



NATIONAL CLEARING SURVEY

Annual Report 2017



NATIVES GLOBAL
CONSULTING

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NATIONAL CLEARING SURVEY
ANNUAL REPORT 2017

NATIVES GC

About The National Clearing Survey

The National Clearing Survey was launched to better understand the journey that students take through the Clearing process. It is the biggest of its kind, representative and independent.

The survey is a major national initiative and is the only one of its kind that analyses the Clearing journey from the point of view of the student. Partnering with one in five Russell Group universities, one in five post-92 HEI's plus specialists institutions, the 2017 National Clearing Survey analysed over 250,000 data points and conducted deep-dive qualitative surveys with 2,979 students. The results have been benchmarked against the findings from 2016, to identify evolving trends and behaviours. This has allowed us to identify short and long-term trends, make further recommendations and present the most insightful National Clearing Survey ever.

At the end of the 2017 cycle, there was a record number of applicants who were accepted through Clearing. In 2017, applications via the two routes - those who had previously applied for a place through UCAS, and those who were applying for the first time through Clearing (direct applicants) - reached a record high of 66,851, an increase of 3.1% from the previous year. Acceptances through the main scheme decreased by 0.2% in 2017, to 49,920. Increases in Clearing acceptances in 2017 came from direct acceptances, which increased by 14% from 2016 (equating to 2,100 more direct acceptances). The National Clearing Survey responses reflect this change with our own findings showing an increase of 9 percentiles for direct applicants, indicating that the sample and findings are reliable and in line with those of UCAS.

The National Clearing Survey enables decision makers, marketers, admissions advisers and senior leaders from the Higher Education sector to gauge a more detailed understanding of students' actions prior to, during and post-A-level Results Day. The report looks at students' main influences and motivations when choosing a course, their journey through Clearing and their motivators when selecting a place.

This report offers insights, defines target audiences and behavioural trends, and presents a timeline with key dates so that you are equipped with the information you need to target your prospective students through the right channels, at the right time and with the right message. It allows you to move beyond assumptions about Clearing and focus on data-driven insights, to help with long-term planning and equip you to make marketing decisions that will give you the edge.

The National Clearing Survey ran from the 18th August 2017 and closed at midday on the 19th October 2017. Thirty-one Higher Education Institutions participated. The survey was taken by 2,979 respondents who enrolled at 84 different Higher Education Institutions, giving a truly national picture.

Executive Summary

1

Clearing students can be segmented into four distinct groups: Traditional Clearing Student (45%), Mind Changer (25%), Direct Applicant (27%), and Adjustment Student (4%).

2

Applying through UCAS as a direct applicant is now an active choice. The National Clearing Survey found that the largest growth came from our Direct Applicant profile group, up nine percentiles from 2016.

3

Students continue to use a huge variety of social media. Snapchat is being used on a daily basis by 71% of respondents (up from 65% in 2016) whilst Instagram is used by 68% (up from 59%) and Youtube at 66% (up from 59%). Facebook remains a popular platform but has fallen by 6% from 66% in 2016 to 60% in 2017. It is important for institutions to maintain a presence across all platforms but also important to analyse your own marketing activity, social media engagement and strategy. Whilst this report presents a national average, we did see big differences at institution level, highlighting the importance of understanding your own data and using the findings here in the context of the nationwide average.

4

Over half (52%) of respondents went through Clearing for reasons other than achieving lower grades than predicted.

5

Overall, “subject” was the most important factor to students (rather than institution) when they were securing their Clearing place. HEIs therefore need to provide detailed and engaging course-level messaging and campaigns need to promote specific courses.

6

81% (down from 85%) of Clearing students have already heard of the HEI they enrol with and 69% (down from 77%) have visited the HEI’s website before Clearing. HEIs need to keep long-term, brand awareness campaigns at the forefront of their strategies to make sure they are on students’ radars during Clearing.

Executive Summary

7

Friends are still the biggest influencer in Clearing. Friends were once again cited by one in five students as the most common introduction to students' Clearing destination, and were most influential to the Direct Applicant, accounting for almost one in four of all referrals.

8

You must be mobile ready. 60% of students used a mobile device during their Clearing searches, whilst mobile-only searches accounted for 20%, an increase of 3% on 2016. Make sure you have dedicated tactics for mobile search and a cross-device strategy to reflect the modern search behaviour of a Clearing student.

9

The Traditional Clearing Student is contacting on average 3.7 institutions during Clearing (compared to 3.4 in 2016), with only 40% taking the first offer they received (down from 43% in 2016). This highlights the importance of on-the-day closing and conversion. Use the additional findings in the report and audit your processes to uncover where and how you can increase on-the-day conversion opportunities and ensure your call staff are able to meet the requirements of Clearing students on A-level Results Day.

10

61% of students did not pick their Clearing destination as one of their five original UCAS choices, meaning marketers have new student audiences to target during Clearing who may not already be in their HEI's system.

11

Similar to 2016, call handlers were less able to answer student queries about availability of accommodation, course content, availability of course places, career options and the fit of the institution and course. Call handling teams should be trained on a broad range of issues relevant to students in order to maximise conversion during Clearing.

12

The most popular method for confirming a place in Clearing was via phone call, followed by UCAS and email. 33% of students say they would like to confirm their place via live chat, compared to 10% who actually did so. With Clearing being more competitive than ever before, providers can give themselves the edge and increase conversions by providing this service.

Methodology

The National Clearing Survey 2017 was open to all students who had gone through the Clearing process, and secured a place at a Higher Education Institution, for the academic year of 2017/2018.

Every university which listed courses in Clearing 2017, was invited to collaborate on the National Clearing Survey by the Insights Division at Natives Global Consulting. In total, 31 institutions took part.

Equal weighting was given to each participant's response.

SECTION 1.

Overview of respondents' demographics and geographies and digital behaviour



Section 1: The Four Clearing Profiles

The National Clearing Survey results have revealed four distinct audience profiles who accessed Higher Education through Clearing.

Each profile has been developed using data from the survey responses, and their identities have been measured and presented using demographics, geographies, education, destination, motivations, influencers and the top social platforms used daily.

This segmentation is important as it reveals different characteristics beyond what education professionals might consider as a 'Traditional Clearing Student.' It illustrates that there are opportunities for smart targeting within an institution's Clearing strategies 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 and will have got lower grades than expected on A-level Results Day.



THE ADJUSTMENT STUDENT

The Adjustment Student has entered Clearing because they received better grades than expected and they are looking for a Higher Education Institution with higher grade boundaries.



DIRECT APPLICANT

Older than the other groups, the Direct Applicant will often have already received their results in a previous year and will be applying for a place for the first time through the Clearing process.



THE MIND CHANGER

The Mind Changer is going through Clearing for reasons other than educational, linked to social or environmental factors, which have influenced them to change their mind on their institution.

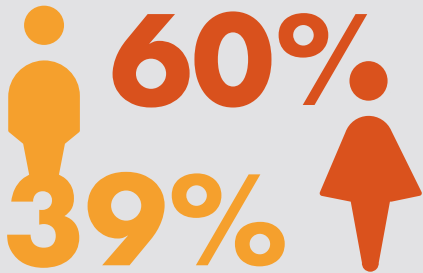


The Traditional Clearing Student

AGE

18.5

GENDER DIVIDE



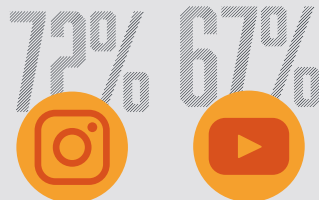
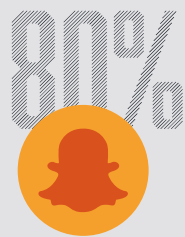
ETHNICITY

45% White British

8% Pakistani

7% Indian

Top social platforms for daily use



Course choice factors



Qualifications

93%
A-LEVELS

DESTINATION

38% Post 92

38% Russell Group

22% Other University

1% Specialist Institution

1% HE at FE

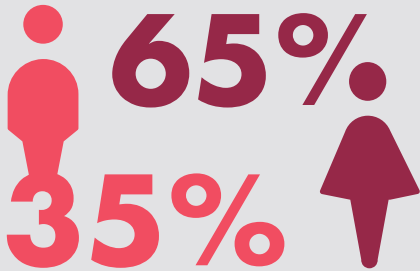


The Adjustment Student

AGE

19.3

GENDER DIVIDE



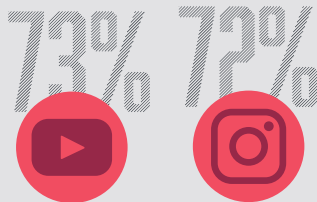
ETHNICITY

34% White British

11% Pakistani

10% African

Top social platforms for daily use



Course choice factors



Qualifications

72%

A-LEVELS

25%

BTEC

DESTINATION

49% Russell Group

33% Post 92

19% Other University

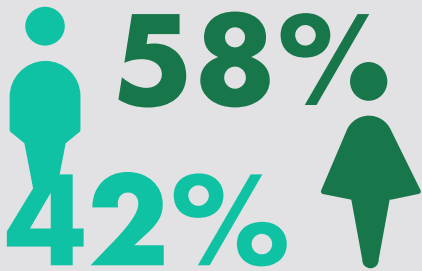


The Direct Applicant

AGE

22.6

GENDER DIVIDE



ETHNICITY

49% White British

13% African

5% Pakistani

Top social platforms for daily use



Course choice factors

1 Course subject

2 Career prospects

3 Institution location

Qualifications

23%

66%

BTEC

A-LEVELS

DESTINATION

59%

Post 92

15%

Russell Group

22%

Other University

2%

Specialist Institution

2%

HE at FE

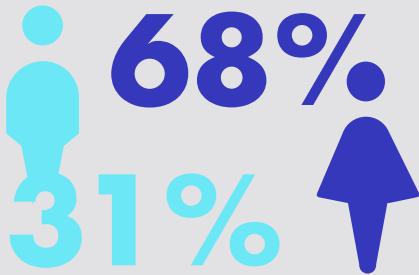


The Mind Changer

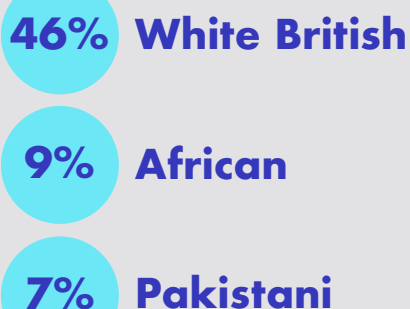
AGE

19.5

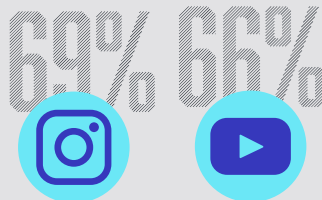
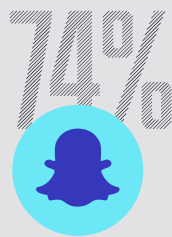
GENDER DIVIDE



ETHNICITY



Top social
platforms
for daily
use



Course
choice
factors



Qualifications

17% 78%

BTEC A-LEVELS

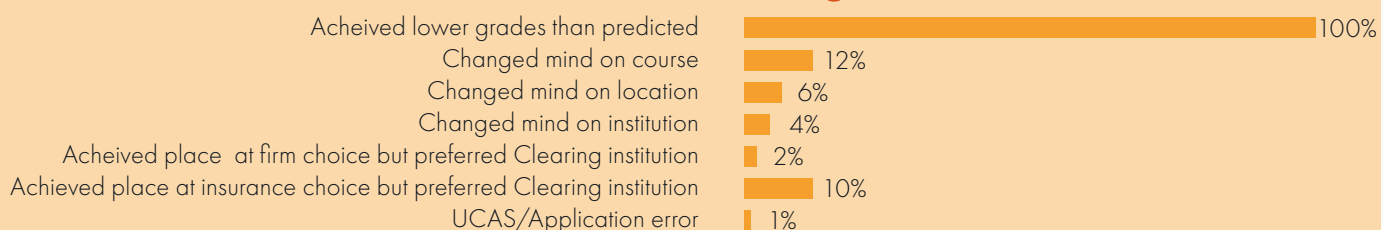
DESTINATION



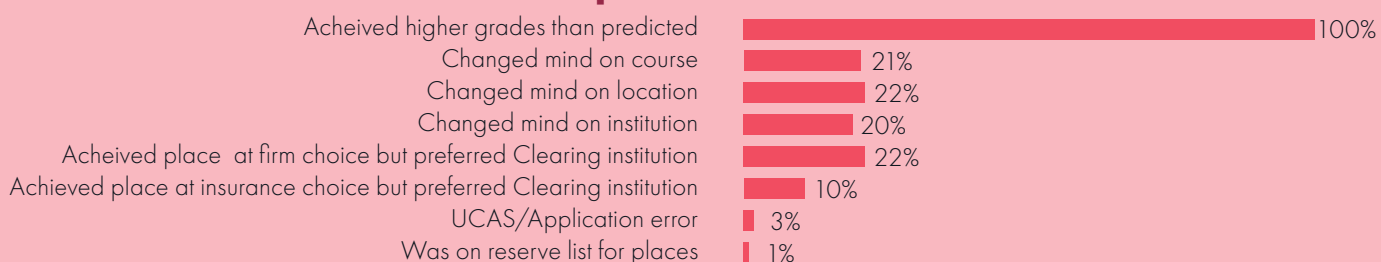
Section 1: Reasons for Accessing Clearing

It is widely assumed that the typical reason for students entering the Clearing process is because they did not achieve the grades they needed to be accepted into either their firm or insurance choice. While this remains the reason for many students, over half (52%) went through Clearing for other reasons.

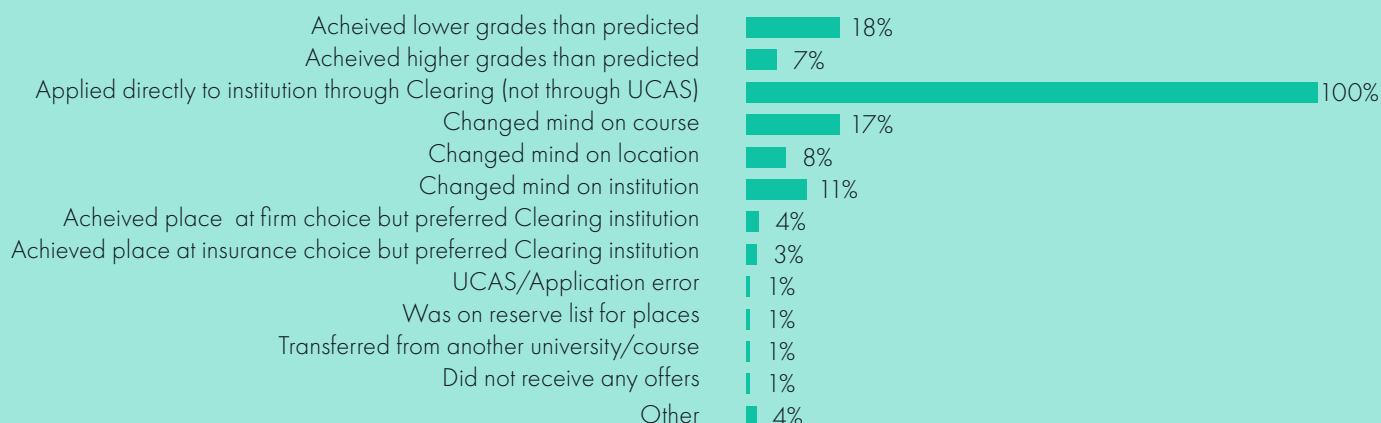
The Traditional Clearing Student



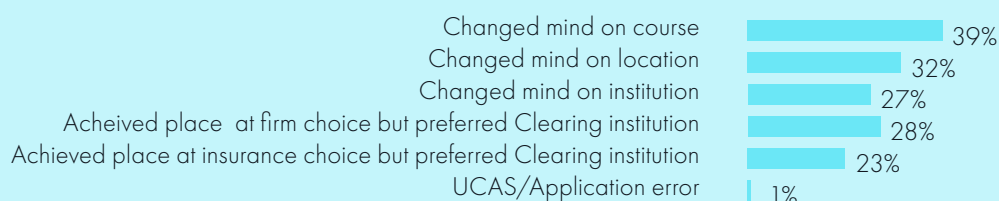
The Adjustment Student



The Direct Applicant



The Mind Changer



Section 1: Respondent's Profile

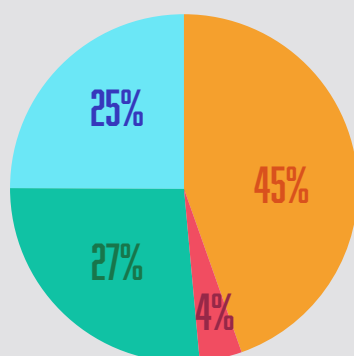
The chart below shows the overall respondents by profile group. Each response was given equal weighting in the final analysis.

45% of the responses from the National Clearing Survey were from the Traditional Clearing Student profile. This is the youngest group, with an average age of 18.5. The next biggest group was the Direct Applicant (27%), the oldest group with an average age of 22.6. The Direct Applicant overtakes The Mind Changer as our second biggest profile for the first time since this survey began.

Compared to 2016, we see the biggest variation of data in the Direct Applicant. The average age has decreased from 24 in 2016 to 22.6 in 2017. This group has grown from 18% of the sample in 2016 to 27% of the sample in 2017.

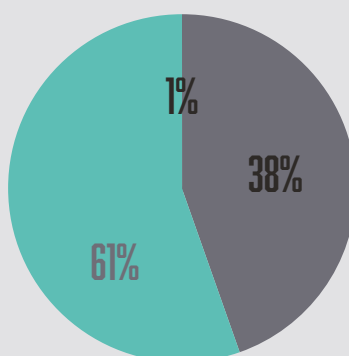
61% of respondents identified as female, which is representative of the national picture.

OVERALL RESPONDENTS
BY PROFILE



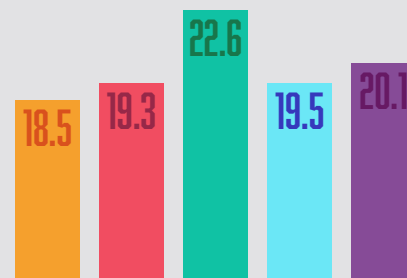
- Traditional Clearing Student
- Adjustment Student
- Direct Applicant
- The Mind Changer

GENDER



- Female
- Male
- Prefer not to say
- Other

AVERAGE AGE

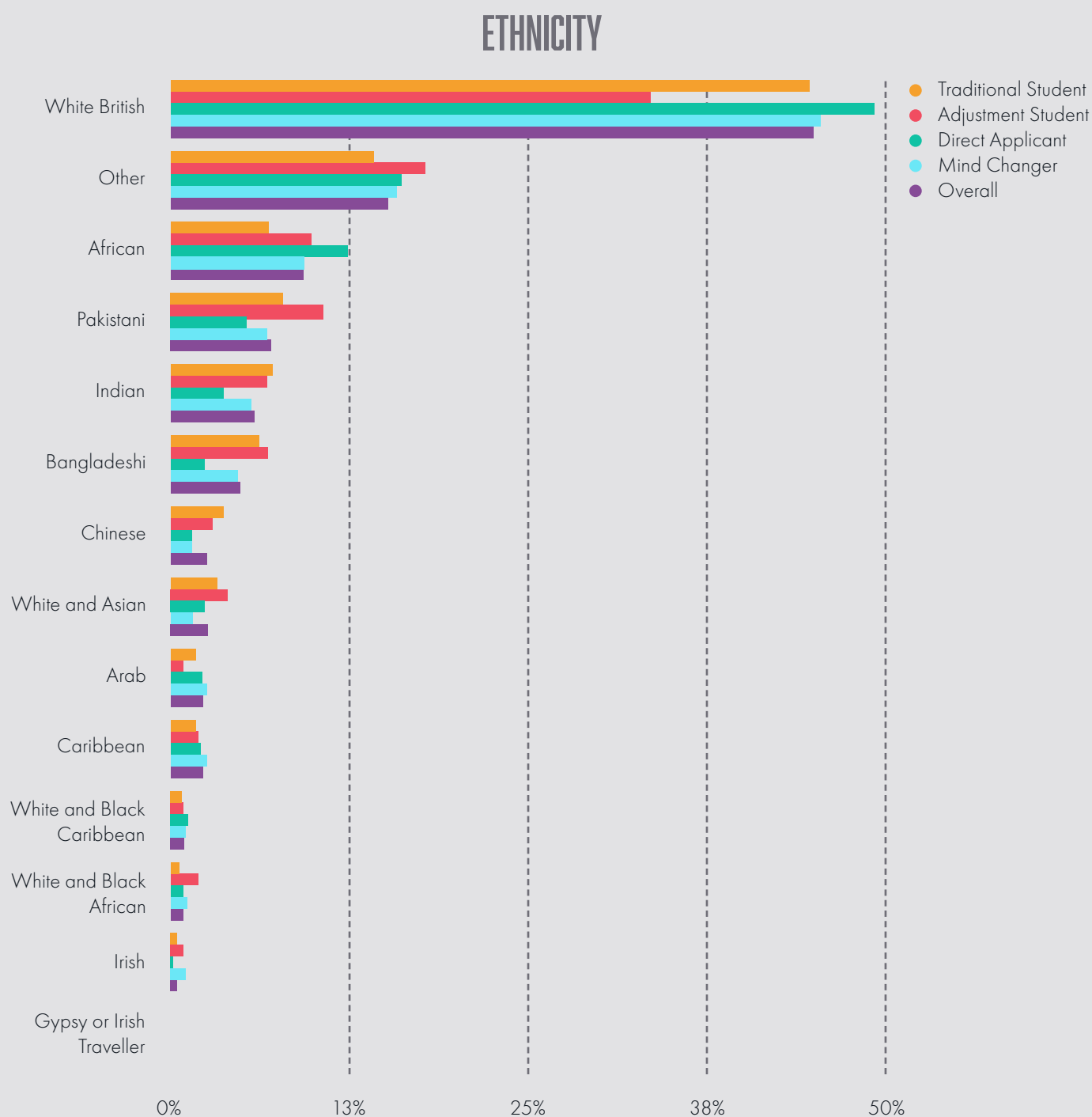


- Traditional Student
- Adjustment Student
- Direct Applicant
- Mind Changer
- Overall

In 2017 we see the largest profile growth in the Direct Applicant group, up by nine percentiles on 2016. Providers armed with this information can shape their marketing strategies and messaging towards this group and need to ensure that their own online application portal offers a seamless digital experience.

