



**The University of Exeter Survey of Decliners and Insurers (UG UK)
2011**

Summary Report

August 2011

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1. HEADLINE SUMMARY

1.1 Reputation related factors dominate the reasons to apply to the University of Exeter

The reputation of the University and our position in league tables were the most common reasons for applying with reputation in our subject area being the 6th most common reason, although 'softer' factors such as the attractiveness of our campus still remain important. Increasing in prominence this year is the importance of Open Days, which were of particular importance to Insurers, highlighting their importance to conversion.

1.2 Open Days are crucial in selling our key reasons to apply

Those who insured at the University were not only more likely to apply due to an Open Day experience but were also more likely to cite certain other factors, such as positive impressions of the area and a friendly atmosphere, as reasons for applying. This highlights the importance of organized visits in promoting some of our key strengths that are best experienced through visiting the University.

1.3 The level of our offer and our geographic location remain key reasons to decline

While the location of our campuses remained a deal-breaker for many applicants, particularly those to Cornwall, it was the level of our offer that forced most declines among Exeter campuses' applicants. That said, the fact that the most common reason to decline concerned the fact that our offer was too high for an insurance choice begs the question why we were not considered for first choice by these applicants. When this is the case, the other top reasons to decline, such as the campus environment, our league table positions and the nature of our courses, need to be investigated.

1.4 Level of offer is a main reason to decline, yet does little to convert or deter Insurers

While many applicants were initially attracted by our high entry requirements, the most common reason for declining was that our offers were too high to make us an insurance choice, with many applicants unsure whether they would achieve the required grades. Offer levels were less of a concern to Insurers, with reasons for insuring forming an active endorsement of the University, rather than something dictated by offer level. That said, our offer level did *sometimes* force a decision to make us the insurance rather than the firm choice if we were considered equally with a rival.

1.5 Early indicators suggest that the next cycle's £9k fees will do little to deter applicants

Those who deferred entry to 2012 were more likely to decline their offer due to the cost of our tuition fees than standard applicants. Although the cost of Exeter's 2012 fees was the fourth most common reason for declining among this group, it was rarely cited as the main reason for declining and most of these applicants ultimately selected another £9k institution, with none of them citing financial reasons for their decision.

1.6 Optimal waiting times lie within 4 months of application

In general, respondents became 'dissatisfied' after they had waited more than 4 months for their offer. However, satisfaction was heavily influenced by how competitor offer speeds compare to our own. To keep in line with our competitors, offers would have to be made within 3 months, with waits over 3 months falling short of respondent expectations.

1.7 Good expectation management can 'buy' an extra month of satisfaction

Applicants to subjects using the 'gathered field' approach were informed of potential waiting times and/or updated on their application's progress. Due to an improved accuracy of predicted waiting times this year, there was little evidence of one strategy being more effective than the other, although the difference between those who received no form of expectation management and those who did was clear, with those whose expectations were managed having levels of satisfaction equal to those of applicants who had waited one month less.

2. RECOMMENDATIONS

2.1 Comms should continue to focus on league table positions

Our recent improvements in various league table positions should be heavily publicized due to their importance to both applying and declining. In particular, our re-entry to the Times top 10 should feature strongly in comms as other research has indicated that the Times remains the most highly regarded league table. Subjects which performed well in league tables should also have their rankings publicised in comms. Other research has suggested that top 10 positions are not necessarily the cut-off point in high quality applicants' minds, but that any position within a top 15 or 20 may be worthy of mention.

2.2 Attendance at Open Days should be encouraged, with the weaker aspects of the day improved

Open Days featured in the top 10 reasons to apply this year and could become more important in the new fee environment as applicants will want to see what their money is buying for themselves. Attendance at Open Days should be encouraged through all channels, with reasons for non-attendance investigated and more dates scheduled if appropriate. The weaker aspects of the days, such as the information given in the talks, student involvement and scheduling of events need to be addressed.

2.3 Further investigation into reasons for declining is needed, with relationships with offer levels explored

Almost half of all decliners cited an offer level that was too high to make us their insurance choice as a reason to decline. This begs the question why we were not being considered on a par with these applicants' firm choices. Further investigation into the other most common reasons for declining may offer insight to this and, while we know these to be factors such as the campus environment, league table positions and our courses, further investigation into how these relate to offer levels and the draw of our competitors may provide an extra level of insight.

2.4 Comms surrounding £9k fees should be made widely available

The fact that several 2012 entrants mentioned £9k fees as a reason for declining yet then selected another £9k institution, suggests that, while £9k fees may not be a deal-breaker, there is still some concern regarding the issue. To combat this we should ensure that our fees booklet (which has already been praised in focus groups) is made as widely available as possible and that information surrounding fees is included at other important times in the decision making process such as Open Days and Offer-Holder Visit Days (OHVDs).

2.5 We should endeavour to make offers within 4 months of application and apply expectation management where possible

With the gathered field approach rolled out across more subjects each year, making timely offers will become more of a challenge. Despite this, the 4 month deadline should be kept in mind when setting timetables for offer making and expectation management should be rolled-out across all subjects. We should also make every effort to provide accurate information regarding predicted waiting times as this year's improvements in accuracy are reflected positively in applicants' responses.

3. INTRODUCTION AND METHODOLOGY

- This is an annual survey of those Home UG¹ applicants who declined our offer. Those who insured at Exeter are also included where stated.
- Fieldwork took place after the UCAS decision deadline of 6th May 2011 and lasted for about a month.
- The survey was conducted online, with our Decliners and Insurers sent an email invitation which contained a link to a questionnaire which contained a mix of 30 multiple choice and open ended questions.
- 1760 Decliners took part, with the response rate being 22.0% (response rate among Insurers was 35.6%).
- The profile of respondents was broadly in line with that of those contacted, although there was a slight female bias in the respondent data. This means that the data was representative of all Decliners and Insurers, allowing confidence in the analysis.
- In terms of subject applied for, the profile of respondents was again broadly in line with that of all those contacted.

Please refer to Appendix 3.1 for full sample breakdown.

¹. Application status is based on domicile rather than fee status. PG & International students are covered in another survey in the autumn.

4. DECISION TO APPLY

4.1 Most common reasons to apply

Respondents were asked their reasons for applying to Exeter.

Table 4.1.1 Reasons for applying

Decliners Rank (vs 2010)	Which of the following influenced you to include the University in your UCAS application?	Decliners		
		Total	Exeter	Cornwall
	<i>Base</i>	1664	1545	119
1(1)	Reputation of the University of Exeter	67.6%	67.6%	67.2%
2(2)	Exeter's position in league tables	59.8%	60.5%	51.3%
3(3)	Attractive campus / environment	50.5%	50.8%	47.1%
4(4)	Nature and scope of the course	45.6%	45.2%	51.3%
5(=6)	University prospectus	41.2%	40.7%	47.9%
6(=6)	Reputation in my subject area	38.2%	38.0%	40.3%
7(11)	Open day / visit	33.2%	33.9%	24.4%
8(=7)	Geographic location	32.2%	32.2%	31.1%
9(=7)	High entry requirements	30.2%	30.7%	23.5%
10(-)	Wanted a campus university	30.0%	30.1%	29.4%

Reputation related factors dominated the reasons to apply, with 'Reputation of the University', 'Position in league tables', 'Reputation in subject area', and 'High entry requirements' all featuring in the top 10. Despite this, 'softer' factors remain important, with 'Attractive campus/environment' remaining the third most common reason to apply.

'Exeter's position in league tables' was more of an incentive to apply among our Exeter as opposed to our Cornwall applicants, especially among those who eventually insured at the Exeter campuses. Open Day experiences and respondent's impressions of the city/area (#12) (presumably also experienced at Open Days) were also a greater motivator to apply to Exeter than Cornwall (although a lower proportion of respondents may have visited Cornwall due to its geographic location).

It was Insurers rather than Decliners who were more likely to mention an Open Day experience as a reason for applying, thus highlighting the importance of Open Days to conversion. Insurers were also more likely to mention 'Friendly atmosphere' (#11) and 'Impression of the city/area', again aspects which were most likely experienced at an Open Day.

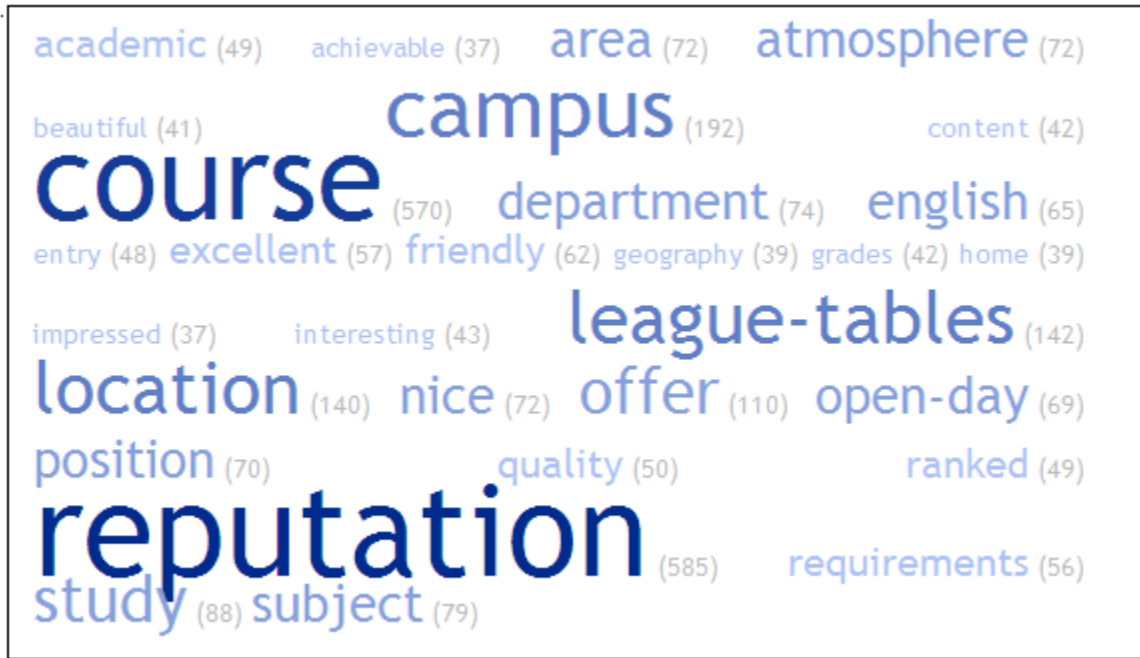
Compared with last year's results, Open Days have increased in their relative importance, ranking #7 in 2011, compared to #11 last year. Despite the pull of Open Days, 'Impression of the city/area' (#12) has diminished in its relative importance perhaps indicating a decline in 'softer' factors in favour of more 'hard-nosed' decision making.

Please refer to Appendix 4.1 for a full analysis of reasons to apply.

4.2 Main reason to apply

Respondents were asked their main reason for applying. The question was open-ended allowing respondents to elaborate on their answers. Full answers are given in Appendix 2.

Figure 4.2.1 Main reason to apply



Reputation / league tables: The University as a whole was seen to have a good reputation, with many respondents mentioning league tables as a specific measure of reputation. The reputation of our courses and subject rankings were equally important.

Exeter has a reputation as a very good university, and is high on league-tables for both my chosen subject area and the university in general (Cornwall Decliner, Zoology)

Course / subject: Respondents praised the nature and scope of our courses, saying how well they suited their interests and ambitions.

The course specified in the areas of psychology I was interested in including forensic psychology, clinical psychology as well as the option of work experience (Exeter Decliner, Psychology)

Location / area: Distance from home/family were often mentioned, although many people liked the location of the University with regard to beautiful countryside and coastline. Several Geography applicants saw this as particularly beneficial to their studies.

Exeter would be an excellent choice with the met office being so local. Also the fact the Exeter is in such a rich area geographically; near the Jurassic coast, British coast line and in a relatively rural area, I felt as though I would be fully able to maximise these benefits- for example with research and residentials for my degree (Cornwall referral (Decliner), Geography)

Campus: Our campuses were praised for their location, facilities and friendly atmosphere.

