



**NATIONAL CLEARING SURVEY**

Annual Report | 2018/19

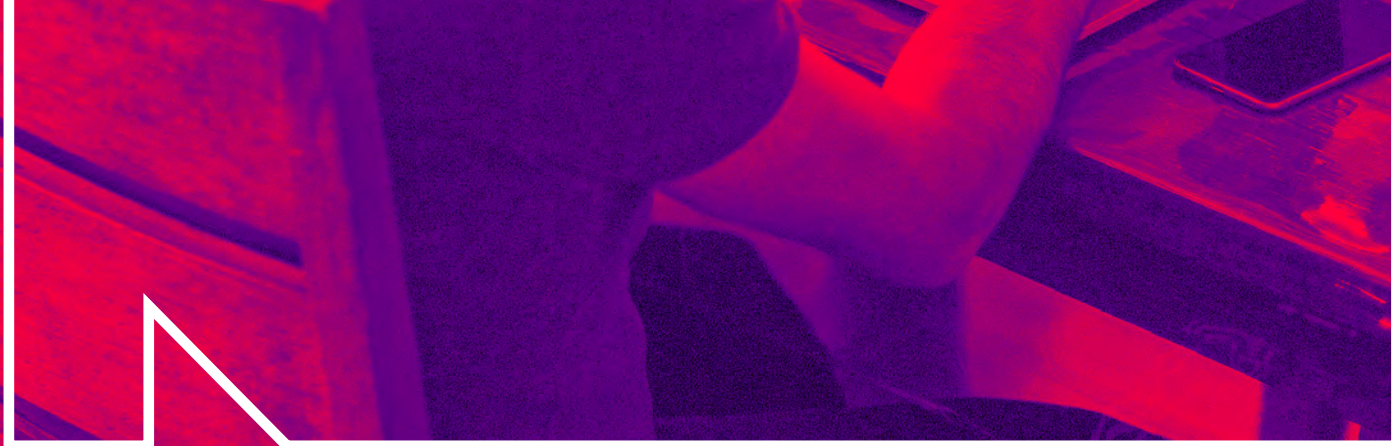
# REPRESENTATIVE. INDEPENDENT. INSIGHTFUL.

Say hello to the  
National Clearing Survey.





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# About the National Clearing Survey

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

The National Clearing 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 three post-92 HEIs, one in four Russell Group institutions, plus public and specialist institutions, this year's research analysed 530,000 data points and includes deep-dive qualitative surveys with 4,106 students. The results have been benchmarked against the findings from the previous three years of research to identify evolving short and long-term trends and present the most insightful National Clearing Survey ever.

At the end of the 2018 cycle, 60,100 applicants were accepted in Clearing, a new record high – up 0.3% on the year before. This despite the total applications being down by 2% (and a 2.5% national decrease in the number of 18-year-olds in the UK). Once again, there has been a rise in the number of Direct Applicants (14,140, up 3.4%) and a decrease in the main scheme (45,690, down by 1.3%). Traditionally, Clearing has been seen as a route into Higher Education for students who haven't achieved the grades they needed. Increasingly, Clearing is becoming an active choice for applicants to secure their place at university in a way that suits them. So, it's no surprise that the behaviours of students are also evolving rapidly.

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 before, during and post-A-level Results Day. The report looks at the 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 equipping you with the information you need to target 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 marketing decisions that will give you the edge.

# Methodology

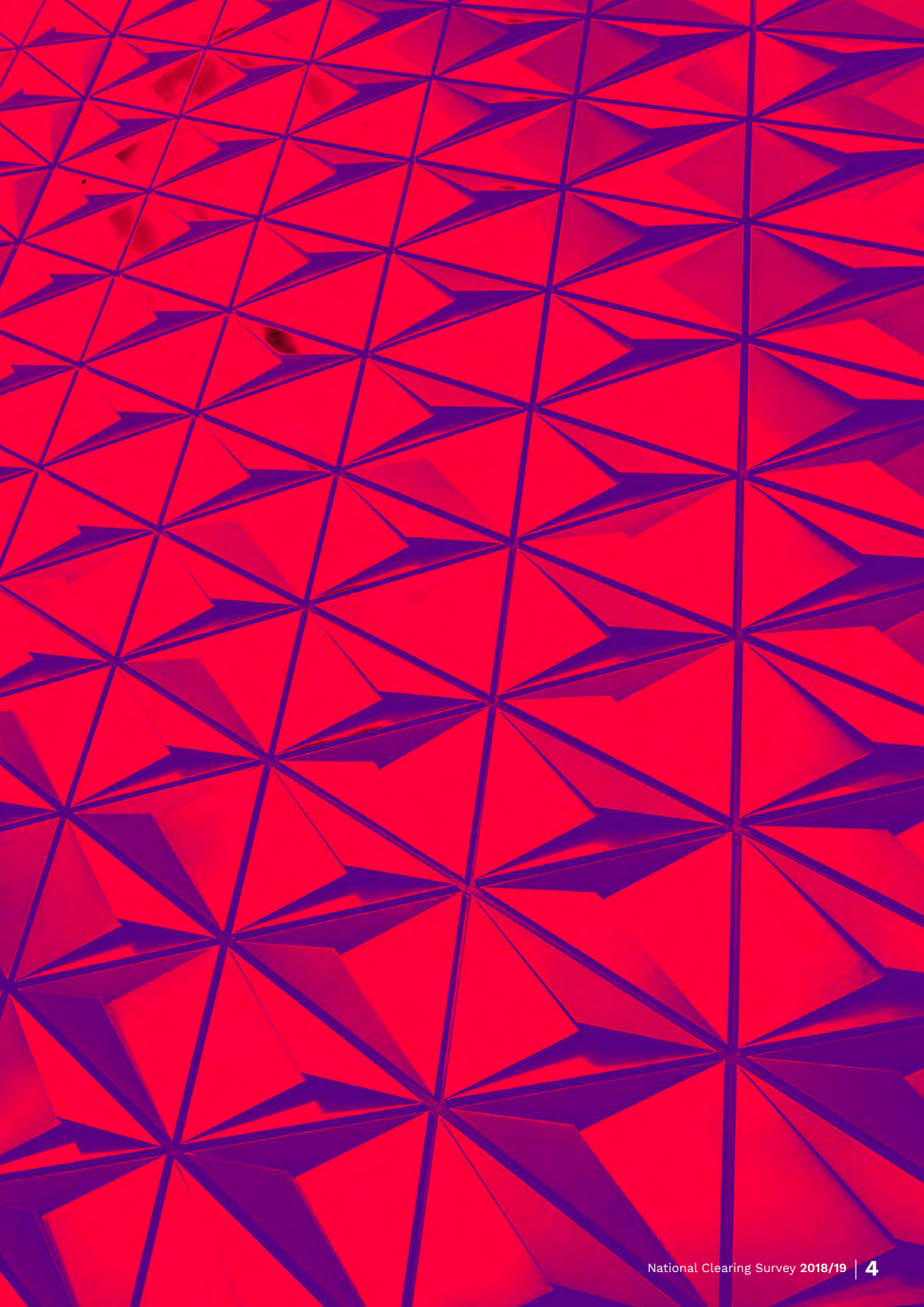
The National Clearing Survey 2018/19 was open to all students who applied to university through Clearing for the 2018/19 academic year.

Every HEI in the UK was invited to collaborate on the survey by Natives Global Consulting. In total, we analysed over 530,000 pieces of data and conducted 4,106 qualitative surveys with students from 127 different UK institutions. In total, 33 institutions took part in this year's survey.

The survey was open from 16th August 2018 until 31st October 2018.

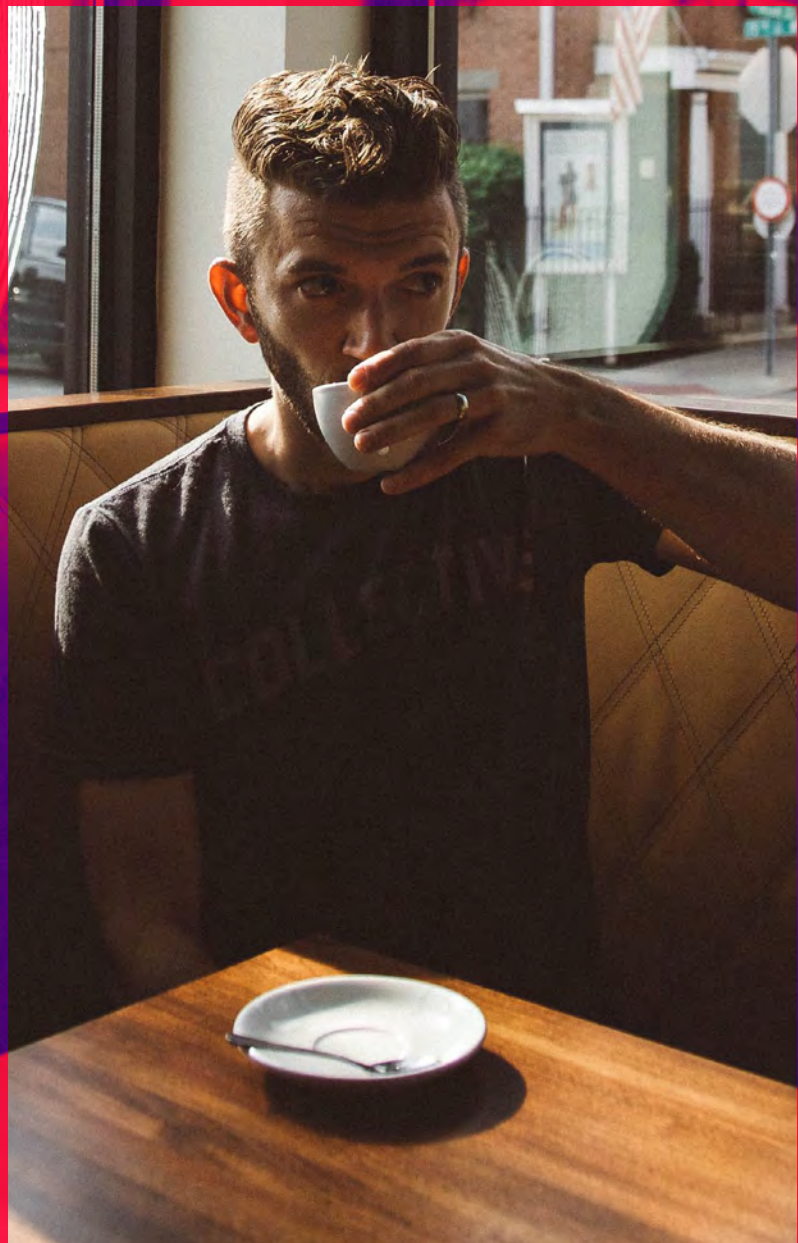
Equal weighting was given to each participant's response.





# KEY FINDINGS

at a Glance





# 1

Clearing students are conducting less early research prior to A-level Results Day

# 2

It continues to be increasingly important to include device specific strategies because of the rise of mobile

# 3

Students continue to use a huge variety of social media on a daily basis to communicate with one of their most important influencers, friends

# 4

Facebook continues its trend of losing relative market share amongst the Clearing student audience, with 51% using it on a daily basis, compared with 66% in 2016

# 5

Clearing students are taking fewer affirmative actions during the student cycle, which will create more of a challenge to market and support a student from initial interest through to enrolment

# 6

Clearing students expect a quick response to their enquiry and a clear and concise process, or they'll look elsewhere

# 7

A substantial amount of students that are rejected can still end up at their firm or insurance choice

# 8

Students felt mostly negative emotions during their Clearing experience

# 9

More Mind-Changers are going through Clearing than ever before, with students increasingly changing their subject choice

# SECTION 1: The Four Clearing Profiles

The National Clearing Survey revealed four distinct personas 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, education, destination, motivation, influencers and the top social platforms used daily.

This segmentation portrays the different characteristics beyond what might be considered as a 'traditional Clearing student'. It illustrates that there are 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 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 are looking for a Higher Education Institution with higher grade boundaries.



## 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 the Clearing process.



## THE MIND CHANGER

The Mind Changer is 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.

