

TRENDS & TUDES

Keeping you connected to today's youth audience

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EDITORIAL

Our Take On It



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Do you remember scheduling a time each week that you would be in your dorm room to take the weekly call from Mom and Dad on the landline phone? Well if you remember those days, you can remember that you didn't call it a landline, you simply called it your phone.

On college campuses today you can find students connecting to the Internet wirelessly from the very back quad where students 5 years ago went to escape reality for a 20 minute Frisbee toss or hacky-sack circle. Today's college student is attached to their phone, PDA and assorted communications device 24/7 – no more scheduling a time to talk, unless you invited them to a meeting using Outlook meeting planner.

In just a week or so, America's highways will be filled with college students on the way back to campus. So, let's play a little Now-and-Then with the "essentials" – save for

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On Campus and Beyond: College Students Today

By Linda Crane, Research Associate, Youth and Education Research



What is life like for today's college student? Is it filled with books, friends and the latest technology? Or are there other priorities that command the attention of today's college student?

Since 2001, Harris Interactive has conducted the annual *College Explorer Report* on behalf of Alloy Media + Marketing, a study that offers insights into the life of a college student and what exactly it means to be a college student today. This year's *College Explorer* reveals a new wave of college students that is distinctly different from college students from as recently as five years ago. The 2007 *College Explorer* paints a portrait of a generation of college students whose influence and presence extends beyond just the class-

room; they have impressive purchasing power, are highly connected, and rely more on technology than any other college generation before them. This year's findings are based on a national survey of 1,592 college students (full-time or part-time, at 4-year or 2-year institutions) ages 18-30, conducted between April 11 and April 30, 2007, and explore the latest trends in technology and online activities, as well as consumer behavior, spending and the top of mind issues for students in the upcoming presidential election.

There are currently 17.6 million students attending colleges across the country, 2.3 million more than occupied college campuses five years ago. In fact, there are more students attending college

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clothing and bedding – to be wedged into the back of the car.

Then – 20 years ago: typewriter in plastic case, extra ribbon, liquid paper, stereo with am/fm, cassette player and turntable, 4 large speakers, 3 plastic milk crates full of vinyl albums and cassette tapes, and an Atari console and 4 joysticks. A phone purchased from the local AT&T store the size of a shoebox. Girls also had a large padded back rest. For graduation a relative might give them a subscription to a major magazine like *Time*, *Newsweek* or *Cosmo*. Total space taken up in the car: the entire back end of a standard Ford LTD station wagon or pick-up truck.



Then – 5 years ago: desktop personal computer with console, 17 inch screen, printer and paper, Xbox or Playstation2, plastic carrying cases full of CDs and video games such as Grand Theft Auto and Madden 2002. Your landline phone for your dorm room fully loaded with portable handset that allowed 100 feet of roaming space and auto speed dial for 10 of your favorite numbers. Subscriptions given to the student included *The Wall Street Journal* and *Entertainment Weekly*. Total space taken up in the car: most of the back of a standard SUV.

Now: Laptop computer, fully loaded media package including CD/DVR burner, 20 inch digital monitor, full digital package so they can watch movies, game with friends and email their family and friends around the world. Cell phone and acces-

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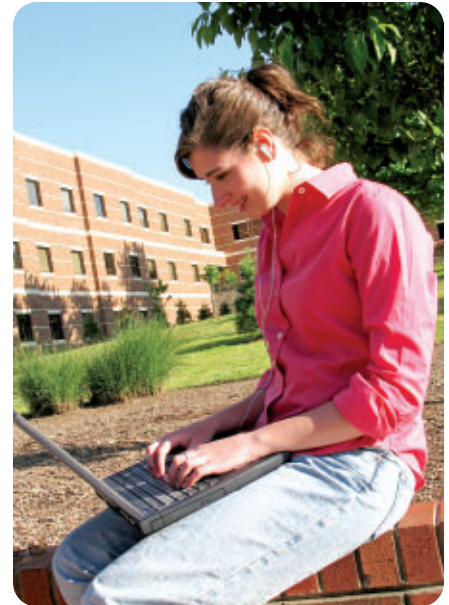
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today than ever before, and their influence is expected to reach nearly 19.9 million by 2015. The 18-30 year-old college population is over 2.1 million larger today than in 2002, and it is growing to be more heavily female (56% vs. 54%).¹ Not only has the size of this population increased over the years, but their influence has also increased.

