



STUDENT HUT

YOUTH
INSIGHTS
REPORT

Brand, Platform Trends and the Student Audience

JUNE 2018

“The TripAdvisor
for universities”

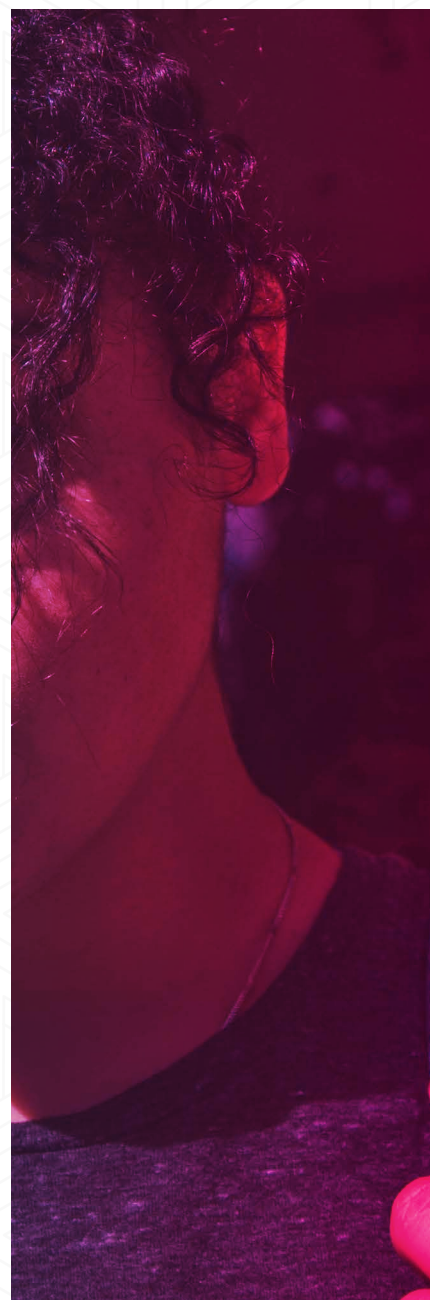
BBC

“Most useful website
for students”

i100

STUDENTHUT.COM

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ABOUT THE REPORT

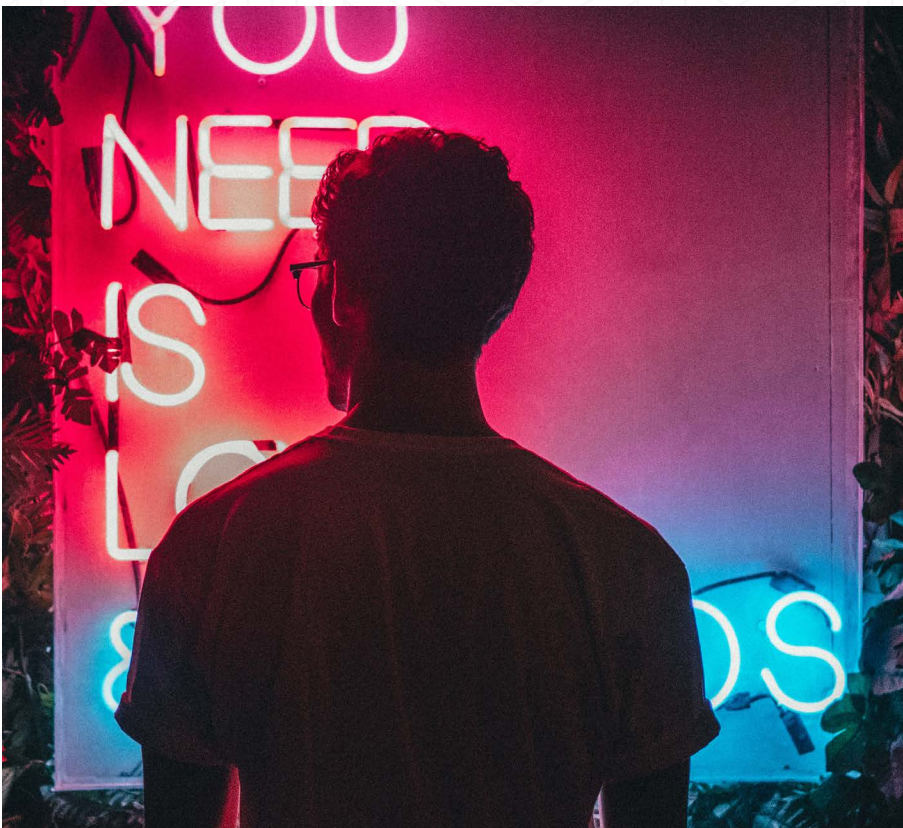
The Youth Insights Report: Brands, Platform Trends and the Student Audience was launched to better understand how students and youth audiences are using social media in the context of their interactions with brands. This independent survey is one of the biggest of its kind.

The report is part of a new initiative to regularly survey the student audience and understand their views and opinions on a wide range of issues, which in turn can be used by brands to inform their student marketing strategies. The Youth Insights Report surveyed the Student Hut Opinion Panel, analysing over 165,000 data points and conducting 1,678 deep-dive qualitative surveys with a predominantly UK based student audience. The numbers have been crunched, and the results have been analysed by the expert audience insight and conversion practitioners at Natives Global Consulting. The results are jam-packed with insights, and presented here by Student Hut.

Where appropriate, the data has been segmented into three different student groups; 6th form/college, university student and university graduate, so that insights and recommendations can be made by brands themselves, depending on which audience they want to communicate with.

This report will provide decision makers, senior marketers, and market research professionals with detailed insights and recommendations to:

- + Gain a deeper understanding of online trends and behaviours
- + Help decide where to prioritise their marketing efforts
- + Tailor content for the 2018 student audience
- + Decide which channels are most appropriate for marketing, sales or customer service
- + Understand the pitfalls brands should avoid if they want the student audience to stay engaged



THE METHODOLOGY

The Youth Insights Report was distributed to all opted-in, registered students on the Student Hut Panel.

The survey was open for two days between 22/2/18 and 24/2/18. Deep-dive, qualitative interviews were conducted with 1,678 respondents. Equal weighting was given to each participant's response.

The survey was built and analysed by the Insights and Research Division at Natives Global Consulting; the team behind the National Clearing Survey, Edurank and the European MBA Survey.



KEY FINDINGS

01

A significant majority of the respondents, over two thirds, already follow a brand on social media. The main reason they follow brands on social is to 'be entertained', which just edges out 'discounts or vouchers' as the number one reason.

02

More people want to see brand and friends/family content split. This is a warning sign for brands. If social media channels choose to do this, the survey indicates that the large majority of students won't actively seek out brand content in another feed.

03

Content consideration around engagement differs between genders. Females are twice as likely to follow brands on social media 'to be inspired', while males are more likely to follow brands on social media for 'entertainment'.

04

Apart from being racist or offensive, being repetitive on social media is most likely to turn off student audiences to brands, followed by a 'lack of presence' and 'click baiting content'.



05

Twitter is vulnerable. If asked to delete one app from their phone, Twitter was overwhelmingly the top choice for the cut. However, the app still has an important utility; it is considered the top choice for making a customer service enquiry.

06

Almost two thirds of students expect a response from a brand within 24 hours. With half either 'unlikely' or 'very unlikely' to use the brand again if they did not receive a prompt response.

07

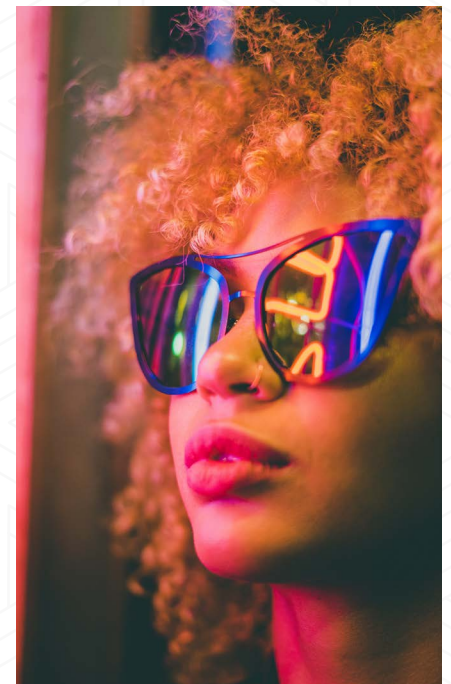
Email is certainly not dead and is considered the most effective form of communication for students to contact a brand, followed by Facebook and Instagram.

08

'Customer reviews' has overtaken 'friends and family' as the most important influencer in decision making. Has influencer marketing been overblown? The survey found that 'social influencers' are the least relevant when making purchasing decisions.

09

A brand's ethics are important to students. Treating employees fairly, animal welfare and ethically-purchased products are all things that influence students' buying behaviours. If your brand adopts these ethics, you could make a positive impact by highlighting this in your messaging and brand story.



