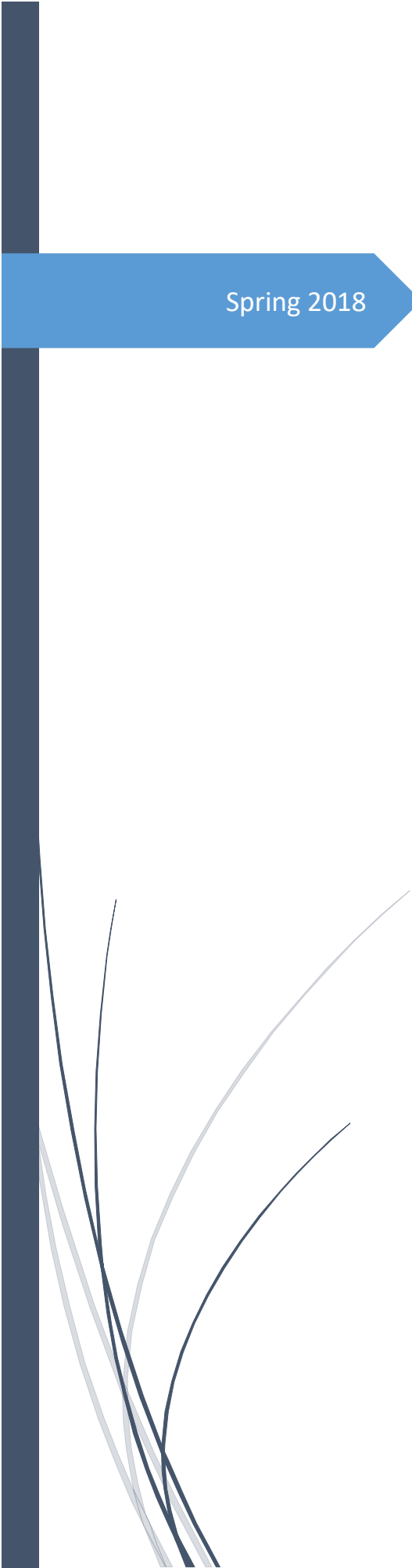


A dark blue vertical bar runs down the left side of the page. A blue arrow points to the right from this bar, containing the text 'Spring 2018'. Below the arrow, several thin, curved lines in dark blue and light grey sweep upwards and to the right.

Spring 2018

College Student Back-to-School Survey

2018 College Back-to-School Student Survey

Trends & Statistics

Survey Overview

Over the fall of 2017, OnCampus Advertising conducted a 12-question online survey to college students attending more than fifty universities across the U.S. The goal of the survey was to evaluate the habits and trends affecting student's purchasing decisions and spending patterns during the back-to-school season. The survey includes college students of all academic years at both public and private universities.

Methodology

OnCampus partnered with WhatsGoodly, an independent survey company specializing in the college market, conducted the survey and verified the results. Student respondents were not compensated for completing the survey.

The survey produced 658 student responses leading to a margin of error of +/-4% at a 95% confidence level. Respondents had the option to identify their gender with 232 females and 90 males electing to do so. Not every student respondent answered every question in the survey.

2018 College Back-to-School Student Survey

Trends & Statistics

Results

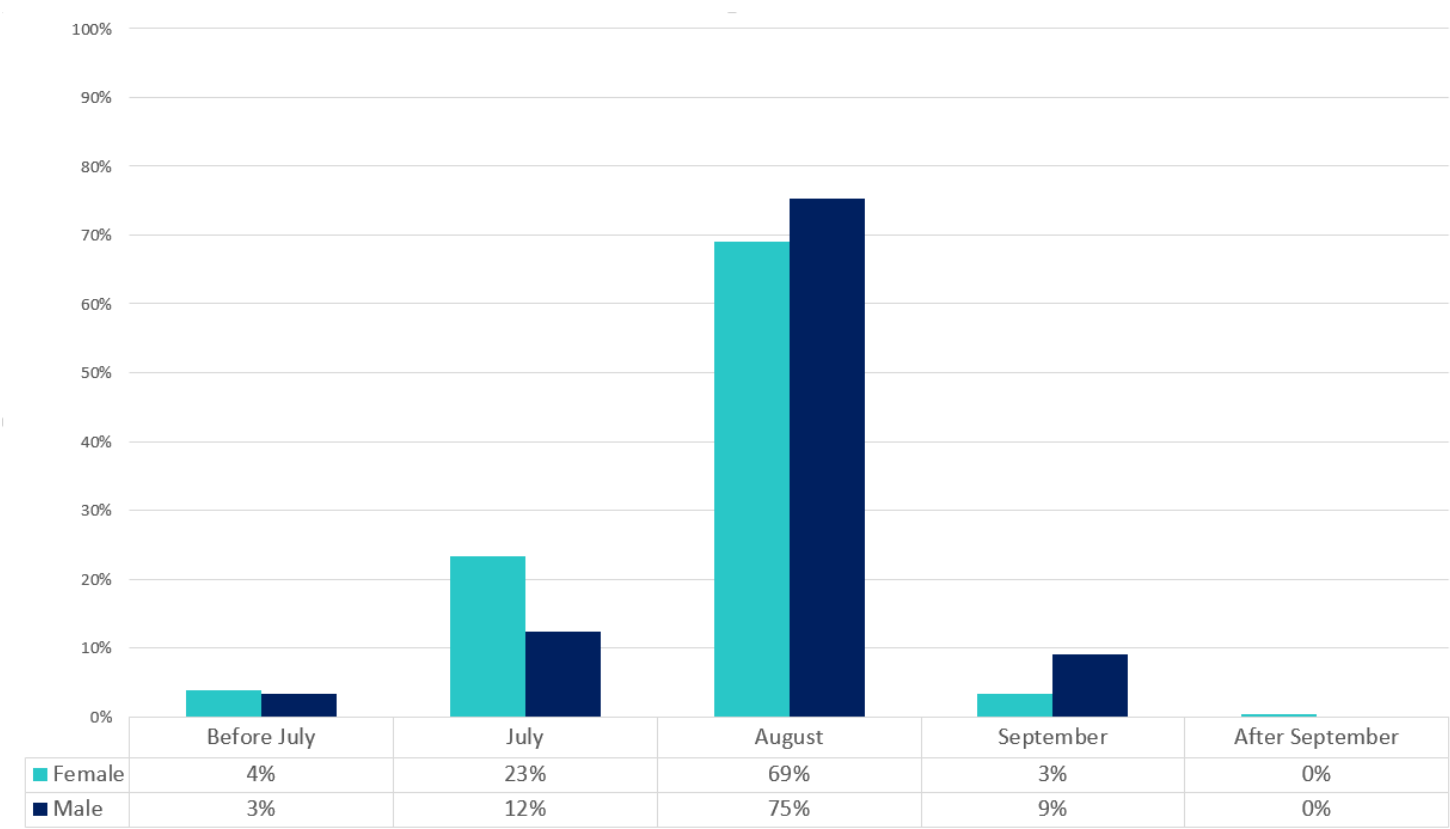
Back-to-School Shopping Time Period:

