

CLEARING REPORT 2023

# TAKING CONTROL

CHOICE | EMPOWERMENT | PREFERENCE

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# INTRODUCTION

2023 was the busiest Clearing ever, and a record-breaking cycle for the number of 18 year olds finding a place at uni. We've seen new ways of using the service give rise to completely new types of users, and patterns emerging that give us unique insights into the motivations, wants, needs, and decision-making of today's Clearing applicant.

Cost of Living has played its part in this year's trends, and so too has a final settling of the behaviours we saw emerge during the pandemic. But more influential has been a growing sense of control and decision-making that speaks to personal preference – rather than simply finding a place.

Each vastly different group of Clearing users are united by one thing this year: empowerment. From the overachievers who find themselves with more choice than they expected, to those with no offers who refuse to simply settle for the first opportunity – control is the theme of 2023.

For degree providers this means increased scrutiny from students, as they look for the perfect place, and increased competition from other pathways, as they explore the idea that their perfect place may not even be university. For applicants, it means a better opportunity inside a system that allows them to build the future they want to live.

The 2023 UCAS Clearing survey was completed between August and October 2023 by a sample of 2023 cycle applicants who had gained a place at a university or college using Clearing. In total, over 6,000 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.

# CLEARING PAST & PRESENT





**Historically, Clearing was used by applicants who failed to meet the terms of their offers and needed to find an alternative course. There were other ways to use it – like for those who missed the deadline or who decided to apply to university late – but it was primarily a cherished second chance to find a place.**

In 2019, we made some improvements to Clearing that have since revolutionised the way that applicants use it. By enabling users to self-release into Clearing, rather than them solely being auto-released when not meeting offers, applicants became empowered to use Clearing as a tool to change their minds, change their plans, and seek better or more suitable outcomes.

In 2020, we introduced Clearing Plus – which algorithmically suggests courses and providers that might be a good fit for the applicant. This removes the pressure of searching through hundreds of options, by using what we know about applicants to recommend the best suited pathways for them.

And in 2022, in response to a new way of using Clearing, we retired UCAS Adjustment. Its function, allowing overachievers who got better grades than expected, was now a central part of the core Clearing function.

In 2023 we changed the deadline to add Clearing choices from 3pm to 1pm, meaning they didn't have to wait as long. We also added 'reason for confirmation pending' which increased transparency during a stressful time, and reduced extra calls to universities.

Today, Clearing is used by a vast range of applicants, more in number and more diverse than ever – reflective of the even greater opportunities it now presents.

# 2023 IN NUMBERS

In 2023, 74,990 students found a place using Clearing.

92%

OF PEOPLE PLACED THROUGH CLEARING  
WERE CONFIDENT THEY'D MADE THE  
RIGHT DECISION FOR THEM

59%

OF STUDENTS PLACED THROUGH  
CLEARING CONSIDERED IT AS AN  
OPTION BEFORE AUGUST

10%

OF APPLICANTS HAVE FOUND  
A PLACE IN CLEARING THIS YEAR  
(74,990 , +12% ON 2022)

39,620

A RECORD NUMBER OF UK 18 YEAR OLDS  
SECURED A PLACE USING CLEARING  
(+14% ON 2022)

38,590

PEOPLE USED DECLINE MY PLACE (DMP)  
THIS YEAR, A RECORD NUMBER  
(+38% ON 2019 WHEN 'DECLINE MY  
PLACE' WAS LAUNCHED)

**Top-line analysis of Clearing paints a number of interesting pictures about how the tool is being used and how it's changing.**

But far more interesting and useful for you are the opinions, thought processes, and decision-making of applicants over the whole Clearing period.

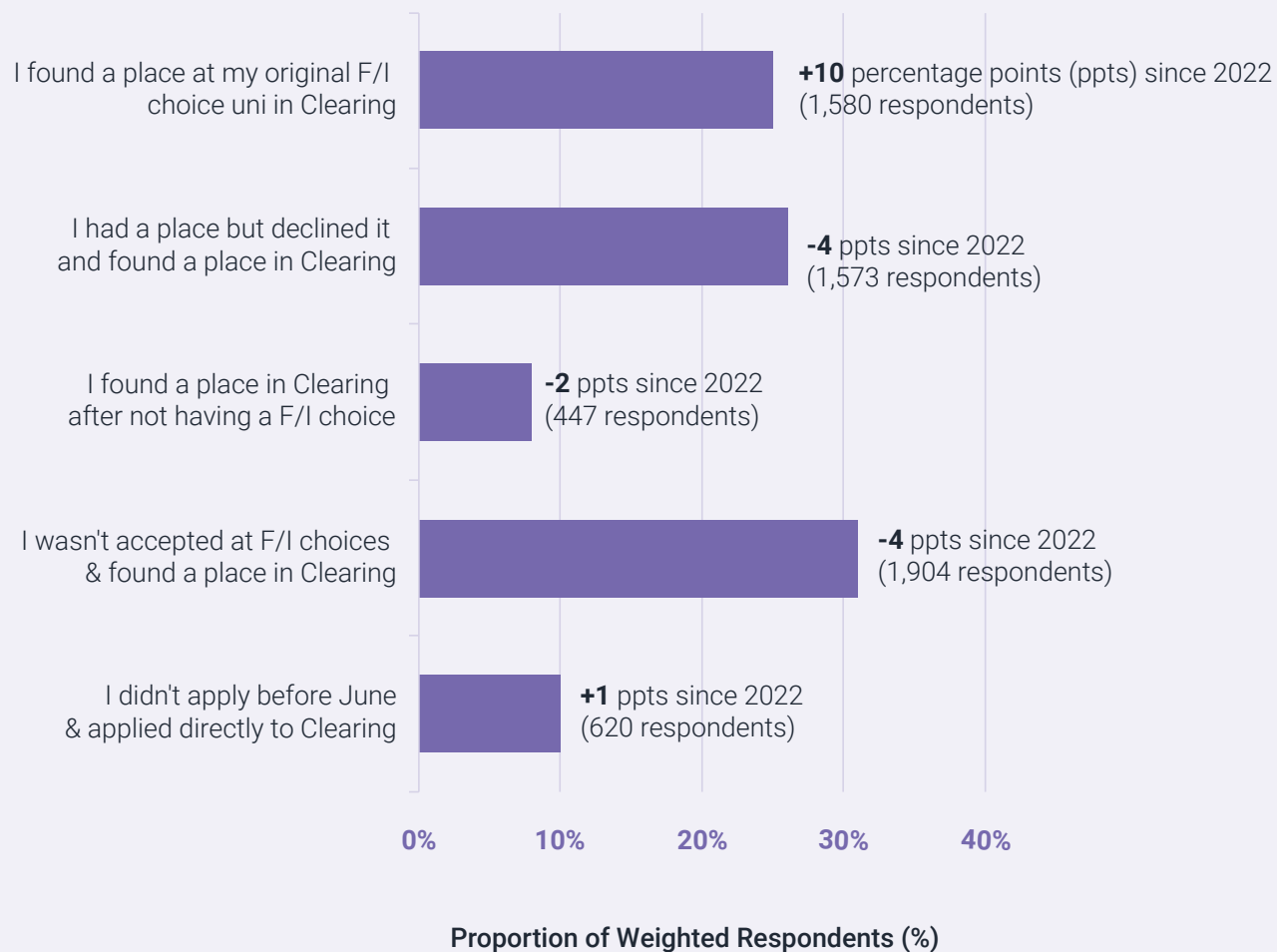
To understand the way applicants are thinking, we conducted a Clearing survey with more than 6,000 users – weighted to represent the almost 75,000-strong cohort this year.



**6,124** respondents



**74,992** weighted respondents



# DEMOGRAPHICS

Broken down by weighted proportion of respondents and number of responses:

## UK VS. INTERNATIONAL

<b>UK:</b> <b>95%</b> 5,990 responses	<b>International:</b> <b>5%</b> 134 responses
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## GENDER SPLIT

<b>Female:</b> <b>55%</b> 3,862 responses	<b>Male:</b> <b>45%</b> 2,262 responses
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## ETHNIC GROUPS

<b>Asian:</b> <b>26%</b> 1,348 responses	<b>Black:</b> <b>13%</b> 668 responses
<b>Mixed:</b> <b>7%</b> 351 responses	<b>White:</b> <b>45%</b> 3,349 responses
<b>Other:</b> <b>4%</b> 208 responses	<b>Unknown:</b> <b>6%</b> 200 responses

## POLAR4 QUINTILES (UK 18 YEAR OLDS)

<b>Quintile 1:</b> <b>11%</b> 395 responses	<b>Quintile 2:</b> <b>15%</b> 543 responses	<b>Quintile 3:</b> <b>19%</b> 658 responses
<b>Quintile 4:</b> <b>24%</b> 778 responses		<b>Quintile 5:</b> <b>31%</b> 994 responses

## AGE BANDS

<b>17 and under:</b> <b>1%</b> 48 responses	<b>18:</b> <b>57%</b> 3,569 responses	<b>19:</b> <b>17%</b> 867 responses
<b>20 to 24:</b> <b>16%</b> 850 responses	<b>25 to 39:</b> <b>7%</b> 535 responses	<b>40 and over:</b> <b>3%</b> 255 responses



## PLACED TARIFF SPLIT

<b>High Tariff:</b> <b>19%</b> 1,170 responses	<b>Medium Tariff:</b> <b>40%</b> 2,463 responses	<b>Low Tariff:</b> <b>40%</b> 2,491 responses
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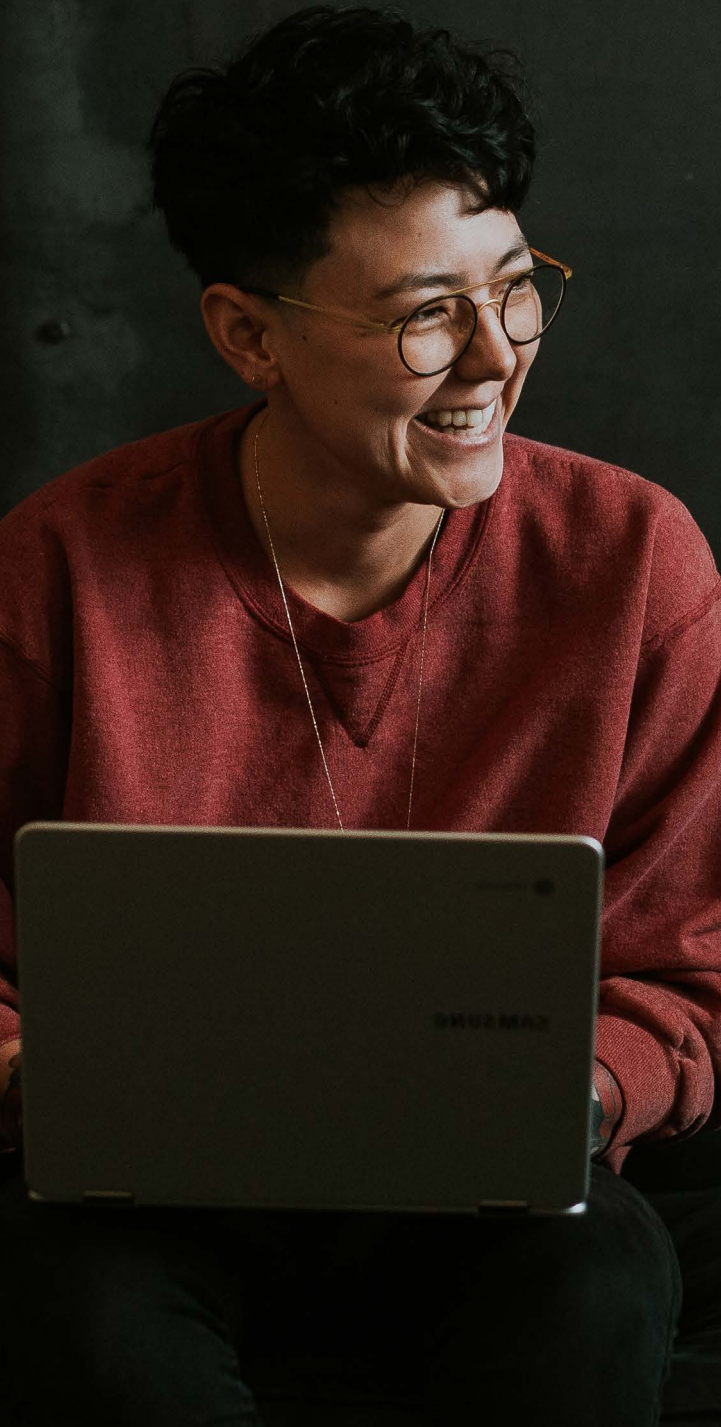
## SUBJECT GROUPS

<b>Subjects Allied to Medicine:</b> <b>14%</b> 925 responses	<b>Biological Sciences:</b> <b>12%</b> 759 responses	<b>Business &amp; Administrative Studies:</b> <b>11%</b> 625 responses	<b>Social Studies:</b> <b>8%</b> 519 responses
<b>Computer Science:</b> <b>8%</b> 391 responses	<b>Law:</b> <b>6%</b> 391 responses	<b>Engineering:</b> <b>6%</b> 317 responses	<b>Creative Arts &amp; Design:</b> <b>5%</b> 358 responses
<b>Physical Sciences:</b> <b>4%</b> 238 responses	<b>Historical and Philosophical Studies:</b> <b>3%</b> 177 responses	<b>Medicine and Dentistry:</b> <b>3%</b> 161 responses	<b>Education:</b> <b>2%</b> 156 responses

Broken down by weighted proportion of respondents and number of responses

## Clearing Personas





# THE FIVE TYPES OF CLEARING USER

Last year, we introduced the three emerging types of Clearing users. Fuelled by the system changes in 2019, these savvy applicants were finding new ways to use Clearing to their advantage. This year, the data has revealed five types:

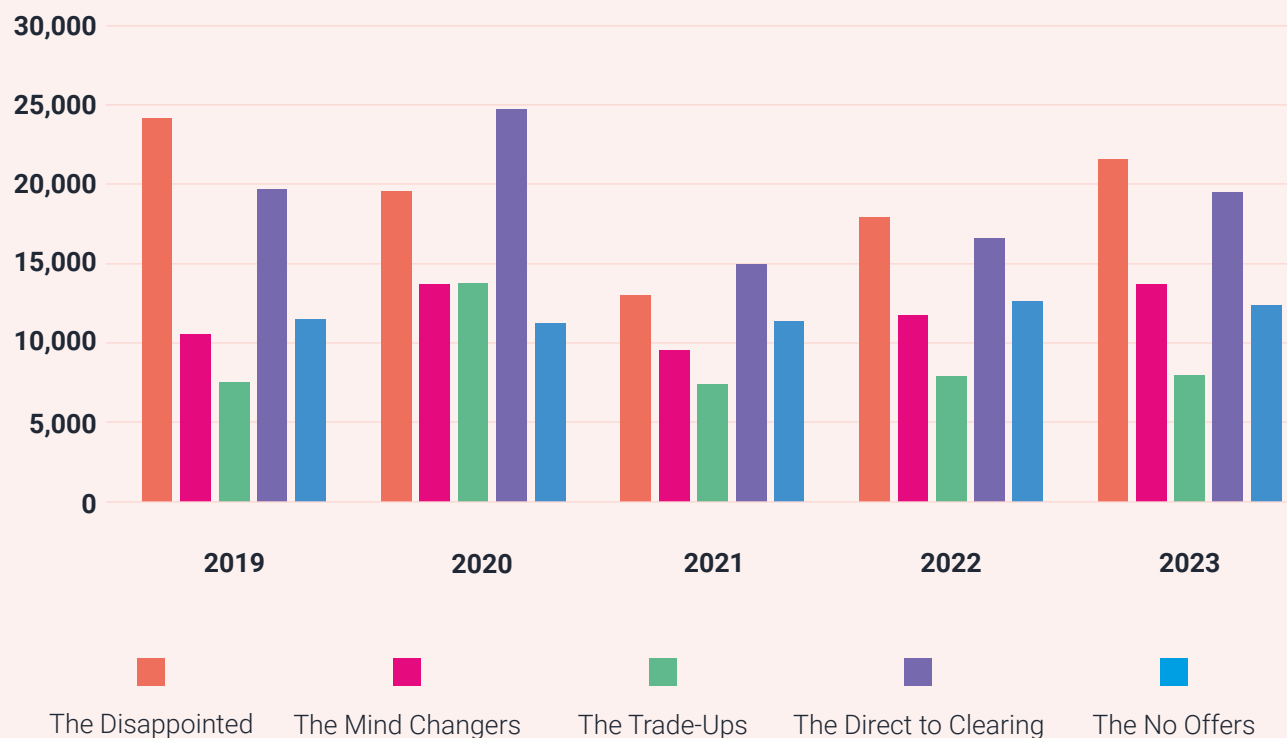
**In 2023, 74,990 students found a place using Clearing.**

- ▶ 21,620 (29%) found a place after declining their original firm choice – the largest single pool (+10% vs 2022)
- ▶ Within this group, 7,930 traded up (+1%), while 13,690 were mind-changers (+16%)
- ▶ 10,020 released from their firm choice (+6%) and 7,930 released from their insurance (+12%)
- ▶ 21,560 (29%) found a place after not meeting the terms of their offer and being released into Clearing (+20%)
- ▶ 19,475 (26%) applied directly into Clearing (+17%)
- ▶ 12,340 (16%) held no offers going into Clearing (-3%)

**Within this data are personas:**

- ▶ **The Disappointed**
- ▶ **The Mind Changers**
- ▶ **The Trade-Ups**
- ▶ **The Direct to Clearing**
- ▶ **The No Offers**

Clearing Pools





# 'THE DISAPPOINTED ON RESULTS DAY'

**When you think of Clearing, you typically think of these users – applicants who didn't achieve the grades to meet their offers in the main scheme, and are therefore available on Results Day to be placed via Clearing. In 2019, this group was preeminent – the common way to use Clearing. In 2023, there were 21,560 applicants in this group, which is 29% of the overall Clearing users, and +20% vs 2022.**

**This is the group most surprised to be using Clearing. Before May, just 13% thought Clearing might be an option they would take, which is why almost three quarters (71%) end up needing to research how Clearing actually works. No surprise then, that this group experiences feelings of stress (63%), nerves (53%), and frustration (44%) – because of all five groups, this is the least confident they've made the right choice.**

With this uncertainty comes a raft of concerns: mainly regarding the likelihood of being accepted based on their grades (89%), and about the availability of university accommodation (73%) – they're worried the best picks will all be gone. No other group is more concerned about these two things. If 'The Disappointed' feel they've been shuffled to the bottom of the pack, they will naturally feel

that their options are going to be limited by the time they find a place.

When it comes to influence, it comes most from their friends and family (24%). When it comes to support, their parents are the first people they talk to after hearing they're in Clearing, and the most common source of support (41%). They're also the highest users of UCAS Course Search (21%), and big users of university/college websites (46%), Clearing Plus (20%), and UCAS search (42%). This is the group most likely to have first discovered the uni they placed at in Clearing via UCAS.com.

