

How to engage with 'Pandemials'

The new generation of
international students



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ABOUT GLOBAL YOUNG MINDS

Global Young Minds is an AI-powered student engagement platform created by HE experts to empower institutions to attract, engage and retain international students. Global Young Minds' expressed company mission is to connect those who wish to learn with those who want to teach. The platform is designed to enhance brand reach whilst improving conversion and retention rates.

ABOUT SUSSEX INNOVATION

Sussex Innovation is a business incubation network, supporting entrepreneurs, start-ups and scale-ups across the South-East from our hubs in East Croydon, Brighton and the University of Sussex in Falmer. Our members are ambitious companies who are innovators in their fields - solving important problems in new ways. We give founders the strategic insight to help them grow their business and provide practical resources to help manage that growth sustainably.

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INTRODUCTION

“How to engage with 'Pandemials' – the next generation of international students

Sectors across categories are subject to digital transformation and the impact of a new, hyper-connected generation of consumers entering their markets. Higher Education (HE) is no exception to this.

This paper is concerned with how an emerging generation of 'Pandemial' undergraduate students are disrupting Higher Education and forcing institutions to rapidly embrace change to keep up.

According to the blog Spacestor, Pandemial is a new expression related to the terms Gen Z and Zoomer. Generally speaking, a Pandemial is old enough to be conscious of the full impact of COVID-19 on their lives, but not old enough to remember life before 9/11.'

Higher Education is currently faced with recruiting and engaging with the next generation of incoming students. These students are from Generation Z - born between 1997 and 2012/15; there are 68 million of these individuals in the US alone.



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These students constitute an entirely distinct customer who are marketers themselves. These individuals follow, promote and engage on social media and function as consumers through ever more personalised and empathetic platforms such as Netflix and Tinder.

One Pandemial we spoke to in the course of our research explained how they access a portfolio of social media on a typical day: 'I use Instagram to share things happening in my life and see what my friends are doing. I use Facebook groups to learn and share similar interests with others. I use TikTok because it's fun and the algorithm shows me things I'm genuinely interested in (it's not just fun dances). I use LinkedIn to grow and maintain my professional network.'



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Traditional models of marketing communications do not connect with this group and it is starting to impact at scale. According to the Nielsen Consumer Trust Index, 92 percent of consumers trust organic, user-generated content (UGC) more than they trust advertising. Influencers have become a vital part of the marketing mix for generation Z. Almost half (44 percent) of Generation Z has made a purchase decision based on a recommendation from a social influencer, compared with 26 percent of the general population, researcher Kantar found in a consumer study shared with Mobile Marketer. Seventy percent of Gen Zers follow at least one influencer on platforms like YouTube or Instagram, the study found.

According to Anthony Lee, founder and CEO at Global Young Minds, 'The HE sector as a whole lags behind the commercial sector in terms of investment in digital, which sadly remains unchanged. What has changed is student expectations and bias towards brands that can communicate in real time. We are facing a generation that creates and disseminates content unlike any that has gone before. Gen Z will wield that digital influence to make and break brands.'

Pamela Barrett, Director of student recruitment and admissions at University College Dublin says, 'We've seen the trend towards immediacy and personalisation of contact has been going on for a while.'

In addition to this, the HE sector is seeing the emergence of Pandemials – a generational cohort worried about student loans and the ROI they are getting from the university experience during a pandemic, whilst at the same time being fluent and active in the media behaviours described above.

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The situation has resulted in a massive disconnect between this hyper-aware, hyper-serviced, hyper-fluid customer and the static, staid and conservative institutions which service them. For many (and their wider families), university is the biggest financial and career-based decision of their lives – and yet the system itself can feel in some ways completely out of step with them as individuals.

One Pandemial we talked to explained, 'The university communicates with us through emails and newsletters, which often seems very impersonal and inauthentic. I consume media on socials [social media]. Videos are a great way to establish trust in someone and communicate effectively'

This generation utilises A.I.-powered conversational marketing all the time whilst having to deal with Red Brick institutions sending them spam emails. They have a heightened awareness of, and insight into how social media, in particular, functions. One Gen Z international student we interviewed during our research stated, unprompted, that her love of and addiction to TikTok was entirely driven 'by its algorithm – which is SO good'. It is this savvy marketing/marketer mindset that institutions – many of whom still refer to 'digital marketing' rather than 'marketing' – now have to grapple with.

