cubo

College & University Business Officers

Campus Experience Survey

Summary Report for
Summer Conference, July 2019






Foreword

The 2019 CUBO Campus Experience Survey is one step in a dynamic, ongoing CUBO research programme to deliver insight, knowledge and added value to members. Never has the campus experience been more important to students and, arguably, never under greater scrutiny in terms of value for money. This self-assessment survey aims to benchmark campus performance and aid decision-making when investing in infrastructure and services for the future.

The survey captures the amount that institutions are investing into their campuses, and that such investment in infrastructure and experience goes hand in hand with the ability to recruit students. The investment into core undergraduates is evident, with a focus on the mainstream of students who will live and learn on the campus. Commuters and those with families as well as postgraduates and non-EU internationals are less well served, even though these student types are extremely important and strategically may play a far greater future role on campuses.

There is likely to be more competition in future, not only between established HE providers, but also influenced by the agendas of private providers, the rise of apprenticeships and other more flexible and industry-led teaching coming to the fore. The system and the policy landscape encourage us all to consider value for money more and more.

The survey has picked up much about institutional behaviour, as well as providing a baseline of the level of investment on campus in comparison with the size of the institutions. However, money is not everything, and the perceptual areas of the survey reveal a nuanced picture. Those in larger institutions are more likely to be or feel empowered, and greater size and investment capability seem to be used well, with more sophistication in the use of trend data. However, this survey also shows the continuing requirement to put the student at the heart of the system is perceived as enabling any level of investment to be used wisely and to great effect.

This first CUBO campus experience survey provides the baseline for future student research, as well as institutional benchmarking and a greater level of understanding over time. We are very pleased with this first round of research and believe much can be taken from it by higher education institutions when planning or developing services around the themes and trends it covers.

Jan Capper, Chief Executive

Headlines

- The campus experience is defined as any impression or perception someone leaves the campus with.The buildings, the public realm, the staff and services are all part of the campus experience.
- The most important roles that the campus played were to attract new students, enhance the student experience, offer students security and a sense of wellbeing and affect how people feel when they are present on campus.
- Although the campus is important as a recruitment tool, not all institutions make the most of the 'shop window' elements of it, and some are not maximising the showcase potential of the campus for recruitment purposes.
- The campus generally performs well for most user groups, but there is most work to be done to ensure the campus works well for the strategically important groups of postgraduates and non-EU students.
- There is a strong indication that student involvement in campus experience results in a greater level of campus performance.
- The self-assessment reveals institutions rate their sports provision most highly, with an average score of 7.54 out of 10. The second most highly rated service is residential at 7.42, followed by catering (6.86) and then retail (5.86), a full point behind the catering average. The average score across the four services areas and all respondents was 6.88. Single campuses scored themselves the most highly, and city based multi-campus institutions the lowest.
- Having one campus is a benefit in terms of a coherence in investment, and a single campus institution most often perceived its campus as a unique selling point. However, multi-campus institutions spend effort on creating communities.
- Campus officers would benefit from a stronger (more robust and collective) voice to share best practice and to advocate for targeted investment across the four areas, as all are working in a more competitive and commercial environment. They also indicate that greater agility and ability to forecast and respond to changing trends would help to meet the needs of a diverse and more demanding student body

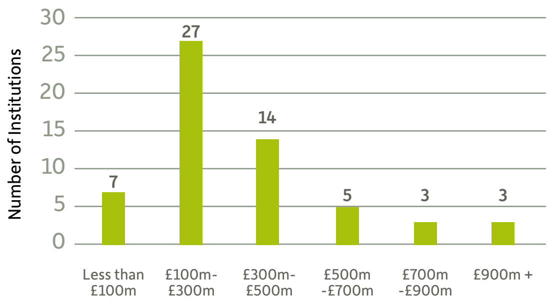
ANALYSIS

Who Took Part

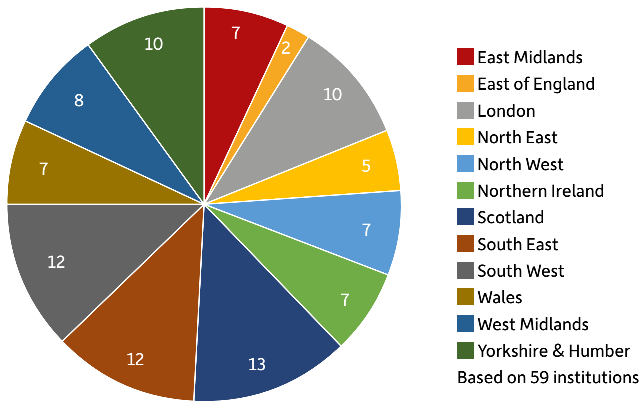
59 institutions took part, of whom 55 completed the return in detail, including 17 of the 24 Russell Group Universities. The institutions spanned the whole country and ranged in size (as measured by their annual turnover) across the spectrum, with the majority reporting an income of between £100m and £300m per annum.

Respondents were asked what type of campus configuration best represented their institution. As some single campus responses were ambiguous, the two types of single campus have been conflated into one, resulting in three types of campus for the purposes of this analysis.

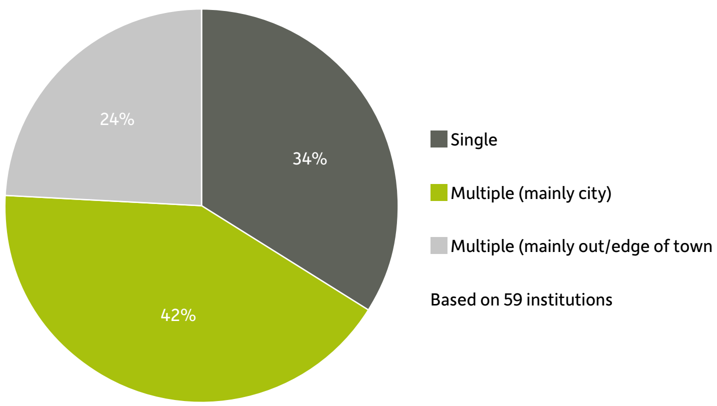
Institutions by Turnover



Regional Mix of Institutions %



Institutions by Annual Turnover



Definition of the Campus Experience

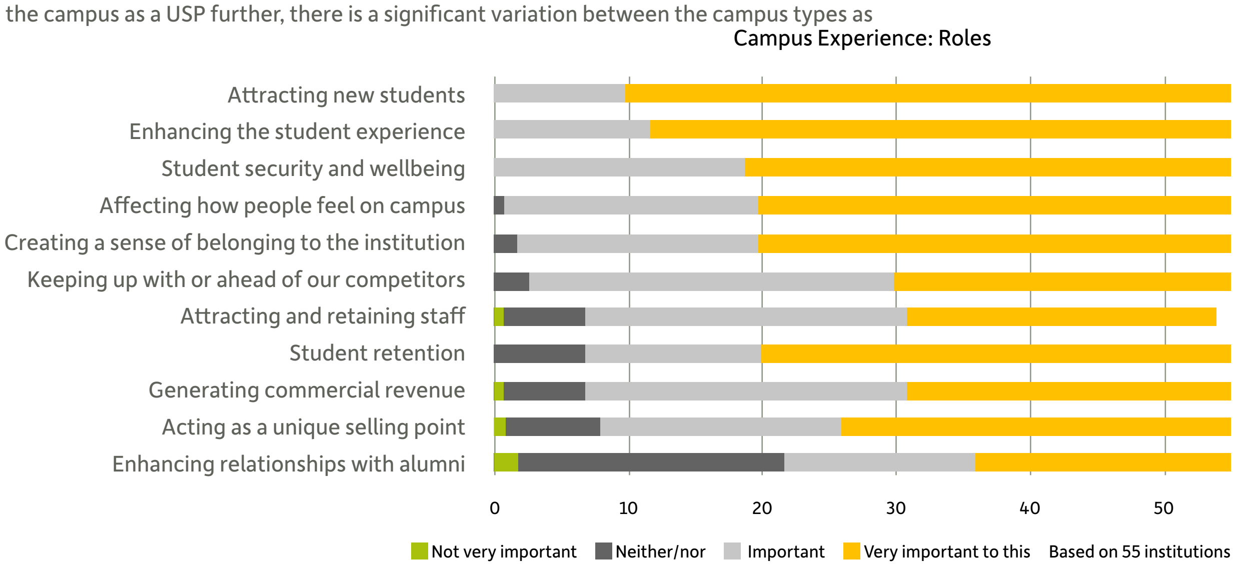
The definition of the campus experience has been agreed by 54 of the 59 respondents as the following:

"Any impression or perception someone leaves the campus with. The buildings, the public realm, the staff and services are all part of the campus experience."

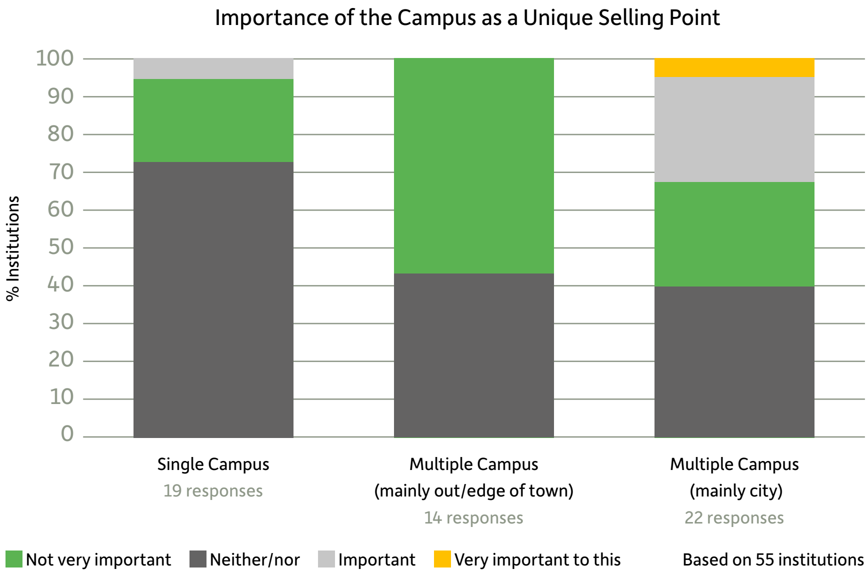
Feelings of belonging, how the campus makes someone feel and a sense of community were also emphasised in the supplementary open text responses. Further statements provided by respondents highlighted the interlinkage between academic and social experiences, the interaction between staff and students, and the notion that the experience is retained long after a person has left the campus.

Opinions on the Campus Experience

Respondents highlighted that the most important roles that the campus played were to attract new students, enhance the student experience, offer students security and a sense of wellbeing and affect how people feel when they are present on campus. Roles which the campus is seen as less important in playing were in enhancing relationships with alumni and acting as a unique selling point for the university.Exploring the point of the campus as a USP further, there is a significant variation between the campus types as



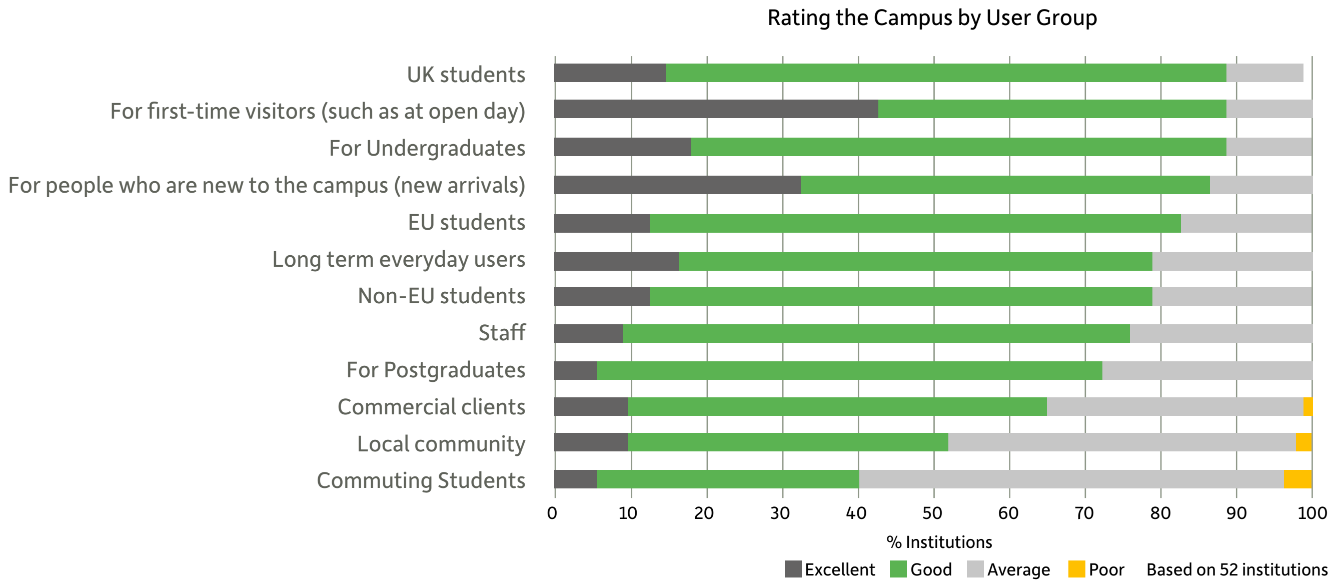
shown below. 70% of those with a single campus indicated that the role of the campus as a USP was very important, while those with a multi-campus city based model do not place as much importance on this factor.