**This is a group characterised by their needs – they're surprised to find themselves in this position and they're looking for advice, guidance, and the right way forward.**

## 2023 NUMBERS

21,560

29% of total placed in Clearing +20% vs 2022

## WHEN DO THEY MAKE DECISIONS?



Just **13%** thought Clearing might be an option they would take **before May**



**63%** had **already** researched the uni they ended up at in Clearing when they originally made their **5 choices**

## WHAT ARE THEIR FEELINGS AROUND CLEARING?

53%

nervous

45%

felt very confident they had made the right choice for them

Lowest of any persona

44%

frustrated

63%

stressed



### WHAT WAS IMPORTANT TO THEM OVERALL?\*

<b>89%</b> Chance of being accepted, based on their grades	<b>73%</b> Availability of university accommodation
Highest of any persona	Highest of any persona

### WHAT INFORMATION DO THEY SEEK OUT?\*

<b>71%</b> How Clearing works	<b>9%</b> didn't look for information before Clearing	<b>85%</b> called universities direct to discuss Clearing
	Highest of any persona	Highest of any persona

### WHO ARE THEIR KEY INFLUENCERS? \*\*

<b>24%</b> Friends & family	<b>21%</b> UCAS Course Search		
When they found out they would be in Clearing they spoke to:			
<b>Parent</b> <b>41%</b>	<b>Teacher</b> <b>16%</b>	<b>Friend</b> <b>12%</b>	<b>Uni</b> <b>11%</b>

### WHICH RESOURCES DO THEY USE?

<b>46%</b> University/College websites	<b>42%</b> UCAS.com search	<b>20%</b> Clearing Plus
2nd highest (after the Mind Changers)		Highest of any persona

### WHAT ARE THEIR KEY LIFESTYLE CONSIDERATIONS?\*

Distance / travel	Life on campus	Support available
<b>58%</b> Distance from where they live currently	<b>71%</b> Cost of living	<b>61%</b> Mental health support
Lowest of any persona		Lowest of any persona

\* These are the factors that stand out for this persona.

\*\* These are the sources where this persona first heard about the uni where they eventually placed at through Clearing.

# 'THE MIND CHANGERS'

Only in existence since 2019, 'The Mind Changers' are those who have deliberately changed where or what subject they will study. In 2023, there were **13,690 applicants in this group, which is 18% of the overall Clearing users, and +16% vs 2022.**

**This is the autonomous group, empowered to take control of their choices outside of the traditional system. 15% thought about applying somewhere else before May and, from August, 60% commit to doing so – this is the mind-changing window, and the best time for providers to speak to them.**

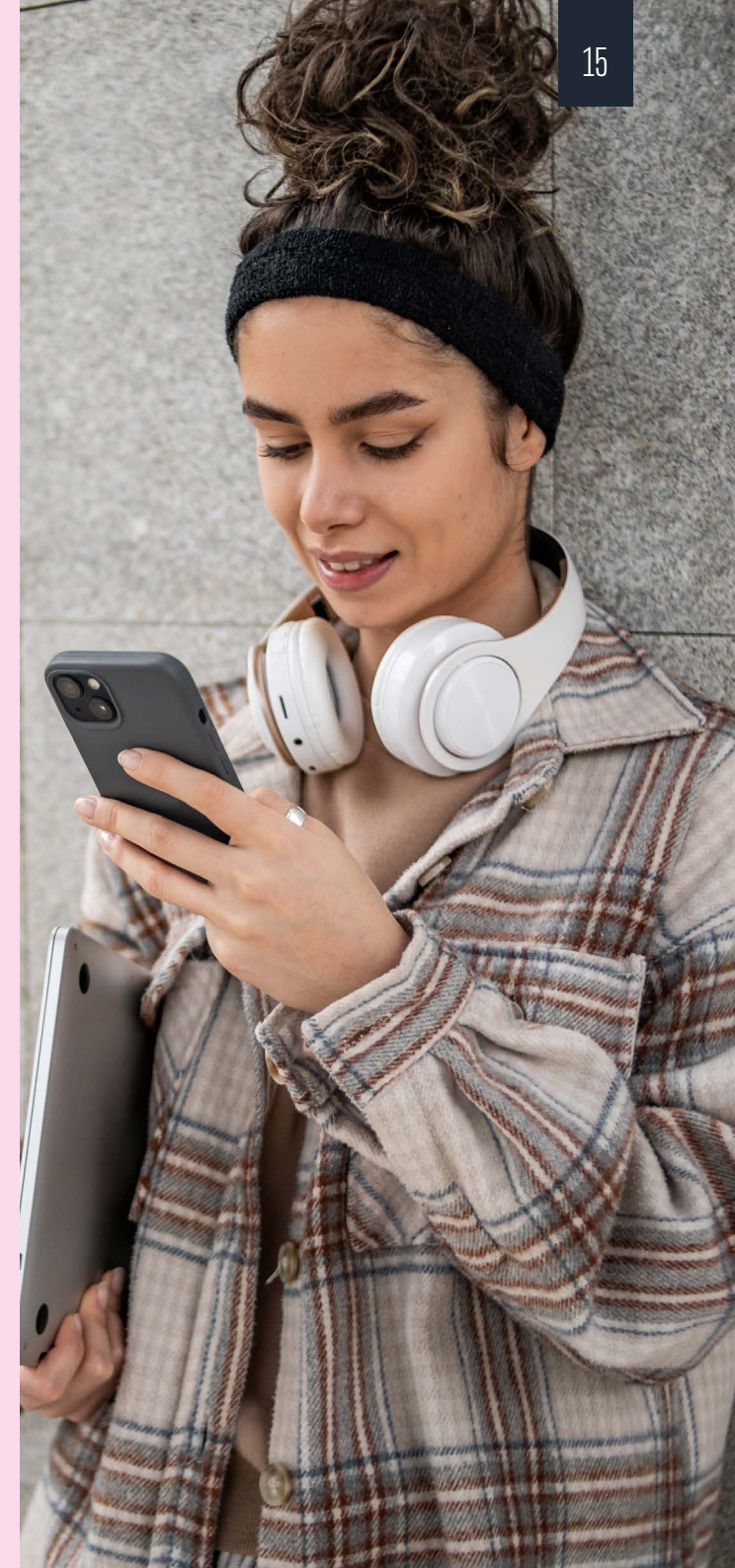
This sense of control inspires feelings of confidence, with 53% describing themselves as 'very confident' they'd made the right decision, and 87% describing their experience of Clearing as excellent or good.

Their concerns are practical and ambitious – not really concerns at all. 86% say the range of modules or courses are important to them, and another 81% say graduate prospects – they're ambitious, career focused, and driven. They're also looking for diversity on campus (59%) and mental health support (64%). Their only real worry is universal – the cost of living.

The Mind Changers are influenced most by their friends and family (29%) and the least by UCAS Course Search (17%). This speaks to a very personal decision-making process, one where they assess their own needs and wants rather than simply choosing from what's available.

And similarly to their practical concerns, their information needs are functional too – from how Clearing works (72%) to local provider info (24%) – with half of the whole group looking for this data directly on university websites (the highest of any persona) and UCAS search.

**This is a group characterised by empowerment, research, and control of their own destiny. They are using Clearing to redirect their journey and find something more suited to their current preferences.**





## 2023 NUMBERS

**13,690**

**18%** of total placed in Clearing  
**+16%** vs 2022

## WHEN DO THEY MAKE DECISIONS?



**15%** thought about applying somewhere else **before May**  
(later consideration than the Trade-Ups)



**60%** decided to apply somewhere else **from August onwards**  
(later consideration than the Trade-Ups)

## WHAT ARE THEIR FEELINGS AROUND CLEARING?

**87%**

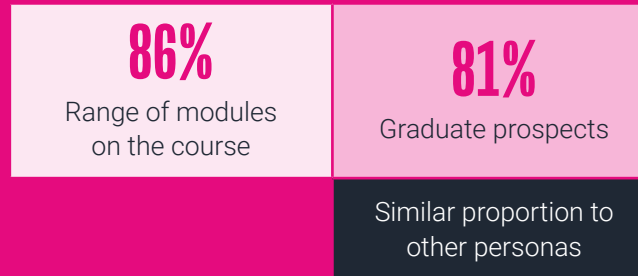
described their experience of Clearing as **'Excellent'** or **'Good'**

**53%**

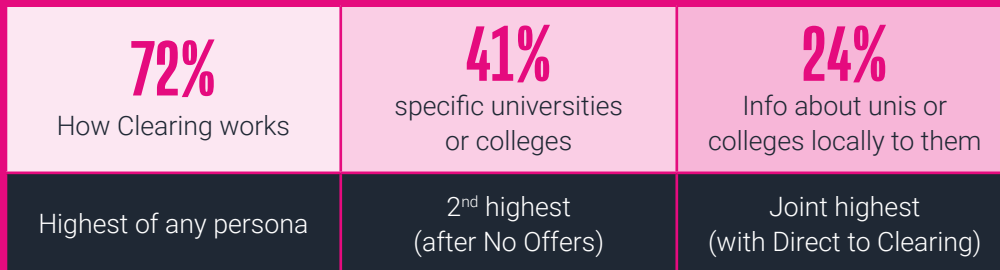
felt **very confident** they had made the right choice for them



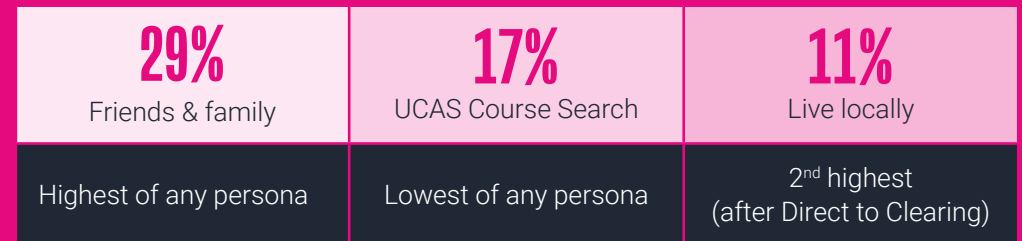
### WHAT WAS IMPORTANT TO THEM OVERALL?\*



### WHAT INFORMATION DO THEY SEEK OUT?\*



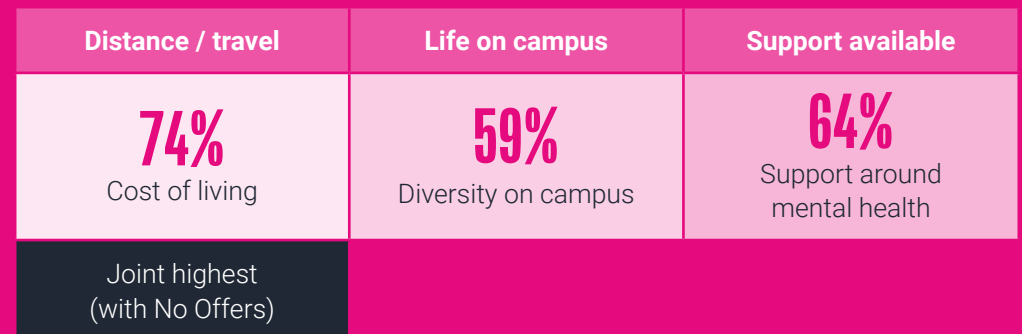
### WHO ARE THEIR KEY INFLUENCERS?\*\*\*



### WHICH RESOURCES DO THEY USE?\*



### WHAT ARE THEIR KEY LIFESTYLE CONSIDERATIONS?\*



\* These are the factors that stand out for this persona.

\*\* These are the sources where this persona first heard about the uni where they eventually placed at through Clearing.



# 'THE TRADE-UPS'

**The more ambitious and overachieving cousins of 'The Mind Changers' – these users change where or what they study based on getting higher grades than expected. In 2023, there were 7,930 applicants in this group, which is 11% of the overall Clearing users, and +1% vs 2022.**

**Despite their decision being driven by their results, more of this group actually considered applying elsewhere by May (17%) than The Mind Changers. They might be surprised by their overachievement, but plenty of them had a plan in case it happened. 53% of Trade-Ups decide to apply elsewhere from August.**

So it comes as no surprise that 60% felt very confident in their decision, and 86% describe their experience of Clearing as being good or excellent. Through overachievement, they've enabled their own empowerment.

The Trade-Ups take their ambitious nature into their key considerations and information needs, looking to carve out the perfect scenario that reflects their own achievements. Graduate earnings (85%) and league table position (69%) are what's most important to them, and from a lifestyle perspective they're seeking a well-located campus (80%), incentives (57%) like bursaries, and a diverse campus (65%). No other group focuses on diversity more – The Trade-Ups are utilising their additional options to find campus cultures that suit them best. Equipped with more choice than they expected, they're exercising it.

This group had a varied group of influencers – ranging from friends and family (26%) and teachers and advisers (11%) to the UCAS Course Search (21%). With more choice, they seek more diverse support – this group uses social media as a resource for researching unis more than any other, and their platforms of choice are TikTok, Instagram and YouTube (in that order). Similarly to The Mind Changers, they're on the hunt for practical information to inform their opportunities – course availability (67%), when Clearing opens (51%), and which unis offer remote learning (9%) – they're open to study in any way they can, and are flexible in a way that other personas are not.

**This is a group characterised by choice. They're empowered overachievers – able to pick and choose from courses they didn't expect to have access to. Now, they search for the perfect course and provider.**

## 2023 NUMBERS

7,920

11% of total placed in Clearing  
+1% vs 2022

## WHEN DO THEY MAKE DECISIONS?



17% thought about applying somewhere else **before May** (earlier consideration than the Mind Changers)



53% decided to apply somewhere else from **August onwards** (earlier decision-making than the Mind Changers)

## WHAT ARE THEIR FEELINGS AROUND CLEARING?

86%

described their experience of Clearing as '**Excellent**' or '**Good**'

60%

felt **very confident** they had made the right choice for them



### WHAT WAS IMPORTANT TO THEM OVERALL?\*

<b>85%</b> Likely earnings after graduation	<b>69%</b> The uni's position in the league tables
Highest of any persona	Highest of any persona

### WHAT INFORMATION DO THEY SEEK OUT?\*

<b>67%</b> Course availability	<b>51%</b> When Clearing opens	<b>9%</b> Which unis offer remote learning
2nd highest (after the Mind Changers)		Highest of any persona

### WHO ARE THEIR KEY INFLUENCERS?\*\*\*

<b>26%</b> Friends & family	<b>21%</b> UCAS Course Search	<b>11%</b> Live locally
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### WHICH RESOURCES DO THEY USE?\*

<b>44%</b> University/College websites	<b>39%</b> UCAS.com search	<b>13%</b> Social media
		Highest of any persona. Platforms of choice are: Tik-Tok, Instagram & YouTube

### WHAT ARE THEIR KEY LIFESTYLE CONSIDERATIONS?\*

Distance / travel	Life on campus	Support available
<b>80%</b> Location of the university	<b>65%</b> Diversity on campus	<b>57%</b> Incentives of offer (e.g. bursary)
Highest of any persona	Highest of any persona	Highest of any persona

\* These are the factors that stand out for this persona.

\*\* These are the sources where this persona first heard about the uni where they eventually placed at through Clearing.

# 'THE DIRECT TO CLEARING'

**There has always been a healthy minority of applicants who apply directly into Clearing, usually mature applicants. This group is often making late decisions in response to personal circumstances, the job market, or in an effort to hedge their bets. In 2023, there were 19,475 applicants in this group, which is 26% of the overall Clearing users, and +17% vs 2022.**

**Of this group of varied demographics and motivations – 28% were waiting to see if their personal circumstances would allow them to apply to uni, 23% were already at uni but dropped out to apply directly, and 8% were nervous their results wouldn't be good enough.**

Despite a last-minute appearance, this waiting game and personal flexibility actually makes this group the single most confident and satisfied group of all. 91% describe their Clearing experience as good or excellent, and 64% were very confident this was the right choice for them.

Money is a big driver for this group, with 62% concerned about tuition fees, 75% about commuting costs, and 79% about what financial support is available. No other group is more focused on money than this group – neither is any other group more interested in sustainability on campus (59%) or mental health support (71%).

This is also the group most likely to be influenced by the fact that they live locally (16%), and to have contacted the university directly (16%). Coupled with the fact that, among all other Clearing applicants, the 'Direct to Clearing' group is actually least interested in Clearing itself (they're the least likely to seek information about how it works or when it opens) – the flexibility and late decisions of this group are hyper-focused on convenience. If their personal circumstances line up and they can afford it, they'll apply. If they don't and they can't, they won't.

**This is a group characterised by convenience. Everything has to be just right for this group to enter Clearing, if they assess it as a route that could fit in and around their existing lifestyles.**



## 2023 NUMBERS

19,475

26% of total placed in Clearing  
+17% vs 2022

## WHEN DO THEY MAKE DECISIONS?



28% waited to see if their **personal circumstances** would allow them to apply to uni



8% were nervous their results wouldn't be good enough



23% were **already at uni**, but dropped out to apply direct

## WHAT ARE THEIR FEELINGS AROUND CLEARING?

91%

described their experience of Clearing as '**Excellent**' or '**Good**'

Highest of any persona

64%

felt **very confident** they had made the right choice for them

Highest of any persona

### WHAT MOTIVATES THEM OVERALL?\*

<b>63%</b> Staff they spoke to at the university	<b>62%</b> The cost of tuition fees
Highest of any persona	Highest of any persona

### WHAT INFORMATION DO THEY SEEK OUT?\*

<b>66%</b> How Clearing works	<b>46%</b> When Clearing opens	<b>24%</b> Info about unis or colleges locally to them
Lowest of any persona	Lowest of any persona	Joint highest (with Mind Changers)

### WHO ARE THEIR KEY INFLUENCERS? \*\*

<b>28%</b> Friends & family	<b>20%</b> UCAS Course Search	<b>16%</b> Live locally
2 <sup>nd</sup> highest (after the Mind Changers)		Highest of any persona

### WHICH RESOURCES DO THEY USE?\*

<b>45%</b> University/College websites	<b>39%</b> UCAS.com search	<b>16%</b> Contact the uni direct
	Lowest of any persona	Highest of any persona

### WHAT ARE THEIR KEY LIFESTYLE CONSIDERATIONS?\*

Distance / travel	Life on campus	Support available
<b>75%</b> Cost of travel between home & university	<b>59%</b> Sustainability on campus	<b>79%</b> Financial
Highest of any persona	Highest of any persona	<b>71%</b> Mental health
		Both are highest of any persona

\* These are the factors that stand out for this persona.

\*\* These are the sources where this persona first heard about the uni where they eventually placed at through Clearing.



# ‘THE NO OFFERS’

**This group had no offers – purposefully or otherwise – therefore went into Clearing with the intention of securing a place at university outside of the Main Scheme route. In 2023, there were 12,340 applicants in this group, which is 16% of the overall Clearing users, and -3% vs 2022.**

**This is the group considering Clearing earlier than any, with 24% thinking of it before May. 65% had already researched their eventual university back when they made their original five choices – suggesting they’re still keen to attend them, via any route they can find.**

With Clearing as their second chance in this cycle, this is a group grateful for another opportunity – 86% described their experience as good or excellent, and more than half were very confident it was the right decision.

You may be surprised to hear that, even for a group with fewer options than most, their motivations and considerations are far from simple. They are the most concerned about finding an option with quality teaching (91%) of any group, and the most interested in finding a university which would allow them to study remotely (36%). This flexibility and necessity is key – if they haven’t had any offers, but are set on a certain subject or characteristic like quality teaching, they will go remote. Money matters too – 60% are concerned about tuition fees, 74% want to know the cost of campus living (the highest of any persona), and 72% are looking for financial support. Only the ‘Direct to Clearing’ group are more cost-conscious.

Their information needs are similarly practical – looking for content on how Clearing works (71%), when it opens (54%), and for information on specific universities and colleges (41% – the highest of any group). A fifth (20%) are influenced by UCAS Course Search, but perhaps because of the lack of choice and control compared to their fellow applicants, many seek support from their peers (17% turn to The Student Room, and 9% turn to social media – both the highest of any groups).