# → THE TRADITIONAL CLEARING STUDENT

Age

18.4

## Gender divide

59%

female

41%

male

<1%

other

## Top course choice factors

Course Subject

Course Content

Career Prospects

## Top influencers

Parent/Guardian

University staff

Sibling

## Top destinations

45% Russell Group

27% Post 92

23% Other uni

## Further education studied

92% A-levels

4% BTEC

4% IB

## Top daily social platforms

 81%

 80%

 70%

60%

Who researched about Clearing prior to Results Day



# THE ADJUSTMENT STUDENT

Age

18.5

## Gender divide



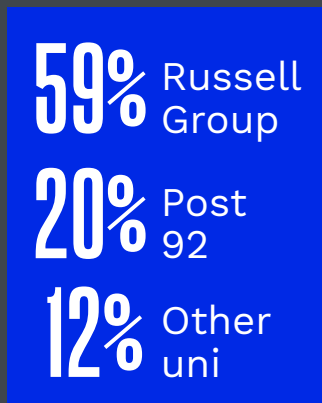
## Top course choice factors

- Course Subject
- Course Content
- Course Ranking

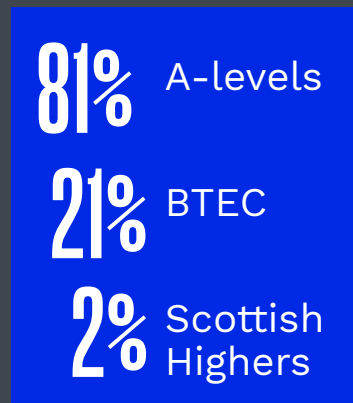
## Top influencers

- Parent/Guardian
- Friends
- Teacher

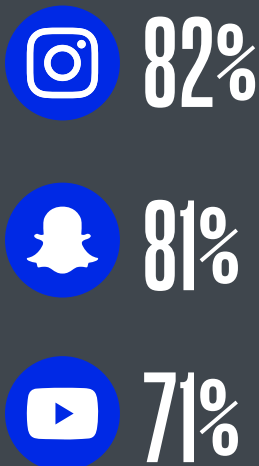
## Top destinations



## Further education studied



## Top daily social platforms



59%

Who researched about Clearing prior to Results Day

# » THE DIRECT APPLICANT

Age

22

## Gender divide

59%

female

40%

male

1%

other

## Top course choice factors

Course Subject

Course Content

Career Prospects

## Top influencers

Parent/Guardian

Friends

University staff

## Top destinations

49% Post 92

28% Other uni

17% Russell Group

## Further education studied

63% A-levels

26% BTEC

6% NVQ

## Top daily social platforms

 68%

 65%

 61%

41%

Who researched about Clearing prior to Results Day



# THE MIND CHANGER

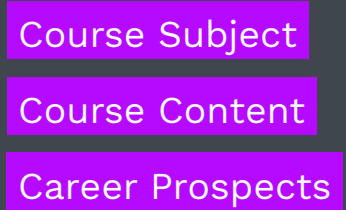
Age



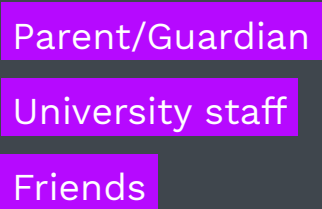
## Gender divide



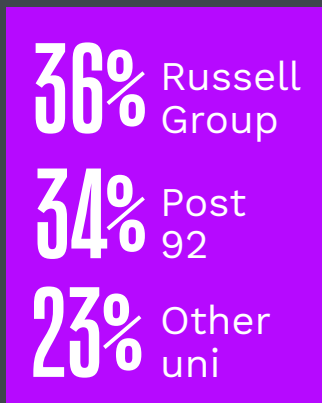
## Top course choice factors



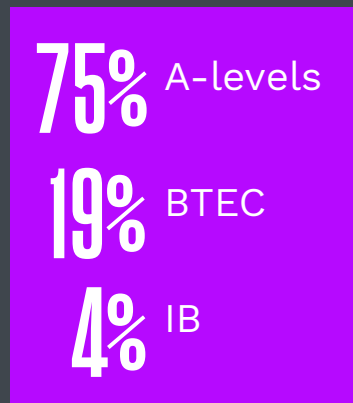
## Top influencers



## Top destinations



## Further education studied



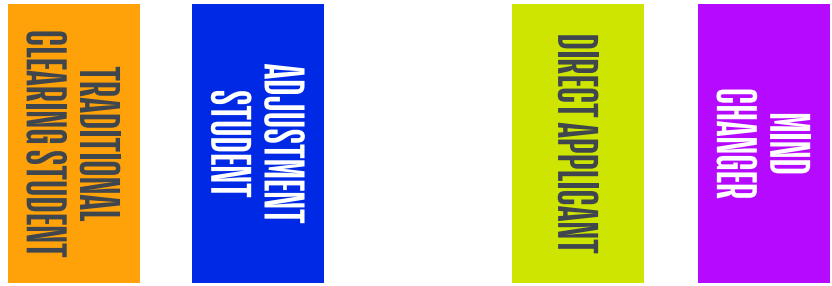
## Top daily social platforms



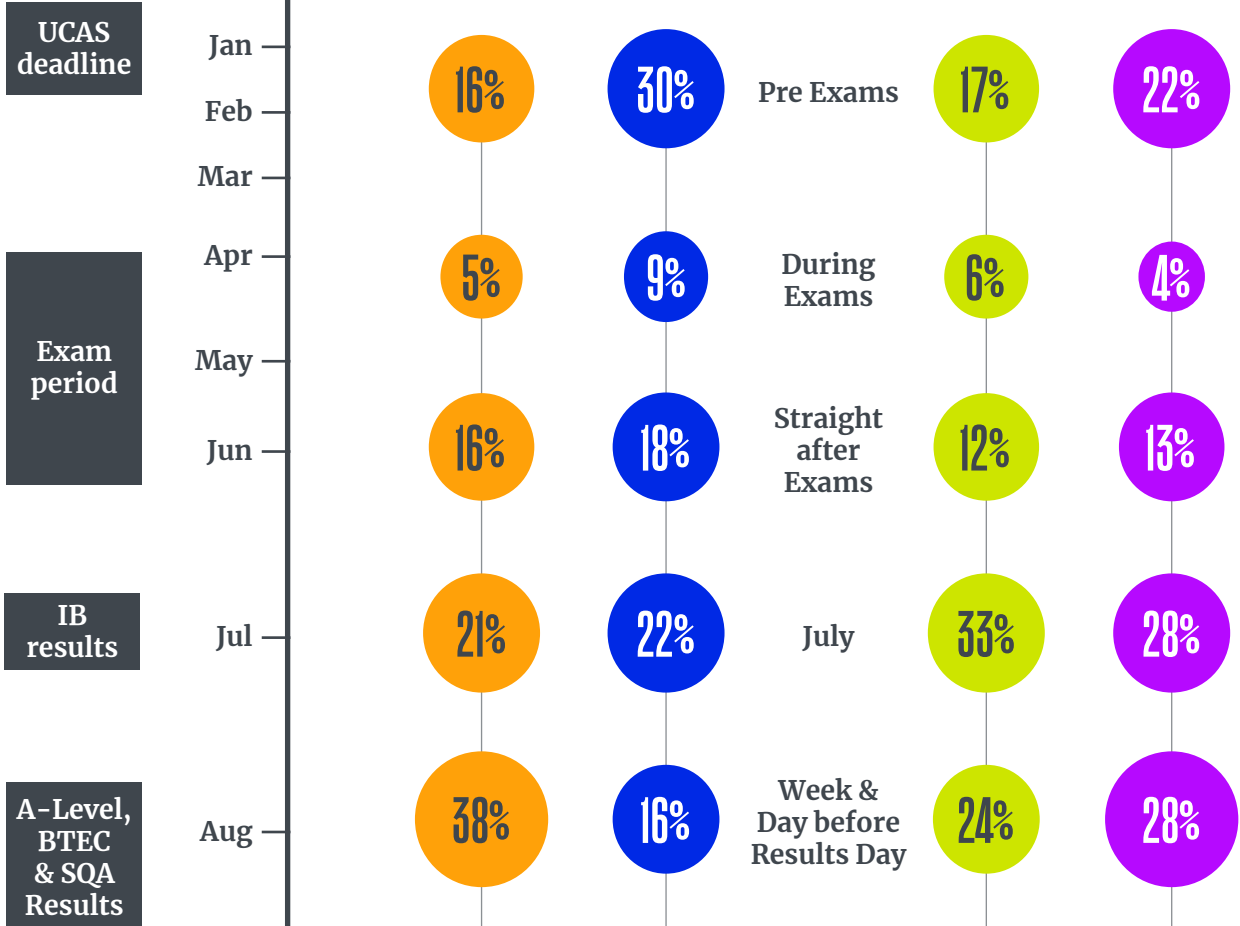
Who researched about Clearing prior to Results Day

# SECTION 2: The Clearing Timeline

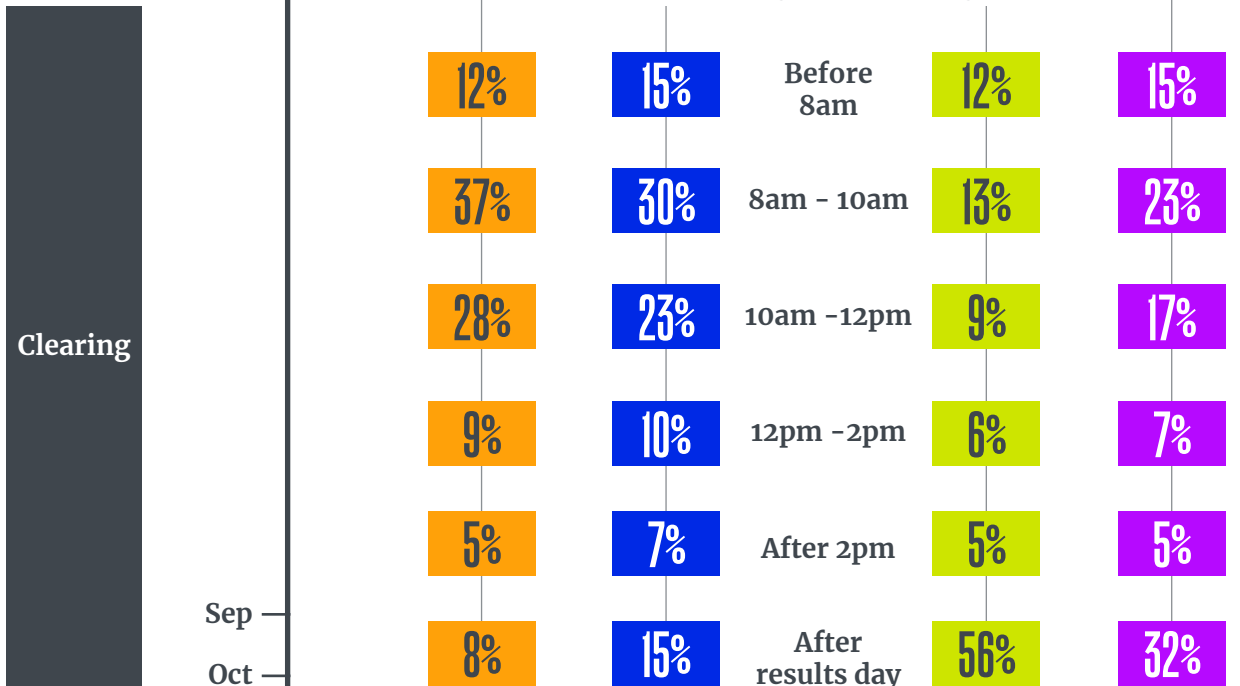




Start research (% of those who did research)



Start looking for a Clearing place



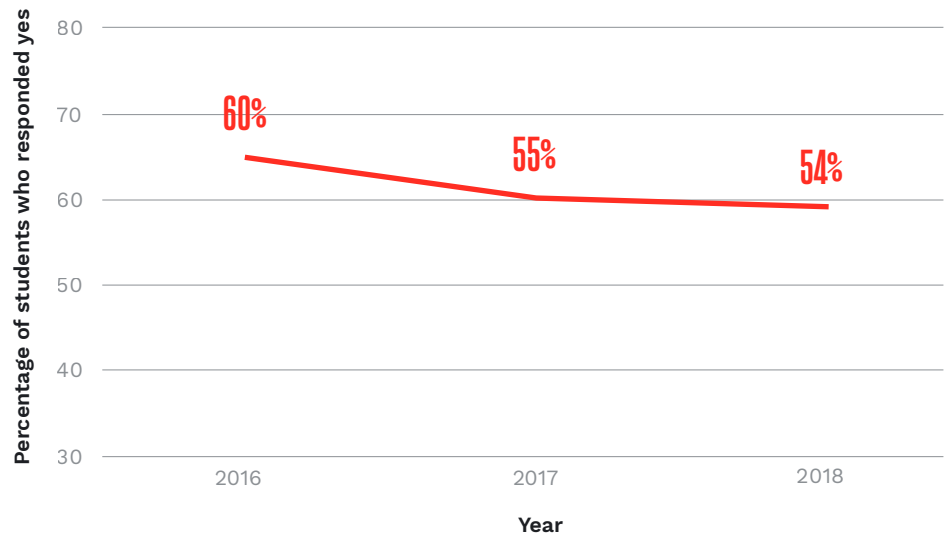


# SECTION 3: Key Findings

# 1. Clearing students are conducting less early research prior to A-level Results Day.

Students are becoming less likely to conduct research about Clearing prior to A-level Results Day, falling by 6 percentiles since 2016 and 1 percentile since 2017.

