

NATIONAL CLEARING SURVEY

2021 / 22

NET NATIVES

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REPRESENTATIVE. INDEPENDENT. INSIGHTFUL.

Say hello to the
National Clearing Survey.

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Clearing Survey 2022/23



About the National Clearing Survey

The National Clearing Survey was launched to better understand the student journey through Clearing. It is representative, independent and is the only one of its kind. This is the seventh edition of the report since launching in 2015.

The National Clearing Survey is a major research initiative, analysing the Clearing journey from the point of view of the student. This year's survey partnered with one in three Russell Group institutions and three in five Post 92 HEIs, plus public and specialist institutions. The research analysed over 500,000 different data points and includes 2,000+ deep-dive qualitative surveys from students who attend 113 different UK HEIs. The results have been benchmarked against the findings from the previous six years of research to identify short- and long-term trends, resulting in the most insightful National Clearing Survey ever.

Introduction

Rounding up the last year of A Level Results Day and Clearing is no easy task. We've seen panicked u-turns and teacher assessed grades. The 18-year-old demographic on the rise for the first time, along with direct and mature applicants. Lockdowns have caused frenzy and the sector has really felt the pinch of Brexit as international numbers have been up in the air. A lot has happened.

But here is where the National Clearing Survey and its seventh iteration comes into its own. With year-on-year data, we can see the trends in student behaviours, motivations and stressors. What's changed and fluctuated can also be identified, understanding what's unique to the 2021 Clearing student mindset. All of which help institutions all over the country better see both the opportunities and the threats they face in 2022 and beyond.

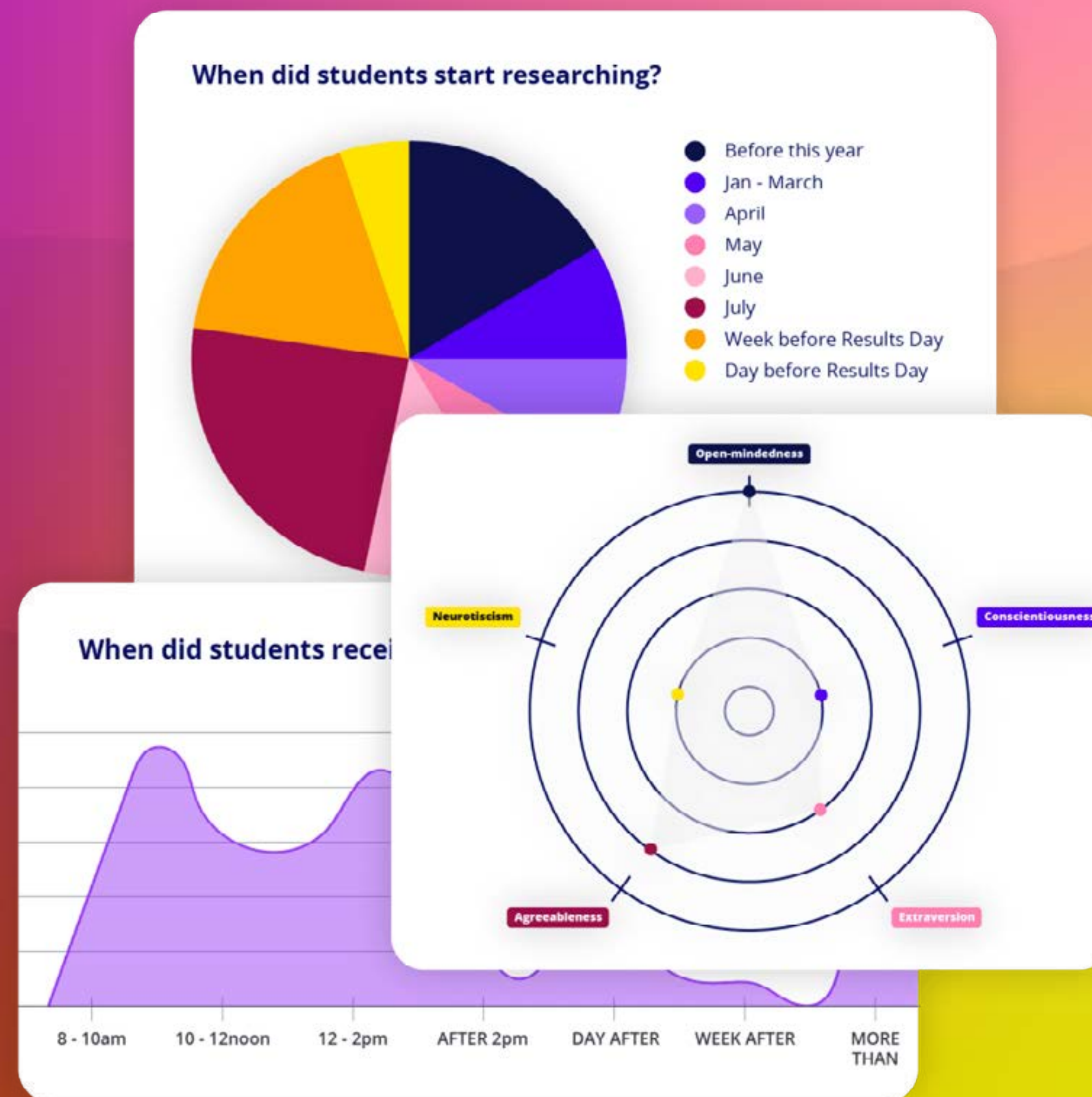


THIS REPORT WILL TAKE YOU THROUGH THE KEY FINDINGS FROM THE 2021/22 NATIONAL CLEARING SURVEY, AND FOR THE FULL DATASET WHERE YOU CAN INTERROGATE AND AGGREGATE THE DATA, YOU CAN HEAD TO THE NCS DASHBOARD.



TO AKERO

All you need to do is log into Akeru, head to the 'Insights' tab, and you'll find the 'NCS' dashboard there.



Methodology

The National Clearing Survey 2021/22 was open to all students who applied to university through Clearing for the 2021/22 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 applicants. The survey opened on the day of A Level exam results and closed early November. 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.

For 2021, in total, we conducted over 2,262 surveys; with students participating from 113 different UK institutions. In total, 43 institutions partnered in the 2021/22 survey.