**This is a group characterised by necessity, with no other options for application remaining in this cycle, but not by desperation. They still search for the right providers, with the right provisions, to give them the university experience they want. Of all the groups in Clearing, they are likely the most prepared for the experience, with clear goals and info gathered ready.**



## 2023 NUMBERS

12,340

16% of total placed in Clearing  
-3% vs 2022

## WHEN DO THEY MAKE DECISIONS?



24% first thought Clearing would be an option for them **before May** (earliest consideration of Clearing by any persona)



65% had **already researched** the uni they ended up placing at in Clearing back when they made their original **5 Choices**

## WHAT ARE THEIR FEELINGS AROUND CLEARING?

86%

described their experience of Clearing as '**Excellent**' or '**Good**'

53%

felt **very confident** they had made the right choice for them



### WHAT MOTIVATES THEM OVERALL?\*

<b>91%</b> Quality of the teaching	<b>60%</b> The cost of tuition fees
	2 <sup>nd</sup> highest of any persona (after Direct to Clearing)

### WHAT INFORMATION DO THEY SEEK OUT?\*

<b>71%</b> How Clearing works	<b>54%</b> When Clearing opens	<b>41%</b> Info about specific unis or colleges
2 <sup>nd</sup> highest (after Mind Changers)	Highest of any persona	Highest of any persona

### WHO ARE THEIR KEY INFLUENCERS?\*\*\*

<b>22%</b> UCAS Course Search	<b>20%</b> Friends & family	<b>12%</b> Teachers & advisers
Highest of any persona	Lowest of any persona	Highest of any persona

### WHICH RESOURCES DO THEY USE?\*

<b>42%</b> University/College websites	<b>42%</b> UCAS.com search	<b>17%</b> The Student Room
Lowest of any persona	Highest of any persona	Highest of any persona

### WHAT ARE THEIR KEY LIFESTYLE CONSIDERATIONS?\*

Distance / travel	Life on campus	Support available
<b>36%</b> Option to study remotely	<b>74%</b> Cost of living	<b>72%</b> Financial support available
Highest of any persona	Highest of any persona	

\* These are the factors that stand out for this persona.

\*\* These are the sources where this persona first heard about the uni where they eventually placed at through Clearing.

# **THEMES & NEEDS**

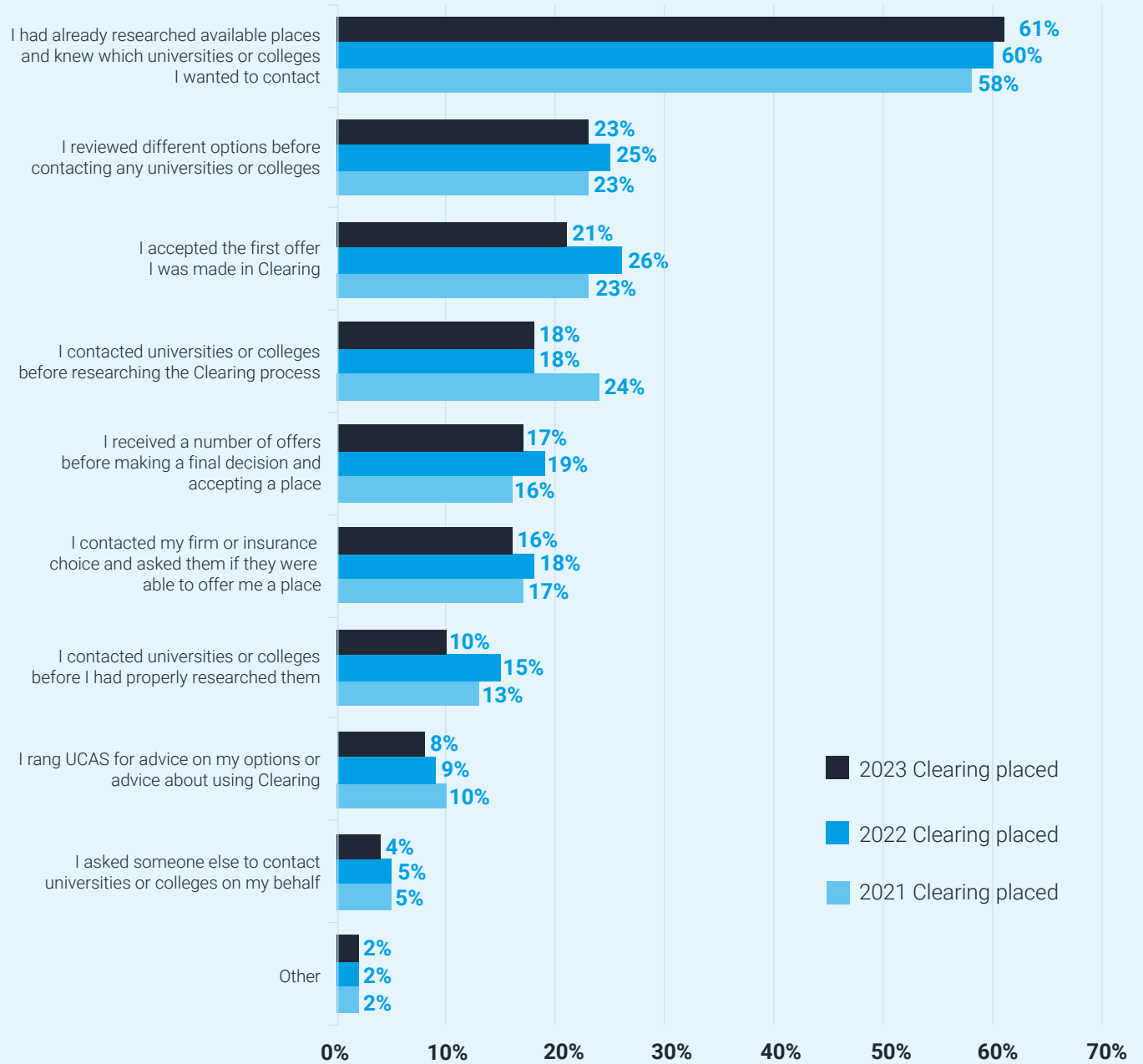


### Applicants were much more informed this year.

Almost two-thirds (61%) now know who they want to contact as soon as Clearing opens, a proportion which has risen for two years in a row.

We've also seen fewer applicants contacting universities before they've properly researched them, showing a greater sense of awareness and patience. And the number of applicants who accept the first offer they're made in Clearing has fallen 5 percentage points (ppts) from last year – the lowest number in three years.

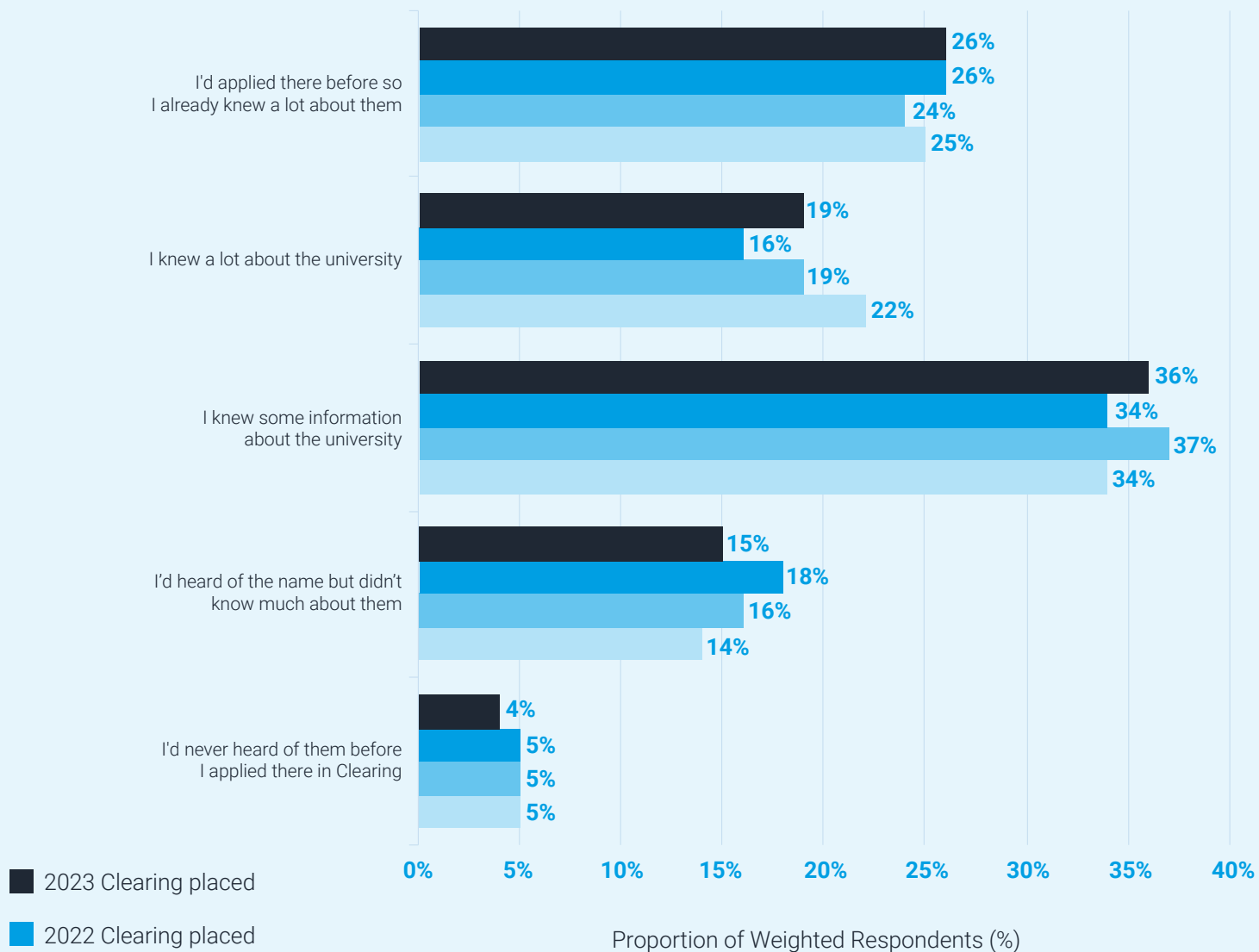
Q. Which of the following statements describe how you used Clearing? Please select all that apply.



**A quarter had already applied to the university previously so had a good level of knowledge.**

**A quarter had already applied to the university they pursued in Clearing.**

Students aren't giving up on their original plans just because they've found themselves in Clearing. 26% apply to a university they'd already applied to – the highest rate in four years.



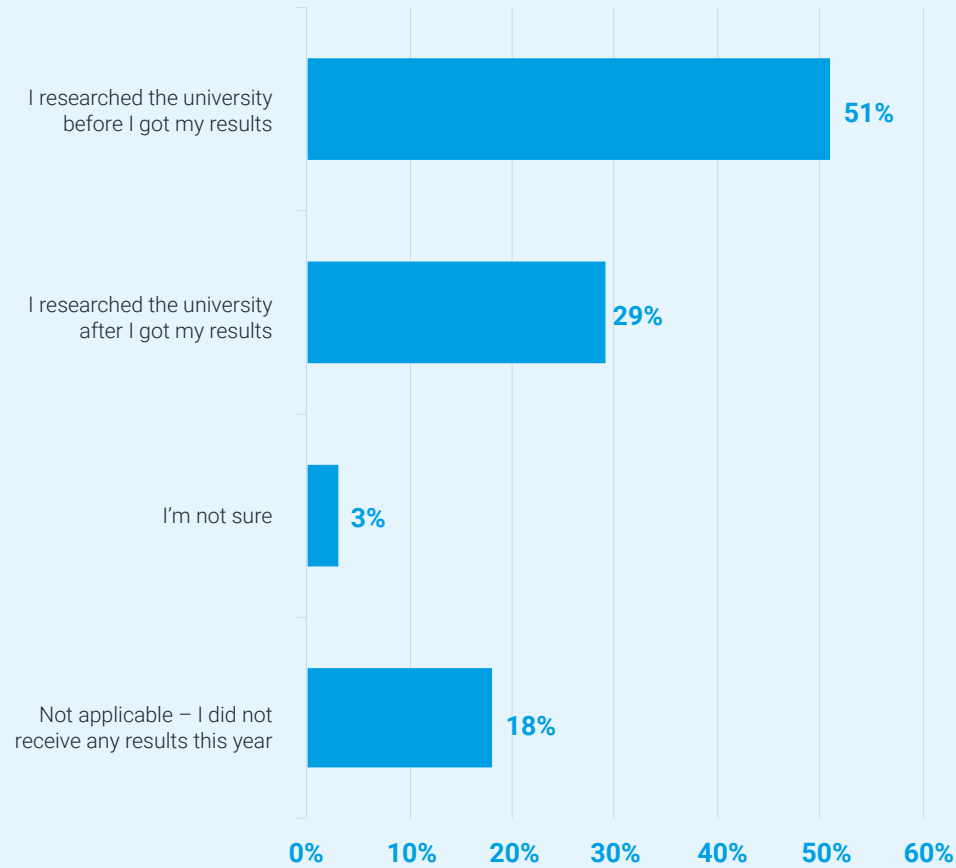
**Q.** Thinking about the university or college you were placed at through Clearing, how much do you feel you knew about them before applying to them through Clearing?

**And most researched it before they got their results.**

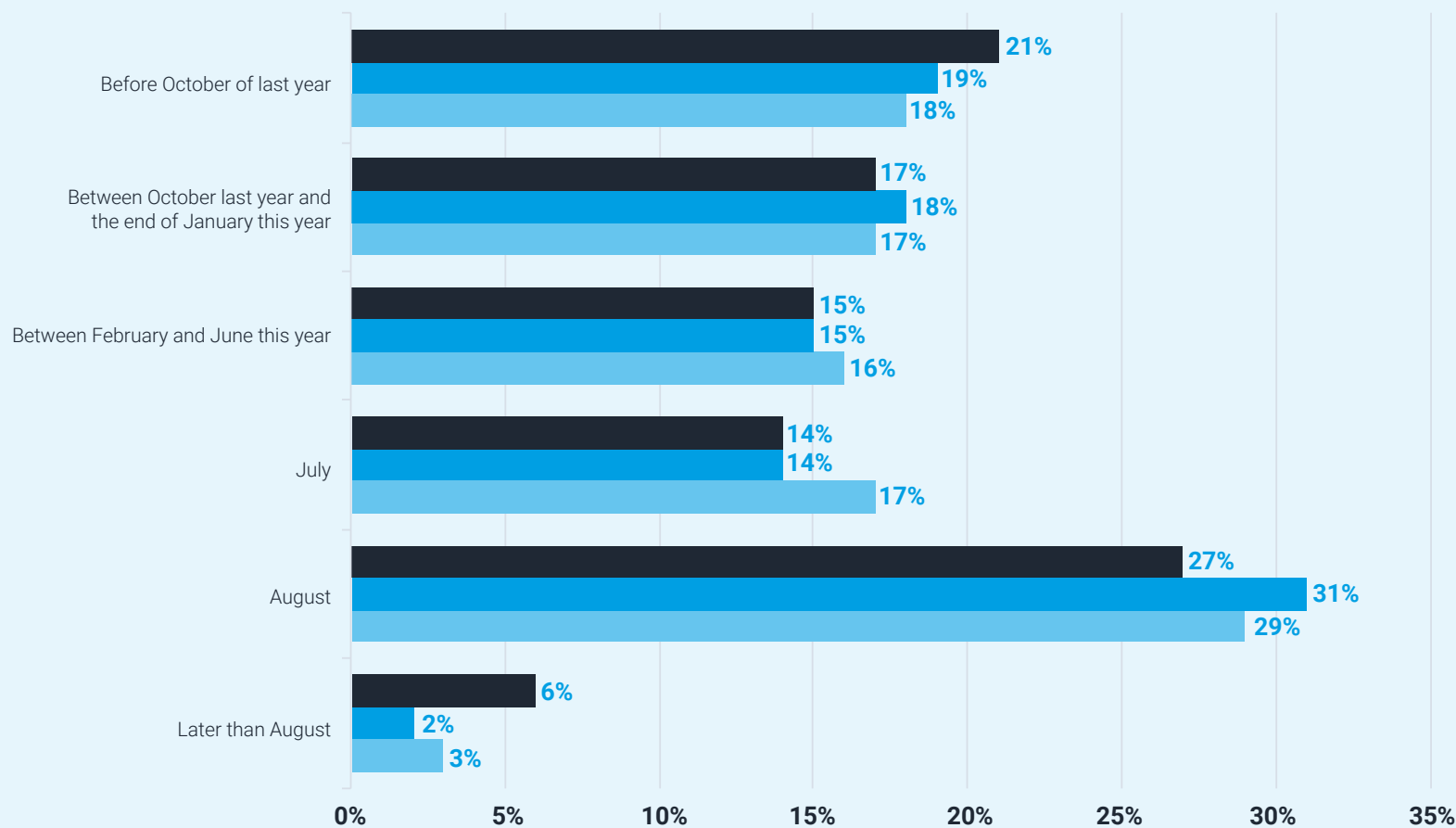
Of those that were waiting for results, 62% were prepared early in the cycle and stuck by their intentions, with another 35% identifying their target once they'd got their grades.

**Q. Did you research the university or college you were placed at through Clearing before or after you received your results?**

- ▶ No. respondents: 6,124
- ▶ Weighted no. respondents: 74,992



### Again we're seeing a shift to earlier research this year, with one in five researching the university/college they are placed at before October of the previous year



Proportion of Weighted Respondents (%)

- 2023 Clearing placed
- 2022 Clearing placed
- 2021 Clearing placed

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

### Applicants are researching earlier than ever.

This is part of a wider trend of preparedness and decisiveness. More applicants than ever are researching their university before October, and fewer than ever are waiting until July or August.

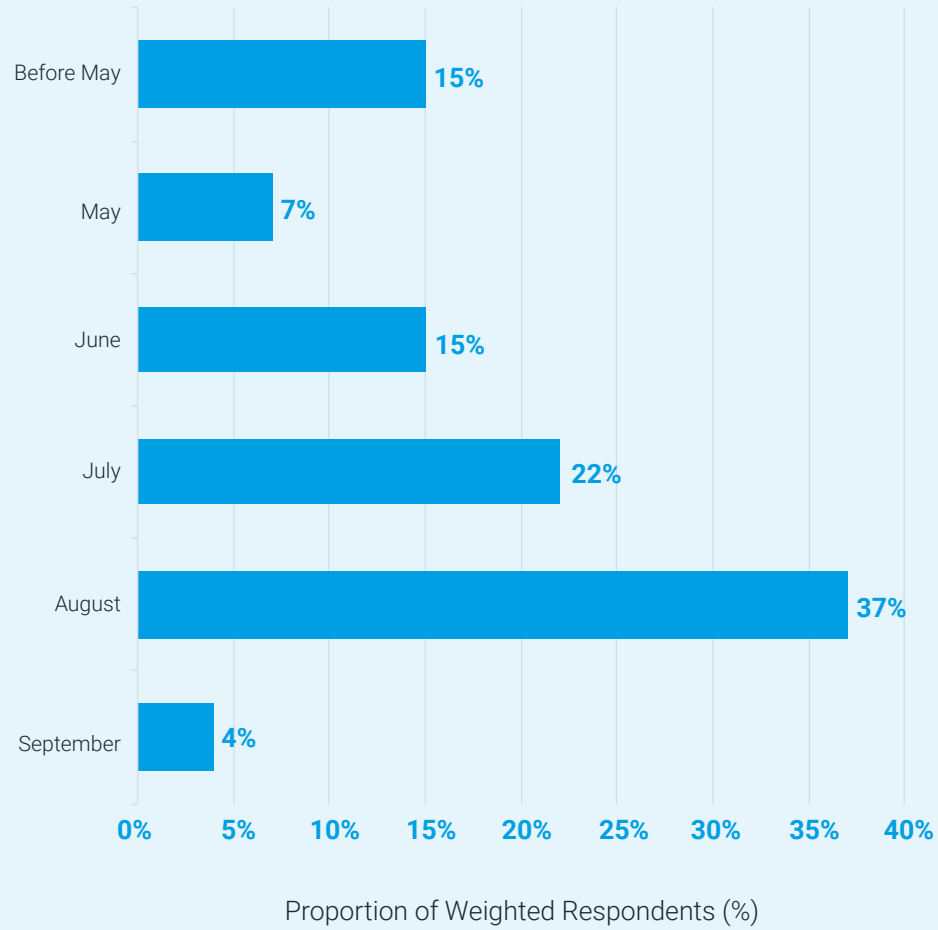
(We are also seeing more last-minute researchers too, which is likely because we saw more 'Direct to Clearing' users this year.)