Section 1: Respondent's Profile

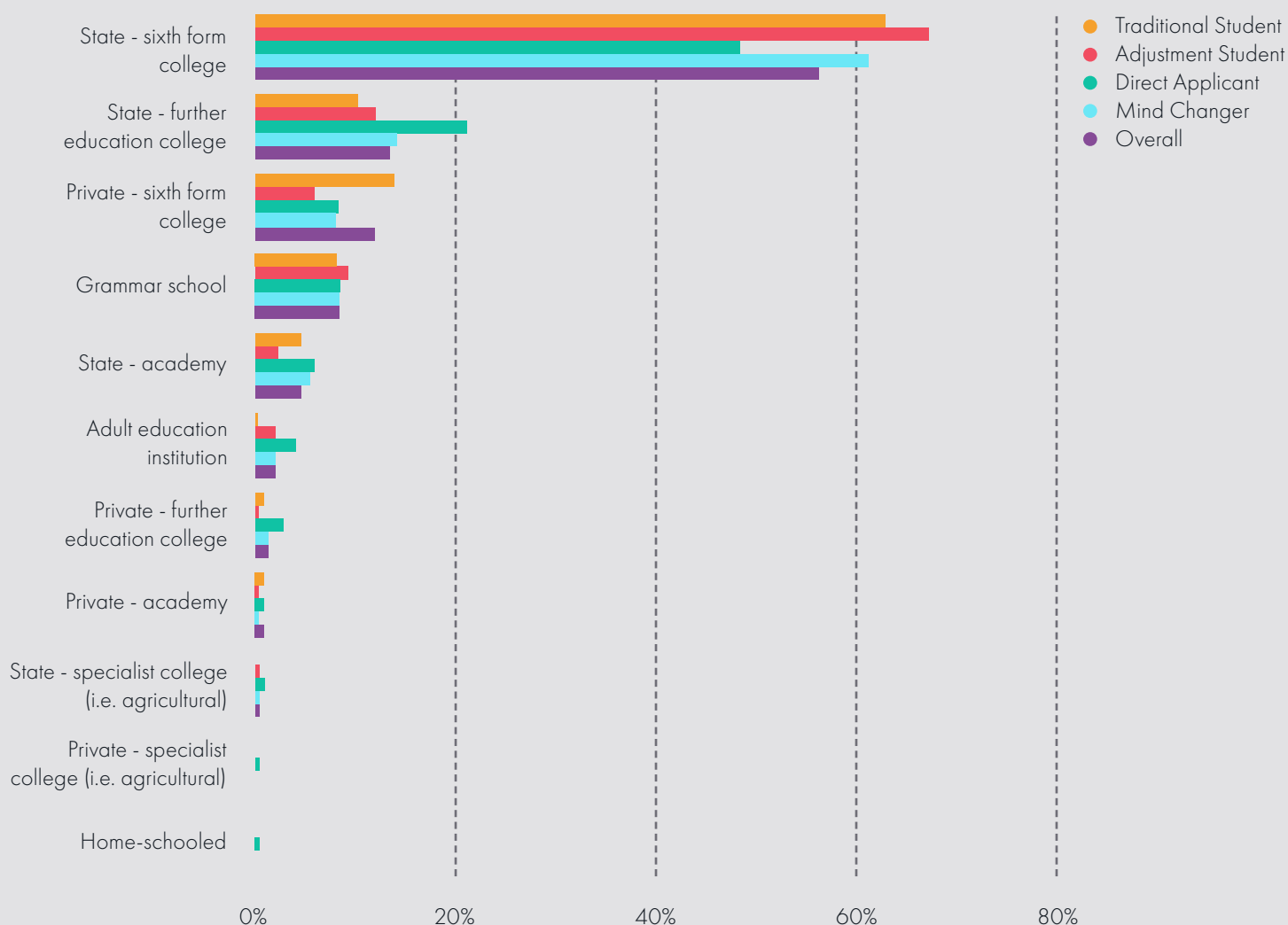
Just under half (45%) of respondents identified their ethnicity as White British. The next highest group identified as Black/African/Caribbean/Black British/African, at 9%, followed by Pakistani - Asian/Asian British (7%).



Section 1: Further Education

Over half of the respondents (57%) attended a state sixth form college (or attended sixth form in their secondary school). The next most popular institution type was a state further education college (14%). The outlier is the Direct Applicant, who is less likely to have attended a state sixth form college (48%) than any other profile, and more likely to have attended a state further education college (21%) than any other profile. The Direct Applicant appears to have the most diverse educational background, which may be expected as they tend to be older and coming back into education, and therefore not progressing directly from GCSEs into A-levels.

WHAT TYPE OF FURTHER EDUCATION INSTITUTION DID YOU ATTEND?

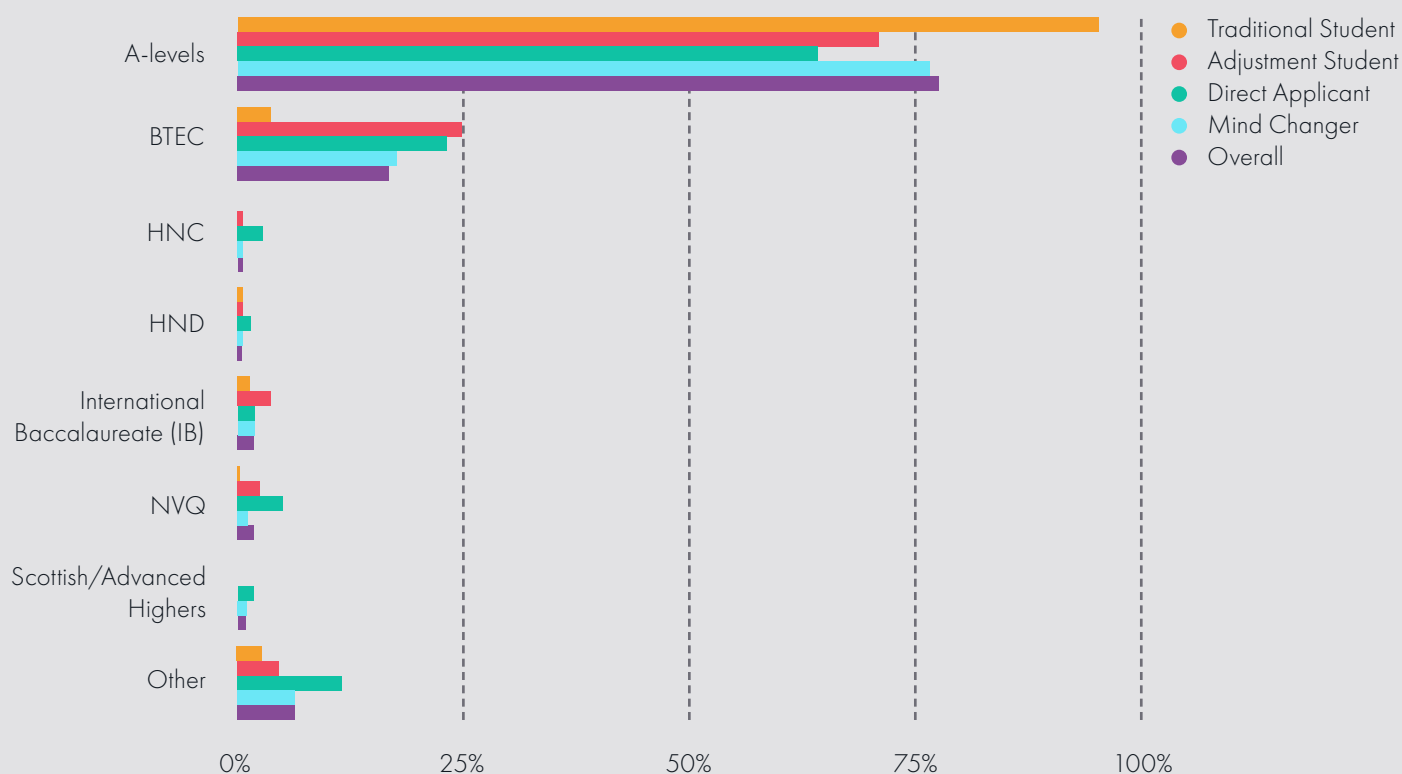


Section 1: Further Education

The most common qualification studied was A-levels (79%) followed by BTEC (14%). However, there has been a decrease of respondents taking BTEC, down 5% from 2016.

In our largest group, the Traditional Student, 93% of respondents studied A-levels, which is 15 percentile points higher than the next nearest profile group, the Mind Changer. The Adjustment Student (25%) and the Direct Applicant (23%) are the most likely groups to have studied a BTEC.

WHAT TYPE OF FURTHER EDUCATION QUALIFICATIONS DID YOU STUDY FOR?



Section 1: Social Media

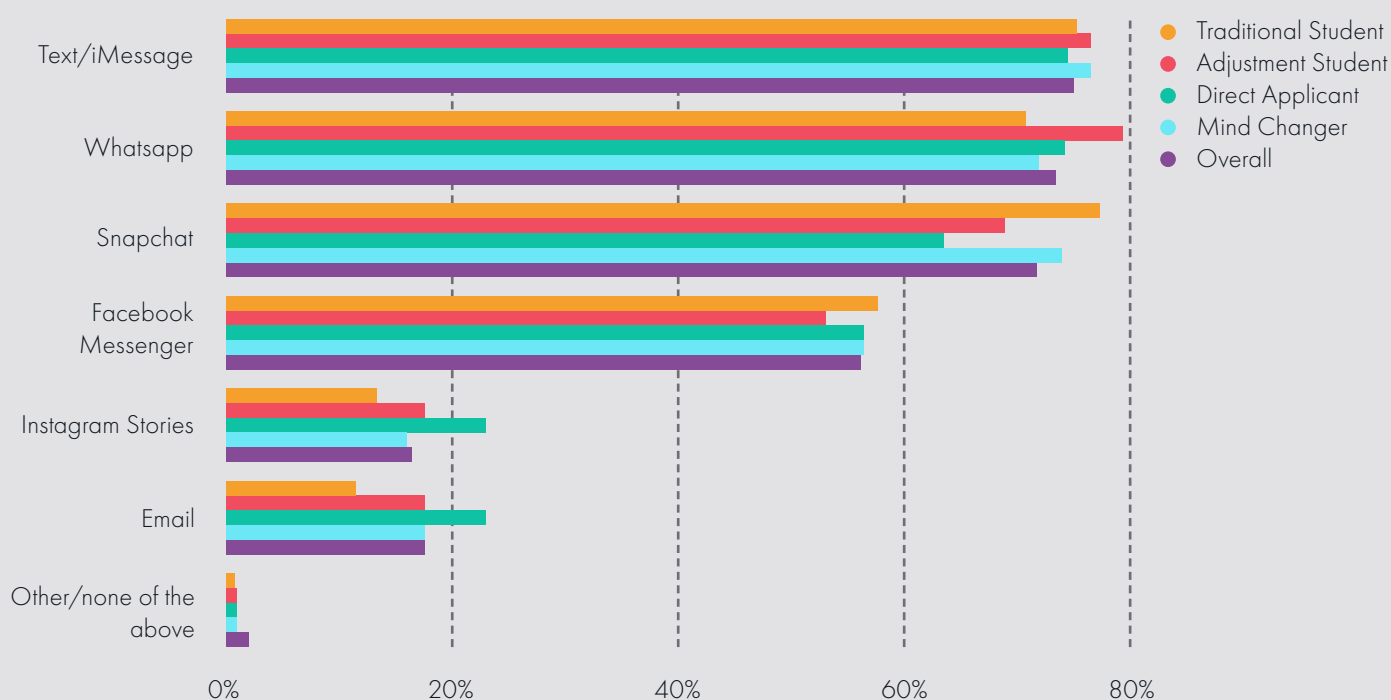
This section explores which channels are used on a daily basis to communicate with one of the respondents' most important influencers, friends.

Overall, students were most likely to use text/iMessage to communicate with friends at 74.2% in 2017, down from 90% in 2016. The second most popular platform is WhatsApp, 71.2% in 2017, down from 82% in 2016.

However, Snapchat is most likely to be used by the Traditional Clearing Student, with 75.7% of this group using it on a daily basis to communicate with their friends, perhaps reflecting the prevalence of this channel amongst younger respondents.

Facebook Messenger saw a decrease of eight percentage points in 2017 based on 2016. The oldest profile, the Direct Applicant, are the least likely to use Snapchat, but are very active on Whatsapp, with 72.5% using the platform on a daily basis.

WHAT CHANNELS DO YOU USE DAILY TO COMMUNICATE WITH YOUR FRIENDS?

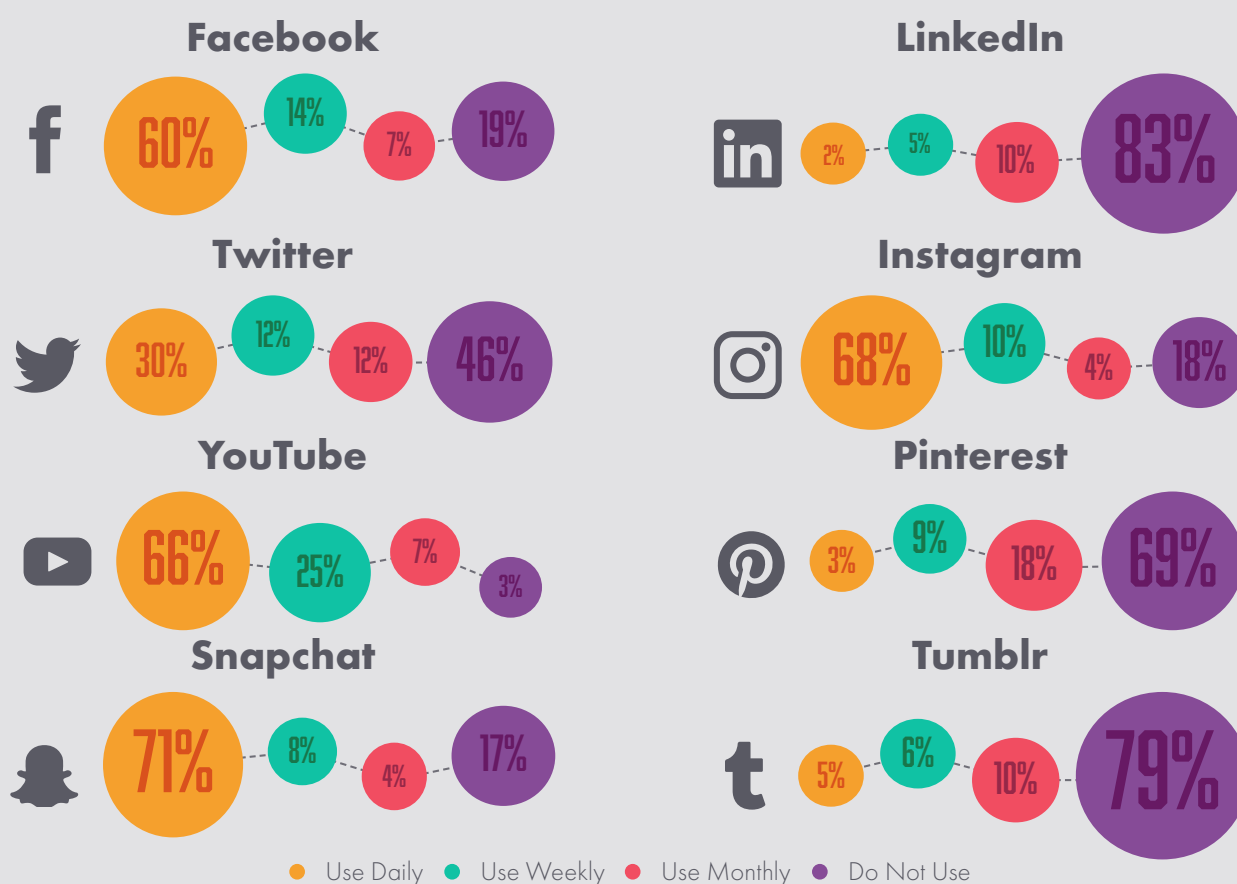


Clearing students are diversifying which platforms they use on a daily basis to communicate with friends. Furthermore, there is varying behaviour depending on which profile group we look at. Make sure your marketing and influencer plans and tactics have a cross-platform strategy incorporated.

Section 1: Social Media

Students continue to use a huge variety of social media. Snapchat is being used on a daily basis by 71% of respondents (up from 65% in 2016) whilst Instagram is used by 68% (up from 59%) and Youtube at 66% (up from 59%). Facebook remains a popular platform but has fallen by 6% from 66% in 2016 to 60% in 2017. The 2017 findings highlight the importance of your institution being across all platforms.

HOW OFTEN DO YOU USE SOCIAL MEDIA?

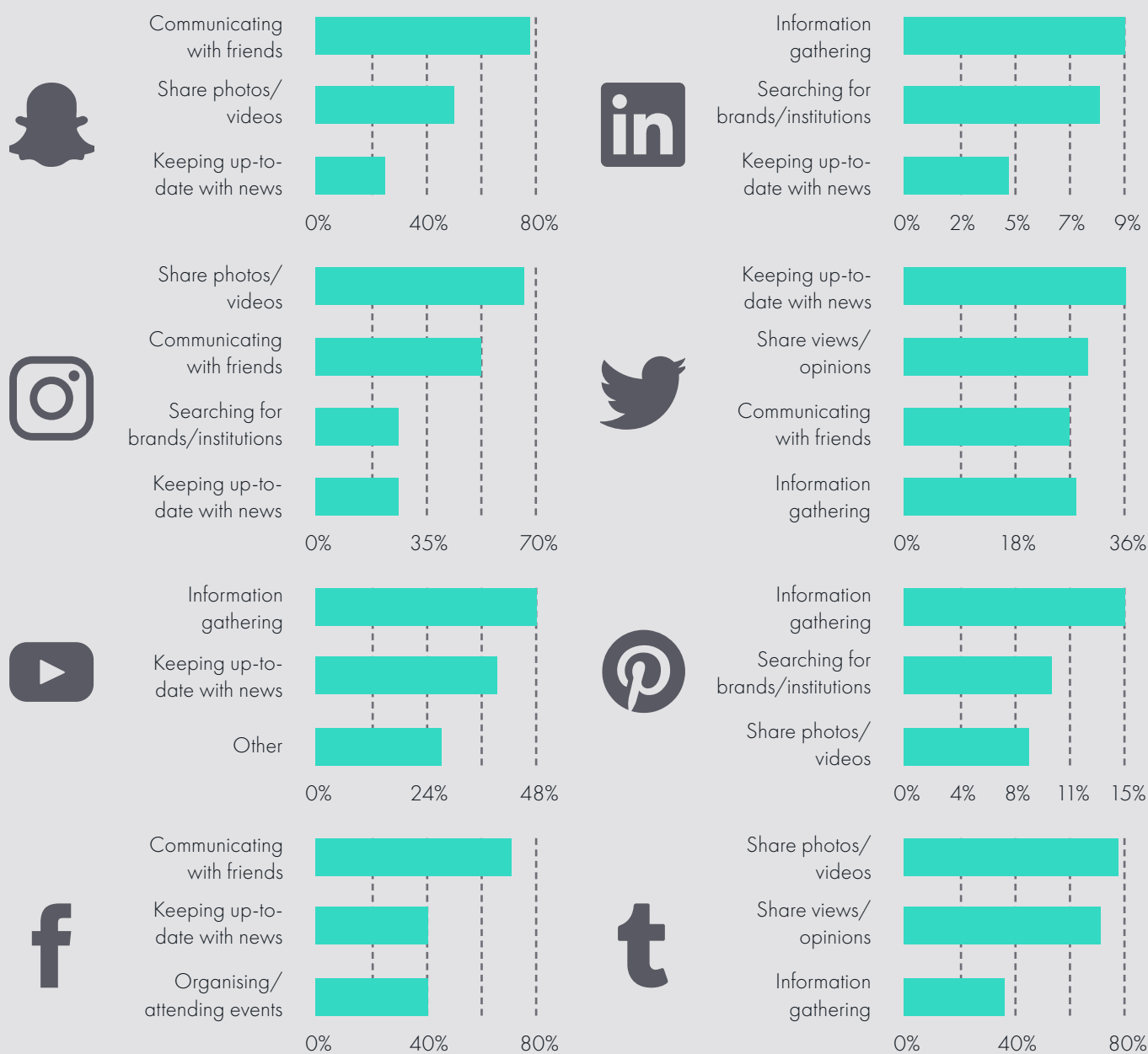


Understand how your audience are using and engaging with your social media sites by conducting Google Analytics audits to understand where your traffic is coming from. Use a social benchmarking tool like Edurank to understand what content is working and how that compares to similar institutions and institution types. Independent panel research and deep-dive qualitative surveys with your own students can further inform your strategy.

