

NATIONAL CLEARING SURVEY

2020/21



REPRESENTATIVE. INDEPENDENT. INSIGHTFUL.

Say hello to the
National Clearing Survey.

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A collage of various survey snippets in red and purple tones. Visible text includes: '...HAVE SOME CONCERNS ABOUT WHAT INSTITUTION THEY PICKED.', '3 IN 1 HAVE CONC THE C PICKED', '2 IN 10 CLEARING STUDENTS THINK IT IS LIKELY THAT THEY WILL TRANSFER TO A DIFFERENT COURSE OR INSTITUTION.', '1 IN 10 T LIKELY T DEFER O OUT OF U ALTOGET', '1 IN 4 (26%) WANT TO R USE THESE', 'THE TRADITIONAL CLEARING STUDENT', '40% SAMPLE SIZE', 'MOST LIKELY TO STUDY:', 'SUBJECT COURSE CONTE', 'CAREER PROSPECTS', and 'RES'.

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 sixth 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 one in five Post-92 HEIs, plus public and specialist institutions. The research analysed over 500,000 different data points and includes 3,500+ deep-dive qualitative surveys from students who attend 153 different UK HEIs. The results have been benchmarked against the findings from the previous five years of research to identify short- and long-term trends, resulting in the most insightful National Clearing Survey ever.

The Covid Clearing

The National Clearing Survey was born in 2015 to help marketing and admissions teams inform their strategic planning and support for students during the digital Clearing process. In 2020, insights have become even more important, as data built up over years of running Clearing campaigns became obsolete in the wake of Covid-19, successive government u-turns, and the fiasco over this year's exams and student accommodation. This was a Clearing recruitment cycle like no other.



**NINE IN 10 STUDENTS STILL FELT
SUPPORTED BY THEIR INSTITUTION
AMID UNPRECEDENTED CHANGES TO
THEIR UNIVERSITY EXPERIENCE.**

- Student Hut Covid Tracker survey



At the time of writing, the dust is settling on 2020, and we are starting to see how the global pandemic has impacted student recruitment across the sector. One of the biggest concerns for the education sector has been the impact of Covid-19 on students, especially those from a disadvantaged background or those studying from outside the UK.

Despite horrendous experiences for students throughout 2020, with seven in ten telling us that they were negatively impacted by the pandemic and more than one in three saying that Covid-19 presented a barrier to them studying at university (citing concerns around the quality of the online learning experience, lack of social interaction, financial barriers and their own health), there were green shoots. The resilience and creativity of the education sector to support students and provide access to learning opportunities mean that there are positives to reflect on.

At the end-of-cycle, a record UK 18-year-old application rate (41.5%) and acceptance rate (89.1%), fuelled an overall growth in participation from all five POLAR groups. There was a significant growth in mature student acceptances, reflecting a demand for up- or re-skilling during a recession, while the work of doctors, nurses and health professionals inspired applications to health and health science degrees.

In Clearing, acceptances increased by 7% year-on-year, primarily led by those who applied directly through Clearing in the later stages of the cycle. The pandemic accelerated a general, shallow trend seen in recent years with more students choosing to study closer to home, a trend that was seen across all age groups and not just mature students. And a much feared mass-deferral didn't occur, with a modest 0.3% increase in deferrals compared to 2019/20.





Clearing has traditionally been seen as a route into higher education for students who haven't achieved the grades they needed. Yet increasingly, it is becoming an active choice for applicants to secure their place at university in a way that suits them. This has been further accelerated by the pandemic, as students leave their decisions late in the recruitment cycle, so that they have the very latest information available to them. So, it's no surprise that the behaviours and profile of what makes a 'typical' Clearing student have rapidly evolved over the five years this research has been conducted, this year more than most.

The National Clearing Survey enables decision makers, marketers, recruiters, admissions advisers and senior leaders from the higher education sector to gain a more detailed understanding of students' actions before, during and after A-Level Results Day. The report looks at students' main influences and their motivations when selecting a place.

THIS REPORT OFFERS INSIGHTS, DEFINES TARGET AUDIENCES AND BEHAVIOURAL TRENDS, AND PRESENTS A TIMELINE WITH KEY DATES. IT EQUIPS YOU WITH THE INFORMATION YOU NEED TO TARGET PROSPECTIVE STUDENTS THROUGH THE **RIGHT CHANNELS, AT THE RIGHT TIME AND WITH THE RIGHT MESSAGE.** AND IT ALLOWS YOU TO MOVE BEYOND ASSUMPTIONS ABOUT CLEARING AND FOCUS ON DATA-DRIVEN INSIGHTS, TO HELP WITH LONG-TERM PLANNING AND MARKETING DECISIONS THAT WILL GIVE YOU THE EDGE.



Methodology

The National Clearing Survey 2020/21 was open to all students who applied to university through Clearing for the 2020/21 academic year.

Every HEI in the UK was invited to collaborate on the survey by the Research Division at Net Natives, the student specialist marketing group. In total, we analysed over 500,000 pieces of data and conducted over 3,556 deep-dive qualitative surveys, with students participating from 153 different UK institutions. In total, 38 institutions partnered in this year's survey.

The survey was open from 13 August 2020 until midnight on 22 November 2020.

Equal weighting was given to each participant's response.

3.500+ DEEP-DIVE SURVEYS

500,000+
DATA POINTS
ANALYSED

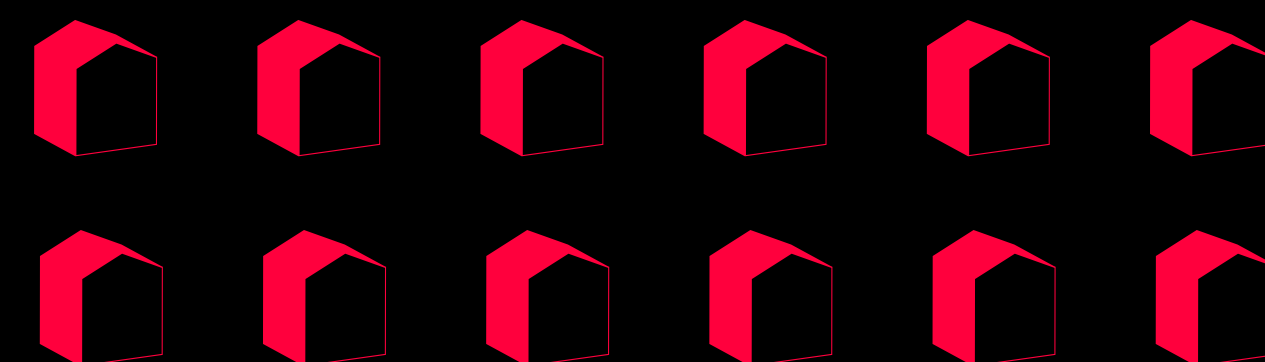
308 PARTNERING
INSTITUTIONS

3 1 IN 3
RUSSELL
GROUP

1 IN 5 POST-92

92

STUDENTS GOING TO
153 INSTITUTIONS



Key findings at a glance

01.

Online learning quality is one of the most important factors for Clearing students. One in four students rate it as the most important when choosing where to study.

02.

‘Mental health’ and ‘confidence’ are two of the biggest barriers for students wanting to go to university.

03.

Students continue to use a huge variety of social media daily, but Facebook continues its trend of losing relative market share. More than one in three students are using TikTok daily.

04.

Students want universities to move towards more modern tools and communication channels.

05.

The majority of Clearing students felt unsure about at least one aspect of their university choice.

06.

Applying through UCAS as a Direct Applicant continues a long-term trend of being an active choice. Direct Applicants continue to increase their market share.



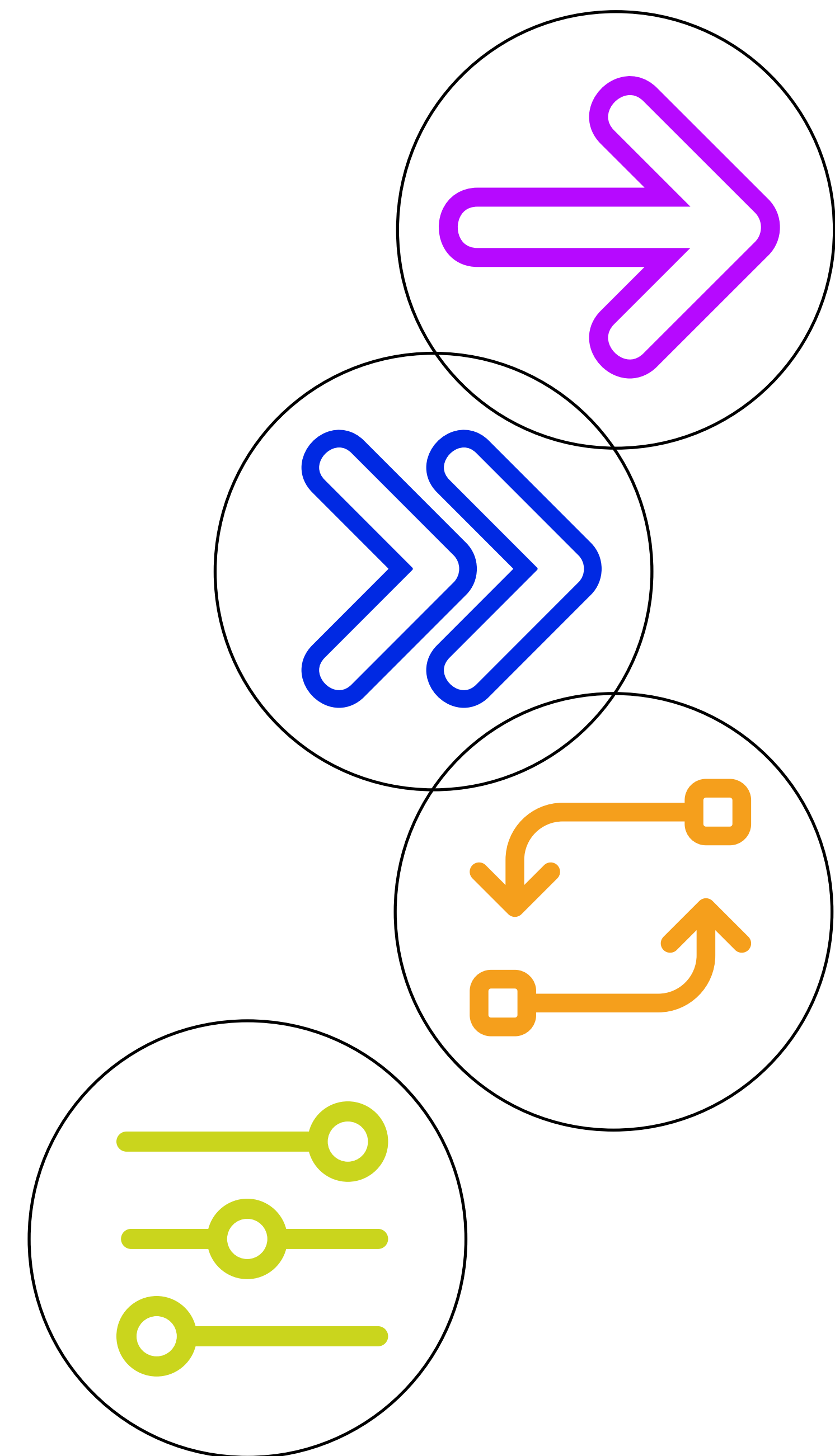
SECTION 01:

The four Clearing profiles

Section 1: The four Clearing profiles

Since its launch six 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: Traditional, Adjustment, Mind Changer and Direct Applicant. They're all still with us after six 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.

