the University both frees up resources for other purposes and obtains resources not available internally (Palm, 2001). The literature also says that outsourcing may cause a deskilling of staff and loss of knowledge (Deloittes, 2005), and may lessen the power of specialised departments (Allen et al., 2002). This is the case in the present study. The University participants mention that they are losing contacts and knowledge of the media, because it is the Agency that now deals with most contacts and they have lost the power to book the media themselves. However, the issue is once again more complex than the literature suggests. The main problem is that individuals have different ways of working and different experiences of the relationship with the Agency. Some say that the Agency gives good advice and deals well with media, therefore adds to the University’s knowledge and function. Others say that in general the Agency’s recommendations are rather standardised and that losing contact with media is unhelpful. It seems that this also depends on the type of campaign. When constructing a national campaign it is more likely that standard recommendations will be made, because they have proved to be effective in the past, whereas when an international campaign is constructed the Agency uses its knowledge of the international market, which the University possibly does not have. This suggests that not only is every outsourcing contract specific but that, within the contract, different operations may have different impact. General arguments for or against outsourcing therefore cannot be applied.

b) The University's positive and negative experiences with the service of the Agency

Within the University, there is a variety of opinions on the Agency's services. Some University participants appreciate the service and say that it makes good media recommendations; others say that the recommendations are 'no light bulb discoveries' and that the service 'isn't always great'. Such mixed opinions are caused by a number of mechanisms.

The first is the complexity and stratification of the University. The University is divided into a number of departments and faculties, and each may have a slightly different way of working and a slightly different understanding of the contract between the University and the Agency. Corporate Services, for example, advertises more often, so contacts the Agency more frequently. It also has larger budgets available to spend on advertising, so it is easier to pay for analytical services. It has a better understanding of the contract and does not expect the Agency to deliver services that are not part of the contract. Negative experiences for Corporate Services are limited to specific instances when a campaign did not work well.

The faculties do not have as close relationship with the Agency and the understanding of the contract between the University and the Agency is weak. The expectations of some MOs are high, because they were informed that the Agency is supposed to provide more services. Individual campaigns also contribute to the opinion of the MOs. Successful campaigns are appreciated, however one unsuccessful campaign may cause a higher level of caution when booking new campaigns.

The IMP Interaction model offers an interesting insight into this issue. It says that mutual knowledge and fit between interaction parties are important. In this case, however, the fit between the interacting parties is not simple, because the University does not function as a single entity but is divided into departments. Therefore, even though certain mutual knowledge and fit may be observed between the University Corporate Services and the Agency, often the same is not the case for the University faculties and the Agency. Interestingly, MOs mentioned that they had been told that Agency would do more than it does. It seems as though at the beginning of the contract Corporate Services also had higher expectations of the Agency and communicated this to the MOs, but over time the understanding developed and the expectations of Corporate Services became more realistic. This has not been communicated to the faculties.

The interaction style and the openness to communication are also essential, here (Halien, 1997). For example, it is crucial for the University to make clear what it expects from the Agency, whether this is innovative or more traditional and secure recommendations. The Agency has not mentioned the issue of the brief's clarity, but the University's Corporate Services is critical of itself, saying that the University does not always produce clear briefs for the Agency. This concept also seems to relate to the concept of 'perceived Outcomes of business relationship' (Halien, 1997). If communication is not open and clear, then perceived Outcomes will not match the expectation. Another example of such a problem is the issue of 'reactive versus proactive'. Both the University and the Agency say they should like the other to be more proactive and less reactive, but fail to communicate this sufficiently.

The IMP theory also raises the issue of negative experiences. Hakansson (1982) says that in the positive direction the atmosphere can only develop slowly and gradually. A negative atmosphere, on the other hand, can set in much faster. This corresponds with the experiences of the University. Building a positive relationship takes time and successful campaigns need to be accomplished for the University to be satisfied with the relationship. Only one unsuccessful or poorly managed campaign may cause a loss of trust and a subsequent increase in caution when booking new campaigns with the Agency.

c) Specifics of the Portal users – two participants of the University, both highly satisfied

During the research process, only two MOs were identified as active clients of the Portal (paying for advertising on the Portal). The first became acquainted with the Portal through the recommendation of the international office and the second through their own search for online media. Both users were highly satisfied with the services of the Portal. Although they both knew that the Portal is both internationally and regionally focused, one believed that it is mainly regionally focused. Both users say that Portal is proactive and delivers good statistics (measurements of campaign effectiveness). As mentioned in the previous chapter, the Portal maintains personal contacts with these two clients, corresponding to the philosophy of the Portal that personal contact with universities is important and statistics are essential.

All University participants knew of the existence of the Portal but most did not use it. This was usually because they found other media and portals more relevant to their campaigns or simply because the Portal had never approached them. Interestingly, many MOs did not know that there is information about their programmes on the Portal even though they do not pay. This is because, free of charge, the Portal feeds information about courses to their platform from other portals and accreditation agencies.

The IMP theoretical model again fails here to acknowledge the complexity of the interaction. Even though the model shows the importance of organisational and individual strategy, experience, aims or resources, it does not acknowledge the possibility of a high-level differentiation within a single organisation. This is the case at the University where some individuals proactively seek media such as the Portal and others and, even though they know of the Portal, do not use it because they consider other media more relevant to their campaigns.

d) Appreciation and tension – characteristics of the Portal–Agency interaction

This characteristic concerns the relationship between the Agency and the Portal. On the one hand, the Agency believes that the Portal delivers good value for money and the Portal appreciates the services of the Agency as a bridge between the Portal and universities. On the other hand, there is a real tension between what the Agency and the Portal say about measuring the effectiveness of campaigns. The Portal claims that it wants to work well with the Agency in order to prove that its promotional service and statistics are good, yet the Agency experiences problems with the statistical services of the

Portal. This contradicts the experience of the two University users of the Portal who say that the analytical service of the Portal is good.

One of the reasons why the Agency has negative experiences with the analytical services of the Portal is that it often deals with the Portal's sales representative, not its statistical personnel. The other reason is the different analytical systems used by the Agency and Portal; the Agency uses mainly Google products, whereas the Portal also uses its own analytical software. The Agency then complains that, even though it has access to the software of the Portal, this does not always allow it to measure exactly what it wants and clashes with some of the Google products used by the Agency.

This issue can be contrasted with the IMP technology attribute of the interacting parties. As with their other elements, mutual fit is important. In this case the analytical systems of the Portal and the Agency are not aligned, which causes disappointment on the Agency side. Moreover, interaction patterns are involved in this misunderstanding. In this case the individuals have the power to influence the atmosphere of the relationship. Possibly, if Agency talked more often to a statistical instead of a sales representative then some of the problems relating to analytical services might be resolved.

2. Workflow mismatch

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a) Academics sometimes book media & let MOs know late b) Some MOs prefer to deal directly with media and ask the Agency to only close the deal c) The issue of sending the Agency report to the University d) The University is the busiest but most rewarding account for the Agency e) For the Portal, the Agency is a bridge to universities
3. Financial (mis)understandings
a) Varying perceptions of value for money b) Disparate understanding of financial flow & using terms interchangeably
4. Similar but mixed values
a) Market research and 4P marketing should be in the forefront when creating programmes
b) Measuring is essential
c) Marketing is important for universities to survive in the market
d) Mismatch between educational and market values

The second outcome was identified as a workflow mismatch. This characteristic of the relationship between the University and the Promotional services is demonstrated by a number of issues:

a) Academics sometimes book media and let MOs know late

b) Some MOs prefer to deal directly with media and to ask Agency only to close the deal

c) The issue of sending the Agency report to the University.

d) The University is the busiest but the most rewarding account for the Agency

e) For the Portal, the Agency is a bridge to universities

a) Academics sometimes book media and let MOs know late

The MOs reported that media sometimes approach academics directly, trying to sell advertising space. Alternatively, academics themselves actively seek media through which to place an advertisement, unaware of the Agency's role in booking media for the University. This issue is again caused mainly by the complexity and stratification of the University. The University is not divided only by departments, faculties and schools; there is a split between academic and administrative staff. One of the specifics of academic staff is that they often have their own budget, so can place and pay for their own advertisements. Some media know this and try to sell advertising space directly to academics. When academics book advertising space, they often need marketing staff to produce the visuals for their advertisement. Sometimes they ask the MOs to produce the visuals too late and MOs then feel that they do not have enough time. Besides producing the visual work, MOs also have to inform the Agency about the media booking in order to proceed with payment, because the University cannot pay media directly. Communication between academics and marketing departments is often difficult. These two parts of the University are not well interlinked; they work differently and often have different opinions on how to undertake marketing. This will be further addressed in the discussion of RQ3.

The relationship between the academics and the marketing department is often complicated and controversial. The IMP theory distinguishes between individuals' and organisations' attitudes, aims, strategies and so on, however the University's issues are more complex. It is not an issue of the organisation versus the individual, but one department versus another. The IMP theory talks of social differences being reflected in the lack of knowledge between buyer and seller; in the case of the University, the social differences are not between them but between the marketing department and the academics.

b) Some MOs prefer to deal directly with media and to ask the Agency only to close the deal

As discussed in 1a), some MOs prefer obtaining first-hand information by dealing directly with the media. They also believe that they can negotiate as good a price as the Agency or better. The reason why it is mentioned in the Workflow outcome is to remind us that this is an important influence on the workflow between the University and the Agency.

c) Sending the Agency report to the University

The Agency participants say that they regularly sends reports to the Corporate Services department of the University and to the faculties' marketing departments about the current trends and situation on the HE market from the perspective of the Agency. It says that its aim is to help the University to be more proactive when booking media – the Agency says that it is important to book throughout the entire year). The University said that it has asked for these reports but not everybody receives them (‘maybe they are sending it, but not to me’). Those who receive the report say it is helpful.

This point is interesting for two reasons. The first is the issue of the Agency sending the report to the University, yet not everyone receiving it. This again results from the stratified nature of the University. Those who receive the report say that it is helpful, yet some Corporate Services and MO participants said that they do not actually receive it. The other interesting point of this characteristic is the reason why Agency says they produce the report – to help University to become more proactive in booking and thinking about advertising over the whole year, not only when important events are happening. This may be contrasted with the University’s claim that the Agency should be more proactive and less reactive in recommending media (discussed in section 1b).

It therefore seems that both parties expect the other to be more proactive and less reactive, without actually discussing this issue directly with each other. This relates to the interaction process, where in this sense certain adaptation processes were undertaken (the Agency started to produce the report because University asked for it), yet the relationship was not institutionalised because the parties do not have clear expectations and responsibilities for the relationship (Hakansson, 1982). Also, as pointed out by Halien (1997), the openness of communication and the investment initiatives are important to the agency–client relationship. In this case both parties would like the other party to invest more in planning and initiating campaigns, but their communication is not open enough to discuss such issues.

d) The University is the busiest but the most rewarding account for the Agency

The Agency participants feel that the University account is extremely active. There may be ten contacts in a single morning, yet the Agency's University team has only five people. It is one of its biggest, most interesting and rewarding clients. In order to improve the workflow, the Agency tries to unify communication between themselves and the University (through use of the Agency briefing form and group email). The University, however, does not always make use of these tools and, at the end of the day, the Agency is happy to work in a way that is best suited to the University. This issue also relates to 1b), where some University participants were dissatisfied with the services of the Agency and were not sure whether this is because the University is too big for the Agency or too small. Other University participants (including MOs), however, said that they are satisfied with the level of service and that the Agency deals with inquiries relatively quickly.

This issue again relates to the complexity and stratification of the University and the fact that anyone can contact the Agency at any time. The Agency would appreciate more centralised communication from the University, but at the moment this is not possible because there is nobody at the University to coordinate communications; indeed, it uses the Agency as a means of centralising the communication. Centralising communication was in fact one of the reasons why the University appointed the Agency. The Agency, however, does not seem to be aware of this.

In IMP theory this issue comes down to both the atmosphere attribute of openness of communication and the interacting parties. Communication is not clear enough, therefore the expectations of the interacting parties are not aligned. Moreover, even though the Agency worked on understanding the specifics of the University as a client, adjusted the team size and established team members to work well with the University, satisfaction is still variable.

e) For the Portal, the Agency is a bridge to universities

The Portal appreciates the work of the Agency and says that it is a bridge to universities. Even if the Portal discusses campaigns directly with the University, it always lets the Agency know the arrangements. The Portal, however, mentions that sometimes the extra channel makes communication harder.

IMP theory does not cover this complex relationship directly, yet the concept of power dependence applies, for example. The Portal is partially dependent on the Agency to recommend its services to the University, so it aims to have a good relationship and communication with the Agency.

3. Financial (mis)understandings

Table 9. RQ1. What characterises interaction between universities and promotional services?

RQ1. What characterises the relationship between the University and Promotional services?
1. Advantages and disadvantages of the relationship
a) The Agency saves the University 'time and trouble' , but losing contact with media can be problematic b) The University's positive and negative experiences with the service of the Agency c) Specifics of the Portal users - two participants of the University, both highly satisfied d) Appreciation and tension - characteristics of the Portal-Agency interaction
2. Work-flow mismatch
a) Academics sometimes book media & let MOs know late b) Some MOs prefer to deal directly with media and ask the Agency to only close the deal c) The issue of sending the Agency report to the University d) The University is the busiest but most rewarding account for the Agency e) For the Portal, the Agency is a bridge to universities
3. Financial (mis)understandings
a) Varying perceptions of value for money b) Disparate understanding of financial flow & using terms interchangeably
4. Similar but mixed values
a) Market research and 4P marketing should be in the forefront when creating programmes
b) Measuring is essential
c) Marketing is important for universities to survive in the market
d) Mismatch between educational and market values

The third outcome that represents RQ1 discusses participants' understanding of the financial flow between the University and the Promotional services. Finance is important in the relationship, because cost saving was one of the main reasons why the Agency was contracted, and other reasons were increased consistency and control over advertising. It was therefore decided to run a tender procurement process and the Agency was the successful candidate. Interestingly, some participants present it the other way round; instead of the University deciding to run a tender process for above reasons, they believe that the University was compelled to undertake the EU tender process because it was spending a large amount on advertising.

The characteristics of this Outcome are:

a) Varying perceptions of value for money
b) Disparate understanding of financial flow & using terms interchangeably.

a) Varying perceptions of value for money

The University participants vary in their understanding of value for money and of whether savings were achieved with the Agency. MOs are generally unsure whether using the Agency brings savings. Some MOs believe that they can negotiate as good a price or cheaper than the Agency. Other MOs, however, say that if they were in the private sector they, too, would probably negotiate costs with the Agency or the media, but do not do so because they are in the public sector and quite 'quite far down the food chain'. Corporate Services is more convinced about the value for money and the savings that have been secured through the Agency. However, there are no clear data on such savings. The only indication offered is the Agency media schedule, where the Agency lists the price with and without a 'rebate'. Also, the University CC says that it is difficult to say whether savings were achieved because the University now advertises more than before, therefore spending before and after using the Agency are not comparable.

The Agency is confident about its value for money and says that its prices are discounted. However, the Portal says that the price to the University would be the same, regardless of the existence of the Agency. This is because the Portal pays commission to the Agency which, the Portal believes, does not affect the University.

Both the Agency and the University users of the Portal say that the Portal offers good value for money. The main reason for this clear claim is the Pay per Click system that the Portal uses. This system ensures that the University pays only for students who actually click on the advertisement, and not all those who merely see the advertisement.

The complexity and stratification of not only the University but all the relationships play a role in the diverse understanding of financial value. The expectations and experiences of the University also play a part, and how the contract was negotiated also influences the perception of financial value. Many

University staff believe that the Agency would report effectiveness statistics, however this was not incorporated into the initial contract.

This can be contrasted with the literature on outsourcing that says that reducing cost is one of the main reasons for outsourcing services (Palm, 2001). However, as the literature also states, currently there is little evidence on savings achieved through outsourcing (KPMG, 2009) and the promised cost savings are 'generally eaten up by the "forgotten" start-up, monitoring and renegotiating costs' (Jefferys, 2012). This is clearly reflected in this study. The process of measuring effectiveness statistics has been 'forgotten' in the contract and, in general, nobody knows whether savings were achieved because there is no effective system for monitoring savings.

b) Disparate understanding of financial flow and using terms interchangeably

The University participants have a rather disparate understanding of how financial flows between it, the Agency and media work, or how they should work. Also, terms such as 'rebate', 'discount', 'commission', 'fee' and 'sale' are used interchangeably, most strikingly the use of the first three terms.

A rebate is defined in the theory as a 'return of a portion of the purchase price in the form of cash by the seller to the buyer' (AMA, 2014). This, however, is not the way the Agency and the University use the term. Participants talk about a rebate as a discount offered by the Agency to the University. This may also be observed in the media schedule document produced by the Agency, where a 'rebated price' is presented next to total cost and total University cost. The 'rebated' price is the price that the University pays. Rebate, therefore, does not signify a return of money but a sort of second stage discounted price that the University pays. The MOs look at all three prices and pay the rebated price. One MO mentioned that it is not clear how the other prices are calculated.

The way that the Agency explains the discounting scheme helps an understanding of why the term 'rebate' is used. The Agency says that it usually receives an 'agency discount' or 'agency commission'. This is a discount from the media offered only to the Agency, not the final client. The Agency then gives some of this 'discount' '*back*' to the client. The Agency used the term 'back' when describing what happens with the discount and this explains the use of the term ‘rebate’, but this still does not align with its theoretical meaning.

