

2021 END OF CYCLE



INSIDE THE MINDSET OF 2021 CLEARING APPLICANTS

Clearing Survey Report

UCAS



INTRODUCTION

This year we wanted to understand how students had navigated Clearing in 2021 and whether there were any changes as a result of the disruption caused by COVID.

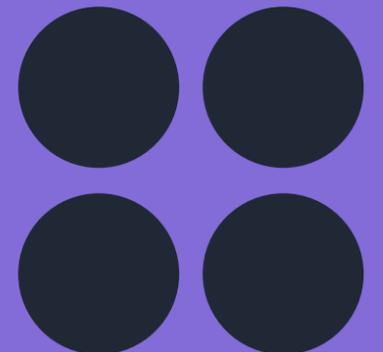
We found that, for some, Clearing continued to shift towards a way of making a choice, rather than simply a solution to an unexpected problem.

From where the prospective students sit, Clearing isn't part of the marketing or recruitment cycle, it is a step on their path to the right course and university for them.

They told us that their choices were often less firm than they had been, and COVID has had an impact on emotional drivers and breaks, which will no doubt continue for many cycles to come.

Prospective students were keen to engage in direct and indirect contact with universities and trusted sources earlier, so they could understand how to change their plans through the Clearing process.

Read on to discover the key insights and action-led recommendations based on our Clearing 2021 survey results.



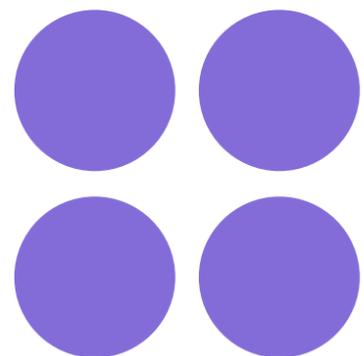
THE SAMPLE

The survey data referenced in this report comes from UCAS' 2021 End of Cycle Clearing Survey.

This survey was sent out in September 2021 to a sample of 2021 cycle applicants who had obtained a place at a university or college using Clearing.

In total, over 3,000 applicants took the time to tell us about their experience of using Clearing to find a place at a university or college, as well as what factors were important to them when searching for a place in Clearing.

Their responses were weighted to represent the entire population of 2021 cycle applicants who had found a place at a university or college using Clearing, accounting for differences in response rates observed in different characteristic groups, such as gender, age, and ethnicity.



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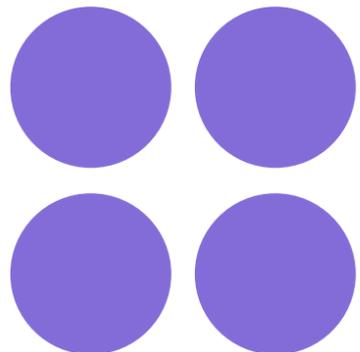
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**How those using Clearing
found what they needed,
and how it found them**

KEY INSIGHTS



More applicants were going 'direct' for information and around a third knew nothing about the university they secured a place at through Clearing

They both **actively searched** and **passively discovered** what they needed

- ▶ Their most **cited sources of hearing** about Clearing places were word of mouth and then the UCAS website

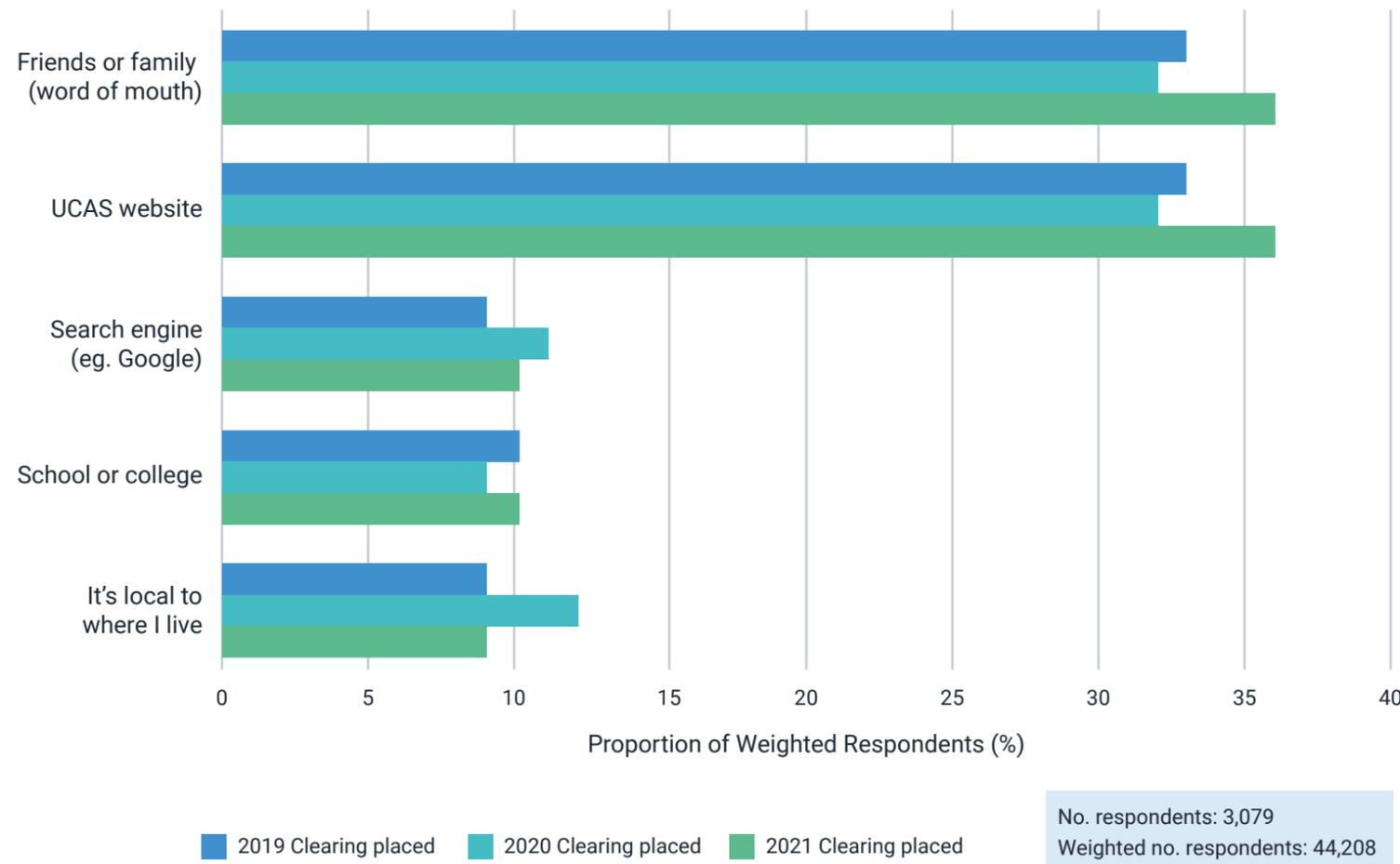
When they were **looking for a place**, university and college websites, the ucas.com search tool and Clearing Plus were go-to destinations

Going 'direct' meant a range of things to them, potentially inspired by filling gaps in information about a university quickly

- ▶ Speaking to a person
- ▶ Speaking to the university
- ▶ Speaking to UCAS
- ▶ There was an **increase in those who had contacted universities by phone**

When they were on their digital travels on social media, they tripped over advertisements from universities there, rather than using it as a place to search for Clearing places

Friends and family and the UCAS website were by far the most cited sources of hearing about Clearing places



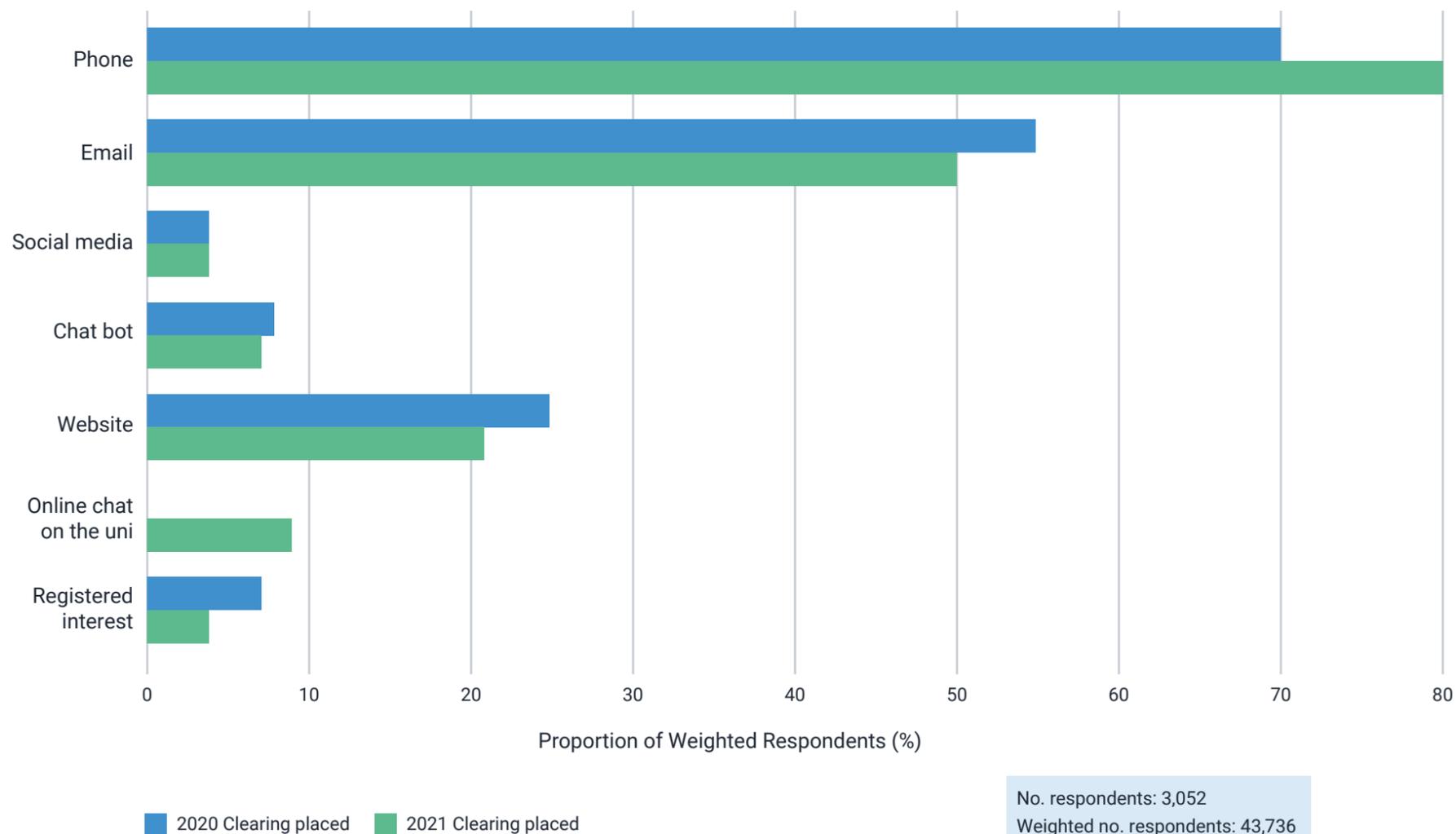
Where did you first hear about the university or college you found a place at in Clearing?
(Top five responses vs 2020 and 2019)

- ▶ In 2021 the largest single proportion, 36%, first heard about the university or college they found a place at during Clearing from **friends and family**, a slight increase on previous years
- ▶ The second highest single proportion, 21%, heard about it via the **UCAS website**
- ▶ Similar proportions cited 'Search engine', 'School or college' and 'It's local to where I live'
- ▶ In terms of other sources, there was a significant drop off after 'It's local to where I live'

36% first heard about the university or college they found a place at during Clearing from friends and family



Those who **spoke to a person on the phone** during Clearing had increased



How did you contact universities or colleges to discuss finding a place through Clearing?
Please select all that apply.