**59% of students placed through Clearing considered it as an option before August.**

More applicants now consider Clearing before Results Day than those who don't.

With the thinking around Clearing changing, this could be a growing appreciation of the service's potential to **better** their offers.

**Q. When did you first think Clearing might be an option for your route to university or college?**

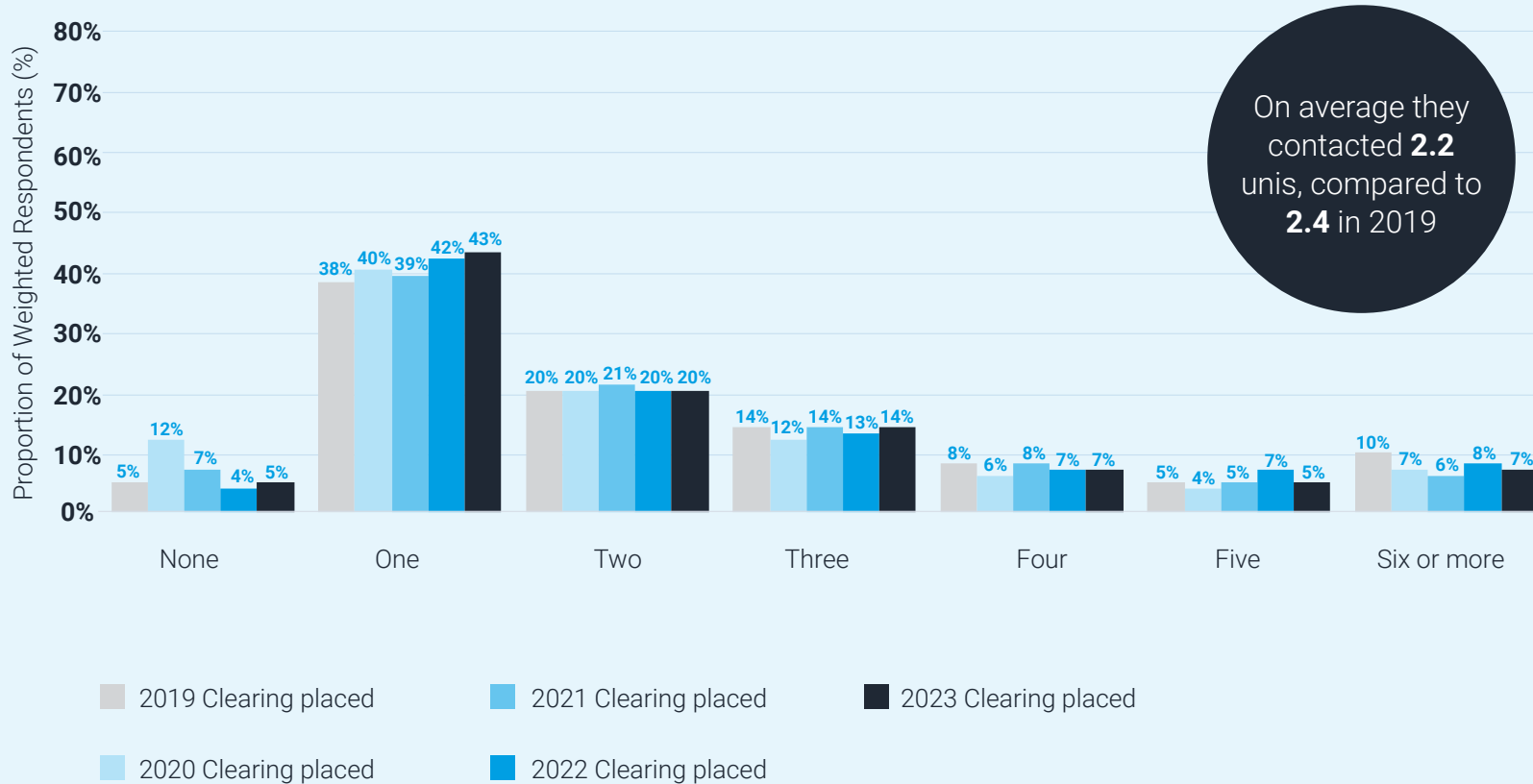




**Clearing usage is more targeted and more intentional.**

With the largest number of respondents contacting just one university this year, coupled with their earlier research and intentional usage, Clearing is being used in a more and more targeted way.

**Q. How many universities or colleges... did you contact about courses in Clearing?**

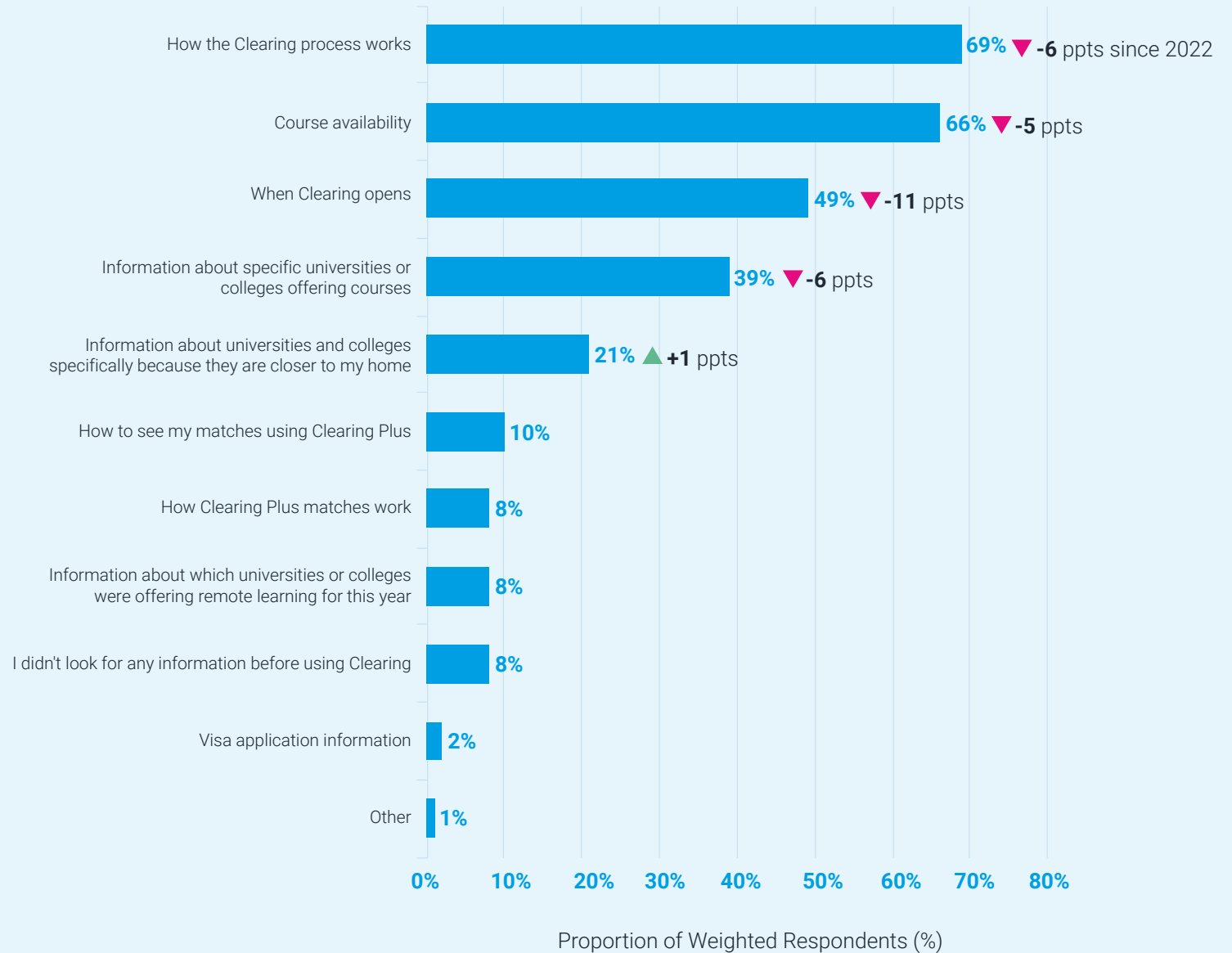


**Over three in five are actively looking for Clearing information about the process and course availability.**

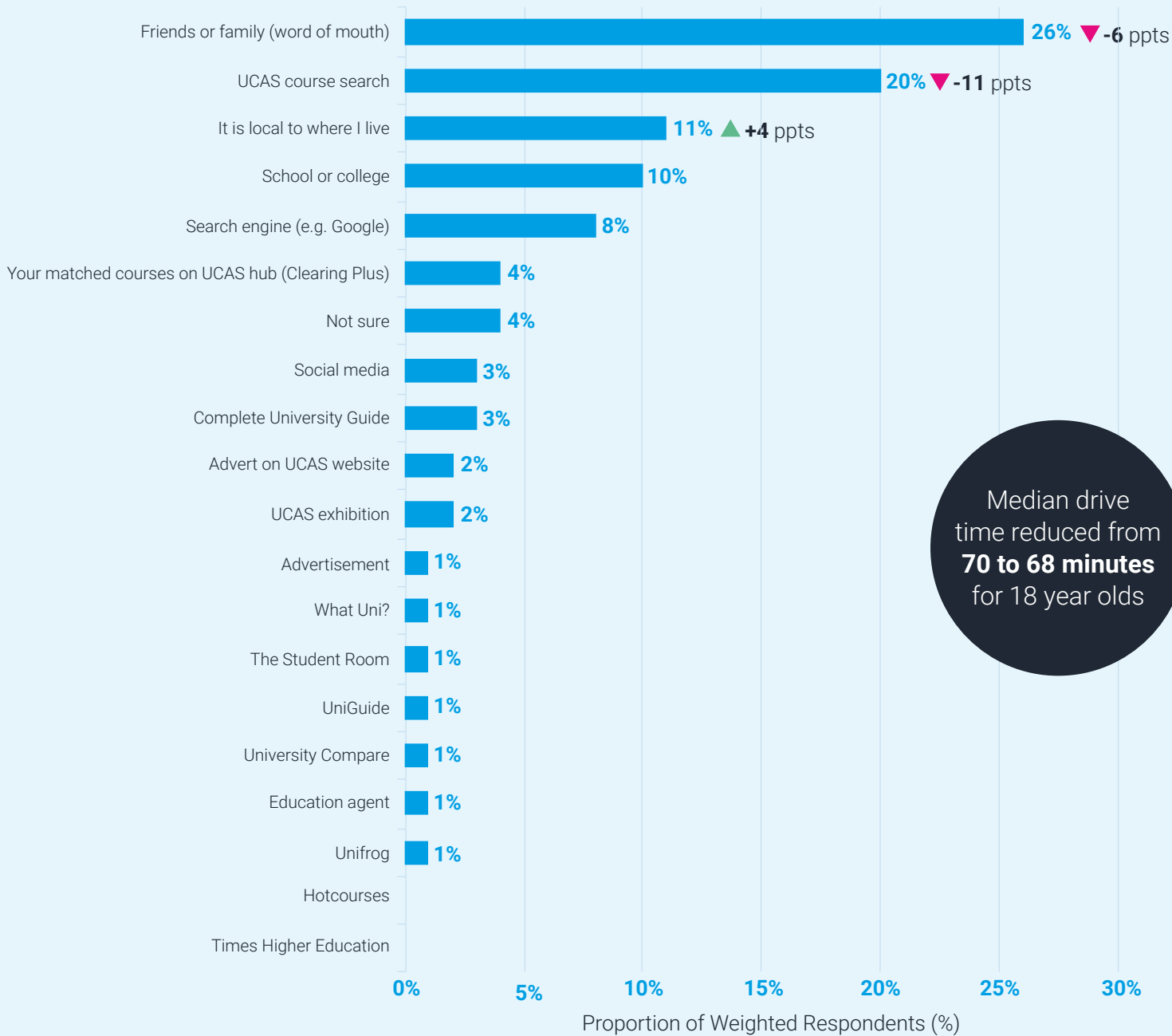
Awareness of when Clearing opens and how it works is growing, as more applicants use it and find new ways of making it work for them.

Course availability is what matters most – it’s the most popular research topic outside of how Clearing works.

**Q. What information did you look for about Clearing before you used the Clearing service? Please select all that apply.**



### Word of mouth is responsible for a quarter of Clearing placements



Median drive time reduced from **70 to 68 minutes** for 18 year olds

**Word of mouth is responsible for more placements than anything else.**

Friends and family are still the greatest influencers when it comes to Clearing users finding their eventual placement.

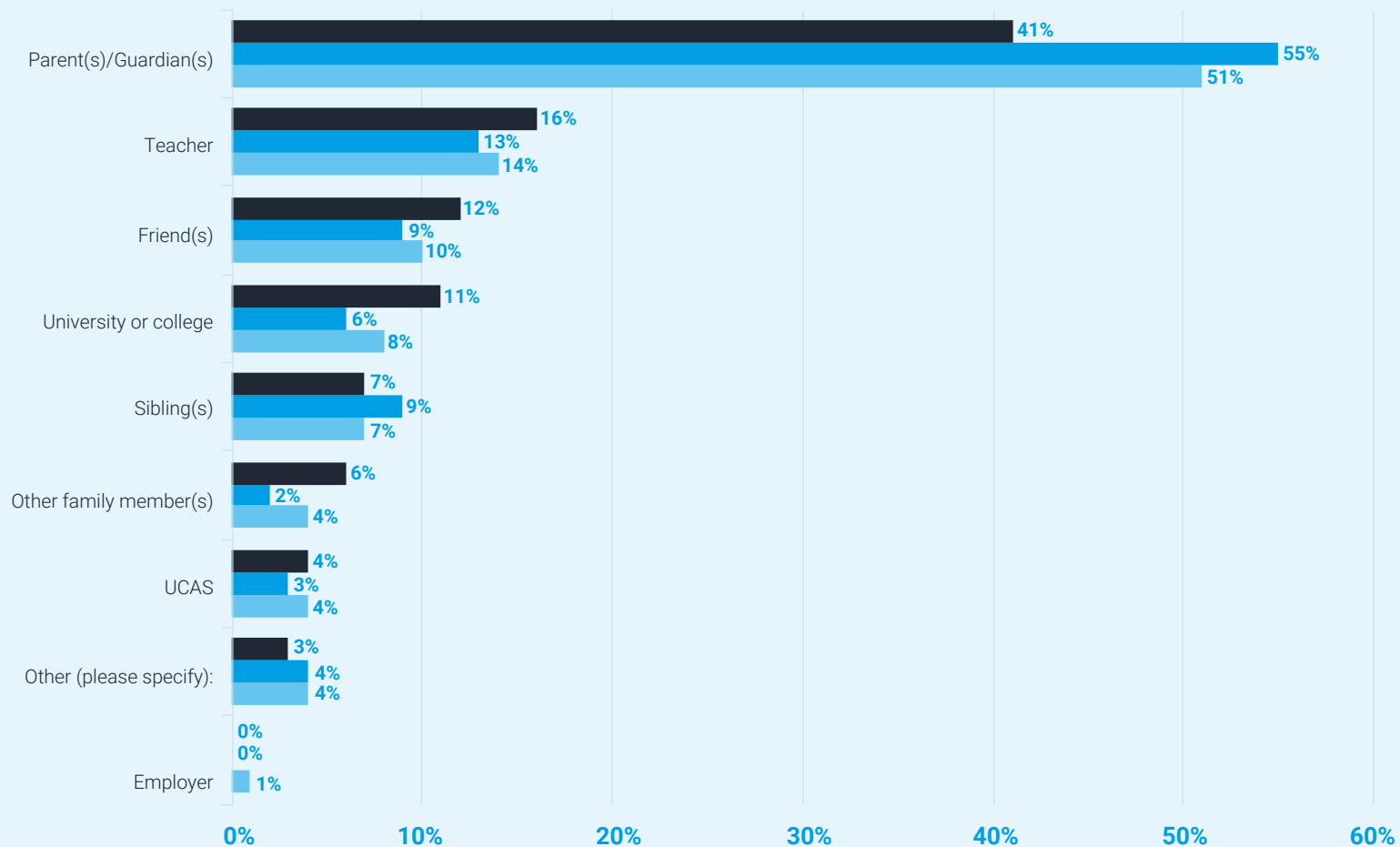
Q. Where did you first hear about the university or college you found a place at in Clearing?

**Support comes from loved ones.**

Parents and guardians are by far the most important source of support (41%) for applicants who find themselves in Clearing.

But friends (12%), teachers (16%), and universities (11%) are also on the rise – diverse supporters for diverse outcomes.

