

# Clearing 2023 Preview

14 December 2022


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UCAS



# Today's agenda

1. Insights and lessons from Clearing 2022
  - End of Cycle 2022 Clearing Survey
  - Decline my Place 2022
2. UCAS Clearing Solutions 2023
  - Shaping our Clearing 2023 media offer
3. Q&A



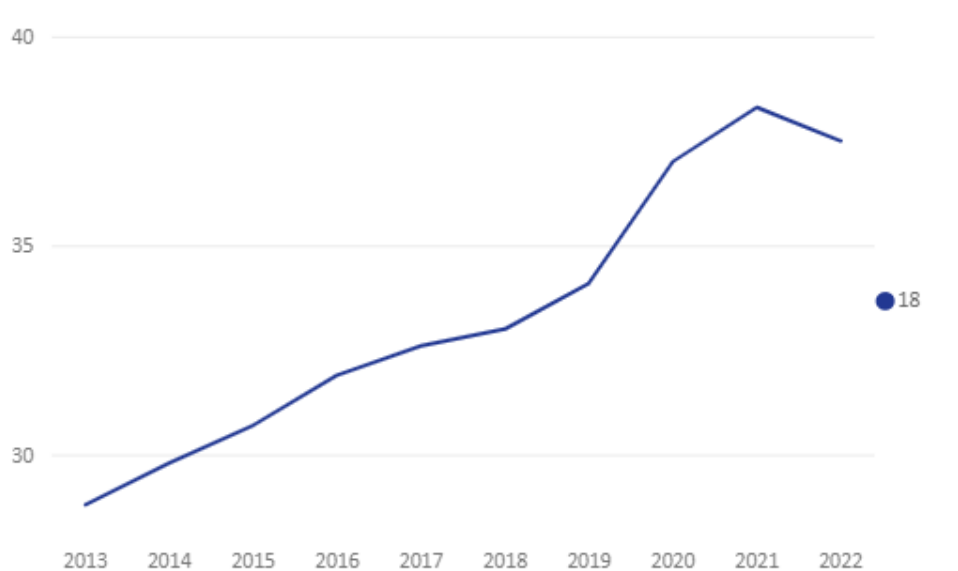
# Insights and lessons from Clearing 2022

- End of Cycle 2022 Clearing Survey
- Decline my Place 2022

UCAS

# 2022: End of Cycle

Proportion of the 18 year old population who were accepted



18 yo entry rate at 37.5%

Accepted UK applicants 490K

Growth for middle and lower tariff providers

# The three Clearings

Main scheme Clearing

Direct to Clearing

Decline My Place

**21,000**

unplaced on JCQ  
results day

**12,000**

placed

**12,500**

placed

**37,000**

applicants used

**20,000**

placed

# Inside the Mindset of Clearing Applicants:

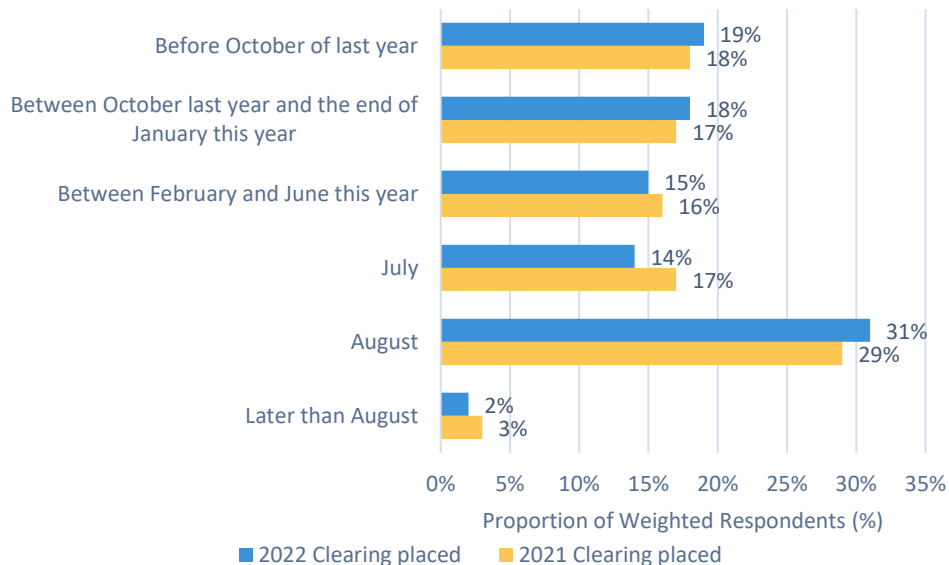
## Introducing our End of Cycle 2022 Clearing Survey

- The 2022 UCAS clearing survey was sent out in September 2022 to a sample of 2022 cycle applicants who had obtained a place at a university or college using Clearing.
- In total, around 1,300 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 2022 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.
- This year we wanted to understand how students had navigated Clearing in 2022 and investigate two key factors: the reduction in disruptions arising from the COVID-19 pandemic, and the rising costs of living.

# Clearing in context

# Research starts early, with only a third starting their research in August

## Q.5 When did you start researching the university or college you were placed at through Clearing?



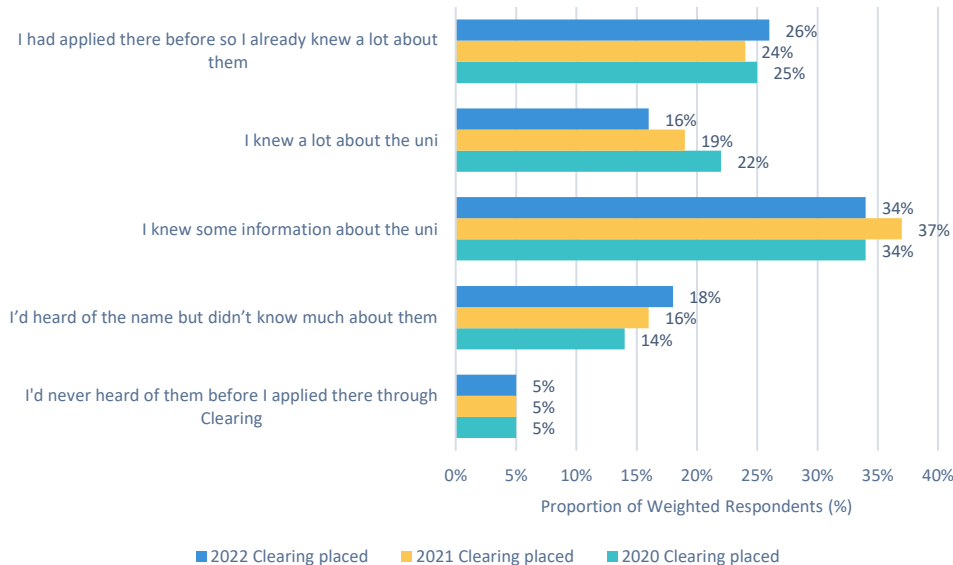
62% had researched the university or college they were placed at through Clearing when they made their original five choices (up from 56% in 2021)

Q.5 When did you start researching the university or college you were placed at through Clearing?  
(vs 2021).  
2022 survey; No. respondents: 1,292



# The majority of clearing applicants know at least something about their chosen university beyond just the name

**Q.3 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?**



- 26% had applied to their university before, so already knew a lot about it.
- But less than half know a lot about their university of choice (42%)
- Only 5% have never heard of their chosen university before they applied – this remains consistent year on year.

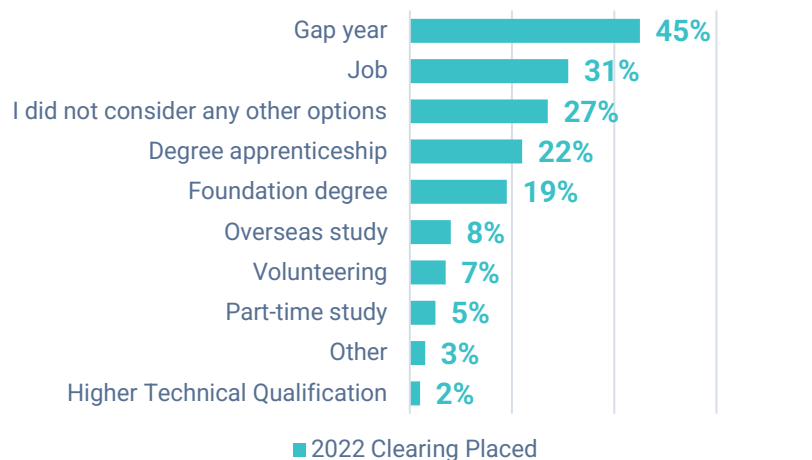
**Q.3 Thinking about the university or college you were placed at through Clearing, how much do you feel you knew about them before applying to them through Clearing?**

(vs 2021 and 2020).

