DIGITAL MEDIA IN THE INTERNATIONAL HIGHER EDUCATION MARKETPLACE

2023 REPORT

CONTENTS

WELCOME BACK TO OUR INTERNATIONAL REPORT

Our work in the Higher Education sector continually reinforces that UK universities can offer international students vibrant life experiences, top quality teaching, and a welcoming environment that they cannot find elsewhere.

This report aims to highlight key sources of international students where we can reach them through digital media. International students bring with them financial stability to universities, but just as importantly enrich the social and learning experience for everyone who attends an institution. A diverse student cohort adds a huge amount to the university experience and is an increasingly essential part of higher education in the modern world.

Each international region presents different challenges, and we expect to address future campaigns to the needs and behaviours of each one. We specifically look at the social media platforms that offer the greatest reach and engagement with student audiences, and the search engines that direct global use of the internet.

Before we begin, we would like to acknowledge the severe change in circumstances for Ukrainians and Ukrainian students. We believe everyone should have the right to safety and an unhindered, uninterrupted education, and we look forward to helping universities welcome those who have been affected to the UK.

INTRODUCING THE INTERNATIONAL STUDENT DEMOGRAPHIC

The higher education market is moving away from the Millennial generation and focusing its efforts on Gen Z, in the age range of 16 to 24-years-old. Gen Z have significant differences from other generations and all marketing should be adapted to suit their preferences. It is also important to remember that they are digital natives, and as a result are very digitally fluent.

Gen Z are trendsetters; they value ethical business practices and have a shorter attention span of around 8 seconds[1]. QS[2] finds that students have become increasingly concerned with environmental issues, and 80% of international candidates report that they believe UK universities can do more to be sustainable. Snapchat[3] finds that its users look for brands that represent their worldview, so strengthening brand reputation in this area is essential.

To attract international students, higher education providers should be taking these factors into consideration. Although some countries (and parents) encourage students to attend university in the UK for the prestige[4,5,6], Gen Z are valuing a supportive and welcoming place of study more and more[7].

The Office for Students[8] notes that although the UK has sufficient data on the numbers of international students coming over for study, little is known about their needs and experiences. Therefore, this report contains important research on how to reach international students based on their location.

WHY YOU WANT INTERNATIONAL STUDENTS

International students often pay higher fees to study abroad. As a result, they have a disproportionate effect on a country's economic performance, especially if they choose to stay in the host country after they finish study[9]. They also contribute via living expenses, and by creating a more diverse talent pool[9].

Diversity can enhance a domestic students' own higher education experiences too. They are exposed to new cultures and perspectives, providing them with a stronger ability to compete in the global careers marketplace[8]. If these international students return home after study, better trade links and networks can be established between their host and home countries[8].

In response to concerns over losses in international student numbers resulting from Covid-19 and Brexit, the UK government opened new immigration routes to make it easier for transnational study[10]. Students now have more opportunity to come to the UK for education.

WHY THEY MIGHT WANT YOU

Later in this report we point out that there is competition in the international student market, particularly from the USA, Australia, and European countries such as Germany. To attract the target demographic, it is important to play to their demands, which as mentioned include sustainable and ethical business practices, but on a more personal level include: the experience of new cultures and great quality teaching, the opportunity to network, and to gain more independence.

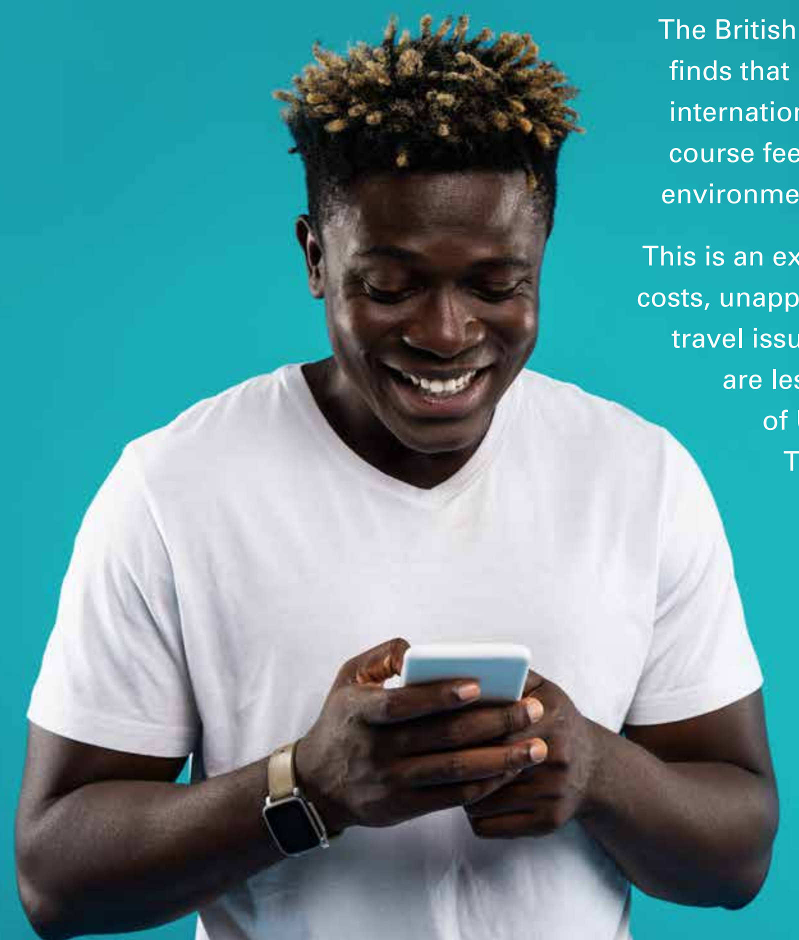
The UK is a reputable destination for study, due to its multitude of prestige universities. We also offer shorter degree schedules, which reduce financial strain for those who are concerned. These are unique selling points that should be highlighted during advertising campaigns.

The UK also offers the chance to explore across England, Scotland, and Wales. For those who travel far to get to the UK, Europe may have been an unreachable destination. But the UK's proximity to countries like Italy and Portugal means it is possible to explore other parts of the world.

The life experience that studying abroad brings with it is a great quality that employers search for, and this is often a big motivator for those coming from areas like China, who value transferable skills and work opportunities.

Advertising around the globe gives you the chance to create genuine connections across multiple regions and demonstrate the mutually beneficial relationship between international student and university.

WHY THEY MIGHT NOT WANT YOU



The British Council's[11] 'Temperature Check' report finds that important areas of messaging for international students include good cost of living, course fees, quality of teaching and a welcoming environment and culture.

This is an expected response to concerns over living costs, unappealing British lifestyles, high study fees and travel issues[11]. However, this report finds that there are less worries about the welcoming nature of UK universities than there were last year. This is a positive shift in attitude from the problems of last year's cohort.

Students from abroad face higher fees than if they remain within their country, ranging from £9,250 to £65,000 a year (for the most expensive medically based courses)[12]. Naturally finances are therefore more of a concern.

International study can take a toll on financial and mental stability

Next year's cohort are also one of the first to begin university following the disruption caused by the Coronavirus pandemic. Many could be in a less financially stable position and therefore may experience more barriers to higher education than previous cohorts. Visas may also prohibit students from getting a job to support themselves[13], and Brexit means that EU students now pay more to study in the UK.

Students report feeling more anxious and depressed than before the lockdowns, showing the effects of the pandemic on mental health amongst young adults[14]. Not to mention, homesickness and culture shock may create a harmful environment for the more timid student[13].

This might impact international students disproportionately since cultural differences might prevent them from seeking support. Mental health can be considered a taboo topic and is still unrecognised in many regions[13]. As a result, nearly 20% of international cohorts report that they would be uncomfortable asking for help or support if they suffered from bad mental health[2].

JE NE COMPRENDS PAS

Language challenges can also affect a student's learning abilities and, since they are marked at the same standard as domestic students, influence their grades. Furthermore, UK educational systems often value participation in class, and international students may not feel confident getting involved[15].

Social activities are a large part of the 'university experience', but for international students, this can be difficult. It is common for groups of students from the same culture or country to form because they celebrate the same traditions, holidays, and share languages and interests[13]. However, this isolates them from their flatmates and course mates, and limits their integration into the UK.

A SHIFT IN THINKING

Evaluating the perceptions that international students have of the UK can help inform the content of your advertising, by addressing the identified problems. QS's[2] updated 2022 report highlights some key findings regarding these perceptions:

- **73%** of candidates consider the UK to be a 'safe' place to study, but this varies greatly depending on which region they come from
- **80%** believe UK universities can do more to help the environment, and **56%** believe they should aim to reduce the number of single-use plastics they use
- **60%** believe the UK has a high quality of education
- Only **32%** find the UK to be affordable
- **53%** perceive universities to be 'welcoming'

In response to these findings, QS[2] asks UK universities to engage with their environmental and student wellbeing responsibilities to reach a wider international audience. Chart 1 shows the key values that these audiences will search for in your institution when they are choosing where to apply to.

Chart 1 shows that quality of teaching still outranks all. But the lifestyle and attitude of universities are highly important. These are the biggest areas for investing resources.

To summarise, international students are valuable for UK universities, but they are a difficult cohort to reach in a very competitive climate. Although application numbers are slowly increasing, data from HESA[16] currently only has enrolment numbers up to and including the year 2021/22. We are therefore yet to see the full extent of Covid-19's impact on British institutions.

