NATIONAL CLEARING SURVEY 2022

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TO USE **DATA, TECHNOLOGY** AND **CREATIVITY** TO TRANSFORM THE WAY STUDENTS CONNECT WITH EDUCATION OPPORTUNITIES

OUR MISSION

NET NATIVES | National Clearing Survey 2022

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Contents

About the National Clearing Survey

The National Clearing Survey is a major research initiative, analysing the Clearing journey from the point of view of the student. It is representative, independent and is the only survey of its kind.

This is the eighth edition of the report since launching in 2015.

The results are benchmarked against findings from the previous seven years of research to identify short and long-term trends. This includes comparison to pre-covid findings, looking at how things change as the world moves out of a pandemic.

We also combine this data with insights from our Student Pulse and Trends research to delve deeper into the findings and build a bigger picture. Further information on these resources are available at the end of this report.

Methodology

The National Clearing Survey 2022 was open to all students who applied to university through Clearing for the 2022/23 academic year.

Every HEI in the UK is invited to collaborate on the survey by the Research Division at Net Natives. We provide a bespoke institution-branded landing page which directs respondents to the survey, and the link to the landing page is sent out by institutions to their Clearing applicants.

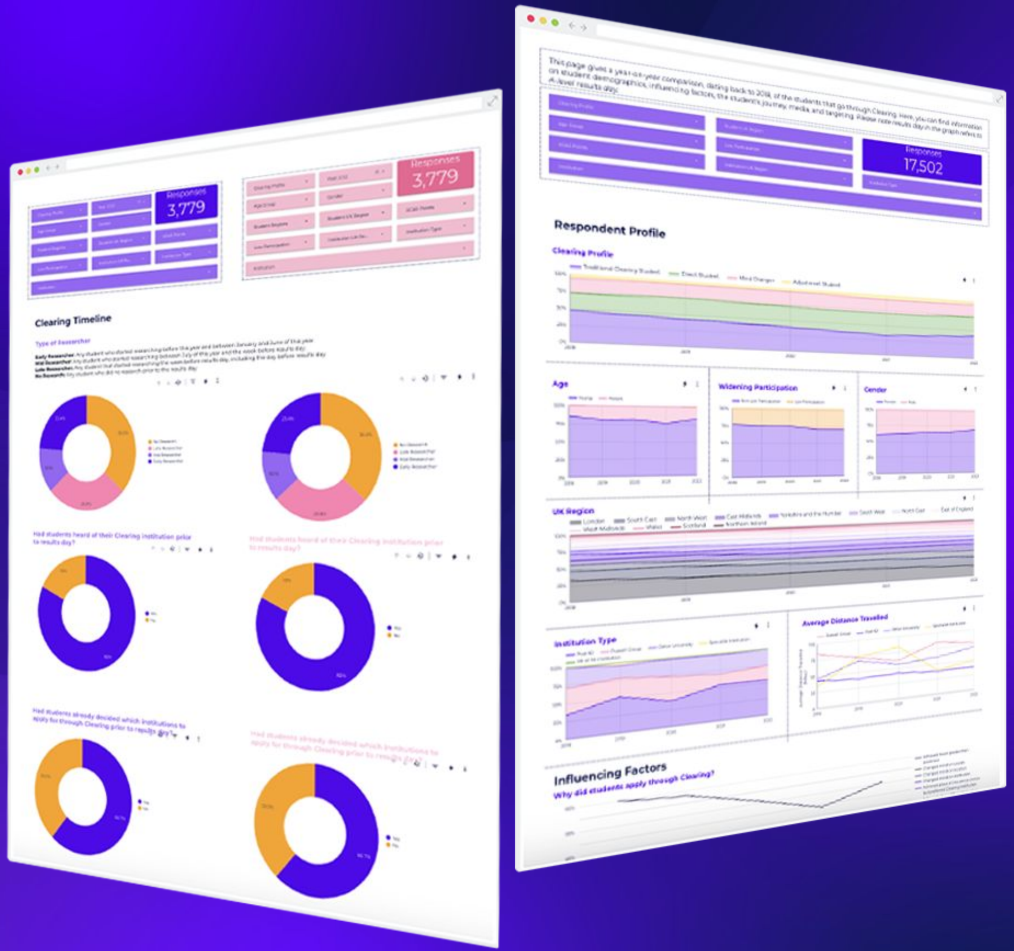
The survey opened on 18 August, the day of A Level exam results, and closed 31 October. Institutions decide when in that timeframe to circulate the survey based on their own communication plans or priorities. The data is then analysed and visualised by our Data and Research teams.

This report will take you through the key findings from the 2022 National Clearing Survey.

For the full data set, where you can interrogate, filter, compare and aggregate the data, head to our NCS dashboard.

[Click here]

Simply log into Akero* and click the 'Insights' tab. You'll find the 'NCS' dashboard here, along with a user guide.



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Introduction

There was a lot of expectation for 2022: would we see a return to pre-covid Clearing? What long-term changes might covid have kick-started? Would 2021's high teacher-assessed grades mean top universities were less able to compromise on entry requirements, resulting in more students in Clearing?

+19%
18 YEAR OLDS

12,510
STUDENTS PLACED DIRECT TO CLEARING

20,360
STUDENTS RELEASED INTO CLEARING

The reality partially matched this: while fewer students made their first or insurance choice compared to 2021, 19% more 18 year olds in the UK gained a place to their firm or insurance choice compared to 2019 (UCAS), with UCAS dubbing it a record-breaking year for exam-sitting students.

- ➔ 20,360 students were released into Clearing on A level results day (UCAS), 16% lower than 2019, but substantially more than 2021
- ➔ 12,510 students were placed direct to Clearing, representing an increase on 2021 but lower than 2019 or 2020 (UCAS).
- ➔ Adjustment was replaced by the "decline my place" button for students to choose to use Clearing to reassess their university choice.

Despite what looked to be a buoyant Clearing, some universities saw dwindling acceptances, with one higher education consultancy, DataHE, dubbing it a "high volume, low intensity" Clearing.

Viewing Clearing from the student perspective, the National Clearing Survey seeks to add depth of understanding to this pattern, and more.

NCS 2022 in Numbers

3,779
RESPONSES

STUDENTS GOING TO
107 INSTITUTIONS

P4RTNERS
44

1 IN 5
RUSSELL
GROUP

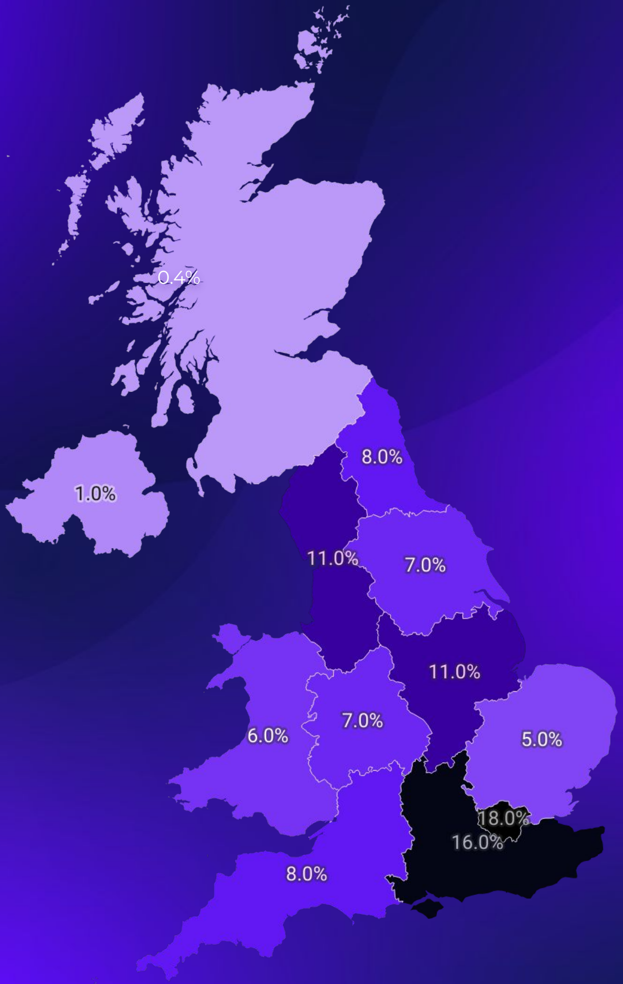
2 IN 5 POST-92
INSTITUTIONS

933,413
DATA POINTS

NCS 2022 - top line demographics

GENDER PROFILE	
69%	31%
FEMALE	MALE

AVERAGE AGE	20
FIRST GEN	47%
LOW PARTICIPATION AREA (POLAR4 Quintile 1 or 2)	30%



How representative is NCS 2022?

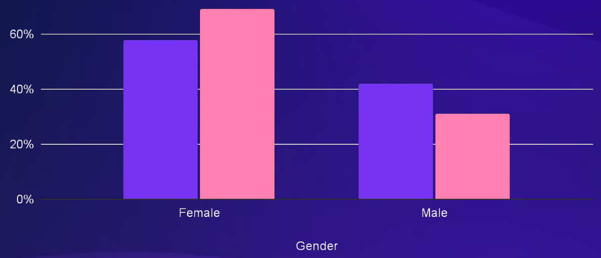
The distribution of NCS data compared to UCAS data for Clearing 2022 shows that the survey data is representative.

There is a slight bias towards female respondents (in-line with previous years), and slight over-representation of the North East, and under-representation of Scotland and Northern Ireland.

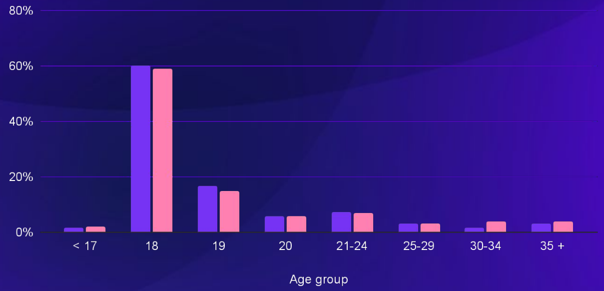
Key

UCAS NCS

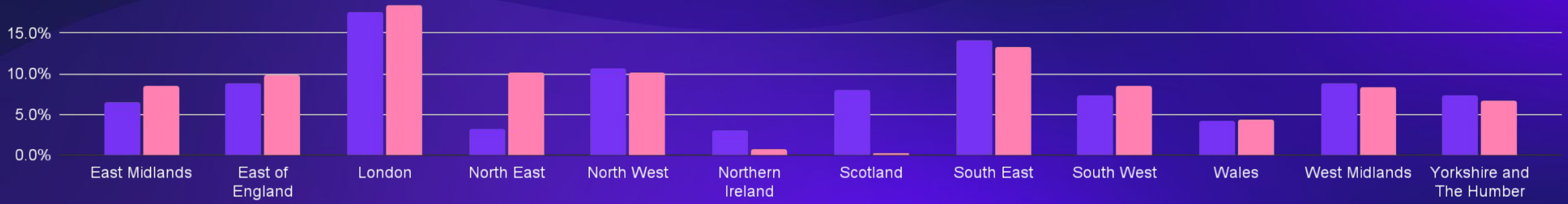
Gender



Age Group



Region



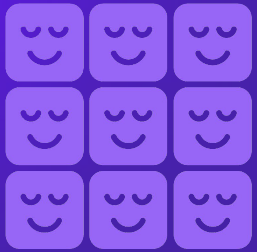
Executive Summary

NCS 2022 shows us both how the world has moved on from the covid pandemic, and how some things remain consistent.