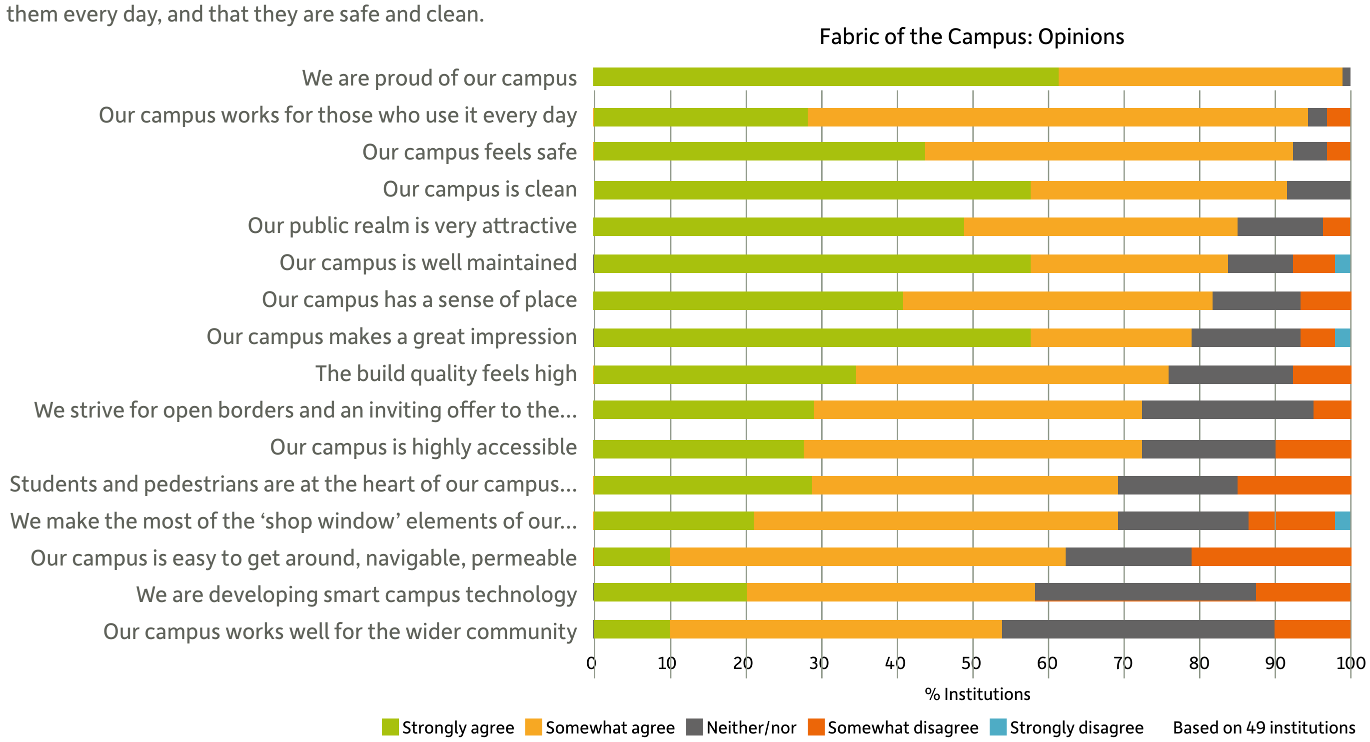
Respondents were asked to rate the campus' performance for a range of user groups (see below). Institutions rated the campus' performance most highly for UK students, first time visitors and new arrivals. This would make sense in light of the importance of the campus as a recruitment tool.

Some of the areas where the campus scored less well were particularly interesting, with ratings for postgraduates being less good, as well as staff and non-EU students. These groups could be seen as areas for consideration or improvement in future as they are all strategically important and highly competitive areas for institutions.

The campus performs least well for commuting students, the local community and commercial clients. Again, these are all areas where some institutions might see future strategy pillars, and are food for thought arising from the survey.

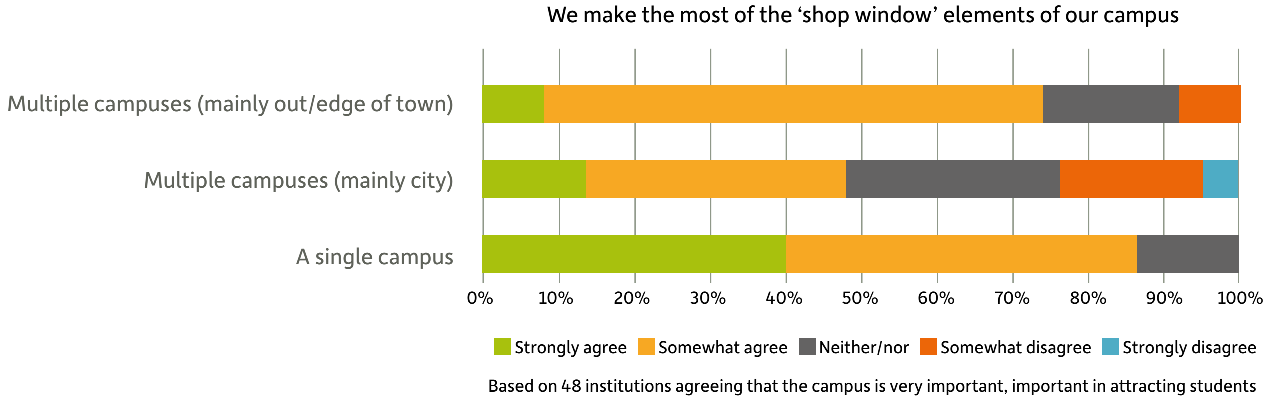


Respondents were also asked a series of opinion statements about the fabric of the campus. There is a significant sense of pride expressed about the campuses overall. Respondents felt that their institutions' campuses generally work well for those who use them every day, and that they are safe and clean.

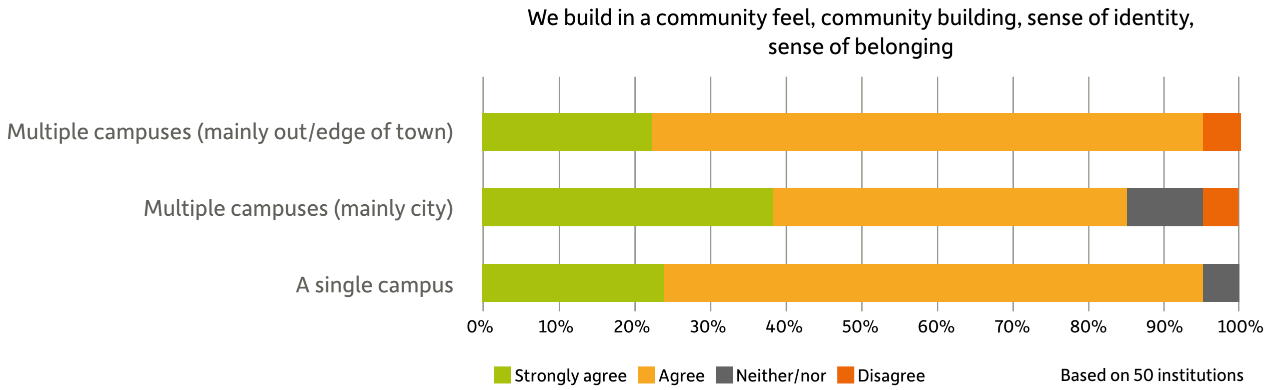


However, scores were lower when considering how the campus works for the local community and in terms of civic engagement, as well as the navigability and permeability of the campus. There is also a divide between those institutions who are developing smart campus technology and those who are not. The issues of campus design and how the campus is being used seem not to be as well addressed by institutions, and this may be the focus of further work in future particularly for large and resource-pressured institutions.

Of particular interest is the relatively low score for how well respondents felt the campus was being used as a showcase/shop window. Given the campus is so important to institutions in attracting students, some respondents indicate that there is untapped potential to showcase the campus. Analysing this by campus type we can see it is hardest for city based multi-campus institutions to make the most of the shop window elements of the campus.



A point about creating communities: although a single campus may inherently feel more like a unique selling point, institutions city based multi-campus institutions were more likely to be making strong efforts to build communities, as shown in the chart below.



Investment in the Campus Experience

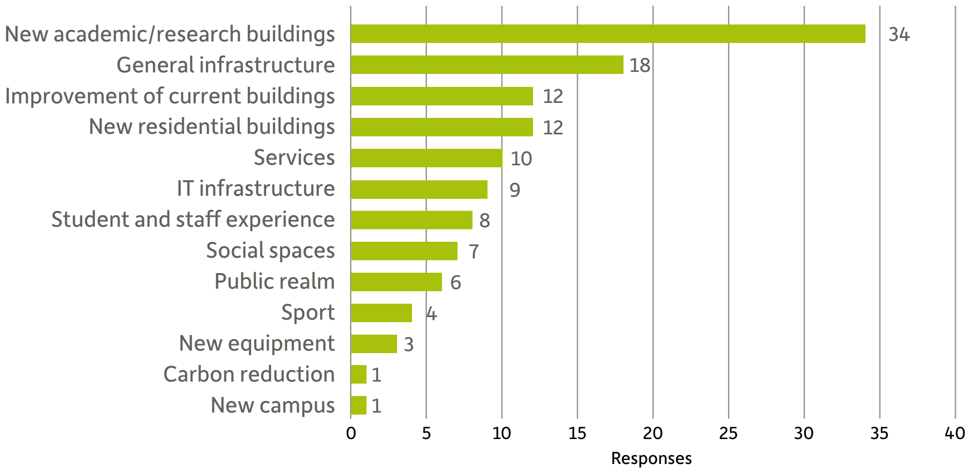
All institutions declared that they were investing in their campus and were asked to approximate their capital investment programme over five years. The investment programmes in most cases equated with one year's annual turnover, signifying the significant level of investment that is being made into campuses in the next five years.

	Approximate 5 year capital investment programme					
Approximate Annual Turnover	Less than £100m	£100m - £300m	£300m - £500m	£500m - £700m	£700m - £900m	+ £900m
Less than £100m	4	1				
£100m - £300m	10	11				
£300m - £500m	1	7	3			
£500m - £700m		2	1	1		
£700m - £900m			2	1		
+ £900m				1	1	1

Based on 47 institutions

Specific expenditure information was provided by 51 respondents who highlighted the following areas of investment:

Investment Priorities: Summary free text responses



The survey also asked what more needs to be done to improve the campus experience, and the most common answer with six responses was to improve wayfinding.