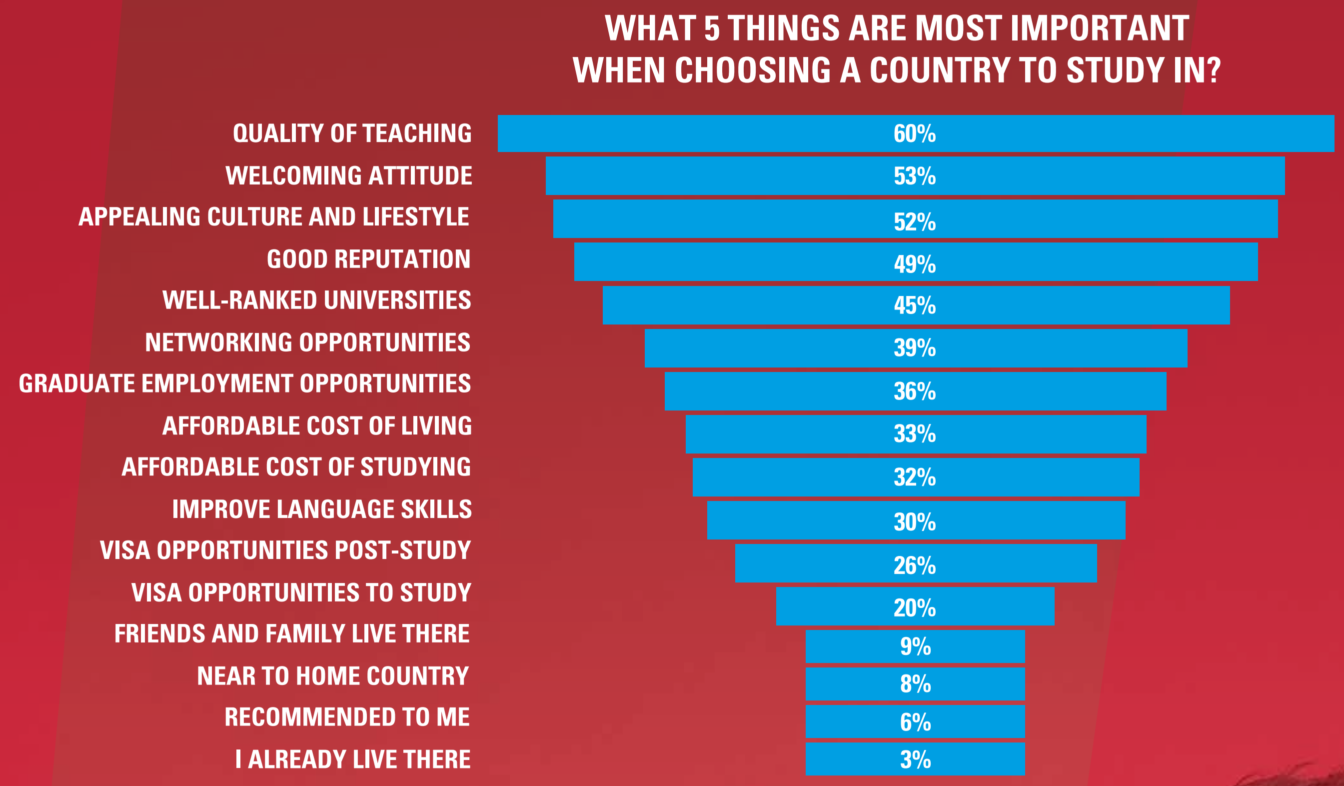
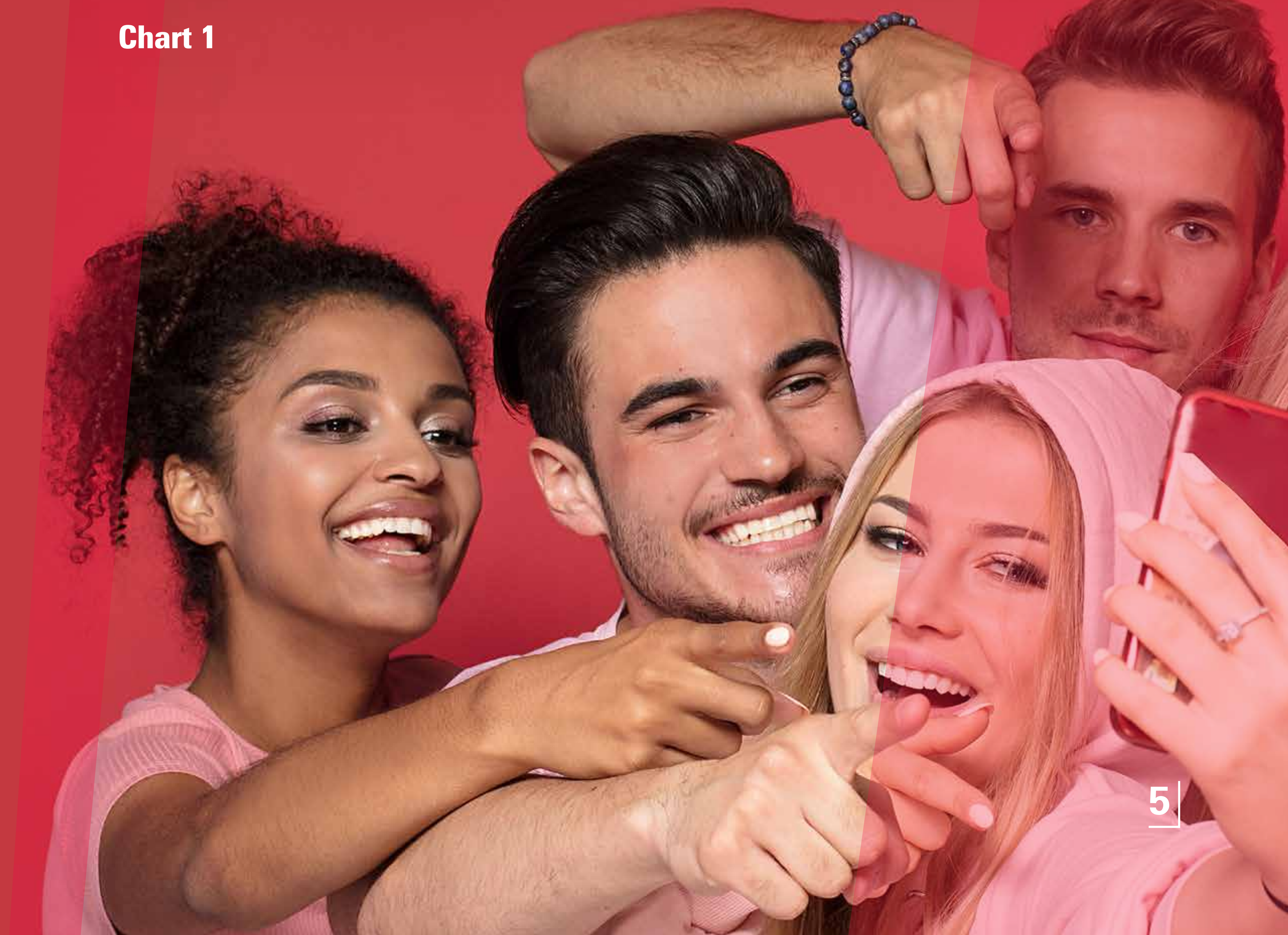


Chart 1



DIGITAL LIFE FOR DIGITAL NATIVES

Key findings from our Youth Trends report show that Gen Z is the biggest consumer of social media compared with any other generation[17]. The age group 16 to 24-year-olds use an average of 8.4 social networking sites (SNSs)[18], and most use mobile phones to access them[19].

The 'information age', social media has given audiences a more active role in communication and more power to choose which brands they engage with online. The education sector, like all others, has adapted to this shift. Universities now have social media profiles on Facebook, Twitter, and Instagram, and advertise to their target cohorts on these same platforms. Communication is now a two-way street, as audiences engage with brands through new mediated channels.

To impress audiences with your organic and authentic profiles, include some user-generated content (UGC) created by current or past students. 90% of consumers find UGC helpful when making purchase decisions, and this content is easy to control and distribute amongst various SNSs[20].

Social media sites are full of opportunity

Some countries present themselves as great targets for social media advertising. Nigeria sends the third highest number of non-EU students to the UK[16], while simultaneously spending the most amount of time on social media each day[21]. India, the second largest provider of international students[16], also spends more time on social media than the global average[21].

It is clear a one-size-fits-all approach will not take advantage of the differences between regional uses of social media or recognise areas where top SNSs may not be successful.

This report will go on to specify which social media platforms are best to use in each geographical region, so that we can identify the best strategy for targeting candidates for international study in the UK.

THE PLATFORMS TO WATCH

FACEBOOK

Facebook needs no introduction, belonging to the recently renamed Meta corporation that also owns Instagram, WhatsApp, and Messenger. Facebook is the largest social network worldwide, with an overall monthly penetration of nearly 3 billion[22].

Users aged between 18 and 24-years-old account for 22.4% of Facebook's advertising reach, and the platform is ranked as the most 'active' SNS[22]. As shown by chart 2, India has the largest userbase at 339.8 million, followed by the USA at 180.1 million.

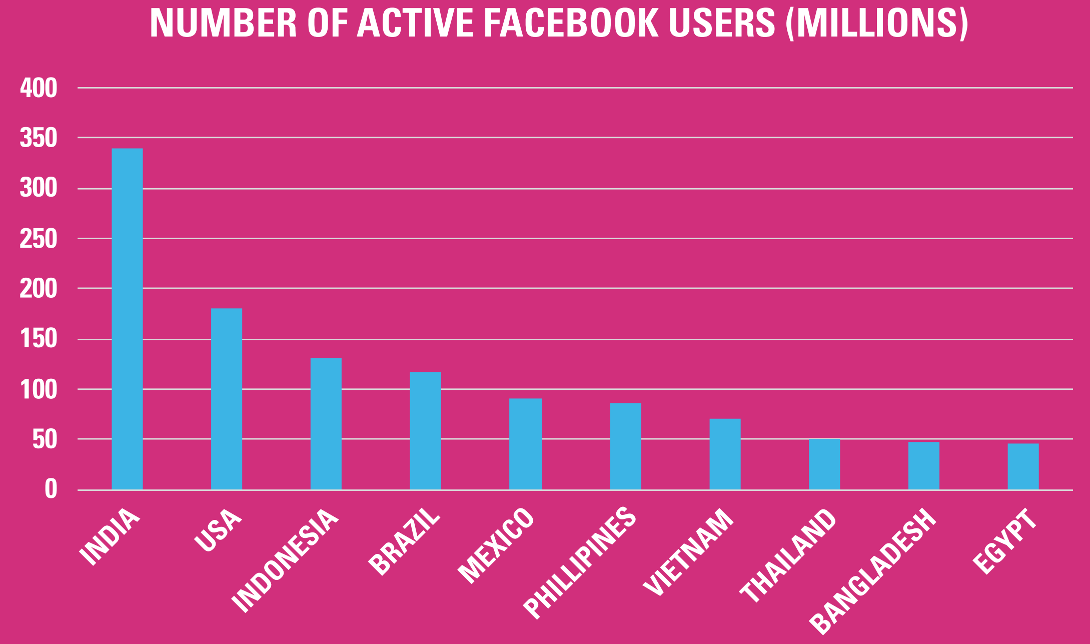


Chart 2

Does Facebook really allow targeted advertising anymore?

The high reach of Facebook suggests that it has a lot of opportunity for reaching international candidates. However, in 2021, Meta restricted targeted advertising so that we can only target users older than 18. Furthermore, we cannot filter our audience by race, sexuality, courses they study, and other important elements[23].

As a result, we have much more limited selections for interest or data targeting, and this reduces Meta's viability as an advertising platform. TikTok, Snapchat, YouTube, and other programmatic media platforms are therefore becoming more attractive options for reaching youth cohorts.

INSTAGRAM

Instagram is still seeing a surge in popularity and currently boasts 1.4 billion monthly active users, of which 30% are aged between 18 and 24[24]. Instagram is a great opportunity for brands to connect with youth cohorts since business profiles are visited 200 million times a day[25].

Chart 3 shows that Instagram is most popular in India with 230.3 million users, followed by the USA and Brazil[24]. However, residents of Turkey spend the most time on the platform each day, totalling 20.2 hours each month[24].

