



YOUTH MEDIA TRENDS

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2023 REPORT





CONTENTS

INTRODUCTION	6
ABOUT GEN Z	8
MONEY, MONEY, MONEY	10
FORMULA FOR SUCESS	12
FACEBOOK	14
INSTAGRAM	16
X (PREVIOUSLY TWITTER)	18
SNAPCHAP	20
TIKTOK	22
YOUTUBE	24
PINTEREST	26
REDDIT	28
DIRECT MESSAGE APPS	30
BEREAL	32
GOOGLE	34
TV	36
RADIO	38
PODCASTS	40
SPOTIFY	42
OUTDOOR	44
INFLUENCERS	46
TOO LONG, DIDN'T READ	48
BIBLIOGRAPHY	50-54
AUTHOR	56
CONTACT...	58

HELLO AGAIN

At RH Advertising we pride ourselves on making informed decisions when it comes to the student market. We do extensive research to remain knowledgeable on current media trends, then we update this report every year to share this knowledge with you.

Welcome back to our eighth annual publication of the Youth Trends report. We continue to focus on Gen Z (specifically those aged between 18 and 25-years-old), also known as 'Gen Zers' or 'Zoomers' – who currently make up 15% of the UK population¹ (mintel). This is an increasingly challenging period for the generation, and that makes it all the more important to build connections with them in order to draw them in. We will be going into detail on Facebook, Instagram, X (previously twitter), Snapchat, TikTok, Pinterest, Reddit and YouTube, and discussing the opportunities available in TV, radio, outdoor, and Google platforms. We use the information in this report to shape our media campaigns for the coming year, and to inform our clients of any upcoming trends to watch out for.

In the academic year of 2021/22, HESA² reports that a total of 2,862,620 students are enrolled in a UK university. This is an increase of 110,755 from the academic year 2020/21. Those in their first year of undergraduate study totalled 658,925, a decrease of 165 from the previous year. This shows that postgraduate studies are becoming much more popular, so the 'older' Gen Zers are still relevant in your advertising campaigns. International students also remain a key demographic for universities, and our dedicated International Student Report goes into further detail on how to tailor your programmes to reach various locations.

This year, our honourable mention goes to the cost-of-living-crisis, which will influence student experiences and access to higher education in ways reminiscent of the Covid-19 pandemic. It's going to be a tough season for advertisers and audiences alike.



ABOUT GEN Z



We look at undergraduates within the age range of 18-20 years old, while postgraduates fit somewhere around the 21-25 year old demographic. These young adults have a strong generational identity and come with their own set of morals, expectations, and behaviours surrounding businesses and advertising.

Digital natives grew up with the internet and are unlikely to remember a time without social media. This has created a unique band of students who have a much more natural understanding of the internet than those who came before them. They are comfortable in online spaces. In fact, 54% of Gen Zers spend at least four hours on social media sites every day, more than any other generation³ (morning consult). Put it this way – they likely know more about the online world than you do. This means you need to treat them as equals (ideally utilising two-way communication) and with the knowledge that they will scrutinise your ads, albeit subconsciously.

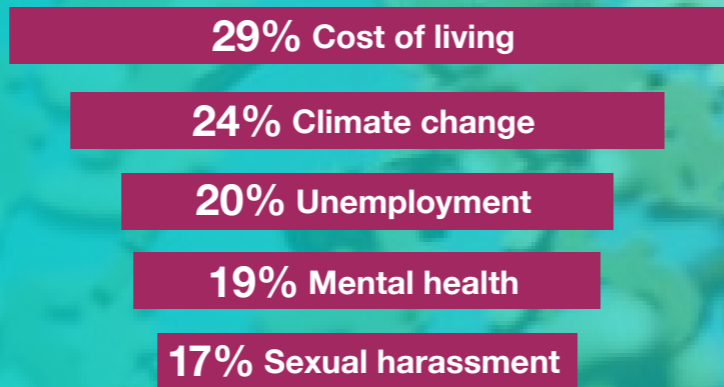
Mental health remains a big issue among students. Research by Chen and Lucock⁴ found high levels of depression and/or anxiety amongst UK students during the pandemic. ONS⁵ also reported that 43% of women and 26% of men aged 16 to 29-years-old were experiencing depressive symptoms. Are mental health problems becoming more widespread, or are they just being discussed more openly? Either way, universities need to engage with this.

But how? Demonstrate the services they can have at their disposal. According to UCAS⁶ (student mindset), survey answers to the question “What should universities and colleges do next to encourage you to choose them as your firm choice?” included comments such as “clearly outline financial, mental and academic support available” and “highlight how they will support students with additional needs”. This is a theme that has continued from the previous years’ cohort and I’m sure one that we will be readdressing next year too.

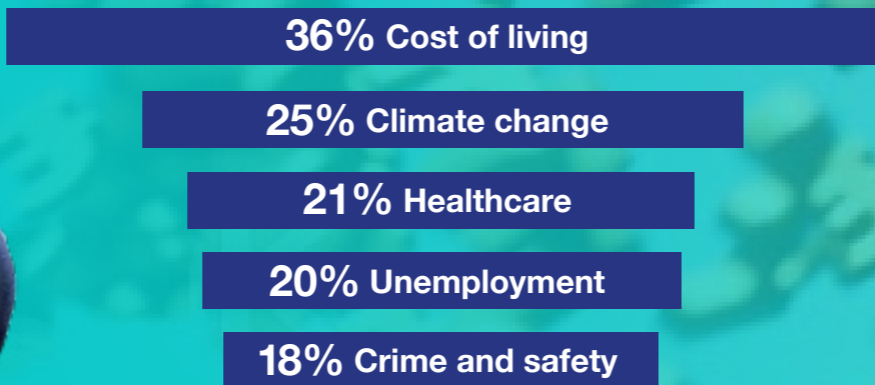
MONEY MONEY MONEY...



Top Gen Z concerns:



Top Millennial concerns:



...It's a rich man's world. Our pockets are taking blow after blow, with no sign of stopping. The cost-of-living crisis has reduced net-of-tax earnings by 2.5% between April 2022 and April 2023⁷ (ifs), and wages aren't expected to return to 2021 levels until possibly as late as 2027⁸ (big issue).

This crisis affects students from the very beginning of their journey to choosing a university. The UCAS Student Mindset⁶ Report points out that 42% of prospective applicants from the most disadvantaged areas cut back on open days due to the cost, compared with 35% cutting down from the least disadvantaged areas. 53% opted for virtual events instead. It is also reducing the pool of reachable students, as 26% reported that they are considering choosing a university closer to home, and 24% are considering living at home⁶ (student mindset).

Furthermore, UCAS⁹ (student spending) reports that parents are paying less towards students' university lives, suggesting there is a lack of financial backing compared to previous years. University is an expensive experience, so the fact that 15% of households will be categorised as having the lowest spending power and 7.5% will not be able to afford essentials is a worrying one¹⁰ (Experian).

The charts here (hootsuite) show that the cost-of-living crisis is at the top of this young generation's minds – followed by climate change and unemployment. It also demonstrates how different each border generation is from the other in terms of their priorities and concerns. Channel 4¹² conducted research into Gen Z Brits and found that 63% agree the cost-of-living crisis is having a negative impact on their mental health. Gen Z are looking to the future and considering possible threats – Hootsuite¹¹ suggests that you remain aware of your audience's struggles and offer opportunities for genuine connection over them.

To make matters worse, a new Student Finance plan has been rolled out ready for the coming academic year, and it's bad enough for Martin Lewis to get talking about it. On 'plan 5', some students will essentially pay double what they would have on the previous plan and will also be given less in their maintenance loan, pulling higher education further out of reach for those with a lower economic status¹³ (money saving expert). As a result, more than half of prospective students agreed that they have lowered their expectations from university life⁶ (UCAS student mindset).

THE FORMULA FOR SUCCESS: AUTHENTICITY

In fact, 41% reported that they feel more personally connected with a brand if its content makes them feel like a part of the community¹⁴ (facebook). As an age group that utilises an average of 8.4 social network sites (SNS) and four types of online communication platforms¹⁵ (Ofcom 11), there are plenty of routes to creating these relationships.

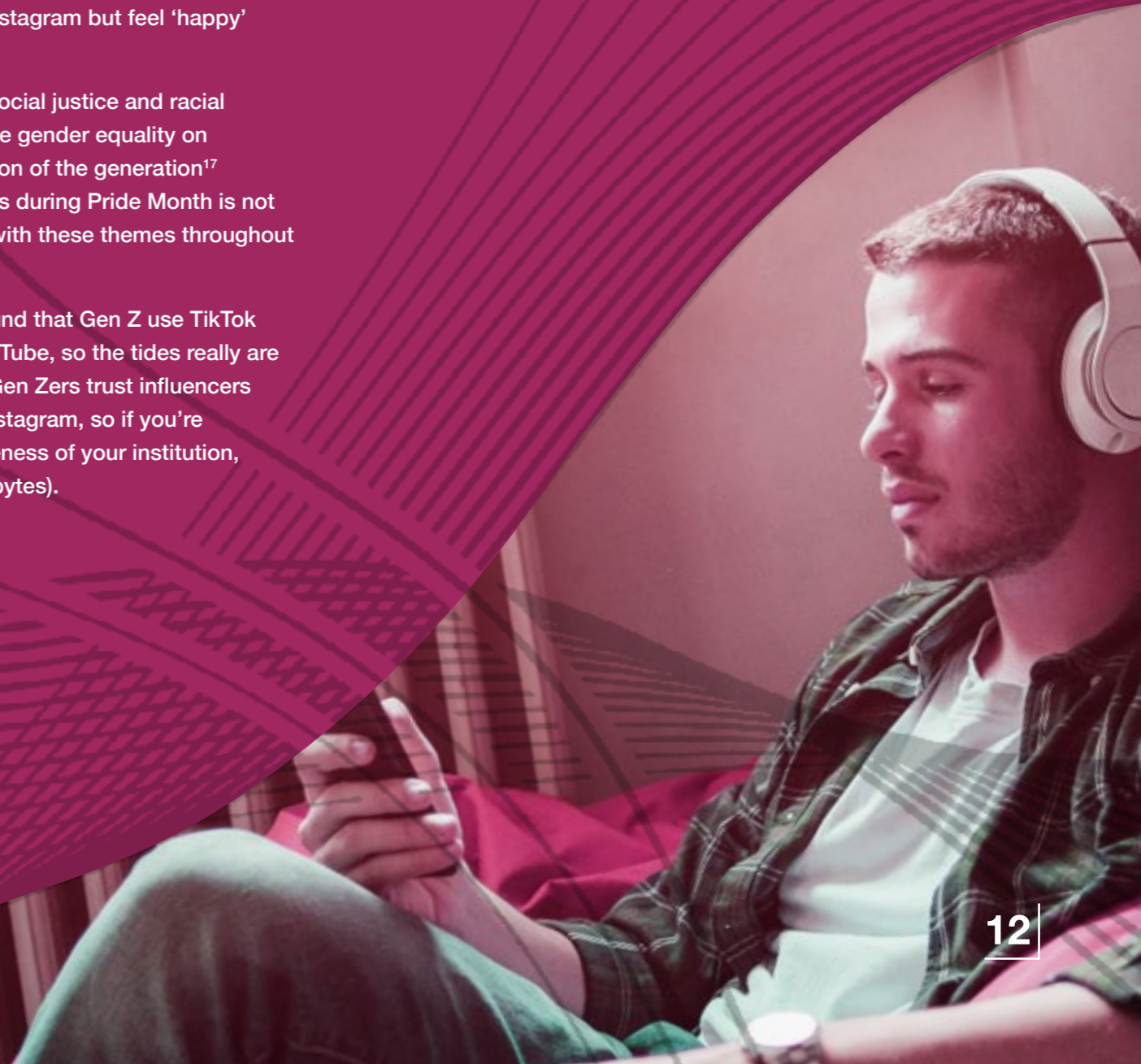
Attitudes towards social media platforms constantly change and are influenced by several factors, including the general 'style', algorithm capabilities and site best practices. For example, Instagram compels users to post only the polished, positive parts of their lives, and encourages the use of editing software. There is a bigger focus on follower counts, and audiences are often only exposed to content from creators they specifically select. This has helped develop the Instagram 'Influencer' and gives people the opportunity to put their best foot forwards, but the lack of honesty has been proven to negatively affect many young people¹⁶ (fanbytes). In contrast, TikTok values entertainment over looks, and the algorithm gives casual TikTokers a more equal

footing alongside the large brands and influencers. As a result, Gen Z reportedly feel 4x more insecure after using Instagram but feel 'happy' after using TikTok¹⁶ (fanbytes).

