

WHERE ARE THE STUDENTS WE SEE?

A study of representation
in student advertising

STUDENT HUT

November 2019



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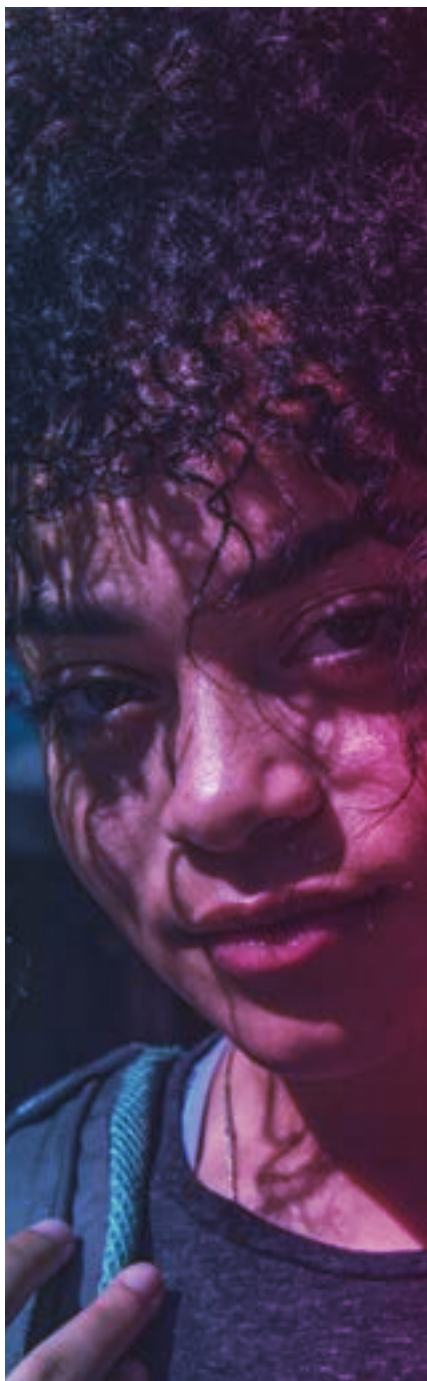


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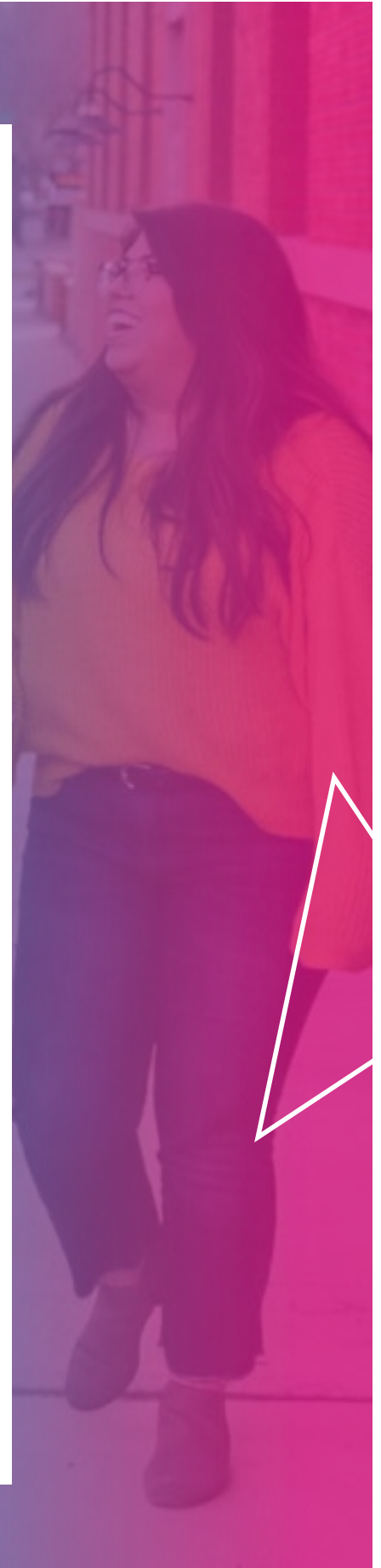
INTRODUCTION

Students make up one of the most diverse consumer groups in the world, yet this isn't reflected in the advertising used by brands or education institutions. The 'students' we see in advertising still fail to represent real students – they're blatantly models who don't belong to the demographic. So, how do real students feel about this?

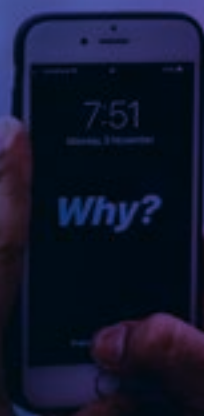
Student Hut and Natives have commissioned new research to find out.

We conducted a deep-dive survey with over 700 of the students on the Student Hut Opinion Panel. They shared how they really feel about the advertising they see every day, how they're being represented, and how that makes them feel about brands.

This report challenges brands, agencies and institutions to think student. And to use data-driven insights to change the way that students are seen in advertising, challenge gender stereotypes, increase diversity and create positive, inclusive campaigns.



DEMOGRAPHICS AND METHODOLOGY



DEMOGRAPHICS AND METHODOLOGY

The survey was shared with our audience of students on the Student Hut Opinion Panel. The survey was open for 48 hours, and deep-dive qualitative surveys were conducted with over 700 students. Equal weighting was given to each participant's response.