4. Similar but mixed values

The research identified a number of values held by the participating organisations and individuals. Values will be discussed and contrasted with theories mainly in the chapter related to RQ3.

Table 10. RQ1. What characterises the interaction between universities and promotional services?

RQ1. What characterises the relationship between the University and Promotional services?
1. Advantages and disadvantages of the relationship
a) The Agency saves the University 'time and trouble' , but losing contact with media can be problematic b) The University's positive and negative experiences with the service of the Agency c) Specifics of the Portal users - two participants of the University, both highly satisfied d) Appreciation and tension - characteristics of the Portal-Agency interaction
2. Work-flow mismatch
a) Academics sometimes book media & let MOs know late b) Some MOs prefer to deal directly with media and ask the Agency to only close the deal c) The issue of sending the Agency report to the University d) The University is the busiest but most rewarding account for the Agency e) For the Portal, the Agency is a bridge to universities
3. Financial (mis)understandings
a) Varying perceptions of value for money b) Disparate understanding of financial flow & using terms interchangeably
4. Similar but mixed values
a) Market research and 4P marketing should be in the forefront when creating programmes
b) Measuring is essential
c) Marketing is important for universities to survive in the market
d) Mismatch between educational and market values

Values, however, form an important characteristic of the relationship between the University and the Promotional services. For that reason the basic characteristics of the findings related to values are presented here. Operational values (e.g. Work well with the client, Enhance the reputation of the organisation) are shared by the organisations. Individual values (e.g. What do I consider to be a good practice of marketing for HE?) are, however, complex. Generally, the University shares a number of values with the Promotional services, relating mainly to how marketing for HE should work. However, as will become clear when discussing RQ3, the division between education and market values is more complicated than theory suggests. Nevertheless, the main characteristics related to values are:

a) Market research and 4P Marketing should be in the forefront when creating programmes

b) Measuring is essential

c) Marketing is important for universities to survive in the market

d) Mismatch between educational and market values.

a) Market research and 4P Marketing should be in the forefront when creating programmes

The University, the Agency and the Portal mention that marketing and market research are highly important to HE. Market research should measure mainly the needs of students, but there is also potential to use it to understand the needs of society and economy. No one, however, expanded this point to focus on how this could be achieved. Only one participant said that the ‘needs of the student ultimately match needs of society’.

Participants also agree that all 4Ps of the Marketing Mix should be used in HE. At the moment, marketing departments only influence the promotion of educational programmes and have no influence over the focus and content of those programmes, the price or the location of programme delivery. Such divided responsibility is not mentioned in the literature. There are many reasons why University marketing personnel see marketing activities as being of increasing importance (e.g. changes in the environment, internal steep targets on student numbers, education and past profession of marketing personnel).

b) Measuring is essential

Measuring the effectiveness of advertising is important, participants agree. The Portal advocates the idea of not only measuring impressions or click through but conversion to enrolled students. The Agency measures mainly click through, while the University measures click through and should like to measure conversion to enrolled students, but does not have a system in place to make such measurements. The Portal says that some of their ‘best’ clients measure conversion to enrolled students, however for this to be realised a connection between the marketing department and the admission department must be established. Some marketing departments at the University have contact with the admission departments, however the links are not institutionalised.

c) Marketing is important for universities to survive in the market

The University, the Agency and the Portal share the opinion that marketing is essential for universities to survive in their quickly changing environment. The University now undertakes more promotion and MOs say that they have never worked as hard as they do now. This corresponds with the literature that says that UK universities increased their marketing budgets by 22 per cent when fees increased from £3375 to £9000 (Matthews, 2013). Both the Agency and the Portal say that investment into marketing is important and universities should be strategic in communication and when designing their offer.

d) Mismatch between educational and market values

There is a mix of educational and market values in the data. Interestingly, the conflict between these values is more visible at an individual level than an organisational level. There are some important feelings about how marketing relates to the educational experience of a student and changes in the context/environment influence the values related to marketing for HE, and these issues will be discussed further in RQ3.

This section answered the RQ1 by identifying and discussing a number of issues characterising the relationship between the University and the Promotional services. The next section continues with the analysis and addresses the RQ2 and the importance of context for this relationship.

8.2 RQ2: Is context important for understanding the relationship between the University and Promotional services and does this comply with IMP Interaction theory?

Context has a special place in CR as well as in IMP Interaction theory. CR's definition of Context is, however, rather nebulous. In fact, Context in CR may be understood simply as conditions or other Mechanisms. Context can therefore be viewed as extrinsic conditions and Mechanisms as intrinsic conditions (Sayer, 2000). The researcher then needs to make a decision on what is considered to be a Context and what a Mechanism. In the case of this research the decision was based on the main theory used in the theoretical framework: the IMP Interaction theory. The IMP Interaction theory is clear on what is known as an 'interaction environment'. This interaction environment in fact is a macro environment. The IMP Interaction theory says that market size, structure of the market, dynamism of the market, degree of internationalisation and social systems are the main influences in the environment (Turnbull & Valla, 1986). This research therefore considers the macro environment to be the Context of the relationship between universities and promotional services. Micro environments such as the organisational structure or the atmosphere between the interacting organisations are considered to be Mechanisms. Another reason why the line was drawn at this level is that the actors (the University, the Agency and the Portal) cannot directly influence the macro environment (the Context), but at some level can influence the organisational structure or the atmosphere of the interaction.

To answer RQ2, collected data are contrasted with the IMP theory (the basic aspects of the environment in the IMP theory are: market structure, dynamism, internationalisation, position in the manufacturing channel and social system). The main issue with the IMP theory is that four of five environment characteristics (market structure, dynamism, internationalisation and position in the manufacturing channel) relate to companies' interactions with other parties. The only characteristic that looks at the wider influences is 'social systems'. This does not seem to have strong explanatory power when trying to understand the relationships between universities and promotional services. Also, the 'dynamism' aspect representing the closeness of the relationship and the dependence on a small number of relationships (Hakansson, 1982) is better reflected in this research at the level of interaction, not the environment. Even though the IMP model serves well for conceptualising the relationship between companies, it must be remembered that its prevailing purpose is to conceptualise relationships in industry. The environment not only misses the important characteristics of the public sector, but the industrial terminology makes it difficult to apply the concepts to HE. Nevertheless, the data will be contrasted with the theory and steps for theoretical re-description will be suggested. The analysis of the interview data is complemented by documents in order to proceed with the retroduction processes and push the explanatory power of this study further. The discussion of findings also reflects the arguments introduced during the literature review.

This section is divided into subsections. Each reflects on one of the Context characteristics identified in the first analytical stage (Table 5). Each characteristic is first briefly described, as perceived by the research participants, and then deconstructed through abduction and retroduction processes. Five main Context characteristics were identified in the first analytical stage: 1. Public cuts to teaching and research, and the consequent increase in tuition fees, 2. Changes in recruitment rules, 3. Visa restrictions, 4. Increasing national and international competition, and 5. Demographical changes.

1. Public cuts to teaching and research, and the consequent increase in tuition fees

Participants' experiences and views on the tuition fees increase relate to the discussion on price developed in the literature review, where the government influences the level of tuition fees for undergraduate students. After the undergraduate tuition fees cap was raised in 2012, the University increased its undergraduate tuition fees twofold. Recovering the government cut in funding is presented by the Vice-Chancellor of the University as the main reason for increasing tuition fees to £9000.

Public cuts and the consequent increase in tuition fees were the most often mentioned environmental influencer. Every participant commented on the influence of this factor on their work. The overall feeling is that the University now must work much harder to attract students and to convince them that their money is well invested. The participants feel that this relates to promotional activities and also to other activities of the University such as teaching. The Promotional services also consider the increase in tuition fees to be an important motivation for increased and more strategic marketing activities. The direct effect of such change is that the University promotes more, the Agency's account is therefore busier and media such as Portal receive more attention from the University because now there is a feeling that more advertising in media is needed.

This issue can be contrasted with IMP Interaction theory, specifically the concept of social systems. However, the way in which IMP theory interprets social systems is rather broad. Social systems simply signify the wider environment surrounding a particular relationship. The IMP theory mentions that this may include cultural differences, or regulations and constraints on business such as exchange rates or trade regulations (Hakansson, 1982). Decreasing public funding to universities and raising the cap on undergraduate tuition fees is a government regulation that influences the actors in the market and the relationships between them. Therefore, if the IMP model is re-developed to describe the relationship between universities and promotional services, not only should the educational context and educational regulations be included in the model but the importance and overarching effect of such regulations highlighted. Another relevant theoretical concept is the critical points (Halien, 1997). The moment of increasing tuition fees and consequent lower recruitment was a described as a 'wake-up call' for marketing of HE.

2. Changes in recruitment rules

The changes in recruitment rules were mentioned as an important aspect of University marketing activities. In 2012, for example, there was a cap imposed on student numbers, apart from AAB students, changed in 2013 to ABB students (HEFCE, 2014). This influenced the promotional tactics of universities when trying to compete for the highest achieving students. How A-levels were scored also changed in 2012 and this 'again squashed the amount of people that were out there' to recruit.

From the perspective of economic market theory discussed in the literature review, buyers and sellers must be able to decide independently what and how they want to sell or buy (Brown, 2010). The data not only demonstrate that there are regulations on recruitment but that such regulations influence HE marketing strategies (e.g. poaching students, clearing strategies, more effort and money for advertising to international students, etc.)

From the perspective of IMP theory, this aspect fits the category of social systems, mainly because the category is so broad. As mentioned in the point above, to understand the University–Promotional services relationship, this category needs to stress the extent of government influence on the actors in the market and their activities (such as recruitment).

3. Visa restrictions

Visa restrictions are another external influence on universities' recruitment, mainly relating to changes to post-study work visas and the government's counting international student in immigration figures. Such restrictions are perceived by the University as a barrier to international student recruitment. The Promotional services navigate this situation by working on specific solutions (e.g. promoting more in Europe, where no visas are required).

Visa restrictions are an important influence on HE recruitment. They curtail universities' freedom to recruit even higher number of international students, thereby undermining another freedom of the economic market theory. They also impact on universities' marketing strategies. For example, to overcome visa restrictions universities engage in building campuses overseas and developing distance learning courses and MOOCs, specifically targeting European students since they do not need a visa. Overcoming visa restrictions is not the sole purpose of such activities, but is one of the motivators for such strategies.

IMP theory relates to this issue from two perspectives: the internationalisation perspective and the social system perspective. The internationalisation aspect of the macro environment points out that a company's interest in internationalisation affects its organisation structure, its need for overseas buying units and its need for special knowledge of the international market (Hakansson, 1982). Both the University and the Promotional services are interested in international cooperation and recruitment. Visa restrictions motivate universities to find other ways of establishing international cooperation and recruitment, which requires special knowledge of both parties (e.g. how to approach international students, what countries are more accessible, what information students need). This issue, however, fits better into the social systems perspective because it represents the attribute of government regulation. The re-developed theoretical framework needs to reflect on the specifics of this attribute.

4. Increasing national and international competition

Universities compete for students and Promotional services compete for universities. The University should like to increase the number of international students so the international student body accounts for a third of the student population. The University participants perceive competition from other universities that are also developing concerted efforts to attract students and climb the league tables. The Agency works with over twenty universities and thousands of media, of which the Portal is one. And the Portal works with over twenty agencies in the UK and promotes over a thousand universities.

Free competition is one of the conditions of the economic market theory. As the literature review discussed, governments still influence HE competition, for example by regulating the institutional market entry conditions. Nevertheless, the number of universities is increasing and the number of promotional agencies and media is high. All participant organisations are therefore influenced and motivated by increasing national and international competition. The way to deal with such competition is: to strive for a good reputation, good communication with stakeholders (e.g. students, agencies, media) and to look for and promote institutional competitive advantage (e.g. league table position of the University, free profile service of Portal, or the experience of the Agency). Elaborate marketing strategies, which include comprehensive market research, are mentioned by all participants as a means of achieving success in the highly competitive market.

The concept of environment in IMP theory is, in fact, mainly about interaction with other companies. This is helpful for understanding the issue of competition. The theoretical concept of the market structure, for example, points to the importance of the concentration of buyers and sellers as determining the number of possible alternatives for the firm. This is a highly relevant issue for all parties in the research. The University knows that students have a wealth of choice and they choose from a number of alternative universities. Also, the Agency has to prove its value to the University and in a tender process competes against other providers (regulated by the EU via the regulations for EU spending). The Portal has not only to prove its value to the University but to the Agency and to the student.

The internationalisation concept of the IMP theory is also applicable here. The international aspect affects the University, which competes for international students against international universities. Special knowledge of international markets is therefore necessary. The Agency and the Portal can provide this expertise to the University to help with international competition. The Agency is UK-based therefore mainly it is national agencies that comprise the Agency's direct competitors. On the other hand the Portal is an international web-based platform that competes with a high number of national and international services.

Demographic changes

Among the external factors influencing the recruitment (fees, caps on student numbers, visa and competition), demographic changes were mentioned by the head of strategic marketing at the University. It is now believed that 'naturally demographic is going down until 2020' [sic], which has an impact on the number of students applying to universities.

This factor is considered neither by IMP theory, nor by economic market theory. The only theory from the theoretical framework concerned with similar issues relates to marketing. Segmentation strategies deal with the place of sale (one of the 4P Marketing Mix), and consider demographics and understanding the population crucial for developing marketing strategies.

8.3 RQ3. Are the values of the University and Promotional services aligned?

This section is concerned with the values of universities and promotional services. RQ3 asks whether the values of the University and Promotional services are aligned. This section first discusses the values of the Promotional services, then the values of the University. Finally, the values of these organisations are contrasted and the answer to RQ3 is developed.

Within the CR framework, organisational values may be categorised into a complex structure of Mechanisms. Value statements were identified by analysing the answers to the Echo questions (e.g. What is good practice and what is bad practice in HE marketing?) (Cunningham, 2001). Participants, however, made value statements throughout the entire interview process, therefore other statements that conform to the definition of values as described in the theoretical framework were identified. Value 'is a single belief that transcendentally guides actions and judgements beyond immediate goals to more ultimate end-states of existence' (Rokeach, 1969, p. 160). This understanding of values also encompasses believes and attitudes.

As part of the abduction processes, the data are contrasted with theory that captures the differences between education and market values (McMurtry, 1991). This theory was discussed in the theoretical review chapter of this thesis. The theoretical review uncovered a number of limitations in the theory of the education and market values; for example McMurtry's (1991) argument that the values are opposed was challenged in the theoretical review. Nevertheless, the framework provides a useful tool for exploring and contrasting participants' values. The set of values (not the opposing set of values) will therefore be contrasted with the values of the participating organisations. The data will also help to understand whether the critique of the theory, as established in the theoretical review, is accurate. The theoretical values consist of goals, motivations, methods and standards of excellence of education and the market. The theory says that the main goal of the market is 'to maximise private money profit', whereas the goal of education is 'to advance and disseminate shared knowledge'. The motivation of the market is to 'satisfy the wants of whoever has the money to purchase the goods that are wanted'. The motivation of education, then, is 'developing a sound understanding of whether it is wanted or not'. The method of the market is to 'buy or sell the goods it has to offer to anyone for whatever price one can get'. The method of education is 'not to buy or sell to anyone, then, but to require of all who would have it that they fulfil its requirements autonomously. The market's standard of excellence then is 'a well-made and problem-free product line', whereas education's is 'disinterested and impartial information, and possessing deep and broad problems' (McMurtry, 1991).

These theoretical points will be contrasted with the data in order to answer the research questions. RQ3 is an overarching question that maybe answered only after answering RQ3.1 and RQ3.2. Retroduction strategies will also be employed to deepen the understanding of values as Mechanisms.

8.3.1 RQ3.1: What are the values of the Promotional services and do they conform to the theory of market or/and educational values?

This section first discusses the values of the Portal and subsequently the values of the Agency. Even though the Promotional services share a number of values, there are areas where differences were to be observed. Each subsection first briefly summarises the values as presented by the research participants and then develops a discussion along the lines of retroduction and abduction processes.

Values of the Portal – a summary

The Portal participants hold some general operational values such as working well and in a close relationship with the Agency and the University. The Portal strives for a good reputation, as this helps it to attract more universities. It also claims that it commits to results in the sense of effective campaigns and measuring. The Portal measures click through rates, also, with some 'best' clients, the enrolment effect of the campaigns. The Portal also teaches universities how to use Google Analytics to measure the effectiveness of campaigns, because it believes that universities should undertake effective marketing but also shows that its service is effective. This can be risky, because universities may see that other media are as effective or more so. The Portal participants, however, says that it is not a 'money-based' or a 'competitive' company, but a consultancy – helping universities to do effective marketing and students to choose their university. One of the Portal's participants also uses the Portal to look for study programmes, which demonstrates a personal belief that the Portal offers good information about courses of study.

The Portal stresses its special relationship with students. It started as a students' organisation and says that students are its priority; 'universities use us for promotion, that's fine, that's great, that's how we finance ourselves, but in the first instance we are a study choice Portal'. Giving students information via the Portal and presentations (e.g. letting students from the UK know that they have the opportunity to study cheaper abroad) is important to the Portal. Its special relationship to students may be clearly observed in the Portal´s statements as well as on its website, which contains space for students to express their own experiences of studying at various universities. The Portal is also supported by a number of student organisations and is proud to offer to universities, free of charge, a basic profile listing. The Portal thinks that free listing is good for students, because they may at least locate the university. It is also good for universities because they receive some traffic, and ultimately it is also good for the Portal, because the more that universities use the Portal, the more students use the Portal. And the more students who use it, the more universities are interested in advertising with it. Nevertheless, a contradictory value statement of the Portal relates to how universities are presented on the Portal. It says 'we don't push or promote anyone above anyone else', however it is aware that if universities pay for the Portal's campaign, their profile receives five to nine times more visits.