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DEFINING THE
PANDEMIAL
GENERATION

The term Pandemial appears to have been first defined by the World Health Organisation and describes the generational cohort of Generation Z who are now living through the pandemic. Even before the 2020 global crisis, this generation were the subject of a number of notable firsts:

- The first generation to not remember the world before 9/11 and the War on Terror
- The first generation never to have known a world without the world wide web.
- The first generation that has never used a phone with a cord.
- The first generation with no idea what floppy disks are.
- A generation whose relationship with media is almost entirely weightless and virtual.

This generation has also seen seismic shifts in society and culture. They are arguably the first generation to witness the evolution of Climate Change from widely-espoused theory to global Climate Emergency and the UN's Sustainable Development Goals.

They were born after the collapse of communism and witnessed the meteoric rise of China in the global economy. In some regions, Gen Z is the most ethnically and racially diverse generation in history: in the US, one in four is Hispanic, 14 percent are African-American and 6 percent are Asian(1).

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They have also lived through – and continue to live through – tumultuous times. The World Economic Forum characterises this generation in stark terms: 'Today's youth already bears the scars of a decades-long financial crisis, an outdated education system, and an entrenched climate crisis, as well as violence in many places.' Inequality remains a defining factor for global populations, but particularly youth. Pre-Covid, children and youths accounted for two-thirds of the global poor. Covid-19 has severely worsened the situation.

While the share of youth is expected to increase across Africa – where the median age currently stands at just 19.7 years – Oceania, Europe and South-East Asia will see declines in their youth populations by 2050, adding to the demographic challenges of unemployment and ageing in those regions. This macro-trend has long term implications for the HE sector, too.

This generation – as with the M progressive and leading social attitudes. For example, in the US Gen Zers are more likely than Millennials to say they know someone who prefers that others use gender-neutral pronouns to refer to them: 35 percent say this is the case, compared with a quarter of Millennials, 16 percent of Gen Xers, 12 percent of Boomers and just 7 percent of Silents(2).



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The focus of this paper is those Pandemials who are in further education, and who are international students. It is our hypothesis that this group are subject to specific pressures and nuances, before, during and after the pandemic. They are also highly nuanced communicators and their engagement with brands and institutions is dictated by this.

For example, Pandemials are frequently described as 'communaholic'. This means they make no distinction between online friends and real-world friends, and form communities around shared goals and interests, rather than geographic location. According to research by McKinsey published in 2018, 'Gen Zers are radically inclusive.

They don't distinguish between friends they meet online and friends in the physical world. They continually flow between communities that promote their causes by exploiting the high level of mobilisation technology makes possible. Gen Zers value online communities because they allow people of different economic circumstances to connect and mobilize around causes and interests. (Sixty-six percent of the Gen Zers in our survey believe that communities are created by causes and interests, not by economic backgrounds or educational levels. That percentage is well above the corresponding one for millennials, Gen Xers, and baby boomers.)

Fifty-two percent of Gen Zers think it is natural for every individual to belong to different groups (compared with 45 percent of the people in other generations), and Gen Zers have no problem with moving between groups.' One sixteen year-old male survey respondent from Brazil said, 'We each have our own style and way of being, but what binds us is that we accept and understand everyone's styles.'

This has huge implications for institutions which are moving into an increasingly blended, hybrid-working world and attempting to engage with a globalised audience.

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IMPACT OF THE PANDEMIC ON GEN Z

COLLECTIVE ANXIETY

For Gen Z, the impact of the pandemic could be characterised as a collective, mass anxiety which will weigh on them for years to come. Deloitte's Global Millennial Survey found that 46 percent of Gen Z reported anxiety or stress about their job and/or career prospects. 43 percent of Gen Z reported anxiety or stress about their long-term financial future.

Their experience of the pandemic to date has fuelled this anxiety. For example, after the first lockdown, more than half of the UK's final year students lost the job or internship they had lined up for the summer(3). Those aged 25 and under are 2.5 times more likely to be without a job because of the pandemic than the 26-64 age group, according to the OECD.