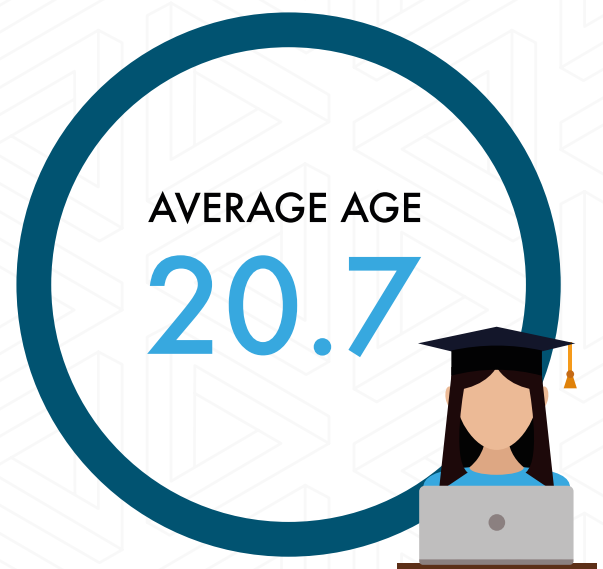
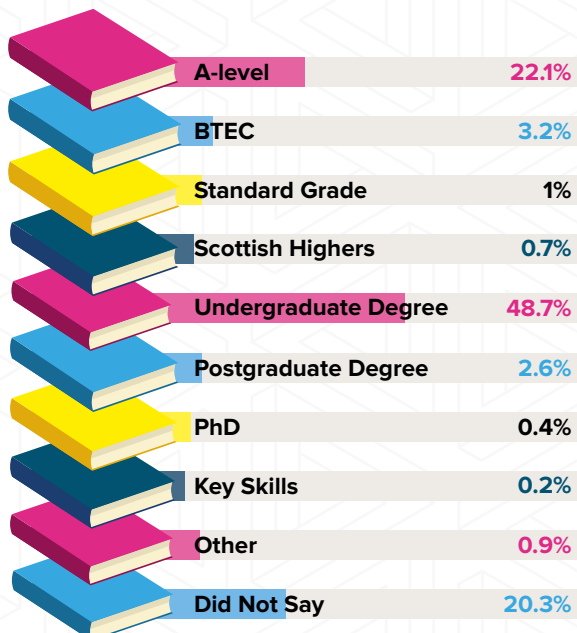
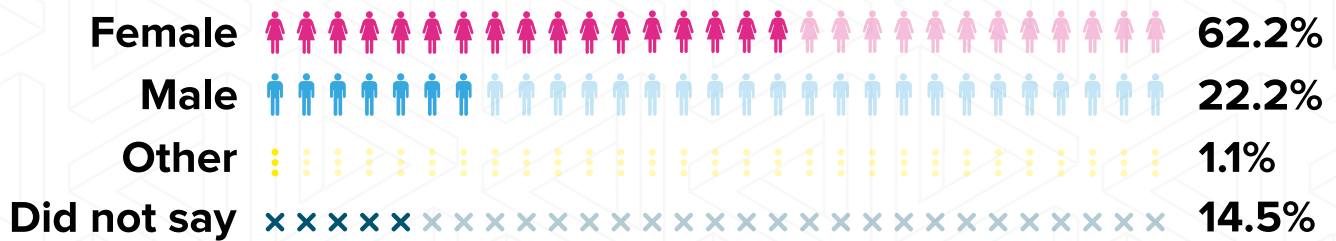
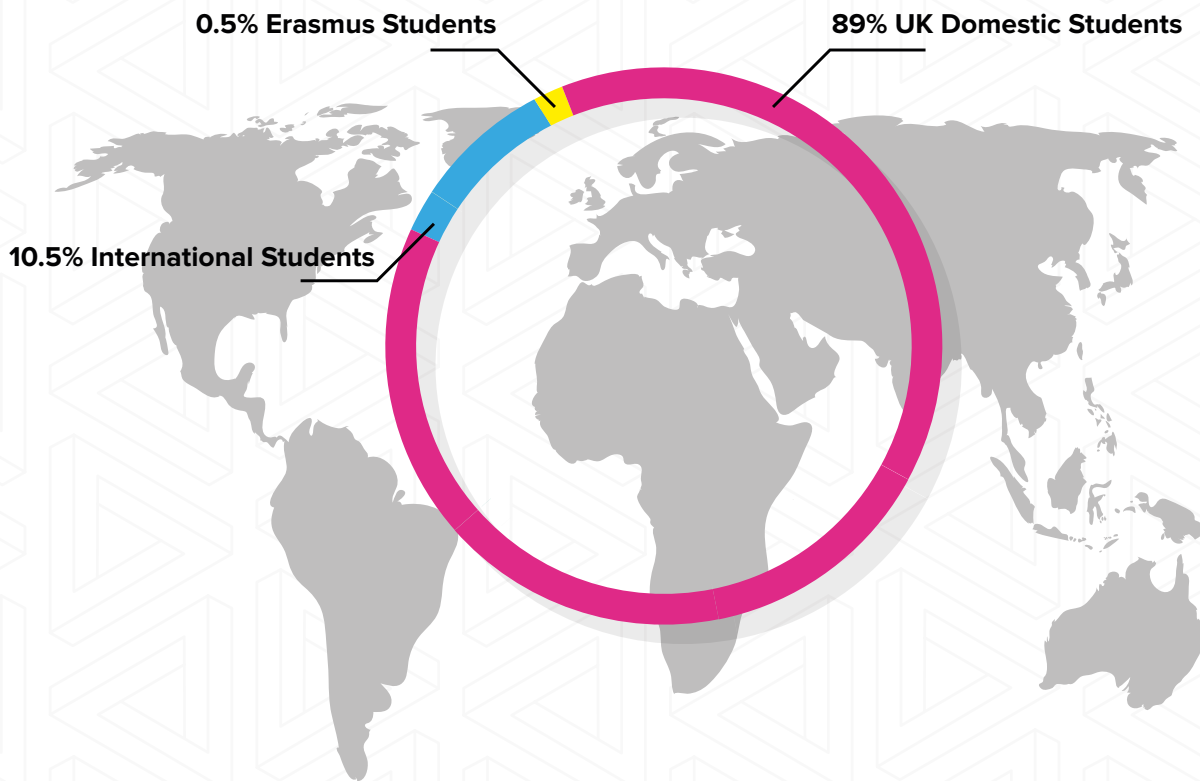
DEMOGRAPHICS

LOCATION OF OUR PANEL (UK ONLY)



WHO DID WE SURVEY?

The make up of our deep-dive interview respondents



PLATFORM TRENDS

PLATFORM TRENDS AND THE STUDENT AUDIENCE

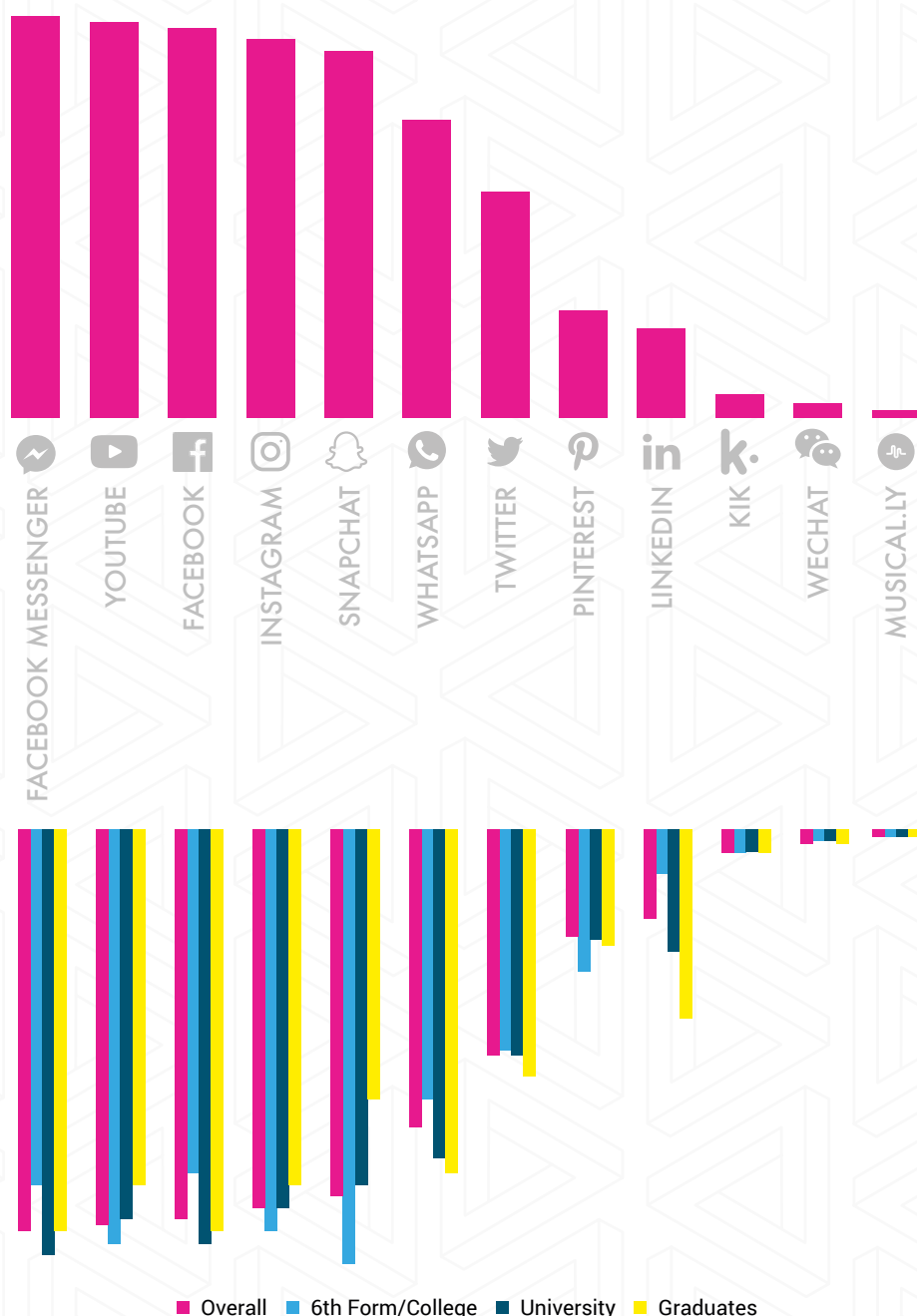
HOW OFTEN DO YOU USE THE FOLLOWING SOCIAL MEDIA NETWORKS OR PLATFORMS?