In general the Portal believes that universities should invest more in their marketing and that market research, together with strategic marketing, should be one of the priorities for universities to spread information to students so that the right students are matched to the right universities. The Portal bases this opinion on its experience with universities and its own observations, but universities' spending with the Portal comprises its main experience, so such claims seem to suggest that it thinks that universities do not invest enough in advertising with the Portal.

The Portal values the work of the Agency, because it represents a bridge between the Portal and universities.

Values of the Portal – a discussion

There are a number of contradictions in the data. For example the Portal says that it is not a competitive or a money-based company, yet that it strives to attract more universities. Another contradiction is represented in the idea of not pushing any university above another, yet at the same time offering a paid advertisement service that yields five to nine times more visits. Yet another is the representation of universities using the Portal for promotion as being subordinate to offering information to students.

The way the Portal sees its work as relating to the actual educational experience of the student is mainly in influencing the students' choice of university. The Portal's director for example believes that students who use their services are better informed and that a 'better study choice leads to better educational experience, less drop out, higher satisfaction'. This, however, is a personal opinion of a Portal participant, not based on the research. The work of the Portal therefore relates mainly to the last theoretical value statement (standards of excellence). Nevertheless, all theoretical value statements must be discussed in order to evaluate the relevance of the market versus education values arguments to the research problem.

The first market value, ‘maximising private money profits’, does not seem to be a direct goal of the Portal, because its philosophy is primarily student-focused. Also, the Portal is not financed solely by universities’ advertisements but also by government bodies. However, it is also this philosophy that attracts more (potentially paying) universities, and ‘because of that philosophy I think we are also so successful. Serve students best to get the visitors and only with visitors you are of interest to the university’.

McMurtry (1991) contrasts this market goal with the goal of education, ‘advancing and disseminating shared knowledge’. This relates to the idea of education for those who are interested in study, not those with the money to afford it. This could be directly related to the Portal’s offer to every university to advertise free of charge on the Portal, not only to universities who are able and willing to afford it. Also, information about universities is available to students free of charge on the Portal. It offers information on the scholarships and grants available and this demonstrates a concerted effort to ‘advance and disseminate shared knowledge’.

‘Satisfying the wants of whoever has the money to purchase the goods’ is the characteristic motivation of the market. The Portal advertises the profiles of any institution, and there are no criteria regarding the quality of either the institution or the information provided. It tries to check the accuracy of the information on the platform, however the best authority to confirm this is always the university. Any university can have a paid or a free profile on the Portal; on the other hand, it satisfies students’ needs for information and compares study programmes. This is provided to all students free of charge.

The characteristic motivation of education, on the other hand, is ‘developing sound understanding whether it is wanted or not’. This relates to teaching what is needed to understand the subject, not just what students like and want to learn. This value may perhaps be contrasted with the Portal’s opinion on developing programmes based on students’ wants and needs. There is a strong belief that programmes should be based on market research. Such research should be concerned mainly with students’ needs, but also society’s and the economy’s needs. However, it is unclear how the needs of society or the economy could be measured.

The market method is 'buying or selling goods to anyone for whatever price one can get'. This applies to the Portal, because any university may buy advertising space on the Portal. This gives universities a profile with advanced features (e.g. video), or higher visibility on the website, or both, although universities may advertise on the Portal free of charge, as mentioned above.

The educational method, 'autonomous fulfilment of requirements', is not reflected in the work of the Portal. Students do not have to fulfil any requirements apart from internet access to use the Portal, and the only requirement for universities is location and funds, if they wish to have a paid advertisement. The issue of 'autonomous fulfilment of requirements' could, in this context, therefore be considered irrelevant.

A 'well-made, problem-free product line' is one of its market aims as well as a goal of the Portal. As it claims, 'our job is to make sure that we are giving them what they need when they need it', yet the educational standard of excellence of 'disinterested and impartial representation and possessing deep and broad problems' seems also to be important to the Portal in the sense of offering quality information to students. Nevertheless, as mentioned above, even though it strives to provide correct information to students, the Portal is not able to check the accuracy of all information that universities publish. It often has to trust a university to provide correct and truthful information. To contrast with official information provided by universities, it offers a social network for students where they can share their experiences of studying at a certain university.

In general it seems that the Portal tries to satisfy universities' needs and help them to secure a return on their marketing investment, and to help the Agency to work with universities, while at the same time holding education values and aiding students to make informed choices.

Values of the Agency – a summary

The Agency shares basic operational values with the Portal – working well with the client, attending to client's needs – 'clients' needs are our needs' – and being passionate about successful continuous growth.

Similarly to the Portal, the Agency believes that market research should be at the forefront and programmes should be market-tested for robustness. It also believes that it is important to understand students' decision making and it undertakes market research to understand the emotional mind-set of potential students in order to tailor its messages. Measuring the effectiveness of campaigns is a priority, but the Agency measures click through, not conversion. However, it believes that the keyword for universities is enrolment and students are more valuable now they bring more money. They believe that measuring conversion is good, but difficult. It believes, in addition, that universities have to have clear strategic communication to survive in the competitive HE market: 'universities have really got to be more like businesses, because the students, some people like me, parents, we are consumers.'

The way the Agency sees the relationship between its work and the educational experience of the student is similar to the Portal and understands that marketing influences the choice of a student. An interesting insight was offered by one participant who compared work attitudes with the attitudes of a parent. In this sense the participant said that marketing may confuse young people, because elaborate marketing campaigns target young people and if their parents do not know what to advise, the student might be attracted to the university that sent the most appealing promotional material, not the one that represents the best match for that student. As a parent it is therefore important to advise children. As a marketer, however, it is important to produce such campaigns, because they work. As another participant said, 'marketing works; that is why Coca-Cola and McDonalds spend so much on it'.

On the other hand, participants believe that education is a worthwhile investment and going to university is a life-affirming experience, so students should be pushed towards universities and information about them should be delivered in an interesting, passionate way. The Agency says that it is important to provide students with a 'real feel of what they will get from the University and what they will get from the course'. This can be achieved through advertising.

Values of the Agency – a discussion

This subsection contrasts interview data with the value points raised by McMurtry (1991). The first point is the goal of the market, 'maximising private money profits'. This is a difficult point to look at, because the Agency has not directly commented on its business strategy apart from stating that it has a passion for the business and ensuring its success and continual growth. The website offers no related information. It mainly shows examples of the Agency's work and its value statement. It is not usual to include 'profit making' in a company's value statement, so it can only be assumed that because the Agency is a private company, thus not publically co-financed, profits are important for running and developing its business. The contrasting education goal is 'advancing and disseminating shared knowledge'. The information about universities presented by the Agency is disseminated to potential students and sharing of such information is desirable. However, when viewed from a critical perspective, the Agency works only for paying clients hence does not disseminate information that is critical of client universities.

'Satisfying the wants of whoever has the money to purchase the goods' is the motivation of the market. McMurtry (1991) pitted this argument directly against recruiting students for money rather than their ability. In the advertising business, it is no surprise that agencies provide their service to any client or university with the money to pay for it. Education, on the other hand, should provide 'understanding whether it is wanted or not'. The Agency, similarly to the Portal, believes in the power of market research and developing programmes that are wanted in the market, providing its service only to interested universities and those with enough funds. This point could also be reflected in its relationship to students, and the desire to understand a student's mind-set and decision-making processes that helps the Agency to target students in such a way that its message is received and understood by the student – whether it is wanted or not.

'Buying or selling goods to anyone for whatever price one can get' is an aspect that is more controversial for universities than for advertising services. No one really expects agencies to test universities against certain criteria, and to decide to work with them only if they 'fulfil the requirements in an autonomous fashion'. The other way around, however, the University does indeed expect the Agency to fulfil its requirements, first in the tender process and second in every campaign. However, as mentioned in a similar discussion above, unless this educational value is related to students working on their assignments or projects autonomously it is almost irrelevant to the analysis.

A ‘well-made to sell, problem-free product line’ is the standard of market excellence. This again reflects how the Agency works because, even though the Agency tries to influence the way the University works by centralising communication from the University, at the end of the day the Agency will do what is easiest for the client. This point is contrasted with ‘disinterested and impartial representation and possessing deep and broad problems’. McMurtry (1991) says that disinterested and impartial representation is the aim of education, which is in strong conflict with the aim of marketing to ‘impel its recipients into wanting to buy a product’. This is the most relevant value issue for universities and promotional services. On the one hand the Agency wants to build students’ initial experience of the university through advertising, yet on the other hand it is conscious of the power of marketing communication to influence and potentially to confuse students.

8.3.2 RQ3.2. What are the values of the University and do they conform to the theory of educational and market values?

Values of the University – a summary

The University has expressed a number of different values. Some relate to the operation of the relationship of the University and the Promotional services, others to the work of marketing personnel at a university, and yet others to attitudes and values related to education and marketing’s relationship to education. The prevalent value regarding the operation of the relationship between the University and the Promotional services was an appreciation of sound advice and service from the Agency and the Portal, as discussed in RQ1. Nevertheless, participants vary significantly in their understanding of the relationship and preferred ways of working with the Agency.

Participants agree that, even though the University as a whole has made steps towards a greater appreciation of marketing work, further changes are needed and a better application of strategic marketing is important. Many marketing personnel believe that it is necessary to react to the market, to make marketing more data-driven and to increase the involvement of marketing in programme development and validation. However, this is difficult because it is not the practice of the wider University and marketing personnel feel that they cannot influence the academics’ opinions on programmes development.

It is believed that increased fees have changed the mind-set of students, who are now more questioning of value for money in their choice of university. It is also recognised that the return of investment from campaigns is important. That is why measuring the effectiveness of campaigns is necessary, and 'demonstrating value is the marketers' bible'. Some participants are motivated not only by click through or information requests but by actual enrolment. One participant, however, mentioned that it is not desirable to be directly linked to admission, because marketing does not influence programme design. Most participants are anxious about the new situation, but are prepared to embrace the changes. One participant mentioned that MOs can promote the great things the University is doing, however there is nothing they can do about widening participation, for example. Another participant commented that the fact that now MOs have to put their 'business hats' on is sad, but that there is no return to the 'old idealistic times'.

Two participants mentioned that the University should think more commercially when trying to negotiate advertising space, because at the moment it tends to accept the price offered by the Agency. Some participants recognised that there is more private funding and the institution is commercially driven ('learning and research must be supported commercially otherwise we will have nobody to teach and nothing to research'), as well as not profit-driven. There is, however, a prevailing idea of working for the good of the people outside of the organisation (students, economy) and the importance of targets not becoming greater than students' needs. One participant found it important not to be financially driven by targets and another said that, even though the aim of marketing is to recruit them, it is important to give students the right information and to provide the opportunity for them to decide whether they really want to come to the University or not. One participant said, 'if it's not right for the student, it's not right for the University'.

The participants have a specific relationship with the University as an institution. Often, even if they do not agree with all that happens at the University, they appreciate the direction it is moving in or the teaching and research it undertakes. Participants use words such as 'I love the University', 'we do amazing things here', 'University is a living thing' and 'University is a fantastic place', and they work to put that information about the University out more. This contrasts, however, with the considerable demands of time and effort on marketing personnel that makes some participants feel overworked and pressurised.

Similar to the Promotional services, the University recognises the potential of marketing to influence students' decision making. It also believes that marketing can and should have a stronger influence on education and should help to design the product or programme. At the moment, the input of the marketing department to market research or recommendation to academics is small. Another way in which marketing influences the educational experience of prospective and current students is by communicating 'right information right time and the right way'. The University also involves current students in promotional campaigns.

In general, the idea of University participants is that marketing and education are mutually beneficial. When the work of academics combines with marketing knowledge, it is possible to have the right product and the right students.

8.3.3 The University values – a discussion

The data may now be viewed in the light of the theoretical values of market and education. The first point relates to the goals of education and market. Market's goal is 'maximising private money profits'. Some participants understand that the University is a not-for-profit organisation. Other participants, however, say that the University must generate enough income to co-finance its teaching and research. The strategic document of the University clearly states that developing profitable activities is important. The University therefore follows the market goal. This has a direct influence on the educational goal of 'advancing and dissemination shared knowledge'. In marketing this may be reflected in many ways. On the one hand University marketing aims to disseminate knowledge to prospective students and to advance their general knowledge (e.g. educational videos, MOOCs) and the knowledge of the institution (e.g. posters, official web pages); on the other hand, the branding guidelines of the University clearly communicate that only positive and aspirational messages should be promoted. Only a certain type of messages is therefore communicated. The issue of advancing and disseminating shared knowledge relates to the whole University, not only the marketing department, for example numerous restrictions are imposed on what may be made publically available and what cannot. Journal publication, for example, is considered a benchmark of academic quality, yet at the same time articles are mostly available only after paying a costly subscription.

'Satisfying the wants of whoever has the money to purchase the goods' is applicable to HE, because students who can afford to pay high tuition fees do not have to worry about the financial burden of personal debt after graduation, but the academic quality of applicants is still important (e.g. entry requirements) and those with a low income are supported by government loans. From the HE marketing point of view, this market value is reflected in investment in marketing campaigns, for instance. International marketing campaigns are supported by larger budgets then EU campaigns, because international students bring more money to the University.

The contrasting motivation of education, 'developing sound understanding, whether it is wanted or not', may also be viewed from a marketing perspective. Especially relevant here is marketing's preference for understanding the market's needs before developing programmes. The main problem with this logic is that students (the target audience) do not always know what they need in terms of education. Perhaps if they did know it, they would not need to go to university. Competitor analysis may be undertaken on whether close competitors offer a similar programme, or a prospective students' needs analysis undertaken on whether there is demand for certain programmes or on the words students use to talk about a programme so it may be appropriately named and understood by the audience. It is, however, difficult to undertake a 'societal analysis' on whether society needs people who understand certain issues and disciplines. This might be why academics prefer designing courses based on their knowledge and academic tradition, not on traditional market research.

The other theoretical aspect is the motivation of the market: 'buying or selling goods to anyone for whatever price one can get' is best understood when related to its educational counterpart of 'autonomous fulfilment of requirements'. McMurtry's (1991) idea is that money may provide external support for education to be delivered, but cannot ensure that students will understand the discipline. Here we might distinguish between acquiring education and the criteria for students to pass the course, and recruiting students and the criteria for students to be accepted. The marketing department does not influence either of these criteria.

The last theoretical point relates to standards of excellence. McMurtry (1991) says that the market aims for 'well-made to sell, problem-free product line', whereas education aims for 'disinterested and impartial representation and possessing deep and broad problems'. Well-designed courses from the marketing point of view are courses that the market demands. Well-communicated information, then, is the right information at the right time to the right students. The University says that 'marketing is not a promotion of lie, marketing is promotion of fact'. The communicated information, however, must support recruitment or the general positive reputation of the University. Information that is critical of the University is not communicated through marketing departments. In case negative information about the University appears in the media, the University tries to communicate factual information to the media to protect its reputation.

RQ3. Are the values of the University and Promotional services aligned?

The contrasts in single organisations holding both theoretical of market and educational values helped to answer the overarching RQ3. This section summarises the points developed in RQ3.1 and RQ3.2 and develops a discussion on the alliance of values of the University and the Promotional services.

The RQ3.1 and RQ3.2 talked of the points raised in RQ1 when describing the characteristics of the interaction of universities and promotional services. RQ1 identified four characteristic value statements shared across the organisations: 1) market research and 4P Marketing should be in the forefront when creating programmes, 2) Measurement is essential, 3) Marketing is important for universities to survive in the market, and 4) The mismatch between education and market values. The first three points relate to the operational function of the institution and the relationship. All participants share these operational issues. The last point, 'The mismatch between education and market values' is clear only after contrasting the theoretical values and the values of the participants.

Summary and discussion of RQ3.1 and RQ3.2 findings

Goals of the University, the Agency and the Portal

The first point about theoretical values concerns the goals of education and market. In theory, the goal of market is 'maximising private money profits' and the goal of education is 'to advance and disseminate shared knowledge. The RQ3 subquestions contrast the values of the University and the Promotional services with these theoretical goals. 'Maximising private money profits' is a goal not often discussed openly. The term 'for-profit' was used by none of the participants, and the word 'commercial' or 'business' was more accepted and used. The Portal, for example, presented the issue of earning money as being secondary to its main focus, on helping students to choose the right university. The Agency did not mention this issue at all, apart from pointing out its passion for business and ensuring growth. The University, on the other hand, stressed the need to make enough money for the University to thrive. The participants did not call this profit making but 'commercial thinking'. The University strategic document, however, clearly states that profitable activities are important. The University and the Portal are co-financed by public funding, while the Agency is a private organisation. The importance of earning enough money to continue and develop the business is therefore applicable to all organisations. The University was the most open about needing to be more commercial to survive, while the Portal kept most distant from this market value in its statements. However, this distance was then refuted by a number of contradicting statements, from which it was observed that profit is indeed important, even though the institution's philosophy was strongly focused on education and students.

The educational goal is 'advancing and disseminating shared knowledge'. In this sense, the Portal is proud to offer the opportunity to all universities to display their profiles free of charge and thus to disseminate the information about their institution. The information is also available free of charge to students. The Agency disseminates information only about paying clients. Meanwhile, the University disseminates information about the institution and educational content as such online lectures, and the marketing personnel of the University can influence only information on the University. In this sense, all institutions work to disseminate information and advance the knowledge and awareness of the prospective students of programmes. However, as will be discussed in the section concerning the last theoretical point on standards of excellence, such information does not always lead to critical knowledge, the theoretical aim of education.

