

# Social media analysis of the UK's prospective international students.

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## Executive summary

July 2022

# Project Background

This research will provide the British Council with a comprehensive analysis of the social media interaction and output of the UK's prospective international students from selected countries. The research includes main components:





## Project Scope

**Markets:**

China, India, Italy, Malaysia, Nigeria and United Arab Emirates (UAE).

**Languages:**

English\*, Chinese (Mandarin), Hindi, Bengali, Punjabi, Italian, Malay, Arabic

**Audience:**

Young people (under-35s)\*\*

**Time period:**

Social media listening and student profiles - 12 months (April 2021 to March 2022)

Search analysis - 5 years (April 2017 to Feb 2022)

Website traffic analysis – 1 month (February 2022) *due to platform data limitations*

\*We have previously conducted extensive research into language use on Nigerian social media, and found that more than 95% of posts use English or Nigerian Pidgin English, with the remaining content scattered across a few indigenous and international languages.

\*\* All student profile estimation is drawn from a sample of under 35s on Twitter (non-China countries) and Weibo (China). We took this approach as there were insufficient samples of prospective students to run valid segmentations in each market.

## Methodology: 1. Social media listening

Social media listening helps us to size the conversation around UK study and the leading themes in this discussion.



- Build Boolean queries constructed from key search words and phrases indicating relevant conversations. Search terms include the names of UK institutions and locations, as well as thematic keywords.
- Interpret queries from English into local languages.
- Harvest relevant social media posts from Twitter, Reddit and YouTube, and filter to first-person conversation only.
- Apply age filters (1 group, of people aged under 35).

- Use keyword strings to categorise the conversation into specific categories/topics and show their prevalence.
- Create new topic filters based on a qualitative review of social media conversation, to quantify new topics.
- Generate a report indicating the leading themes in UK study-focused conversation in each country, and how they compare in terms of prominence. Share top level insights on conversation drivers.
- N.B. While we can provide Twitter-based data on source country, gender and age range, we cannot access quant data on study level and course duration.

# Notes on social media listening

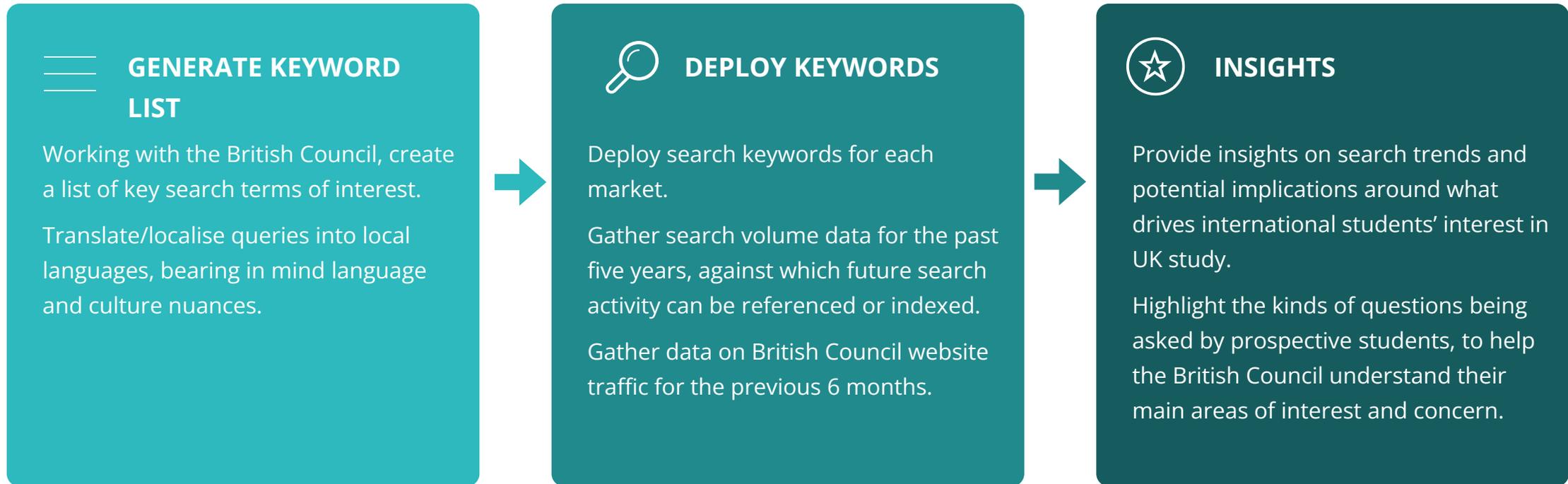
**GOAL: TO SIZE AND UNDERSTAND THE SOCIAL MEDIA CONVERSATION AROUND UK STUDY COMING FROM PROSPECTIVE INTERNATIONAL STUDENTS BASED IN EACH TARGET MARKET.**

- **Platforms (Non-China).** We reviewed data from Twitter, forums and YouTube for this research. While we would ideally also have been able to include Instagram, Facebook and TikTok content, these platforms have tight limits on the data that can be legally accessed by third parties. These two platforms, in particular, do not allow for any automated tracking of non-public (business or creator) accounts. While individuals' posts can be reviewed manually, this is an extremely time-consuming (and therefore expensive) process. The platforms (Facebook and Instagram) also do not provide any user data, such as where they are based, their age, who they follow etc.
- These restrictions apply to all law-abiding social listening platforms and research agencies, meaning that the data is just not accessible for projects such as this one.
- **Platforms (China).** We reviewed data from Little Red Book, Weibo, Q&A platforms, blogs and forums.
- **Languages.** We conducted research in the following languages:
  - China: Mandarin
  - India: English, Hindi, Bengali, Punjabi
  - Italy: English, Italian
  - Malaysia: English, Malay
  - Nigeria: English (this is the language used in most of the Nigerian content on the platforms we explored)
  - UAE: English, Arabic
- **Age (Non-China).** Users aged under 35.
- **Age (China).** Users aged under 35 (Weibo); all users (other platforms).
- **Data collection.** For all countries, we constructed a series of complex keyword searches to identify posts from those considering studying in the UK. Our advanced social listening tool then reviewed all posts from the relevant platforms over the previous 12 months, pulling in the content that met the keyword- and age-based criteria, for our review.

Note: A 7-month Twitter ban in Nigeria will have impacted results for this country. During the ban, we did see some data come through, due to the imprecise nature of geo-location, which draws data from several sources, including self-provided information (people tagging in their account that they are based in Nigeria).

## Methodology: 2. Search & website traffic analysis

We used search data to benchmark students' interest in studying in the UK, over time and compared to competitor countries.



# Notes on search & website traffic analysis

**GOALS: (1) TO GAIN A VIEW OF THE INFORMATIONAL NEEDS THAT DRIVE WEB SEARCH DATA IN EACH COUNTRY BY THOSE CONSIDERING UK STUDY; (2) TO UNDERSTAND WHICH WEB SEARCHES DRIVE THE MOST TRAFFIC FROM EACH COUNTRY TO THE STUDY UK WEBSITE.**

- **Platforms (Non-China).** Google search.
- **Platforms (China).** Baidu search.
- **Website.** <https://study-uk.britishcouncil.org/>
- **Age.** No age filter applied.
- **Languages.** We conducted research in the following languages:
  - China: Mandarin
  - India: English, Hindi, Bengali, Punjabi
  - Italy: English, Italian
  - Malaysia: English, Malay
  - Nigeria: English (this is the language used in most of the Nigerian content on the platforms we explored)
  - UAE: English, Arabic
- **Search Data.** This data shows the topics searched for in connection with UK study.
- **Website Traffic Data.** This data shows the topics searched for which are most likely to lead people to click through to the Study UK website.

Note: Website traffic data not available for China

## Methodology: 3. Student profile estimation

Student profile estimation helps us to identify the preferred social media platforms, influencers and discussion topics for those aged 13-34, among other behaviours and preferences. This will help us to better understand how to target prospective international students online.



### DISCOVER Generate Samples

- For each market, build an audience of Twitter/Weibo users aged 13-34.
- Using machine learning, the platform infers the age of the users based on information in the profiles of the users, their online interactions, how they write, content they share, affinities and other public information.
- Users will be clustered into segments based on their online affinities – the types of accounts they tend to follow.
- For Weibo, they will be segmented based on 'tags' they select indicating their interests.



### PROFILE Bring to Life

- For each group, analyse and contrast commonalities in:
  - Social media platform preferences,
  - Preferred media and websites
  - Online behaviour,
  - Interests,
  - Who influences them, and
  - Personality type.
- Provide a descriptive overview of the main subgroups in each country and a detailed view of the behaviours and preferences of the group as a whole.