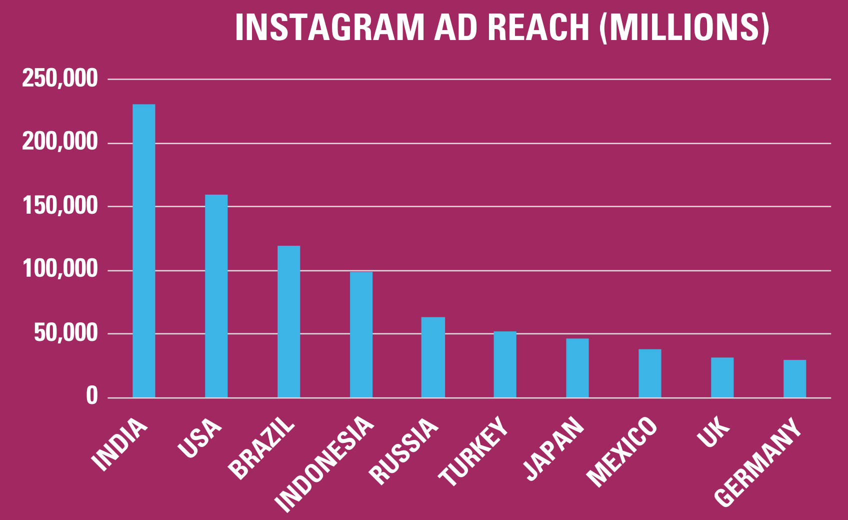


Chart 3

Instagram shows a lot of promise for higher education profiles. Per post, the higher education industry has an engagement rate of 2.99%[26]. When compared to other industries shown in chart 4 this is very high.

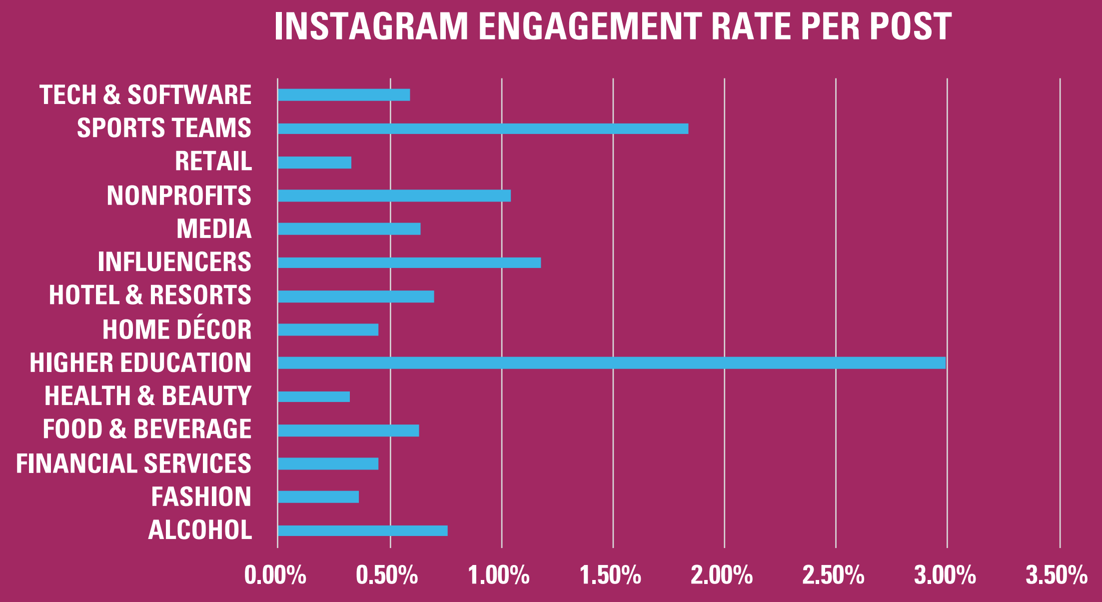


Chart 4

Instagram is owned by Meta though, so the same advertising restrictions from Facebook apply here too.

TIKTOK

TikTok has seen record-breaking success over recent years, particularly with youth cohorts. 62% of its userbase are under 29-years-old[27]. It also has a unique ability to influence audiences, who spend more through the app than YouTube and Tinder[28].

TikTok's 'For You' page algorithm shows its users content based on themes that they enjoy, rather than content from their current social networks. This allows influencers who stick to their 'niche' to become successful and gives brands the ability to reach specific communities through interest-based targeting.

TikTok's advertising audience reaches its highest in the USA, followed by Indonesia and Brazil[28]. TikTok is banned in India and Afghanistan however, so these countries cannot be reached on this platform. Universities should bare this in mind if either of these countries become an important source of students[29].

The hours spent on TikTok are quite impressive and vary by country. Since advertising audiences are strongest in the USA, Indonesia, and Brazil, many of these also spend a lot of time on the app[28], as shown in Chart 5.

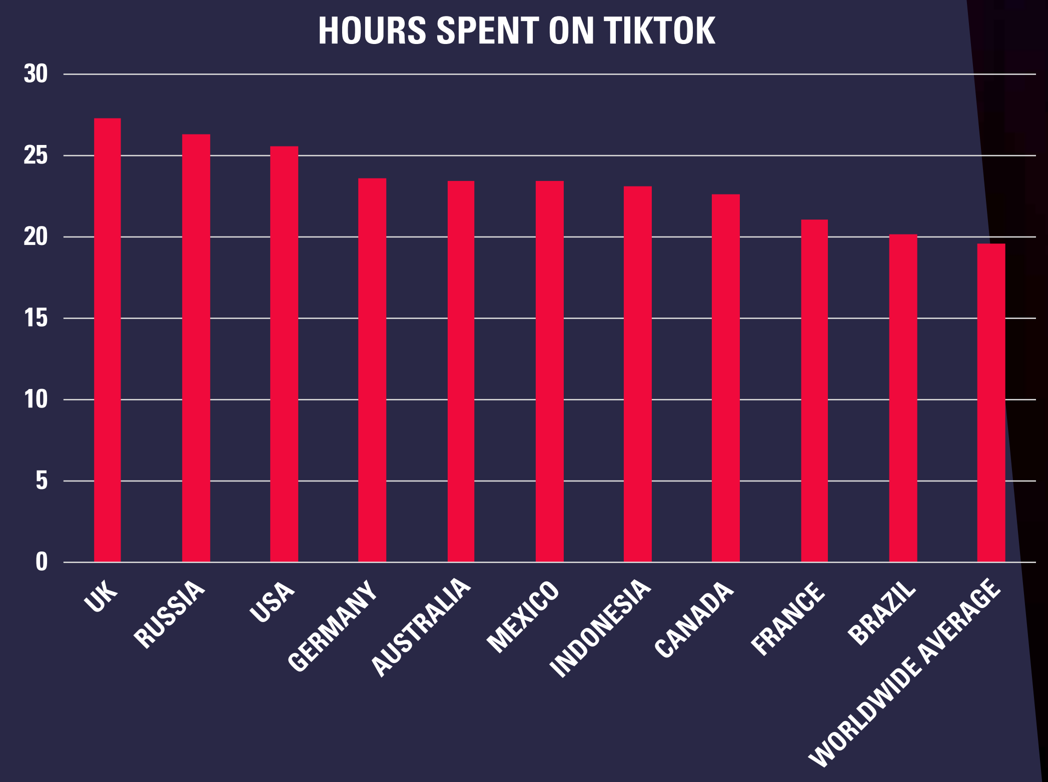


Chart 5

YOUTUBE

YouTube is an important social media platform to Gen Z. 37% of users aged between 18 and 34-years-old report that they binge-watch on the site daily[30]. India is the largest advertisable location demographic, comprising of 467 million users that we can reach[31].

Some of the audience is unavailable to advertise to, because of YouTube Premium. Currently, 23.6 million people pay for this subscription[30], which removes ads from videos. Nevertheless, general usage numbers are so high that this small population will not really alter your reach. This is particularly true for the US, where 95% of 18 to 29-year-olds use the platform[30].

YouTube benefitted from the Covid-19 lockdowns, as more people stayed at home. These lockdowns sped up the shift in content preference towards video and away from text-based platforms, which has also served TikTok particularly well. It is predicted that by the end of 2022, video will have a worldwide reach of around 92%, and account for 82% of all internet traffic[32].

To demonstrate how YouTube's popularity is outrunning other platforms, Chart 6 shows the most visited websites[31].

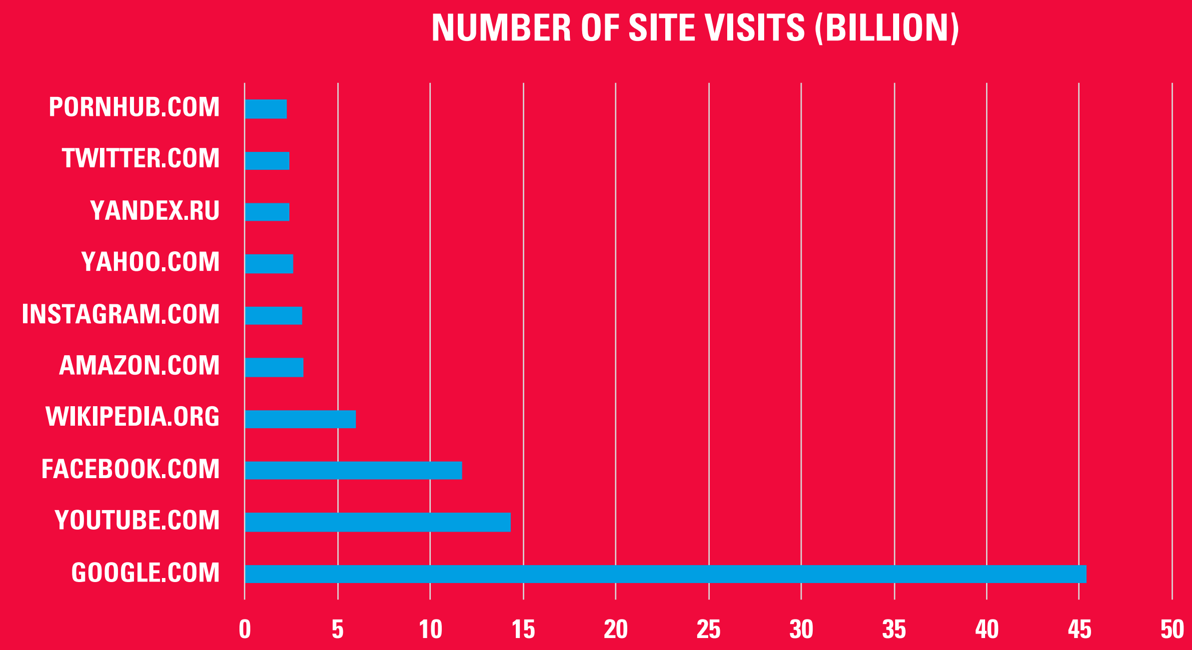


Chart 6

Influencers are prolific on this platform. UCAS's[33] Student Lifestyle report found that amongst first year university students top 10 influencers, almost all 10 'found their fame' on YouTube. It is therefore a great platform for sponsored content and could be a useful tool for sharing UGC.

For more information on the above platforms and their use amongst domestic students, please read our 2022 Youth Trends report.