Overall, Facebook Messenger was the most popular app

Younger audiences like active/visual content like Snapchat and Instagram

Overall, the survey found that Facebook Messenger is the social media platform used the most by the demographics surveyed, followed by YouTube, Facebook and Instagram.

When comparing social media usage by education level, there are some interesting variations. Students at school and further education use Snapchat the most compared to higher education students and graduates who stated Facebook was their go-to social media platform.



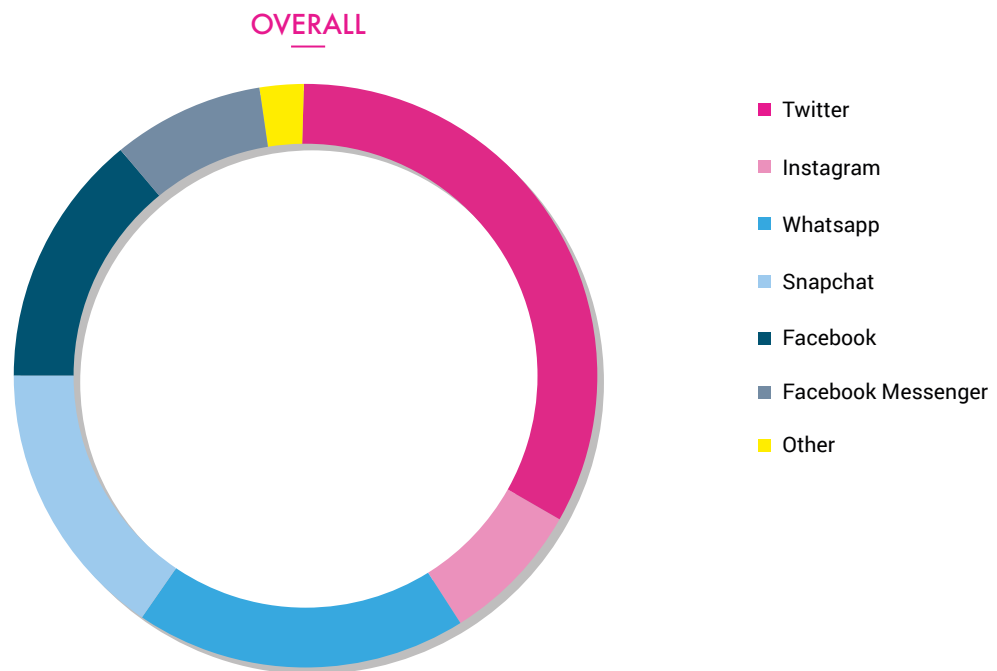
PLATFORM TRENDS AND THE STUDENT AUDIENCE

IF YOU HAD TO CHOOSE ONE APP TO DELETE FROM YOUR PHONE RIGHT NOW, WHAT WOULD IT BE?

Twitter would be the one app students could easily live without, with 33% of the overall respondents indicating that this would be the app to delete from their phone.

Instagram appears to be the least likely app to be deleted, with only 8% of all respondents selecting this app.

When considering the choices



Twitter was voted the most deletable app along with Snapchat and WhatsApp

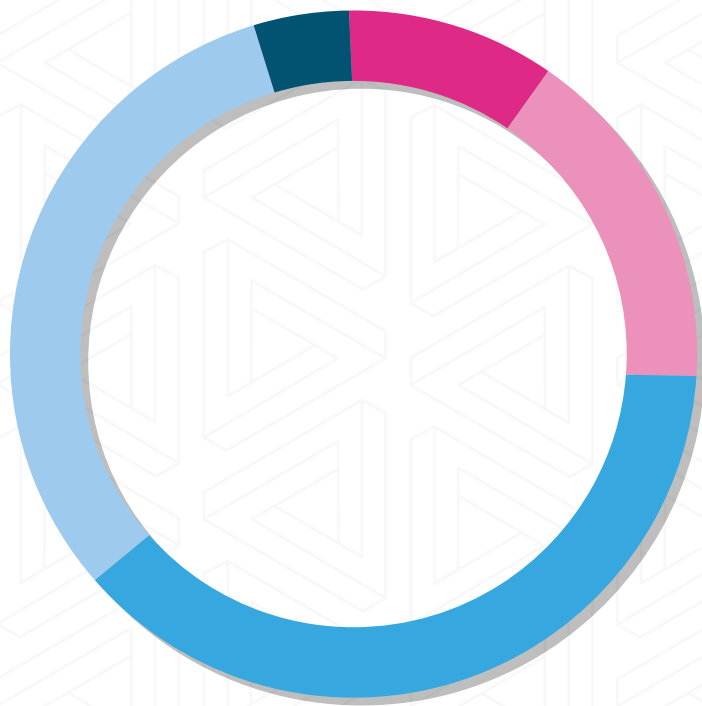
made by those at different education levels, there are both interesting differences, as well as similarities when it comes to the apps students would delete from their phones.

Twitter was unanimously the most common app that respondents would delete, no matter their education level. However, between students in higher education (18%) and graduates (25%), Snapchat

was the second most commonly selected app to delete. But for students still at school or college, 24% would choose to remove WhatsApp from their phones.

When respondents were asked their reasons for choosing any of these particular apps to delete, the most common reasons were because they either don't use the app at all or they don't use it often enough to justify keeping it.

HOW WOULD YOU FEEL IF NEWS FEEDS WERE SPLIT BETWEEN FRIENDS/FAMILY AND BRANDS ON FACEBOOK?



- Hate It
- Annoying
- Meh
- I quite like it
- Great! I've been waiting for this

More people want to see brand and friends/family content split, rather than kept together. Facebook's decision to not split the newsfeed is

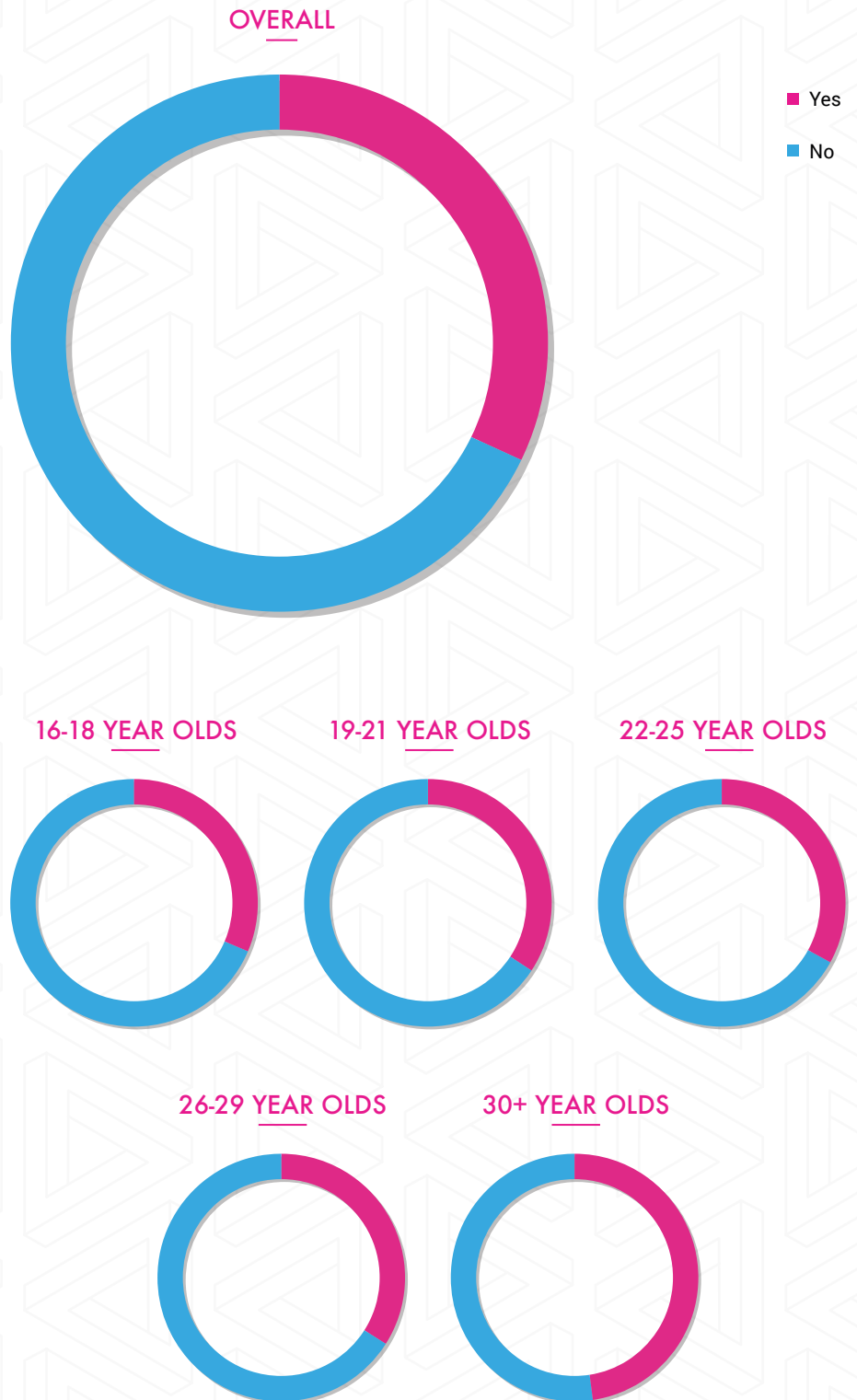
a big relief for brands as the survey indicates that the large majority of students wouldn't actively seek out brand content in another feed.