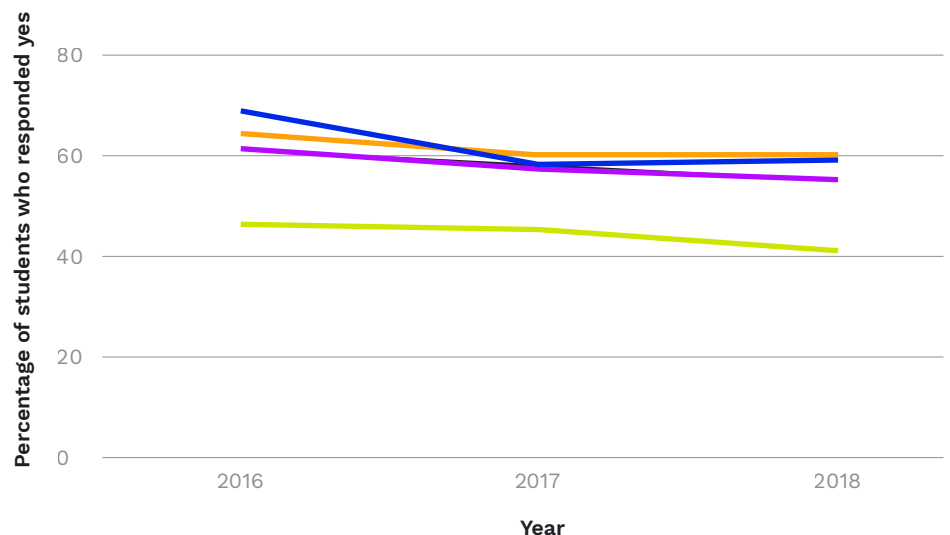
**Did you conduct any research about Clearing prior to Results Day?**



When broken down by persona, the largest group, The Traditional Clearing Student, has remained steady with the decrease seen across The Direct Applicant and The Mind Changer.

**Did you conduct any research about Clearing prior to A-level Results Day?**

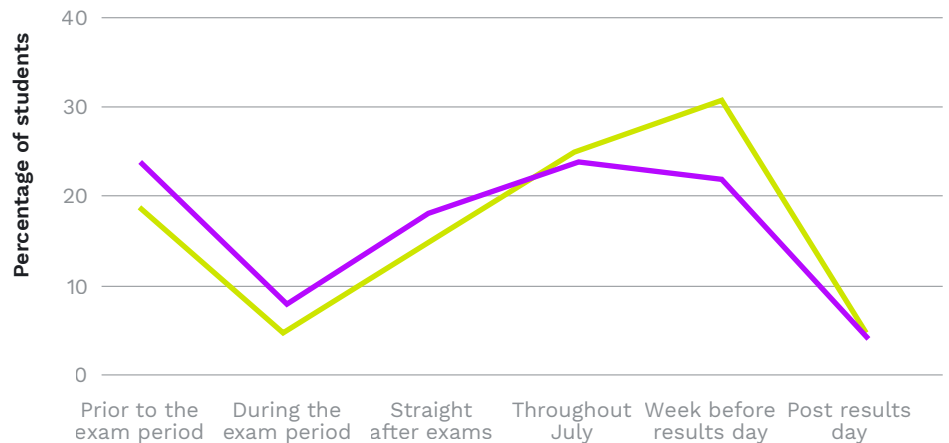
- The Traditional Clearing Student
- The Adjustment Student
- The Direct Applicant
- The Mind Changer



Students are also slower to start their research in comparison to last year. With a much higher proportion starting their research the week before Clearing.

**When did you start researching?**

- 2018
- 2017



However, when asked ‘Based on your experience of the Clearing process, if there was one thing that you think future students should know that would help them, what would it be?’ the most common answer category was ‘Look around/prepare before results day’.

As in previous years, the majority of students in Clearing will begin their research early, and institutions will need a strong brand presence and awareness strategy aimed specifically at prospective Clearing applicants.

The 54% of students who stated that they did carry out research prior to A-level Results Day were then surveyed on the type of information they specifically looked for. Respondents could select more than one option. Overall, ‘How Clearing works’ (63%) and ‘When Clearing opens’ (50%) were the two most popular search terms overall.

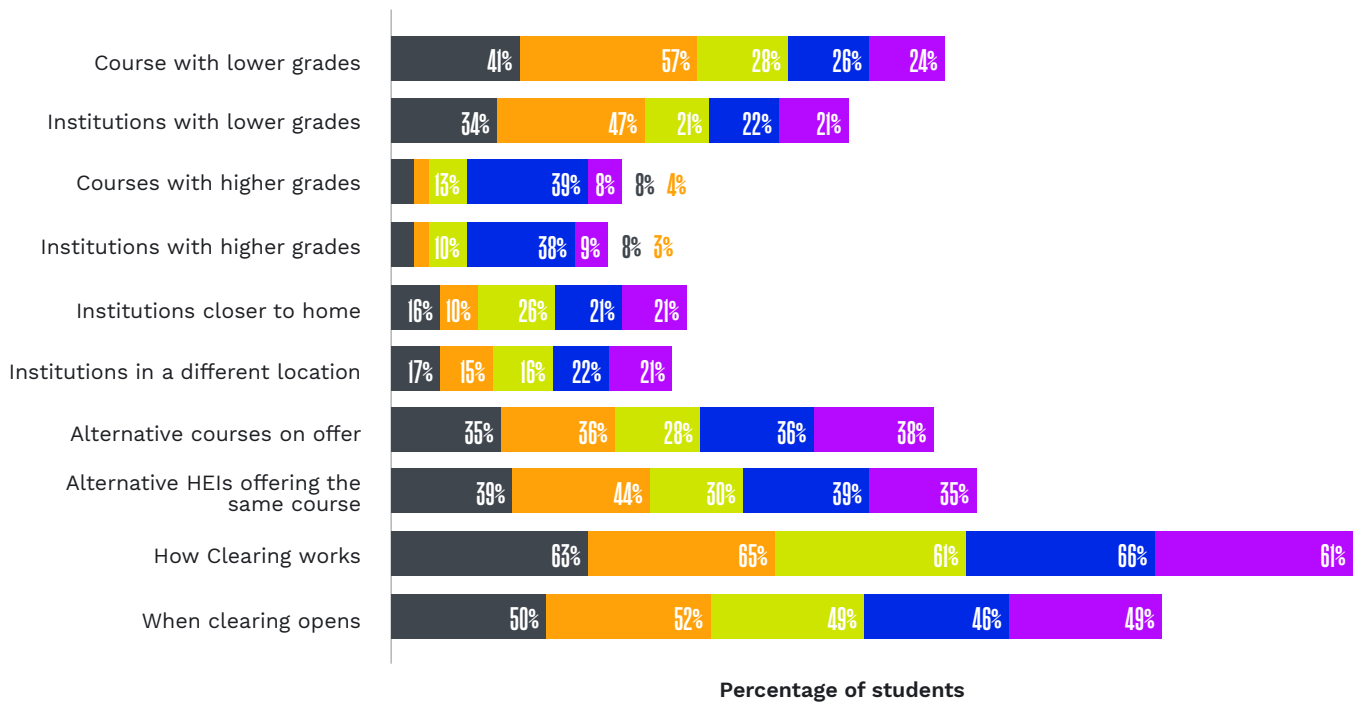
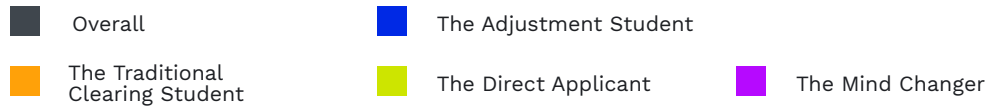
However, when you break this down by profile group, we see interesting differences and search behaviours which can shape your content strategies. The Traditional Clearing Student searches for ‘How Clearing works’ the most (65%) but also conducts high searches for ‘Courses with lower grades’ (57%). The Direct Applicant searches for ‘How Clearing works’ (61%) the most. ‘How Clearing works’ is also the most popular search term for The Adjustment Student (66%) and The Mind Changer (61%).

## What information are students searching for prior to A-level Results Day?

The below data indicates that marketers will need to focus both on a long-term content and SEO strategy, as well as focused advertising at key moments to ensure that prospective students are moving down the funnel from awareness. Capturing

prospect data is more important than ever before so that you can continue to market and remarket to students throughout their Clearing application journey and drive key activities that lead to conversions, such as Open Day events.

## What information did you look for prior to A-level Results Day?



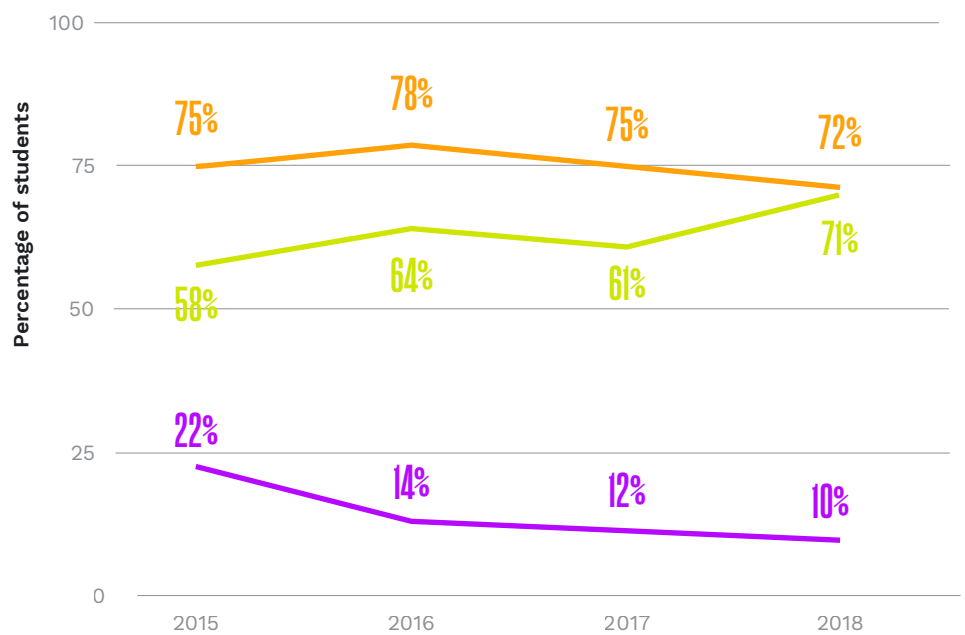
This can be used to determine both the timing and content of your campaigns. Savvy marketers can position their institutions as Clearing experts, providing information not only on their courses and entry requirements, but also the key processes and timeframes that students need to know in order to successfully and painlessly navigate Clearing.

## 2. The importance of device specific strategies during the rise of mobile.

Mobile continues its march towards being a ubiquitous device with which students use to research during Clearing, almost overtaking desktop computers as the sole-device for research for the first time.

### Which device(s) did you use when searching for a Clearing place?

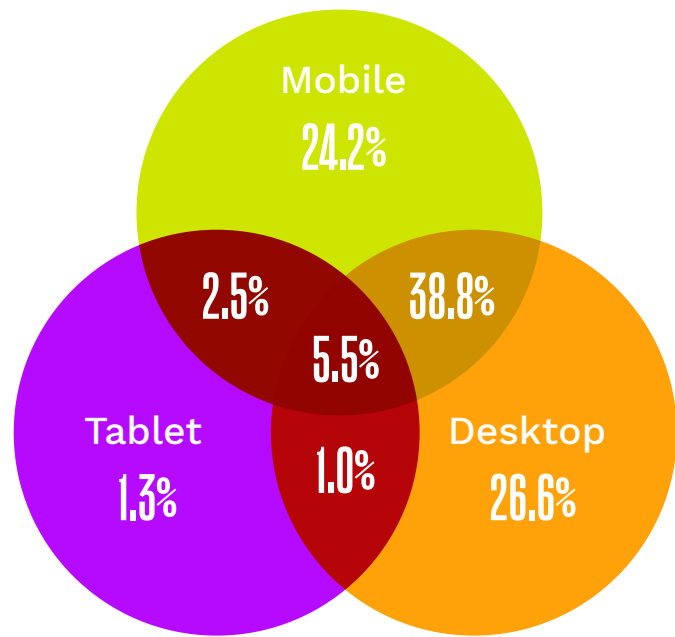
- Desktop
- Mobile
- Tablet



Just under one in four students (24%, up 4% on 2017) use mobile exclusively, compared to 26% using desktop (down from 36% in 2017).

While it is key that every strategy, content and creative, should include mobile-specific tactics, don't neglect desktop and tablet, as Clearing students still use a cross-section of devices.

## Device usage



## Recommendations

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Start by understanding your own data. A deep-dive analysis of your Google Analytics, to go into the metrics and dimensions and highlight what your data means and how you can use it, equipping you to make data-driven decisions. A website UX audit will help you understand how your site and key landing pages function on different devices to maximise conversion and ensure functionality.

A comprehensive, multi-channel strategy, with content and creative to support all phases of the student journey, delivered across a range of channels and devices to help drive enrolments at all stages of the funnel, is imperative to reflect the behaviours of a Clearing student in 2019.



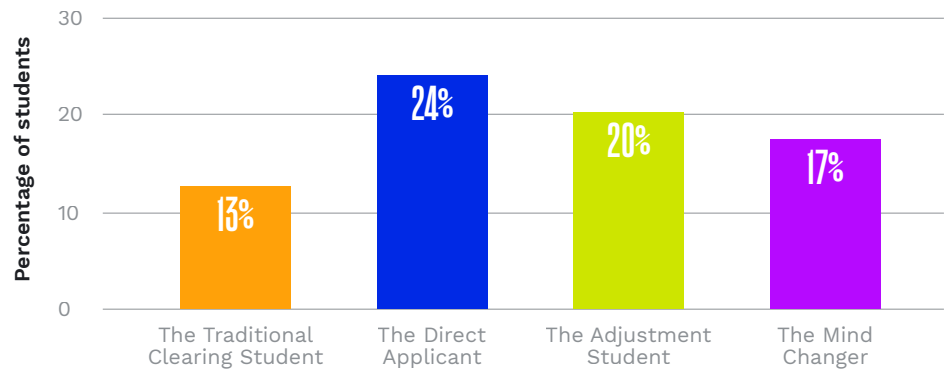
### 3. Students continue to use a huge variety of social media, to communicate with one of their most important influencers, friends.