The general belief that most students procrastinate over the summer months with their back-to-school shopping is accurate. Respondents confirm only 25% start shopping before August with female students heavily influencing this statistic at 27% vs. their male counterpart at 15%. For retail marketers, this trend provides an opportunity to reach 72% female and 85% male college students within weeks of the start of their fall semester.

When do you do most of your back-to- school shopping?

Female respondents = 232

Male respondents = 89



2018 College Back-to-School Student Survey

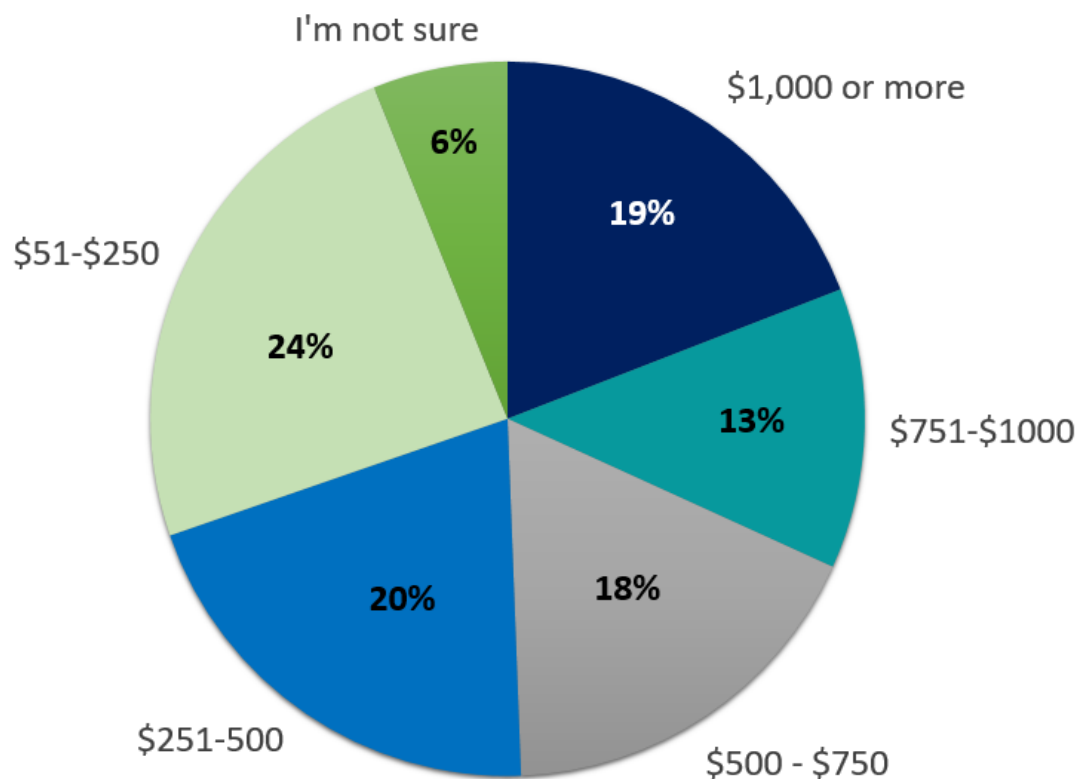
Trends & Statistics

Student Spending Levels:

Over the last five years student spending has gradually increased. Fifty percent of the student respondents say they will spend \$500 or more while 19% anticipated spending over \$1,000. Male students are more likely to spend over \$1,000 compared to female students, 25% and 14% respectively.