Motivation of the University, the Agency and the Portal

The second theoretical point concerns the motivations of education and the market. Market motivation is to 'satisfy the wants of whoever has the money to purchase the goods that are wanted', and it is to be expected that the Promotional services follow this line; it would be surprising if they established conditions for universities that, if not met, meant they would not promote them. In fact, the only condition for the Agency seems to be having enough resources to pay for its services. Universities receive a basic listing with the Portal free of charge, therefore there are almost no conditions for universities (only that of their location). However, the University establishes conditions for the Promotional services' contracts (e.g. effectiveness of the campaigns, communication with the service) and for applicants to enrol on study programmes (e.g. A-level results, IELS test scores). Therefore, not everyone who can afford education may purchase education, although sufficient financial resources does make it more accessible.

The motivation of education is to 'develop sound understanding, whether it is wanted or not'. At first this point seems to be closely related to education (the process of learning). McMurtry (1991) says 'development of understanding is necessarily growth of cognitive capacity; whereas satisfaction of consumer wants involves neither, and typically impedes both'. Marketing-wise, this may then be related to the endeavour to develop study programmes based on market research. Such market research would look mainly at students' needs and wants. All participants support such activity. As reported by University participants, however, academics seem opposed to the idea of market research. Perhaps academics, similar to McMurtry (1991), believe that development of understanding is often counter to the satisfaction of wants and demands. A closer link between academics and marketing departments should be established. Marketing personnel often do not have the information (e.g. tightly specific course information) and experience (e.g. many years in academia, theoretical knowledge of HE) that academics have, although marketing knowledge may help academics develop programmes that are easily found by students and do not duplicate programmes of a neighbouring university.

Methods of the University, the Agency and the Portal

The third theoretical point concerns the methods of education and the market. The method of the market is to 'buy or sell the goods it has to offer to anyone for whatever price one can get'. This value applies to both Promotional services. As mentioned above, neither set criteria for universities to advertise with their service other than sufficient money and appropriate location, while everyone expects universities to set criteria for applicants other than financial. However, every university in the UK has both academic as well as financial criteria that vary from institution to institution. The University has chosen to increase its undergraduate tuition fees to £9000 in 2012/2013, and postgraduate tuition fees are usually £3700 for UK and European students and £12–15,000 for international students. The academic admission criteria then depend on the programme. Also, as mentioned above, the University requires the Promotional services to fulfil their criteria not only of price but quality of service (communication, advice and expertise, campaign effectiveness, etc). The method of education, 'to require of all who have it to fulfil its requirements autonomously', is therefore not exercised by the Promotional services but by the University. Within the University this relates to the method of the market, however, because price still plays a crucial role. This may be distinguished from criteria for acceptance onto a programme and criteria to pass it. The marketing department of the University cannot influence any of these, however they are applied to students to attract a specific type and may also be used as a marketing tool to attract more. The University mentioned an example of an institution able to recruit higher numbers of students because of the right advertising and the right use of admission criteria in that advertising.

Standards of excellence of the University, the Agency and the Portal

The last theoretical contradiction between education and market concerns standards of excellence. The market's standard of excellence is a 'well-made, problem-free product line'. While McMurtry (1991) believes that education can never be problem-free, his understanding relates to possessing deep and wide academic 'problems' or 'challenges', as distinct from operational problems (e.g. enrolment procedures, communication with tutors). The Promotional services do not challenge universities to learn new knowledge so, from this perspective, it does not apply. From the other perspective, however, they share the values of the market by working hard to give universities what they want and need, when they need it, in a way that is easiest for the client. However, the University marketing department has no influence over the academic content of programmes, although it should like to influence programme development in order to meet the needs of the market. It considers it important to offer well-supported and organised programmes and to provide students with the right information, in the right way at the right time. This therefore meets the condition for education excellence: 'disinterested and impartial information and possessing deep and broad problems'.

McMurtry (1991) blames marketing communications for making biased appeals to unconscious desires and says that education, by contrast, should make rigorous demands on people's reason. The Portal strives to provide accurate information on its platform, but the information is provided by universities and there is no better authority on this information than universities themselves. In order to complement the official information from universities, the Portal offers online space for students to write about their own experience. Prospective students can then compare the official information with this information provided by students, which may help them to develop a more balanced and 'disinterested' account of universities. The Agency promotes only information agreed with universities and believes that this can build students' experience of the university. While the University believes that marketing is 'not a promotion of a lie, marketing is promotion of the actual', when the University strategy and the marketing communication are analysed it becomes clear that only positive information or information that builds or protects reputation is promoted by the marketing and PR departments.

The University provides space for students to share their opinion through blogs and the students' union. However, difficult experiences are dealt with internally and are not promoted. One way to develop more balanced marketing communication might be to talk officially not only about the positive but the negative experiences of students and academics from a number of perspectives. That could help prospective students and the public to develop a more critical view of the University offer, which would follow the theoretical value of education. This will hardly happen, because of the University's need to protect its reputation and to attract sufficient students and other resources. It might provide space for students to discuss their issues and give mainly realistic information on long-term employment prospects or the other than extrinsic benefits of education. Third parties, such as the students' union, independent portals and government initiatives already develop communication that is critical about universities, and the University could discuss such initiatives openly.

RQ3 concluding summary

It was observed that some values of the University and the Promotional services are in alignment. It was also observed that it is difficult to position marketing as a discipline in McMurtry's (1991) theoretical argument. Moreover, the discussion uncovered a number of layers in education versus marketing values that were not considered by theory. This section summarises the findings and the alliance/non-alliance of the University's and Promotional services' values.

In practice, all organisations are dependent on generating income even though the Portal and the University are publically co-funded. Surprisingly, the University is the only organisation that talks openly about this aim, in its strategic document and in some of the interviews. The Portal, in the interviews, presents profit making as a secondary activity. The way this issue is avoided by the Agency and the Portal suggests that profit making is a problematic goal.

All organisations at some level aim to advance and disseminate shared knowledge. The Agency disseminates information about universities (paying clients), the Portal disseminates information about universities (paying and non-paying clients) and other information for and from students, and the University disseminates information to promote the institution but also to educate the audience (e.g. educational videos available free of charge online). The main problem with this theoretical point is that it does not distinguish between the nature of the information (e.g. educational information versus marketing information). Without reflecting on the nature of the information, it might be concluded that the University and the Promotional services share the goal of advancing and disseminating knowledge. The nature of the information, however, is crucial to evaluating HE marketing critically. The last theoretical value point –standards of excellence – addresses this issue.

Universities are not expected to satisfy the wants of whoever has the money to afford them, whereas the Promotional services are expected to do so and it would be considered surprising if the Promotional services had a set of challenging criteria on which universities to promote and which to refuse. Expectations were met and the University and the Promotional services differ in their motivation. Nevertheless, different layers of motivation may be identified within the University, because it has a number of different relationships (students, Promotional services, businesses). For each group of stakeholders there are different criteria, therefore the Promotional services are mainly expected to provide good service for a good price, whereas students are expected to develop understanding, whether wanted or not. The criteria for students to be accepted and to graduate may be distinguished from these conditions. No such criteria are imposed by the marketing department of the University, although admission criteria are important in promotional activity and may be used to attract specific students. There is an observable match between University participants and Promotional services participants in their desire to develop programmes based on market needs and wants, yet it is not clear how this would affect the University's expectations on students to develop independent understanding.

In practice, standards of excellence do not have to be mutually exclusive. It is important to distinguish between the support functions (e.g. IT, marketing, admission, hospitality) of the University and its educational function. Education, as McMurtry (1991) suggests, cannot be problem-free because students learn by resolving problems, but this does not mean that the University cannot aim to design a well-made and problem-free product line in the sense of programmes that are well designed and well communicated to students, to which it is simple for prospective students to apply and follow the administrative processes. This type of excellence is desired by all participating organisations.

All participating organisations officially promote only positive information about themselves, which does not help the audience to develop any deep and disinterested understanding; the Agency promotes only positive information about the client universities, and the University promotes only positive information about the institution, Only the Portal promotes both official information from paying and non-paying universities and students' opinions of the universities. The main reason for this is that the main aim of University marketing is to recruit students and the aim of the Agency is to help the University to do so. The Portal then shares the aim; however, it also aims to promote information from the students' perspective. The Portal provides this service because one of its great aims is to help students with their university choice. The reasons why the Portal can afford to provide such a service include being publically co-funded. The importance of financial motivation is also clearly visible in the University, which says that it is important for HE marketing not to be directly motivated by money (commission for enrolment). The importance of money is also clear from the interview with the Agency, when the participant did not want their child to be confused by marketing materials yet at the same time considered such materials good practice in HE marketing because it works to attract prospective students. Money, therefore, needs to be added to the list of Mechanisms – perhaps with the strongest weighting.

This chapter answered the research questions by contrasting the data with theories identified in the theoretical framework. The following chapter develops a broader discussion of the overall findings.

9. Discussion and conclusion

The thesis engages with both theoretical and practical problems relating to University's interaction with Promotional services, therefore it contributes to both theory and practice. To address the theoretical issues, first the IMP Interaction framework was re-developed to reflect the nature of the University and Promotional services relationship. Second, the theoretical values were examined and the traditional views that divide educational and market values were revisited. Consequently, to address the practical issues a number of recommendations for the University and the Promotional services were drawn from the research. This conclusion section discusses these main theoretical contributions and recommendations, engages with possible implications to practice and finally comments on the completed research journey that was guided by the CR philosophy.

9.1 Interaction between the University and the Promotional services – the re-developed IMP Interaction model

The IMP Interaction model provided a good initial understanding of the interaction between the supplier (the Promotional services) and customer (the University). In reality, however, the interaction between the University and the Promotional services is more complex than the IMP model suggested. Also, the environment of the original model was too closely linked to industrial markets, so did not capture the specific characteristics of the HE environment appropriately. The re-developed model (Figure 13) provides a more accurate representation of the interaction between the University and the Promotional services and the basic attributes of such interaction.

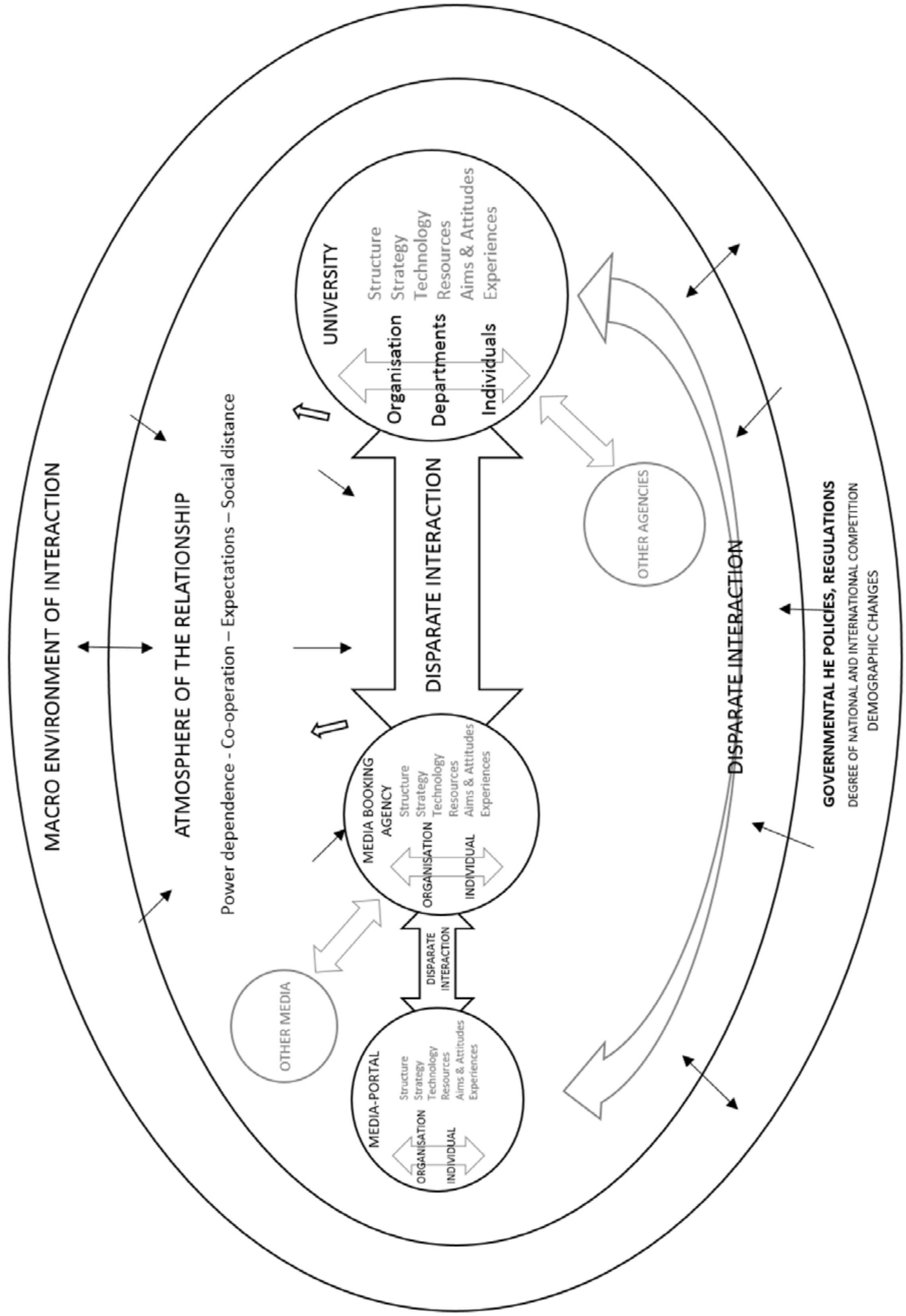

Figure 13. Model of the University–Promotional services interaction

The re-developed model still adopts the original distinction within the IMP Interaction theory between macro environment, atmosphere, interaction and interacting parties (the original model is presented in section 3.1., Figure 1). However, new attributes and complexity in the interaction were introduced into the model. Each attribute and its specific characteristics are discussed below.

9.1.1 Macro environment of the interaction

The macro environment of the original IMP Interaction model (Turnbull & Valla, 1986) was characterised by the market size structure and dynamism, degree of internationalisation, position in the manufacturing channel and social systems. The IMP Interaction environment is, therefore, strongly focused on the overall level of market stability, and the national and international networks influencing the interaction between the buyer and seller. Only the social systems concept mentions any other than inter-organisational factors. The IMP Interaction theory suggests that social systems represent the wider environment surrounding a particular relationship (e.g. international cultural differences, regulations, exchange rates) (Hakansson, 1982). The results of the present study suggest that such attributes are the most important environmental influences on the University and the Promotional services.

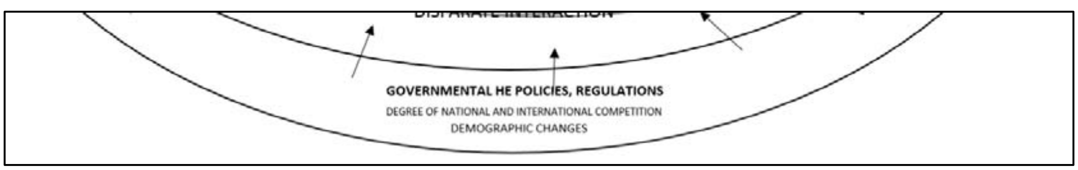

Figure 14. Environment of the University–Promotional services interaction

Figure 14 is a cut-out of the complete model of the University–Promotional services relationship and shows the environment of the interaction. The re-developed model adapted the terminology of the original IMP Interaction model better to reflect the University and Promotional services relationship. Therefore, instead of a generic social systems attribute, the new model uses the attribute of government HE policies and regulations. Such an attribute clearly reflects the specific environmental aspects that directly influence the University and the Promotional services.

Competition was also found to be an essential environmental influence, thus was added to the IMP's concept of the degree of internationalisation and a re-developed concept called the degree of national and international competition introduced. Moreover, a new attribute had to be added to represent demographic changes in the student body.

Government policies and HE regulations

Government policies and HE regulations seem to be the most influential attribute. They specifically include decreased public funding to HE, the increased cap on undergraduate tuition fees, various regulations on recruitment and visa restrictions. The participants felt that this environment is pushing marketing for HE towards business-like thinking more than ever before and that the importance of university marketing activities such as advertising in a range of media is higher than in the past. Halien's (1997) concept of critical events might be applied here. The increase in tuition fees and the consequent dip in recruitment numbers presented a critical event and was considered to be a 'wake-up call' for University marketing. The literature indicates that in 2013 the total number of applicants recovered somewhat from the depressed level of the previous year but 'remains 5.7 per cent lower than in 2010 before the introduction of the new fee regime' (ICOF, 2013, p. 3). Interestingly, most of the literature and the participants seem to be quite short-sighted when comparing student numbers. They usually make comparisons within a range of two to five years, and it is often forgotten that had been great expansion in HE, student numbers and institutions only two decades previously (post-1992 and 2004 institutions). It was only in the mid-1970s when HEIs recognised the possible importance of marketing activities (Smith, Scott, & Lynch, 1995) thus, when numbers of students in HE are comparably higher than ever before, it is curious to see how a relatively small dip in student numbers now causes a great level of stress, panic and action on the part of well-established university marketing departments. Such reaction is perhaps understandable, because the survival of the current university system, and with it a number of jobs, is at stake.