Overall, respondents cited friends as the third most important influencer in their decision, with 59% of Clearing students saying they were influenced by their friends, and one in five indicating that friends had influenced their decision 'a lot'. The Direct Applicant was the most influenced by their

friends compared to the other profiles, with one in four indicating that they had been influenced 'a lot'. The Traditional Clearing Student was the least influenced by their friends, with just over one in ten indicating that they had been influenced by their friends 'a lot'.

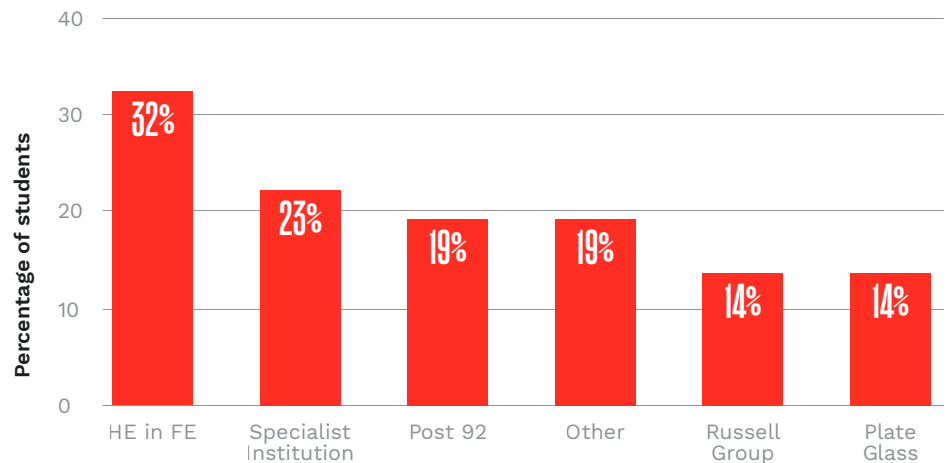
#### How influential were your friends in your decision making process?

Each profile indicated that 'friends' had influenced their decision 'a lot'.



#### How influential friends are in Clearing depends on institution type.

The types of institutions where respondents indicated that friends had influenced their decision 'a lot'.



## SECTION 3: Key Findings

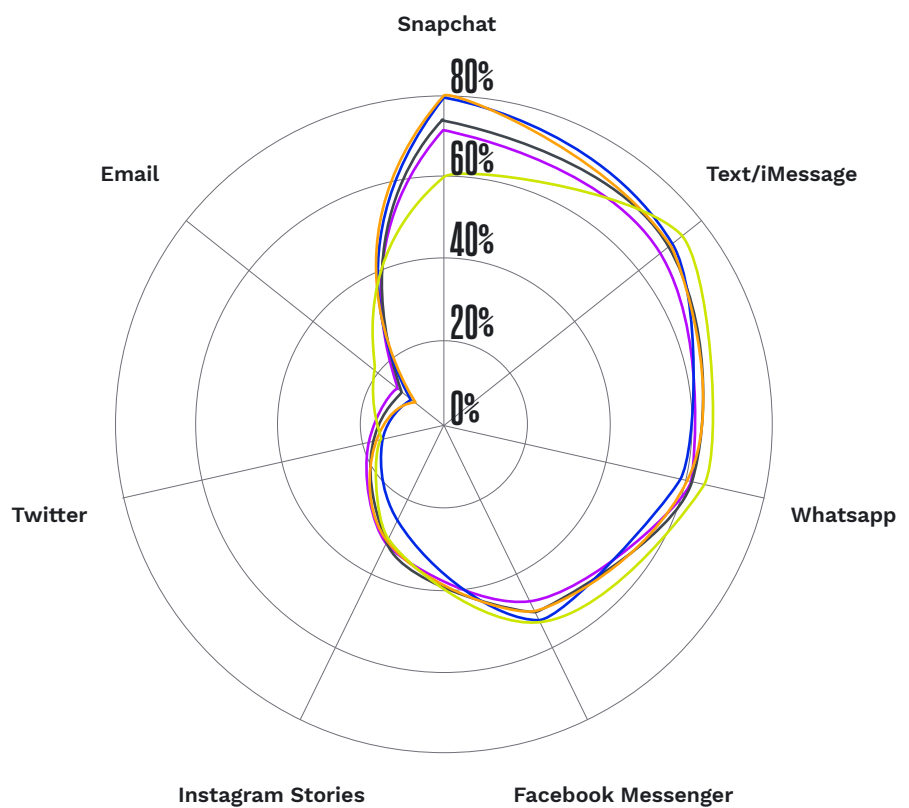
Overall, and for the first time, students were most likely to use Snapchat to communicate daily with their friends, with three in four indicating that they did so. The Traditional Clearing Student was the most likely to use Snapchat (83% daily) and The Direct Applicant least likely (59%), perhaps indicating the prevalent use of this channel amongst younger respondents. Text/iMessage continues to be the most popular daily communication method overall, with 71% using it on a daily basis.

Whatsapp proved less popular as a daily messaging tool in 2018 compared to previous reports, having dropped 9 percentiles from 2017 and 20 percentiles from 2016 to 62% overall.

### What channels do you use daily to communicate with friends?

And how often Clearing students are using social media, and the apps they are consuming continues to shift at a rapid pace.

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



## 4. Facebook continues its trend of losing relative market share amongst the Clearing student audience, with 51% using it on a daily basis, compared with 66% in 2016.

**How often Clearing students are using social media, and the apps they are consuming continues to shift at a rapid pace.**

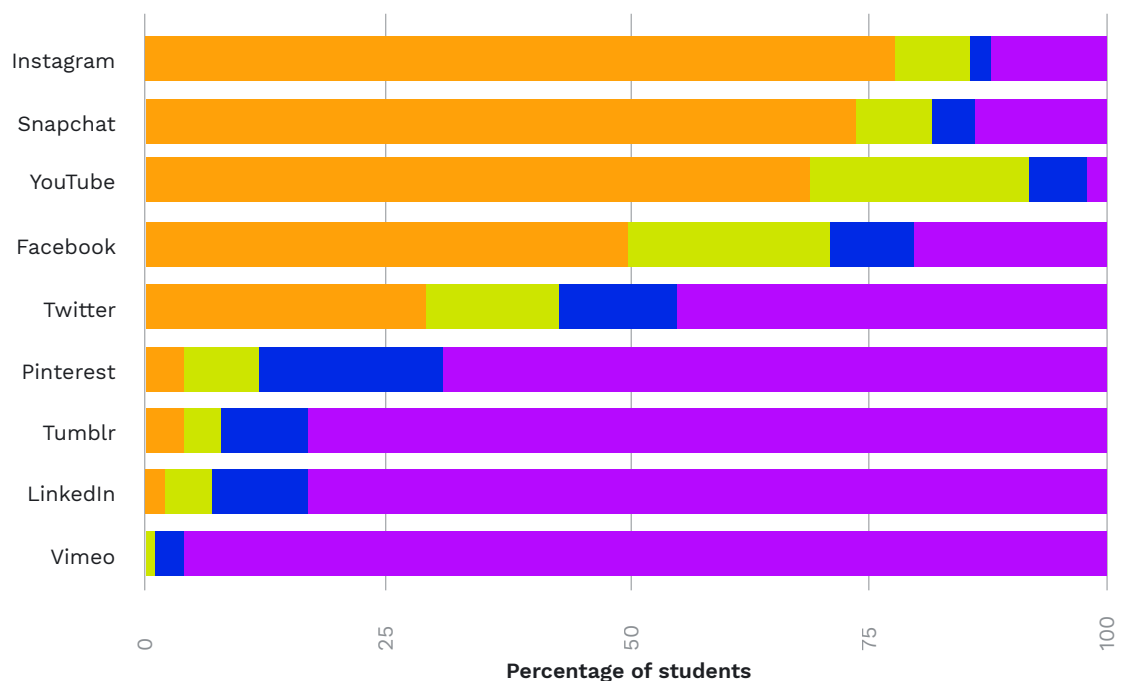
Instagram has overtaken Snapchat as the most popular social media app, with 78% of respondents indicating that they use it on a daily basis (up 10 percentiles on 2017 and 19 percentiles on 2016). As well as being the primary communication app, Snapchat holds the position of second most used, with 74% indicating that they are accessing the platform daily (up 3 percentiles on 2017).

Facebook continues its trend of losing relative market share amongst the Clearing student audience, with 51% using it on a daily basis, compared with 66% in 2016.

The 2018 findings highlight the importance of institutions being across all platforms. Instagram is used almost equally as a daily communication tool with friends, and for sharing media. With its native advertising options, engaged content creators and an active student audience, Instagram provides lots of options for creative marketers to reach students.

Respondents predominant use of Snapchat for communicating with friends highlights its importance – when coupled with the findings that friends are a key influencer, the platform has the potential to be a powerful tool for student recruitment.

### How often do you use social media?



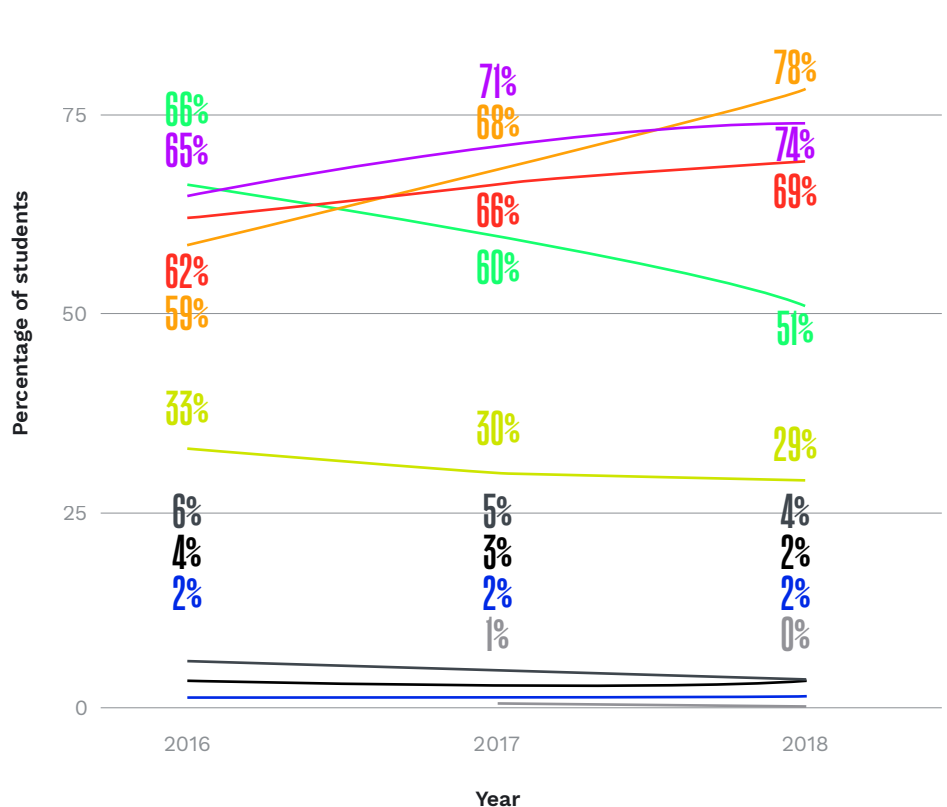
## How have trends changed since 2016?

Facebook has seen the largest decrease in daily use from Clearing students, from 66% using this daily in 2016, 60% in 2017 and now 51% in 2018.

In contrast to this, Instagram has seen a 19 percentile increase from 59% in 2016, 68% in 2017 and now 78% in 2018. Snapchat has also seen good growth in the past three years from 65% of Clearing students using this daily in 2016, 71% in 2017 and now up to 74% in 2018.

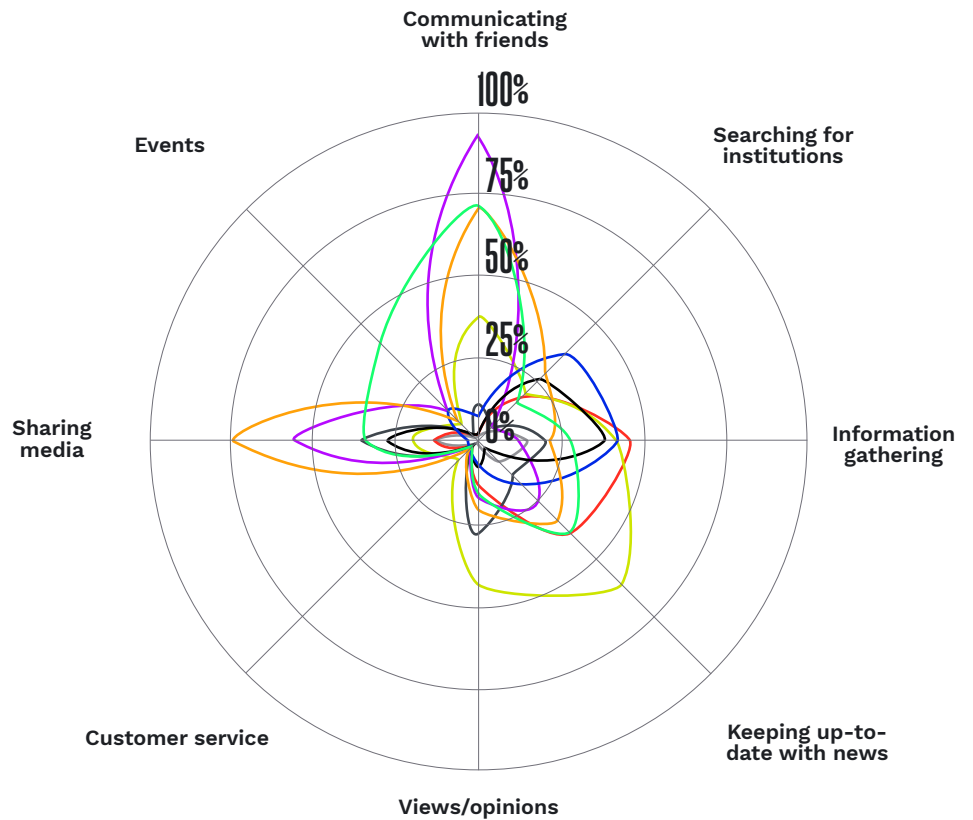
### Which platform do you use on a daily basis?