How much do you expect to spend in total on back-to-school shopping?

Student respondents = 528



2018 College Back-to-School Student Survey

Trends & Statistics

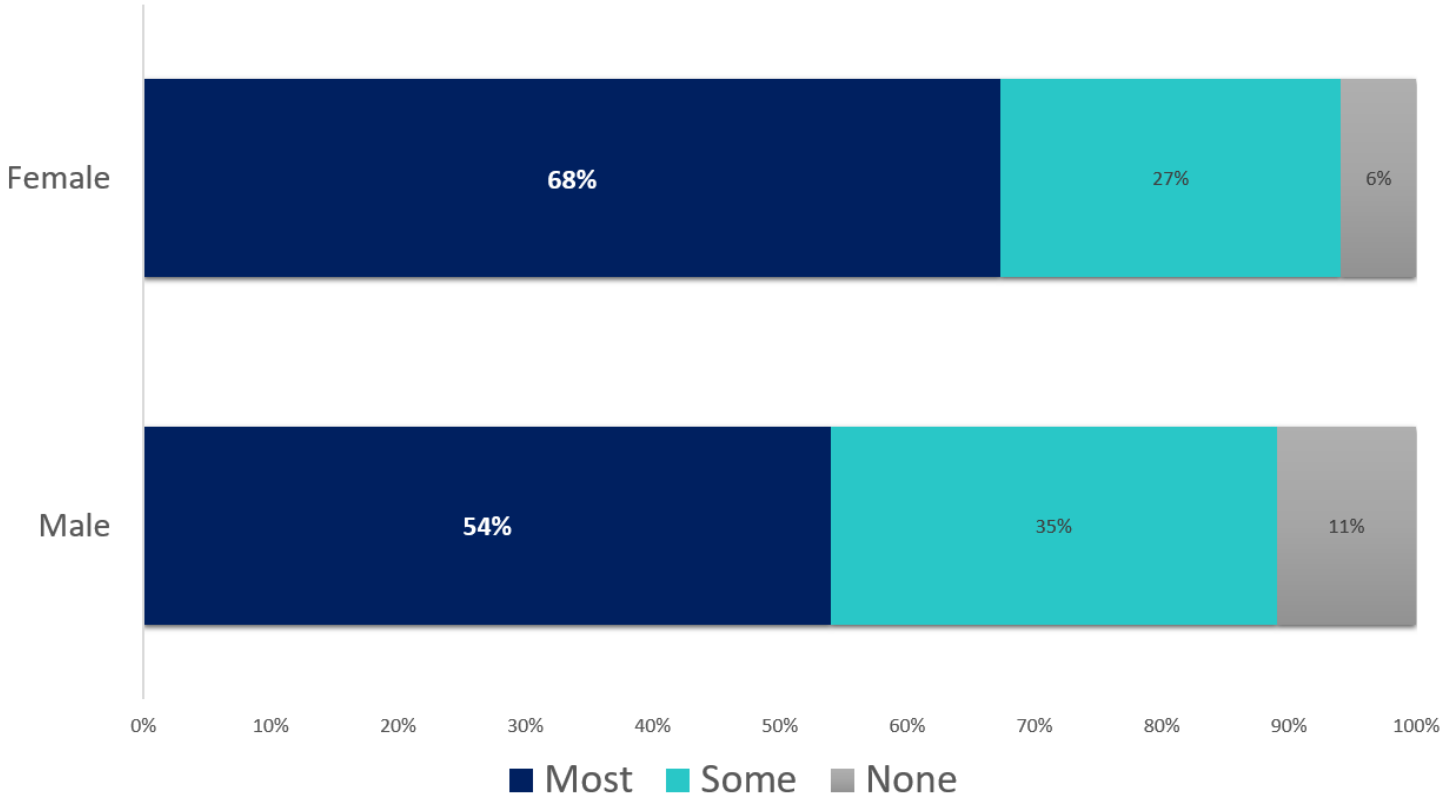
Parent Spending Trends:

Today, students may have more discretionary money to support their lifestyles than in years past. However, 64% of all back-to-school purchases are made by their parents, skewing 68% female versus 54% male students. Only 7% of students pay all of their own back-to-school expenses.

Usually, do your parents pay for your back-to- school purchases?