Gen Zers want to see brands advocating for social justice and racial diversity¹⁴ (facebook), and brands that promote gender equality on TikTok is 77% more likely to attract the attention of the generation¹⁷ (thrivemyway). 'Rainbow washing' your profiles during Pride Month is not enough, you must be continuously engaging with these themes throughout the year to impress your target audience.

UK based research by Fanbytes¹⁶ has also found that Gen Z use TikTok the most, followed by Instagram and then YouTube, so the tides really are changing for social media use. Furthermore, Gen Zers trust influencers much more on TikTok when compared with Instagram, so if you're considering using influencers to spread awareness of your institution, TikTok may well be the platform for you¹⁶ (fanbytes).

Gen Z want to feel 'an authentic connection' with the brands they like, according to Meta research¹⁴ (Facebook).



FACEBOOK!

THE BIRTH OF SOCIAL MEDIA



Facebook is known as one of the ‘big four’ companies of the internet age¹⁸ (Birch and Bronson). Sprung from a ‘hot or not’ game in Harvard University, Facebook became one of the first social medias in 2004. Advertising on Facebook began in its first year of operation¹⁹ (Kirkpatrick), and helped build the platform into what it is today.

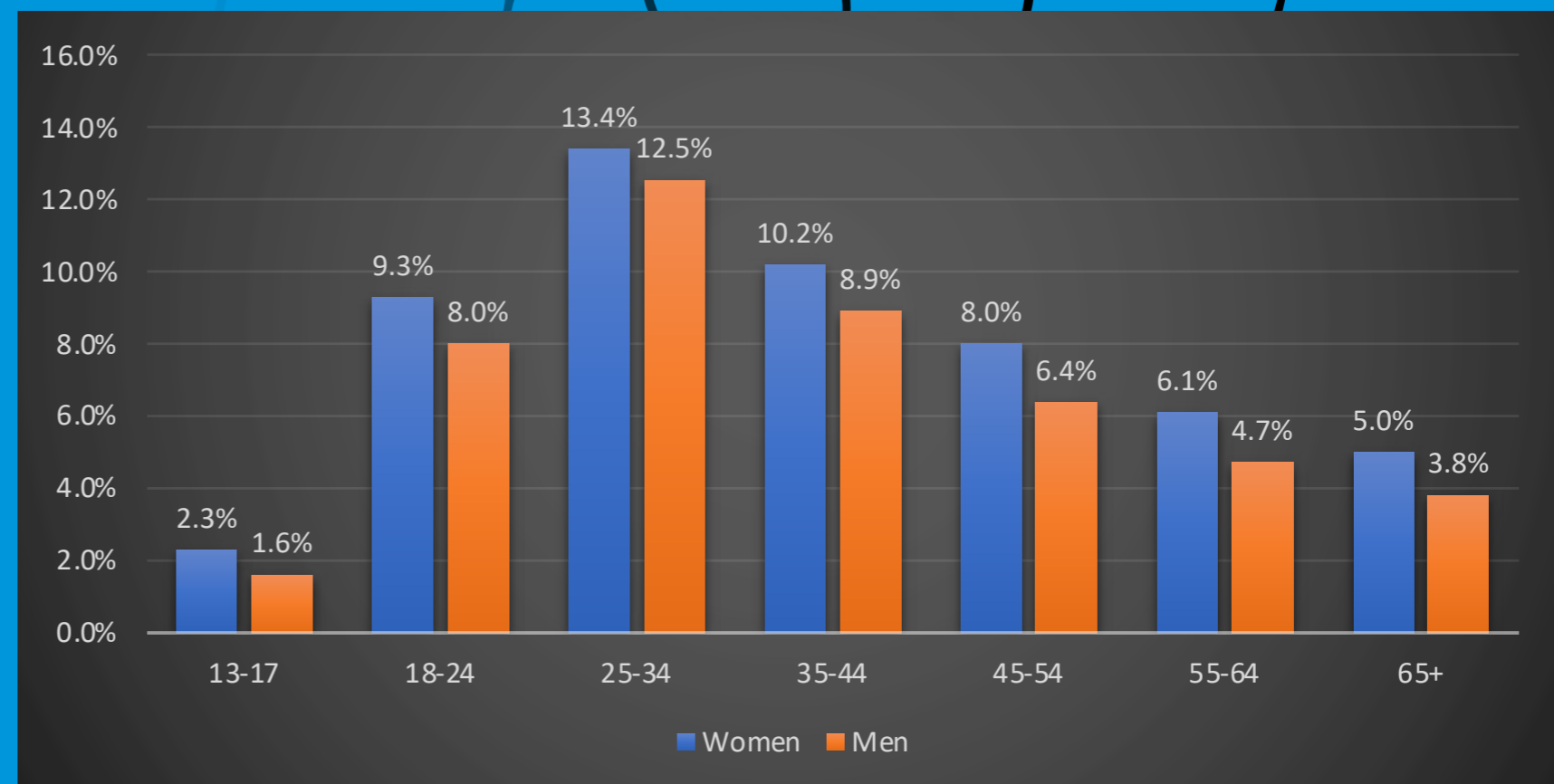
Facebook’s largest European market is the UK, at just short of 45 million users. For this reason, 93% of Social Media Marketers use Facebook Ads to reach their British target audiences²⁰ (social shepherd). The average Cost-per-Click for the Education industry is relatively low (£0.88) when compared with the platform average of £1.31, however courses that fit within the targeting of more expensive industries such as Business may find they have higher costs²⁰ (social shepherd).

Chart 3²¹ (digimind) demonstrates the spread of Facebook users across different age groups within the UK. Facebook has begun to age out of the Higher Education demographic, as Gen Z uses the platform much less than Millennials.

Facebook continues to restrict targeting capabilities too, which makes it difficult to reach specific demographics and results in wasted budget. Nevertheless, 17.3% of total Facebook users equals more than 9.5 million people, which is not a negligible amount²¹ (digimind).

This SNS continues its fall from grace in the eyes of first year university students surveyed by UCAS²² (chap 3). In fact, the decrease in usage equals to 46% since 2016, shooting down from the top to sixth place²² (UCAS chap 3). Students also don’t trust the platform, finding X (previously twitter) and Instagram to be more reliable, with some rating it as their second most distrusted media outlet after The Sun²² (chap 3). That’s gotta hurt...

Chart 3 – Demographics: Age & gender of Facebook users in the UK



INVINCIBLE INSTAGRAM



Instagram was launched in 2010 and bought by Facebook in 2012 as a way for Zuckerberg to minimise his competition and monopolise the social media environment. Instagram retains its popularity for the fourth year in a row²² (UCAS chap3).

UK-wide, there are 32 MILLION users and, much like Facebook, the UK leads the European market²³ (social films).

Its popularity is largely due to the content being purely image and video-based, which particularly attracts millennials and younger users who enjoy visual content much more than written²⁴ (sproutsocial).

Chart 4²³ shows that 26.1% of UK Instagram users are aged between 18 and 25 years old (socialfilms). While Millennials also dominate this platform, the SNS is more heavily populated with Gen Z users compared with Facebook.

UCAS²² reports that Instagram is the favourite platform of first year university students, although this is closely followed by YouTube (chap 3). It has held its reign since 2019, as Facebook began to take a nosedive, shown in chart 5. This is also incidentally when image-based content rose in preference and shows the shift from platforms like Facebook and X (previously twitter), which support written communication much better.

Now that video is beginning its takeover, SNSs that are centred around this format, such as YouTube and TikTok, put Instagram's position under threat.

Instagram is an essential network for any business. According to GWI²⁵ (online behaviour report), Gen Z use it almost as often as Google. While the average daily time spent online begins to decrease²⁵ (online behaviour report), it is positive to see that time spent on Instagram generally increases each year, currently sitting at 32 minutes per day²³ (social films).

Since Instagram uses the same ads service as Facebook, targeting here is just as limited. This creates the same issues mentioned earlier – it is harder to specify the target audience. You'll also be amongst the many – 79% of businesses promote their products and services on the platform²⁶ (fanbytes Instagram). When you consider that 81% of users research products and services here though²⁶ (fanbytes Instagram), it's clear that having a well curated organic account is a necessity for impressing prospective students.

Chart 4 – Most active Instagram users by age

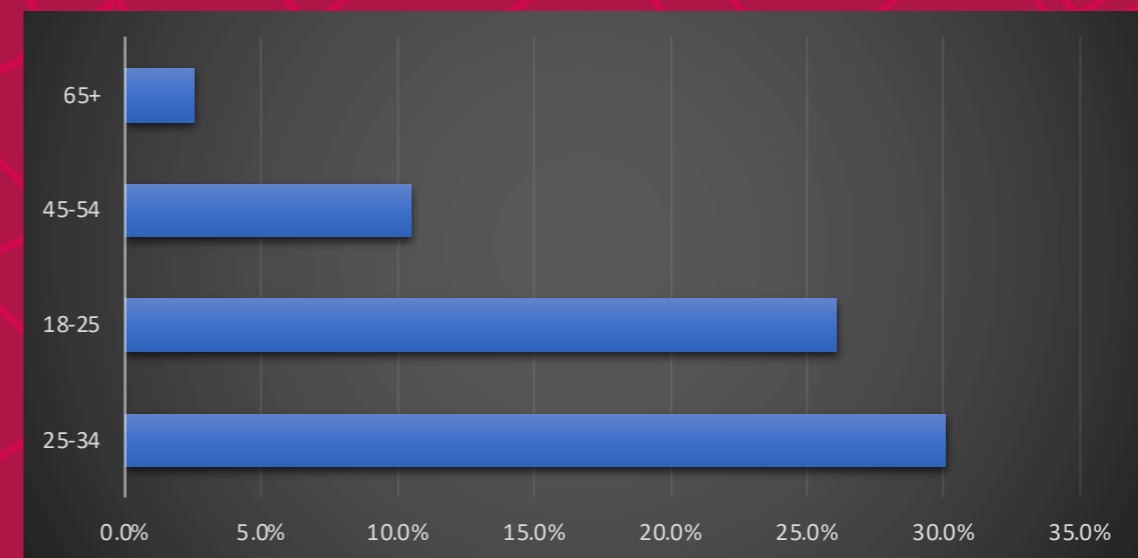
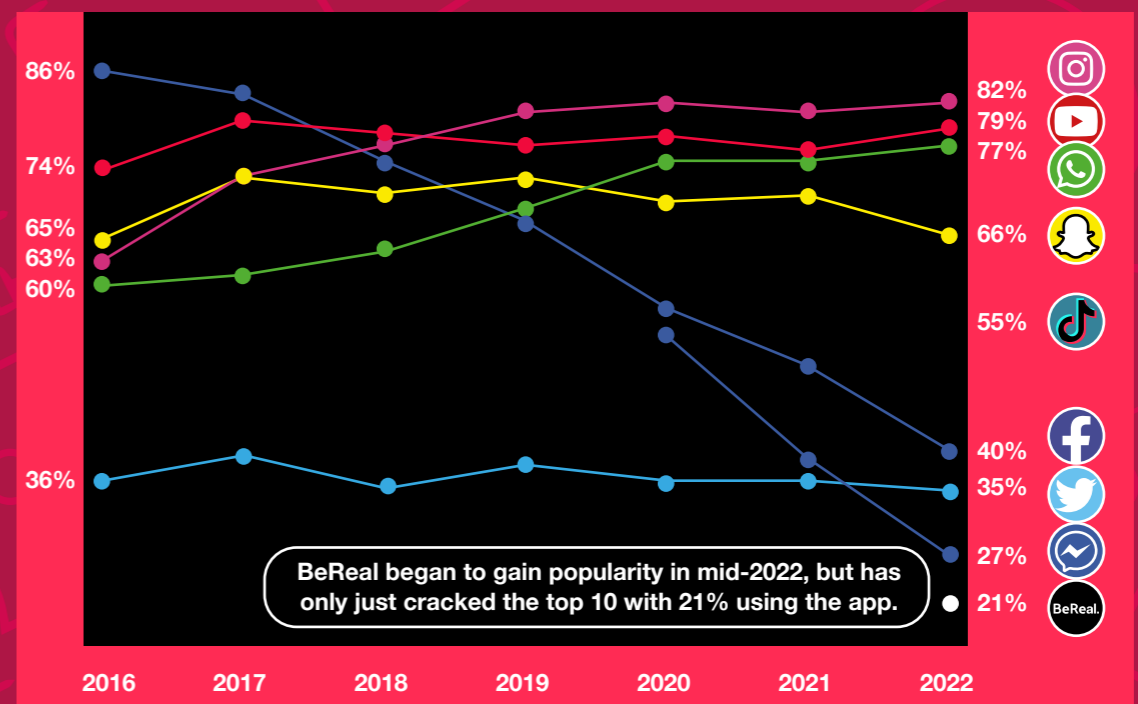