- Facebook
- Snapchat
- YouTube
- Instagram
- Twitter
- Tumblr
- Pinterest
- LinkedIn
- Vimeo



## What do you use each of these platforms for?

- Facebook
- Instagram
- LinkedIn
- Pinterest
- Snapchat
- Tumblr
- Twitter
- YouTube
- Vimeo



## Recommendations

While Clearing students are diversifying which platforms they use, it's important to note that there are differences depending on which profile you are interested in and what type of institution you are. Make sure you understand your own audience and conduct a Google Analytics audit to understand where your traffic is coming from. Use a social benchmark tool like Edurank to understand what content is working and how it compares with similar institutions. And when it comes to your marketing and influencer plans, ensure you have a solid cross-platform strategy at its core.

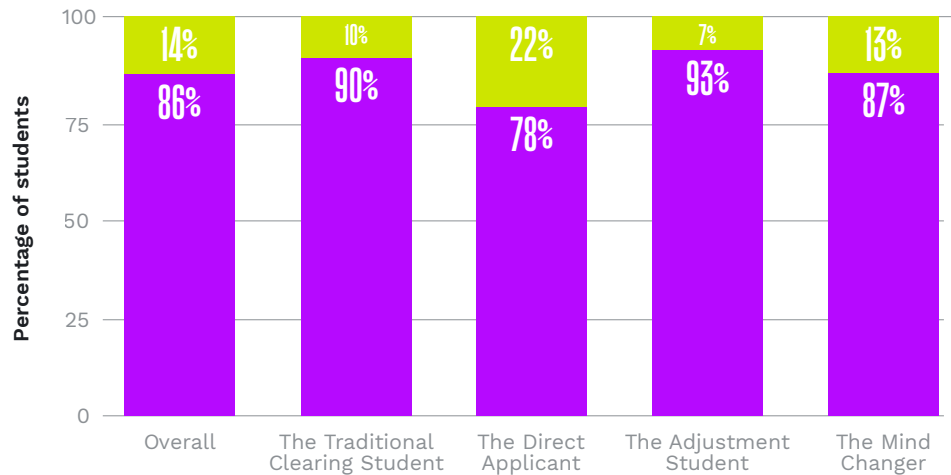
## 5. Clearing students are taking fewer affirmative actions.

This year our research found that despite students being more likely to have heard of the institution they enrolled at, they were less likely to take any actions. This indicates that institutions need to work harder to influence prospective students to take an action that will help marketers visualise, understand and market throughout their full funnel to students.

Overall, early awareness of their chosen destination was 86% in 2018 (an increase of 5 percentiles on 2016), with the largest group of Traditional Clearing Students having the greatest awareness at 90% and The Adjustment Student at 93%. The Direct Applicant had relatively low awareness at 78%. If you are a specialist institution then the challenge is greater, as Clearing students reported awareness of only 78% prior to A-level Results Day.

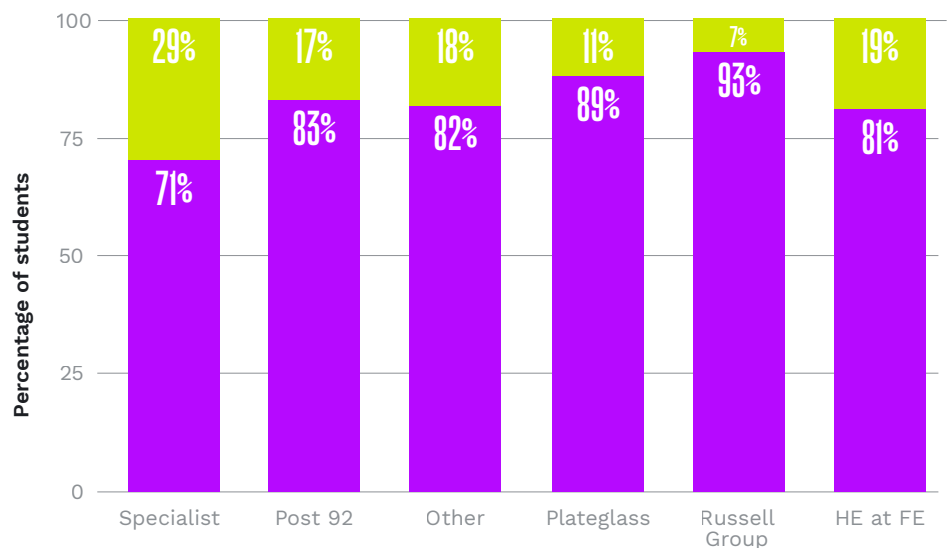
### Had you heard of your Clearing institution prior to A-level Results Day?

- No
- Yes



### Had you heard of your Clearing institution prior to A-level Results Day? (by institution type)

- No
- Yes



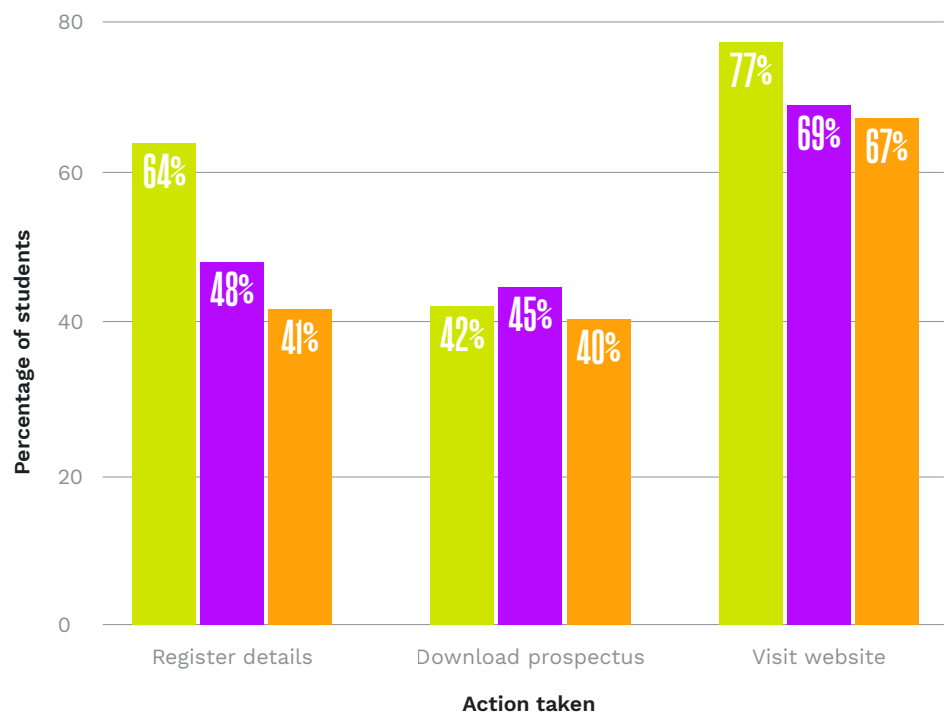
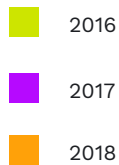
## What actions are students taking?

Students were asked if they had visited their Clearing destination prior to A-level Results Day. Despite it being a key part of most institutions strategy, just 37% of Clearing students visit their destination (down from 42% in 2016).

And once prospective students have visited the website, they are increasingly less likely to register their details. Just 41% will register their details, down from 64% in 2016.

As well as being less likely to visit an open day, Clearing students are less likely to visit an institution's website, 67% in 2018 and down from 69% in 2017.

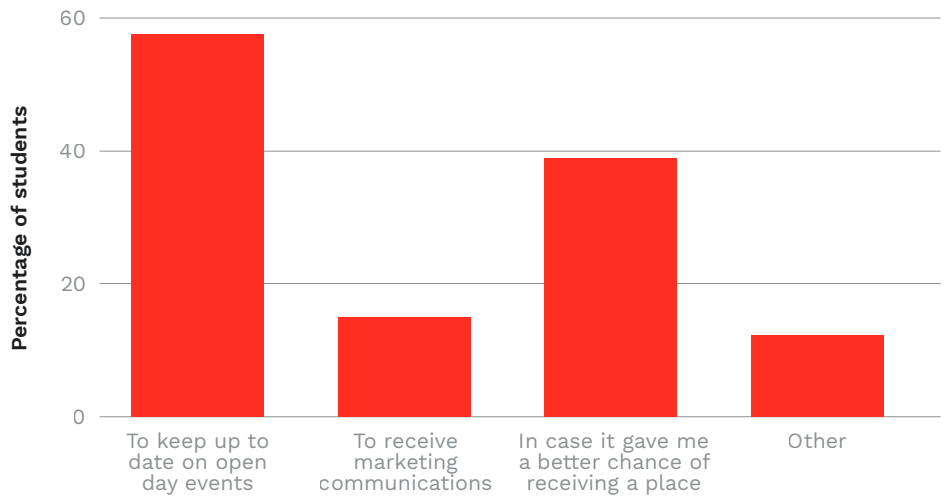
### Actions students take before Clearing



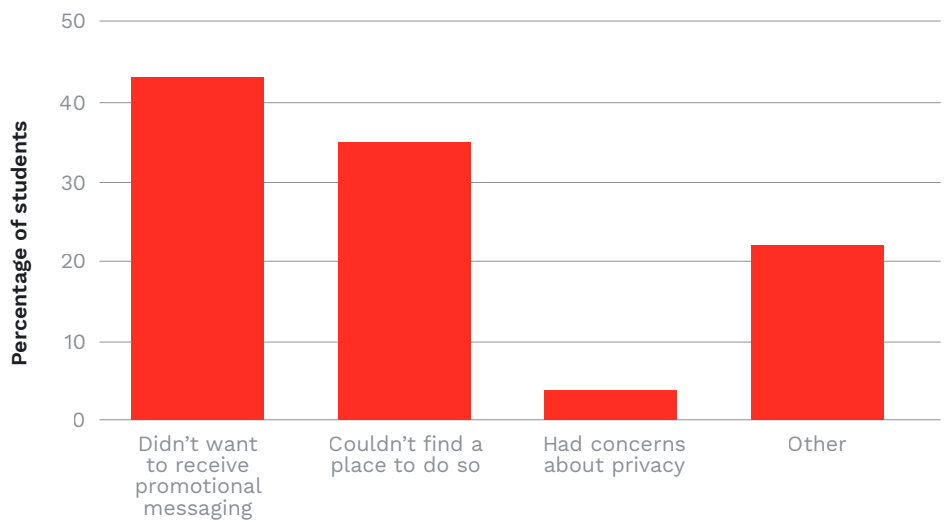
When asked why students did or didn't register their details, a strong deterrent was 'not wanting to receive promotional material' (43%) and that they 'couldn't find a place to do so' (35%). 'Data privacy' was not a particular concern (4%).

Students who did register their details, did so to keep up-to-date with Open Day events (57%) and they also felt that it gave them a better chance of receiving a place (39%).

## Why did you register your details?



## Why didn't you register your details?



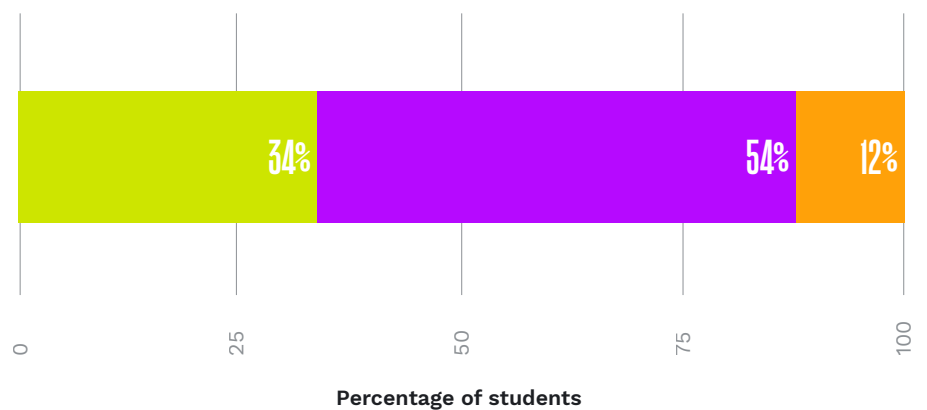


## How important are Open Days?

Whilst Clearing students are becoming more passive, what remains super important is inspiring them to attend an Open Day event. Of those who did attend an Open Day, 88% said that it influenced them either 'a little' or 'a lot'.