VIDEO IS ON A ROLLERCOASTER THAT ONLY GOES UP

Since the global average of time spent watching video is at 84 minutes a day, the viewing hours of this format are incredibly high[34]. Snapchat[3] finds that Gen Z enjoy more dynamic content because it is a more expressive form of visual communication.

Brands have tried to take this trend on board, but video is difficult to develop. Chart 7 shows that 88% of businesses now use video as a marketing tool[35], however 43% say their lack of in-house skill and budget create barriers to fully exploring the format[36].

BUSINESS USE OF VIDEO AS A MARKETING TOOL

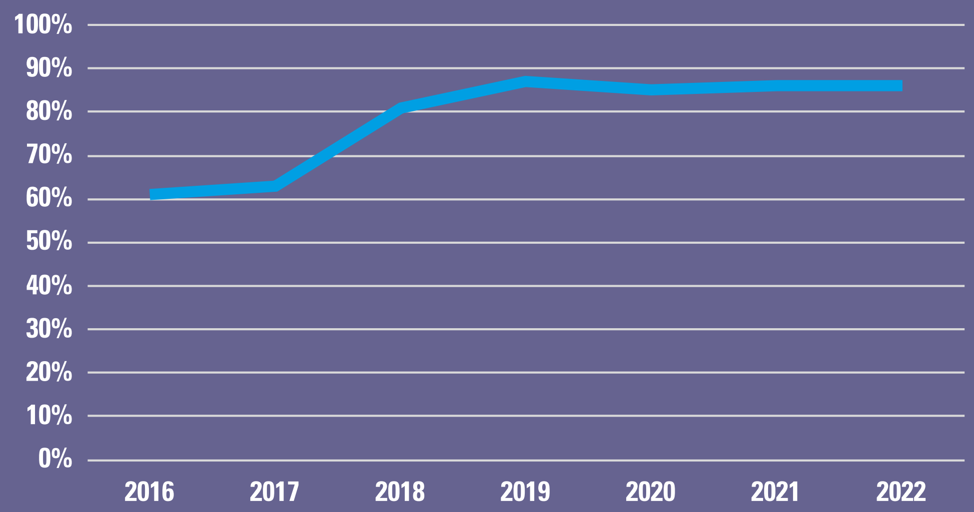


Chart 7

TYPES OF CONTENT CREATED BY BUSINESSES

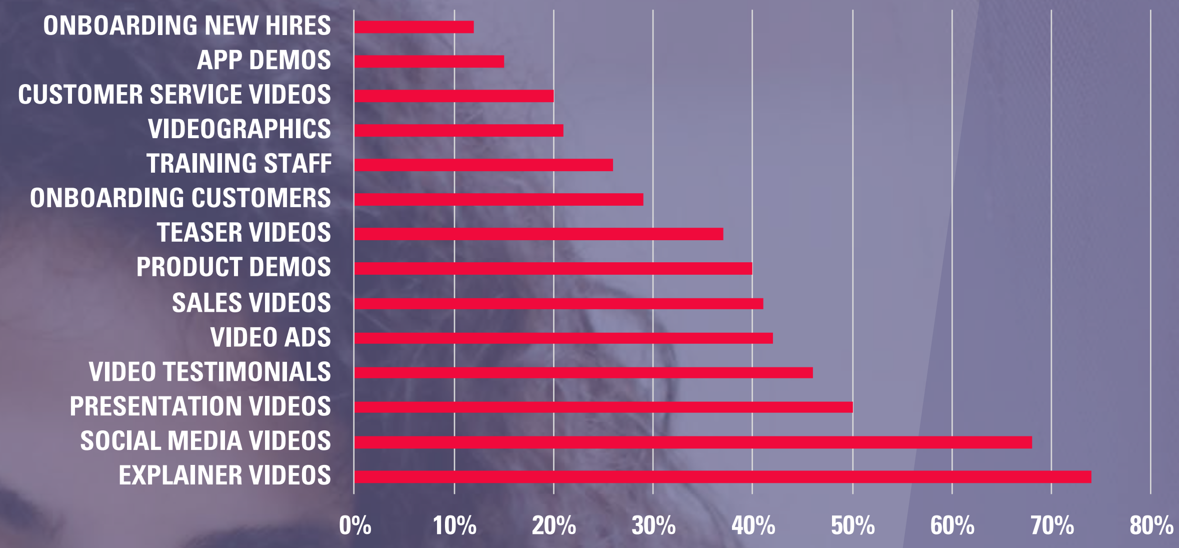


Chart 8

Chart 8 shows the most popular types of videos created by organisations, with an educational form coming in highest. This shows there is opportunity for universities to get involved with current trends and create successful content.

Make sure your content is desktop friendly, however. 87% of business-related videos are viewed on this device[32].

ON THE WEB

88% of consumers say that authenticity is important for brands[37], and Snapchat[3] finds that its young user base also value authenticity highly. Building a website that is transparent and has consistent messaging is therefore essential for attracting students.

It only takes 0.05 seconds for people to form an opinion about your website[37], so once you've driven your traffic here it should be impressive. You can expect more website traffic if your organic social media profiles are successful – 47% of people who follow organisations on SNSs will visit their website[38].

A brand website should also be easy to find. 68% of all online experiences begin with the use of a search engine[39]. Time spent online has increased since the Coronavirus pandemic, so now is the perfect time to draw audiences in with search and display ads.

An essential statistic to remember is that the top website to come up in a Google search has an average click-through rate of 32%, and 75% never get past the page of listings[39]. It's essential for brands to get high placements, so search engine optimisation (SEO) should be a priority in the digital mediascape.

SEO, BUT ON WHICH SEARCH ENGINES?

Unsurprisingly, the search engine market is dominated by Google. With a global market share of 91.9%[40], small budgets are likely to disregard all other platforms. However, the online population currently stands at 5 billion[41], so 405 million people are using other search engines such as Bing.

Google advertising is particularly successful; research finds that people are four times more likely to click on Google ads than on any other advertisement network[42]. Depending on the industry, the cost per click (CPC) of ads will range between an average of 96p and £5.70[43]. The education sector currently has a click-through rate of 6.2%, and as chart 9 shows, a CPC rate of £3.94[43].

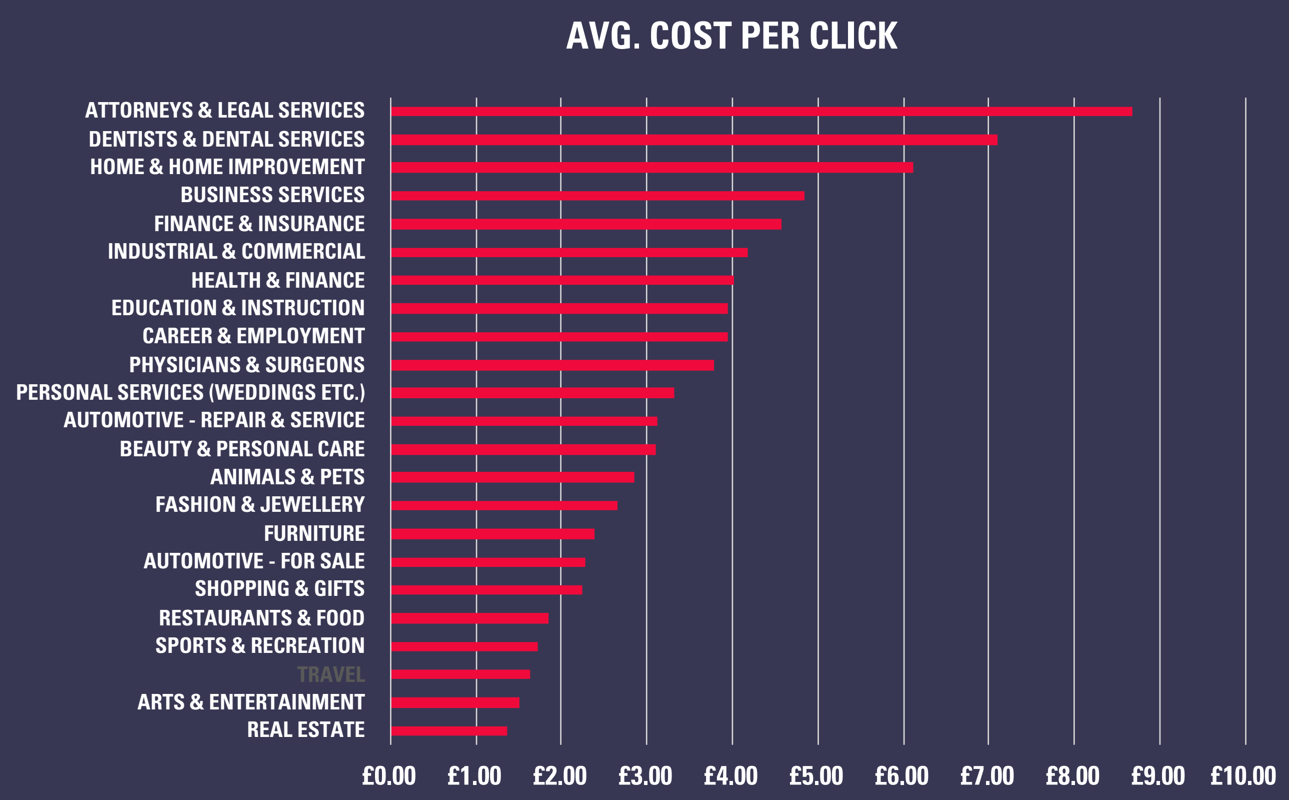


Chart 9

The geographic location that you are advertising in will impact the cost of your campaign. Countries with a lower CPC include Ukraine, China, Namibia and Pakistan[44]. Countries with a much higher CPC are Australia, Brazil, United Arab Emirates, and the United States[44].

This highlights a few countries where CPC advertising might yield great results. Pakistan and Nigeria provided 12,975 and 21,305 students respectively in 2020/21 and have a low CPC[16, 44]. As previously mentioned, Nigeria spends the most time on social media too[21], so the low CPC and high enrolment rates again suggest that it is a great location to focus international advertising resources.

WHAT ABOUT OTHER SEARCH ENGINES?

Bing has a global market share of 3.2% and has over a billion visits each month[45]. We like to consider Bing in our advertising campaigns because it reaches an audience that other campaigns may not, such as in China, North America, and parts of Asia.

Some regions, as this report will point out later, use more specific, localised search engines rather than Google. Yandex is very successful in Russia, owning more than 47% of the market share[46]. Although Google still beats Yandex in this country, all advertising has been suspended there due to the ongoing invasion of Ukraine[47].

Using different or regional search engines could be a successful tactic for naturally filtering down advertising to specific audiences. Bing, Yahoo!, and AOL all belong to Microsoft, so when you advertise on one, you advertise on all three. It has been reported that Bing Ads also reach 63 million searchers that Google AdWords can't[48], so this is a large market to miss out on.

Bing is also considerably cheaper due to a lack of competition. One company found that the average CPC for Google Ads is as much as triple that of Bing Ads[50]. Using smaller or more localised search engines may therefore reach a market that other brands are not thinking about, for a lower price.