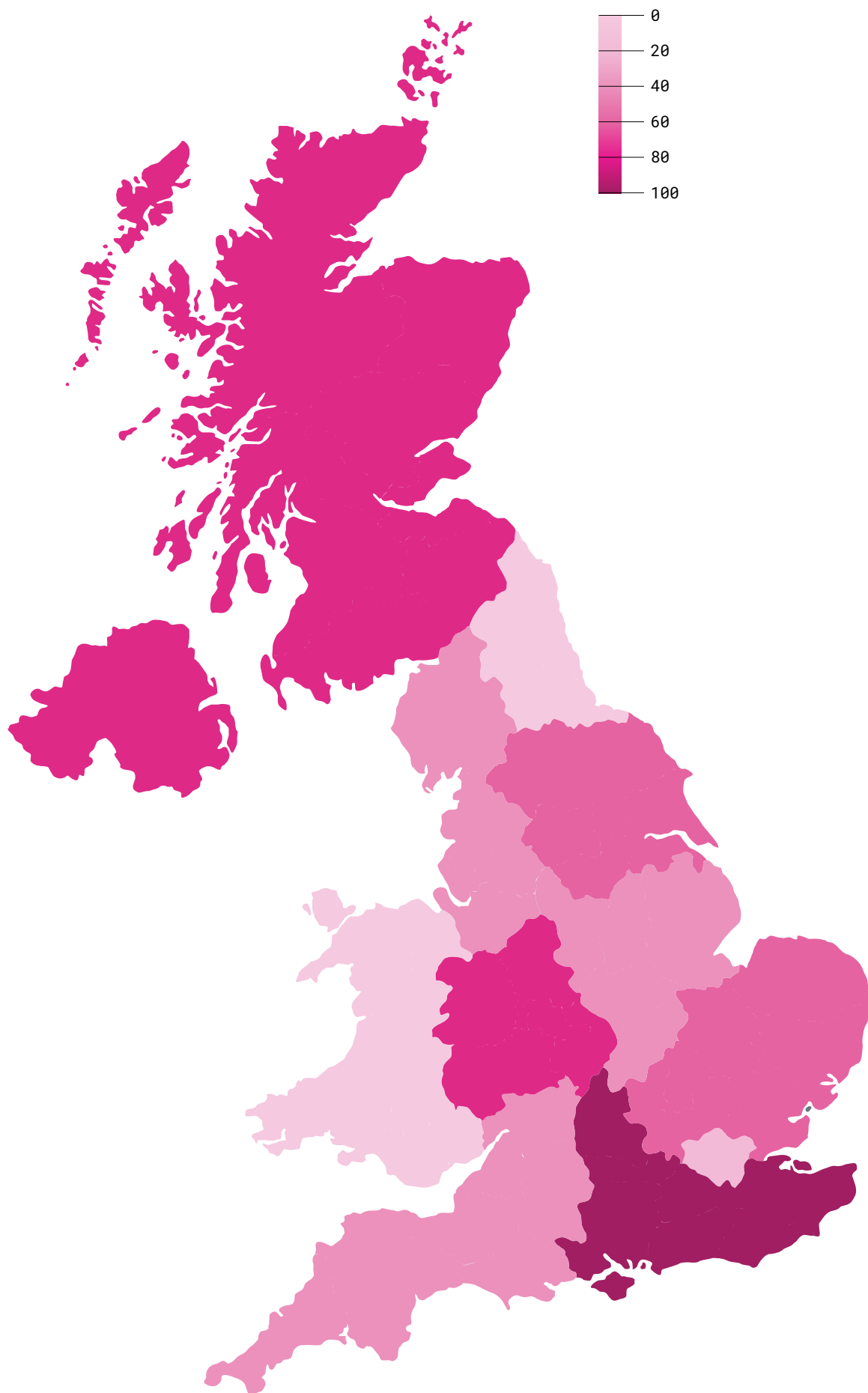
Sample:

- + Aged 16-25
- + Average age of respondent: 19.7
- + Students at 80% of the universities in the UK
- + 90% from the UK
- + Level of study: 30% sixth form/college, 58% undergraduate, 6% postgraduate and 5% graduates
- + A representative split of genders, ethnicities, nationalities and students with disabilities
- + Representative of the UK Higher Education student body

The survey was designed and analysed by the Research division at Natives, the team behind the National Clearing Survey, the European MBA Survey, the Student Media Insights Report and other global research projects. Natives are accredited partners with the Market Research Society, demonstrating a commitment to research and insight excellence.

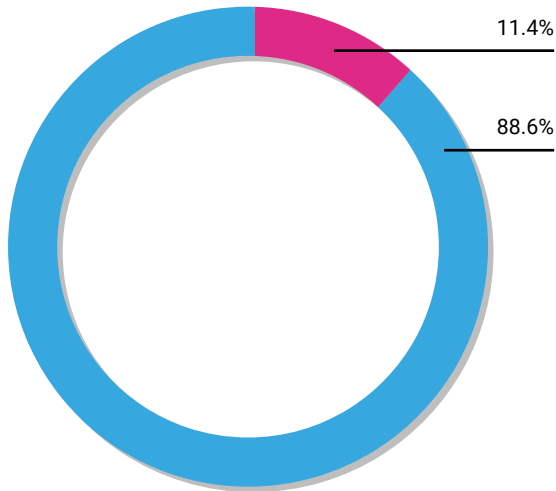


DEMOGRAPHICS AND METHODOLOGY



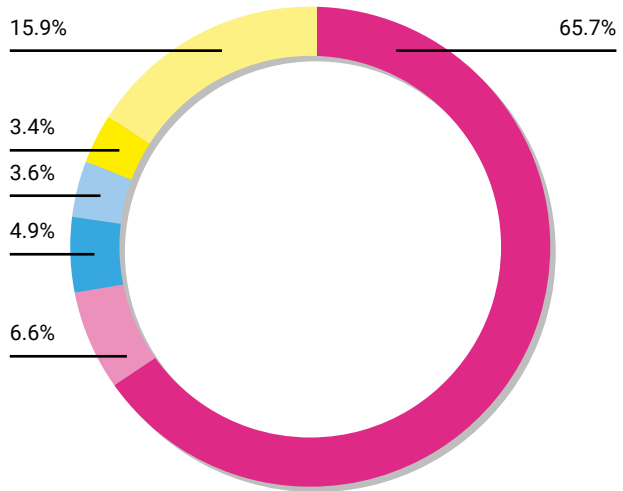
DEMOGRAPHICS AND METHODOLOGY

Disability



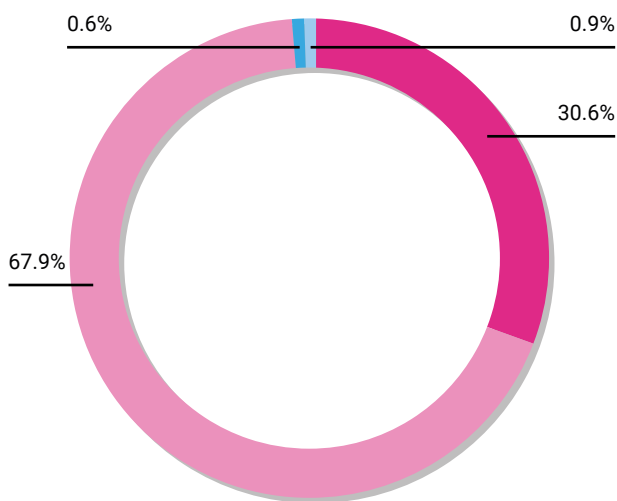
- Yes
- No

Ethnicity



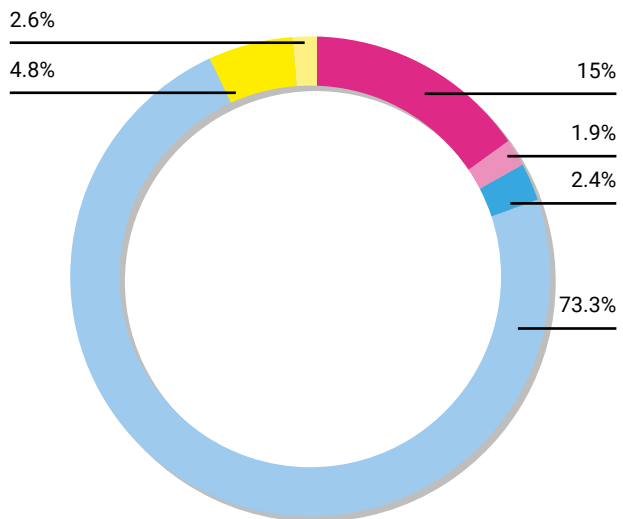
- White - English, Welsh, Scottish, Northern Irish, British
- Asian / Asian British Indian
- Black/African/Caribbean/Black British
- White - Other
- Asian / Asian British Pakistani
- All others

Gender



- Male
- Female
- Other
- Prefer not to say

Sexuality



- Bisexual
- Gay Man
- Lesbian Woman
- Heterosexual
- Prefer not to say
- Prefer to self-describe

HOW REPRESENTED DO STUDENTS FEEL?