2022 survey; No. respondents: 1,292

# Those who got a place in clearing often considered other options

Q.17 While you were searching for a place in Clearing, did you at any point consider any of the following options instead of going to university or college? Please select all that apply.



2022 was a joint low of 27% of applicants not considering any other options (-7%pts vs 2021).

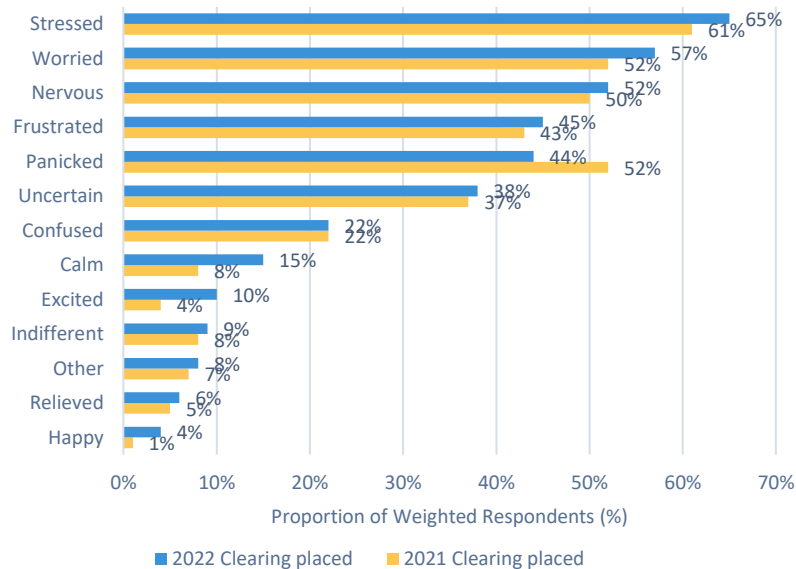
'Degree apprenticeship' rose from a low of 15% in 2020 to a high of 22% in 2022, perhaps reflecting considerations around cost of living,

'Gap year' rose from a low of 32% in 2020 to a high of 45% in 2022, likely reflecting how travel has opened up again.

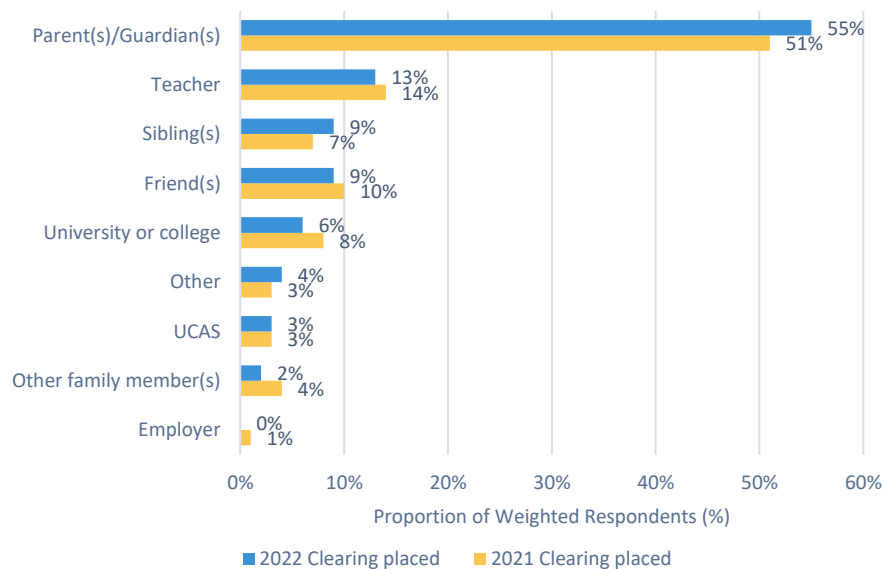
Q.17 While you were searching for a place in Clearing, did you at any point consider any of the following options instead of going to university or college? Please select all that apply.  
No. respondents: 1,289

# Entering clearing due to not being accepted at the university of choice can be a stressful time, particularly at the moment they realised they would need to find a place

Stress, worry and nervousness are all up year on year, perhaps relating to other external factors adding to perceived importance of university



Parents or guardians are the first people applicants go to when they find out they are entering the clearing process



Q.16 Who did you speak to first after finding out you needed to find a place using Clearing? (vs 2021) Question asked to those who weren't accepted at their firm/insurance but found a place in Clearing 2022 survey; No. respondents: 348

# Channel use

## Applicants find their places in two ways -

### Passive (discovery)

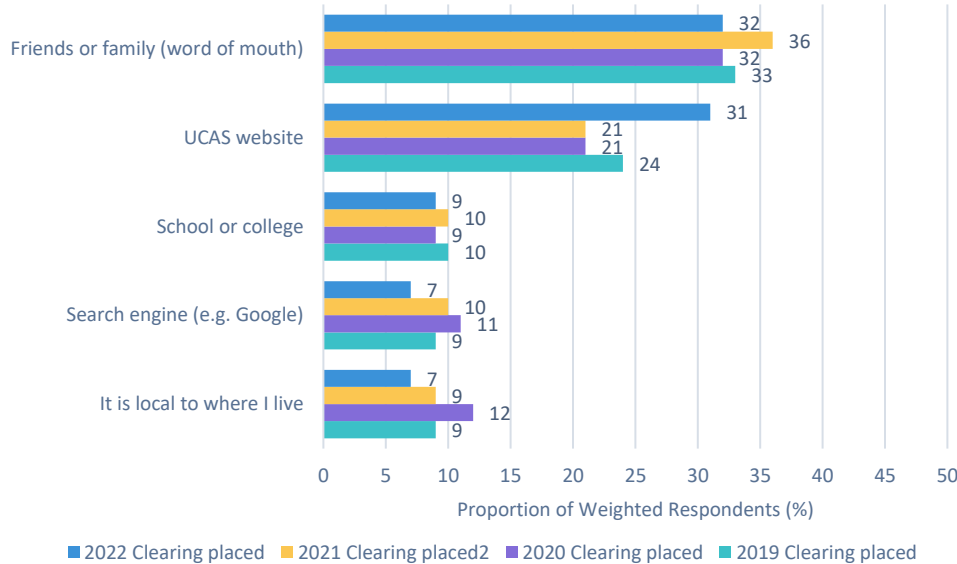
- **UCAS is now as influential as word of mouth**
- Their most cited sources of first hearing about the place they ended up were word of mouth and the UCAS website

### Active (searching)

- When **directly searching**, university websites become more important, and **UCAS is still the preferred option**
- Passive discovery is **not happening through out of home advertising**, but is instead focused online

# UCAS is now as influential as word of mouth for hearing about clearing places

Q.14 Where did you first hear about the university or college you found a place at in Clearing?

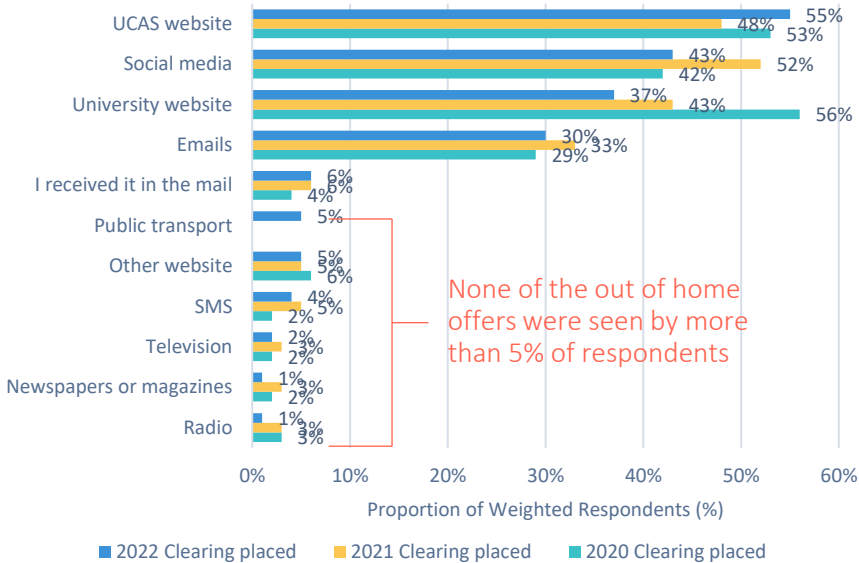


- In 2022, the largest proportion (32%) first heard about the university or college they found a place at in Clearing through **friends or family**.
- **The UCAS website** as a source was up +10%pts year on year and at its highest response rate ever.