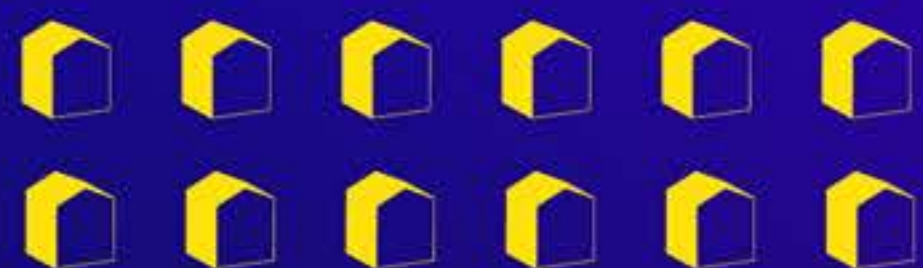
2,500+ DEEP-DIVE SURVEYS

500,000+ DATA POINTS ANALYSED

43 PARTNERING INSTITUTIONS

LOCATION

STUDENTS GOING TO 113 INSTITUTIONS



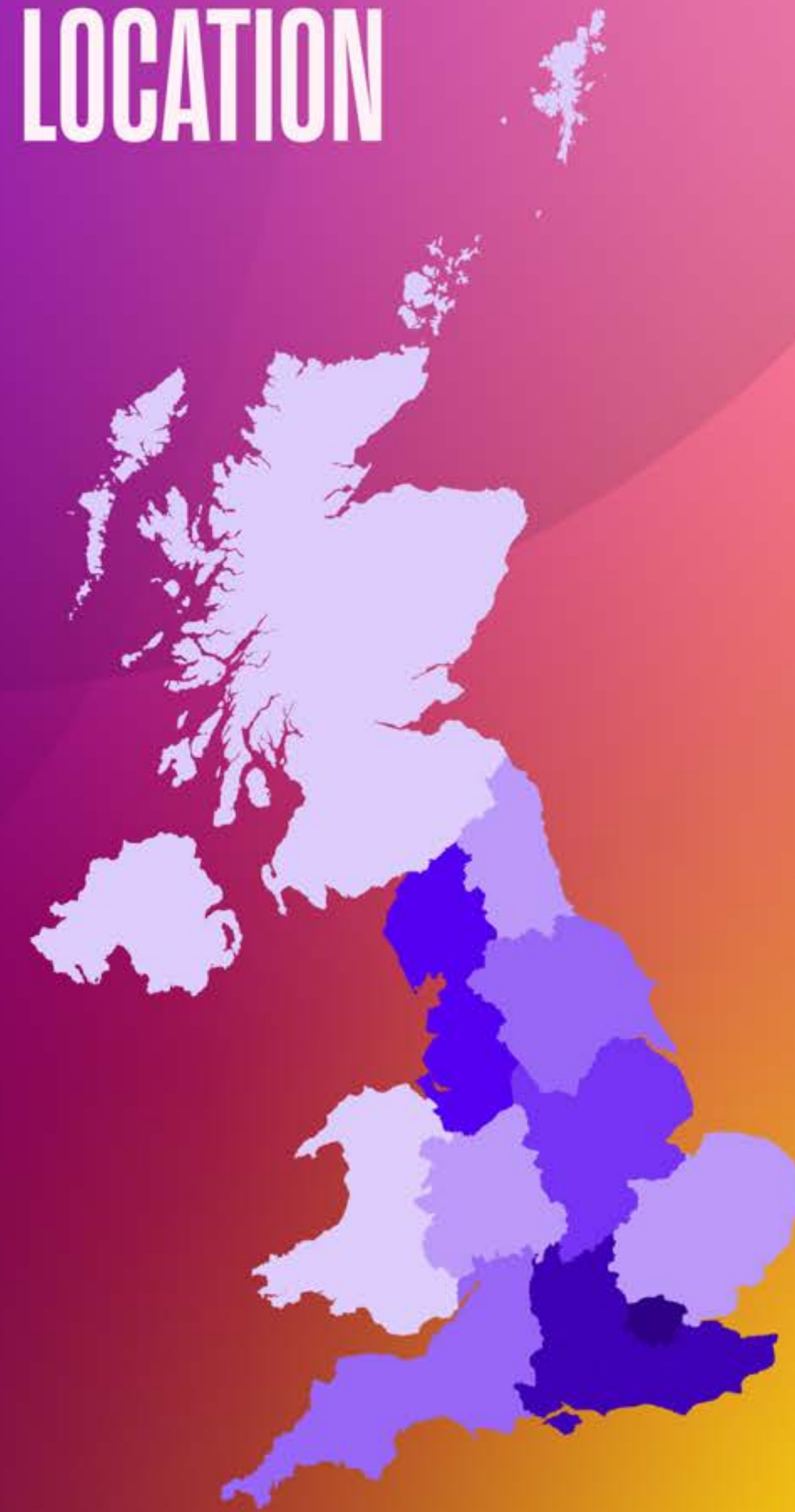
64% FEMALE
32% MALE
4% OTHER

20-21 AVERAGE AGE

20₃ 3 IN 20 RUSSELL GROUP

3 IN 5 POST-92

1 1 8 AVERAGE UCAS POINTS



Key findings at a glance...



Clearing is increasingly an active choice for students.

Be proactive in your recruitment.



Clearing still remains an enigma to many students.

Have Clearing content available throughout the entire year. And more clarity.



The radius Clearing students are willing to travel is shrinking.

Segment audiences by area with local students being key. Use relevant, specific messaging to affirm your institution is a viable choice.



Students continue to use a wide variety of channels.

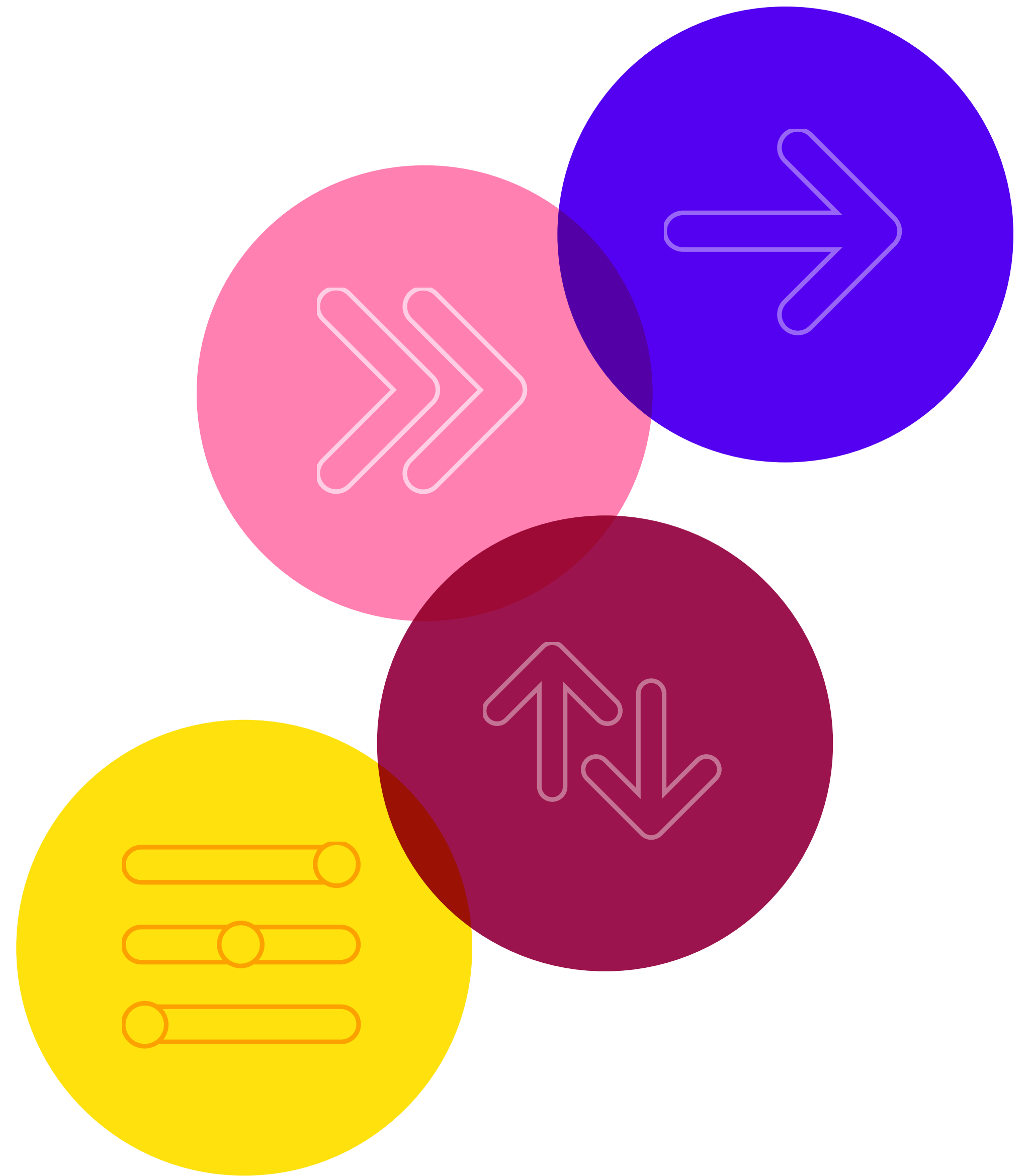
Make sure you have relevant content on all channels your audience are using and tailor messaging to each platform and audience.

SECTION 01: THE FOUR CLEARING PROFILES

Section 01: The four Clearing profiles

Since its launch seven years ago, the personas revealed in the National Clearing Survey have formed the backbone of hundreds of marketing strategies.

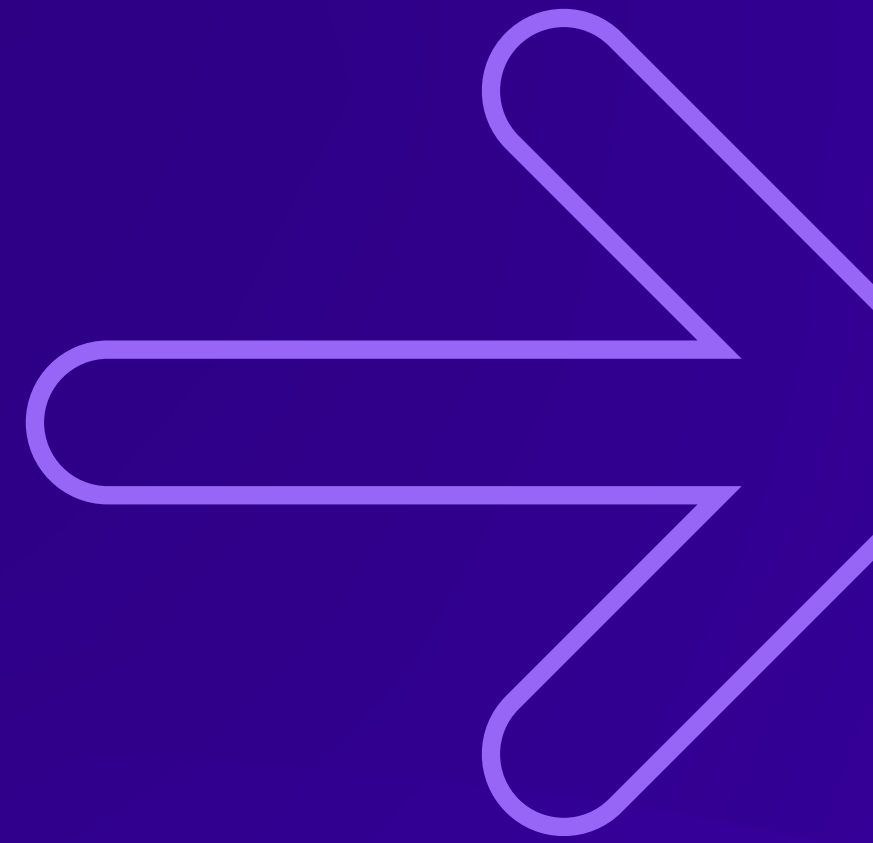
The research initially revealed four distinct personas accessing higher education through Clearing: The Traditional Student, the Direct Applicant, the Mind Changer and the Adjustment Student. And they're all still with us after seven years of refinement. Does this mean that the Clearing audience is static? Absolutely not. These personas have stayed the same because they've stood up to the rigours of both critical analysis and practical, strategic marketing application.