When asked how they contacted universities or colleges to discuss finding a place through Clearing, **speaking to a person directly by phone** had increased, seemingly at the expense of other areas like email and website

Phone:

70%  **80%** 
2020 2021

Email:

55%  **50%** 
2020 2021

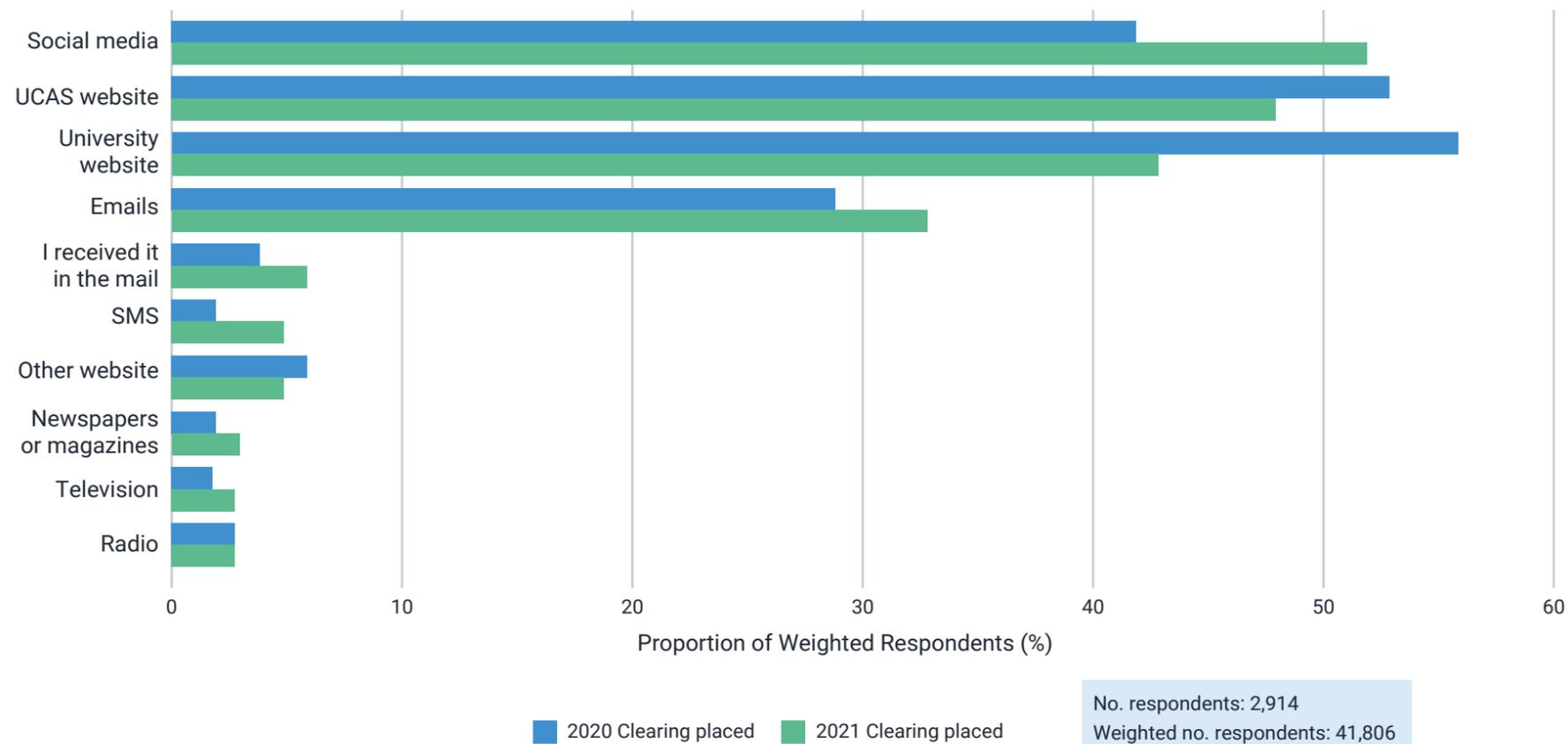
Website:

25%  **21%** 
2020 2021

Speaking to a person directly by phone had increased



Advertisements introducing universities with Clearing places were seen through social media,ucas.com, university websites and email



In which of the following places, if any, did you see advertisements from the uni or college you're currently placed at during the Clearing period? Please select all that apply.

When asked 'In which of the following places, if any, did you **see advertisements** from the uni or college you're currently placed at during the Clearing period'

Social media had increased:



The UCAS website dropped slightly but was still 2nd:



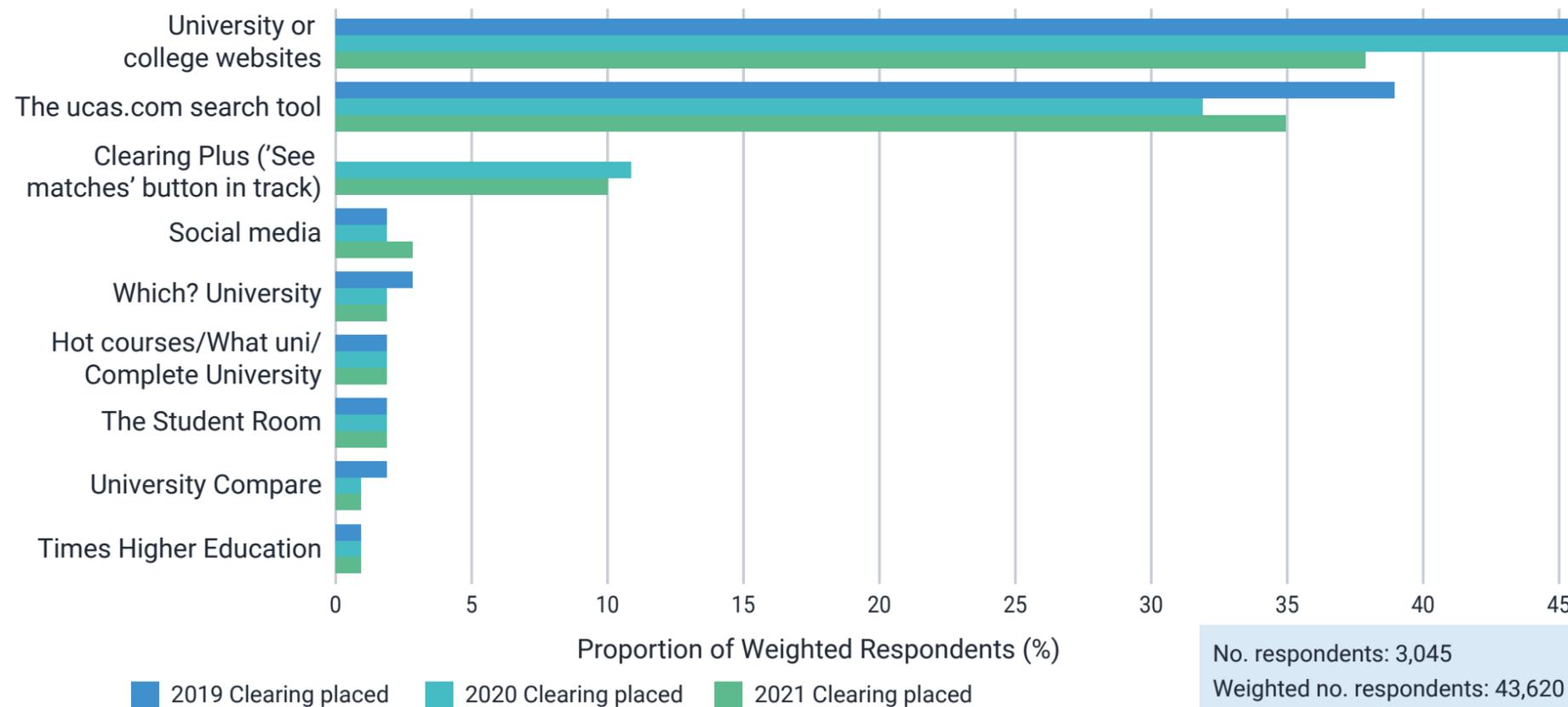
And emails had increased to a third:



Social media had increased from 42% in 2020 to 52% in 2021



Going direct to university or college websites and [ucas.com](https://www.ucas.com) were the 'go to' sources to search for places in Clearing



When you were looking for a place in Clearing, where did you search for places?

- ▶ University or college websites were consistently the most cited sources when looking for places – **46%** for 2019 and 2020, and **38%** in 2021
- ▶ Second was the [ucas.com](https://www.ucas.com) search tool at **35%** in 2021
 - And Clearing Plus (option added in 2020) at **10%**
- ▶ Other sources had much lower percentages, including the following at **2%** each
 - Which? University, Hotcourses/Whatuni/Complete University Guide and The Student Room

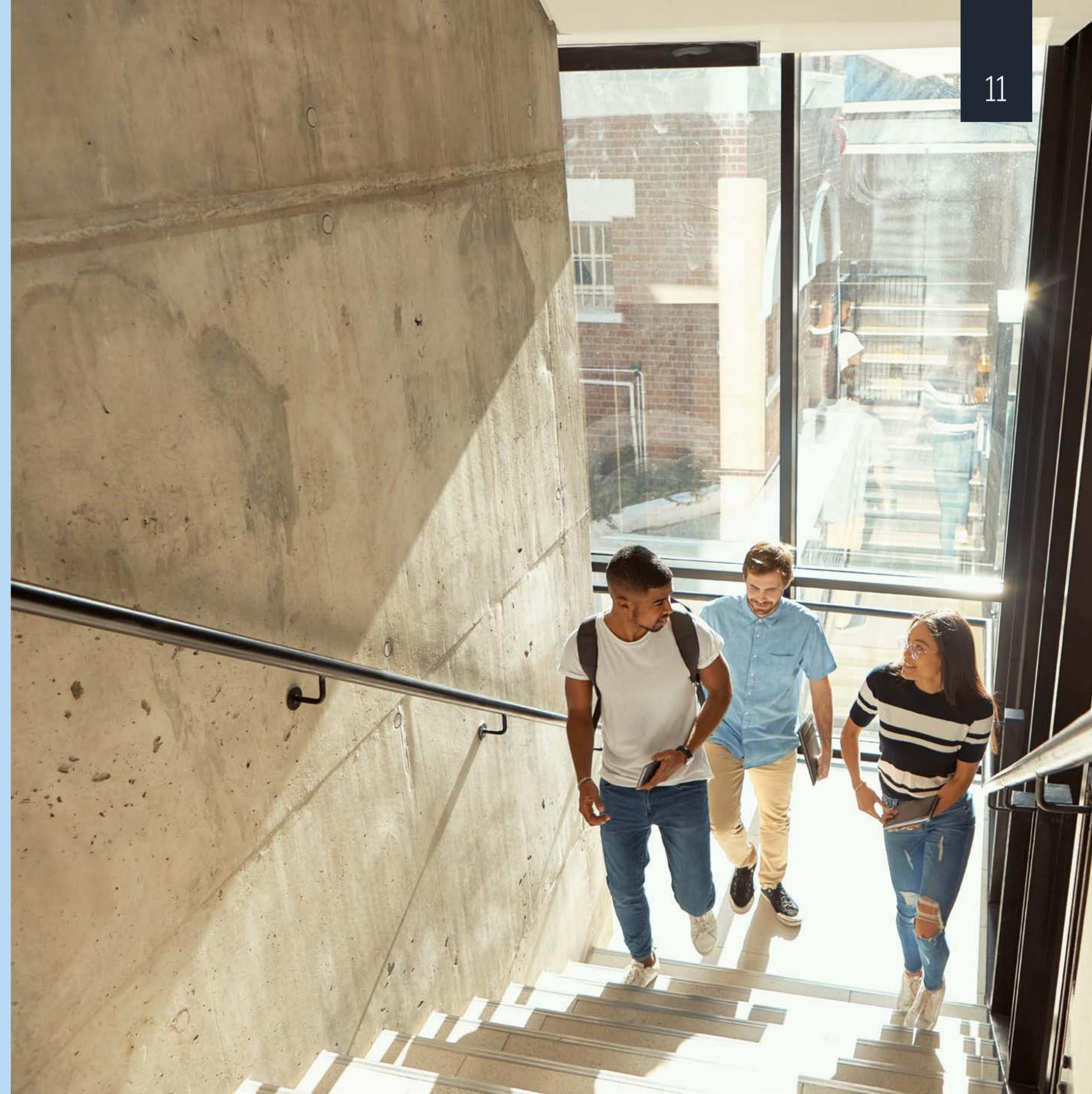
The [ucas.com](https://www.ucas.com) search tool was the 2nd highest 'go-to' after university/college websites, followed by Clearing Plus