Q.14 Where did you first hear about the university or college you found a place at in Clearing?  
 (Top five responses vs 2021, 2020 and 2019).  
 2022 survey; No. respondents: 1,293

# Most placed students discovered their university through the UCAS website

Q.35 In which of the following places, if any, did you see advertisements from the university or college you're currently placed at during the Clearing period? Please select all that apply.

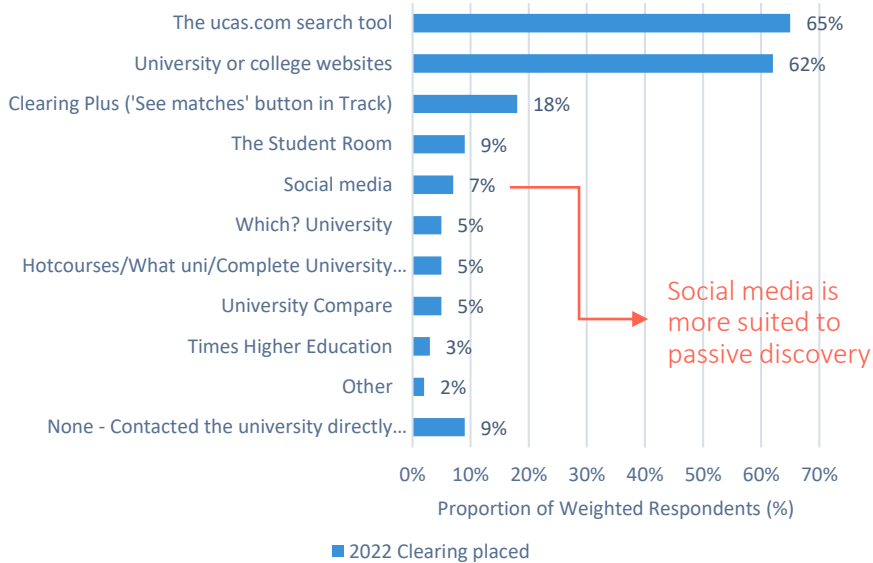


- This year the **UCAS website** was the most likely to get their attention, but **social media** has a key role to play.
- **University websites** are trending downwards.

Q.35 In which of the following places, if any, did you see advertisements from the university or college you're currently placed at during the Clearing period? Please select all that apply. (vs 2021).  
2022 survey; No. respondents: 1,226

# When directly searching, university websites become more important, although UCAS is still the preferred option

Q.36 When you were looking for a place in Clearing, where did you search for places? Please select all that apply.

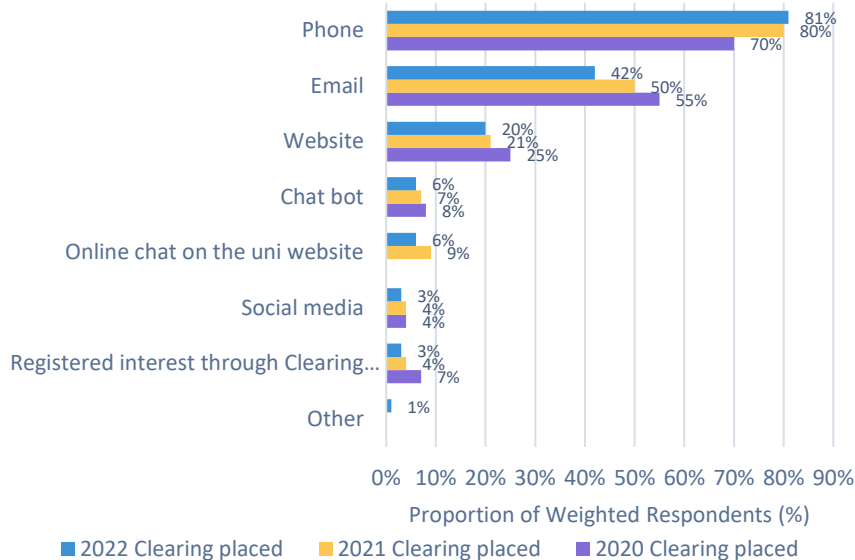


Q.36 When you were looking for a place in Clearing, where did you search for places? Please select all that apply. 2022 survey; No. respondents: 1,289



# There is a changing use of channels – more direct contact may allay anxieties about getting a place

Phone is still the most common way to reach universities but email is falling back



Q.49 How did you contact universities or colleges to discuss finding a place through Clearing? Please select all that apply. (vs 2021 and 2020) 2022 survey; No. respondents: 1,287

Many students believe that phone calls gave them the best chance at finding the right university

“Talk to them on the phone”  
- Advice from a clearing applicant

“Wake up early from 8 as you’re against the rest of the UK and leaving it too late especially if clearing through a competitive uni is juts such a huge gamble”  
- Advice from a clearing applicant

“Call clearing as early as possible and don’t worry there’s always likely a place.”  
- Advice from a clearing applicant

“Start calling as soon as clearing opens, and talk to all the unis yourself.”  
- Advice from a clearing applicant

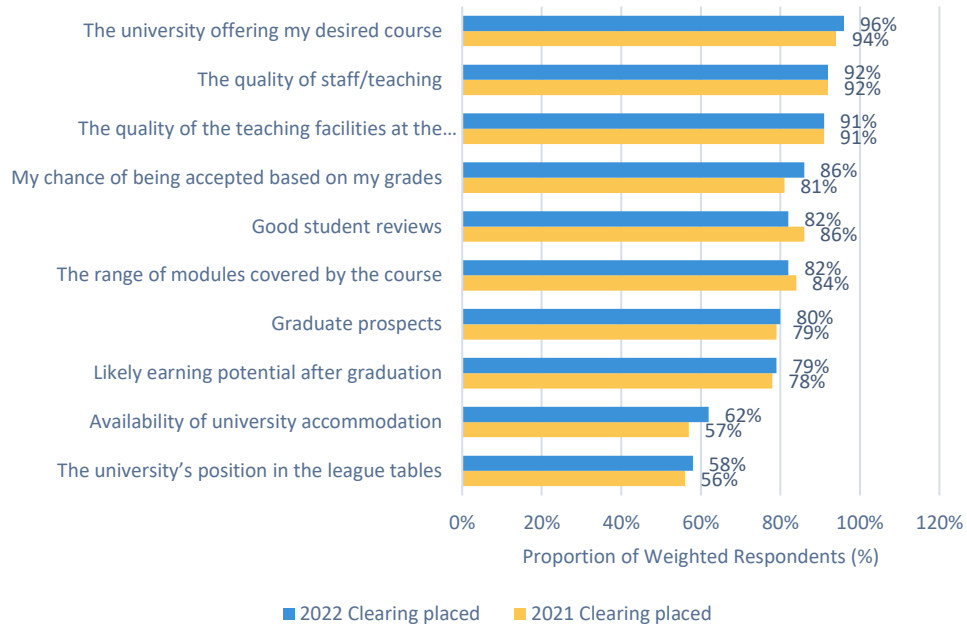
“Call early.”  
- Advice from a clearing applicant

Q56: If you could give one piece of advice to a student looking for a place through Clearing in future, what would it be?

# Decision making

# Applicants still want to know that they are getting a quality education, in spite of other concerns

Q.14 How important were the following factors when choosing your place in Clearing?



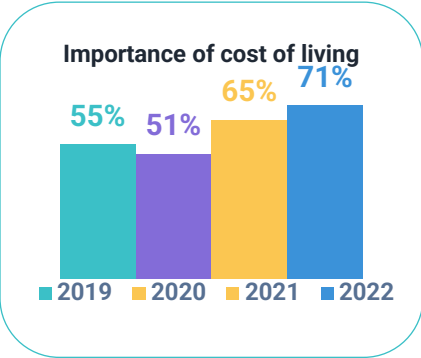
Q.14 How important were the following factors when choosing your place in Clearing?  
(Top five responses vs 2021, 2020 and 2019 - Very important + Important)  
2022 survey; No. respondents: 1,293

# Cost of living is increasing in importance, alongside concerns about accommodation

## Cost of living

- Cost of living increased as a lifestyle factor for the fourth year in a row.

