College Student Media Consumption Survey

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ONCAMPUS ADVERTISING
Executive Summary

Survey Overview
OnCampus Advertising conducted a 16-question Media Consumption Survey at 25 large US universities between April 1 and May 31, 2016. The goal of the survey was to measure the habits and levels of engagement of college students with both campus-based media and non-campus-based media channels.

Key Findings
Students enjoy social media and internet music as their primary media format. Many students are willing to pay for subscription-based services, such as Netflix, hulu, Spotify Premium, etc. However, students are not likely to subscribe to cable or satellite TV, watch broadcast TV, or listen to broadcast radio.

Respondents engaged with the college newspapers and out-of-home displays, with 60% reporting they engage with college newspapers and 70% with OOH displays.

Students reported minimal engagement with traditional non-campus media formats, including broadcast television, radio and national newspapers and magazine.

Background
Methodology
OnCampus and its student newspaper partners ran a two-month advertising campaign on 25 college newspaper websites. Respondents who clicked on the banner display ad were directed to the online survey. Respondents were not compensated for completing the survey.

The survey garnered 309 responses, including 141 from college students, 77 from alumni, and 25 to 35 for each of faculty, alumni, parents and others.

Student Demographic
The results presented in the report that follows reflect survey results from college students only. The margin of error for the student-based responses is +/- 9% at a 95% confidence level, based on 141 student responses.

The make-up of students included the following breakdown by class year:

- Freshman: 38 (27.0%)
- Sophomore: 30 (21.3%)
- Junior: 43 (30.5%)
- Senior: 30 (21.3%)

Results
Student Spending Trends
College Student Media Consumption Survey
Spring 2016

Students spend the money largely at restaurants, bars and for groceries. Over 50% of students spend more than $100 per month on each of these items. The $100 per month level was only broached by 15% of students at other measured activities, including Entertainment, Transportation, Cell Phones, Media Subscriptions, and Clothing.

Media Consumption Across Popular Non-Campus Formats

Students reported that their favorite media formats are social media and internet music. Approximately 77% and 58% of students spent more than 2 hours a week with these two formats, respectively. Approximately 17% of students spend more than 10 hours a week on social media and 20% spent more than 10 hours a week on Internet radio. No other media format approached this level of engagement.

None of the other national media formats garnered much time or engagement from students. These formats included broadcast radio, live TV, national newspapers and print magazines. Notably, more than 55% of the students spent less than 1 hour per week with each of these media formats. Broadcast radio performed the worst, with 72% of students spending less than hour a week listening.

How much time per week do you spend with each of the following media formats?

<table>
<thead>
<tr>
<th>Media Format</th>
<th>None</th>
<th>Less than 1 hour</th>
<th>1-2 hours</th>
<th>2-5 hours</th>
<th>5-10 hours</th>
<th>10+ hours</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Newspapers</td>
<td>21</td>
<td>41</td>
<td>20</td>
<td>18</td>
<td>4</td>
<td>1</td>
<td>105</td>
</tr>
<tr>
<td>Print Magazines</td>
<td>41</td>
<td>32</td>
<td>25</td>
<td>4</td>
<td>2</td>
<td>0</td>
<td>104</td>
</tr>
<tr>
<td>Live TV</td>
<td>39</td>
<td>21</td>
<td>22</td>
<td>12</td>
<td>8</td>
<td>2</td>
<td>104</td>
</tr>
<tr>
<td>Netflix/Hulu/Etc.</td>
<td>10</td>
<td>14</td>
<td>15</td>
<td>27</td>
<td>28</td>
<td>9</td>
<td>103</td>
</tr>
<tr>
<td>Broadcast Radio</td>
<td>53</td>
<td>22</td>
<td>18</td>
<td>9</td>
<td>1</td>
<td>1</td>
<td>104</td>
</tr>
<tr>
<td>Internet Radio (Pandora, Spotify, iHeart Radio)</td>
<td>19</td>
<td>11</td>
<td>14</td>
<td>25</td>
<td>14</td>
<td>21</td>
<td>104</td>
</tr>
</tbody>
</table>
Media Consumption Across Popular Non-Campus Formats (cont.)

Paid subscriptions within certain categories are still popular, with 87% of student respondents subscribing to an online video streaming service (i.e Netflix, Hulu, etc). In addition, more than 67% of students subscribe to an internet radio like Spotify or Pandora. While these advanced media technology platforms have excelled in popularity, less than half of the students subscribe to cable or satellite TV and fewer than 25% subscribe to either a print magazine or newspaper subscription.

