



Campus Case Study Slam

Know Your Target

Y-Pulse Conference
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Presenter: Dan Coates



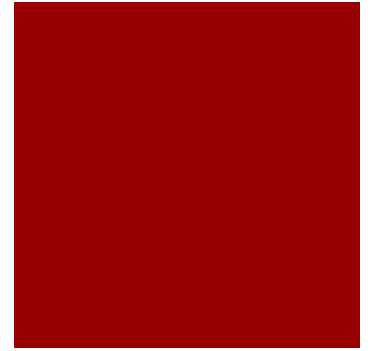
College Students - Fast Facts

- 20,450,833 current college students in the U.S.¹
 - 17,063,732 are undergrads
 - 3,387,101 are grad students
 - 40%+ of those aged 18-24 attend college²
 - 50%+ of high school grads attend college²
 - 70%+ of high school students intend to attend college
 - 58% are female / 42% are male¹
 - 76% attend public / 24% attend private institutions¹
- College students are more numerous than residents of any single state, except CA, TX & NY
- The average cost of a year of college education is \$14,000 for public inst. / \$32,000 for private inst.
- College Tuition / College Room & Board accounts for **\$333 trillion** in annual higher education spending

1. Source: U.S. Education Department
2. Source: U.S. Census Bureau



College Enrollment Projections



Source: U.S. Education department



Financial Force

- After rent & utilities are paid, non-college students have discretionary funds of 335.36 each or \$7.45 billion per month
- After school costs and accommodations are paid, college students have a monthly discretionary budget of \$327 each or \$5.95 billion per month
- Where does this \$160.8 billion in annual spending go?

Expenditure	Non-College	College	Expenditure	Non-College	College
Dining out	\$14.3	\$11.3	Trips / Holidays	\$4.0	\$3.5
Groceries	\$31.3	\$11.1	Alcohol	\$3.0	\$3.4
Gas / Transit	\$20.0	\$9.4	DVDs / CDs	\$3.5	\$2.1
Clothing	\$6.8	\$7.1	Movie Tickets	\$1.8	\$1.8
Shoes / Acc.	\$3.8	\$4.0	Video Games	\$2.4	\$1.5
Cell Phone	\$9.8	\$4.1	Movie / Music Downloads	\$0.5	\$0.6
Books	\$1.5	\$3.8	Magazines / Comics	\$0.8	\$0.6

(in billions)

Source: SurveyU Data



Technology Ownership



Technology	Non-College	College	Technology	Non-College	College
Mobile phone	86%	96%	LCD / Plasma TV	27%	29%
DVD Player	93%	89%	PVR / Tivo	32%	26%
High-Speed Internet	81%	87%	Digital Camcorder	31%	25%
iPod / Portable MP3	60%	87%	HDTV	16%	22%
Laptop Computer	54%	86%	PDA / Smartphone	16%	17%
Digital Camera	78%	78%	Satellite Cable	21%	16%
Video Game Console	74%	58%	Satellite Radio	12%	10%
Desktop Computer	85%	55%	VOIP	9%	7%
Digital Cable	47%	51%	E-Book Reader	3%	2%
Portable Video Game	43%	32%			

(in billions)

Source: SurveyU Data



Media Consumption



Medium / Activity	Non-College	College		Non-College	College
Internet	28	37	Television	15	11
Communicating	8.2	10.1	Antenna / cable / sat	12.9	9.1
Studying / Working	4.5	9.3	Downloaded TV	.87	1.1
Personal Sites (facebook, flickr, etc.)	6.7	9.1	Streaming video	1.1	1.2
News / Entertainment	8.2	8.6	Print	3	4
Radio (Total)	7	4	Magazines	1.5	1.1
Traditional radio	5.1	2.6	Campus Newspaper	N/A	.98
Online radio	1.3	1.1	Local Newspapers	.92	.81
Satellite radio	1.0	.45	National Newspapers	.43	.68



(hours spent weekly)

Source: SurveyU Data

Dominant Values Among Collegians

■ Males – Highest Agreement

- 1 Being loyal to your friends
- 2 Keeping your word
- 3 Working hard
- 4 Standing up for yourself
- 5 Getting formally educated
- 6 Developing new skills
- 7 Having a lifelong career
- 8 Showing courtesy to others
- 9 Accepting responsibility for your actions
- 10 Planning for your financial future