Cost of living at uni was +6%pts more important to placed applicants than in 2021. This factor was also up by +16%pts vs 2019:

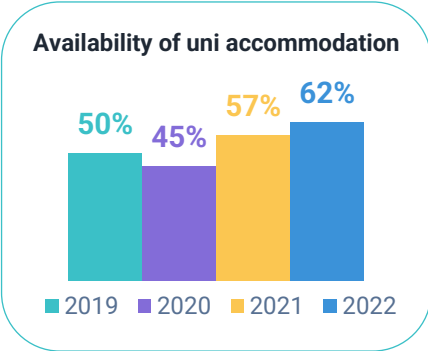


Q. 13 How important were the following lifestyle factors when choosing your place in Clearing? (Top five responses vs 2021, 2020 and 2019 - Very important + Important) 2022 survey; No. respondents: 1,294

## Accommodation availability

- There is an increase in students going to clearing to guarantee accommodation

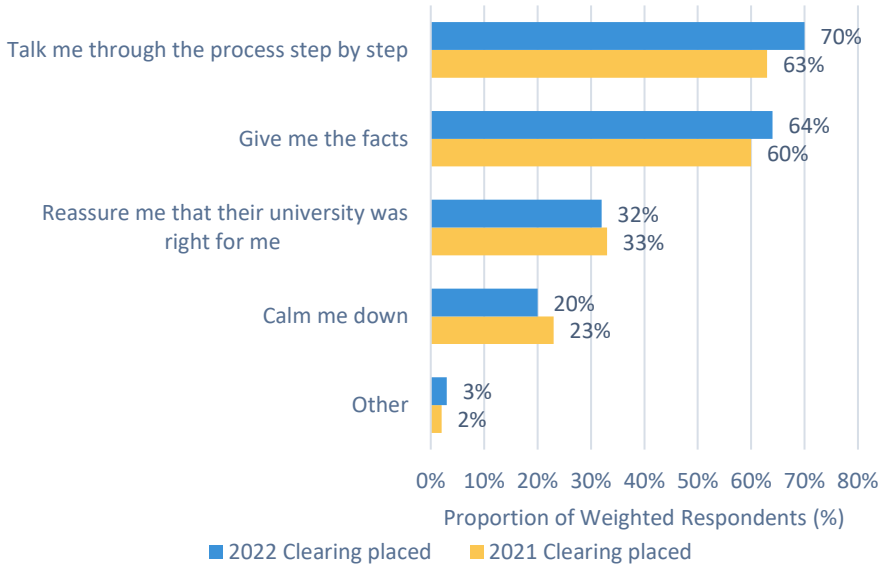
The availability of uni accommodation was 5% more important to placed applicants than in 2021. This factor was also up by 12% vs 2019:



Q.14 How important were the following factors when choosing your place in Clearing? (Top five responses vs 2021, 2020 and 2019 - Very important + Important) 2022 survey; No. respondents: 1,293

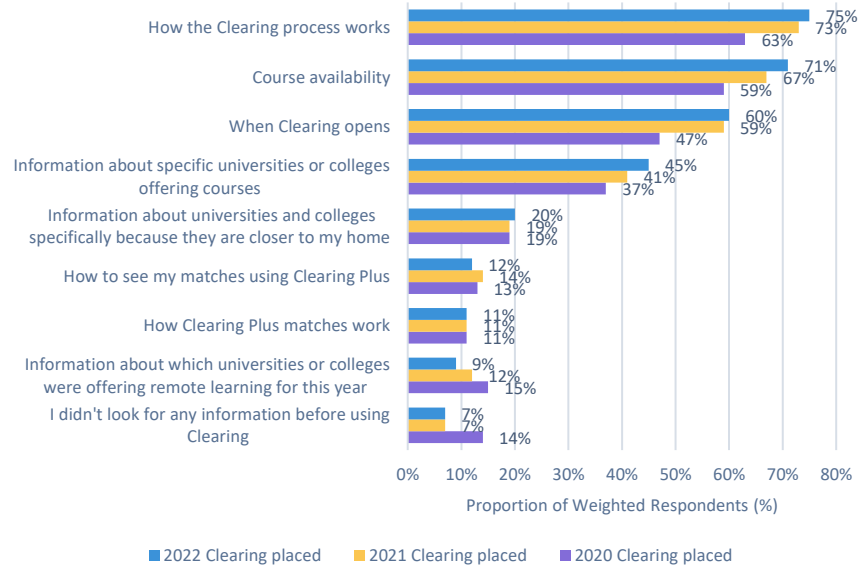
# Applicants want to understand clearing fully, through detailed information around the process and courses

Where family and friends can provide emotional support, the majority want practical tips from their university or college.



Q.18 While you were searching for a place in Clearing, how did you want the universities or colleges you contacted to communicate with you? Please select all that apply. (vs 2021). 2022 survey; No. respondents: 1,286

Technical information about the clearing process and options are the most sought after.



Q.11 What information did you look for about Clearing before you used the Clearing service? Please select all that apply. (vs 2021 and 2020). 2022 survey; No. respondents: 1,294

**Decline my place in numbers**

# Decline My Place in 2022

**37,000**

applicants used Decline My Place

**5%**

of 694,000 applicants

of which **20,000**

went on to be placed through Clearing

**4,800**

who used Decline my place in 2021  
reapplied this year

**59,000**

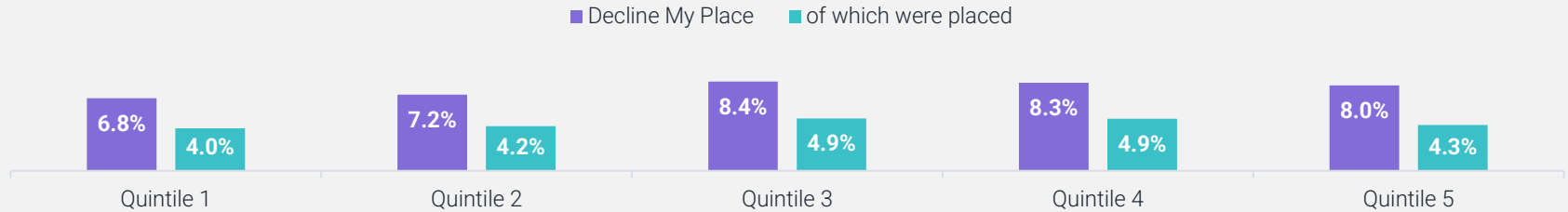
applicants were placed through Clearing

of which **1 in 3**

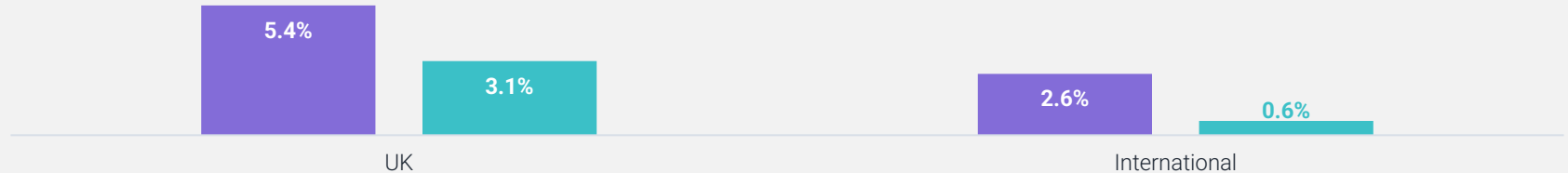
had previously used Decline My Place

# More advantaged applicants are utilising Decline My Place

UK 18 year old Decline My Place usage by POLAR4 quintile, 2022



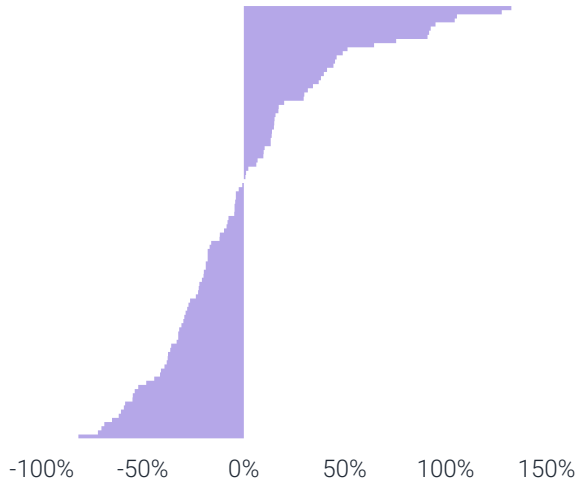
Decline My Place usage by domicile, 2022