Chart 5 – Popularity comparison year-on-year



TWITTER IS DEAD LONG LIVE X



Twitter is no more. New owner Elon Musk has renamed the platform X but it still provides great opportunities for brands and users to go viral. The site behind the creation of the hashtag, has many large personalities, with larger followings, including Prime Ministers and Presidents with accounts that enrage, stimulate and amuse.

This platform has had a very chaotic year to say the least. As an agency, we have seen unbelievably low Cost-per-Clicks, but that was before the new rules regarding monthly spends and account subscriptions were brought in. To use the platform's advertising services, you must now be awarded with a 'gold tick' or spend at least £1,000 a month.

Shown in chart 6 below, X (previously twitter) usage and advertising audience has also shrunk worldwide by 19.8% in the last year²⁷ (datareportal) – so it is becoming less relevant to the higher education market. We have historically been sceptical of the platform, and it seems we were right to be so.

The UK only has 16.1 million active users and is male dominated – as far as we can tell²⁷ (datareportal). Data specifically on the UK has been hard to come by, with Datareportal noting that there are inconsistencies in X (previously twitter)'s own reporting. However, globally speaking, millennials are the largest userbase, with only 17% of users aged between 18 and 24 years old²⁸ (search logistics).

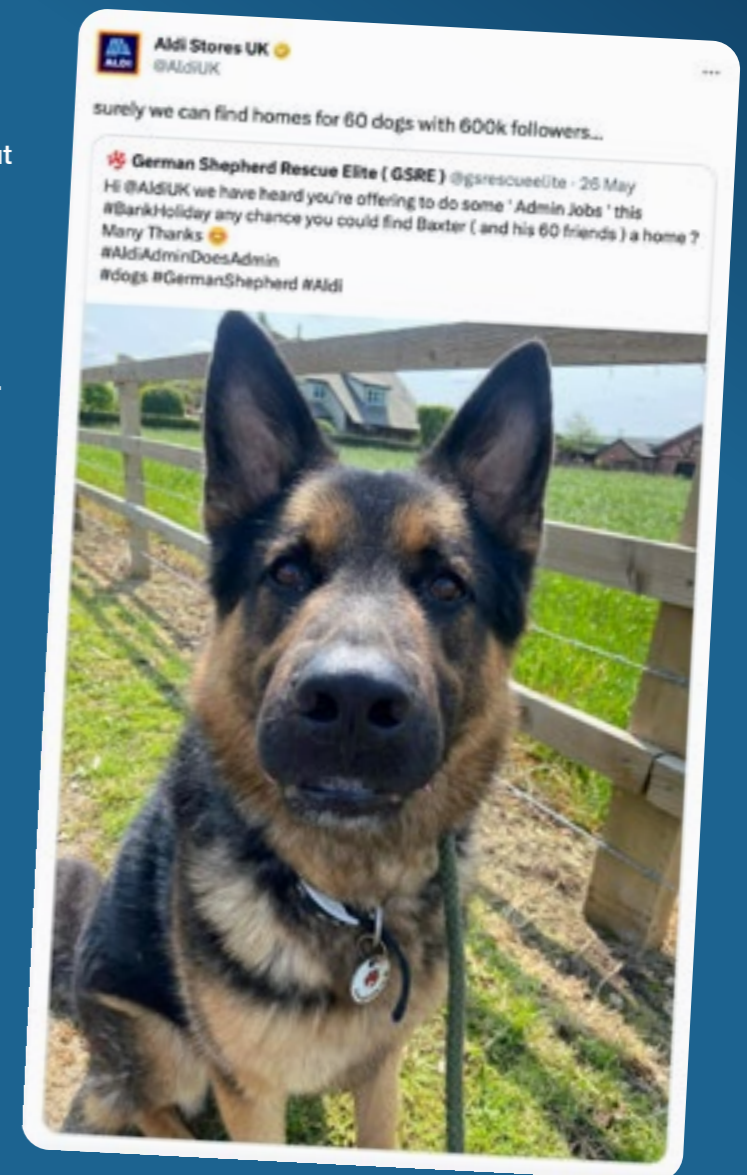
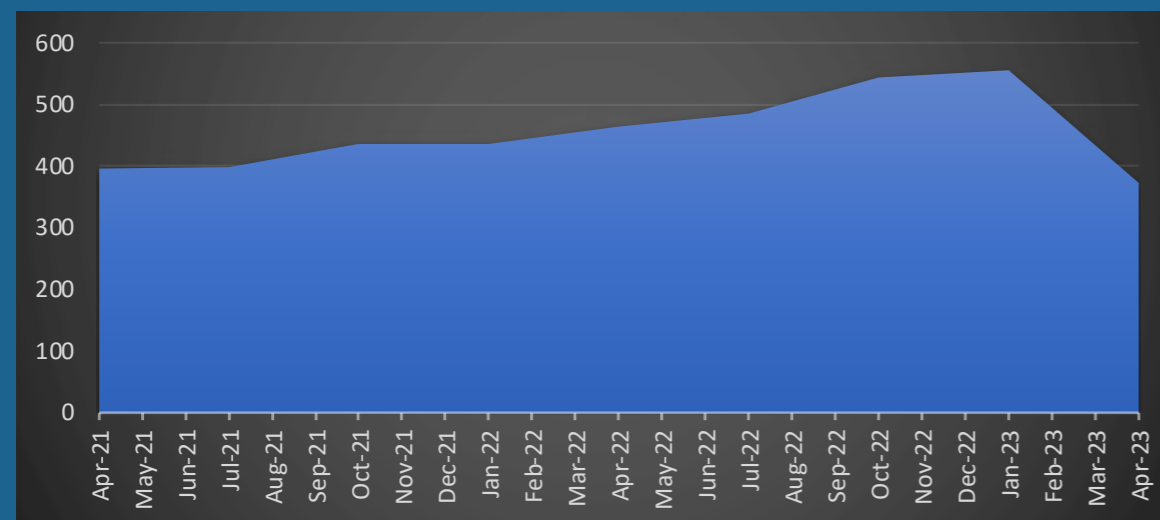
Users also spend less time on the platform compared with SNSs such as Instagram. The average session duration reaches only 11 minutes per day²⁸ (search logistics). For first year university students, usage remains relatively stable at around 35%, although there was a slight

decrease from 2021 to 2022²² (ucas chap 3). This puts X (previously twitter) behind the likes of Facebook, but overtaking Messenger as of 2022.

Some brands do excel on X (previously twitter), with many top performers such as Aldi, who regularly go viral for their down to earth customer interactions. In last year's report, we mentioned the famous 'Colin vs. Cuthbert' court case, in which Aldi won the favour of many young users who appreciated the use of humour in their tweets. Lately, it seems Aldi's social media team has recognised the bleeding heart of social media users and their wish to see brands give back to their community. Reposting a German Shepherd Rescue's tweet, they got involved with helping to find adopters for the resident dogs²⁹ (X (previously twitter)). This post earned them many more 'likes' than usual, with users commenting 'love this', 'twitter content we're here for' and '@marksandspencer could do this easy'.

Aldi is earning the respect and loyalty of its audiences by appealing to relevant social trends. This clearly works with the X (previously twitter) platform and provides brands with a unique level of engagement that doesn't occur elsewhere.

Chart 6 – Twitter: Reported advertising reach (millions)



SNAPCHAT IS DOWN WITH THE KIDS?



Launched in 2011, Snapchat is centred around visual content that self-deletes after viewing. This means users must pay attention to messages they receive from others. Stories employ the use of filters, and typically last around 10 seconds, which again draws in the attention of those who don't like to focus for long periods of time... *cough, Gen Z, cough*.

Snapchat has very helpfully just released local active user figures for the first time! We can confirm that in the UK, there are 21 million monthly active users³⁰ (marcommnews) – that's 30% of the population. Even more impressive is the fact that the platform currently reaches 90% of 13 to 24-year-olds, showing that it is beloved by our target demographic³⁰ (marcommnews). Furthermore, it is consistently named as Marketing Communication News' 'happiest platform'. Snapchat is therefore a natural contender for higher education institutions who want to spread awareness amongst the youth cohort.

Users engage positively with ads – 64% of ads are viewed with the sound on, and 55% of Gen Z

have ad recall after watching just two seconds of a video³¹ (social shepherd snap). Snapchatters are also habitual users, with some reportedly returning to the app over 30 times per day and therefore providing lots of opportunity to brands who want to reach users³¹ (Social shepherd snap).

The platform has also undertaken research into its userbase³² (snap report³⁰). As mentioned in our previous report, younger users are becoming more value-driven and like to see their favourite brands navigating key social issues with grace and acceptance. The visual experiences provided by Snapchat and other image/video-based SNSs help build a sense of community, which is essential to students who are searching for a supportive atmosphere from universities.