HOW REPRESENTED DO STUDENTS FEEL?

Let's start with the big picture: do students feel represented in the advertising that's aimed at them?

From our study, we found that almost one in five respondents never feel represented in student advertising.

1 IN 5 STUDENTS NEVER FEEL REPRESENTED IN ADVERTISING



What does this mean? There are roughly 1.7 million students aged 18-24 in the UK, so this would mean that 340,000 students never feel represented by advertising. This is a huge number, and we need to do something about it.

To break it down further into specific segments, we see that those with a disability are the least likely to feel represented, while students who are from the LGBTQ+ community are also less likely to feel represented in advertising than the average.

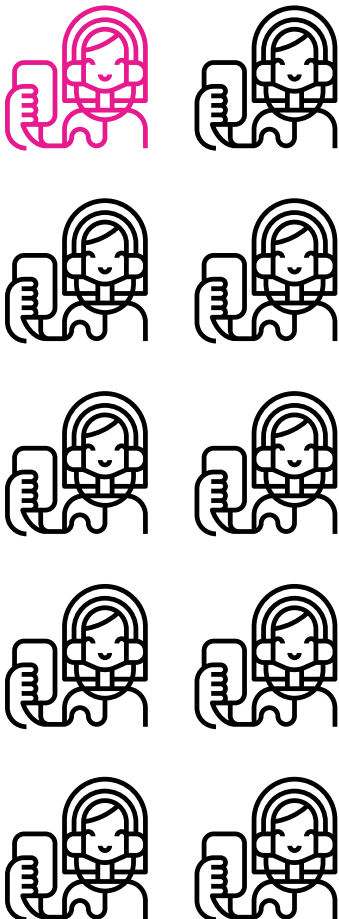
LESS THAN 1 IN 3 STUDENTS FEEL THEIR ETHNICITY OR NATIONALITY ARE REPRESENTED IN ADVERTISING



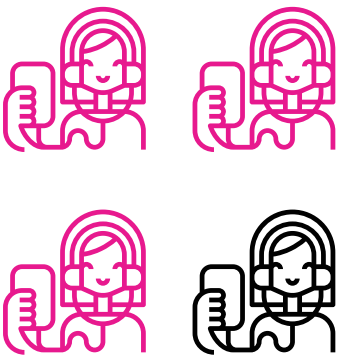
One in three students do not feel that their ethnicity or nationality are represented in advertising, and this reduces substantially to only one in ten BAME (Black, Asian and minority ethnic) students who feel that their nationality is represented.



**ONLY 1 IN 10
BAME STUDENTS
FEEL THEIR
NATIONALITY IS
REPRESENTED IN
ADVERTISING**



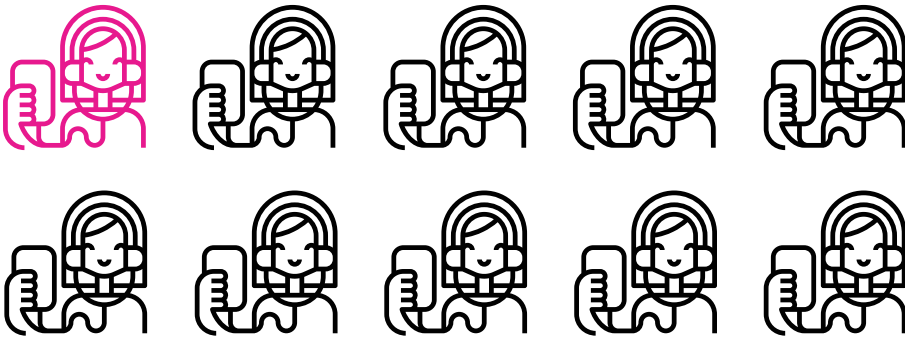
3 IN 4 STUDENTS FEEL THAT THEIR SEXUALITY IS NOT REPRESENTED



Moreover, three in four students didn't feel that their sexuality was represented in the advertising that they saw. And, incredibly, the survey also told us that one in ten students have never seen a 'real person' in advertising (by that we mean someone who isn't a typical model). This all shows that students aren't finding the images in adverts to be authentic.



1 IN 10 STUDENTS HAVE NEVER SEEN A REAL PERSON IN ADVERTISING



So, an extremely high number of students feel that their identities are not being shown in the advertising we're creating. But if they aren't seeing 'real' people, then who are they seeing?



IF STUDENTS AREN'T SEEING THEMSELVES, WHO ARE THEY SEEING?