We continue to see 4 key Clearing student segments, based on motivations for being in Clearing: the Traditional Clearing student, whose grades are lower than predicted, the Adjustment Students, whose grades are higher than anticipated, the Direct Student, who is applying for university for the first time through Clearing, and the Mind Changer, who is using Clearing for reasons totally unrelated to their grades.

We also see from this year's data that cost of living continues to be the biggest barrier to entering higher education. However, perhaps contrary to assumptions, the proportion of respondents citing this as a barrier has decreased this year. Conversely, there is a sharp increase in the proportion of respondents saying there are no barriers to higher education for them.

The key findings from this year's report are:



STUDENTS NOW HAVE MORE PEOPLE HAVING MORE OF AN INFLUENCE THAN EVER BEFORE.

UNIVERSITIES NEED TO BE ON STUDENTS' RADARS BEFORE A-LEVEL RESULTS DAY TO RECRUIT IN CLEARING.

CLEARING STUDENTS FROM LONDON ARE TRAVELLING FURTHER FOR UNIVERSITY.

EVEN IN A COMPETITIVE CLEARING, UNIVERSITY SELECTION IS A BUYERS' MARKET.

Clearing Segments

THE TRADITIONAL STUDENT

The Traditional Clearing Student represents the largest group in Clearing. Typically, they will enter the Clearing process having not secured one of their original UCAS choices, or will have got lower than expected grades.

THE DIRECT APPLICANT

Older than the other groups, and the hardest to track and measure, the Direct Applicant will often have received their results in previous years and will be applying for a place for the first time through Clearing.

THE MIND CHANGER

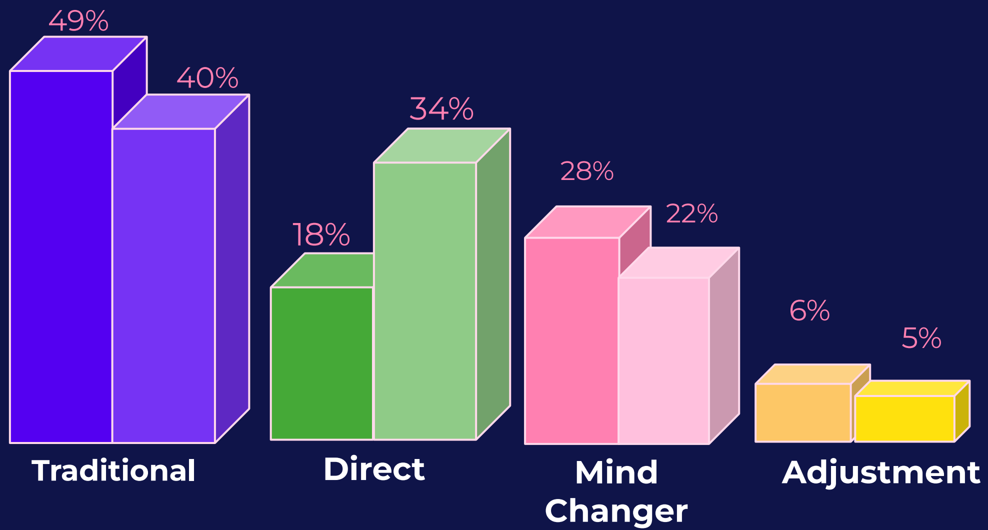
The Mind Changers are going through Clearing for reasons other than their grades, linked to personal or contextual factors, which have influenced them to change their mind on their institution, course or location.

THE ADJUSTMENT APPLICANT

The Adjustment Student has entered Clearing because they received better grades than expected, and they're looking for an institution with higher grade boundaries.

SEGMENT MARKET SHARE

2016 → 2022



We use the full range of responses in the National Clearing Survey to add depth and richness to our segments, and provide insight into what this means for Clearing marketing - and beyond.

Since 2016, the Direct Applicant has grown as a proportion of respondents, highlighting the changing attitudes toward Clearing; no longer a stigma, we see students taking control of their own university journey and feeling empowered to use Clearing as a means to enter higher education.

We can see similarities across segments: all four segments are now more likely to study subjects allied to medicine, mental health has dropped out of the top 3 barriers for all segments, and TikTok has become a top 3 platform for all segments except the Direct Applicant, replacing YouTube.

There are some key differences between segments too: 'Career prospects' have dropped out of the top 3 motivators for Traditional Students and Direct Applicants. Meanwhile, Adjustment Students no longer see 'course content' in their top 3.

When it comes to influencers: friends are no longer a top 3 influencer for Traditional Students, and teachers have dropped out of the top 3 for Adjustment Students, in both instances being **replaced by university staff as a key influencer.**

Traditional Clearing student

SIZE	AVERAGE AGE	AVERAGE UCAS POINTS	FIRST-GEN
40%	18.8	116	43%

GENDER SPLIT:		TYPE OF INSTITUTION (TOP 2)
Female: 69%	Male: 31%	Post 92 Russell Group /Other University

MOST LIKELY TO STUDY (TOP 3)			
Subjects Allied to Medicine	Social Sciences	Business and Management	Over index on: Psychology

MOTIVATORS	Course availability	Course information /modules	Entry requirements
INFLUENCERS	Parents/Guardian	University staff	Teacher/School /College
BARRIERS	High cost of living	Meeting entry requirements	There aren't any barriers

TYPE OF RESEARCHER (I.E. LATE, MID, EARLY)

Late: **32%**	**None:** **32%**

SOURCES USED (TOP 3 WITH %)

UCAS	**Google Search**	**Institution website**

TOP SOCIAL MEDIA (TOP 3 WITH %) MULTIPLE TIMES A DAY/DAILY

Instagram	**Snapchat**	**TikTok**

EMOTIONS

Received results: **Disappointed**	Looking for a place: **Stressed**	Received place: **Relieved**

The Direct Applicant

SIZE	AVERAGE AGE	AVERAGE UCAS POINTS	FIRST-GEN
34%	22.3	117	51%

GENDER SPLIT:		TYPE OF INSTITUTION (TOP 2)
Female: 68%	Male: 32%	Post 92 Other University

MOST LIKELY TO STUDY (TOP 3)			
Subjects Allied to Medicine	Business and Management	Social Sciences	Over index on: Business and Management

MOTIVATORS	Course availability	Course information /modules	Access to face-to-face teaching
INFLUENCERS	Parents/Guardian	Friends	University staff
BARRIERS	High cost of living	There aren't any barriers	High cost of tuition

TYPE OF RESEARCHER (I.E. LATE, MID, EARLY)

Late:	None:
21%	**47%**

SOURCES USED (TOP 3 WITH %)

UCAS	Google Search	Institution website

TOP SOCIAL MEDIA (TOP 3 WITH %) MULTIPLE TIMES A DAY/DAILY

Instagram	Snapchat	YouTube

EMOTIONS

Received results:	Looking for a place:	Received place:
Happy	**Nervous**	**Relieved**

The Mind Changer

SIZE	AVERAGE AGE	AVERAGE UCAS POINTS	FIRST-GEN
22%	19.7	126	47%

GENDER SPLIT:		TYPE OF INSTITUTION (TOP 2)
Female: 72%	Male: 28%	Post 92 Other University

MOST LIKELY TO STUDY (TOP 3)		
Subjects Allied to Medicine	Business and Management	Social Sciences

MOTIVATORS	Course information /modules	Career prospects/ graduation rates	Course availability
INFLUENCERS	Parents/Guardian	Friends	Current university students/alumni
BARRIERS	High cost of living	There aren't any barriers	High cost of tuition

TYPE OF RESEARCHER (I.E. LATE, MID, EARLY)

Early:	None:
32%	29%

SOURCES USED (TOP 3 WITH %)

UCAS	Institution website	Google Search

TOP SOCIAL MEDIA (TOP 3 WITH %) MULTIPLE TIMES A DAY/DAILY

Instagram	Snapchat	TikTok

EMOTIONS

Received results:	Looking for a place:	Received place:
Happy	**Stressed**	**Relieved**

The Adjustment Applicant

SIZE	AVERAGE AGE	AVERAGE UCAS POINTS	FIRST-GEN
5%	18.7	132	50%

GENDER SPLIT:		TYPE OF INSTITUTION (TOP 2)
Female: 61%	Male: 39%	Post 92 Russell Group

MOST LIKELY TO STUDY (TOP 3)			
Business and Management	Subjects Allied to Medicine	Law	Over index on: **Business and Management**

MOTIVATORS		
Career prospects/ graduation rates	Access to face-to-face teaching	Course availability

INFLUENCERS		
Parents/Guardian	University staff	Friends

BARRIERS		
High cost of living	High cost of tuition	There aren’t any barriers

TYPE OF RESEARCHER (I.E. LATE, MID, EARLY)

Late:	None:
33%	**27%**

SOURCES USED (TOP 3 WITH %)

UCAS	**Google Search**	**Social Media**

TOP SOCIAL MEDIA (TOP 3 WITH %) MULTIPLE TIMES A DAY/DAILY

Snapchat	**Instagram**	**TikTok**

EMOTIONS

Received results:	Looking for a place:	Received place:
Happy	**Nervous**	**Nervous**

The Clearing Timeline

When did you start researching?

	Before this year	Jan-March this year (UCAS deadline)	April this This year (Exam Period)	May this This year (Exam Period)	June this This year (Exam Period)	July this This year (IB results)	1st-16th August	Day before results day (A Level, BTEC and SQAA results)
Overall	8%	7%	4%	6%	12%	21%	31%	11%
The Traditional Student	6%	6%	4%	6%	10%	21%	34%	13%
The Direct Applicant	11%	7%	2%	4%	13%	22%	30%	10%
The Mind Changer	8%	7%	5%	9%	17%	19%	28%	8%
The Adjustment Applicant	7%	9%	5%	7%	8%	19%	32%	14%

When did you start looking for a Clearing place?