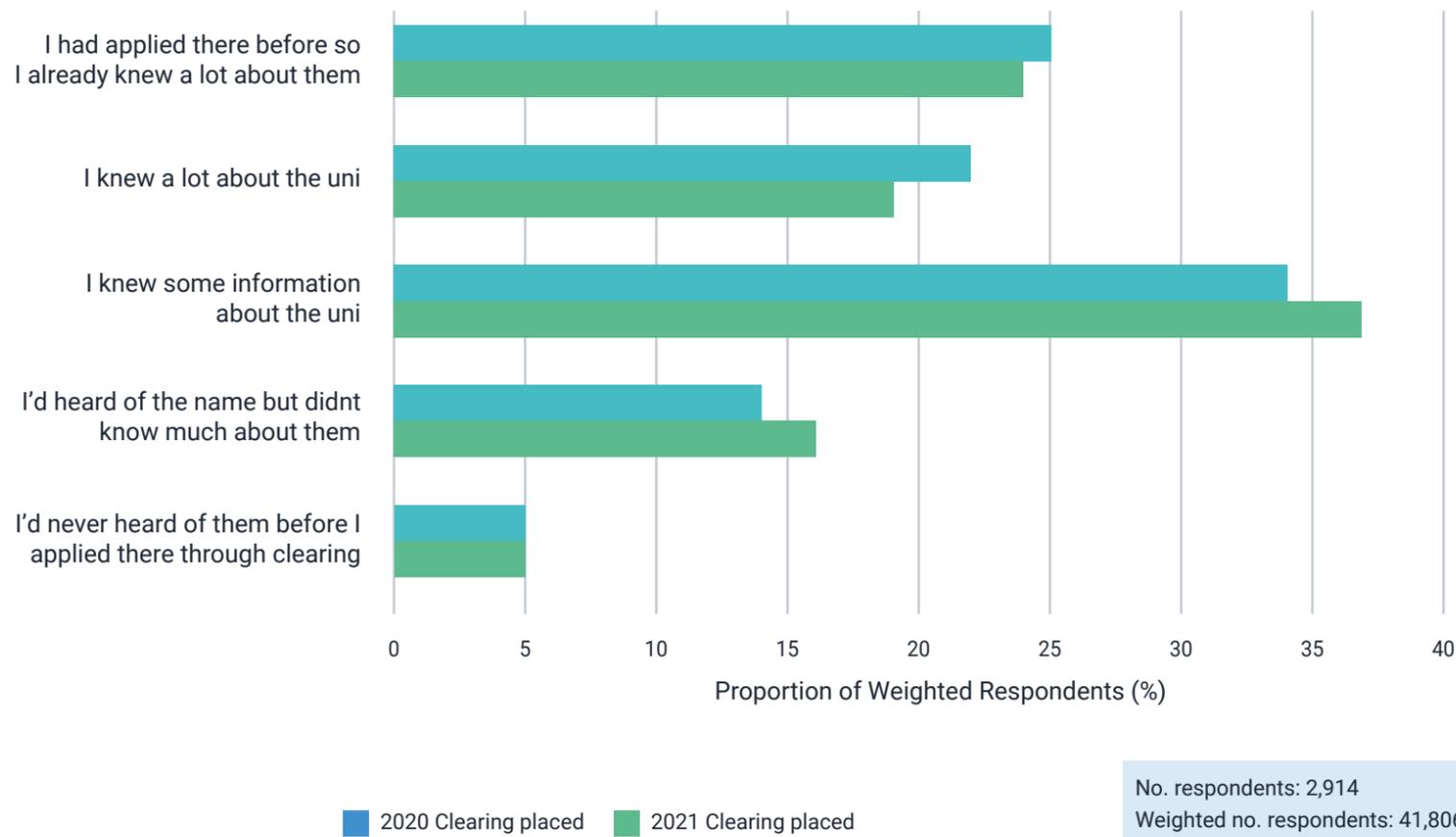
In 2021, Clearing Plus was used by more prospective students and they were more positive about it

- ▶ Out of those who used Clearing Plus to view course matches
 - ✓ **75%** would recommend it to a friend (71% 2020)
 - ✓ **94%** found it 'very' or 'fairly useful'
 - ✓ **89%** were offered a place on a course they had expressed interest in through Clearing Plus (84% 2020)
 - ✓ **64%** found course matches that interested them
- ▶ Location in relation to home was important for their decision making – when asked about features they would add to Clearing Plus
 - A third said 'Ability to limit results by distance or drive time' 

89% were offered a place on a course they had expressed interest in through Clearing Plus (84% 2020)



Over half of respondents (56%) said that they had researched the university or college they were placed at through Clearing when they made their original five choices



Thinking about the university or college you were placed at through Clearing, how much do you feel you knew about them before applying to them through Clearing?

- ▶ We asked three key questions about when they researched their Clearing options
 1. Over half of respondents (56%) said they had researched the university or college they were placed at through Clearing **when they made their original five choices**
 2. Over half of respondents (51%) said 'I researched the uni **before I got my results**'
 - But, almost a third, (32%) said they 'Researched the uni **after I got my results**'
 3. Although 37% felt they **knew 'some information' about the university** they were placed at
 - They were slightly less likely in 2021 to feel they knew a lot
 - And slightly more likely to feel they didn't know much

Although over half had prior knowledge of the university they were placed at in Clearing, almost a third got to know their university after they got their results





The factors which were important to applicants when choosing their place in Clearing

KEY INSIGHTS



No doubt impacted by the unpredictability of COVID, support, proximity to home and teaching quality were becoming more important for some

This won't be the case for everyone, but for some there seemed to be a shift in consideration factors towards **exploring options closer to home, but not necessarily at home**

They appeared to be interested in **needs around support**, and knowing what would be available to them if they were away from home

This cohort have had a **disrupted education** for the last two years and

- ▶ Have not been able to take access to teachers for granted
- ▶ Their teachers had to translate in-person lesson plans into online content quickly

Factors around **teaching and teaching quality** at university had increased in importance

When choosing a place in Clearing **location had become more important.** Not necessarily staying at home, but being able to get home

Location was important and factors relating to **distance from home** had increased in importance (very important/important)

'The location in the town or city'



'Distance from home'



'Cost of travelling between my home and uni'



But they seemed to want to be able to **get home easily**, and afford to get home, but not necessarily live at home

'Option to continue living in my current home'



'The option for me to stay at home and learn remotely'



Location was important and factors relating to distance from home had increased in importance (very important/important)



30%

said the COVID outbreak made them more likely to choose an institution closer to home

Knowing what **support** was available mattered to them when choosing during Clearing: academic, financial, and mental health and wellbeing

▶ A range of **support** was important (very important/important)

– ‘Academic support available’

81%

– ‘Financial support available’

71%

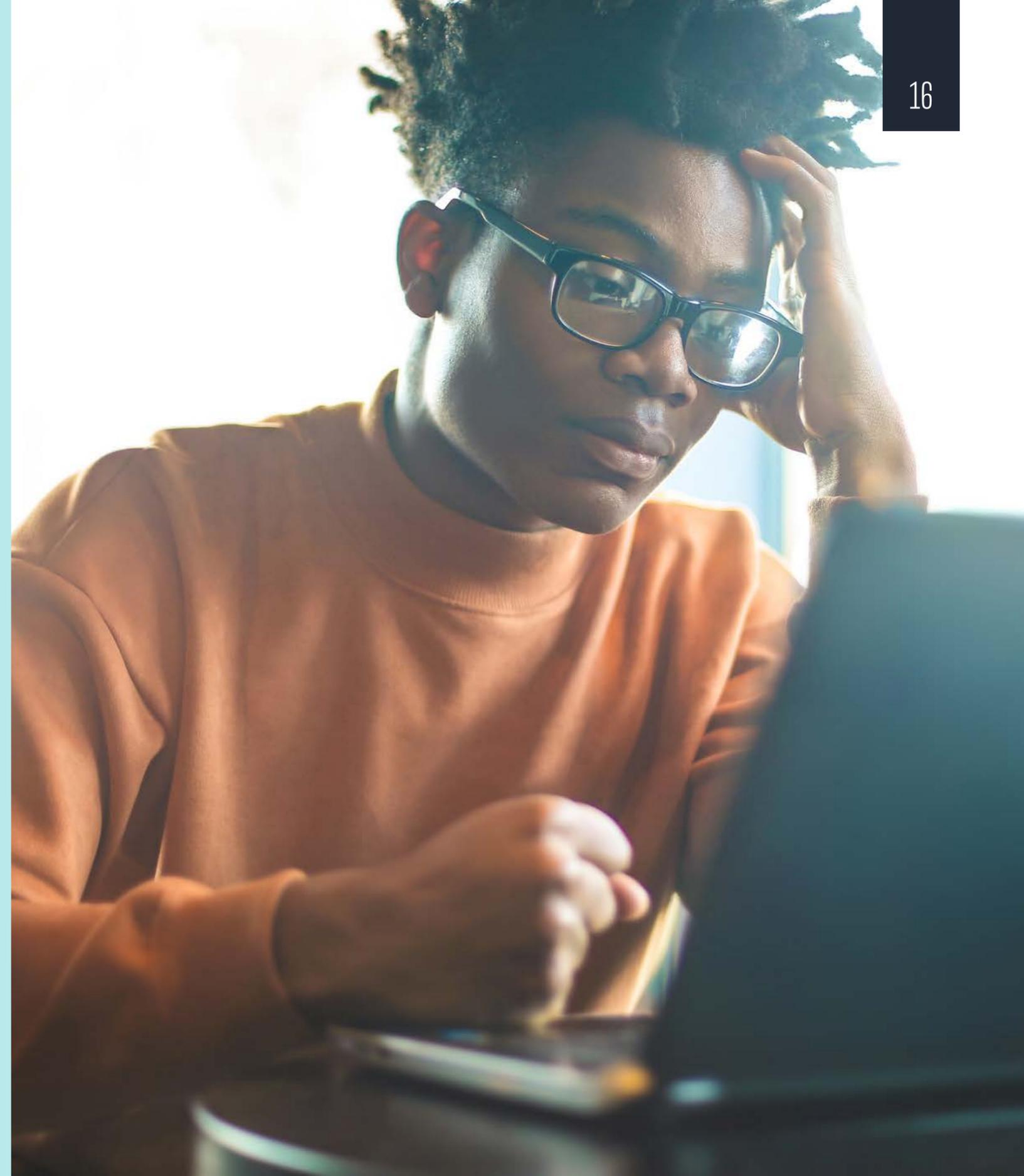
– ‘Mental health and wellbeing support available’