Section 1: Social Media

Respondents' predominant use of Snapchat for communicating with friends further highlights its importance - when coupled with the finding that friends are a key influencer on HEI choice, Snapchat has the potential to be a powerful tool for student recruitment.

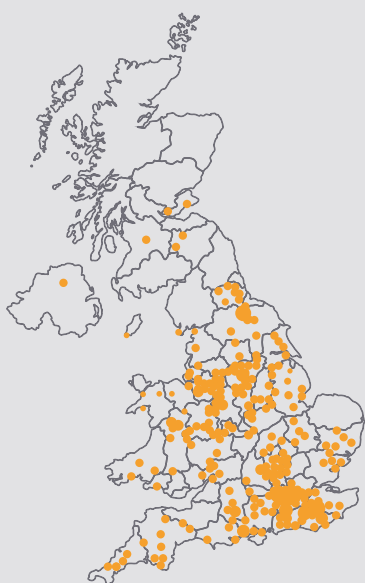
WHAT DO YOU USE EACH OF THESE PLATFORMS FOR?



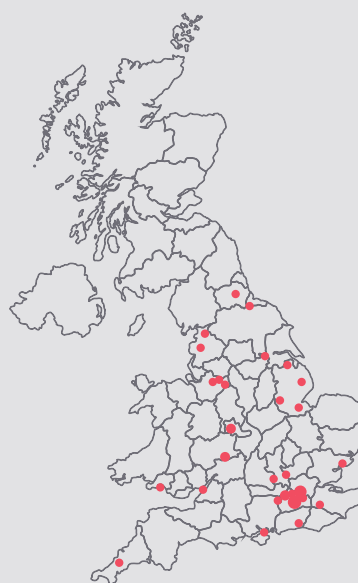
Section 1: Geography

Students from across the UK took part in the National Clearing Survey 2017, although the majority were in England, reflecting the HEIs who participated in the survey. Within England, the highest numbers of respondents were in the south east and north west, reflecting the country's population.

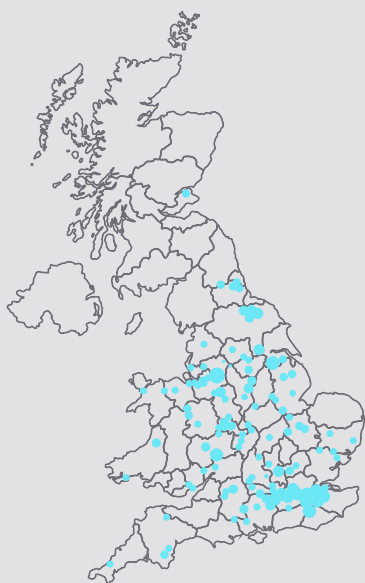
The Traditional Clearing Student



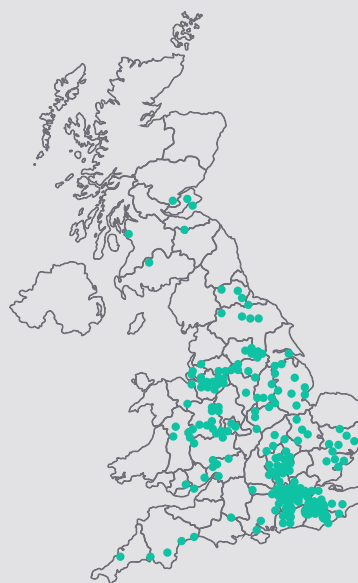
The Adjustment Student



The Mind Changer



The Direct Applicant



SECTION 2.

Student and institution activity prior to Results Day



Section 2

To understand the Clearing journey it is important to recognise the activity that happens prior to the students receiving their results, both by the students themselves and by Higher Education Institutions.

Pre-Clearing can be defined as between 15th January 2017 (UCAS priority application deadline) to 15th July 2017 (Clearing opens on UCAS).

THIS SECTION EXPLORES:

- **The original institutions that respondents applied to through UCAS**
- **Brand awareness levels that respondents have of their Clearing institution**
- **Student engagement with their Clearing institution prior to Results Day**
- **Prospectus downloads**
- **Prior research into the Clearing process conducted by students**
- **Decision making before Results Day**
- **The level of support and information given to students by Colleges and Sixth Forms about Clearing options and the process**

Section 2: Key Findings

1

61% of respondents did not include their Clearing institution as one of their original five UCAS choices. Higher Education Institutions can therefore influence a student's Clearing choice after the original application deadline.

2

81% of students had heard of their chosen Clearing institution prior to A-level Results Day, highlighting the importance of brand awareness campaigns in the pre-Clearing period.

3

Friends accounted for 22% of introductions with their destination Higher Education Institution this year. Friends are most influential to the Direct Applicant, accounting for a quarter of introductions.

4

"How the Clearing process works" (63%) and "When Clearing opens" (49%) are still the two most popular searches in pre-Clearing research. Marketers can create keyword rich, relevant content on these topics for their websites to attract Clearing candidates.

5

Just 36% of students visited an open day at their Clearing destination, but 69% visited the website prior to A-level Results Day.

6

Students are slightly more likely to register their details on the institution's website (48%) than download a prospectus (45%). Data-capture (and how that data is used) presents an opportunity for Higher Education Institutions to form their own audience profiles during pre-Clearing.

7

84% of respondents had a "Very positive" or "Positive" view of their destination institution upon first hearing of the brand.

8

Whilst just under 80% of research occurs on or after the end of the A-level exam period, a significant 20% of research occurs before May. Ensure your Clearing information and opportunities are planned and published early to take advantage of these early researchers.

9

58% of Traditional Students do not know which institution they are going to apply for through Clearing on A-level Results Day. This demonstrates the largest representative group is still completely undecided on the morning of collecting their results.

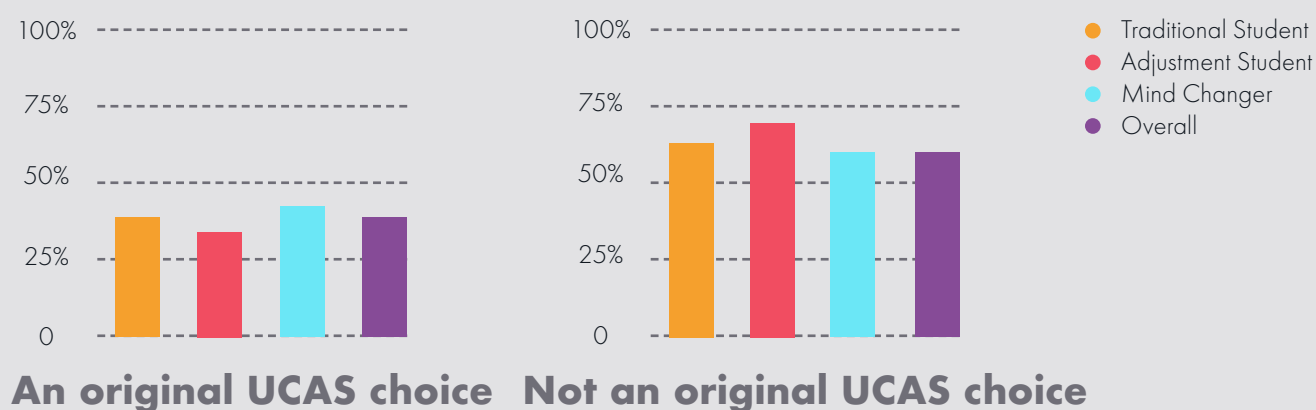
Section 2: The Application

All students in the Traditional Student, Adjustment and Mind Changer profiles had previously applied for a university, while those in the Direct Applicant profile had not.

The National Clearing Survey asked which five Higher Education Institutions students originally applied to through UCAS and if their Clearing institution was one of their original five choices. Almost two thirds (61%) did not pick their Clearing institution as one of their five original UCAS choices, down from 67% in 2016.

Among Adjustment Students and Traditional Students we observe the highest percentages (68% and 64% respectively) of non-original choices.

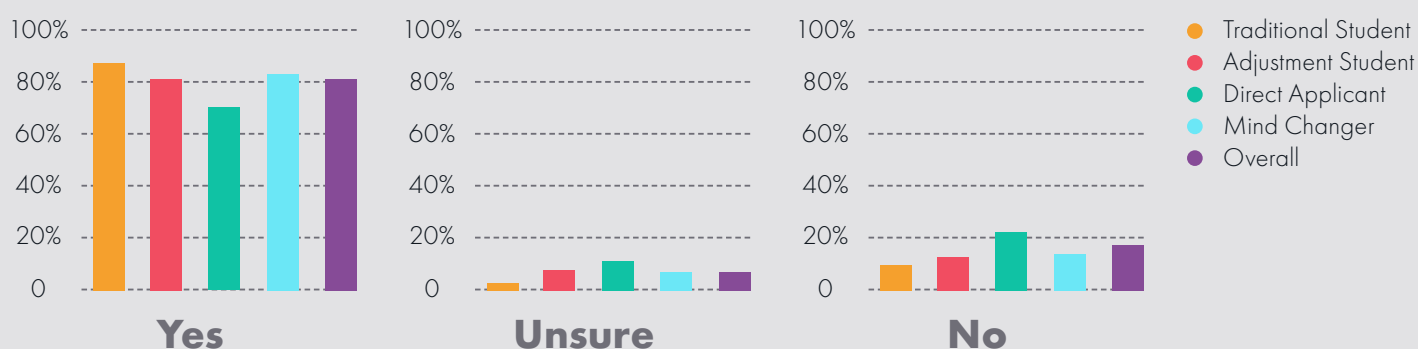
WAS YOUR CLEARING INSTITUTION ONE OF YOUR ORIGINAL FIVE CHOICES?



Section 2: Awareness

The National Clearing Survey asked “Where did you first hear about the institution?”. The data revealed that the majority of Clearing students elected to enrol at institutions outside of those initial UCAS choices. However, 81% of students had heard of their final destination, down from 85% in 2016.

HAD YOU HEARD OF THE INSTITUTION YOU ENROLLED AT THROUGH CLEARING PRIOR TO RESULTS DAY?



This emphasises the importance of brand awareness in the pre-Clearing period. The Direct Applicant is least likely to have heard of their institution, but even among this group we see that 71% of them had awareness.

Section 2: Awareness

Friends were once again cited as the most common introduction to students' destination providers and were most influential to the Direct Applicant, accounting for almost one in four of all referrals.

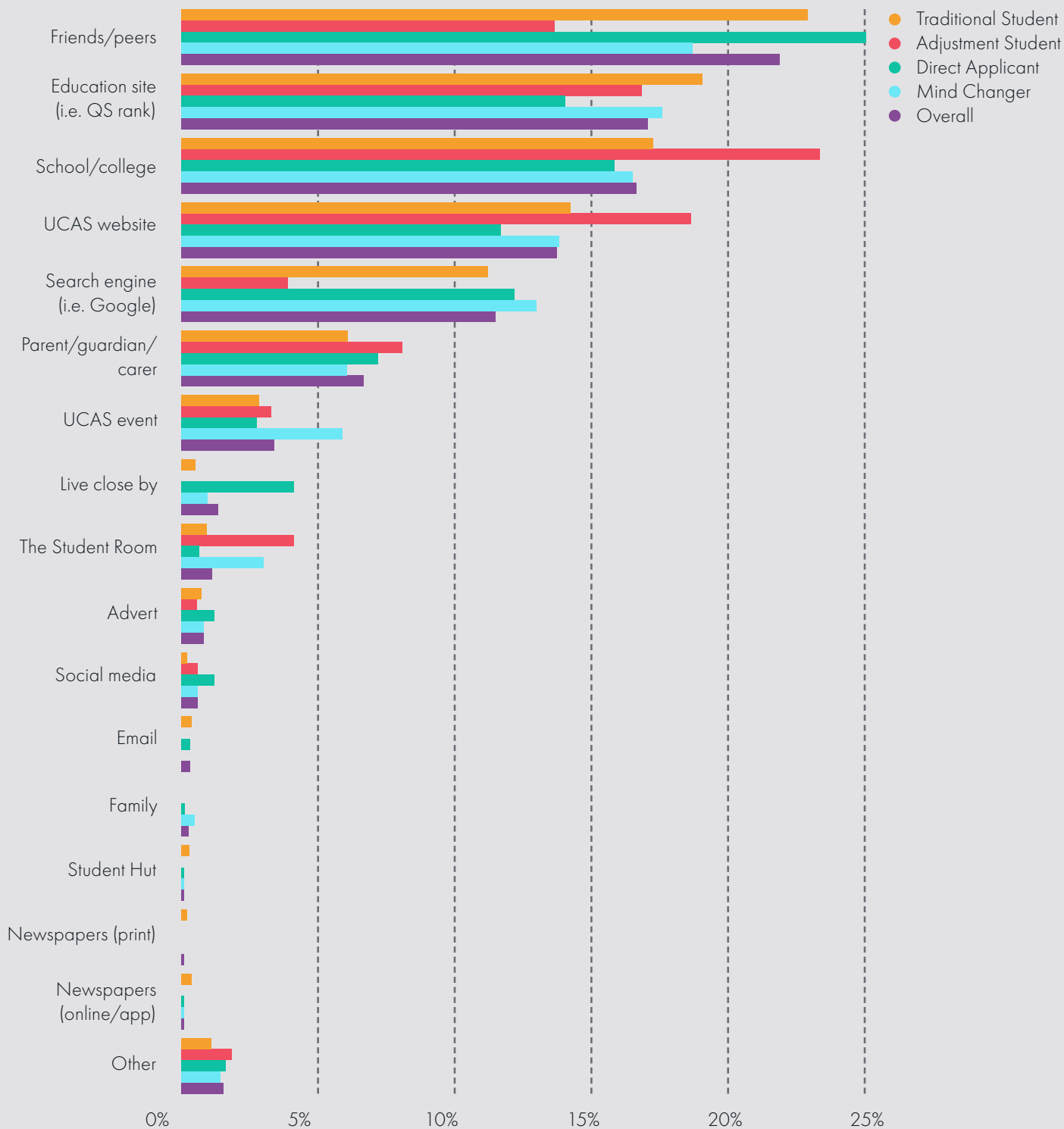
The next largest referrer overall was 'Education sites' at 17.2% and 'School/College' at 16.5%. However, when you look at the different profile groups, there are some interesting differences to note. For example, The Adjustment Student is far more likely to be introduced to their destination institution by a school or college than any other group, 23% in 2017 compared to the 17% overall average.

Coupled with the knowledge that students communicate with their friends on a daily basis using the platforms demonstrated earlier in the report, this provides a powerful insight into the channels that marketers can utilise in order to reach not only targeted students, but also some of their key influencers.

Additionally, this finding points to the importance of clear course listings on UCAS and directories and the need to ensure that relevant teachers, careers advisers and staff are considered in campaign planning.

Section 2: Awareness

WHERE DID YOU FIRST HEAR ABOUT THE INSTITUTION?



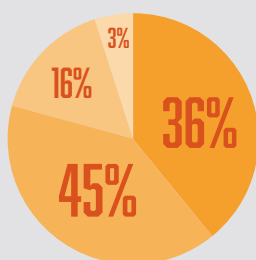
Section 2: Initial Perceptions

This year we also asked students about their perception of brand, in order to gauge whether students were influenced by positive reputation. Most students had positive initial impressions of their Clearing choice, with the Adjustment Student the most likely to experience strong feelings of positivity. The Mind Changer was the least likely to feel positive about their choice.

The prevalence of positive sentiments indicates that students feel empowered about the Clearing process and the options within it, rather than viewing it as a negative way to achieve a university place. This supports the idea that Clearing is increasingly a buyer's market. It also highlights the increased importance of long-term, brand driven Clearing marketing strategies for providers to ensure that you are front of mind and viewed as a positive choice for students through Clearing.

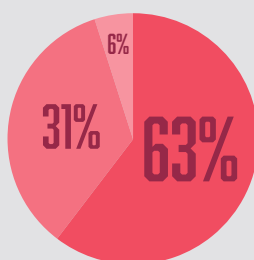
HOW DID YOU PERCEIVE YOUR CLEARING INSTITUTION WHEN YOU FIRST HEARD OF THEM?

TRADITIONAL STUDENT



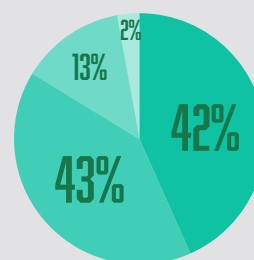
- Very positive
- Positive
- Neutral
- Negative
- Very negative

ADJUSTMENT STUDENT



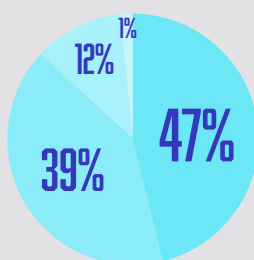
- Very positive
- Positive
- Neutral
- Negative
- Very negative

DIRECT APPLICANT



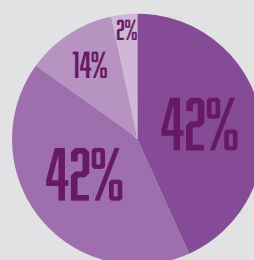
- Very positive
- Positive
- Neutral
- Negative
- Very negative

MIND CHANGER



- Very positive
- Positive
- Neutral
- Negative
- Very negative

OVERALL



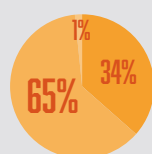
- Very positive
- Positive
- Neutral
- Negative
- Very negative

Section 2: Initial Perceptions

Students were asked if they had visited their Clearing destination prior to A-level Results Day. Just 36% of students had visited their Clearing destination in person. Across all of our profile groups, we found a decrease in the number who visited their destination institution prior to A-level Results Day.

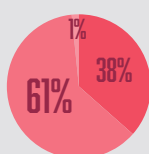
DID YOU VISIT THE INSTITUTION PRIOR TO RESULTS DAY?

TRADITIONAL STUDENT



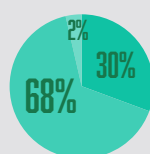
● Yes
● No
● Unsure

ADJUSTMENT STUDENT



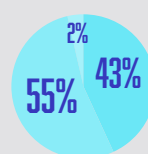
● Yes
● No
● Unsure

DIRECT APPLICANT



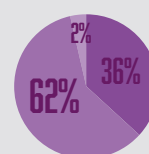
● Yes
● No
● Unsure

MIND CHANGER



● Yes
● No
● Unsure

OVERALL



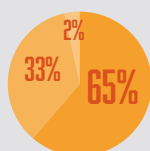
● Yes
● No
● Unsure

Broken down by profile group, we see that institution visits have decreased by four percentiles (from 65% in 2016) by the Traditional Clearing Student, seven percentiles (from 54% in 2016) by The Adjustment Student, ten percentiles (from 58% in 2016) by The Direct Applicant and three percentiles (from 52% in 2016) by The Mind Changer.