## Notes on student profile estimation

### GOAL: TO PROFILE PROSPECTIVE INTERNATIONAL STUDENTS FROM EACH COUNTRY.

- **Platforms (Non-China).** Twitter. The platform we use for Non-China audience segmentation limits its data collection to Twitter profiles as this platform offers the most consistent, legal, access to its users' social media posts and metadata. It is not legally possible to collect the depth and breadth of information from platforms such as Instagram and Facebook. These two platforms, in particular, do not allow for any automated tracking of non-public (business or creator) accounts. While individuals' posts can be reviewed manually, this is an extremely time-consuming (and therefore expensive) process. The platforms (Facebook and Instagram) also do not provide any user data, such as where they are based, their age, who they follow etc.
- **Platforms (China).** Weibo. Weibo offers to greatest access to user data and metadata.
- **Languages.** NA.
- **Age.** Users aged under 35.
- **Approach (Non-China).** The tool that we use to profile the audiences collects all data based on the criteria outlined above. Demographic information is collected from the user's Twitter metadata using algorithm-based interpretation of online activity. Affinity information (e.g. media/social media preferences, interests, accounts that influence them) is calculated using a complex algorithm which considers things like the platforms they share content from, the links they like or comment on, the accounts they link to in their bios, etc. Affinity is used to profile audiences by identifying the platforms, news sites etc. that they show a preference for, that differentiates them from the country's wider population. While we would have liked to include the media with the highest circulation, social media platforms with the highest penetration and most followed influencers, as points of comparison, this data is not available through the social-media-based tools that we use.
- **Approach (China).** Demographic data is pulled from Weibo user metadata. Media and social preferences are based on the volume of links shared, and influencers are those who are most followed. Interests are drawn from those indicated by the user when they create their Weibo account.

# Summary of audiences analysed

Different audience breakdowns were applied for the different stages of the research:

## **1. Social media listening**

All analysis undertaken as part of the social listening component is focussed on social media users under the age of 35, who mentioned UK study. Platforms explored include all legally available social media platforms such as Twitter, Forums and YouTube.

## **2. Search & website traffic analysis**

Everyone in the market. The targeted nature of this data (people from the given countries who conduct web-based searches for information on UK study) eliminated the need for audience selection.

## **3. Student profile estimation**

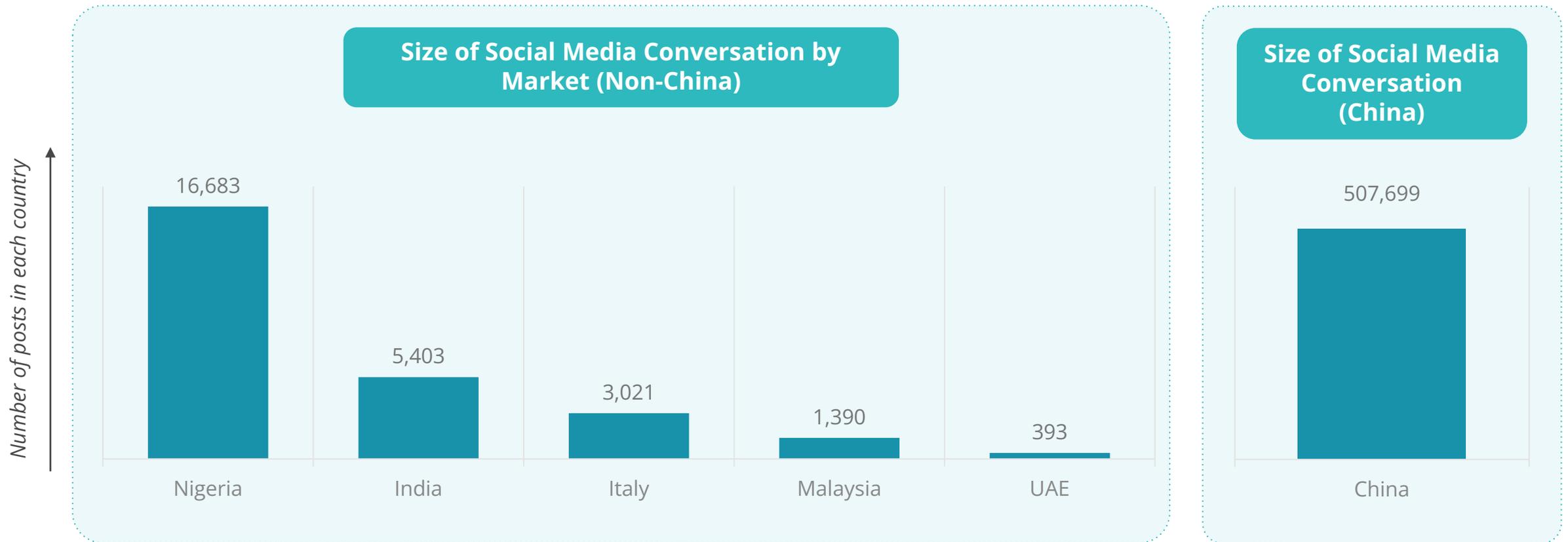
Twitter users in each market aged 13-34. The tool that we use for AI and algorithm-based audience segmentation depends on Twitter, as this platform offers the most consistent, legal, access to its users' social media posts and metadata.

# **Executive Summary**



# 1. Social media listening.

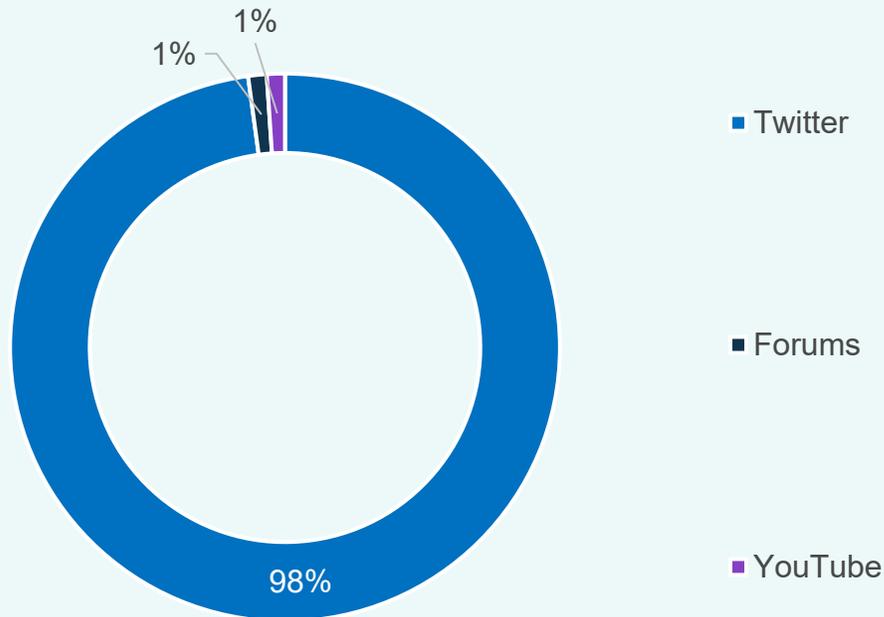
- Chinese students generate the highest volume of social media posts around UK education over the 12 month period analysed.
- Despite having a similar population size, the we see lower overall volumes of conversation about this topic in India.