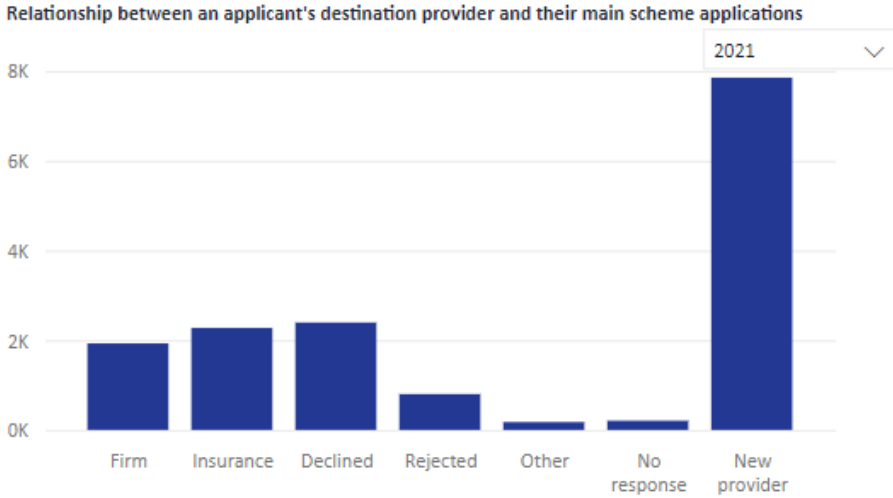
# Higher tariff biggest winners and losers of placed applicants

Proportional net change in placed applicants due to Decline My Place by provider

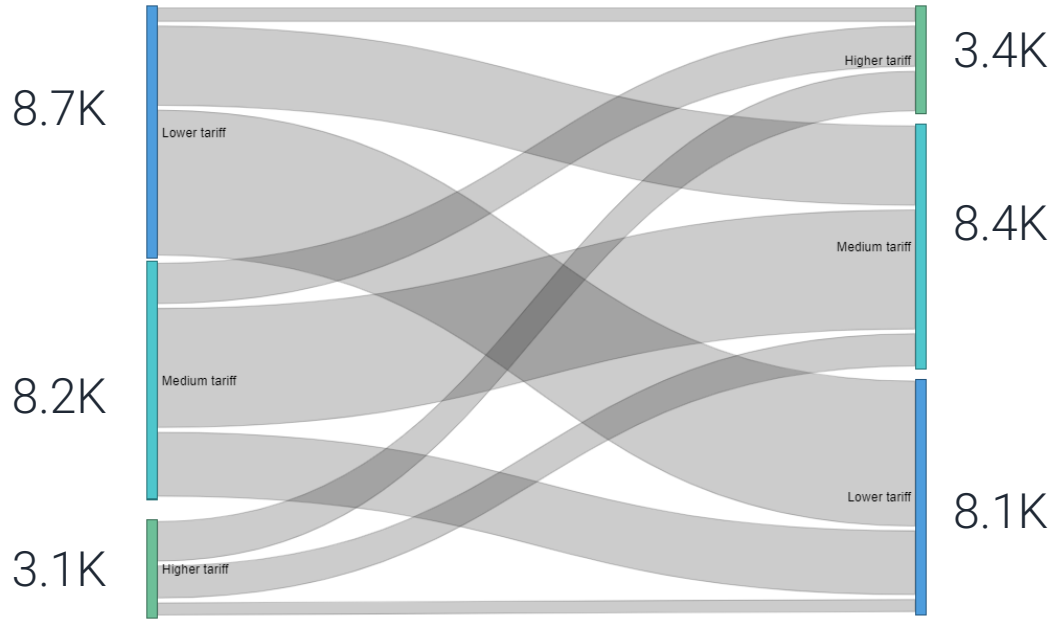


	Tariff band	Net change	Proportional net change
1	Higher tariff	+160	+132.5%
2	Higher tariff	+70	+127.8%
3	Medium tariff	+230	+105.6%
4	Medium tariff	+310	+104.5%
5	Higher tariff	+130	+95.0%
101	Higher tariff	-50	-65.3%
102	Higher tariff	-70	-69.1%
103	Higher tariff	-40	-70.6%
104	Medium tariff	-120	-72.2%
105	Higher tariff	-50	-82.0%

# DMP students engage with new HEPS

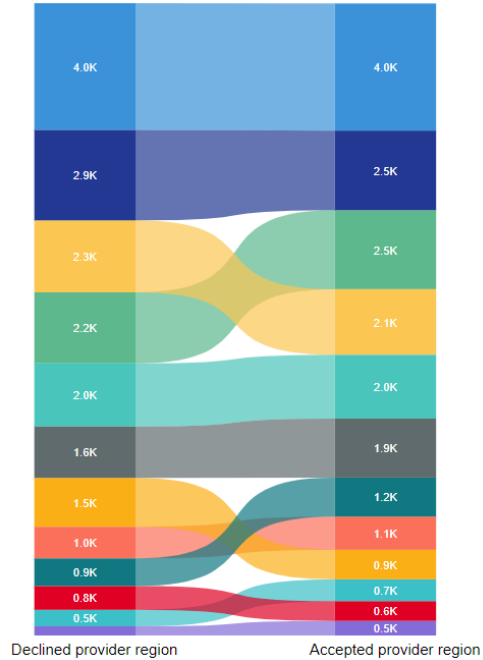


# Decline My Place mostly used to move within tariff band



Lower tariff: **-600**  
 Medium tariff: **+260**  
 Higher tariff: **+340**

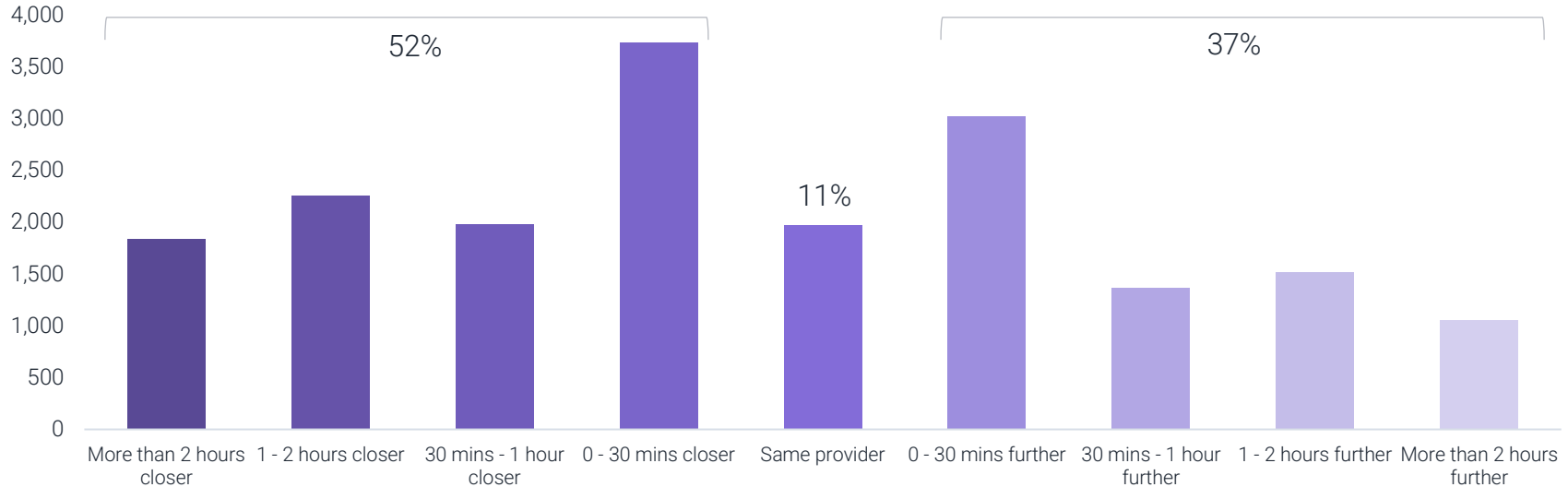
# The South and Scotland lose out on placed applicants