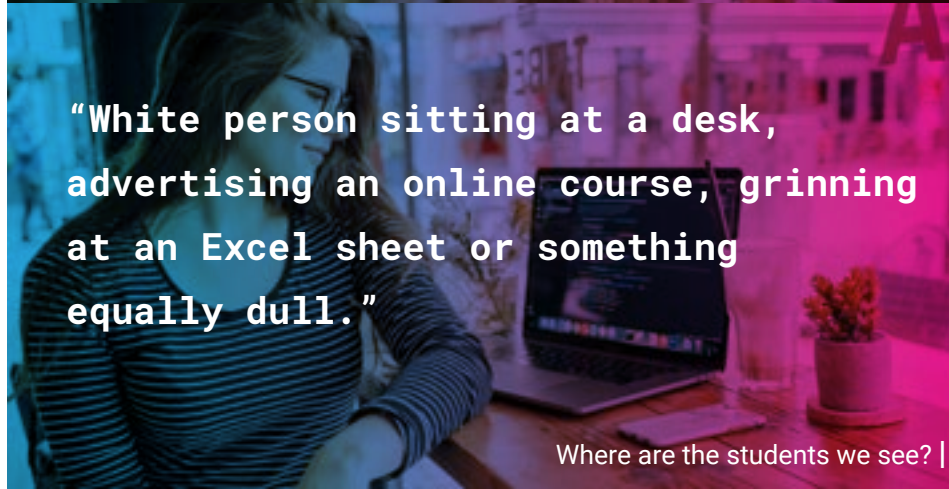
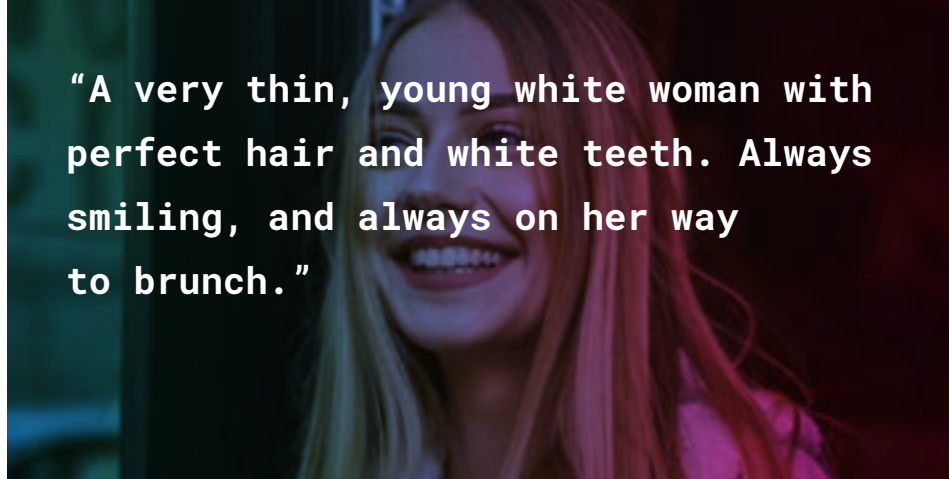
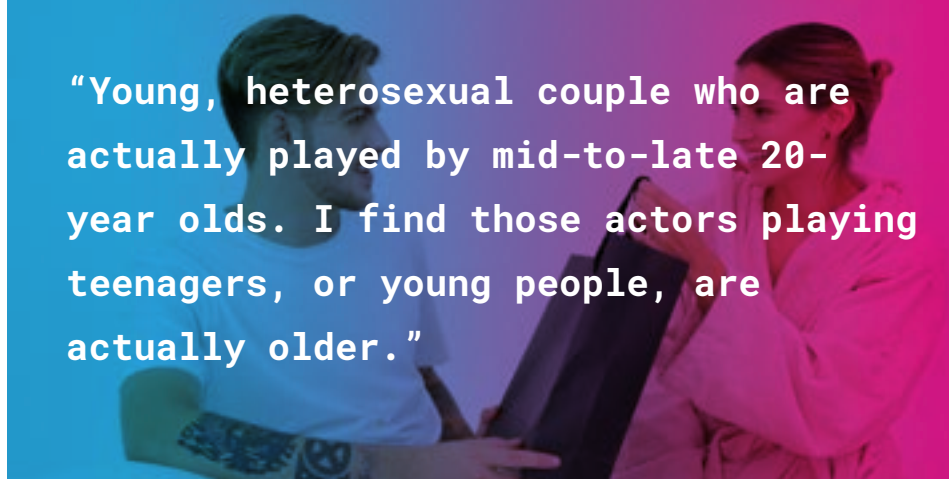
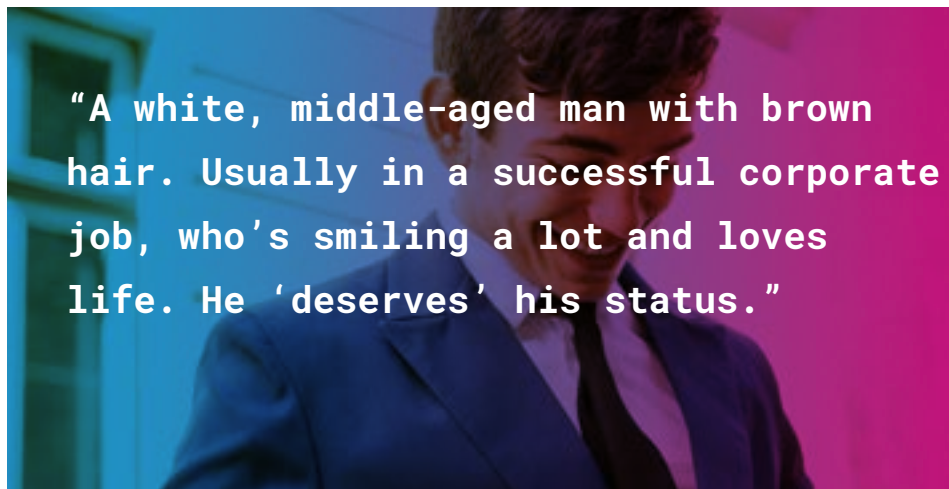
WHO ARE THEY SEEING?

We asked students, through free text, to tell us the typical person that they're used to seeing in adverts.

Below shows the most common words students used in their answers. We have recurring characteristics such as their body type (skinny, slim, thin) or their appearance (beautiful, attractive, 'perfect') and ethnicity (white).

Clearly, these images are not representative of our current society. Nor are they representative of the average student body. But it's not just the human aesthetics that students noticed.

They picked up on the fake, manufactured situations that the models were in, which weren't engaging them as an audience.