This collective anxiety is not misplaced. According to the World Economic Forum, for young workers, one month being unemployed at age 18-20 can cause a permanent income loss of 2% in the future (4). Research by Milkround, a graduate careers site, found that only 18 percent of 2020 UK graduates had been able to secure jobs before graduating, compared with 60 percent usually doing so before the pandemic.



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As Universities and schools closed, millions of young adults around the world moved back in with their parents. During the first wave of pandemic lockdowns, 80% of students globally were out of school(5).

In the US, the share of 18- to 29-year olds living at home is the highest ever recorded(6). For thousands of international students, returning home wasn't even an option as borders closed. For some in this situation, their country of study declined to include them in rescue packages.

For example, in contrast to governments in the UK, New Zealand and Canada, Australia did not extend its Covid-19 wage subsidy scheme to foreign students – a decision that has caused a crisis for some of the 500,000 student visa holders who contribute around A \$9bn (\$6.7bn) a year in fees to Australian universities(7).

The impact of this decision was devastating: one in seven foreign students reported being homeless for a period during the pandemic and a third said they were unable to pay for essential needs, as their families could no longer send them money.

One current US student articulated their anxieties as follows, 'You face hours of Zoom university every day, a devalued degree at full freight, diminished job prospects, fear for your elder relatives, and fewer (if any) chances to see your friends or make new ones. It's enough to make anyone a little nihilistic(8).'

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CRISIS IN LEADERSHIP

Many in the Pandemial generation are witnessing a crisis in leadership and in other trusted institutions as governments globally have grappled with the pandemic. For some in this generation, there has been systemic failure which has rocked their confidence in government.

This has been seen across global economies: Brazil has cycled through three different health ministers since the start of the pandemic; leaders such as Boris Johnson and Donald Trump fell seriously ill with the disease themselves after eschewing public health messages.

As a result, trust in government among young people has declined across the developed world since 2016, according to the OECD. 'Their confidence in public institutions and their perception of having political influence and representation in decision-making have stalled,' Elsa Pilichowski, who runs the OECD's Directorate of Public Governance, told the FT(9).

This crisis in leadership has affected universities too. Global and national movements which have sprung up during the pandemic -- such as Black Lives Matter and Everyone's Invited suggest a systemic and engrained failure to confront issues of racism and gender-based violence and abuse.

The Chief Executive of the Office for Students (OfS) Nicola Dandridge has stated there are 'a lack of consistent and effective systems, policies and procedures across the sector' to combat the issues of sexual abuse and assault in some of the country's leading universities, while Professor David Richardson, Vice-Chancellor of University of East Anglia and Chair of University UK's advisory group on eradicating racism on campuses, has said that there is evidence of systemic causes of racism in universities which disproportionately affect students from BAME backgrounds.

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Some Pandemials have been left feeling disillusioned by how many universities and HE sector institutions have treated them at this time.

A Pandemial we spoke to as part of our research explains, 'The only noticeable difference [in communications] I noticed during the pandemic is that the university was sending more emails than usual. As I mentioned above, emails are not a very personable communication in a time where online learning made students feel very disconnected from their peers and the University. The high amount of emails received also meant that we (my friends and I) stopped reading them as they felt repetitive and not meaningful enough to look at every time. The University communication didn't feel transparent enough and seemed more concerned about making sure students were getting tested and respecting rules. It was very alienating and frustrating to be consistently singled out this past year (by the government, press and universities) because of being a student.'

This situation is particularly stark for international students, many of whom actively invested in relocating to an overseas university, only to be studying remotely. Our respondent explains, 'As an international student, I remember emailing my school in September 2020 to complain that we had been misled to believe that classes would be a mix of in-person and online learning, only to find out that all my classes were online for the year. After a week, someone from the school replied to my email and acknowledged my situation, only to forward my email to the Pro-Vice-Chancellor, whom I never heard from. I feel that I was not the only international student in this situation and feel bad for any students who moved overseas for the first time, only to be told to stay off-campus most of the year.'