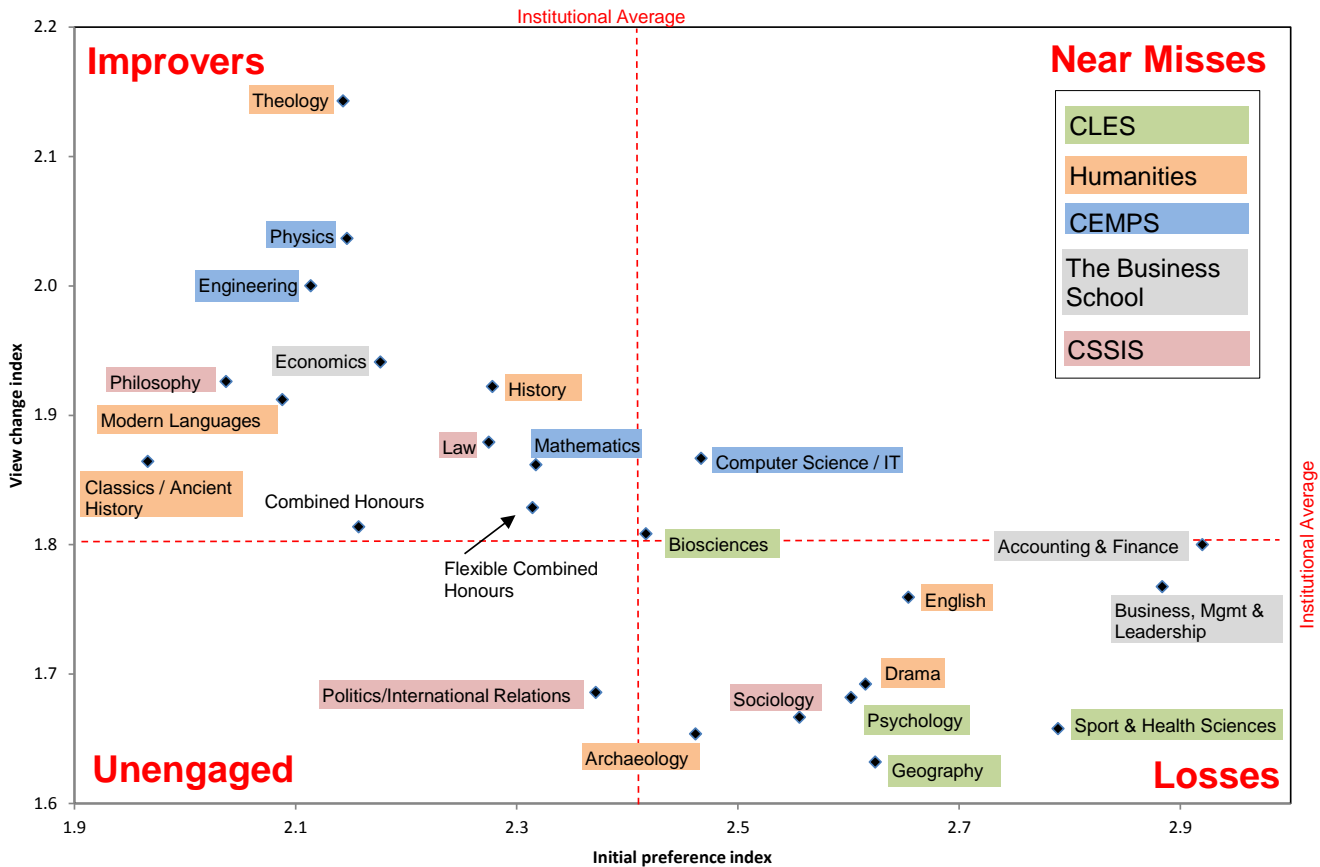
Friendly, attractive campus near the coast with excellent accommodation with spectacular views (Exeter Insurer, Physics)

5. FINAL DECISION

5.1 Propensity to accept

Respondents were asked where the University had featured in their order of preference when they had initially applied (1st / 2nd choice, somewhere in the middle, towards the bottom) they were then asked how their opinion had changed between then and their final decision (more positive, more negative, did not change). Their selections were then converted into indices and summarised in the figure below. Please see Appendix 5.1 for data and for reasons why views worsened.

Figure 5.1.1 Propensity to accept



Losses: Applicants to these subjects initially had a high preference for the University however, since applying, the University fell in their estimation. Subjects falling into this category may benefit from a review of post-application comms and their POOD strategy.

I had high expectations of the university but was let down by the open-day and decided it wasn't right for me. (Exeter Decliner, Classics / Ancient History)

Improvers: Applicants to these subjects initially had a relatively low preference for the University, although this had improved before their final decision. Strong post-application comms and positive POOD experiences may have benefited these subjects and best practice may be identified among this group.

I applied chiefly because I was unsure of what university to have as my fifth choice and my parents and various Exeter students advised me to apply. (Decliner Exeter, Politics and Philosophy)

Unengaged: Applicants to these subjects had an initial low preference toward the University and we failed to change this. Both pre-application and post application comms should be strengthened among this group.

I hadn't been sure about Exeter to begin with, but I came away from the post offer open-day and didn't really feel it was the place for me. (Exeter Decliner, Arab & Islamic Studies with Spanish)

5.2 Timing of decision

Respondents were asked at what point in the process they had made their decision.

Table 5.2.1 Point of decision making

Point of decision making	Decliners				Insurers			
	Total	Exeter	Cornwall	Cornwall referral	Total	Exeter	Cornwall	Cornwall referral
<i>Base</i>	1704	1523	114	67	605	515	64	26
After visiting the University of Exeter	6.9%	6.9%	7.9%	6.0%	3.5%	2.7%	7.8%	7.7%
When I had received an offer from Exeter	4.8%	4.3%	2.6%	19.4%	1.8%	1.2%	0.0%	19.2%
When I had visited another university	12.9%	12.3%	21.9%	9.0%	19.8%	19.2%	26.6%	15.4%
When I had received an offer from another university	21.0%	22.1%	10.5%	13.4%	36.5%	38.3%	26.6%	26.9%
When I had received all my offers	51.0%	50.7%	54.4%	52.2%	22.8%	23.3%	17.2%	26.9%
I never intended to accept an offer from Exeter	3.5%	3.7%	2.6%	0.0%	15.5%	15.3%	21.9%	3.8%

When compared to their Cornwall counterparts, a higher proportion of Exeter respondents made their decision once they had received an offer from another (single) university, suggesting that Exeter applicants were more likely to be predisposed to particular universities early on in the process (Oxford, Cambridge). A higher proportion of Cornwall applicants made their decision once they had visited another university.

Those who were referred to Cornwall were more likely to make their decision once they had received their offer from Exeter, indicating that many did not consider the Cornwall Campus as a serious alternative.

Compared with last year, higher proportions of Cornwall respondents made their decision later on in the process (when they had received all their offers) suggesting that the campus is becoming a more serious consideration for many.

Please refer to Appendix 5.2 for a further breakdown of the data.

5.3 Reasons for declining

Respondents were asked their reasons for declining.

Table 5.3.1 Reasons for declining

Rank (vs 2010)	Reasons for declining	Total	Exeter	Cornwall	Cornwall referral	Deferred entry (£9k fees)
	<i>Base</i>	1659	1478	115	66	45
1(1)	Offer too high to make Exeter my insurance choice	46.8%	48.2%	37.4%	31.8%	60.0%
2(2)	Distance from home	28.5%	26.0%	52.2%	42.4%	26.7%
3(4)	Uncertain whether I would achieve the grades required	18.3%	18.3%	22.6%	12.1%	24.4%
4(3)	Geographic location	17.1%	14.6%	37.4%	37.9%	20.0%
5(5)	The campus environment wasn't right for me	16.3%	15.2%	22.6%	30.3%	17.8%
6(7)	Exeter's position in league tables	15.4%	16.6%	6.1%	3.0%	8.9%
7(6)	Nature and scope of the course	14.8%	14.1%	15.7%	28.8%	13.3%
8(8)	Impression of the city / area	11.5%	11.0%	16.5%	13.6%	11.1%
9(9)	Experience at an Open Day	11.4%	11.8%	8.7%	6.1%	11.1%
10(15)	Reputation of the course / department	10.3%	10.6%	6.1%	10.6%	6.7%

The level of our offer played a significant role in most respondents' decisions to decline. 'Offer too high to make Exeter my insurance choice' was easily the top reason for declining, with 'Uncertain as to whether I would achieve the grades required' being the third most common reason. Our location was another major reason, with geographical factors accounting for the second and fourth most common reasons.

'Geographic location' and 'Distance from home' were more of a concern to Cornwall than Exeter respondents. Among Exeter campuses' respondents were more likely to decline due to their offer being too high to make their insurance choice or due to reputational factors such as our position in league tables and general reputation (#14).

Since last year the reputation of the course has become more important relative to other factors.

Those who applied to Business Schools subjects or Psychology were the most likely to have concerns over the level of their offer, either stating that it was too high to make Exeter their insurance or that they were unsure whether they could achieve it. It was those who applied to some of the more vocational subjects such as Economics, Engineering and Law that had the most concerns about reputation with relatively high proportions of them declining due either to our positions in league tables or due to subject reputation. Those who applied to Philosophy or Drama were more likely to decline due to an Open Day experience or to the nature of their course. The course was also an issue for Archaeology students who were among the most likely to claim that our course information was not up to the standard of our competitors (#12).

Although those deferring entry to 2012 were more likely to decline due to the level of our offer, they were also more likely to decline due to the cost of tuition fees (#22).

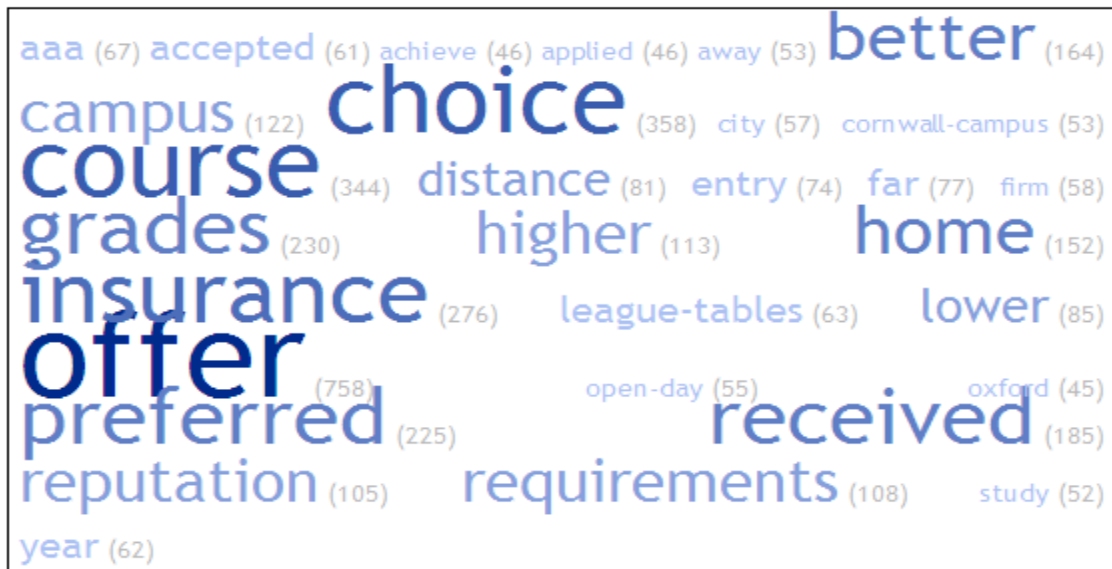
Those whose offers had been referred to Cornwall were more likely to decline due to the Geographic location of the campus, the nature of the Cornwall courses and factors such as the campus' environment and social facilities.

Please refer to Appendix 5.3 for a full breakdown of the data.

5.4 Main reason for declining

Respondents were asked their main reason for declining. Full responses can be found in Appendix 2.

Figure 5.4.1 Main reason for declining



Insurance / choice / offer / grades: Respondents found that the level of our offers was too high to make the University their insurance choice. Some were also unsure if they could achieve the required grades.