62%

– ‘Availability of support for other personal circumstances’

40%

‘Academic support available’
81% – the single highest
proportion in 2021



Sustainable practices and the diversity of the university or college also rank highly in importance

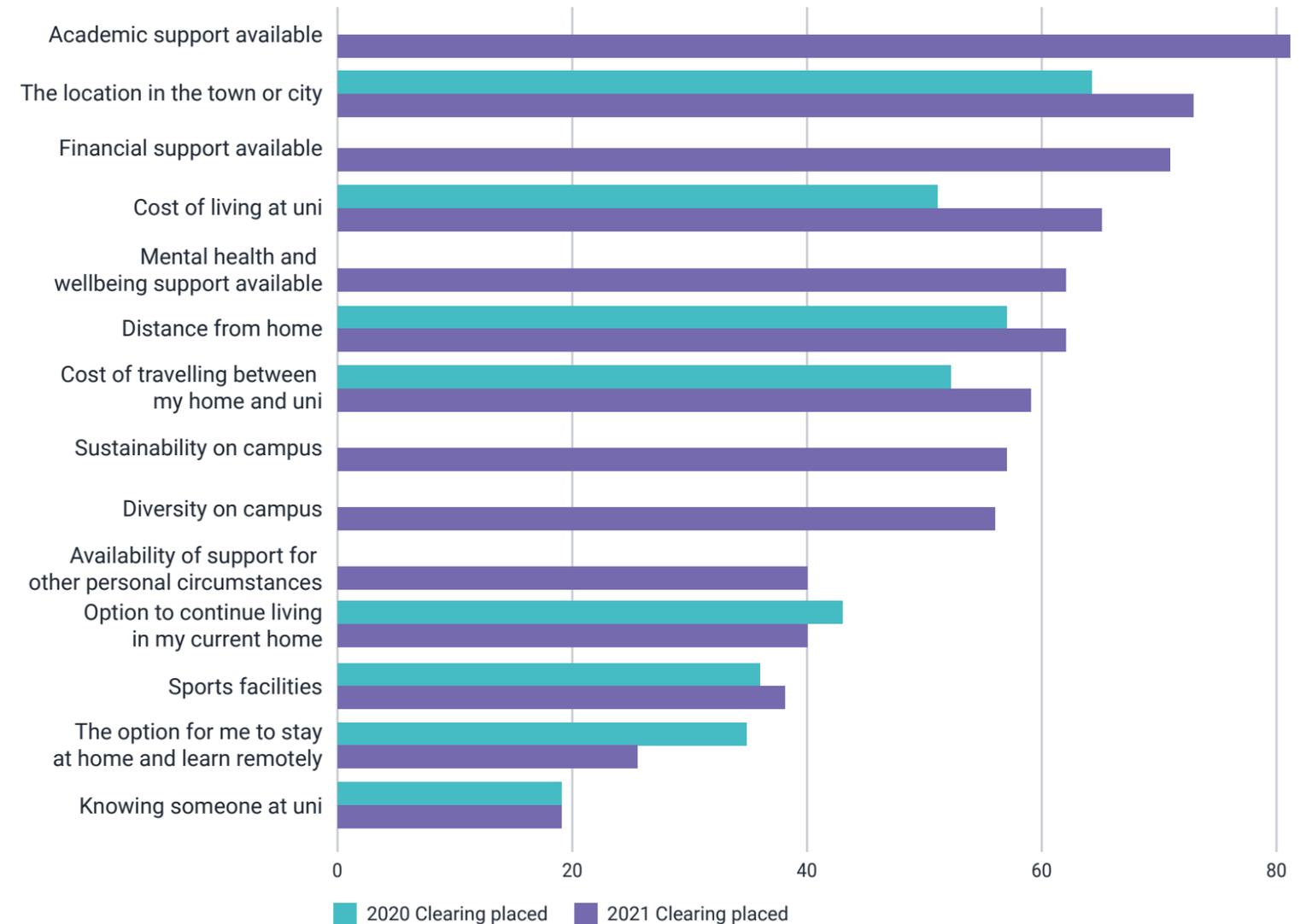
► For over half of respondents, **sustainability and diversity** were important (very important/important)

— ‘Sustainability on campus’

57%

— ‘Diversity on campus’

56%



How important were the following lifestyle factors when choosing your place in Clearing?

Very important + Important

Top 10 responses in 2021 & year-on-year results where available

After the university offering the course they wanted, **teaching** was critical and had increased in importance

When asked about factors relating to the university and the course, factors relating to teaching had increased in importance (very important/important)

'Quality of staff/teaching'



'Quality of teaching facilities'



'Good student reviews'

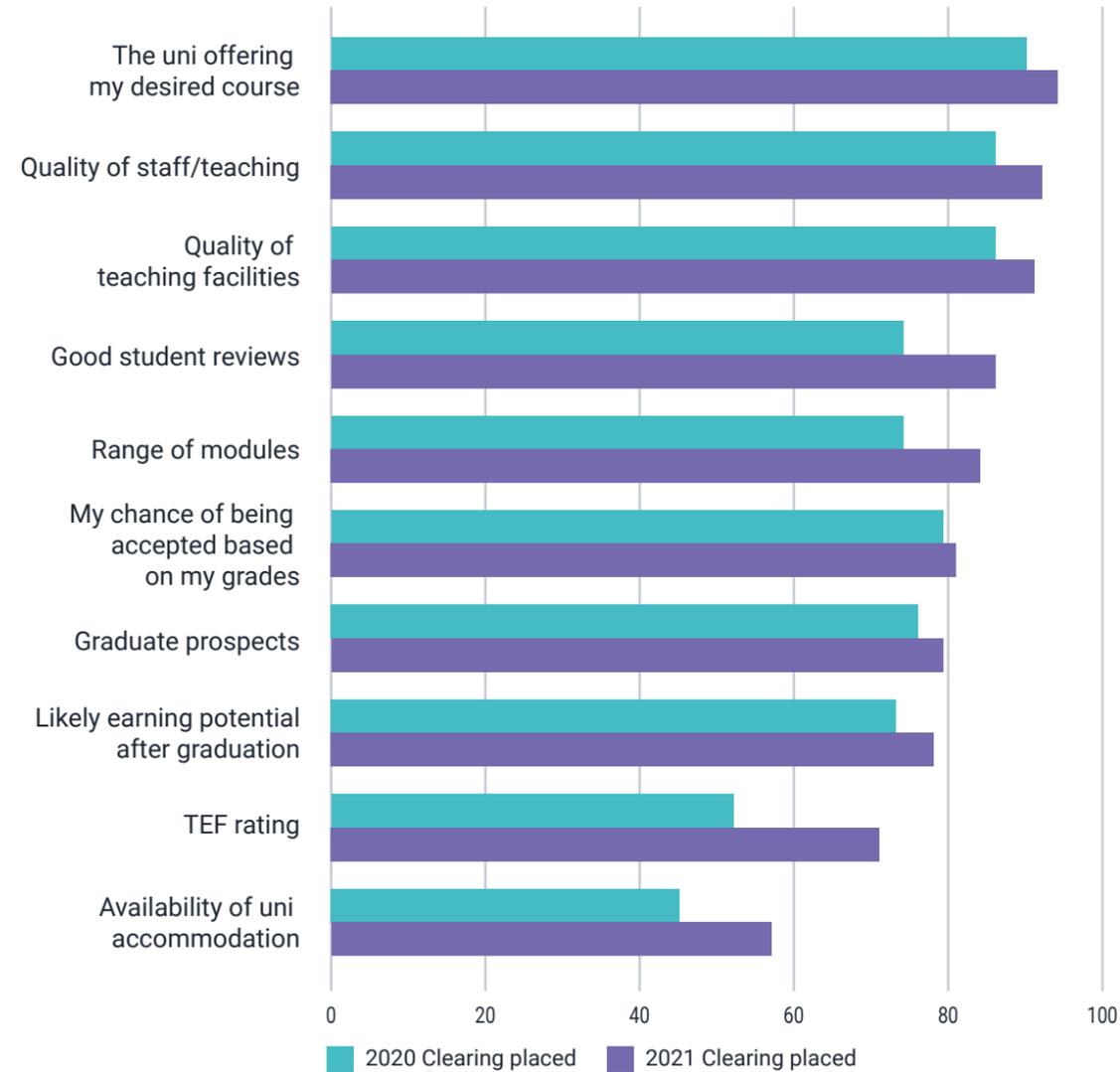


Interestingly the most significant shift was an increase in the importance of the TEF rating

'TEF rating'



Range of modules had also increased in importance



How important were the following factors when choosing your place in Clearing?

Very important + Important

Top 10 responses in 2021 & year-on-year results

Factors relating to teaching had increased in importance



57%

cited availability of accommodation as important or very important (up 12% from 2020)



How do applicants **feel when they go into Clearing, who do they go to for help, and how best can we communicate with them?**

KEY INSIGHTS

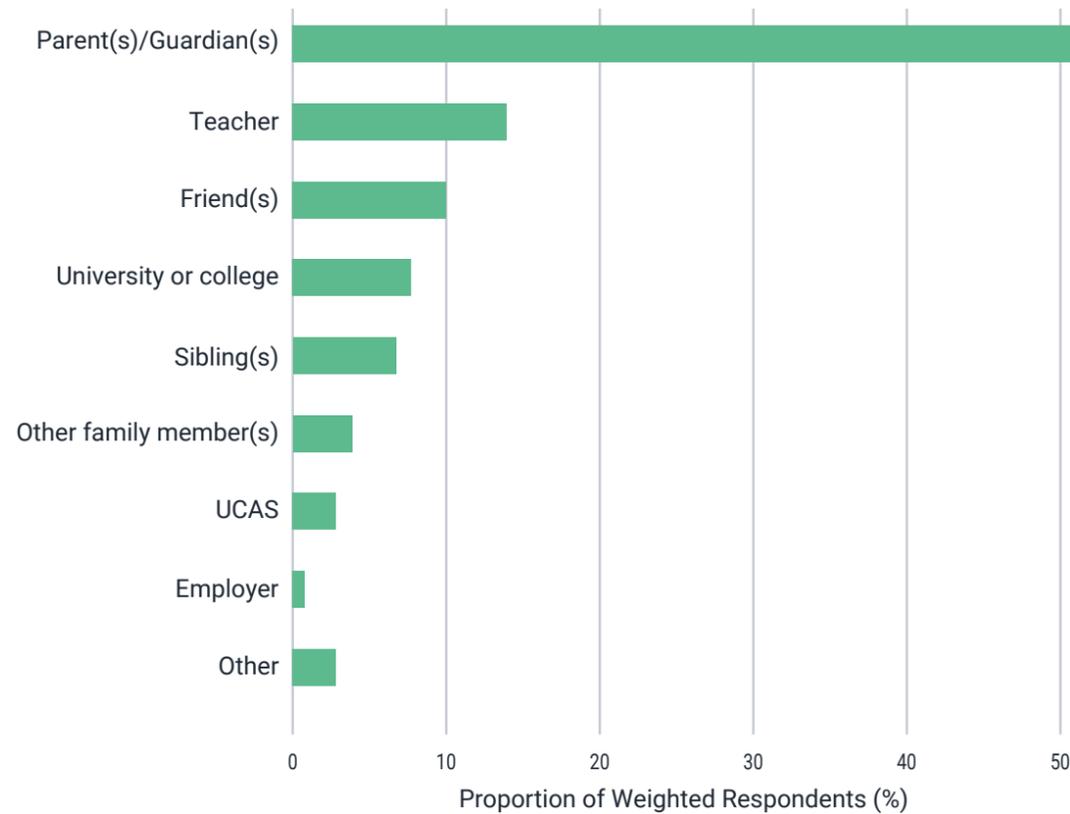


To help applicants get what they need, use the language they need to hear

- ▶ Deciding to go into Clearing, or needing a place in Clearing, had a **huge emotional impact**
- ▶ Even before COVID this was a stressful time, and when needing emotional support **parents tended to be a first place to go**
- ▶ For this COVID cohort, concern about results is likely to have been exacerbated, and they are **checking out Clearing options earlier**
- ▶ Help them trip over **clear and simple information** about the **Clearing process** which will help them secure a place – a firm deadline can be reassuring