Provider region	Proportional net change
Northern Ireland	59.5%
Wales	40.8%
North East	31.9%
Yorkshire and The Humber	14.8%
East Midlands	11.3%
East of England	5.1%
West Midlands	1.2%
London	0.2%
North West	-8.7%
South East	-11.8%
Scotland	-17.0%
South West	-39.4%

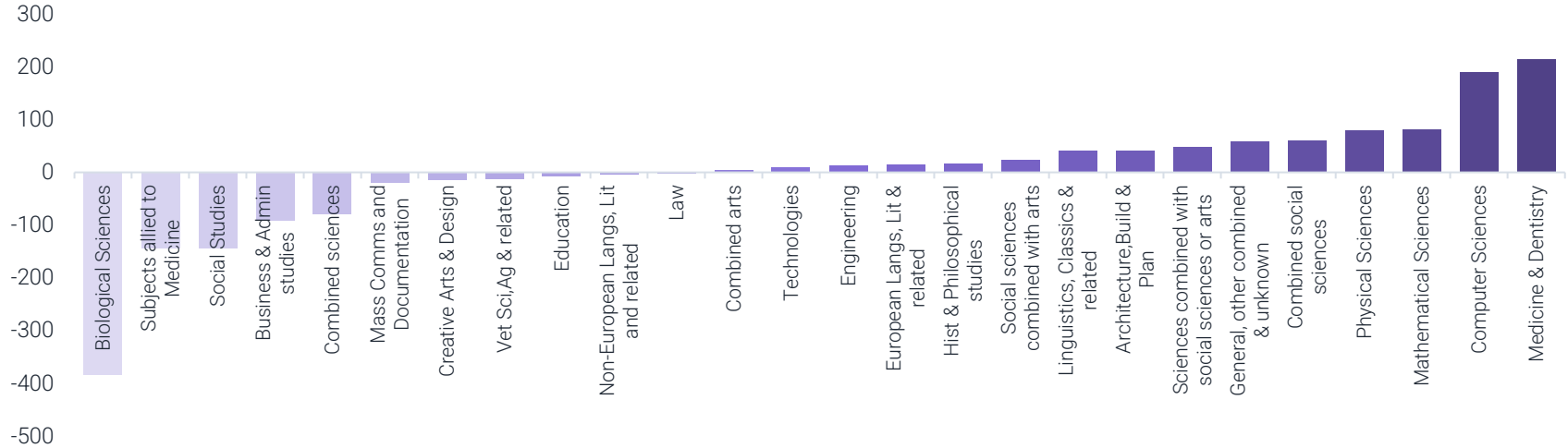
# Decline My Place used to find a place closer to home

Difference between distance to placed provider and distance to declined provider



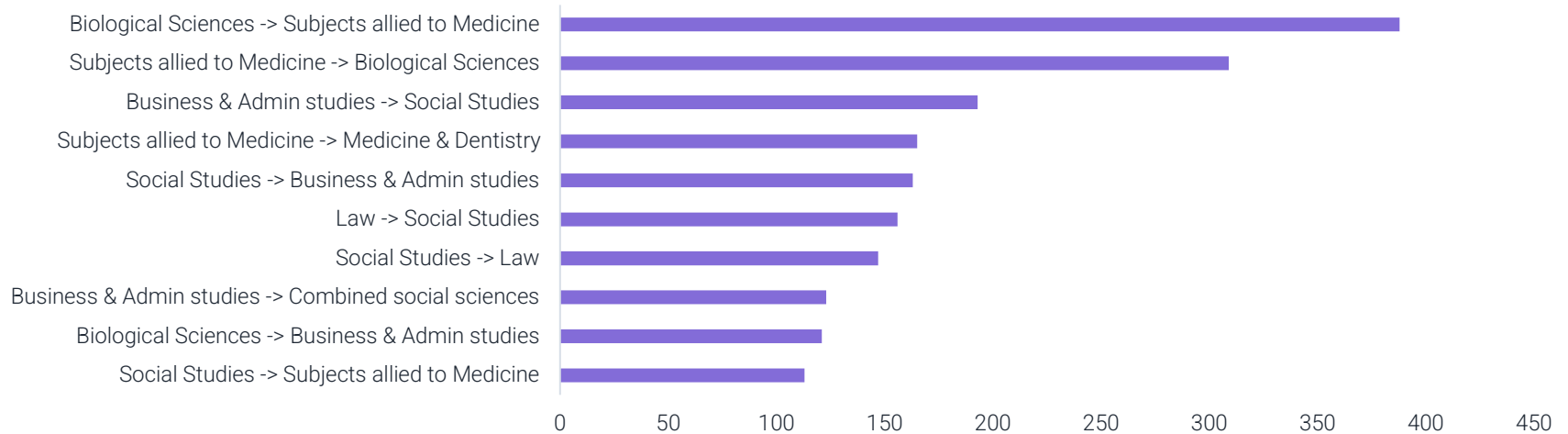
# Medicine and dentistry gains the most through Decline My Place

Net change in placed applicants through Decline My Place by JACS3 subject group



# Some choose to switch disciplines, particularly in biology and health

Common pathways of placed applicants who change their subject group through Decline My Place

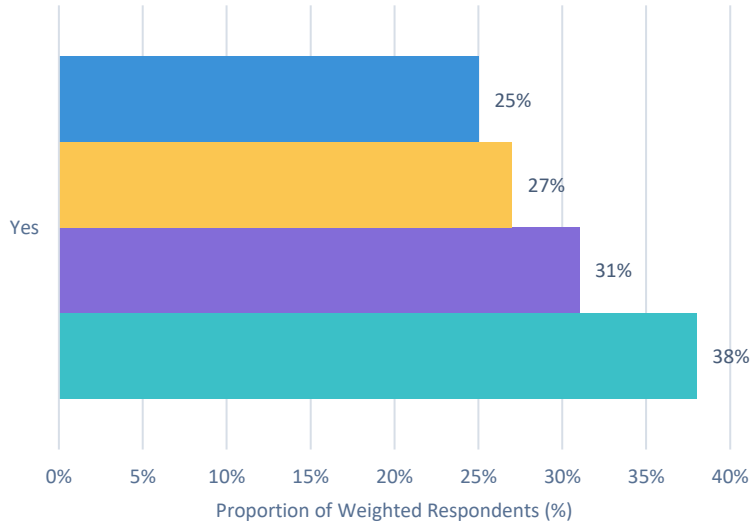


**Direct to Clearing and decline  
my place – student mindset**



# Those who applied directly to clearing are increasingly planning this in advance

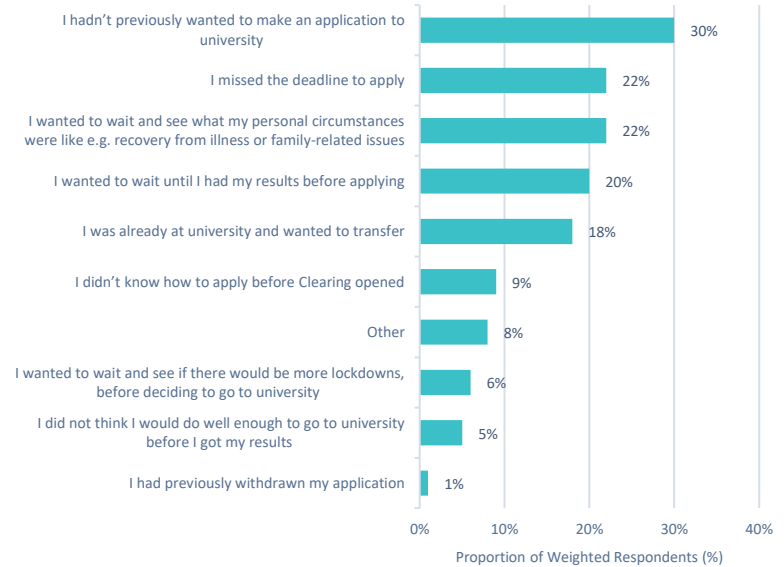
Q.8 Did you always plan to apply directly to Clearing?