EUROPE
CLOSE TO HOME BUT FAR FROM REACH

In the academic year 2020/21, Europe sent 38,110 new, full-time, undergraduate students to the UK to study[16]. This is an increase of 2,530 on last year's figures. In total, Europe accounts for 152,905 international students currently in the UK[16]. This is 25.3% of all international students.

The data we use to determine how many students attend from each region is in the following chart[16]:

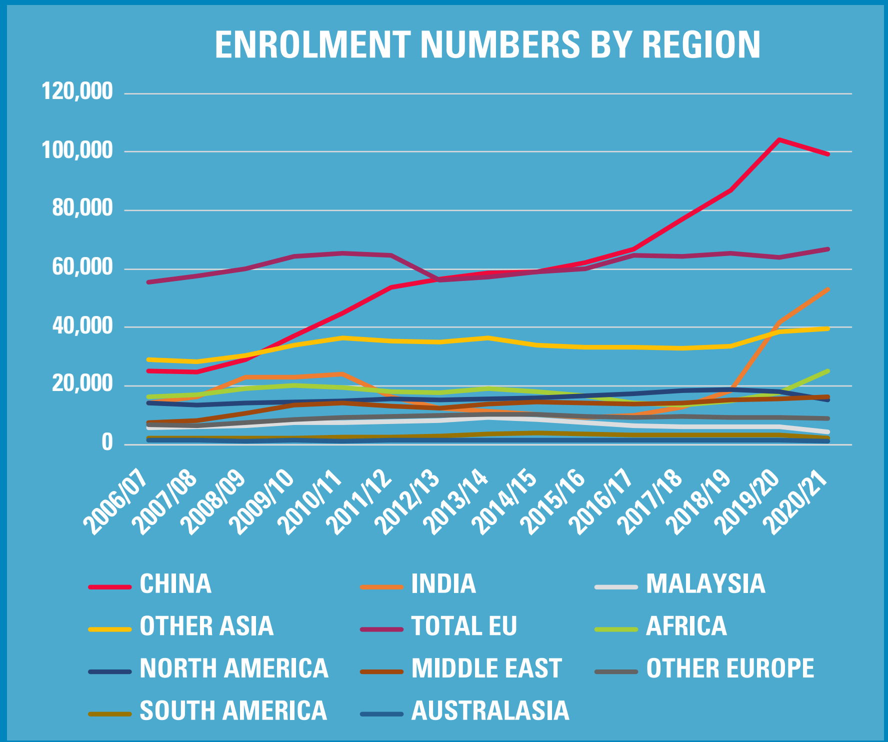


Chart 10

The table below (chart 11) shows the number of EU students starting their full-time undergraduate studies in the UK over 5 years. Aside from a decrease in the year 2017/18, it has mostly been on a slow increase.

The increase has been much steeper for non-EU students, but with a drop in the year 2020/21. This is likely a result of new Brexit fee implications and the Coronavirus pandemic. European countries

Chart 11 — Non-UK enrolments

Year	European Union	Non-European Union	Total Non-UK	Not known	Total
2016/17	33,030	62,590	95,620	0	558,395
2017/18	32,780	65,670	98,450	0	563,645
2018/19	34,740	69,970	104,710	5	569,715
2019/20	35,580	84,460	120,035	160	594,850
2020/21	38,110	79,715	117,825	35	633,745

According to data from HESA[16], the top EU international student providers currently include Italy, France, and Romania. Looking more closely, we can see that numbers from Romania have had a huge increase since 2017, while Germany's have fallen.

Top social media platforms for Europe

Compared with last year, Facebook, Instagram, and Reddit have seen increases in market share. In contrast, Twitter, Pinterest, YouTube, and Tumblr have experienced a decrease[51]. We warn against using market share to determine the best sites for advertising, however. TikTok is a popular platform in Western Europe and especially amongst our target age demographic, even though it isn't in the top six social media platforms for market share[52].

The European Union recently agreed to combat misinformation, divisive content and targeted advertising on Meta and Google platforms in its new Digital Services Act[53]. This reinforced Meta's reduction of filters based on a user's ethnicity, religion, or sexual orientation. While these elements are not necessarily important in a higher education advertising campaign,it makes us more hesitant to use these platforms.

Europe in general is not a big region for spending time on social media - every country falls below the world average. Furthermore, when using social media for brand research, only Poland is somewhat notable for doing this[41]. This shows that European target audiences may be hard to reach or impress on social media.

Unsurprising search engine use in Europe

Google continues to have the highest search engine market share at 91.9%[54]. Bing's market share has increased in recent years to 3.9%, which shows upcoming opportunity for Bing Ads in the future[54].

YANDEX has a small share of 1.75% but does represent many Russian-speaking Europeans[54]. This could be a possibility when targeting areas such as Ukraine or the Baltic states.

On Google Trends[55] we can see that for Europe's largest provider of international students, Italy, the search term 'University UK' hits its highest peak around the end of the calendar year. However, for France, the peak is at the beginning of May, and for Romania this is the end of June to beginning of July.

Any campaigns that are targeting specific countries within Europe should use a tailored time-sensitive approach to reach the largest number of candidates. European countries tend to have an average cost for CPC campaigns, but Italy and Germany are the most expensive.

AFRICA
HAKUNA MATATA

Africa sent an increased number of students in the academic year 2020/21 compared to the previous year. This totals to 25,220, of which 21,305 are from Nigeria[16]. In the last 14 years student numbers from this demographic have fluctuated between 14,000 and 20,000, but recently appear to be on the rise.

Unfortunately, outside of Africa's well-connected cities are some of the world's least literate countries. The relationship between poverty and education is well documented, and the top ten least literate countries globally are all in Africa[56].

As the world's second largest continent, it can be expected that as more areas make it out of poverty, more people will get access to the level of education that can prepare them for universities in the UK.

Despite its economic background, Africa is an important location for international students

Nigeria has been highlighted as a priority market by the International Education Strategy update[2], indicating it is an important source of international students for the UK. Nigerian residents also spend the most time on social media worldwide. Social media is therefore going to be a big part of any advertising strategy in this part of Africa.

QS[2] finds that Nigerian students are most concerned about how welcoming UK universities are and are drawn to universities that have large international student communities. Furthermore, a university's graduate employment rate, and the ability to connect with other international students is becoming more important to this student cohort2.

Due to the financial issues that many African students face, they will also be looking for universities that offer great scholarship programmes and bursaries. If your university is able to provide this, then this is a great selling point for you.

Social media use, and why there is opportunity to get involved with its growth

Facebook remains the most popular SNS, and Instagram, LinkedIn, and YouTube have all moved up a place in the ranks since last year[57]. Facebook has actually seen a 20% increase in the last year too – so this platform seems to be a safe option for reaching African students. Twitter has seen a notable drop from 18.3% to 2.8%, so it may be a good idea to stay away this year.

Datareportal[41] points out that the median age in many parts of Africa may contribute to the limited online connectivity of the continent, since several countries' median populations are very young. In the Central African Republic, many residents are yet to have access to basic sanitation and only around 1 in 7 have electricity[41]. Africa also accounts for 16 of the bottom 20 countries for internet adoption rates[41].

Since African countries tend to have a limited voice on the internet, many believe that growth in the technology and social media sector is important for changing the online narrative surrounding the continent[58]. To show support and a welcoming attitude, universities may want to get involved in expanding the reach of African content creators and their stories.

An example of a great African content creator is YouTuber Wode Maya[59]. He has nearly 1.2 million subscribers and is on a mission to inspire Africans and share his experiences in his home continent.

YouTuber Wode Maya

Search engine market share – Google is even more popular than usual

Google should be prioritised when using search engines to advertise to the African target demographic. The other top five search engines only have between 0.1% and 2.9% market share[60]. This makes it not particularly worth investing money elsewhere, since this advertising will reach much fewer students.

Internet use by population number varies greatly between each country. Unsurprisingly Nigeria comes top here. Other digitally fluent areas include Egypt, South Africa, Morocco, and Ethiopia[61].

Money spent on advertising in African areas like Tanzania, Namibia, and Morocco will go a lot further when compared with more expensive markets like the USA or UAE[44]. This is because the average cost per click and competition for key words is much lower. However, these countries are not an option yet as application numbers from these areas remain very low.

Morocco could be a country to expand into in the future, however. Although it currently has unimpressive enrolment numbers, there are several websites and businesses that are encouraging international study in the UK[6].

ASIA
MINUS CHINA

In the academic year 2020/21, Asia sent 96,755 students. When including China, this number more than doubles to 195,915[16]. This report goes into further detail on China in the next section.

The biggest source for Asian international students (excluding China) is India, which in this year sent 53,015. This is an amazing increase from 12,820 students in 2017/18[16]. As a result, India has been highlighted as a key target demographic for universities this year, alongside Vietnam and Indonesia[2].

Financial concerns are at the top of the list for India, Vietnam, and Indonesia[2]. This suggests that most of Asia share the same worries regarding international study. Vietnamese and Indonesian students also consider the availability of scholarships as important when making their choices, further showing how fees may be affecting their higher education decisions[2]. If you are advertising to the Asian region you may want to reassure these concerns to make an impression with larger numbers of students.

Surprisingly, when researching UK universities, Indonesia, Vietnam and India have different priorities. Indonesian students search for information about accommodation, Indian students look for placements and links with the industry, and Vietnamese students value connections with alumni and information about staff members and lecturers[2].

It is certainly worth considering tailoring your advertising approach to target these areas if you are specifically trying to reach them.

Social media usage in a key region

2.13 billion Asia-Pacific region residents will visit a SNS at least once a month this year, making up 60% of the total online population[62]. However, growth in social media usage in Asia has slowed down in the most recent years.

TikTok presents itself as a viable social media option, since ad reach is particularly high in Thailand, Malaysia, Cambodia, and Vietnam[41]. However, TikTok is banned in India so it isn't useful in this key country. YouTube may be successful in areas like Singapore and Malaysia since ad reach rate is at 88% and 81% respectively[41].

In terms of market share, Facebook holds the majority[63]. However, in Asia it has a considerably lower market share (66%) when compared with regions like Europe and Africa[51, 57]. YouTube has a market share of 12.2% but may present better advertising opportunities since it is a much more popular social media amongst university students[33].

Social media trends to get on board with

UGC is particularly successful here and should be incorporated into campaigns. Asian consumers appreciate genuine testimonials of brands that show users' personal experiences, and enjoy short video formats[64].