	Clearing						
	Before results day	Results day Before 10	Results day 10:00 - 11:59	Results day 12:00 - 13:59	Results day - After 2pm	Within a week after results day	Longer than a week after results day
Overall	39%	21%	13%	5%	4%	7%	10%
The Traditional Student	31%	31%	19%	7%	4%	4%	3%
The Direct Applicant	44%	12%	8%	4%	4%	9%	18%
The Mind Changer	50%	15%	9%	4%	3%	7%	10%
The Adjustment Applicant	34%	24%	16%	8%	5%	9%	5%

Key Findings

KEY FINDING 1

It's not just parents you need to convince.

Students now have more people, having more influence, than before.

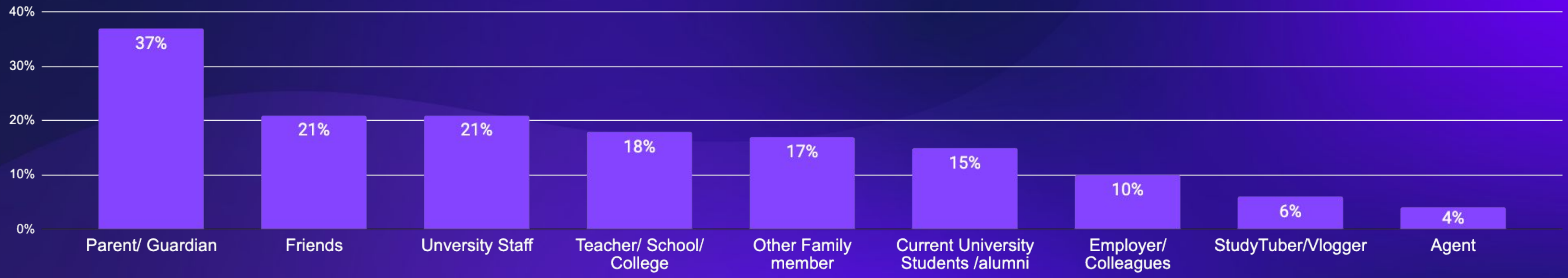
Parents remain the top influencers for students

Parents were the top influencer cited by students, with 37% saying they have a lot of influence, and a further 36% saying they have a little influence, meaning more than 7 out of 10 respondents are influenced by their parents.

Parents have been the top influencers for students since we first introduced this question in the 2018 NCS, and anyone who works directly with prospective students will likely see this in action at open days, or other events, and via digital communication channels.

Friends and university staff continue to be the second and third most influential groups, with 20% students citing them as having a lot of influence and a further 36% citing friends as having a little influence, and 32% saying university staff. This means that these two groups - friends and university staff - are influencing over half of Clearing students.

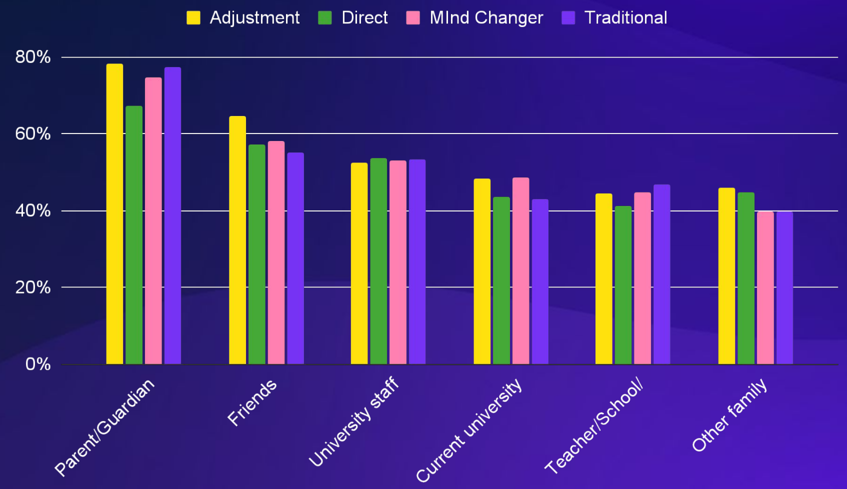
Q: How influential are the following people when making decisions about Clearing places?



Based on students responding 'A lot' to the amount of influence

Parents remain the top influencers for students...

Q: How influential are the following people when making decisions about Clearing places?



However, this influence does vary by Clearing segment. Direct Applicants are the oldest segment, tending to include mature students, and the most likely to be first generation at university. Only around 2 out of 3 (67%) Direct Applicants say parents have some influence, while for the other three segments over 3 in 4 (75%) say this. Conversely, Direct Students over-index on other family members, which may include, for example, spouse/partner, or children.

Adjustment Students are more likely to be influenced by friends than the other segments, with 2 out of 3 (65%) saying they have some influence on their university decision.

The level of influence from university staff, conversely, is very consistent across all segments, showing how important it is for university staff to engage with all prospects, for example at open days, or via Clearing-specific channels like a hotline.

Based on students responding 'A lot' or "A little' to the amount of influence

…however over the years all groups have seen an increase in their influence, apart from parents

Q: How influential are the following people when making decisions about Clearing places?

Other Family Member	Teacher/School/College
4.5%	3%
Friends	**University staff**
1.5%	1.3%
StudyTuber/Vlogger	**Employer/Colleagues**
2.4%	2.3%
Agent	**Parent/Guardian**
0.9%	-3.5%

Based on students responding 'A lot' to the amount of influence, change from 2019-2022

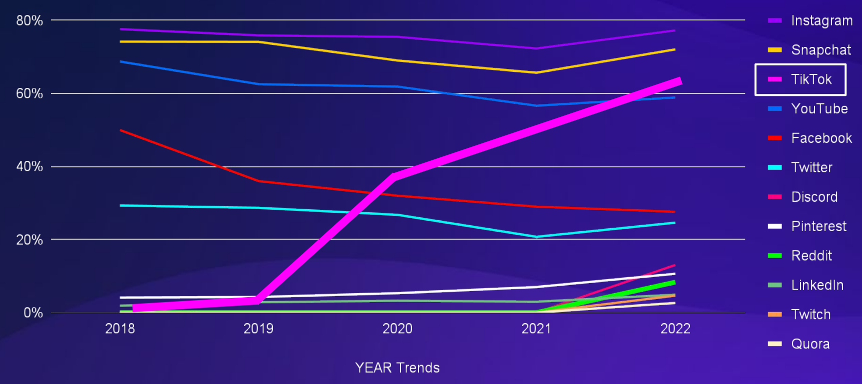
Focusing on change over time, all groups have seen an increase since 2019, apart from parents.

This has implications for marketing activity, suggesting the need for a broad approach when raising awareness and building connection across multiple audiences. This insight also highlights the importance of consistent and coherent brand communication at all touchpoints.

While most of these groups will be people that are known to prospective students to a greater or lesser extent, the increase in the influence of studytubers and bloggers has been similar to other groups. This presents opportunities for engaging online influencers in an authentic and meaningful way to create impact, and also reinforces the broad range of influences involved in a prospective students' decision-making.

Meanwhile, TikTok continues its meteoric rise

Q: What platforms do students use daily?



Focusing on social influencers, we see that the social media channels used most often on a daily basis are also those where influencers are heavily active, and where an influencer strategy could be implemented.

TikTok has seen another year on year increase in daily use to become the third most used platform behind Instagram and Snapchat, pushing YouTube into the fourth spot for the first time in 2022.

TikTok is known for its specific style of native content, with ad formats that allow advertisers to mimic this within the platform.

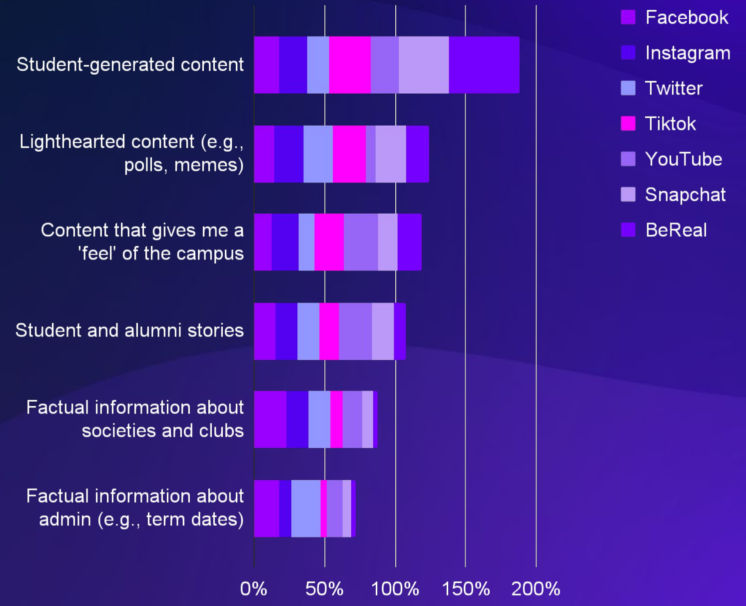
Usage varies by Clearing segment, with TikTok out of the top 3 for Direct Applicants, replaced by YouTube. However, TikTok has seen an increase in daily use across all Clearing segments.

Meanwhile Facebook has seen a decline as a daily use platform across all Clearing segments since 2019.

However, Direct Students remain notably higher users of Facebook with around 1 in 3 using it daily compared to only 1 in 4 or 1 in 5 for the other segments.

Students use social media to get a feel for a university

Q: Where would you go if you wanted to find this information from universities? Source: Net Natives Trending Topic January 2023



Insight from Net Natives' Trending Topics survey in January 2023 shows that students are using social media to access student-generated content. This aligns with the insight from NCS and indicates that there may be an opportunity to engage with some student influencers as part of a recruitment marketing campaign to help build positive connections with prospective students.

BeReal, Snapchat and TikTok came out as the channels most likely to be used for accessing this type of content.

The other areas where students are most likely to use social media in their university research are:

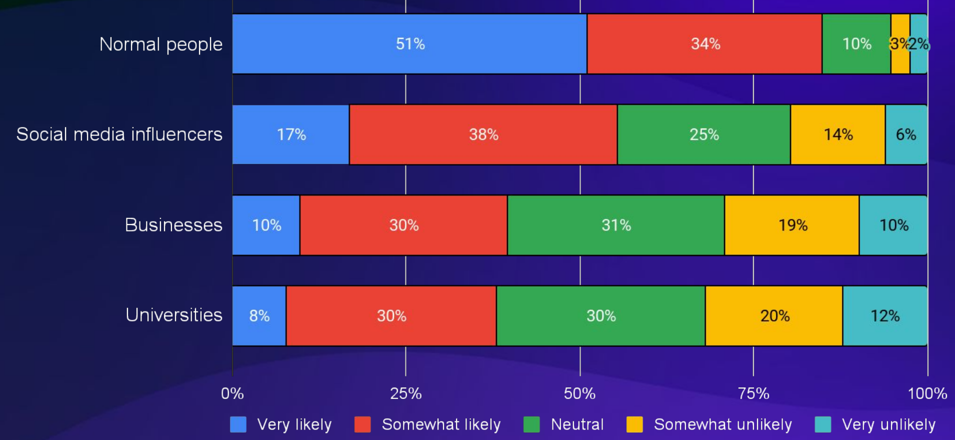
- ➔ Lighthearted content, e.g. polls or memes
- ➔ Content that gives a feel for the campus
- ➔ Student and alumni stories

Students are least likely to use social media to find out factual information about either processes or social aspects of the university.