Each segment has been developed using data from our survey responses, and their identities have been measured and presented using demographics, education, destination, motivation, influencers and their top social platforms used daily. This year, we have added more information to each persona, and over the years have tracked behaviours such as barriers to enrolment, the likelihood of being first-generation higher education students, and the prevalent emotions that they feel pre, and post, Clearing.

This segmentation portrays the different characteristics beyond what might be considered a 'traditional' Clearing student. When looking at market share from 2016 through to this year, we can see that the Direct Applicant is the only segment that has grown - and from our data we have seen that it has grown again year-on-year, from 33% in 2019 to 35% of the Clearing population in 2021. It illustrates the opportunities for smart targeting within an institution's strategy that might not have been previously understood or considered.



THE TRADITIONAL CLEARING 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.



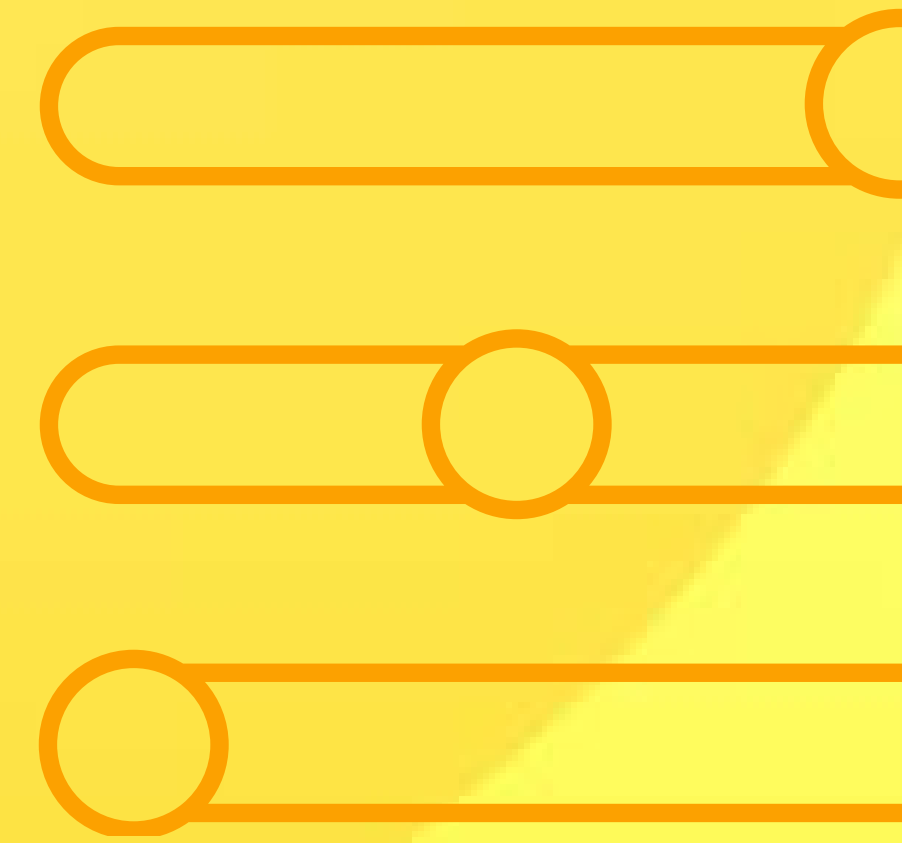
THE DIRECT APPLICANT

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 social or environmental factors, which have influenced them to change their mind on their institution, course or location.



THE ADJUSTMENT STUDENT

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

THE TRADITIONAL CLEARING STUDENT

SAMPLE:

32%

AGE AVERAGE AGE AVERAGE
19

GENDER

66% FEMALE 32% MALE

1.2% PREFER NOT TO SAY 0.5% OTHER

TYPE OF INSTITUTION:



MOST LIKELY TO STUDY:

SUBJECTS ALLIED TO MEDICINE

BUSINESS & ACCOUNTING

SOCIAL SCIENCES



AVERAGE UCAS POINTS

MOTIVATIONS



SUBJECT

COURSE CONTENT

CAREER PROSPECTS

COST OF LIVING

ENTRY REQ.

MENTAL HEALTH

THE TRADITIONAL CLEARING STUDENT

FIRST GEN:

47%

INFLUENCES:



TOP SOCIAL MEDIA:



TOP TRADITIONAL MEDIA:



EMOTIONS:

RECEIVED RESULTS

DISAPPOINTED
STRESSED
NERVOUS

LOOKING FOR A PLACE

STRESSED
ANXIOUS
NERVOUS

SECURED A PLACE

RELIEVED
HAPPY
EXCITED

BEHAVIOUR:

52% NO RESEARCH

29% EARLY RESEARCHER

THE DIRECT APPLICANT



SAMPLE:

34%

AVERAGE AGE
23
AVERAGE AGE

GENDER

62% FEMALE 36% MALE

0.7% PREFER NOT TO SAY 0.7% OTHER

TYPE OF INSTITUTION:

POST 92 OTHER

MOST LIKELY TO STUDY:

BUSINESS & ACCOUNTING

SOCIAL SCIENCES

SUBJECTS ALLIED TO MEDICINE

1

1

4

AVERAGE UCAS POINTS

MOTIVATIONS



SUBJECT

COURSE CONTENT

CAREER PROSPECTS

COST OF LIVING

MENTAL HEALTH

COST OF TUITION

THE DIRECT APPLICANT



FIRST GEN:

53%

INFLUENCES:



PARENTS/GUARDIANS



FRIENDS



UNIVERSITY STAFF

TOP SOCIAL MEDIA:



TOP TRADITIONAL MEDIA:

ON-DEMAND TV

LIVE TV

RADIO

EMOTIONS:

RECEIVED RESULTS

HAPPY
NERVOUS
EXCITED



LOOKING FOR A PLACE

NERVOUS
ANXIOUS
EXCITED



SECURED A PLACE

HAPPY
EXCITED
RELIEVED

BEHAVIOUR:

65% NO RESEARCH

21% EARLY RESEARCHER

THE MIND CHANGER



SAMPLE:

23%

AGE AVERAGE AGE AVERAGE AGE
20

GENDER

68% FEMALE 30% MALE

0.2% PREFER 2%
NOT TO SAY OTHER

TYPE OF INSTITUTION:



MOST LIKELY TO STUDY:

BUSINESS &
ACCOUNTING

HUMANITIES

SOCIAL
SCIENCES



AVERAGE UCAS POINTS

MOTIVATIONS



SUBJECT

COURSE CONTENT

CAREER PROSPECTS

COST OF LIVING

ENTRY REQ.