Chart 7 – Percentage of social network users

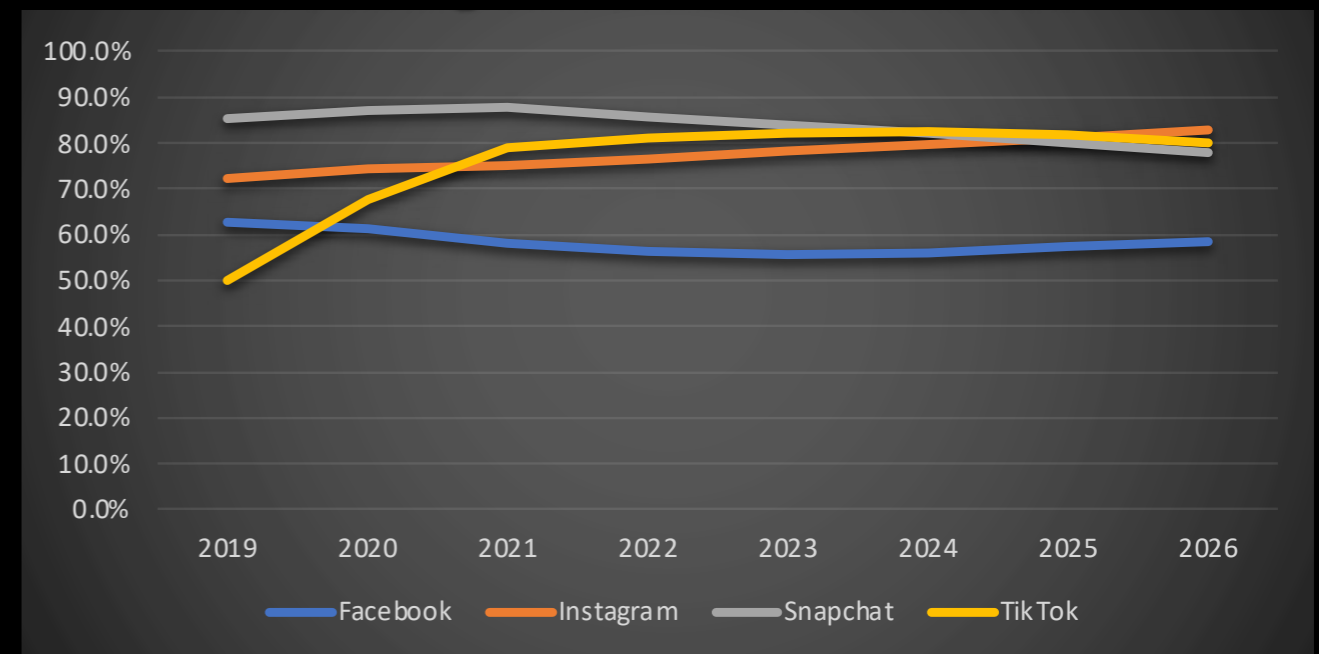


Chart 7 from Insider Intelligence³³ shows that predictions for Snapchat are mild however – with the percentage of social network users decreasing to 77.9% from 83.8% in the next three years.

Furthermore, Snapchat doesn't really have any unique users – only 0.1% to be precise³⁴ (hootsuite). If you are unsure whether you want to use this platform, it may be worth considering others since it is likely you can reach the same users through a different route.

TIKTOK

STILL MOVING TO THE TOP



TikTok was launched in 2017 but has seen exponential growth over recent years (see Chart 5). It is a platform that ‘gets the information first’ with many users joking that Instagram Reels are a month or two behind each TikTok trend. Prioritising users’ interests over top influencers, the SNS captivates the interest of Gen Z much longer than platforms like Instagram and Facebook.

TikTok has been the subject of controversy in the US lately, after the government launched a criminal investigation into ByteDance and its alleged improper access to the personal information of some US citizens³⁵ (CNN). Various parts of the hearing were posted to the platform, and in a unique turn of events, TikTok users rallied around CEO Shou Zi Chew and supported him throughout. Not something you would see happening for Mark Zuckerberg!

At only a few years old, TikTok already has 23.3 million UK users, of which 75% are aged between 16 and 24 years old³⁶ (danslee). Chart 8 shows the distribution of users across different age groups.

Ofcom²² (social media 2023) reports that 85% of online users aged between 16 and 24 years old in the UK use TikTok. This is an impressive feat, and one that does remain specific to the Gen Z age group. Chart 9 by Ofcom³⁷ shows their findings in regard to the use of various platforms amongst Gen Zers, showing that TikTok has overtaken Facebook very quickly.

TikTok is becoming popular because of its algorithm and the type of content that it supports. Much like Vine (rest in peace, old friend), users are encouraged to post short videos that are often either educational or humorous. This captures the attention of Gen Z, who are notoriously difficult to keep interested.

The broad variety of content on TikTok has also threatened Google’s position as a top search engine, and Google has reported a loss in young audiences who instead aim to get more qualitative information from social media¹⁶ (fanbytes). Users look for authenticity and real-life experiences with brands, and this corresponds with TikTok’s preferred mode of expression¹⁶ (fanbytes). The platform provides much more space for smaller creators when compared with Instagram for example, which favours large-scale influencers. Trust in an influencer increases the lower their follower count is³⁸ (bazaarvoice), therefore making TikTok a much more viable platform for research.

TikTok is an ideal location to share your ads, but unfortunately location targeting itself is limited in this early stage. Some cities are unavailable in the UK, and this presents problems for universities in these areas as it will be hard to define a target audience that is suitable. There have been some improvements over the last year, and we expect this to continue as the ads platform becomes more versatile.

Chart 8 – UK TikTok users by age 2023

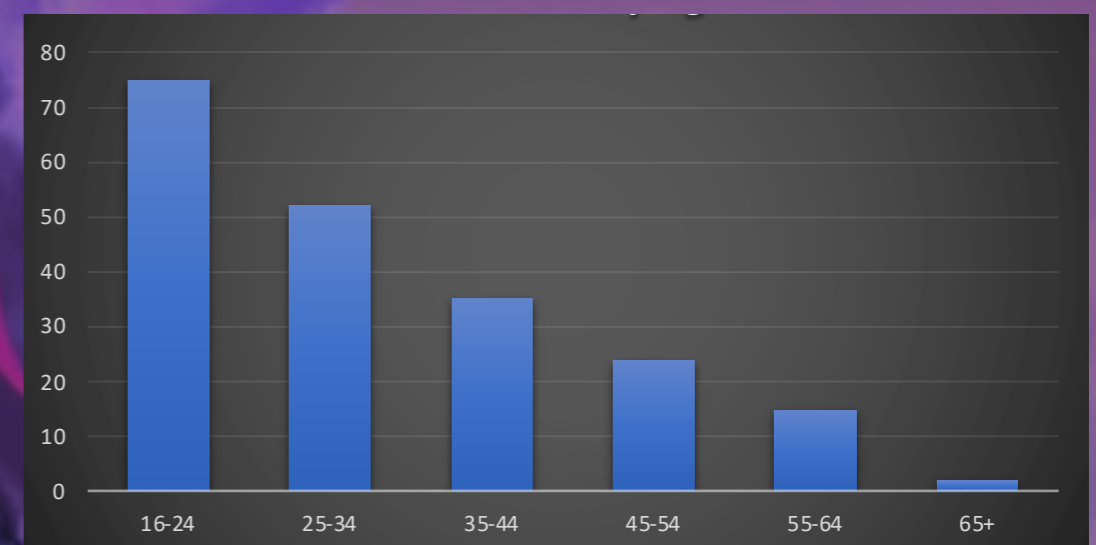
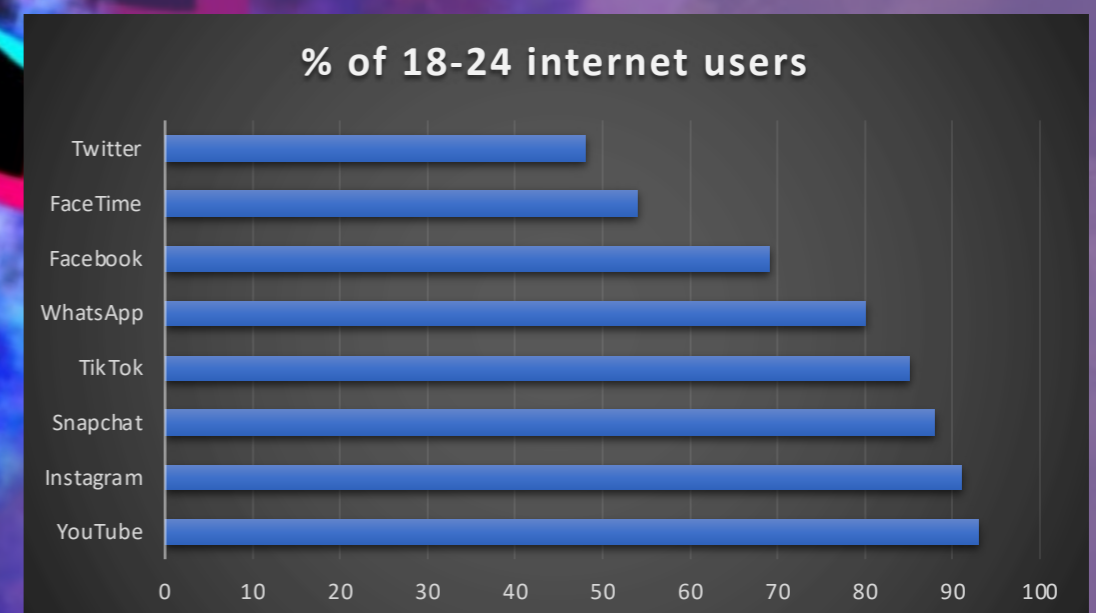


Chart 9 – % of 18-24 internet users



According to a post on LinkedIn by their Product Marketer³⁹ (linkedin), they have released a new script writing generator, helping advertisers improve their copy by providing ideas and suggestions from a few inputs. Big things are on the horizon!

YOUTUBE WE ALLTUBE



YouTube is a world-famous video sharing platform that was launched in 2005 and a year later purchased by Google. As of 2022, 1 billion hours of video are watched each day worldwide, and 500 hours' worth are uploaded each minute⁴⁰ (Visme).

YouTube is the second most visited site globally, accounting for 37% of all mobile internet traffic⁴¹ (socialfilms youtube). In the UK, those aged 18 to 24 years old make up 24% of YouTube's active users, and that 77% of the entire 15 to 25 year old population are users of the platform⁴¹ (socialfilms youtube). However, when first year university students are asked for their most used SNS, Instagram still comes in 3% higher, although YouTube did experience a larger increase in popularity from the previous year²² (see Chart 3) (UCAS chap 3).

YouTube released 'Shorts' in 2020 to appeal to their young users with smaller attention spans. Three years later, YouTube Shorts has roughly 1.5 billion monthly active users, and therefore provides great opportunities for advertisers to reach youth cohorts⁴² (thinkwithgoogle). Chart 10 shows what seems to be a contest for the top spot between Instagram, TikTok, and YouTube⁴³ (laterblog).

YouTube is host to many influencers, and the rise of the internet influencer is often attributed to this SNS (alongside Instagram). Its algorithm shows users the content of those that they follow, inevitably pushing popular accounts into the spotlight. It also shows a host of videos on themes the user has shown interest in, allowing

varied content creators to come up on the home page. Many influencers are paid to speak about products and services and create videos that are in depth and designed to help sell to the audience. It works – 87% of shoppers feel the platform speeds up their decision process⁴⁴ (thinkwithgoogle 2).

Ever an entrepreneurial platform, YouTube can in part stand in for TV and streaming services. Users can buy or rent films, and some YouTubers host their own 'TV shows' (Sidemen channel⁴⁵) or create documentary style films about their lives (isabelle channel⁴⁶). This appeals to younger generations that perhaps aren't interested in regular TV shows and allows them to binge watch whenever they feel like it. It is popular because there is something for everyone, and adoption rates amongst much older generations are also on the rise⁴¹ (social films youtube).

A strong campaign for higher education institutions will include organic and paid content on YouTube, taking advantage of the opportunities it provides to share in detail information about your university. Websites can also insert YouTube videos, creating a pathway for users to explore different facets of your online presence.