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COLLECTIVE CONSCIENCE

The pandemic has seen an increase in racial abuse, particularly towards students of Chinese heritage. Chinese students form large parts of the international student population – in Australia, for example, Chinese students make up about a quarter of international students.

The Migrant Worker Justice Initiative found that more than a third of Chinese respondents had suffered verbal abuse since the Covid-19 outbreak in Wuhan. Anti-Chinese hate speech on Twitter increased by 900% during the pandemic, fuelled by commentary from populist politicians such as Donald Trump terming Covid-19 'the Chinese virus'. In the UK, students reported 'high levels of anxiety, discrimination and insecurity'.



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Such collective trauma and the impact of Black Lives Matter and Everyone's Invited has created a 'collective conscience' amongst many Pandemials. This generation feels that they must act to address inequality – and do so in their day to day lives. This is evidenced in their views and actions on the subject of gender identity.

In the US, Gen Z is by far the most likely to say that when a form or online profile asks about a person's gender it should include options other than 'man' and 'woman.' About six-in-ten Gen Zers (59 percent) say forms or online profiles should include additional gender options, compared with half of Millennials, about four-in-ten Gen Xers and Boomers (40 percent and 37 percent, respectively) and roughly a third of those in the Silent Generation (32 percent)(10).

One Pandemial we talked to confirmed this generation's tendency towards activism, 'I agree my age group of students is more activist than previous ones. I think social media is partly responsible for this because it helps raises voices, share the message and learn from others. I have learnt a lot from others posting educational content on their social media platforms (BLM for example). The pandemic has perhaps added to this as everything moved online so the movements and voices active on socials were being heard more than ever before.'

All of these drivers and circumstances suggest a generation of students cut loose from their traditional and historical mooring, if indeed they were privileged enough to have those in the first place – which many were not. The World Economic Forum describes the situation as follows(11): 'Pandemials are at risk of becoming the double lost generation of the 21st century.'

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THE DISCONNECT

The next cohort of undergraduate students will be drawn from this generation and – despite all their anxieties – their enthusiasm for HE has not diminished. Deloitte's research found that Gen Z considers a traditional four year college education more important than ever before(12).

This addressable audience – and the segment which accounts for international students – is enormous. According to OECD data, by 2018, 5.6million people studied overseas, which is more than double the number in 2005. In the UK market alone, in 2016-2017, non-EU international students in the UK brought in £4.7bn in fees – four times more than the entire surplus generated by UK higher education.

According to a report in the FT, 'The money has become an essential part of the funding mix for higher education in Britain. Since government reforms almost a decade ago reduced state funding for research, the sector has been more reliant on financial markets and consumer demand to bring in money(13).' Nick Hillman, director of the Higher Education Policy Institute, goes further, saying, 'Pretty much everything that British universities do loses money, except recruiting international students.'

Yet there is clearly a disconnect here; one which can be described in the following ways.

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DIGITAL PERFORMANCE AND PERSONAS

Gen Z and Millennials are the first 'digital native' generations; that is, they have grown up with and always articulated themselves via digital communications and platforms. This has given them huge advantages in communication skills - and in creating new culture. However, the digital permanence - the footprint - created by this is increasingly problematic, particularly as it clashes with 'cancel culture'.

The singer Billie Eilish - herself still only 19 - made a public apology after online footage of her mouthing a racial slur on TikTok was uncovered. The story highlights how even the most famous individuals are not in control of their digital personas - the platform owns it.

On the Gen Z podcast, *You Don't Know Me*, one young woman's historical comments on Reddit were unearthed when she was at college and she was eventually forced to leave. Referring to her online life, she says, 'Nothing ever really goes away .. I basically managed to f*** up my life with some dumb shit I said when I was 15.' Pandemials are acutely conscious of this risk and therefore digital engagement and platforms must offer 'safe spaces' and protocols that safeguard and nurture, rather than expose.

The Global Young Minds technology solution will not offer a fix-all for young people creating posts they later regret; however, it will help institutions filter out potentially contentious student-generated content, helping protect advocates of their brand. The AI technology will also scan and alert where that content pertains to the University's brand and reputation.