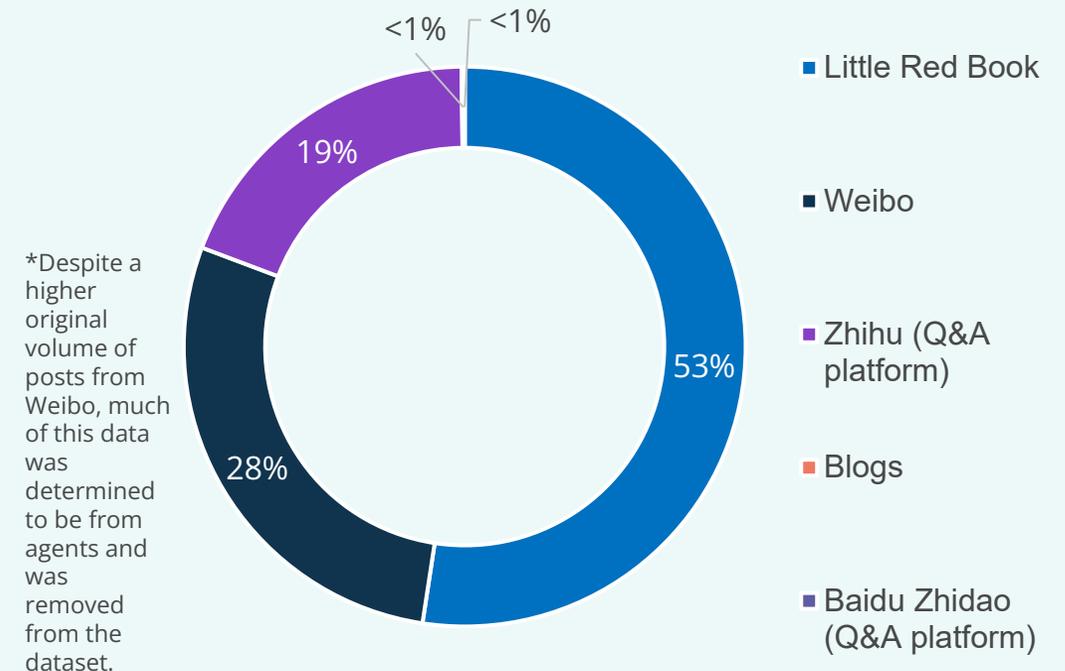
# Most non-China content is posted on Twitter, and in China the leading platform is Little Red Book

Despite hosting a far smaller share of content, the posts featured on forums tend to be more detailed and insightful. Posts shared on Twitter are more likely to be passing mentions of UK study, or resharing viral or semi-viral posts from other young social media users.

## SOCIAL MEDIA PLATFORM SHARE OF VOICE (non-China)



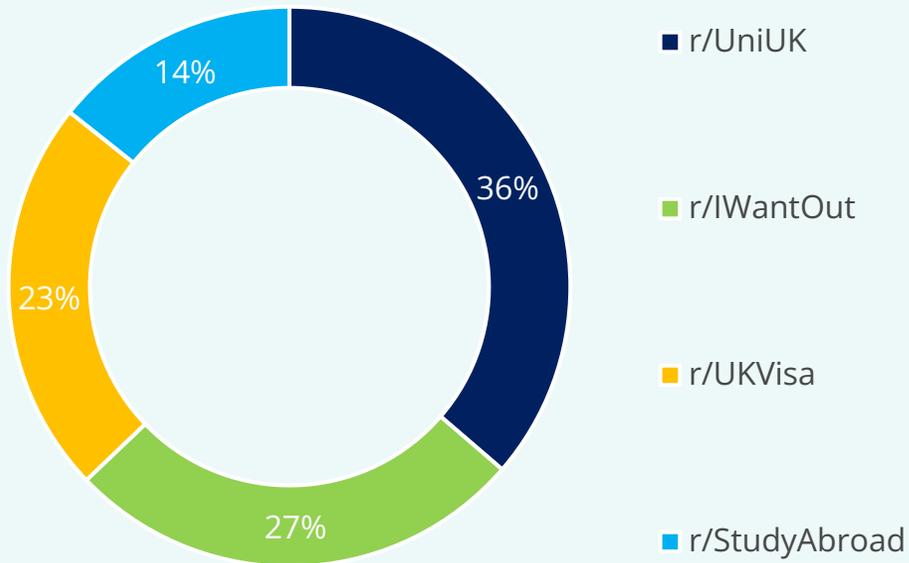
## SOCIAL MEDIA PLATFORM SHARE OF VOICE\* (China)



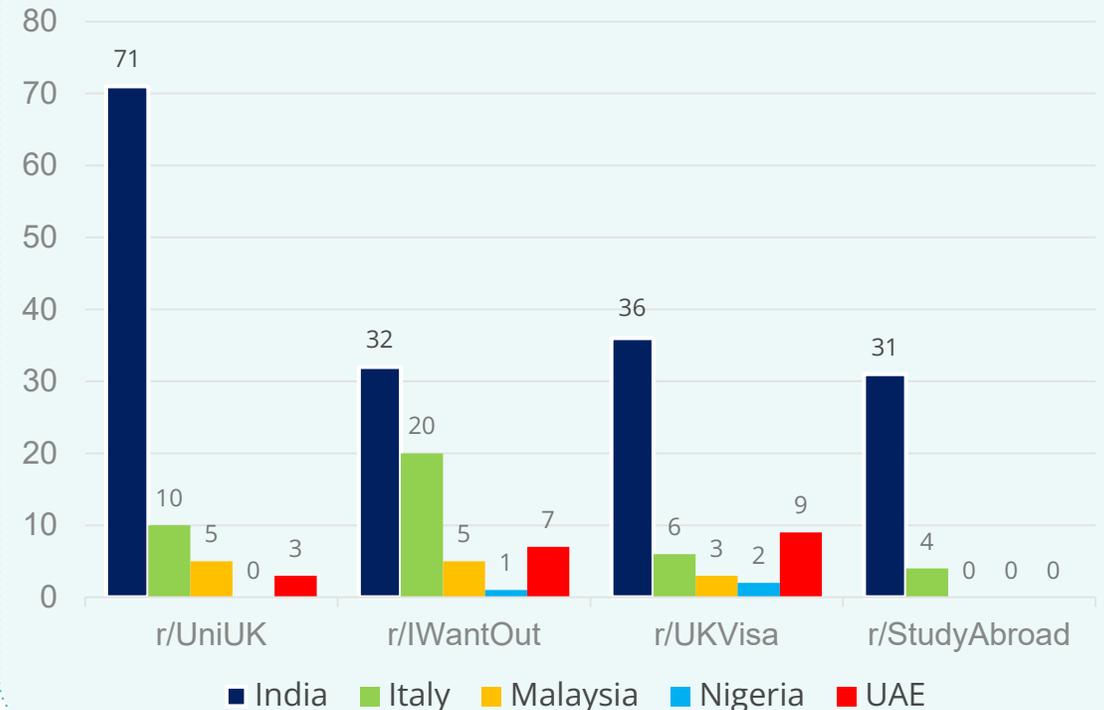
# There are four leading subreddits that are used by self-identified prospective students seeking information and support

This slide focuses on the subreddits on the Reddit platform, identified through manual searches as carrying relevant content.

### SUBREDDIT SHARE OF VOICE (Excl. China)



### SUBREDDIT POST VOLUME BY COUNTRY



# Affordability and potential subject areas for study are significant drivers of conversation in almost every market

While in China affordability generates relatively low share of voice, students express strong feelings and opinions on the subject.

Share of Conversation Topics by Market



■ Affordability ■ Subject areas ■ Culture ■ Covid-19 ■ Visa ■ Post-graduate work opportunities ■ Remote learning ■ Accommodation

Platforms analysed: China: Weibo, Little Red Book, Zhihu, Blogs (Zhihu Blog and Sina Blog), Baidu. Non China markets: Twitter, YouTube and Reddit All users aged <35.

# Affordability is a significant barrier to UK study for prospective students



## SOCIAL LISTENING

- Prospective students express concern about the cost of tuition fees, visas and the cost of living.
- Students from all countries seek and share information on scholarships, which to many dictate where they will be able to study. Students discuss having to turn down offers when they are unable to access financial support, and sometimes turn to social media to crowdfund their tuition and travel expenses.
- While the UK is generally compared favourably with the US when it comes to the cost of education, in Italy people are beginning to discuss the costs as comparable.
- London is seen as especially expensive.
- Heavy coverage of the UK's cost of living crisis may be adding to concerns about the expense associated with life in the UK.



## SEARCH ANALYSIS

- Search data has a strong focus on scholarships, with students trying to find out what funding they are eligible for.
- Commonwealth scholarships – and the Chevening in particular – drive questions and traffic to the Study UK website.