MENTAL HEALTH

THE MIND CHANGER



FIRST GEN:

52%

INFLUENCES:



PARENTS/GUARDIANS



FRIENDS



UNIVERSITY STAFF

TOP SOCIAL MEDIA:



TOP TRADITIONAL MEDIA:

ON-DEMAND TV

LIVE TV

RADIO

EMOTIONS:

RECEIVED RESULTS

HAPPY
RELIEVED
NERVOUS

LOOKING FOR A PLACE

NERVOUS
STRESSED
ANXIOUS

SECURED A PLACE

HAPPY
RELIEVED
EXCITED

BEHAVIOUR:

53% NO RESEARCH

25% EARLY RESEARCHER

THE ADJUSTMENT STUDENT

SAMPLE:

6%

AGE AVERAGE AGE AVERAGE AGE AVERAGE
19

GENDER

56% FEMALE 43% MALE

0% PREFER NOT TO SAY 0.8% OTHER

TYPE OF INSTITUTION:

POST 92 OTHER

MOST LIKELY TO STUDY:

LAW

BUSINESS & ACCOUNTING

SOCIAL SCIENCES

1

3

6

AVERAGE UCAS POINTS

MOTIVATIONS

SUBJECT

COURSE CONTENT

CAREER PROSPECTS

COST OF LIVING

MENTAL HEALTH

CONFIDENCE

THE ADJUSTMENT STUDENT

FIRST GEN:

48%

INFLUENCES:



TOP SOCIAL MEDIA:



TOP TRADITIONAL MEDIA:



EMOTIONS:

RECEIVED RESULTS

HAPPY
EXCITED
SURPRISED

LOOKING FOR A PLACE

NERVOUS
STRESSED
ANXIOUS

SECURED A PLACE

HAPPY
EXCITED
RELIEVED

BEHAVIOUR:

49% NO RESEARCH

24% MID RESEARCHER

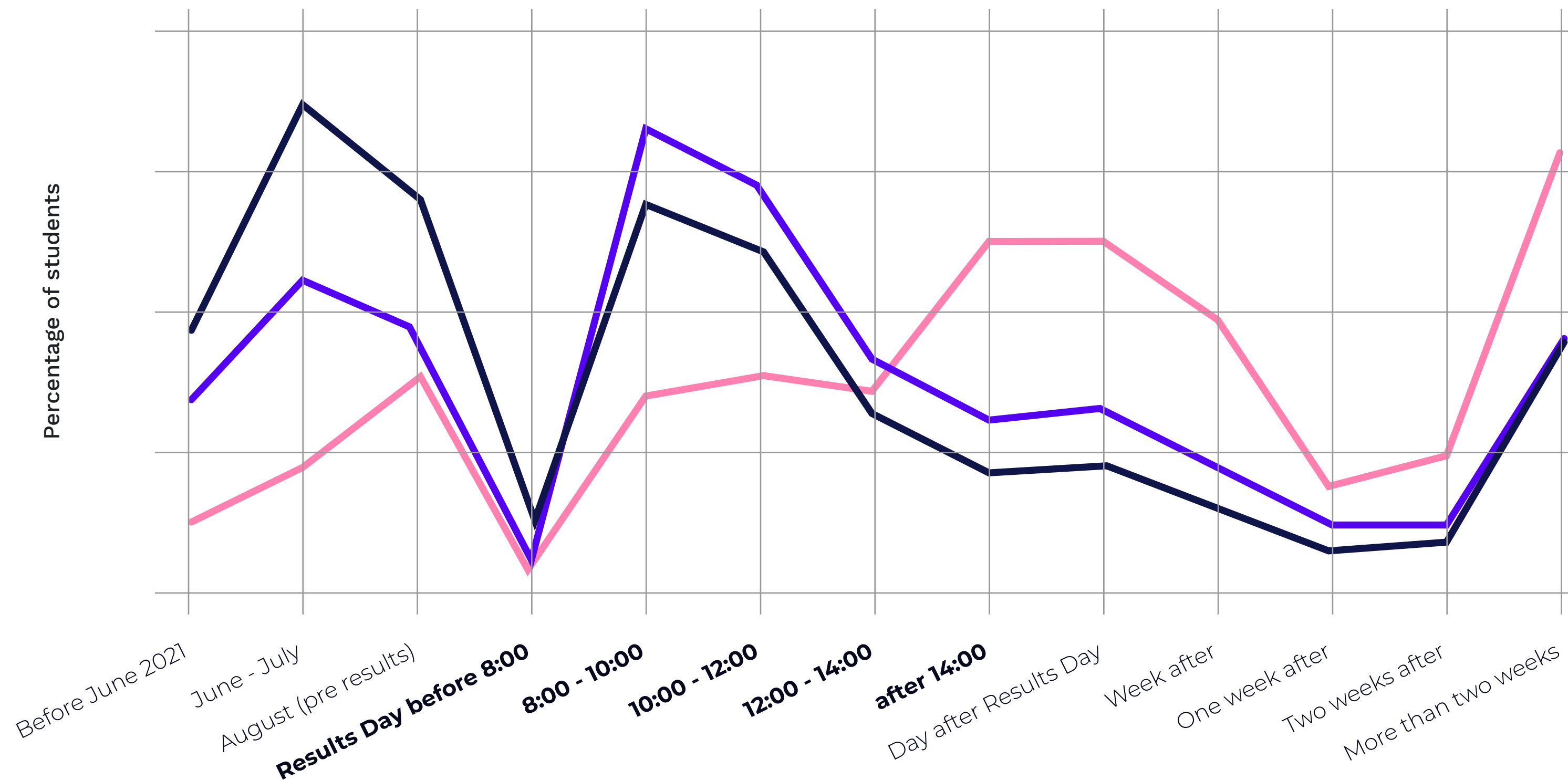
SECTION 02: THE CLEARING TIMELINE

Section 02: The Clearing Timeline

The National Clearing Survey timeline is used in student recruitment strategies across the entire country.

When did students do the following?

- Started looking for a place
- Contacted their first institution
- Secured their Clearing place



This year, we wanted to make these timelines even more insightful and interactive. So we've embedded all the timelines onto the NCS dashboard so that you can interrogate, compare and digest the insights that are most useful for you.

You can filter them down by persona, behaviour, age group or region.

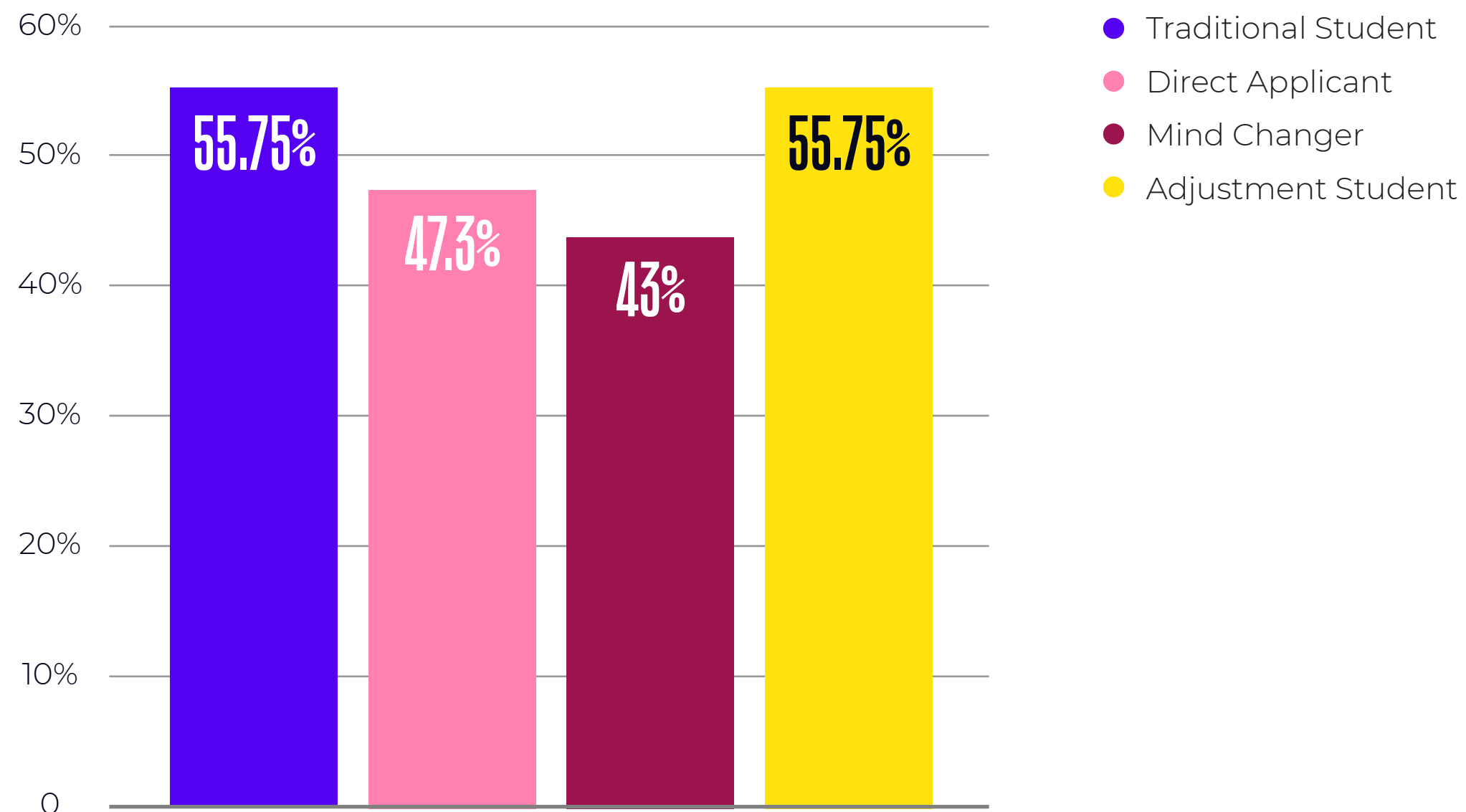
Of course this is free to access and all you need to do is [log in here](#).