College students today are the most active college consumers of all time. This population spends a projected \$263 billion annually, a \$62 billion increase since 2002. College students' projected spending on discretionary purchases alone amounts to \$63 billion this year – a \$10 billion increase since 2002.² The greatest share of 18-30 year-old college students' discretionary spending goes towards food purchases, amounting to over one-third (37%) of their total discretionary spending. The second largest share of their spending is on clothing and shoe purchases, which makes up 12% of this population's spending on discretionary items.

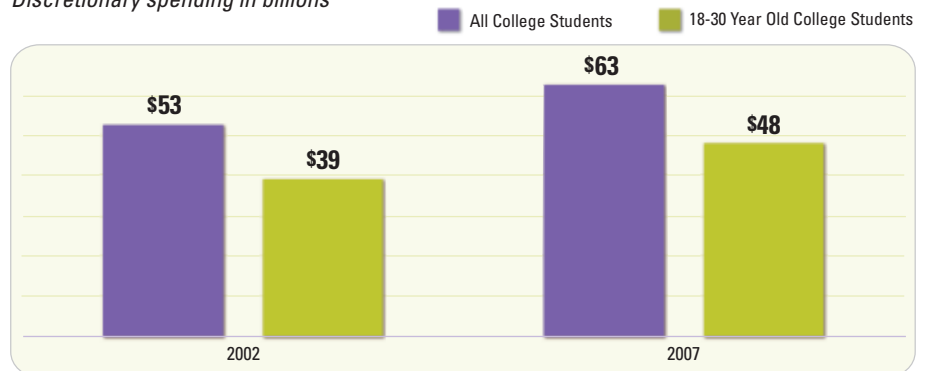
Beyond their purchasing power, today's college students have incredible access to a variety of different technologies. The



amount and variety of technologies available to the college students of 2007 surpasses what has been available ever before. College students are using more tech gadgets than students of the past and more frequently.

With the onset of more advanced technologies, the devices favored among college students today are more compact and portable compared to the devices owned in the past. These devices allow college students to stay connected wher-

College Students Spending Projections
Discretionary spending in billions



Base: U.S. 18-30 year old college students (n=1,592)³

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sories about the size of a deck of cards, an mp3 player, 200 CDs that fit into a padded notebook carrying case, gaming gear, and digital camera. That padded back rest in 1987 is now a fully integrated entertainment system with hidden speakers and an mp3 hook up. Now, students receive most of their news and entertainment news through online subscriptions, free content sites and their best friend's blog. Total space taken up in the car: fits nicely into the back of seat of a standard four-door sedan.

Today's college students are pocket-sized, portable, personal and wireless.

Digital communications devices in 2007 – either phone, mp3 player, text messaging device or camera – can be found on nearly all students allowing for instant communications or entertainment, fully personalized for their tastes. And if they don't have one yet, they are planning to purchase one soon.

Today's campuses have jumped on board the "wireless" train, with nearly 3 in 10 campuses now offering blanket coverage throughout, and those that aren't completely wireless are moving that direction, covering dorms, classrooms and libraries with Internet connectivity, feeding students' need for laptops instead of desktop computers.

Alloy Media + Marketing's annual *College Explorer* report says that, "Demand for mobility is also expressed via the annual decline of desktop ownership in favor of laptops. With a 21 point increase of laptop ownership in the last two years alone, the dorm desktop appears as "old-school" as the word processor did in the '90's."

Alloy's report also talked about the rise in the discretionary spending since the study was first conducted in 2003, noting "not only is their discretionary spending year to year on the rise, college student's influence over purchases and influence

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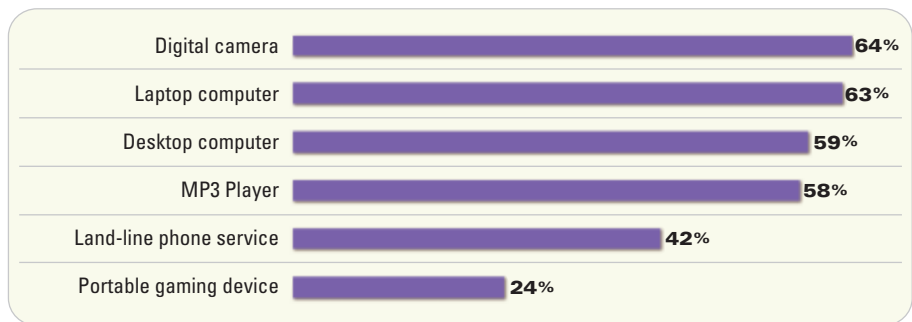
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ever they go. For the first time ever, desktop computers are not the preferred computer among college students. As recently as 2005, three-quarters (74%) of all 18-30 year-old college students owned a desktop computer while only four in ten (42%) owned a laptop. This year, laptop computers are favored slightly more than desktop computers among college students. Nearly two-thirds (63%) of all college students own laptop computers this year, compared to 59% who own desktop computers.