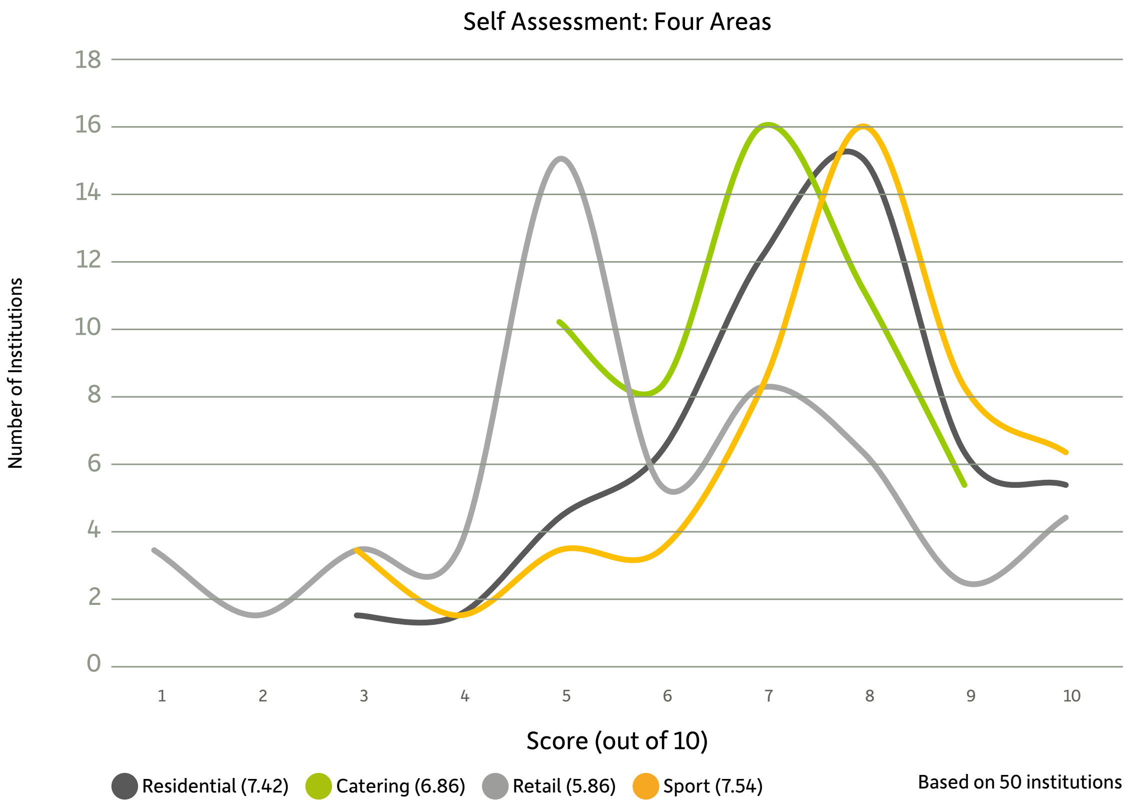
Signage, lighting, paths, road crossings, connections between buildings
Directional signage is poor and location codes not readily available
Intelligent signposting

Further comments were made about improving the public realm, increasing opening hours, and general campus maintenance to deal with the legacy of older estates.

The Four Area Score: Residences, Catering, Retail and Sport

50 institutions provided a score out of 10 for all four of the main campus services areas that form part of this survey. Below the chart highlights the pattern of scoring across the services.

This self-assessment highlights how well institutions rated their sports provision, with an average of 7.54 out of 10. The second most highly rated service is residential at 7.42, followed by catering (6.86) and then retail (5.86), a full point behind the catering average.

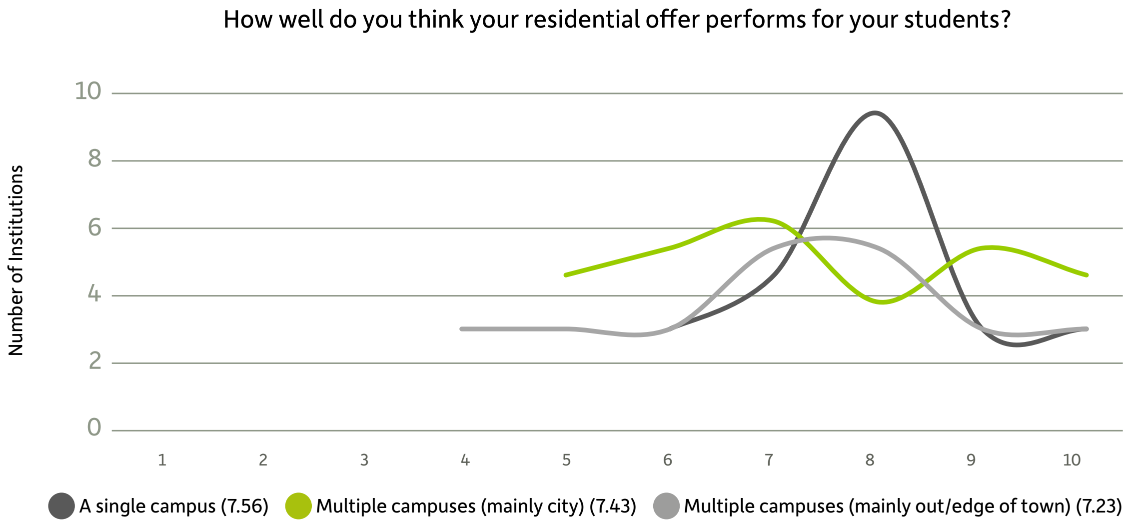


The four scores from each institution were also combined and averaged as a further measure of how institutions have assessed themselves, and to review for patterns. The average score across the four services areas and all respondents was 6.88. Single campuses scored themselves the most highly, and city based multi-campus institutions the lowest, as shown below.

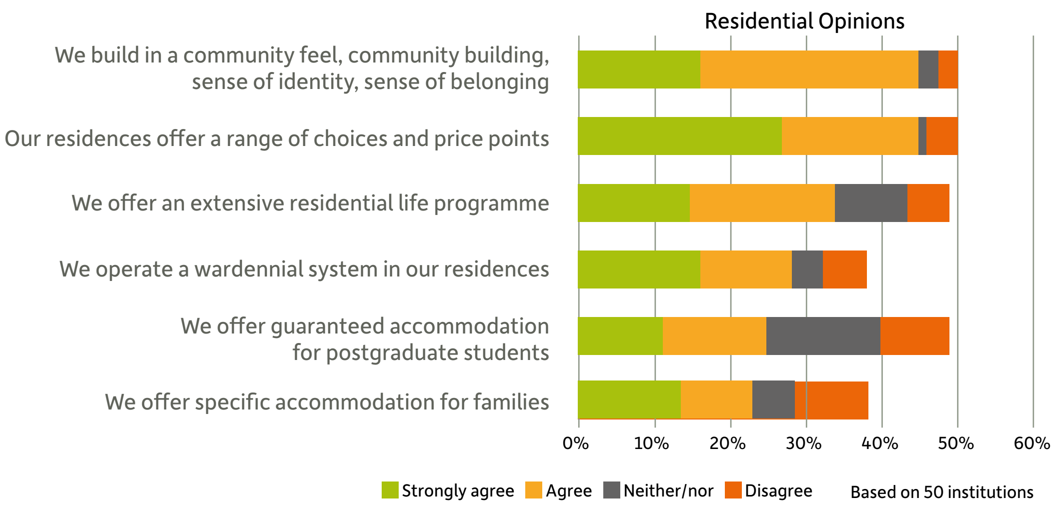
	Multiple campuses (mainly city)	Multiple campuses (mainly out/edge of town)	Single Campuses	All
Average Four Area Score	6.58	6.72	7.41	6.88
Responses	21	13	16	50

Residences

Respondents rated the performance of their residences positively overall, with an aggregate average score of 7.41 out of a possible 10. The single campus attracted the highest average score, but each of the campus types were rated within a close score range.



Respondents provided opinions on their residential offer. There is a great consensus of opinion that residences offer a range of choices and price points, and that they are instilled with a community feel and sense of belonging.



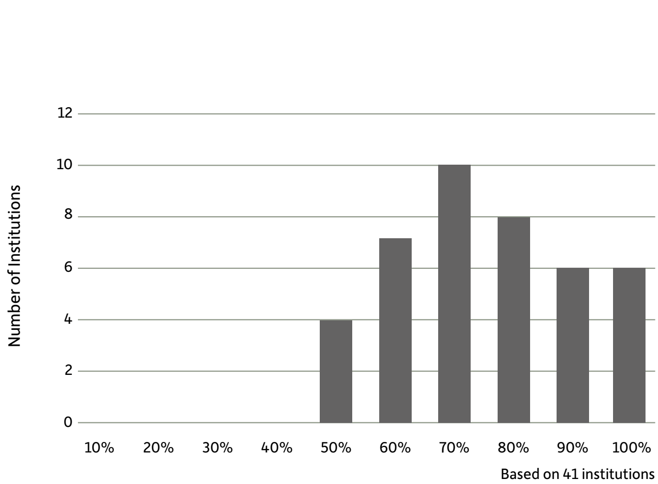
34 respondents said they offered an extensive residential life programme, and this seems more likely in multi-site campuses.

Moving on to whether institutions felt that their residences supported their recruitment activities, 44 institutions felt confident that their residential offer helps to recruit students, with 26 of these responses (or half of institutions) stating that their residences definitely helped them to recruit. No institutions felt that their residences hindered recruitment.

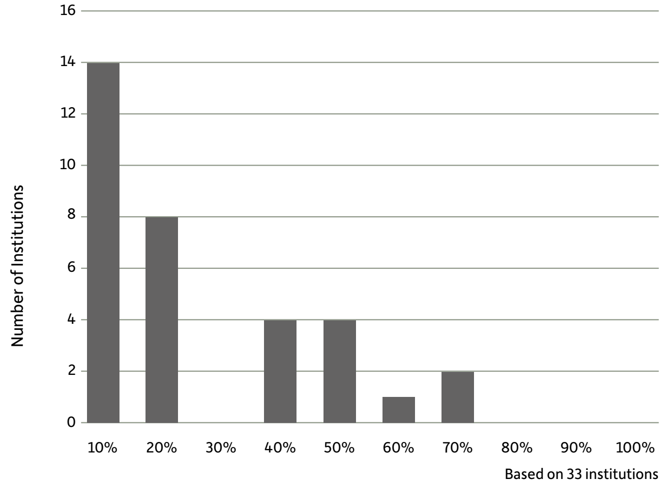
ANSWER CHOICES	RESPONSES	
It definitely helps us to recruit	52%	26
It helps us somewhat to recruit	36%	18
It hinders our recruitment	0	0
Don't know	12%	6
TOTAL		**50**

Most institutions are able to offer first choice accommodation to a good proportion of their students, but many are unable to house returning students. Many respondents also mentioned challenges around upgrading unattractive residences and offering accommodation for post-graduate students.

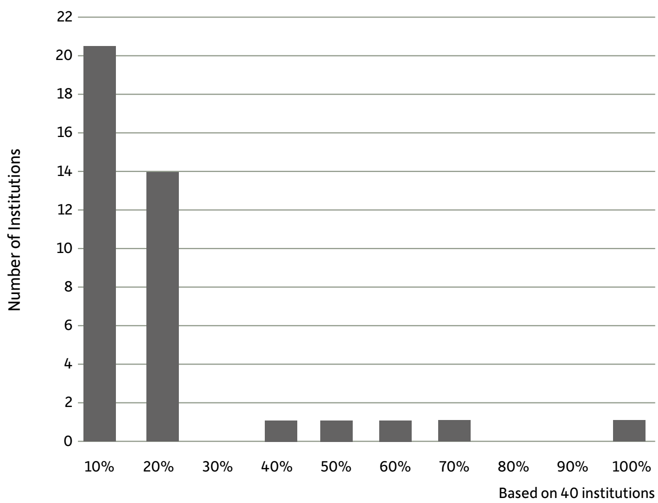
Percentage of students guaranteed accommodation that are offered their first preference residence



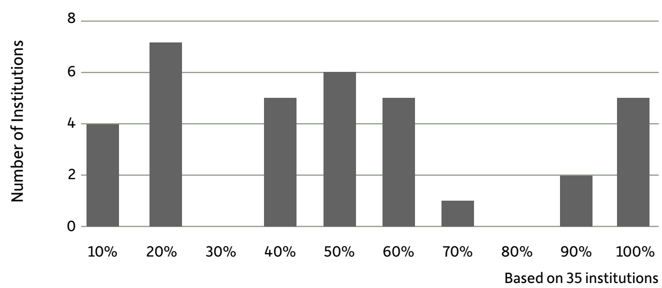
Percentage of residences we consider unattractive