PLATFORM PREFERENCES

WOULD YOU GO TO ANOTHER FEED TO CHECK OUT BRAND POSTS?

Overall, 36% of respondents reacted positively to the possibility of Facebook splitting its News Feed. However, when asked if they would actively use the second News Feed if Facebook did roll out this change, 68% of respondents said they would not.

When this was broken down by age group, it's interesting to see that those who are 30+ years old stated they were most likely to use and visit Facebook's proposed second News Feed. Whereas, 16-18 year olds were the age group least likely to visit a second brand focused feed.



68% of respondents indicated that they would not actively go into another feed to check out brand posts

FINAL FINDINGS PLATFORM TRENDS

01

Overall, Facebook, Facebook Messenger and YouTube were the most used social media platforms.

02

Snapchat and Instagram were more popular with those still at 6th form/college compared to university students and graduates.

03

A third of respondents would delete Twitter if asked to delete one app from their phone right now.

04

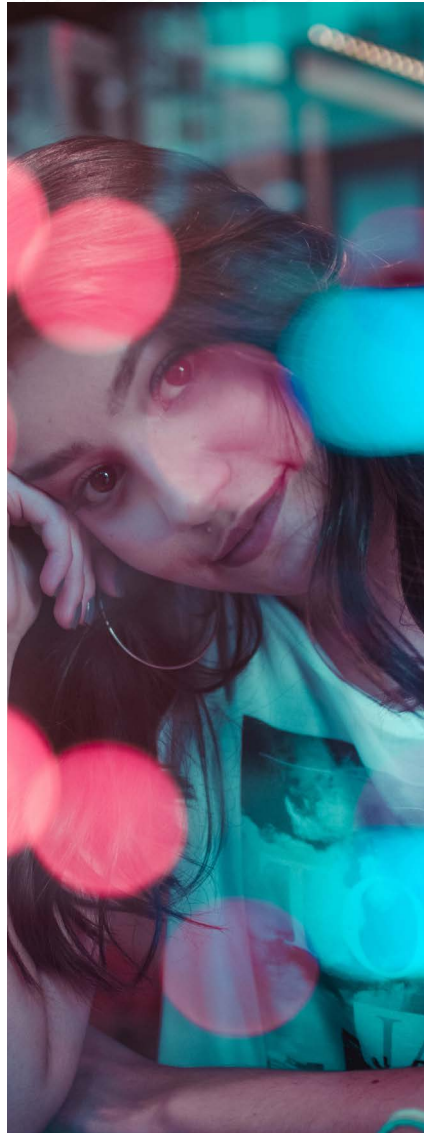
If respondents could only use one app for the rest of their lives, Instagram, Snapchat and Facebook were their preferred choices.

05

71% of respondents indicated that they do follow brands on social media.

06

Females are twice as likely to follow brands on social media to be inspired, with males more likely to follow brands on social media for entertainment.



07

Just over a third responded positively to the possibility of Facebook splitting the news feed into one for businesses/brands and one for friends/family.

08

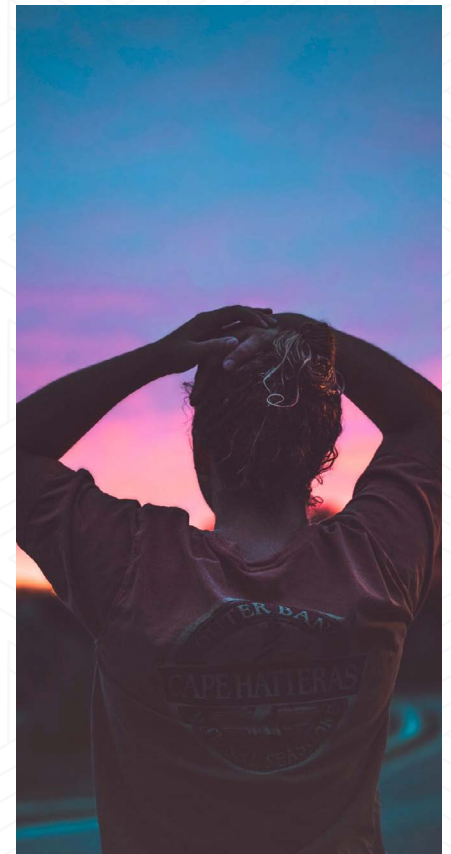
68% of respondents would not actively go into another feed to check out brand posts if Facebook did implement this change.

09

For those who indicated that they would go into another feed to look out brand posts, the most common reason was because they felt it was a good way to keep up with discounts/promotions and special deals on products

10

For those who indicated that they would not go into another Facebook feed to check out brand posts the most common reason was because they were not interested at looking at brands on Facebook and didn't use Facebook to actually follow brands.

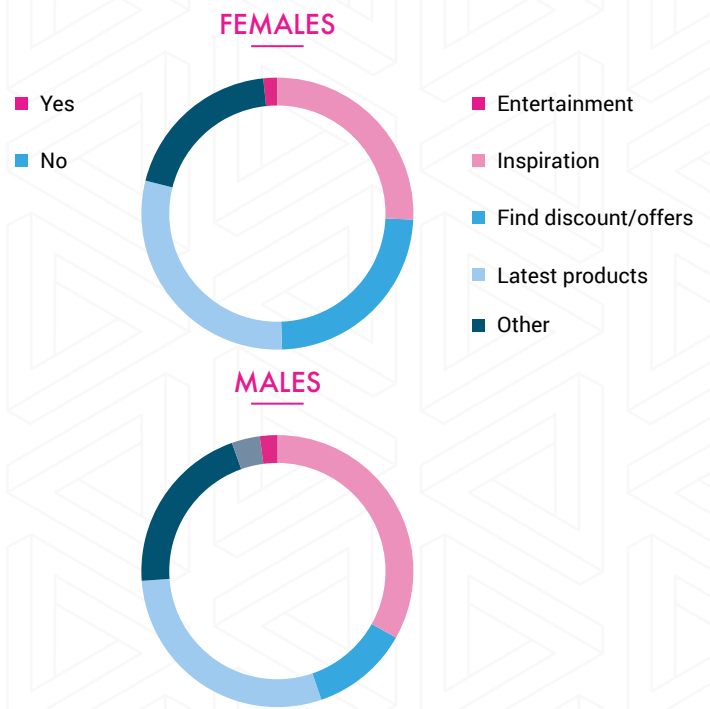
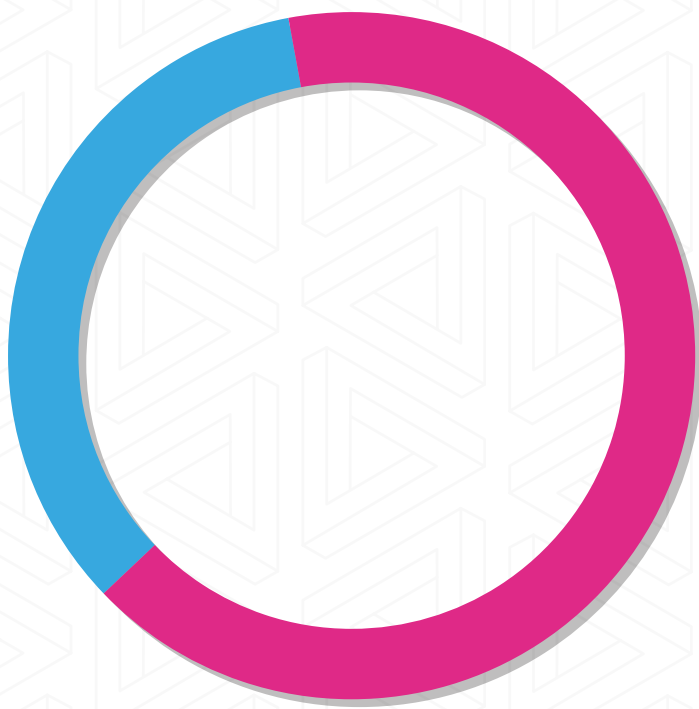


BRAND TRENDS

BRANDS ON SOCIAL MEDIA

DO YOU FOLLOW A BRAND ON SOCIAL MEDIA?

AND WHY?



The most popular reasons for following a brand on social media for both sexes are inspiration and finding out about latest products.

WHY WOULD YOU UNFOLLOW A BRAND ON SOCIAL MEDIA?

1. Content that is offensive, sexist, or racist
2. Irrelevant or boring content
3. Too many promotional posts
4. Visually unappealing content
5. Posting all the time



Overall, the survey found that offensive, sexist or racist content is the most likely reason for respondents to unfollow a brand on social media, followed by irrelevant or boring content.