■ Females – Highest Agreement

- 1 Being loyal to your friends
- 2 Getting formally educated
- 3 Keeping your word
- 4 Working hard
- 5 Standing up for yourself
- 6 Having a lifelong career
- 7 Having strong family ties
- 8 Showing courtesy to others
- 9 Accepting responsibility for your actions
- 10 Planning for your financial future

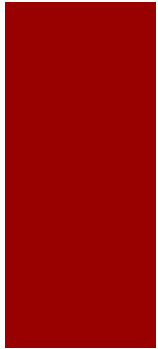
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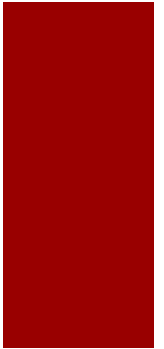
Recessive Values Among Collegians

■ Males – Lowest Agreement

- 41 Doing things that your friends don't do
- 42 Finding your own religion / defining your own spirituality
- 43 Owning lots of stuff
- 44 Going to church / synagogue / mosque, etc
- 45 Being known for the friends you hang out with
- 46 Being popular
- 47 Risking life and limb
- 48 Being really famous
- 49 Getting drunk
- 50 Getting high / stoned

■ Females – Lowest Agreement

- 41 Being really rich
- 42 Starting your own business
- 43 Getting an adrenaline buzz
- 44 Owning lots of stuff
- 45 Being known for the friends you hang out with
- 46 Being popular
- 47 Risking life and limb
- 48 Being really famous
- 49 Getting drunk
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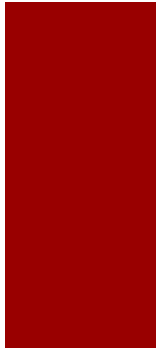
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Shifts in Opinion – Gaining Ground

■ Males

- 1 Being patriotic (+7%)
- 2 Having respect for the law (+7%)
- 3 Working hard (+6%)
- 4 Planning for your financial future (+5%)
- 5 Protecting your privacy (+5%)
- 6 Risking life and limb (+4%)
- 7 New technology (+4%)
- 8 Being informed about current events (+4%)
- 9 Being street-smart (+4%)
- 10 Having a lifelong career (+4%)

■ Females

- 1 Being patriotic (+10%)
- 2 Having respect for the law (+6%)
- 3 Having kids (+5%)
- 4 Planning for your financial future (+5%)
- 5 Protecting your privacy (+5%)
- 6 Resisting temptation (+5%)
- 7 Having a lifelong career (+4%)
- 8 Starting your own business (+4%)
- 9 Risking life and limb (+4%)
- 10 Going to church (+4%)

Shifts in Opinion – Losing Ground

■ Males

- 41 Doing things that your friends don't do (-1%)
- 42 Having kids (-1%)
- 43 Being stylish (-1%)
- 44 Getting married (-1%)

- 45 Being known for the friends you hang out with (-2%)
- 46 Going to church / synagogue / mosque, etc (-3%)
- 47 Being really famous (-3%)
- 48 Getting drunk (-3%)
- 49 Finding your own religion / defining your own spirituality (-4%)
- 50 Being popular (-5%)

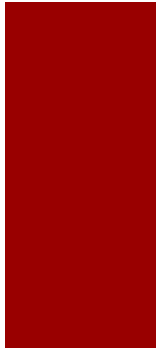
■ Females

- 41 Having sex (-2%)
- 42 Being really rich (-2%)
- 43 Being stylish (-3%)
- 44 Being known for the friends you hang out with (-3%)
- 45 Owning lots of stuff (-4%)

- 46 Getting an adrenaline buzz (-6%)

- 47 Being really famous (-7%)
- 48 Being popular (-9%)
- 49 Getting high / stoned (-10%)

- 50 Getting drunk (-16%)



The Least You Should Remember



1. Millennials are citizens of the **global village** (Multi-cultural / Multi-racial / Multi-lingual)
2. Millennials are jacked up **on technology** (Multi-taskers / Multi-media)
3. Use **mass media** for **awareness**, **grassroots** and online for **engagement**.
4. This generation **values authenticity** and can smell BS from a mile away. You need to communicate with clarity and sincerity.
5. Millennials are **numerous** and have great **power** as a generation - it will pay dividends to understand the largest generation in American history

Not a Destination ... A Journey



- Today we'll be passengers on the journeys already undertaken by:
 - CMG / State Farm
 - Disney / ABC Family
 - GMU
 - Alloy / Pentel
 - Youth Marketing Connection / Rockstar
 - Myspace / Aptimus / UPhoenix
 - MTVU

- While fortune favors the well prepared, the single greatest cause of failure is complacency