"I had already had chosen my preferred university, it was a matter of which university would be my insurance, and unfortunately the grades i was offered from Exeter were to high for that place." (Exeter Decliner, Anthropology and Sociology)

Course: Respondents stated that our courses were not as engaging as they had first hoped or found that they preferred the courses of our competitors.

"The course at another university was more suited to my interests in the subject, and was outlined in much greater depth on their website. Within the course is a built in sandwich year for work experience which really appealed to me also." (Exeter Decliner, Psychology)

Preferred: Many respondents stated that they had preferred our competitors. While some mentioned preferences in terms of courses, most did not mention a reason for their preference.

"I had received an offer from Durham which for a long time I had always wished to go to. It was very difficult deciding between Exeter and Durham but in the end I decided that as I had always dreamed of going to Durham I would go there." (Exeter Decliner, Archaeology)

Distance / home: The distance of the campuses from the respondents' homes was a deal-breaker for many, with most saying that the University was too far away.

"I live in the north west, although I am interested in moving away from home. I felt as if Exeter was perhaps a little too far. I was concerned about how I would get to and from the university as it would cost a lot in petrol and would require an overnight stay in a hotel. My parents also said it wasn't very practical. So I went for ones a little closer...." (Both campuses, Decliner, Law)

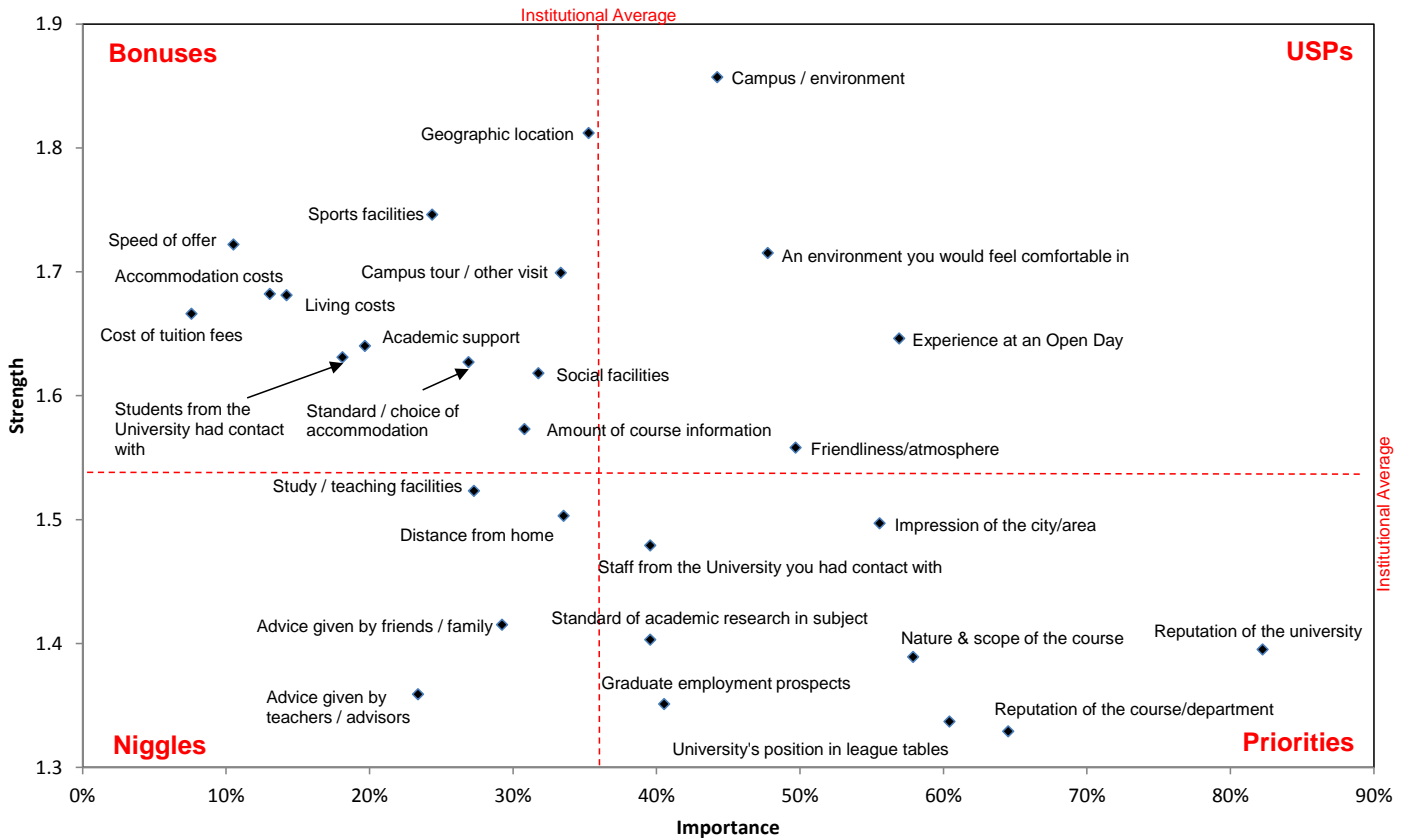
Campus: Respondents stated either that they decided that they did not want to study at a campus university, that they did not like the location of our campuses with regard to local amenities or that they did not like the feel of our campuses.

"I did not enjoy my experience of the campus. It was simply a matter of personal preference that I would rather be on a campus located more centrally to a city. I also didn't like the choice of 'restaurants' and social facilities on campus." (Exeter Decliner, English)

5.5 Perceptions of the University among our insurers

Respondents who had made the University their insurance choice were given a list of factors and asked to select those that were the most important to their decision. They were then presented with their selections and asked whether Exeter or their firm choice was stronger in each area. Figure 5.5.1 below compares their answers. See Appendix 5.5 for full data.

Figure 5.5.1 Insurers' Perceptions – Exeter campuses



USPs (Unique Selling Points) – Aspects in this area were of relatively high importance to our Insurers' decisions and were where Exeter rated relatively highly compared to respondents' first choices. Our USPs tended to be the 'softer' factors that are best experienced on an Open Day, highlighting the need to encourage formal visits.

Priorities – These aspects were relatively important to decision making yet were where Exeter was seen as weaker than respondents' first choices. Whilst some academic factors are Priorities, the groups is dominated by reputation related factors.

Bonuses – These aspects were of relatively low importance, yet were areas where Exeter performed relatively well in comparison to respondents' first choices. Bonuses include Sports facilities, Academic support and our offer speed.

Niggles – These were aspects of low importance to decision making and were where our performance was relatively weak. Advice from third parties falls into this category, possibly due to a lag in awareness of our improved reputation.

Exeter vs Cornwall – Two areas differentiated the impressions of the Exeter and Cornwall campuses: Firstly the campus itself, with Exeter applicants having a better perception of social and sports facilities. That said, Cornwall respondents found the standard of accommodation more important, with this being seen as a USP for Cornwall. While the campus/environment of Exeter was a USP, at Cornwall it was a Priority for improvement. Distance from home was more important to Cornwall respondents, who perceived Cornwall's offering less favourably than their Exeter counterparts. While Impression of the city/ area was a Priority for improvement at Exeter, at Cornwall it was a USP.

5.6 Insurers: the role of our offer level

Respondents were asked how their offer from their first choice had compared to their offer from the University of Exeter. Results are summarised below, with a full breakdown in Appendix 5.6

Table 5.6.1 Level of offer - Insurers' firm choice vs University of Exeter

How firm choice offers compared to those from the University of Exeter	Total	Exeter	Cornwall
<i>Base</i>	603	505	63
Much higher	8.0%	8.1%	7.9%
Somewhat higher	41.0%	40.4%	46.0%
About the same	51.1%	51.5%	46.0%

About half of Insurers claimed that the offer they received from their first choice was 'about the same' as their offer from Exeter, with the other half claiming that it was 'higher' (with 8.0% claiming that it was 'much higher'). Cornwall insurers were more likely to claim that the offer from their first choice was higher than that they received from Exeter, reflecting the slightly lower entry levels of the campus.

It was our numerate or scientific subjects that were the furthest behind respondents' first choices in terms of offer level, with applicants to Mathematics, Engineering and Biosciences more likely to claim that their first choice had given them a higher offer.

Cambridge, Oxford, Bath and Warwick were the institutions which gave the highest offers to applicants who insured at Exeter.

Since last year there has been an increase in the proportion of Cornwall Insurers who accepted higher offers from their firm choice, perhaps reflecting a more prestigious competitor set now considered by Cornwall applicants.

163 respondents said that there had been other differences in the offers received from Exeter and their first choices, with easily the most common difference being the requirement for particular grades in specific subjects (with competitors usually having more stipulations than Exeter). Other differences included whether certain subjects were accepted at A level and extra qualifications such as STEP papers for Maths at Warwick and Bath.

"It relied on achieving a specific grade in History and all four of my A-Levels based on grades. Whereas Exeter only required 360 ucas points from any 3 A-levels" (Exeter Insurer, History, Cambridge accepted)

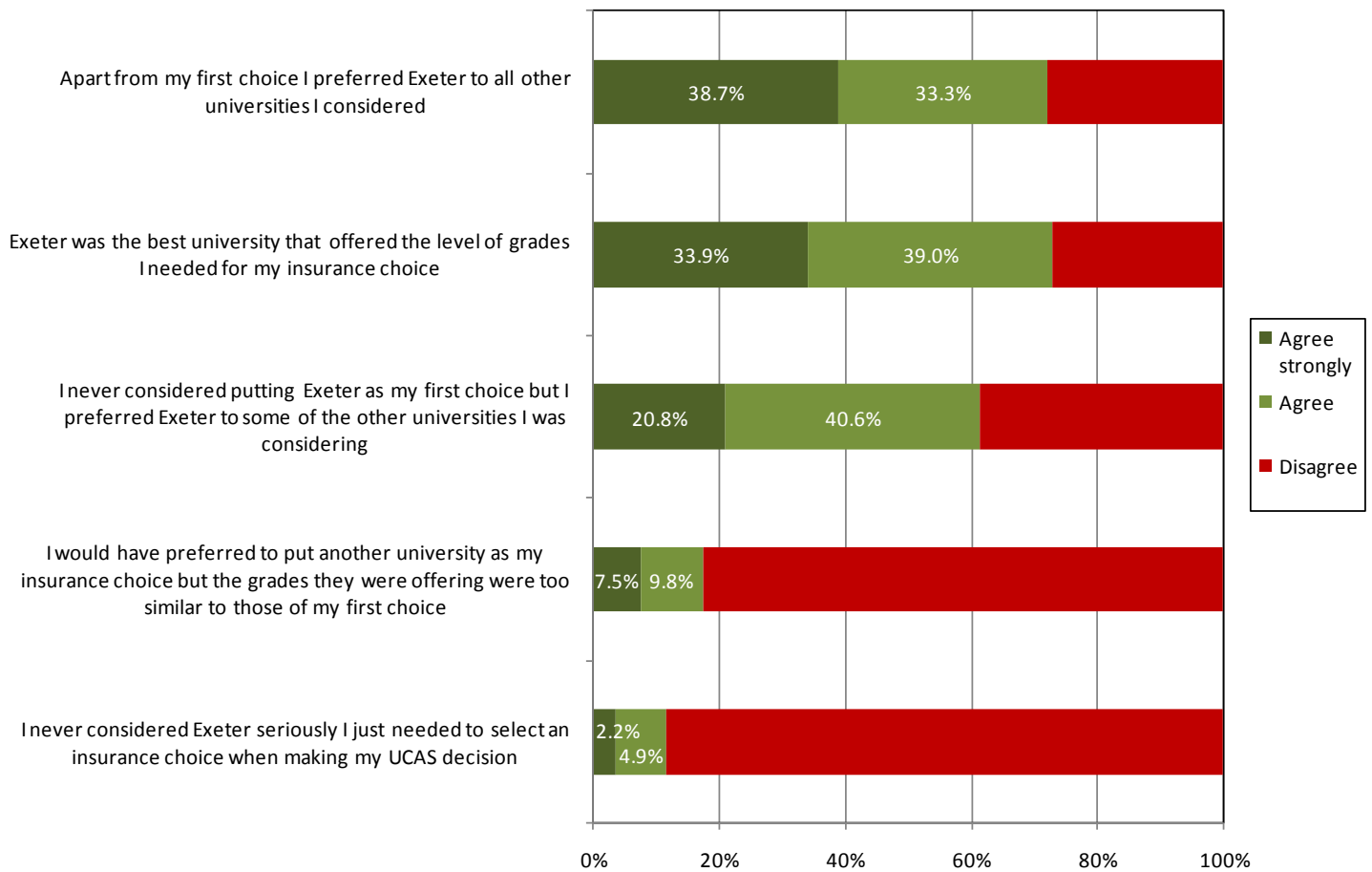
"Warwick needed physics whereas Exeter did not" (Exeter Insurer, Engineering, Warwick accepted)

"STEP paper, and A* in maths. A* in further maths required depending on STEP grade" (Exeter Insurer, Mathematics, Warwick accepted)

For full details of differences to offer specifications, please contact j.a.wells@exeter.ac.uk

Respondents were asked whether they agreed or disagreed with a number of statements about the level of Exeter's offer and its importance relating to other factors in the decision making process. Results are summarised below but please also see Appendix 5.6

Figure 5.6.2 Insurers – Role of offer



The data suggests that putting Exeter as an insurance choice was an active endorsement of the University rather than a choice that had been dictated by offer level alone.