“

*Unless you're ready to dish out 40k per year on tuition alone, I would advise you to look elsewhere for studying. Brexit sadly closed the door on a UK uni education for many EU students.*

*Is it really expensive to study in the UK? I expect to go abroad in June next year, with preparatory courses and undergraduate courses, and maybe a master's degree. Considering the cost, I won't consider the London area. How much is it expected to cost in a year? How much can I get for working? Is it easy to get employed?*

”

# Students from China and Nigeria hope to mitigate the costs of studying in the UK by working while they continue their education



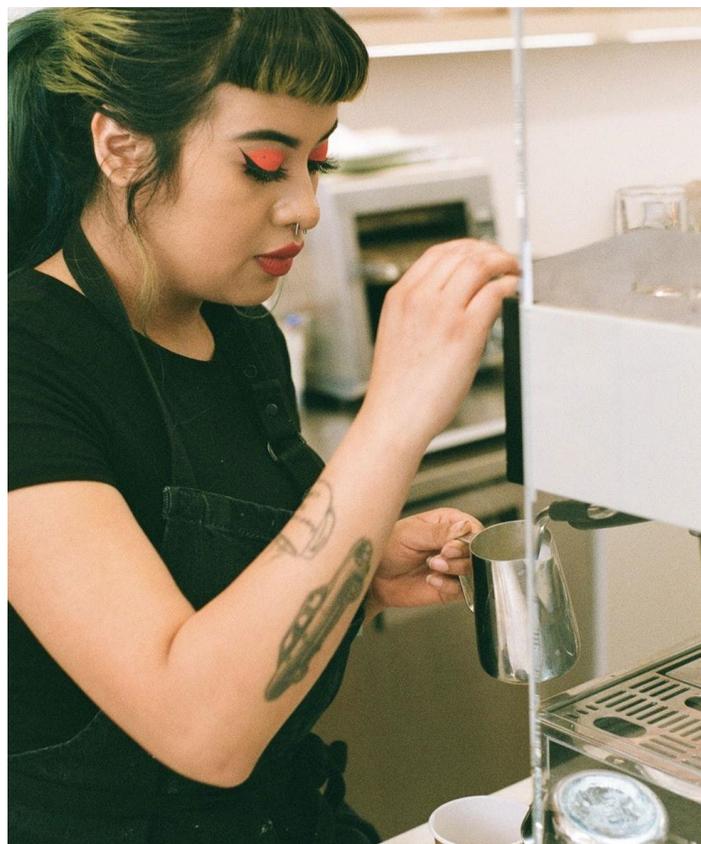
## SOCIAL LISTENING

- Chinese students who have studied or are studying in the UK advise prospective students not to try to balance work and study, for fear of negatively impacting their grades.
- Students from other countries use search platforms to try to understand whether they can access a visa which would allow them to legally work and study in the UK.



## SEARCH ANALYSIS

- Key questions from Nigerian students:
  - *Can I work and study in UK*
  - *Can you work while studying in UK*
  - *How can somebody work and study in UK*



“

*About working: unless you have strong learning ability, you don't have time to work if you want to get good grades (such as distinctions or higher)*

”

# Potential exposure to UK culture fuels both concern and excitement for prospective international students



## SOCIAL LISTENING

- Language proficiency is seen as a significant barrier for students from India considering UK study. There is also some discussion of the potential for culture shock, with some advising that those considering a move join online communities targeted at helping them understand the cultural differences they may encounter.
- Prospective students from Italy discuss the UK as a multicultural hub offering significant opportunities for personal and professional growth. They are excited by the prospect of forming friendships with people from all over the world, however are put off by the perception that in the UK's major cities everyone is always busy and in a rush. The rhythm of living in big UK cities contradicts with the Italian concept of 'dolce far niente' (translated as 'pleasant relaxation in carefree idleness').
- Students from China are keen to experience the museums, galleries and music that are so easily accessible in the UK, but they worry about experiencing culture shock in a more interactive classroom setting.



“

*This evening's class is the most embarrassing class so far. I joined the embarrassing discussion and tried my best to make myself look outgoing and easy-going. I'm actually very nervous. They don't understand the topic I said, and I don't understand what they said... It's a wonderful collision of cultures.*

”



## SEARCH ANALYSIS

- People from all countries drive website traffic for the Student UK site by asking questions about the UK weather, language and religions practiced.

# The prospect of being able to remain in the UK after studies are complete is a key driver of interest in UK study



## SOCIAL LISTENING

- The UK's introduction of a post-study work visa for international students is seen as a positive by prospective students from India. For many Indian students, the reason for studying in the UK is to be able to work there afterwards. In many cases they would need the higher UK earning potential in order to recover their investment in their studies.
- Prospective students from Malaysia discuss the limited opportunities for them to gain employment in the UK after studying. While having studied at a recognised UK institution is expected to bolster one's CV, students feel that due to Malaysia's fluctuating economy even this would not be enough to guarantee employment in their home country.
- Hopeful Finance and Economics students from Italy discuss the potential that a UK education could give them access to higher earning potential in London or on Wall Street.
- Some students worry about whether they will be able to get post-graduate work that justifies their investment in their education.
- In general, the UK is compared favourably to the US in terms of potential for postgraduate work in-country.



“

*My only concern is getting a job after I finish my studies, I'm an average student thus I'm not aiming at tier 1 colleges.*

”



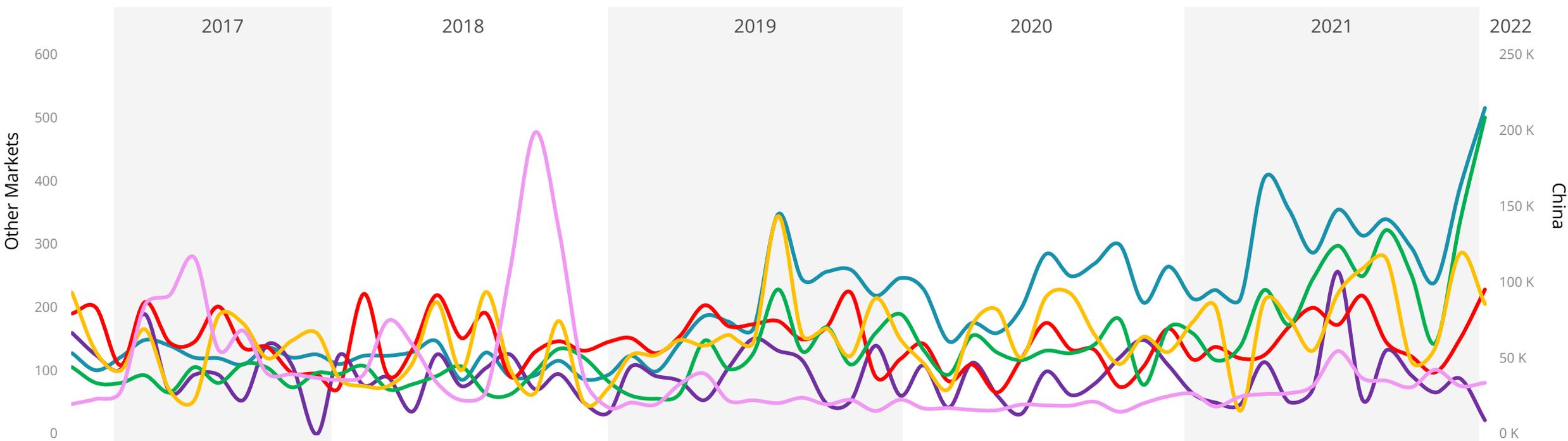
## SEARCH ANALYSIS

- People seek information on the processes and types of visa that would enable them to stay in the UK. For some, the goal is to access permanent residency status.

## 2. Search trend analysis.

The five-year trend in search activity is stable or trending upwards for all markets except Italy, where interest appears to have been gradually waning since Brexit.