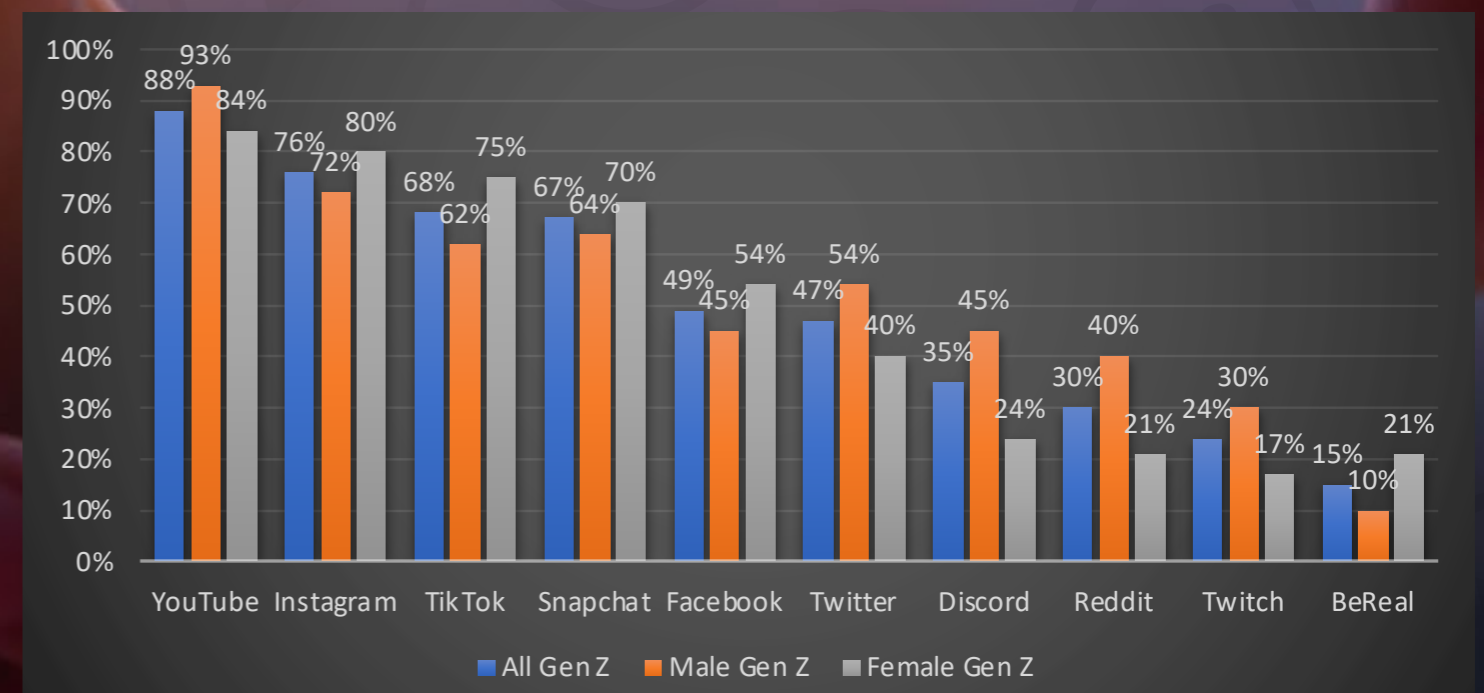


Chart 10 – The shares of Gen Z between the ages of 13 and 15 who say they use the following platforms

PINTEREST

HANDLE WITH CARE



Released in 2009, Pinterest is designed to help its users find inspiration. Photos and videos can be 'pinned' to a users' 'board', and thus shared among their networks. Many influencers post images of their outfits, meals, and fitness routines here as it is a fast way for visual content to spread.

Pinterest is a unique platform, but opportunity for true connections is limited. There are chat functions, but its primary use is for individuals to build their own profile full of inspiration for themselves. Popular themes include fashion, tattoos, art, and healthy meal ideas, but there are many other categories to search through. Audiences on this platform are already in a mindset where they are actively looking to be influenced and are expecting to come across content that may hold a persuasive tone. In fact, a massive 98% of Pinterest users have tried something they have seen on the platform⁴⁷ (social shepherd pinterest).

The UK has 16.7 million monthly active users, of which 55% are aged between 18 and 24 years old⁴⁷ (social shepherd pinterest).

It is therefore primarily occupied by Gen Z. Furthermore, Pinterest doubles as a search engine, with 66% of users considering it a go-to platform for searching up new ideas⁴⁷ (social shepherd pinterest).

It is advised that advertisers optimise pins using relevant keywords, to increase the odds of content showing up in the search results⁴⁷ (social shepherd pinterest).

Pinterest is a female dominated platform, with 72.6% of users identifying as this gender⁴⁸ (Nuoptima). Therefore, higher education institutions should bare this in mind when considering the gender disparity within specific courses. For a male dominated course, this platform may not bring in a high return on investment.



READ ALL ABOUT REDDIT



Reddit, founded in 2005, is a discussion-based website, where different forums hold different groups of users. Posts are voted on by communities, creating threads full of engagement, within a relatively anonymous social landscape.

Reddit prioritises discussions and user engagement over content creation or branding. This makes it a difficult platform to get into organically. However, in terms of advertising, there is a large userbase to reach. 50 million people use Reddit daily, and 430 million use it monthly in 2023, making Reddit the sixth most used social media worldwide⁴⁹ (demandsage).

Conversely to Pinterest, Reddit is a male dominated SNS - 63.8% of users identify as male. This makes it a less relevant platform for female dominated courses in higher education⁴⁹ (demandsage). Gen Z make up 26% of users on Reddit, which is a considerable chunk of the demographic⁴⁹ (demandsage). Consumers spend 9 minutes and 39 seconds on average on the website, which isn't long when compared with bigger players like Instagram and TikTok, however Reddit holds a lot more trust with its users - it is the fourth most trusted platform behind LinkedIn, Pinterest, and Snapchat⁵⁰ (insider).

To summarise, we continue to be wary of Reddit as an advertising tool for higher education institutions. The platform is built much more for community than for brands, and we believe that it is realistically quite difficult to gain traction with ads on the site. Perhaps in the future it will be an option, as predictions for Reddit are very generous (3 billion users in 2025 apparently!)⁵¹ (techjury).



SLIDING INTO THE DMIS



When a user clicks on an ad in Facebook Messenger, it directs them to a chat with the company (often with a chatbot), providing them with an instant response and simultaneously allowing the company easy access to the user's profile.

This creates an engagement rate of up to 80% in the first hour⁵³ (99 signals) and gives you a wealth of data to base future campaigns on.

Not only this, but messenger advertising gets a good rep. 68% like the quick response rate of chatbot technology⁵⁴ (startup bonsai) and 66% say this is their favourite way to communicate with a company⁵⁵ (reve chat). Two-way communication gains more respect from Gen Z too, who appreciate brand interaction much more than previous generations³² (Snapchat).

There is a large audience to advertise to as well. Facebook Messenger has 1.3 billion worldwide users⁵⁶ (messenger people). Online messaging apps are slowly taking over from more traditional methods of communication, such as SMS and email, with workspace messaging apps beginning to reflect the design of Messenger and Whatsapp. The only downside is that there are few unique users⁵⁷ (kommando tech), so this route works best as a complimentary tactic rather than the focus of a campaign.

AN HONOURABLE MENTION TO BEREAL



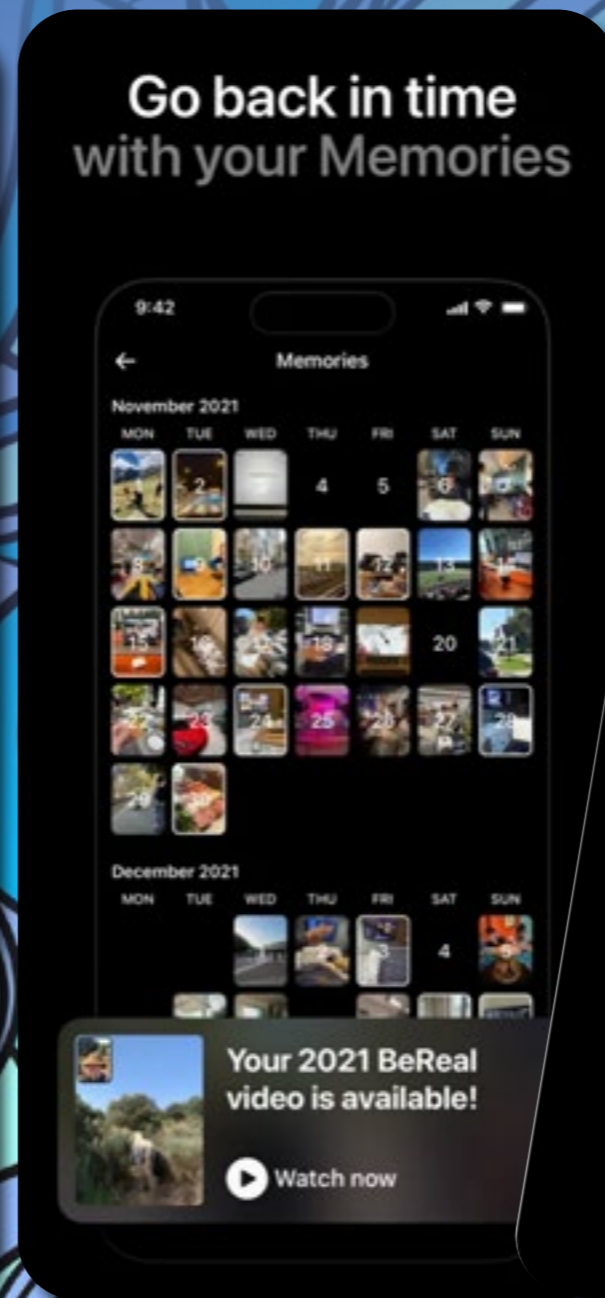
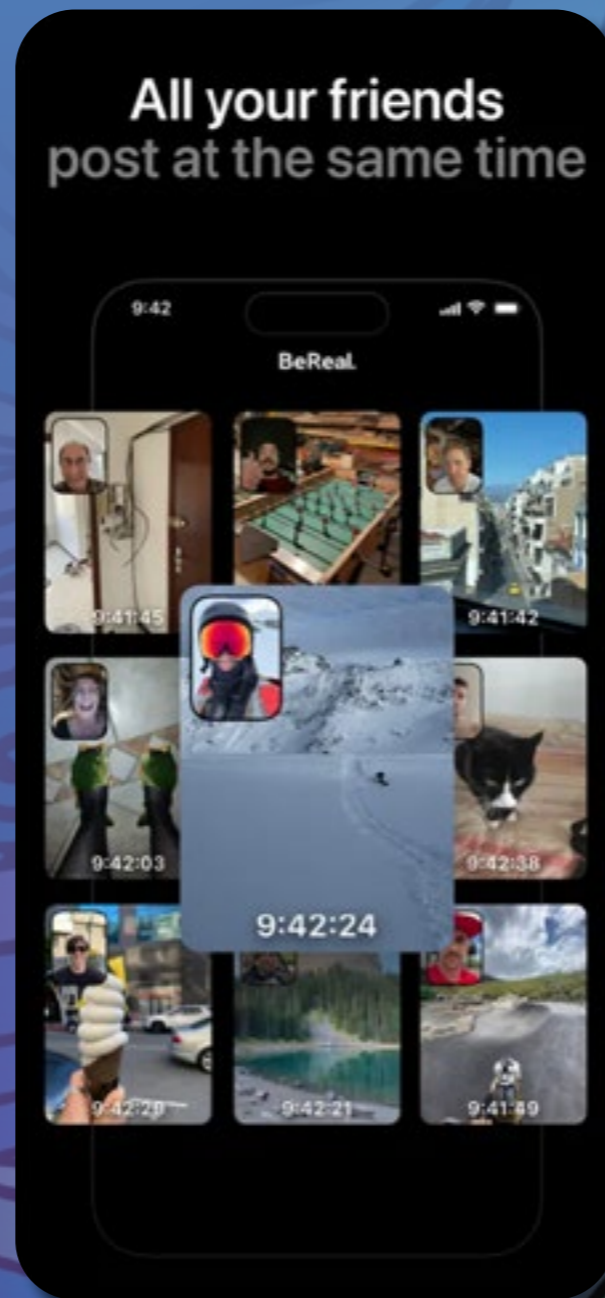
We feel that this platform has earned a mention in this year's report, although it may not show up in the next one. BeReal is the answer to Gen Z's call for a truly authentic place to share their content.