This reinforces the findings in 2016 and identifies a long-term trend that primary research is moving away from the traditional open day visit to other means.

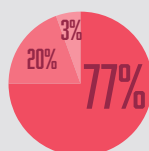
DID YOU VISIT THE INSTITUTION'S WEBSITE PRIOR TO RESULTS DAY?

TRADITIONAL STUDENT



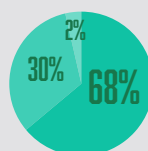
● Yes
● No
● Unsure

ADJUSTMENT STUDENT



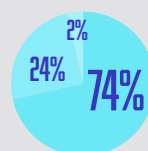
● Yes
● No
● Unsure

DIRECT APPLICANT



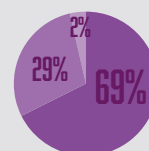
● Yes
● No
● Unsure

MIND CHANGER



● Yes
● No
● Unsure

OVERALL



● Yes
● No
● Unsure

Section 2: Initial Perceptions

The majority (69%) of Clearing students visited the HEI's website prior to A-level Results Day, indicating that students' primary research has moved away from the traditional open day visit, with a greater focus and resource being placed online. The most likely group to visit an institution's website is the Adjustment Student (77%).

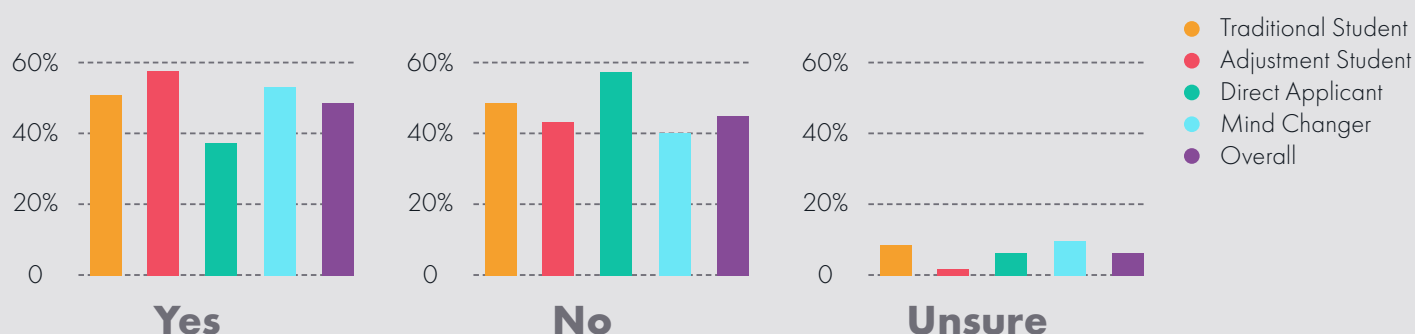
With online research becoming more prevalent, the challenge for Higher Education marketers is how to use online assets to generate content that engages the user and helps convey the university experience through the screen.

Section 2: The Prospectus

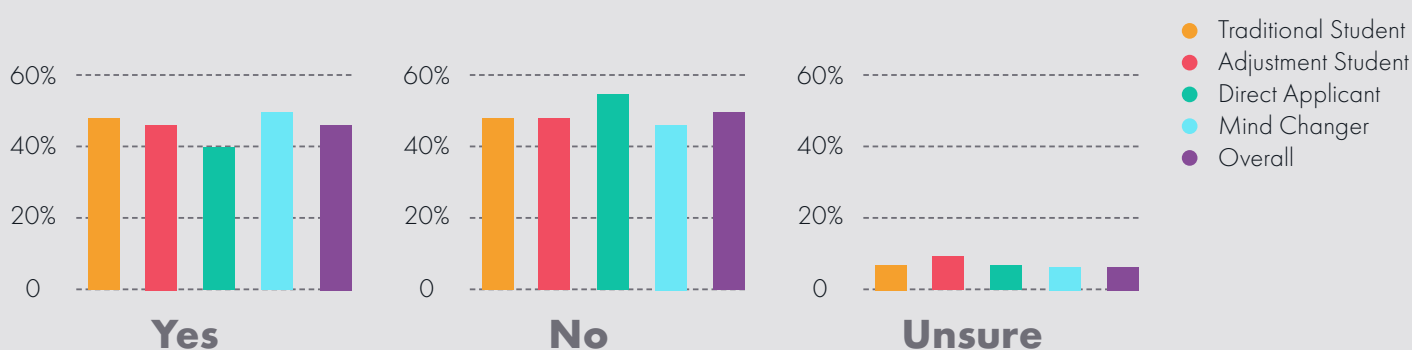
Students were asked if they downloaded (or requested) a prospectus and if they had registered their details with the institution.

Clearing students are slightly more likely to register their details online than download a prospectus. Students' willingness to register with Higher Education Institutions that interest them means that you should not shy away from asking for this data (in a GDPR compliant manner) and provide registration opportunities to register throughout your marketing touchpoints. This data would be valuable not only for nurturing interested students and identifying influencers, but also for building custom and lookalike audiences for advertising campaigns and beyond.

DID YOU REGISTER YOUR DETAILS WITH THE INSTITUTION?



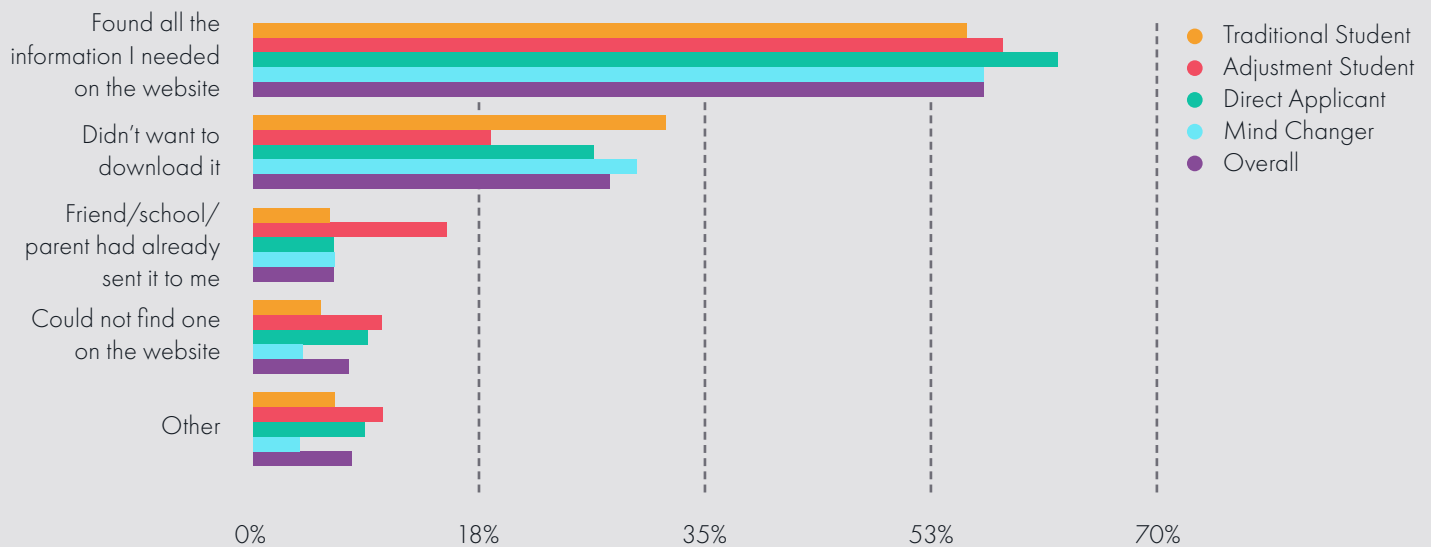
DID YOU DOWNLOAD OR REQUEST A PROSPECTUS?



Section 2: The Prospectus

This year we explored the motivations for not downloading a prospectus. The top reason cited was that the prospectus wasn't deemed necessary because respondents were able to find the relevant information on the website. This reinforces the need for strong online content.

WHY DIDN'T YOU DOWNLOAD A PROSPECTUS?

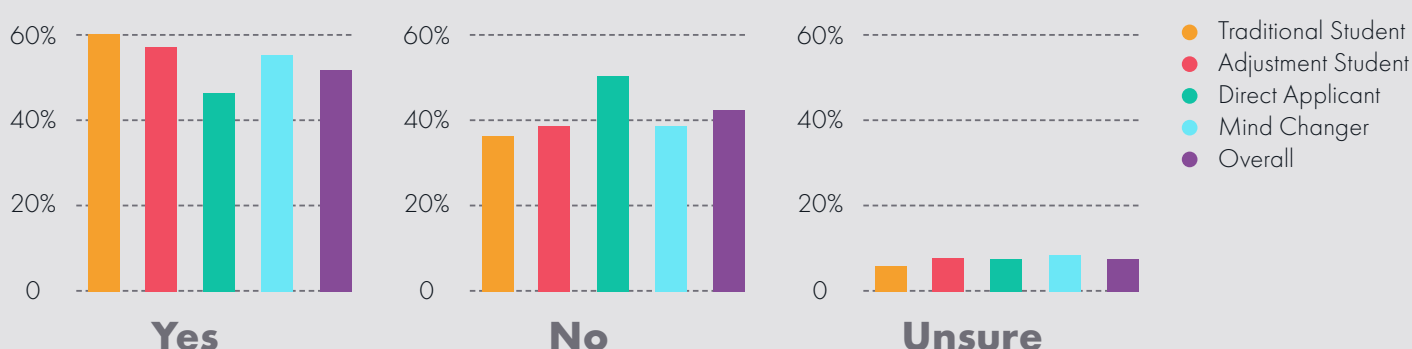


Section 2: Research

Students were asked if they had conducted any research about Clearing prior to A Level Results Day (18/8/17), and if so, when they started their research.

Overall, 55% conducted some research prior to collecting their results, a decrease of 5% from 2016.

DID YOU CONDUCT ANY RESEARCH ABOUT CLEARING PRIOR TO A-LEVEL RESULTS DAY?



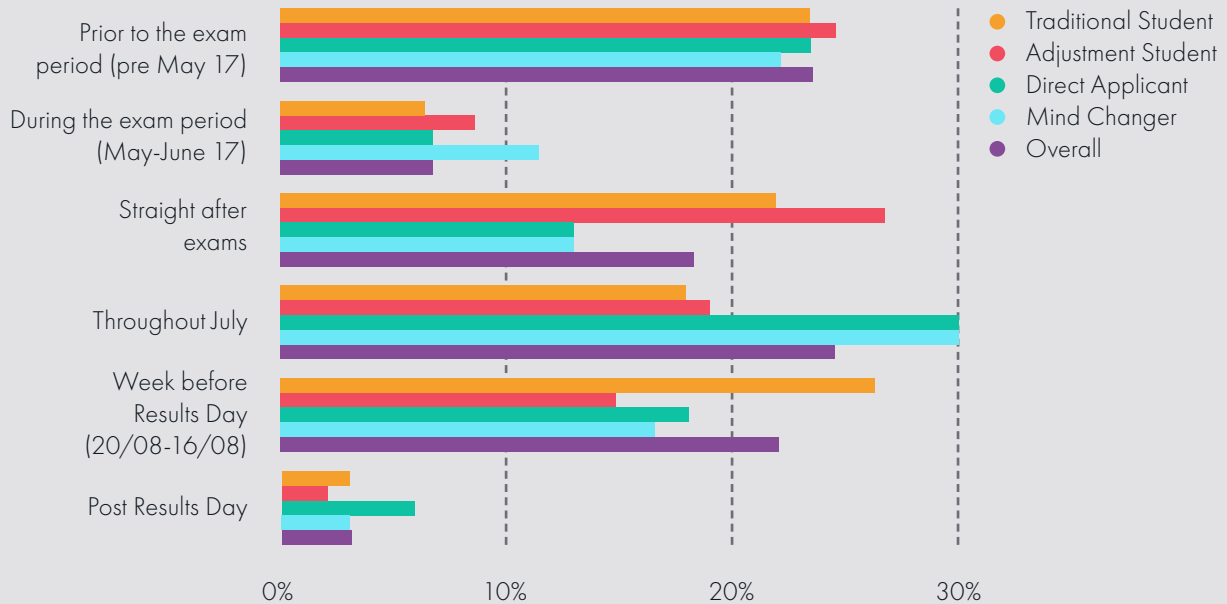
There is a change in behaviour from 2016 to 2017, which sees research starting even earlier. The Traditional Student (19%) and the Adjustment Student (24%) begin their research before May, again reinforcing the need for strong brand presence and early Clearing information where possible.

This finding also highlights an opportunity to begin early data capture - especially if detailed Clearing information is not available far in advance of A-level Results Day - with opportunities for direct marketing and re-marketing available as this information is confirmed.

This, combined with the insights above, can be used to determine both the timing and content of campaigns. Savvy marketers can position their institution as Clearing experts, providing information not only on their courses and entry requirements, but also the key processes and timeframes that students need to know in order to successfully and painlessly navigate Clearing. (Please see following for a breakdown of information by Clearing profile).

Section 2: Research

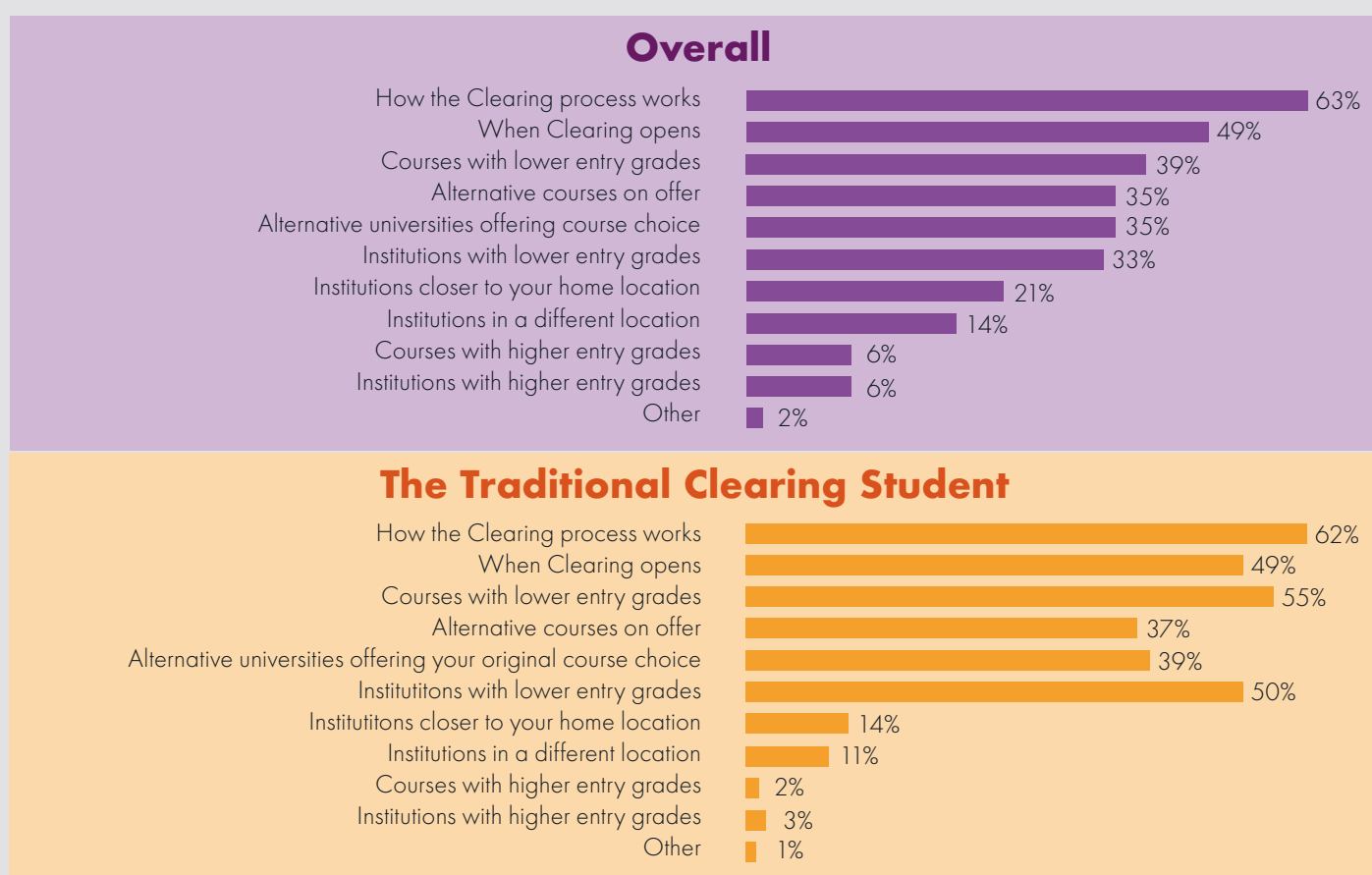
WHEN DID YOU START RESEARCHING?



Section 2: Search History

The 55% of students who stated that they carried out research prior to A-level Results Day were then surveyed on the type of information that they specifically looked for during their research. Students could select more than one option in the survey. Overall, 'How the Clearing process works' at 63% (down from 65% in 2016) and 'When Clearing opens' 49% (down from 51% in 2016) were the two most popular search terms overall.

WHAT INFORMATION DID YOU LOOK FOR PRIOR TO RESULTS DAY?



However, when we break this down by profile group, we see some interesting differences and search behaviours which can help shape your long-term content strategy.

The Traditional Clearing Student, in line with the overall findings, searches for 'How the Clearing process works' (62%, down from 66% in 2016) and 'When Clearing opens' (49%, down from 51% in 2016).

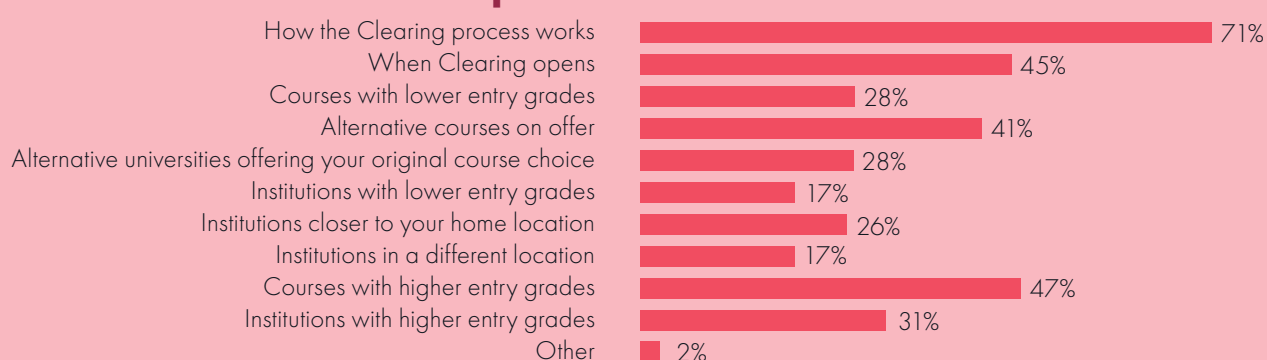
The Adjustment Student searched for 'How the Clearing process works' (71%, up from 62% in 2016) whilst the second most popular search was 'Courses with higher entry grades' at 47% (up from 36% in 2016).

Section 2: Search History

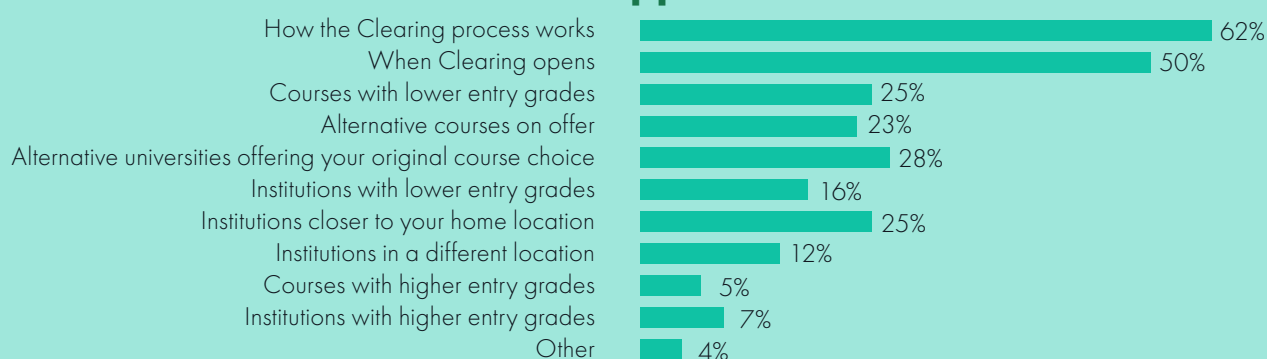
Direct Applicants most commonly searched for 'How the Clearing process works' (62%, down from 71% in 2016) and 'When Clearing opens' (50%, down from 57% in 2016). However, while these terms saw a reduction in use, there was growth in other areas, most notably 'Courses with lower entry grades' (25%, up from 14% in 2016) 'Alternative universities offering my original choice' (28%) was also a popular term amongst this group.