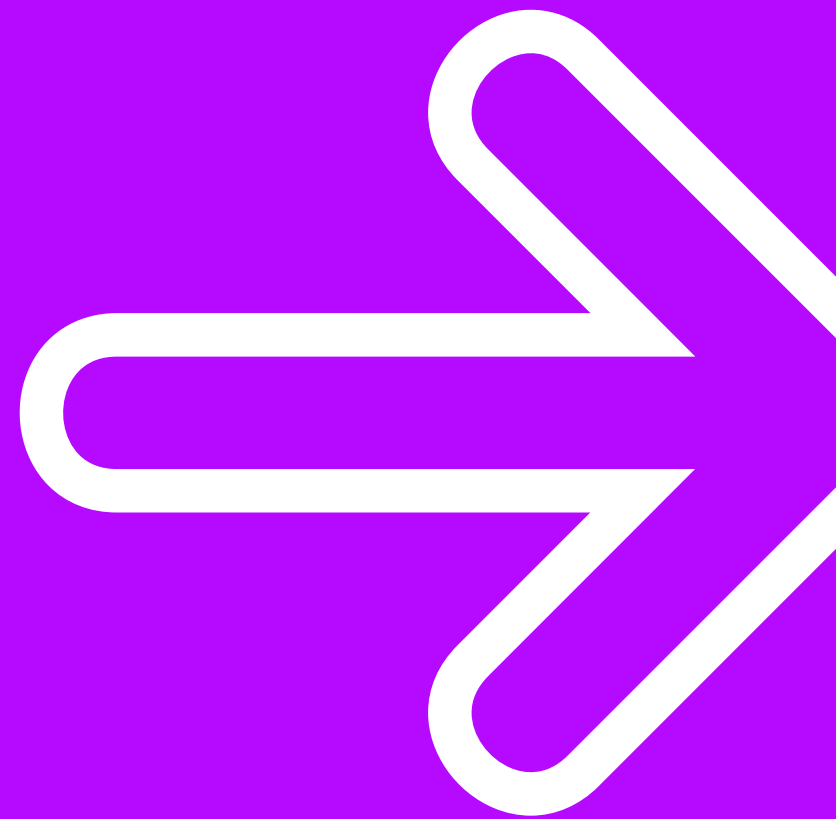
This year we were interested to find out if a new segment might emerge - perhaps a one-off Covid segment, those only going to university because of the pandemic - but we found that this was not the case. Although there is not a distinct Covid segment, all segments were in some way affected by the pandemic, and this is detailed in their profiles.





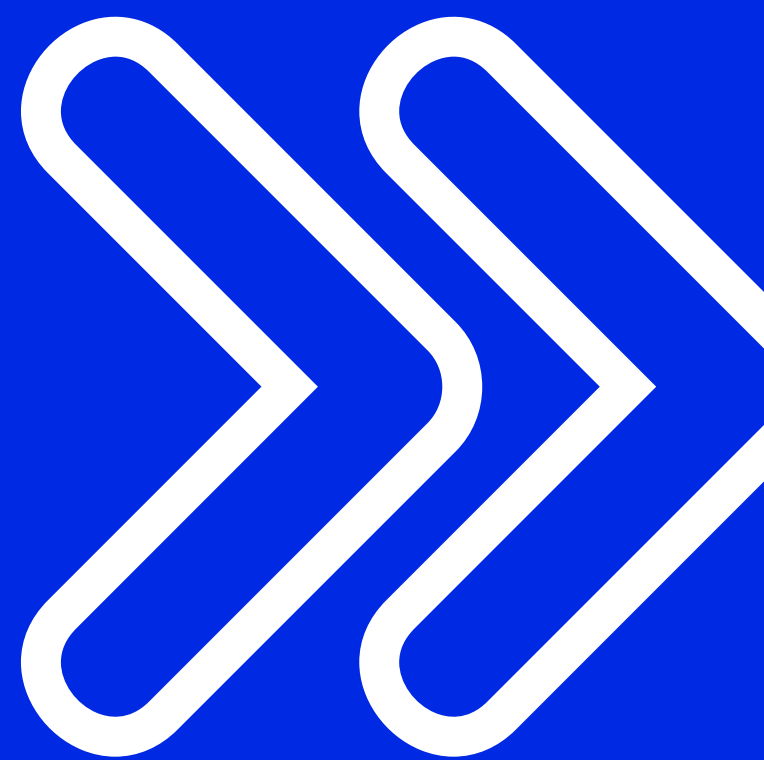
Each segment has been developed using data from our survey responses, and their identities have been measured and presented using demographics, education, destination, motivation, influencers and their top social platforms used daily. This year, we have added more information to each persona, and over 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 2020. It illustrates the opportunities for smart targeting within an institution’s strategy that might not have been previously understood or considered.



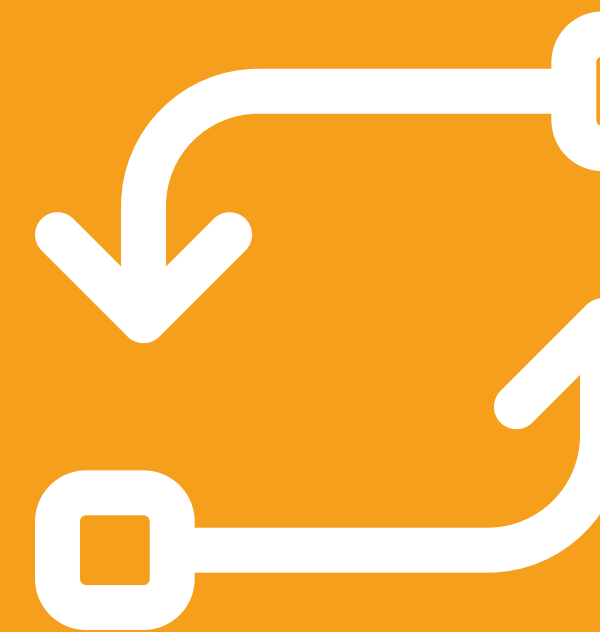
THE TRADITIONAL CLEARING STUDENT

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.



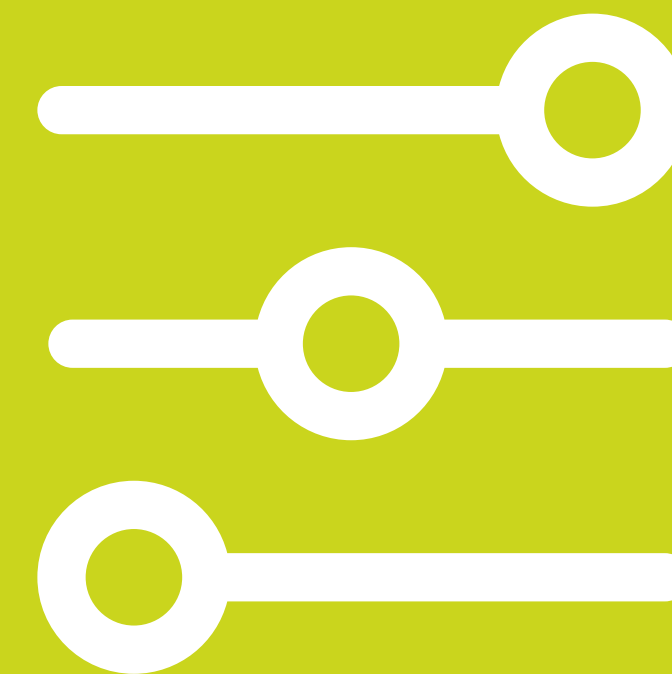
THE DIRECT APPLICANT

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

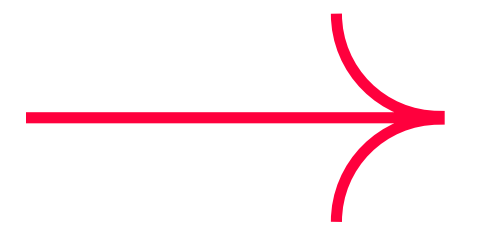
The Adjustment Student has entered Clearing because they received better grades than expected, and they're looking for an institution with higher grade boundaries.

Think Student

Segmentation is marketing strategy 101, but every year we see institutions making the same mistakes. They run large brand campaigns but fail to adapt their marketing to each segment based on their unique behaviours, barriers and desires.

It's important to make sure your campaigns, messaging and nurture strategies are aligned to each market you are targeting and that you provide a true omnichannel experience. For example, most institutions will identify the Direct Applicant as an opportunity to increase their market share. The persona presented here has some outliers;

they are typically three years older, more likely to return to education later, decide late, study closer to home and use different media channels. As an institution, you will want to understand how to best reach this audience on the platforms they are using, with comms that support their unique needs.



Presented here are the national findings; a great starting point. But understanding your own target audience and segments, where you already have a strong market share and where the opportunities are, will unlock your winning strategy for 2021.

If you are a partner with the National Clearing Survey, then you already have your own data to benchmark against the national findings of this report. However, if you are not and you want an insight-driven approach to your 2021 Clearing strategy, then it's not too late to run research now to understand your target market, and sign up to take part in the 2021/22 survey.



THE TRADITIONAL CLEARING STUDENT

40%
SAMPLE SIZE

AVERAGE AGE
19
AVERAGE AGE

GENDER:

63% 36%
FEMALE MALE

TYPE OF INSTITUTION:

36%

OTHER

32%

RUSSELL GROUP

MOST LIKELY TO STUDY:

BIOLOGICAL
SCIENCES

HUMANITIES

SOCIAL
SCIENCES

1 2 0
AVG. UCAS POINTS

MOTIVATOR ⚡

SUBJECT

COURSE CONTENT

CAREER PROSPECTS

BARRIERS:

COST OF LIVING

ENTRY REQ.

COVID-19

THE TRADITIONAL CLEARING STUDENT

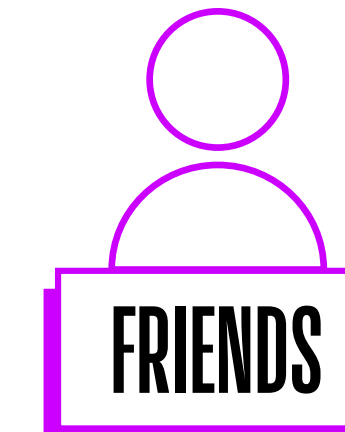
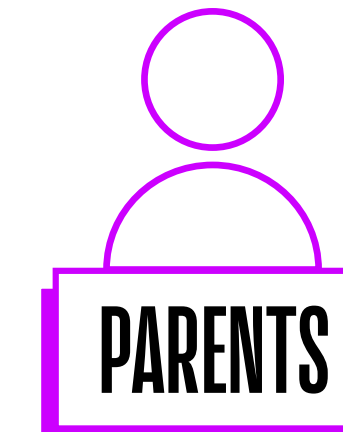
1ST-GEN:

47%

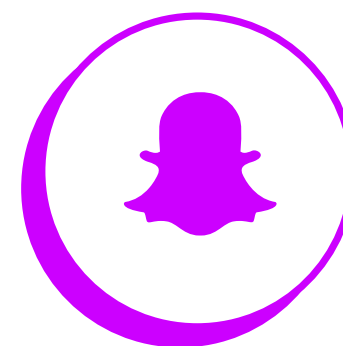
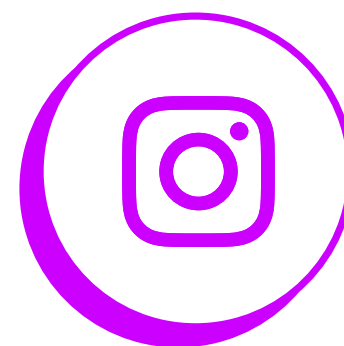
BEHAVIOUR:

EARLY
RESEARCHER

INFLUENCES:



TOP
SOCIAL
MEDIA:



TOP
TRADITIONAL
MEDIA:

TV ON DEMAND

NEWSPAPERS

LIVE TV

EMOTIONS:

RECEIVED
RESULTS

SAD
DISAPPOINTED
ANGRY

LOOKING
FOR A PLACE

STRESSED
ANXIOUS
NERVOUS

RECEIVED A
PLACE

RELIEVED
HAPPY
EXCITED

COVID IMPACT:

73%

THE DIRECT APPLICANT

35%
SAMPLE SIZE

AVERAGE AGE
22.5
AVERAGE AGE

GENDER:

61% 38%
FEMALE MALE

TYPE OF INSTITUTION:

46%

POST-92

36%

OTHER

MOST LIKELY TO STUDY:

SUBJECTS
ALLIED TO
MEDICINE

SOCIAL
SCIENCES

BUSINESS
AND
ACCOUNTING

1 2 0
AVG. UCAS POINTS

MOTIVATOR ⚡

SUBJECT COURSE CONTENT
CAREER PROSPECTS

BARRIERS:

COST OF LIVING

COST OF TUITION

COVID-19

THE DIRECT APPLICANT

1ST-GEN:

57%

BEHAVIOUR:

NO RESEARCH

INFLUENCES:

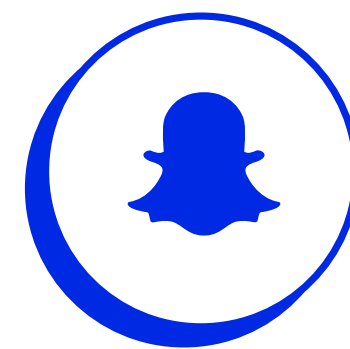
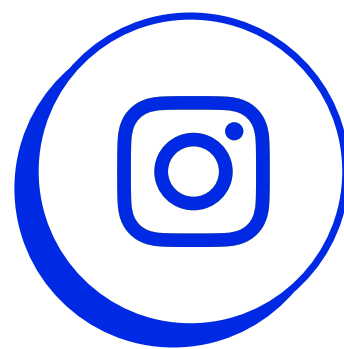
PARENTS

FRIENDS

SIBLINGS

TOP SOCIAL MEDIA:

(Lowest user overall)



TOP TRADITIONAL MEDIA:

TV ON DEMAND

NEWSPAPERS

LIVE TV

EMOTIONS:

RECEIVED RESULTS

HAPPY
EXCITED
NERVOUS

LOOKING FOR A PLACE

NERVOUS
ANXIOUS
STRESSED

RECEIVED A PLACE

HAPPY
RELIEVED
EXCITED

COVID IMPACT:

68%

THE MIND CHANGER

22%
SAMPLE SIZE

AVERAGE AGE
19.6
AVERAGE AGE

GENDER:

68% 31%
FEMALE MALE

TYPE OF INSTITUTION:

38%

POST-92

38%

OTHER

MOST LIKELY TO STUDY:

SOCIAL
SCIENCES

SUBJECTS
ALLIED TO
MEDICINE

HUMANITIES

1 2 3
AVG. UCAS POINTS

MOTIVATORS

SUBJECT

COURSE CONTENT

CAREER PROSPECTS

BARRIERS:

COST OF LIVING

COVID-19

MENTAL HEALTH

THE MIND CHANGER

1ST-GEN:

52%

BEHAVIOUR:

EARLY RESEARCHER

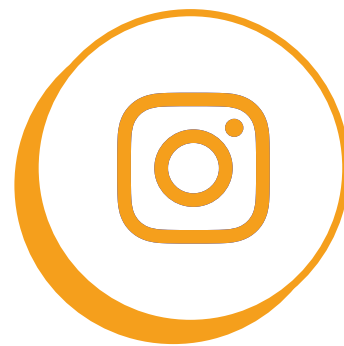
INFLUENCES:

PARENTS

FRIENDS

SIBLINGS

TOP SOCIAL MEDIA:



TOP TRADITIONAL MEDIA:

TV ON DEMAND

LIVE TV

NEWSPAPERS

EMOTIONS:

RECEIVED RESULTS

HAPPY
EXCITED
RELIEVED

LOOKING FOR A PLACE

NERVOUS
STRESSED
ANXIOUS

RECEIVED A PLACE

HAPPY
RELIEVED
EXCITED

COVID IMPACT:

69%

THE ADJUSTMENT STUDENT

3%
SAMPLE SIZE

AVERAGE AGE
19.3
AVERAGE AGE

GENDER:

66% 31%
FEMALE MALE

TYPE OF INSTITUTION:

46%

RUSSELL GROUP

34%

OTHER

MOST LIKELY TO STUDY:

BUSINESS
AND
ACCOUNTING

MATHEMATICS

SUBJECTS
ALLIED TO
MEDICINE

1 3 3
AVG. UCAS POINTS

MOTIVATORS ⚡

SUBJECT

COURSE CONTENT

CAREER PROSPECTS

BARRIERS:

COVID-19

COST OF LIVING

MENTAL HEALTH

THE ADJUSTMENT STUDENT

1ST-GEN:

50%

BEHAVIOUR:

EARLY RESEARCHER

INFLUENCES:

PARENTS

TEACHERS

SIBLINGS

TOP SOCIAL MEDIA:



TOP TRADITIONAL MEDIA:

TV ON DEMAND

NEWSPAPERS

LIVE TV

EMOTIONS:

RECEIVED RESULTS

HAPPY
EXCITED
RELIEVED

LOOKING FOR A PLACE

NERVOUS
STRESSED
ANXIOUS

RECEIVED A PLACE

HAPPY
RELIEVED
EXCITED

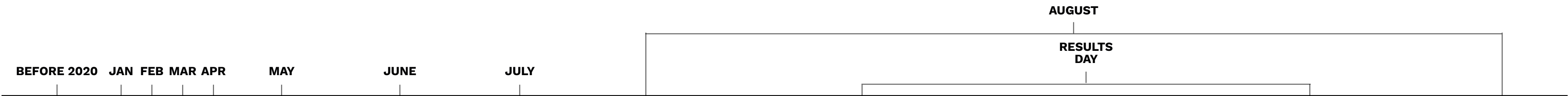
COVID IMPACT:

69%



SECTION 02:

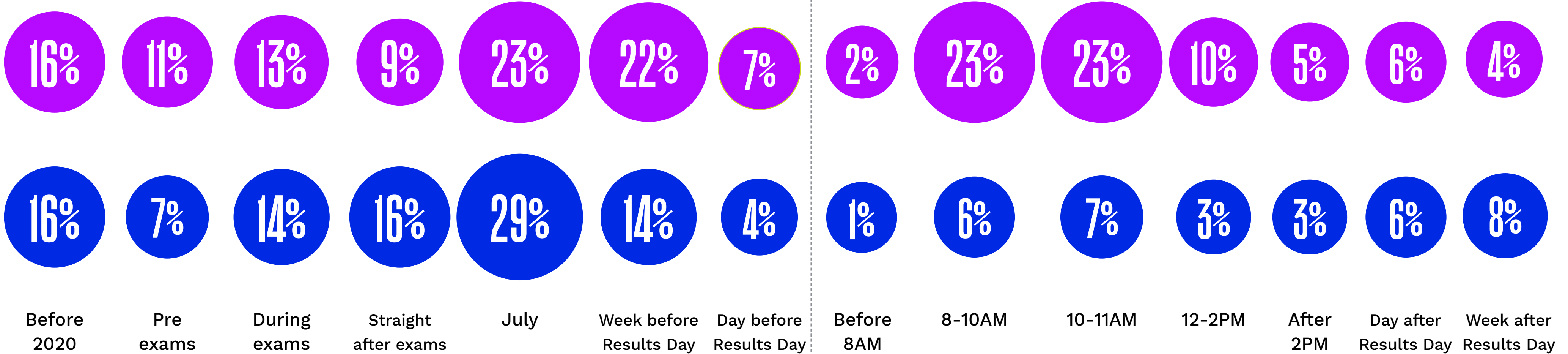
The Clearing timeline



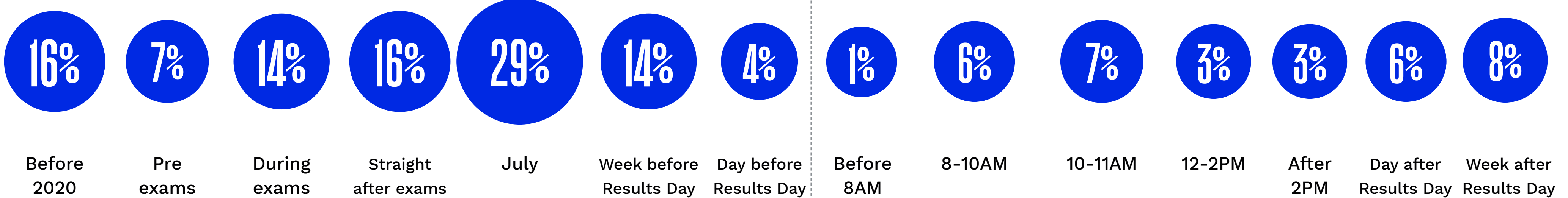
STARTED RESEARCH

LOOKING FOR A PLACE

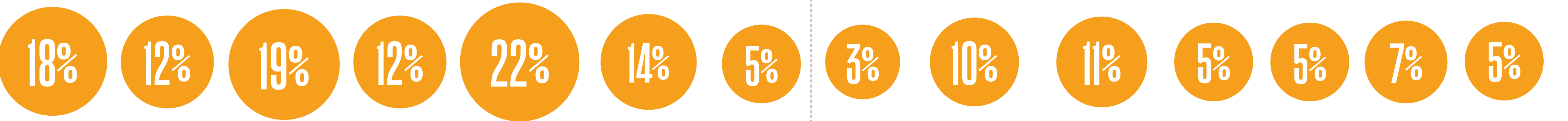
THE TRADITIONAL
CLEARING STUDENT



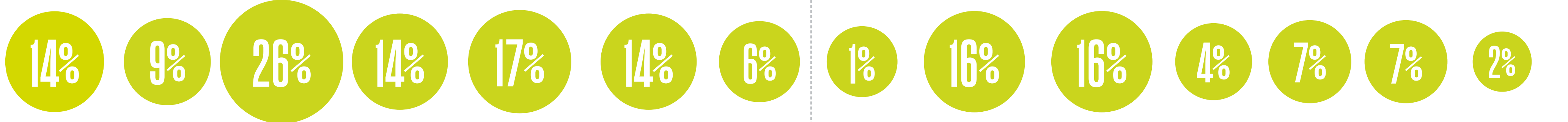
THE DIRECT
APPLICANT



THE MIND
CHANGER



THE ADJUSTMENT
STUDENT



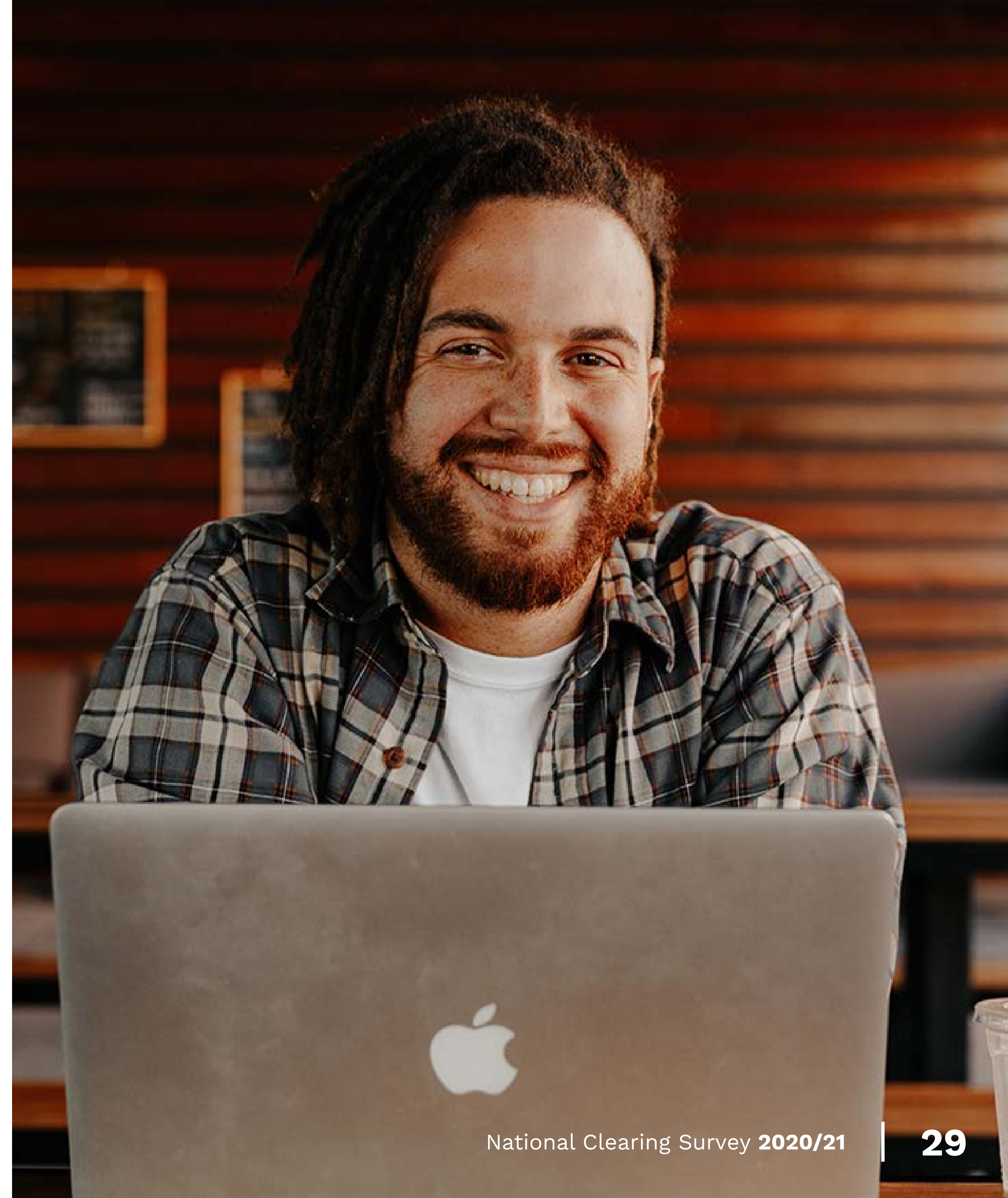
A man with a beard and a grey beanie is looking at a book in a library. The background is filled with bookshelves. The image has a red overlay and a white border with notched corners.

SECTION 03:

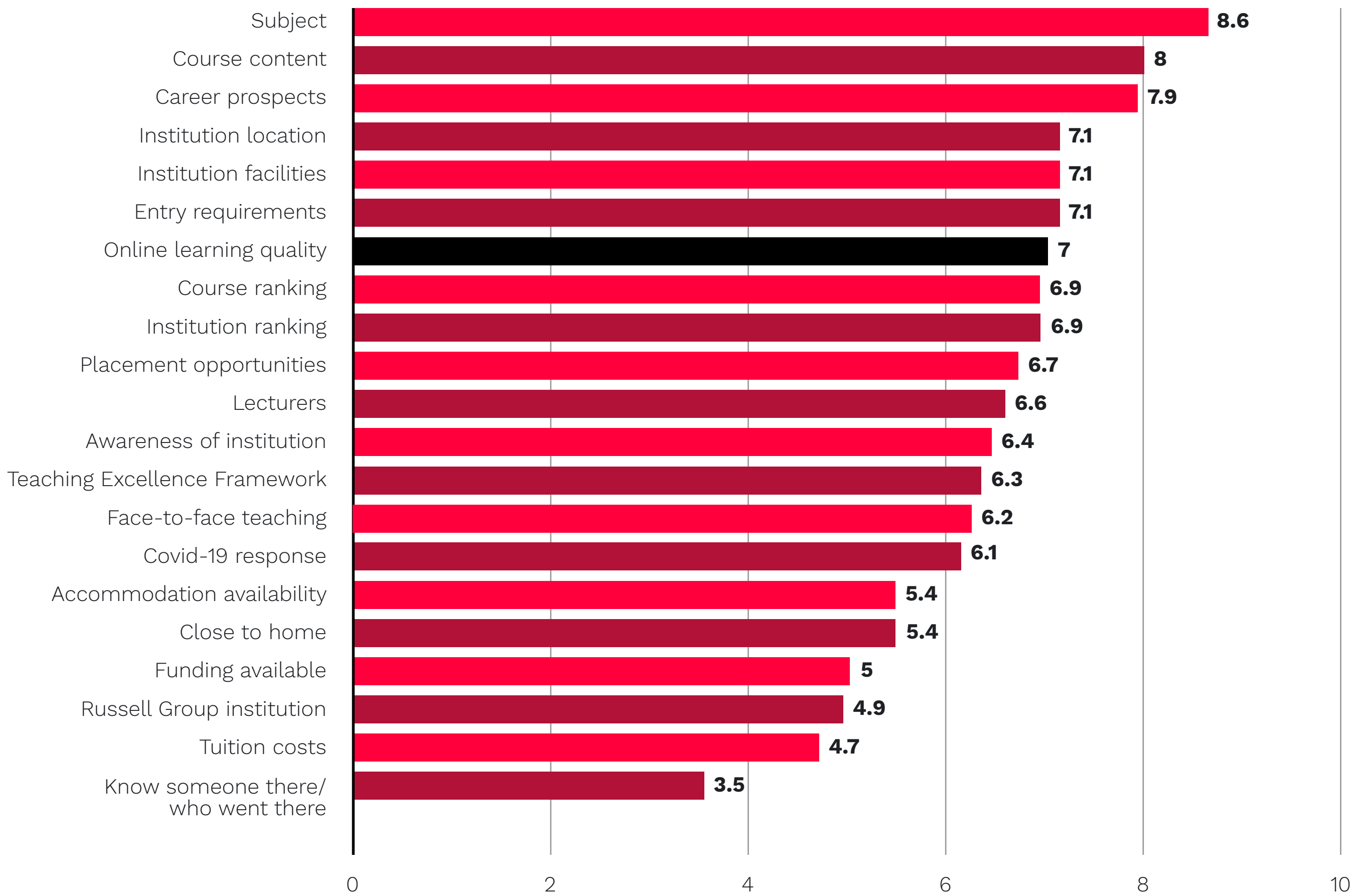
Key findings

1. Online learning quality is one of the most important factors for Clearing students. One in four students rate it as the most important when choosing where to study.

In response to the global pandemic and the rapid acceleration of online learning, we wanted to find out more about how important it was to students when choosing where to study.



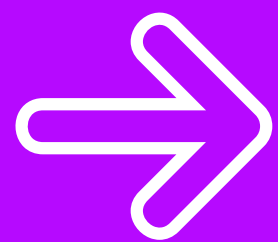
What are the most important factors when choosing where to study?



The top factors for all segments are still, broadly speaking, the same and haven't changed over time. The top six factors contributing to Clearing choice are: subject, course content, career prospects, institution location, institution facilities, and entry requirements. However, online learning quality is now one of the top considerations for Clearing students, trumping 14 other factors such as rankings, accommodation and costs.

One in four students rated 'online learning quality' as 10/10 when choosing where to study in Clearing.

THE TRADITIONAL
CLEARING STUDENT



Subject

Course content

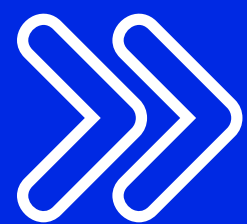
Career prospects

**Online learning quality/
Entry requirements**

Institution ranking

Course ranking

THE DIRECT
APPLICANT



Subject

Course content

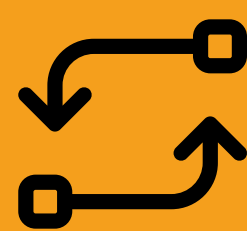
Career prospects

Institution location

Institution facilities

**Online learning quality
/Entry requirements**

THE MIND
CHANGER



Subject

Course content

Career prospects

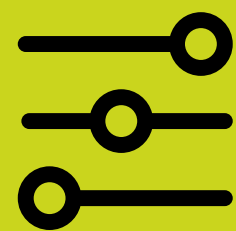
Institution location

Institution facilities

Institution ranking

Online learning quality

THE ADJUSTMENT
STUDENT



Subject

Course content

Career prospects

Course ranking

Institution facilities

**Online learning quality/
Entry requirements**

When we break this down for the different segments, we note that it is especially important for the Traditional Clearing Student, where online learning quality is the most important factor after subject, course content and career prospects - joint with entry requirements. But as you can see, online learning quality appears in the top seven for all groups.

We also asked students a free text question around their concerns about going to university during the ongoing pandemic. Through this we were able to see that those students who mentioned online learning (36%) were concerned about four key areas. Students felt that online learning could mean that:

- The quality of teaching will be poorer
- A lack of contact time will impact their learning
- It will be harder for them to concentrate
- And harder to understand the content of their course

To the right are some examples of the types of responses we received.

1. QUALITY OF TEACHING WILL BE POORER.

"Not having the same quality of teaching online as in person."

"Not getting as good an education as I would face-to-face."

2. A LACK OF CONTACT TIME IMPACTING ON LEARNING.

"Struggling with work and not being able to get that one-to-one face-to-face help from lecturers and tutors."

"Lack of contact time to get ready for placements."

3. HARDER TO CONCENTRATE.

"Unable to focus on work due to being in a home environment, i.e. cannot work in library... cannot study with other students."

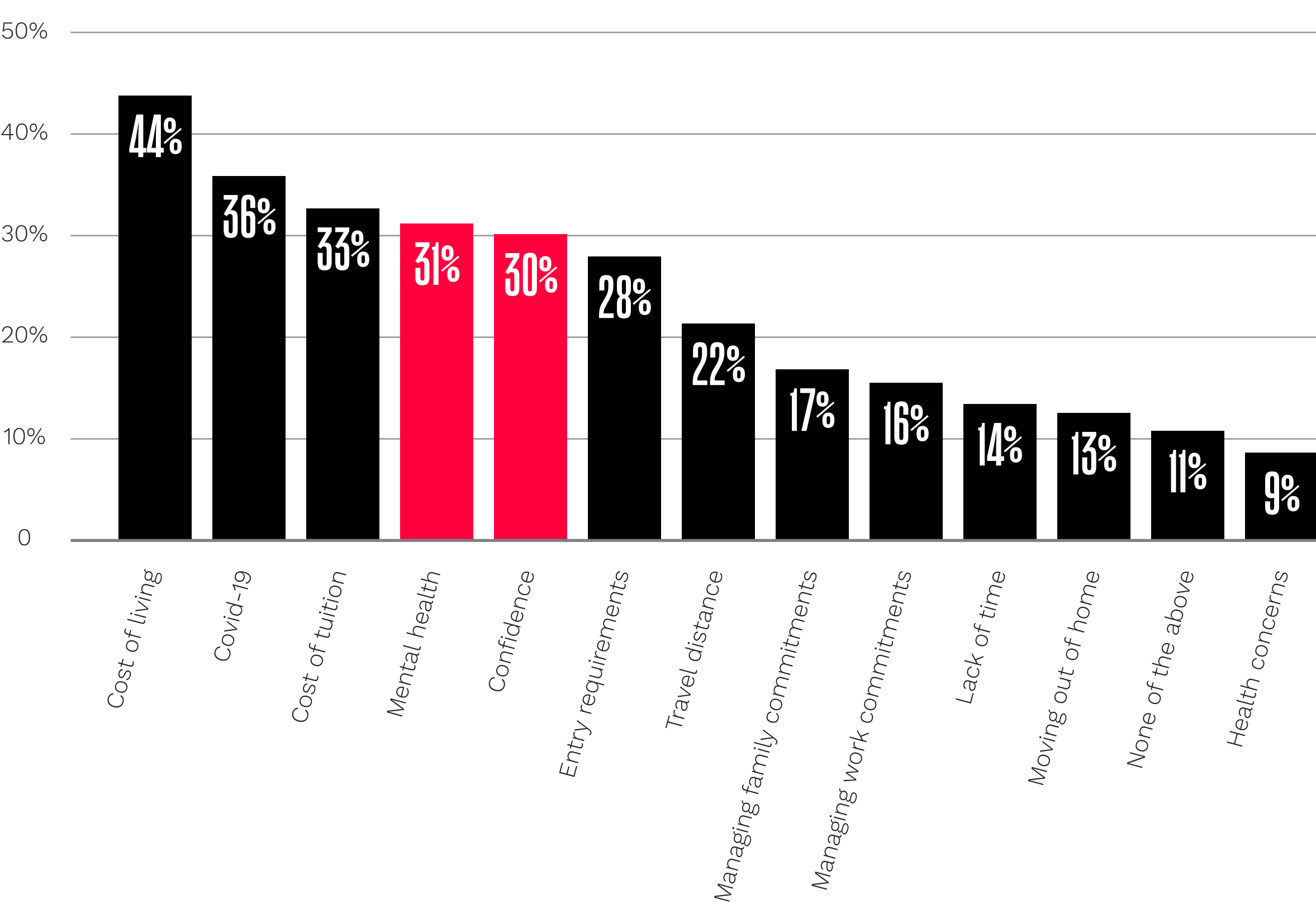
"I find it hard to focus at home."