SECTION 03: KEY FINDINGS

Section 03:

Key findings

Percentage of students not getting a place at the first institution they contact



01. Clearing is increasingly an active choice for students.

Clearing has increasingly become an active choice for students over the years, and 2021 continues that trend. But while this may be the case, we're seeing students be even more conscious with their decision making, and they aren't afraid to change existing plans on the day.

Only half of students will contact their original institution in Clearing. Which is down from two in three who would have done in 2018.

In other words, while students may be active, institutions need to be proactive in order to hold onto existing offer holders.

ONLY HALF OF STUDENTS WILL CONTACT THEIR ORIGINAL INSTITUTION IN CLEARING.

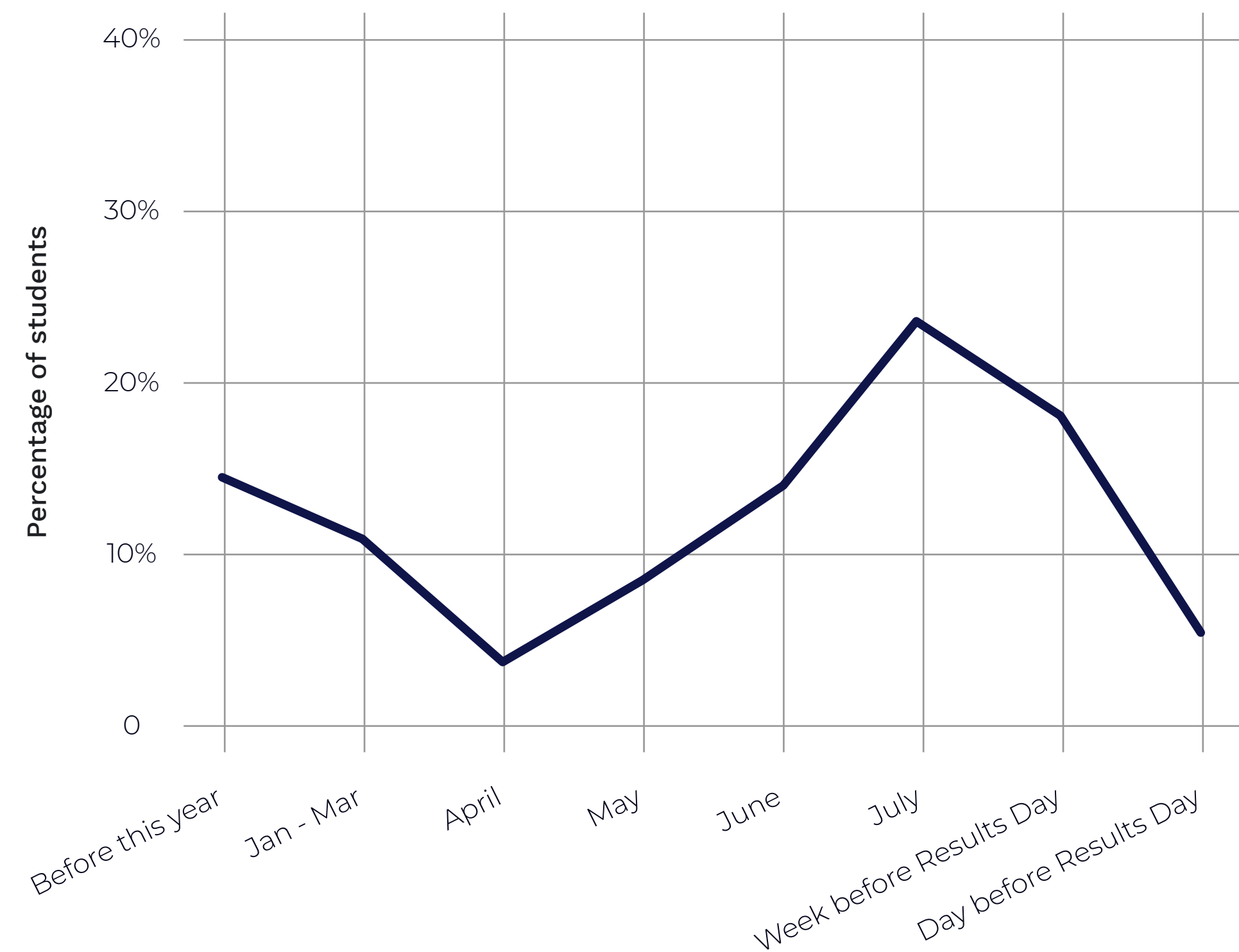


AND ONE IN TWO STUDENTS DON'T GO TO THE FIRST INSTITUTION THEY CONTACT.

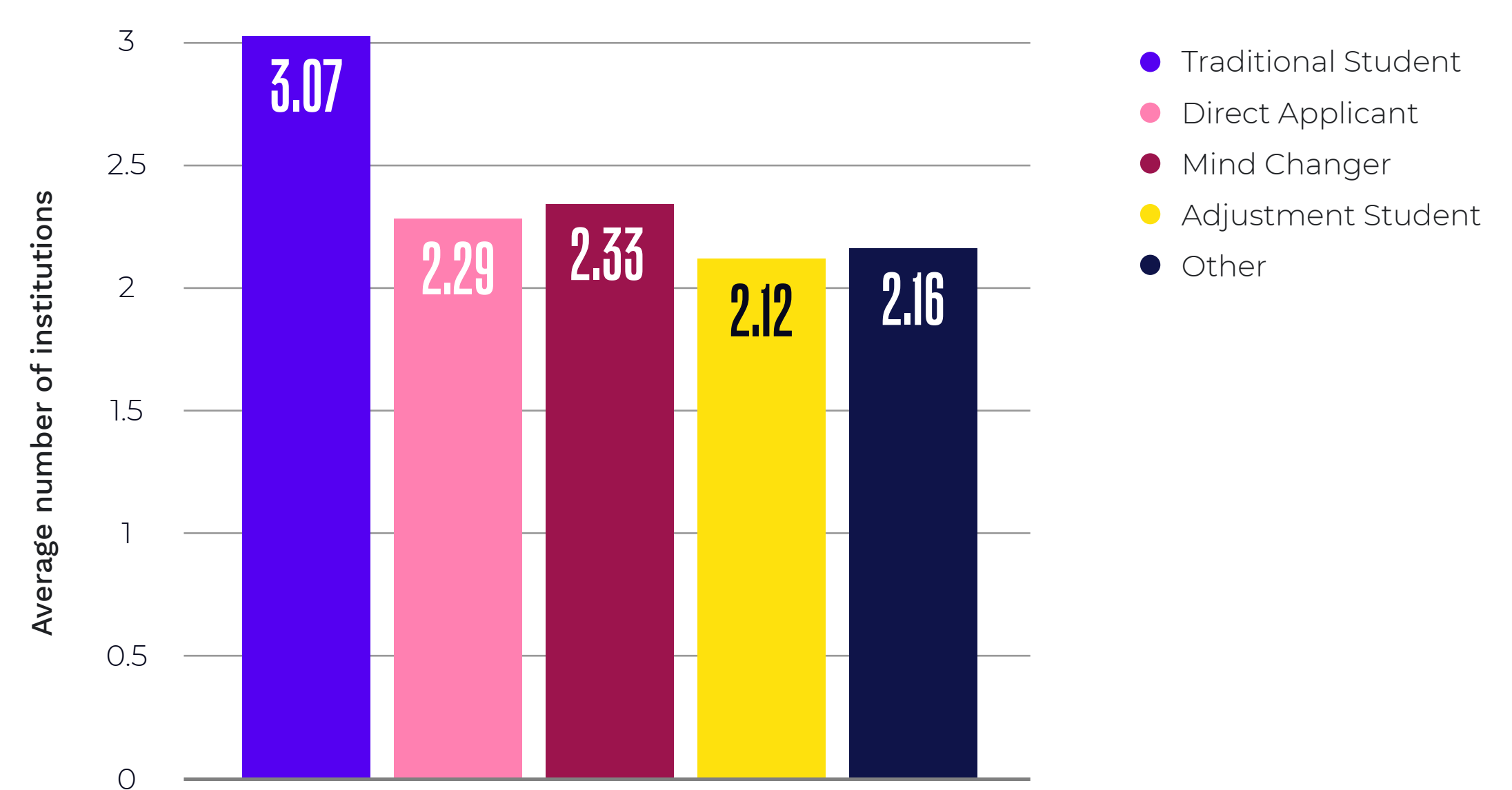
What's more, one in two students don't go to the first institution they contact. Instead they continue their search to ensure they're making the right, informed decision. This means opportunity on the day for institutions.

But you still need to make an impact to be on their list of universities to contact. Traditional Clearing students are contacting fewer institutions (-16.7%) than they were in 2019.

When did students begin their research?



How many institutions did students contact?





**42% OF STUDENTS
RESEARCHED CLEARING
IN 2021, COMPARED TO
ONLY 20% IN 2018.**

So what's going through the minds of students when it comes to deciding who to contact?