The Mind Changer was broadly reflective of the findings in 2016, with each search term only changing by a couple of percentiles.

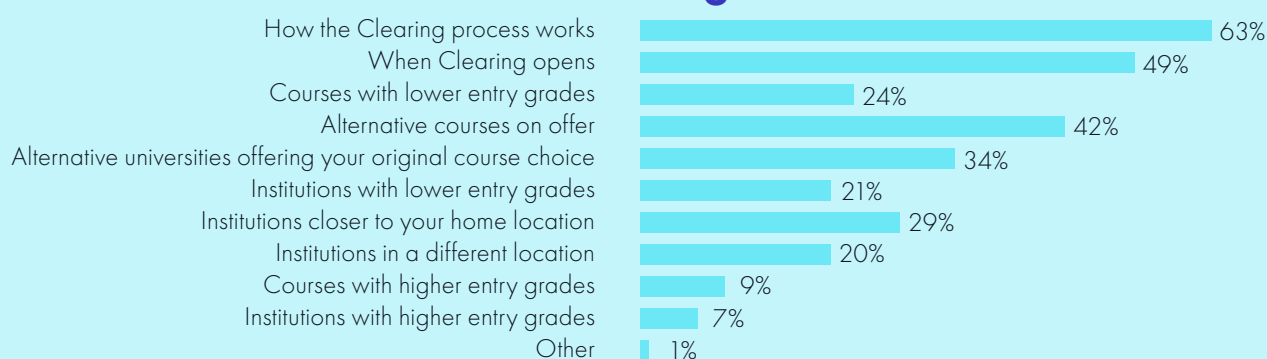
The Adjustment Student



The Direct Applicant

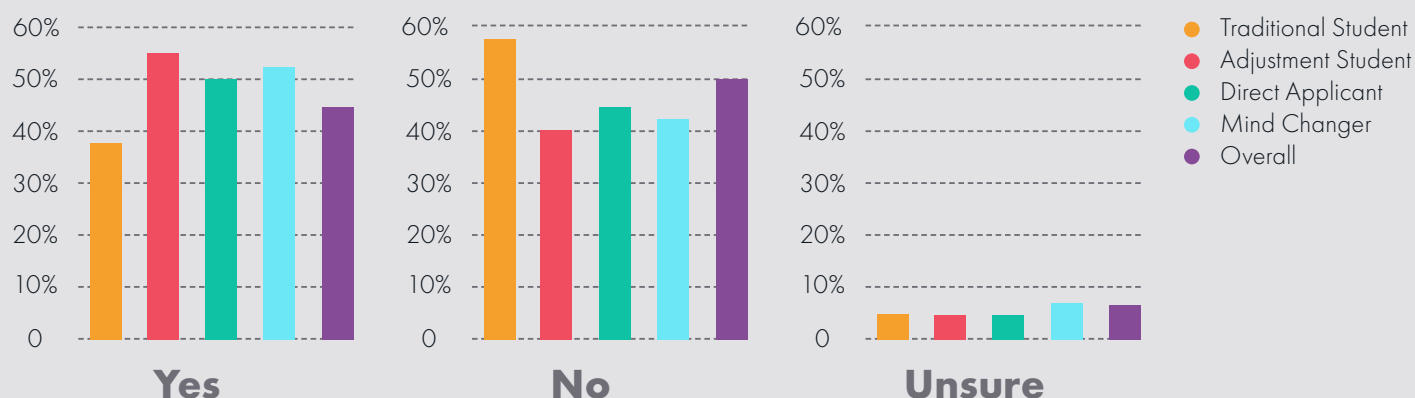


The Mind Changer



Section 2: Research

HAD YOU ALREADY DECIDED WHICH INSTITUTION(S) TO APPLY TO PRIOR TO RESULTS DAY?



Just over half of students (51%) were undecided about which institution they wanted to apply to prior to A-level Results Day.

The Adjustment Student was the most likely to know where they were going to apply (55%), which is a similar figure to the Mind Changer (52%) and the Direct Applicant (50%). Only 38% of the Traditional Clearing Students knew where they were going to apply prior to A-level Results Day.

The Adjustment Student is more prepared, and more likely to know where they wanted to go, while the Traditional Student was the least likely. We can speculate that this perhaps reflects the circumstances of each of these groups; the Adjustment Student, who has achieved higher grades, may have considered a different institution in their initial research but had either not achieved an offer, based on their predicted grades, or felt that the grade boundaries were too high for them to achieve so may not have applied there at all. The Traditional Student, conversely, has under-achieved on their results and may have been taken by surprise by this and therefore not made any decisions about alternative places, or may not be made an offer at any of their preferred alternatives due to their grades.

SECTION 3.

Student and institution activity during and after Results Day



Section 3

This section focuses on the processes students went through once they had received their results and up to, but not inclusive of, when they secured their place.

This section presents ways in which Higher Education Institutions can maximise their opportunity to affect the decision-making process of Clearing students during this vital stage and therefore increase conversion of Clearing enquiries and applications to enrolments.

IT INCLUDES INSIGHT INTO:

- **When students received their results**
- **How long after they received their results students started looking for a Clearing place**
- **The first place that students searched when looking for a place through Clearing**
- **Other places that students searched during Clearing**
- **UCAS services accessed by students**
- **Devices students used when searching for a Clearing place**
- **Why students have chosen to return to education**

Section 3: Key Findings

1

By 10am on the 17/8/2016, 72% of respondents had received their results and were active in the Clearing process.

2

Overall, students are most likely to visit UCAS (42% in 2017, down from 51% in 2016) first when searching for a Clearing place. However, we do see variation across the profiles. The Direct Applicant is just as likely to go straight to an institution's website as UCAS (31% for both). Providers should put in place strong SEO and paid campaigns to ensure they appear in relevant searches during this period.

3

Less than 1% of students used print newspapers first when searching for a Clearing place and only another additional 1% used them as a further source of information. Although at first glance, this seems to show that print advertising is not worth the investment, there are benefits associated with print that cannot be measured through direct return on investment, for example, prestige, market positioning or even brand awareness with parents, who are key influencers.

4

When broken down into profiles, all groups aside from Adjustment Students had an overall preference for using desktop as their primary search device. Almost two-thirds (61%) of students used mobiles on their own, or in conjunction with other devices when searching, a decrease from last year. Used in isolation, mobile accounted for 20% of searches, which is an increase of 3% from last year. Make sure you have dedicated tactics for mobile search and a cross-device strategy to reflect the modern search behaviour of a Clearing student.

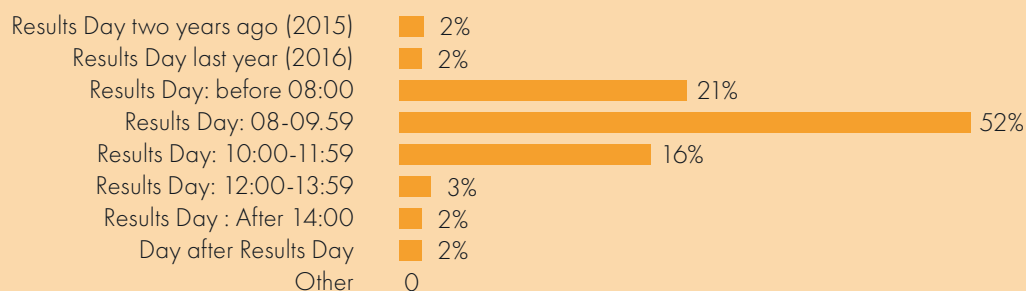
5

This year we looked at advertising in order to identify any messaging which resonated with students during campaigns. We discovered that students were unlikely to remember any taglines from advertising, but for those that did there was significant recall of brand.

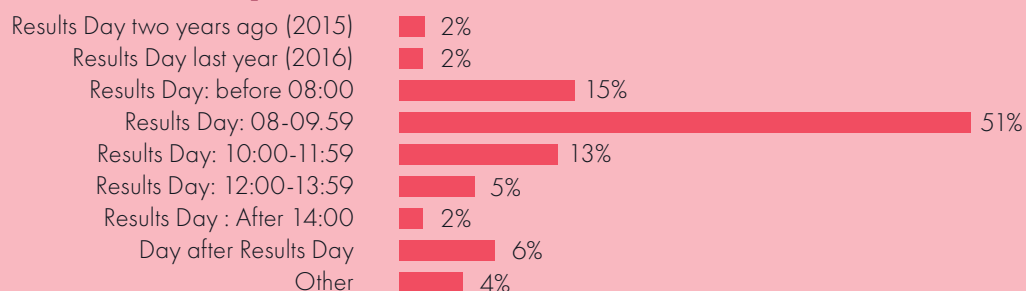
Section 3: Results Day

WHEN DID YOU RECEIVE YOUR RESULTS?

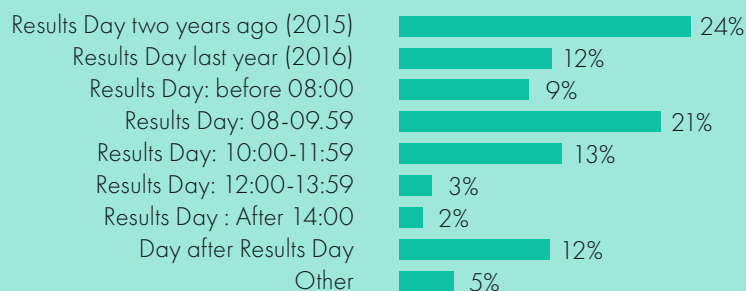
The Traditional Clearing Student



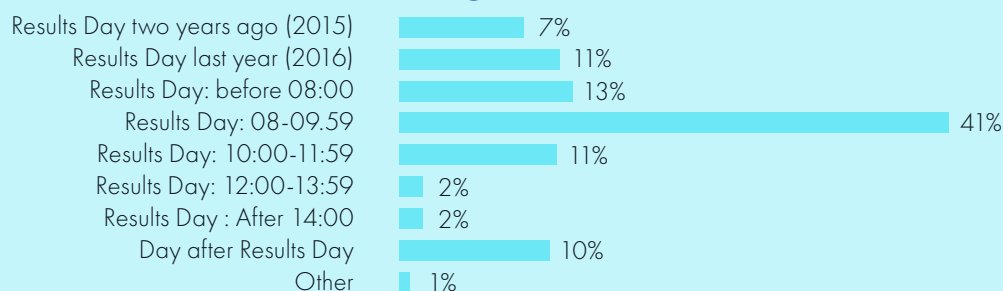
The Adjustment Student



The Direct Applicant



The Mind Changer

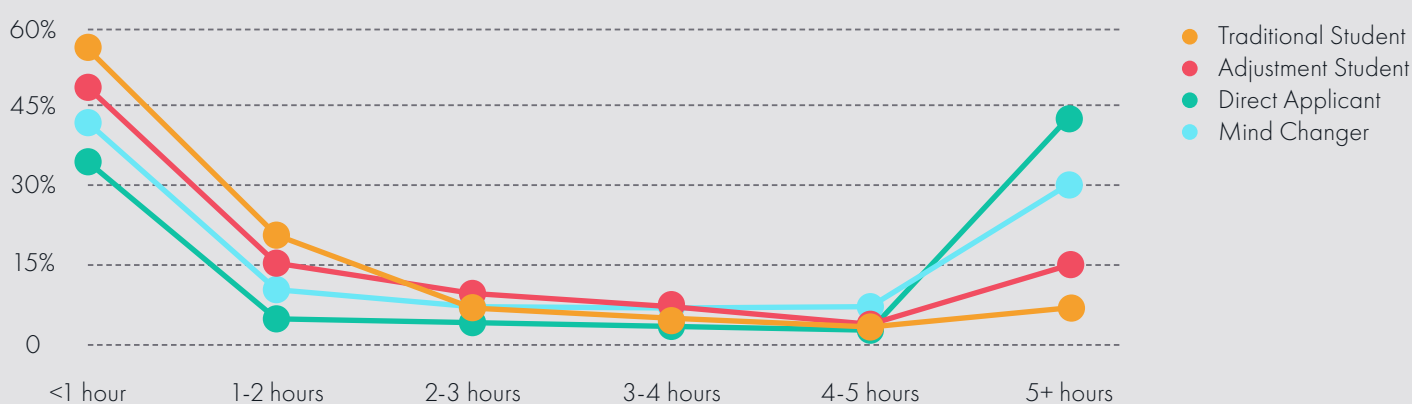


Section 3: Results Day

This year, 72% of students had received their results by 10am on A-level Results Day (inclusive of Direct Applicants and BTEC and IB students), which is a slight decrease on 75% in 2016.

The Traditional Clearing Student was the quickest to collect their results, 74% having done so before 10am. The Adjustment Student in 2017, was more likely to collect their results before 10am (51%) compared to in 2016 (42%).

HOW LONG AFTER RECEIVING YOUR RESULTS DID YOU START LOOKING FOR A CLEARING PLACE?



The Direct Applicant was also collecting their results earlier than in the previous year, 30% before 10am (rising to 66% when you include 2016 and 2015), compared to 14% before 10am on the day and rising to 38% when you include back to 2015.

Within the first hour of receiving their results, 48% of students started searching for a Clearing place.

This number rises to 63% in the first two hours. An increase of two percentiles on 2016.

The Traditional Clearing Student started the quickest, with 79% searching in the first two hours. This matches the trend from the previous question, where this group were statistically likely to be the earliest to collect their results, with three quarters (77%) having them before 10am on A-level Results Day.

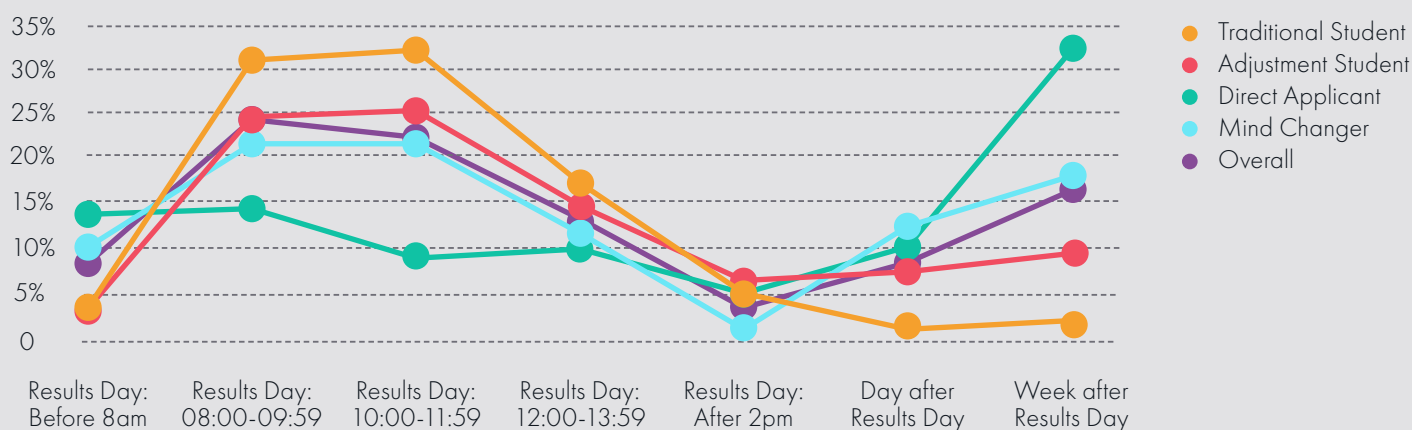
Despite the Direct Applicant being more likely to have their results in advance of A-level Results Day, they are not so quick to be searching as the other groups. This perhaps reflects that Clearing is a slightly different process for this group.

Section 3: Timing

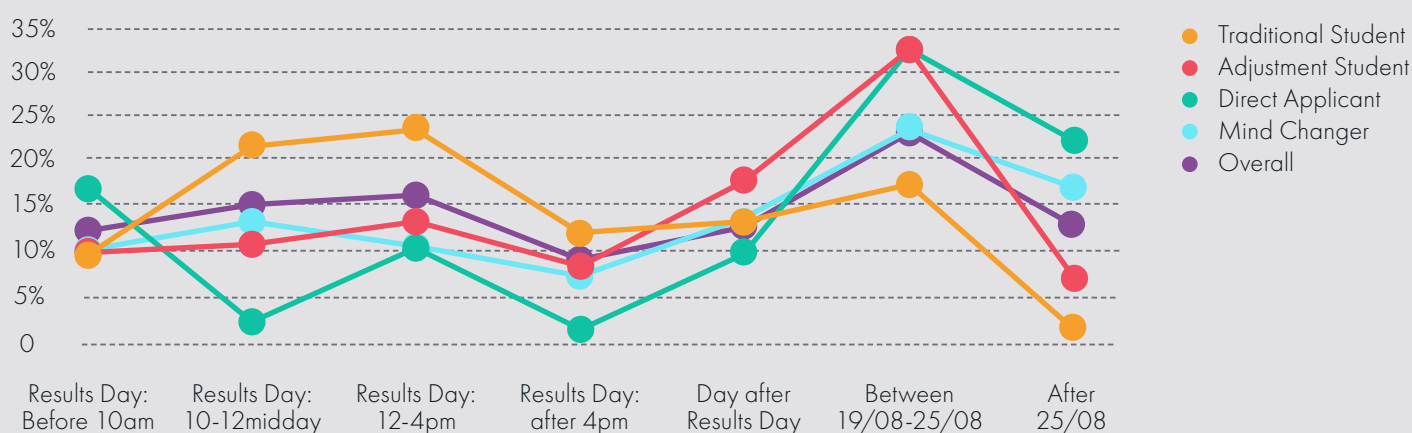
We asked our respondents when they contacted the first institution. Just over half (54%) of students contacted institutions before midday on A-level Results Day, with the same amount securing their place at this time. The Direct Applicant again showed the most difference, contacting institutions much later than the other groups.

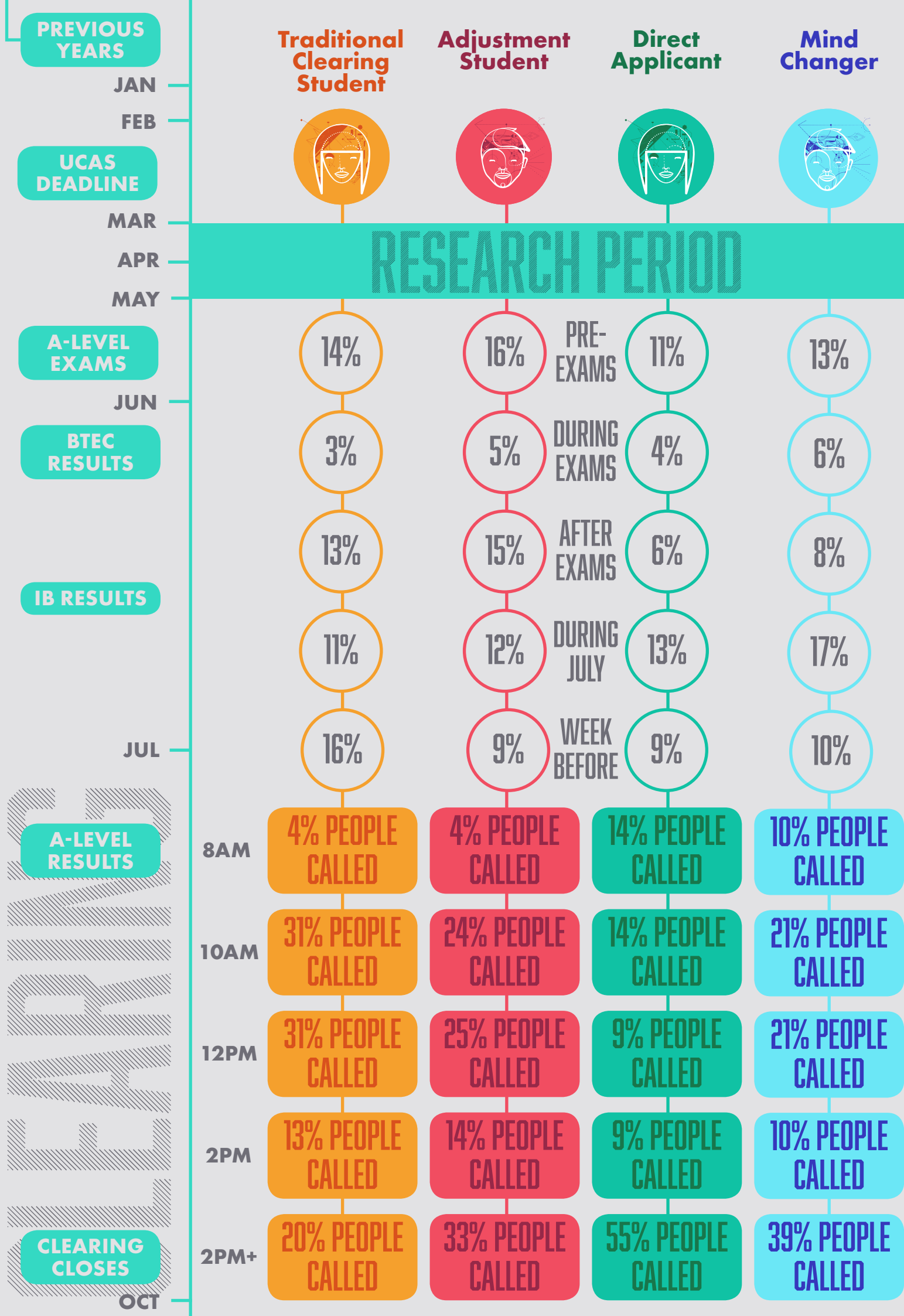
53% of students secure their place on Results Day, leaving 47% to secure their place afterwards. The Traditional Student is more likely to secure their place on Results Days compared to the other groups, while the Direct Applicant is least likely. Again, this reinforces the different journey that Direct Applicants are on compared to the other groups.