Another interesting discussion relating to changes in HE policies and their implications for recruitment revolves around the general responsibility of marketing personnel for student recruitment. Whereas in the 'business world' marketing personnel are often evaluated on the basis of sales, University MOs share this responsibility with academic staff and the 'whole organisation, and salaries are not usually based on commission. As one participant mentioned, commission-based salaries are not appropriate in HE because it makes people think about profit before students' good. Such claims made by University marketers challenge the idea that HE marketers believe market forces ought to drive modern HE (Gibbs, 2004). There are two problems with such claims. First, this research points out that marketers usually understand the concept of the 'market' from a marketing perspective, not from that of economic market (marketisation) theory. For marketing, there is a 'market' as long as there are customers willing and able to purchase the goods (AMA, 2014). Marketers, therefore, believe that market research and the needs of students should drive HE – this is what they were trained for and what they feel they know how to do. Nevertheless, they also understand that the needs of the economy and society are important, even though there is no clear indication of how to research these needs). Such thinking, therefore, does not align with economic market theory. Second, when thinking about marketing for HE and beliefs and practice of HE marketers, it is important to distinguish between the type and culture of specific institutions. Many universities that intensify their marketing activities and promotional materials often communicate simple and appealing messages to attract rather than to inform students (Gibbs & Murphy, 2009), nevertheless only a few universities have adopted highly aggressive market-oriented techniques such as commission-based salaries for student recruitment (Malik et al., 2014). Government policies and HE regulations, therefore, affect every institution differently and each adopts a specific approach. The studied University intensified its national and international marketing activities (and started to use promotional services more), increasing the pressure on marketers (but also academics) to recruit students.

Degree of national and international competition

The second attribute of the macro environment is the degree of national and international competition. This attribute draws on IMP concepts of market size, structure and dynamism, and degree of internationalisation. All these concepts concern interaction with other providers at a national or international level. The re-developed model terms this attribute 'the degree of national and international competition', because of marketers' understanding of such influences. Competition with other providers at a national and international level is an important factor for University marketing. As discussed in the literature review, universities use a number of strategies to understand the place of competition, for instance market segmentation, targeting, positioning or branding (Maringe & Gibbs, 2009). Promotional services such as specialised agencies, portals and international agents are then used to facilitate such activities. Universities choose agencies and media that are considered to be the most relevant for a certain target region. The criteria seem to be understanding the culture, the language of that region and having good contacts and connections with the target audience. The importance of such specific knowledge increases with the growing numbers of international students and the growing profitability of international markets (Altbach, 2004).

Demographic changes

Increasing numbers of international students also relate to the last attribute of the re-developed university–promotional services interaction model, *demographic changes.* These were not mentioned in the original IMP Interaction model, but play an essential role in University student recruitment. In marketing, demographics is usually associated with market segments. Demographic measures such as age, gender, place of residence, education, ethnicity and income (Field, 1999) may characterise a chosen market segment and also influence university recruitment. For example, after introducing the £9000 fee cap there was a drop in mature students' recruitment (ICOF, 2013). The direction of the environmental influence is therefore important.

Direction of environmental influence

The last development of the University–Promotional services model relates to the direction of the environmental influence. The original IMP Interaction model shows one-directional arrows signifying that the macro environment influences the *atmosphere* of the interaction and ultimately the *interaction*. This corresponds with the participants' feeling that they are influenced by the environment (e.g. the government policies and the demographic makeup that impact universities' recruitment). However, the University as an institution is also capable of influencing the environment. For example, as mentioned above, the demographic structure may be influenced by targeting and educating specific segments of the population, or price strategies may influence future government policies on HE tuition fees cap. Some of the research-intensive universities are already talking about the need to abolish the £9000 tuition fees cap because they believe that the '£9,000 limit poses a threat to quality and income' (Morgan, 2013). Professor Andrew Hamilton, the

Vice-Chancellor of the University of Oxford, commented that 'the idea of a market (and that is what is ostensibly being created) in which every item, virtually regardless of content and quality, is the same price seems, well, a little odd' (Oxford, 2013).

In summary, the re-developed environment of the IMP Interaction model features three main attributes, in order of importance: government HE policies and regulations (in the IMP model this was loosely attributed to social systems), the degree of national and international competition, and demographic changes. The environment strongly influences the university–promotional services atmosphere, interaction and interacting parties, but the interacting parties also have the power to influence the environment. This is different from the original IMP model in a number of ways. Firstly, the environment of the IMP model (Hakasson & Wootz, 1979) heavily emphasised interorganisational dynamisms and structures and underestimated the role of governmental regulations. The re-developed model on the other hand recognises governmental regulations as one of the most important attributes influencing the interaction between the University and Promotional services. Secondly, the original IMP model featured only one directional arrows coming from the environment to the atmosphere of the relationship, suggesting that the environment influences the atmosphere and the interaction, but the interaction does not influence the environment. The re-developed model challenges this assumption which is symbolised by both-directional arrows leading from the environment to the atmosphere. And thirdly, the new model features a new attribute called 'demographic changes'. This attribute seems to be difficult to measure, but important in terms of students' recruitment and related promotional campaigns. These developments make the new model suitable for understanding the University-Promotional services interaction.

9.1.2 Atmosphere of the relationship

The IMP characteristics of the atmosphere between the buyer and seller were reasonably accurate and captured the atmosphere between the University and the Promotional services well. The re-developed model, therefore, represents the concepts of power dependence, cooperation, expectation and social distance in the same way as the original model (Figure 15). The research, however, contributes to our understanding of the University–Promotional services relationship by identifying features of the atmosphere specific to such interaction.

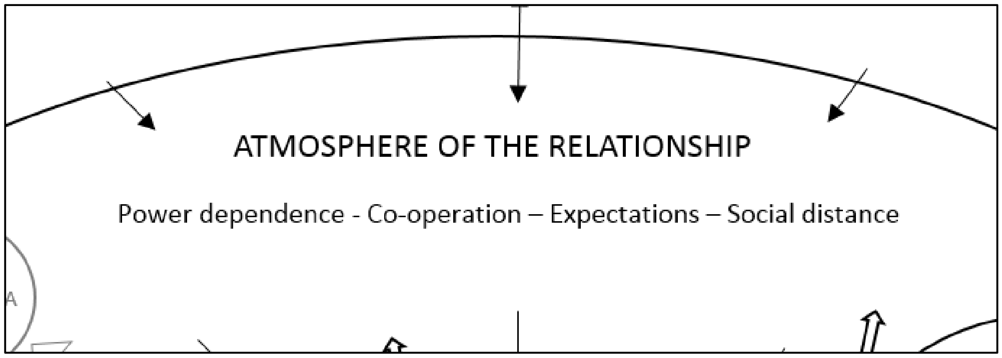

Figure 15. Atmosphere of the University–Promotional services interaction

The power dependence concept reflects mainly the Agency's need for clients (such as the University), and the University's power to employ or dismiss the Agency. The University is in some way also dependent on the Agency, because it is the Agency that closes the deal between the University and the media. The Portal is partly dependent on the Agency to close the deal and partly to recommend its services to universities. The literature says that power is determined by the dependence of two or more actors, and dependence is higher when there are limited alternative resources (Dwyer et al., 1987). In this case, there are many alternative universities with which the Agency could work, nevertheless the resources invested in uncertain tendering for a new contract are high (Turnbull, Ford, & Cunningham, 1996), so keeping and nurturing existing contracts is essential to the Agency. It aims to meet the needs of the University and to keep the client as satisfied as possible. This corresponds to the notion of 'the customer is always right', highly contested when it comes to students as customers (Molesworth et al., 2011) but rarely discussed in relation to universities as customers (Dippo, 2005; Fernandez-Esquinas & Pinto, 2011).

Cooperation is another attribute of the interaction atmosphere. As demonstrated by this and other research, cooperation is affected by a number of factors such as trust (Dwyer et al., 1987), inter-organisational technology application and communication (Bensaou, 1997). This research has demonstrated that, even when factors affecting cooperation are not perfectly functional, it is possible to maintain some level of cooperation. Even though the University holds various opinions on the work of the Promotional services and the Promotional services have had various experiences with the University or with each other, in the end what matters is finalising and implementing the advertising campaign.

Another attribute of the environment is expectations. To some, it goes without saying that the expectations of the interaction parties influence the atmosphere of the relationship. This was clearly demonstrated by the participants' responses. IMP theory, however, does not mention the high interrelatedness of the expectations concept and other attributes of the model, for example the relationship between expectations and social distance. If there is a great social distance (especially distance in understanding each other's ways of working, aims and attitudes), expectations will be unrealistic and the atmosphere of the relationship will be affected in a negative way. As Campbell (1997, p. 7) says, 'social bonds strengthen expectations of mutuality in interfirm relationships'.

Halien (1997) points out that the expected outcomes of an assignment process and the expected outcomes of the business relationship are important for understanding the agency–client relationship. For instance, some University participants reported that they expected the Agency to provide more services and that their expectations were not fulfilled. One of the reasons for this disappointment was insufficient knowledge of the contract and the services the Agency could deliver, partially caused by interdepartmental disconnectedness and miscommunication within the University. This clearly affects the relationship negatively, as 'interdepartmental connectedness within the firm strengthen expectations of mutuality in interfirm relationships' (Campbell, 1997, p. 5).

The high sensitivity of the atmosphere environment was also confirmed. IMP theory says that a change in even a single variable (e.g. change of contact person for one of the interacting parties) may provoke change in the atmosphere of the relationship. In a positive direction, atmosphere develops only slowly and gradually. In the negative direction, however, change sets in much faster (Hakansson, 1982). This was the case, for example, when the negative results of just one campaign affected MOs' trust in the Agency's recommendations.

In summary, the IMP Interaction theory captures the basic attributes of the interaction atmosphere (power dependence, cooperation, expectations and social distance) well. Power lies mainly with the University as a client, while the Agency has certain power over the Portal. A level of cooperation is thus essential for the whole relationship to function. The main difference between the atmosphere of the original IMP model (Hakasson & Wootz, 1979) and the re-developed model is the understanding of the high interrelatedness of the expectation attribute and other atmosphere attributes. For example, the expectations of the University MOs influence the social distance (understanding and shared ways of working) between the University and the Promotional services, which can lead to a disparate interaction process. This understanding contributes to better conceptualisation of the relationship between the University and Promotional services. The re-developed model also adds Halien's (1997) concept of outcomes of the assignment process to the atmosphere level and suggests that the attributes of the atmosphere are present also within the interaction parties (and not only in the outer atmosphere layer of the interaction parties).

9.1.3 Disparate interaction process

The IMP Interaction model has provided a basic understanding of the interaction processes. However, it does not account for a complexity of relationships within and outside of the main interaction. The IMP group has developed a new model that deals with complexity of relationship environment, the ARA model (actors, resources, activities) (Axelsson, 2010). This might be applied to the present research by considering the University to be the Actor who carries out Activities (such as advertising study programmes) and needs Resources (designing the advertisement or information and a fast access to media). In order to obtain such resources, the University uses the Agency, the Portal and a number of other promotional service providers.

Such an understanding of inter-organisational relationships is, however, rather shallow. The re-developed model does not display the interior-organisational relationships at the environment but at the interaction level, where it is obvious that all actors are influenced and may influence the environment and the atmosphere, all actors have a complex structure as the main interacting parties and possess specific resources to develop specific activities. This representation allows for understanding the complexity of business interactions (Figure 16).

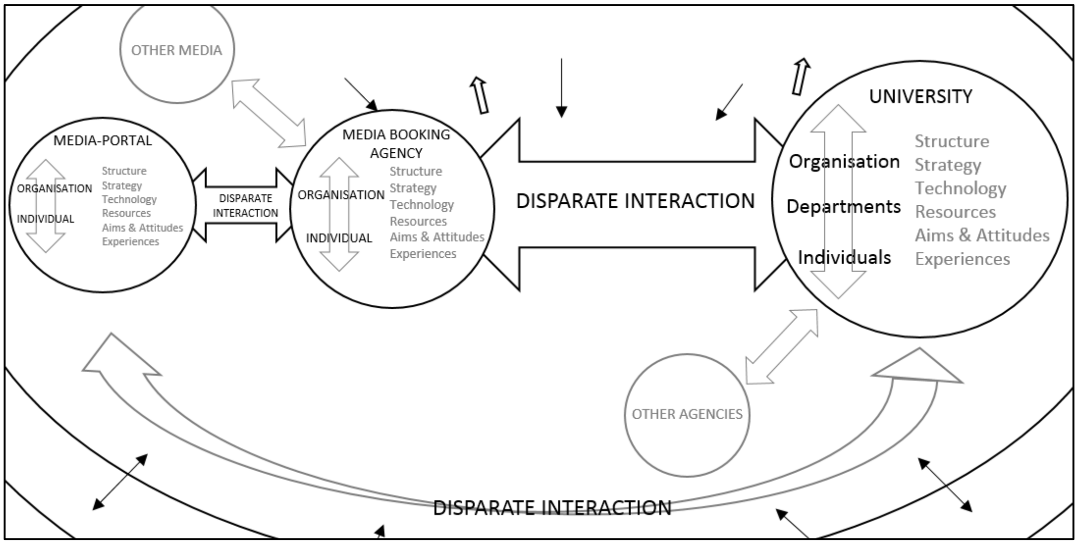

Figure 16. Interaction process and interacting parties of the University–Promotional services interaction

The original IMP Interaction model says that organisations may engage in services exchange, information exchange, financial and social exchange. The University and the Promotional services engage in all these exchange processes. The IMP Interaction model also talks about institutionalisation and adaptation (Hakansson, 1982). When a relationship becomes institutionalised it means that both parties already have clearly aligned expectations and responsibilities for the relationship. In the case of the University and the Promotional services, a certain level of institutionalisation has been achieved, however such institutionalisation was observed only between the Agency and Corporate Services. In the case of the faculties, institutionalisation was not achieved. Similarly, relationships with the Portal are complex. The Agency mediates the relationship between the University and the Portal. Because the relationship between the Agency and the Portal is not institutionalised (e.g. different understanding and practice of measurement and statistics), it is impossible to institutionalise the relationship between the University and the Portal. The IMP model does not account for such complex interactions, and the complexity does not finish here. As mentioned above, **there are often other agencies included in the implementation of a campaign**. Other agencies or individual contractors (e.g. PR agencies, design agencies, copywriters) have direct interaction with the University. The University submits design work to the Agency and the Agency books the media (the Portal or other media) and places the advertisement.

Adaptation happens when one or another party makes changes to the elements of exchange or exchange process in favour of the relationship. It is important, because it tends to bond the interacting parties and create barriers to entry for competing suppliers (Wilson & Clemens, 1995). Adaptation occurs in the University–Promotional services relationship. As an example, the Agency modified its team size to suit the University's requirements and started to provide it with a monthly report. The University, in turn, adapted some of its working processes, for instance some people started to use the Agency's campaign brief. Likewise, the Portal says that it always tries to adapt and to respond to universities' and agencies' needs. Adaptation could therefore be viewed without controversy, but if we look deeper into this issue we see, for example, that the Agency's team size is not always sufficient, not everyone at the University receives its report and not everyone at the Agency is satisfied with all the services provided by the Portal. Disparateness, therefore, is reflected in every aspect of the interaction process.

Halien's (1997) interaction styles are also relevant here. Interaction styles are characterised by openness of communication (such openness is concerned, for example, with the discussion of goals, strategies and plans, feedback about the relationship or of roles and positions), formality of control (such as the existence of a written explicit contract or giving strictly defined briefs) and investment initiatives (such as making suggestions for client's marketing or motivating the team to make proposals for new assignments). Halien (1997) points out that openness in communication and investment initiatives is particularly important in understanding the agency–client interaction.

All these theoretical interaction styles have proved important, but again are strongly disparate within the University–Promotional services relationship. For example, the openness of communication has proved to be challenging within the organisations (mainly in the University), not only between them. **The re-developed model, therefore, shows interaction arrows within the interacting parties as well as between them.** The disparity and other characteristics of the interaction processes are equally applicable within the organisations. The communication within the organisation (e.g. within the University MOs and Corporate Services) and between the organisations then influences the atmosphere of the relationship. For instance, there is a connection between investment initiatives and openness of communication. This is demonstrated in both the Agency's and the University's wanting the other party to be more proactive and less reactive but not communicating this issue sufficiently to each other, widening the social distance between them.

In summary, the research contributed to the theory by understanding the complexity of the interaction process, not only between organisations (a number of agencies and providers) but within the organisations (a number of departments, opinions and ways of working). In the case of the University and Promotional services, this resulted in incomplete institutionalisation and adaptation. Institutionalisation was achieved only between the Agency and Corporate Services, and not between the Agency and the University MOs. One reason for such a situation to exist is the complex communication within the University. In this a situation, adaptation of the interaction parties proves difficult. There are therefore four main differences between the interaction of the original IMP model (Hakasson & Wootz, 1979) and the re-developed model of the University-Promotional services interaction. First, the interaction is now called 'disparate interaction' which more precisely captures the nature of the relationship. Second, new interacting parties were introduced into the model. Namely 'other media' and 'other agencies'. Displaying other actors in the interaction level makes it visible that other parties with more or less complex structures can influence the interaction between the main parties. The original model failed to display such complexity. Third, Halien's (1997) concept of 'interaction styles' such as the openness in communication and investment initiatives were added to the interaction level. And finally, as will be also discussed in the following section, the interaction arrows were embedded within the interaction parties to demonstrate the level of internal disparate interaction.