Percentage of returning students housed



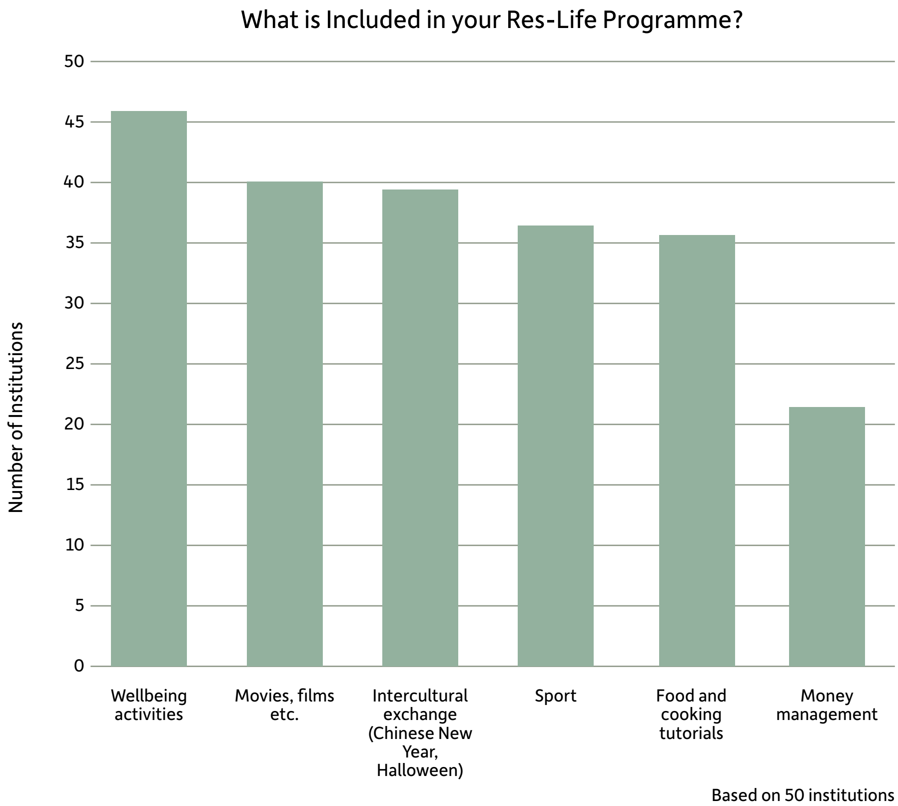
Percentage of students living in accommodation which is owned by you or managed under partnerships/nominations



Some further statistics on this point include:

- 30 respondents said that 70% and above of students were guaranteed accommodation that was their first choice preference (more likely in multi-site city centre campuses)
- 11 respondents said that 70% or more of their residences were more than 20 years old. Only 15 said 20% of their stock or below was more than 20 years old. Single campuses out of town had less older stock
- Across all campus types, only two institutions said that 70% or above of their returning students were housed, where 38 respondents said it was 20% or below
- 34 respondents said that 20% or below of their residences were unattractive whereas two (both multiple site campus out of town) said that 70% or above were unattractive
- 16 respondents said that 20% or below of their residences were owned by them or managed under partnerships or nominations compared with eight respondents who said 70% or more were
- 26 respondents, mainly multi-site campuses, were able to guarantee accommodation for postgraduate students

A wide range of activities are provided in residential life programmes across the majority of respondent universities with only two respondents stating they did not offer a residential life programme at all.



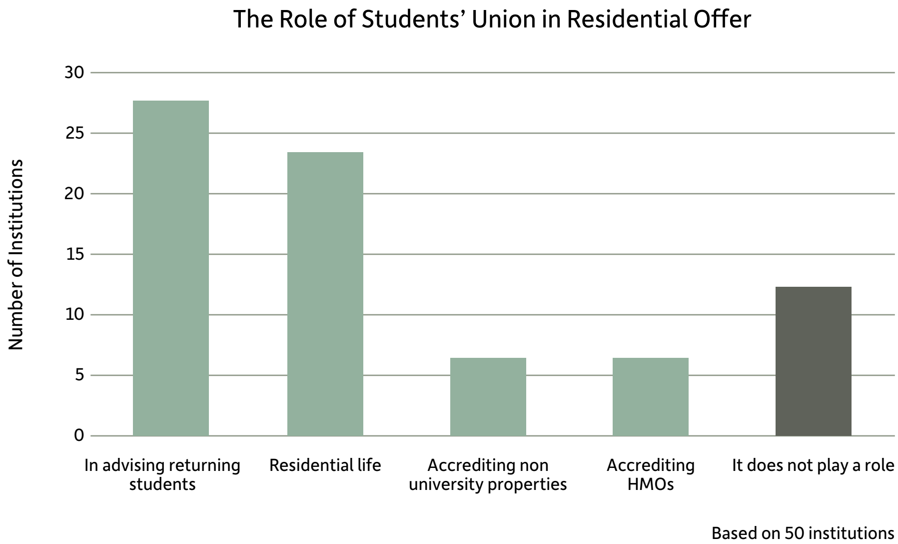
Additional Responses

- Volunteering
- Social interests
- Employment support/advice
- Musical events
- Day trips
- Inter-hall competitions
- Quiz nights
- Sustainability events
- Shopping trips

Only two respondents said they did not have a res-life programme

There seems to be a growth in the importance of wellbeing activities with some respondents outlining their investment in areas such as health hubs and the importance of outdoor, green spaces to aid wellbeing and greater community engagement.

The role of the students' union in advising students on residential provision, accrediting property and offering campaigning and advocacy support is important to at least half of the respondents. Just 13 respondents said the students' union did not play any role in residential life.



There were many and varied suggestions for improvements to the residential offer, all requiring investment and more resources, including the following specific ideas:

Suggested improvements for residential offer
(Based on 50 institutions)

- Hotel for short-term bookings/short term lets
- Better control of a more varied programme
- Further investment, especially in older property
- Improved quality, greater flexibility
- More flexible pricing
- Get rid of older stock and catered accommodation
- More en-suite
- More for post-graduates

While there was no clear area that all campus types agreed on for future improvements, in general respondents wanted:

- To own and operate more for themselves
- Improved social and communal spaces
- Better quality stock with upgrades of older properties
- Flexible pricing points/self selection of rooms/live availability

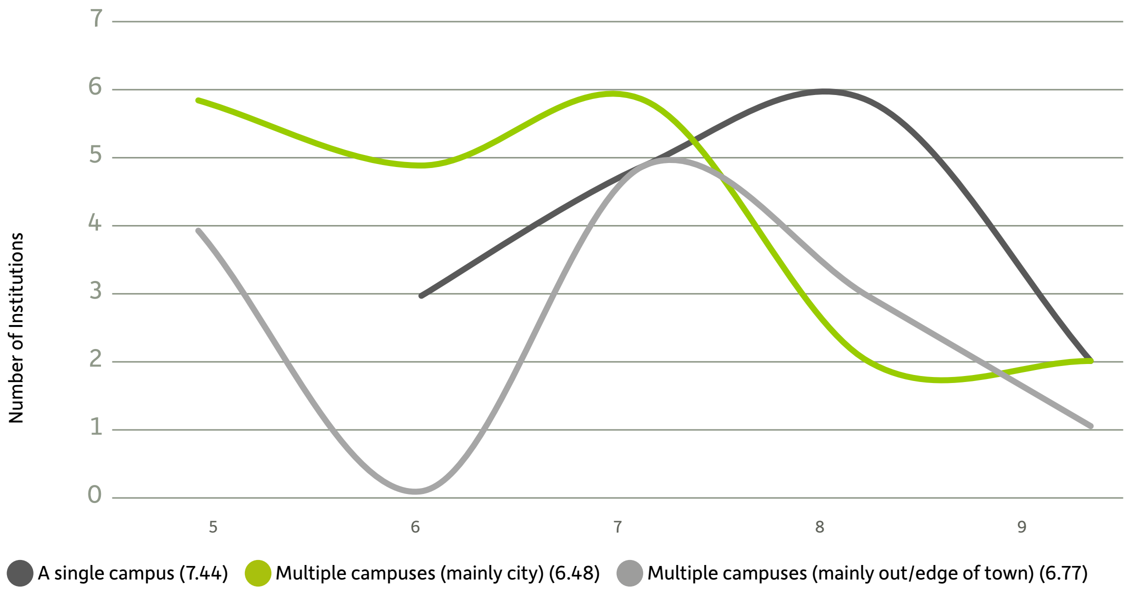
Some respondents felt that the residential experience forms an integral part of the campus experience and more work needs to be undertaken to reflect this.

All of the above would be supported by "*more certainty over budgets and staffing*" in the words of one open text response.

Catering

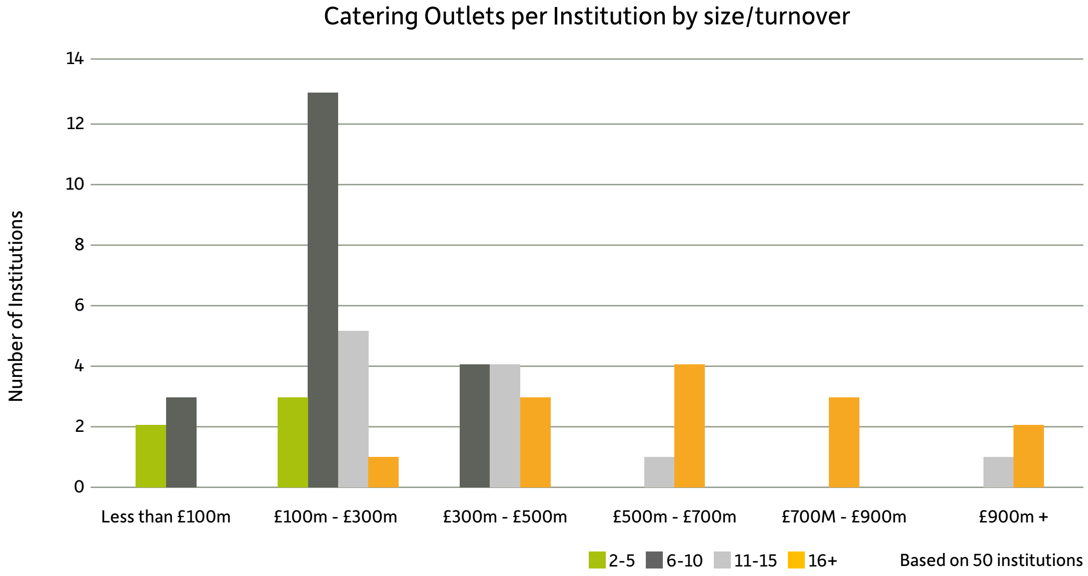
The overall score from 49 institutions for the performance of their catering function was 6.86 out of 10. The scores for this area varied more by campus type, with multi-campus city based institutions achieving an aggregate average score of a full point less than the single campus institutions.

How well do you think your residential offer performs for your students?



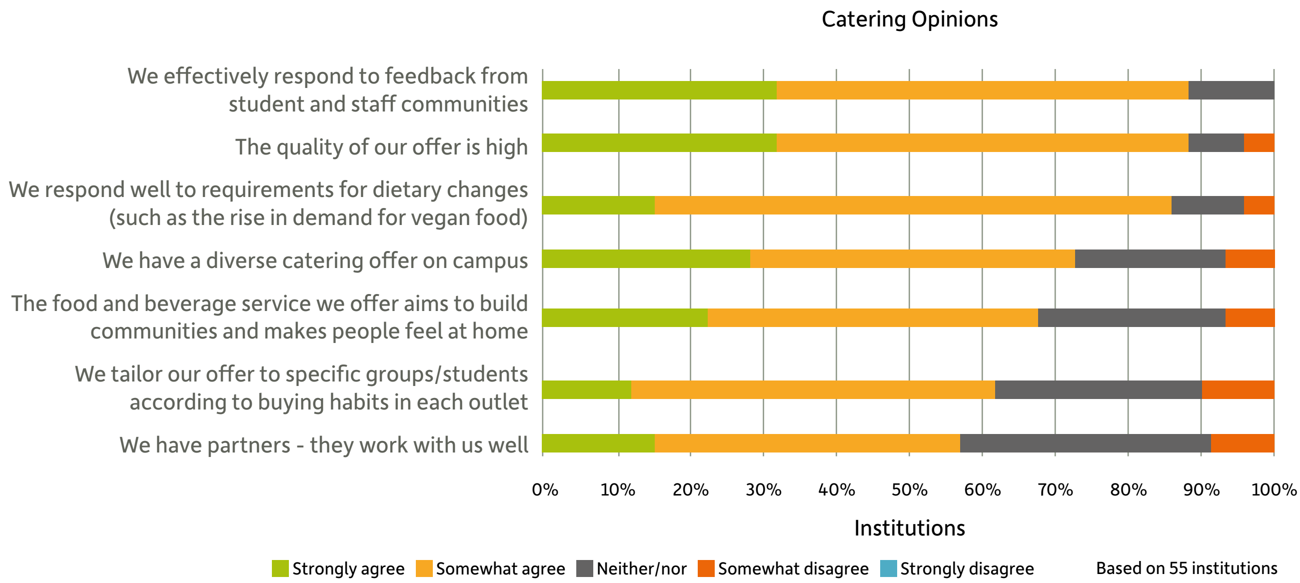
Based on 49 institutions

The number of outlets per institution naturally has a relationship to the size of the institution in terms of its turnover.

