National Clearing Survey

2015

Annual Report

University of Manchester

2015

Net Natives

About the National Clearing Survey

Net Natives launched the National Clearing Survey to better understand the Clearing process and journey from the point of view of the students. The National Clearing Survey exists to enable institutions to gauge a more detailed understanding of student actions prior to and post Results Day, their main influences and their motivators when choosing a Clearing place.

By understanding these factors, and the effects they have on students, institutions can optimise their strategies for 2016 and ensure they are targeting them on the right device, at the right time, and using the optimum platform. This ultimately makes the process of Clearing easier and more efficient for students, whilst increasing student enrolments for the institutions themselves.

Contents

Introduction

As of the 28th August 2015, 50,390 students secured a place at University through Clearing; this equates to 10.3% of the total number of students going to University (491,310). This figure is 6% larger than the same period in 2014.

In total, 61,200 students went through Clearing to get into University in 2014. This year 64,300 students went through Clearing - an additional 3,100 compared to last year.

The National Clearing Survey 2015 had 1,555 responses from students who applied to University through Clearing in 2015 and went on to study at 47 different universities, making this a representative sample of the Clearing student audience. The fourteen universities that took part included both Russell Group and 1992 universities. 95 responses to the survey were from students going to The University of Manchester.

For more information on respondents please refer to the Demographic, Age and Geographic Breakdown sections of this report.

Thank you for taking part, the National Clearing Survey 2015
could not have happened without you.

Methodology

The National Clearing Survey 2015 was open to all students who had gone through the Clearing process for the academic year 2015/2016.

The National Clearing Survey was available to any University which offered Clearing places. Fourteen universities chose to take part and they distributed the survey to all Clearing students that applied for a place at their institution. All institutions that took part received a branded survey to distribute and have received their own institution report compiled by the Insights division at Net Natives.

The survey ran from 27th August 2015 to 22nd October 2015.

Overview of Respondent Demographics and Geographics

The graph below shows the ages of the National Clearing Survey 2015 respondents compared with UCAS' average ages for all University applicants (UCAS 2011 – 2015). Almost 50% of responses from the National Clearing Survey were from 18 year olds; the next most popular age was 19 year olds, with 28%.

The University of Manchester had a higher than average proportion of students aged both 18 and 19 years and lower than average for students aged 20 or over.

Breakdown of Age
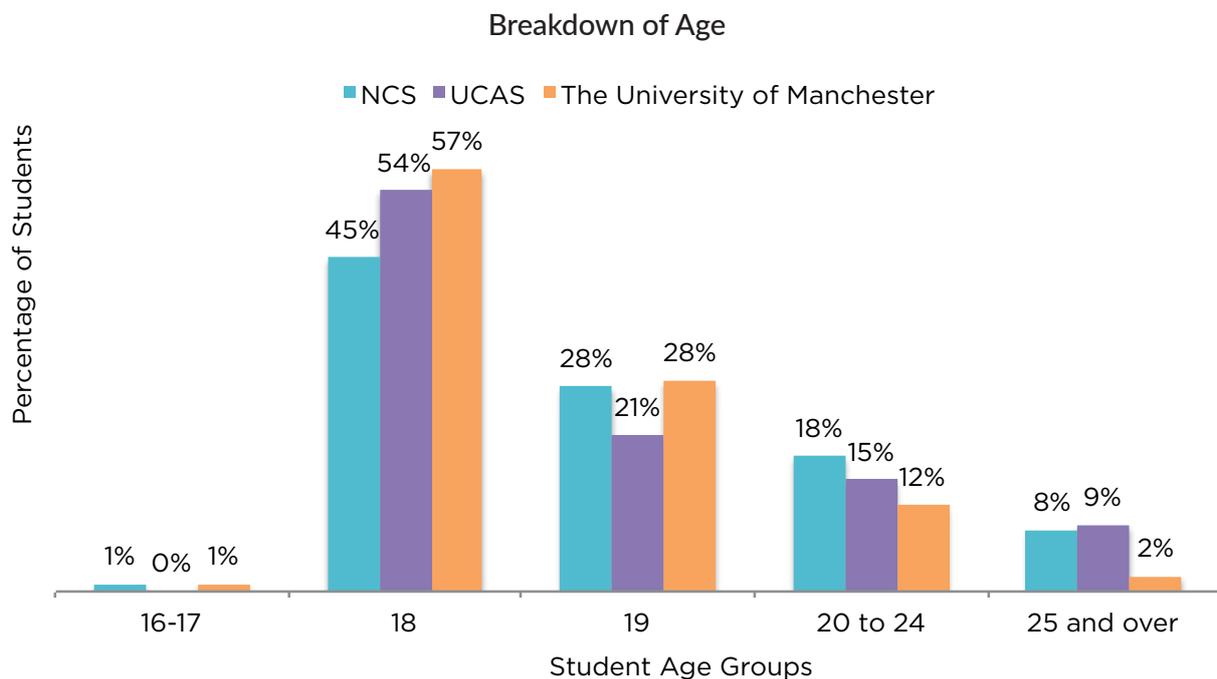
■ NCS ■ UCAS ■ The University of Manchester

Figure 1. Breakdown of NCS, UCAS and Manchester's respondents age brackets

Just over half of the students that responded were female, 41% were male and 1% chose not to declare. This is representative of the male to female ratio of University students; according to UCAS, over the last 5 years, on average 56% of applicants are female and 44% male.

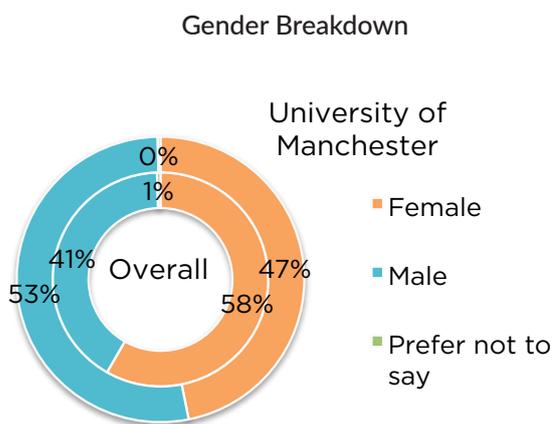The University of Manchester had a much higher proportion of males to females than the average.

Gender Breakdown

University of Manchester

- Female
- Male
- Prefer not to say

Figure 2. Breakdown of NCS respondent gender. Outside ring – University of Manchester, inside ring - overall

Students from across the country took part in the National Clearing Survey 2015, below is a map displaying their locations.