This insight gives clear guidance on the type of content which students are most likely to engage with via social media channels, and can support the development of a social media content strategy.

Spotlight on TikTok

How likely are you to interact with TikTok content created by…



Data source: Net Natives Trending Topics Survey Report, August 2022

Insight from Net Natives' Trending Topics survey shows that students are open to universities being on TikTok: 75% of TikTok users agree with this.

TikTok users are most likely to interact with "normal people" or influencers, meaning that the platform needs to be approached carefully.

Students are very clear that anything overly scripted, polished or "too much like an ad" is cringey and embarrassing. And while the preference is for funny content, informative content is also welcomed. Brands need to avoid mindlessly jumping on trends, especially if it's not relevant, or doesn't scream authenticity.

TikTok users are more likely than not to use the app with the sound on, meaning that any content should communicate your messages via both audio and visual media (Net Natives' Trending Topics September 2022).

Here's what respondents had to say about influencers in our open question:

Q: Based on your experience of the Clearing process if there was one thing that you think future students should know that would help them, what would it be?

University Staff	Current University Students/alumni	Teacher/School/College	YouTube/Bloggers
"Talk to the tutors" **Traditional Clearing Student** *"Have a member of staff from the university and course they applied to, to ring them and talk to about the course and university in general"* **Direct Student**	*"Honest opinions from current students"* **Adjustment Student**	*"Speak to your teachers for help"* **Traditional Clearing Student** *"Talk to your teachers once you have got your results about which universities you should consider or even taking a gap year"* **Adjustment Student**	*"Research the universities you like the look of...I personally did this through advice from YouTube bloggers, the universities websites and online rankings and articles about the universities"* **Direct Student**

It's not just the parents you need to convince. Students now have more people, having more influence, than before.

Recommendations

1. **Include multiple audience groups in your advertising**

   Some audiences can be specifically targeted but at a certain level, the awareness piece can be quite broad, with follow up messaging to build connections more specific to your audiences. For influencers, the key is to communicate what you're about at brand level.

2. **Consider all brand touchpoints and ensure consistency and coherence**

   This will include any wider goings on, e.g. local developments, parking at open days, issues with students in the local community, business partnerships etc. Anything where the university brand is apparent.

It's not just the parents you need to convince. Students now have more people, having more influence, than before.

After each set of recommendations in this report we've included a set of questions for you, as university marketers, to consider. These are designed to help you develop the findings of the research into tangible action plans for your university.

Questions for you

- How are you engaging with different audience groups?
- How are you ensuring consistent brand messaging across different activity streams?
- How are you measuring the impact of ambassador platforms?
- What is your social influencer strategy?
- Whose voices are you using in your marketing?

KEY FINDING 2

Universities need to be on students' radars before A-level Results Day to recruit in Clearing

University brand awareness remains increasingly important

Q: Had students heard of their Clearing institution prior to results day?

% who had heard of Clearing uni prior to Results Day

83%
2019

2019
83%
2020

2020
76%
2021

2021
83%
2022

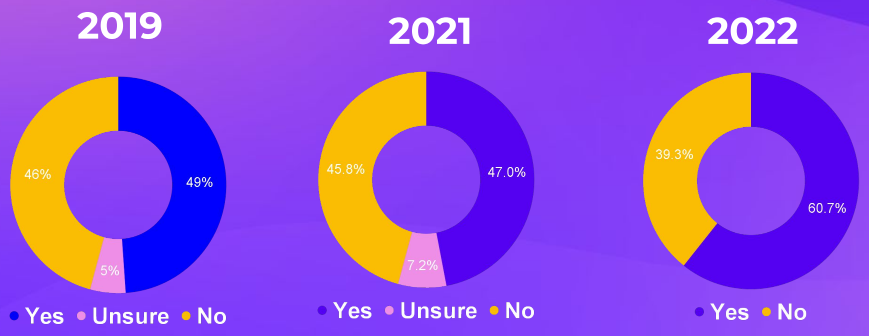
In the 2021 NCS we saw a dip in brand awareness of the eventual Clearing university. However, 2022 has seen a return to the patterns from previous surveys, with more than 4 in 5 (83%) respondents saying they had heard of their Clearing university in advance of A level results day.

There is a need to focus on brand, awareness, reputation and perception throughout the year.

Ultimately, if you do not have broad awareness, the pool of Clearing students who will consider you will be substantially smaller.

Why is this even more important? Because more students are deciding early on where to go

Q: Had students already decided which institutions to apply for through Clearing prior to results day? Note - 'unsure' was removed in 2022



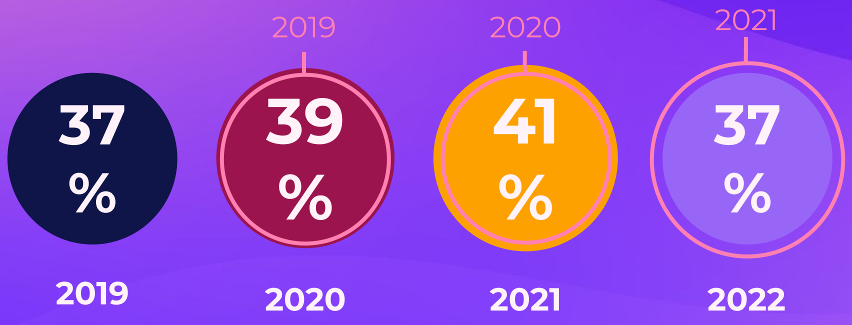
We saw a year on year increase of 14% of students saying they had already decided which institutions to apply for through Clearing prior to A level results day. In 2022 almost ⅔ (61%) of respondents said they had made this decision in advance.

We also saw an increase in the proportion of students who went to one of their original choices through Clearing, up from 26% in 2019 to 31% in 2022.

In many cases, the job of Clearing recruitment is done in advance of A level results day. This has implications for how marketing budget is phased through the year, and how student recruitment campaigns can be structured for greatest impact.

Research patterns returned to pre-pandemic levels

Q: Did you do any research prior to Results Day?
Graphs show % that did none



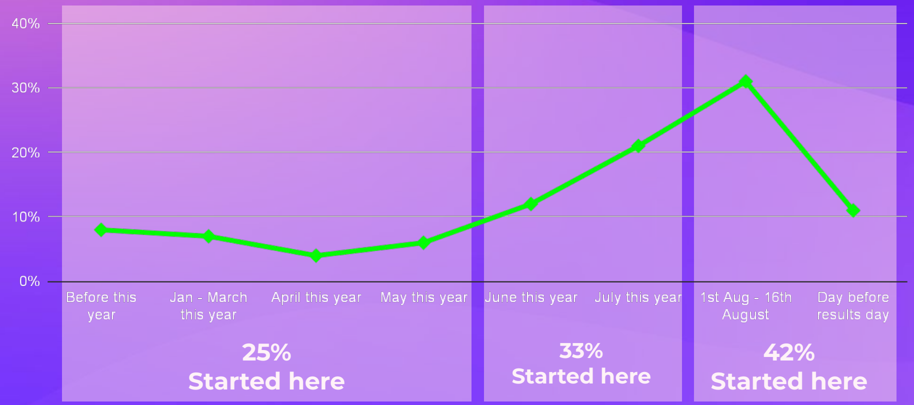
% who did **No Research**

We saw a reduction in the proportion of students (37%) who undertook no research, in line with the 2019 findings.

The majority of students (63%) are prepared as they approach Clearing, which highlights the need to be available to prospective students at any time.

⅔ students begin their research prior to A level results day

Q: When did students start researching about Clearing?



The timing of prospective students' research is varied across the year.

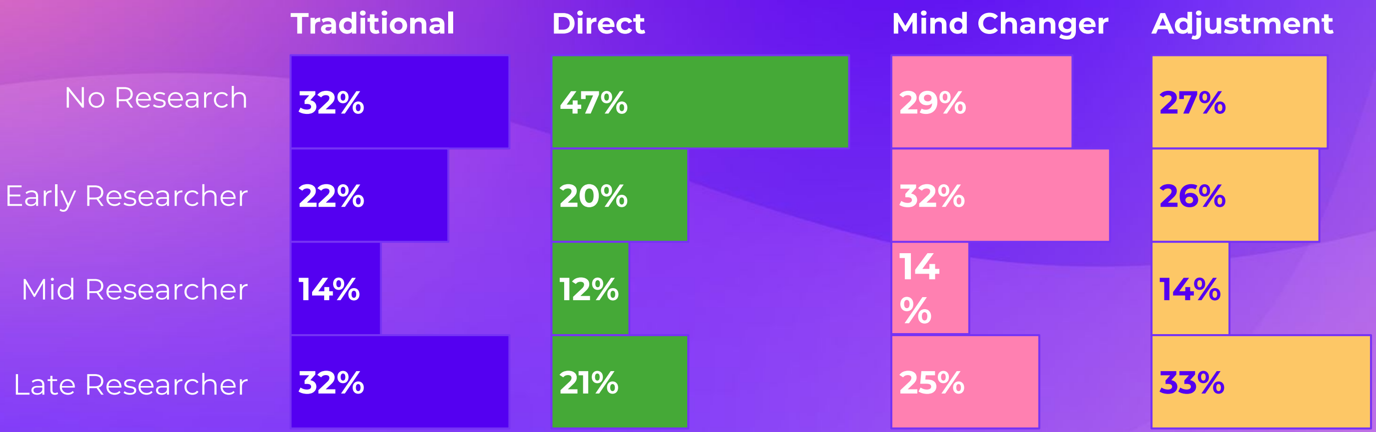
Around 1 in 4 students started their research in or before May, while an additional 1 in 3 started in June and July. The remaining 42% waited until August to start researching Clearing options.

Almost 2 in 3 (60%) of students are undertaking some form of research in advance of A level results day.

This high proportion, coupled with the long duration of research means that you need to allocate budget for both brand awareness and engagement, and Clearing promotion, well in advance of A level results day.

However research patterns vary per segment

Q: Did you do any research prior to Results Day? If so when did you start?