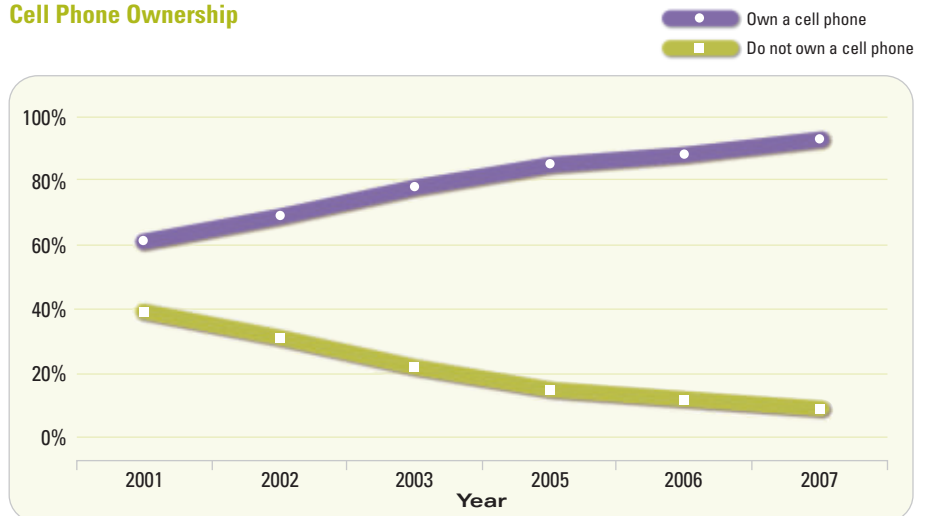
Further supporting their need for technologies that keep up with them, portable gaming devices are owned by one-quarter (24%) of today's college students. MP3 player ownership among college students is over four times what it was five years ago, increasing from 13% in 2002 to 58% today. Digital camera ownership has more than doubled since 2002, with over six in ten (64%) college students owning a digital camera today compared to only three in ten (30%) five years ago.

Technologies Owned Among College Students



Base: U.S. 18-30 year old college students (n=1,592)

Cell Phone Ownership



Base: U.S. 18-30 year old college students (n=1,592)

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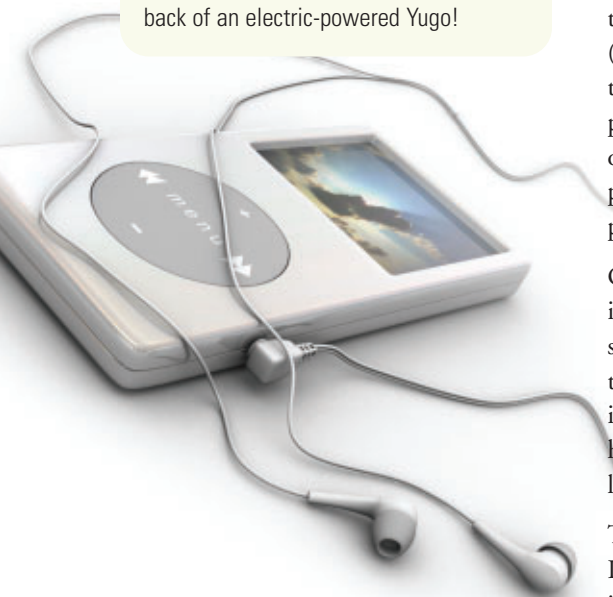
over their peers continues to grow. Recommendation from peers has always held import with this group, but widespread web communication has propelled the impact of student influence over popular consumption.”

All marketers must find ways to tap into three major forces in college-aged marketing:

- 1) Make sure it can be personalized
- 2) Make sure it can be portable
- 3) Lean on peer-to-peer for marketing

One of Harris Interactive’s clients – an old-school college textbook publisher – took the time to **listen** to college students’ needs and jumped aboard the digital superhighway finding ways to deliver their products in byte-sized downloadables for all forms of portable media, providing study tools and guides not found in their college bookstore and developing online global study forums.