Monthly searches for 'Study in UK' over the past 5 years\*

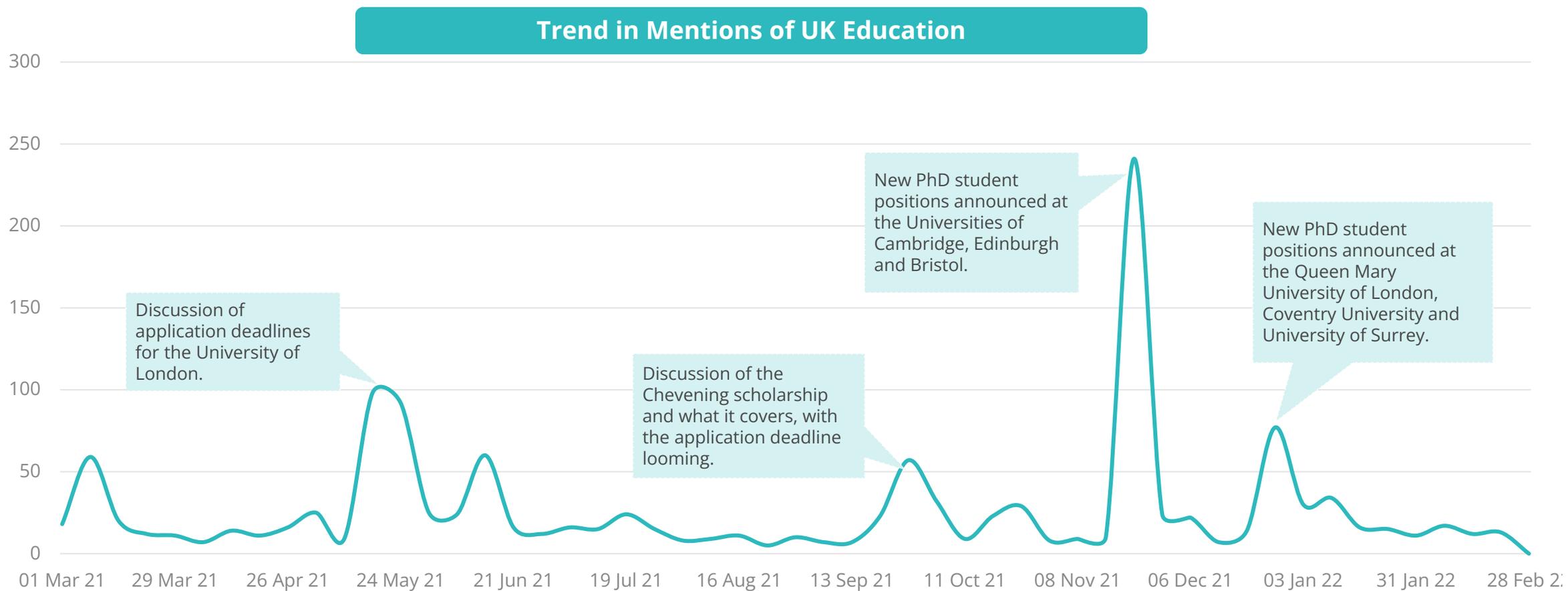


\* Chinese data is presented on a separate scale, indicated on the right.

Search Data: Google (Non-China). Baidu (China).

India Italy Malaysia Nigeria UAE China

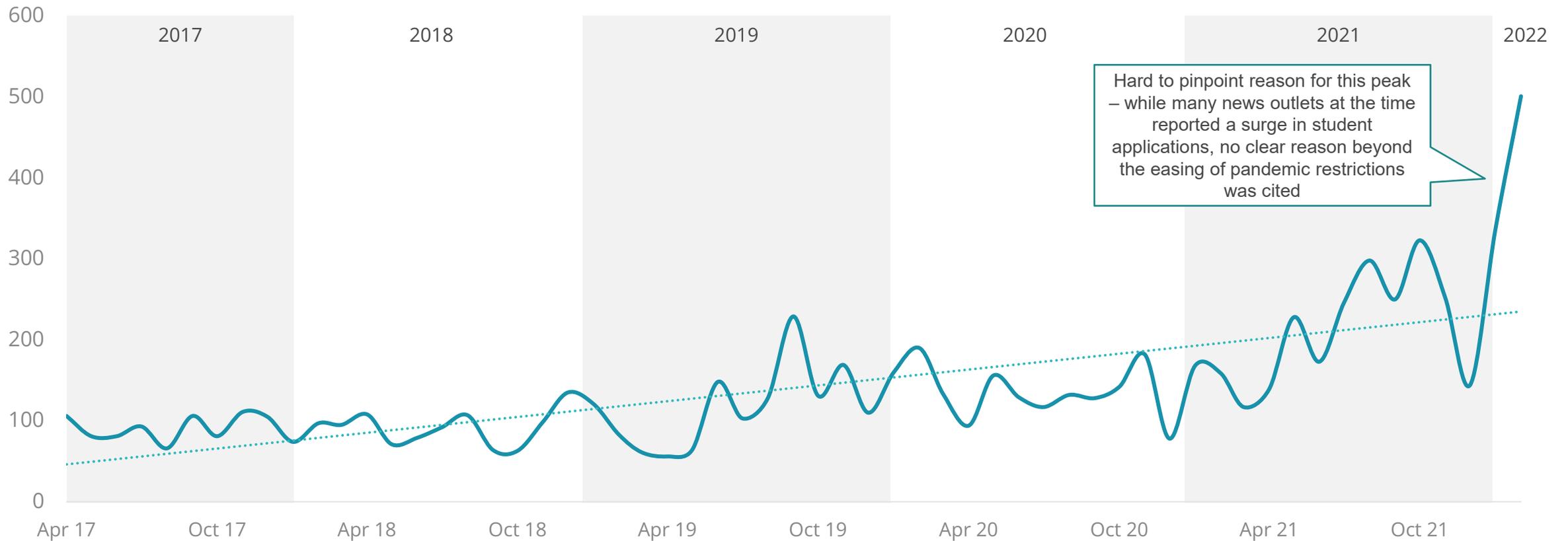
# Peaks in conversation from Malaysian students are driven by people sharing news of newly available PhD positions at several universities



## Search trend analysis for Nigeria

Searches have increased gradually over the past five years, with a sudden increase at the start of 2022.

### Monthly searches for 'Study in UK' over the past 5 years



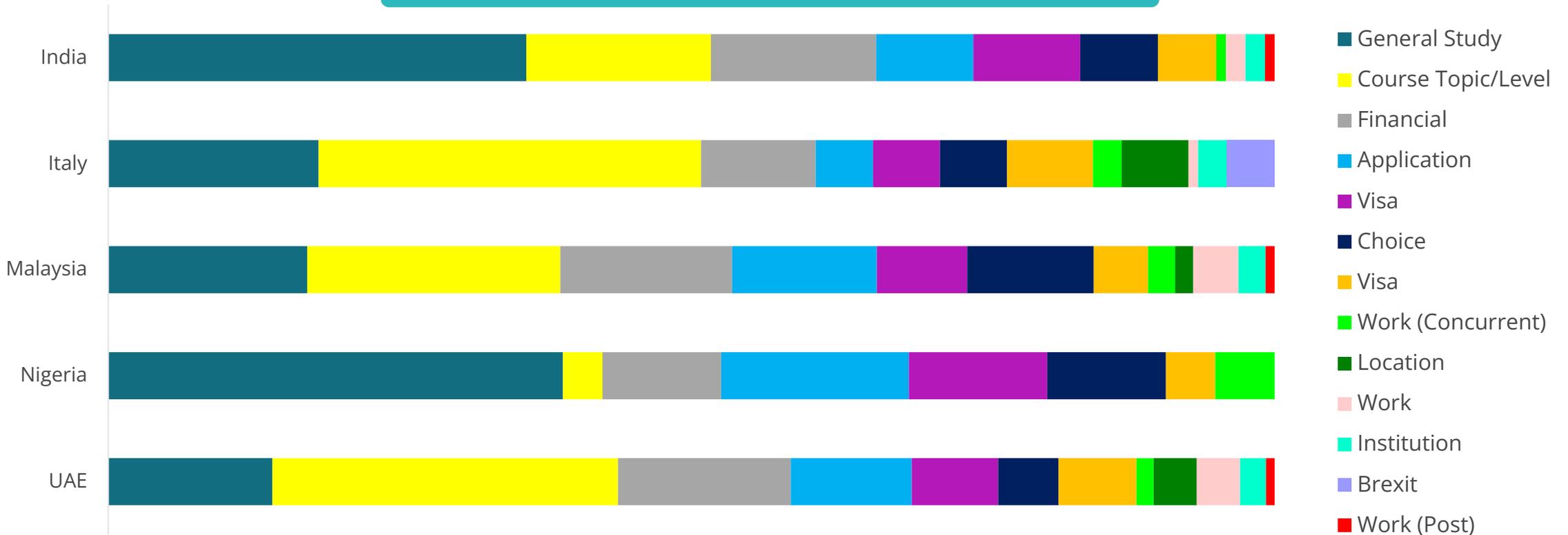
## Keyword searches around UK study, and those leading traffic to the Study UK website can be categorised into a few key topics

Topic	Topic Description
<b>Application</b>	Searches for information around how to make an application. For example, the search question 'why do you want to study in the UK answer' is likely to be searched for by prospective students trying to write their application/personal statement.
<b>Boarding School</b>	Searches for information on UK boarding schools – this is split out as a separate topic driving website traffic, as it seems to be a discrete topic separate from searches around higher education.
<b>Brexit</b>	Searches around the impact of Brexit for international students hoping to study in the UK.
<b>Choice</b>	Searches for general information on how to choose where (country or institution) or what to study.
<b>Covid-19</b>	Searches related to the impact of Covid-19 on UK study.
<b>Course Topic/Level</b>	Searches which ask questions around study at a particular level (e.g. undergraduate or postgraduate), or of a particular subject (e.g. medicine).
<b>Culture/Environment</b>	Search questions which try to understand UK culture (such as the languages spoken and religions followed) and environment (e.g. what the weather will be like).
<b>Events</b>	Searches for specific study-related events (British Council Study UK Fair).
<b>Financial</b>	Anything related to financial matters (e.g., scholarship, student funds, cost of living, etc.)
<b>General</b>	General searches for study in the UK (e.g., 'UK study', 'education in UK').
<b>Institution</b>	Anything related to institution/university to study (e.g., 'where/which university can I study biotech in the UK', 'top ranked UK universities') or mentioning a specific university.
<b>Visa</b>	Anything related to visas (e.g., 'student visa', 'visa process', 'how to stay after completing study', etc.).
<b>Work</b>	Searches related to working potential, both while studying and after completion of studies.