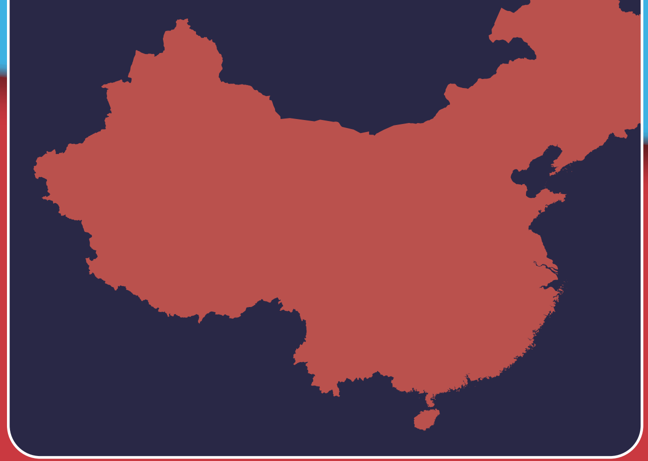
Podcasts are also looking promising, as social audio content is expected to become a new trend in Asia[64]. Investing in advertising here, by using platforms like Spotify, might help reach an audience that others may not have considered just yet.

Search engine use and the internet – Asia is 'finnicky'

Unlike the findings on China later in this report, Google has a high market share in Asia at 92.4%. This is followed by Yandex (2.4%) and Baidu (1.6%)[65]. Bing is also still relevant in the Asian market, depending on the area.

The Philippines, Malaysia, Thailand, Indonesia, Singapore and India all spent more time online than the global average[41], which is promising for advertisers looking to reach the market via search and display ads.

South Korea, much like China, has slightly different statistics. Naver has over 15% market share, and is mostly unique to the South Korean market[66]. Naver is very different to Google, even using its own payment system and search advertising platform (Naver Ad). This advertising platform has different languages, location targeting, character limits, and keyword tools from Google Ads, but if South Korea is a market you want to get involved with then it's worth getting familiar with the search engine.



CHINA
NOT YOUR AVERAGE TARGET DEMOGRAPHIC

China is the biggest provider of international students, even when compared with numbers from entire continents, HESA[16] finds. For the academic year 2020/21, China sent around 99,160 new students to the UK[16]. This is a decrease of 5,080 from last years' numbers, and one of only a few regions to have seen a drop.

Unsurprisingly, China has also been highlighted by the International Education Strategy Update UK as a priority market for international students. For this reason, and because China is so different from its neighbouring countries, we have separated the country from its Asian region.

For Chinese students, quality of teaching and university reputation continue to be top priorities[2]. Common concerns amongst this cohort include safety, specifically relating to violence and discrimination[2], as shown in chart 12.

Reassurances should be communicated in advertising campaigns to alleviate these concerns, according to QS's[2] International Student Survey Report. Highlighting additional support services could also be a worthwhile tactic.

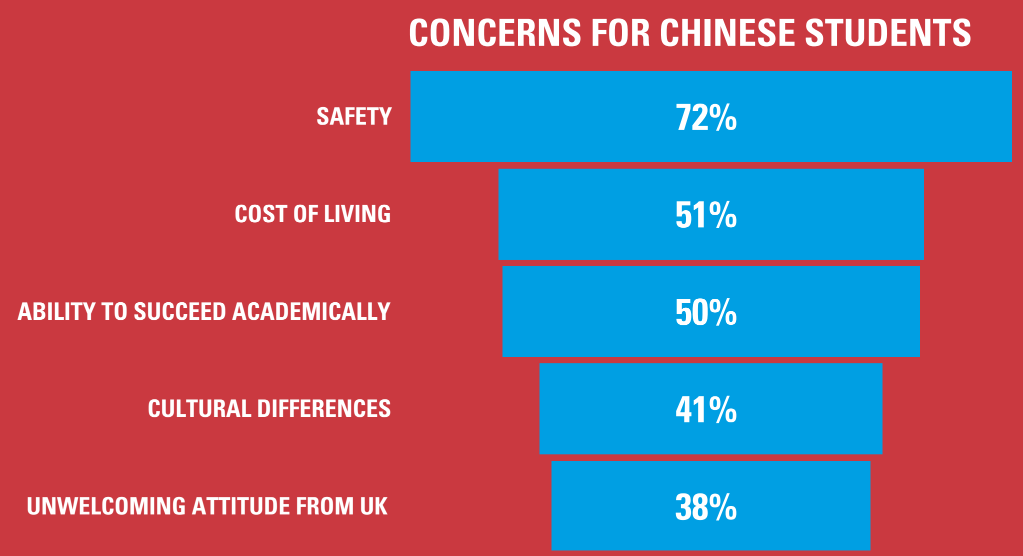


Chart 12

Social media popularity - #blocked

The student market in China is difficult to advertise to. Social media platforms like Facebook, Twitter, Instagram, Snapchat, and YouTube are blocked here, so the usual digital strategies won't reach the same numbers that they might in the rest of Asia.

However, despite these sites being blocked, the top six for market share are: Twitter, Pinterest, Facebook, YouTube, VKontakte, and Instagram[67] (shown in chart 13). This is due to the increasing use of VPNs by Chinese audiences. However, we still cannot target this demographic due to these blocks.

Interestingly, when compared with last year's statistics, Sina Weibo, Reddit and Youku have fallen out of the top six. Reddit's trajectory has been particularly chaotic, reaching its peak in October 2021 with a market share of 65.6% and now sitting at 2.6% in June 2022.

To compare these two years, chart 14 demonstrates social media usage from 2021. The huge differences suggest that it would be difficult to follow media trends based on market share here, since they change so drastically and so often.

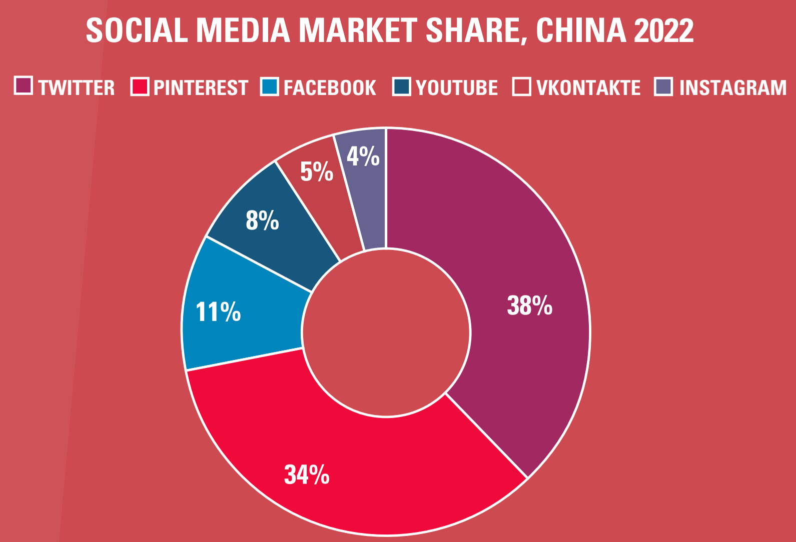


Chart 13

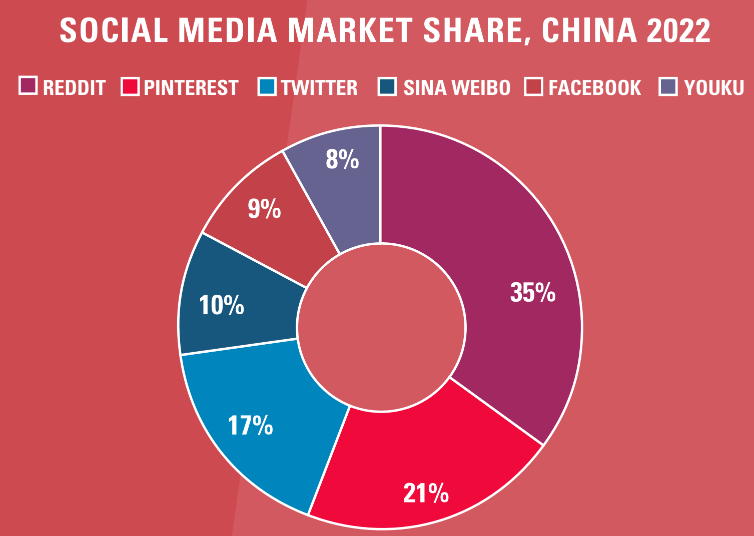


Chart 14

Unsurprisingly, TikTok is highly successful in China. TikTok is also becoming a useful tool for advertising to youth cohorts since it is most popular amongst this demographic and a great way to incorporate influencer marketing into campaigns. Currently, China accounts for about 80% of TikTok's total revenue[64], so this is a key social media to use in future advertising efforts with a Chinese target demographic.

VKontakte is primarily a Russian social networking site. It could be assumed that this is popular in this region because China is one of only a few countries that have not condemned the Russia-Ukraine War. They also share a border that spans 4,209 kilometers, so there is understandably some crossover in internet use.

We would advise against using any Russian SNSs for advertisement due to the number of sanctions the UK has placed on Russia because of this war.

Search Engine Market Share Amongst the Biggest Source of Internet Users

China accounted for 1.02 billion internet users in January 2022[68]. This is nearly 13% of the entire world population, and more than 20% of the word's online population. So which search engines are they using? Again, China is very different when compared with other regions.

Baidu remains the most popular of them all, standing at 75.5% of the market share[69]. This is followed by Bing at 11.5%, which corroborates our earlier statement that this search engine should not be forgotten about in international advertising efforts. In fact, Bing's market share has increased by more than 8% in the last year, so it is becoming more of an opportunity for reaching this region.

Google, usually the dominator of all search engines, only has 3.6% market share in China. Although businesses may be tempted to use Google Ads and Search Ads across the board, this will not be appropriate here. Since China is such a huge source of international students, bespoke advertising plans are needed to reach your target locations.

In the last academic year, 16,280 students came to study in the UK from the Middle East region[16]. This is not unusual – numbers have not changed much in the last 15 years. Nevertheless, Saudi Arabia is an important market for international students[2].

The Middle East has a strong history of sending students overseas, especially to countries like the USA, Canada, and the UK. Subject search demands are highest in the UK in February, March, April and May[70], so this is when search and display advertising will be most effective.

However, Rohan Rego, Associate Director at IDP Education, suggests that relationships should be built by adverts over time, rather than just in the busy periods[70]. Cities in the Middle East that have the highest search demand for the UK include Riyadh, Jeddah, Kuwait City and Dubai[70]. If you are considering using OOH advertising to reinforce online efforts, these cities would be sensible choices.

Social media usage – how Arab culture is altering your advertising audience

Social media is very popular in the Middle East, particularly in Saudi Arabia, the UAE, Turkey, and Israel. The UAE in particular has a much higher than average daily time spent online[41].

The UAE also has a 99% internet penetration rate, but numbers may be even higher than this[71]. YouTube is particularly successful and has an advertising reach of 90.3%[71], suggesting that this platform may be the most useful when targeting this demographic. Twitter only has an ad reach of 24.7%, so we advise against this platform.

Use of social media is a bit lower in Saudi Arabia, but remains the primary way to reach youth cohorts. It is worth noting a large difference in gender use of social media in the Middle East, since males account for between 60% and 70% of the ad audience on most SNSs[71,72]. This digital divide has been attributed to gender inequalities in Arab countries where women are much more likely to be disadvantaged members of society[73].