Female respondents = 229

Male respondents = 89



2018 College Back-to-School Student Survey

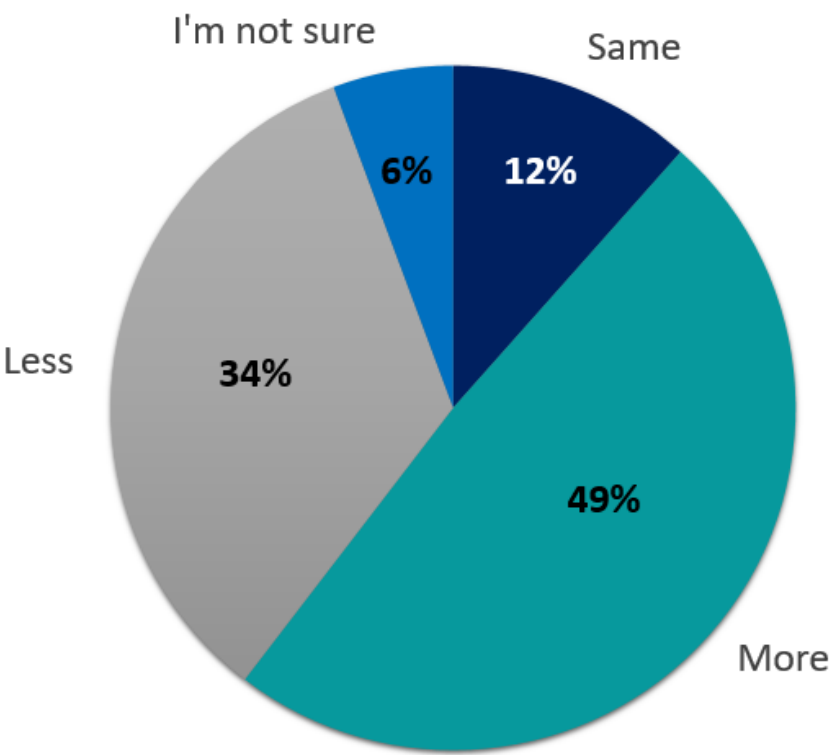
Trends & Statistics

Student Spending Trends:

The continued growth in the economy, record stock market prices, and historically low unemployment rates has created a more secure feeling of financial well-being across many households. This financial security has transcended into the college market. Of the 527 respondents, 61% plan to maintain or increase their spending levels from last year with nearly 50% of them increasing their planned back-to-school spending.

Will you be spending more, the same, or less on back-to- school shopping this year compared to last year?

Student respondents = 527



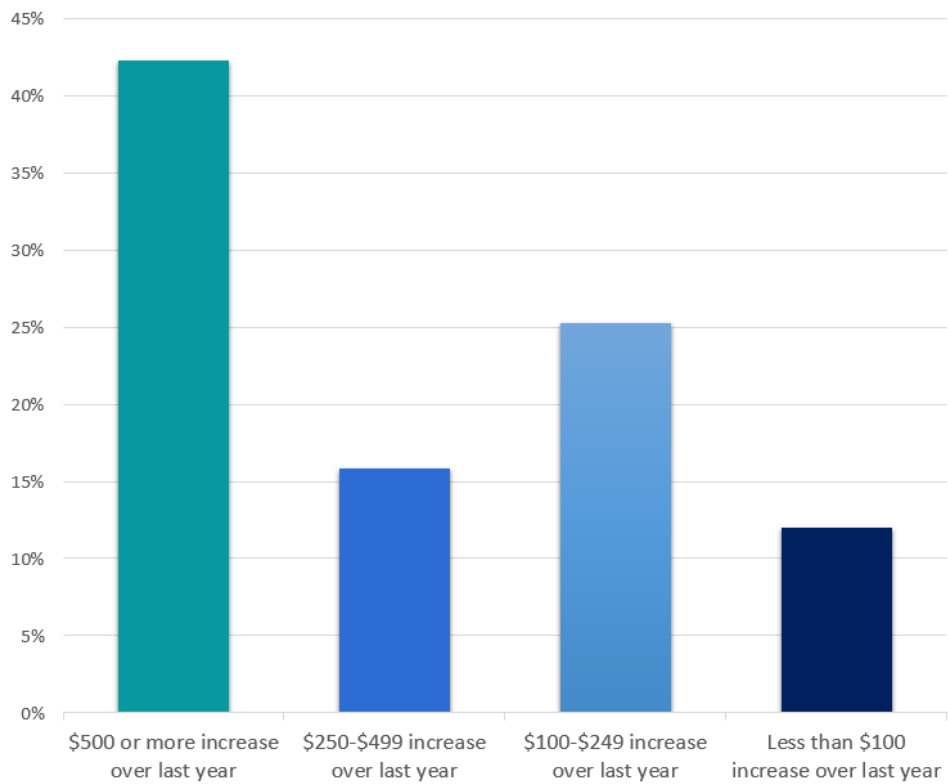
2018 College Back-to-School Student Survey

Trends & Statistics

Spending Increases Year-over-Year:

Over the summer of 2017, students increased their back-to-school spending from the previous year. Of the 298 respondents, 42% of students increased their spending by more than \$500, and of those 20% increased by more than \$1,000.

If answered “more,” how much more do you estimate you will be spending?