WHEN DID YOU CONTACT THE FIRST INSTITUTION?



WHEN DID YOU SECURE YOUR CLEARING PLACE?

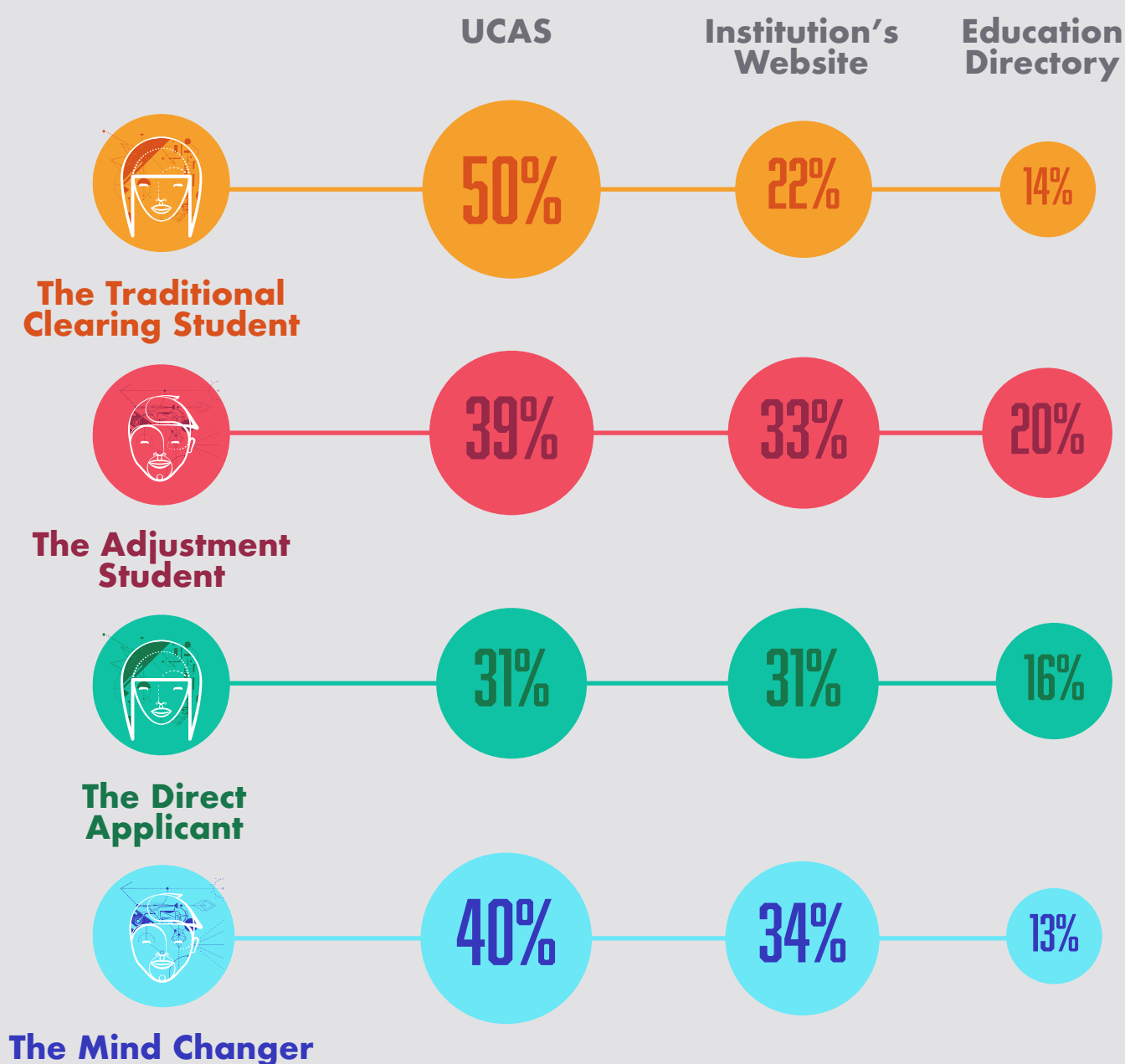




Section 3: Search Platforms

Under half of respondents overall (42%) first visited UCAS after receiving their results (down from 51% in 2016) followed by institution's website at 28% (up from 24% in 2016) and Education Directory Sites at 14%.

WHERE WAS THE FIRST PLACE YOU SEARCHED FOR A CLEARING PLACE AFTER RECEIVING YOUR RESULTS?

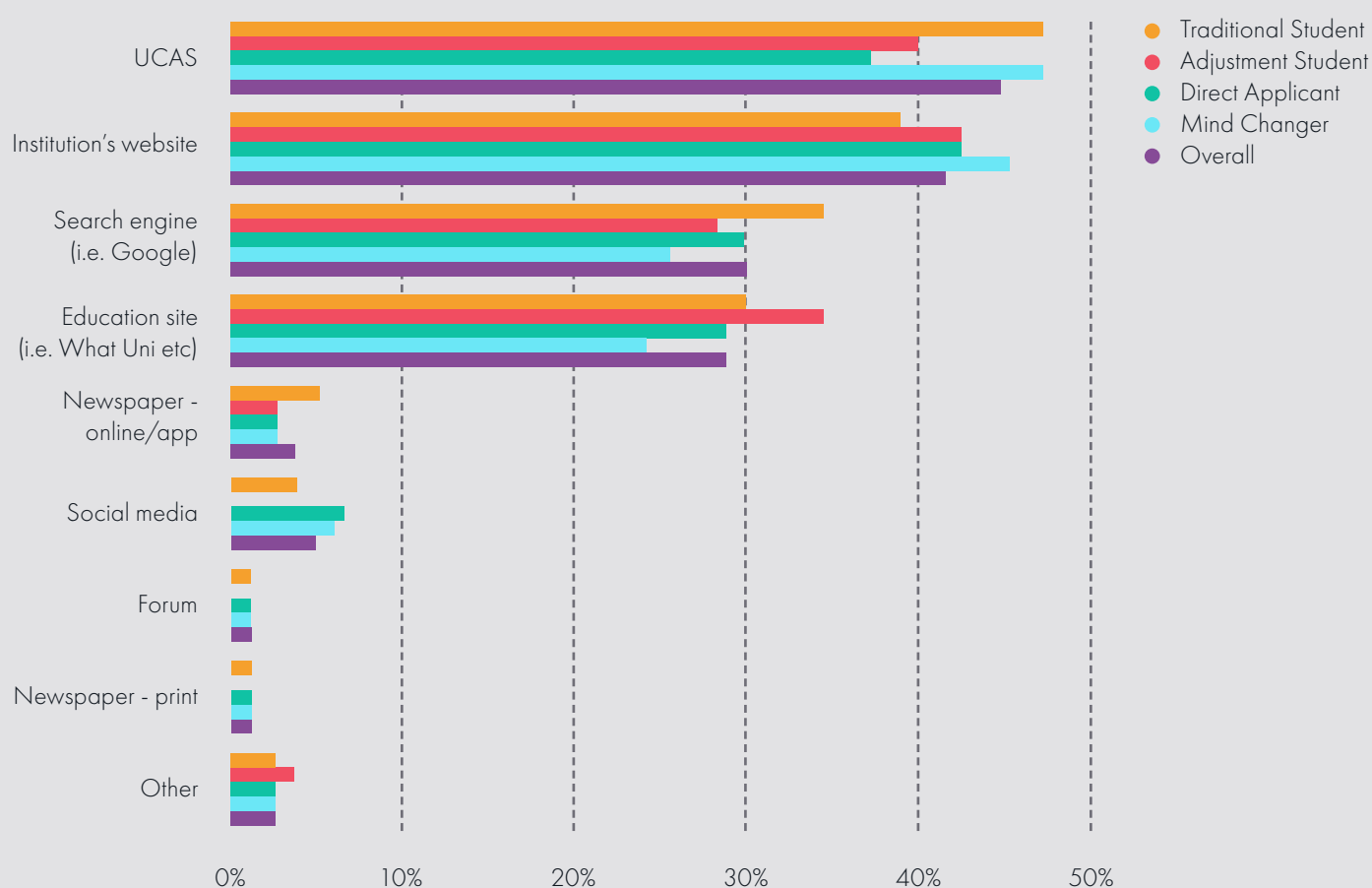


Section 3: Search Platforms

UCAS was the favourite primary destination for all profiles, but it was most popular with the Traditional Clearing Student (50%). The Traditional Clearing student was also least likely to visit institutional websites first. This highlights the importance of detailed and accurate UCAS listings for HEIs recruiting Traditional Clearing Students.

Students were then asked where else they looked for a Clearing place after receiving their results. UCAS remained the most popular destination, and 30% of students use search engines. Only 1% of students went to print news.

WHAT OTHER PLATFORMS DID YOU USE TO SEARCH FOR A CLEARING PLACE AFTER YOU HAD RECEIVED YOUR RESULTS?

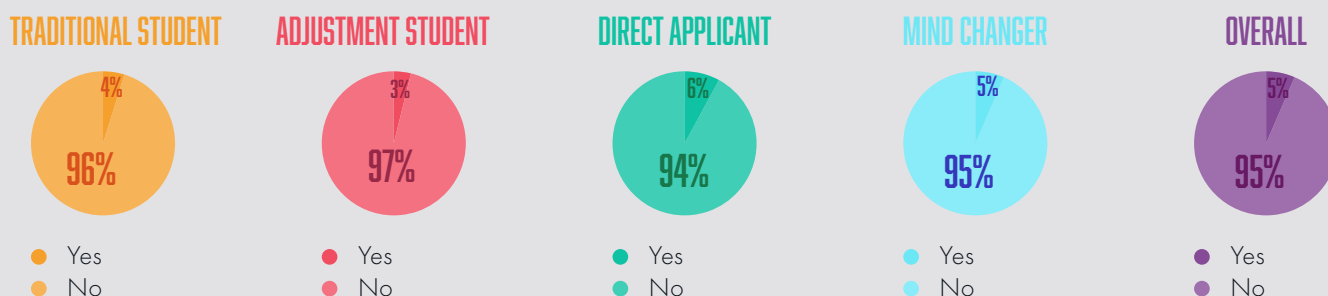


Section 3: Advertising

This year we included questions which looked into advertising messages in order to identify whether tag lines or slogans stayed with respondents after the campaigns had ended. We discovered that students were unlikely to remember any particular tagline from advertising. However, the Direct Applicant is marginally better at recall.

CAN YOU REMEMBER A TAGLINE/SLOGAN FROM ANY ADVERTISING YOU SAW FROM YOUR CLEARING UNIVERSITY?

(ADVERTISING COULD BE ON ANY PLATFORM SUCH AS FACEBOOK, LINKEDIN, NEWSPAPERS, GOOGLE SEARCH)



This word cloud shows the words and phrases that received the highest recall amongst respondents:



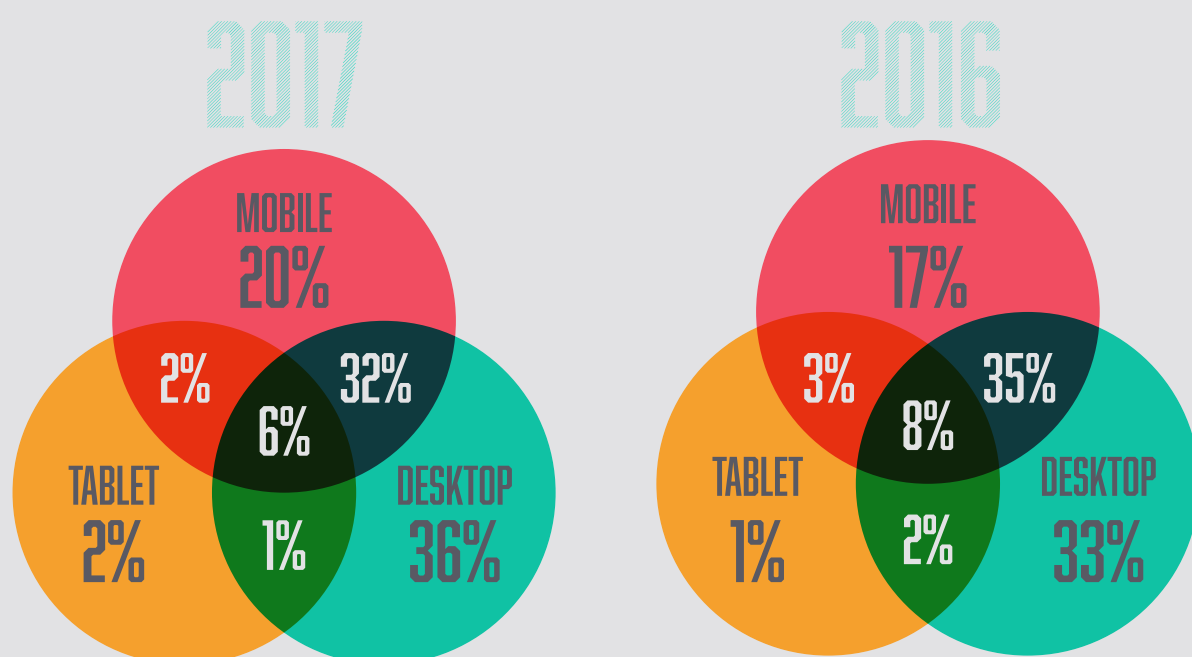
Section 3: Device Usage

Almost two-thirds (60%) of students used mobiles when searching, a slight decrease from last year. Used in isolation, mobile accounted for 20% of searches, which is an increase of 3% from 2016.

When looking into device use, desktops were the most commonly used device, with 75% of students using them. In 2017, we see slightly lower cross-device use. Tablet use decreased from 14% to 12% across all demographics.

Despite the reduction in use of mobile and tablet, it remains important to ensure that all Clearing marketing materials are as easily accessible via mobile devices as desktop. This ensures that prospective Clearing enquirers and applicants can find all the information they need, and contact a HEI, whatever device they happen to be using. HEIs who do not optimise campaigns across all device types risk losing a Clearing student who cannot access what they need when they need it, particularly if competitor HEIs have done this successfully.

DEVICE USAGE



Make sure you have dedicated tactics for mobile search and a cross-device content and SEO strategy to reflect the modern search behaviour of a Clearing student.

Section 3: Reasons for Re-entering Education

This year we looked at the reasons that students re-enter education after two years. Reasons related to career were most prominent here, with “Career change” as the most commonly cited motivation, and “Improve employment prospects” being the third most popular reason.

The second strongest reason for reapplying was to “Change their course or university”, an action that can be taken for multiple reasons, including improved career prospects.

IF YOU RECEIVED YOUR FURTHER EDUCATION RESULTS OVER TWO YEARS AGO, PLEASE COULD YOU BRIEFLY EXPLAIN WHY YOU HAVE DECIDED TO COME BACK INTO EDUCATION?



SECTION 4.

How students secured a place



Section 4

In this section we will look at the factors surrounding how and why students secured their place with their Clearing institution.

WE LOOK SPECIFICALLY AT:

- **How many institutions students contacted before securing a place**
- **How many offers students received before making a decision**
- **Whether students enrolled at the first institution they contacted after receiving their results**
- **Whether students phoned the institution during their Clearing process and what their customer experience was like on this call**
- **Whether the Clearing place offered a foundation year**
- **The important factors for students when securing a Clearing place**

Section 4: Key Findings

1

59% of students contacted more than one institution during Clearing. Data capture, re-marketing and opt-ins should form part of your conversion strategy ahead of A-level Results Day in order to stay competitive during the student's decision-making period.

2

41% of students elect to enrol at an institution that wasn't the first one they called, an increase of 3% on 2016. This highlights that students can be persuaded to attend an HEI that may not have been their first choice through Clearing. Inbound enquiries should be traced and followed up quickly, given that the majority of students have secured their place within the first two hours of receiving their results.

3

Conversely, 55% of students go on to enrol at the first institution that they call, meaning that an engaging, action driven campaign and consistent messaging throughout the Clearing period offers a good chance of converting applicants through to enrolment. However, this is down 7 percentiles from 2016, further highlighting the increasing consumerist behaviour of Clearing students, who are willing to see what another institution can offer them before feeling pressured to secure a place.

4

The most popular method for confirming a place in Clearing was via phone call, followed by UCAS and email. 33% of students would like to confirm their place via live chat, compared to 10% who actually did so. With Clearing being more competitive than ever before, providers can give themselves the edge and increase conversions by providing this service. Track your ROI through effective goal setting and tracking in Google Analytics.

5

Staff who answered calls on Clearing hotlines were very knowledgeable about course requirements (rating 8.4 out of 10), but scored much lower on other factors such as the fit of a course or institution for a student. This reflects the 2016 findings and, again, presents an opportunity for HEIs to gain competitive advantage through training call centre staff on a broader range of information required by prospective students.

6

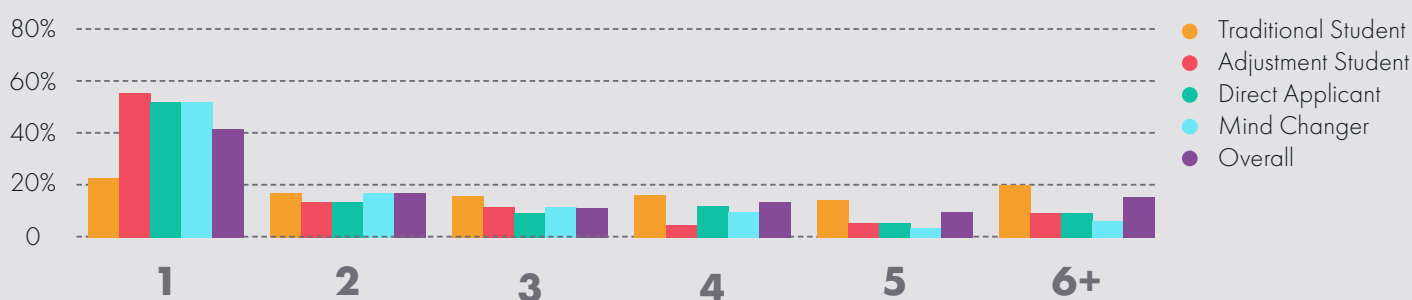
The Traditional Clearing Student is contacting on average 3.7 institutions during Clearing, (compared to 3.39 in 2016), with only 40% taking the first offer they received (down from 43% in 2016).

Section 4: University Offers

Overall, 59% of students contact more than one institution, with 41% contacting just one. The average per profile can be broken down by:

- > The Traditional Clearing Student contacted on average 3.7 institutions
- > The Adjustment Student contacted on average 2.2 institutions
- > The Direct Applicant contacted on average 2.1 institutions
- > The Mind Changer contacted on average 2.2 institutions

HOW MANY INSTITUTIONS DID YOU CONTACT DURING CLEARING?