The dots in blue represent all students who responded, those in orange are the students who applied to your University.
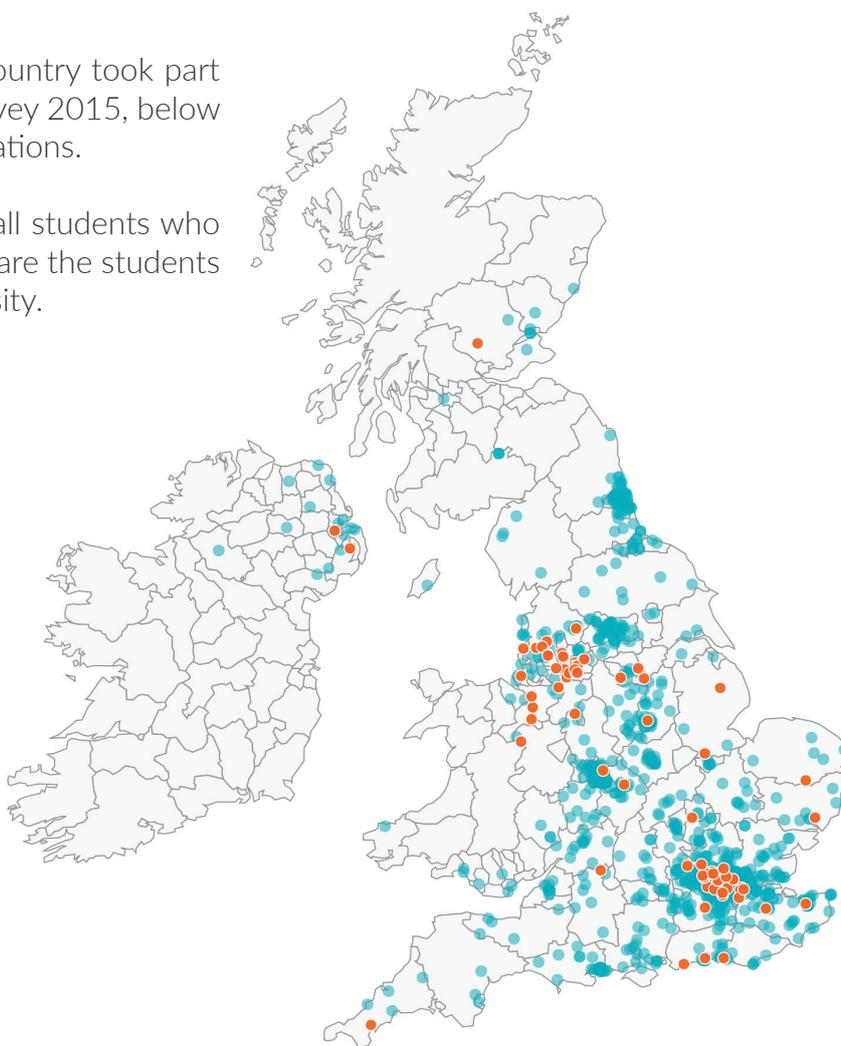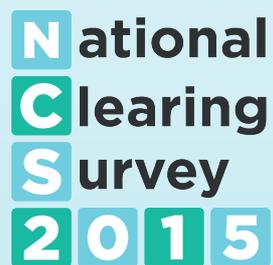

Figure 3. Breakdown of NCS respondent home location

Section 1

Motivations

Reasons Students Went
Through Clearing

National Clearing Survey 2015

Motivations - Key Findings

1 53% of students chose to go through Clearing for reasons other than not acheiving a place at their first or second choice of University.

2 Career prospects and course subject were the most important factors when it came to choosing a Clearing University. University location and reputation along with course reputation were also significant concerns.

3 Personal research was the most important factor when choosing a Clearing place over any other factor, including the influence of family and friends.

It is widely accepted that the main reason for students going into Clearing is due to students not achieving their predicted grades and subsequently not being accepted into either their firm or insurance choice.

As expected, a large proportion of 47% of students responded that they went through Clearing because they did not get into either their first or second choice.

However, this left a remainder of 53% of students who chose to go into Clearing for other reasons, as shown in the graph below:

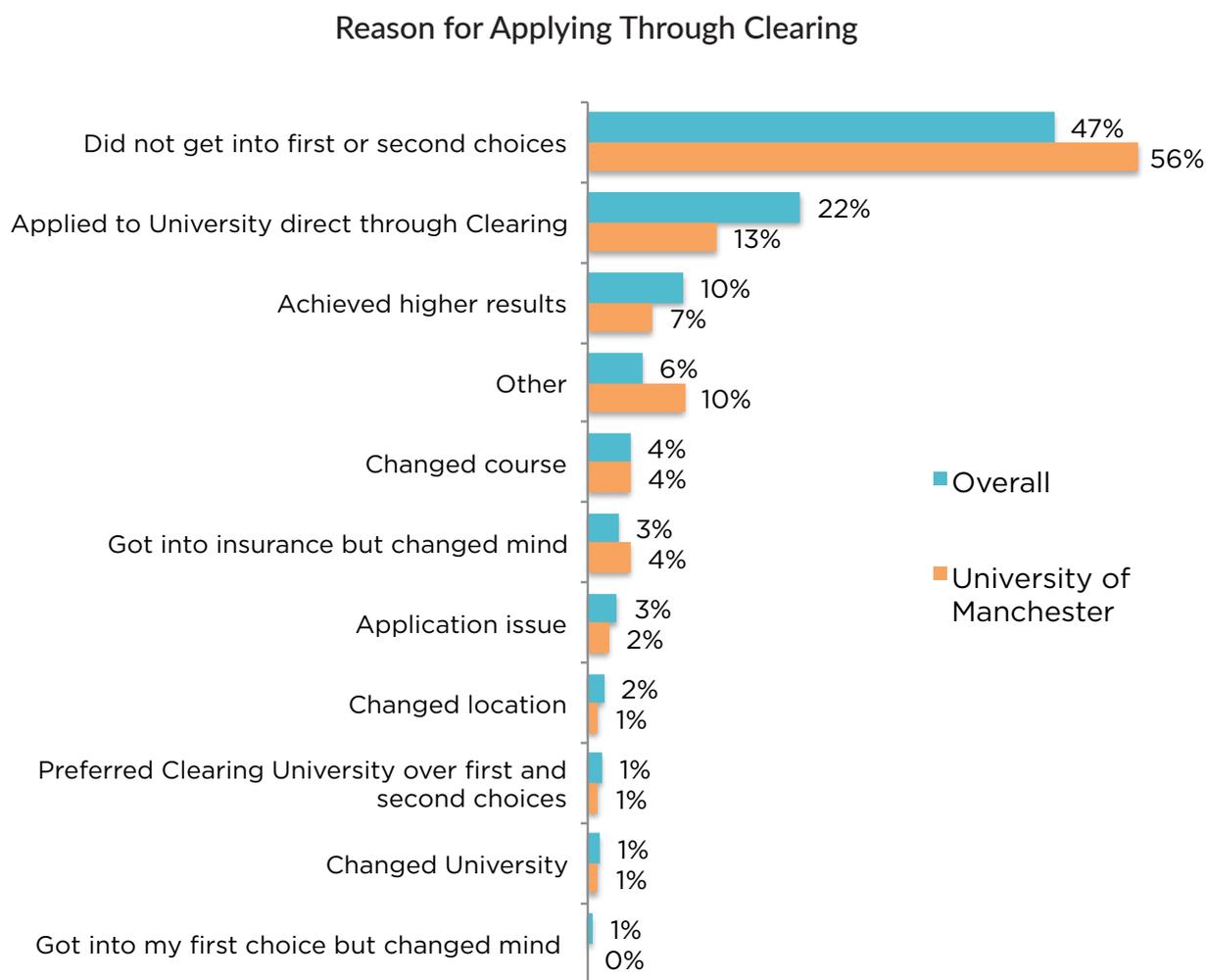## Reason for Applying Through Clearing

Figure 4. Reasons why students went through Clearing

The University of Manchester saw a higher percentage of students going to their University through Clearing due to them not getting into their first or second choice with a majority of 56%.