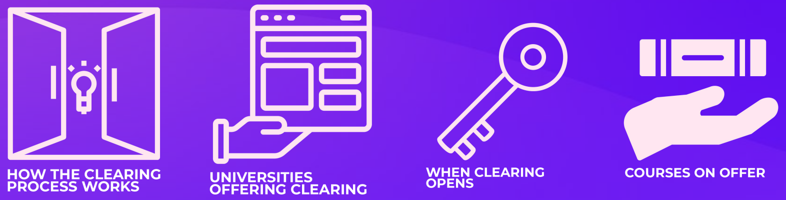


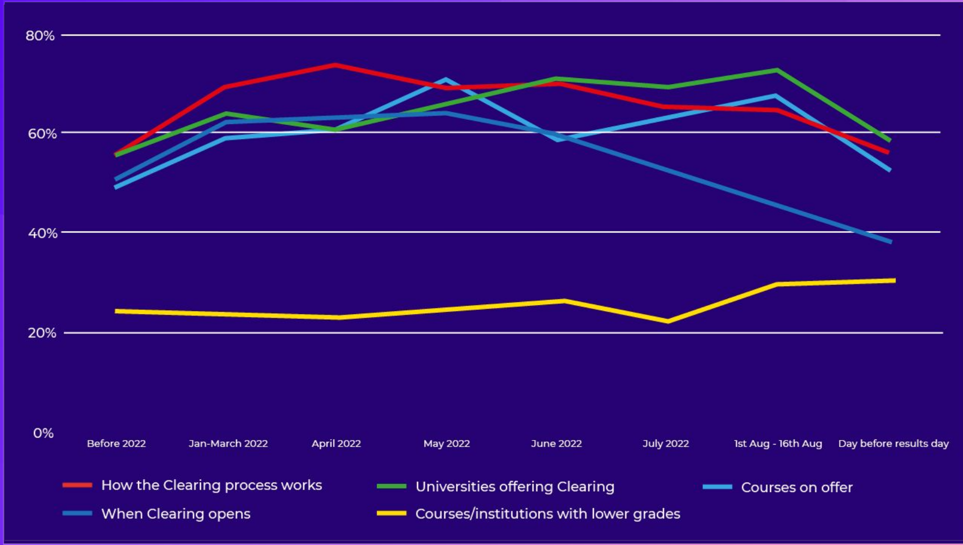
Research patterns differ by Clearing segments. Traditional and Adjustment Students are later researchers, as they are the two groups for whom Clearing may be more of a surprise as it relates to their grades. The Mind Changer is likely to be an earlier researcher, indicating that they are already having second thoughts about their original choice of university. Direct Students are the most likely to undertake no research, which aligns with their timeline and securing their place later than other segments: 30% of this group secured their place more than 1 week after results day, versus 19% overall.

Early: before 2022 up until June
Mid: between July and week before results day
Late: week before, including day before results day

While the content of searches changes over the pre-Clearing period

The top 4 Clearing-related searches are relatively broad:





However, the hierarchy of content that Clearing students are searching for changes over time. In the earlier phases from January to April 'How the Clearing process works is the most dominant search. This then switches to 'Universities offering Clearing' from around Junetime, while 'When Clearing opens' declines from May onwards.

Meanwhile searches for courses/institutions with lower grades increase from the start of August.

Win attention, then build connection… but students are *less likely* to share their data

34.8%
REGISTERED THEIR DETAILS ON THEIR CLEARING UNI WEBSITE

COMPARED TO 52% IN 2019

ONLY 17.3%
DOWLOADED OR REQUESTED A PROSPECTUS IN 2022

COMPARED TO 52% IN 2019

Only asked to those who visited the website.

Maximising the value and impact of brand awareness, you need to build a meaningful connection with prospective students and their influencers.

However, students are less likely to share their data.

The proportion of respondents who registered their details on their university's Clearing website was only just over 1 in 3 (34.8%) in 2022 while over half (52%) did so in both 2019 and 2021.

The proportion who said they downloaded or requested a prospectus, of those who visited the website, was only 17% in 2022 compared to 43% in 2019 and 37% in 2021.

Privacy is a big topic in 2022: Apple and Google have made changes to the way data is collected and shared, reducing opportunities for targeting and third party data collection. Net Natives Trending Topics Survey Report for July 2022 shows that over half (51%) of students would prefer not to share data/cookies even if this means they will be served with more generic than personalised ads.

So how to continue a relationship with prospects and influencers needs careful consideration, and perhaps a combination of strategies: best practice landing pages and forms to capture those with high intent who are willing to share their details, and ongoing broader advertising to ensure that your messages reach key audiences where they are active.

Key advice from students

Q: What advice would you give to future students?

When looking at the overall themes for the advice to future students, 'don't stress or be nervous' was mentioned most often, followed by 'research before results day' and then 'research and be familiar with the Clearing process in advance of A level results day.' A higher proportion of Adjustment Students advised researching beforehand, compared to the other Clearing segments.

"Be prepared, not just the day before, but at least a month" ***Traditional Clearing Student***

"To create a list of possible universities beforehand and their clearing numbers ready to call in preparation. Starting with the university you would most like to attend as places in clearing go quickly" ***Mind Changer***

"The week or day before results day research unis that do clearing and put down the numbers of the uni for best and worst case scenario" ***Adjustment Student***

"Even if you don't expect to go through clearing, have a list of 5 universities that offer clearing the night before" ***Mind Changer***

Universities need to be on students' radars before A-level Results Day to recruit in Clearing

Recommendations

1. **Benchmark your brand awareness**

   Find out how well you're known, and by whom to help you plan your budget. You might already run some brand tracking, or use proxy measures such as search volumes to help understand where you are and are not known. Make sure you consider a range of audiences - and err on the side of broad brand awareness - to reflect the range of influencers impacting students' decision-making.

2. **Invest in raising awareness in advance of A level results day**

   Invest in raising awareness amongst your possible target audiences. Students are researching early, and when targeting multiple audiences an 'always-on' approach could be worth considering.

3. **Capture data to build connections**

   Use best practice for forms and landing pages, including placement of images and text, clear form placement above the fold, short forms (using two-part forms if more information is required) and "social proofing" such as student and alumni testimonials. Using a dedicated optimised campaign destination landing page increases conversion to inquiry by 66% (Net Natives data).

4. **Include your key messages**

   You won't necessarily know which courses will be in Clearing, so start with a focus on institution-level messages: student reviews, facilities, location and student support services - these are all key factors in students' decision-making about Clearing.

Universities need to be on students' radars before A-level Results Day to recruit in Clearing

Questions for you

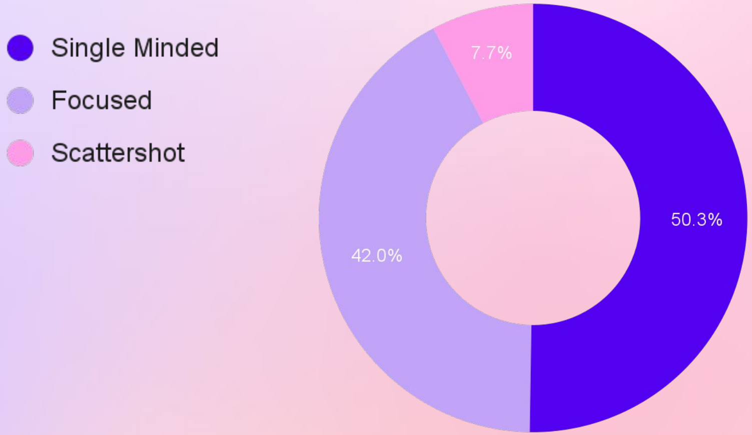
- How are you using your budget to build awareness and win attention?
- Are your campaign landing pages designed for data capture?
- How compelling is your "hook"?
- How are you building personalised connections with prospects and their influencers on an ongoing basis?

KEY FINDING 3

Even in a competitive Clearing, university selection is a **buyers' market**

Half of Clearing students are only contacting one institution

Q: Please select the number of institutions you contacted during Clearing



***Single minded**: contact 1 university through Clearing*
***Focused**: contact 2-4 universities*
***Scattershot**: contact 5 universities*

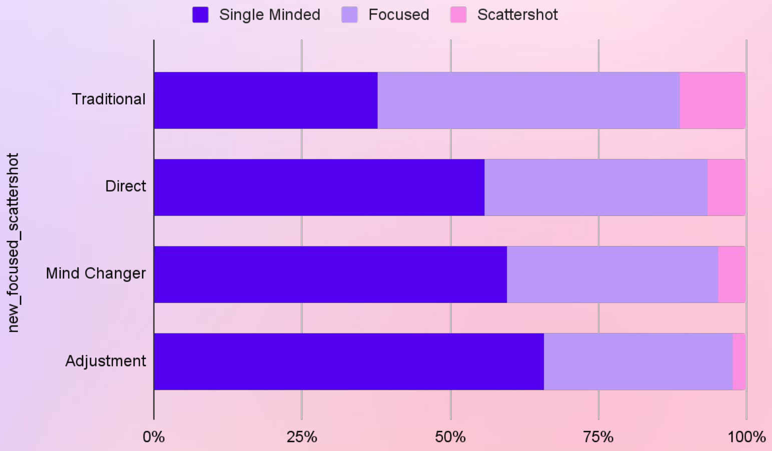
Half of Clearing students are only contacting one institution, while less than 8% are contacting 5 or more.

As illustrated in the previous finding, a university needs to be known to a Clearing applicant in advance. Students are creating their shortlists - and in some cases these are very short - prior to A level results day.

This time prior to A level results - which we know from the previous key finding runs over a long duration - can be highly competitive. Universities need to ensure they are available to prospective students throughout this period.

Traditional Students are most likely to be shopping around

Q: Please select the number of institutions you contacted during Clearing



Single minded*: contact 1 university through Clearing*
Focused*: contact 2-4 universities*
Scattershot*: contact 5 universities*

Breaking the data down by Clearing segment, the Adjustment Student (66%), Mind Changer (60%) and Direct Applicant (56%) were more likely to contact only one institution. Conversely, 38% of Traditional Students contacted one institution while half (51%) contacted 2-4.

The level of competitiveness, and where this competitiveness comes - in advance of results day, or in the conversion phase once an offer has been made - will vary depending on your audience. You therefore need to know your audience and pivot your strategy accordingly.

Demographic factors also influence the numbers of institutions contacted

While the **majority of NCS respondents were single minded** and only contacted one university through Clearing, there was variation across different demographic groups.

Mature students were more likely to contact only one institution (65% versus 47% for young) while young respondents were more likely to contact 2-4 (44% versus 30% for mature).

Students from a low participation background were also more likely than the respondent base as a whole to be single-minded, with 57% contacting only one institution, and much less likely than non-low participation respondents to contact 2-4 universities (36% versus 44% for non-low participation).

Male respondents have a higher propensity to be focused as they contacted 2-4 universities through Clearing.

Low tariff students were most likely to be scattershot, with 10% contacting 5+ universities throughout the Clearing period. Meanwhile, mid-tariff students were less focused than other groups, being almost equally likely to contact 2-4 universities as 1 university.