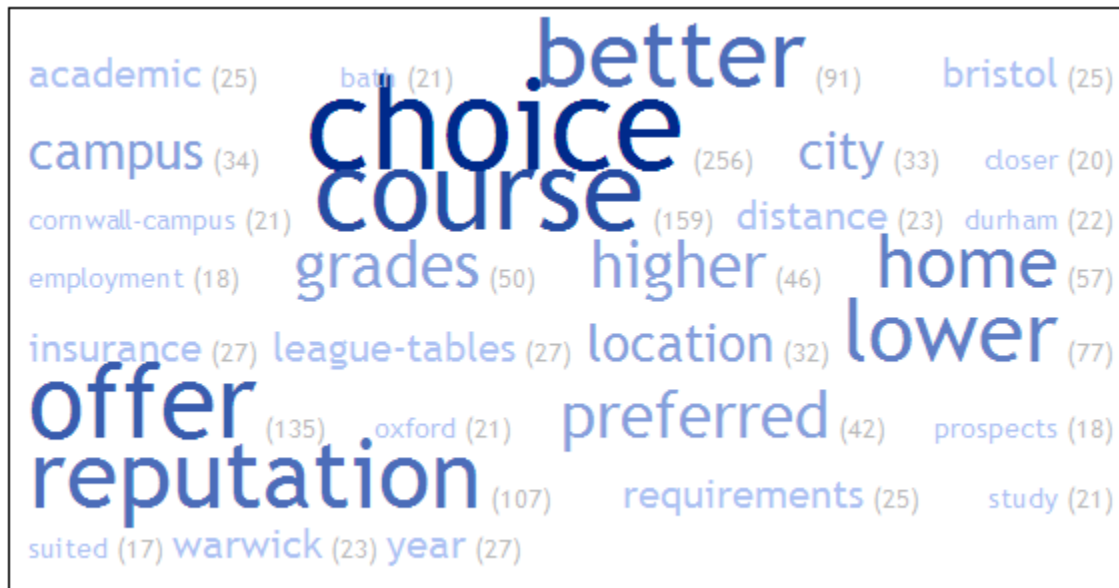
There were few differences between the campuses, except for the fact that Cornwall Insurers had a slightly higher level of agreement with the statement about the University never being a serious consideration, perhaps due to applicants expecting a lower offer from the campus.

Among Exeter campuses' Insurers, there was a lower level of agreement with the statement about the University never being a serious consideration compared with last year, suggesting that our offering is now seen as more desirable. Among Cornwall Campus Insurers however, the reverse was true, although this could reflect the campus' changing competitor set.

5.7 Main reason for making Exeter the Insurance rather than the firm choice

Respondents were asked their main reason for putting Exeter as their insurance rather than their first choice. A summary of their answers is given below, with full responses given in Appendix 2.

Figure 5.7.1 Main reason for insuring at the Exeter campuses - Summary



Course: Respondents preferred the nature of the courses offered by their first choice, with years abroad and employment prospects often mentioned in association.

"Bath University offers a sandwich course with a compulsory full year of placement in the Third year of the course which I thought would be very valuable in the future. The courses between Bath and Exeter were very similar...but it was the placement which swayed me." (Exeter Insurer, Psychology)

Offer / lower: Some respondents stated that Exeter had given them a lower offer than their firm choice, so making us insurance was a logical step.

"I found it difficult to choose between two universities, and as Exeter's offer was slightly lower it seemed sensible to choose as my insurance. It was my lowest offer so otherwise I would not have had an insurance." (Exeter Insurer, English)

Reputation: The reputation of respondents' firm choices was felt to be better than that of Exeter. Respondents made reference to league tables as well as the link between reputation and graduate employment prospects.

"Edinburgh is higher in the league-tables and has a more established academic reputation." (Exeter Insurer, Philosophy and Theology)

Home: Some respondents felt that our campuses were too far from their homes, particularly Cornwall. Some mentioned other geographical considerations such as proximity to London.

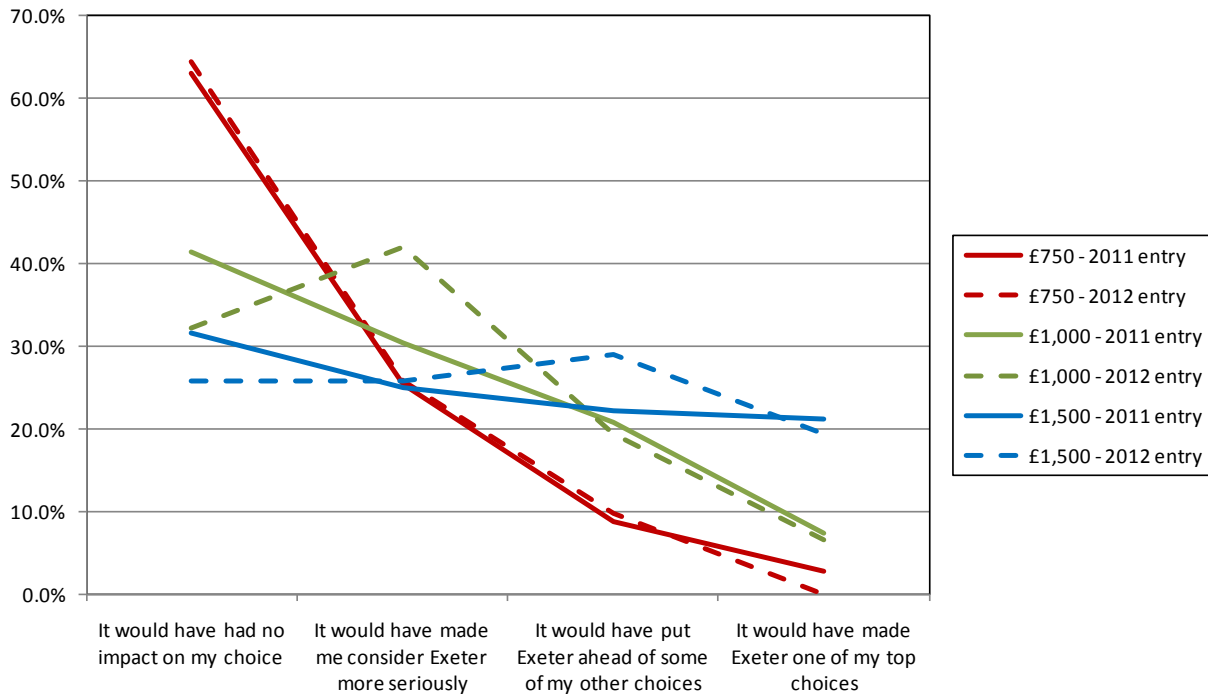
"The area itself definitely impacted my university choices. i felt that London was a much more vibrant location to be situated in despite the cost of living as it is ultimately not just about the course - it's about the student experience. As well as this it is much closer to home." (Cornwall Insurer, Zoology)

6. INFLUENCE OF KEY FACTORS

6.1 Influence of bursaries on decision

Respondents were asked to state the influence that various levels of bursary or scholarship would have had on their decision. Further breakdowns can be found in Appendix 6.1.

Figure 6.1.1 Impact of bursaries on decision – Exeter Decliners



In general, the higher the level of bursary or scholarship, the more impact it would have had on the applicants' decision, with levels of agreement with the stronger statements increasing as the level of bursary or scholarship rose.

The data was split by year of entry to give an early indication of whether funding issues would become more important to applicants in the new fee environment (those who applied this year but deferred their entry to 2012 will be among the first to pay £9k fees). At the £750 level, there was no difference between year of entry yet, at £1000, a greater proportion of deferred entrants agreed that they would have considered Exeter more seriously and at £1,500 a greater proportion of deferred entrants agreed that the funding would have put Exeter ahead of some of their other choices, suggesting that funding will become more of a motivator in the new fee environment.

Perhaps surprisingly, when compared to their counterparts who declined, a greater proportion of our Insurers said that a bursary (at any level) would have had no impact on their choice, suggesting that, for many, this would not be the best way to tip the balance toward conversion.

There were also very low levels of respondents who said that with the bursary they would have put Exeter as their top choice, with the exception being at the £1,500 level, where over 20% of Decliners agreed that this level of funding would have swung their decision in favour of Exeter.

There is little indication that the impact of funding has increased since last year, with the main change being an increase in the proportion of Cornwall decliners who agreed that the funding would have put the University ahead of some of their other choices.

There were few differences between the campuses in terms of the influence of bursaries and scholarships. It was only at the £1,500 level that the funding was shown to have a slightly higher level of influence on Cornwall applicants as opposed to their Exeter counterparts.

6.2 Identifying priorities - Campus / facilities

Following last year's results, three areas were identified as priorities but also as areas where the exact nature of the issue had yet to be identified. These areas were the campus/facilities, nature of the course and employability. Decliners were presented with a list of aspects concerning each area and asked to select the most important to their decision, they were then asked to rate Exeter's performance on each aspect relative to our competitors (using a 5 point scale where 5 equalled 'excellent' and 1 equally 'very poor'). Data, including data by subject and for Cornwall is contained in Appendix 6.2.

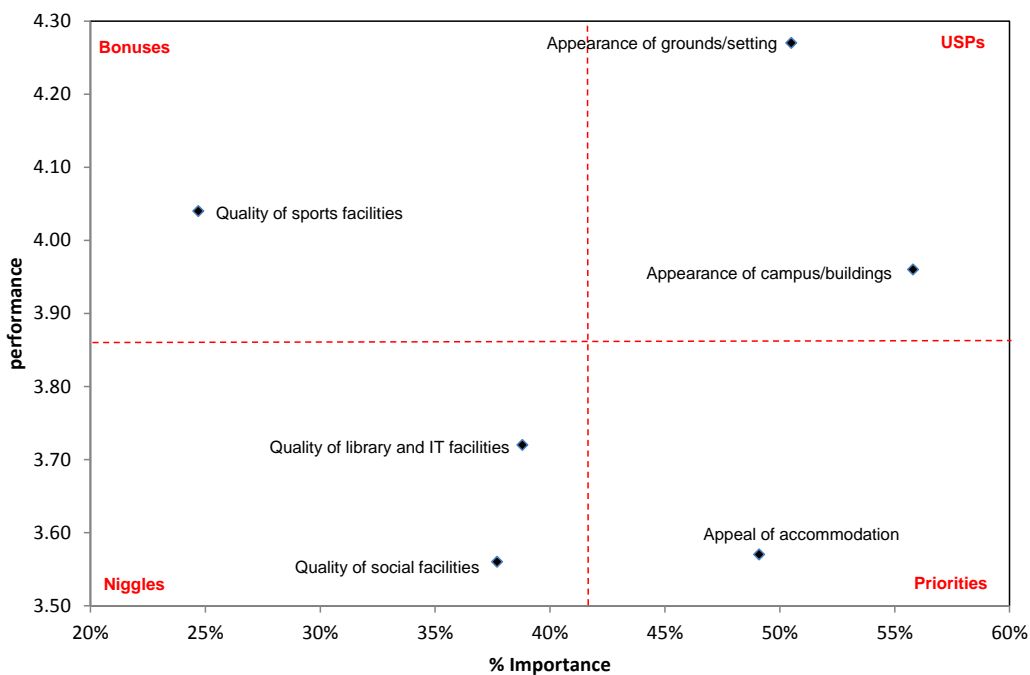
USPs (Unique Selling Points) – Aspects in this area were of relatively high importance to our Decliners' decisions and were where Exeter's performance was also rated highly.