2018 College Back-to-School Student Survey

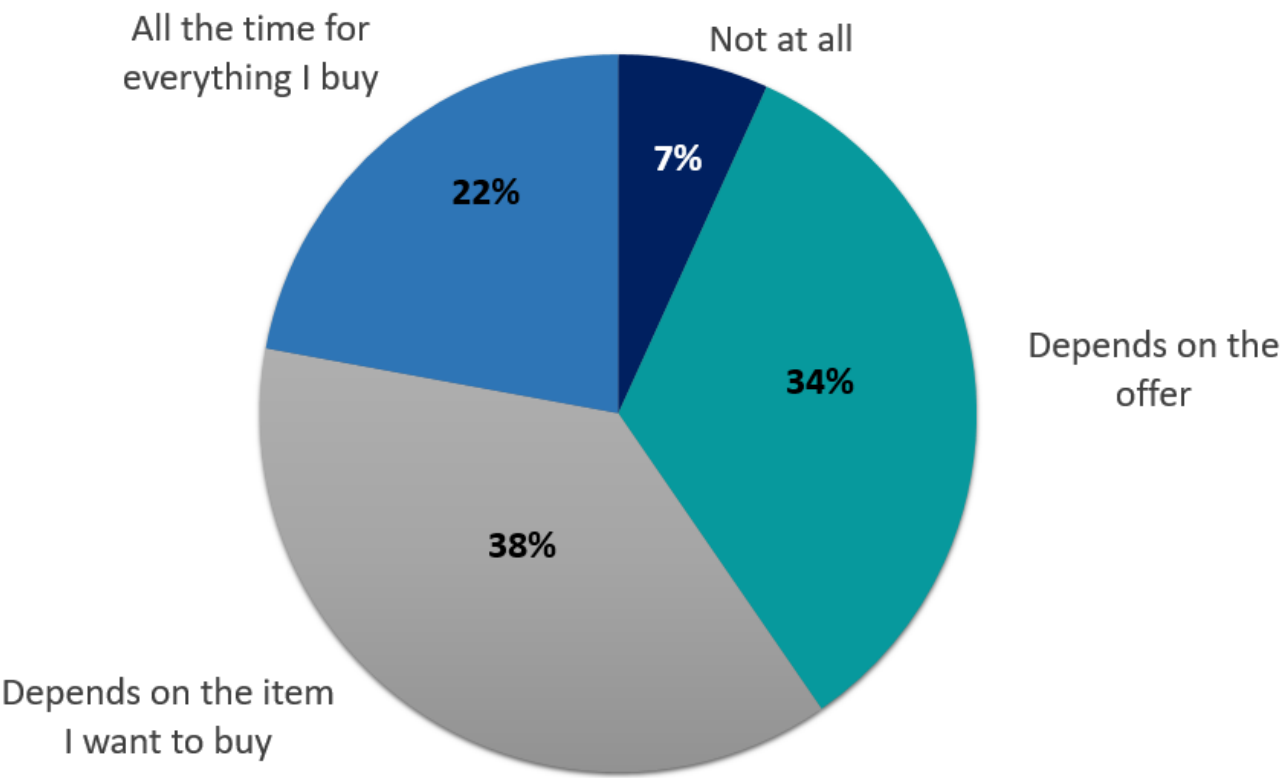
Trends & Statistics

Discount Offers, Coupons, and Deals:

The survey explored the motivating factors for back-to-school purchases. The first question addressed the popularity of coupons and special deals and its effect on purchase decisions. Of the 515 respondents, more than 93% claim coupons have some impact on their purchase decisions with 22% of students responding “All the time for everything I buy”.

How much do coupons and special deals increase the likelihood of you purchasing a product?

Student respondents = 515



2018 College Back-to-School Student Survey

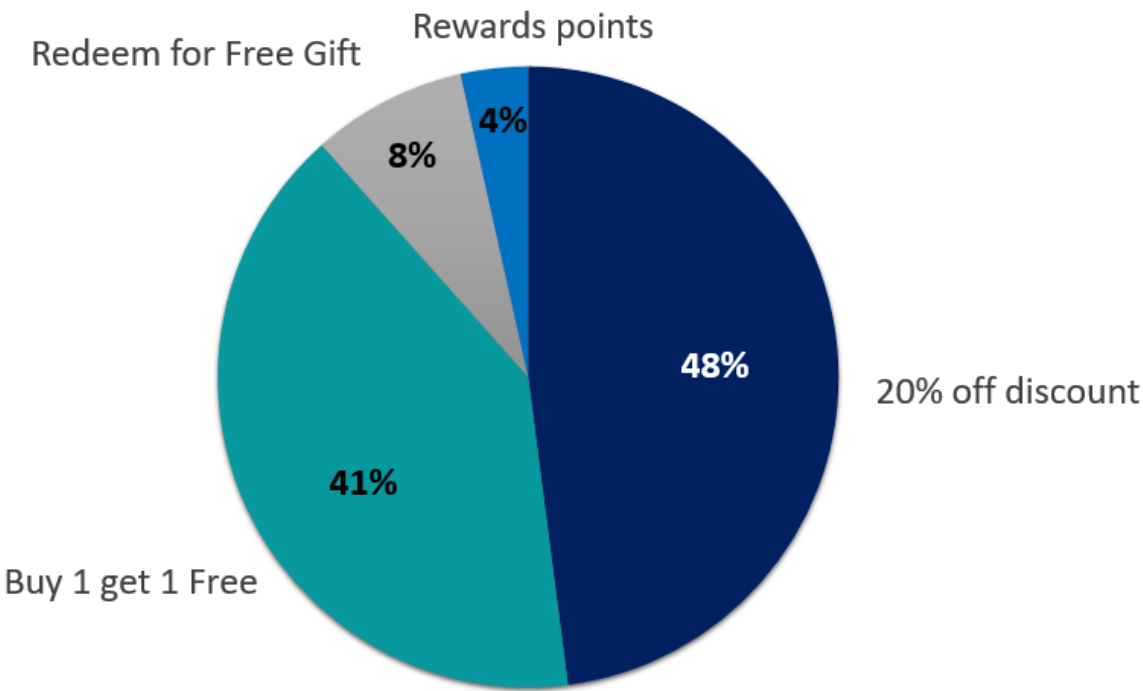
Trends & Statistics

Discount Offers, Coupons, and Deals (cont.):

The survey then asked which deal options were their favorites. The most popular deal options were ‘20% off discounts’ and ‘Buy 1 Get 1 free’ offers. These two discount options received 89% of the total responses. ‘Redeem for Free Gift’ and ‘Reward Points’ were less popular and had much lower response rates.