9.1.4 Interacting parties

As mentioned and shown above (Figure 16), **the re-developed model shows the interaction arrows within the interacting parties as well as between the parties**. The internal interaction element is important for all parties.

However, as the research revealed, the University has especially complicated internal relationship structures. Not only do individuals interact with the organisation but individuals with departments, and departments with other departments (e.g. the marketing department with academics). The internal interaction is complex and often conflictive, which influences external interaction (e.g. academics booking media without letting the Agency know, then MOs having to inform the Agency and communicate with other promotional services to develop the design of the campaign). Therefore, as mentioned above, the attributes of the interaction of atmosphere, such as the social distance, are relevant to the interacting parties. Such findings correspond with organisational literature that suggests that distinct subcultures are formed around professional groupings. Yates (1985), for example, says that such isolated professionalism is likely to raise the level of conflict. The members of professional groups are often committed to their profession over and above the organisation that currently employs them (Alvesson & Berg, 1992, in Allen et al., 2002). This research indicates that each of these groups (in this case academics and marketers) uses its own language, and 'jargon both facilitates communication within the field but also makes the knowledge being communicated appear to be more substantial and more difficult than it really is' (Pfeffer, 1981, p. 114).

Nevertheless, only marketing personnel were interviewed who described the difficulties related to working with academics. It was out of the scope of this study to talk to academics. The present discussion, therefore, uses literature to support this argument. There is a vast body of literature that looks at the changing culture of higher education. The literature for example discusses the change from collegial style of running schools and departments to managerial style. This change arguably undermines the authority of academics and gives more power to administrators who now compete with academics for status (Deem & Brehony, 2005; Kinman & Jones, 2004; Kolsaker, 2008; McInnis, 2010; Schulz, 2013). In many cases this transition has been incomplete and forced, 'giving rise to complex hybrid models of executive and committee systems' (Kolsaker, 2008, p. 515). This is the case at the University under study, with marketing specialists hired to introduce marketing thinking and structures, clashing with traditional structures and ways of working. This resulted not only in hybrid structures but a conflictive environment where marketers feel they are not properly incorporated into the University structure, perhaps because academics think that marketers do not fully understand the nature of academia and lack the specific knowledge required to design a study programme (a product). The literature also suggests that academics often feel that marketers are pushing the University towards business thinking which is not appropriate for HE (Gibbs, 2004). A similar tendency was found in outsourcing ICT services in universities. Allen et al. (2002) say that academics use academic discourse to protect their interests and power, while IT professionals, who are becoming an increasingly powerful force within HEI, control the resources and language of technology. Other literature suggests that the conflict might vary depending on the type of institution. Academics from prestigious institutions believe that there is no need for marketing and marketing should not be used because it goes against the basic values of HE, whereas academics from newer universities attach higher level of importance to marketing (Oplatka 2009). Also some academics appear to be for academics involvement in marketing and others against. Oplatka's (2009) research suggest that one of the reasons for such aversion is academics' narrow definition of marketing (they define marketing as persuasion, glossing and commercial/business tactics). This suggests that there is a conflict between academics and marketers when the activity of marketing department goes against what academics consider to be in line with the spirit of academic world. This supports the notion of conflict identified in this thesis. Even though the interviewed marketers understood the specific nature of HE products, they still said that now they have to put their 'business hats on' otherwise the university would not survive.

The re-developed model represents this difficult internal interaction with a bi-directional arrow within the interacting parties. Such interaction parties represent an organisational microcosm with similar characteristics of external interaction process, atmosphere and environment.

All the other attributes of the IMP Interaction parties are relevant to the University and the Promotional services: structure, strategy, technology, resources, aims, attitudes and experiences, yet specific attributes are crucial to different interacting parties. The Portal has a characteristic of attitudes towards students, for example. Students are presented as the highest interest of the Portal and direct communication with students is established in various forms (e.g. communicating the advertisements of universities to students, publishing their reviews or presenting to them personally). Resources are another important attribute that characterises it. The Portal is not only financed by the universities' advertisements but publically co-financed by government. The technology element is important to its interaction with the Agency (the Portal wants to help the Agency with measuring, but the Agency has problems with its measurement system). This might relate to the Portal's communication strategy, another attribute of the interacting parties. The Agency feels that often it communicates with sales representatives, not digital representatives, so its measurement needs are not addressed. **The relationship between the attributes** is visible here (e.g. the relationship between strategy and technology).

The Agency's most prevalent attributes are technology, strategy, structure, resources and aims/attitudes. In terms of technology, measurement issues with the Portal and the University are dominant. In terms of strategy it is interesting to look at how the Agency presents its pricing system (e.g. using the term 'rebate'). Structure-wise, the team size of the Agency is crucial to meet the needs of the University, which is different from the Agency's other clients. Its financial resources are then based on the profit it makes, not on public funding. The aims and attitudes of the Agency are consistent at the organisational level (to work well with the client, with a passion for the business), however quite complicated at an individual level (e.g. the perspective on what is a good marketing practice changes if participant talks as a mother or as a marketer).

For the University, structure is a dominant attribute. As mentioned above, its structure is complicated and a number of different groups interact and clash. In general **there seems to be more tension within the University than between the organisations**. The University has a hybrid and conflictive interaction structure and each department (and some individuals) have different knowledge of the Agency. Corporate Services has more knowledge and a closer relationship with the Agency than the faculties' MOs. There is also a degree of a collision between marketers and academics, and a high level of difference within the organisation (e.g. some MOs use and are very happy with the Portal, while others do not know much about it or do not find it strategically essential). This is because, even though the University has an overarching strategy, every faculty and school has its own version. Outsourcing promotional services seems to be an important part of the University marketing strategy. The literature suggests that the main reasons for outsourcing are reducing cost, improving company focus, gaining capabilities, freeing up resources for other purposes, obtaining resources not available internally, accelerating reengineering, freeing themselves from a function that is difficult to manage and sharing risk (Palm, 2001). In reality, however, it is not possible to generalise about the outsourcing benefits. Some MOs, for example, use the Agency as prescribed by the contract; others, prefer to negotiate with media directly (therefore time saving is not achieved). Also, nobody from the University was able to say whether financial savings were achieved by using the Agency. It was confirmed that there is little evidence for savings (KPMG, 2009). Most of the other benefits of outsourcing were contested by individual approaches by MOs or Corporate Services. On the other hand, the picture of outsourcing (in this case only promotional services) seems to be much less tragic than some literature suggests. Even though there does seem to be a problem with savings (Jefferys, 2012), lower levels of job satisfaction, higher stress (Huws, 2012), loss of knowledge (Deloittes, 2005) and partial loss of power (Allen et al., 2002), the research proves clearly that every outsourcing contract is specific. Moreover, within the contract different operations may have a different impact on individuals and individual campaigns and, in turn, individuals have different understandings, expectations, impact and satisfaction. In general, outsourcing in HE tends to be conflictive when it reinforces managerial cultural values (Allen et al., 2002). However, in the case of this research it was not the outsourcing contract that reinforced managerial culture, because the operational values of the Promotional service and the markets of the University were aligned; the conflict was within the University (marketers versus academics), not between the University as a whole and its outsourced services.

The University's technology aspect might again relate to measuring activities. While some departments measure click through via Google Analytics, the University (mainly Corporate Services) sometimes buys statistics from the Agency and users are able to receive statistics directly from the Portal. Many University participants should like to measure the enrolment effect of campaigns, but at the moment there is no system in place to make such measurements. Also, the marketing department is not always interlinked with the admission department. As the Promotional services suggest, there is a big difference in the use of technology (such as Google Analytics and Google DoubleCliks), not only between universities and businesses but between different universities. The Portal, for example, mentioned that some of their clients are able to measure the conversion from Portal's click through to enrolment, unlike some other clients who are only just starting online marketing and measurement. The role of the Promotional services, therefore, is not only to help universities with media booking and advertising but with comparing and understanding the competition. As the Agency says, new universities are much more advanced, because that is what they have always had to do. However, the University is mainly interested in what other research-oriented universities are undertaking, which suggests that, even though post-1992 and 2004 universities increasingly compete with traditional research universities by developing their own research programmes (Ashwin, 2006), traditional research universities still feel that the competition is mainly from within their own group.

Another attribute of the re-developed University–Promotional services model relates to the financial resources. The University is open when it comes to talking about its resources. Both the participants and the documents (such as the University strategy) say that it seeks both public and private funding. The University is under the watchful eye of the UK and EU regulations on public spending so, for example, when the cost of a tender for an external marketing service exceeds a threshold defined by the government, universities have to run a public tender process under UK and EU regulations in order to contract the most economically advantageous supplier or the supplier that offers the lowest price (Achilles, 2014; Out-Law, 2014). The research shows that even these thorough procedures do not always result in an apparent financial or economic benefit.

The attributes of values and attitudes play an essential role in this thesis. Section 9.2 discusses the issue of values in depth. On this point, when re-evaluating the IMP Interaction model it may be seen that the values and attitudes of the University and Promotional services marketers are mostly shared at the operational level (e.g. work well with the Promotional services, raise the profile of the University), but are rather complicated and mixed at individual level (e.g. for some MOs, having to think in a more business-like fashion is disappointing). Operational values seem essential in working with promotional services, even if conflict between personal and professional values occurs. After all, this is common (Comartin & Gonzalez-Predes, 2011) and to produce a promotional campaign is the essence of the HE marketers' job.

Another important attribute for the University is experiences, for example past behaviours and habits – the University has not used an agency before. The attribute also relates to the education and practice of the University marketers. This corresponds to literature that indicates that factors such as age, education, sales-related knowledge or product knowledge play a role in marketers' performance (Weitz, 1981). Many of the participants are from a marketing background (education or previous job), so have a theoretical and practical idea of what marketing should be about. This clashes with practice at the University, where its main responsibility is promotion, and there is a difficult and conflictive relationship with academics. Even though University marketers have never had an essential role in programme creation or market research, they feel that they should be part of the bigger picture and influence the programme development and the market research much more.

In summary, the research found that all original IMP attributes of the interaction parties (structure, strategy, technology, resources, aims, attitudes and experiences) are important to the interaction between the University and the Promotional services, and that there is more tension within the interaction parties than between them. One reason for this is the highly stratified structure of the University. The contribution of this research therefore lies in stressing the applicability of the attributes, originally related only to the atmosphere and the interaction, to the interaction parties. Also, similarly to the atmosphere level, there is a clear relationship between attributes. For example, there is a relationship between experiences (e.g. marketing versus academic education and/or practice) and expectations (e.g. the involvement of marketers in product/programme development). Organisational literature considers similarly incoherent organisations to be 'schizoid' or 'hybrid'. Schizoid organisations are characterised by tension between two contradictory sets of ideas and values (Greenwood & Hinings, 1988). In this research, the contradictions between education and market values/academics and marketers was discussed and analysed.

9.2 Education and market values revised

The list of values developed by McMurtry (1991) was a helpful springboard for researching the University's and Promotional services' values. However, the analysis of the collected interviews and documents confirmed concerns with McMurtry's theory of education and market values that were overshadowed in the theoretical review chapter. Firstly, the theoretical values drafted by McMurtry are highly **idealised**. In reality, every institution or even every person has a number of goals, motivations, methods of achieving such goals and methods of measuring standards of excellence. For example, the University aims both at increasing the criticality of students and financial sustainability, or, for instance, the University has admission criteria based on academic skills, yet students cannot study if they are unable to pay their tuition fees. Of course, even here there are exceptions, such as cases where universities do not awaken criticality in students' thinking because of financial pressures (e.g. the pressure to deliver the goods the student paid for). There are certainly cases of academically excellent but not financially well-off students who receive bursaries and scholarships, but this only confirms the complicated nature of HE.

Moreover, each value can be **viewed from a number of different perspectives**. For example 'developing sound understanding, whether it is wanted or not', can actually be a market value because, with detailed market research, marketers can tailor a message to potential customers so that they understand it, whether they want it or not. Another example is the aim to 'advance and disseminate shared knowledge'; in fact, all participating institutions aim to advance and disseminate shared knowledge. The Portal, for example, aims to inform students about the wealth of study programmes and not only lists information about programmes but creates and shares new knowledge produced by students (in student forums). The University as a whole and University marketing staff aim to share academic knowledge, for example, through free online lectures or PR material, and at the same time the University aims to inform students about its offers in order to recruit**. The nature of the disseminated knowledge is therefore important**, because such knowledge does not always lead to critical understanding.

Also, the concern about **the absence of a strict binary divide** between the values of education and market was confirmed. In reality, the values of education and the economic market may be interlinked. For example, market excellence such as developing a problem-free study programme – in the sense of problem-free admission, communication and study equipment – may relate to educational excellence – teaching students to think critically in a well-equipped classroom. Another example of the value of interconnectedness is the relationship between 'maximising private money profits' and 'advancing and disseminating shared knowledge'. The income of the Portal, for example, consists of what universities pay for advertising and also of government support. Combining these income streams allows the Portal to aim at disseminating a wide range of information to students.

It might be concluded that such binary values are attractive for their straight applicability and possible judgements, but they are also fallible because absolute polarity does not exist. This research found a mixture of values not only within the organisations but within individuals, where role conflict was apparent between, for example, a former student who wants to do the best for other students and a project developer responsible for the sales of the service. It seems that the bottom line of such dilemmas is **personal character** ('If I felt that personally I mis-sold it to see that student to come, it's time for me to walk away' U/DI), **power relationships** ('We can advise, but ultimately they are the client so we have to work the way that they want to work' A/AD) **and money** ('the University of course is very keen on a significant percentage of international students, they pay higher fees and a lot of money has always been going towards promoting to them' U/MO1). Another important concern relating to McMurtry's (1991) set of values is their applicability to HE marketing.

9.2.1 How do education and market values relate to marketing for HE

The issue of the unclear relationship of the market and education values to HE marketing relates to its conflictive nature and unclear location both practically, within the structure of the University, and theoretically, within the economic market and education discipline. Marketing for HE combines both marketing (and related economic market logic and values) and education (and related educational values). As presented in the literature and theoretical review, there is much discussion of problems relating to applying business marketing techniques to education. The main claims revolve around the argument that marketing is selling education by strategic business techniques and thus harming the 'pure' nature of education and its students (Clayson & Haley, 2005). Such claims are usually derived from analysing selected promotional materials, theorising about the current HE market or researching students' expectations versus experiences. A study that looked at HE marketers' opinions suggested that marketers are driven by market forces and support the market culture (Gibbs, 2004). The results of the present research, however, suggest that the values of HE marketers are more complex. They are often anxious about the changes towards the economic market and business culture and see marketing as a tool to help universities survive in such environment, and when they talk about 'market' they often mean 'market' in marketing terms, not 'market' in economic theory terms.

Gibbs (2004, p. 51) also indicates that 'marketers envision higher education marketing as advertising and promotion and see their role in promoting higher education as a commodity in an environment that is one of consumerism'. However, the marketers interviewed in the present study did not envision HE marketing only as advertising and promotion. As Gibbs (2004) suggests, advertising and promotion is the scope of HE marketers' work. Nevertheless, this study showed that the wish and plan of the interviewed marketers is to be involved in all the 4P marketing activities (product, price, place and promotion). At present most had neither influence over product, price or place, nor over the admission criteria, and often they undertake no market research prior to or during programme delivery. When for example Gibbs and Murphy (2009) suggest that marketing for HE should be aligned with the vision of the university, it is not clear who is finally responsible for this alignment.

Also from the perspective of the McMurtry's (1991) theory, all values are somehow applicable to HE marketers because they are connected to the whole University. Nevertheless, they can influence the University in its entirety in almost no way that relates to the values identified by McMurtry. The only relevant value is the **dissemination of information, which should be disinterested and impartial**. Even with this value, however, we come back to the problem represented by the mechanisms identified above – money, power relationships and personal character.

As mentioned above, market research is often conducted by academics or is not conducted at all. Programmes are developed by academics, and marketers are not consulted. The programmes are then brought to the MOs who are asked to promote it in order to recruit students. The involvement of the academic staff does not end here, because academics are usually consulted before a campaign is published. Academics approve the text (they often also write the text) and approve the visual work. There may be variations of this process when marketers occasionally have some influence over the product development or market research, but these are exceptions. There is, therefore, a power relationship between academics and marketers. Despite this, some marketers' personal character makes them feel responsible for recruitment to such a programme, or other marketers' character may lead to the opposite: 'If you want me to be responsible for this side of thing, than you put me upfront and you listen to views and opinions on what to be putting out in the first place' (U/SMM).

What then characterises marketing for HE and what might its values might be? It is not easy to suggest a set of values, because marketing for HE is conditioned by a number of mechanisms such as power relationships, the complex structure of the University and competition. Nevertheless, on the basis of this research it might be suggested that the following goals, motivations, methods and standards of excellence could represent a **'realistic values of marketing for HE'**. Each value consists of two parts; the first represents the desired end state and the second is a reminder of what needs to be considered when trying to achieve such an end state.

Goal

Meeting the needs of students, economy and society

(Even though we know that students do not always know what they need, it is difficult to know what the needs of society and economy are, and practising societal marketing[1] in a marketising environment is challenging.)

Motivation

Well-designed and communicated study programmes

[1] Societal marketing: satisfying customers' needs and wants in a way that preserves or enhances consumer and society well-being (Kotler, 2001).

(Even though there is not always straightforward cooperation between the academics who usually design the course and marketing departments who usually promote the course.)