Priorities – These aspects were relatively important to decision making yet were also where our performance received relatively low ratings.

Bonuses – These aspects were of relatively low importance, yet were areas where Exeter performed relatively well in terms of performance ratings.

Niggles – These were aspects of low importance to decision making and were also where our performance was rated poorly in comparison to other factors.

Figure 6.2.1 Campus/facilities – Exeter campuses

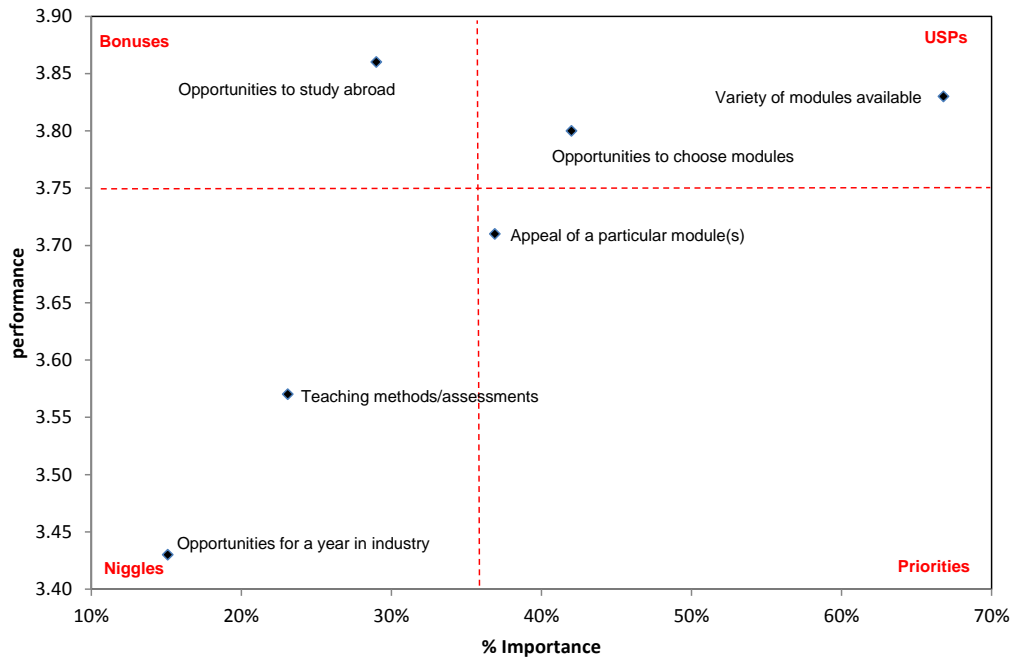


The appearance of our campus, particularly the grounds and setting is one of our key strengths and should continue to be a focus for our comms. While still achieving a mean score which exceeded 'average' on the scale, the appeal of our accommodation is one of our weaker areas, yet unfortunately relatively important to respondents' decisions, making it a priority for improvement. At Cornwall, our accommodation was a USP, while sports facilities fell into the Niggles category and library and IT facilities became a priority for improvement.

"Accommodation offer seemed poor relative to other universities... Building work on on-site accommodation, and offsite accommodation some distance away." (Exeter Decliner, Biosciences)

6.3 Identifying priorities - Aspects of the course

Figure 6.3.1 Aspects of the course – Exeter campuses



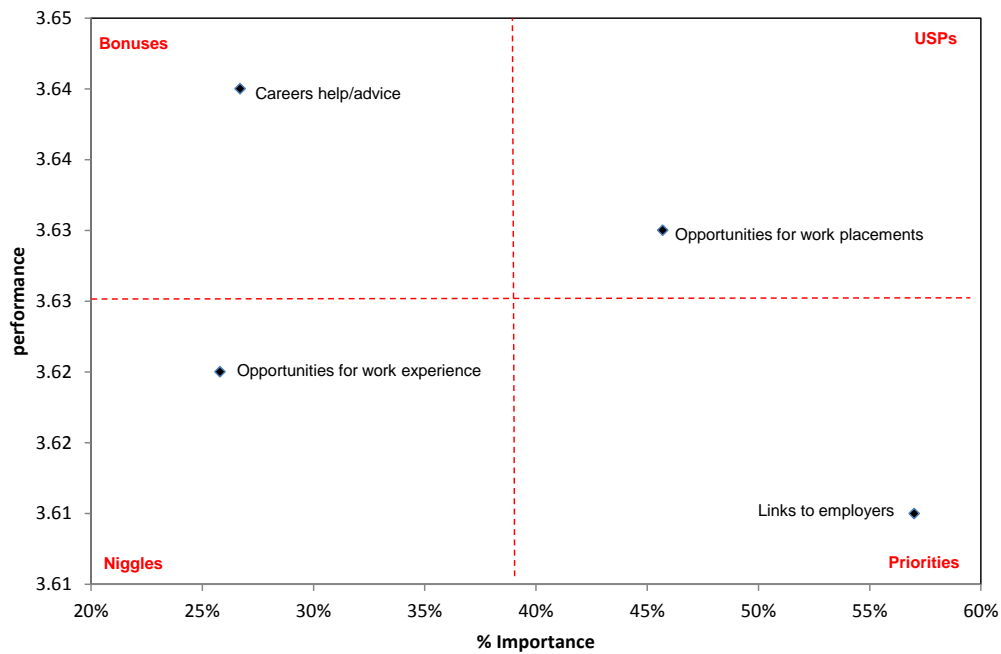
Modules are key to an applicant's decision, with other aspects of the course less important. While the variety of our modules appealed, the slightly worse performance of the 'appeal of a particular module' suggests that there was nothing that stood out of particular interest about our courses, a finding that was also echoed in some of the verbatim comments. While it is impossible for course modules to appeal to everyone, the verbatim comments also suggest that a review of how we present module information may go some way to rectify this situation. The analysis also identified priorities for improvements in certain subjects: Variety of modules available (Archaeology, Geography, History, Philosophy, Politics/International relations, Sociology); Appeal of a particular module (Classics/Ancient History, Geography, Physics); Opportunities to choose modules (Archaeology, Mathematics, Physics); Opportunities for a year in industry (Engineering, Mathematics, Psychology); Teaching Methods/assessments (English, Mathematics, Physics).

"The course did not include modules that interested me as much as other places. I would have like to have gone to Exeter but ultimately the course led to my decision to decline." (Exeter Decliner, Psychology)

At Cornwall the variety of modules available and the opportunity to choose modules were priorities for improvement.

6.4 Identifying priorities - Employability

Figure 6.4.1 Employability – Exeter campuses



The main priority in terms of employability remains links to employers. The analysis also identified priorities for improvement by subject: Opportunities for work placements (Biosciences, Engineering, Mathematics, Psychology, Sport & Health Sciences); Opportunities for work experience (Geography, Law, Psychology); Links to potential employers (Engineering, Geography, History, Law, Mathematics, Physics); Careers help/advice (Modern Languages)

"[York had] better links to employers and excellent focus on potential jobs outside of archaeology." (Exeter Decliner, Archaeology)

6.5 Influence of competitors

Respondents were asked their main reason for accepting their first choice university. Full responses are given in Appendix 2.

Figure 6.5.1 universities accepted



While the **course** was the most frequently mentioned reason to accept all of the universities mentioned above, other reasons were mentioned in each case.

Oxford: The reputation of the University was a key draw as well as the tutorial system. 'Academic' was another word frequently mentioned in association with the university.

Cambridge: Again, reputation was a major factor, along with the university's system of teaching. Cambridge's position in the context of word league-tables and world-wide reputation was also mentioned by many.

Durham: The reputation of Durham and the collegiate system stood out as the main reasons for choosing this university.

Southampton: Southampton's location and distance from respondents' home was a main reason for choosing the university. The campus was also mentioned several times.

Bristol: Reputation was key to Bristol's appeal as well as the city itself. The level of the university's offer was also a main reason for accepting.

Nottingham: While Nottingham had a high proportion of acceptances that were due to reputation, the university's campus and the level of its offer were other key factors.

Warwick: Warwick also benefited from a good reputation, with many respondents also mentioning league table positions as particularly strong at this university. Campus and level of offer were also important.

Bath: While Bath's campus was a draw, work placements, years in industry and employment opportunities were also mentioned frequently.

York: York had less to differentiate it from competitors. While some respondents mentioned its reputation, course modules and academic departments were the only other factors mentioned.

6.6 Visiting the University

65.7% of decliners had visited the University, compared to 75.32% of insurers, illustrating the importance of visits to conversion. Visit rates were higher among Exeter than Cornwall applicants, although the slight increase in visit rates this year was seen among applicants to either campus.

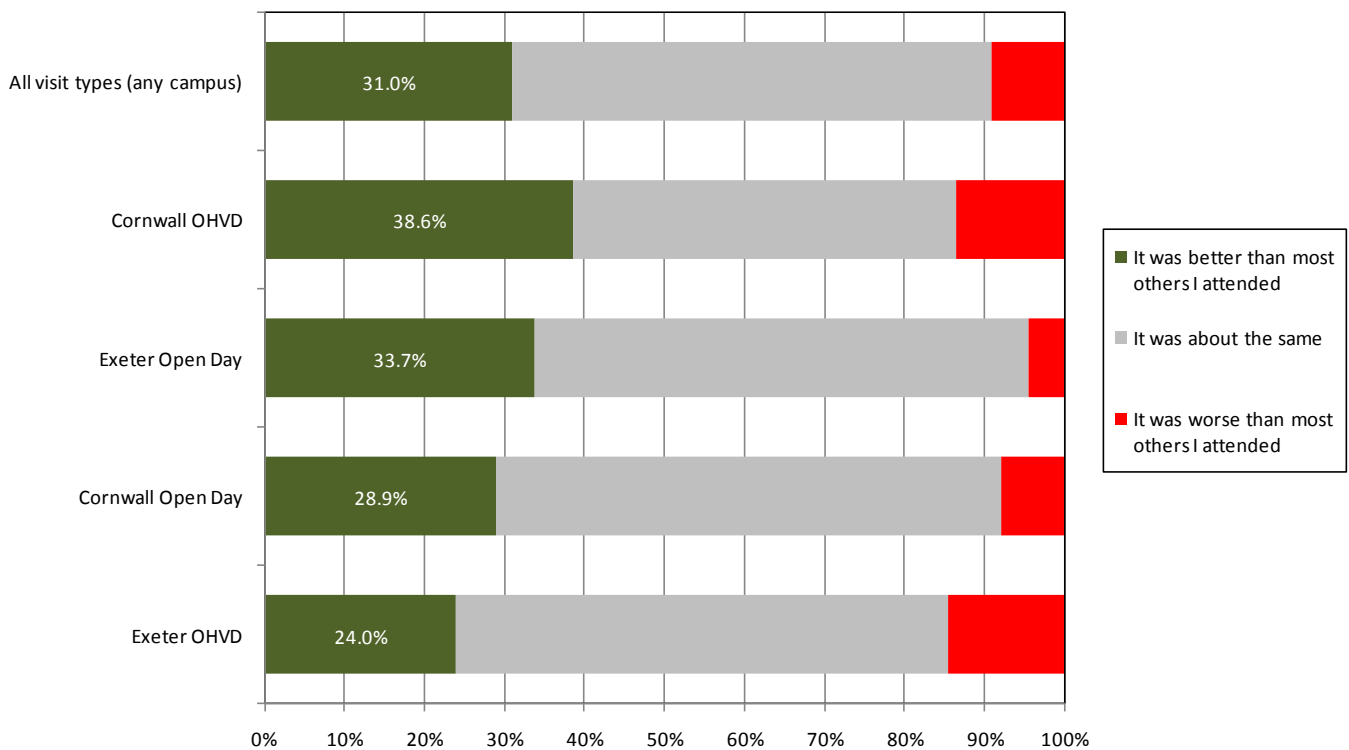
Those who did not visit were asked their reasons for doing so. The most common reason was the distance from respondents' homes, something that was a particular issue for Cornwall. Other issues included the cost of travel, clashes of dates or the fact that many decliners had to prioritise which of their choices they visited, with Exeter losing out to others.