To understand the factors which influenced or motivated applicants to pick a particular. Clearing course/institution, students were asked to rate factors out of ten in terms of importance.

The graphs below show the average importance rating of certain factors when deciding on a final Clearing choice.

The most important factor was the career prospects that the course had to offer, this was closely followed by the subject choice. The students going to Manchester responded that the most important factor to them was the course subject. University reputation was also revealed to be a dominant factor is choosing the University on Manchester.

Institutional Factors

■ Overall ■ University of Manchester

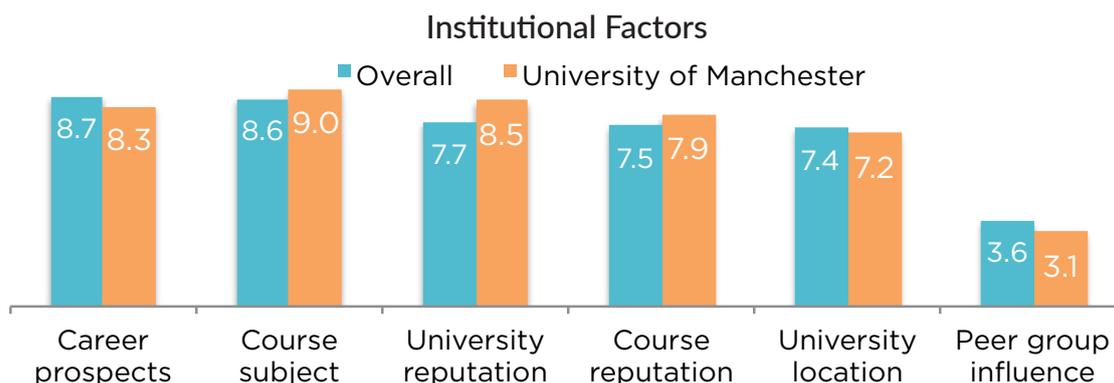| Factor	Overall	University of Manchester
Career prospects	8.7	8.3
Course subject	8.6	9.0
University reputation	7.7	8.5
Course reputation	7.5	7.9
University location	7.4	7.2
Peer group influence	3.6	3.1

Figure 5. Institutional factors which influenced students' Clearing decision

The students also rated how much the following personal factors influenced their Clearing choice.

Other Influential Factors

■ Overall ■ University of Manchester

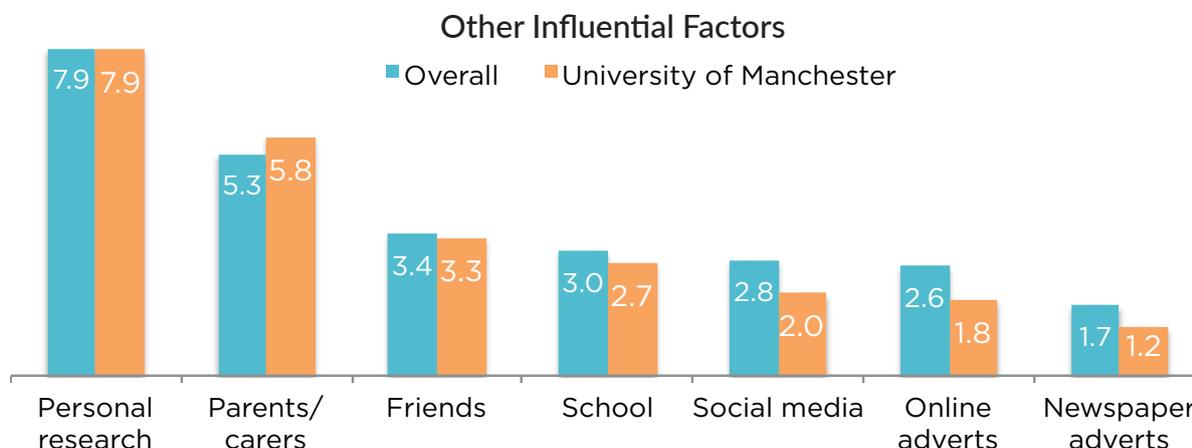| Factor	Overall	University of Manchester
Personal research	7.9	7.9
Parents/carers	5.3	5.8
Friends	3.4	3.3
School	3.0	2.7
Social media	2.8	2.0
Online adverts	2.6	1.8
Newspaper adverts	1.7	1.2

Figure 6. Non-institutional factors which influenced students' Clearing decision

The students considered their own personal research to be the factor that influenced their decision the most. The next two most influential factors were their parents and their friends. The responses from The University of Manchester followed the same trends for this question, with slightly higher importance placed on parents/careers than the average for Manchester. These metrics are easily quantifiable as they are active actions. They responded that social media, online adverts and newspaper adverts did influence their decision but were not as important.

Section 2

Pre-Results Day Activity

Student Activity Prior
to Results Day

National
Clearing
Survey
2015
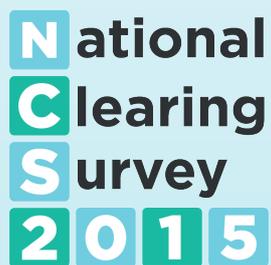
Pre-Results Day Activity - Key Findings

1 — Two thirds of students did not attend an Open Day for the University they ended up attending, although 71% had previously visited the University website.

2 — The level of research on Clearing that students undertook prior to Results Day was very mixed. However, 86% of students did do some research prior to Clearing.

3 — After UCAS, University websites were the most popular source of research information.

4 — Specific course information followed by institutional information were the most important areas for students researching Clearing prior to Results Day.

To understand the Clearing journey, it is important to recognise the activity that happens prior to the student receiving their A-Level results.

This section explores the following; students overall awareness of their Clearing University, how much research they carried out about Clearing prior to obtaining their results, where they researched and what they looked for.