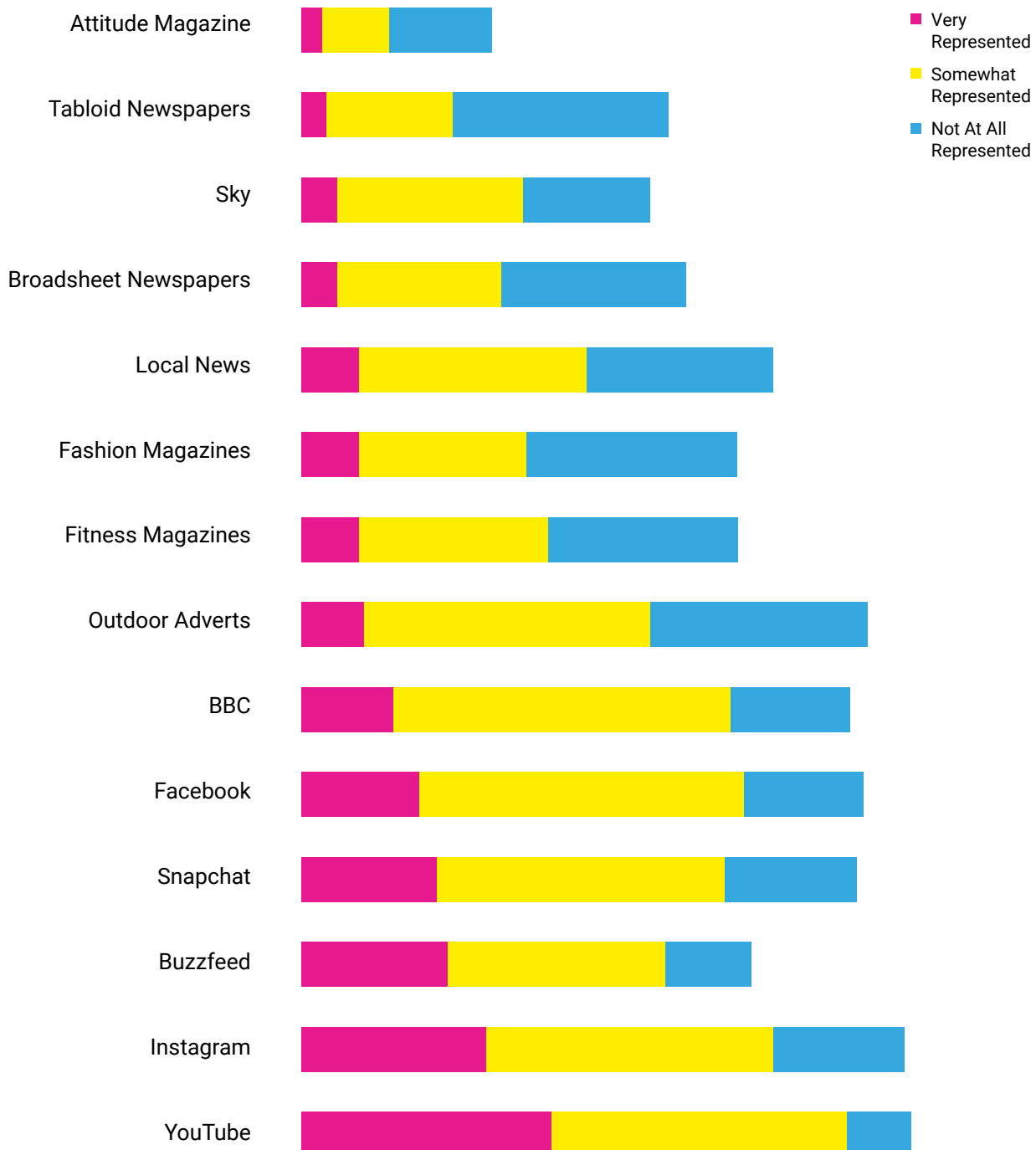


WHERE IS THE CUT -THROUGH?



IF STUDENTS AREN'T SEEING THEMSELVES...

Turning to social media, our study showed that 90% of students feel represented on YouTube – the most of all the social media channels. They also feel represented on platforms such as Instagram and BuzzFeed.



IF STUDENTS AREN'T SEEING THEMSELVES...

As the home of StudyTubers, influencers and ad content creators, YouTube gives everyone a platform. These personalities are considered very authentic, as the content is user-generated and 'real', especially compared to traditional media like fashion magazines, where less than half of students feel represented.

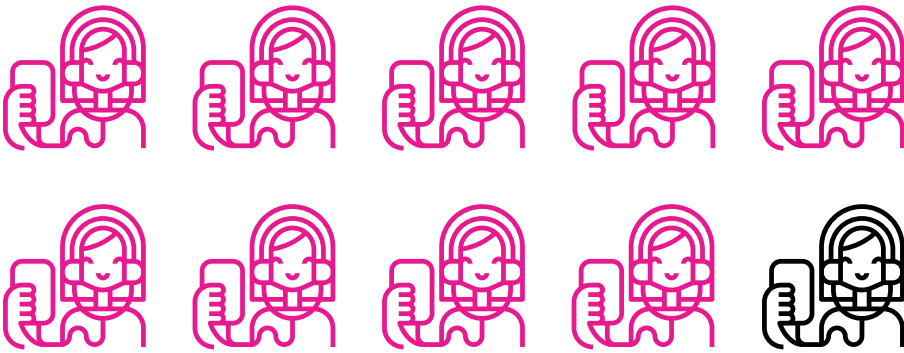
Continuing the theme of authenticity, we asked our respondents how much they agree with the following statements:

"I prefer brands not to use Photoshop in advertising."

"I want to see real people in advertising."



ALMOST 9 IN 10 STUDENTS PREFER BRANDS NOT TO USE PHOTOSHOP



So, the vast majority of students want to see images of real people that haven't been Photoshopped – the exact opposite of what they say they're currently seeing in advertising.

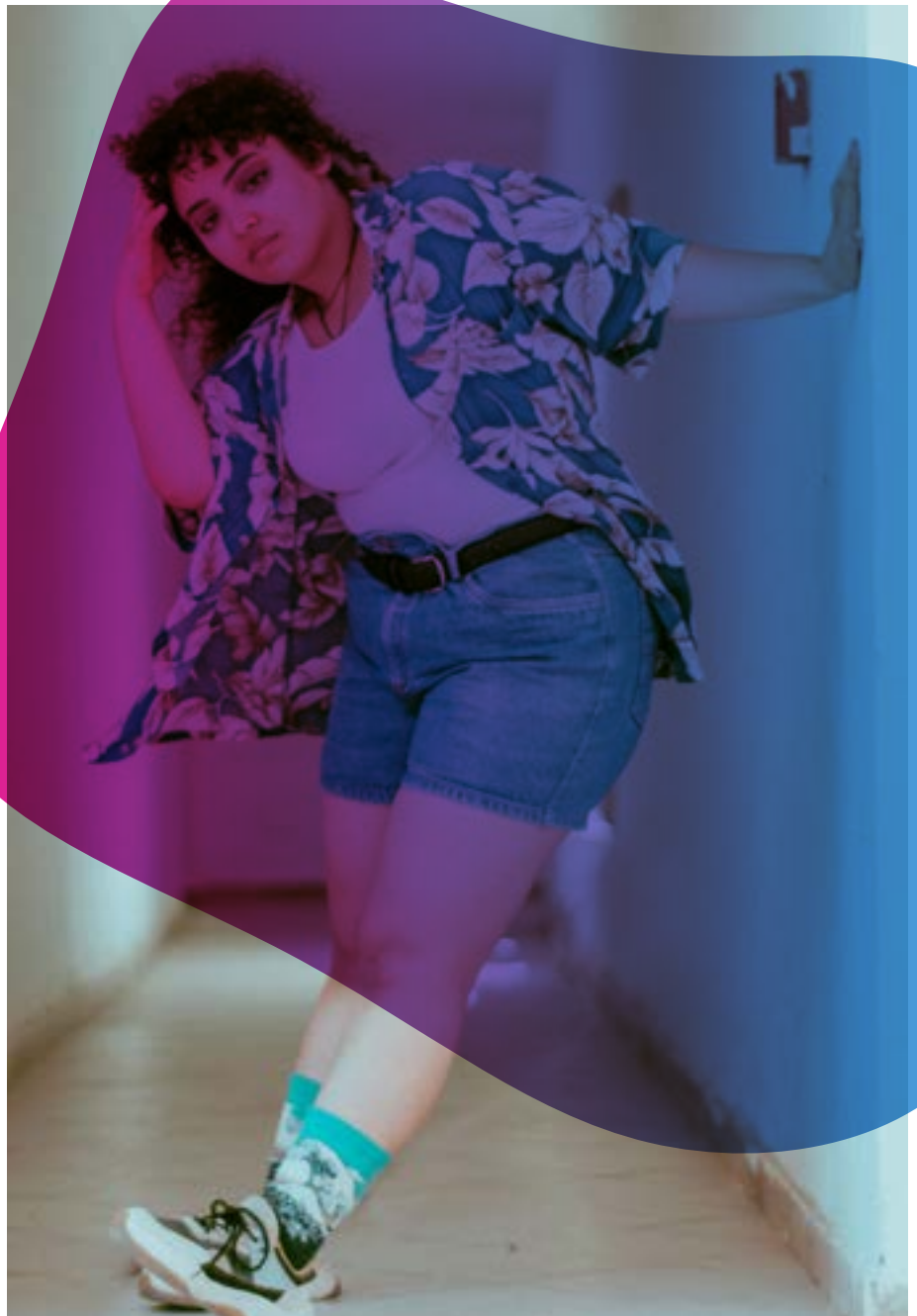
But what about brands and industries?