When you feel worried you go to those closest to you – for many it was their parents and people they know

- ▶ 'Parent(s)/Guardian(s)' were who over half (51%) of respondents spoke to when they found out they needed to find a place using Clearing, with siblings at 7% and other family members 4%
- ▶ 'Teachers' were next at 14%, 'Friends' 10% and 'University or college' 8%



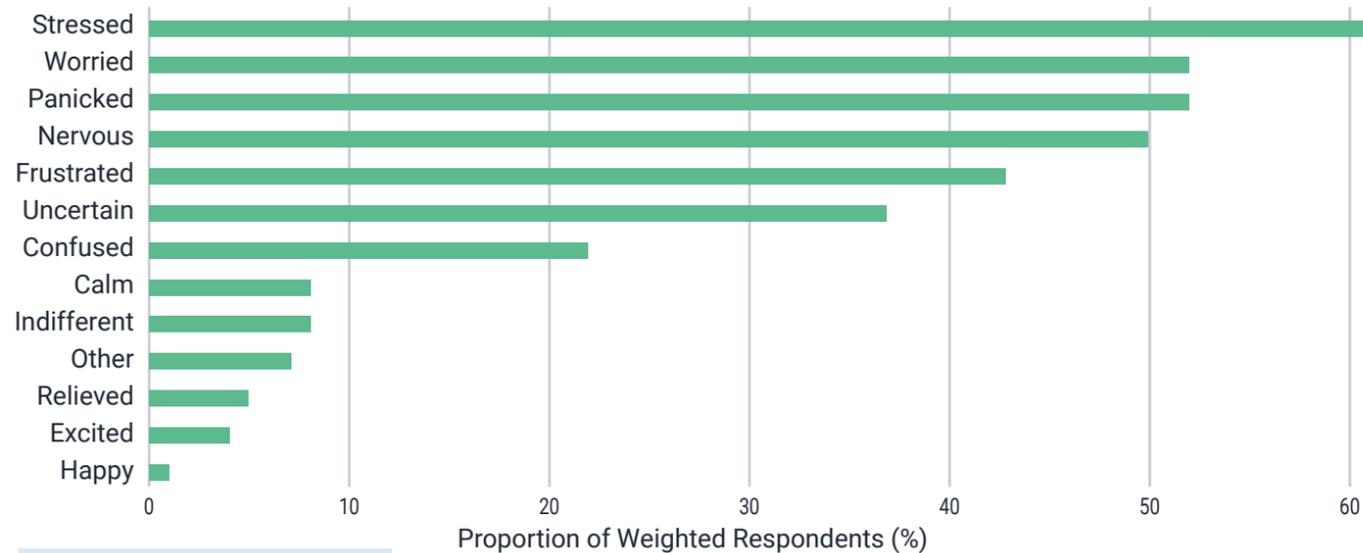
No. respondents: 678
Weighted no. respondents: 10,717

Who did you speak to first after finding out you needed to find a place using Clearing?

Students may have felt teachers to be less accessible in September 2021 than they might have been pre-COVID for face-to-face support.

Needing a place in Clearing had a **significant emotional impact**, so recognising the words applicants use is important

- ▶ At this point they felt stressed, worried, panicked, nervous, frustrated, uncertain, and to a lesser extent confused
- ▶ What they didn't particularly feel was calm, indifferent, relieved, excited, or happy
- ▶ To get their attention so that they you can support and signpost them to the information and opportunities they need, show them you understand and empathise with how they are feeling



No. respondents: 678
Weighted no. respondents: 10,717

Which of the following emotions, if any, do you remember feeling the moment you realised you needed to find a place in Clearing? Please select all that apply.

What they wanted from universities and colleges was a **rock solid process and facts to calm and reassure**

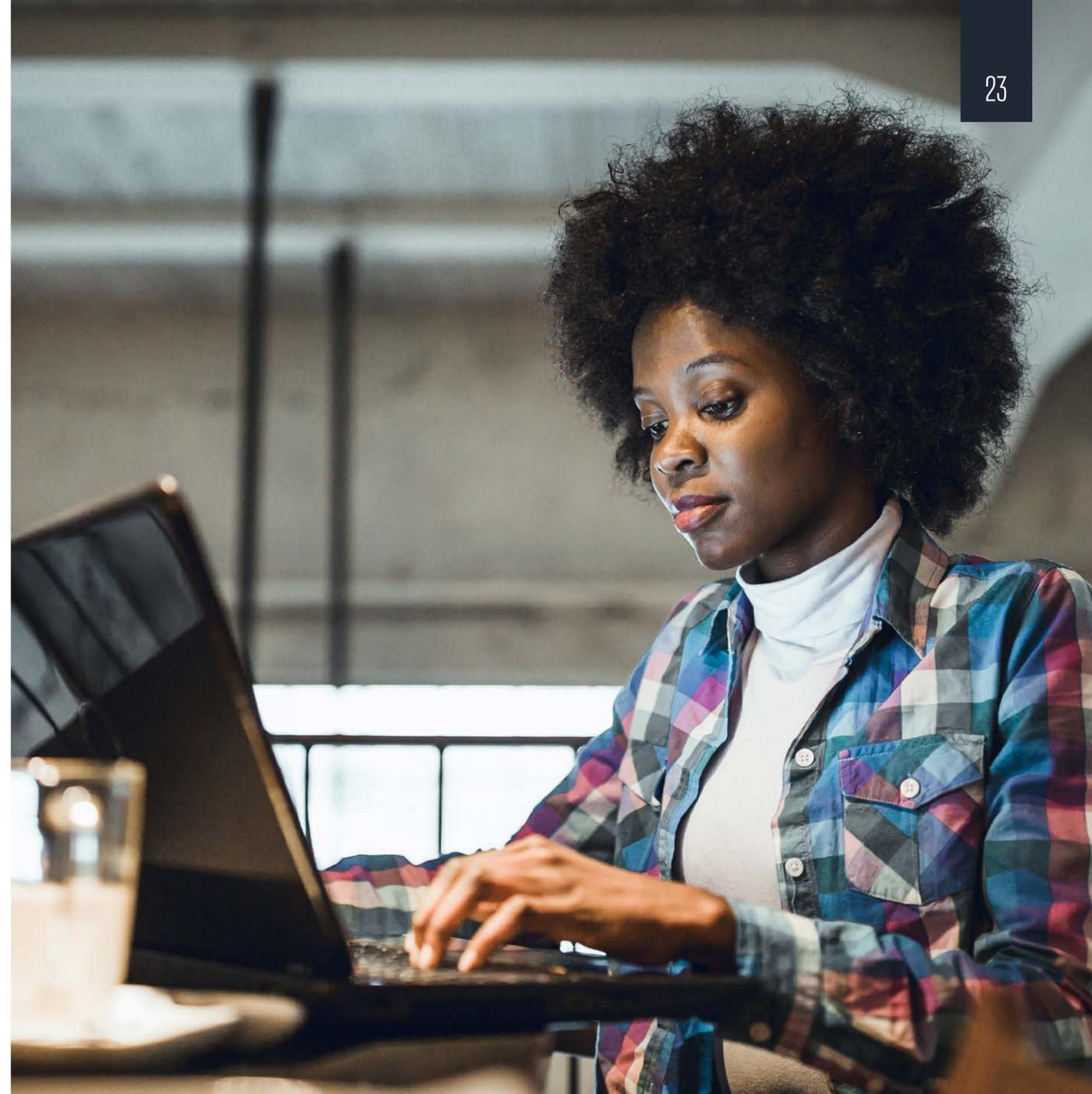
- ▶ When asked how they wanted universities and colleges to **communicate with them** when they were searching for a place in Clearing
 - 63% said they wanted them to 'Talk me through the process **step by step**'
 - 60% said 'Give me the facts'
 - A third wanted universities to 'Reassure me that their university was right for me'
 - And 23% said 'Calm me down'
- ▶ At a time of high stress, it's easy to forget or lose confidence in things that you thought you knew
 - So, communications need to be calm, clear and enabling