Method
Engaged effort of academic and marketing departments to cooperate and develop ethical[2] marketing activities
(Even though world views often vary and time is scarce.)

Standards of excellence
(Knowledgeable and well-informed students who understand that education is not only about personal satisfaction and job acquisition, but academic challenges that might be dissatisfying in the short run, but valuable for life.)
(Even though this is difficult to measure and quantify, and employment of graduates is important.)

In order for such values to be embedded in universities, an active approach by both university marketers and university policy makers is needed.

9.3 Recommendations for practitioners

So far, the thesis has suggested a number of theoretical redevelopments and recommendations. The research, however, also makes a number of recommendations for practitioners. Such recommendations may be divided into those for marketers and those for managers. Marketers are considered to be the MOs' operation at faculty level, Corporate Services of the University and the team working for the Promotional services. Managers, in this study, are considered to be people with overarching power to influence policies and regulations of the institution (e.g. the University's chancellors and deans). These two separate groups of recommendations are needed because the first

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[2] Ethical marketing for HE: universities' marketing practice aligned with the mission and vision of the university and specific attention paid to the vulnerability of new entrants in higher education, the length of time taken out to study, the veracity of estimates of the return of investment in higher education, and the degree to which students might be transformed by education (Gibbs & Murphy, 2009).

does not need intervention at an organisational policy level, whereas the second does.

Recommendation for marketers

When making recommendations for marketers, it should be remembered that research cannot prove that such recommendations would lead to a better working environment. Nevertheless, the research has uncovered a number of issues that could be addressed in the following way.

First, communication between the Agency and the University suffers from the highly stratified structure of the University. One of the practical implications is the issue relating to the Agency's report for the University; it provides one, but not everyone receives it. Another problem for some MOs is that they should like to know what other faculties are doing with the Agency, but do not have access to this information. One possible solution could be an online system where Agency reports could be stored and the promotional activity of each school or faculty could be recorded. This could help marketers to access the information. However, as mentioned above, it is not clear if this solution would resolve the problems. The main reason for scepticism is that already there are too many reports, emails, newsletters and other sources of information. The problem is often not a lack of information but of time and organisation of such information, so developing an online system for communication between the University and the Agency might only result in another administrative burden.

Another practical problem experienced by the University MOs was the disparate understanding of the contract with the Agency. While Corporate Services has in general quite a realistic expectation and understanding of the contract, some MOs say that their expectations were higher because they were informed that the Agency could do more for them. Others say that they were not informed about specific aspects of the contract, and yet others that they were well informed. Such disparity in the answers was typical for the University. From this it follows that better communication is needed between Corporate Services and the MOs. It is, however, not clear how such communication could be administered. At the moment the University marketing team has a structure indicating that good communication is possible (Corporate Services is linked to the faculties' MOs via marketing managers). Further research would need to identify ways of closing some of the information gaps.

On the other hand, the practical problems concerning the work of the Portal with the Agency relate mainly to the system of measuring effectiveness. One possible solution to such issues between them is to allow a digital representative of the Portal to communicate with an Agency digital representative, as the Agency says that sometimes it talks to sales representatives who do not know about measurement systems. Another recommendation for the Portal would be to ensure that everyone understands the Portal's target group, because at the moment many of the University and in addition the Agency participants understand that the Portal promotes to a narrow target group, whereas in fact the actual target group of the Portal is much wider. There are also significant differences between University participants in their understanding of the function and use of the Portal. The two participants who used the Portal are highly satisfied with its services. Other participants say the Portal is not a 'major player' for them; there is not enough budget, or they do not know Portal well enough.

Recommendations for management

The recommendations for management relate to the management team of the University (such as pro vice-chancellors and deans). Such a top-down approach is needed because of the nature of the recommendations. The core suggestion consists of improving links between academic and marketing staff. The research clearly indicates that marketers feel disconnected from the process of developing study programmes. They feel frustrated because they cannot do what they are trained to do (market research in terms of the needs and wants of the market, and product development). They often do not understand how academics develop new programmes, on what basis they decide about the target group, and what constitutes good market research for academics. There seems to be a wide gap between marketing departments and academics, and not only a professional but an ideological gap (e.g. marketing will disseminate information only if it raises profile of the University or recruits students, academics often disseminate information solely for the sake of disseminating information). It is understood that the views of the marketers are coloured by their marketing education, professional experience and current HE market discourse. On the other hand, the views of academics are influenced by theory, academic discourse, education and practice (e.g. teaching). Connecting these two worlds is crucial for a better functioning marketing department at the University and a better interdepartmental atmosphere within the University. It is an intervention that would help academics to understand the perspective of marketers; moreover, if marketers were to understand the perspective of academics it would help the University to function better as an organisation.

Such an intervention could consist of a number of critical exercises. These could use techniques similar to CR retroduction processes, for example asking the question WHY?, e.g. 'Why do we call the marketing department a "marketing department" if it mainly undertakes promotion?', or 'Why is the culture of our marketing department so different from the culture of academic departments?' The exercises could also use counterfactual thinking techniques (Danermark et al. 1997, p. 101) and ask questions such as 'Could one imagine official University materials including not only the positive experiences of students but difficult experiences?' or 'How would the University communication look if students could write direct comments on their study experience on the website, without the University having editorial power over such comments?'

Possibly, if such highly challenging exercises are undertaken at an interdepartmental level to connect the marketing departments, managerial board and academics, a constructive debate would emerge leading to better interdepartmental understanding and embedding the 'realistic values of marketing for HE' as well as deeper engagement with current problems relating to the changing HE environment.

9.3.1 Final reflection on the CR philosophical framework

This section reflects on the overall research process, specifically the usefulness of the CR philosophy for a research problem relating to HE marketing. The main reason for choosing CR as a philosophical and analytical framework was the elaborated ontology and epistemology of CR that encouraged the researcher to combine disciplines, theories and methods. This section first reflects on how the CR philosophy helped with building and working through the theoretical and analytical framework, then looks at the challenge of identifying the CR Mechanism + Context = Outcome explanation.

CR philosophy was used to build the initial theoretical framework that combined a number of theories from the market/marketing discipline (the IMP Interaction framework, the 4P Marketing Mix, the economic market mechanisms, outsourcing and the values of the market and education). This framework informed the design of the interview schedules and finally, after interviews were conducted, it was revised in the light of the interview data and additional documents. In general, the CR framework has offered helpful guidance on how to proceed with such analysis.

The CR analytical framework also represented a helpful tool for analysis. However, after conducting the first analytical step of the case study description, the following steps merged into one big project of contrasting data with theories and the discovery of causal mechanisms. The most challenging part of the CR analysis was deciding what were the mechanism, the context and the outcome. CR theory does not help us to see the borders between these elements, therefore what is characterised as a context could as well be understood as a mechanism on another level, and what is characterised as a mechanism could be understood as a context. For this reason, the theory of IMP Interaction was called upon to establish what may be considered context and what may be understood as mechanism. On the basis of the IMP Interaction theory it was decided that only the macro environment characteristics would be considered as the context of the interaction between the University and the Promotional services. This decision proved to be helpful in structuring the research problem. Without the IMP theory, such structuring would be difficult.

Finding the list of mechanisms and trying to engage with the retroduction processes proved a challenging task. The list of mechanisms seemed to grow and the explanatory power was lost in its complexity. The important step of **clustering** the mechanisms therefore needed to be taken. By clustering mechanisms into themes, the explanatory power of each theme became stronger. The basic retroduction technique of asking the question WHY? was used most often when trying to identify the mechanisms. The proposed technique of counterfactual thinking (Danermark et al., 1997) was not used extensively, because too many possibilities could be opened by such imaginary framing. The scope of the research did not therefore allow checking of the applicability of such framing. On the other hand, the technique of the social thought experiment (Danermark et al., 1997) was used when talking to research participants and asking them what marketing for HE means to them. Such questions resulted in a better understanding of the participants' work.

The M + C = O explanation initially identified after the case study description was a helpful tool in answering the research questions. The research aimed to refine the CR explanation after the discussion chapter, but this proved difficult. The main problem was that listing all mechanisms (even when they were presented as themes) resulted in a labyrinthine scheme, yet simplifying the explanation meant that important elements were missed. An appropriate way was to use rather general points that illustrated the main M + C = O. These served as a good overview of the characteristics of the University and Promotional services relationship, and what causes its characteristics (Table 8).

In general, the CR philosophical and analytical framework was helpful in conducting the research. Its main contribution was clear guidance on how to combine different theories and disciplines, and how to re-develop the theories in order to explain best the phenomena under investigation. The exercise of identifying the Mechanisms + Context = Outcome proved to be challenging but highly useful.

Table 11. The final CR Mechanism + Context = Outcome explanation

Mechanisms	Context	Outcomes
Organisational character		
Financial resources (the University: both public and private; competes for funding; is publicly exposed; is relatively open about generating income; the Agency private - fully dependent on clients, the Portal both public and private = can do extra activities such as service for students to share their experiences).	UK Governmental policies and regulations (decreasing public funding changing recruitment rules, Visa restrictions)	**Importance and need for promotional services is growing** (the Agency is busier, the Portal experienced more interest, the University does more advertising).
Power (power relation between organisation - e.g. the University is the client; power relations within the organisation - e.g. academics vs marketers)	Degree of national & international competition (UK very competitive as a country + the University's specific position and strategies)	**The University as the main influencer of the campaign** (the University as a client - power relationship; the Promotional services advise, but it is the University who mainly influences the character of the promotional campaign).
Structure (the University: Complex and stratified institution - disparate knowledge, perceptions and communication - academics, management, officers, corporate department. Marketing is a highly scattered function within the University; the Promotional services: unified institutions - aims, focus, ways of working; knowing their business well, passion for business).	Demographics of the country (can affect the students numbers, and can be affected by marketing strategies)	**High level of disparateness**: both positive and negative experiences (e.g. the Agency can advise well vs. does not offer innovative solutions); advantages and disadvantages (e.g. saves time and trouble vs. loosing contact with media is problematic); both appreciation and tension (within the University, between the University and Promotional services and between the two Promotional services). Both the Agency and the University think that the other party should be more proactive and less reactive; there are very disparate perceptions of how work flow should work and there is inaccurate information about financial flows and effectiveness.
Strategy (the University: general strategy - e.g. research oriented, selective, based on reputation. In general there is a scattered knowledge of the institutional strategy. There is a perceived preference of outsourcing over employing. The University is relatively new to marketing HE, now promoting more than ever before, exposing steep targets, more business-like. Recent internal changes such as cost cutting and restructure. The Promotional services: shared aims of the business, clear strategy with focus on marketing and market research, aim to motivate universities to be more marketing focused, the Portal not only university but student focused, both services convinced about their value for money).		
Technology and communication (the importance and issues with measuring campaign effectiveness - all marketers want to measure, but have different systems, knowledge, resources and technology. There is also a general issues of communicating within the organisation and between organisations - not always clear, many points of contact.		**Similar but mixed values**: the organisations share operational values (e.g. work well with the client/the Promotional service; create programmes and campaigns on the basis of a market research), but there is a conflict within the University (ways of working – academics vs. marketers) in some cases there is an internal conflict (role conflict) and mix between education and market values (e.g. both increase profit and increase students' criticality).
Individual character		
Within the University: people have different ways of working, different values (also there is a value conflicts on an individual level), different education and experiences, different expectations, different understanding of the contract with the Agency, different understanding of value for money; Within the Promotional services: Shared ways of working, similar values (but also value conflict on individual level), similar education, experiences and expectations.		

9.4 Abductive generalisation to other universities and promotional services

Theoretical discussion on generalisation was developed in section 4.3.1 where the case study approach was justified. It was argued that this study is not aiming to generalise to population, however, in line with the CR philosophy, others can learn from this study when taking into consideration the context and mechanisms of this study and the context of their specific situation. This generalisation is called the abductive generalisation (or generalisation to theory) (Danermark et al., 1997).

Other universities and promotional services can therefore use the final Mechanism + Context = Outcome explanation (Table 11) together with the re-developed model of the University and Promotional services interaction, compare the studied case with their case and extrapolate to their situation.

For example other UK based Russell Group University with complex and stratified structure could expect similar outcomes when outsourcing UK based media booking agency. On the other hand newer universities (post 1992, 2004) are in quite a different situation. They were established later and they knew that they are entering a competitive market place therefore they were market oriented since the beginning. As this research suggests (interviews with the Agency) newer UK universities are ahead in marketing thinking and therefore possibly the level of interaction disparateness between newer universities and agencies is lower. Also, the value conflict between academics and marketing officers could be less prominent.

There might also be a difference between private and public institutions. The studied University receives both public and private funding but ultimately it is a public institution which competes for funding, is publically exposed and responsible to the government rather than to commercial stakeholders. A private institution with its responsibility to generate profit for their stakeholders might have quite different values and use promotional services in a different way - as for example the scandal of the London School of Business and Finance suggests (Malik et al 2014).

When applying the model and the M+C=O formula to international universities, considering the specific mechanisms and context becomes even more important. For example the interviews with the Portal suggested that universities from Middle East are only just starting to consider the power of marketing. Therefore, their use of promotional services such as the Portal is different from UK or US universities who often use promotional services to help them to employ elaborate marketing strategies to compete in the HE marketplace.

In summary, it is not possible to generalise to wide population of universities and promotional services from this study, however the re-developed models and the specific M+C=O formula can be used as a valuable and powerful tool for understanding the interaction of other universities and promotional services.

9.5 Key summary of findings and contributions

The contributions of this research may be summarised in four points. First, the research contributed by developing a model that helps understand the interaction between the University and Promotional services; second, by explicating the values of the University and Promotional services and developing a 'realistic set of values of marketing for HE'; third, by suggesting ways of approaching problems related to marketing for HE and the interaction between universities and promotional services; and, finally, by contributing to research on marketing for HE by applying the CR philosophy.

The main quest of this study was to **understand the interaction between the Universities and Promotional services**. The research focused on one University and two Promotional services in order to collect and analyse data that led to the development of the model of University–Promotional services interaction. Even though this research is based on a specific case, others may learn from understanding the model and comparing the context of this model to their own background. The model may be used to understand the environment of the interaction, atmosphere, interaction process and interacting parties.

The **environment** of the University–Promotional services interaction is influenced by the HE policies and regulations, by national and international competition and by demographic changes. At the moment these factors are perceived to push the University towards promoting more and using promotional services to a greater extent. This research, however, points out that the interaction parties also have the power to influence the environment. For example, by applying complex strategies to compete on an international market, the University inevitably changes the market.

The research also stressed the interrelatedness of the factors influencing the interaction. For example, the factors classified within the **atmosphere** of the interaction (power dependence, cooperation, expectation and social distance) play an important role not only on the inter-organisational level but on the intraorganisational level, where the atmosphere between different departments, for instance, influences the way the organisation functions, and how the interaction between the university and promotional services develops. For example, the imperfect communication between Corporate Services and the MOs of the University meant that there were significant differences between the how Corporate Services and the MOs in faculties work with the Agency.

The **interaction process** between the University and Promotional services is, therefore, highly disparate and complex. Moreover, the research points out that the interaction process is not only influenced by the interacting parties, who were within the focus of the research, but other actors such as other promotional services (e.g. designers and copywriters). All **interaction parties** are then highly complex and in understanding the interaction between any university and promotional services it is important to see the complexity and disparity of perceptions, values and ways of working. It is also essential to see how the advantages yet also disadvantages of outsourcing may be lost in such disparity and how unrealistic it is to think about marketing of HE as an independent function of the University. A **'realistic set of values of marketing for HE**' was therefore developed. These values concern the goals, motivation, method and standards of excellence of marketing for HE. However, they also acknowledge the complicated and tangled nature of universities and what needs to be taken into account before such values can be embedded and exercised.

In practice, bottom-up approaches (e.g. marketers openness to communicate better), as well as top-down approaches (e.g. closing the gap between academic and marketing departments) need to be adopted to tackle the challenges of university-promotional services interaction and HE marketing in general.

The philosophy of critical realism proved to be a most useful tool for such research. The application of the CR philosophy to research on HE marketing represents an additional contribution of this study. The main contribution of CR to research on marketing for HE lies in the combination of different disciplines and theories. Such theories can be helpfully contrasted to capture the conflictive nature of marketing for HE. Second, the philosophy of CR encourages the researcher not only to describe the situation but to look for underlying reasons for the situation to exist, leading to a deeper understanding of the case. And third, the CR processes may also be used in practice and the research suggests a number of ways how, for example, the retroduction processes could be used to encourage critical thinking within the University.

Concluding personal statement

This is the final section of the thesis and aims to follow up the introductory personal statement presented at its beginning. In this section the researcher steps out of an academic writing style and back to the first person to show how the research impacted on her own learning and to indicate the next steps for developing and dissemination this research.

I embarked on this PhD journey because I wanted to understand the field of marketing for HE, especially the interaction between universities and promotional services. My reasons were academic (a gap in the literature), but also personal (working in marketing for HE and feeling too immersed in the work to be able to see the bigger picture). Now, after four years of intensive effort, I can say that I have learned much about marketing for HE, and also about ways of working with theory and literature, about conducting a research project, understanding philosophy of research and understanding the impact of a researcher's personality on a research project.

My personality was formed by my education and work practice. The reason why I decided to work in marketing for HE after finishing my master's degree in marketing communication was because I considered education to be a worthwhile 'product' to 'market'. Therefore, I did not start from the point of view that marketing is an evil practice that wants only to destroy education. However, now I can see how much understanding I actually lacked in the educational context and how much time I had to spend to at least partially understand it. When I make recommendations to HE marketing, I am conscious that we cannot expect every marketing officer to do what I did (to leave their job to understand better the context in which they work), nevertheless I hope that the findings of this research will inform not only an academic audience but professional marketers.