Students are no longer waiting for their results to be revealed on Results Day. They're actively going out and searching for their options.

And the top factors for students when deciding which institution to contact in Clearing?

Through a free text answer, students told us availability of the course, being close to home, course content and rankings were the most important factors.

01. AVAILABILITY OF THE COURSE

"Any university that offered my course."

"Googled universities offering Clearing for my chosen course."

02. BEING CLOSE TO HOME

"I wanted to apply to the universities closer to home."

"I wanted to live at home."

03. COURSE CONTENT

"I looked at the modules on the course I was interested in and preferred the modules of the university I applied to the most."

"I contacted the institutions where I liked the course they were offering and I met the entry requirements."

04. RANKINGS

"Anything and everything high on the rankings."

"I had looked at where the university had ranked on the league table for my preferred course."

"I FOCUSED ON INSTITUTIONS LOCATED CLOSE TO ME, WITH GOOD REVIEWS AND THAT, MOST IMPORTANTLY, DID THE COURSE I WAS LOOKING FOR."



"I RESEARCHED AVAILABLE OPTIONS WITH COURSES THAT I BELIEVED I WOULD ENJOY THAT ARE EASILY ACCESSIBLE FROM MY HOME TOWN VIA TRAIN. I ALSO CONSIDERED UNIVERSITY RANKINGS AND EMPLOYABILITY AS WELL AS THE AVAILABLE THEATRE SOCIETIES THE UNIVERSITIES HAD TO OFFER."

02. The radius Clearing students are willing to travel is shrinking.

The distance that Clearing students are willing to travel to university from home has decreased by 12% since 2018. The radius is shrinking.

One in three Clearing students say that 'distance to travel' is becoming a more significant barrier to entry.

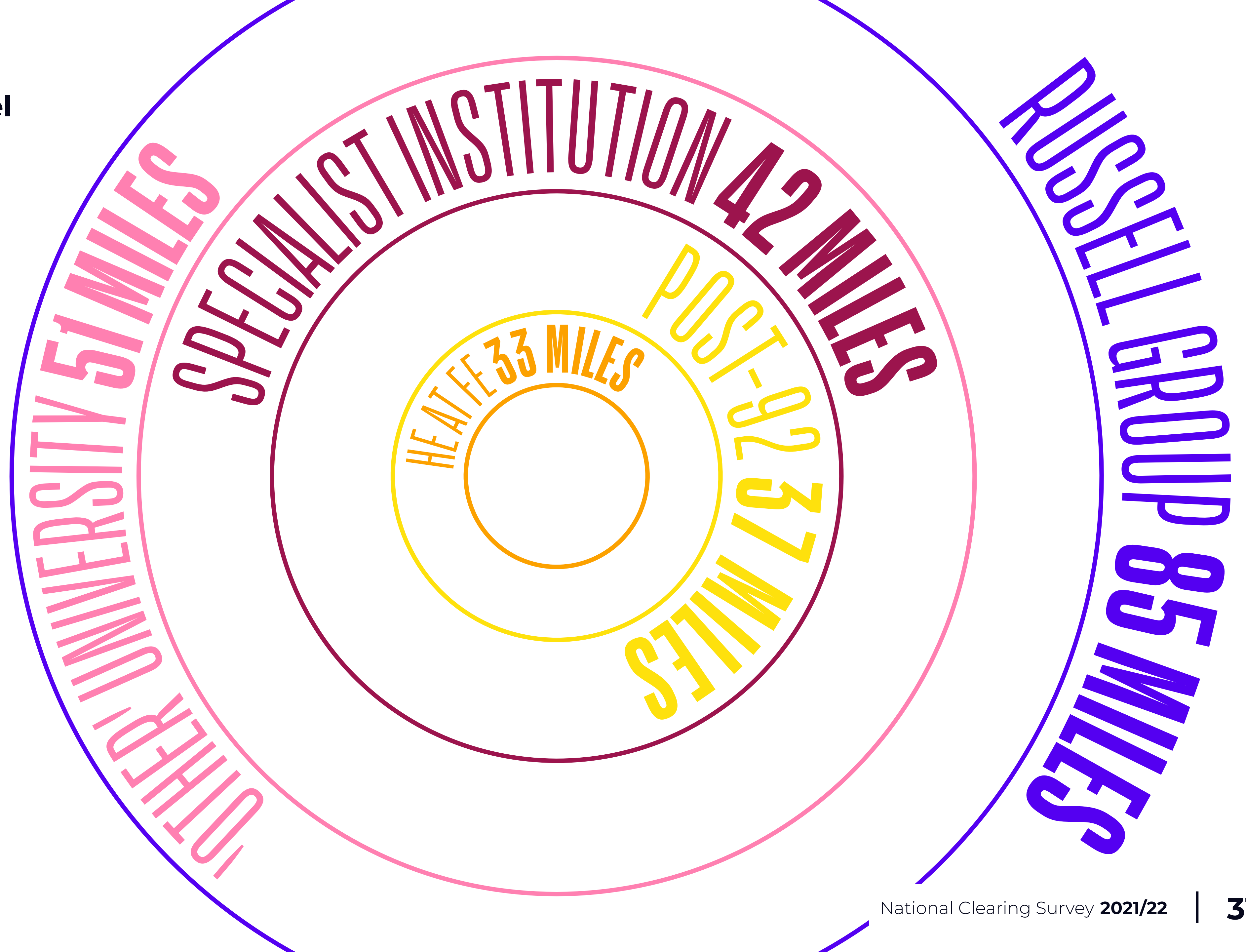
This sentiment was reflected across the board. Location has increased by 10% in terms of importance to Clearing students from 2018 to 2021. And being close to home was the second most important factor when deciding which institutions to contact.

It's increasingly all about recruiting locally.

Understanding who is on your doorstep, what the radius is that you're playing with, and who your neighbourly competitors are.

And perhaps you're thinking, isn't this just an effect of Covid? So we asked if Covid had changed plans. Just 7% said they wanted to stay close due to Covid. Suggesting that this is much more of a permanent trend.

**Commitment to travel
per institution type**



44 MILES VS.

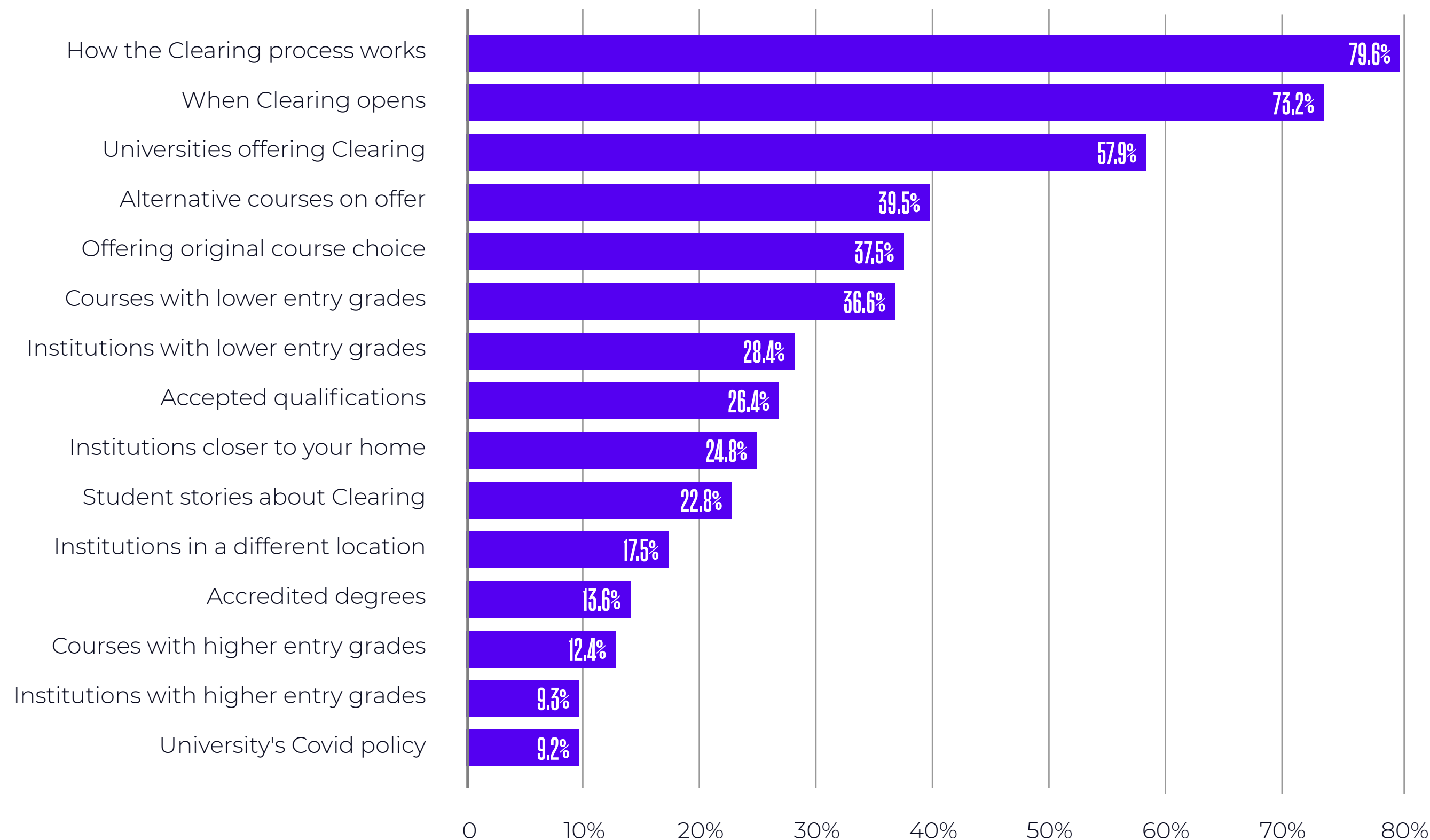
Average distance widening participation students are willing to travel

51 MILES

Average distance *all* students are willing to travel

03. Clearing still remains an enigma to many students.

What information do students look for regarding Clearing prior to Results Day?