**Parents remain the key supporter, with 41% of applicants speaking to them first, after they find out they need to use Clearing**

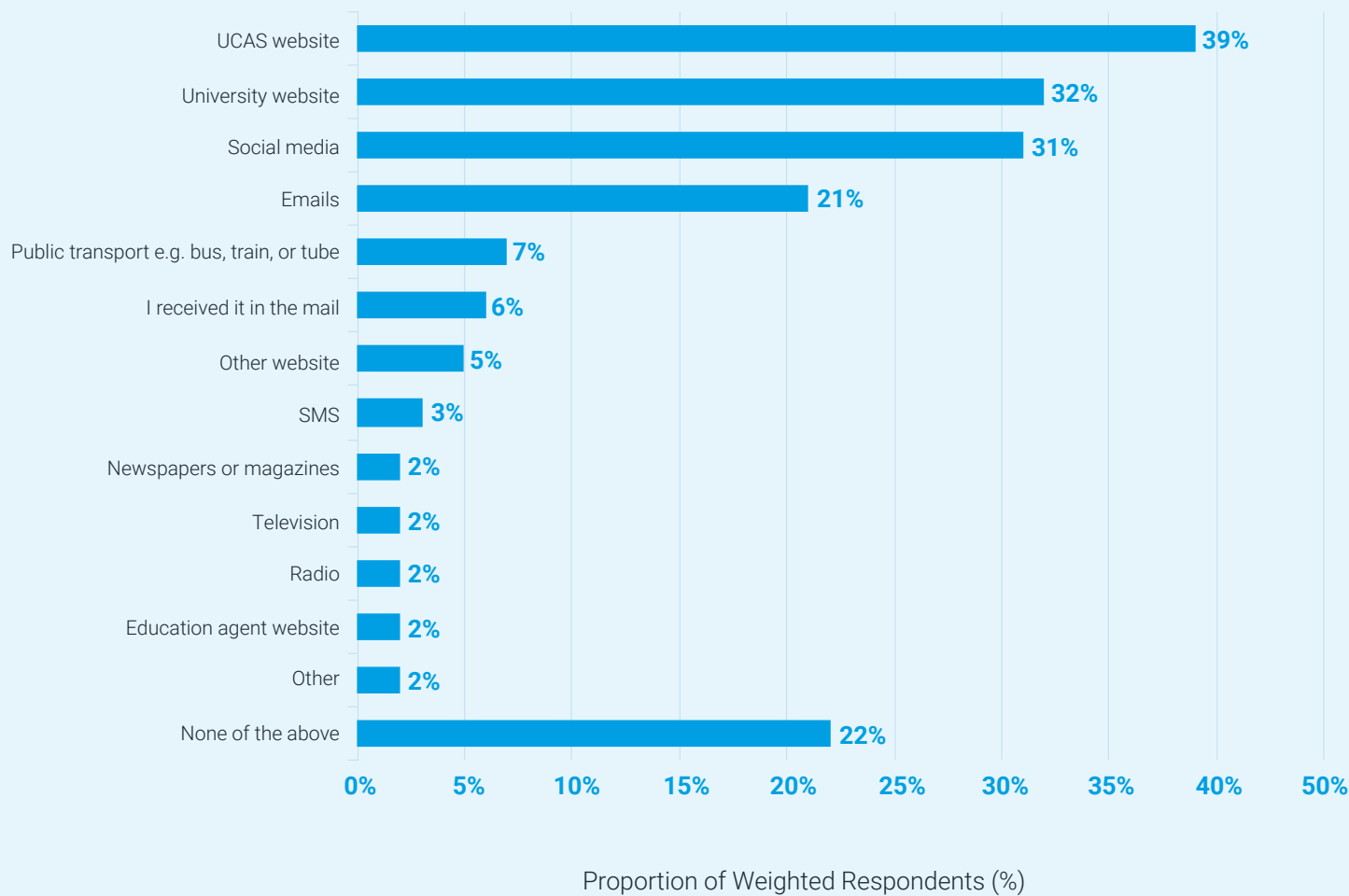


- 2023 Clearing placed
- 2022 Clearing placed
- 2021 Clearing placed

Proportion of Weighted Respondents (%)

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

**Q. 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.**



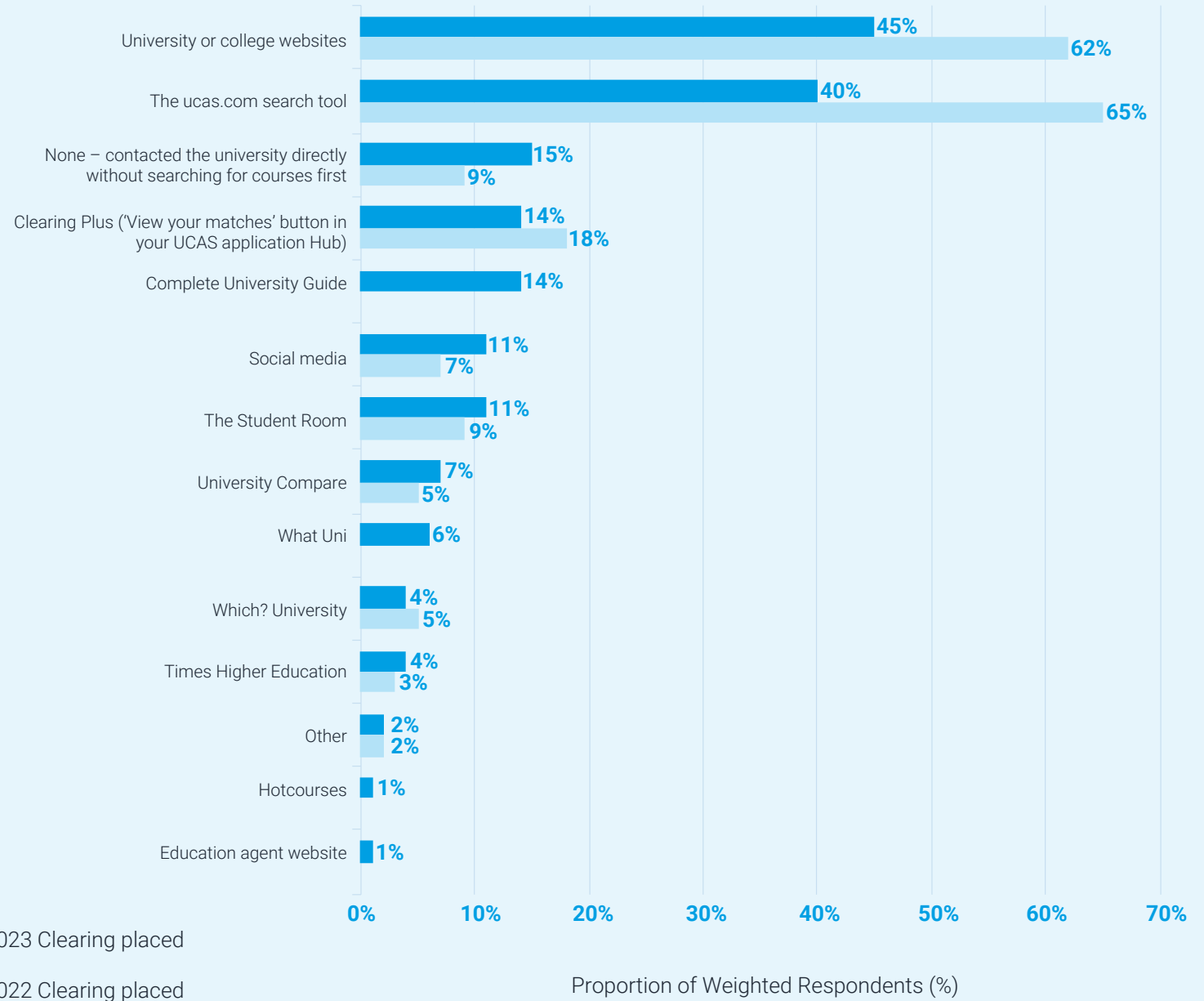
**Awareness via advertising comes from UCAS, universities, and social media.**

Clearing users are seeing opportunities out in the wild from a wide range of sources.

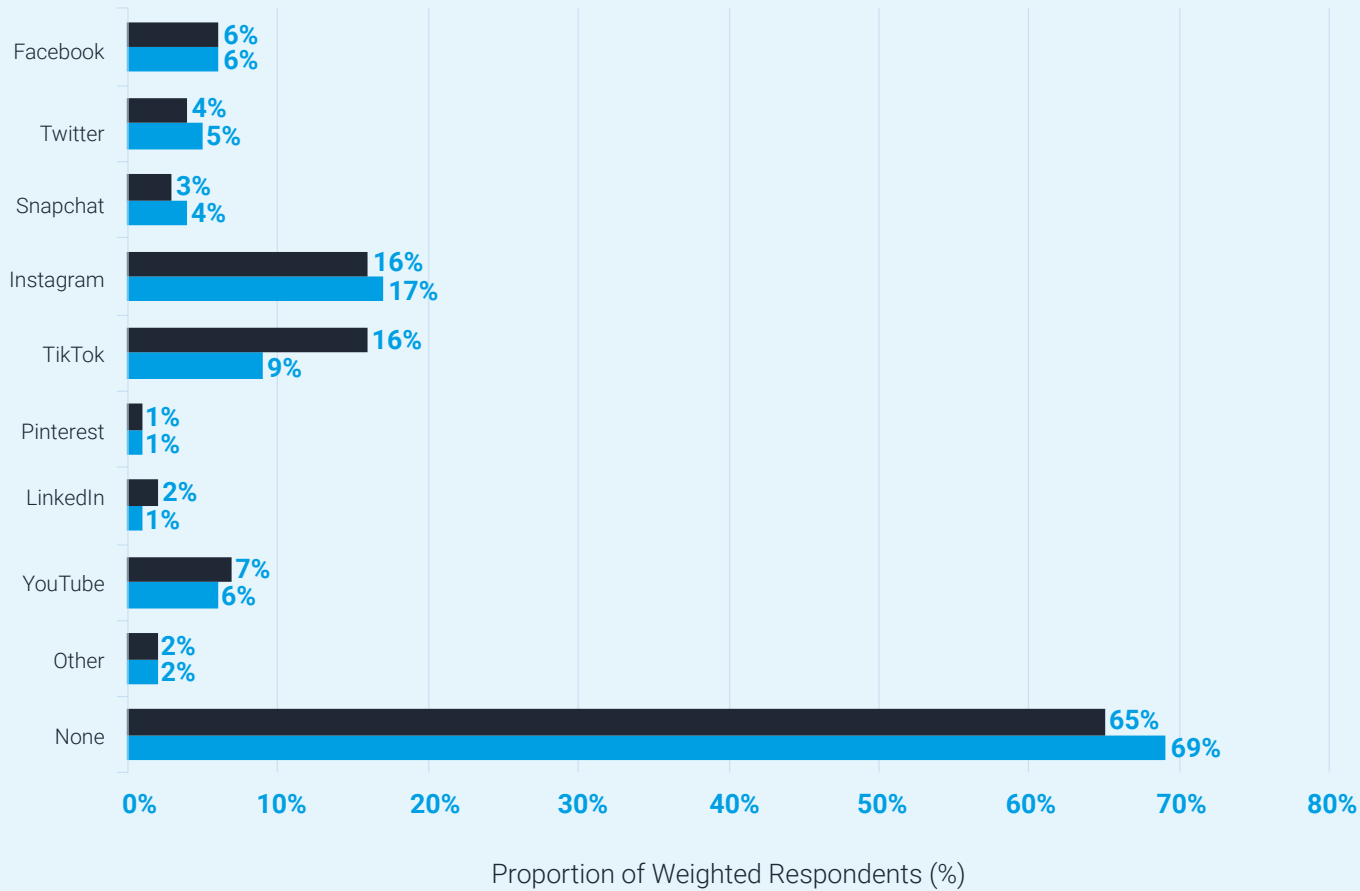
**45% of applicants are actively searching for places across university or college websites.**

Research is diversifying too, with big drops in the traditional leaders (although it's a return to regular proportions after a big spike last year) and rises in social media and student forum/guide websites.

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



**Q. Which, if any, social media platforms did you use to search for Clearing places?  
Please tick all that apply.**



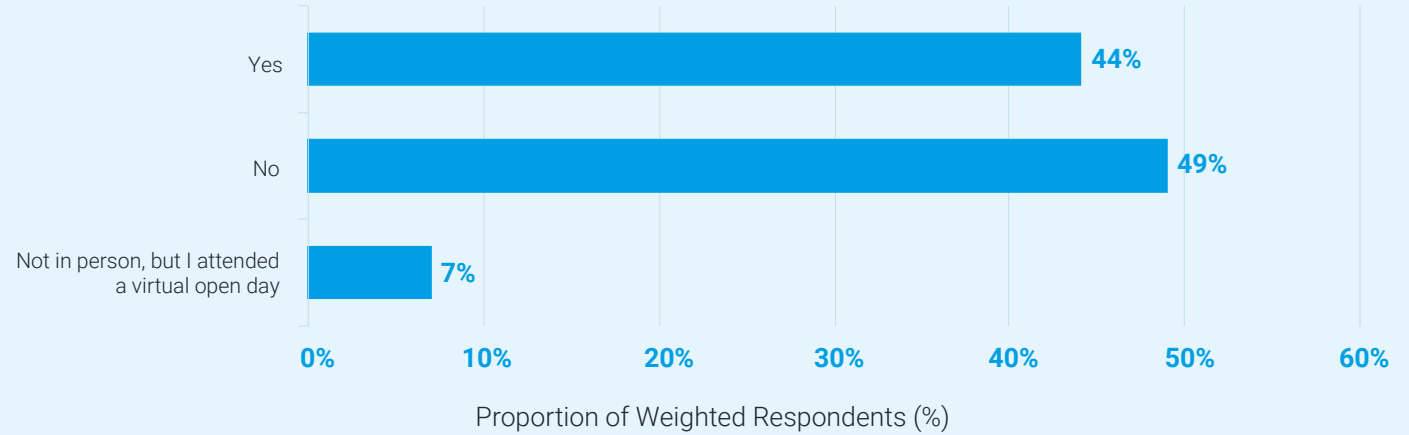
■ 2023 Clearing placed  
■ 2022 Clearing placed

**And although most applicants aren't searching on social media for Clearing places, 16% are now using TikTok and Instagram.**

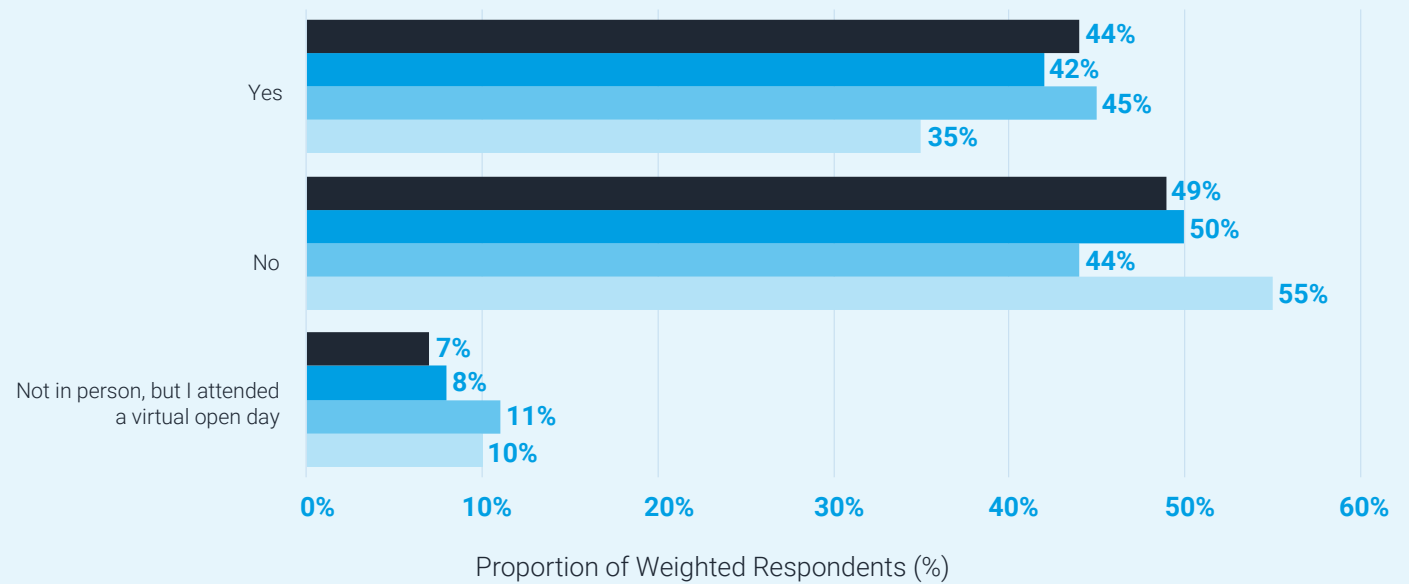
Most applicants didn't visit the university they were placed at, although with 44% attending, visits are still an important part of the research process for many. Virtual open days, on the other hand, dropped to just 7% attendance.

Q. Have you visited the university or college you're now placed at?

- ▶ No. respondents: 6,093
- ▶ Weighted no. respondents: 74,486



44% of applicants have visited the university they placed at

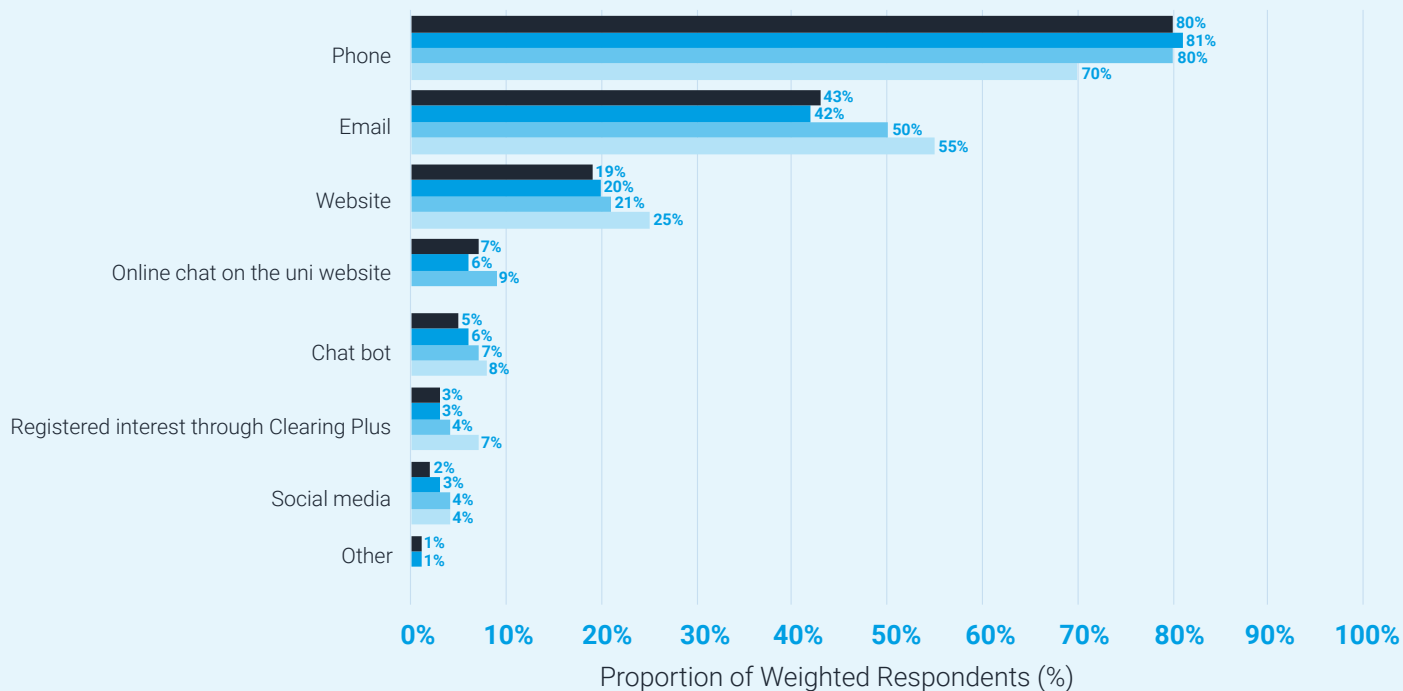
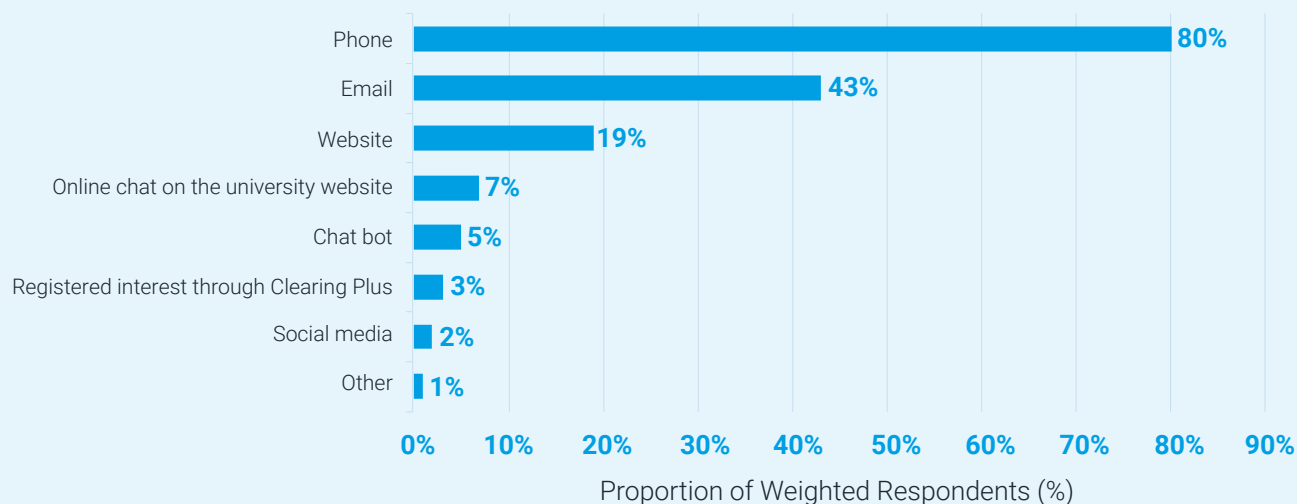