3 IN 4 STUDENTS WANT TO SEE REAL PEOPLE

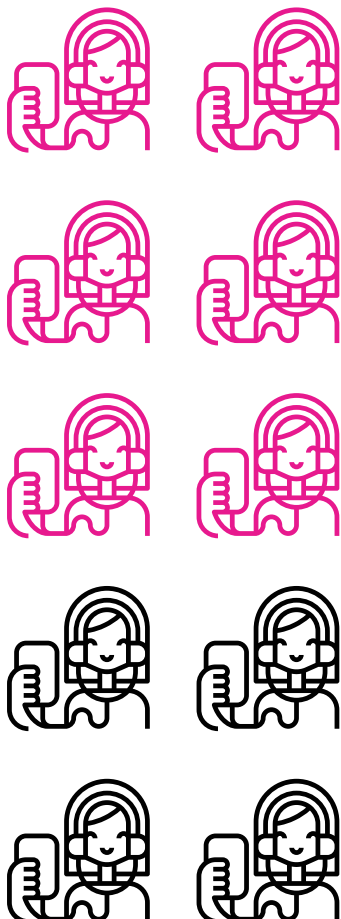


Now we know how students feel about representation in advertising, what images they're used to seeing in adverts, and which media channels they feel most attached to, it begs the question, which brands and industries do they see as the most inclusive?



IF STUDENTS AREN'T SEEING THEMSELVES...

6 IN 10 STUDENTS DON'T FEEL THAT UNIVERSITIES REPRESENT THEM



FOLLOW FASHION... JUST **OVER HALF** OF STUDENTS FEEL REPRESENTED BY FASHION BRANDS

As progressive institutions, that are amongst the most diverse and reflective of society, it's perhaps a surprising finding that representation isn't up to par. And it's certainly one that should be picked up on by all student specialist marketers and creatives working in the education sector. Clearly, more can be done.

Just over 50% of the students we surveyed said they feel most represented in fashion/clothing advertising.



“Clothing brands like New Look always offer student discounts and use similar aged models.”

“I remember ASOS and their use of ‘plus-sized’ models.”

“ASOS uses a wide range of models, but it could be better.”

“Pretty Little Thing have a very diverse range of models.”

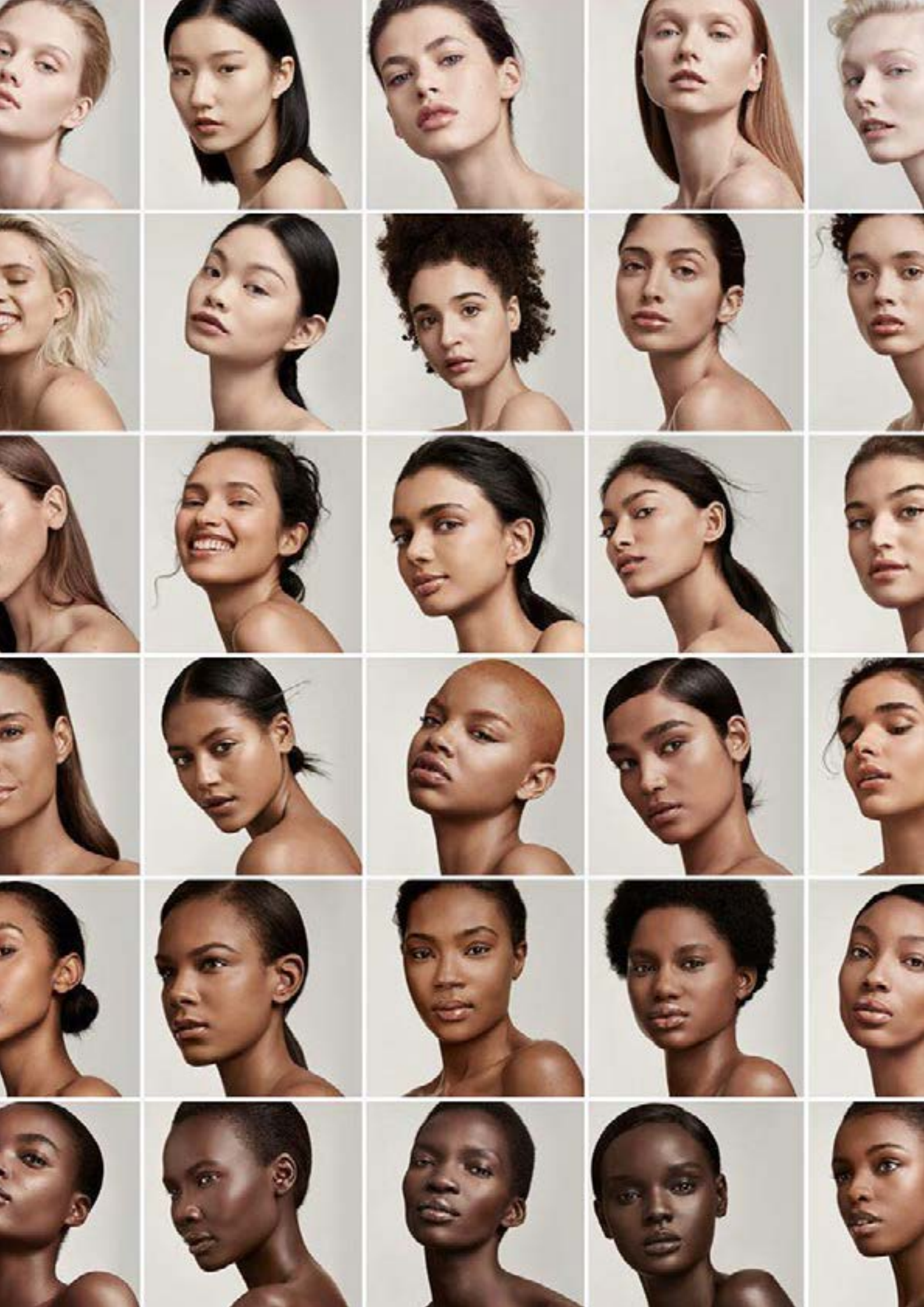
“ASOS, Topshop and other brands who have started to use a broader range of women of different sizes and colours for advertising and I think that goes a long way for their self-esteem and fighting dangerous beauty standards.”

“Levi’s use a broad range of ethnicities in their ads.”

“I feel that H&M represents me as their models are very diverse, and they have clothing that fits me well and looks nicer than other brands. They also have an amazing recycling scheme.”

WHICH BRANDS DO STUDENTS RECOGNISE?





RECOGNISABLE BRANDS

Here are the top 10 brands that our student audience felt were championing representation in their advertising.



The following campaigns were the top three that stood out:

Fenty Beauty: Beauty For All

The launch of Fenty Beauty highlighted the importance of inclusive marketing, which jolted the industry and shifted the beauty landscape.