Once a day, users receive a notification that instructs them to take their daily BeReal, with a two-minute time limit to do so. You may post outside of this strict time limit, but it will let your friends know that you were late. This aims to remove the chance for people to 'filter' their lives – and demands an honest accounting of what you are doing at that moment.

This platform can ONLY be used organically, however. BeReal is instead an opportunity for universities to show their followers what the student life is really like and build a relationship with prospective students that is based on honesty and trust. This is a unique offer, and one that brands are slowly taking advantage of.

As of May 2023, the app has 20 million daily users, increasing from 10 million in January 2023⁵² (onlineoptimism). The UK has the second highest number of downloads, and just under 80% are aged between 16 and 24 years old. It even made it into this year's UCAS's Media & Social report²² (see chart 5)!

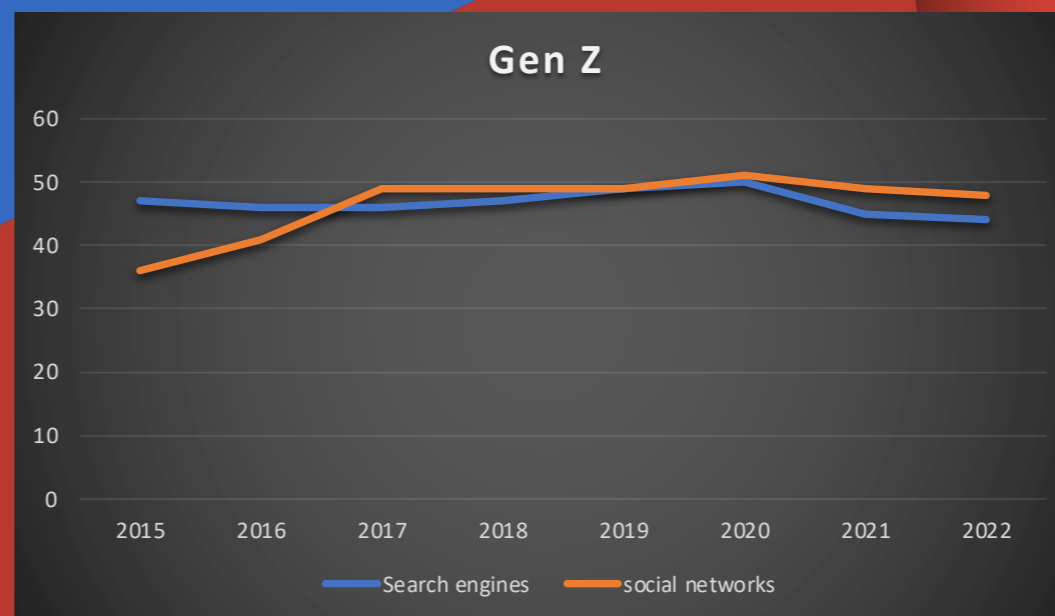
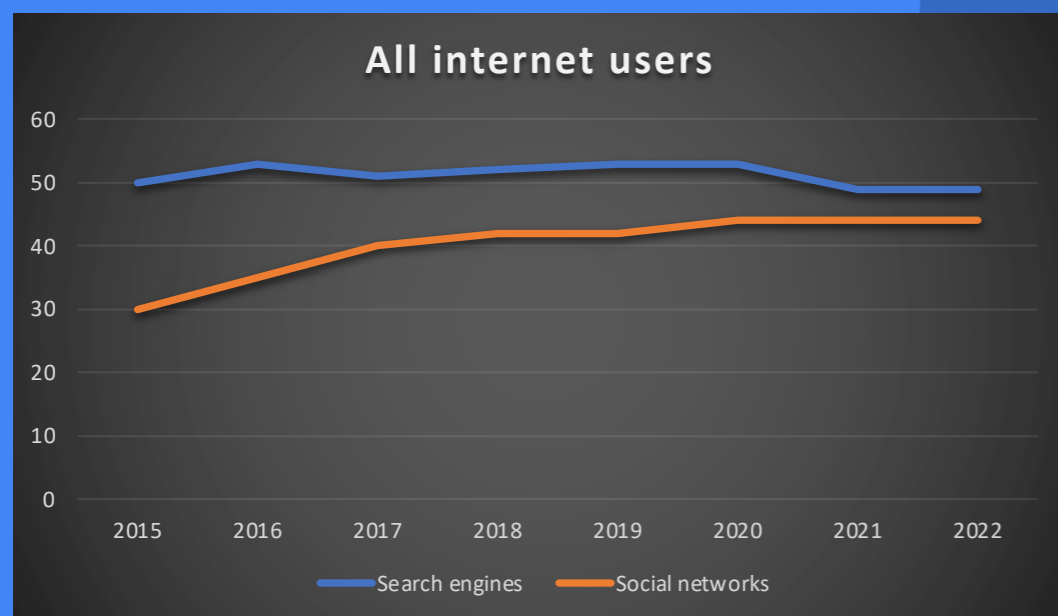
There are some questions over BeReal's longevity though, and many expect this to be a flash in the pan, especially when compared with old timers like Facebook and YouTube. Only 21% of students use it regularly²² (UCAS chap 3).



GOOGLE'S DOMINATION OF THE SEARCH ENGINE MARKET: WILL IT CONTINUE?

Google is every student's friend, especially when they are in the application process and selecting their chosen universities. Google is also the first port of call for many during Clearing, with many showing interest in the process as early as April, according to data we have recently received from the platform.

Charts 11 and 12 – from GWI²⁵ demonstrates this new trend, which is being fronted by Gen Z.



More and more often though, prospective students are turning to social media to learn about brands and organisations. As previously mentioned, Gen Zers are looking towards TikTok, a site full of user-generated content and reviews that they can use to form realistic impressions¹⁶ (fanbytes). This has also been discussed by Google Senior Vice President Prabhakar Raghavan, who says that almost 40% of young people aged between 18 and 24 years old use TikTok and Instagram when looking for a place to eat⁵⁸ (square holes).

Nevertheless, Google remains an effective platform to reach students who are already showing interest in your higher education institution. With a market share of 93.76% in the UK⁵⁹ (statcounter), it is an obvious choice in advertising campaigns.

TV'S ROLE AS THE EXTRA



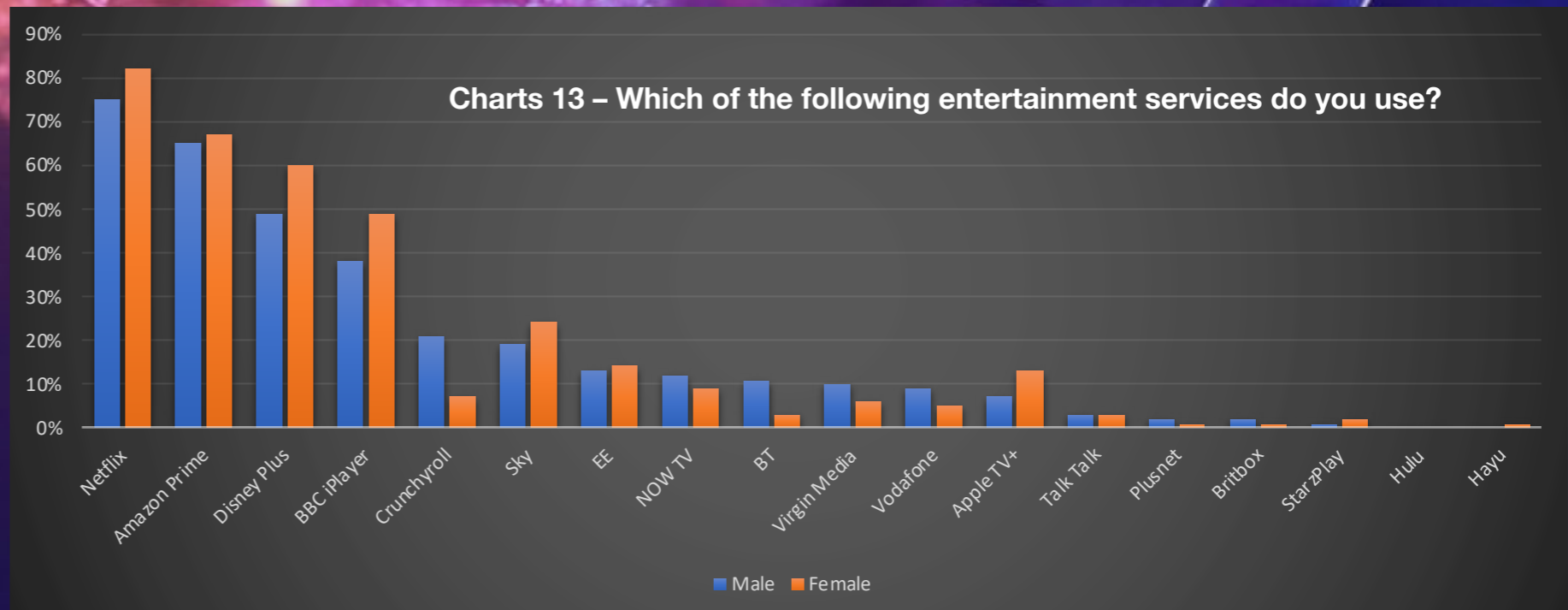
Last year we found research to suggest that TV is consumed more often by older generations, and this trend has generally stayed true.

Some claim that Gen Z prefer to spend time gaming and watching YouTube rather than watching TV⁶¹ (Britopian). However, Channel 4 promotes themselves as having the highest share of viewing for those aged 16 to 24 year olds (across both live and catch-up TV), and that this age demographic watch nearly 5 hours' worth a day¹² (Channel 4). This suggests that there is still an audience available to reach, and this is the channel on which to do so (if they do say so themselves). With an average return of £1.79 for every £1 invested, it is certainly worth considering⁶² (toast tv).

The downside to TV Advertising is the price associated with it. Production costs can be expensive, and slots on channels can start from as little as £70 and run all the way up to £34,000 in peak times surrounding popular shows on channels like ITV⁶² (toast tv). Channel 4 and Sky are generally a bit cheaper than this however⁶² (toast tv).

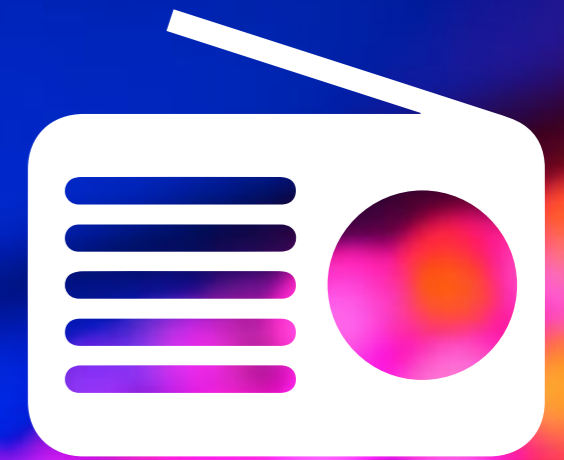
A much more popular form of entertainment service are the streaming services such as Netflix. This platform maintains its popularity in 2023, with others like Amazon Prime, and Disney+ following behind, shown in chart 13²² (ucas chap 3).

Streaming services suit the watching style of Gen Z, who are big 'bingers' and like to be able to watch when they want. In fact, 82% of 16 to 24 year olds report binge watching on-demand every month, and 11% admit to doing it every day⁶³ (finder).



RADIO

DON'T STOP BELIEVING



Gen Z and millennials listen to audio to escape from visual overstimulation⁶⁴ (radio experts). 85% of our knowledge is learned through listening and there is a 65% chance of mood change after hearing a 'positive' sound, so the potential power of influence that audio channels cannot be dismissed lightly⁶⁴ (radio experts).