4. HARDER TO UNDERSTAND THE COURSE CONTENT.

"Online teaching is a worry because although it's still good nothing will beat being there in person because you can ask more questions and get a better understanding whilst in the room."

2. Mental health and confidence are two of the biggest barriers for students wanting to go to university.

What are the biggest barriers when going to university?



Our next key finding is an upsetting one, but perhaps one that will be familiar to a lot of us as we enter 2021. This year we found that a number of Clearing students reported ‘mental health’ (31%) or ‘confidence’ (30%) as two of the key barriers to going to university, both much more prevalent than we found in the data from last year.



THE TRADITIONAL CLEARING STUDENT

Cost of living

Entry requirements

Covid-19

Mental health

Cost of tuitions

Confidence

Distance to travel



THE DIRECT APPLICANT

Cost of living

Cost of tuition

Covid-19

Mental health

Confidence

Entry requirements

Distance to travel/
Managing family
commitments



THE MIND CHANGER

Cost of living

Covid-19

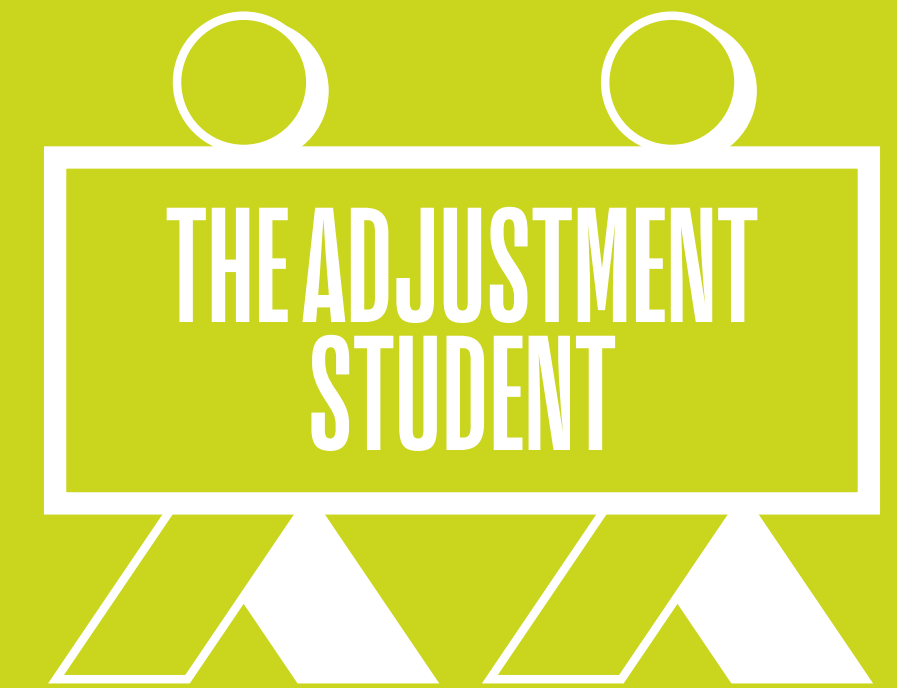
Mental health

Cost of tuition

Confidence

Distance to travel

Entry requirements



THE ADJUSTMENT STUDENT

Cost of living /
Covid-19

Mental health

Confidence

Cost of tuition

Entry requirements/
Distance to travel

Students' top 10 feelings about Clearing

When we look across the emotions that students felt during key times in the Clearing process, we can easily understand how Clearing might be difficult for them.

Students felt a mix of emotions when they received their grades, with some segments more positive than others. However some of the main emotions were those of feeling disappointed, sad and stressed when they first received their results:

	BEFORE CLEARING	DURING CLEARING	AFTER CLEARING
1	Disappointed	Stressed	Excited
2	Sad	Anxious	Relieved
3	Stressed	Worried	Happy
4	Nervous	Nervous	Relaxed
5	Happy	Unsure	Unsure
6	Worried	Hopeful	Uncertain
7	Excited	Excited	Scared
8	Confused	Sad	Proud
9	Relieved	Impatient	Good
10	Angry	Depressed	Tired

Key:

Positive

Negative

**ONE IN THREE STUDENTS MIGHT WANT TO
ACCESS THEIR UNIVERSITY'S MENTAL HEALTH
SERVICES, BUT OVER 50% EITHER CAN'T OR
DON'T KNOW IF THEY CAN ACCESS THEM.**

(Student Hut Covid Tracker survey)

Think Student

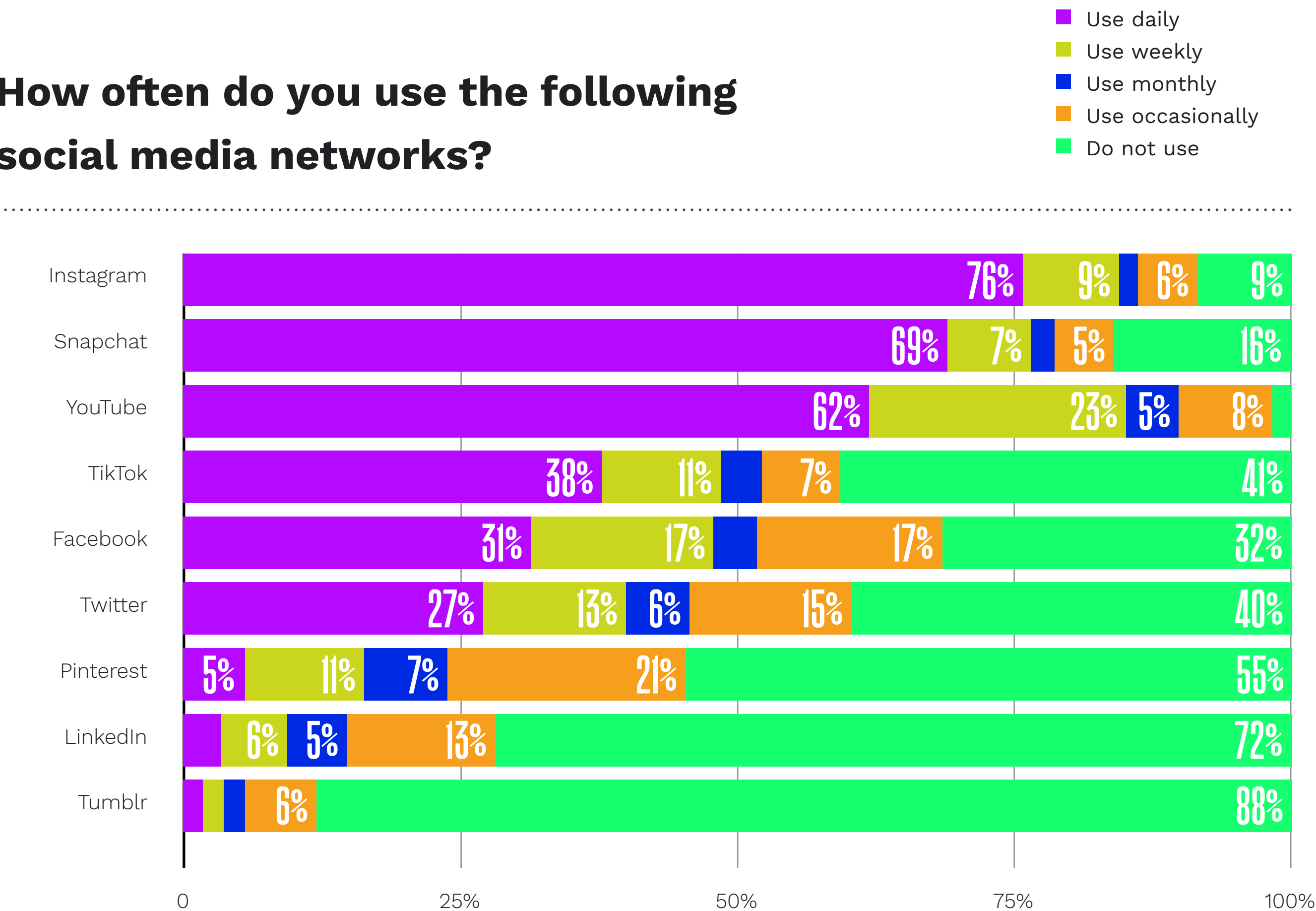
With a looming mental health crisis hanging over young people, exacerbated and accelerated by the pandemic, universities have a huge role to play in providing support services and making sure that students are aware of how they can be accessed, both before they arrive and when they arrive on campus.

It has never been more important to make your communications through the recruitment process empathetic and supportive, reflecting all the additional challenges and changes that Covid-19 has had on young people and society.

Marketing and Admissions departments could run confidence workshops in partnership with their Outreach teams, as an innovative way to support students and build resilience ahead of the Clearing process, associating your institution with a positive experience early on in their decision making process.

3. Students continue to use a huge variety of social media daily, but Facebook continues to lose relative market share.

How often do you use the following social media networks?



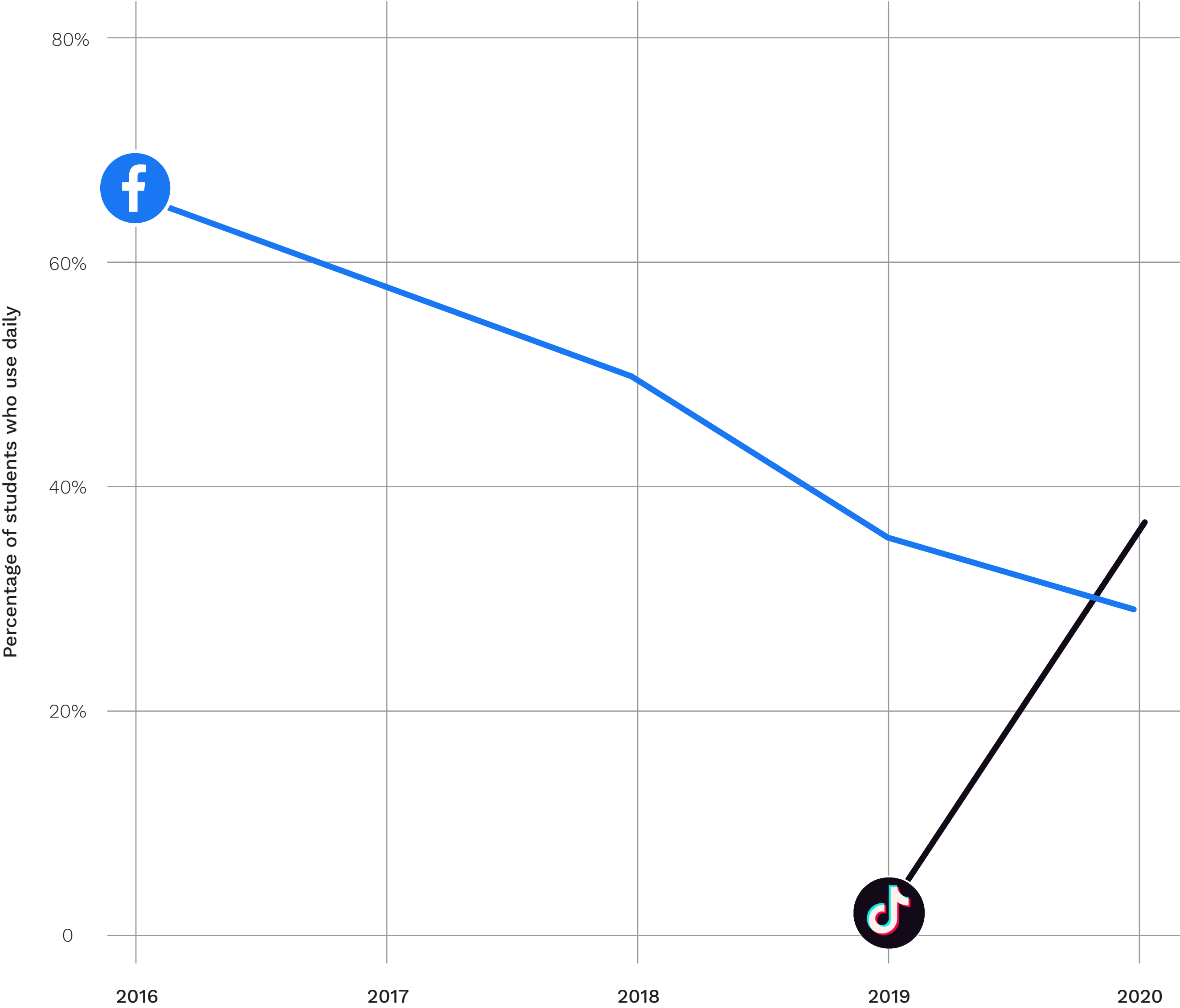
The way students use social media, and the apps they consume content on, continue to shift at a rapid pace, with Covid-19 accelerating the change in how students consume media online.