The brand launched with a simple philosophy – ‘Beauty for All’ – which drove the marketing strategy for the brand. Fenty went live in 17 countries with an omnichannel marketing campaign that celebrated the different skin tones of their target customers and the 40

shades of foundation they offered, with a powerful hero image and **emotive video**.

The imagery used in this campaign was lauded for holding a mirror up to women, so they could find themselves in the brand and feel included.

The campaign resonated with women all over the world. Shortly after it was launched viral videos and selfies of women wearing Fenty poured

in. The first repost from the brand’s social accounts was of a woman wearing a hijab and applying Fenty. The subsequent traffic to the sales pages crashed their website.

In the first year of the campaign, Fenty Beauty was recognised for having the **‘Biggest beauty brand launch in YouTube history’** and was named as one of Time Magazine’s ‘Best Inventions’ of the year.



RECOGNISABLE BRANDS

Dove: Real Beauty

Dove's '**Campaign for Real Beauty**' is one of the most celebrated examples of brand purpose of all time. The campaign aimed to make women 'feel beautiful by broadening the definition of beauty'.

The campaign has been running since 2004. In that time, it has continuously stayed relevant, using real women in adverts that provoke thought and encourage educational initiatives for equality, alongside other forward-thinking initiatives like the early adoption of sustainability pledges.

More recently, the **#ShowUs campaign** saw Dove partner with Getty Images and Girl Gaze to ask women to help them create the world's most extensive photo library of real women and non-binary individuals to help shatter beauty stereotypes.

The campaign has been behind a 60% jump in sales over 10 years, and Dove bars became the number one soap brand in the US and Unilever's best-selling product group-wide.



EQUALITY.

[NIKE.COM/EQUALITY](https://www.nike.com/equality)

RECOGNISABLE BRANDS

Nike: Equality

Nike has a track record of making social statements – they've created some of the most memorable campaigns in the history of advertising. But it was their 'Equality' campaign that encouraged people to take the fairness of sport and apply that to their everyday lives, which really stood out for our respondents.

'Equality' launched in 2017 with a **short film** (Wieden + Kennedy) that featured Nike athletes LeBron James, Serena Williams, Kevin Durant, Megan Rapinoe and Dalilah Muhammad. It was narrated by Michael

B. Jordan, with music composed by Alicia Keys, and presented a stunning line up of diverse role models, who used their own reach and market value to uplift the campaign message – sport brings positive values to everyday life.

The campaign was supported by a huge omnichannel campaign that included a campaign-specific website, social media and OOH placements. As well as CSR initiatives such as a \$5 million donation to organisations that advanced equality in the US.

RECOGNISABLE BRANDS

How does diversity in advertising make students feel?

Often us marketers can be guilty of talking about audiences just in terms of targeting criteria, like age and gender, when trying to reach out to prospective customers. We sometimes forget about who these people are and the emotional impact that our creative might have on them.

So, we wanted to know how students felt when they see people that look like them in ads. Unsurprisingly, students feel overwhelmingly positive about this.

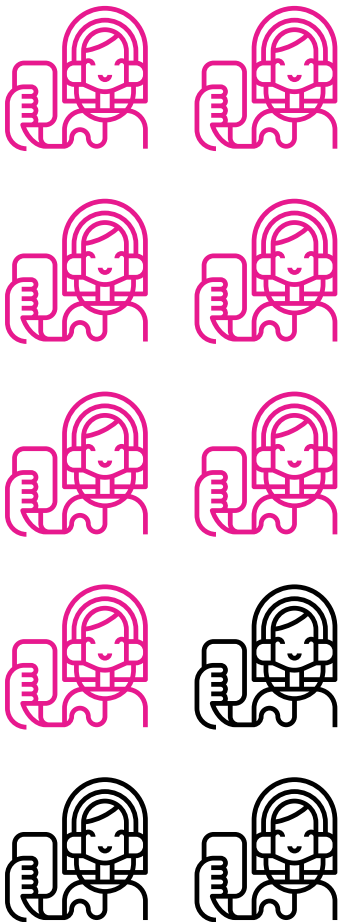


The three strongest emotions felt by our respondents were 'included', 'motivated' and 'inspired'. When you're building any campaign, these are the kind of emotions you want your audience to feel, so diversity is very

important. But this isn't just on an emotional level – as strategic marketers, it's also crucial that you consider the bottom line. What impact does creative diversity have on your brand value and ROI? Well, seven out of ten

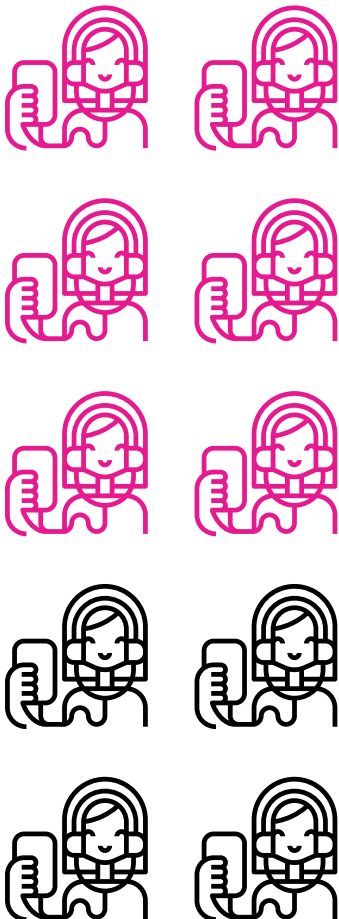
students stated that they were more likely to buy from brands that they felt represented them, and six out of ten students think that brands are more successful when they show diversity in their advertising.