2023 Clearing placed
  2022 Clearing placed
  2021 Clearing placed
  2020 Clearing placed

Q. Have you visited the university or college you're now placed at?



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



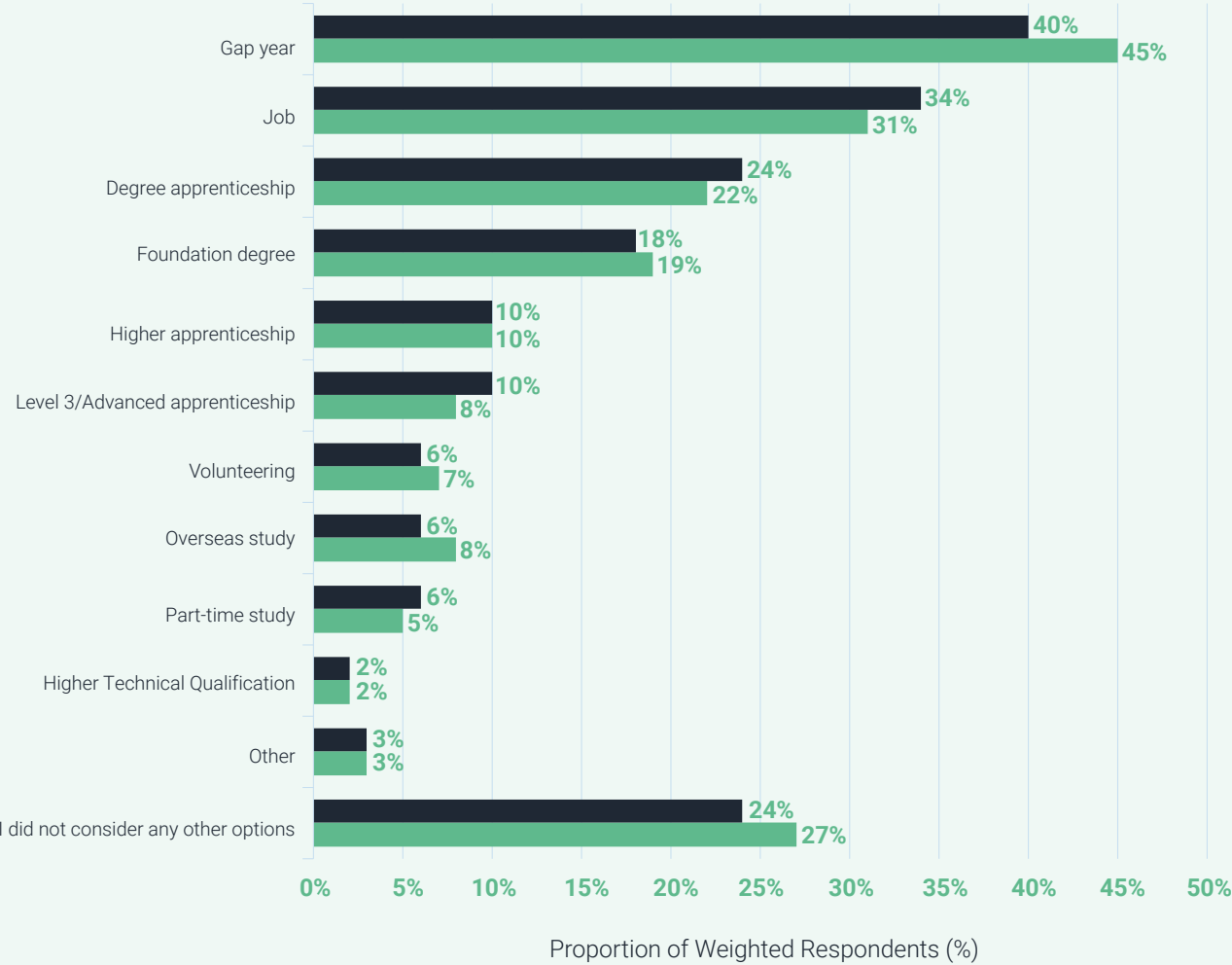
2023 Clearing placed
  2022 Clearing placed
  2021 Clearing placed
  2020 Clearing placed

**Digital natives they may be, but phone remains by far the primary method of communication when it comes to Clearing.**

# MOTIVATIONS & DECISIONS



Q. 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.



■ 2023 Clearing placed  
■ 2022 Clearing placed

**Nearly four in five applicants consider other options while they're searching for a place in Clearing.**

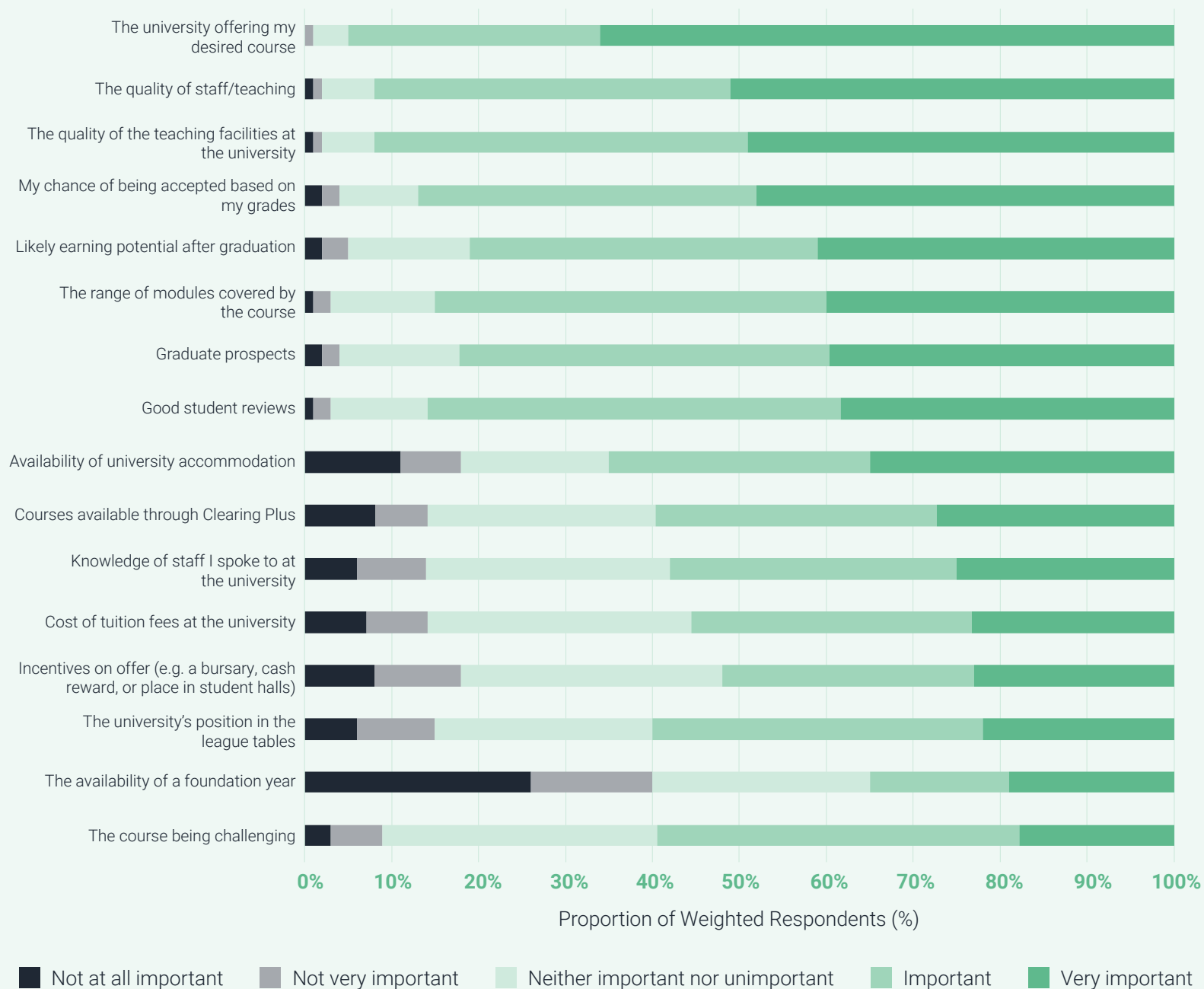
As determined, targeted, and intentional as this year's Clearing searches are – that doesn't mean they're close-minded to other outcomes.

More applicants considered employment and degree apprenticeships – which both offer earlier earning potential during the rising cost of living – and fewer considered gap years or volunteering, which could delay higher earning.

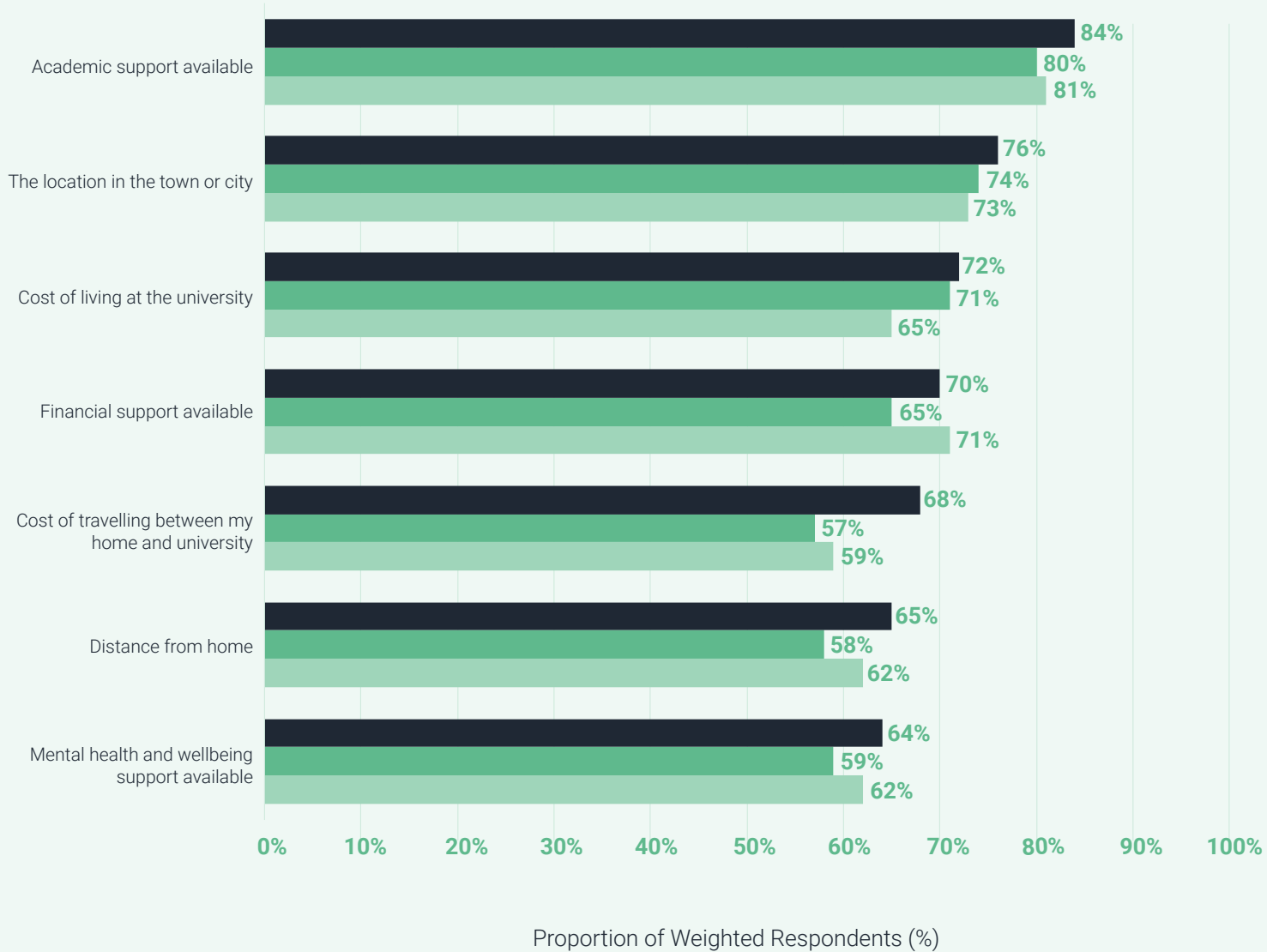
**Staff/teaching quality and teaching facilities matter to over 90% of applicants. 87% are considering their likelihood of being accepted alongside graduate prospects and earning potential, the range of modules, and student reviews.**

Cost of tuition fees have grown in importance (+7 ppts from 2022) as have incentives on offer (+5 ppts from 2022).

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



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



- 2023 Clearing placed
- 2022 Clearing placed
- 2021 Clearing placed

**Cost of living is now the third most important factor when choosing a place in Clearing.**

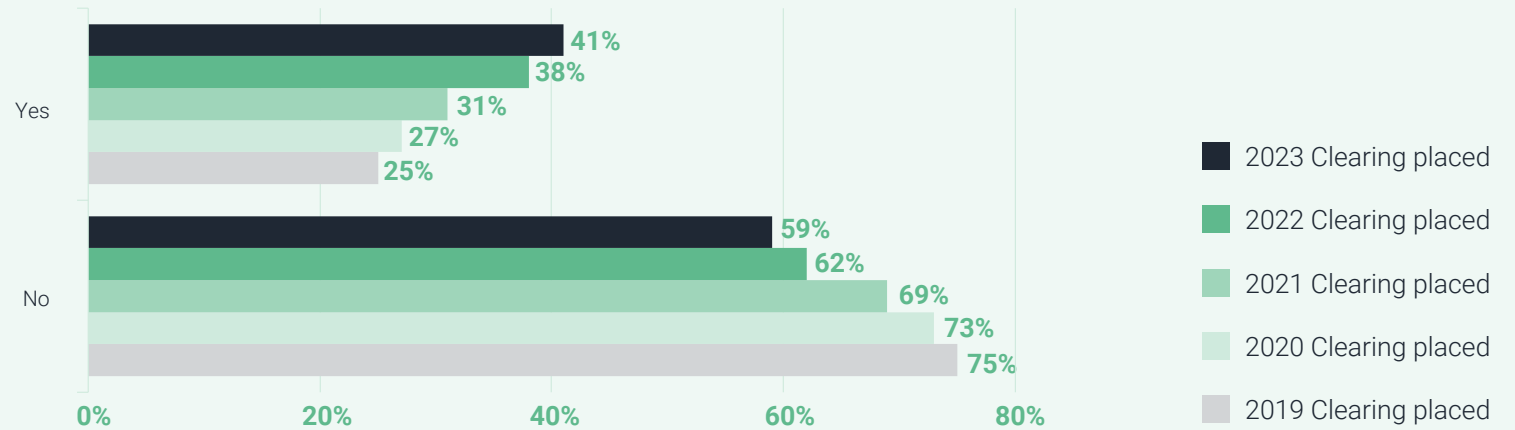
Personal preferences are also becoming more prominent:

- ▶ Option to continue living in my own home (49% important, +17 ppts from 2022)
- ▶ Cost of travelling between my home and university (68%, +11 ppts)
- ▶ Availability of support for other personal circumstances (43%, +10 ppts)
- ▶ Diversity on campus (60%, +7 ppts)
- ▶ Sustainability on campus (55%, +5 ppts)

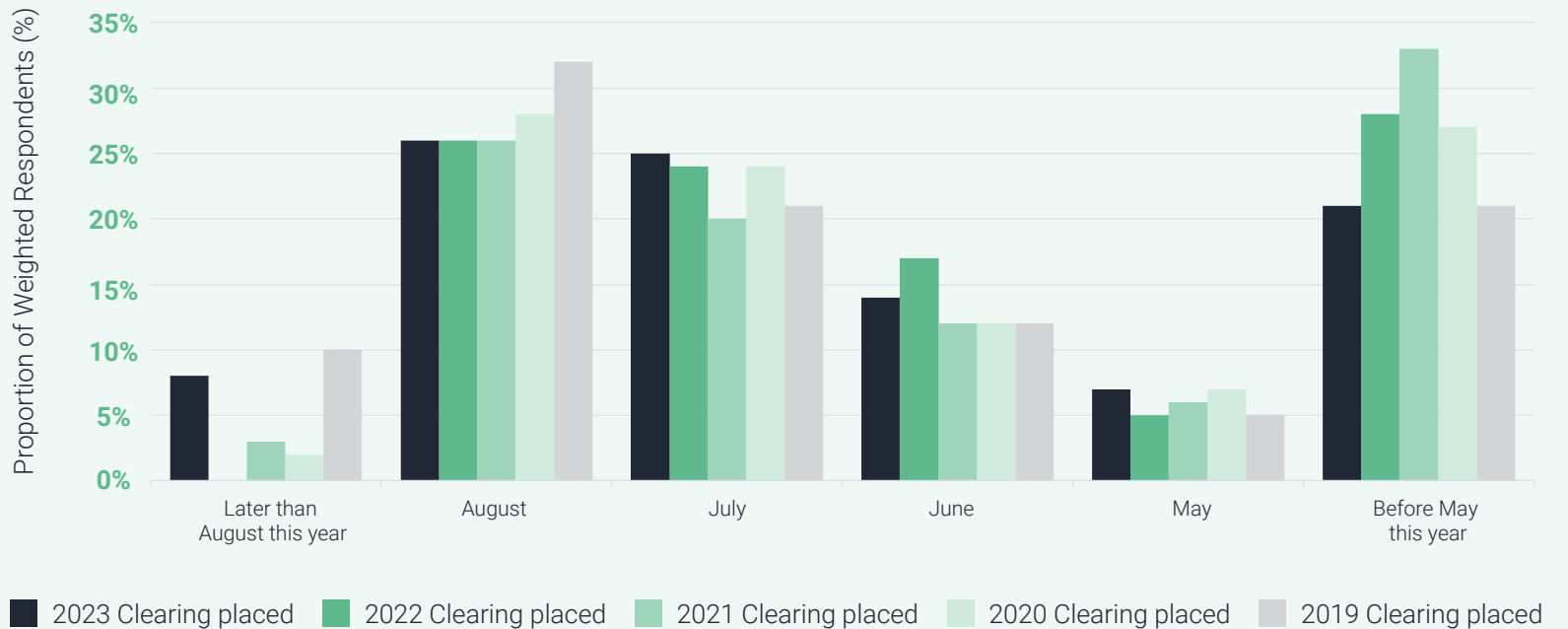
**'Direct to Clearing' is increasingly becoming an intentional, planned strategy.**

Twice as many applicants are now planning to apply directly to Clearing.