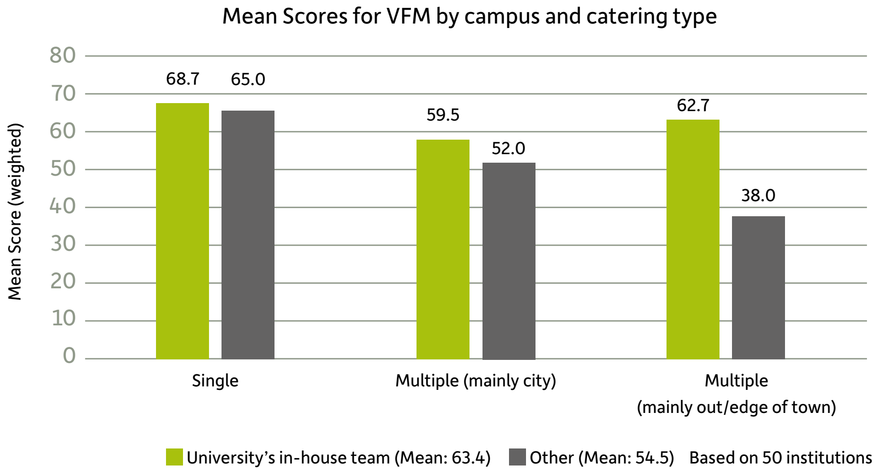


The number of 67% of respondents said catering had a remit to make a surplus, with only 7% reporting that catering is subsidised. The remaining institutions are remitted to break even.

Most respondents stated their catering offer was diverse and that they tailored their offer to suit specific groups or to match certain buying habits. There was broad agreement that the quality of catering on offer was high and that most catering services respond well to the changing dietary needs of students.



Respondents were asked to rate the value for money of their catering offer. Overall the aggregate average score out of 100 was 61.6, but scores vary significantly depending on whether the catering offer is run by an in-house team or outsourced, and by campus type as can be seen in the following chart:



The best value for money catering offer is achieved by single campuses where the offer is run in-house.

Where respondents did work with partner providers they stated this worked well but they did not always learn from these partnerships. There also seems to be tension between how to meet the needs and expectations of students and staff, how to engage customers in shaping the catering offer and how to balance commercialism with service provision. Some suggested solutions were offered in the form of more staff development, earlier engagement of key stakeholders at the design stage to ensure successful outcomes, better use of technology for click and collect and greater investment in business development roles.

As well as a continued push for more variety, other suggested improvements for catering are:

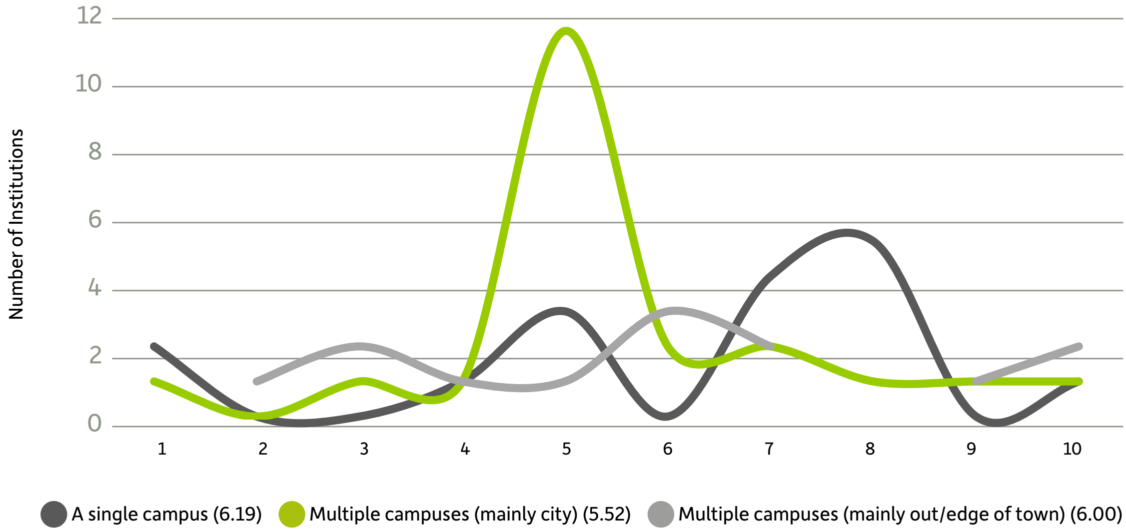
Catering: suggested improvements
(Based on 50 institutions)

- Clear strategy for improving customer experience
- Greater diversity of providers and offer
- Greater level of consumer engagement to meet differentiated need
- More investment/business development opportunities
- Greater ability to offer halal/vegan/dairy free options
- More pop-ups to trial trends
- Lower payroll to lower prices
- Centralised offer
- Multi-themed approach

Retail

This was the lowest ranked area of provision across all campus types with an average aggregate score of 5.86.

How well do you think your residential offer performs for your students?

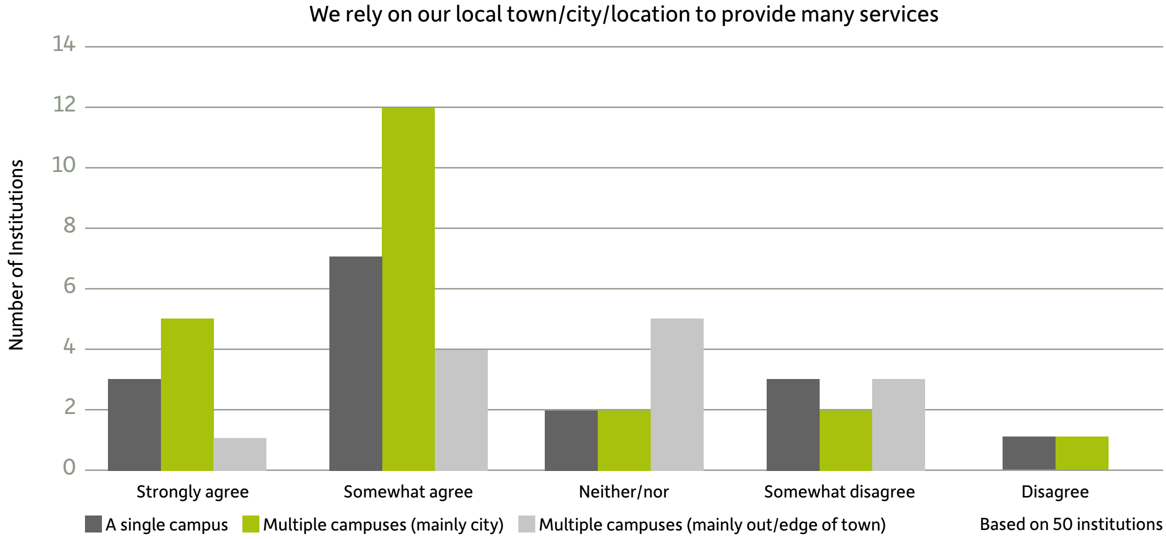


Based on 49 institutions

Single campuses score their retail offers better than multiple campus institutions (particularly multi-campus city based institutions), however there is great variation in the need to have a well developed catering offer between the two types of institution. Most single campus respondents said they tried to offer as many types of retail as possible, while the multi-campus city based institutions rely more on the locality to provide a retail offer and other ancillary services. Out of/edge of town multi-campus institutions expressed a very varied set of opinions about retail, implying that each will be influenced by the need to provide retail services in individual locations.

Based on 50 institutions

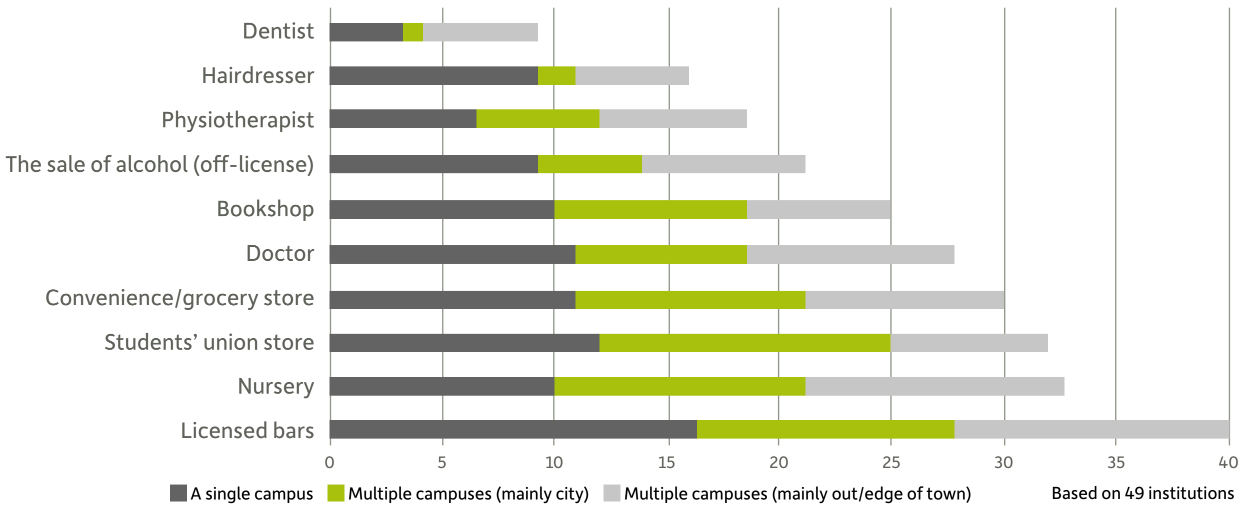
We rely on our local town/city/location to provide many services



Based on 50 institutions

There is a wide variety of stores and service offers across all campus types ranging from the provision of health services to food and drink stores, nurseries, bookshops and a prevalence of licensed bars.

Types of Stores and Services on Campus



Other services offered: banks, nurses, gift shops, newsagents, clothing stores, art materials, pharmacies, PC repair shops

Most respondents stated that they wanted an extended range of services with expanded retail provision offering more diversity and choice such as:

- Better mix of in-house and high street offer
- Modernisation of facilities
- Improving the customer journey across the campus retail offer by offering banking services/online delivery and collection points

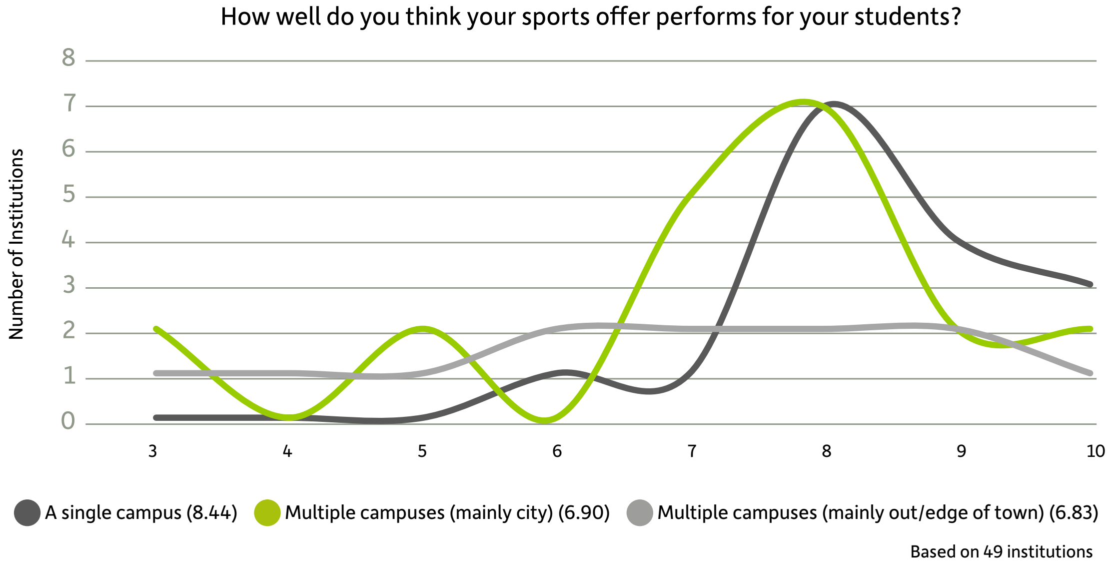
Those improvements requested by respondents differed slightly across campus types depending on how much integration was required with the existing in-house offer. A greater need for a more commercial and joined up approach to enable a more comprehensive retail offer was highlighted by some respondents.