7 IN 10 STUDENTS ARE **MORE LIKELY** TO BUY FROM BRANDS THAT REPRESENT THEM

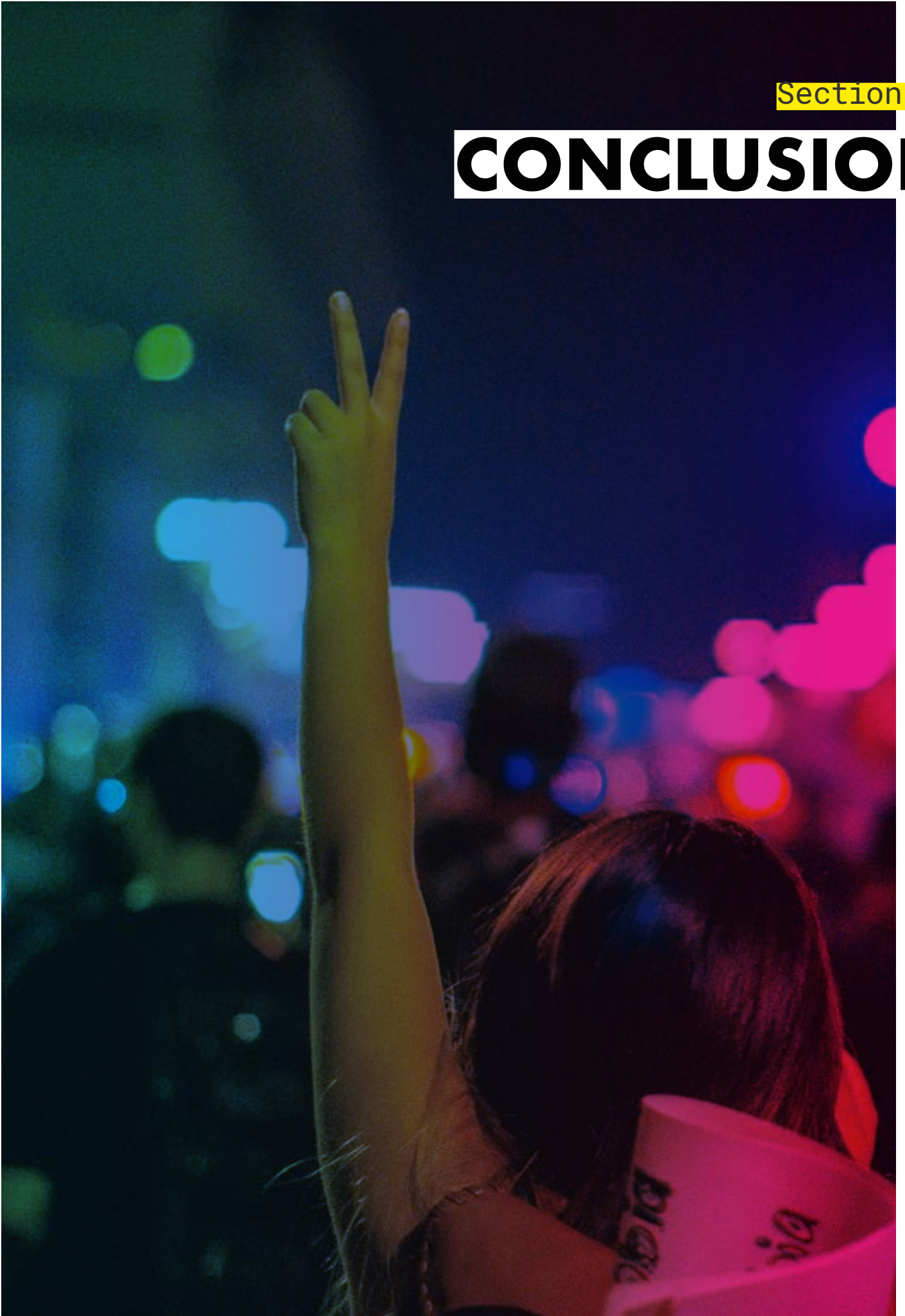


This shows a direct link between how students feel about your brand, and how they might act and engage with your brand if you increase diversity in your creative.

**6 IN 10 STUDENTS
THINK THAT
BRANDS ARE
MORE SUCCESSFUL
IF THEY HAVE
DIVERSITY IN
THEIR ADVERTISING**



CONCLUSION



CONCLUSION

Students are feeling more stressed and anxious than ever before. And everyone working in student marketing and recruitment wants to do everything we can to support students going through the big and small changes in life. It's within our power to make students feel included and part of something. So, it's essential that we understand our responsibility, as well as looking to create successful campaigns.

Campaigns promoting diversity leave the student audience feeling motivated. Which is not just a positive emotion, but one with action behind it. A student who feels motivated having seen your advert is going to engage with your brand further and take the steps you want them to take.

Brands that include diversity in their campaigns are more likely to be successful, and students are more likely to buy from them. This is certainly the case when we look a little deeper at some of the most successful brands in the world.

To name just a few, Nike has increased its market value by 600% since 2006 and is now worth a staggering \$146 billion. Another example would be Apple, whose value has increased by 1900% since 2006. And Dr Martens has seen its Group revenue increase by 20% since the start of 2018. There are lots of factors at play here, but these hugely successful brands all have two things in common: they embrace diversity in their advertising, and students remember their campaigns.

CONCLUSION

Our final point relates to our last survey question. We asked what students were doing to challenge how they were represented in advertising. In response, 97% of the students we asked said that they were not actively doing anything to challenge the status quo. Which means that we, as marketers, advertisers and creatives, really need to step up and embrace diversity. Because if we don't, we won't connect and engage with our target audience. But there's more to it than that – embracing diversity is us as marketers doing our bit to improve representation in advertising and into further society.



GET ACCESS TO THE LARGEST COMMUNITY OF STUDENTS

How is your brand perceived by the student audience? In a competitive market, you need to do all you can to get a better understanding of students.

This level of market intelligence is a great asset to have on your side; this is where our opinion panel comes in.

Student Hut's Opinion Panel is the country's largest community of engaged students - who are actively signed up to take part in market research.

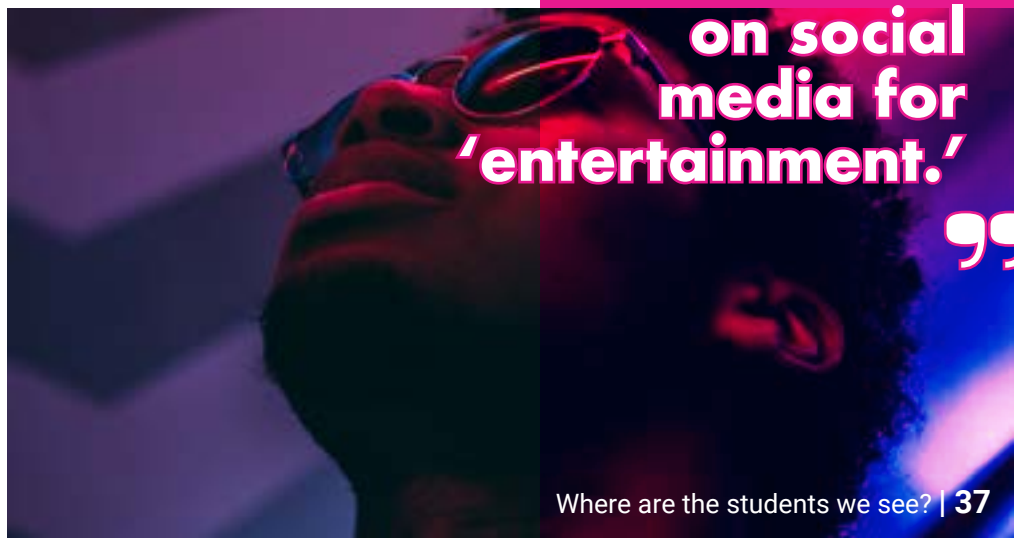
You can use the panel to collect data from actual students and then use this research to learn how students are engaging with your brand to better inform your marketing strategy.

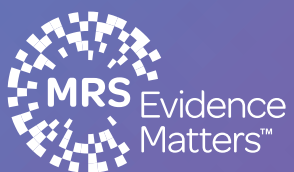
By using the Student Hut Opinion Panel, you can:

- + Gain unique marketing intelligence in what's making the student market tick
- + Learn how youth markets are interacting with your brand
- + Gain intelligence to improve your marketing campaigns and maximise results



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





STUDENT HUT

www.studenthut.com

“The TripAdvisor
for universities”