# Questions around specific subjects and study levels (e.g. undergraduate) drive general search data

General Study refers to students inserting generic search queries such as 'UK study'.

Share of 'Study in UK' Search Topics by Market\*



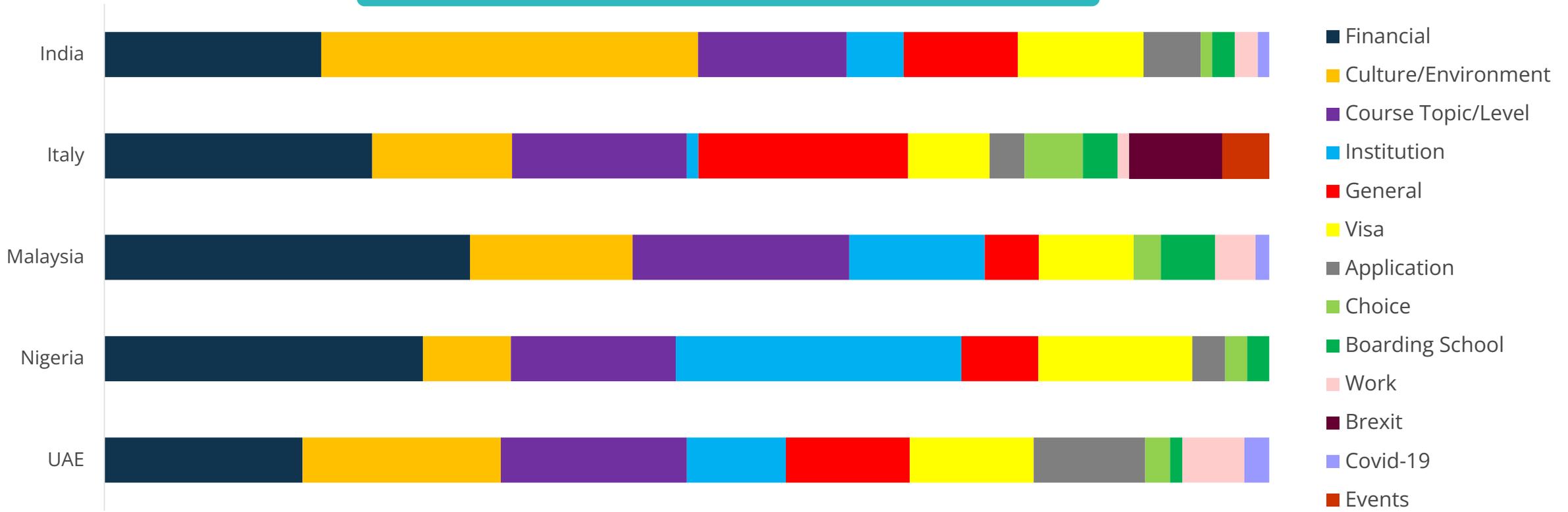
\* Data not available for China.

# While questions around UK culture and how to finance a UK education drive traffic to the Study UK website.

The availability of scholarships is a significant topic. In Malaysia and the UAE, students also search for UK institutions that have trans-national partnerships with their home country.



Share of Search Topics Driving Website Traffic by Market\*



\* Data not available for China.

# Search Analysis for Nigeria

'Why' and 'how to' study in the UK in general are the key topics driving searches on Google. The information needed to prepare applications and access funding also drive searches

## General Study (46%)

- Searches for 'why' and 'how to' study in the UK
- Looking for information on whether a pregnant woman can study in the UK and statistics about Nigerian students studying in the UK
- Information about relocation to Australia and U.S. is also searched for

## Application (19%)

- Seeking information in to help prepare for interviews, personal statements and scholarship applications
- Requirements on what is needed to study a specific subject, or in the UK in general are also looked for

## Financial (12%)

- Searches for scholarships, student funding opportunities and the costs associated with studying in the UK

## Choice (12%)

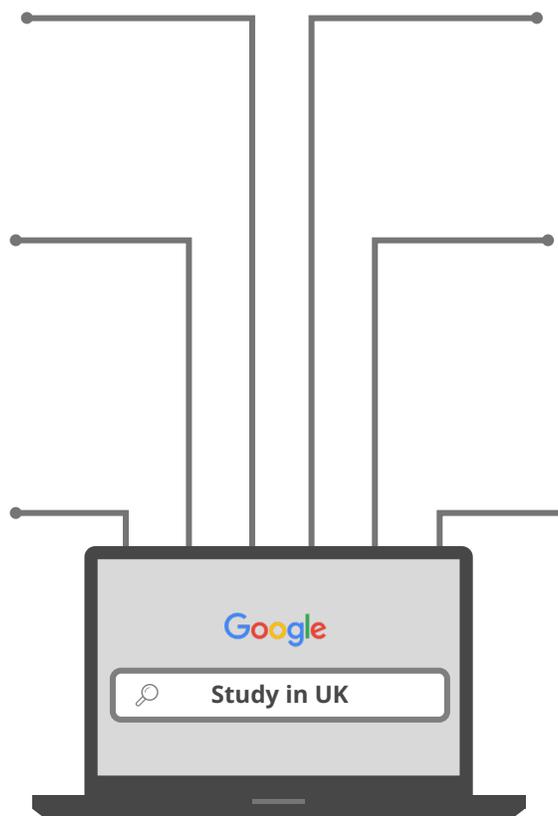
- Searches around the benefits of studying in the UK, sometimes in comparison to other English-speaking countries

## Work (Concurrent) (6%)

- Trying to find out whether international students can work while studying in the UK

## Visa (5%)

- Seeking information about the visa types required to study, post-graduate work permits, visa switching and extensions, and possibility of attaining permanent UK residency after studying
- Searches for family visas and the visa holder's eligibility to work



Search Data: Google.

Search volume (%) by topic is based on the average number of monthly searches of related keywords over a 12-month period. Because multiple topics may be included in a single search, percentage data may not equal 100%.

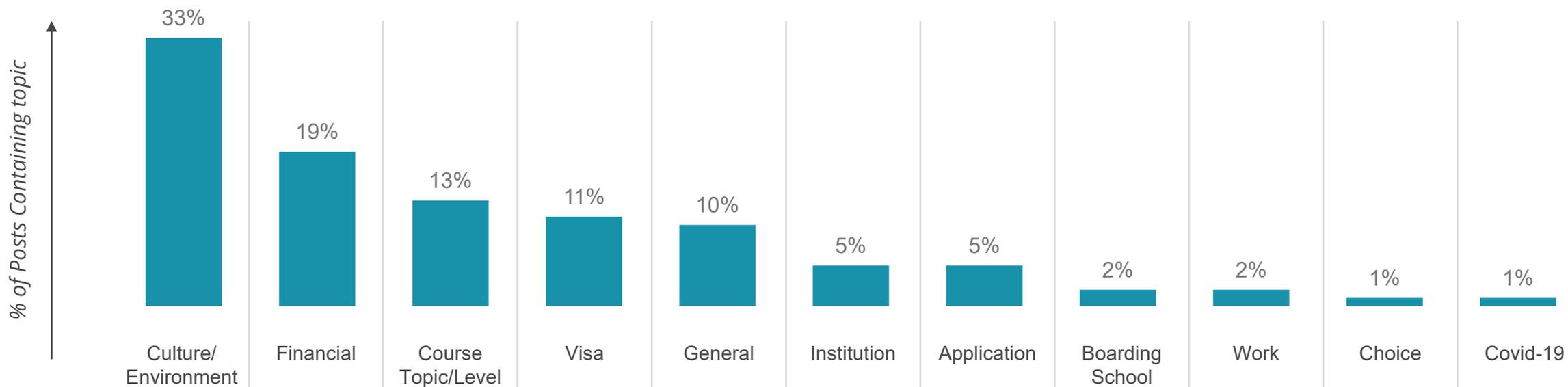
## Website Traffic Analysis for India

People based in India visited [study-uk.britishcouncil.org](https://study-uk.britishcouncil.org) **50.3K** times in February 2022.