Suggested improvements to Retail and Services: Campus Types

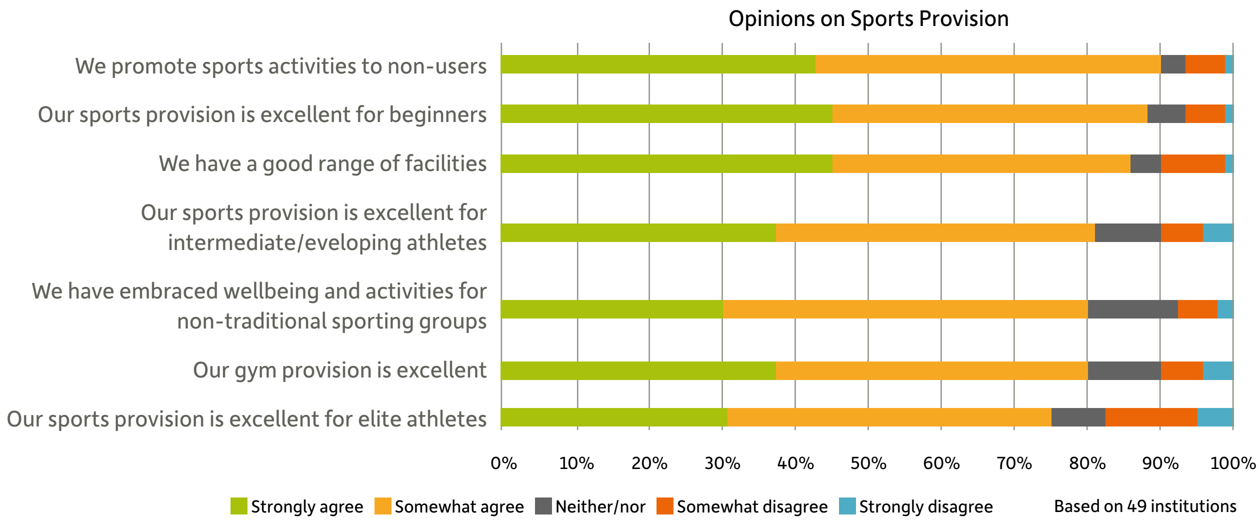
Single Campus	Multiple campuses (mainly city)	Multiple campuses (mainly out/edge of town)
• Have a wide range of services • Want more range • More bespoke retail and services such as Farmer's markets and tailored stores	• Larger range of mixed services wanted • Linking the high street offer with in-house services	• Want more consistency across sites • Want bigger and better spaces and offer

Sport

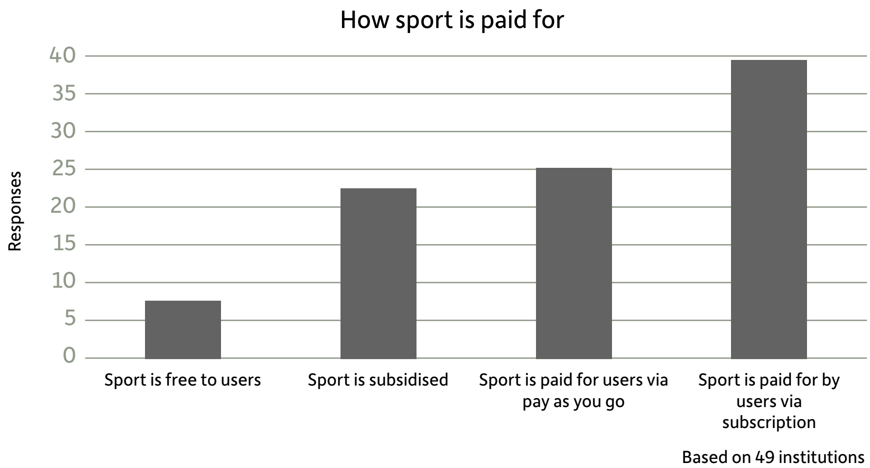
This was the highest scoring area across all respondents with an average aggregate score of 7.54. 84% of respondents strongly or somewhat agreed that they offer a range of sports facilities. Only one specialist institution said it did not have any sports facilities. Single campus institutions, where investment can be concentrated, scored much higher with an average score of 8.44 than the multi-campus institutions (which ranged from 6.8 to 6.9 out of 10).



There is a wide range of sports provision offered to all abilities, from beginners to elite athletes, across all campus types. Gym facilities seem good or adequate across all campus types, especially single out-of-town campuses, with only five respondents disagreeing. Over 90% of respondents were embracing the wellbeing agenda and promoting sporting facilities to non-users or those from non-sporting backgrounds (only three city centre campuses were not doing this), but some did say that the self-funding element of their brief can restrict their range in this area. Most respondents agreed they had a range of facilities with only five city centre campuses stating they disagreed.



The majority of provision being paid for by users with elements of subsidy.



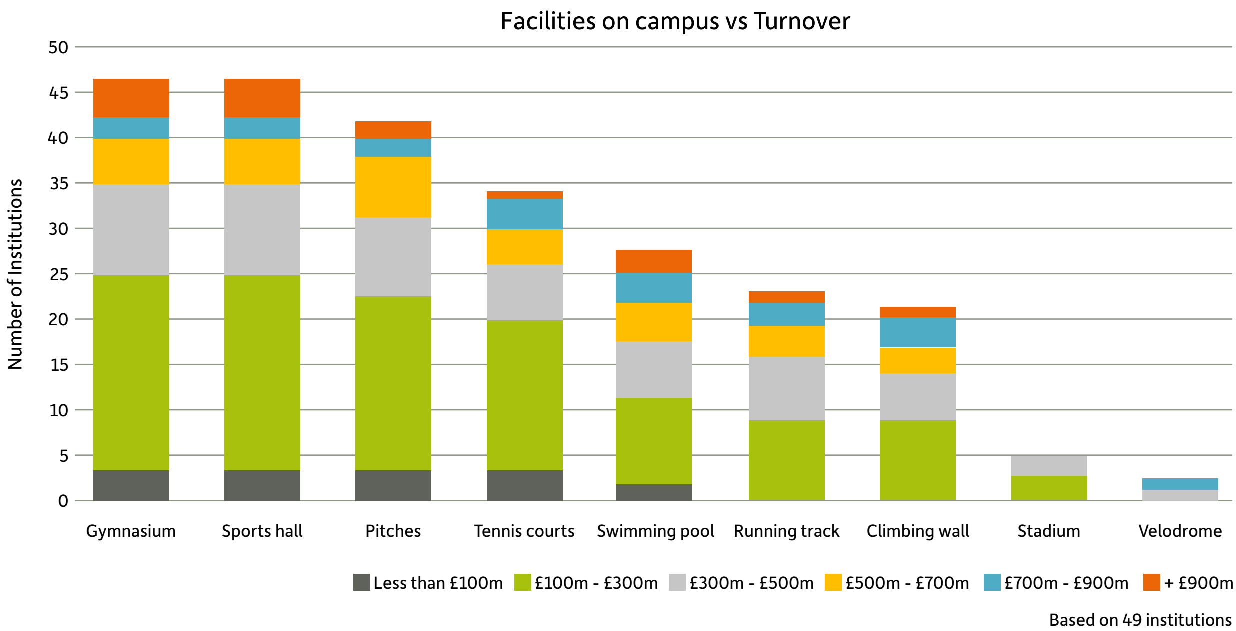
Other responses

- Mixture of all the above
- Overall subsidy but with varios PAYG elements
- Free off peak membership for staff
- External partners
- There is an element of free sport
- Enhanced sport is paid for by users

Currently only 9% of sport is subsidised through residential income and 14% by adding to the residential rent. Direct funding from the university is still the main form of subsidy but as this will probably decrease over time most respondents said they would be moving to a mixed model of funding in the future combining residential, PAYG and commercial income.

The most common facilities across all campus types are sports halls (46), gyms (40) and pitches (42) with over half having a swimming pool (27). Many other respondents said that a swimming pool was the most popular request from students if it was not available on their campus. Institutions also reported providing dance studios, rowing, lake activities and golf.

The following chart looks at the provision by institutional turnover, and highlights that there is a even spread of most facilities across most sizes of institution.



The improvements that most respondents wanted to their sporting facilities are:

- More space
- Modernised and improved facilities
- Expansion of offer
- More external partners on site

Best practice or going forward... a summary

Across all the four main campus services respondents were asking for a greater recognition of the integrated nature of the campus experience, and to 'move away from task based thinking in some institutions and departments', moving beyond the academic and linking more with the community/civic.

'greater awareness in the corridors of power that the experience is not limited to the academic... we need the development and enhancement of community elements'

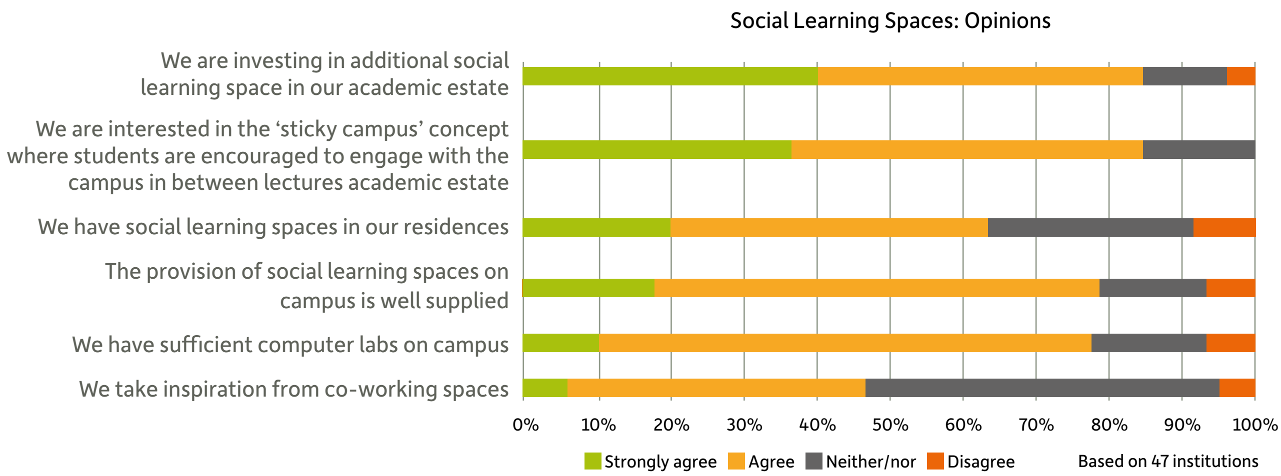
'a wider university understanding of the non-academic side of the university in terms of happiness, retention and well-being'

One very large university is investing in a broad range of projects not only across teaching and learning but *'those (spaces) which support the campus experience for both staff and students... with significant investment in student accommodation, landscaping and public realm, catering and retail outlets, social spaces for informal learning and signage, including heritage information'*

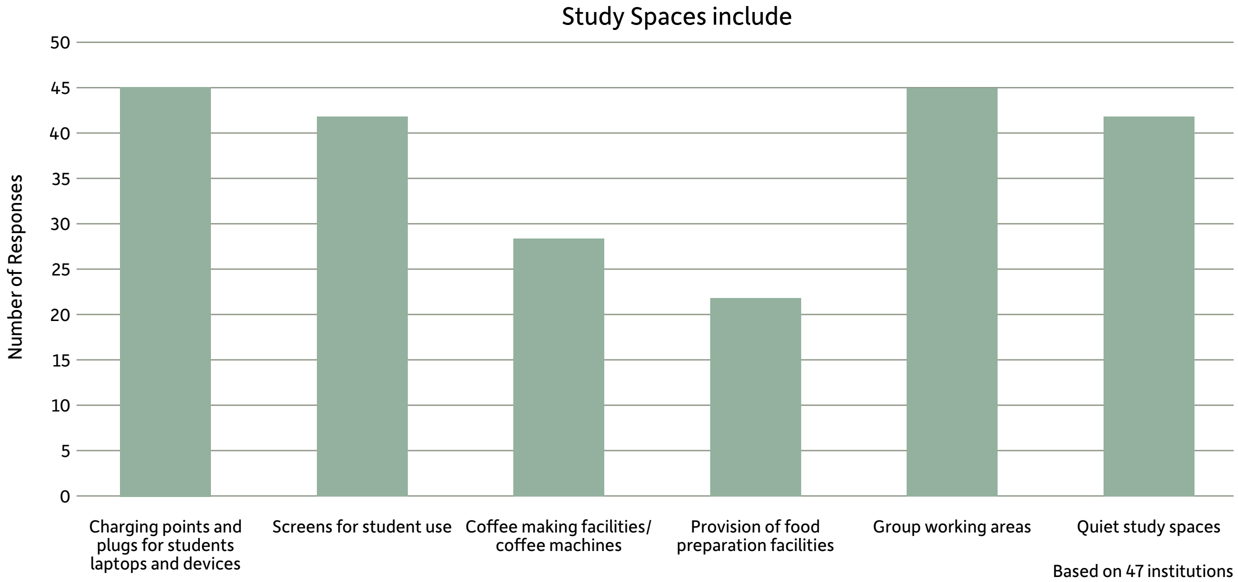
In summary campus officers would benefit from a stronger (more robust and collective) voice to share best practice and to advocate for targeted investment across the four areas, as all are working in a more competitive and commercial environment. They also indicate that greater agility and ability to forecast and respond to changing trends to meet the needs of a diverse and more demanding student body would be welcome.