Arab culture in this region therefore really directs social media advertising towards men and away from women. The Middle East's digital divide does help in some ways though, since youth cohorts are much more prolific on SNSs than older members of the population who do not fit the undergraduate and postgraduate age demographic.

Search engine and internet use in a segmented society

Google has the highest market share of all search engines at 96.1%, followed by Bing with just under 3%[74]. Google should again be prioritised since it will reach most of the online population.

An awareness of Arab tradition and culture will enhance your content and improve brand trust, creating a deeper emotional connection by showing an openness towards international students[75]. Showing prospective students that they will be safe will reassure 76% of the Saudi Arabian population who are concerned about this[2].

CPC is very expensive in some Middle Eastern countries. The UAE has the highest CPC of any area worldwide, and Turkey is also quite expensive[44]. However other areas like Kuwait and Saudi Arabia are more reasonable[44]. It is worth researching these different costs when allocating budgets to specific areas of interest, since there is such variance across the region.

Internet penetration in the Middle East is currently at around 75% and is highest in areas like Qatar, the UAE, and Kuwait, however areas such as Yemen have as low as 25%[76]. The economic situation of the country clearly has a huge effect on internet penetration. Since this is likely to affect international student application numbers in a similar way, we can assume that key populations are residing in areas with better usage rates.

AUSTRALASIA
DON'T BE A DRONGO

Australasia is the smallest contributor of international students, sending only 1,190 in the year 2020/21. Considering there is less of a culture shock for these areas due to sharing the same language, it seems strange that so few come to the UK for study.

In these countries, the UK is in competition with China, Italy, Japan, and the USA[77]. But most students prefer to study at home, seemingly reluctant to gain international experience[78].

Australia is more of a competitor than a source for international students. Strict Covid-19 guidelines meant that very few people were allowed in and out of the country over the last two years. However, Australia opened its borders in February 2022, so students who were previously unable to consider the area for study can now apply.

It seems that with consistently low numbers of international students in the UK, combined with a high CPC rate[44], Australasia is not worth much advertising budget. Instead, strong social media profiles may do enough to bring in the few students who want to study in the UK to your university.

Saying g'day on social media

Facebook has a surprisingly weak market share when compared with other regions. Other social media platforms like Twitter and Instagram therefore pick up some of the slack[79]. YouTube has a high advertising reach in both New Zealand and Australia, so if you want to advertise to this audience, this may be the right platform for you[41].

In terms of developing your social media profiles to attract students organically, TikTok may get the attention of Australian users, who spend the 5th highest amount of time on the platform worldwide[41]. However, ad reach rate for TikTok is low for Australasia, so avoid it in advertising tactics.

YouTube is also popular for general use amongst Australian audiences. They spend on average 12 hours a week here, compared with 8 hours a week for Facebook[80]. Since most videos on YouTube have some form of unskippable ad, this exposes your audiences to your content much more than Facebook, where users can scroll past with ease.

Australasia is probably not a good option for search and display ads

Bing has nearly 5% of the market share but this is still a long way from the likes of Google[81]. Not that these statistics matter all that much – as previously mentioned, Australasian age demographics are not that interested in international study and therefore do not search for UK universities often compared with areas like Africa and China[78].

Most university searches for higher education relate to Sydney, Melbourne or Canberra, the preferred options for Australian students[78]. Perhaps the different academic timetable also provides a barrier to international education. Australia and New Zealand both start the academic year in January, whereas almost all other areas worldwide begin in September.

Australasian countries are below the global average for time spent online, spending around half an hour less each day on the internet[41]. This again supports the idea that this region is not an accessible market for international students.

NORTH AMERICA
SISTER FROM ANOTHER MISTER

North Americans accounted for 15,230 international students in the academic year 2020/21[16]. In the last two years, these numbers have been slowly decreasing. We could blame Covid-19 for this, but that wouldn't explain why numbers in EU, India, Asia, Africa, and the Middle East all increased.

Like Australasia, North America is more of a competitor for international students than a source for the UK. Although application rates for these students are slowly declining in the US, they still have the highest number of enrolments. The US received 340,000 students from China alone in 2019[82].

Priority markets for the US are slightly different; there is a focus on China, South Korea, Brazil, India, and Canada[82]. The UK highlights China, Indonesia, Saudi Arabia, India, Nigeria, and Vietnam instead[82].

The social media age

Many of the top social media platforms originated in North America, including the most famous of all, Facebook. Although Facebook has a high market share, other platforms like Twitter, Pinterest, and Instagram share around 25% between them[83].

TikTok is also experiencing success, and figures from Bytedance suggest that more than 50% of all adults aged 18 and above in the United States and Mexico use it[84]. Other research, as shown in chart 15 finds that 48% of adults aged 18-29 use TikTok[85]. Canada hasn't taken to it quite so well, but TikTok still has a good advertising reach of more than 36%, considering the young age of the SNS[84]. The USA, Mexico and Canada all spend more than 22 hours a month on the app, which is 3 hours more than the global average[84].

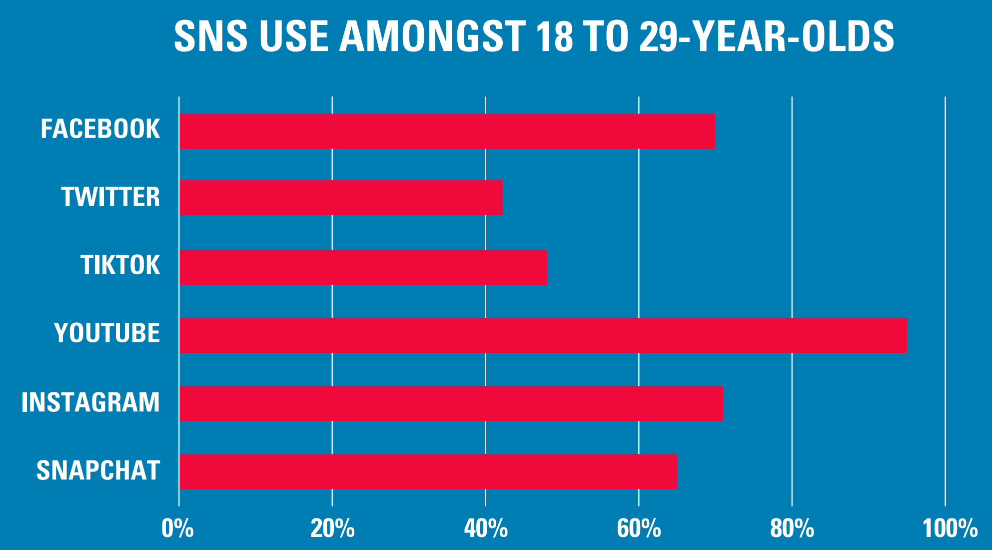


Chart 15

YouTube also has an outstanding reach in Canada, and in North America as a whole[41]. The chart above also demonstrates this, showing that 95% of young adults use the platform[85]. This is more than any other SNS.

This is followed by Instagram, with a usage rate of 71%[85]. Social media really is the place to be if you want to reach North American students. Snapchat is also one you shouldn't forget about. It has an overwhelmingly young audience, naturally providing an appropriate userbase for higher education institutions to advertise too.

Facebook is the only SNS where 18 to 29-year-olds are not the biggest users of the platform[85], which again goes to show that its popularity is dwindling. As we have previously mentioned, YouTube provides universities with a great space for organic content and advertisements. The fact it is so successful in this region suggests that UK universities should seriously consider using the platform instead of Facebook when aiming for this target market.

Is it worth advertising to this market?

Unfortunately, the CPC in North America is very high. The USA has a particularly high cost and is only just cheaper than the UAE[44]. Organic content may provide more of an opportunity to reach prospective students if universities can get enough exposure through this route.

Chart 10, created with HESA data, shows that the USA is not near the top for our international numbers. Things look more hopeful in chart 16, using data from UNESCO[86], which shows where the USA sends the most students. As you can see, the UK is actually in first place, in front of other North American countries like Mexico and Canada.

Social media popularity amongst smaller areas within North America, such as the Caribbean Islands, is much harder to determine. However, these countries provide such a small number of international students each year to the UK that they might not be worth advertising to when budgets can be spent in more profitable regions.

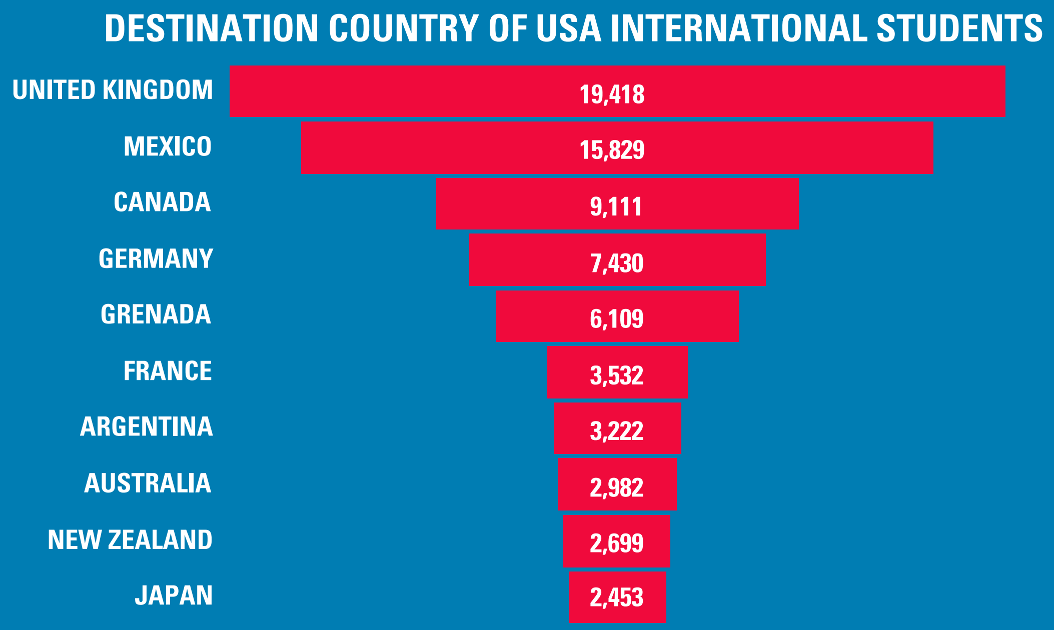


Chart 16

One opportunity for attracting many North American students is the lack of a language barrier. Many traditions in the USA and Canada are also followed in the UK and this leads to less of a culture shock. The UK is an attractive study abroad option for many other regions in the world so developing advertising around the positives of choosing us as a 'home away from home' could help persuade North Americans to enrol here.

Google is not North America's search engine top dog anymore… just joking. Of course it is.