Of those Decliners and Insurers who applied to Exeter, over 98% had only visited the Exeter campuses. Of those that applied to Cornwall, almost a quarter of Decliners had visited the Exeter campuses, although this rate was much lower among the campus' Insurers.

In terms of the type of visit attended, Open Days were the most popular among Exeter's Decliners, with OHVDs more popular at Cornwall. Among Insurers it was OHVDs that were most popular among Insurers to either campus.

Respondents were asked how their visit had compared to those of our competitors they had attended.

Figure 6.6.1 How our visit compared to those of our competitors - Decliners



Just under a third of Decliners felt that their visit was better than most others they had attended, with under 10% feeling that it was worse. Figure 6.6.1 shows the relative performances of visit types, although there were also some differences in rating between type of visitor, with Cornwall's Open Days and the OHVDs at both Exeter and Cornwall rated more highly by Insurers than Decliners, illustrating their importance to conversion.

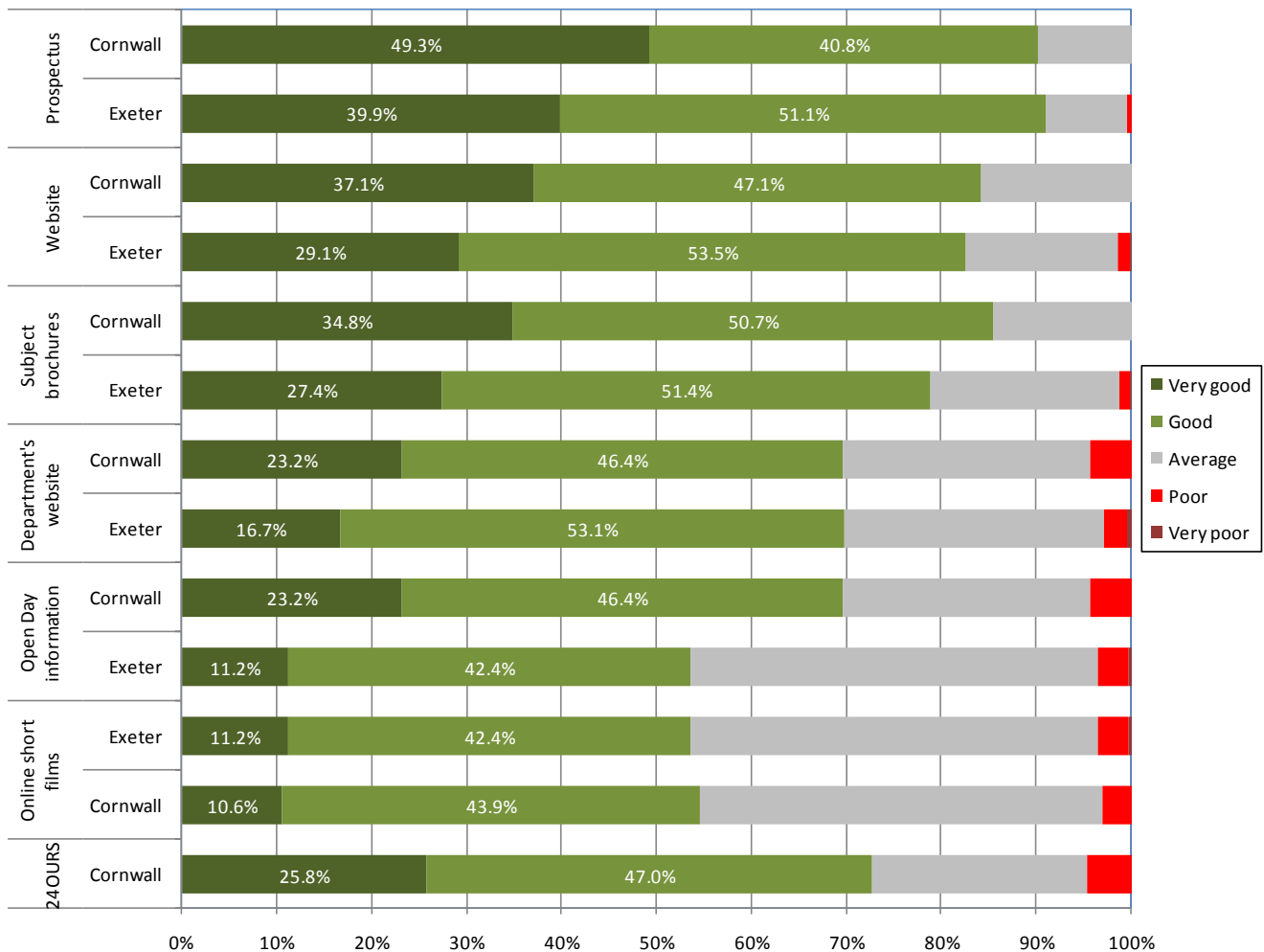
Respondents were then asked how their visit could have been improved. Information was a common complaint, with several students complaining of a lack of relevant information in the talks. It was felt that more student guides were needed with more opportunities to speak to staff and students. Some felt that their visit would have benefitted from a better scheduling of events.

Please see Appendix 6.6 for full breakdowns of visit data and Appendix 2 for full verbatim responses.

6.7 Our information and publicity material

Respondents were asked to rate our information and publicity material.

Figure 6.7.1 Ratings of our information



Our generic information sources outperformed departmental or subject sources, with print outperforming web. The Open Day was among the information sources receiving the lowest ratings and showed the biggest differences between campus, with Cornwall outperforming Exeter.

Insurers gave higher ratings to all our information than those who declined, with Open Day information and 24OURs rating particularly well among this group. Ratings of our Open Day information have worsened slightly since last year.

Accounting & Finance, Engineering and Physics were subjects which received relatively low ratings for both their subject brochures and departmental websites. Combined Honours and Flexible combined Honours also showed weaknesses in these areas.

When asked how our information sources could be improved, it was requested that subject brochures contain more information on module choice and module descriptions. Course information was also mentioned where Open Days were concerned, with talks criticized for focusing on other information instead. It was suggested that web sources contain a greater level of detail and be made more navigable, while inconsistency in grade requirements was a complaint common to all sources.

Please see Appendix 6.7 for full breakdowns of ratings data and Appendix 2 for full verbatim responses.

7. CONTACT AND SERVICE

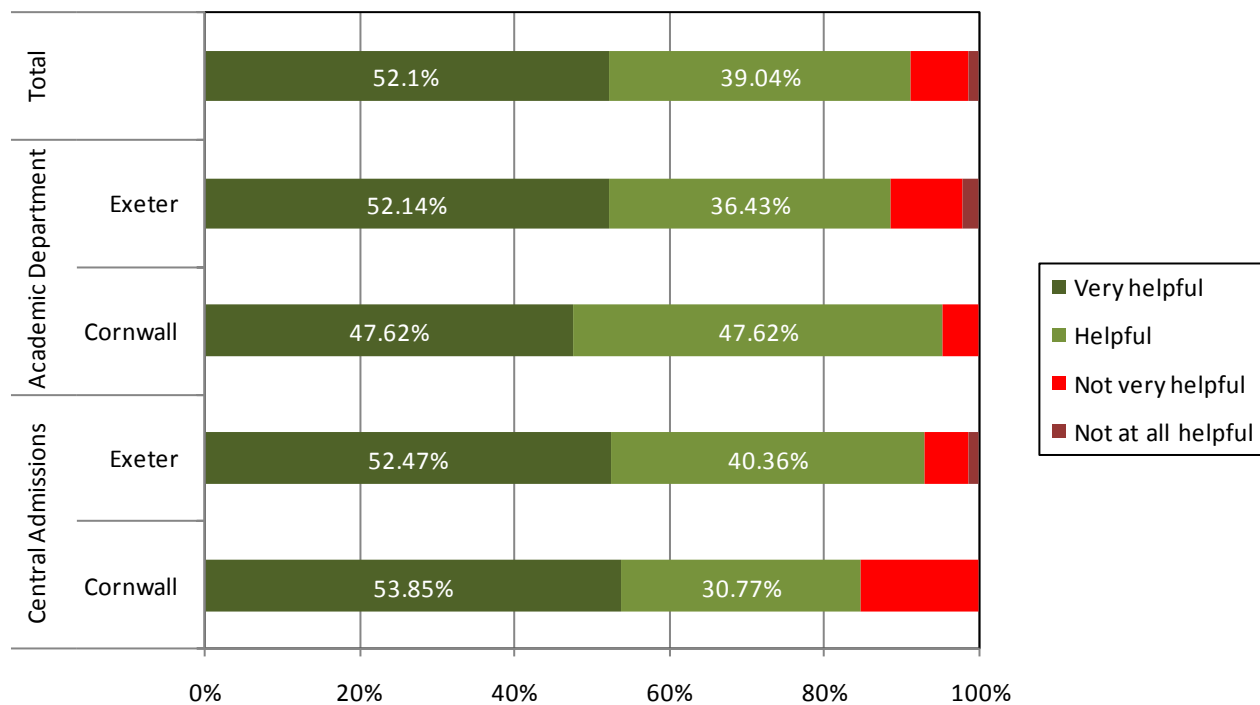
7.1 Contacting the University

Respondents were asked whether they had contacted the University during the application process, almost a quarter of Decliners had, with rates higher among Insurers and Cornwall Campus applicants.

Of those Decliners that had contacted the University, 59.3% had contacted their academic department, with 42.8% contacting Admissions, although the rate among Insurers was closer to 50:50. There were also some differences between campus, with Cornwall Campus applicants, particularly Decliners, more likely to contact Admissions than their academic department.

Respondents were asked how helpful they had found their contact.

Figure 7.1.1 Helpfulness of contact



Over 90% of decliners that had contacted the University found their contact either 'helpful' or 'very helpful'.

There was only a very slight difference between the helpfulness of the academic department and Admissions, due partly to an improvement in ratings for Exeter's Admissions since last year. There was also only a slight difference in ratings between the campuses.

At the Exeter campuses, it was Insurers rather than Decliners who gave their contact the higher ratings, illustrating its importance to conversion.

The Exeter campuses also saw a year-on-year improvement in the ratings of the contacts in both central Admissions and our Academic Departments.

Please refer to Appendix 7.1. for full data breakdowns concerning contacts.

7.2 Speed of offer

Respondents were asked how long they had to wait to receive their offer from us.

The average offer speed was 'Up to 2 months'.

Waiting times were shorter for Cornwall applicants than for their Exeter counterparts, with Insurers experiencing shorter waits than Decliners – something which highlights the importance of a short offer speed to conversion.

On average applicants to gathered field subjects had to wait up to 3 months to receive their offer, one month more than applicants to non-gathered field. It was FCH, Economics and Politics / International Relations (all gathered field subjects this year) which had the longest waits overall.

Since last year there has been a worsening of offer speeds among Decliners, particularly those who applied to Exeter. Offer speeds among Insurers have improved, however, particularly among those insuring at Cornwall.

Impact of Offer Speed

Respondents were then asked how satisfied they were with the speed of their offer and how it compared to that of other universities they had applied to.

Table 7.2.1 Impact of offer speed

Impact of offer speed - summary	Decliners			Insurers		
	Total	Exeter	Cornwall	Total	Exeter	Cornwall
<i>Base**</i>	1750	1539	119	615	514	65
Offer speed - time waited	3.9	4.0	3.3	3.57	3.64	2.48
	Up to 2 months	Up to 2 months	Up to 1 month	Up to 2 months	Up to 2 months	Up to 2 weeks
Offer speed - satisfaction	3.96	3.96	4.32	4.11	4.09	4.49
	Satisfied	Satisfied	Satisfied	Satisfied	Satisfied	Satisfied
Offer Speed - Competitor comparison	3.37	3.38	3.56	3.66	3.62	4.13
	About the same	About the same	Better	Better	Better	Better

On the whole respondents were 'satisfied' with the speed of their offer and thought it 'about the same' as those of our competitors they had applied to.