The academic audience is covered mainly by journal publishing and conference attendance. During my studies I presented at three conferences and have published one journal paper. This paper talks about the relationship between the economic market theory and the marketing theory. Future papers will address the 'realistic set of values of marketing for HE' and issues relating to outsourcing HE promotional services.

In order to find its way to practitioners, I am first planning to present the findings to the participating organisations and then to create an online resource (e.g. a YouTube video) where findings will be presented in such a way that marketers for HE may benefit.

I hope I can find a way to develop the research further. Future research could, for example, closely examine the different world views of academics and marketers and what steps need to be taken to interlink these in such a way that the 'realistic set of values of marketing for HE' is exercised in practice. It would also be interesting to widen the study by investigating different universities (e.g. non-Russell Group institutions) and a greater number and variety of promotional services (e.g. PR agencies, and copywrite and design agencies).

Finally, whatever the future will be, I will ensure that I use the knowledge I have accumulated during this PhD journey in a constructive and critical fashion.

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Appendix 1 – the alignment of data collection instruments with theory

This appendix demonstrates the alignment of interview questions and the theoretical framework. Such alignment is important because it shows not only the link of the interview questions to the theoretical framework, but also the link between the research questions and the theoretical framework. That is because the theoretical framework and the research questions were developed after the gaps in the literature were identified. The research questions reflect on the gaps and on the chosen theory. The interview schedule was carefully developed to answer the research questions.

This document first presents the interview questions asked to the Promotional services and then the interview questions asked to the University. On the left side coloured lines link the specific interview question to the specific theoretical concept. The key to the coloured lines is presented here:

Colours representing the concepts of the theoretical framework:
IMP Interaction framework:

Interaction parties

Interaction process

The atmosphere

The environment

Values:

Education, market values

Interview questions for the Promotional services

What is your role in the promotional service?

How long have you been working for the promotional service and how has your role developed?

What are your personal aims in this role?

What is the purpose of the promotional service?

What are the aims of the service and how have they developed over the time?

How does the company achieve these aims?

Do you think your work/the service relates to students and their educational experience? How?

Do you have any interaction with students?

Do you influence the style and content of the advertisement? How?

How do you cooperate with other suppliers to deliver the service?
How do you build relationship with suppliers?

What characterises your work with the University/the (other) Promotional service?
How would you describe the University/the (other) Promotional service (as if describing to a colleague who was to become involved in dealing with it)?
What do you think is the main purpose of the (other) Promotional service?

How do you communicate with the University/the (other) Promotional service? Are you satisfied?

Could you give me some examples of things that the relationship between you and the University (and the (other) Promotional service?) does that you find helpful/and unhelpful to you in your job?

What is the usual financial value of your service?
Do you charge commission on your service? To the University or suppliers?
Have you developed any special financial procedures with the University?
(for the Agency) Do all suppliers give you discounts? On which bases?

Do you measure the impact of the advertisement? How? Can you measure conversion?

In general, can you give me an example of a good/and bad marketing campaign for HE?

In general, what do you think marketing communication for HE ideally stands for? What do you think is a bad practice of marketing communications for HE?

What characterises the political/economic environment? How much does the political/economic environment influence the relationship between you and the University/the Portal?

Interview questions for the University

What is your role in the university?

How long have you worked for the University in this role and how has your role developed?

What are your personal aims in this role?

What do you perceive to be the purpose of this University and how does your work/department fit into this?

What are the aims of the University and what are the aims of your department?

How do you achieve these?

How do you think your work relates to students and their educational experience?

How much is your work dependent on other "suppliers"?

Which Promotional services do you use? How do you communicate with them?

Why and how do you use the promotional service (the Agency/the Portal)?

How would you describe the promotional service? (as if describing to a colleague who was to become involved in dealing with it)

Since when have you been using the service?

Was it difficult to swap to this system?

What are your specific marketing challenges and how might the promotional service contribute to your work?

What services do you receive from the Agency?

How do you communicate with the Agency?

Are you satisfied with the service?

Do you trust their recommendations?

Could you give me some examples of things that the relationship between you and the promotional service does that you find helpful/ and unhelpful to you in your job?

Does the promotional service influence the style and content of the advertisement? How?

What is the usual financial value of the exchange undertaken with promotional service?

Do you think it is financially efficient for the University?

Do you measure the impact of the advertisement? How?

Have you developed any special financial procedures?

What characterises the economic/political environment and how does the political/economic environment influence the relationship between you and the service?

In general, can you give me an example of a good/and bad marketing campaign for HE?

In general, what do you think marketing communication for HE ideally stands for? What do you think is a bad practice of marketing communications for HE?

Documents

Websites

Organisational strategy, internal documents

Examples of communications produced by the promotional service

Appendix 2 – the final coding framework of the study

This is the final coding framework. The framework was developed during the first analytical stage. NVivo was used to manage and code the data.

Name

- 1. Outcomes of the university, promotional service interaction
  - Describtion of University and Promotional services
    - Agency description of Portal and other promotional services
    - Agency description of University
    - Portal describing university
    - Portal description of Agency
    - Universities description of Portal and other portals
    - University description of Agency
  - Finances
- 2. Context of the university, promotional service interaction
  - Promotional services environment, market
  - University environment, market
- 3. University values
- 4. Promotional service values
- 5. First draft of the candidate mechanisms
  - Agency history and present function
  - Agency reasons for using the promotional services
  - Defining HE marketing, HE market, HE product
    - University marketing past
    - University marketing present
  - Demand of students and universites
  - Participants and their aims
  - Participants background
  - Portal history and present function
  - University reasons for using the promotional services
- 6. Unhelpful

Appendix 3 – the process of analysis

Overview of the analytical process

This section demonstrates the process of analysis and the application of the critical realist analytical framework. As figure 17 shows, the analysis started with transcribing (step 1) and coding (step 2) the interview data. Coding consisted of two parts. Firstly, an initial coding framework was designed – presented in section 6.2.1 of the thesis. Secondly, new codes and sub-codes were added during the coding process – the final coding framework is displayed in appendix 2. The NVivo software was used to code the data. The coding process was also part of the CR methodology, specifically the abduction processes. The abduction processes are concerned with working with theory (using theory as a starting point and re-developing theory). The initial coding framework was a starting point and therefore it was based on the IMP interaction theory and the theory of education and market values. The final coding framework then emerged from the data and featured additional codes (theoretical re-development).

After the coding was finalised the researcher looked across the codes in order to identify themes (step 3). This was a tedious process and the logistics of this was to print out each code, re-read the content numerous times and use highlighters of different colours highlighting strong or important information. In this stage the researcher also used additional documents such as the budget spread sheet for the Agency and the strategy of the University. Once the researcher had a clearer idea of the main essence of the data, the technique of telling the story to a critical friend to finalise the themes was used. This helped the researcher to draw out the main points from the data and present it in a way that is understandable to a non-specialist (without the theoretical terminology).

After themes were formed and discussed, the researcher derived the final Mechanism + Context = Outcomes explanation (step 4) and at the same time came back to the initial theoretical framework and contrasted the existing model with the collected data in order to re-develop the theory (step 5). In this stage the epistemological processes or abduction and retroduction were used. Abduction concerned with a long process of theory re-description, and developing the model of University and Promotional services interaction (section 9.1). Retroduction processes were used to deepen the explanatory power of the discussion developed around the model of the University – Promotional services interaction and to develop and discuss the 'realistic values of marketing for HE'. The retroduction technique of asking question 'why' and the technique of asking question in an unexpected way was used (these techniques are discussed in section 4.2).

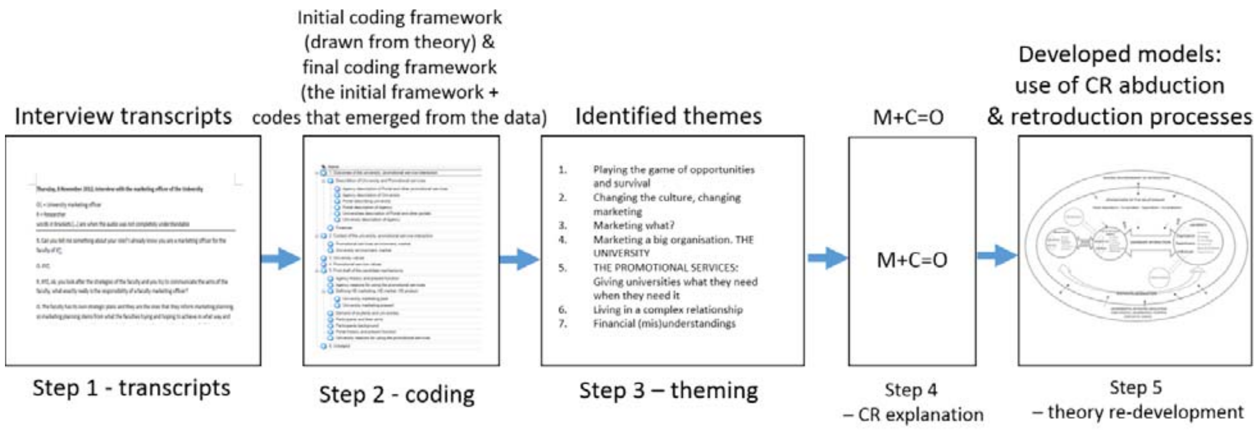

Figure 17: The process of analysis

Specific example of coding, theming and theory re-description

Figure 18 and 19 show specific examples of the analytical process (steps 2 & 3). This examples relate to theme identification, specifically themes 4 & 6. These themes then directly influenced the re-developed interaction model (specifically the attribute related to the disparate interaction between and within organisations) and the developed theory of 'realistic values of marketing for HE' (specifically the 'method' of achieving the realistic values).

Figure 18 shows how one quote was coded. The quote:

> *Researcher: Was it difficult to swap to this new system?*
>
> *MO4: I didn't find it that difficult, the difficult, I guess the difficulty is that perhaps it wasn't communicated very well across the board, so as marketing officers we knew about this service, we knew that we had to use it and sort of the legalities behind it, whereas academics perhaps don't seem to be that aware as we got a particular academic in the*

faculty who has a habit of speaking to an advertiser, they sort of bombard him with phone calls and until he says he is going to book, and we would find out the day before that we need to provide art work for the advert, and that it has been booked not through Agency. So then we have to contact Agency and try and sort it out that way, because other ways they wouldn't get paid basically, because they are not on our procurement list. So I think the difficulty has been transforming other people's opinions and showing them that this is the process that you should now be taking.

This quote was linked to a descriptive code named 'University's description of Agency'.

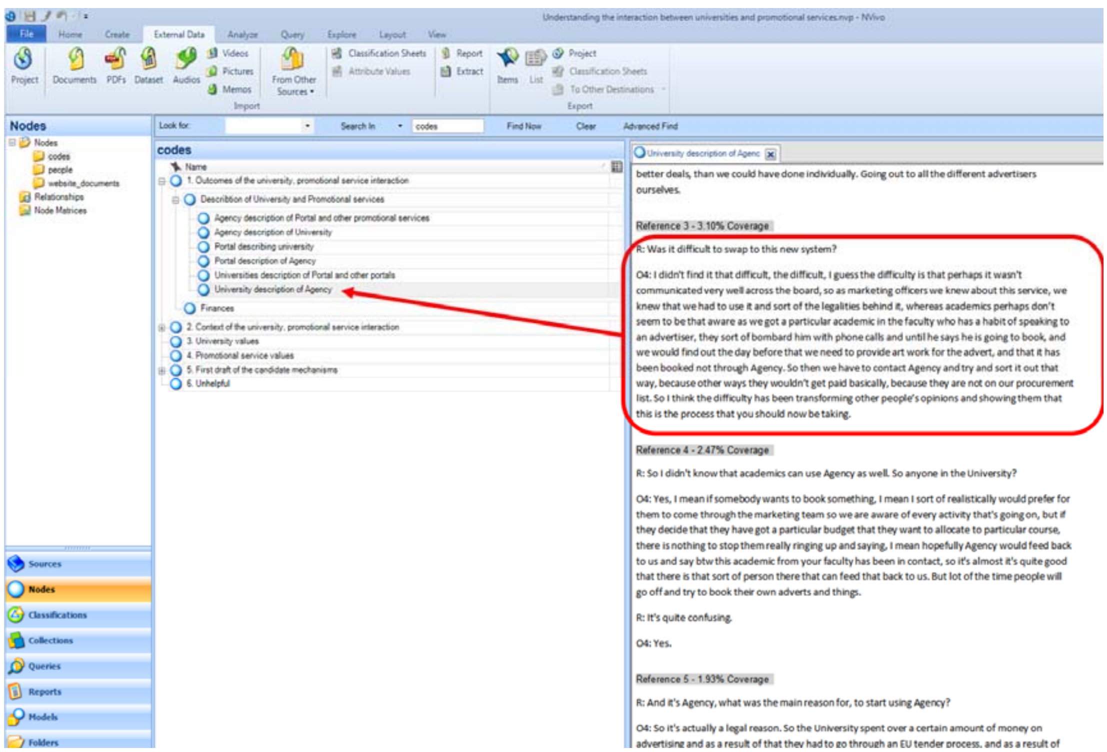

Figure 18: Coding the interview data – example 1

The second example is from the descriptive code called 'Agency describing University':

Researcher: Yes, this has been quite interesting from my point of view as well, because I have been talking to a number of marketing officers and it's really interesting to see how they understand the role of Agency, so this might be something to feed back to you afterwards.

PD: Yes, I think so I mean that is one of the challenges I think every structure of a university that we are dealing with, we deal with a lot of universities, it's different. And it's quit a siloed structure, so the interactions that we get and once again the team will, AD will get to explain that a little bit more, is very different almost from faculty to faculty, as well from different marketing officer to marketing officer. The engagement with each is different.

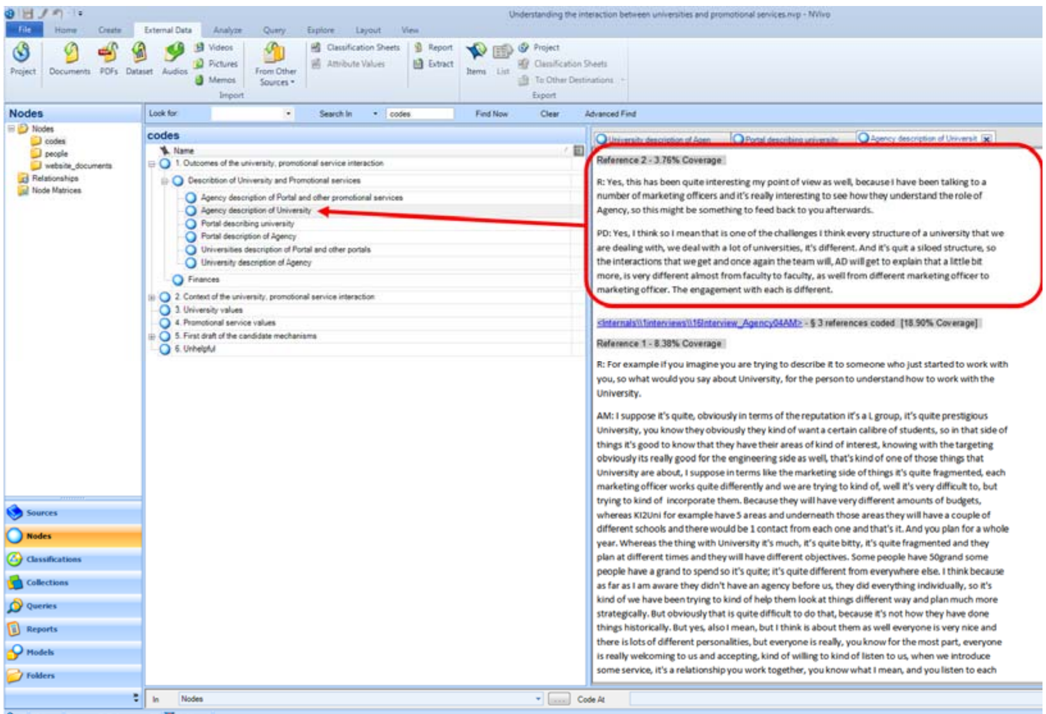

Figure 19: Coding the interview data – Example 2

These are only 2 examples of quotes. The codes 'Agency describing University' and 'University's description of Agency' had a high number of quotes. All quotes were printed. The researcher then searched the data for themes. The above quotes for example contributed to building the theme 4: Marketing a big organisation – THE UNIVERSITY, and theme 6: Living a complex relationship. When looking at the description of these themes (section 7), it is clear why these quotes and codes contributed to building these themes.

In case of the re-developed interaction model, the above quotes and themes contributed to building the attribute of 'disparate interaction' (between and within organisations), because the data clearly shows that the interaction is uneven and very complex. In case of the ‘Realistic values of marketing for HE’ the above quotes (especially the quote from example 1) contributed to formulating the methods of achieving the realistic values, because the data indicate that the collaboration between academics and marketing officers is essential, nevertheless at the moment, the cooperation is quite poor.

‘***Method***

Engaged effort of academic and marketing departments to cooperate and develop ethical marketing activities

(Even though world views often vary and time is scarce.)’

This is only a snapshot of the analytical process used in this research. However, this snapshot shows the logic adopted for analysing the data, working with the epistemology of critical realism and developing the theories.