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DIGITAL CONVERSATIONS AND PERSUASIONS

As with leadership, Pandemials are no longer looking at traditional media to form their opinions and insights. We know from the commercial sector that online influencers hold huge sway with this generation. According to a recent report in Forbes, 'Authenticity has been shown in Gen-Z research as a critical element in how they evaluate products and services.

Gen-Z consumers want to be able to trust the brand, understand what it stands for and be confident that they aren't being sold a bag of goods. This is why influencers have become so important. They are an intermediary that can build trust and confidence about a product or service with a prospective Gen-Z consumer.

This is also why upstart Direct-To-Consumer (DTC) brands have been so disruptive in mainstream markets. They understand the fundamental values and decision processes of Gen-Z and also understand that Gen-Z's will turn their backs on traditional leading brands who are too slow or lazy to adapt(14).'

This trend is coming into HE. For example, international student and vlogger Bharat Chaudhary – who is originally from India and studied for a Masters at a public university in Germany – has uploaded to his YouTube channel numerous videos referencing his scepticism of HE recruitment processes. The videos have had 13 million views, and his channel boasts 200k subscribers.

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The huge growth of social platforms such as TikTok has demonstrated that Gen Z consumers engage with content in very specific ways. The mobile app hit 53.5 million weekly average users in the U.S. in the first week of September 2020, according to mobile analytics firm App Annie. Meanwhile, Snapchat has 52 million daily average users in the U.S., according to Apptopia, while Instagram enjoys almost 140 million users every day. In the US most TikTok users are aged 16 to 24, and globally, under 30.

These apps have taken over smartphone usage, too. According to Dr Julie Albright, about 90 percent of the time when the iPhone first came out it was used for making phone calls and 10 percent was using apps .. now it's 90 percent of the time using apps and only 10 percent of the time actually making phone calls(15).'

Clearly, traditional, prescribed media simply doesn't cut it for this group and so institutions and brands must find other channels and presentations to reach them. On the face of it, the HE sector still treats social media engagement as a 'nice to have' rather than a 'need to have'. One Pandemial we spoke to confirmed this 'light touch' approach; 'I believe the university has been more active on social media but I don't think it connects particularly well with me as an undergraduate.'

The opportunity for deeper engagement is there – but universities need to understand how to leverage it. For example, Long Boi is an unusually tall duck based on the University of York campus in the UK. The duck's Instagram account – which was set up by a student – has 32k followers, just one thousand less than the University's own official account.

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ACTIVE LISTENING

Press coverage of the pandemic suggests that students – and undergraduates – do not feel listened to or engaged with, particularly over very genuine grievances during the course of the pandemic.

One undergraduate recently told the BBC – with regards to tuition fees during the pandemic – 'I feel we've been shoved to one side. They just want us to shut up really.' The student was commenting as part of the Higher Education Policy Institute's findings that only about a quarter of students in the UK thought they got good value for money from university in the pandemic.

This was the lowest satisfaction rating since the survey began in 2006. Which suggests that unless HE starts to find ways to genuinely engage with and listen to students' concerns, such feelings will begin to impact their bottom lines. Nicola Dandridge, the Chief Executive Officer of the university regulator, the Office for Students, told the Guardian, 'If we are going to learn lasting and meaningful lessons from the pandemic, listening carefully and responding to students' views will be essential.'



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HYBRID LEARNING

As we have noted, even prior to the pandemic, that Gen Z were adept at blending IRL (in real life) and virtual spaces. This generation of international students are now looking at a hybrid mode of education and employment as global workplaces adjust to during-pandemic and post-pandemic existence.

According to Spacestor.com, '[Pandemials] are very familiar with 'connected' concepts and intuitively understand how to navigate a hybrid workplace that blends the best parts of working in an office and working from home. Because they are so well accustomed to using the latest software and technology, and moving between real and virtual spaces, flexible working arrangements come naturally to Pandemials.'

Hybrid learning can also help with accessibility and address inequalities. Hillary Gyebi-Ababio, vice president of the National Union of Students, recently told the BBC, 'Online lectures, remote access to resources and other digital provision has significantly improved access to education and, offered alongside in-person teaching, gives students greater choice over how they learn'.