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



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



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



Proportion of Weighted Respondents (%)

**Patience and preference are rising for direct applicants.**

Over a quarter waited to see what their personal circumstances were (+4 pts from last year), likely fuelled by the rising cost of living.

A similar amount had a late change of heart about applying, and nearly a quarter use Clearing to transfer from an existing university course.

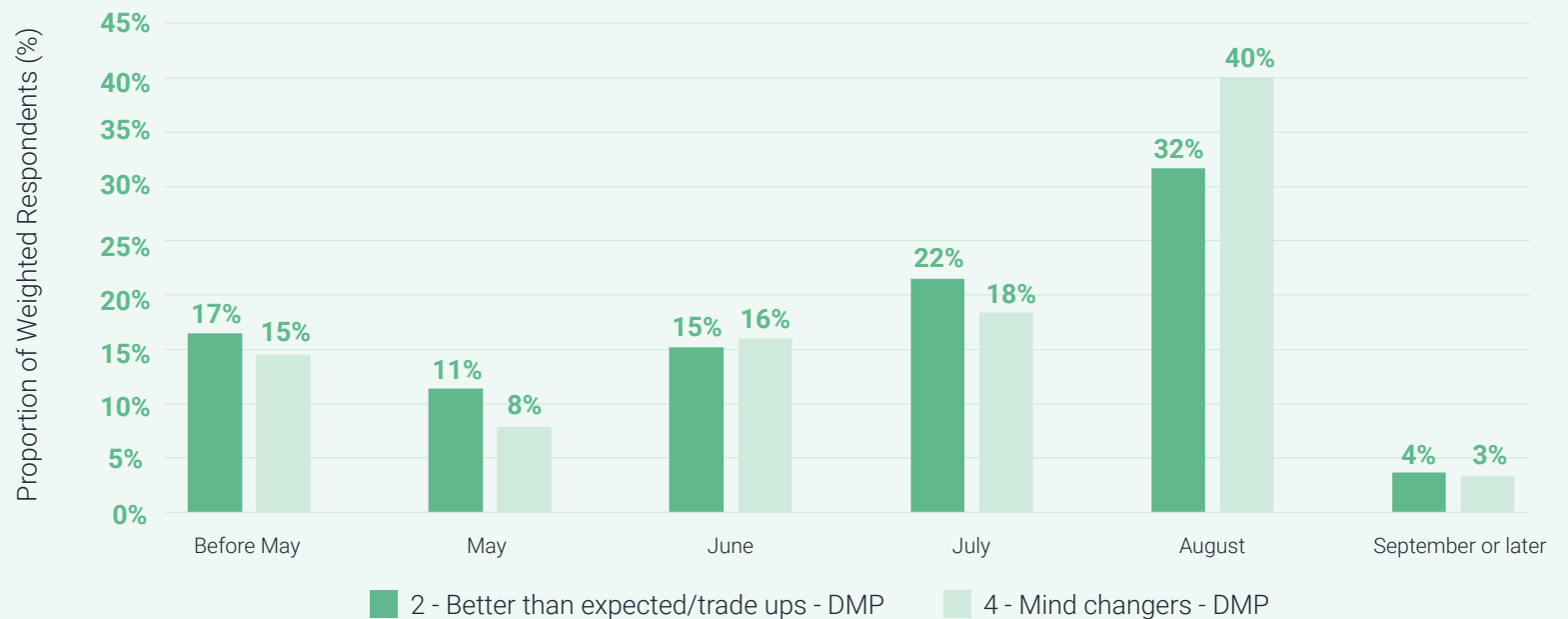
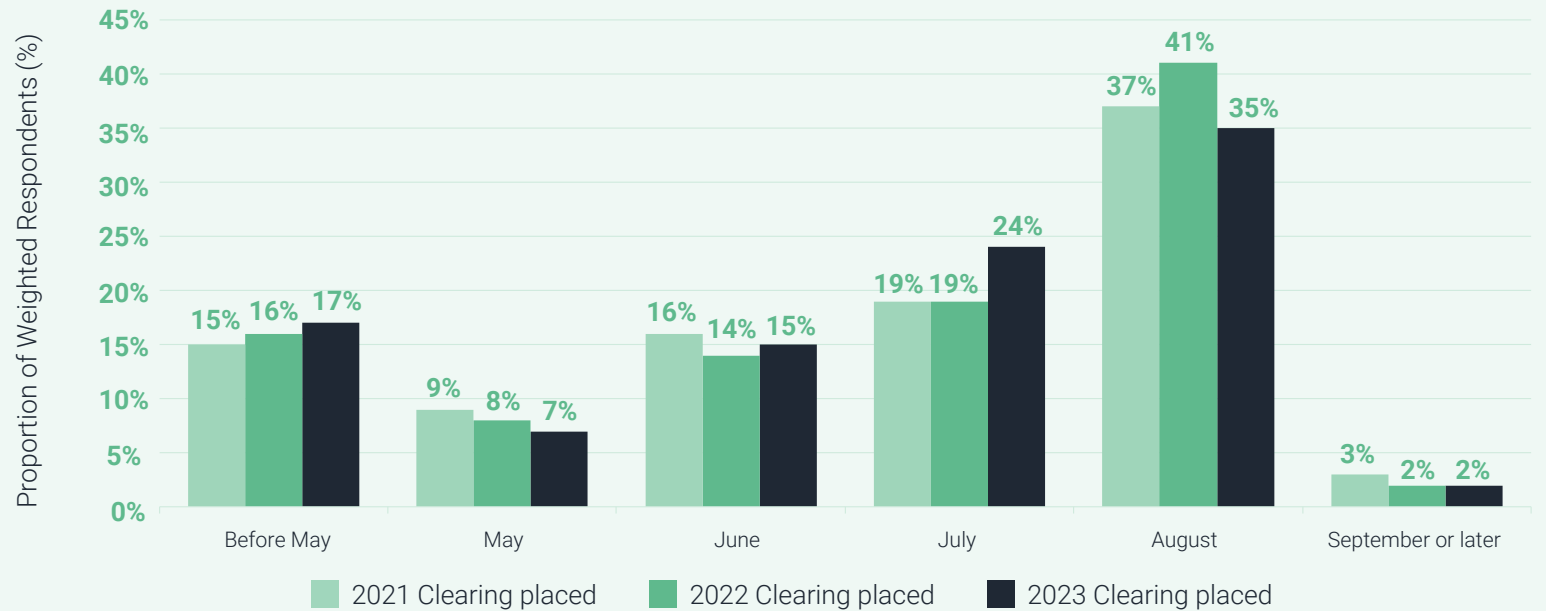
**More applicants who use 'Decline my Place' are thinking about applying elsewhere earlier in the cycle.**

Almost a quarter now start to consider this in May and June.

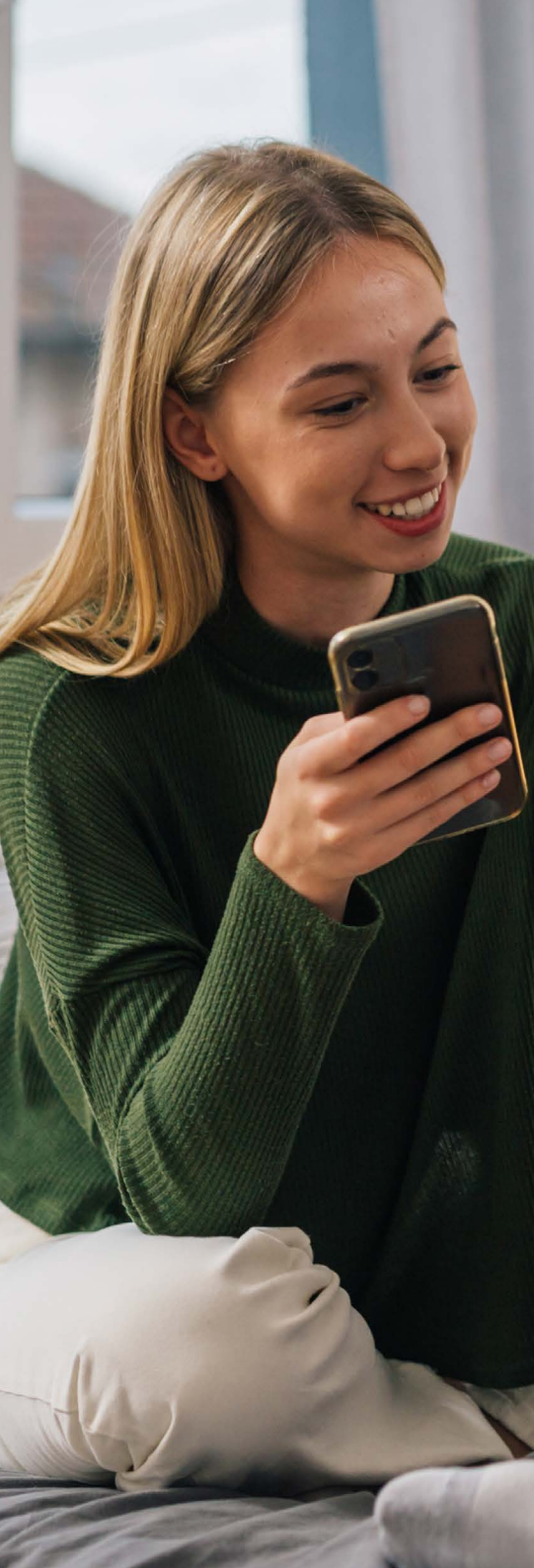
More of The Trade-Ups (65%) considered switching applications before August than The Mind Changers (57%).

The Trade-Ups are exploring the option before they even get their results, keeping their options open – while The Mind Changers are less likely to consider it until they know it's possible (or necessary).

**Q. When did you start thinking about applying somewhere else?**

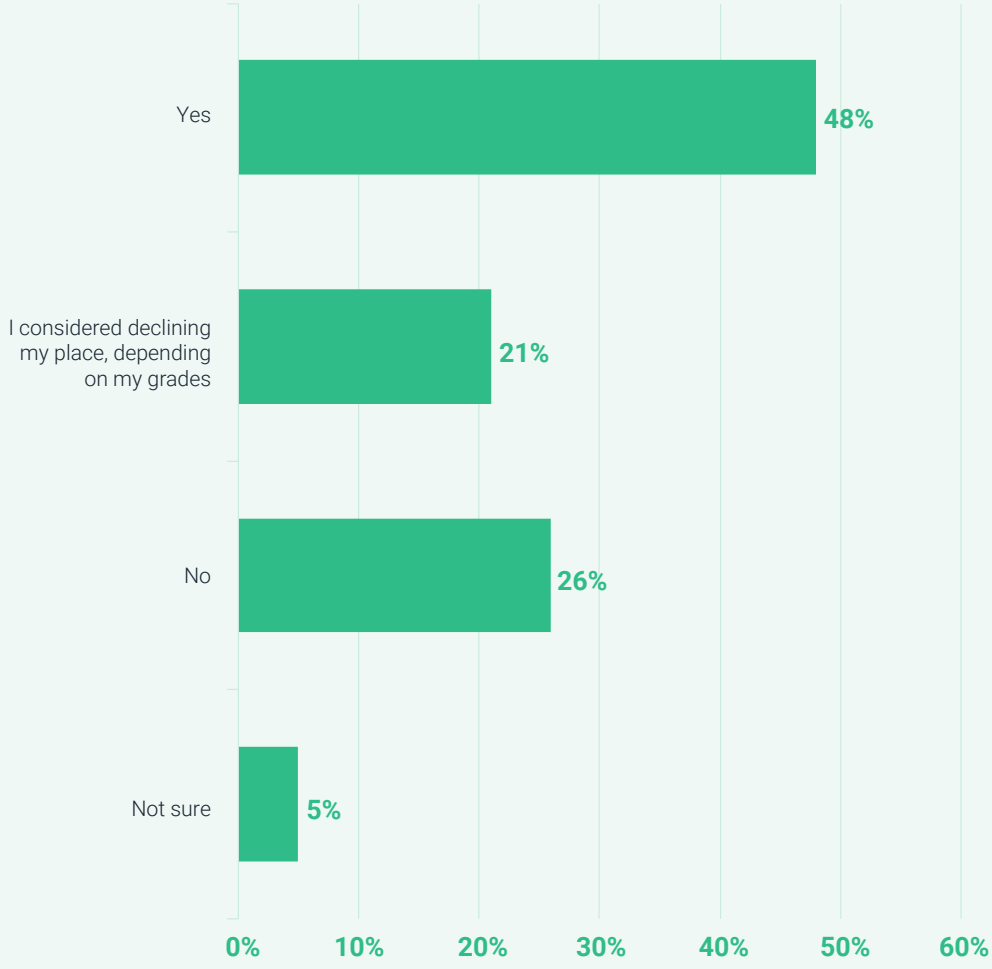






**Q. Did you change your mind about studying at your original choice before results day?**

- ▶ No. respondents: 1,893
- ▶ Weighted no. respondents: 23,338



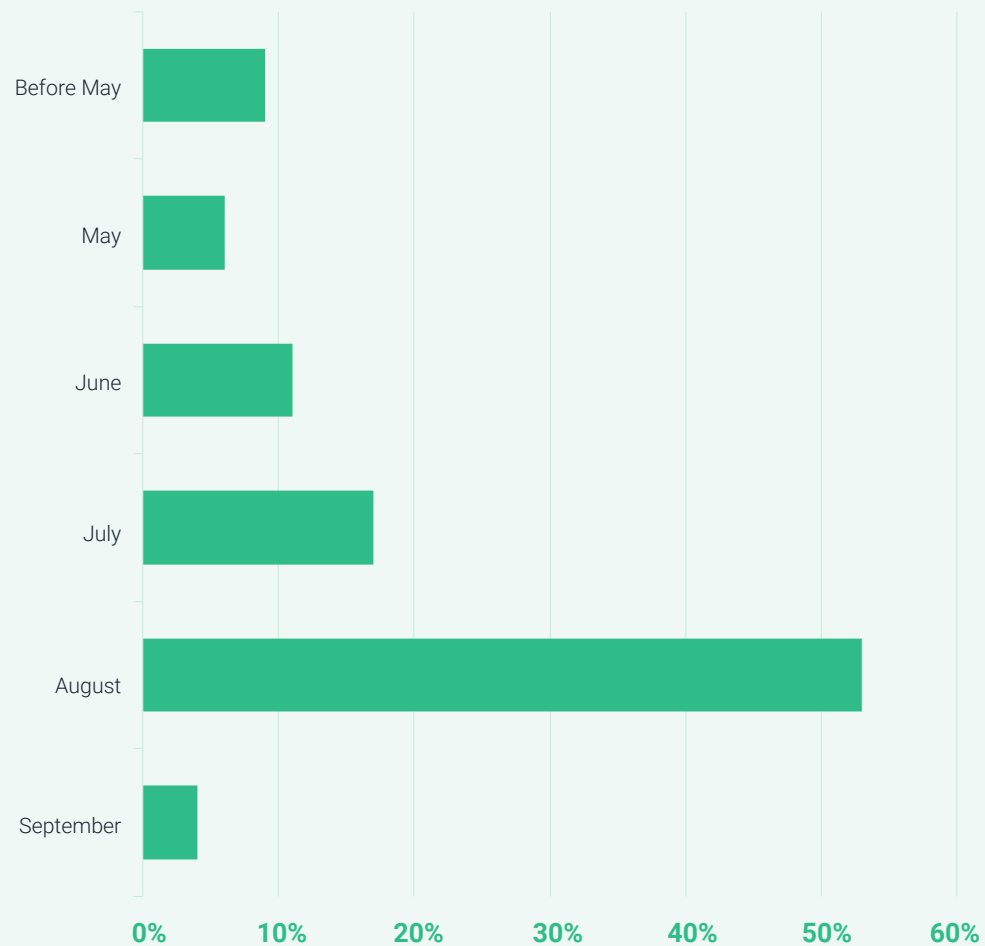
Proportion of Weighted Respondents (%)

**Nearly half (48%) changed their mind about studying at their original choice before results day.**

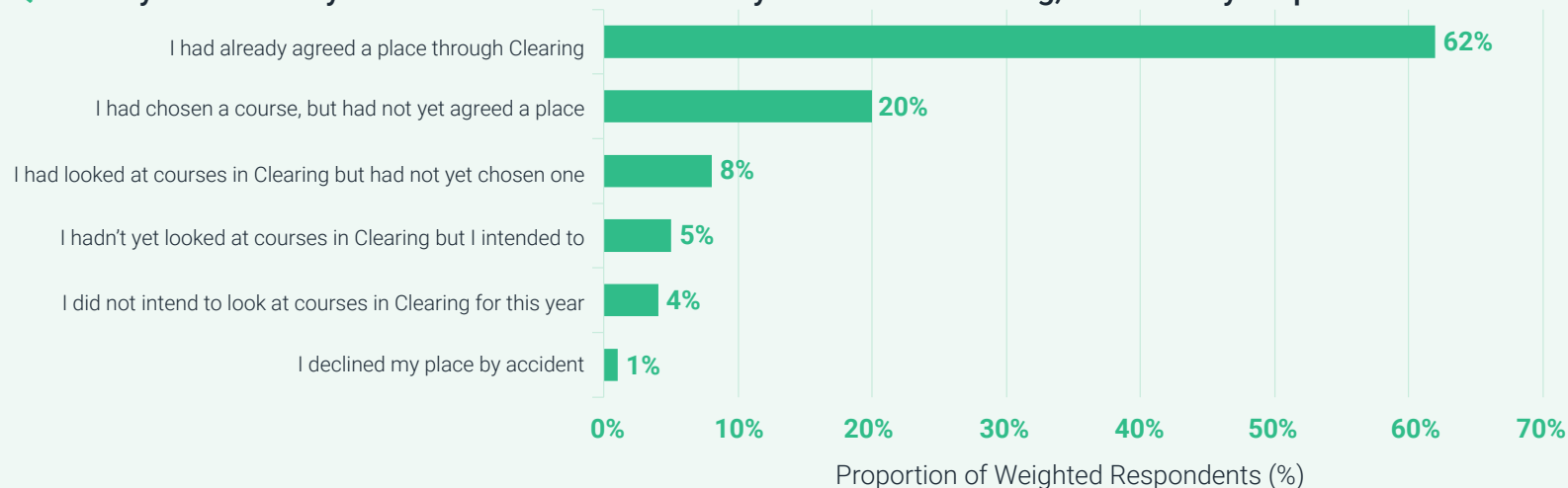
More than half decide to apply somewhere else in August, but pre-August combined it's 43%.