What type of offer appeals to you the most?

Student respondents = 519



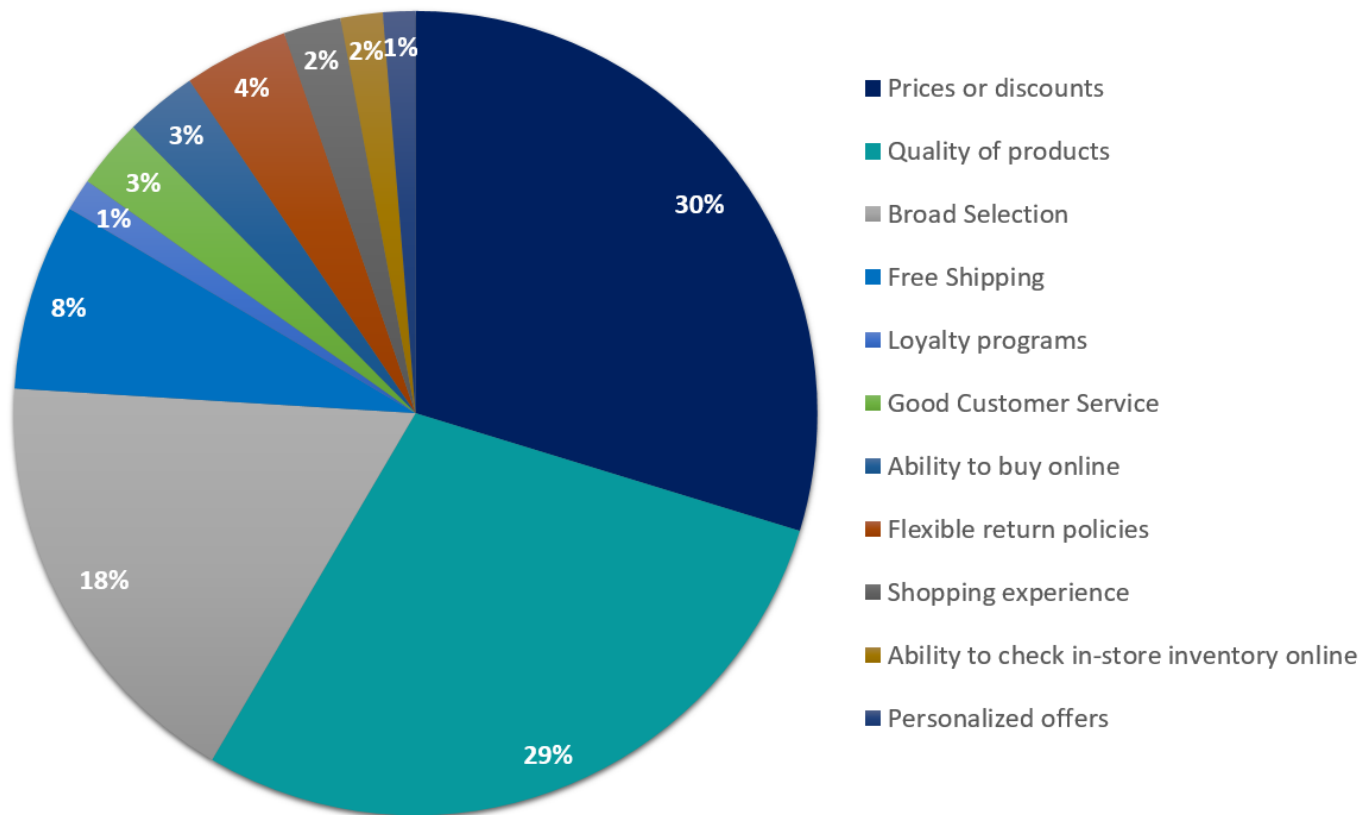
2018 College Back-to-School Student Survey

Trends & Statistics

Purchasing Decisions:

Retail marketers have always analyzed the factors that influence purchasing decisions. Whether it's incentive programs, unique brand offerings, general business practices or some combination, there are numerous factors contributing to consumer buying habits. Student respondents identified three leading factors influencing their purchasing decisions. These factors include: prices or discounts 30%, quality of products 29%, and broad selection 18%. Additionally, several factors were noted for their lack of influence including: loyalty programs 1%, personalized offers sent to the student via email, cell phones, or postal 1%, and ability to check inventory online 2%.

Pick your top 3 priorities from the following list when choosing a retailer for back-to- school products (select 3)?