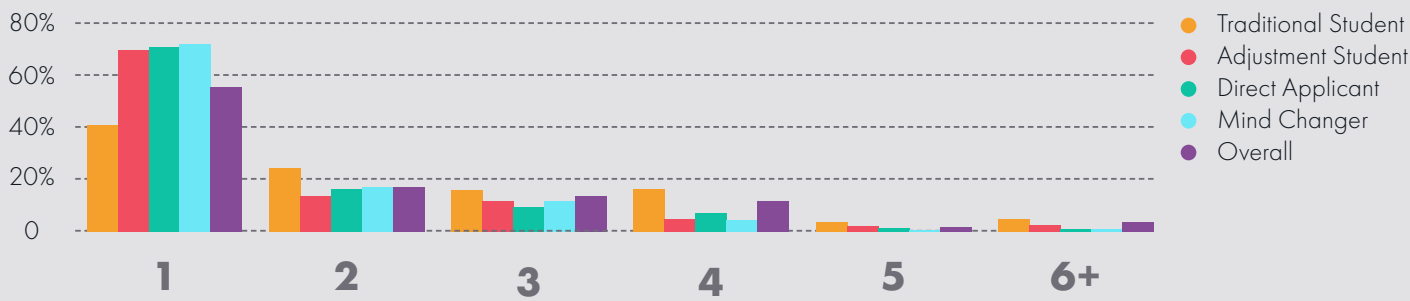
Traditional Students contacted, on average, far more institutions than the other profiles while the Adjustment Student was most likely to contact one institution.

Although 78% of Traditional Students contacted more than one institution, only 60% of them received more than one offer. The Traditional Students may be contacting more institutions as they are less likely to be made an offer by each HEI that they contact.

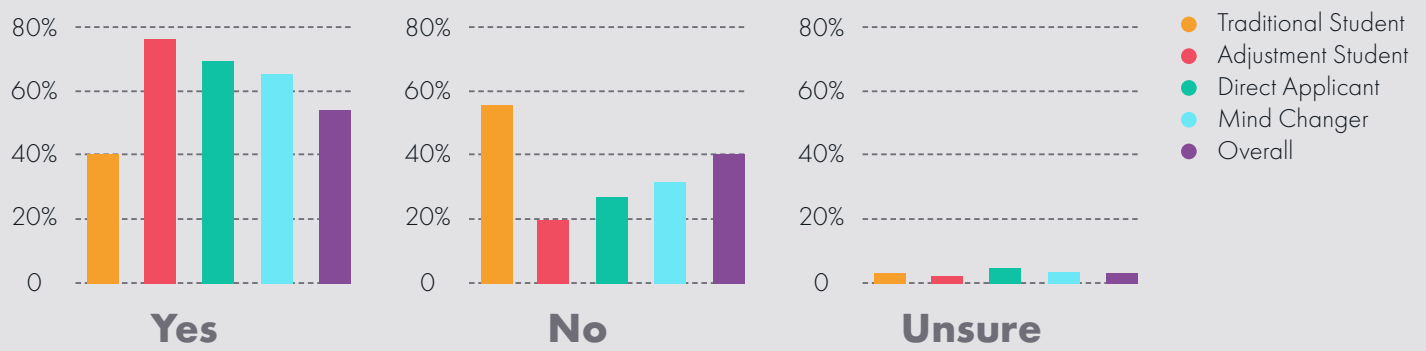
The majority of students (55%) went to the institution that they first called. The Traditional Clearing Student is the outlier here with only 40% taking their place at the first institution they contacted.

Section 4: University Offers

HOW MANY OFFERS DID YOU RECEIVE BEFORE MAKING YOUR DECISION?



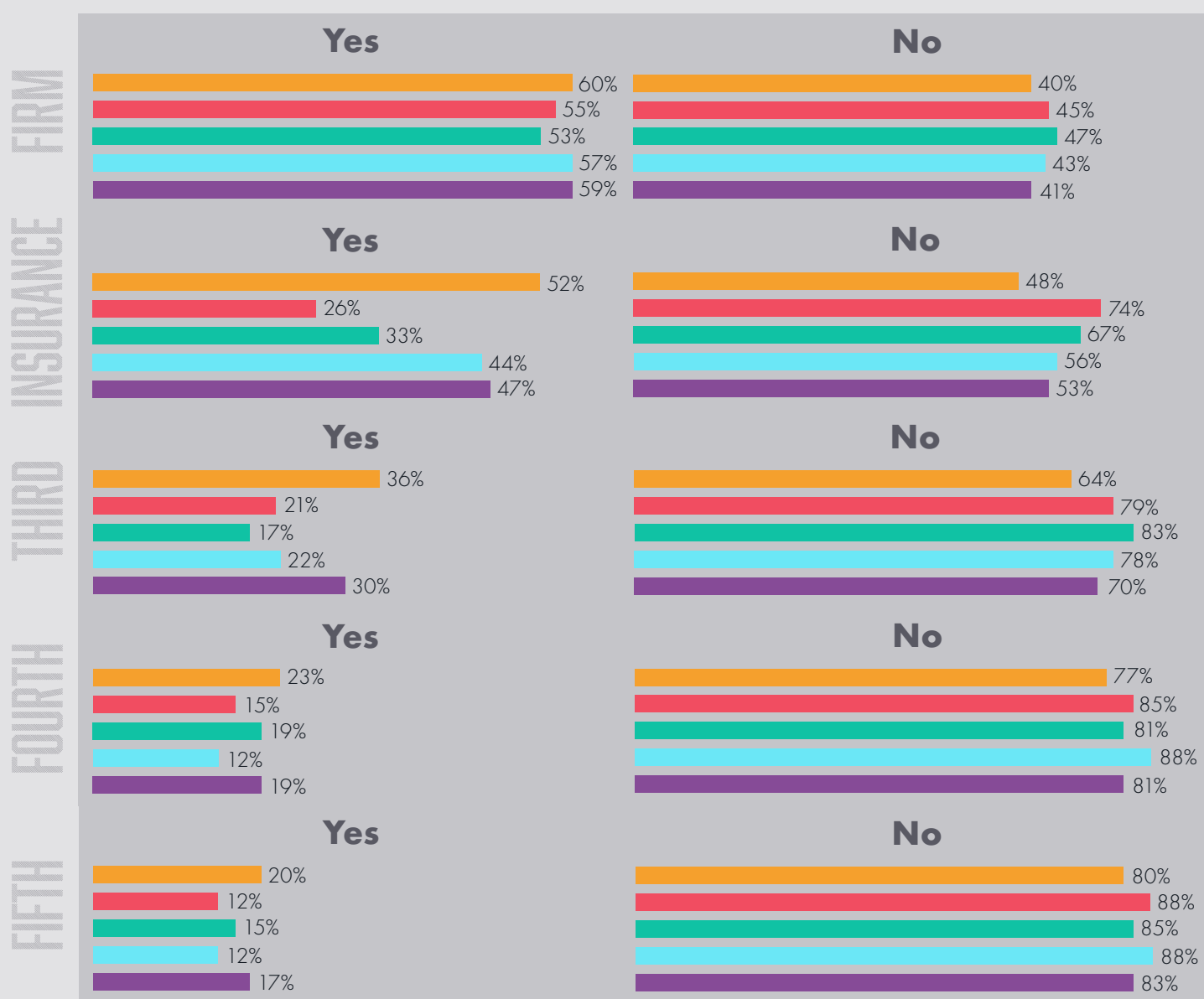
WAS THE INSTITUTION YOU ENROLLED WITH THE FIRST ONE YOU CONTACTED?



Section 4: University Offers

This year, we also asked our respondents about which of their UCAS choices they contacted in order to understand the importance that each profile attached to their UCAS choices. Respondents were three times as likely to contact their firm choice than their fifth choice. Of the profiles, we observe that the Traditional Student was most likely to contact both their firm choice and their fifth choice, showing the greatest range. It is likely that the Traditional Clearing Student still wishes to attend their firm or insurance choice institution, but is unable to due to not achieving their grades. This then results in them needing to contact additional institutions to secure a place, which also helps explain why they contacted more HEIs than the other groups.

DID YOU CONTACT ANY OF YOUR ORIGINAL UCAS CHOICES?



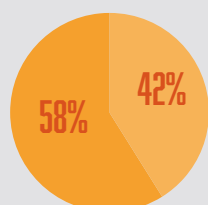
Section 4: University Offers

This year, overall, 42% of students changed their original UCAS choice, up seven percentiles since 2016. The Mind Changer was the most likely to change their subject in 2017. We can hypothesise that this is because they prioritise non-academic factors, such as the location of the HEI, so they may be more likely to compromise their subject.

There is no chart for Direct Applicants below as they are applying for the first time through Clearing.

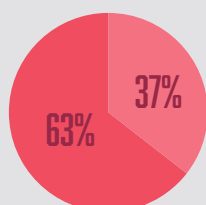
DID YOU CHANGE YOUR ORIGINAL SUBJECT CHOICE?

TRADITIONAL STUDENT



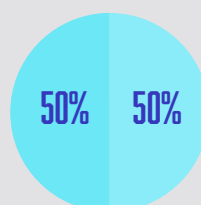
● Yes
● No

ADJUSTMENT STUDENT



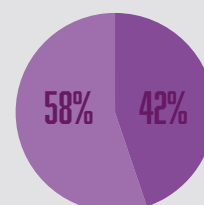
● Yes
● No

MIND CHANGER



● Yes
● No

OVERALL



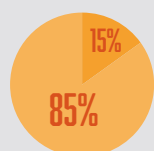
● Yes
● No

14% of respondents indicated they would be doing a Foundation year before their honours degree studies began.

The Foundation year was least prevalent with the Adjustment Students (6%), whilst the Direct Applicant was most likely to do a Foundation (20%), perhaps because they are often returning to education after a break.

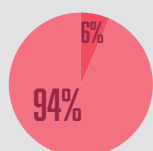
DOES YOUR COURSE INCLUDE A FOUNDATION YEAR?

TRADITIONAL STUDENT



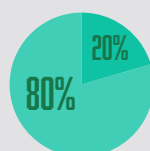
● Yes
● No

ADJUSTMENT STUDENT



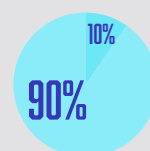
● Yes
● No

DIRECT APPLICANT



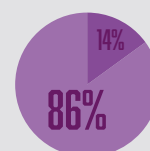
● Yes
● No

MIND CHANGER



● Yes
● No

OVERALL



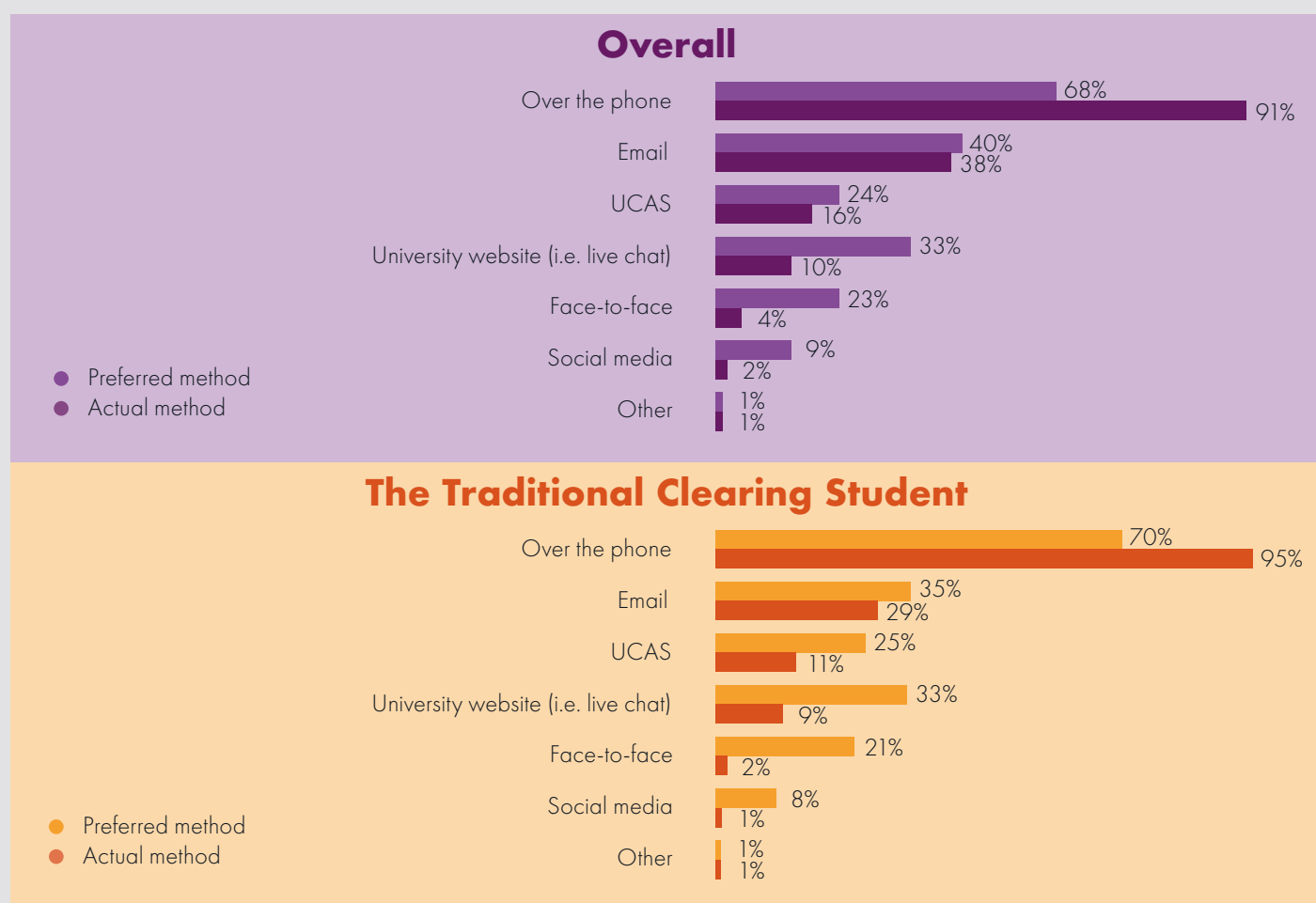
● Yes
● No

Section 4: Securing a Clearing Space

Students were asked how they actually secured their place and how they would have preferred to secure their Clearing place. Continuing 2016 trends, we observe that a phone call is still the most commonly preferred method, with 68% preferring to use the phone. This is also the most preferred way for institutions to confirm places - our respondents indicated that 91% of Clearing students secured their place in this way. However, the results did show that students may rather use email, live chat or face-to-face communications to secure their Clearing place, options that are not as apparently widespread.

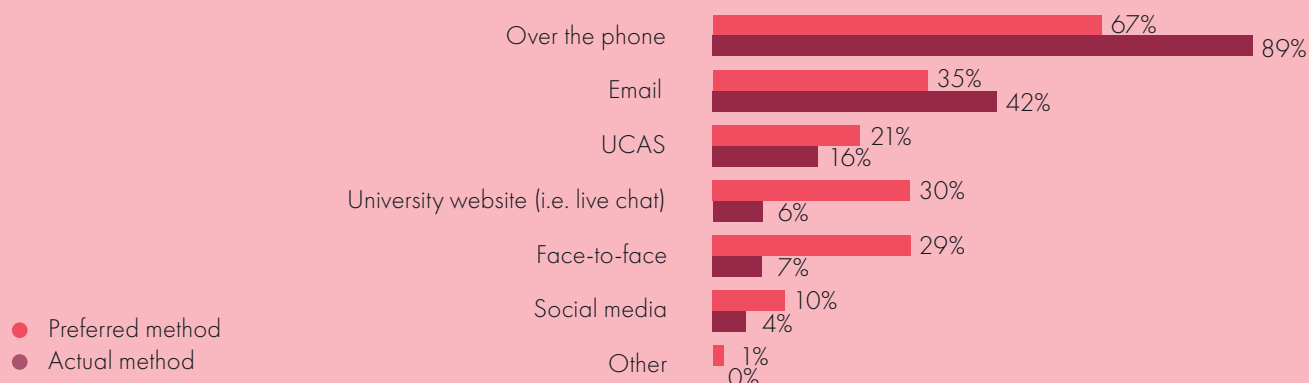
The 2017 survey found a big change in the way that students would like to secure their place in Clearing. 'Live Chat' is favoured by 33% of students, but only 10% actually secured their place (this option did not appear in the 2016 survey).

WHICH FORMAT WOULD YOU PREFER TO USE TO SECURE YOUR CLEARING PLACE?

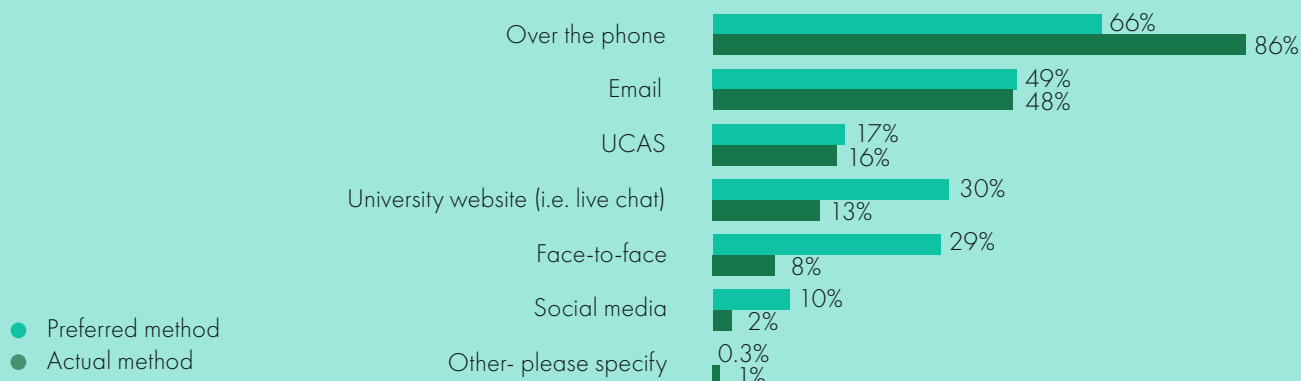


Section 4: Securing a Clearing Space

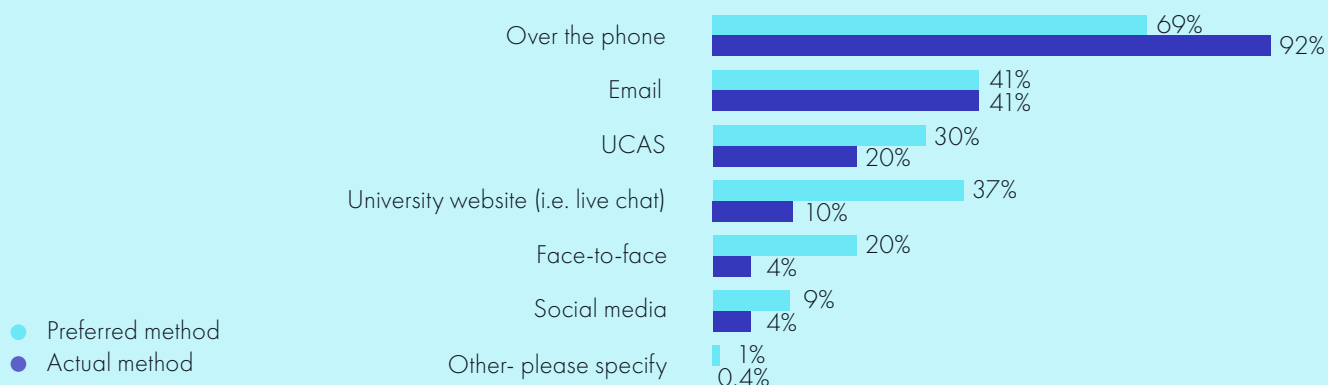
The Adjustment Student



The Direct Applicant



The Mind Changer



33% of Clearing students would like to secure their place via a Live Chat service versus 10% who actually did.

Section 4: Securing a Clearing Space

In 2016, just 0.3% of respondents wanted to secure their place through social media. In 2017, this has increased to 9%. In addition to its widespread usage as a social media, communication and research tool, it appears that a significant portion of the Clearing student audience is now willing to accept it as a tool with which to secure their university place.

These findings offer a really interesting insight into the rapidly evolving behaviours of Clearing students and how they view the online media they consume. Institutions who incorporate more flexible ways of confirming offers, and are early adopters for live chat and direct messenger functions, can capitalise on this. For marketers, in-platform messaging and advertising options can increase your brand's visibility and drive conversions on A-level Results Day.