Q. Did you change your mind about studying at your original choice before results day?

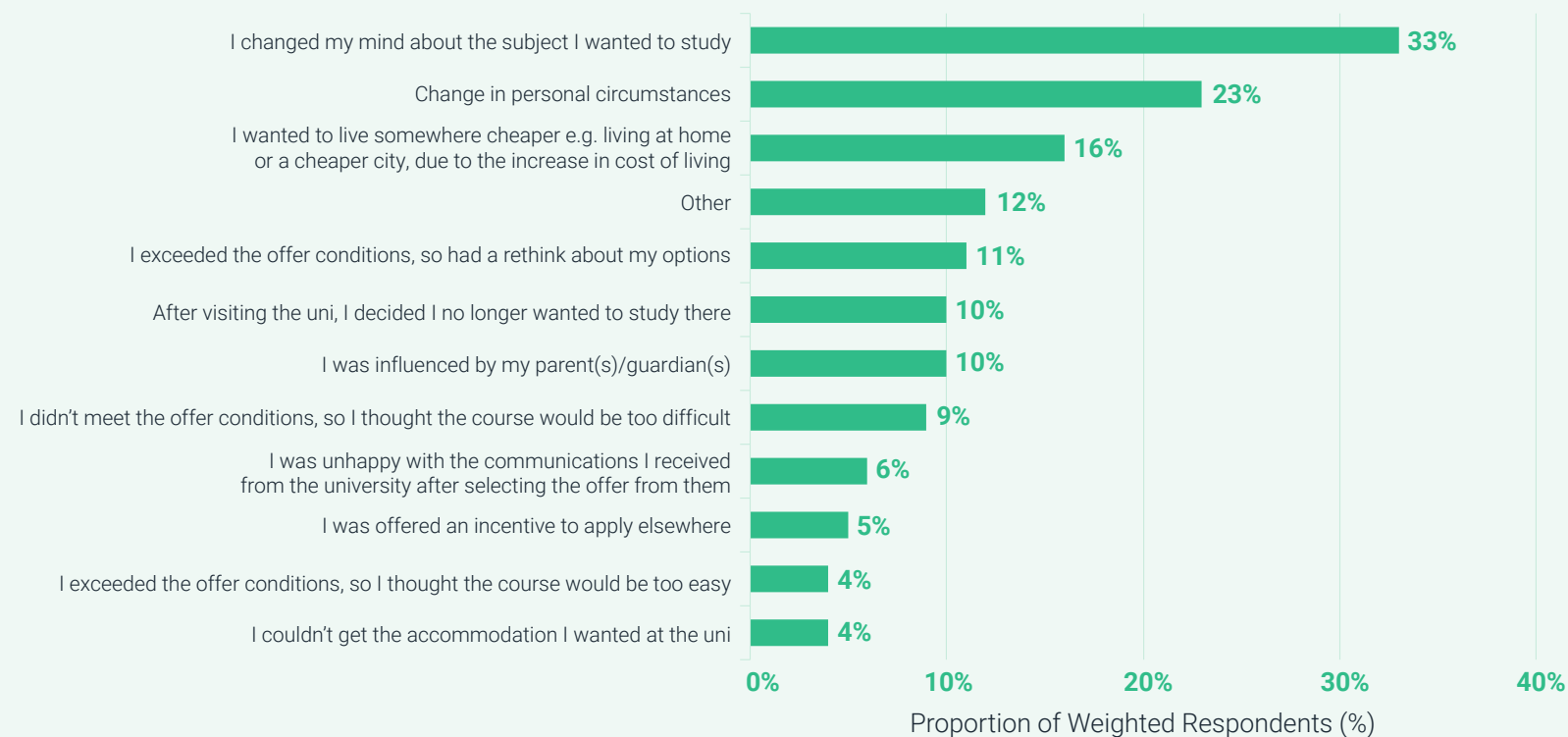
- ▶ No. respondents: 1,893
- ▶ Weighted no. respondents: 23,338



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



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



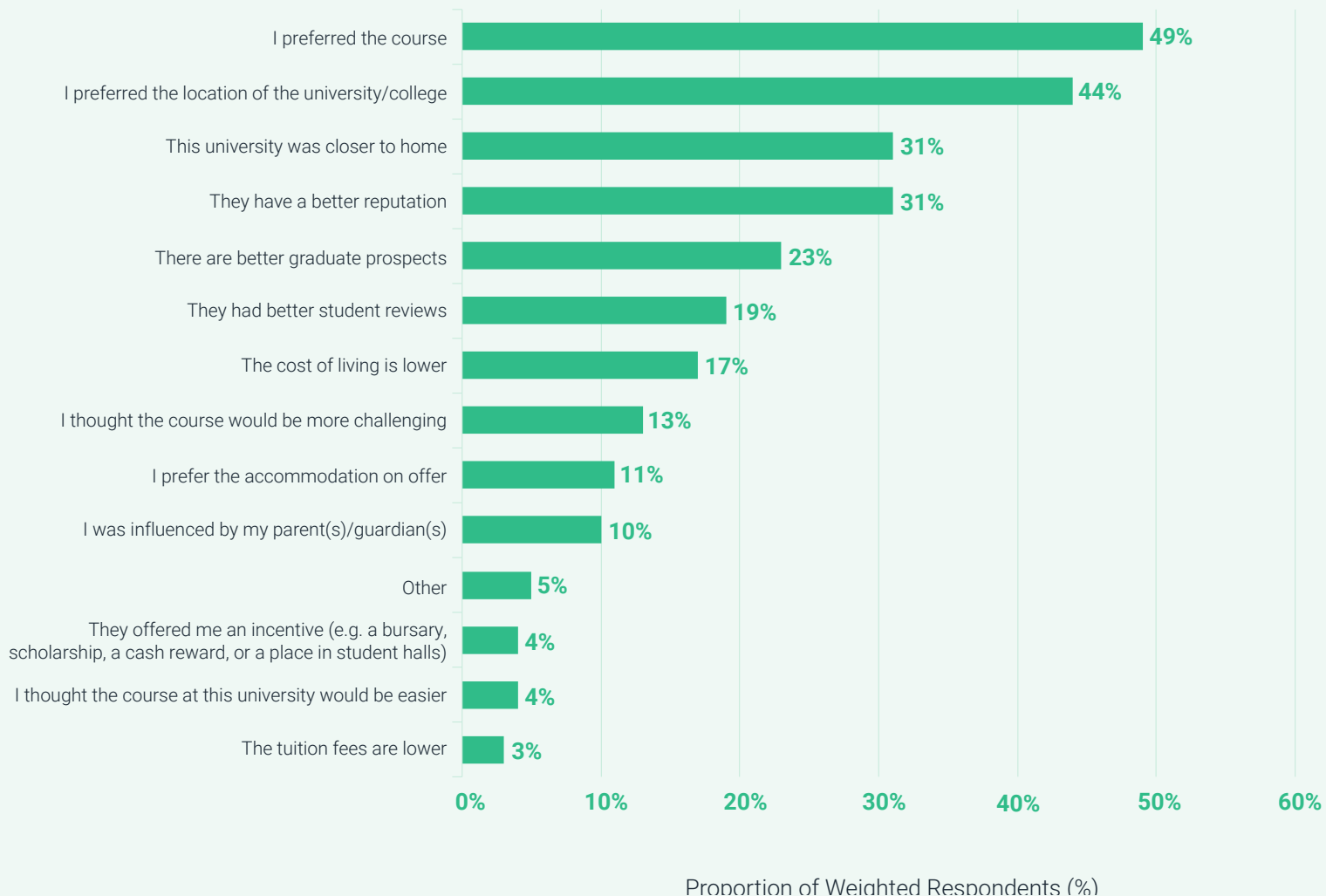
**Three in five already had a place agreed through Clearing when they declined their place, and a third of those that decline their place changed their mind about their subject.**

Fewer declined their places to live somewhere cheaper (-7 pts), but more did so because of a change in personal circumstances (+4 pts). Accommodation availability and university communications are not having a significant impact on choice.

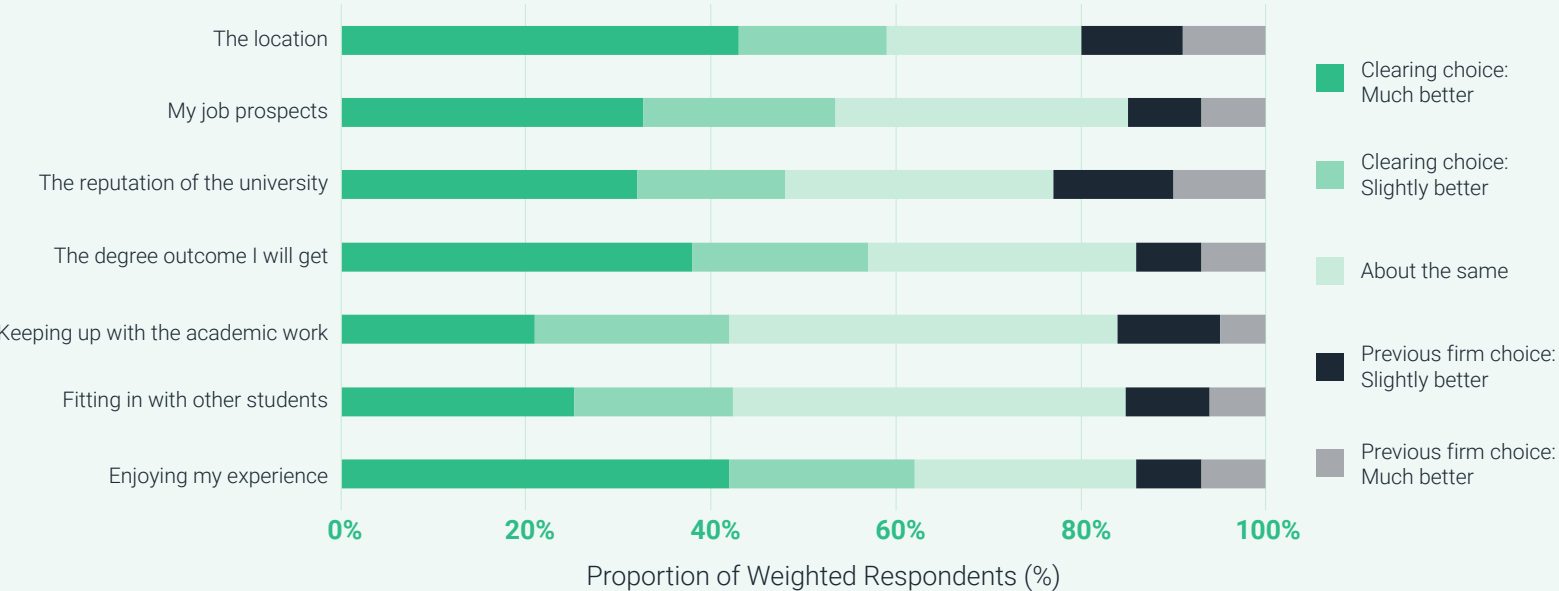
### Location of campus plays a role for 44%.

And nearly a third are declining their place to find a university closer to home.

**Q. 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.**



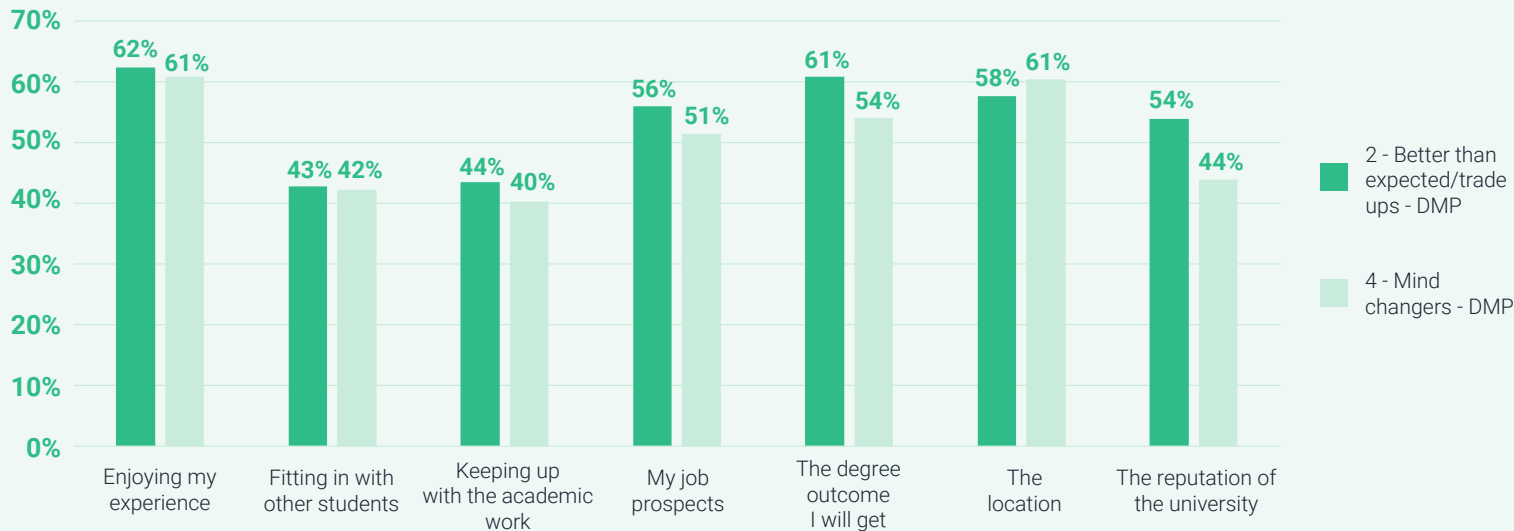
**Q. Considering both the university you had as your firm choice, and the one you found a place with in Clearing, which do you think is better for you on the following factors?**



**For their new choice, 62% think they will enjoy their experience more than their original.**

54% of Trade-Ups think their new choice is better for reputation, compared to 44% of Mind Changers. 61% think they will get a better degree outcome.

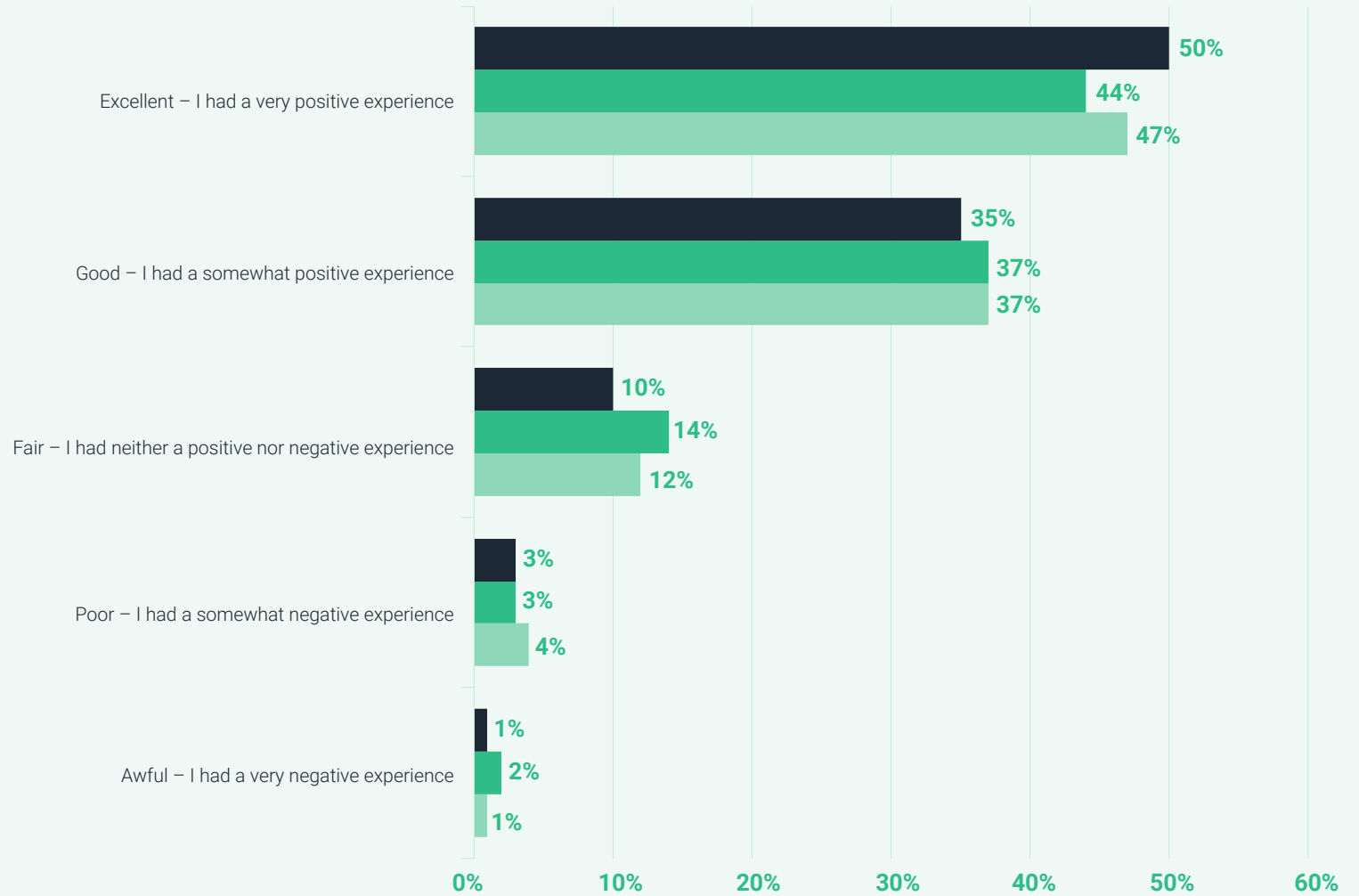
But 61% of Mind Changers think the location of their Clearing choice is better – reflecting their motivations and practical reasons for changing.



**And when it comes down to overall experience, the vast majority of Clearing users were happy.**

No matter the route or Clearing persona, 92% of applicants were confident that they'd made the right choice for them in Clearing, and 85% had a positive experience.

**Half of applicants had a very positive experience - increasing by 6 ppts this year**



- 2023 Clearing placed
- 2022 Clearing placed
- 2021 Clearing placed

Proportion of Weighted Respondents (%)

Q. Overall, how do you rate your experience of finding a university or college place through Clearing?

# CONCLUSION & RECOMMENDATIONS

## 1. Clearing is becoming an intentional strategy, not just a second chance

- ▶ 41% of those that applied direct to Clearing were always planning to do so (in 2019 this was 25%).
- ▶ The language, advice, and tools around applications need to change to accommodate this.

## 2. Acknowledge, segment, and strategise to each of the five types of Clearing user:

- ▶ The Disappointed need reassurance, advice, guidance, and a gentle helping hand.
- ▶ The Mind Changers want specificity on how Clearing works and what you can offer.
- ▶ The Trade-Ups view you as an option – but one of many – so they want your USPs front and centre.
- ▶ The Direct to Clearing are looking to match your offer with their practical personal preferences.
- ▶ The No Offers are not desperate – all signs point to them not settling if it's not right.



### 3. Provide more information, with more specifics, earlier in the cycle

- ▶ More than a third start researching by January, and most research the uni they place with before Clearing opens.
- ▶ They're looking for info on teaching quality, facilities, modules, and graduate earning/prospects.

### 4. Influencer/adviser marketing has never been more important

- ▶ Word-of-mouth now drives more Clearing placements than anything else, and most applicants turn to their parents or guardians for support before anybody else.

### 5. The cost of living is driving interest in alternate pathways, even for those in the midst of their Clearing search

- ▶ 34% are considering a job, 24% a degree apprenticeship – both up on last year.
- ▶ And even for those continuing to university, the cost of living is a top three lifestyle factor for choosing the right place.

### 6. Modern Clearing is driving empowerment and choice, producing applicants less likely to settle

- ▶ More are considering alternatives to university.
- ▶ More are looking for university places that exactly match what they want.
- ▶ More are only targeting one university during Clearing.





# UNDERSTAND AND CONNECT WITH STUDENTS IN CLEARING

We can help you understand the likely behaviours of the next Clearing cohort, and use the right channel combinations to reach them at key touch points throughout Clearing.



## RESPONSIVE

Addressing current customer needs and market trends



## EFFECTIVE

Delivering cohesive and impactful packages based on 2023 performance



## TRANSPARENT

Simple, with powerful product combinations

There's a range of options with different price points – offering choice and meeting the needs of different types of providers with different objectives and budgets.

Get in touch with your UCAS Customer Manager, or email [clearingmedia@ucas.ac.uk](mailto:clearingmedia@ucas.ac.uk) to find out more about our data and media opportunities.