In contrast, 38% of students are now using TikTok daily, compared to 3.4% last year, a growth of 1167% from last year. When we look at all platforms and their usage on a daily basis compared to growth over time, we see the same top three platforms being used on a daily basis as last year - Instagram, Snapchat and YouTube.

When we look at how daily use of these platforms has changed since 2016, we note that all platforms apart from Facebook and Twitter have seen increases.

However, when looking year-on-year, we see all platforms have either remained steady or seen a decline - apart from Pinterest which has seen a 25% increase (but only 5% of people are now using this on a daily basis compared to 4% last year).

Facebook continues its trend of losing relative market share among the Clearing student audience, with just 31% of respondents using the platform daily, compared to 37% in 2019/20, 51% in 2018/19 and 66% in 2016/17.





As Clearing students shift their platform preference, remember there will be differences in what works, depending on your audience profile and what type of institution you are. Use your own audience and web analytics to understand where your web traffic is coming from. Use a social benchmark tool like Edurank to understand which content is working, what cuts through, and how your institution compares to similar institutions.

When it comes to your marketing and influencer plans, ensure you have a solid cross-platform strategy at the core, because with all your budget poured into one channel, you could be missing a huge opportunity. The way to understand how well your advertising mix works at each stage of the funnel is by tracking effectively. Don't just look at direct response and immediate conversions - try to understand the impact of various channels and campaigns on your brand against your competitors.

Think Student

With two billion downloads globally, more than 500 million active users worldwide, and an average daily view time of 52 minutes, TikTok continues to take the world by storm.

It's the fastest-growing social media platform in the world, and 41% of TikTok's users are aged between 16 and 24 years old. This isn't surprising, considering the app was originally created to appeal to under-18s, reflecting the habits and behaviours of this age group, and TikTok's mostly joyful user-created content has struck the right chord with students stuck at home during a global pandemic.

It may feel like a step into the unknown, but TikTok really is a must for any student marketer. We now include TikTok as standard in every media plan we produce (where TikTok answers the challenge of your campaign brief), and it's automatically included as standard by Akero.

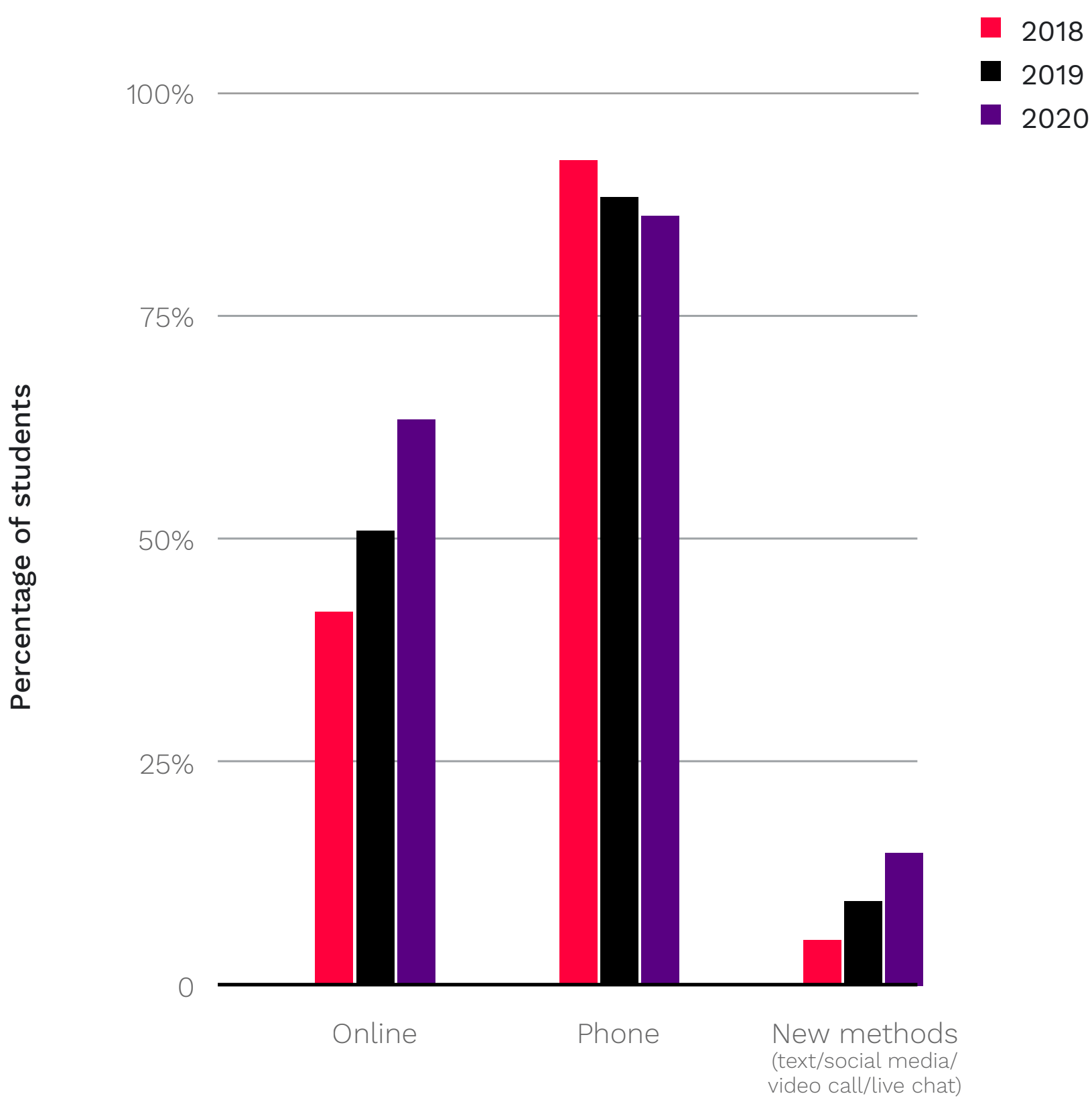
TikTok is less saturated with brands than its older counterparts, presenting a major opportunity to advertisers.

As the Covid-19 crisis continues to push us all at least two metres apart, through singing, dancing and memes, TikTok is keeping students connected and engaged. And we can help you get started; if you'd like to learn more about how to get your brand on TikTok, our **Student Marketer's Guide to creating a TikTok content strategy** that really works is a great place to start.

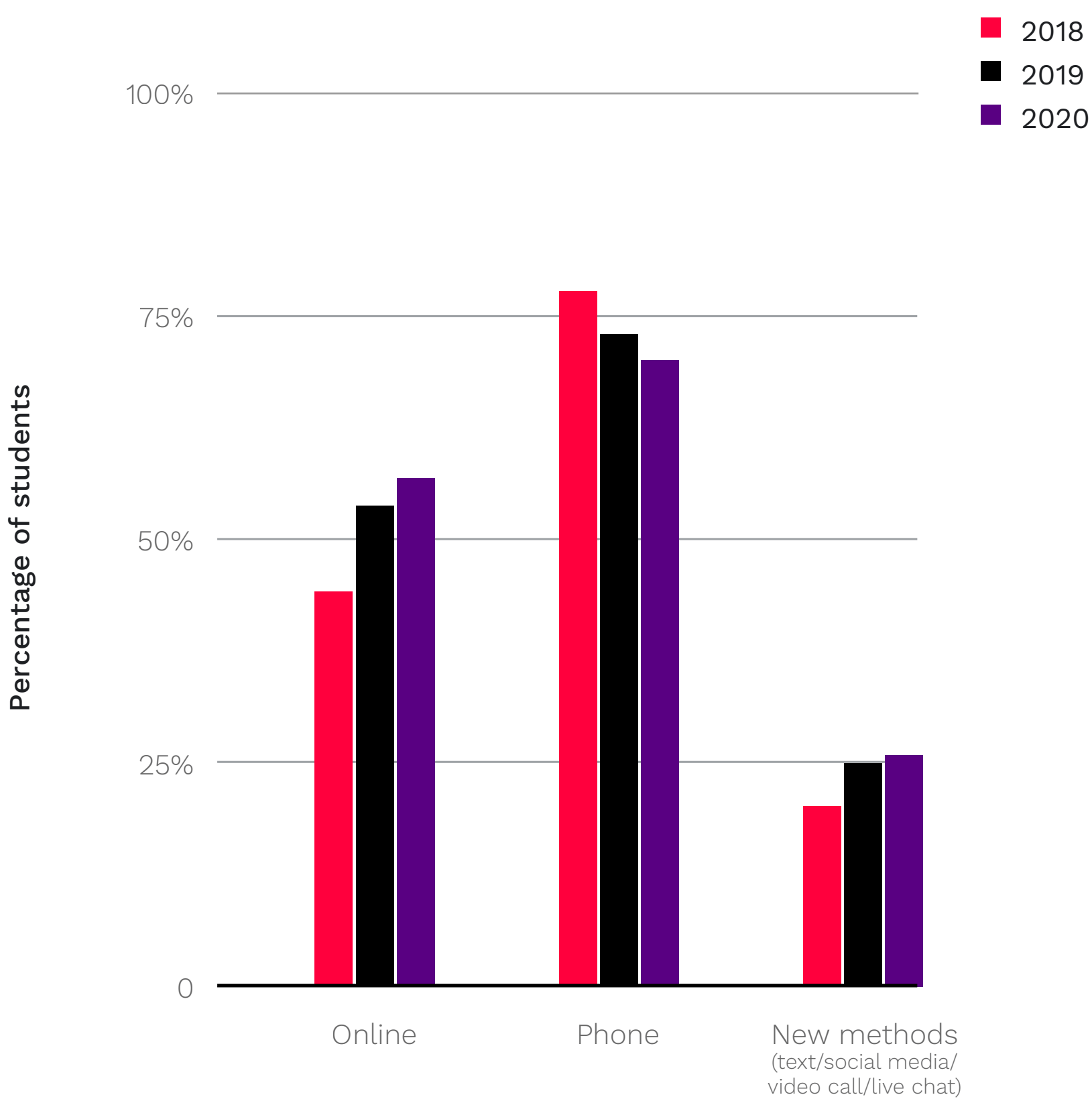


4. Students want universities to move towards more modern tools and communication channels.

What methods of contact did you use?