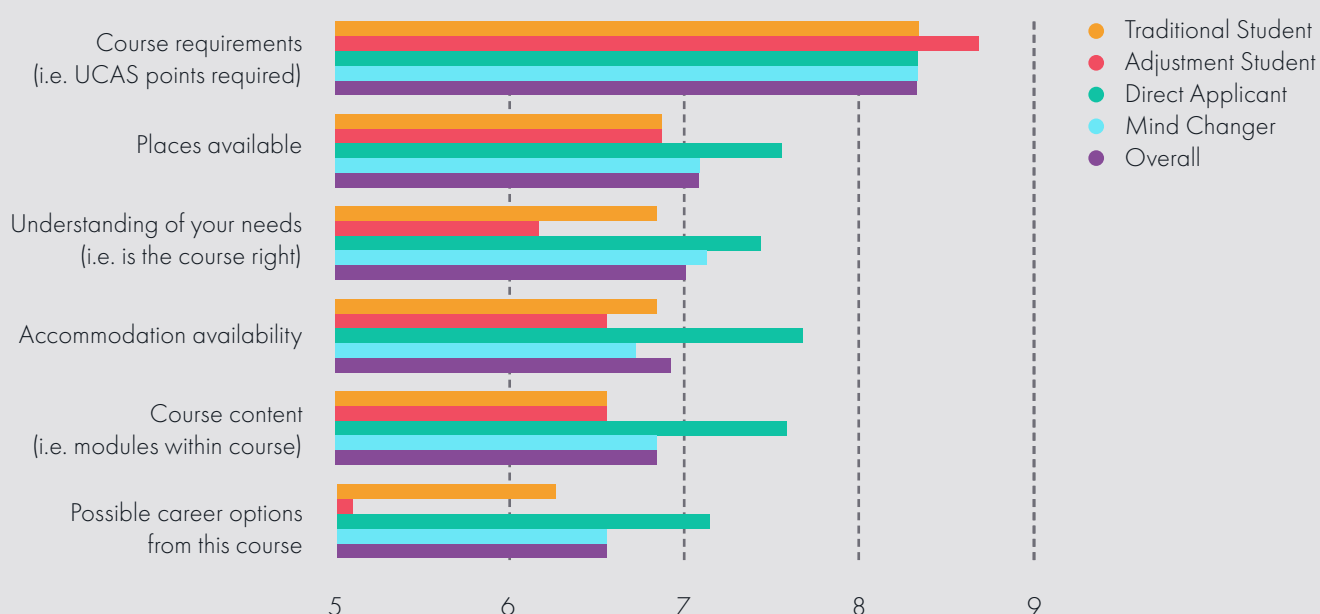
Section 4: Clearing Experience

The National Clearing Survey asked students to rate various factors in relation to the member of staff's knowledge during a telephone call, on a scale of 1-10, where 10 is fully informed.

Students rated staff who answered Clearing calls as knowledgeable about course requirements. However, they scored much lower on career options, course content, places available, accommodation, and understanding of the student's needs (i.e. helping the enquirer to understand whether the course or institution was the right fit for them).

This is perhaps an indicator that institutions still place a greater weight on what they require from the exchange - confirmation that students have the minimum entry requirements - than what the applicant values from the process. Therefore, there are opportunities here for HEIs to become more student-orientated during Clearing and ultimately gain competitive advantage over competitors.

HOW DO YOU RATE STAFF'S KNOWLEDGE ON VARIOUS FACTORS?



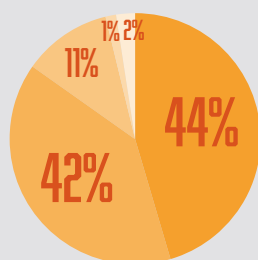
Section 4: Clearing Experience

This year, we asked respondents to rate their overall experience with their Clearing destination during the Clearing period. The majority of students had either an excellent or good experience. However, 3% of students (who still enrolled on the course) felt that they had either a poor or unsatisfactory experience. Direct Applicants were the most likely to have an excellent experience, while negative experiences were pretty evenly distributed across the board.

While experiences were overall positive, there are opportunities for the majority of HEIs to improve the experience they offer - such as improving interactions with call handlers as detailed on the previous page - to aim for excellence and gain competitive advantage.

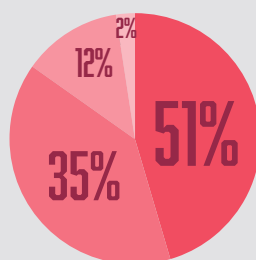
PLEASE RATE YOUR OVERALL EXPERIENCE WITH YOUR CLEARING UNIVERSITY DURING THE CLEARING PERIOD

TRADITIONAL STUDENT



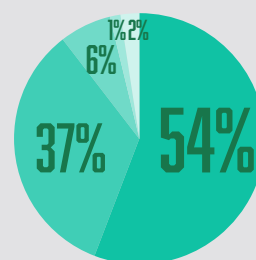
- Excellent
- Good
- Average
- Poor
- Unsatisfactory

ADJUSTMENT STUDENT



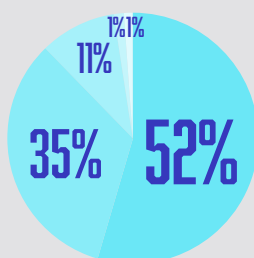
- Excellent
- Good
- Average
- Poor
- Unsatisfactory

DIRECT APPLICANT



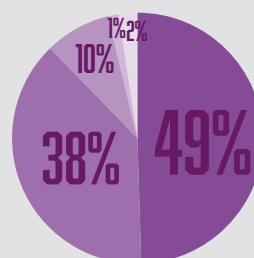
- Excellent
- Good
- Average
- Poor
- Unsatisfactory

MIND CHANGER



- Excellent
- Good
- Average
- Poor
- Unsatisfactory

OVERALL

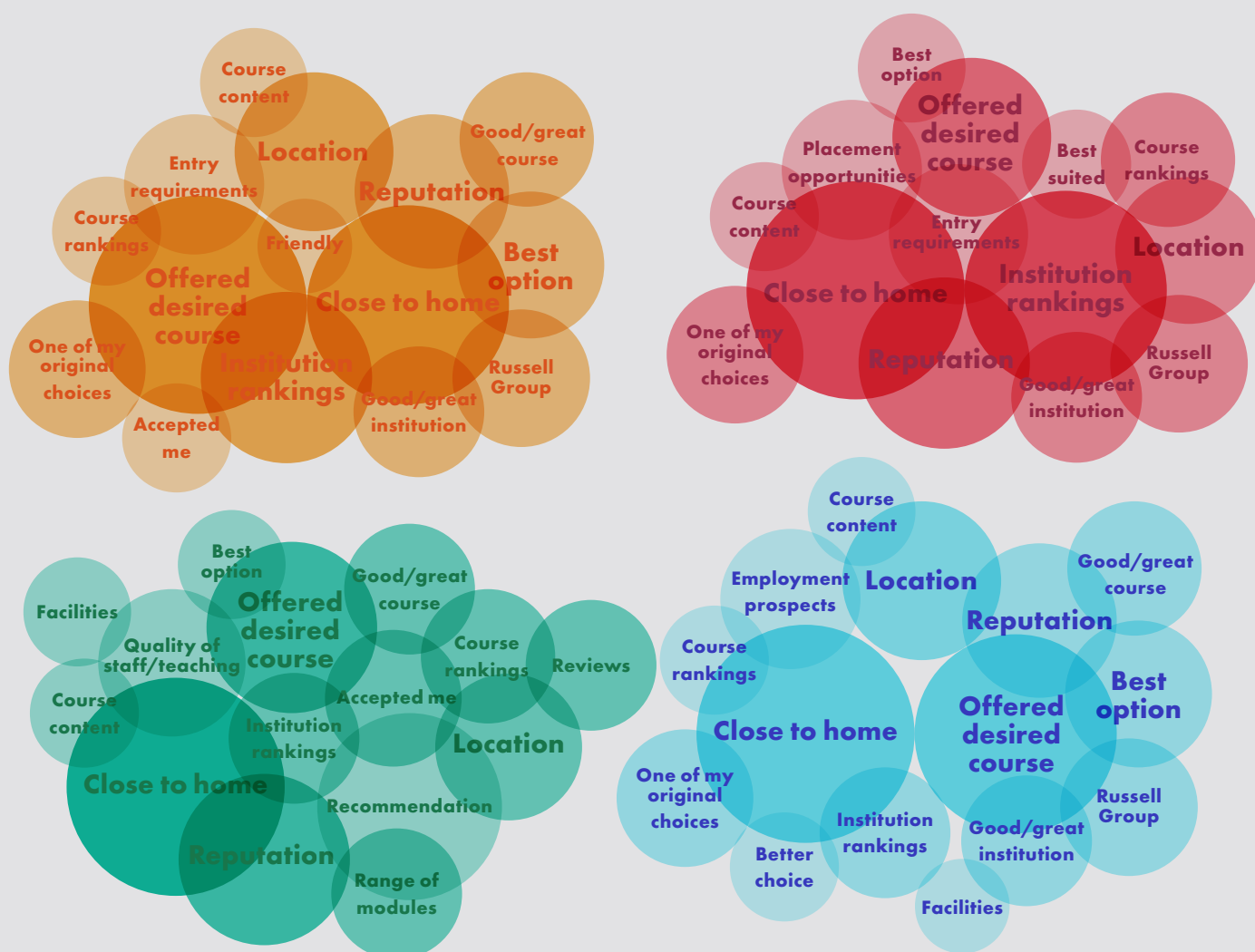


- Excellent
- Good
- Average
- Poor
- Unsatisfactory

Section 4: Reason for Choosing Clearing Institution

Students were asked what the main reason was for choosing their Clearing destination. For all of our groups, apart from The Traditional Student, 'close to home' was the main reason that Clearing students chose to study at their destination institution. For providers who are targeting these groups in their advertising, they can use this insight to shape their messaging and use geo-targeting tactics for advertising campaigns.

WHAT WAS THE MAIN REASON YOU CHOSE TO STUDY AT YOUR CLEARING INSTITUTION?



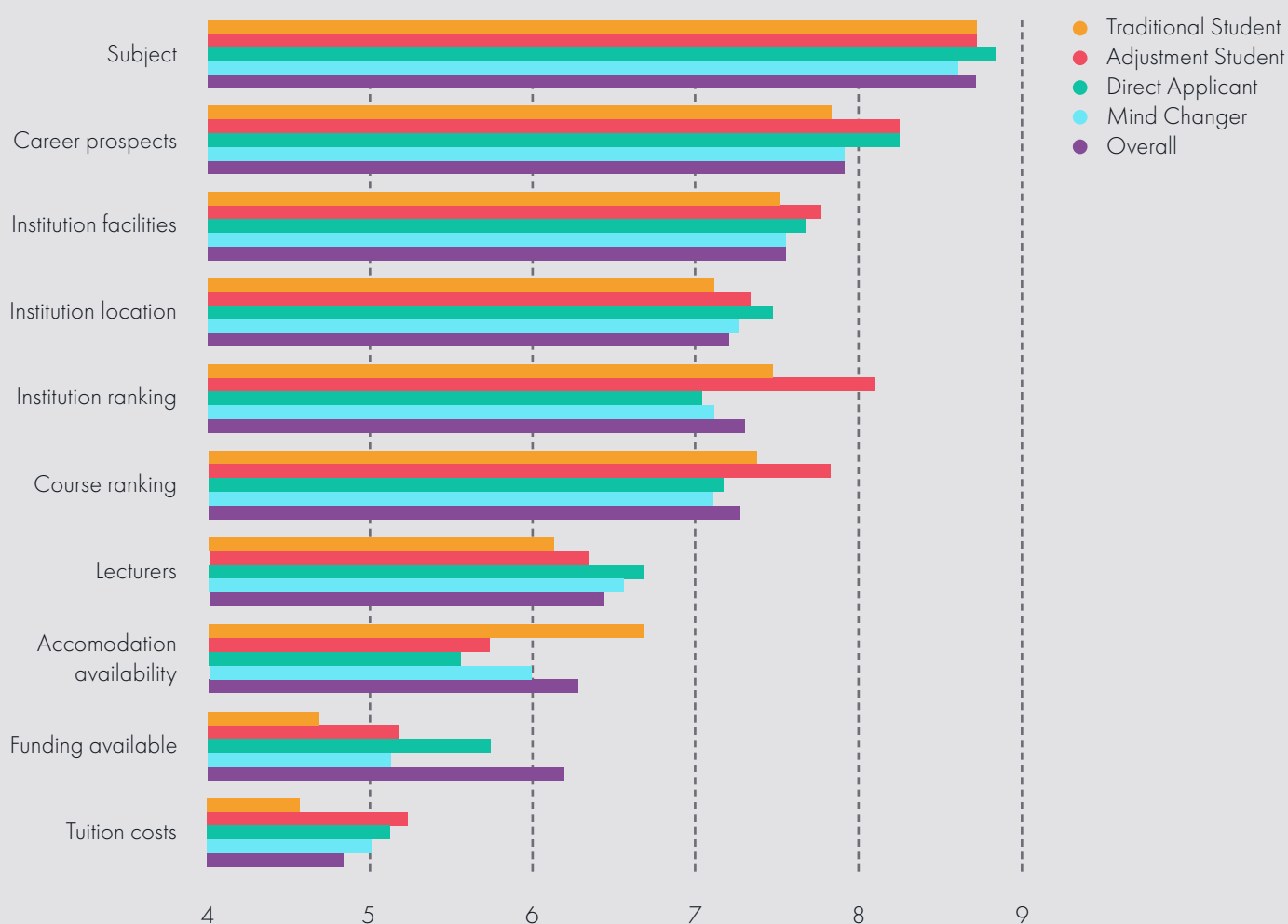
Section 4: Reason for Choosing Clearing Institution

Overall, the course subject was the most important factor in determining which offer was selected, rating on average 8.7 out of 10 across the profile groups. The next most important ranking factors were 'Career prospects' (7.9) and 'Facilities' (7.6). Despite the rising costs of higher education, tuition costs and funding ranked as the lowest factors, perhaps because these do not serve as differentiators across institutions.

'Institution ranking' was the third most important factor for the Adjustment Student, whilst relatively unimportant to the other Clearing profiles. This may reflect the Adjustment Student's aim to 'cash in' on their higher-than-expected grades by selecting an institution with a strong ranking.

With so much statistical evidence that 'Course Subject' is important to a student's final Clearing decision, it is vital that marketers remember that their campaigns and messaging should retain granular, subject-level advertising (as well as a long-term content approach), as a vital part of their strategies, alongside branding campaigns and generic Clearing campaigns.

WHICH WERE THE MOST IMPORTANT FACTORS IN SECURING YOUR CLEARING PLACE?



SECTION 5.

Conclusion



Conclusion

This is the third, and most insightful, edition of the annual National Clearing Survey, providing year on year benchmarks and trends and quality second party data for national context. 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 audience profiles for their institution and create a cross-channel, cross-platform marketing strategy that addresses the needs of their prospective students.

Clearing has traditionally been seen as a route into university for students who have not achieved the grades they needed, but, increases in Clearing acceptances this year came from direct acceptances, which according to the UCAS end of cycle report, increased by 14% from 2016 (equating to 2,100 more direct acceptances). The National Clearing Survey responses reflect this change with our own findings at 9%, indicating that the methodology and findings are in line with those of UCAS.

Don't miss out on the opportunity to grow and focus on a long-term content-led strategy that is targeted at the Direct Applicant group, and using the insights contained within this report, address the unique concerns, barriers and influencing factors for this group, armed with the knowledge of which platforms and devices they are using and when.

Armed with the findings within this report, marketers can shape their strategies and messaging towards these Direct Applicants and would be well-advised to ensure that their call handling team are well-briefed and application process and supporting information are developed to meet the needs of these applicants.

Institutional research has been starting earlier and earlier each year since the National Clearing Survey was launched. In 2017, 20% of students began their research before exams ended in May. On A-level Results Day itself, 72% of students had collected their results by 10am and many had begun conducting their search for a Clearing place within the first two hours of their receiving their results. Early planning and execution is therefore vital for HEIs, with cut-through creative and brand awareness campaigns forming an integral part of any effective strategy.

One common theme from our previous reports has been the growth of mobile as a research device and the need for institutions to have optimised websites which can offer a seamless, mobile-friendly digital journey. In 2017, 60% of students used a mobile device during their Clearing searches, whilst mobile-only accounted for 20% of all searches, an increase of 3% on 2016.

Make sure you have a mobile-first approach in terms of your website design, responsiveness and ease-of-data capture. Ensure that your Clearing creative is optimised and designed for mobile platforms and utilise the innovative options on platforms such as Instagram, Snapchat, Facebook and YouTube that work best when displayed on mobile. Having mobile specific ad tactics ensure that your brand will have the edge throughout the Clearing period, driving more awareness, actions, applications and ultimately, enrolments.

Conclusion

Students continue to use a huge variety of social media, Snapchat is being used on a daily basis by 71% of respondents (up from 65% in 2016) whilst Instagram is used by 68% (up from 59%) and YouTube at 66% (up from 59%). Facebook remains a popular platform but has fallen by 6% from 66% in 2016 to 60% in 2017. As digital behaviours are changing, and Clearing students are adopting and diversifying the platforms that they are using on a daily basis, it becomes more important now than ever before to put your brand across all platforms.

Whilst we have presented the national findings, 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 average. Conduct a Google Analytics audit to understand where your social traffic comes from. Use a social media benchmarking tool, like Edurank, and deep-dive on what content is working well, what your competitors are doing and where the white spaces are so that you can post content at a time your audience is on the platform.

Given that Clearing is a competitive time for Higher Education Institutions and will become increasingly so, HEIs need to ensure they meet the needs of students through their promotion, processes and people. The 2017 survey found a big change in the way that students would like to secure their place in Clearing. 'Live Chat' is favoured by 33% of students, but only 10% actually secured their place via this method (this option did not appear in the 2016 survey).

In 2016, just 0.3% of respondents wanted to secure their place through social media. In 2017, this has increased to 9%. In addition to its widespread usage as a social, communication and research tool, it appears that a significant portion of the Clearing student audience is now willing to accept social media as a tool with which to secure their university place.

These findings offer a really interesting insight into the rapidly evolving behaviours of Clearing students and how they view the online media they consume. Institutions who incorporate more flexible ways of confirming offers, and are early adopters for live chat and direct messenger functions, can capitalise on this. For marketers, in-platform messaging and advertising options can increase your brand's visibility and drive conversions on A-level Results Day.

Friends were once again cited as the most common introduction to students destination providers and they were especially influential to the Direct Applicant, accounting for almost one in 4 of all referrals. In addition, Clearing students are diversifying which platforms they use on a daily basis to communicate with friends. Make sure your marketing and influencer plans and tactics have a cross-platform strategy incorporated. Look at which platforms are showing quick growth (such as Snapchat) and look at which audience you are targeting. This will help you choose how to prioritise your resources. The findings all point to the importance of your brand being across all platforms. Use your own data to set up look-a-like and custom audiences on Facebook to target potential students. Understand who your micro-influencers are, and work with them to create an authentic brand engagement that will introduce you to a new audience.

Conclusion

Students are using the Clearing process to their advantage and Higher Education Institutions need to adapt their strategies if they are to attract students and maximise conversion to enrolments during this period.

The Traditional Clearing Student is contacting on average 3.7 institutions during Clearing, (compared to 3.39 in 2016), with only 40% taking the first offer they received (down from 43% in 2016).

With the largest group in our survey researching more institutions, and less likely to take their first offer, it's more important than ever before that institutions close on the day. Introduce tactics like Call Tracking, so that you can tell which channels make your phone ring so you can optimise student traffic through that channel. Utilise the information in the report to understand how those who answer your calls can better meet the requirements of the Clearing student and increase conversion.

To reflect the changing attitudes, methods and changes in technology, the National Clearing Survey will be updated and repeated in 2018.

Take Part in The National Clearing Survey 2018

To reflect the changing attitudes, methods and technology, the National Clearing Survey will be updated and repeated in 2018. The Insight Division at Natives Global Consulting are registering institutions who wish to take part and collaborate in the National Clearing Survey 2018. There are a number of benefits to your institution if you choose to participate:

- > **You'll receive a survey branded to your institution to share with your 2018 Clearing students.**
- > **Be the first to receive a copy of the full report before non-participating institutions.**
- > **You'll have access to your institutions' raw data which will allow you to benchmark the actions of your Clearing students with the average findings.**
- > **Your students who take part will automatically be entered into a prize draw to win a Macbook Pro 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 2018

www.nationalclearingsurvey.com/take-part



NATIONAL CLEARING SURVEY
ANNUAL REPORT 2017

NATIVES GC

About Natives Global Consulting

Natives Global Consulting is the leading audience insights and conversion strategies consultancy, specialising in student and education global recruitment and marketing. We help you understand your data and make better decisions.

Natives Global Consulting's Insights and Research team, the people who carried out the National Clearing Survey, are the brains behind Edurank, the worlds only digital benchmarking tool for the education sector.

The team also work on a number of national research projects with partners in the HE sector, as well as client-specific projects and major government initiatives that have shaped international recruitment strategies.

Natives Global Consulting is now in the process of planning The National Clearing Survey 2018 and will be announcing other research initiatives imminently.

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