Students were asked about their awareness of their Clearing University prior to Results Day. 67% of students had not visited their University in person before they chose to study there, while 71% of respondents had previously visited their website.
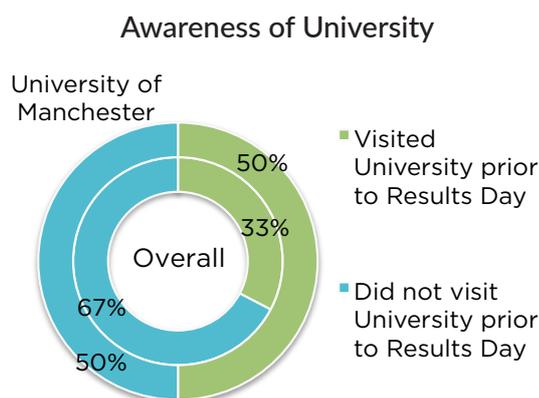
Awareness of University

University of Manchester

50%

33%

Overall

67%

50%

- Visited University prior to Results Day

- Did not visit University prior to Results Day

Figure 7. Breakdown of students who had visited their Clearing University in person. Outside ring – University of Manchester, inside ring - Overall

Awareness of University Website

University of Manchester

15%

29%

Overall

71%

85%

- Visited University website prior to Results Day
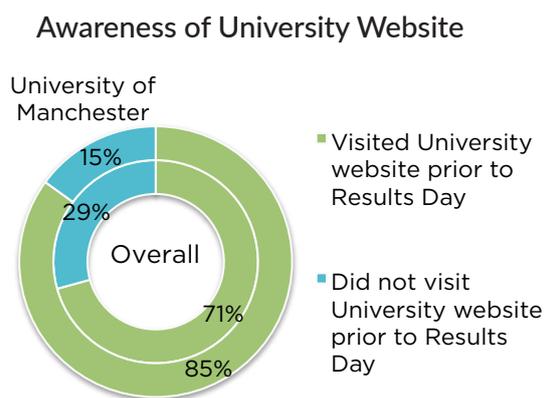
- Did not visit University website prior to Results Day

Figure 8. Breakdown of students who had visited their Clearing University's website. Outside ring –University of Manchester, inside ring - Overall

Students going to The University of Manchester showed a greater level of awareness of their Clearing University prior to Results Day. 17% more students had visited the University and 14% more had visited the website.

The amount of Clearing research conducted by the students prior to Results Day was very varied. We asked the students to rate the amount of research they had done from 0 to 10, with 10 being a significant amount. 40% of students responded that they did very little research, rating the amount as three or less. However, on average students going to the University of Manchester did less research than average prior to Results Day.

Amount of Research Conducted About Clearing Prior to A-Level Results Day

■ Overall   ■ University of Manchester

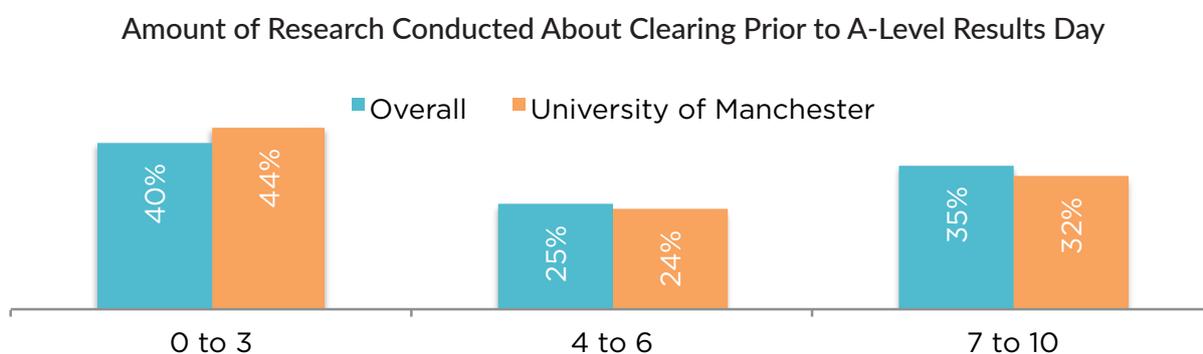|	0 to 3	4 to 6	7 to 10
Overall	40%	25%	35%
University of Manchester	44%	24%	32%

Figure 9. Amount of Clearing research conducted by students prior to Results Day

The most popular sources of Clearing research prior to Results Day were the UCAS service and University websites.

Where Students Researched Clearing Prior to Results Day

■ Overall   ■ University of Manchester

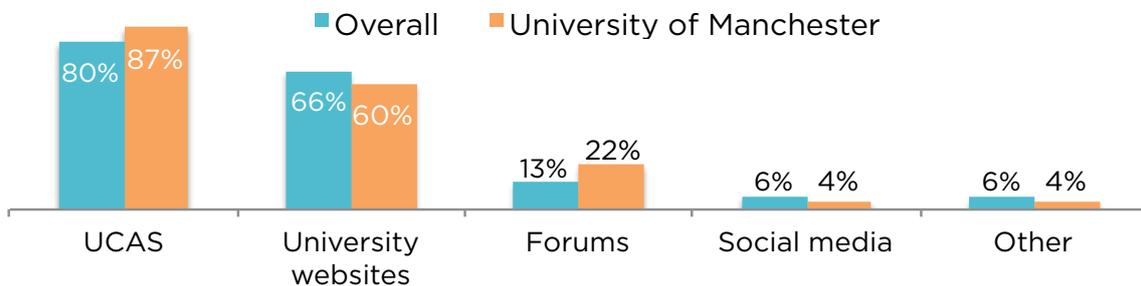|	UCAS	University websites	Forums	Social media	Other
Overall	80%	66%	13%	6%	6%
University of Manchester	87%	60%	22%	4%	4%

Figure 10. Breakdown of sources used for Clearing research

A higher percentage of students going to The University of Manchester used the UCAS service and forums than the average.

Where students researched Clearing prior to Results Day, they mostly looked for information on which courses and universities would be offering Clearing. However, almost a third of students were also looking for information on the application process.

What Information Students Looked for Prior to Results Day - Overall

■ Course information
■ Institution information
■ Application process
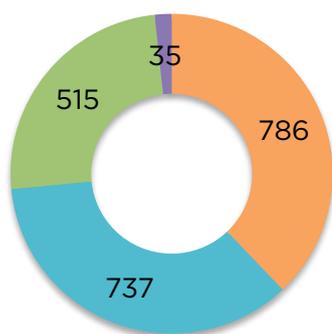■ Other

35
515
786
737

Figure 11. Overall NCS respondents - breakdown of information looked for prior to Results Day

What Information Students Looked for Prior to Results Day - University of Manchester

■ Course information
■ Institution information
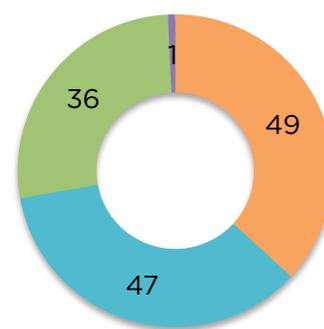■ Application process
■ Other

1
36
49
47

Figure 12. Breakdown of information looked for prior to Results Day for University of Manchester

Information looked for prior to Results for students going to the University of Manchester was very much aligned with the overall average.

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Section 3

Results Day and Post-Results Day Activity

Student Activity During and After Results Day

National Clearing Survey 2015
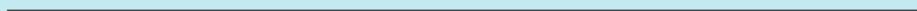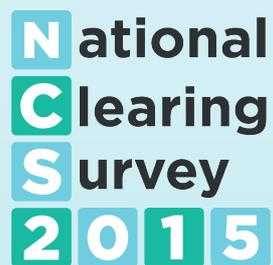
Results Day and Post-Results Day Activity - Key Findings

1   83% of students surveyed had searched for Clearing opportunities within six hours of receiving results.