When asked if there were any other reasons for unfollowing a brand on social media, repetitive posts was mentioned a lot, followed by inactivity and the use of clickbait style posts.

Offensive content would have the biggest impact, resulting in unfollowing a brand

BRANDS ON SOCIAL MEDIA

WHAT ARE YOUR FAVOURITE BRANDS?

FEMALES

NEW LOOK MISSGUIDED
LOOK TOPSHOP



H&M

"Their commitment to the environment and innovative products."

NIKE

"Are we considering clothes? if so, Nike has always been my favourite since I was young."

MALES



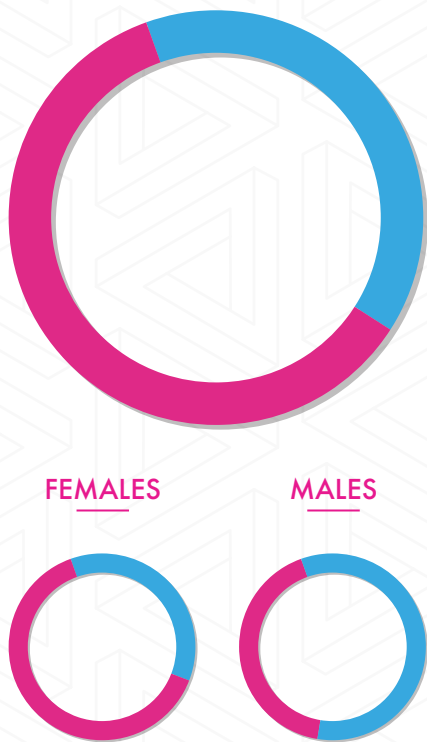
When asked to state their favourite brands, ASOS, Nike, Amazon, Apple and Adidas all appear in the top ten brands for both females and males.

When asked why these were their favourite brands, themes such as 'great service', 'having a large range of products', 'product quality and style' and

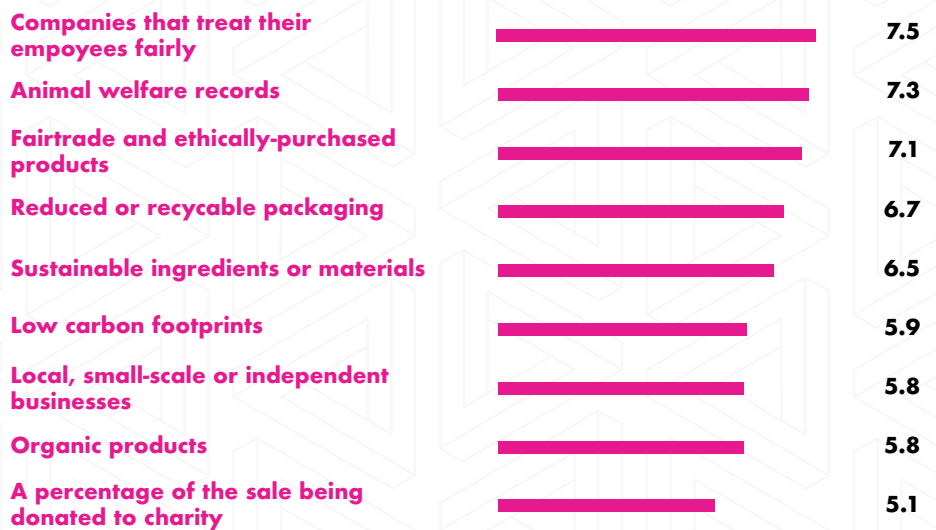
'affordability/value for money' were consistent among both males and females.

BRANDS ETHICS

DO YOU CONSIDER ETHICAL FACTORS WHEN MAKING A PURCHASE?



■ Yes ■ No



When asked, 60% of respondents stated that they do consider a brand's ethics when making a purchase. It's interesting to see that when analysed by gender, females are more likely to contemplate ethical factors when making a purchase compared to males.

Overall, 'companies that treat their employees fairly',

'animal welfare records' and 'fair-trade and ethically-purchased products' were the most important factors students consider when choosing which brands to use.

When asked which actions would prevent them from purchasing a product or using a brand, both female and male respondents indicated that

'racist, sexist or insensitive advertising' would be the most likely action to prevent them using a brand.

Females scored each of the actions considerably higher than males did, indicating that each of these actions would be more likely to prevent females from purchasing a product or using a brand than males.

PURCHASING HABITS AND INFLUENCERS

WHAT ARE THE BIGGEST INFLUENCING FACTORS PRIOR TO PURCHASE?

1. Reviews
2. Recommendations by friends
3. Recommendation by family
4. Digital advertising
5. Social media adverts
6. Traditional advertising
7. Bloggers/vloggers
8. News and sponsored content on websites
9. Celebrity endorsements

'Customer reviews' has overtaken 'friends and family' as the most important influencer in decision making. Has influencer marketing been overblown? The survey found that 'social influencers' are the least relevant when making purchasing decisions.

When asked about other factors that influence their purchasing, respondents stated price and affordability as the most influential factors.

Celebrity endorsements, news and sponsored content on websites followed by

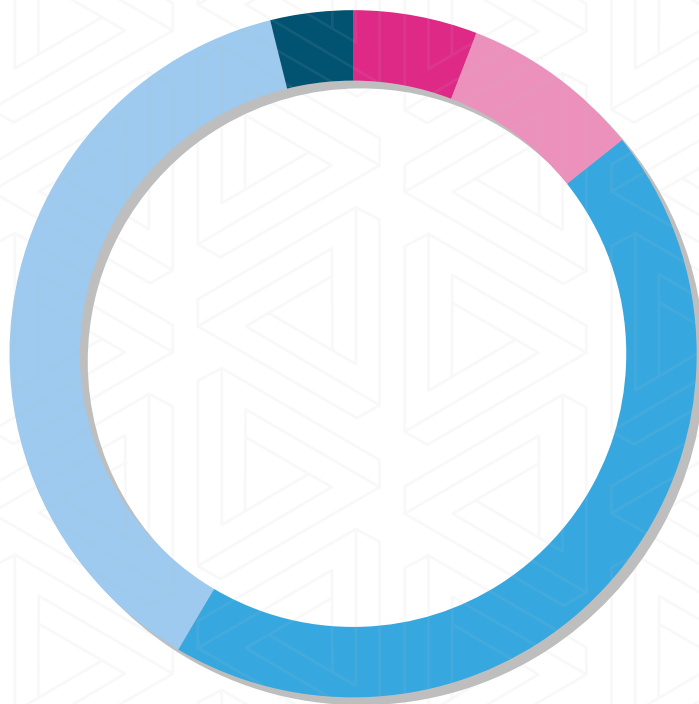
bloggers/vloggers were the least influential factors when students are considering a purchase.

Using the data available, this was then broken down by age group and indicated that, aside from product reviews and recommendations, 16 to 18-year-olds are influenced by digital and social media adverts more so than traditional advertising.

On the other hand, 26-year-olds through to 30+-year-olds are influenced by more traditional means of advertising compared to younger age groups.

Online reviews, along with recommendations from family and friends have the biggest influence, whilst bloggers/vloggers have little to no influence

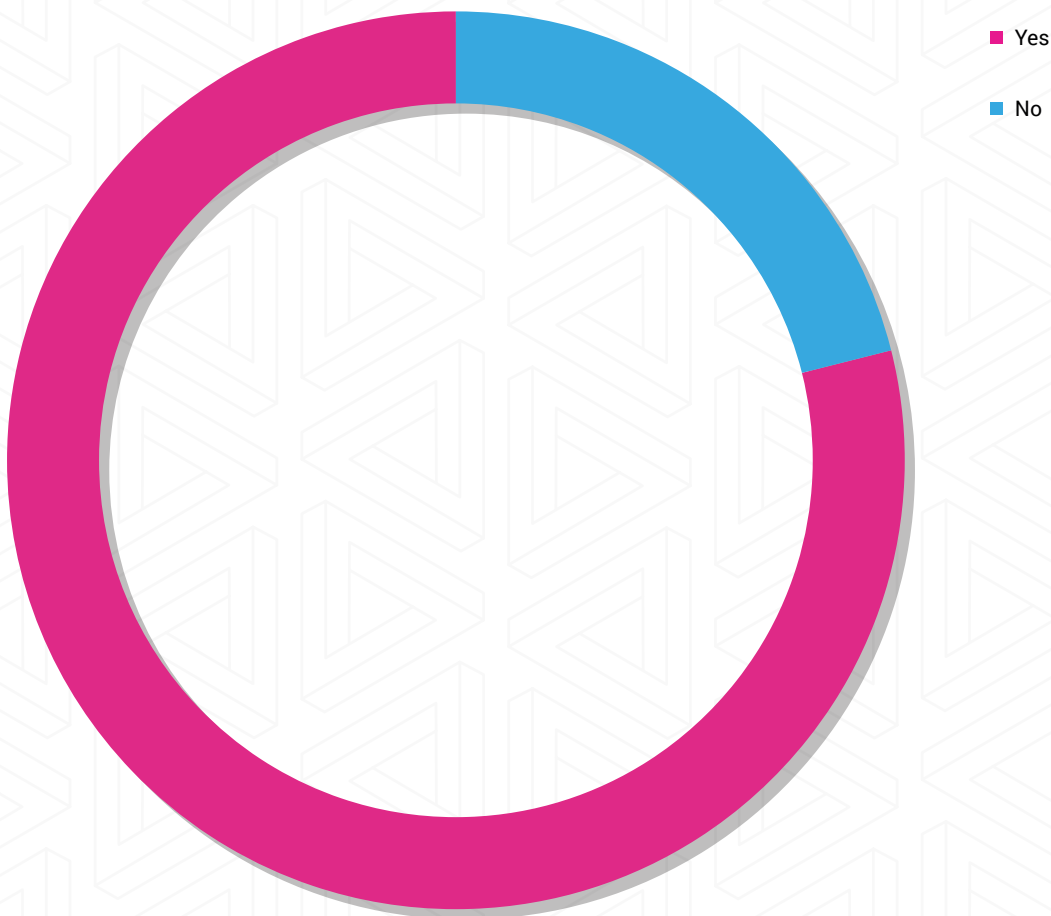
IF A BRAND THAT YOU USE CREATES A CRINGEWORTHY ADVERT, HOW MUCH WOULD THIS AFFECT YOUR DECISION TO PURCHASE?