Show them that you understand and empathise with how they are feeling



Advertising during Clearing needed to evoke the same feelings

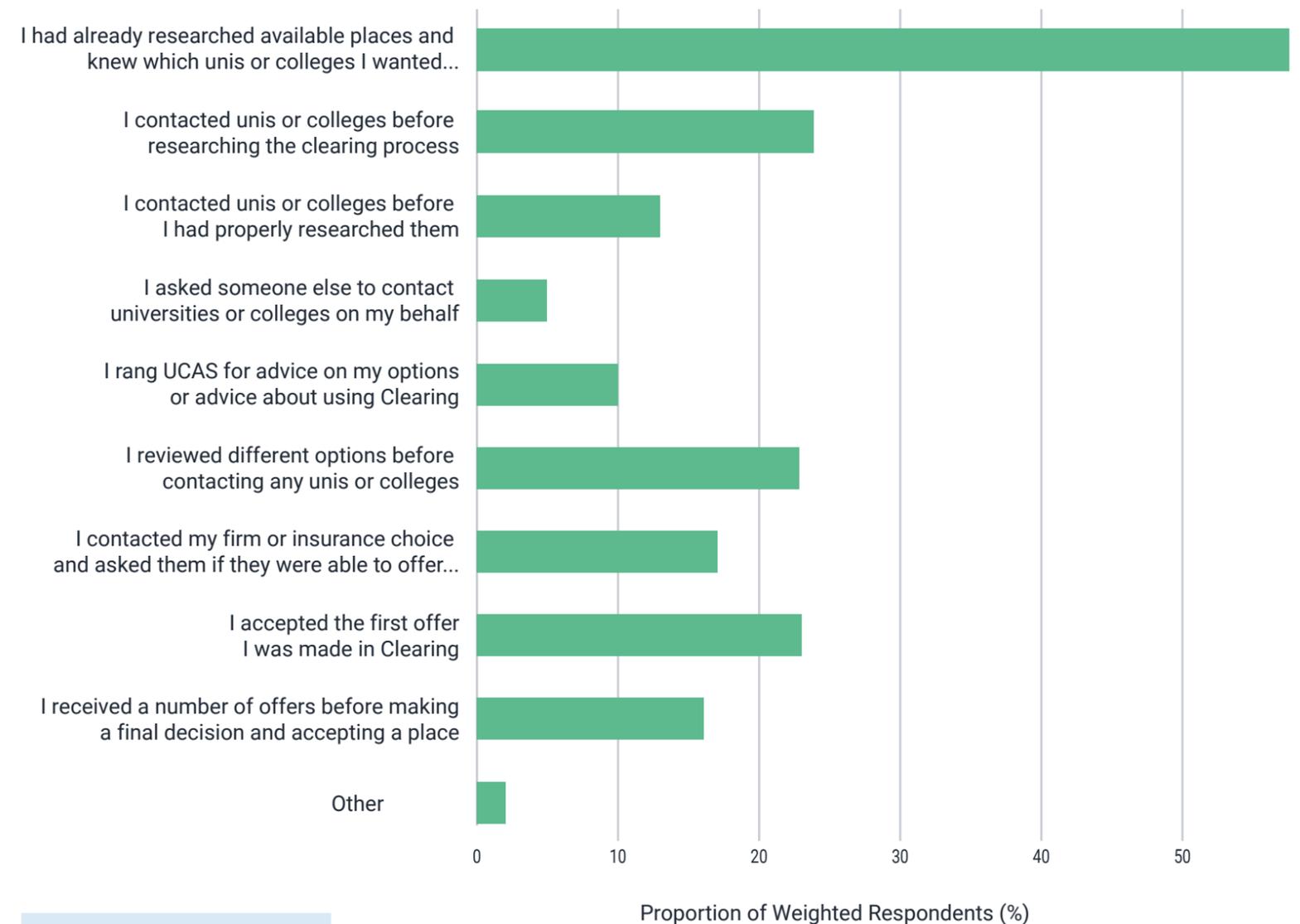
- ▶ When asked what their response was when given some advertising taglines, themes emerged around what made them feel bored or indifferent, inspired or engaged, interested or hopeful
- ▶ The sweet spots seemed to be around
 - Calmness around the process
 - Immediate and measured action
 - Optimistic tone of voice
 - Employability and a future in safe hands
- ▶ The tagline that inspired engagement and interest was reassuring and personal
 - ‘Study at a university in the top 10 for **graduate employment**. Amplify your **purpose**. Apply **now**’
- ▶ Reassuring messages were around the future and process
 - ‘Ready to start your **future**? We’re **with you** every step of the way. Clearing now open. Apply **now**’
 - Change of plans? No problem. Register for Clearing’



And, Clearing doesn't start on results day for prospective students any more than it does for universities or UCAS

- ▶ Many **went straight to universities** in advance
 - 58% of respondents told us 'I **had already researched** available places and knew which unis and colleges I wanted to contact'
 - 24% said 'I contacted unis and colleges before researching the Clearing process'
- ▶ They felt they **had to be quick** to get the courses and unis that they wanted, so some decisions may be made with as much information as they can find in the moment
 - 13% said 'I contacted unis or colleges before I had properly researched them'
 - 23% said, 'I accepted the first offer I was made in Clearing'
- ▶ So neat, clear and focused **communications that are digestible** at this point are essential
 - 23% said 'I reviewed different options before contacting any unis or colleges'

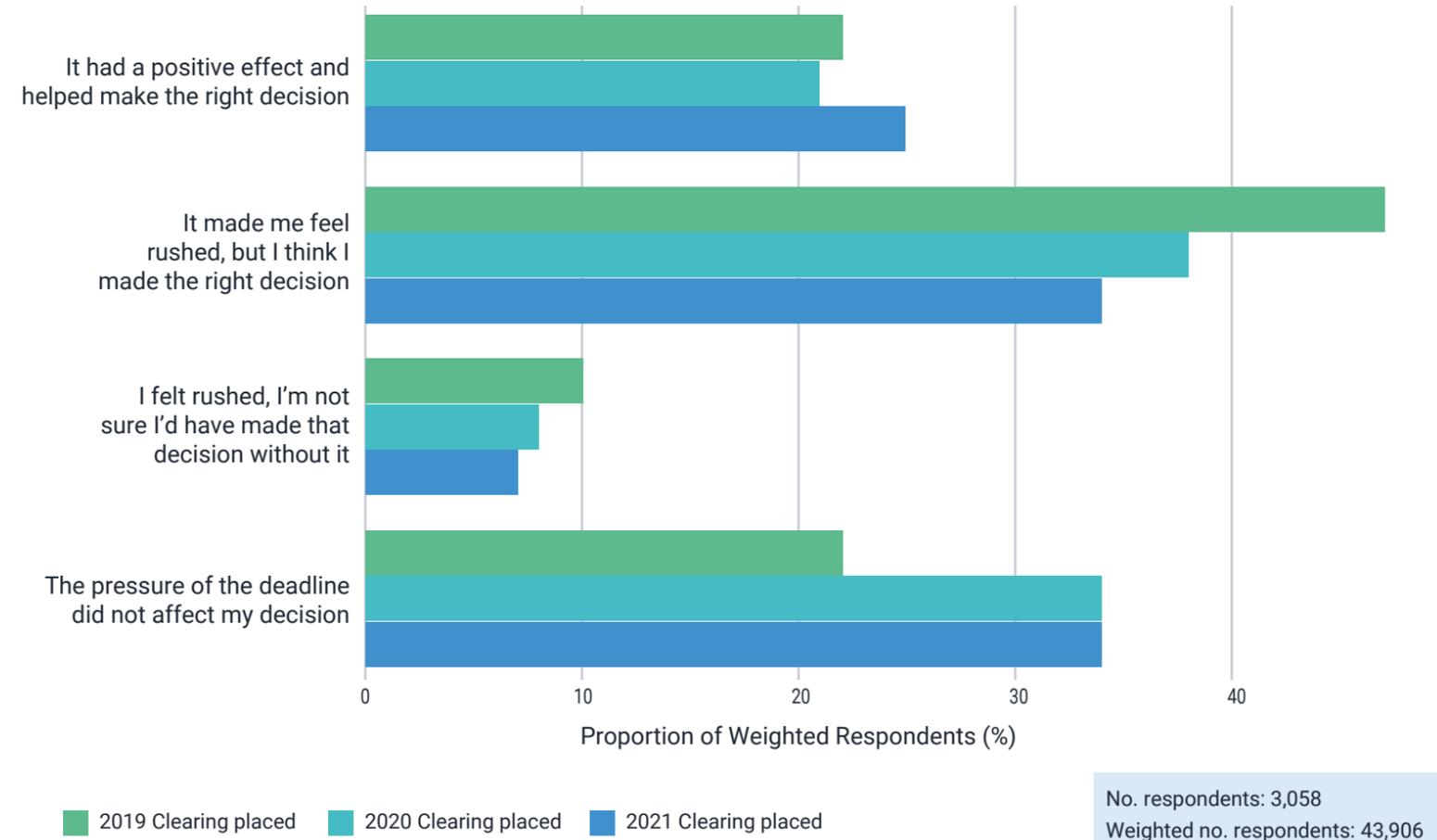
58% of respondents told us 'I had already researched available places and knew which unis and colleges I wanted to contact'



Which of the following statements describe how you used Clearing? Please select all that apply.

There had been an increase in deadlines being set by universities offering Clearing places, and this tended not to be viewed negatively

- ▶ When asked whether a university or college asked them to make a **decision by a certain time**, such as adding them as a Clearing choice or a deadline to decide on an offer
 - Those saying that ‘Yes’ universities and colleges had set a deadline had increased in 2021
 - 2019 40%
 - 2020 46%
 - 2021 54%**
 - **And for those who said yes in 2021**
 - 29%** were given up to 24 hours
 - 29%** up to 48 hours
 - 20%** were given more than 3 days
- ▶ For those given a deadline, it tended **not to be viewed negatively**
 - They were less likely to feel rushed, and they also tended to feel that they had made the right decision



Which of the following do you think best describes how the deadline affected your decision?



There were some interesting changes for those who applied **direct to Clearing, or released themselves into **Clearing****

KEY INSIGHTS



2021 applicants were considering Clearing earlier in the cycle

Applicants were increasingly likely to consider **changing their minds earlier in the cycle** and while waiting for their results

- ▶ With May to July increasing in importance, at the expense of August

Although 2020 and 2021 were not 'typical' years in terms of exams or applications to university

- ▶ These shifts may become embedded, as those going through the education system for many years to come will have been impacted by COVID

So, it's even more important to **keep in touch between May and August** with those holding offers

And **staying top of mind** for those who may be considering or needing Clearing is even more critical

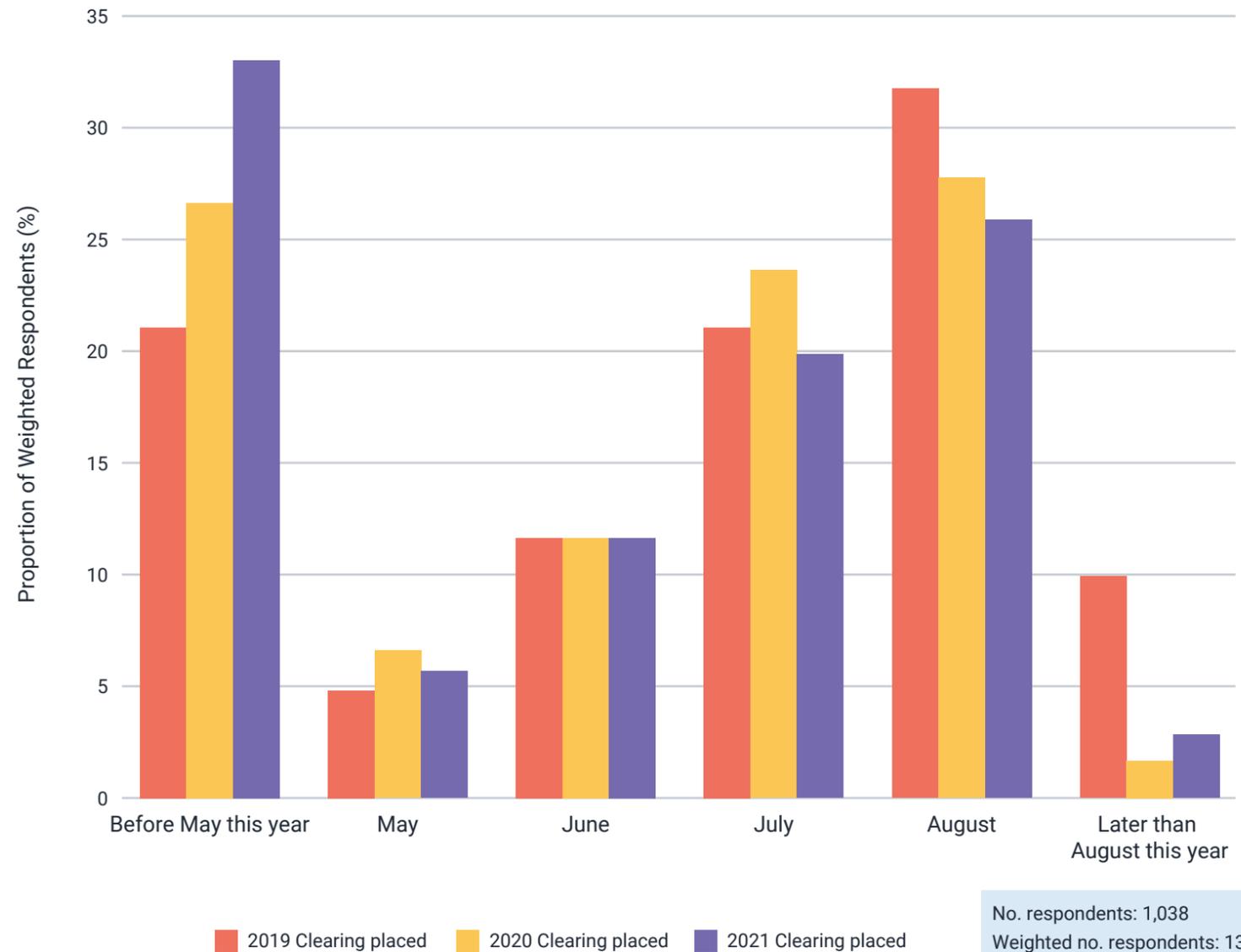
For those who **applied direct to Clearing** in 2021, they were more likely to know that they were going to do it