■ 2019 Clearing placed ■ 2020 Clearing placed ■ 2021 Clearing placed ■ 2022 Clearing placed

Q.8 Did you always plan to apply directly to Clearing?  
Vs 2021, 2020 and 2019  
2022 survey no. respondents: 284

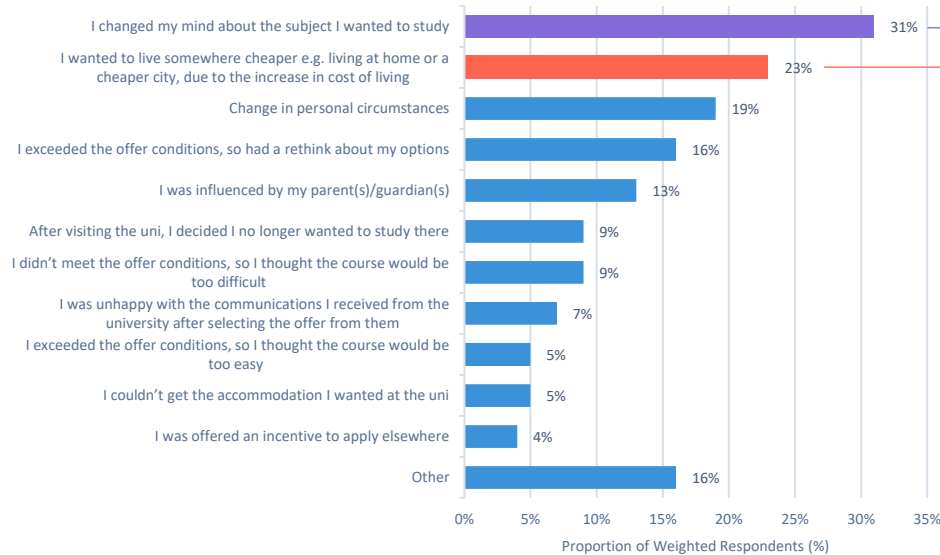
Q.9 Why did you decide to apply directly to Clearing? Please select all that apply.



Q.9 Why did you decide to apply directly to Clearing? Please select all that apply.  
2022 results  
2022 survey; No. respondents: 99

# Again the main influences are flexibility - responding to changing mindsets or personalities since the original application stage

**Q.43 Which of the following factors, if any, influenced your decision to decline your firm choice university or college? Please select all that apply.**



The most common reason to decline a firm place was a **change of heart** about what subject to study.

*"I realised the course and uni wasn't right for me a few months after firming my offer."*

*"I decided to release to Clearing and go for the uni in my hometown due to family circumstances"*

*"I had changed my mind, since I felt the clearing course was more appropriate within the field"*

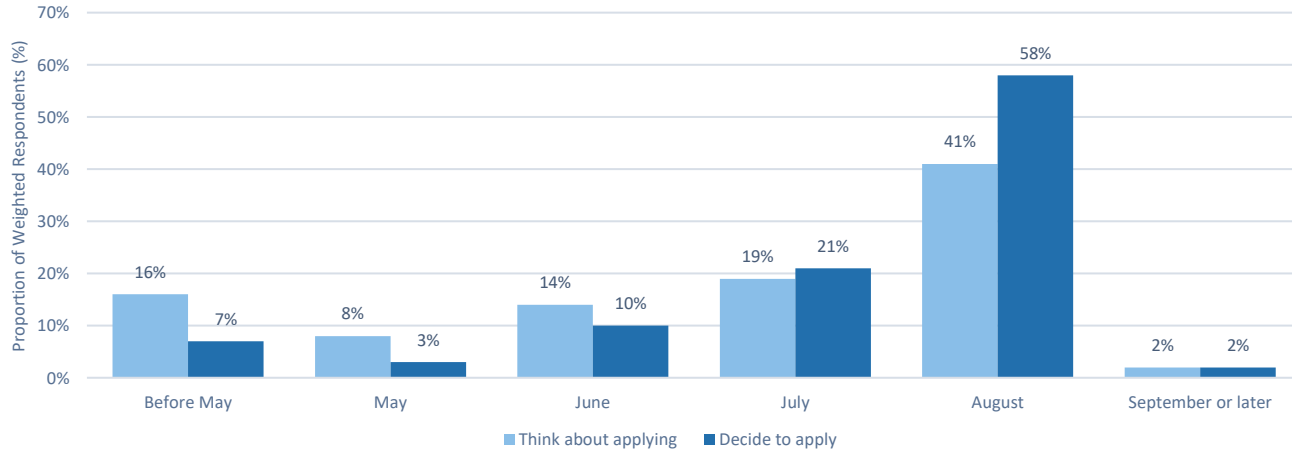
But 23% said they were influenced by the cost of living.

**Q.43 Which of the following factors, if any, influenced your decision to decline your firm choice university or college? Please select all that apply.**

Question only asked to those who released themselves into Clearing# 2022 survey; No. respondents: 408

# Over 50% of those who had declined their place had already considered this option before August

Q.39 When did you start thinking about applying somewhere else?  
Q.40 When did you decide you would apply somewhere else?

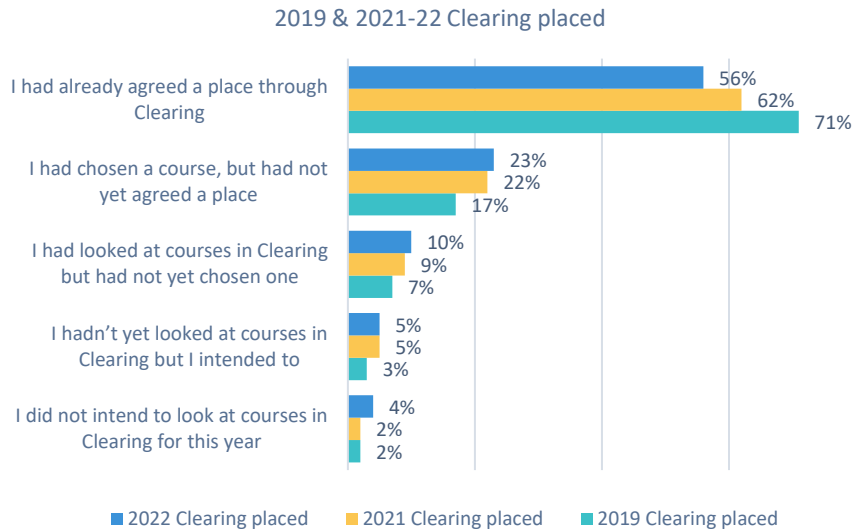


46% claim that they changed their mind about studying at their original choice before results day, up +3%pts YoY, and up +12%pts vs 2019.

Q.39 When did you start thinking about applying somewhere else?  
Q.40 When did you decide you would apply somewhere else?  
(Questions only asked to those who released themselves into Clearing)  
2022 survey; No. respondents: 408

# There has been a decline in those who had a place already decided

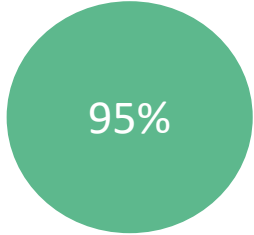
## Q.42 When you declined your firm choice and released yourself into Clearing, what were your plans?



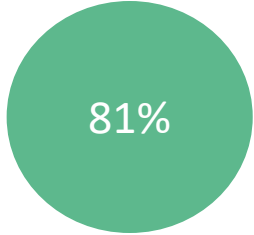
- The proportion of applicants who released themselves into clearing and already had agreed a place continues to decline.