- Not at all. It doesn't really bother me
- Hardly at all. I don't think it's a big deal not to consult young people
- Not much, I'm not that fussed
- A little. I wouldn't want to use a brand that seemed out of touch
- A lot. I'd never use that brand again

42% indicated that their purchase decisions would be negatively affected if a brand they used created cringeworthy adverts.

**DO YOU THINK YOU
CAN TELL IF A BRAND
HAS TALKED TO HIP,
COOL AND 'WITH IT'
YOUNGSTERS BEFORE
CREATING ADVERTS?**



BRAND COMMUNICATION

THROUGH WHICH MEDIUM DO YOU PREFER TO RECEIVE COMMUNICATION FROM A BRAND?

1. Email
2. Facebook
3. Instagram
4. Post
5. Twitter
6. Text Message
7. WhatsApp
8. Telephone



All age groups and genders shared a clear preference for email communication

The survey also looked at the perceptions of communication channels used by brands. When asked to rank which mediums they would prefer to receive

communication from, all respondents showed a clear preference for email. Telephone and WhatsApp are the least preferred method.

BRAND COMMUNICATION

HOW MANY EMAILS ARE TOO MANY?

	1	2	3	4+	Other
How many emails from a single brand do you consider to be too many in one week?					
Female	5%	27%	41%	26%	2%
Male	8%	32%	40%	19%	1%
Overall	6.5%	29.5%	40.5%	22.5%	1.5%

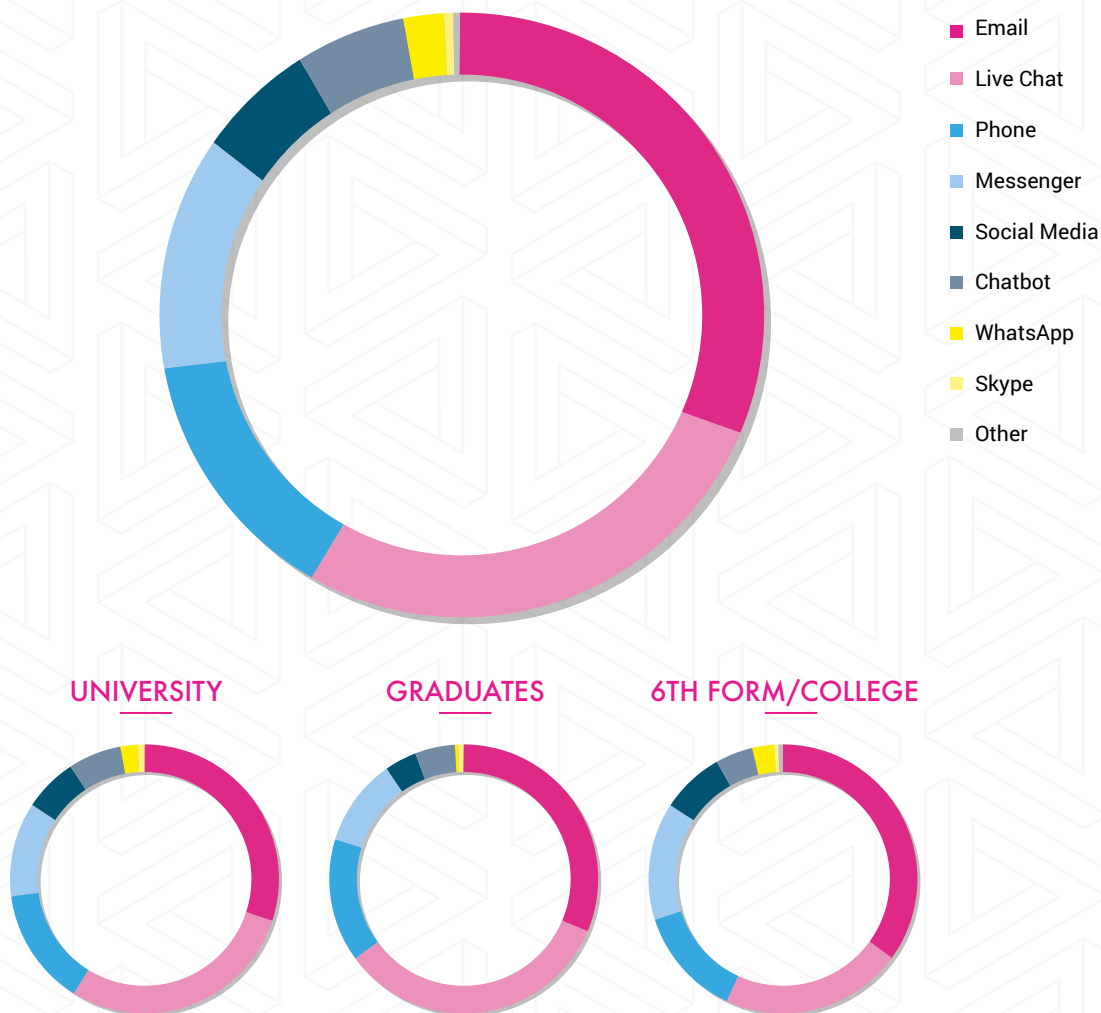
Emails are the clear preference of communication from all respondents, but how many is too many? 96% of students surveyed think that more than one email per week is too many to receive from a brand.

When broken down by age, 30+-year-olds prefer email but were less open to communications via Facebook and Instagram. However, 16 to 18-year-olds are open to receiving communications via social media platforms.

96% of students think that more than one email per week is too many

BRAND COMMUNICATION

HOW WOULD YOU PREFER TO GET IN TOUCH WITH BRANDS WHEN YOU HAVE AN ISSUE OR A QUERY?

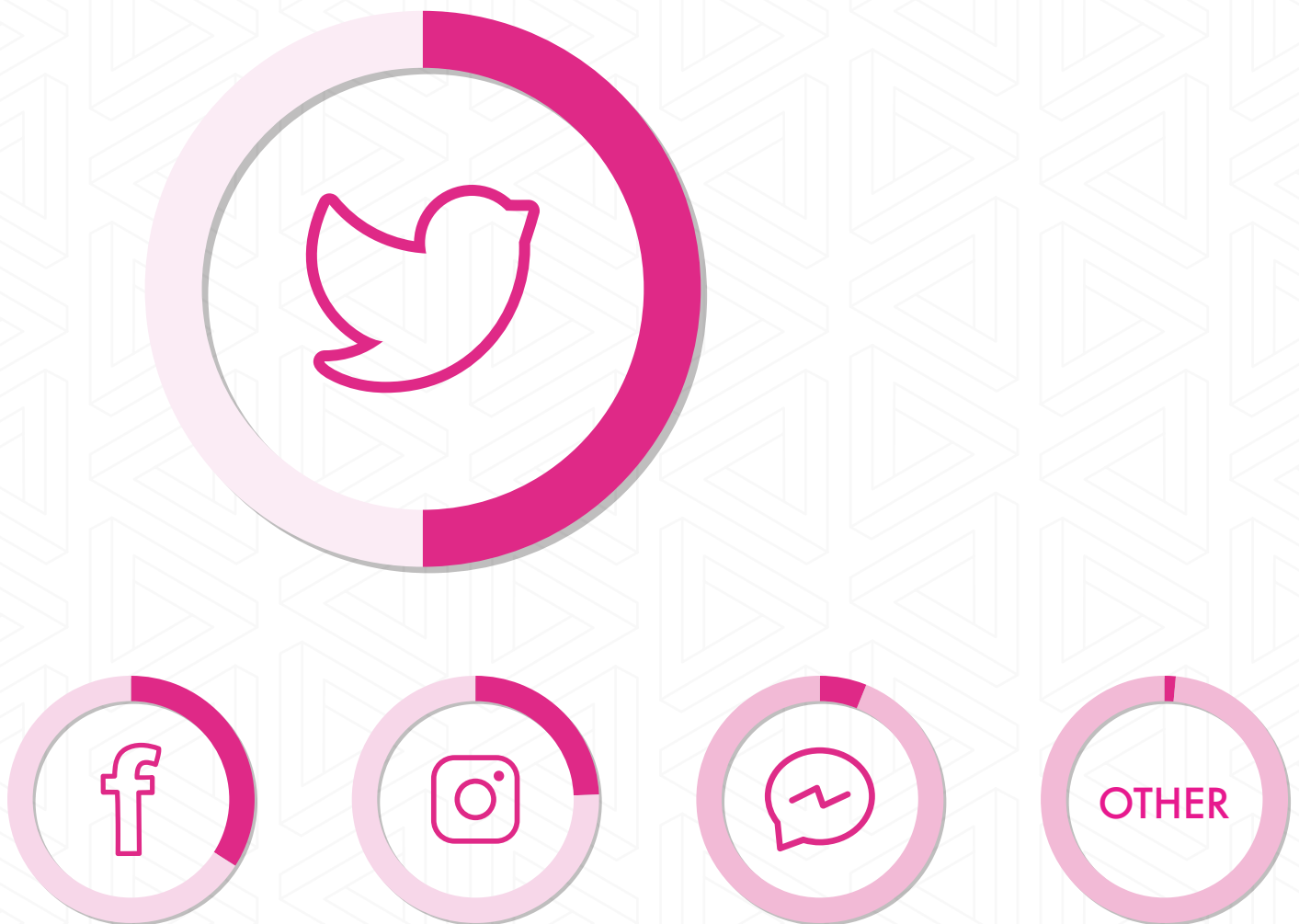


Email is certainly not dead and is considered the most effective form of communication for students to contact a brand, followed by Facebook and Instagram. Overall, 73% of respondents

indicated that they would prefer to use email as a way to get in touch with a brand with an issue or query. Students still at school or college found the option of 'live chat' a lot less preferable