*Which media services do you subscribe to (check all that apply):*

Student respondents = 120
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Campus Media Consumption

When asked whether or not they notice campus media, respondents reported that they engage with campus-based media over 50% of the time.

- 60% notice college newspaper ads (both print and online versions),
- 57% notice bulletin board posters on campus
- 71% notice out-of-home advertising displays on campus

How often do you notice the advertising on the following campus media?
Student respondents = 90

<table>
<thead>
<tr>
<th></th>
<th>Never (0%)</th>
<th>Seldom (25%)</th>
<th>Somewhat (50%)</th>
<th>Often (75%)</th>
<th>Always (100%)</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>College newspaper - print version</td>
<td>19 (21.1%)</td>
<td>17 (18.9%)</td>
<td>19 (21.1%)</td>
<td>22 (24.4%)</td>
<td>13 (14.4%)</td>
<td>90</td>
</tr>
<tr>
<td>College newspaper - online version</td>
<td>19 (21.1%)</td>
<td>16 (17.8%)</td>
<td>23 (25.6%)</td>
<td>22 (24.4%)</td>
<td>10 (11.1%)</td>
<td>90</td>
</tr>
<tr>
<td>Outdoor ads on Campus - Bus Shelters, Billboards &amp; Kiosks</td>
<td>11 (12.2%)</td>
<td>15 (16.7%)</td>
<td>40 (44.4%)</td>
<td>19 (21.1%)</td>
<td>5  (5.6%)</td>
<td>90</td>
</tr>
<tr>
<td>Posters on Campus Bulletin Boards</td>
<td>13 (14.4%)</td>
<td>26 (28.9%)</td>
<td>26 (18.9%)</td>
<td>17 (8.9%)</td>
<td>8  (8.9%)</td>
<td>90</td>
</tr>
<tr>
<td>College Video Screens</td>
<td>31 (34.4%)</td>
<td>27 (30.0%)</td>
<td>17 (18.9%)</td>
<td>11 (12.2%)</td>
<td>4  (4.4%)</td>
<td>90</td>
</tr>
</tbody>
</table>

When asked about advertising through national media outlets, the highest ranking medium to capture student’s attention is Live TV, with 74% noticing ads at least 50% of the time. However, as previously noted, viewership is minimal with over 57% of students watching less than 1 hour a week of Live TV.
The college newspaper continues to be a popular medium with students. Of the student respondents, 53% had read their college newspaper in the past 7 days, with 64% having read a paper in the past 14 days. In addition, 56% of these students have read 3 or more of the past 5 editions.

When was the last time you read the print edition of the college newspaper?  
Student respondents = 130

How many of the last 5 print issues of your college newspaper have you read  
Student respondents = 109

College Newspaper Readership – Print Version (cont.)
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Spring 2016

Students spend a significant amount of time reading the print edition of their college newspaper, with 86% of students spending more than 5 minutes with each issue. Of these readers, nearly 28% spend more than 15 minutes per issue. Students cited Campus News and Opinion content as their favorite topics.

*How much time do you spend reading the print issue of your college newspaper?*
Student respondents = 108

![Pie chart showing time spent reading college newspaper]

*What content do you enjoy reading in your college newspaper (check all that apply)?*
Student respondents = 115

![Bar chart showing content preferences]

College Newspaper Readership – Online Version
College newspaper websites continue to grow in popularity, with 72% of students surveyed visiting their publication’s website at least once a week, and over 37% of respondents visiting daily. Of these students, 83% spend more than 5 minutes per week whereas over a third of respondents who visit daily spend more than 15 minutes per session.

**How often do you visit your college newspaper website?**
Student respondents = 120
Conclusions

The popularity of social media and the internet has not killed the advertising practices of the “old world,” rather, it has given them a new direction and livelihood. Word-of-mouth is no longer restricted to a small circle of friends with the introduction of social networking. Direct-to-fan advertising feels more personal than before with the opportunities to advertise on social platforms.

Campus media formats, including out-of-home displays, college newspapers and their websites, effectively engage students and provide reach throughout the student body. Student newspapers continue to be read by the majority of students. OOH displays on campus continue to provide wide-spread high frequency exposure. Using campus media conveys that the brand is speaking to students on their terms on their turf.