### How much did visiting your destination institution influence you?

- A little
- A lot
- Not at all



## Recommendations

The report highlights how important Open Days are for conversion. They create an opportunity to build an emotive connection between applicants, parents, lecturers and an institution. Link up all your digital activity and out-of-home campaigns with a real, physical experience and enable parents and applicants to build their own connection with your institution and get a feel for the on-campus vibe.

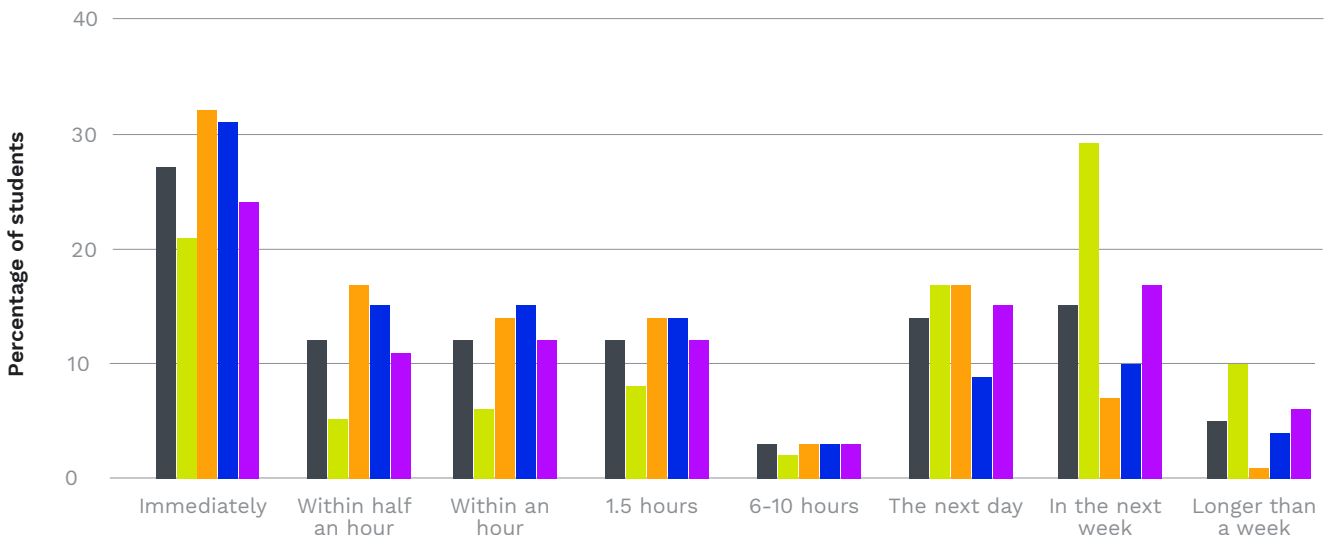
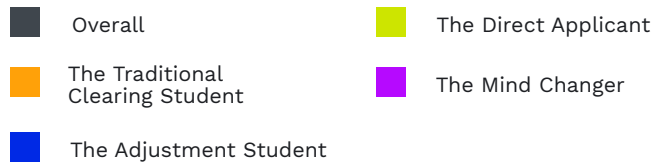
## 6. Clearing students expect a quick, clear and concise process, or they'll look elsewhere.

Clearing students expect institutions to get back to them quickly, and require a greater level of information than what is currently being supplied when they speak to someone at one of their choices.

Over half (51%) of Clearing students would expect a response within one hour of contacting an institution.

Expectations differed depending on the type of student who was enquiring. Just under two-thirds (63%) of The Traditional Students expect a response within an hour, while those who fell into The Direct Applicant profile were happier to wait, with one-third indicating that they would expect a response within the hour. Overall, less than 20% would be happy to wait longer than 48 hours.

### How soon after contacting a university did you expect a decision from the university to be made on an offer?



Bear in mind that 25% of students have confirmed their place by 12pm on A-level Results Day (30% of The Traditional Clearing Students and 36% of The Adjustment Students), there is a small, narrow window of opportunity where the optimum conversion opportunity exists, and before timeliness negatively impacts on your conversion rates.

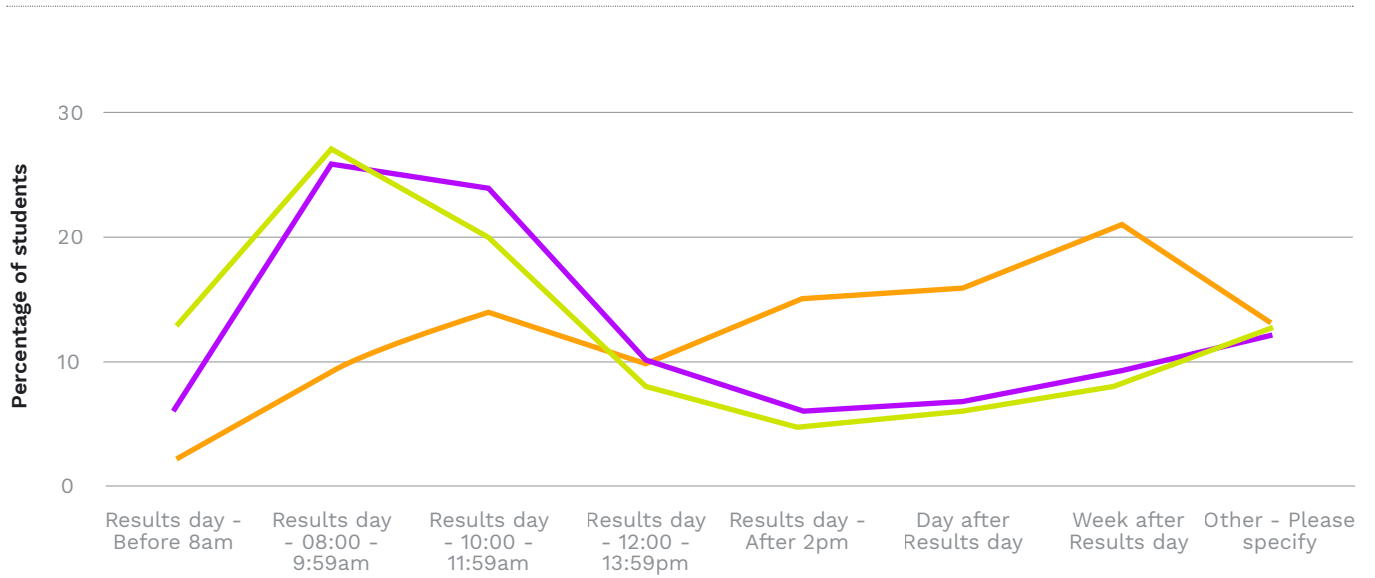
## The Clearing student timeline

### When did you:

■ Start looking for a Clearing place?

■ Secure your Clearing place?

■ Contact the first institution?



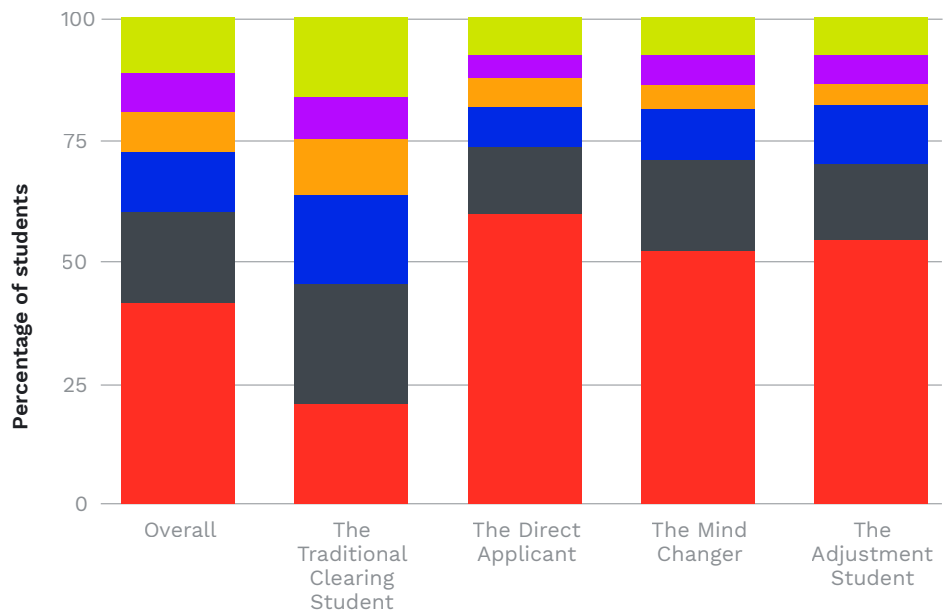
# SECTION 3: Key Findings

## How many institutions do students contact in Clearing?

As seen in previous years, students will most likely contact more than one institution. Overall, 60% contacted more than one institution.



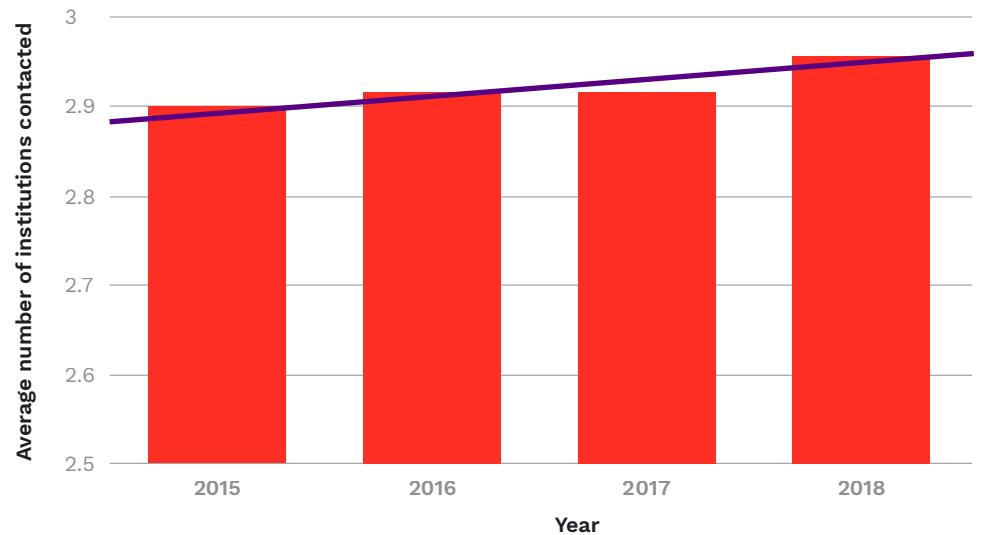
### How many institutions did you contact during Clearing?



Typically, The Traditional Clearing Student will contact far more institutions than any other group, whilst The Direct Applicant was more likely to contact just one institution. Around one-in-five Traditional Clearing Students contacted six or more institutions. Although 78% of Traditional Clearing Students contacted more than one institution, only 59% of them received more than one offer.

## How has this trend developed over four years?

**Please select the number of institutions contacted during Clearing before securing your place. This includes calling your firm and insurance choices**



**The research found that 46% of students receive more than one offer, with the Traditional Clearing Student receiving the most offers, on average 2.35.**

Students gave multiple reasons for why they called the number of institutions that they did - below are some examples:

CONTACTED 1	CONTACTED 2-5	CONTACTED 6+
Had mind set on one specific institution	Open up options	Open up options
Happy with the first one contacted	Liked all institutions	Just incase
Mind set on specific programme	Just needed a place	Tried to get into a better institution

Those who only contacted one had a clear idea of who they wanted to contact and what specific programme they wanted to study. However, those who contacted more than one were mostly trying to open up their options.

# SECTION 3: Key Findings

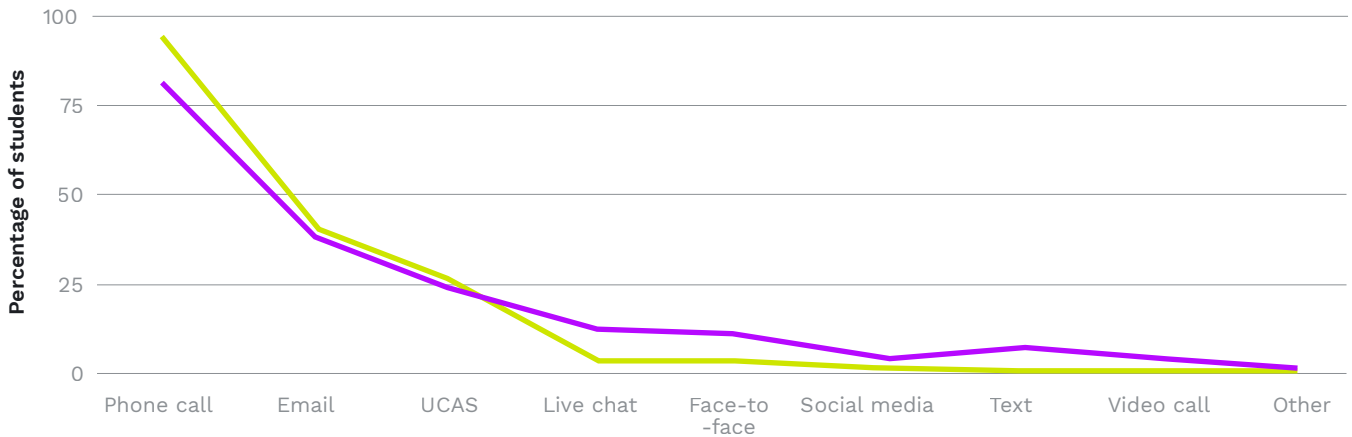
## Which method do students use to contact an institution?