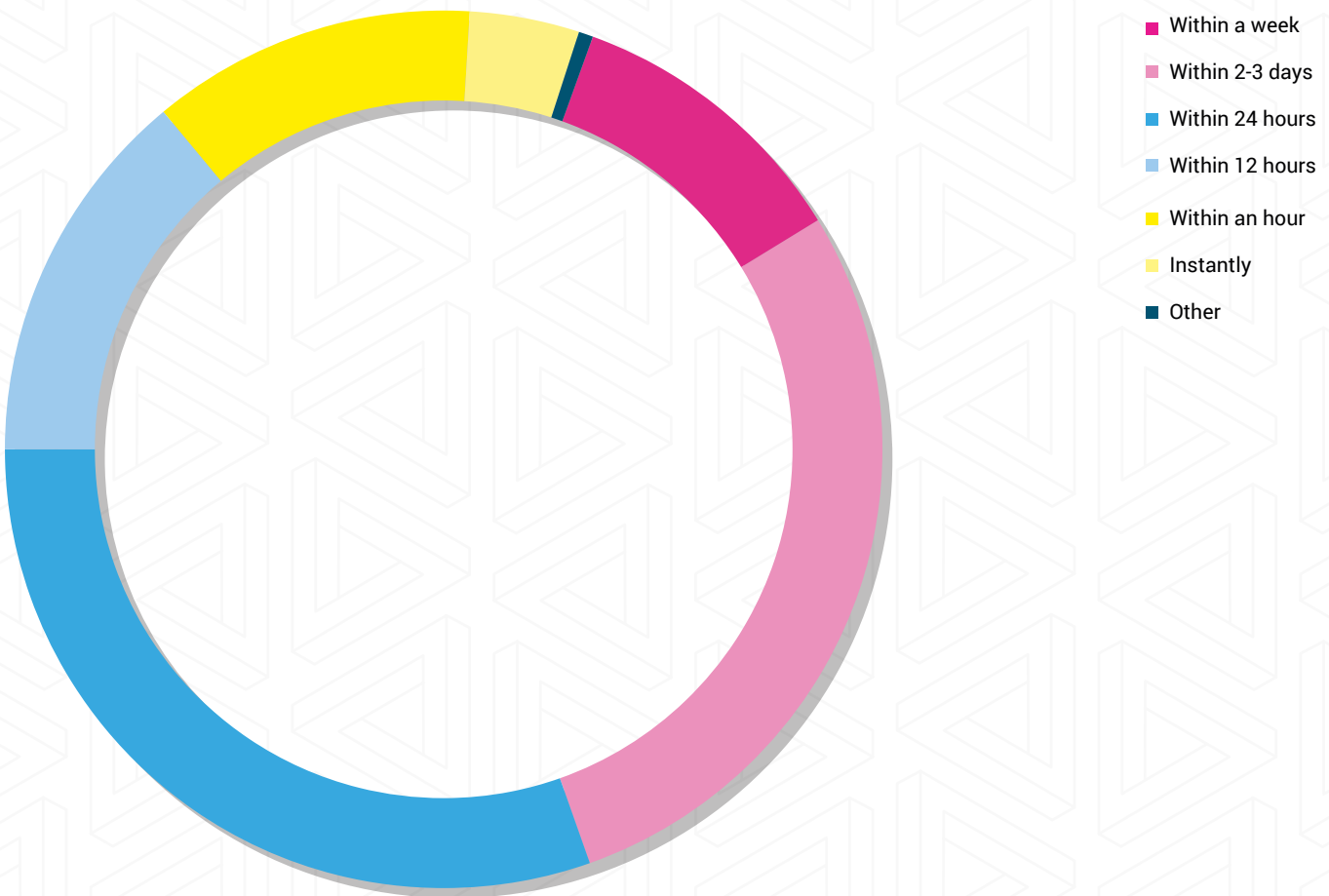
than graduates and those in higher education. Graduates, on the other hand, were less likely to use WhatsApp or social media to contact brands compared to the younger groups.

WHICH SOCIAL MEDIA CHANNELS WOULD YOU USE TO CONTACT A BRAND WITH AN ISSUE OR QUERY?



Despite Twitter being vulnerable, the app still has an important utility; it is considered the top choice when making a customer service enquiry via social media.

HOW QUICKLY DO YOU EXPECT A RESPONSE FROM A BRAND?

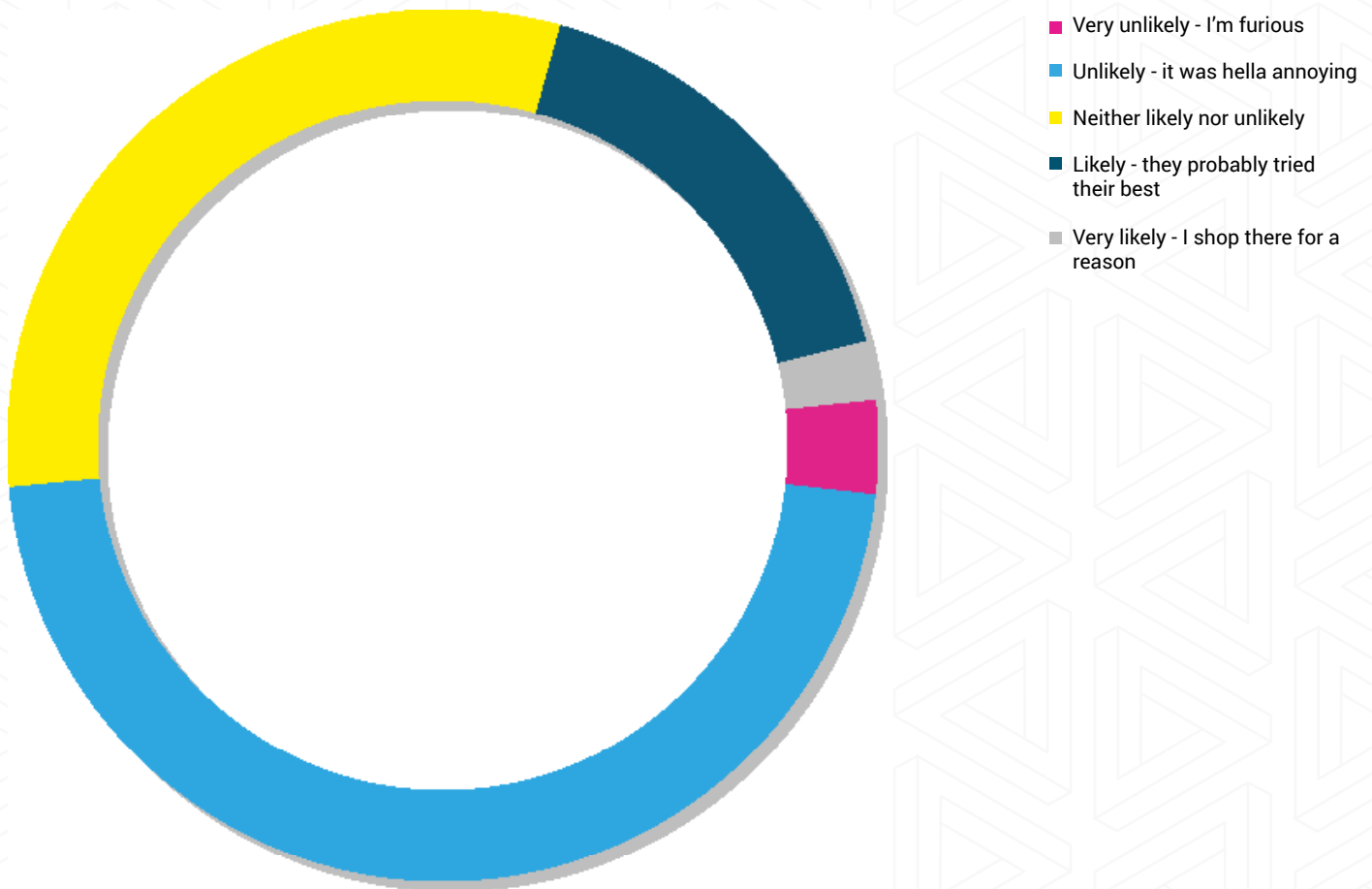


30% of respondents expect a reply within 24 hours

Overall, the majority of respondents expect a response from a brand within 24 hours. Just 4% of respondents expect an instant response, and 12% expect a response within the hour.