What methods of contact do you want to use?



Our fourth key finding is focused around how students want to be able to engage with you throughout Clearing. There is a shift towards students wanting to engage with more modern tools and communication channels.

Rather than browse through all vacant courses available, we found that three in 10 students use UCAS's Clearing Plus service to help match relevant courses to their needs, and 85% of those who used Clearing Plus found it helpful. Adding a matching service to your website or throughout your process could be an effective way to help students make their Clearing decisions more easily.

When looking at contact methods we see a disparity between how students contacted universities versus how they want to be able to contact them.

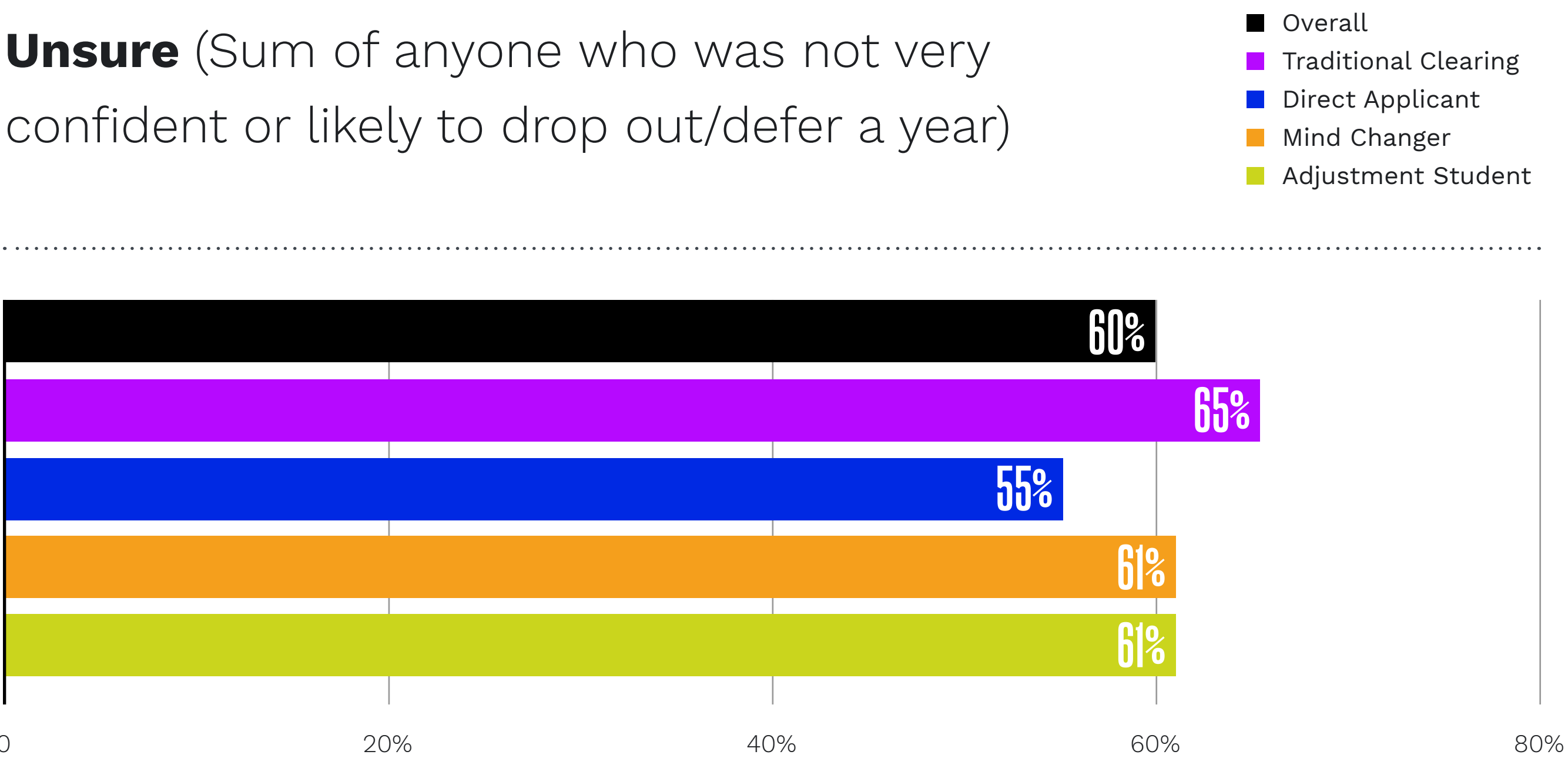
One in seven students used more 'modern' methods such as text, social media, video call or live chat this year, however almost double this number, one in four, would like to use these methods and want them to be available - something worth thinking about investing in for next year.

We can also see that interest in all online methods of contact has grown over the years, with more and more students wanting to use online contact such as email (43%), live chat (17%), online forms (15%) and social media (4%).

Looking at more traditional methods of contact, phone calls are still key, but although 86% of students called up during Clearing, 16% of these would have preferred not to (preferring to use online methods of contact) - which could be negatively affecting their Clearing experience.

5. The majority of Clearing students feel unsure about their choices.

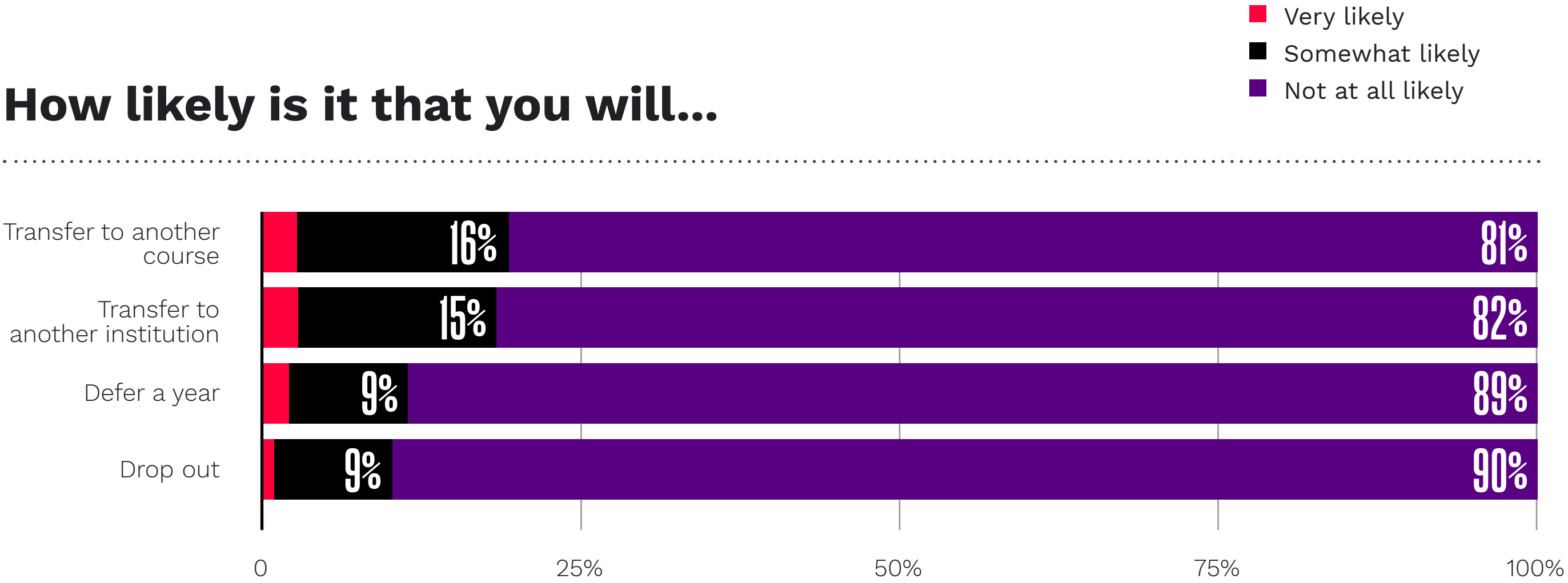
Unsure (Sum of anyone who was not very confident or likely to drop out/defer a year)



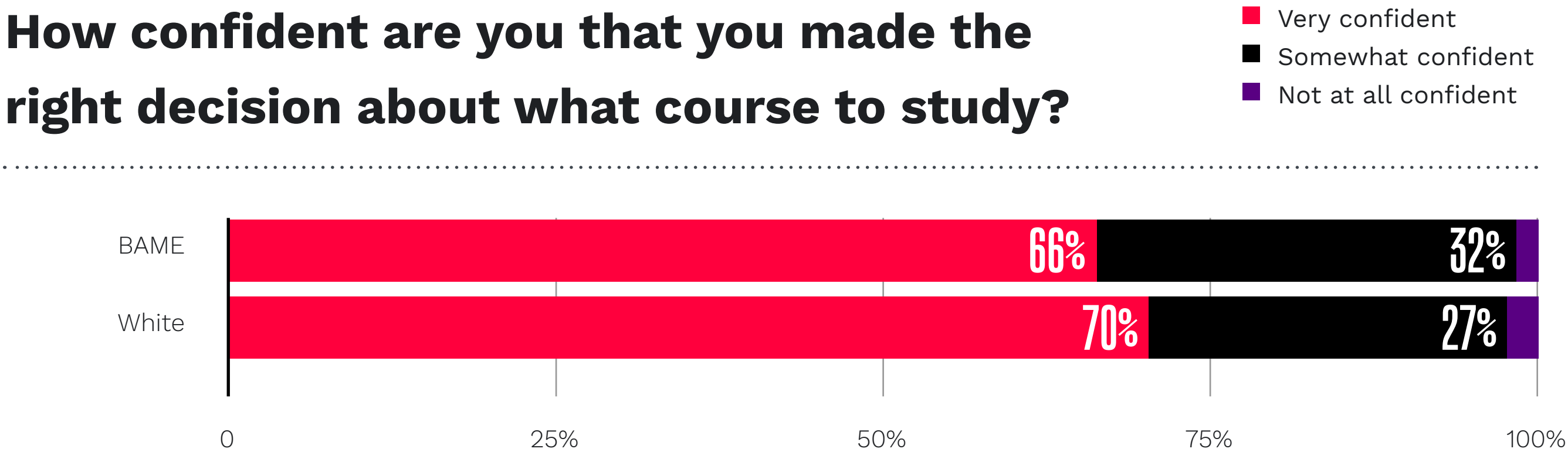
This year we also saw high levels of uncertainty in students' Clearing choices - with three in five students feeling unsure about at least one aspect of their choice.

3 IN 5 CLEARING STUDENTS FELT UNSURE ABOUT THEIR UNIVERSITY CHOICES.

How likely is it that you will...



How confident are you that you made the right decision about what course to study?



When we break this down to what they felt unsure about, we see that the biggest concerns are about their choice of university - with four in 10 students citing that they had some concerns about the institution that they picked, and three in 10 students having some concerns about the course they picked. Breaking this out to different demographics, we see students from Black, Asian and minority backgrounds feel less confident about their decision, so you may wish to consider different strategies for different demographics.



Signing up to be a partner of the NCS will give you access to your own institution's data, allowing you to compare your students' feelings, actions and motivations against the national findings, and giving you the insights you need to tailor your communications to your varied student groups.