▶ When asked if they had **always planned to apply directly to Clearing**, respondents in 2021 were more likely to say yes



▶ They were more likely to know they were going to apply to university **before May**, and then applied directly to Clearing

— And less likely to have decided to apply to university in August, than in previous years



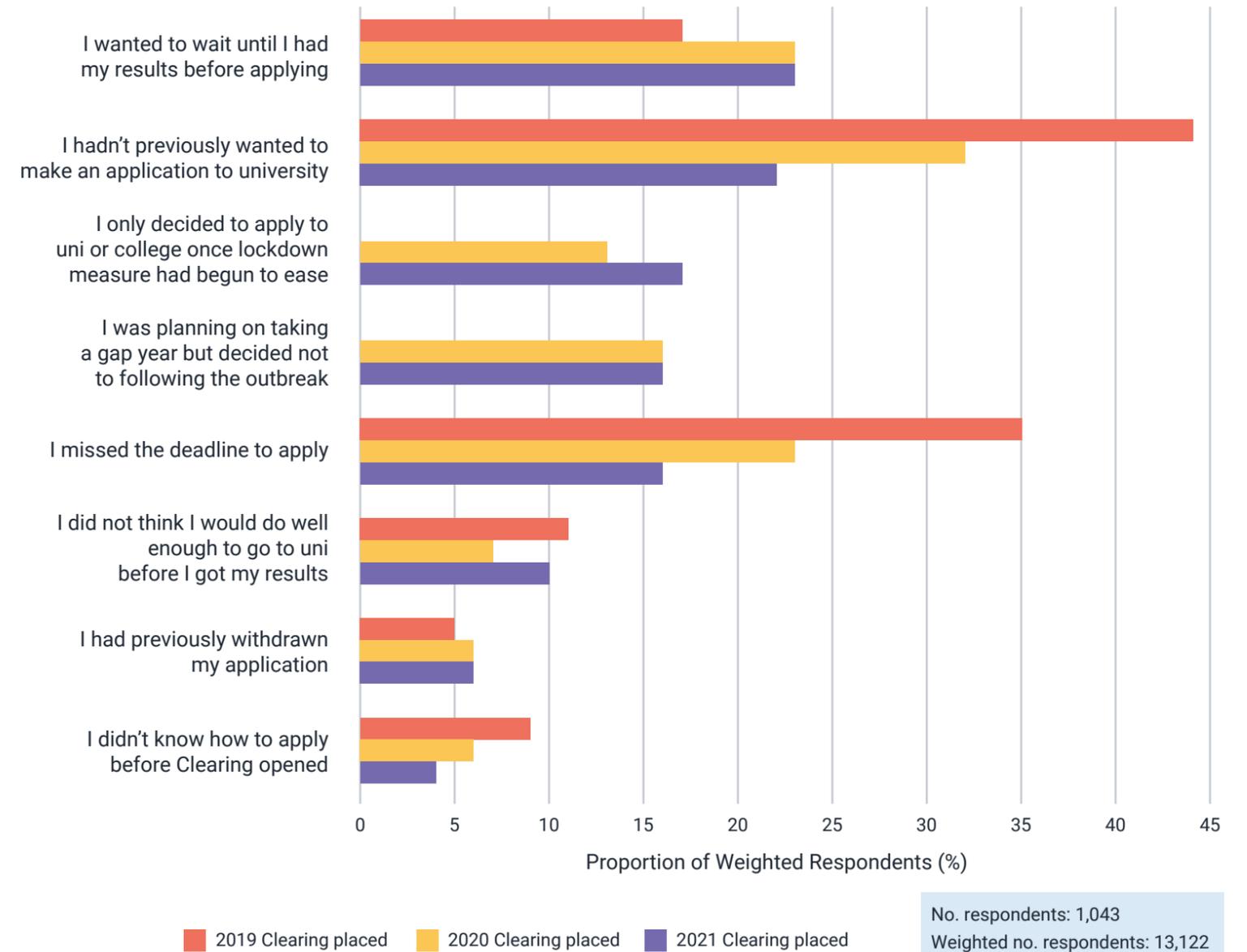
You told us you applied directly to Clearing. When did you decide you wanted to apply to university or college?

Disruption caused by COVID, and concerns around confidence in results, had an impact on the decision to apply later and **direct to Clearing**

- ▶ In 2021 the most cited reason for applying direct to Clearing was 'I wanted to **wait until I had my results** before applying' at 23%, with no change from 2020
 - Interestingly, 'I only decided to apply to uni or college once lockdown measures had begun to ease' increased from 13% in 2020 to 17% in 2021
 - 'I was planning on taking a gap year but decided not to following the outbreak' was 16% in 2020 and 2021
- ▶ This group that applied direct to Clearing **hadn't missed the deadline and knew they were going to apply this way**
 - 'I hadn't previously wanted to make an application to university' had declined significantly in 2021



- 'I missed the deadline to apply' again had declined significantly in 2021



Why did you decide to apply directly to Clearing? Please select all that apply.

For those who released themselves into Clearing they were becoming more likely to have changed their mind before results day

- ▶ The proportion saying 'Yes', they did **change their mind about studying at their original choice before results day** had increased in 2021

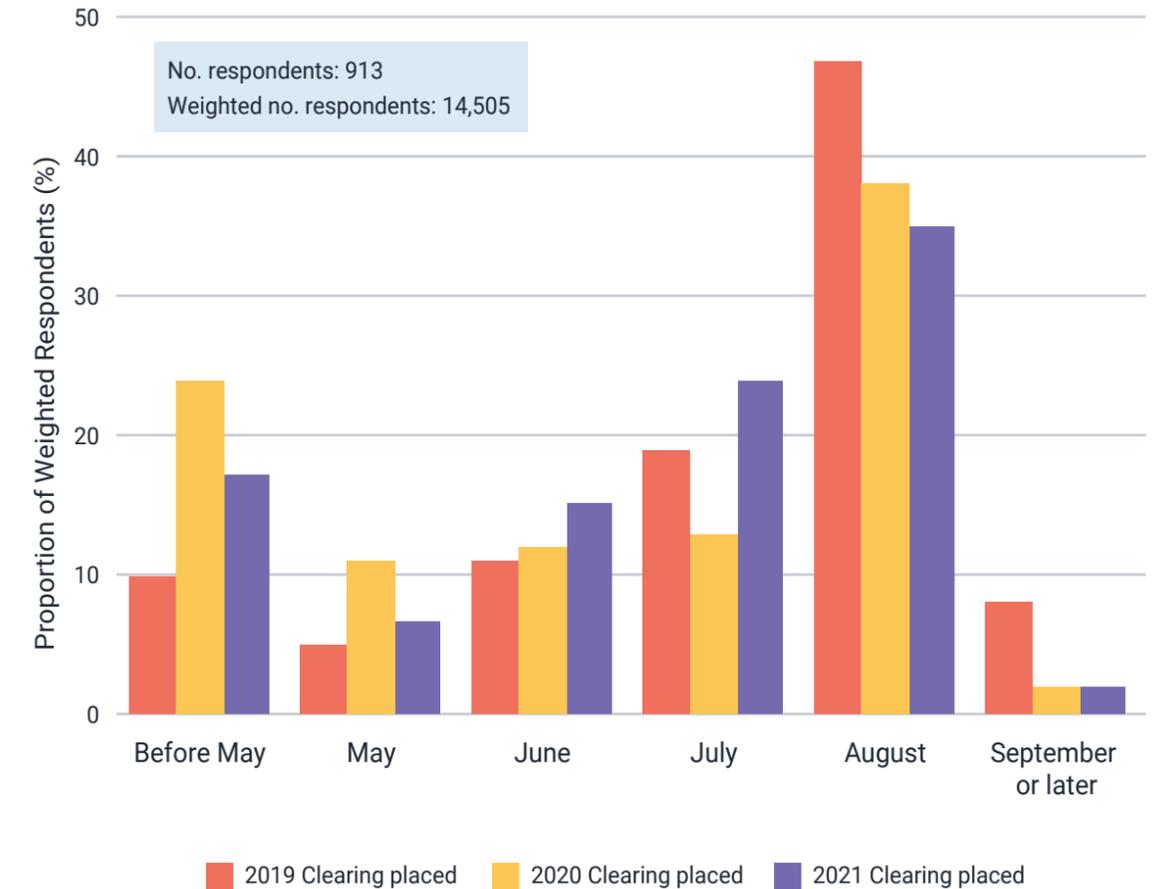
34% 2020  **43%** 2021

- ▶ Although the largest single proportion still **start thinking about applying** somewhere else in August, this has declined over time (47% in 2019 and 35% in 2021) and they had started thinking about it earlier

- Before May from 10% to **17%**
- May from 5% to **7%**
- June from 11% to **15%**
- July from 19% to **24%**

39%

of self-release Clearing applicants started thinking about applying elsewhere before July



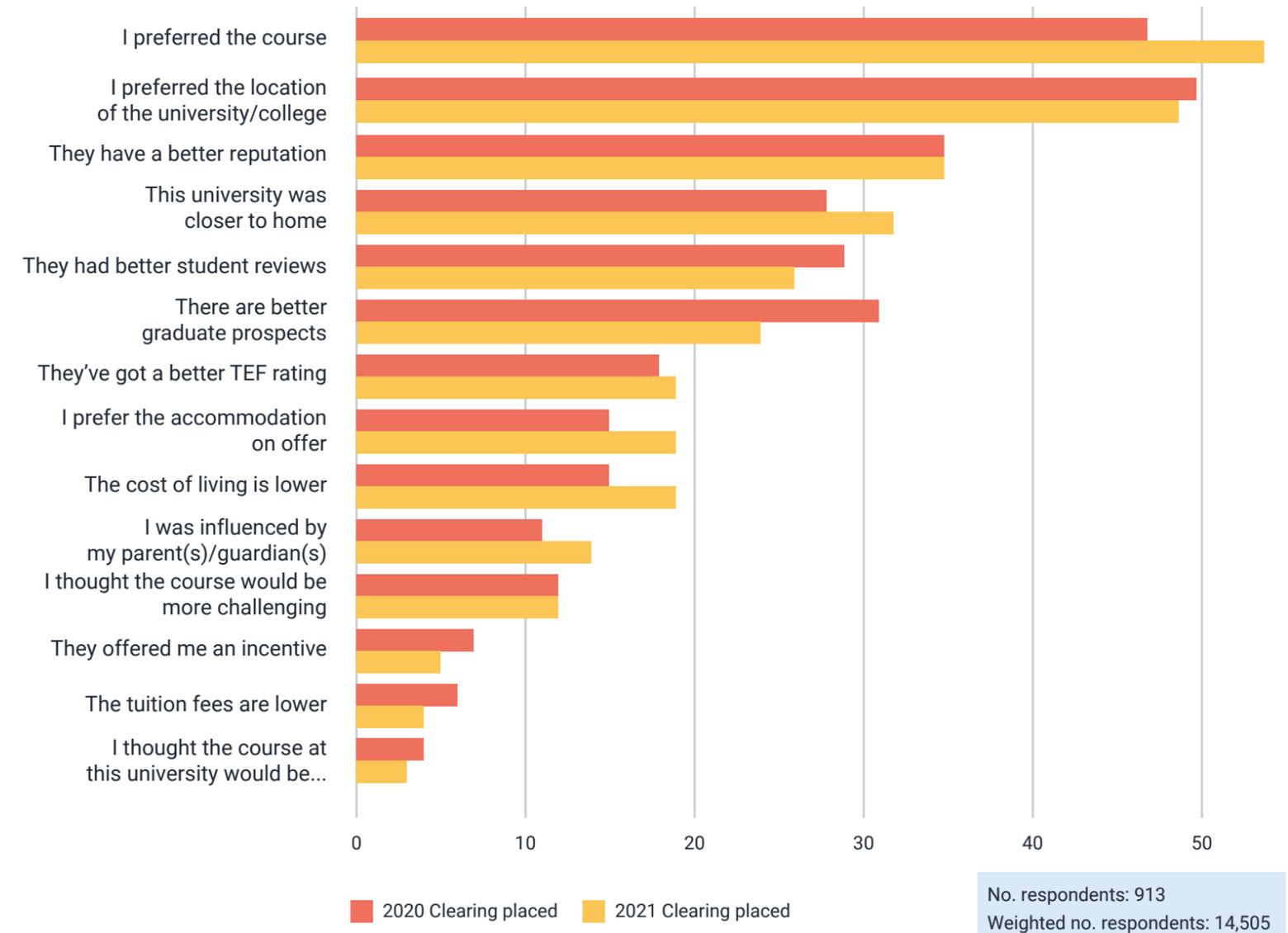
When did you start thinking about applying somewhere else?