2018 College Back-to-School Student Survey

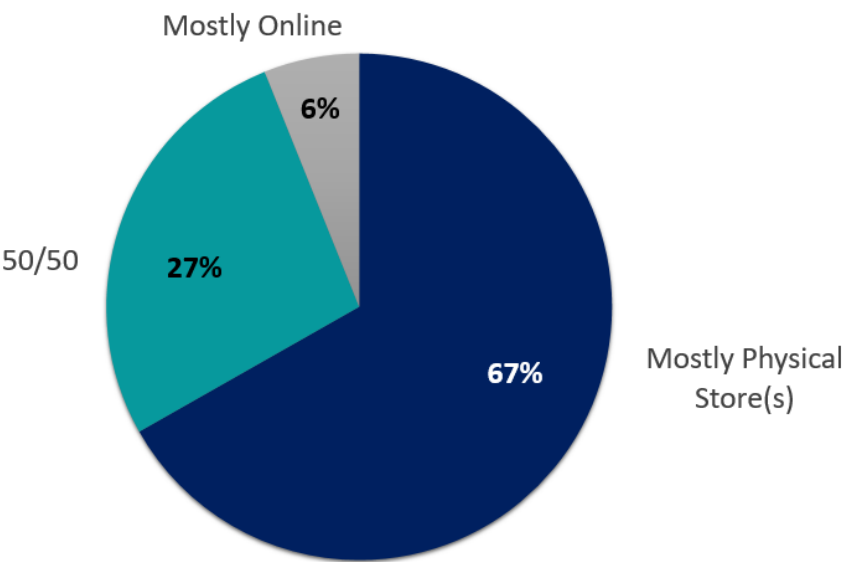
Trends & Statistics

Where Do Students Shop for BTS:

The college student demographic is the most tech savvy and heaviest users of mobile devices and internet services. However, a surprising number of students surveyed, 67%, say they prefer to shop at “brick and mortar” stores rather than shop mostly online for back-to-school purchases.

Will you do "most" of your back-to-school shopping online or in a physical store?

Student respondents = 639

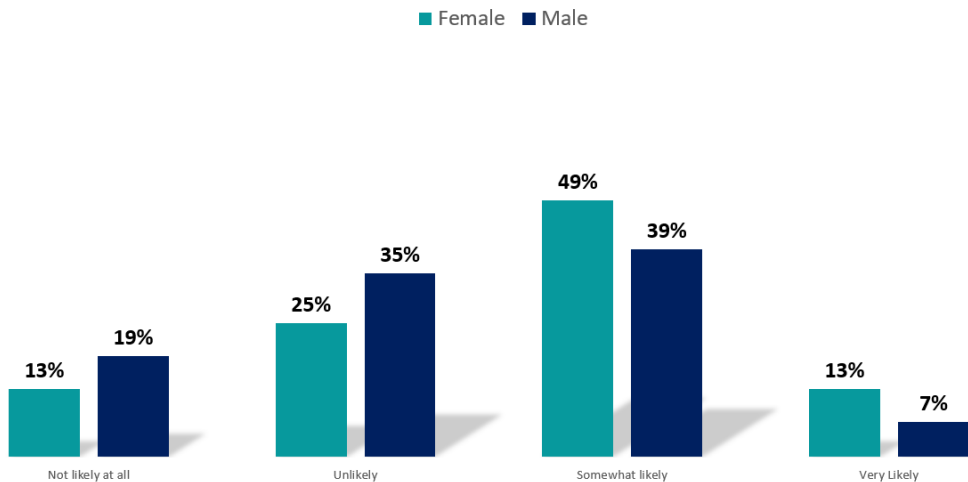


Students, especially females, prefer to view an item online first, then go to that retail store to make the purchase. Sixty-two percent of females are ‘somewhat likely’ or ‘very likely’ to make purchases in this manner.

How likely are you to look at items online then go to a store to make your purchase?

Female respondents = 232

Male respondents = 89



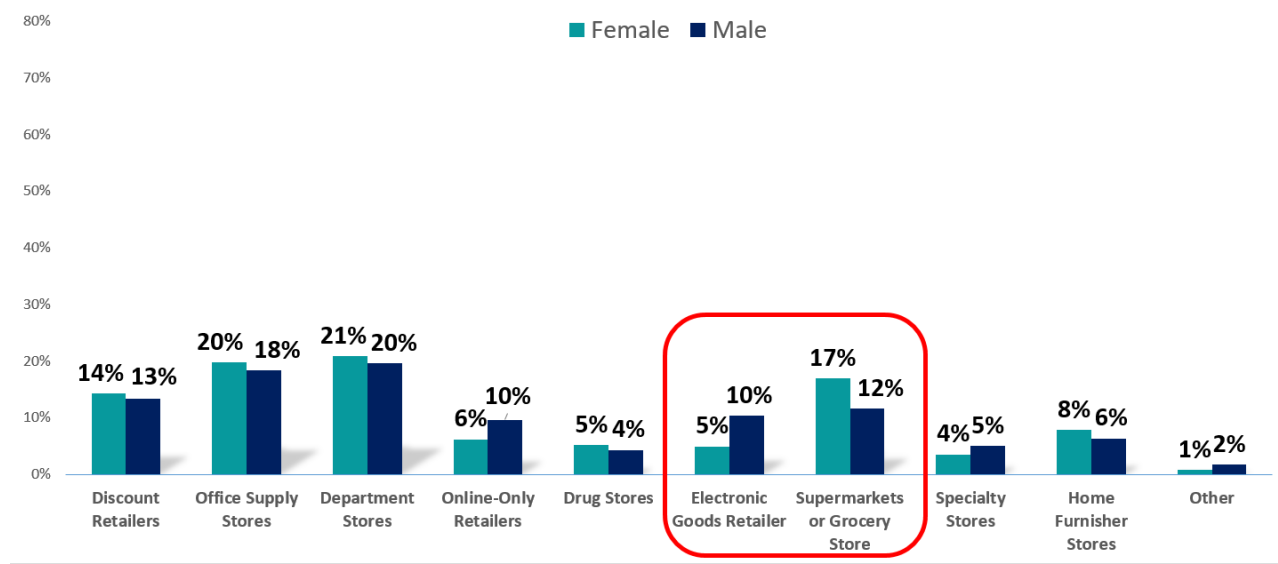
2018 College Back-to-School Student Survey