Study spaces and opening hours

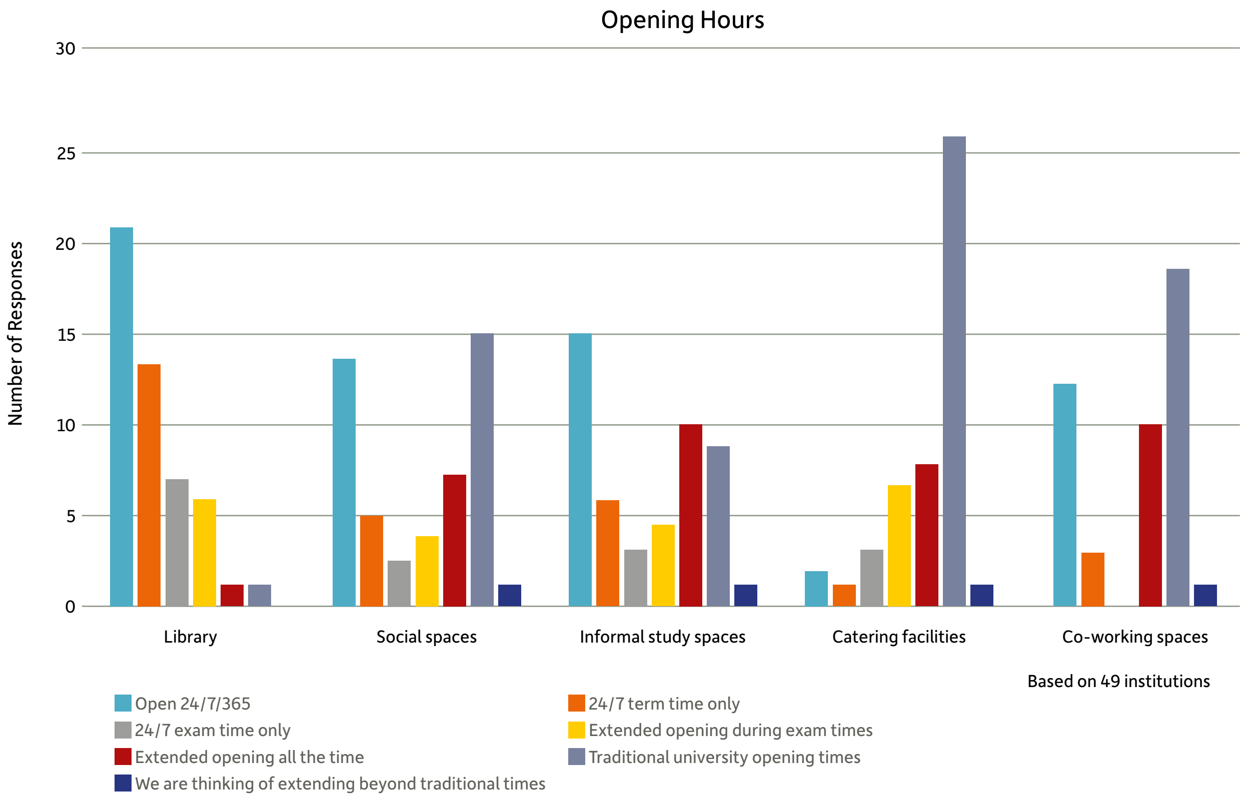
The majority of institutions are investing in social learning spaces. The sticky campus is interesting to institutions, encouraging students to use the campus in between lectures.



Study spaces include group working areas and charging points for devices, with additional provision in many cases of screens for student use. Quiet study spaces were also well provided for, however, the provision of coffee machines and food preparation facilities were less common.



Opening hours understandably vary widely across different elements of the campus, as shown in the chart below.

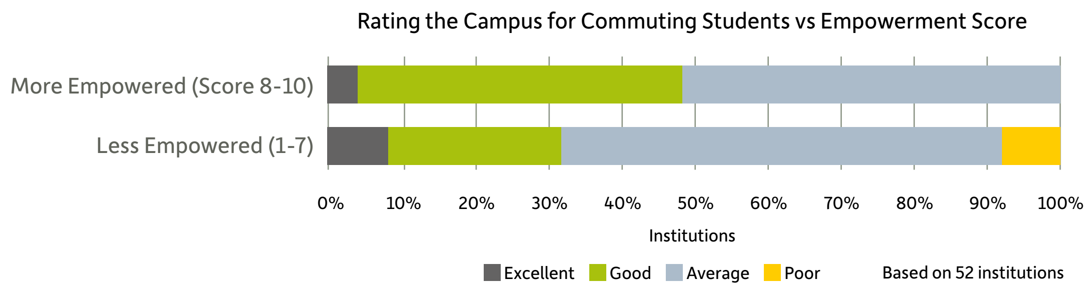


Commuting Students

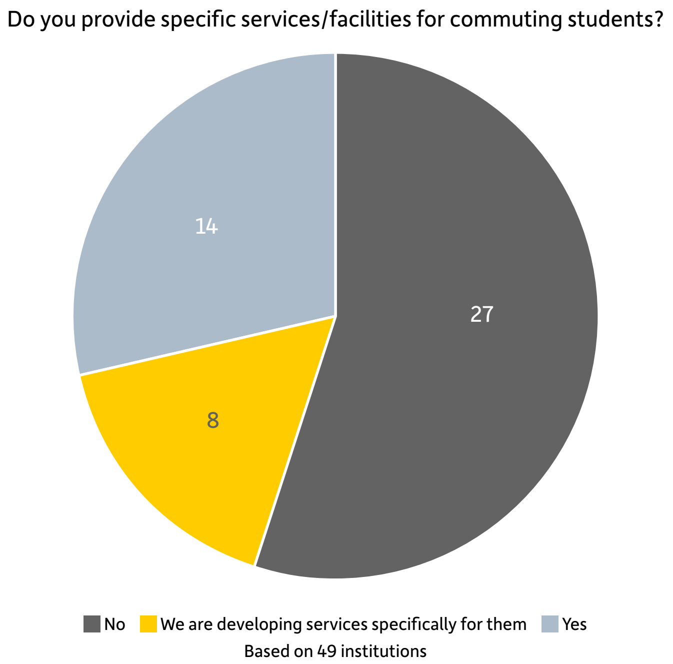
Following on from the analysis conducted by HEPI* on commuting students, this area was explored through a number of questions in the survey. When rating the campus by user group (see Section "Opinions on the Campus Experience") the group that was least well served by the campus was commuting students. Given their importance at many institutions with a local user base there are drivers for this situation to be improved over time.

**www.hepi.ac.uk/2018/12/13/homeward-bound-defining-understanding-aiding-commuter-students, HEPI, December 2018*

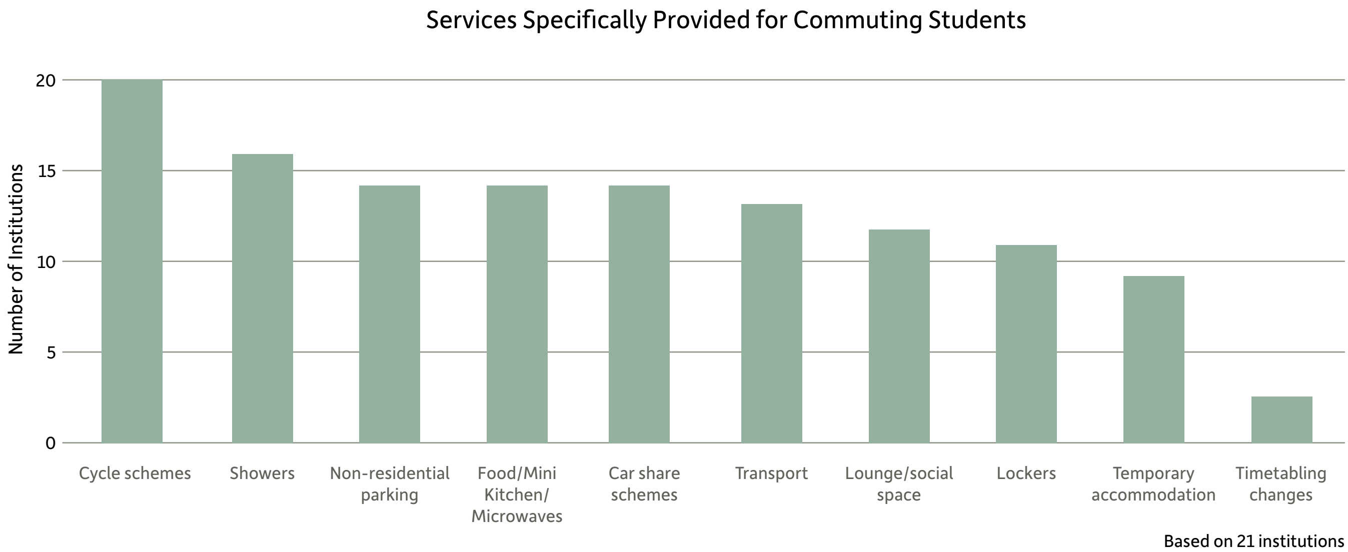
The more empowering institutions scored more favourably on this measure, with 13 institutions reporting good or excellent campus rating for commuting students compared to eight in the less empowered group, and none scored a poor rating in the empowered group.



Respondents were asked whether they are developing services or facilities, with 29% saying yes and a further 16% in the process of developing them. Clearly there is more to be done.

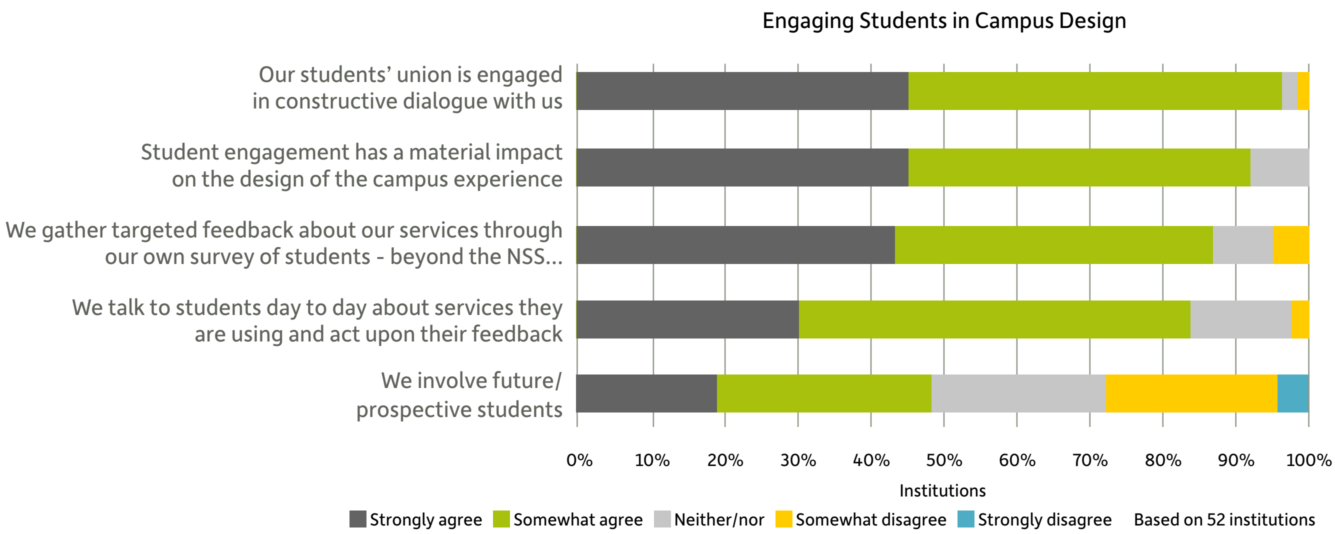


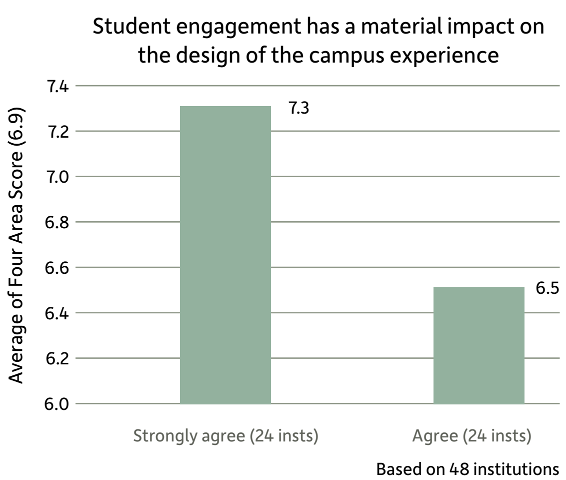
A question was therefore asked about what specific services have been or will be developed for commuting students. The main services were cycle schemes, with transport related facilities and schemes such as car sharing mentioned in a number of cases. Further initiatives such as providing storage and cooking facilities were also mentioned. A smaller number of institutions are providing temporary accommodation during exam periods and timetabling lectures to be on the same day in order to make the academic day more convenient for commuting students.