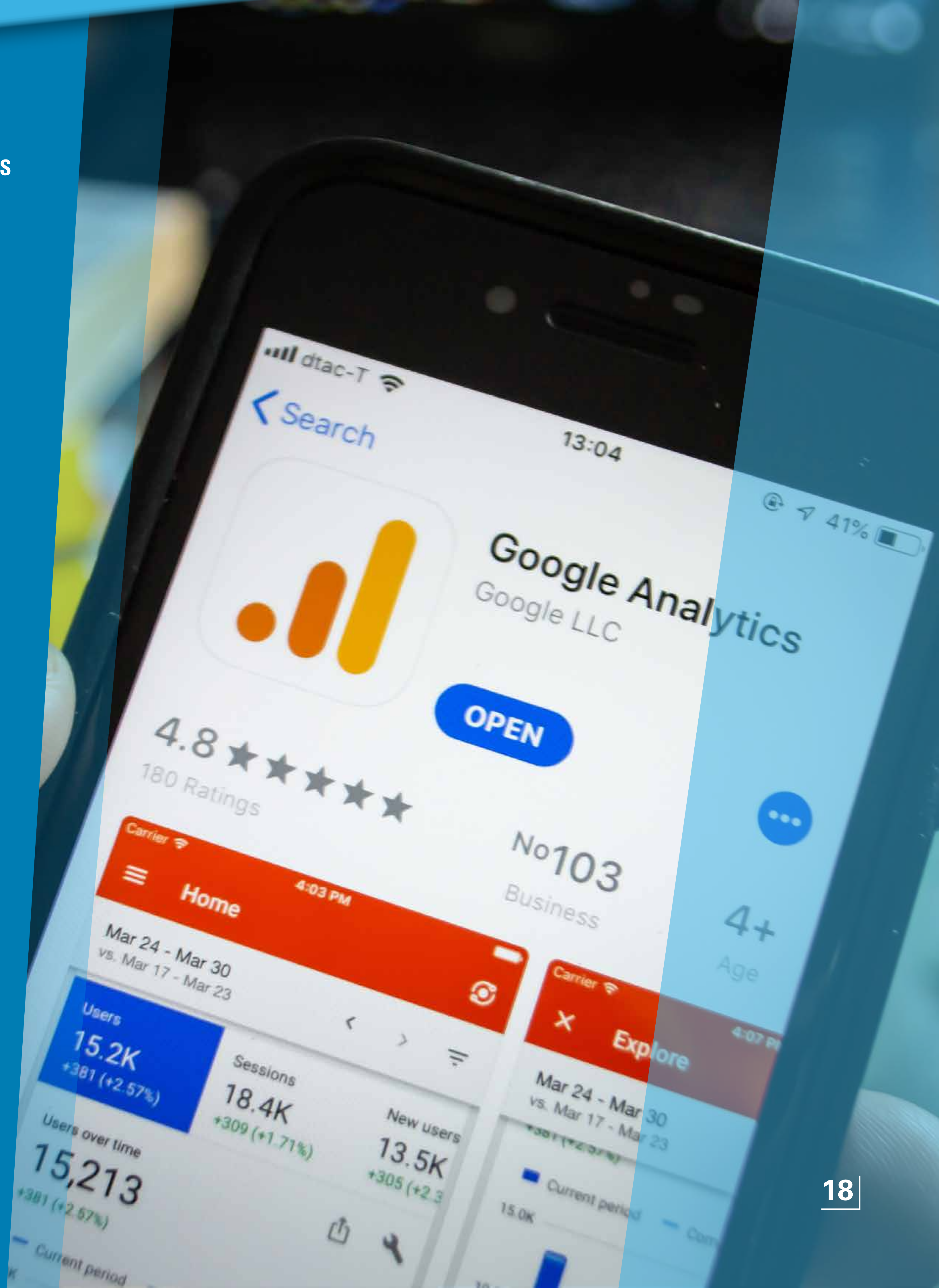
Google continues its reign as the most used search engine in North America. Bing still gives it a little competition though, holding 6.5% market share[87].

As previously mentioned, the CPC is high for a region that doesn't send many students each year to the UK. But organic content, like we suggest for Australasia, could help bring students that are interested in the UK to your university. The USA and Canada spend more time online than the global average[41], suggesting they are prolific users of the internet.

We do expect the USA in particular to become a big market for British universities, and we know of a few that already count this area as a key market. The costs of domestic study for Americans are a driver behind this. According to the Times Higher Education[88], courses take a year longer to complete, and graduates finish with an average of more than £101,000 of debt.

North American audiences have a loud voice on the internet, especially when compared with African countries. The USA has a particularly large number of influencers that help direct the spending choices of millions.

In UCAS's student trends report[33], it was found that in first year UK university students, 4 out of their top 10 influencers are American. This ability to reach people worldwide means that even if North America is not a key market for international students, their opinion of the UK matters.



CENTRAL & SOUTH AMERICA
(ALSO BROKEN INTO LATIN AMERICA)

Student enrolments from this area have stayed between 2,000-3,000 in the last 15 years, and this year was no different[16]. Central and South America have the second lowest number of sign-ups from all regions, which instantly tells us that right now the focus should not be on this market.

Education in Latin America has been progressing in the last decade or so because of several investments into primary and secondary schools, but almost 12 million children and adolescents remain outside of the system[89]. Those living in remote communities or as part of indigenous populations are more likely to face barriers to education.

There are a few organisations such as UNICEF, that are coordinating and developing these societies to help provide education[89], but until these strategies begin to bring real improvement, we can expect low numbers of international students coming from Central and South America.

Social media is used by a lot of people in Central and South America

Facebook holds the majority market share as usual, but Pinterest interestingly comes in second[90]. Pinterest is a social media platform used primarily to find inspiration, and perhaps this design appeals to Central and South America's famed creative nature[91] more than other, more network-focused areas.

Brazilians appear to spend a lot of time on social media[41]. Areas such as Chile, Argentina, and Peru also have high ad reach rates for platforms like TikTok and YouTube[41] but have much smaller populations in comparison.

Research finds that for Latin America audiences, Facebook, Instagram, and TikTok have the most users[92]. TikTok is expected to continue its surge in popularity, as shown by chart 17. It is predicted to have 173.3 million users by 2025, despite only having 25 million in 2019[92]. We will let you know in three years if TikTok has lived up to its expectations!

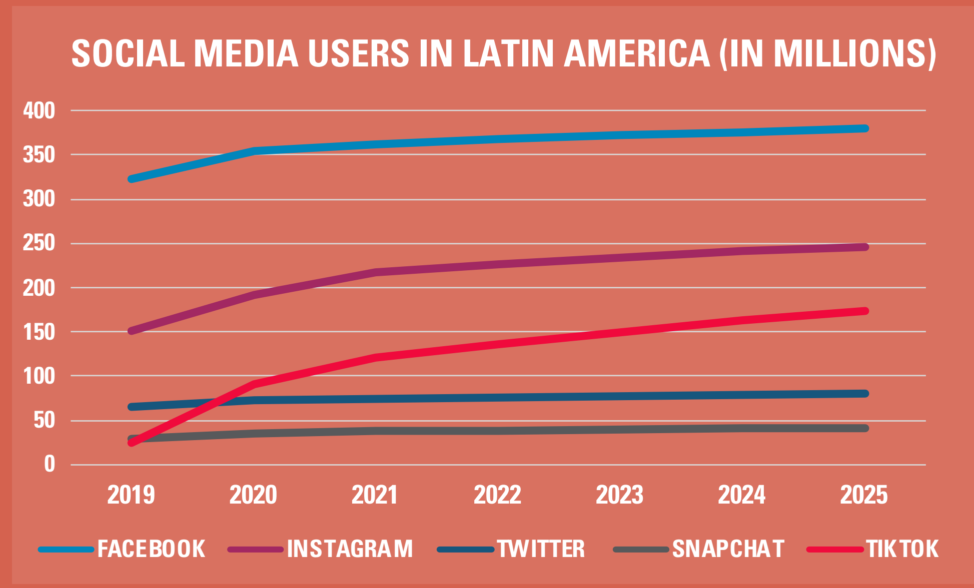


Chart 17

Internet use

As mentioned before, time spent on social media and online is actually quite high amongst the digitally connected people of Central and South America[41]. And this time is predominantly spent through the search engine… yep, you guessed it… Google. Bing has 2.35% market share[93], but since the population of Latin America is at 666 million, this represents a huge proportion of people.

Brazilian, Colombian, and Argentinian populations spend a lot of time on the internet every day, coming 3rd, 4th, and 5th worldwide[41]. With such a high combined population and internet penetration rate of 84.4%[94], Central and South America could be a relatively easy target demographic to reach.

This is a market that we will keep an eye on over the following years to see when it becomes a more viable source of international students, but we imagine lack of finances and access to education will remain big barriers to university-level study for some time yet.

TO SUMMARISE

The UK is a top destination for studying abroad and continues to receive high numbers of applications from around the world. To inform this report, we used figures from HESA[16], which record where international students come from. Their most recent update includes the numbers for the academic year 2020/21, so the full extent of the Coronavirus pandemic's effect on international study cannot yet be assessed.

However, we can see that although there have been drops in enrolments from regions like China and North America, most regions have continued to increase their numbers as shown in chart 10.

Europe remains a steady source for the UK, which suggests that Brexit was not as damaging to our reputation within the EU as we first thought. India shows a dramatic incline in recent years, and we hope this trend continues in the future.

QS[2] reports a shift in concerns over studying abroad, suggesting the original fears that the UK is unwelcoming have been squashed in the last year. But this gives way to new issues surrounding how supportive, environmentally friendly, and sustainable we are.

These concerns also reflect the change in priorities for Generation Z. In our student trends report, we found that Gen Z are zeroing in on brands and holding them accountable for their business practices and ethics. All industries will need to accommodate for this and plan their advertising strategies around impressing the new youth cohort.

This also necessitates good quality organic content, since this is perceived as more authentic and trustworthy. For regions with high internet usage but low enrolment rates, this could be a cheap way to bring in a few extra students.

Now you know who to advertise to, but how do you engage with them?

Facebook is on its way out, and it is taking its restrictive advertising platform with it. We want to move towards platforms that Gen Z are enjoying the most, and away from Facebook Business Manager, which has reduced its filtering capabilities in this last year.

The new global social media trend is video, and we expect to see an increase in this content everywhere over the next few years. It is more interactive, informative, and therefore an essential tool to all future advertising campaigns.

Since video is coming to the forefront, it is bringing YouTube and TikTok with it. Instagram is also becoming more video friendly and continues to be one of the most popular SNSs as Facebook loses its momentum.

Google is not experiencing the same decrease in popularity as Facebook, however. Yandex and Baidu are more popular as regional search engines, but generally speaking, Google is top dog. The next to be considered is Bing, which has a small market share in comparison, but still represents a huge number of internet users. It is also a cheaper option, so it is still in the running for our advertising campaigns.

We hope you find this report useful when considering your advertisement options for drawing in the next year group. We look forward to working with you on these in the future!

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MEET THE AUTHOR

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Hi, I'm Emily, and I recently graduated with a degree in Media & Communications from Swansea University. I jumped at the opportunity to become a permanent member of the RH team as a Digital Media Executive. I also assist with the research we continuously undertake, such as this report, to stay up to date with student trends and help inform our future campaign strategies.

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