In the UK, 31% of adults claim to listen to live radio at least once per month either on a smartphone or a tablet, with the largest age group of listeners aged between 15 and 34-years-old as shown in chart 14⁶⁵ (RAJAR). Digital listening represents nearly 68% of all radio listening in Q1 of 2023⁶⁵ (RAJAR Q1 digest).

Commercial radio is delivering record numbers for Global (26.7 million reach), Bauer (22.4 million reach) and News Broadcasting (6.7 million reach)⁶⁵ (RAJAR Q1). Global dominates in radio brand ownership and total reach (including in London)⁶⁵ (RAJAR Q1), so bare this in mind when considering where to place your ads.

While DRV (drivetime) slots are popular, some articles suggest its value has decreased as the work from home movement has come into full swing and commuting becomes a less common occurrence⁶⁸ (askattest). Furthermore, students are less likely to have a 9-5 job with the same kind of commute as adults. Following along the stereotype, it's unlikely that morning slots will reach the right demographic too when students are famous for sleeping in... Careful consideration must be put in for the timing of a radio campaign.

According to YouGov⁶⁶, UK Gen Zers' favourite radio stations are Heart Radio (61%), Capital FM (58%) and Kiss FM (58%). To target London in particular, top stations include Heart London (1.85 million weekly listeners), Capital London (1.65 million) and LBC London (1.45 million)⁶⁷ (radio experts 2). The timing of ads on the radio is as important as the channel though. Chart 15 is an example that shows when an ad campaign will be heard.

Chart 14 – Listening to Radio on Mobile/Tablet

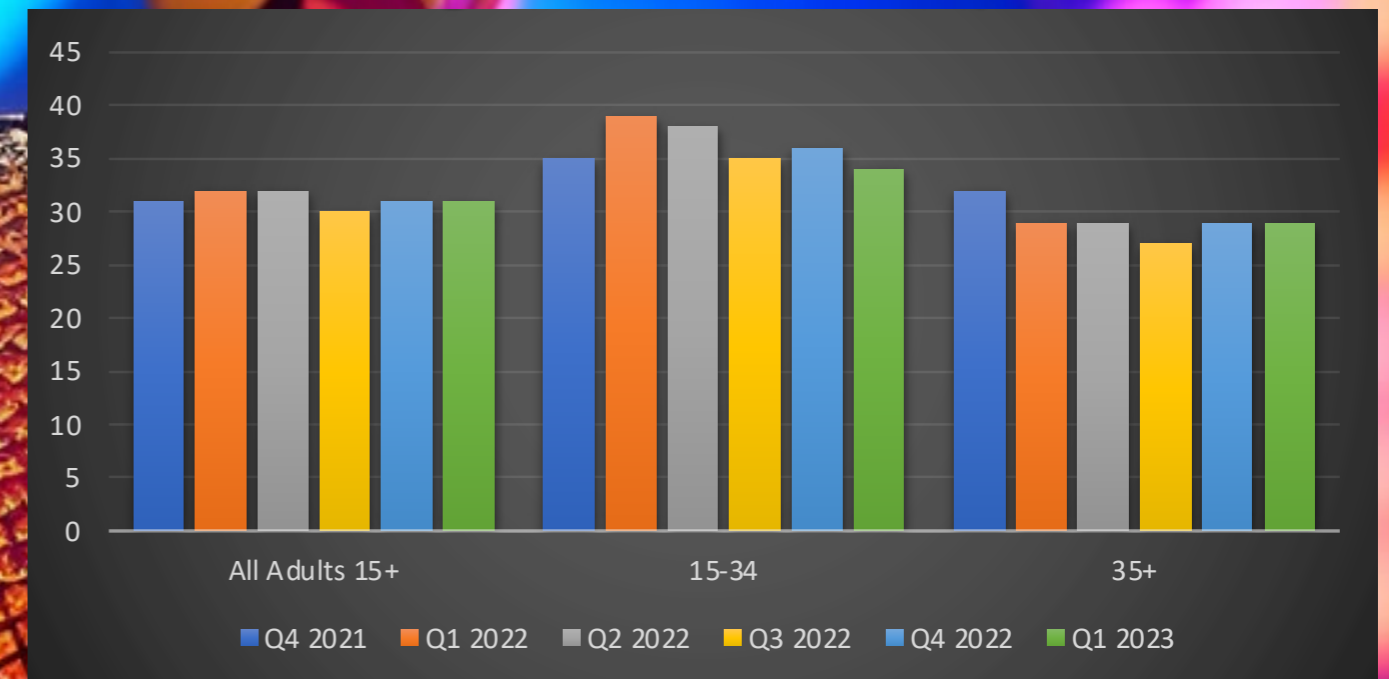


Chart 15 – On air schedule

Seg	Mon	Tue	Weds	Thurs	Fri	Sat	Sun	
OVE	2	2	2	2	2	2	2	00:00 - 06:00
BRK	2	2	2	2	2	2	2	06:00 - 10:00
MOR	1	1	2	1	1	1	2	10:00 - 13:00
DAY	1	1	1	1	1	1	2	13:00 - 16:00
DRV	1	1	1	1	1	2	2	16:00 - 19:00
EVE	2	2	2	2	2	2	2	19:00 - 00:00

PODCASTS

SOMETHING FOR EVERYONE

According to UCAS's Media and Social Trends report²², podcast listening has increased amongst students – from 25% in 2021 to 43% in 2022. This is quite the jump, and definitely indicates a future upward trend in popularity. Students choose podcasts based on these top 5 themes: entertaining, educational, interesting, related to their hobbies, or relatable²² (UCAS).

Podcasts are also ideal for advertising, as 2/3 of UK listeners say they give a show their full attention⁶⁹ (Spotify). This makes audiences generally more receptive - 54% of users have purchased products from a brand after hearing about it in a podcast⁶⁹ (spotify). Furthermore, the lower adload of these platforms results in a 90% completion rate, 80% acceptance rate, 60% recall rate and 50% consideration rate, which is significant when compared with social media's much lower 30% consideration rate⁷⁰ (acast).

There are three types of ads in a podcast: preroll, midroll and postroll. However, you could get the host to publicly endorse your brand too. This falls within the remit of influencer marketing, which we will discuss in more detail shortly.



SPOTIFY

TOP SPOT



Spotify is the preferred music streaming platform and subscription service amongst first year university students²² (UCAS chap 3).

A recent communication from Spotify tells us to expect great things from the ads platform too.

“Our team is hard at work building new changes to the Ad Studio experience. As a part of these improvements, we’re sunsetting our current ads booking experience later this year. As we roll out a new booking experience – with automatic ad placement – that will enable your ads to reach both music and podcast listeners on Spotify. Automatic placement will leverage machine learning to determine where your ads appear based on your delivery goal”.

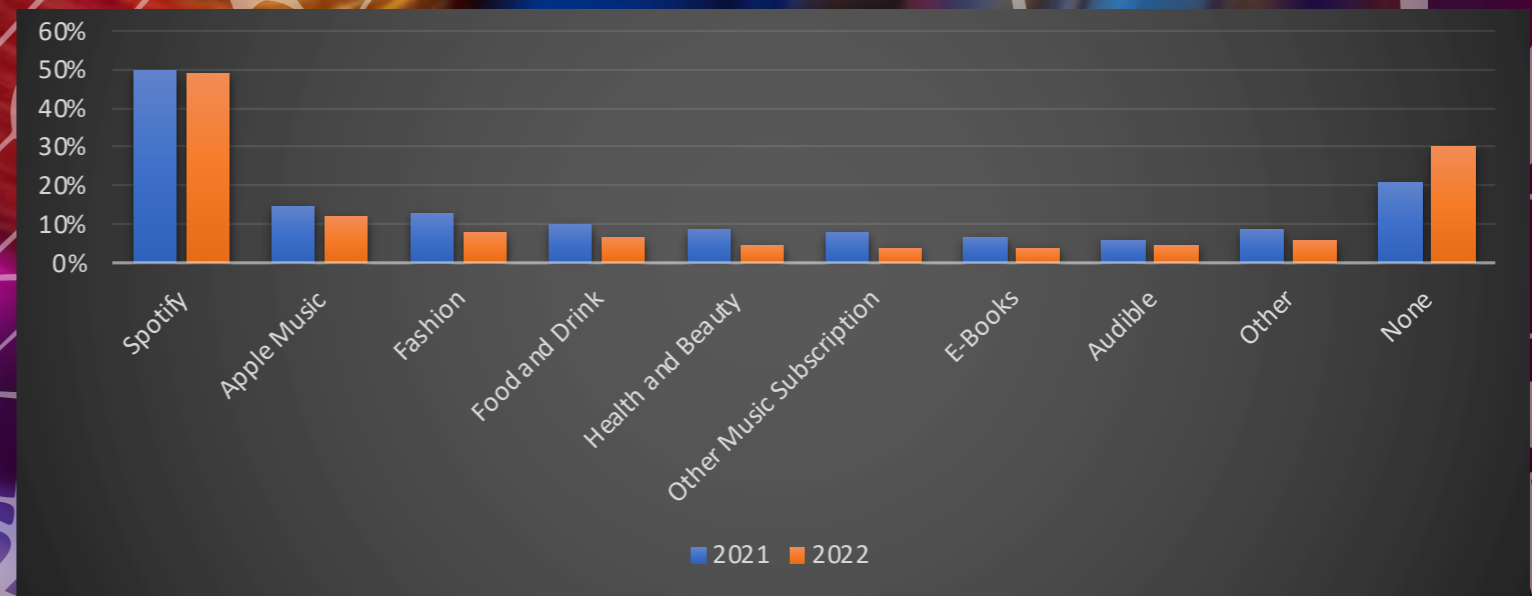
We are looking forward to the changes!

49% of students currently use Spotify, versus only 12% to the contender in second place, Apple Music²² (chap 3). And, although all subscription services are experiencing a decline in usership due to the cost-of-living crisis, Spotify lost the smallest percentage when compared with fashion, food, health, and others, as is shown in chart 16²² (chap 3).

Worldwide, 18 to 24 year olds listened to 578 billion minutes of music in Q1 of 2022, making them the largest demographic on the platform⁷¹ (spotify 2). Gen Z and Millennials have also used Spotify to promote their passion for inclusive culture, as 53% report that they actively sought content from diverse creators⁷² (amplifyyou).

The platform has also developed ways for users to build connections with each other. The introduction of ‘blend playlists’ which creates an automatic playlist created from songs both themselves and a friend listen to allows users to share their music with others. Furthermore, they are introducing a ‘vertically swiped homepage’ inspired by TikTok, aiming to attract the younger demographic and improve the user experience⁷³ (Bloomberg).