People based in India visited <https://www.britishcouncil.in> **325.8K** times in February 2022.

There are 3.8K key search terms leading people to visit the UK website, and 18.1k key terms leading people to visit the India domain. We conducted an analysis of the **top 100 search terms** (driving 91% of website visits). Within this data, we identified 11 search topics that lead people to visit the site:

### Topic Footprint in Website Traffic Search Data

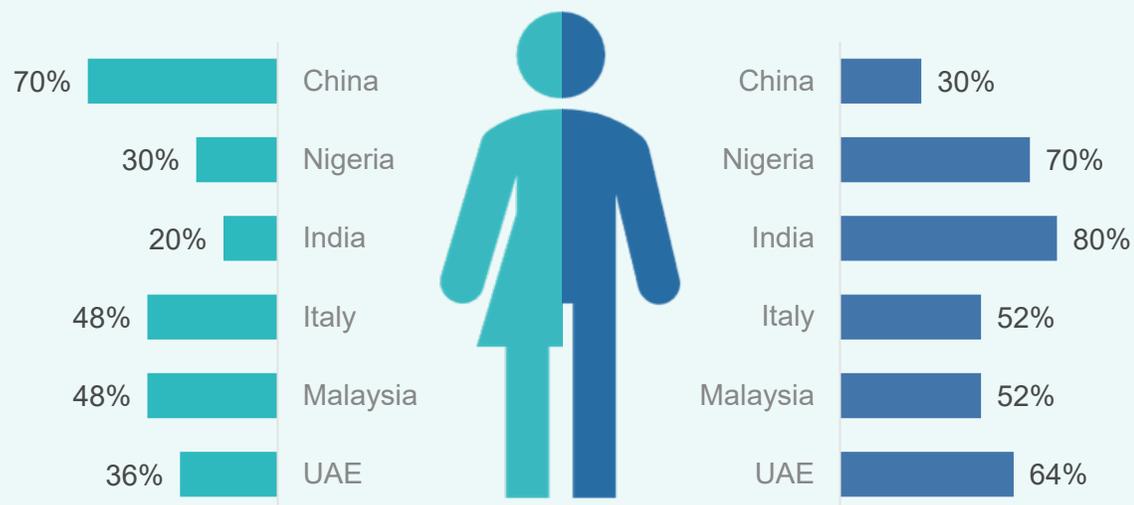


*Data covering February 2022. Because multiple topics may be included in a single search, and searches consisting of single, unrelated words such as 'great' or 'commonwealth' were not included in the data reviewed for these slides, percentage data may not equal 100%.*

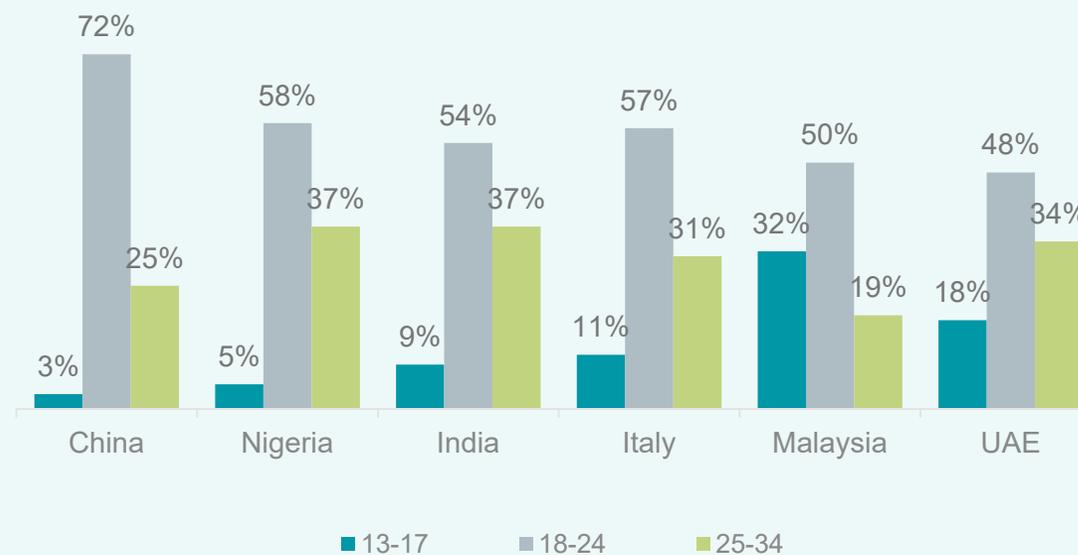
### 3. Student profile estimation

- Twitter conversations in non China countries are driven by boys/men, but in China Weibo conversation by girls/women appear to be more vocal
- Discussion in all markets is most likely to come from 18-24 year olds, with Malaysia having the largest share of conversation from people aged 13-17.

#### Gender



#### Age



# Young Twitter users outside China tend to show an affinity for similar social platforms, and can likely be reached most efficiently via these platforms.

These are the platforms which the audience is more likely to share links to, link or mention in their bio, and engage with content containing links to, when compared to the country average

China	Nigeria	India	Italy	Malaysia	UAE
					
					
					
					
					

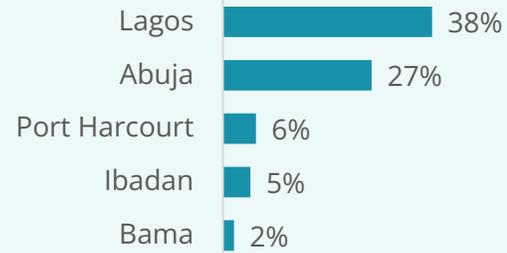
# Young Twitter users from the UAE are extremely likely to live in Dubai. In Nigeria, they tend to live in Lagos or Abuja.