BRAND COMMUNICATION

IF THE BRAND DIDN'T RESPOND QUICK ENOUGH WOULD YOU USE THEM AGAIN?



Interestingly when asked if they would use the brand again if they felt the response time was not quick enough, half of all respondents were either unlikely or very unlikely to use the brand again.

FINAL FINDINGS BRAND TRENDS

01

Offensive, sexist or racist content would be the most likely reason for respondents to unfollow a brand on social media.

02

Females are more likely to consider ethical factors when making a purchase compared to males.

03

'Companies that treat their employees fairly', 'animal welfare records' and 'fair-trade & ethically-purchased products' were the most persuasive ethical factors for respondents when choosing which brands to use.

04

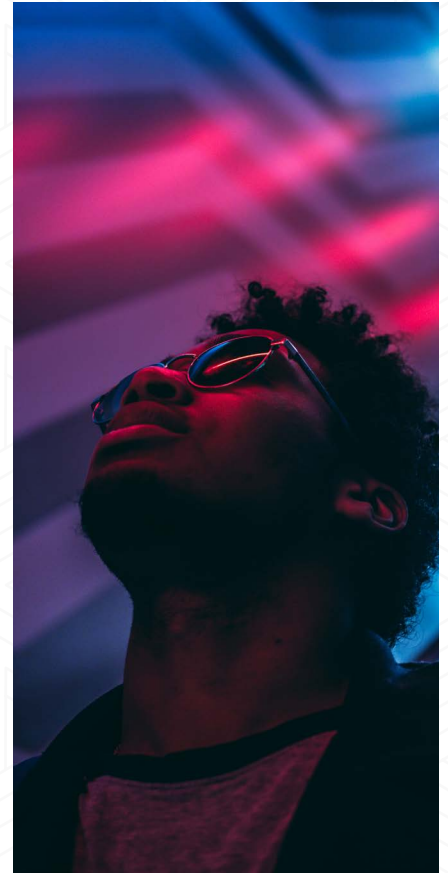
Both females and males indicated that racist, sexist or insensitive advertising would be the most likely action to prevent them from using a brand from the available options.

05

Customer reviews were the biggest influence on what products they buy, followed by recommendations by both friends and family.

06

16-18 year olds told us that they are more influenced by social media adverts and digital adverts compared to their older counterparts.



07

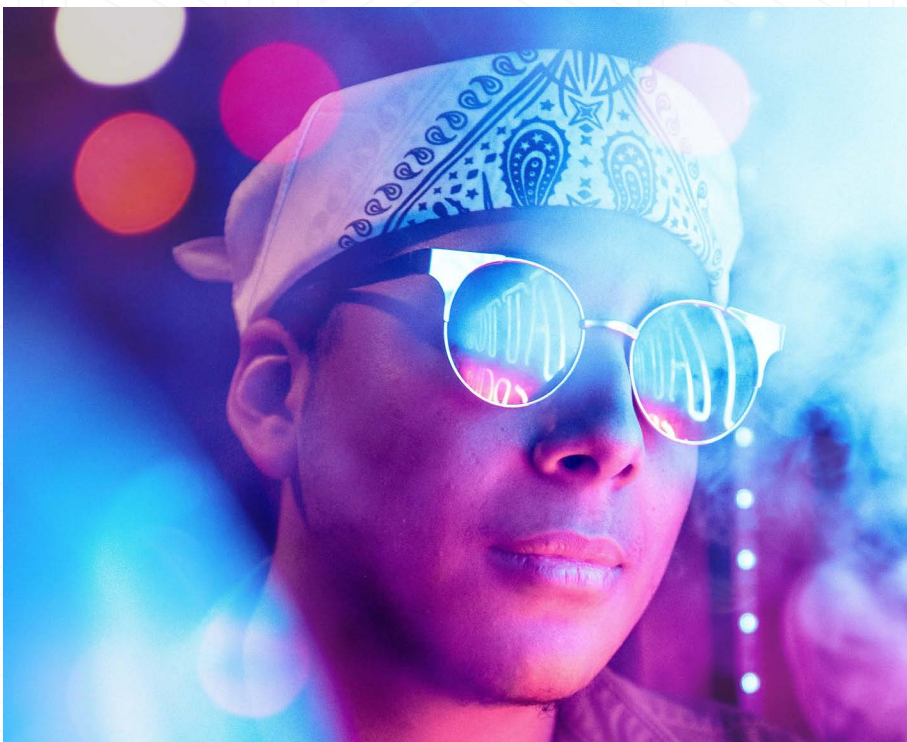
Email was the preferred medium to receive communications from brands, followed by Facebook and Instagram.

08

Females were open to receiving more emails per week than males.

09

Respondents would prefer to use email, over other communication methods, to get in touch with a brand about an issue or query.



FINAL FINDINGS BRAND TRENDS

10

Twitter was the preferred social media channel to raise an issue/query with a brand.

13

Half of the respondents were either unlikely or very unlikely to use a brand again if they felt the the response time was not quick enough.

15

79% of respondents indicated that they can tell if a brand has talked to hip, cool and “with it” youngsters before creating adverts.

11

61% of respondent’s expected a response from a brand within 24 hours.

14

Females preferred clothing brands, for example New Look, Topshop and H&M, whereas males saw technology brands such as Samsung, Sony and Google appear in their top 10 favourite brands list.

16

58% of respondents indicated their purchase decisions would not be affected that much if a brand created cringeworthy adverts.

12

ASOS, Nike, Amazon, Apple and Adidas were the respondents favourite brands.

17

Respondents would rather spend their money on experiences, such as travel and holidays, than alcohol or health and fitness.



THE STUDENT HUT OPINION PANEL

As the leading student review website, we have tens of thousands of impartial reviews on all aspects of student life, from courses to nightlife. Our students love reading reviews and leaving their opinions. We decided to launch the Student Hut Opinion Panel, and give them a voice.

Our panel members deserve to be rewarded fairly for their opinions, so we give every survey respondent a retail voucher.

Our meticulous sign-up process and diligent compliance team ensure that panel members are unique, qualified and enthusiastic. Every member has opted-in in a GDPR compliant and ethical way.



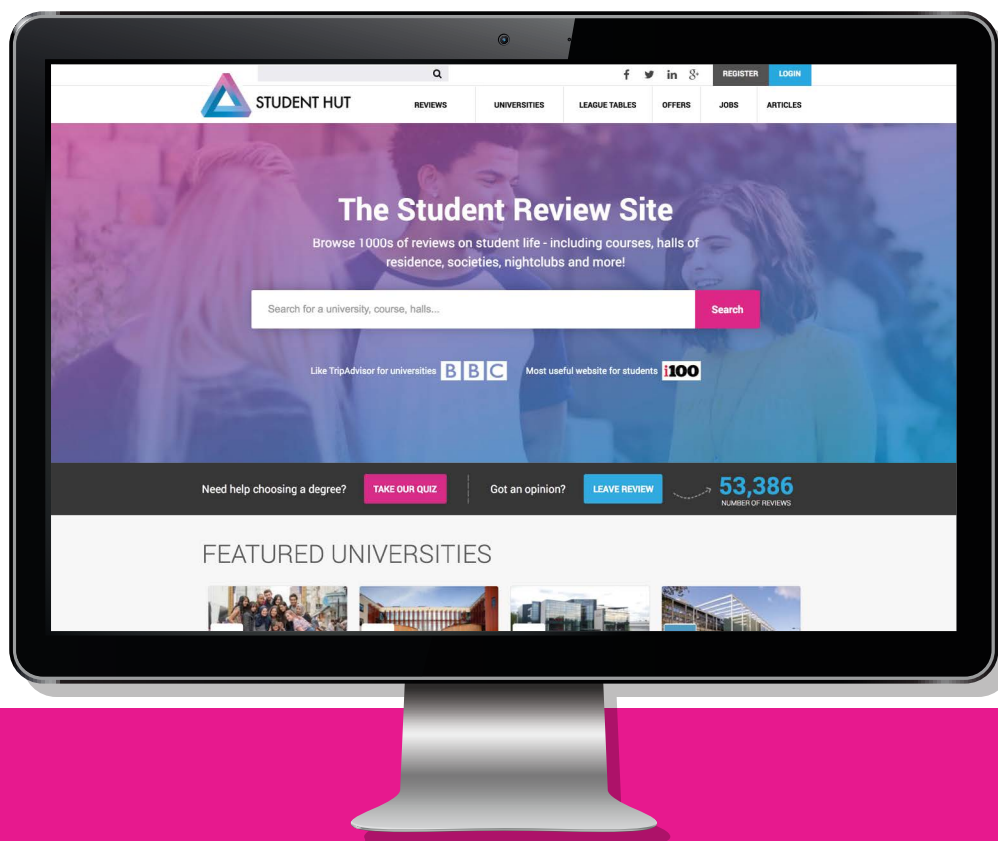
“ [Edinburgh] The scenery is gorgeous and the people you meet are some of the nicest.”



“ [42nd Street, Manchester] Very friendly and welcoming to everyone. Cheap too!!”



“ [Woodland and Downland Halls, Uni of Brighton] I absolutely loved my halls when I was in first year.”





STUDENT HUT

We belong to

NATIVES.GROUP

Contact our experts at insights@studenthut.com or call us on **+44 0207 183 2681** to discuss putting together a bespoke market research project.