***Single minded**: contact 1 university through Clearing*
***Focused**: contact 2-4 universities*
***Scattershot**: contact 5 universities*

Tariff: low = <97 points, mid = 97-128, high = >128

	All Responses	Low participation	Non-low participation	Mature	Young	Male	Female	Low tariff	Mid tariff	High tariff
Single Minded	50%	**57%**	49%	**65%**	47%	47%	51%	49%	**46%**	51%
Focused	42%	**36%**	44%	30%	**44%**	**45%**	41%	41%	**45%**	41%
Scattershot	8%	6%	8%	5%	8%	8%	8%	**10%**	9%	8%

Students are considering multiple universities...

Q: Did you accept the first Clearing offer you received? (asked to those that received more than one offer)

51.8%

Who received more than one offer **did not** accept their first offer.

Q: Why did you not accept the first Clearing offer you received?

"I wanted to keep my options open and choose the best uni for me"
Direct Student

"In case I received a better offer"
Mind Changer

"Wanted to get a number of offers before accepting the best one"
Mind Changer

Of those respondents who received more than one offer, the majority (52%) chose not to accept their first offer.

The most common reasons cited for this are already having somewhere in mind, location and not being offered the course they wanted.

These comments from NCS survey respondents highlight the level of competitiveness that can occur in the conversion phase. While many students are not contacting multiple universities, it is not possible to know this at the point of contact being made, so the conversion piece is vital to invest in and get right. More so if your university tends to recruit those segments of students who are contacting multiple universities.

This competitiveness presents an opportunity: students are looking for the best university for them. They need you to tell them what you offer so they can make this decision. Use this opportunity to sell your course and institution.

What should we talk to prospects about?

Q: Please rate these institution factors when securing your Clearing place

Top institution factors

REPUTATION
STUDENT REVIEWS

INSTITUTION FACILITIES
e.g LABS, LIBRARY, CAFES

INSTITUTION LOCATION

Top course factors

COURSE AVAILABILITY

COURSE INFORMATION &MODULES

CAREER PROSPECTS & GRADUATION FEES

Students rate university reputation, facilities, and location as the top 3 institution factors impacting their choice of Clearing university.

Course availability, course information and modules, and career prospects and graduation rates are the top 3 course factors.

These need to be covered in Clearing communications, whether that's paid advertising campaigns, email communications, website pages or phone calls with admin or academic staff. The full range of data on all institution and course factors can be found on the NCS dashboard in Akero.

What should we talk to prospects about?

Q: Which of the following university information would you have liked to receive?

Q: Which of the following university information have you received? (Source: Net Natives' Student Pulse, up to December 2022, asked to prospective university students)

63%
FRESHERS WEEK

63%
ONLINE LEARNING PROVISION

61%
SCHOLARSHIPS/ FINANCIAL AID

61%
STUDY ABROAD OPTIONS

61%
PLACEMENTS/ INTERNSHIPS

60%
CAREER DESTINATIONS OF GRADUATES

The Net Natives' Student Pulse Survey data highlights more information gaps that students typically experience from universities.

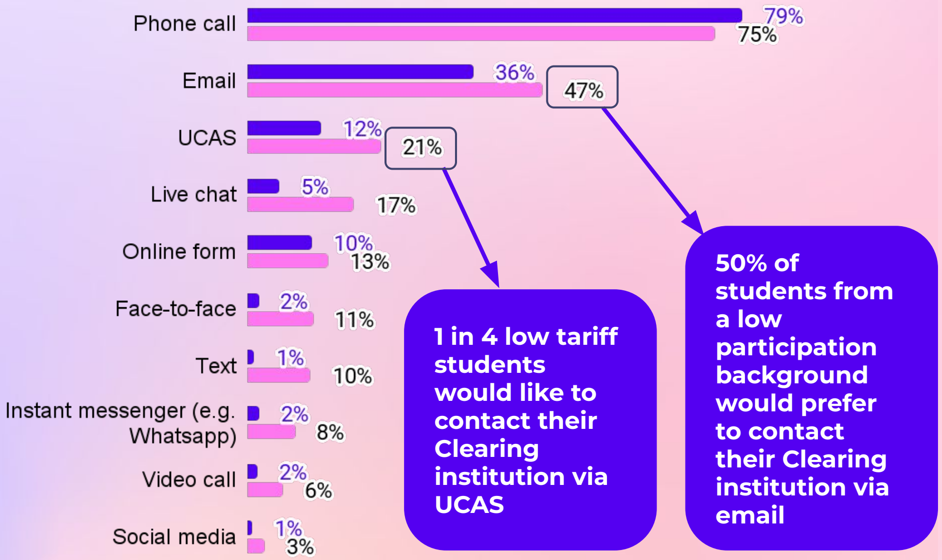
Freshers' week, study abroad options, online learning provision, scholarships and financial support, placements and internships, and career destinations of graduates are the most common pieces of information that students would like but have not yet received from universities (from a list of 17 options in total), all cited by at least 60% of Pulse respondents.

This information should also be incorporated into campaigns, with the opportunity to gain competitive advantage by providing this to prospective Clearing students.

What else might support **conversion?**

Q: How did you contact your Clearing Institution?

Q: How would you like to contact your Clearing institution?



The format that students want to use to contact universities and the format that universities make available to students have a slight disconnect.

While this may not be the deciding factor, it may offer marginal gains, particularly for those audiences who are contacting and receiving offers from multiple universities. Offering a range of channels to suit different students means communicating with them in a mode that they prefer, and may support stronger conversion.

The most notable gaps between how students contacted their Clearing institution and how they would have liked to make contact are for UCAS, email and live chat. However, UCAS alone is less useful for conversion activity, as it does not enable a conversation to take place.

However email, which is the second most popular option, offers ample scope for building connection.

Key
Formats students did use
Formats students would have liked to use

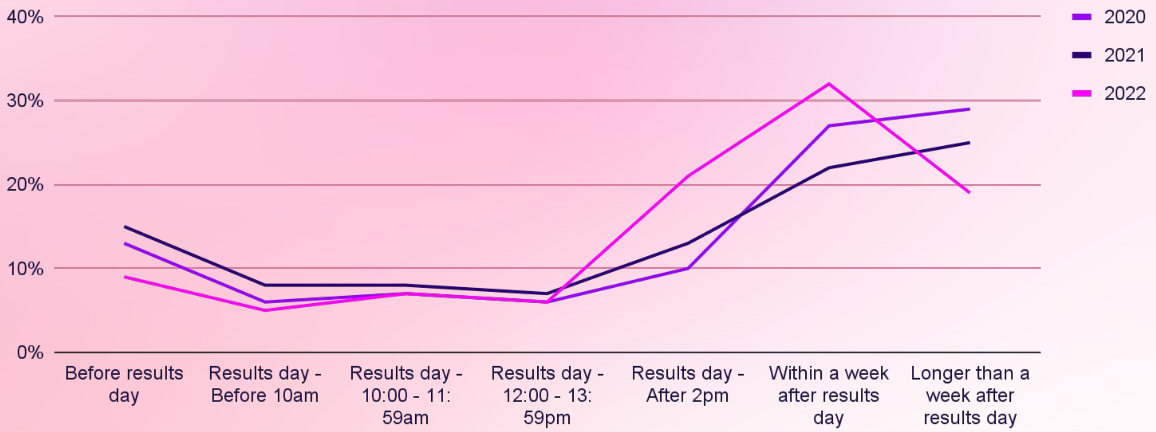
Data shows ⅓ respondents secured their Clearing place **within a week** of results day

Q: When did you secure your Clearing place?

2022 saw a high proportion of respondents (81%) securing their place within a week of results day. While slightly lower proportions secured their place either before results day, or on the morning of results day this year, the most notable difference from 2020 and 2021 was the drop off after a week.

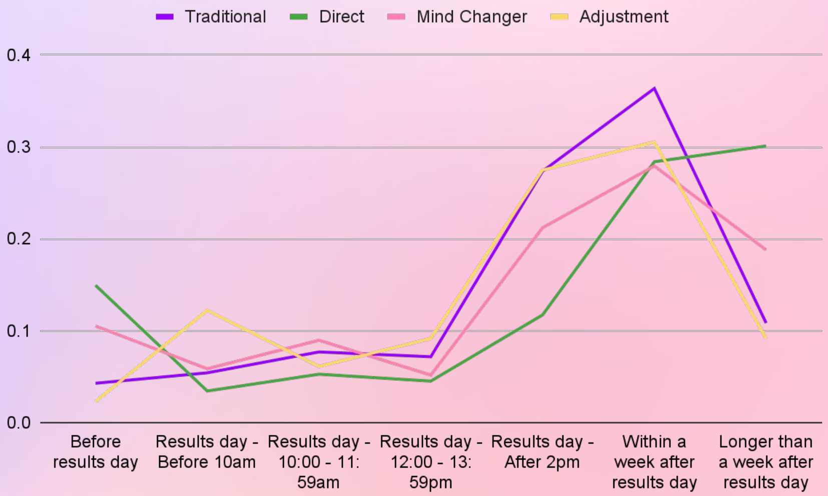
Fewer than 1 in 5 (19%) respondents in 2022 secured their place more than a week after results day.

This perhaps aligns with the "low intensity" label assigned to Clearing 2022 (DataHE), and is indicative of the kinds of students we saw in Clearing this year compared to 2020 and 2021: those with high grades but who were not able to achieve their place at their original high tariff choice.



Direct Students were more likely to secure their place early or late

Q: When did you secure your Clearing place?



This pattern varies by Clearing segment, Adjustment Students (10%) and Traditional Students (11%) were least likely to secure their place longer than one week after results day, while Mind Changers (19%) and especially Direct Students (30%) were most likely.

Adjustment Students, Traditional Students and Mind Changers showed similar patterns of research; they were all most likely to secure their place within the week after results day (rather than results day itself). Traditional Students were most likely to do this, with over 1 in 3 (36%) securing their place during this time.

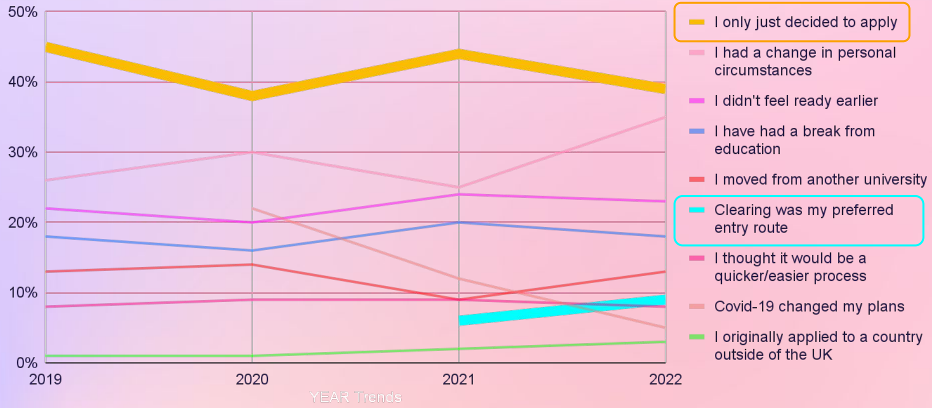
Conversely, Direct Students were most likely to secure their place longer than a week after results day, or in advance of A level results day, as they are less likely to be waiting for their results.