The research found that a phone call is still the most commonly used and commonly preferred method to contact an institution. But, as in last year's report, respondents said they would prefer

a wider mix of contact methods - including preferences for 'live chat', 'face to face', 'social media', 'text' and even 'video call'.

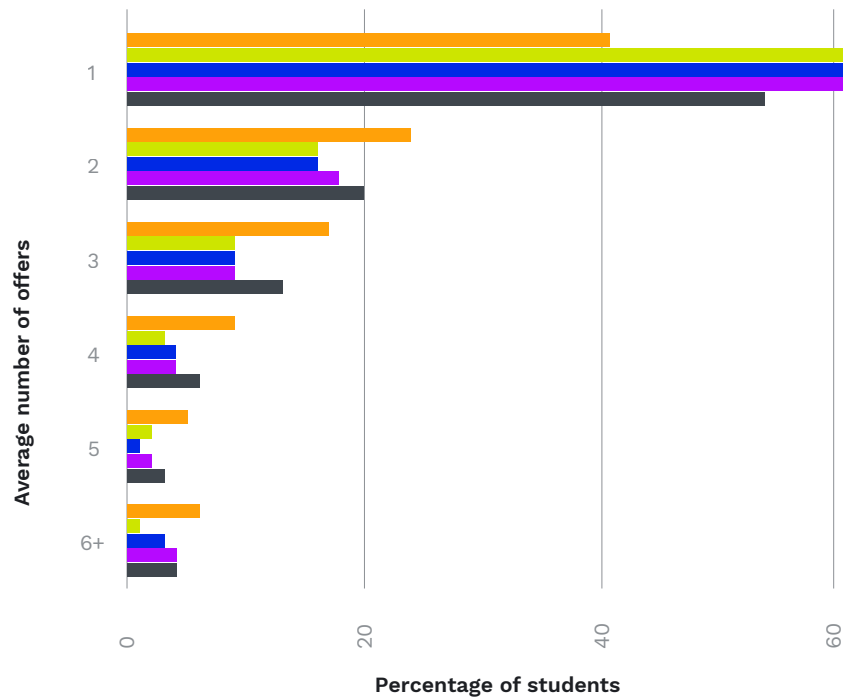
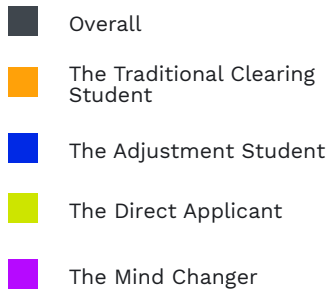
### Contact methods

- Which did you use to contact your institution?
- Which would you have preferred to use?



## How many offers are received?

### How many offers did you receive before making a decision?

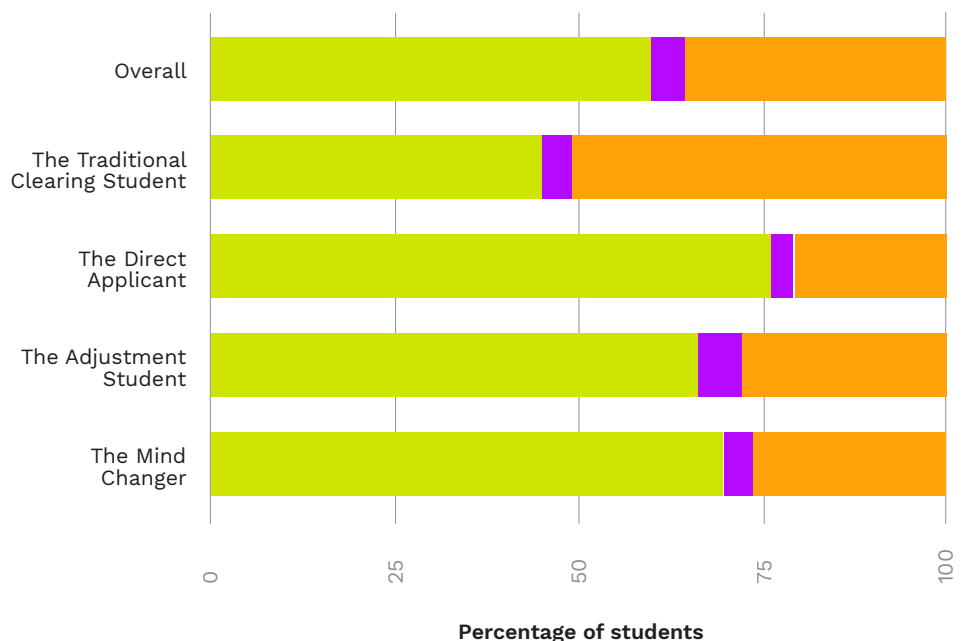


## Did you enrol at the first institution you contacted?

The majority of students (60%) went to the first institution that they called (up 5% on 2017, indicating a national trend that institutions are improving conversion on A-level Results Day). The Traditional Clearing student is the outlier here, with only

45% taking their place at the first institution they contacted. Conversely, three in four Direct Applicant students take up a place at the first one that they contacted.

### Was the institution you enrolled with the first one you contacted?

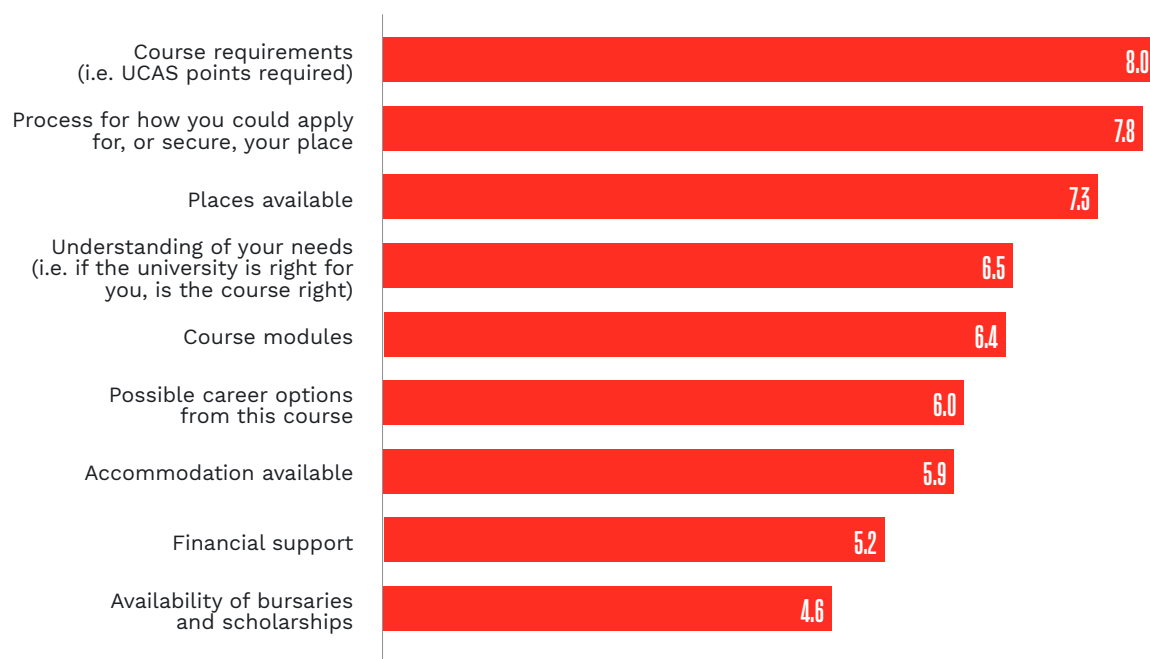


## The National Clearing Survey asked students to rate various factors in relation to the member of staff's knowledge during the phone call, on a scale of 1-10, where 10 is fully informed.

Positively, students rated staff as being knowledgeable about course requirements (8) and the process for how you can apply or secure your place (7.8), which in both cases is an improvement from 2017. However, staff were rated poorly in other areas such as 'accommodation', 'understanding of needs', 'career options' and 'financial support' (i.e. helping the enquirer 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 and less so on the needs of the student. Therefore, there are opportunities here for HEIs to become more market-oriented during Clearing and ultimately gain a competitive advantage in an increasingly competitive arena.

### Please rate (out of 10) the following factors in relation to the knowledge shown by staff at your chosen Clearing institution during telephone calls.





## Recommendations

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Most HEIs will know that students have become increasingly savvy about how they can use Clearing to their advantage, with it becoming more and more like a marketplace for students to trade their HE place and ‘shop around’. The 2018 findings corroborate this. The findings also reinforce the previous studies’ recommendations that call staff, and their knowledge of the institution, accommodation, financial support and progression, are vitally important to increasing conversion.

What is a new insight is the speed with which students wish to have a decision made. Institutions need to really understand and audit the student journey that is particular to their institution and any superfluous processes or barriers are removed.

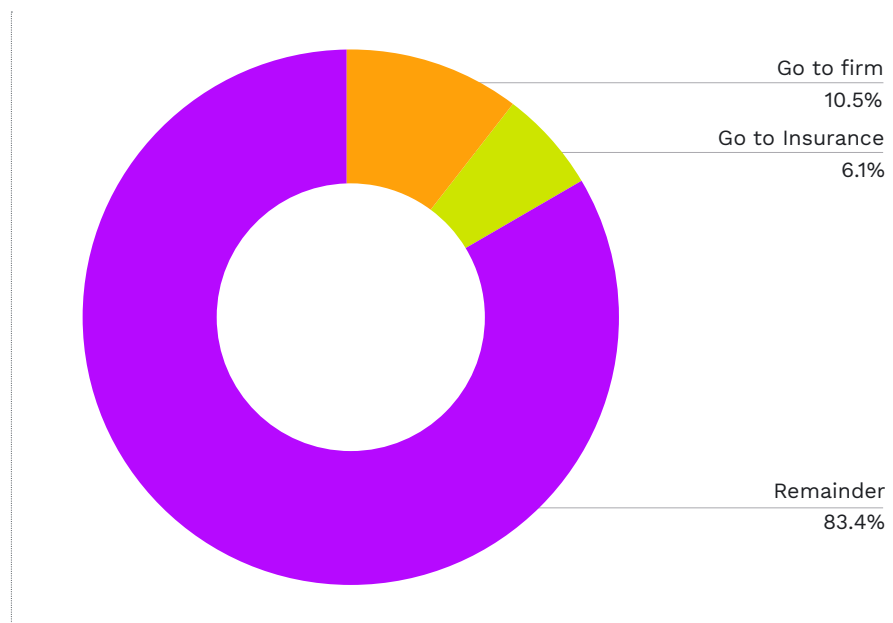
Innovative solutions such as live chat and utilising Facebook Messenger as both a lead gen and conversion tool may be a brave solution to the challenge of meeting the requirements of students on A-level Results Day.

## 7. A substantial number of students that are being rejected can still end up at their firm or insurance choice.\*

This year the National Clearing Survey wanted to uncover how many students went through Clearing, but still ended up enrolling at their original firm or insurance choice. The research found that 10.5% of

students who went through Clearing ended up going to their first choice HEI and 6% to their insurance choice.

**Percentage of students who end up back at their firm or insurance choice**

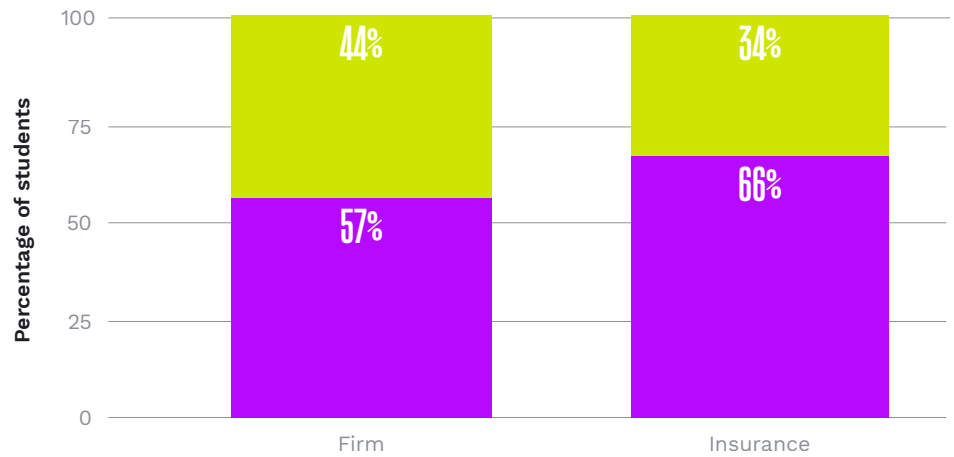


Of the 10.5% students, 56.4% of these students ended up at their first choice HEI still studying the course that they had originally applied for, while 66% of the students who ended back at their insurance institutions were studying their original subject.

\*This section does not include respondents who fall into The Direct Applicant profile.