The proportion saying 'Yes', they did change their mind about studying at their original choice before results day had increased in 2021

For those who released themselves into Clearing, **location and where they would live** had become more important in choice

- ▶ When asked which factors influenced their decision to **decline their firm choice**, **location was the highest reported factor**, with course second, and a change in personal circumstances third
 - 36% said 'The location of the university or college'
 - 30% said 'Wanting to study a different course'
 - 20% said 'Change in personal circumstances'
- ▶ When asked which factors influenced their decision to **choose the university they went to** instead of the university they were originally placed at
 - The course had increased in importance, from 47% in 2020 to **54%** in 2021
 - For 'I preferred the location of the university/college' there was little change, but this was still around half of respondents
 - But, the following areas **relating to where they lived** increased between 2020 and 2021

'This university was closer to home' 28% to 32%
 'I prefer the accommodation on offer' 15% to 19%
 'The cost of living is lower' 15% to 19%



Which factors influenced your decision to choose the university you are going to, over the university you were originally placed at? Please select all that apply.



**And finally, when we asked
“If you could give one
piece of advice to a student
looking for a place through
Clearing in future, what
would it be?”**

40% said to do plenty of research before results – into courses and universities, accommodation, finances and student societies

“Take the time to look through your options – the balance is different in Clearing, as universities are looking to fill places, so you have more leverage. Don’t jump on the first offer you get”

“Find a university that does the course you’re interested in and research it till you can’t anymore. Try and obtain as much information as possible”

“Research! Look at the university’s website, social media pages, prospectus. Find out as much as you can about them – don’t be tempted to accept an offer without researching that it’s right for YOU”

24% promoted strong self belief and trusting in instincts, and optimism

“Know that there will be something that suits your needs and your personal situation”

“Any opportunity is better than nothing – it could turn out to be the best decision of your life”

“Don’t give up on your dreams just because you don’t get your first choice uni”

Often comments combined emotive advice and self belief

“Be hopeful and be patient. There is a university out there that has a course that you’ll enjoy and if not this year, there’s nothing wrong with a gap year for the time being”

“Do not stress, there is a place for you somewhere. You will be where you are meant to be”

“Don’t be worried if you don’t receive a place, there’s always an alternative route”

19% said to trust and be confident in UCAS and universities, because Clearing works so ‘trust the process’

“Finding a place through Clearing is easy and you will find a course you want to do”

“Don’t be afraid or put off by it, the process is easy to complete”

“It is definitely not as complicated as you think it may be”

Although Clearing can be a worrying time, they were so encouraging and 157 comments said ‘Just do it!’

“Go for it! Amazing service don’t waste time!”

Conclusions ▶ & recommendations

What's new, what it means and what we can do

What's new in 2021

COVID meant that they were often less sure of the future – such as what their grades might be – so backup planning was starting earlier

What that means

When you're feeling unsure, a strong relationship is essential and trust is built from showing them that you understand their worries and needs

What universities and UCAS could do to help

Building and maintaining relationships is even more critical now, from first interest to beyond enrolment. Every student who considers an institution is a potential Clearing enrolment

ACTION

Evolve existing segmentation and personas with the understanding of what the cohorts impacted by COVID need



What's new in 2021

For those who applied direct to Clearing in 2021, many knew they were going to do it, and some will be outside the direct customer relationship management plans

What that means

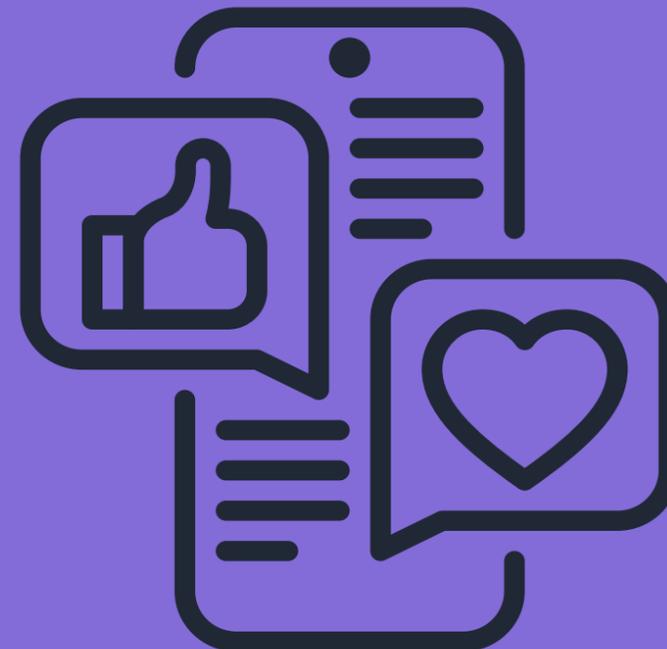
Direct-to-Clearing applicants in 2021 were happier to wait to apply than previous cohorts. For those who have enquired and attended open days, they will only be in some of the system

What universities and UCAS could do to help

Explore who they are, and what would encourage them to apply earlier. For those who aren't in the system at all, they are in the general ecosystem, so engage them via social media

ACTION

Explore what would inspire current direct-to-Clearing applicants to enter the application process earlier – in particular appeal to them via social media



What's new in 2021

They weren't searching for places on social media, but they noticed advertising on social media. They noticed it when it was about what they needed at that moment in time

What that means

Prospective students needed a clear and direct pull from advertising which recognised their needs and concerns and the language they used

What universities and UCAS could do to help

Advertising therefore needs to push to the factual information, but include emotional cues that they need and value – e.g. act now, it will be ok, it's an easy process, and there is an employable future

ACTION

Use emotive and needs-orientated language to get their attention rather than gimmicks or catchy straplines



What's new in 2021

Whether they knew something about the university they chose during Clearing or not, they are much more time pressured and the information they need may also be prioritised differently due to COVID

What that means

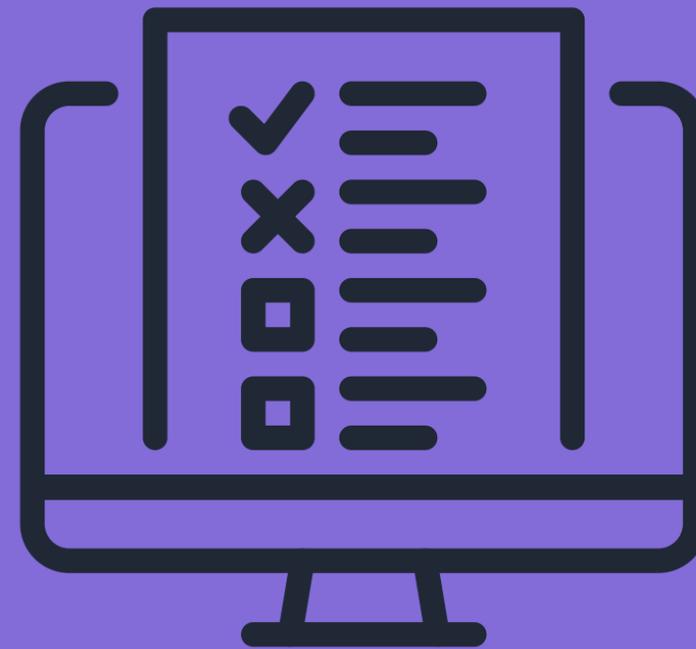
Whether they chose to apply late or not, it can feel like there are lots of 'ifs' associated with navigating the steps in the Clearing process, and they just want to know the facts

What universities and UCAS could do to help

They need easily digestible and pre-digested information, yes or no answers, and deadlines

ACTION

Provide pre-digested information which is factual and relates to clear points in the process, including deadlines



What's new in 2021

Direct contact, calling universities directly, and going to trusted sources like university, college and UCAS websites were critical. Over half went straight to parents for support as a first stop

What that means

COVID means that many will have had a more disjointed and disengaged decision-making path, so direct reassurance is even more important at a crunch point like Clearing

What universities and UCAS could do to help

Make sure call handling staff and online sources are 100% clear on process, key dates, and support. And get this in front of parents via targeted advertising

ACTION

Clearing is always high pressure so provide targeted practical and emotional reassurance



What's new in 2021

There were some clear changes (for some) around wanting to study closer to home. Often reasons were because of concerns about needing support, or being able to provide support easily

What that means

For some, location concerns led to a late application or change in decision due to worries about COVID. Again for some, a late decision can mean a completely new choice of university, and possible compromises on course choice

What universities and UCAS could do to help

They need to be up to speed very quickly about a course, institution, and city – as well as practical things like accommodation, travel, and parking

ACTION

Understand the emotional drivers when choosing to be closer to (but not at) home, and the impact on the day-to-day student experience



What's new in 2021

The cohort going to university from 2020 onwards have had disrupted and disjointed teaching at school due to COVID

What that means

They want to know what they will be learning and reassured about how they will be taught, including flexibility around module choice

What universities and UCAS could do to help

Explore what they would find valuable, reassuring, inspiring and trustworthy in terms of information about how they will be taught

ACTION

Acknowledge COVID where possible, and show them what teaching and learning will look and feel like



What's new in 2021

They have real concerns around where they will live and assume university accommodation will be gone by the time they get to Clearing

What that means

They may be coming to terms with a city or area (for some, close to home but not at home) that they know little about and might not have visited due to COVID. Knowing where they'll live and what it will look and feel like is essential

What universities and UCAS could do to help

This is critical to the Clearing process for them, and likely to have a real and positive impact on engagement – so make information clear, reassuring, and tangible

ACTION

Meet accommodation information and reassurance needs – COVID plus Clearing creates more worries





Want to reach more students in Clearing?

Learn more about the products and services we've designed to help you put your institution in front of students – both leading up to Clearing and during Clearing itself.

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