This data again supports decisions about how to phase budget, and how to schedule conversion communications for different types of students.

Direct to Clearing looks to be growing as a preferred entry route to university

Q: Why did students apply for the first time through Clearing? (Multiple answers allowed)

Note: this question was only asked to Direct Students



The 2022 survey saw a reduction in the proportion of direct to Clearing students who had only just decided to apply, from 44% in 2021 to 39% in 2022. Over time there is currently no definitive trend for this.

In 2022 there appears to be a relationship between application behaviours and concerns about cost of living.

Direct Students are more likely to have said they only just decided to apply if they cited cost of living as a barrier.

2022 also saw an increase in those who said Clearing was their preferred entry route (from 6% to 9%). This option was added for the first time in 2021 but is a trend to watch over the next few years.

This data highlights the need to reach out to prospective students and influencers to win attention and build connection at any time, as they might be planning to make their application later in the year. It also changes the way in which campaign success may need to be measured, for example, engagement in a January deadline campaign may elicit results at Clearing.

Students are open about Clearing

National Clearing Survey data has shown, year on year, that Clearing is becoming de-stigmatised. And 2022 is no exception. Advice from respondents to future Clearing students reinforces that it is a process to be used as a legitimate route to university, putting the decision about when and how to enter university into a student's own hands.

"That it isn't a bad thing to have to consider clearing as an option"
Direct Student

"Make it seem like less of a thing only failures do, my course is second in the country (actuarial sciences), and it [Clearing] is perceived online as something people who fail do"
Direct Student

"Future students should always know that there's always hope and time for clearing, and it isn't something to be ashamed of, we all have our own different circumstances that could have led to having lower grades than expected and that's completely fine..."
Direct Student

Q: Based on your experience of the Clearing process if there was one thing that you think future students should know that would help them, what would it be?

Even in a competitive year Clearing is a buyers' market

Recommendations

1. **Start with awareness**

   Awareness is a crucial starting point; without it you will not be on the radar for Clearing.

2. **Work to build connection and drive action**

   Just listing a course, even a popular one is not enough; you need to work to build connection at brand and course level. You need to drive an action, whether that's submitting their data in advance of Clearing, making a Clearing application or accepting their offer. NCS indicates you'll be working harder to get that data too, so think about how you're incentivising people to share their data with you, as well as other ways to build connections without this.

3. **Support conversion**

   You need strong call handlers to support conversion. Ensure they have all the information to hand that prospective students want to know about. Consider diversifying communication channels on Results Day and beyond, while ensuring you are able to maintain the quality of the conversation and use these to positively impact conversion.

Even in a competitive year Clearing is a **buyers' market**

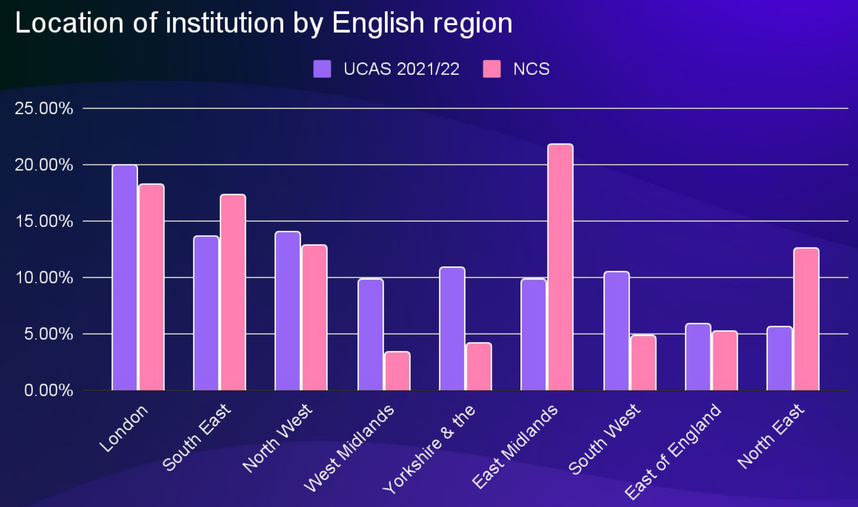
Questions for you

- Phone calls are still the dominant way to contact universities in Clearing. What other touchpoints are you offering to stand out?
- How are you equipping call handlers with the information that students want?
- Are you tracking calls and other touchpoints and attributing them to your marketing activity?

KEY FINDING 4

Students from London are travelling further for university

How representative is NCS by region of provider?



UCAS acceptances by region of provider, 2021/22

The proportion of responses by region of provider for the National Clearing Survey are shaped by the partners who distribute the survey.

In this section we focus on English regions only, as we have very few responses for Wales, Scotland or Northern Ireland, making that data less reliable.

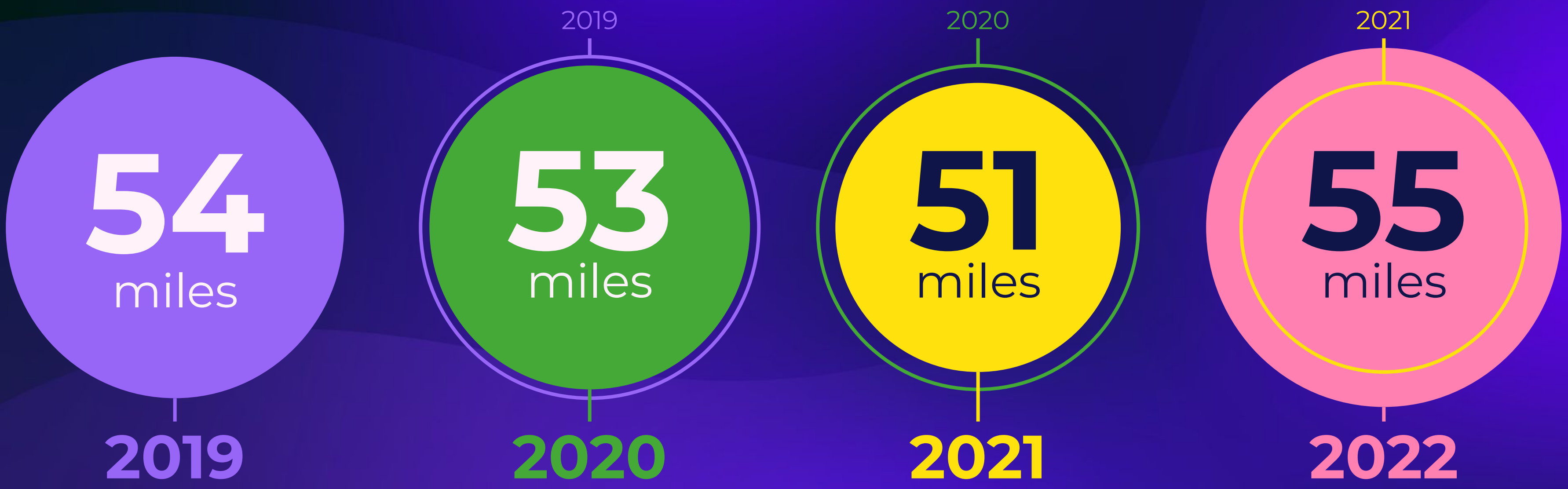
Looking at the region where the university is based - rather than the home region of the respondents - we are over-represented by respondents who enrolled at universities in the East Midlands, North East, and South East. We are under-represented by respondents who enrolled at universities in the West Midlands, Yorkshire and the Humber, and South West.

There is no national dataset available for Clearing enrollments by region. Therefore the National Clearing Survey data helps understand geographical interest from Clearing students; their propensity to travel for university, how far and to where.

However, these findings must be read with the above over- and under-representation in mind.

2022 saw Clearing students travelling an average distance of 55 miles to their chosen university

In 2021 there was a drop in average distance travelled to university. However, this has risen again in 2022 to match previous years. Overall, the relative stability of this helps with understanding the approximate geographic pull of your university.



Key finding 4: Clearing students from London are travelling further for university.

However this data changes quite dramatically when looking at the students' home region (England only) and the average distance travelled to their chosen university location.

Students from London are moving further away year on year compared to other English regions.

Those in the South East and South West are consistently travelling further for university.

Therefore, London and the South East present the strongest opportunity: they are the two biggest regions by applicants, and together comprised 38% of applicants via UCAS in the January 2022 deadline.

These regions are also those with the largest numbers of 18 year olds: 107,066 in the South East, and 100,378 in London in 2022, with moderate growth in the number of 18 year olds in 2023 (data extrapolated from Census 2021 estimates for usual residents in England and Wales by single year of age, accessed via ONS.gov.uk).

Student region (England)	2019	2021	2022	Change from 2019 to 2022
London	41	42	59	+18
East of England	60	51	73	+14
North East	24	27	30	+6
South East	72	83	73	+1
East Midlands	50	36	46	-4
South West	86	84	75	-11
Yorkshire & the Humber	72	52	58	-14
North West	65	53	47	-18
West Midlands	75	59	47	-28

London

41 — 42 — 59

2019 2021 2022

+18 miles

There is regional movement across England, but home regions continue to dominate in university choice

In general, those in the North of England are more likely to remain within region than those in the South or London.

For all regions except for the West Midlands, students are more likely to stay in region than study outside of it.

For the West Midlands, we see a high propensity to study in the East Midlands. However, this may be a result of the over-representation of participating universities in the East Midlands (see p63).

Students movement between regions within England is most likely to be to an adjoining region. All of this highlights the ongoing regionality of UK recruitment even in Clearing.

	% going to region (England only)								
Student region (moving from - England only)	**London**	**East of England**	**North East**	**South East**	**East Midlands**	**South West**	**Yorkshire & the Humber**	**North West**	**West Midlands**
London	58	4	3	11	15	2	1	4	1
East of England	14	27	9	14	14	4	6	9	2
North East	1	1	82	1	4	1	4	4	1
South East	15	8	7	40	14	3	2	7	0
East Midlands	1	2	6	7	62	1	6	9	4
South West	11	1	5	28	9	30	1	6	1
Yorkshire & the Humber	2	1	21	5	11	2	41	13	1
North West	6	1	11	3	10	0	5	58	3
West Midlands	1	1	3	8	34	6	3	13	29

There is regional movement across England, but home regions continue to dominate in university choice

Region (England only)	Important factors (/10) close to home	University choice home region %
North East	7	82
North West	6.2	58
East Midlands	6	62
Yorkshire & the Humber	5.8	41
South West	5.7	30
East of England	5.5	27
London	5.4	58
South East	5.3	40
West Midlands	5.3	29

There is a correlation between the proportion of students who stayed in their home region, and the relative importance of a university being close to home.