### Percentage of students who gained a place at their firm or insurance choice, studying the same programme

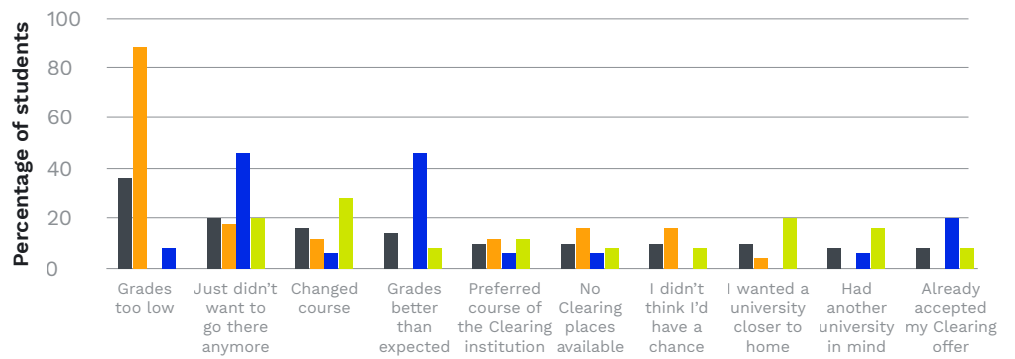
- Different course
- Same course



It is possible that even more students would have got into their original, firm or insurance choices if they had called up, however, many respondents didn't think that they would be able to. When asked 'why did you decide not to contact any of your original UCAS choices' students gave these free text responses which we have categorised:

### Why did you decide not to contact any of your original UCAS choices? (top 10)

- Overall
- The Traditional Clearing Student
- The Adjustment Student
- The Direct Applicant

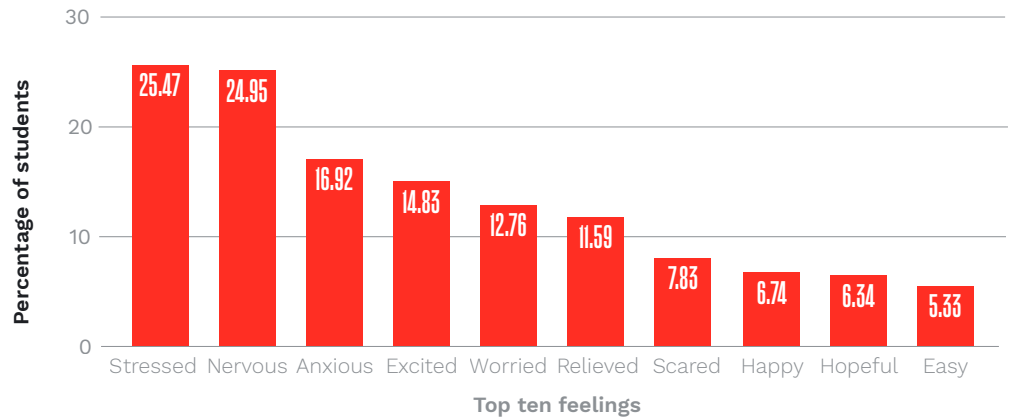


## 8. Students felt mostly negative emotions during their Clearing experience.

This year we examined the assumption that Clearing was a negative experience for students going through the process and how this might impact their choices. When asked ‘What three words would you use to describe how you felt during the Clearing

process?’, the top three feelings respondents listed were ‘stressed’ (25%), ‘nervous’ (25%) and ‘anxious’ (17%). However, there was a range of emotions students had from feeling stressed and worried, to calm, happy and hopeful.

**What three words would you use to describe how you felt during Clearing period?**



### Top 10 feelings

When you compare this to our student personas, we see The Direct Applicant appears to have the most positive emotions associated with Clearing and The Traditional Clearing Student the least positive.

	THE TRADITIONAL CLEARING STUDENT	THE ADJUSTMENT STUDENT	THE DIRECT APPLICANT	THE MIND CHANGER
1	Stressed	Nervous	Excited	Nervous
2	Nervous	Excited	Nervous	Stressed
3	Anxious	Stressed	Stressed	Anxious
4	Worried	Anxious	Anxious	Excited
5	Relieved	Worried	Happy	Worried
6	Scared	Relieved	Easy	Relieved
7	Excited	Happy	Relieved	Happy
8	Upset	Scared	Worried	Hopeful
9	Hopeful	Hopeful	Hopeful	Calm
10	Disappointed	Calm	Calm	Scared

Key Positive Negative

## Recommendations

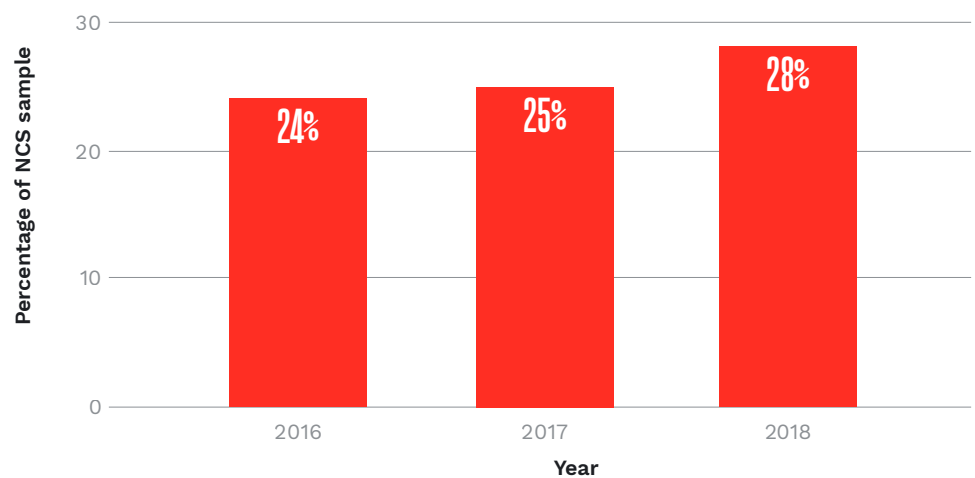
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Don't forget to give prospective students an empathic customer experience during what is predominantly a stressful time. Consider a strategy that is aimed at the heart rather than the head. Analyse the wealth of data obtained across the two-year student recruitment cycle to discover the key mood states and devise a creative marketing plan that utilises the latest in AI and personalisation to deliver mood-enhancing comms at the right time, in an impactful way.

## 9. There are more mind-changers going through Clearing than ever before, with students increasingly altering their subject choice.

The Mind Changer profile has seen consistent growth over the past three years, from making up 24% of our sample in 2016 to 28% in 2018.

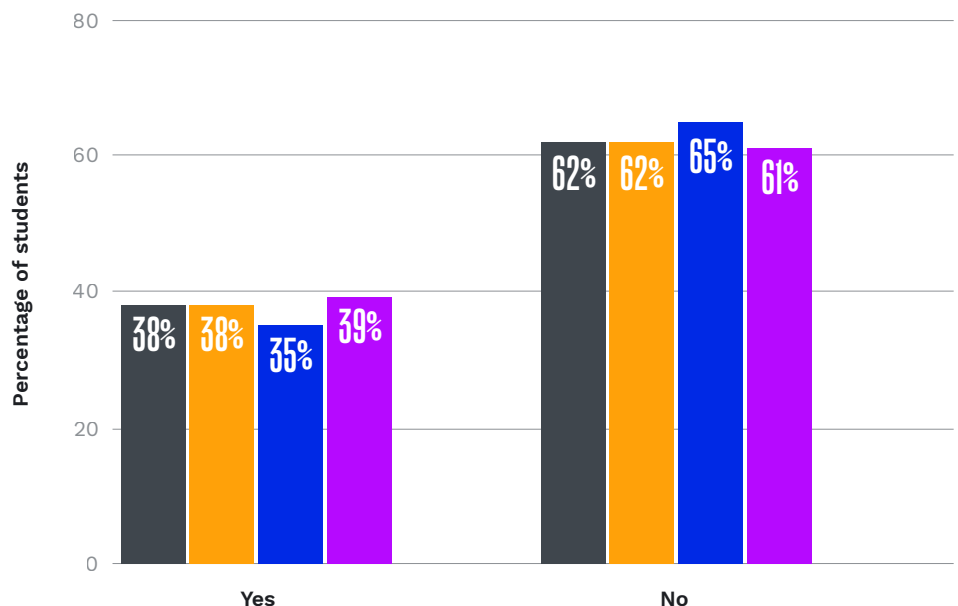
### Growth of the Mind Changer profile



Just over a third of students used Clearing as an opportunity to change their subject choice (38%), however, the reasons for this differ depending on which persona we examine.

### Did you change your original subject choice?

- Overall
- The Traditional Clearing Student
- The Adjustment Student
- The Mind Changer

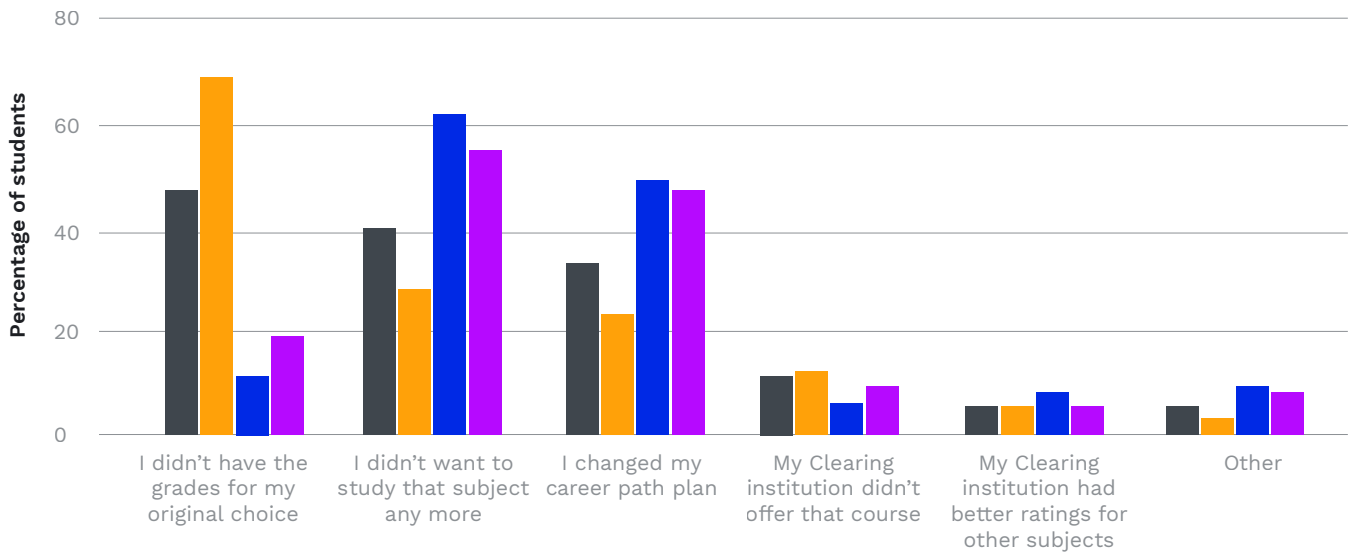


## How has this trend developed over four years?

The Traditional Clearing Students are often forced to change their subject, with 69% of this group having changed their subject because they no longer had the grades for their preferred programme. Whereas, The Adjustment Student and The Mind Changer do this because they no longer want to study that subject (62% and 54% respectively) and changed their mind about their career path (49% and 47% respectively).

This trend presents both challenges and opportunities for Higher Education institutions who will need to have extra focus on retention of students who have made a firm acceptance of their offer, whilst also recruiting students who are open to changing their course and actively looking for new options post-A-level Results Day.

## Why did you change your subject choice?



# Conclusion

**This is the fourth, and the most insightful and representative, edition of the annual National Clearing Survey, providing year on year benchmarks and 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 findings will form the backbone of a cross-channel, cross-platform marketing strategy that addresses the needs of their prospective students.**

Clearing has traditionally been seen as a route into Higher Education for students who have not achieved the grades required, but increases in a new record-breaking Clearing cycle were driven by a 3.4% increase in direct acceptances.

While overall acceptances via the main scheme are showing a long-term trend of decreasing, in addition to changes in demographics meaning that fewer 18-year-olds are entering UCAS, there are opportunities for institutions to grow by attracting more direct applications and older students entering Higher Education. Don't miss the opportunity to grow and focus on a long-term content-led strategy that is targeted at The Direct Applicant and using the insights contained within this report, address the unique concerns, barriers and influencing factors of this group, armed with the knowledge of which platforms and devices that they are using and when.

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 findings. Each of our partnering institutions will have received their own data with which to do so and partnering with the National Clearing Survey is free and open to all HEIs who will have open vacancies during Clearing 2019.

These findings offer a fascinating insight into the rapidly evolving behaviours of Clearing students and how they consume media. Students 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 conversion to enrolments during this period.

To reflect the changing attitudes, methods and technology adoption, the National Clearing Survey will be updated and repeated in 2019.



## Take Part In The National Clearing Survey 2019/20

To reflect the changing attitudes, methods and technology, the National Clearing Survey will be updated in 2019. The Insights Division at Natives Group are registering institutions who wish to take part and collaborate in the National Clearing Survey 2019/20. There are a number of benefits to your institution if you choose to participate:

- You'll receive a survey to share with your 2019 Clearing students
- Be the first to receive a copy of the full report before non-participating institutions
- 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.  
[www.nationalclearingsurvey.com/take-part/](http://www.nationalclearingsurvey.com/take-part/)

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