## Where They Live

### China



### Nigeria



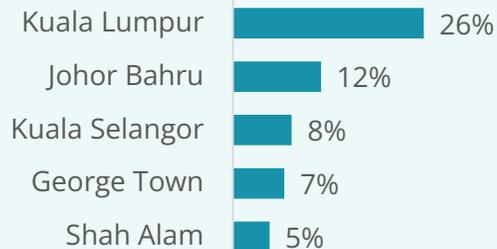
### India



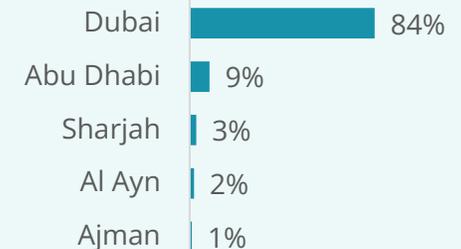
### Italy



### Malaysia

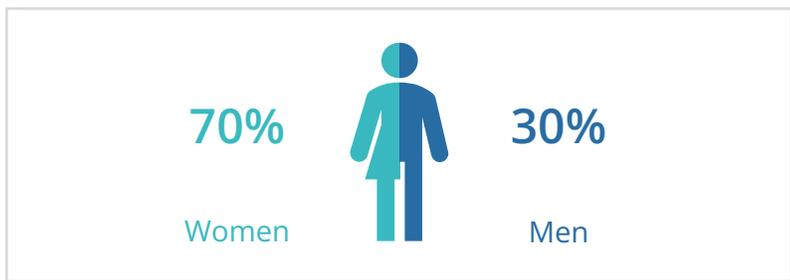


### UAE

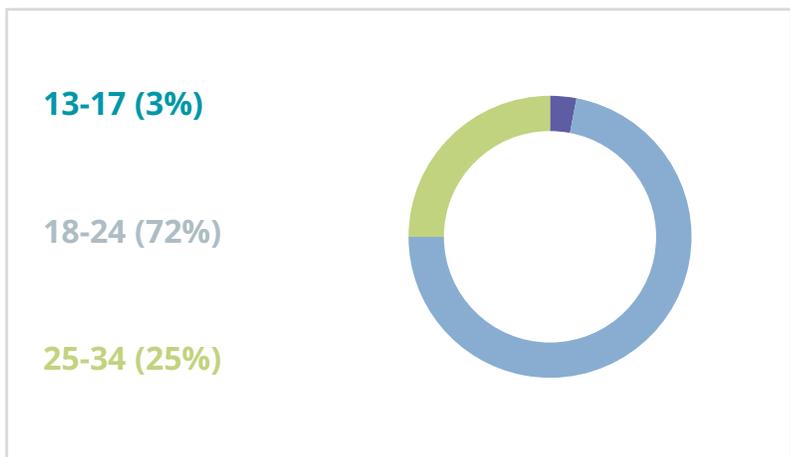


# Who are young Chinese Weibo users?

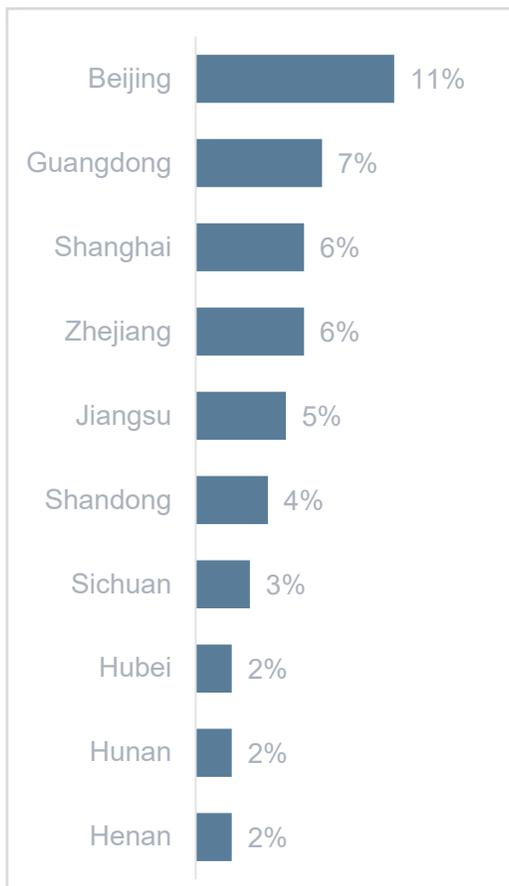
## GENDER



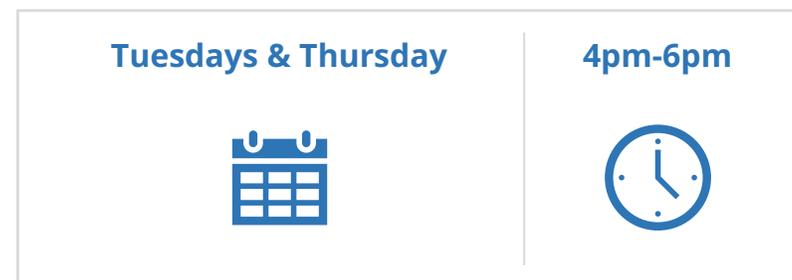
## AGE



## WHERE THEY LIVE



## WHEN THEY GO ONLINE\* (Weibo only, last 30 days)



\*Local time, based on last 30 days of data

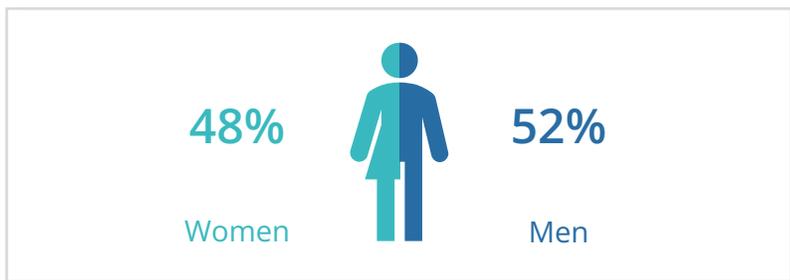
## PREFERRED SOCIAL MEDIA PLATFORMS\*



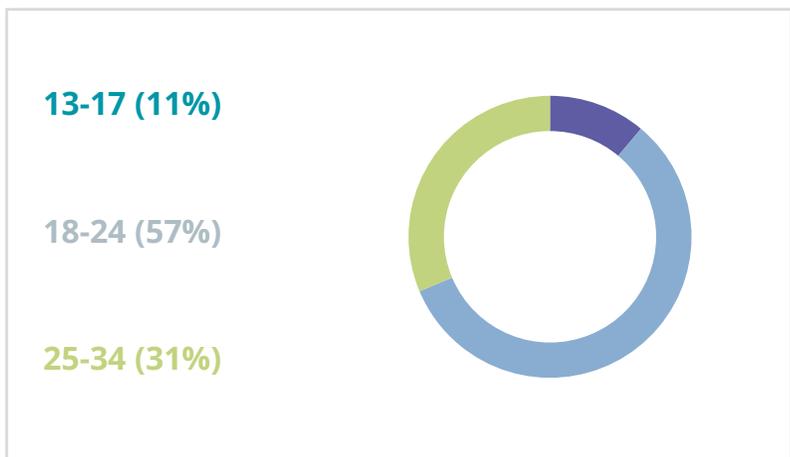
\*Of Weibo users <35

# Who are young Italian Twitter users?

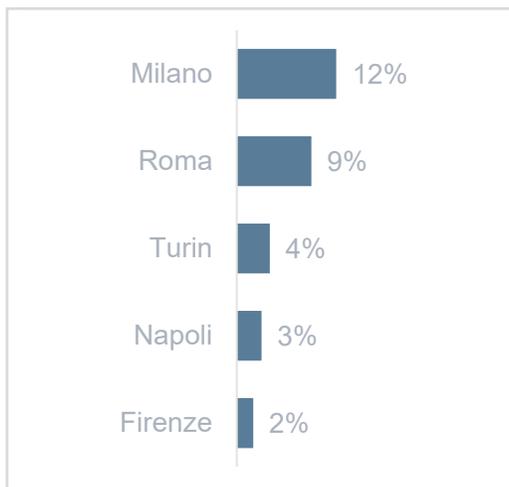
## GENDER



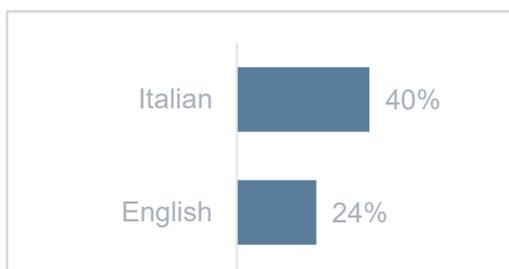
## AGE



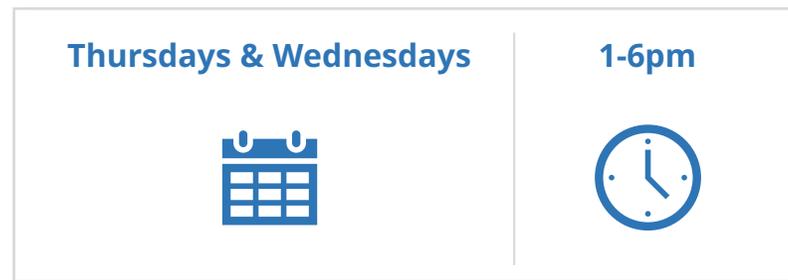
## WHERE THEY LIVE



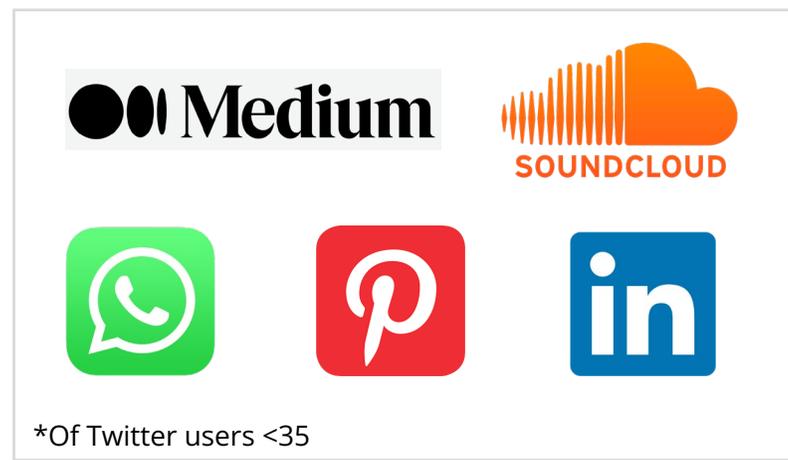
## LANGUAGES USED\*



## WHEN THEY GO ONLINE (local time, based on last 30 days of data)



## PREFERRED SOCIAL MEDIA PLATFORMS\*



\*Of Twitter users <35

The platforms listed are those for which this audience displays the strongest propensity to use in comparison to the country average. They are not the platforms with the highest penetration of platform usage among the audience analysed. Other platforms (e.g. YouTube) will command higher penetration, but the audience does not significantly over-index on these compared to the average. Twitter does not feature as the sample is derived from users of the platform.

\*Language use may not equal 100% as posts which consist only of links, user tags, emojis, pictures or videos have no language indicated. Languages are identified through machine learning algorithms which review user posts and bios.