London and the South East are the outliers here, however given their geographical locations it is possible to be close to home while being in a different UK region.

For example, students from London had a relatively high propensity to enrol at universities in the South East, while students from the South East had a relatively high propensity to study in London.

Meanwhile, 'Close to home' and 'Institution location' are strongly correlated as important factors (0.45). This suggests that those who place high value on location want or need it to be close to home, and those placing lower value on this are more open to travelling for university.

Those from The South have increased propensity to study out of region in 2022

When looking at how the propensity to study out of region in England has changed over time we see an inconsistent picture across the country.

For those in London, the South West and the East of England, we are seeing a trend over time in moving out of region. Although those in London are still more likely to stay in region than move out.

Students considering moving away may be open to a broader range of destinations.

However, this needs to be taken in the context of the previous two slides, geographical proximity plays a part to some extent for many students.

Region	% staying within region		% change
	2019	2022	
East of England	59	27	-54%
South West	49	30	-39%
London	64	58	-9%
North East	80	82	3%
Yorkshire & ..	39	41	5%
East Midlands	56	62	11%
North West	50	58	16%
South East	25	40	60%
West Midlands	11	29	164%

Students from London are travelling further for university

Recommendations

1. **London could be an untapped market**

   Explore your opportunities in London if your university is located in an adjoining region or is within the distances typically travelled by students from London. This includes understanding which audiences segments and specific boroughs of London may deliver strongest ROI; London's incredibly large and population is relatively expensive to target, so understanding your university's opportunity specifically is key to successful recruitment.

2. **Focus on neighbouring regions**

   Look to neighbouring regions for opportunities in Clearing, particularly if you are in the Midlands or the South.

3. **Sell your location**

   Use the opportunity to educate prospective students about your location and what it can offer; those who are open to travelling are less concerned about specific location.

Students from London are travelling further for university

Questions for you

- Is there an indication of interest from different locations that you can leverage for Clearing?
- Are you selling your unique location?
- Do you have insight on students from London and the South East, and the potential opportunity for **your** university?

Cost of Living

Cost of living has decreased as a barrier to university...

The increased cost of living is a daily reality in the UK, and topic of much discussion and media coverage. The National Clearing Survey asks respondents about cost of living as a barrier to attending university, thereby providing insight into its impact on Clearing students in 2022.

Cost of living was cited as a barrier by a smaller percentage of respondents overall in 2022 (40%) than 2021 (47%) and 2020 (45%).

The following groups are most likely to cite Cost of Living as a barrier.

47% MATURE CLEARING STUDENTS

47% FREE SCHOOL MEALS RECIPIENTS

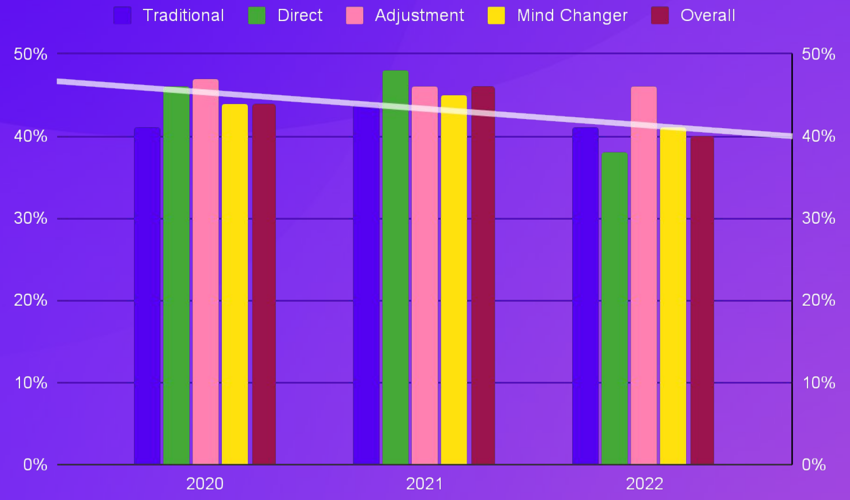
46% STUDENTS FROM LOW PARTICIPATION BACKGROUNDS

45% TRADITIONAL CLEARING STUDENTS

42% RESPONDENTS WHO ATTEND POST-92 INSTITUTIONS

Q: Please select any of the factors that are barriers to you going to university.

% of respondents citing "Cost of living" as a barrier to attending university



...but remains the biggest barrier to university

Cost of living remains the biggest barrier, as it has been year on year, and needs to be addressed by universities as a key concern for prospective students.

“No barriers” also saw a marked year on year increase of 19% to 32% as we come out of the covid pandemic. This may be a level we should expect when not in a pandemic and is a trend to watch over the next few years.

‘No barriers’ also varies depending on socio-demographic factors:

42%
MALE RESPONDENTS WERE MORE LIKELY TO SAY THERE ARE NO BARRIERS

35%
RESPONDENTS FROM LONDON WERE SLIGHT MORE LIKELY TO SAY THERE ARE NO BARRIERS

28%
THOSE ON FREE SCHOOL MEALS WERE LESS LIKELY TO SAY THERE WERE NO BARRIES

Q: Please select any of the factors that are barriers to you going to university. *Please note: this question was asked in free text form prior to 2020 and so is not directly comparable for previous years*

Cost of living is a concern for enrolled students as well as prospective students

Universities should be - and are - mindful of money issues for prospective students, putting in place support structures. Additional insight from Net Natives' Trending Topics Survey Report provides a deeper understanding of the issue.

LESS THAN 1/2

SAID THEIR STUDENT LOANS COVER THEIR LIVING COSTS

Less than ½ said their student loan sufficiently covered their living costs

44%

NEED ADDITIONAL FUNDING

44% of first year students said that the cost of living meant that they needed to secure additional funding before going to university

28%

CHOSE TO GO TO THEIR HOMETOWN/LOCAL UNI

28% said the cost of living meant that they chose to go to their hometown or a local university

27% deferred their application

OVER 3/4

NEED FINANCIAL SUPPORT

Over ¾ students said that they needed some form of financial support during their studies, which included employment.

Source: Net Natives Student Trending Topics, September 2022

Key findings

01

Students now have more people, having more influence, than before.

02

Universities need to be on students' radars before A-level Results Day to recruit in Clearing.

03

Even in a competitive Clearing, university selection is a buyers' market.

04

Clearing students from London are travelling further for university.

Recommendations

01

Clearing represents new and existing audiences; make sure you are prepared for people at different stages of their research and application journey

02

Just targeting students isn't enough - consider all of your audiences, and all of the places they might come into contact with your brand

03

Clearing decisions are impacted by year around activity so invest in brand awareness well in advance of Clearing to build reputation and demand

04

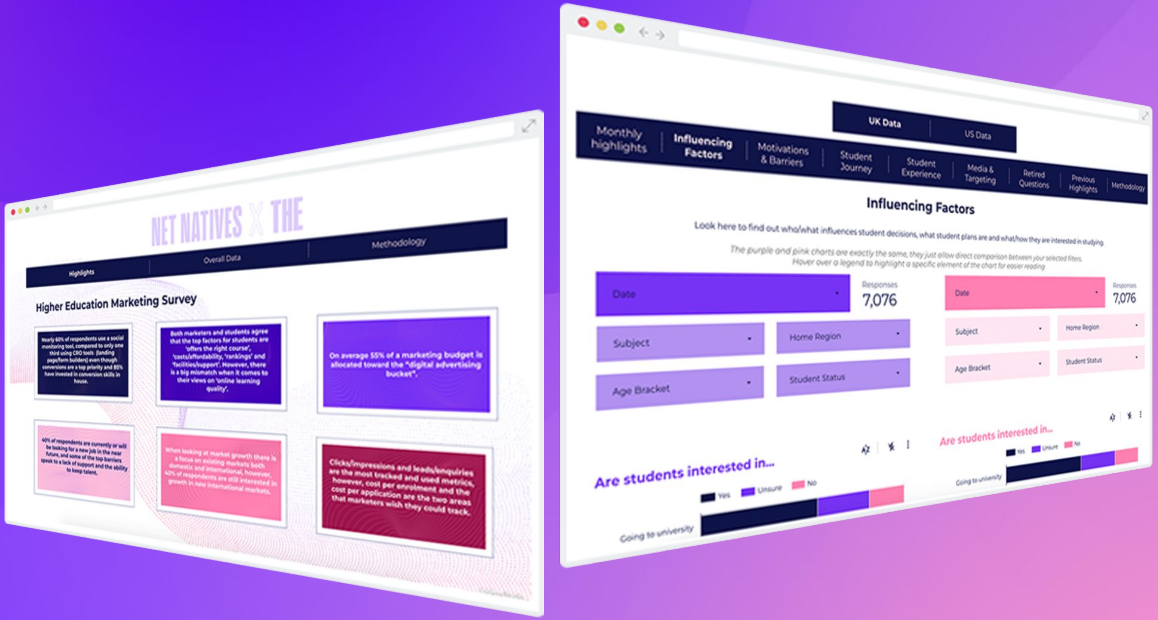
Consider the full journey from awareness through to converting your Clearing applicants to accept their offer and enrol

Net Natives Student Pulse, Trends and HEMS

We run a range of regular research with our panel which is freely accessible to you:

- ➔ **Higher Education Marketing Survey (HEMS)** now live, closes 17 February 2023 (see the HEMS 2022 dashboard for insights from the 2022 survey)
- ➔ **Pulse** - our monthly student tracker
- ➔ **Trending Topics** - our monthly insight into students' take on topical events
- ➔ Take part in NCS next year: nationalclearingsurvey.com/take-part

If you do not already have a login for Akero please contact marketing@netnatives.co.uk and we can set up access for you.



National Clearing Survey 2023 - Take Part

The National Clearing Survey is only made possible with the support and cooperation of our university partners. And in return, each partner receives:

Early access to the NCS key findings and dashboard before general release, giving you a head start in planning your 2024 Clearing strategies	Your own institution's findings benchmarked against the national average, or other similar universities, giving visibility on how your university compares and differs	Exclusive dashboard features allowing you to segment the data, make comparisons and view year-on-year trends
The opportunity for your students to win prizes to help with their ongoing studies	Plus, it's free to take part	**Express your interest for 2023**

Thank You

We'd love to help you with
any upcoming research projects.

Book a chat with us today:

james.brown@netnatives.com

James Brown
Head of Client Growth, UK
james.brown@netnatives.co.uk

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