As a result of quicker offer speeds, Cornwall's applicants (both Decliners and Insurers) were more satisfied than their Exeter counterparts and thought that our offer speeds compared more favourably to those of our competitors.

Insurers benefitted from quicker offer speeds than Decliners and, as a result, were more satisfied with their response time and found their offer speed 'better' than those of competitors they had applied to.

The influence of Decliners' offer speeds on satisfaction and competitor comparison was clear even at the subject level, with FCH, Economics, Politics / International Relations and Philosophy (all gathered field subjects this year) all suffering the longest waiting times and thus the lowest levels of satisfaction and the least favourable scores in terms of competitor comparison.

In general, applicants to gathered field subjects were less satisfied than applicants to non-gathered field subjects and were more likely to rate their offer speed as the same rather than better than those of our competitors.

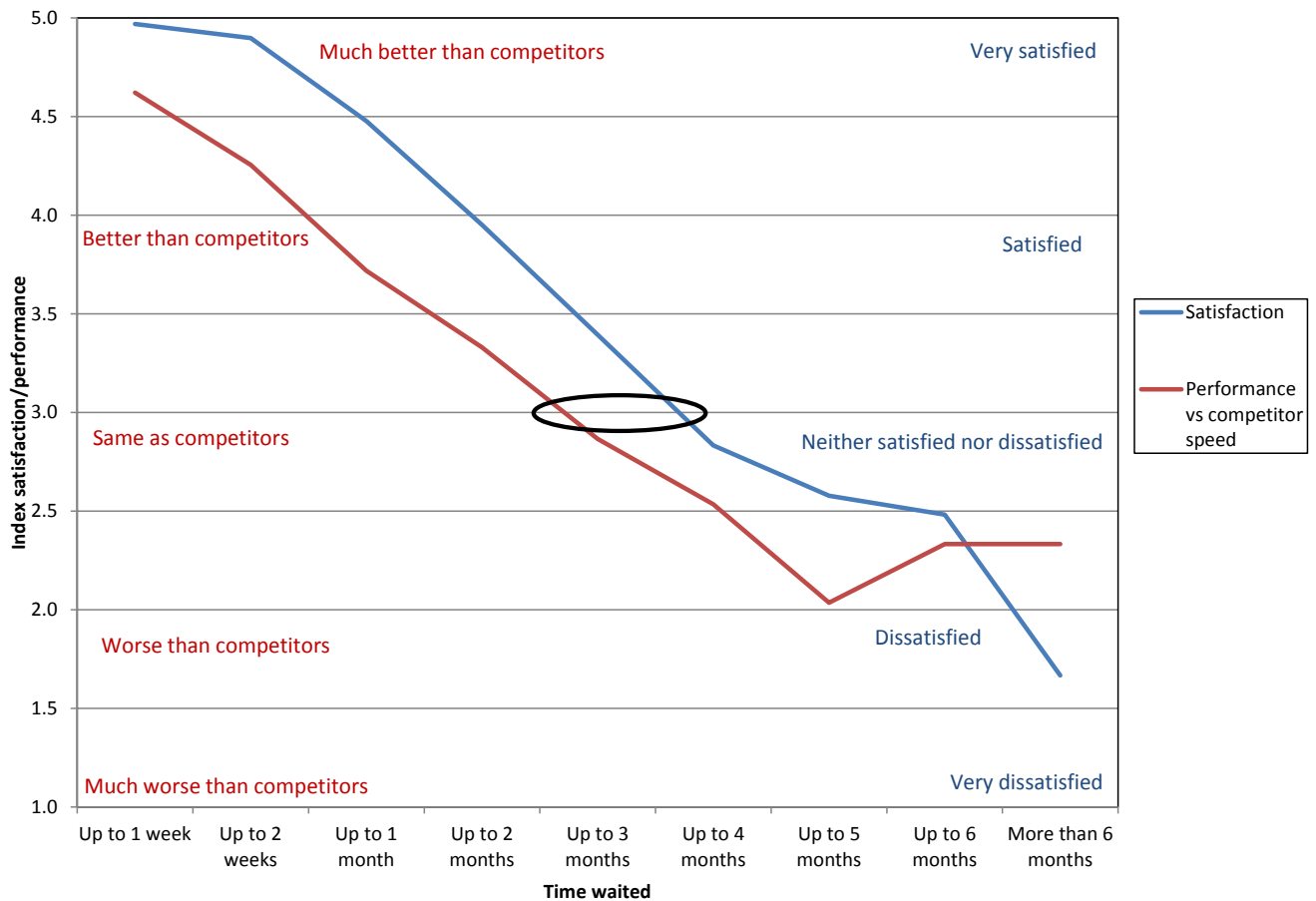
Please refer to Appendix 7.2 for full data concerning offer speeds and their impact.

** Base shown is indicative only and would have varied slightly with each question.

Relationship between Offer Speed, Satisfaction and Competitor Comparison

See [Appendix 7.2](#) for full results.

Figure 7.2.2 Satisfaction and competitor comparison vs speed – Exeter Decliners



The longer a respondent has to wait for their offer, the less satisfied they became. In general, respondents became dissatisfied after they had waited **4 months**, so every effort should be made to make offers within this time.

There was a strong link between satisfaction and the offer speed of our competitors, suggesting that respondents gauged our offer speed relative to that of other offers they received. In order to keep up with our competitors, offers would have to be made **within 3 months**.

7.3 Expectation management

Managing Expectations

Respondents were asked how the time they had waited for their offer from the University of Exeter compared to how long they had expected to wait. The results are summarised below – please see [Appendix 7.3](#) for a full breakdown.

Table 7.3.1 Impact of expectation management

Impact of offer speed - summary	Decliners			Insurers		
	Total	Exeter	Cornwall	Total	Exeter	Cornwall
<i>Base**</i>	1750	1539	119	615	514	65
Offer speed - time waited	3.9	4.0	3.3	3.57	3.64	2.48
	Up to 2 months	Up to 2 months	Up to 1 month	Up to 2 months	Up to 2 months	Up to 2 weeks
Offer speed vs expectation	3.84	3.83	3.87	3.50	3.46	4.02
	It was quicker	It was quicker	It was quicker	Same as expected	Same as expected	It was quicker
% agreeing they were informed of wait	45.69%	45.30%	49.58%	47.63%	48.25%	42.86%
% agreeing they were kept informed of progress	67.4%	67.2%	76.3%	72.9%	73.7%	71.4%

On average, the speed of our offer was quicker than expected among Decliners, yet the same as expected among Insurers who had shorter waiting times overall.

While there was little difference between the campuses among Decliners, among Insurers, Cornwall applicants found their offer speed to be quicker than expected, while Exeter applicants found it to be the same as they had expected.

There link between offer speed and Decliners' expectations was evident at the subject level, with subjects with the slower offer speeds, such as FCH, Economics, Philosophy, Politics / International Relations and History, all also more likely to state that the speed of their offer was in line with, rather than quicker than their expectations.

In general, applicants to gathered field subjects thought that their speed of offer was 'as expected', among non-gathered field subjects however, expectations were more likely to be exceeded, with respondents on average finding our offer speed 'quicker' than expected.

Following the measures that were introduced to manage expectations this year, respondents were then asked a) whether the University had made it clear from the outset how long they may have to wait and b) whether the University had done enough to keep them informed of the progress of their application while they were waiting. Results are summarised below, with their impact shown on the graph overleaf.

Just under half of respondents agreed that they had been informed of potential waiting times, with around 70% agreeing that they had been kept informed of their application's progress.

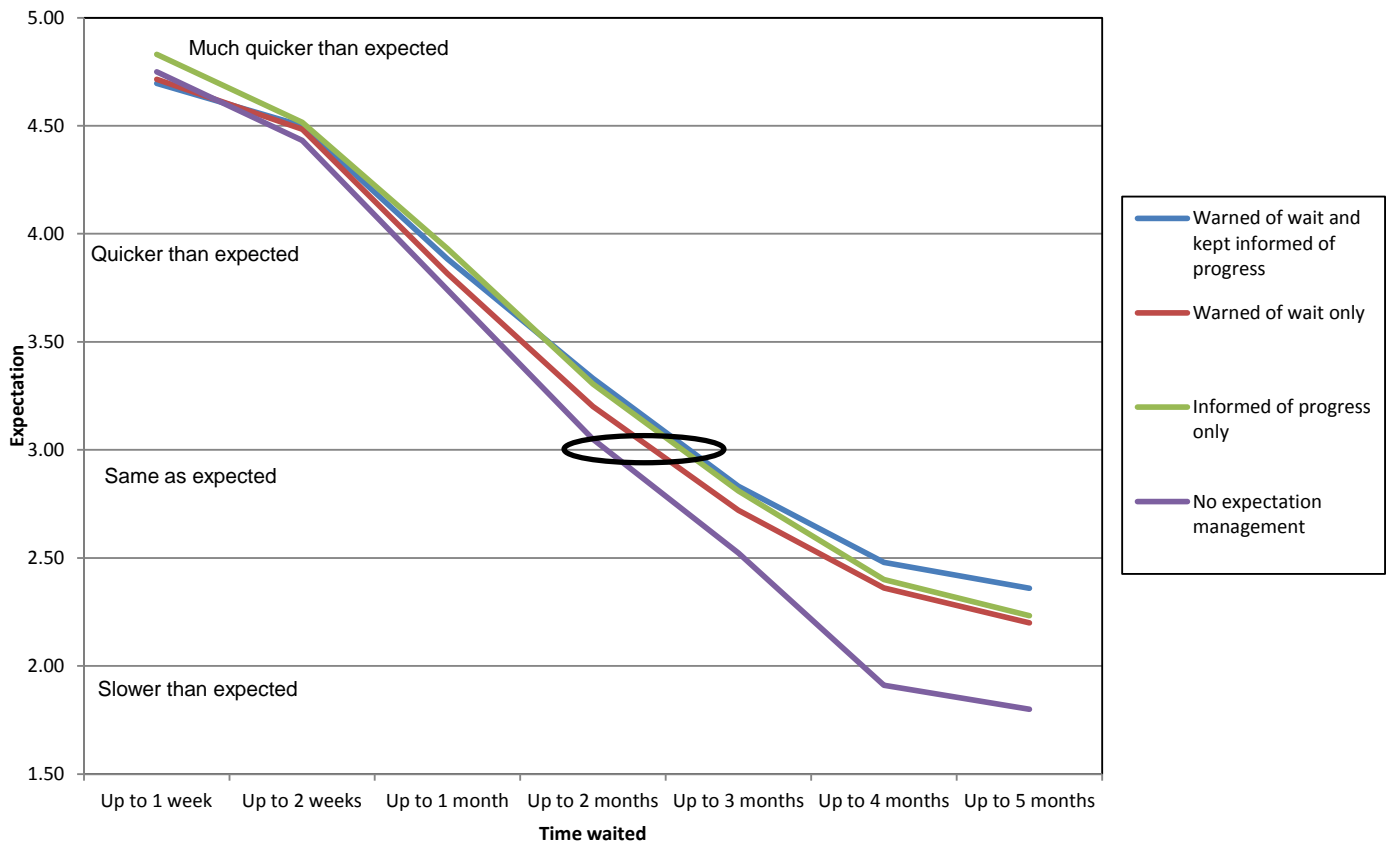
Among Decliners it was Cornwall's respondents who felt they had been better informed, both of potential waits and of their application's progress, with the reverse being true among Insurers, where Exeter applicants felt the better informed.

Insurers felt better informed than Decliners, with the exception of Cornwall applicants where higher percentages of Decliners agreed with the statements about expectation management.

Those who had applied to gathered field subjects were more likely to state that the University had informed them of potential waiting times, with over 50% agreeing with the statement (as opposed to 40% among non-gathered field applicants). When respondents were asked whether the University had done enough to keep them informed of their application's progress however, there was little difference between the groups.