Most student marketers have seen more Clearings than you can count on one hand. But for students, Clearing is an unknown and confusing stressor. They're unsure of the process, what options they have and when it's time to start making decisions.

Year on year, we see “*how does the Clearing process work?*” and “*when does Clearing open?*” appearing as the top questions students are asking, with 79.6% and 73.2%, respectively Googling for these answers. This is a trend we see NCS after NCS.

**THE TOP PIECE OF ADVICE
CLEARING STUDENTS WOULD
GIVE FUTURE CLEARING
STUDENTS IS TO START
RESEARCHING BEFORE
RESULTS DAY.**



So it is key to have relevant content on these subjects all year round, as if your institution can provide the answers when students are looking, you may well be the destination they choose later down the line.

Similarly, because of the stress that the Clearing process and Results Day cause, many students are starting their research much earlier to make sure they're prepared when the time comes.

The top three emotions felt by students when looking for a Clearing place are nervous, stressed and anxious. If you can be proactive in your content to try and alleviate these emotions before the Clearing madness kicks off, you could be earning some serious brownie points.

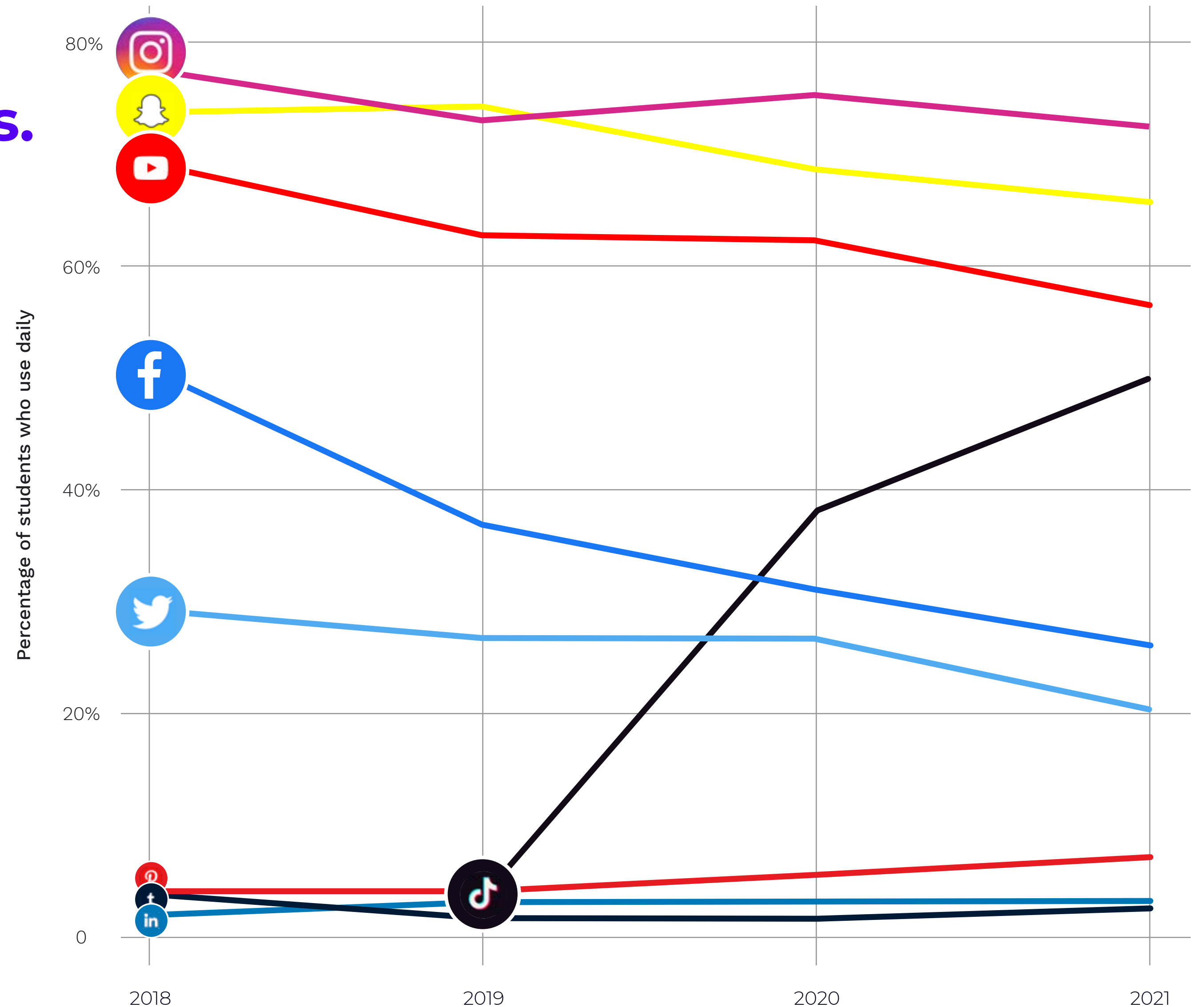
Students' top 10 feelings about Clearing



04. Students continue to use a wide variety of channels.

One in two Clearing students now use Tik Tok on a daily basis. This is up by 47% from 2019.

Meanwhile, Facebook continues its trend of losing relative market share. Interestingly, and perhaps surprisingly, all social media platforms are now seeing a reduction in students logging in daily, with Tik Tok being the notable exception.





But that's not to say students aren't using a variety of channels, they absolutely are. There's very good reason to spread your content across all the relevant platforms for your audience. This is just a reminder to be aware of emerging trends, as something that can be nonexistent one year, can very quickly become 'the thing' the next.

If you want to get started on TikTok, or up your game on this growing platform, download our student marketer's guide.

As we know that students spend their time shuffling between different social platforms, it's critical to understand that what will work on one feed will not necessarily work on another. There's a reason why these platforms coexist alongside one another. They provide and offer different things to their audiences, and you must do the same.

We know from our Student Pulse research that on TikTok, students want to see lighthearted, student-generated content. The kind that gives them a feel for student life or the campus. It's not about the heavily crafted, studio-shot advert that might work on television or Facebook. And this is where your student ambassadors and advocates come in.

Discover what else Student Pulse reveals about media behaviour and preference.



Conclusion

Clearing is no longer a ‘worst case scenario’; it’s an active choice in many students' minds. Which means they’re starting their research earlier, and are eager to know and understand the process.

While Clearing may still be an enigma to many, there’s an opportunity for your institution to be an informative beacon of light at a very confusing time, standing you in good stead come decision day.

Students’ priorities are shifting, namely wanting to be closer to home. Consider the messages you’re sharing

and how you can alleviate specific anxieties. And talking of messages, copying and pasting your content to every platform isn’t going to cut it. Have in mind how students use each individual channel, and the messaging that is appropriate for each one. Tailor your content to fit, making sure it is always-on throughout the year, ready and waiting for your prospective students.