Trends & Statistics

Where Do Students Shop for BTS (cont.):

Students, both women and men have similar needs for their back-to-school shopping. Whether its office supplies (20% & 18%), clothing (21% & 20%), or drug stores (5% & 4%), they all need pens, shirts, and toothpaste for school. The only differences of gender purchasing decisions were grocery retailers (more women) and electronic retailers (more men).

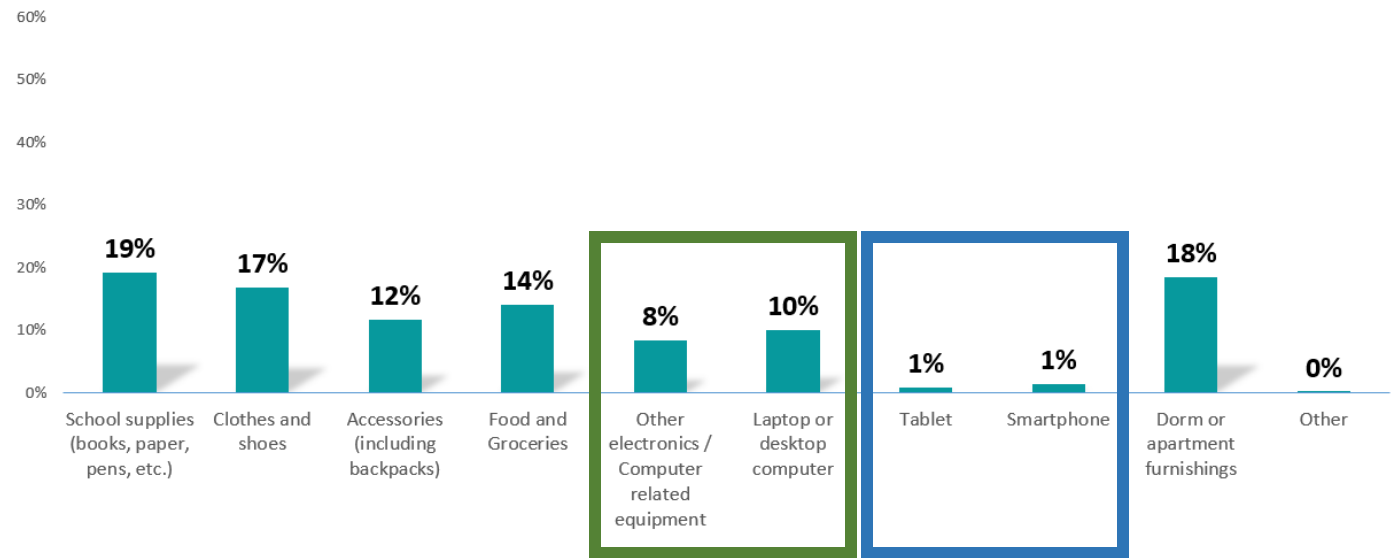
In what type(s) of stores will you be doing your back-to-school shopping (check all that apply)?



What are Students Purchasing:

The correlation between where students shop (graph above) compared to items purchased by students (graph below) closely aligns. What is interesting is the outlier of technology purchases. Eighteen percent of students either buy a computer or other electronics compared to only 2% of these students will purchase a tablet or smartphone.

What types of back-to-school items are on your shopping list this year (check all that apply)?



2018 College Back-to-School Student Survey

Trends & Statistics

Summary of Results:

- 1) Back-to-school spending has increased over the past year. Nearly half of the student respondents are planning on spending more money than they did in 2016 with 50% of the students spending more than \$500.
- 2) Brick and mortar stores still play a key role in the back-to-school purchase cycle. Ninety-four percent of students do at least half of their shopping in a physical store location. More than 50% also check out products online before going to the actual brick & mortar store to make the purchase.
- 3) Male and female students have different buying habits. Female students rely more on their parents to purchase their supplies (68% v. 54%). Additionally, females also shop more at supermarkets and grocery stores. Male students prefer shopping at online retailers as well as electronic goods retailers.
- 4) Students are procrastinators for back-to-school shopping. Seventy-five percent of all students start in August whereas almost 85% of male students use August as their start date.
- 5) Students love deals when shopping with 89% either liking “20% off discount” or “buy one get one free”.

About OnCampus:

OnCampus connects brands to college students where they live, study, work, and play. The student demographic represents one of the largest and most influential consumer groups in society. With 15 years of experience and an extensive portfolio of campus media, OnCampus addresses the broad marketing, recruiting, and advertising needs of a diverse client base at schools across the U.S. and Canada.

Contact Information:

OnCampus Advertising, LLC
164 Canal St., Suite 400
Boston, MA 02114

Email: info@oncampusadvertising.com
Phone: (888) 428-2737