** Base shown is indicative only and would have varied slightly with each question.

Figure 7.3.2 Impact of expectation management on expectations



There was a strong link between waiting time and expectation, with the respondents waiting over 2 months on average claiming that their waiting times were longer than they had expected.

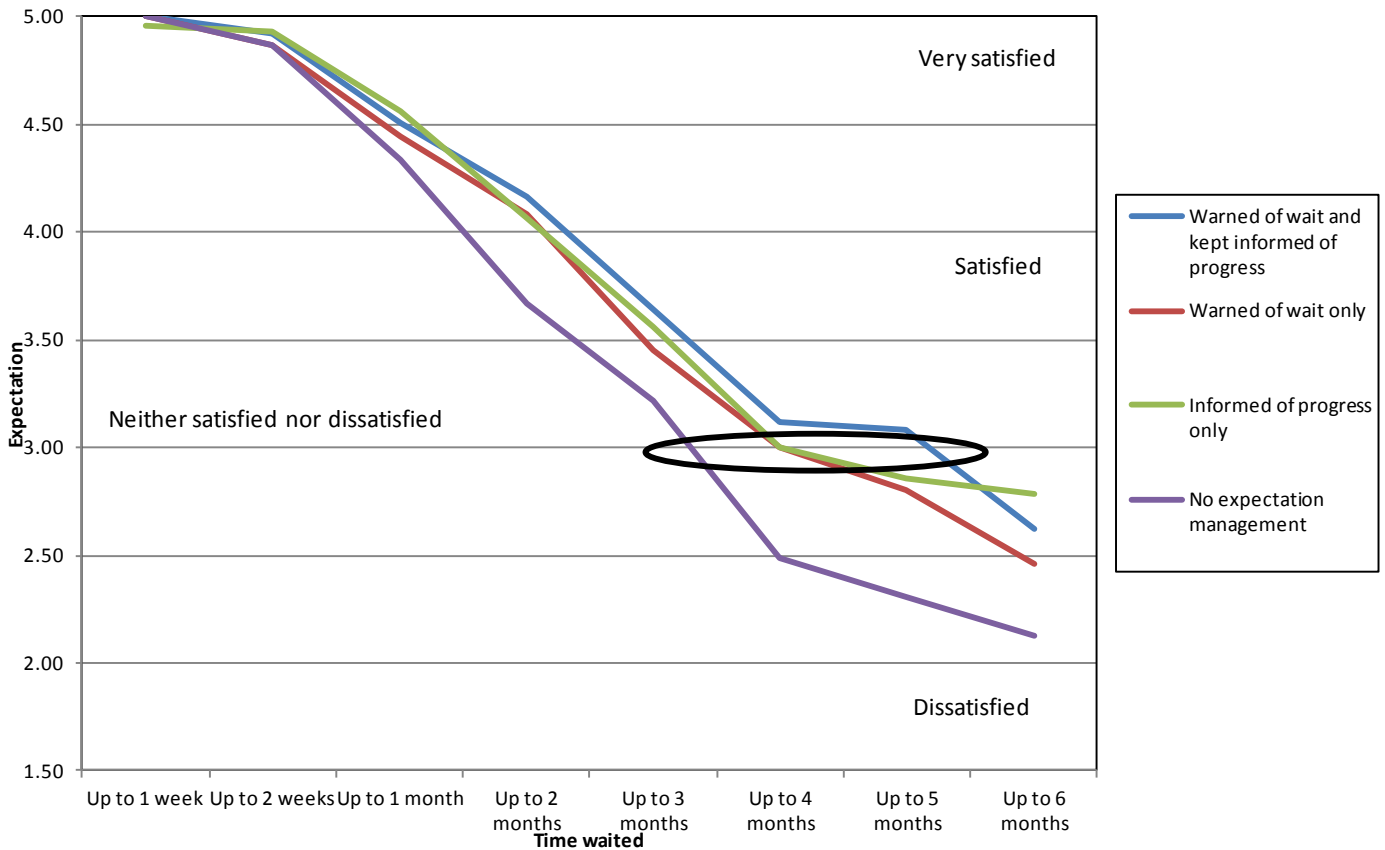
For waits of over 2 months, it was those who had been both informed of waiting times and kept informed of their application’s progress were the group who were most likely to feel that the University’s offer speed had been quicker than, or in line with, their expectations.

The data suggests that by implementing expectation management, expectations can be stretched an extra month (for waiting times of over 2 months).

Unlike last year, there was little difference in the effectiveness of the two forms of expectation management, suggesting that estimated waiting times had been more accurate this year.

Please refer to Appendix 7.3 for a full breakdown of data or Appendix 2 for verbatim responses.

Figure 7.3.3 Impact of expectation management on satisfaction



There is a clear link between offer speed and satisfaction, with applicants generally becoming dissatisfied after waiting for more than 3 months.

Those who had been both informed of any wait and kept informed of their application’s progress were the group who were the most satisfied overall.

Unlike last year, there was little difference in the effectiveness of warning applicants of potential waits and keeping them informed of their application’s progress, suggesting an improvement in the accuracy of predicted waiting times since last year.

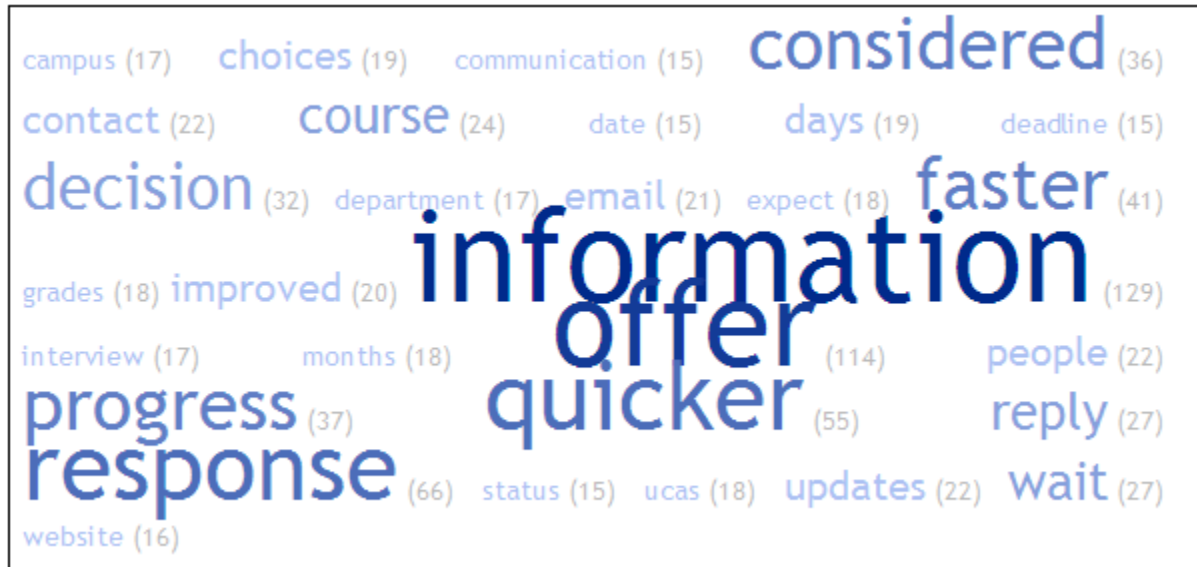
The data suggests that, for waits of over 2 months, effective expectation management can ‘buy’ an extra month of satisfaction.

Please refer to Appendix 7.3 for a full breakdown of data or Appendix 2 for verbatim responses.

7.4 Improvements to our admissions process

Respondents were asked how our admissions process could be improved. It should be noted that a substantial proportion of responses were positive, an extremely good result considering that the question was designed to elicit improvements. A summary of the negative responses is given below.

Figure 7.4.1 Improvements to our admissions process



Information / Progress: Respondents requested a range of information, although the most common requests concerned more information on the progress of individual applications.

“A tracking system such as is used via the Durham University website helps students feel more on top of their application. It lets them know when their application has been received, when it is under review by their department etc.” (Exeter Decliner, Classics and French)

“Simply more communication.... Emails were a relief to know that my application was in the mix. I’m sure, having talked endlessly with my peers about applications that are seemingly lost in the post, that more communication if only to say “we apologise for the delay but we are still considering your application” would be appreciated” (Exeter Decliner, Law)

Quicker / Faster Response: Respondents requested faster offer speeds, with some stating that they had started to consider universities more seriously once they had received an offer from them.

“Be much faster at making a decision on a candidate, the faster you hear of an offer the more time you have to consider it and look around the University if accepted” (Exeter Decliner, Theology)

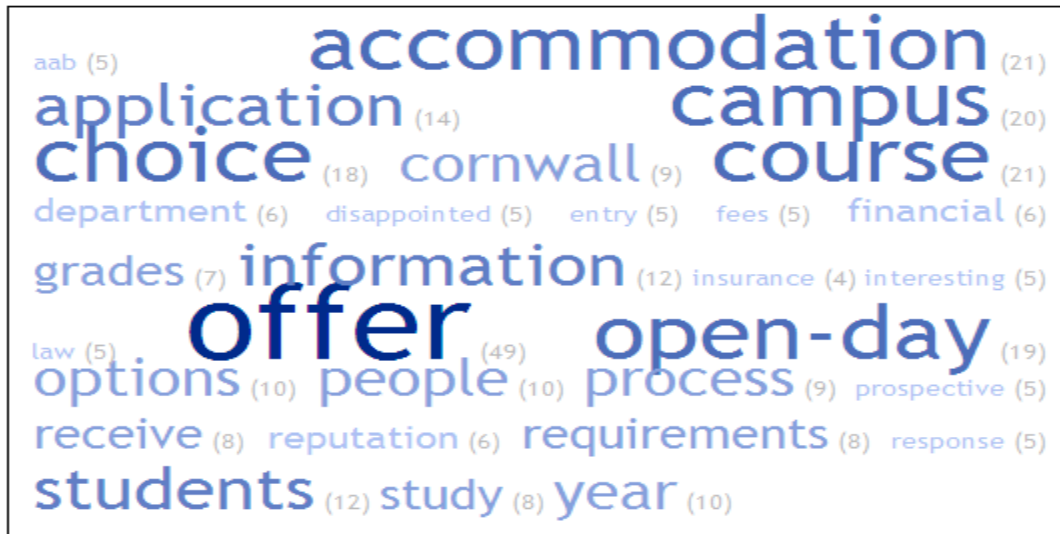
“Just speed up. I probably would have made more effort to visit Exeter university and include it in my decision had I received a quicker response. When a university takes ages to reply to your offer it gives you the impression that they’re not really sure about you. The others responded so quickly and I was much more convinced they really wanted me on their course” (Exeter, Decliner, FCH)

Please refer to Appendix 2 for all responses to this question.

8. OTHER COMMENTS

Respondents were asked for further comments. Negative comments are summarised below, with all responses in Appendix 2.

Figure 8.1.1 Further comments – negative



Offer: Respondents again mentioned that the level of our offer was too high, with a significant number saying that it was too high to make their insurance choice.

"I would rather have been rejected than offered grade requirements which are above my predicted grades because it made my decision a lot harder" (Exeter Decliner, Modern Languages)

Accommodation: Some felt that our accommodation had let down an otherwise promising choice, with the standard and price both criticised.

"Accommodation offer seemed poor relative to other universities-some good places but low chance of getting in and allocation system a lottery. (My uni of choice offered me guaranteed high quality accommodation near to my lectures for all 3 years" (Exeter Decliner, Biosciences)

Course: Some respondents mentioned that the course that they applied for at Exeter did not appeal to them as much as those of our competitors.

"The greater emphasis on Geology modules at Southampton led me to place this as my firm choice, but across all categories there was little between the Universities" (Exeter Insurer, Geography)

Campus: Several respondents felt that our campuses did not suit what they wanted from their university experience.

"The only reason I declined my offer was because [the campus] seemed too separated from any city life, which is what I wanted in my university experience" (Decliner, Exeter, Drama)

Open Day: Respondents mentioned disappointing visit experiences, such as organisational problems on Open Days and uninspiring subject talks.

"On the open-day we were given the wrong information at the event which caused us to miss the talks in my subject. This impacted my decision because I was not aware of the course details or other information" (Exeter Insurer, Politics / International Relations)