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HE must adapt to this if it is to both credibly communicate with and recruit Pandemials – but also engage with them whilst they are learning. Those institutions that get on the front foot with both hybrid learning and communications will most effectively engage with and motivate these students.

“ Antony Lee says, ‘The idea when creating the Global Young Minds platform was to empower institutions to connect with students throughout the student journey. The sector - and the tools that serve the sector - have traditionally looked at the separate portions of student recruitment and engagement. There tends to be very little strategic cohesion not only across platforms and solutions, but even across university departments. That approach won’t work with today’s student customers, so we built a solution.’

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THE SOLUTION



So what is to be done to address this fundamental disconnect? The pandemic has not only created a student cohort of Pandemials with very specific needs, desires and anxieties. It has driven necessary digital transformation across sectors – most notably in healthcare and the corporate world – but HE has also been dramatically impacted.

As Anthony at Global Young Minds explains, 'The change has been fundamental. The sector has a long history of frequently flying staff and face to face student fairs. The shift to online has been abrupt, releasing a genie that will be difficult to put back in the bottle and exposing many years of under-investment in technology and digital solutions in the HE sector.'

Digital transformation has become a unifying factor for the international audience in particular. Anthony notes, 'There will always be significant differences by nationality, varying languages, channels, academic calendars, and agents and parents' roles. But the shift to digital has been universal.'

Global Young Minds believe that the tools, platforms and insights are now available – and being adopted at scale – they simply need to be embraced and implemented by the HE sector. This will require a cultural as well as logical shift.

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According to Anthony, 'I recently spent some time studying new technologies on a course at Oxford University. It became clear that evolving regulation on data compliance and the application of artificial intelligence would fundamentally change how we engage international students. I could see that what had worked in the past wasn't going to work in the future.'

Alongside Global Young Minds, an entire category of digitally-enabled platforms has emerged to service this sector and to mend this disconnect. According to Anthony Lee, 'In my experience, the university staff have a deep and genuine care for student welfare and outcomes, and that hasn't changed'.

What must change is more digitally enabled ways for staff and institutions to connect in meaningful, real-time ways. However – and understandably – there are concerns about the regulatory environment for this.

As Anthony explains, 'For students, the most effective [way of communicating] would be the apps and channels they are currently using to speak with friends. But at the minute that's a Pandora's box of safeguarding and compliance issues for educators'. Hence the emergence of an entire new sector of HE-tech platforms and brands to service this.

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Study Portals is an online aggregator platform whilst Uni Buddy and TAP create peer-to-peer platforms for students. Akerio is a tool for universities which applies paid media best practice. UniQuest applies personalised student journeys to increase engagement with HE institutions. The platform has so far engaged 1.2m students, with over 20m communications and supported 80,000 enrolments on behalf of higher education institutions across the UK and US. The Student Room – based in Brighton – provides a dedicated social media platform for UK students and has grown to become the UK's largest online student community, with 75% of UK students aged 14-24 engaging with the platform.

Global Young Minds positions itself as 'a complimentary as opposed to competing service' to these companies and plans to deploy an open API to enable its solution to function with existing university systems and processes. In this way, the emerging HE SaaS sector will begin to work together to address the current disconnect and start to reconnect with a whole new generation of students.

These platforms seek to transform student engagement and – in the case of Global Young Minds – drive up course completion rates. To create this engagement, institutions must be able to show that they can actively listen. The response to major societal issues illustrates the scale of the challenge for university communities, and the Global Young Minds team believes that their platform can impact everything from student outcomes, to the ability to tackle serious issues of student welfare and safety. Both of these factors may be particularly crucial for British universities' ability to continue attracting high numbers of international students.

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For Anthony Lee, the scale of the current opportunity is clear; he frames the opportunities and threats of the current situation as 'two sides of the same coin. On one side, Gen Z can create and share authentic content, wielding powerful influence. The other side is a generation that expects authentic, personalised, timely marketing. It's the first time – in my memory at least – that marketplace for students will be pretty intense'.

'Ultimately, satisfied students will always be the best possible advocates for the university experience,' Anthony Lee concludes. 'We now have the technology to digitally listen and engage at scale, which was not technically feasible or was too expensive just a couple of years ago.'

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