CLEARING IS INCREASINGLY AN ACTIVE CHOICE FOR STUDENTS



THE RADIUS CLEARING STUDENTS ARE WILLING TO TRAVEL IS SHRINKING



CLEARING STILL REMAINS AN ENIGMA TO MANY STUDENTS



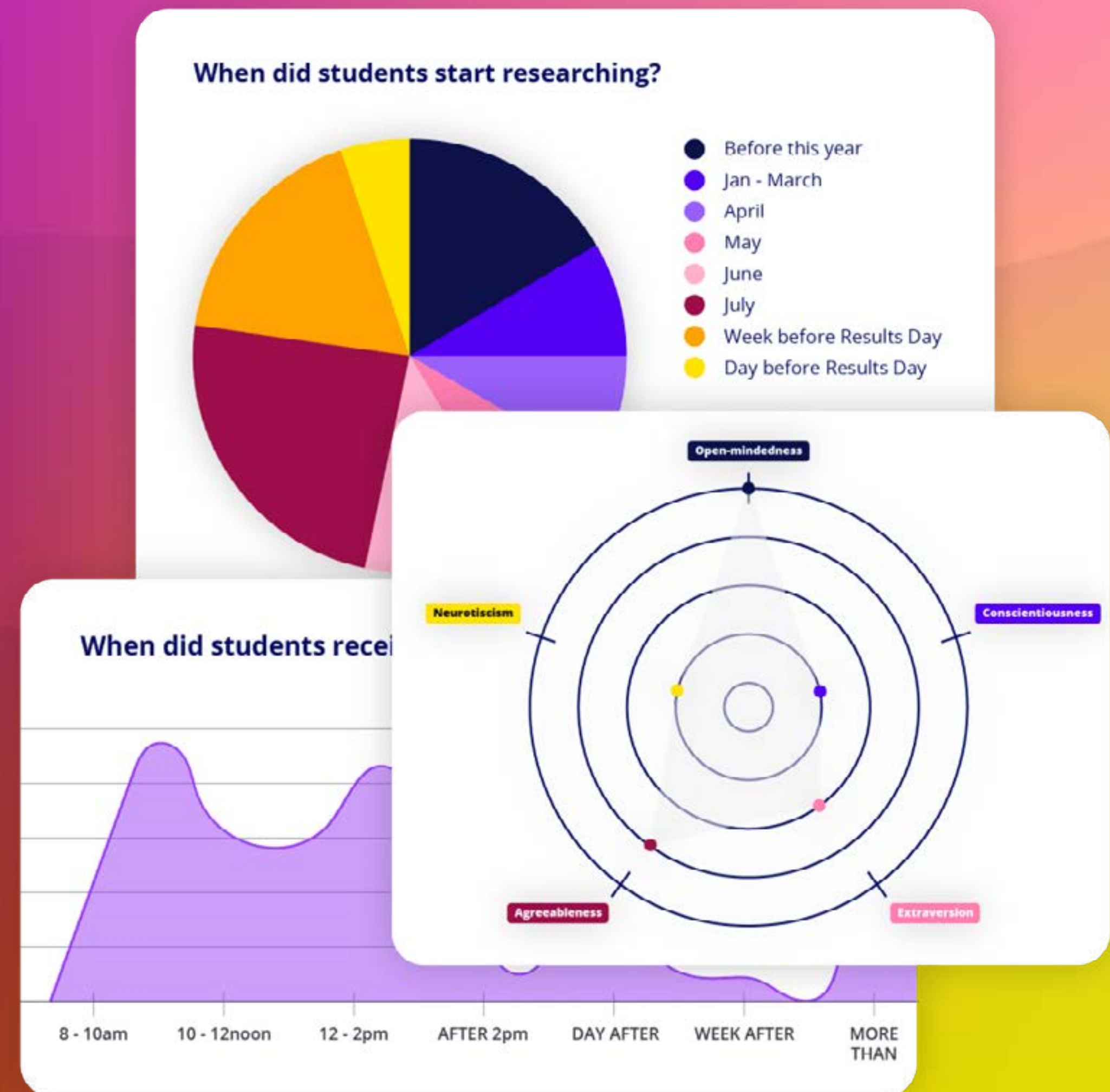
STUDENTS CONTINUE TO USE A WIDE VARIETY OF CHANNELS

FOR MORE INSIGHT ON ALL FOUR OF OUR NCS KEY FINDINGS, YOU CAN HEAD TO THE DASHBOARDS TO DELVE DEEPER AND FIND THOSE ACTIONABLE TAKEAWAYS. HEAD OVER THERE FOR FREE NOW.



TO AKERO

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Take part in the National Clearing Survey 2022/23

To reflect the changing attitudes, methods and technology, the National Clearing Survey will be updated later this year. The Research Division at Net Natives are registering institutions who wish to take part and collaborate in this year's National Clearing Survey. 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 dashboards before general release, giving you a headstart in planning your 2023 Clearing strategies.
- Your own institution's findings, benchmarked against the national average, giving you visibility on how your institution compares and differs.
- The opportunity for your students to win a prize to help with their ongoing studies.

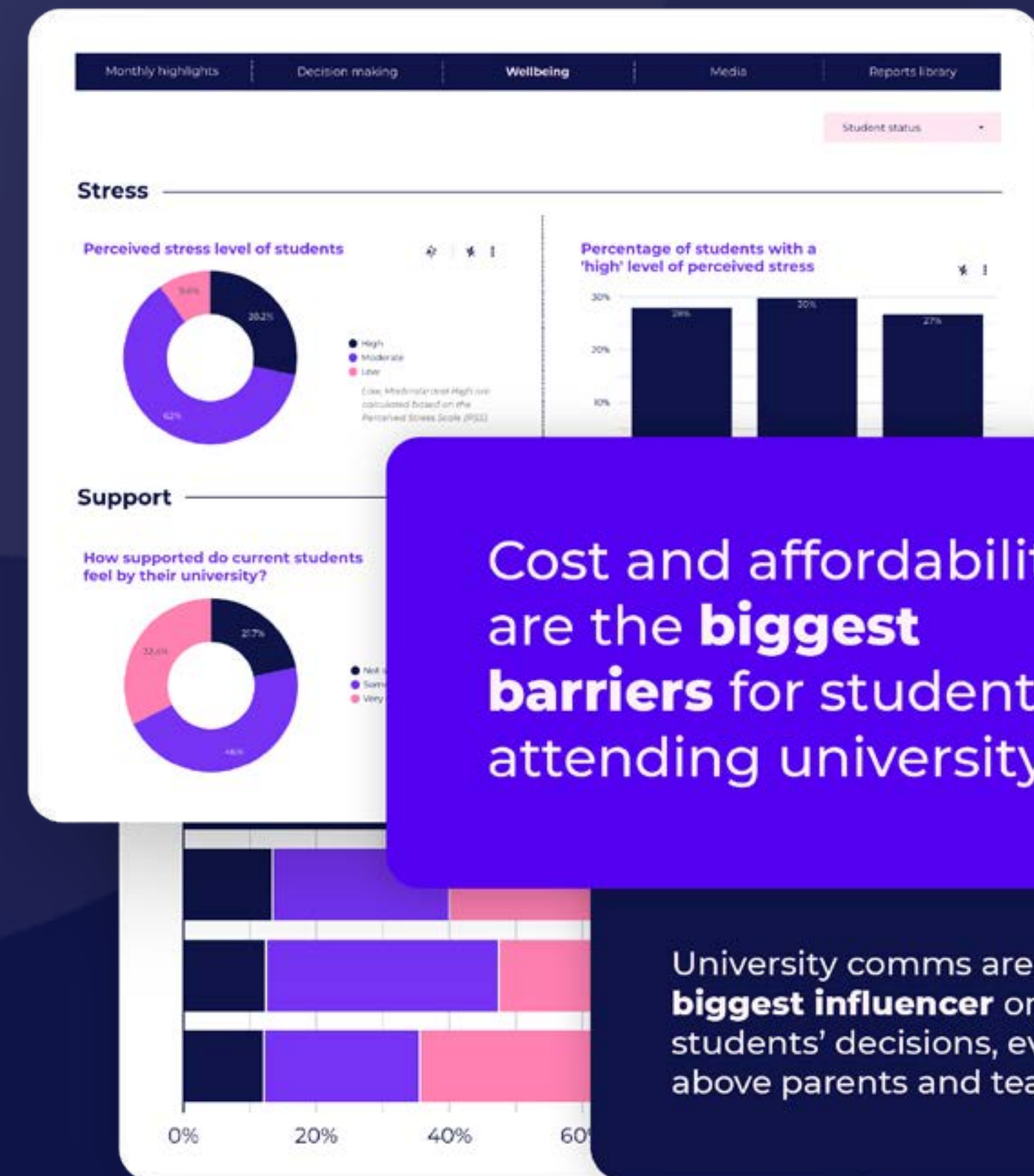
Sign up to take part in next year's survey

Having your institution-specific data as a NCS partner allows you to benchmark against national findings.

Your Akerro Data Labs dashboard will help you:

- Identify which segments you should be targeting
- Uncover where there is potential opportunity to grow market share during Clearing
- Position effectively against these segments
- Engage and support prospective Clearing students, cutting through the noise
- Develop a comprehensive marketing strategy for Clearing based on real data and insight
- Have potential for further deep-dive research

Get your Akerro Data Labs log in now.



Cost and affordability are the **biggest barriers** for students attending university.

University comms are the **biggest influencer** on students' decisions, even above parents and teachers.

Google
Premier Partner

Meta
Business Partner

MRS Evidence
Matters™
Company Partner

CYBER
ESSENTIALS
PLUS

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