2   52% of students surveyed started research for Clearing opportunities within the first hour of receiving their results. This means that by 9am, over half of students had begun their search.

3   Google is the most popular search engine with 96% of students using it for their Clearing searches. Yahoo and Bing each saw only 1.2% of Clearing applicants' searches.

4   Although UCAS is the most popular source for research prior to Results Day, on Results Day itself University websites were the most widely used channel for Clearing research.

5   61% of students changed their original University choice, but only 37% of students changed their original course choice.

6   Students predominantly searched for specific courses and specific universities on Results Day.

7   46% of students used more than one device when finding a Clearing place with 17% of students only using a mobile.

This section focuses on the processes students went through once they had received their results, providing insight into the channels and devices they used, how they searched and their timings.

Students were asked how long it took them to start searching for Clearing places once they had received their results.

A majority of 52% started searching within one hour. Students are able to collect their results around 8am on Results Day; this means that by 9am, over half of students had begun to search.

83% of students started their search by 6pm on Results Day, leaving only 17% who started to search post Results Day.
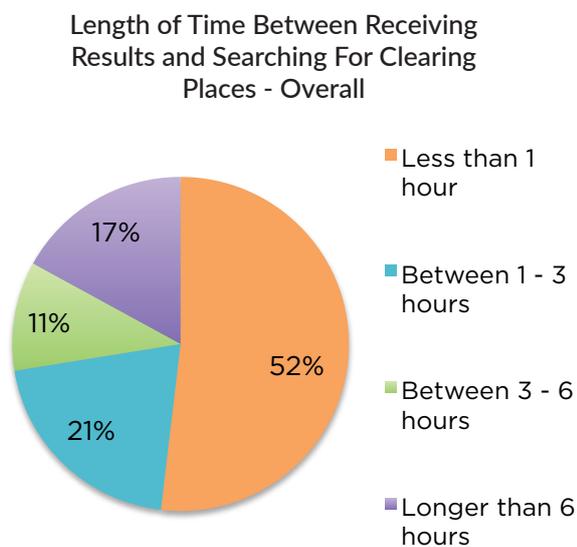
Length of Time Between Receiving Results and Searching For Clearing Places - Overall

- Less than 1 hour
- Between 1 - 3 hours
- Between 3 - 6 hours
- Longer than 6 hours

52%
21%
11%
17%

Figure 13. Overall respondents length of time between receiving results and searching for Clearing places

Length of Time Between Receiving Results and Searching For Clearing Places - University of Manchester

- Less than 1 hour
- Between 1 - 3 hours
- Between 3 - 6 hours
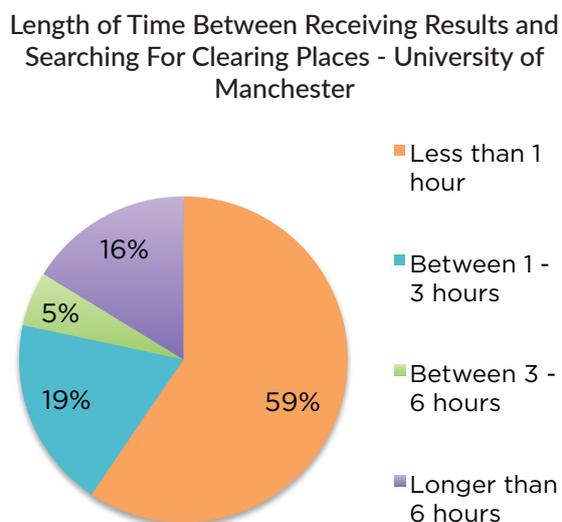- Longer than 6 hours

59%
19%
5%
16%

Figure 14. Length of time between receiving results and searching for Clearing places – University of Manchester

The University of Manchester saw similar trends to the average, with 7% more students searching within the first hour and 1% less waiting longer than 6 hours.

Students were asked which of the following search engines they used when trying to find a Clearing place;

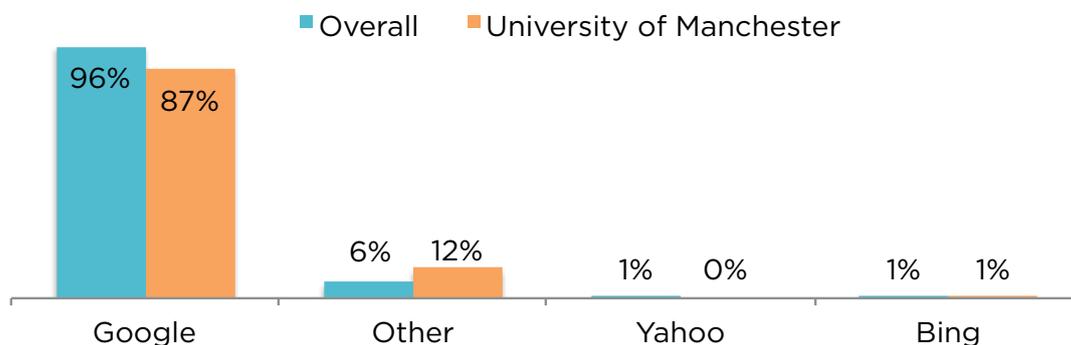## Search Engines Used to Research Clearing places

Figure 15. Breakdown of search engines students used to search for Clearing places

Almost 96% of students responded that they used Google, 1.2% used Yahoo, 1.2% used Bing and 6.1% responded with 'other'. Only 4% of students used more than one search engine when looking for Clearing places.

Students responded that the following channels helped to inform their Clearing decision. The vast majority used the official University websites. Forums, UCAS and newspapers were other popular choices. Students going to University of Manchester used forums, newspapers and social media more than the average.

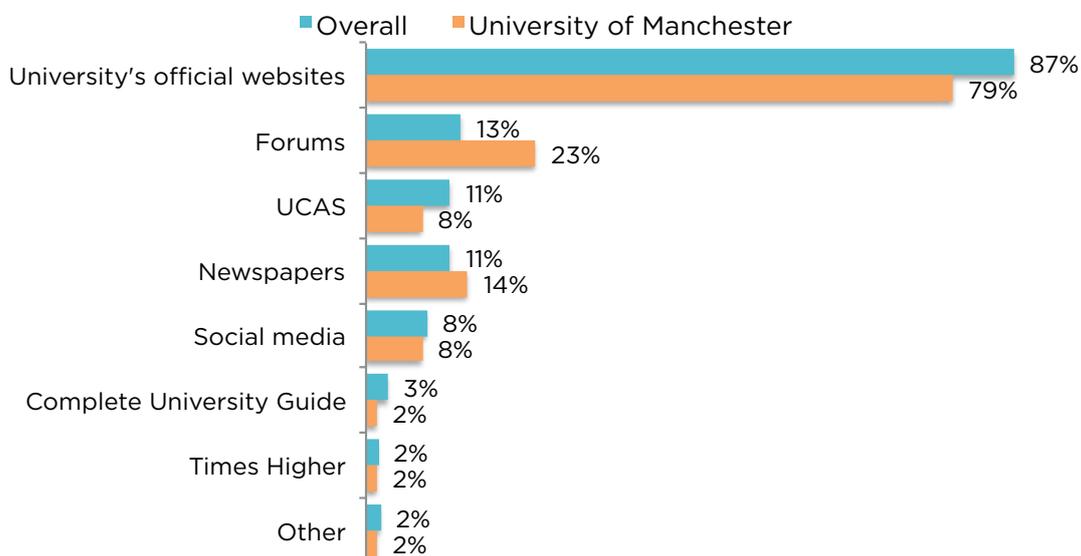## Channels Used to Help Inform Clearing Decision

Figure 16. Breakdown of channels used to inform Clearing choice

Students going to The University of Manchester used forums much more than the average.