Chart 16 – Subscription Services Used



OUTDOOR

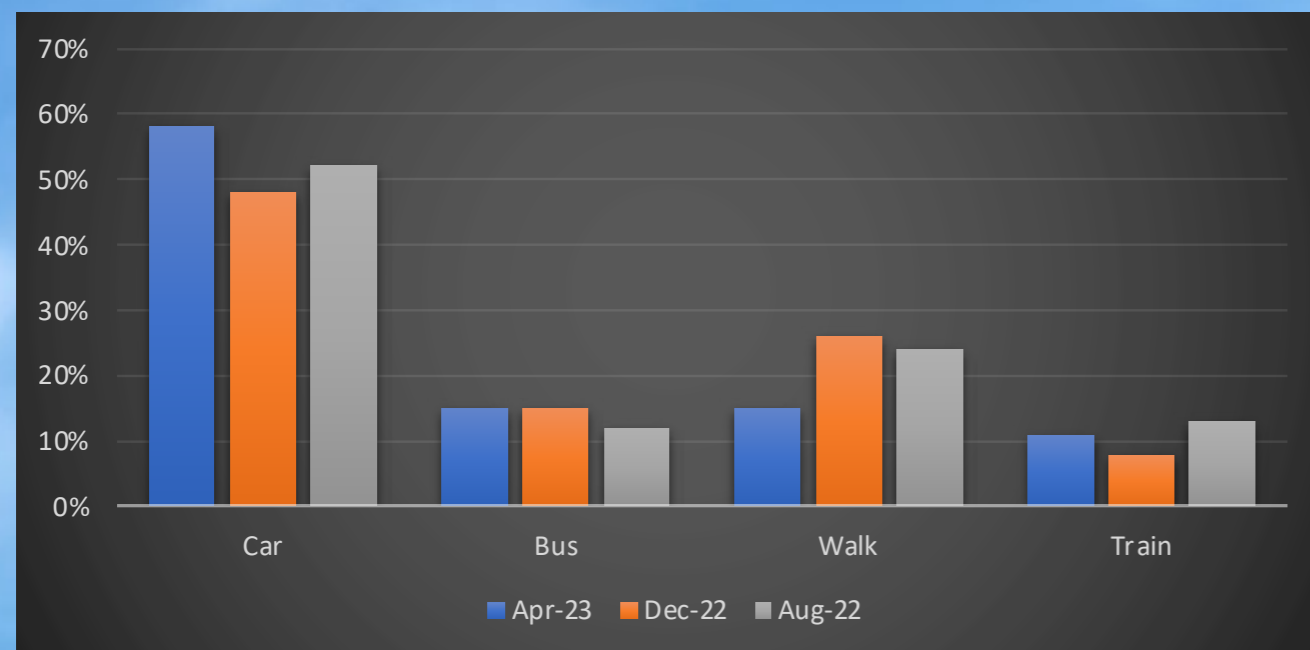
A 150-YEAR-OLD FORM OF ADVERTISING



Despite being the oldest form of advertising, out-of-home (OOH) advertising is still a key route to gaining the attention of your target demographic. According to Clear Channel⁷⁴, OOH reaches 98% of the UK population. Commuters are a large part of this – 8 out of 10 visit their workplace weekly⁷⁴ (clear channel). Chart 17 demonstrates the various forms of travel audiences have used over the last three years.

Gen Z are proven fans of OOH, and attitudes are everything in advertising. 55% of respondents in a survey list outdoor advertising as their preferred form, as it is non-invasive but also often eye catching⁷⁵ (bemedi). The relatively new digital billboard has also made a good impression – they are regarded as ‘informative, entertaining, creative and trustworthy’ by UK consumers⁷⁶ (mediashotz). In fact, Gen Z and Millennials are twice as likely to discuss a digital billboard than those aged over 55-years-old, and rate them as 13% more trustworthy than social media⁷⁶ (mediashotz). It’s clear that we can’t sleep on outdoor any time soon.

Chart 17 – Most Common Forms of Travel



There are multiple formats to use that fall within the umbrella term ‘outdoor advertising’. Some common ones include buses and bus stops, 6-sheets and 48-sheets, and digital 6-sheets. Many of these require a print cost in addition to paying for the space, which must be factored into a campaign budget.

To utilise OOH correctly, attention should be paid to the companies winning contracts from relevant councils. For example, JCDecaux handled Plymouth City Council’s outdoor adverts for the last two decades, but Clear Channel has recently won the contract and is beginning the process of updating the key locations. Global reaches 90% of the London population and has as many as 68,000 sites in the city, so this is key for your campaigns within the region⁷⁷ (global). As part of the contract, these companies must be responsible for the upkeep of the bus stops and such that they build ads on.

OOH advertising is a growing industry – billboard revenue grew by 33% YoY in 2022, while digital billboards grew by 30%⁷⁸ (75 media). Key tips include increasing budget in the summer months when there is a larger demographic outside to reach, and avoiding the use of all-caps as it reduces readability by 10%⁷⁸ (75 media).

INFLUENCER MARKETING

THE INS AND OUTS



Influencer marketing is often defined as a user with more than 1,000 followers, who exercises influence on their audience through social channels. Brands pay influencers to review their products and services, contributing a personal touch and real, trustworthy opinions, while also raising brand awareness. Chart 18 shows popular reasons a marketer may use sponsored content:

By the end of 2023, spending on influencer advertising is expected to reach £1bn in the UK⁷⁹ (brandstore). Depending on the target audience, different platforms will present different opportunities here. Gen Z are going to best reached through Instagram, YouTube and TikTok, with Facebook long forgotten⁷⁹ (brandstore).

There are some general guidelines to follow to make sure you get the most out of your influencer. Nano influencers (1,000 – 10,000 followers) and micro influencers (10,000 – 100,000 followers) interact more with their audience and therefore gain higher engagement rates and a more trusting audience³⁸ (bazaarvoice). Engagement rates can be as high as 12%!

Larger influencers lose engagement as they work more and more with brands and focus less on their audiences. This reduces engagement rates and trust, so less is more in this field. Engagement rates can fall to as low as 2.2% on Facebook in these circumstances²¹ (digimind).

Chart 18 – Popular reasons a marketer may use sponsored content

Reason for use	%
Raising Brand Awareness	86%
Reaching New Audiences	74%
Improving Brand Advocacy	69%
Increasing Sales Conversions	46%

THE TLDR

TO END ALL TLDERS

Facebook continues its fall from grace in the eyes of Gen Z, who instead opt for more visually immersive content that they are more likely to find on **Instagram, TikTok** and **YouTube**, who are all on the rise in popularity (see Chart 5).

Snapchat remains popular, with high usage and recall rates, although it is still behind the aforementioned platforms. Pinterest is still worth the conversation, but it may be difficult to design content that sticks out above the rest. Reddit unfortunately seems to be no easier an SNS to gain traction with than it was last year, with unwelcoming users and a general sense of anonymity across the site.

X (previously twitter) has provided us with strong results recently, but new changes and minimum budgets means we expect instability over the next year. It is still a worthwhile platform to consider, but the management changes it is undergoing are enough for us to be wary.

Google as a search engine is losing popularity, but it does have an unbeatable reach and loyalty from its users. Gen Z are turning to social media more and more for their research though (see charts 11 and 12), so well designed organic SNS profiles are going to speak for your institution as much as your website.

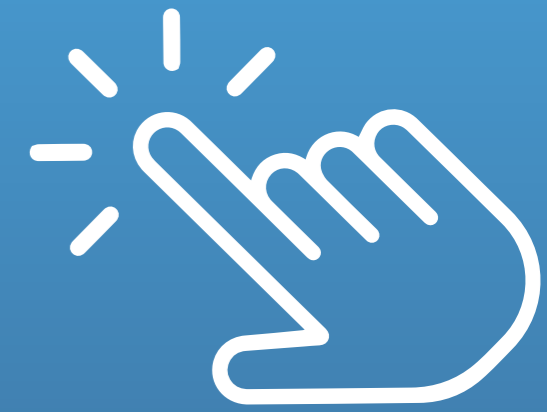
TV is an expensive way to reach youth cohorts, and attention must be paid towards chosen channels and shows to advertise around. For example, Channel 4 poses itself as a great place to reach Gen Z. Radio surprisingly still has some

sway, and this route does offer great selections for location targeting, so long as the ads are well placed to suit the times when this generation will be listening in. Spotify is developing an ads studio that will allow advertisers more opportunities to reach the demographic, who spend a lot of time relaxing with music or podcasts. This is in itself a positive sign in the future of audio advertising.

Sponsored content, AKA influencer advertising, is a great way to influence large numbers of users through diverse content created by a chosen spokesperson. It builds brand trust and creates a lasting impression for Gen Z. By selecting a smaller influencer, you will experience high engagement rates, but a larger influencer with a higher reach may not provide the same levels of influence, as they are deemed as less honest.

Overall, none of this will work if you don't address the social causes this generation is concerned with or offer support on both a financial and emotional level. Youth cohorts are dealing with mental illness, a cost-of-living crisis, and the fallout from the pandemic. If they don't see you openly navigating gender and racial disparity, or offering services to struggling students, they will find somewhere they perceive as more welcoming. It's time to be at the top of your game!

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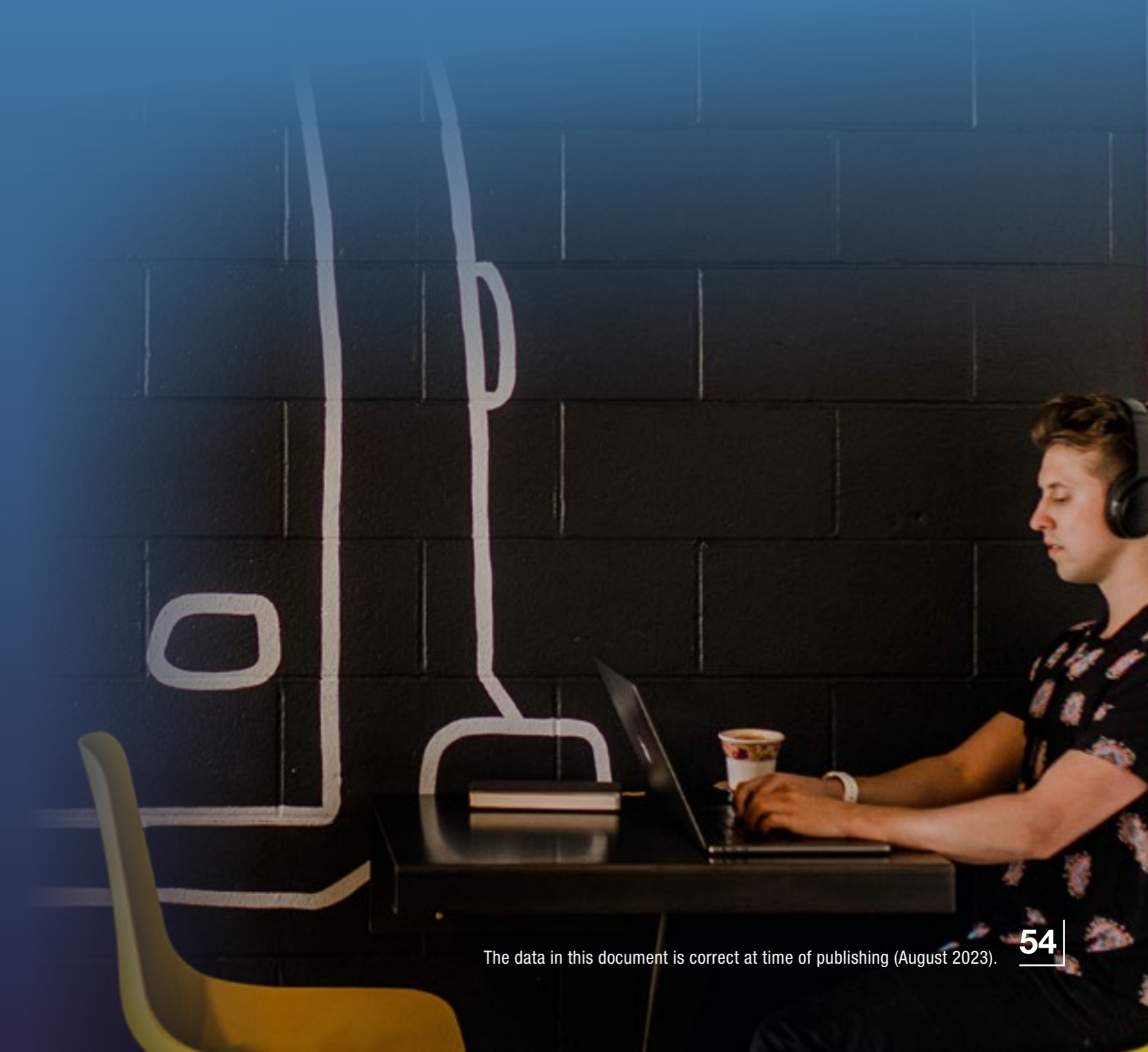


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