### Q.42 When you declined your firm choice and released yourself into Clearing, what were your plans?

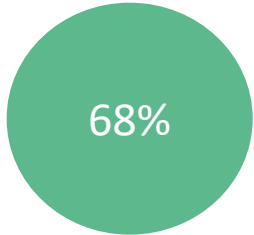
Question only asked to those who released themselves into Clearing  
2022 survey; No. respondents: 411



Confident they made the right choice for them



Had a good or excellent experience of clearing



Found the process easy

*"Clearing helped me find a course that was completely suited to me; so while I felt disappointment over not getting into my first choice, my clearing choice has made me hopeful and excited for what the future has to offer!"*

*"Happier with the course than my original application and excited for the university I will be studying at"*

*"Absolutely buzzing about this course, is far better for me than any of my original courses and I cannot wait."*

*"Clearing can open your mind to new options you hadn't considered when you made your first choice."*

*"I finally discovered clearing I didn't feel supported but they reassured me and it sounded so easy"*

# UCAS Clearing Solutions 2023

- *Shaping our Clearing 2023 media offer*

UCAS



# Clearing 2023:

## A solutions-focused media approach

3 core principles:

### Responsive



– meeting current customer needs & market trends

### Effective



– coherent & powerful packages that amplify performance

### Transparent



– simple & without unexpected product combinations

# Clearing 2023: Using multi-channel campaigning to deliver results

Our multichannel campaigns, combining multiple touchpoints:

- build brand awareness throughout the Clearing period
- put you front of mind for students on results day and beyond
- deliver more conversions, with tangible ROI



2.9x better conversion than single-channel

100s of data points for precise targeting

Tracking through to application & acceptance





# Clearing 2023: A multichannel campaign case study

Clearing 2022 campaign including email, display and paid media (£118k spend):

### Summary



**70,492**  
Unique applicants contacted



**250**  
Applied via Clearing

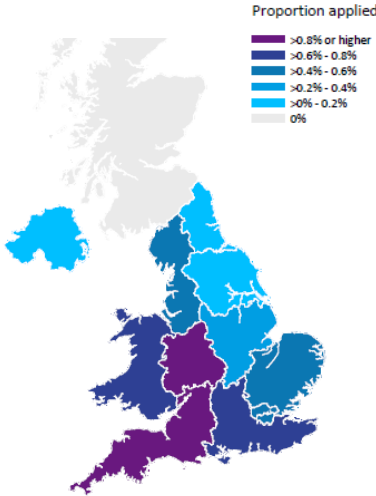


**0.35%**  
Proportion applied



**214**  
Accepted

### Proportion applied by UK region



### Top three regions by those who applied

Correspondence region	Unique applicants contacted	Applied	Proportion applied
South West	2,931	43	1.47%
South East	5,650	39	0.69%
London	7,993	34	0.43%

**Only UCAS**  
Can track exactly how your campaign translates into applications & accepts

# UCAS Clearing Solution 2023:

## Simple, powerful multichannel packages

All package types are being carefully designed to include:

- Multiple products across multiple channels in every package – using the right combinations to reach different types of students at touchpoints throughout Clearing
- Products that build awareness from the start of Clearing on 5 July – to help maximise engagement and conversion later, through results day and beyond
- A range of options with different price points – offering choice and meeting needs of different types of providers with different objectives and budgets

Package type	Package option	Quantity available*
<b>Complete Clearing packages</b> (pricing starts from £13k*)	Platinum	10
	Gold	20
	Silver	15
	Bronze	30
<b>Specialist audience packages</b> (pricing starts from £10.5k*)	Tariff releases	7
	Widening participation	3
	International	5
	SQA results day	20
<b>Subject specific packages</b> – 29 subjects across 3 tiers (pricing starts from £5k*)	Gold	1 per subject
	Silver	3 per subject
	Bronze	4 per subject
*Subject to change until official inventory release, Jan 2023		

# Complete Clearing packages

Fully-rounded provider level options that cover all stages – brand awareness, intent and conversion (5 July – 8 Sept)

**Perfect for providers that want to:**

- Present a full picture of what their university or college as a whole has to offer
- Promote a wide array of different course or subject types in Clearing
- Target potential students using a range of different types / combinations of criteria, such as location, achievement, subject and more

Pricing starts from £13k\*

Channels included*:	Package option:			
	Platinum	Gold	Silver	Bronze
Sponsored social	✓			
UCAS.com	✓	✓	✓	✓
Social / Google	✓	✓	✓	✓
Email	✓	✓	✓	
Clearing plus enhanced	✓	✓	✓	✓
Package quantity available:	10	20	15	30

\*Subject to change until official inventory release, Jan 2023

# Specialist audience packages

Options for concentrating activity on a specific specialised subset of students throughout Clearing (5 July – 8 Sept)

## Ideal for providers that want to:

- Focus on reaching students released by institutions in a particular tariff-band, or who have widening participation as a core Clearing objective
- Target international students, or Scottish-based students (including on SQA results day)
- Ensure all their Clearing brand awareness, intent and conversion activity (July to September) is optimised for reaching the specified audience

Pricing starts from £10.5k\*

Channels included*:	Package option:			
	Tariff releases	Widening participation	International	SQA results
UCAS.com	✓	✓		
Social / Google	✓	✓	✓	✓
Email	✓	✓	✓	✓
Clearing plus enhanced	✓	✓	✓	✓
Package quantity available:	7	3	5	20

\*Subject to change until official inventory release, Jan 2023



# Subject specific packages

Showcase individual subject areas to the right audience in the right places across Clearing (5 July – 8 Sept)

## Ideal for providers that want to:

- Promote a specific subject area(s) throughout Clearing (July to September) right across the awareness, intent and conversion stages
- Focus on building awareness of their Clearing offer primarily at subject level, rather than on an institution-wide basis
- Ensure the Clearing content they present to potential students focuses first-and-foremost on the topic

Pricing starts from £5k\*

Channels included*:	Package option:		
	Gold	Silver	Bronze
UCAS.com	✓	✓	✓
Social / Google campaign	✓	✓	
Email	✓		
Clearing plus enhanced	✓	✓	✓
Package quantity available:	1 per subject (29 subjects)	3 per subject (29 subjects)	4 per subject (29 subjects)

\*Subject to change until official inventory release, Jan 2023

# Subject specific packages:

## 29 subject areas available across 3 price tiers

- Pricing within Gold, Silver and Bronze subject packages to be tiered by subject popularity (based on search demand)
- 3 pricing tiers range from tier 1 (highest search volume subjects) to tier 3 (lowest search volume subjects)

Price tier*	Subject*		
<b>Tier 1</b>	<ul style="list-style-type: none"> <li>▪ Accounting and Finance</li> <li>▪ Biology</li> <li>▪ Business</li> <li>▪ Chemistry</li> </ul>	<ul style="list-style-type: none"> <li>▪ Criminology</li> <li>▪ Engineering</li> <li>▪ Law</li> <li>▪ Medicine</li> </ul>	<ul style="list-style-type: none"> <li>▪ Nursing</li> <li>▪ Psychology</li> <li>▪ Physics</li> <li>▪ Social Studies</li> </ul>
<b>Tier 2</b>	<ul style="list-style-type: none"> <li>▪ Architecture</li> <li>▪ Arts, Crafts and Design</li> <li>▪ Computer Science</li> </ul>	<ul style="list-style-type: none"> <li>▪ English</li> <li>▪ Languages</li> <li>▪ Maths</li> </ul>	<ul style="list-style-type: none"> <li>▪ Physical Sciences</li> <li>▪ Sport and Exercise Science</li> <li>▪ Veterinary Science</li> </ul>
<b>Tier 3</b>	<ul style="list-style-type: none"> <li>▪ Agriculture</li> <li>▪ Dance</li> <li>▪ Drama</li> </ul>	<ul style="list-style-type: none"> <li>▪ History</li> <li>▪ Media</li> <li>▪ Music</li> </ul>	<ul style="list-style-type: none"> <li>▪ Performing Arts</li> <li>▪ Teaching</li> </ul>

\*Subject to change until official inventory release, Jan 2023

# Next steps:

## Clearing inventory release timetable

Date	Event
Wed 18 Jan	<ul style="list-style-type: none"><li>▪ Webinar: 'Clearing release 2023: essential insights and inventory'</li><li>▪ Clearing inventory brochure release (general)</li><li>▪ Clearing inventory booking window opens</li></ul>
Wed 25 Jan	<ul style="list-style-type: none"><li>▪ Equal consideration deadline</li></ul>
Thurs 26 Jan	<ul style="list-style-type: none"><li>▪ Webinar: 'Choosing and optimising Clearing media'</li></ul>
Thurs 2 Feb	<ul style="list-style-type: none"><li>▪ Webinar: 'Preparing for Clearing success: expert panel Q&amp;A'</li></ul>
Mon 6 Feb	<ul style="list-style-type: none"><li>▪ Clearing inventory booking window closes</li></ul>
Mon 13 Feb	<ul style="list-style-type: none"><li>▪ Clearing inventory draw</li></ul>
Fri 17 Feb	<ul style="list-style-type: none"><li>▪ Last date for clients to be notified of Clearing inventory allocation</li></ul>

- Your feedback and comments are welcome as we finalise details of our Clearing packages in the coming weeks – please get in touch with your UCAS Customer Manager or email [educationservices@ucas.ac.uk](mailto:educationservices@ucas.ac.uk)

**Any questions?**





# Thank you

Any further questions or feedback, please get in touch with your UCAS Customer Manager, or email:

[educationservices@ucas.ac.uk](mailto:educationservices@ucas.ac.uk)

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