Engagement with Students

Institutions were asked the degree to which they engaged with students through a variety of means of feedback. Discussions at the pilot stage of the survey indicated that greater levels of engagement on the ground was material in enhancing services for students. The results are shown below.





Taking this analysis one step further, it is clear that those who engage with students to a greater degree achieve better scores across the four services areas than those that do not. This is a strong indication, as suggested in the pilot exercise, that student involvement in campus experience results in a greater level of campus performance.

Learning from Others

All the respondents indicated that visiting other universities was a great source of inspiration, but that the majority were also taking inspiration from a range of other customer-facing organisations.

Inspiration about service design can come from beyond the university itself. Do you gather ideas from other aspects of your experience to feed into the design of your campus services? If so where do you gain your inspiration?

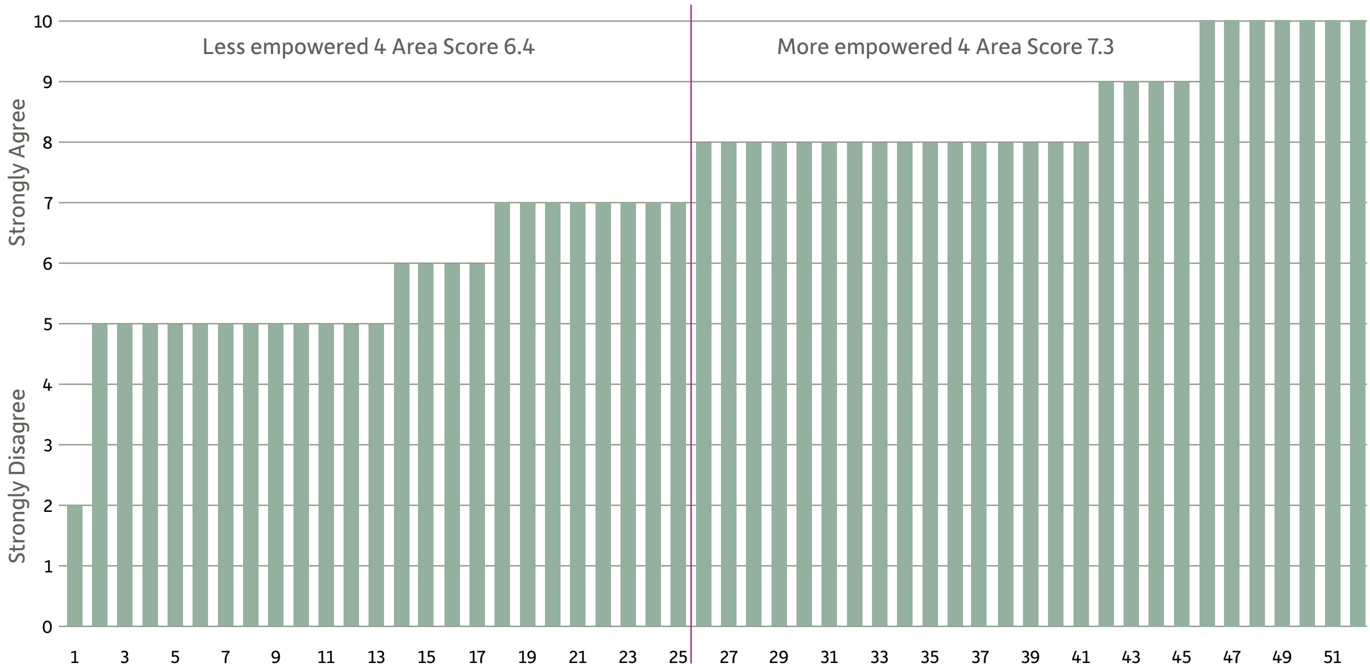
Based on 52 institutions
Percentage of institutions

Interestingly, those who felt more empowered were more likely to have taken inspiration from coworking establishments. The open text responses highlighted a much wider range of sources including airports, holiday villages and stadiums, food markets, exhibitions, conference centres, study tours, trade publications, trend surveys, a tech company's campus, and overseas visits.

Empowerment

One line of enquiry pursued in the survey was how empowered people and teams felt to deliver on the campus experience and react to student need. The scores for the 52 institutions that answered this question are below. They have been split into half with 27 respondents scoring eight or above (the more empowered group). This measure resulted from suggestions from the pilot consultations, and the analysis indicates that there is a correlation between the sense of empowerment and ability to drive initiatives.

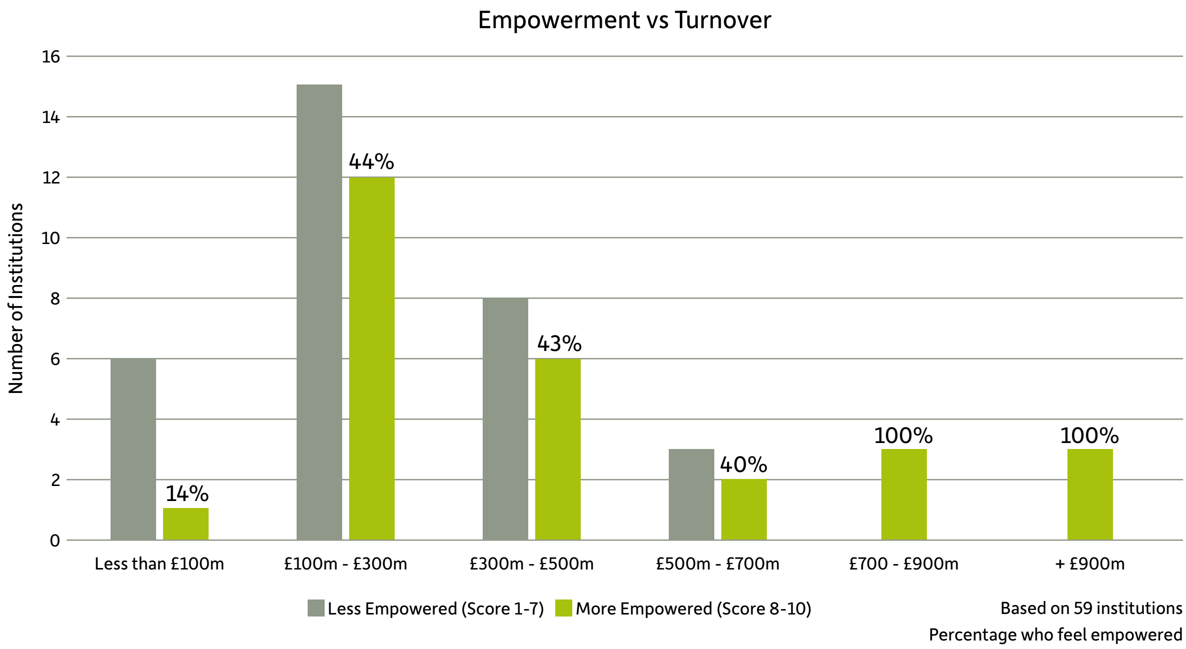
“I and my fellow staff are empowered to deliver on the campus experience, and to react to student need.”



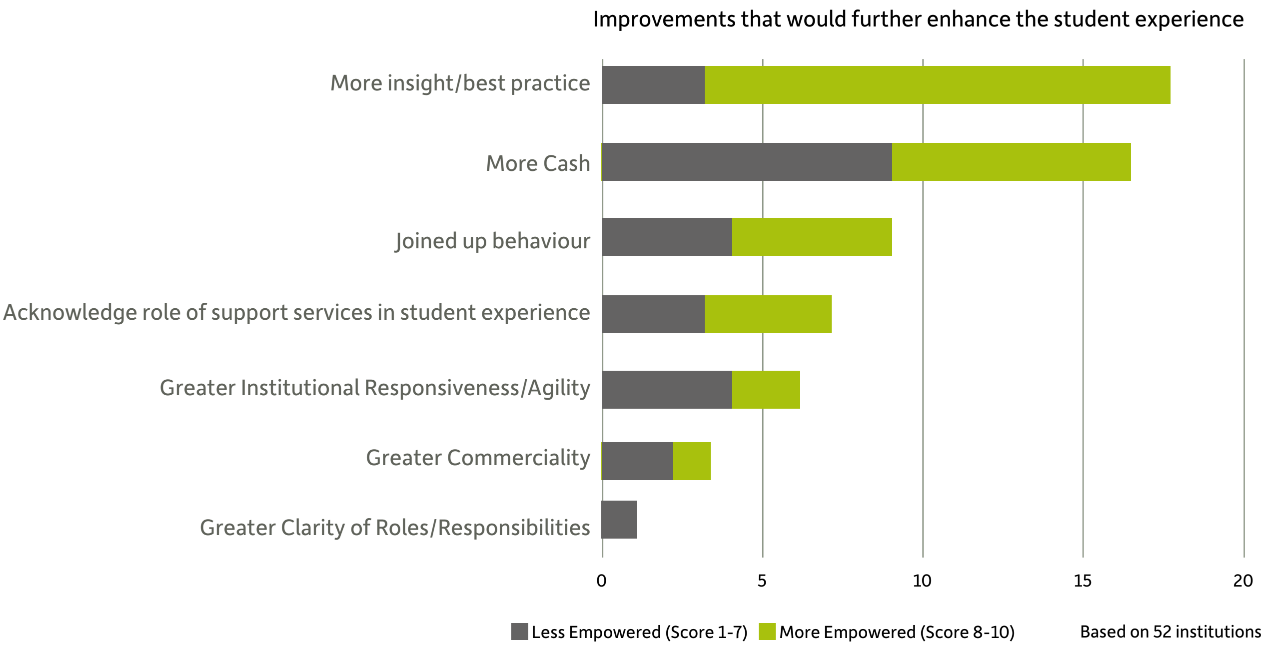
Based on 52 responses, 27 scored 8-10, 25 scored 2 – 7

Although the causality will never be clear from this survey, it can be seen that the self assessment score of the four areas of residences, retail, catering and sport was higher in the more empowered group (at 7.3 out of ten) as compared with the less empowered group (6.4). This suggests that respondents that have been empowered to make a difference in delivering on the campus experience are more likely to rate campus services more highly.

Exploring this further, the greater the size of the institution, the more empowered respondents feel. This may be related to the size or remit of a CUBO lead member role in a larger institution, or that there is a relationship between the empowerment of staff and the success of the institution.



The empowerment factor goes further, in suggesting that if respondents were empowered, they were more likely to require improvements to the student experience which were beyond requiring funding. The more empowered group required more knowledge and insight into market trends.



The group that felt less empowered was more likely to require funding and suggest the institution should be more responsive or agile to market conditions. Interestingly both groups made open text comments suggesting that institutions need to be more joined up across functions and wanted greater recognition or acknowledge that the support and management teams within organisations play an important role in the student experience.

Notes and Acknowledgements

Thank you to those institutions who took part in the survey.

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Anglia Ruskin University
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Falmouth: University of Exeter & Falmouth University
Goldsmiths, University of London
Harper Adams
Heriot-Watt University
Jesus College, Oxford
Keele University
Lancaster University
Leeds Beckett University
Liverpool John Moores University
London South Bank University Manchester
Metropolitan University
Newcastle University
Northumbria University
Nottingham Trent University
Oxford Brookes University
Queen Margaret University, Edinburgh
Queen Mary University of London
Queen's University, Belfast
Royal Agricultural University
Royal Holloway, University of London
Sheffield Hallam University
Southampton Solent University
Staffordshire University
Stranmillis University College
Swansea University
The University of Edinburgh
The University of Sheffield
The University of Warwick
The University of York
Ulster University
University College London
University of Aberdeen
University of Bath
University of Birmingham
University of Bristol
University of Essex
University of Exeter
University of Glasgow
University of Hertfordshire
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