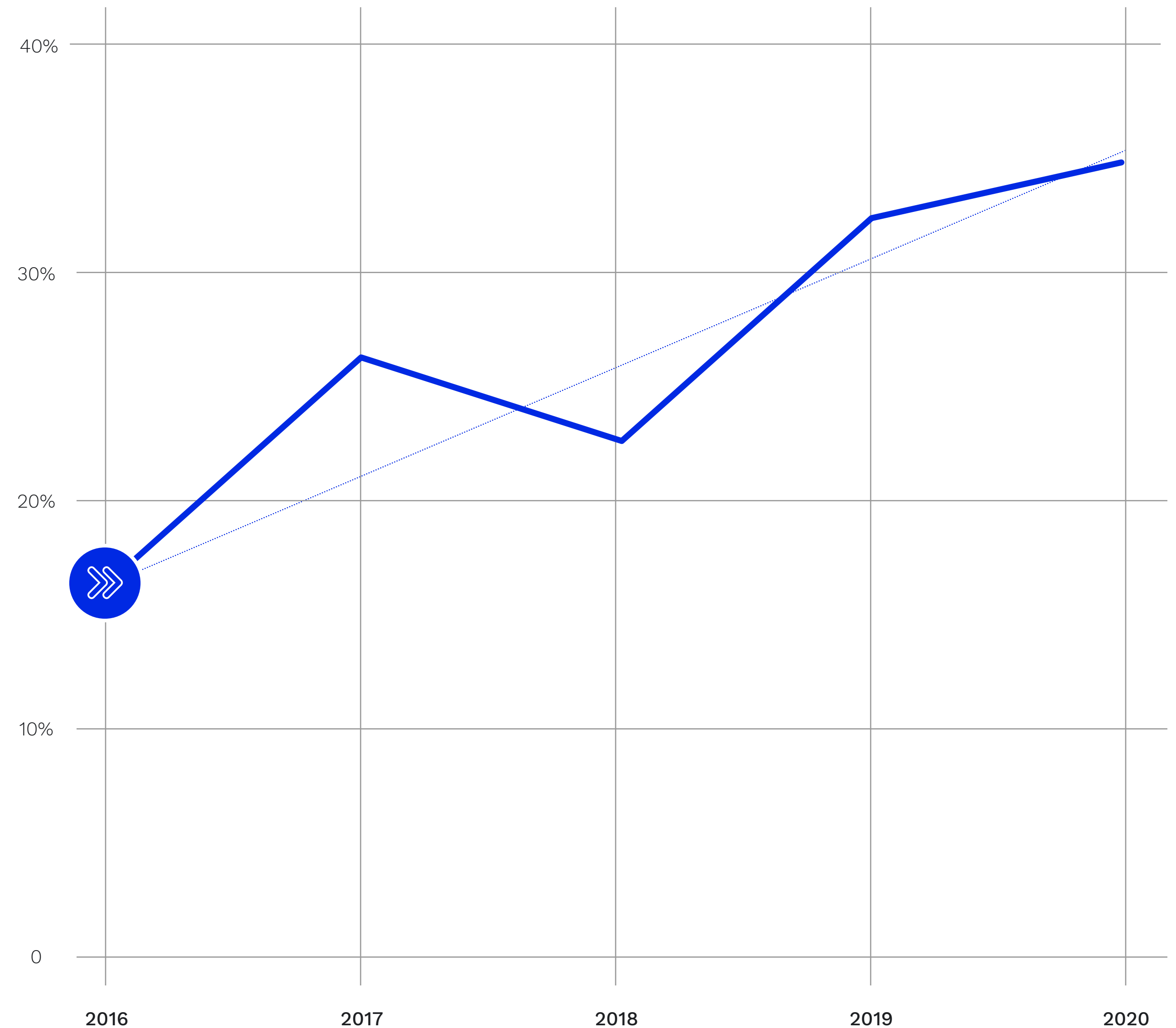
Students going to a Russell Group institution were the most confident about their university choice and the least likely to consider transferring. Students going to a specialist university were the least confident and more likely to consider transferring.

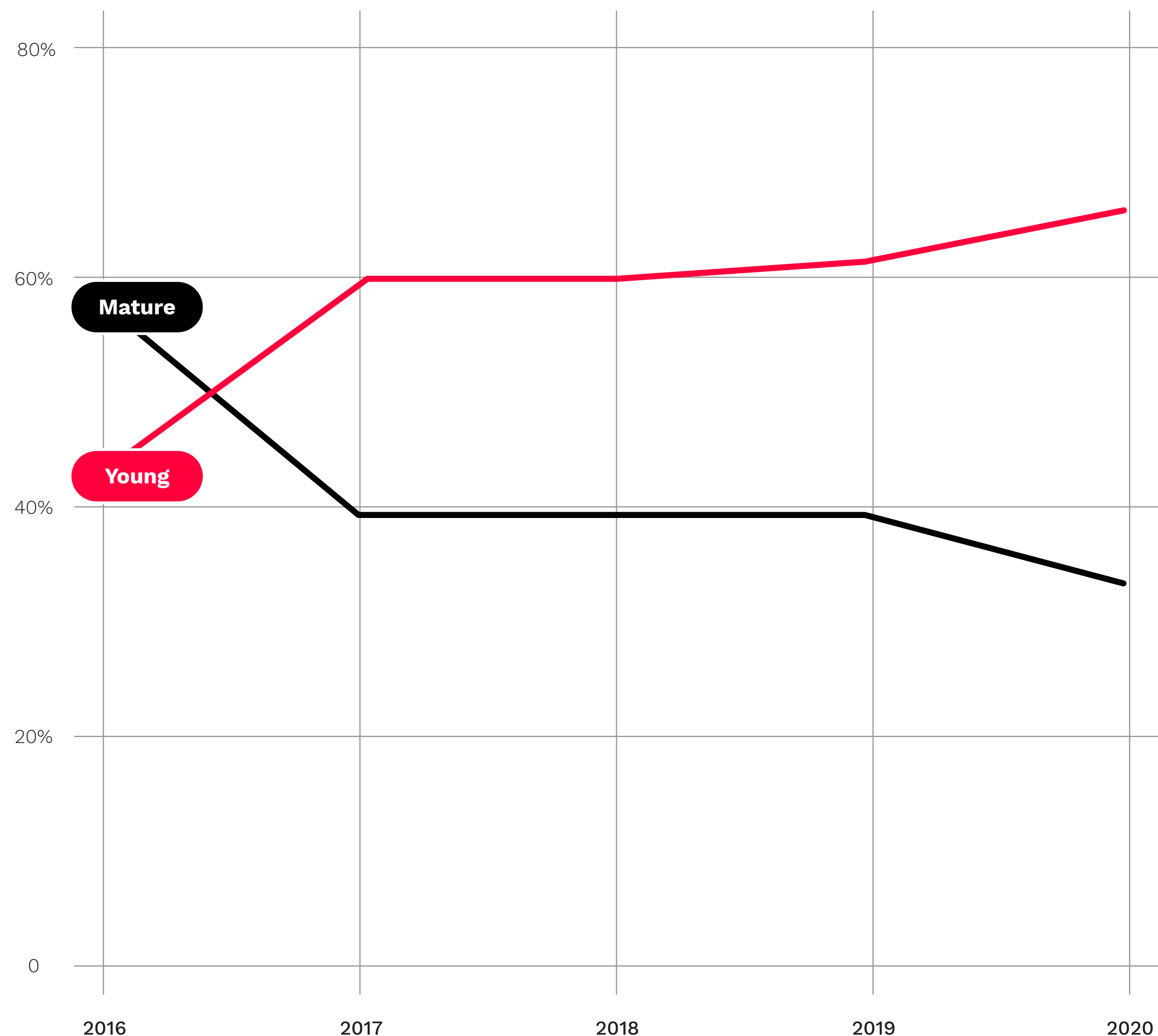
We also found that two in 10 students are considering transferring onto a different course or to a new institution and that 10% said it was likely they would defer/drop out. Students who fall into the largest persona group, the Traditional Clearing Student (40% of the sample), were the most likely to feel unsure about their choice and to consider action.

6. Applying through UCAS as a Direct Applicant continues a long-term trend of being an active choice. Direct Applicants continue to increase their market share.

More than one in three students are applying through UCAS as a Direct Applicant.

The number of students applying through UCAS as a Direct Applicant continues a long-term trend of increasing, rising to 35% of the market share in 2020, compared to just 18% of the market share in 2016. This finding is in line with the UCAS end-of-cycle report.





The choice to apply direct is becoming more common with younger students. While 56% of Direct Applicants were mature in 2016, this number has fallen to just 36% this year.

The impact of government u-turns over A Level Results Day will have played a part in this behaviour, with younger students waiting to finalise their grades before confirming their study destination. What remains to be seen is whether we will see this trend continue into 2021 and beyond. Will we see more and more students use Clearing to become further empowered in how they choose where and what to study? And are these insights the first useful data-set in terms of understanding what a post-qualification admissions system might look like in terms of student behaviours and decision making?

The most common reason for applying direct has remained consistent: students decided to apply at the last minute and/or had a change in personal circumstance.

If you're not already doing so, prepare your website for this audience and capitalise on a growing market.

Remind yourself what the Direct Applicant looks like, including their unique influences and barriers, using the persona and Clearing timeline. Conduct audits to look at your site traffic and understand where, how, and why your audience are visiting and using your site - this will allow

you to identify which content is (or isn't) working. And ensure that all your Clearing landing pages contain clear messaging aimed at the Direct Applicant, and include best-practice contact forms. Collecting data is vital, as you can use it in early campaigns to maximise your chance of influencing student decisions.

Focus on creating and implementing a long-term content strategy targeted at the Direct Applicant group and, using the insights in the report, address the unique concerns, barriers, and influencing factors for your target market.

**MORE THAN
ONE IN THREE
STUDENTS
ARE APPLYING
THROUGH UCAS
AS A DIRECT
APPLICANT.**

Conclusion

This is the sixth, and arguably most significant, edition of the annual National Clearing Survey, providing year-on-year benchmarks and long-term trends. The content of this report arms higher education marketers with the data, trends and insights they need to successfully fill their Clearing places. It enables them to clearly segment their own Clearing applicants into four profiles and personas, and benchmark findings against the national average by institution type. The results will form the backbone of cross-channel, cross-platform marketing strategies that truly address the needs of prospective higher education students.

Since 2015, the Traditional Clearing Student, the Direct Applicant, the Adjustment Student and the Mind Changer have become the industry standard for segmentation during Clearing, and they've been used in hundreds of marketing strategies. With the pandemic causing once-in-a-generation disruption to the marketplace, we wanted to examine whether these four profiles are still relevant going into 2021/22.





The good news is – they are. While it would be easy to present a new persona to attract some headlines, the rigour with which the current personas have stood up to scrutiny and analysis shows that they remain fit for purpose. The impact of Covid-19 has been felt by almost every student in some way, which we have seen reflected in the findings of this year's report, but not in a manner that presented or warranted an entirely new persona.

The impact of Covid-19 will be felt long and hard, and every strategic marketing, recruitment and admissions plan will need to adapt to reflect each segment's different and unique journey. This report helps you understand and shape your strategies in this new world, using the insights within to obtain a national picture. Those that use the insights from the National Clearing Survey, overlaid with their first-party data and their own research, and utilise new technologies such as AI, cutting-edge automation, and advanced tracking technologies, will be those who will get ahead in 2021. Those that can provide genuine empathic communication and support services, will not only improve the student experience, recruitment and retention, but will also strengthen their brand.

While we have presented the national findings, please note that when we drilled down to specific institutions, we did find quite varied results. This highlights the importance of understanding your own Clearing students and benchmarking them against the national findings. Each of our partnering institutions will have received their own data with which to do this.

Partnering with the National Clearing Survey is free and open to all HEIs who have open vacancies during Clearing 2021.

Our findings offer a fascinating insight into the rapidly evolving behaviours and consumption habits of Clearing students. They are using the Clearing process to their advantage, and higher education institutions need to adapt their strategies each year if they are to attract students and maximise conversions during this period.

To reflect changing attitudes, methods, and the adoption of new technology, the National Clearing Survey will be updated and repeated in 2021.



Take part in the National Clearing Survey 2021/22

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 the National Clearing Survey. There are a number of benefits to your institution if you choose to participate:

- You'll receive a survey to share with your 2021 Clearing students
- You'll be the first to receive a copy of the full report before non-participating institutions
- You can access your institution's raw data which will allow you to benchmark the actions of your students with the national findings
- Your students who take part will automatically be entered into a prize draw to win a high-value prize to help with their ongoing studies
- You get to make the life of a Clearing student easier

Register to take part in the National Clearing Survey

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