Students were asked if they changed their original course choice and/or their original University choice when going through the Clearing process.
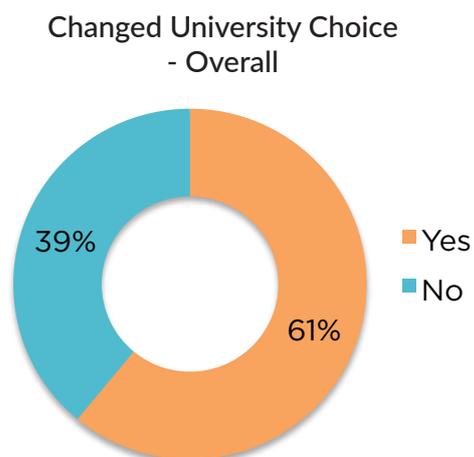
Changed University Choice - Overall

39% No
61% Yes

Figure 17. Breakdown of overall students who changed their original University choice

Changed University Choice - University of Manchester

51% No
49% Yes
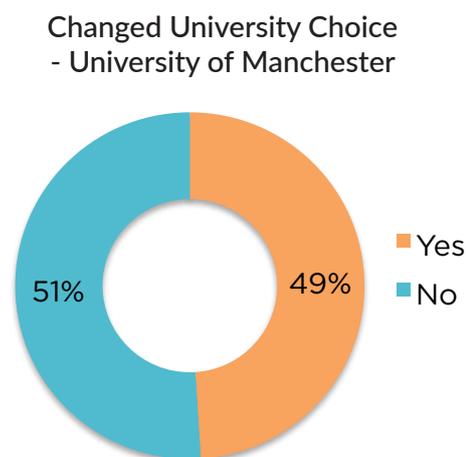
Figure 18. Breakdown of students who changed their original University choice for University of Manchester

Changed Course Choice - Overall

37% Yes
63% No
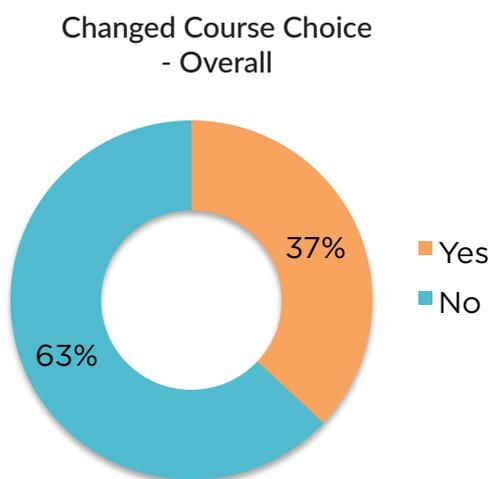
Figure 19. Breakdown of overall students who changed their original course choice

Changed Course Choice - University of Manchester

51% No
49% Yes
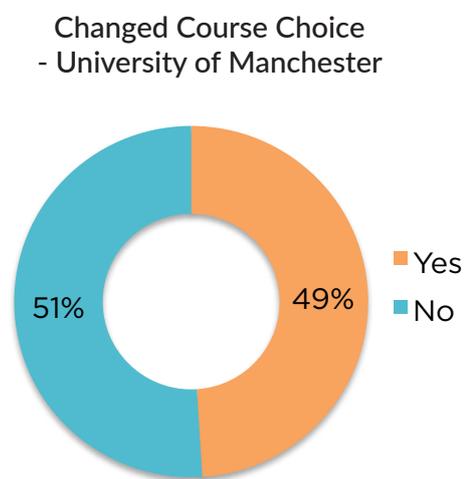
Figure 20. Breakdown of students who changed their original course choice for University of Manchester

Overall, 61% of students changed their University choice but only 37% of students changed their original course choice. Students going to Manchester saw a lower proportion of students change their original course, however, saw a higher proportion of students change their University choice.

Overall 29% of students changed both their course and University choice.

This suggests that students are more concerned with what they study over where they study.

Students were asked which device(s) they used when searching for Clearing places.

Overall desktops were the most commonly used device, with 75% of students using them. Mobile was the next most popular with 59% of students using them and 23% reported that they used a tablet.

Device Usage - Overall
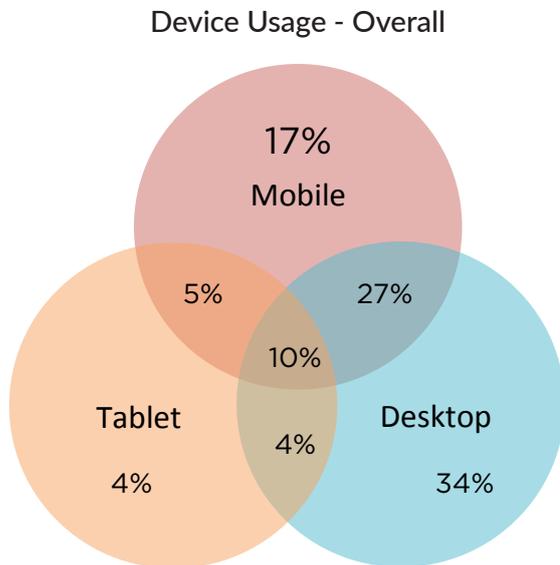
Figure 21. Breakdown of overall respondent device usage when searching for Clearing places

Device Usage - University of Manchester
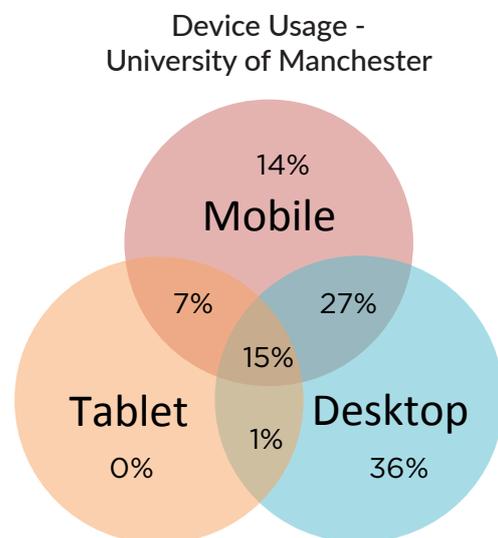
Figure 22. Breakdown of devices used to search for Clearing places – University of Manchester.