Just a few short years ago, many of today’s necessities were luxuries only available to the wealthy or most far-sighted techno-enthusiast. Who know what essentials await the Class of 2012 or 2017? But count on them to be interconnected, even more personal – and small enough to fit comfortably into the back of an electric-powered Yugo!



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Cell phone ownership among college students also continues to rise. Virtually all (93%) college students today own cell phones compared to less than seven in ten (69%) in 2002. And college students today use their cell phones for more than just talking. Eight in ten (81%) students use their phone for something other than conversations. Nearly seven in ten (69%) college cell phone owners use text messaging capabilities on their cell phones. In addition, nearly half (47%) of all college students that own cell phones today, take, send or receive pictures on their cell phones.

Given the rise of cell phone ownership it is not surprising that today’s college students use landline phone services less than their cell phones. Nearly six (58%) in ten of today’s college students do not have landline phone service where they live during the school year.

Today’s college students are using the Internet for more than just email and instant messaging; online activities

among college students today extend to social networking sites, virtual community sites, and user generated media sites. Today, over half (54%) of college students visit social networking sites every day. In fact, social networking sites are the preferred mode of communication among today’s college students for staying in touch with friends (27%) and reconnecting with friends from the past (31%). Nearly three-quarters (73%) of all college students visit user generated media sites like YouTube.com and Collegehumor.com.

In the past five years, daily online gaming (9% in 2002 vs. 23% today) and downloading of music (10% in 2002 compared to 25% today) has more than doubled. In addition, college students today are ten times more likely than college students in 2002 to use the Internet to purchase goods or services (20% this year vs. 2% in 2002) and to research products or services online to later purchase offline (29% this year vs. 3% in 2002).⁴

With increasing technology ownership and increasing online usage it is clear that today’s college students are the most tech savvy generation of college students to date.

Reference List

¹National Center for Education Statistics, 2007

²Projected to the population of college students in the United States, National Center for Education Statistics, 2007

³Projected to the population of college students in the United States, National Center for Education Statistics, 2007

⁴2007 question was, “In a typical day which of the following do you do online,” 2002 question was “How often do you do the following online activities – daily, a few times a week, a few times a month, less often, never.”



Dad, can I have the keys?

AutoYOUTHSM 2007 Available

Sports car, SUV or Minivan? Standard radio or 6-disc CD-changer? Just how much influence do teens and young adults have on family vehicle purchase decisions? **AutoYOUTH** is a joint effort between our Youth practice and Automotive and Transportation research groups, and the 2007 study is available. This annual study collects and analyzes feedback from various youth segments concerning brand preference formation, early vehicle purchase influences, and new vehicle purchase intention by segment and brand.

To learn more about **AutoYOUTH**, contact us at **877.919.4765**.

Contact Us

To make suggestions regarding this newsletter or to discuss a business issue involving youth or the people and issues that influence today's youth, please contact us at **877.919.4765** or **info@harrisinteractive.com**.

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Ask a Question...

...Get an Answer

Have a burning question you would like to ask kids and teens? Here's your chance to submit a free question for our upcoming YouthQuerySM youth omnibus. Just send us an email (**HI_youth_research@harrisinteractive.net**) with your suggestion. We will pick one question each month and then publish the results

in the next issue of the newsletter. YouthQuery is your chance to ask one or a series of questions of 1,100 young consumers nationwide, and get accurate, projectable answers within days. To learn more about YouthQuery, contact us at **877.919.4765**.



(What's New With Youth?)

YouthPulseSM 2007 Soon to be Released

You need to know almost as much about the youth market as you would if they were all your own children. How they spend their time, how they spend their money, their hopes, fears and aspirations and which parts of the kid experience are totally different today than they were a decade – or even a year – ago.

YouthPulse is the only study covering these topics and hundreds of others for kids from age 8 to 21, and the 2007 annual study will be available in September. To learn more about **YouthPulse**, or to order the 2007 study, contact us at **877.919.4765**.

Recent Research for Public Release

1-800-905-GEEK Survey Reveals Children Introduced to the Internet at Three or Younger

Read the results of this new survey, conducted by Harris Interactive, at: http://www.harrisinteractive.com/news/newsletters/clientnews/2007_1800905GEEK.pdf

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