Results show that cross-device use was common, with 46% of students declaring they used more than one device during the Clearing process. Cross-device usage from the students going to The University of Manchester was more prominent than the overall NCS results, with 4% more using more than one device.

25% of students responded that they did not use a desktop when searching and 17% of students used only a mobile device.

Students were asked about the search terms they used when looking for Clearing places. Below is a graph of the top 10 search terms.

Top 10 Search Terms

Search Term	Value
Specific course search	353
Specific University search	285
Clearing	148
Clearing 2015	135
UCAS Clearing	123
UCAS	108
League tables	76
Clearing places	68
General University search	55
Location	51

Figure 23. Breakdown of search terms used to find Clearing places

Prescriptive search terms for specific courses and universities were the most popular search terms. The remaining searches were comprised of generic terms such as 'Clearing', 'Clearing 2015' and 'UCAS'.

Below is a word cloud of commonly used words that students used when searching for a Clearing place, excluding brand names.

Figure 24. Most common search terms used when searching for Clearing places

Section 4

Place Acquisition

How Students
Secured a Place

National Clearing Survey 2015

Place Acquisition - Key Findings

1   One in five students secured their place by noon on Results Day.

2   75% of students secured their Clearing place by speaking to someone on the telephone.

3   68% of students contacted more than one University before securing a place. On average, students contacted 2.9 universities during the Clearing process.

When asked how soon they secured a Clearing place, 40% of students said they had accepted a place on Results Day. 18% secured their place the next day, while the remaining 42% took longer than this.

Overall, almost one in five students had secured their place before midday on Results Day, however, almost a quarter of students applying to the University of Manchester had secured their place by noon on Results Day and almost half had done so on Results Day.
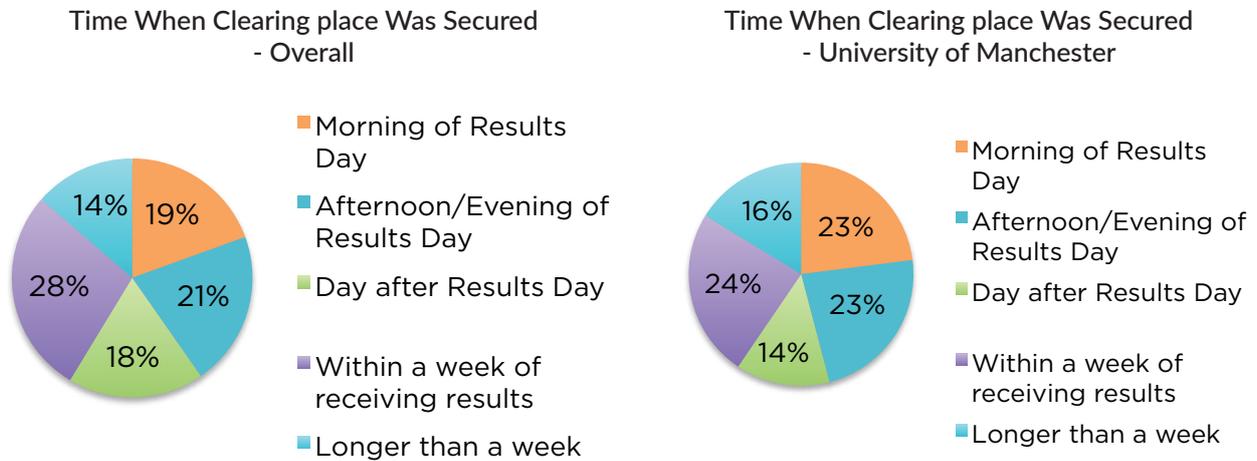
Time When Clearing place Was Secured - Overall

- Morning of Results Day
- Afternoon/Evening of Results Day
- Day after Results Day
- Within a week of receiving results
- Longer than a week

19% | 21% | 18% | 28% | 14%

Figure 25. All NCS respondents: Breakdown of times when Clearing places were secured

Time When Clearing place Was Secured - University of Manchester

- Morning of Results Day
- Afternoon/Evening of Results Day
- Day after Results Day
- Within a week of receiving results
- Longer than a week

23% | 23% | 14% | 24% | 16%

Figure 26. Breakdown of times when Clearing places were secured – University of Manchester

76% of students said they contacted universities over the phone to secure their Clearing place. 23% did so online and the remaining 2% did it either via email or in person. 85% of students going to Manchester secured their place over the phone, this is 9% greater than the average.

How the Clearing places Were Secured

- Overall
- University of Manchester

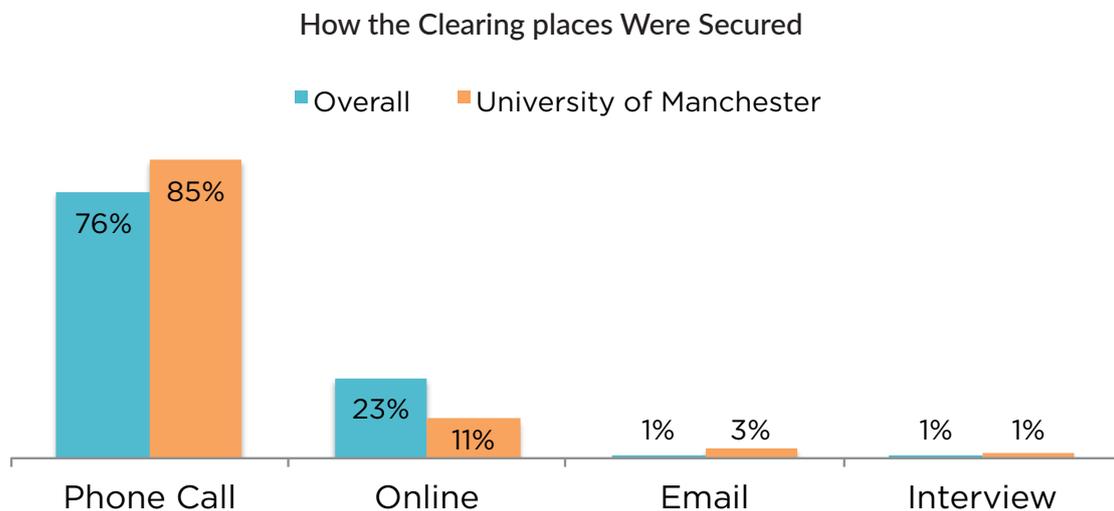|	Phone Call	Online	Email	Interview
Overall	76%	23%	1%	1%
University of Manchester	85%	11%	3%	1%

Figure 27. Breakdown of how students secured their Clearing place

On average, a student contacted 2.9 universities before deciding on their final Clearing place. This suggests that students require further information/advice than what is available to them on online or offline media before they are able to make their decision.

Number of universities Contacted Before Finalising Place
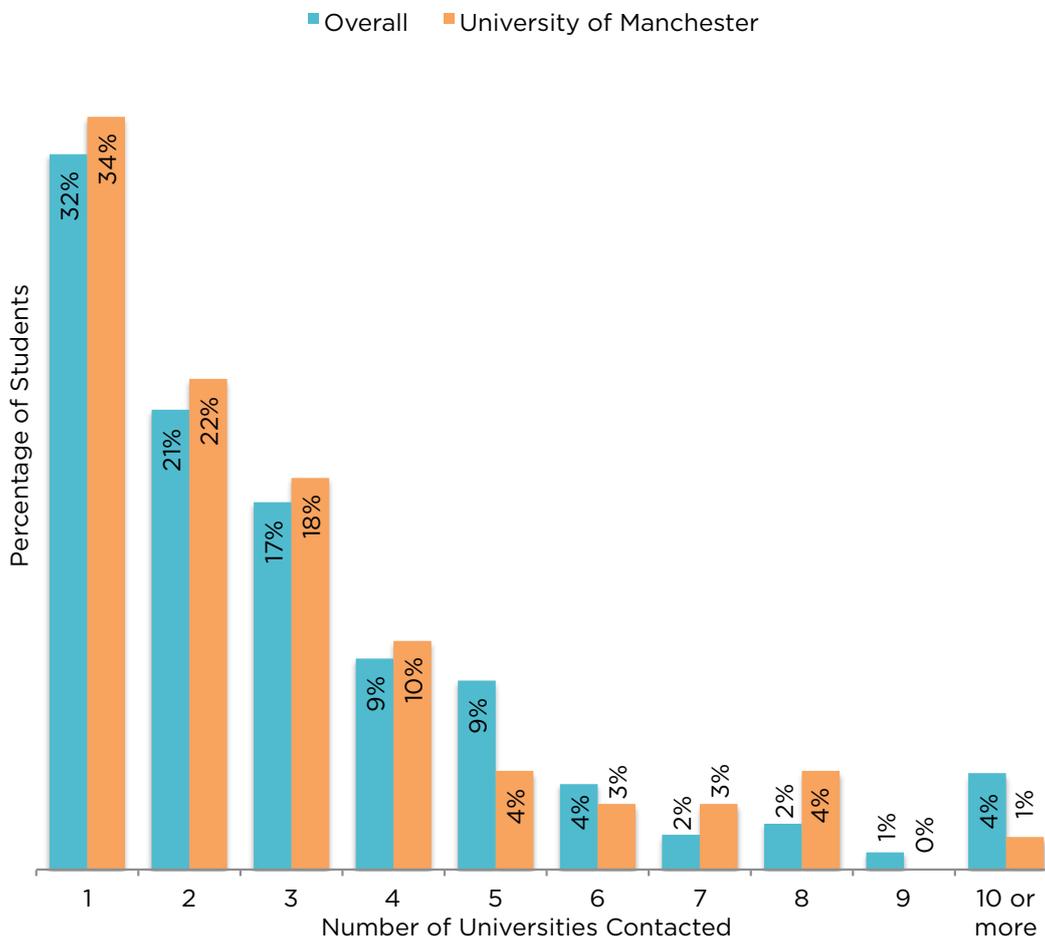
■ Overall   ■ University of Manchester

Figure 28. Breakdown of number of universities contacted before confirming Clearing place

68% of students contacted more than one institution before making their final choice. 34% of students going to The University of Manchester contacted only this University before securing their place.

Overall 22% of students contacted more than five universities during the Clearing process, compared to only 15% for students going to The University of Manchester.

Conclusion

Clearing has traditionally been seen as a route into University for students that do not achieve their predicted grades. The findings of this survey dispute that assumption and show that many students are using the Clearing process to obtain a place at a University on their terms. As the cost of a course has risen substantially and the choice of provision has increased, students have more control than ever and are using the Clearing process to their advantage. How the sector and individual organisations adapt their strategies to reflect this behavioural change will have a big affect on their ability to attract students.

The majority of students are researching Clearing prior to Results Day, and as their research has moved online the importance of physically visiting a University on an Open Day is being reduced as a result. Two thirds of students had not visited the University they went on to study at but 71% had visited the University website. Informative and enticing website content is more important than ever, with specific course information including course features, benefits and the institution's USPs being key.

The release of A-level results shows the apparent disruption that technology is playing in how students find the right course. 46% of students used more than one device when looking for a course, with 17% only using their mobile and 25% not using a desktop at all. This highlights the need for responsive web content and mobile specific functionality for all media used including click-to-call.

Once results have been released, students display characteristics of urgency moving away from visiting UCAS' website first and instead go straight to the source, the University's website. Websites should be promoted heavily both on search engines and other means on Results Day. With 52% of students starting their research within an hour of receiving their results, being visible early and providing the most relevant information clearly is going to be crucial to make the most impact.

One in five students secured their place by midday on Results Day suggesting that students are extremely active in their hunt for a course. Phoning an institution to secure a place is still by far the most popular method for Clearing students, with our results showing that on average students called three universities before securing a place. There is a need for universities to track which marketing activity is leading to calls and also to ensure that their phone systems are robust enough to handle the call volume on Results Day.

The National Clearing Survey 2015 clearly shows that students will contact multiple universities so having a well trained and competent phone team is a necessity. The survey has highlighted the importance of course information and consequently Clearing phone teams should be well versed on the benefits of each course offered. They should also be able to promote the institutional USPs to the student.

Clearing is now hugely competitive with students having more choice and control than ever before. This, combined with the breadth of information available across numerous channels and the use of multiple devices to both research and secure a place, makes developing a successful Clearing strategy complex for institutions. It will be those institutions that do understand the evolving behaviours of "the Clearing student" and utilise all the data they have to create cross channel strategies that clearly address the needs of their prospective students who will be successful at filling their places.

To reflect the changing attitudes and methods people use to engage with the Clearing process the National Clearing Survey will be updated and then repeated in 2016.

Why Take Part in the National Clearing Survey 2016?

Thank you for participating in the National Clearing Survey 2015. The Insights division at Net Natives are now looking for institutions who wish to take part in the National Clearing Survey 2016. There are a number of benefits to your institution if you choose to participate:

- Comparison of data from your 2015 survey (this survey) benchmarked against your 2016 National Clearing Survey data and the average findings

- Chance to become part of the steering group to inform questions for the 2016 Survey

- Survey branded to your institution to share with your 2016 Clearing students

- Bespoke report for your institution which will allow you to benchmark the actions of your Clearing students with the average findings

- Receive a copy of the report before non participant institutions

- 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!

There are a limited number of places open to take part so get in touch soon.

Click here to be a part of the National Clearing Survey 2016

www.nationalclearingsurvey.com/take-part-2016

About Net Natives

Net Natives is the UK's leading digital agency for the education sectors, we get students and make lives better through effective, powerful digital thinking and execution. Since 2008, we've blended strategic understanding, data science and digital expertise with our proprietary marketing SaaS technologies to create engaging experiences that deliver clear, measurable outcomes for our clients across the UK, Europe, Asia Pacific and North America.

Net Natives' Analytics, Insights and Research team, the people behind the National Clearing Survey, are the brains behind EduRank; the UK's only Digital Benchmarking Tool for the Education Sector. This team also work on a number of national research projects with partners in the HE sector, as well as client specific projects. Net Natives are now in the process of planning the National Clearing Survey 2016 and will be announcing other education research initiatives imminently.

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