

STUDENT MONITOR®



Converting data to insight

COMPUTING & THE INTERNET - Fall 2016

STUDENT MONITOR LLC

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INTRODUCTION

This study is based on interviewing conducted during the week of October 12th, 2016. The study explores the wide range of college students' activities and interests, and is intended to help all college and young adult oriented marketers and advertisers better understand the full-time, Four Year college student market.

Four STUDENT MONITOR[®] studies are issued each year: in addition to the 2 LIFESTYLE & MEDIA studies (1 each Spring and 1 each Fall), there are 2, in-depth, industry-specific studies (COMPUTING & THE INTERNET and FINANCIAL SERVICES). Comments or suggestions from subscribers are welcome.

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We are available at any time to discuss study details or respond to questions. Please do not hesitate to call us. Thank you and welcome to STUDENT MONITOR[®].



Executive Summary 7

Methodology 15

Chapter 1 - Computer Attitudes & Experience

Chapter Overview 16

Top Of Mind Brands, Technology 17

Top Of Mind Brands, Wearable Technology..... 18

Agreement With Statements About Technology..... 19

Who Makes The Best Desktop? 20

Who Makes The Best Laptop?..... 22

Who Makes The Best Tablet? 24

Quality/Reliability & Value Ratings 25

Quality/Reliability Ratings..... 26

Value Ratings..... 27

Preferred Combination Of Devices To Meet College Needs..... 28

Chapter 2 - Computer Ownership & Purchase Behavior

Chapter Overview 29

Computer Ownership..... 31

Computer & Tablets Purchased In The Past Few Months 33

Purchased Or Upgraded To A New Smartphone In The Past Few Months 34

Computer, Tablet Or Smartphone Received As a Gift In The Past Few Months 35

Brand Of Desktop, Laptop Or Tablet Purchased In The Past Few Months..... 36

Brand Of Desktop, Laptop Or Tablet Received As A Gift In The Past Few Months..... 37

Brand Of Desktop Purchased In The Past Few Months 38

Brand Of Desktop Received As A Gift In The Past Few Months 39

Brand Of Laptop Purchased In The Past Few Months 40

Brand Of Laptop Received As A Gift In The Past Few Months 41

Brand Of Full Size Tablet Purchased In The Past Few Months 42

Brand Of Full Size Tablet Received As A Gift In The Past Few Months 43

Brand Of Small Tablet Purchased In The Past Few Months 44

Brand Of Small Tablet Received As A Gift In The Past Few Months 45

Brand Of Smartphone Purchased Or Upgraded To In The Past Few Months..... 46

Brand Of Smartphone Received As A Gift In The Past Few Months 47

Brand Of Desktop Owned..... 48

Brand Of Laptop Owned..... 49

Brand Of Full Size Tablet Owned.....	50
Brand Of Small Tablet Owned.....	51
Type Of Computer Used Most Often.....	52
Brand Of Computer Used Most Often.....	53
Brand Of Desktop Used Most Often.....	54
Brand Of Laptop Used Most Often.....	55
Brand Of Full Size Tablet Used Most Often.....	56
Brand Of Small Tablet Used Most Often.....	57
Type Of Last Computer Or Tablet Replaced.....	58
Computer Acquisition.....	59
Student Input On Computer Purchase Decision.....	61
Important Factors Influencing Purchase Decision.....	62
When Computer Used Most Often Was Acquired.....	64
Month Computer Used Most Often Was Acquired.....	65
Cost Of Computer Used Most Often.....	67
Computer Purchased In A Store Or Online.....	68
Type Of Store Where Computer Was Purchased.....	69
Where Online Computer Was Purchased.....	70
Operating System Used.....	71
Likelihood Of Upgrading To Windows 10 In The Next 6 Months.....	72
Upgraded OS In The Past 6 Months.....	73
OS Upgraded To.....	74
Acquired OS Upgrade From School.....	75
Plan To Upgrade OS In Next 6 Months.....	76
OS Will Upgrade To.....	77
Plan To Purchase A Computer In The Next 12 Months.....	78
Type Of Computer Plan To Purchase.....	79
Brand of Desktop Plan To Purchase.....	80
Brand Of Laptop Plan To Purchase.....	81
Brand Tracking Summary.....	83
Dell.....	84
HP.....	85
Apple.....	86

Chapter 3 – Wireless Speakers & Headphones

Chapter Overview.....	87
Wireless Speaker/Headphones Ownership.....	88
Wireless Speaker/Headphone Plan To Purchase In Next 6 Months.....	89

Chapter 4 – Software

Chapter Overview.....	90
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Software Used.....	91
Methods Of Software Acquisition	93
Incidence & Perceived Incidence Of Downloading Unlicensed Software.....	95
Attitude About Software Copying.....	96

Chapter 5 - Computing On Campus

Chapter Overview	97
Frequency Of Using School-Owned Computers	98
Availability Of School Provided Technical Support	99

Chapter 6 - The Internet

Chapter Overview	100
Hours Per Week Spent Online	101
Method Used Most Often To Go Online.....	102
eMail Addresses Students Use	103
eMail Address Used Most Often	104
Browsers Used In The Past 6 Months.....	105
Browser Used Most Often	106
Search Engines Used In The Past 6 Months.....	107
Search Engine Used Most Often.....	108
Past Month Online Activities.....	109
Most Common Digital Activities	114
Activities Using A Computer, Tablet Or Smartphone In A Typical Week	116
Files Downloaded/Streamed From File Sharing Sites This Term	120
Frequency Going Online For Sports News & Information	121
Sites Visited For Sports News & Information	122
Sites Visited Since Start Of Fall 2016 Term	124
Time Spent With Social Networks In A Typical Week	131
Photo Sharing Sites Used In The Past Month.....	133
Frequency Of Using Skype.....	134
Frequency Of Using Apple Message	135
Frequency Of Using Facetime	136
Frequency Of Using Google + Hangouts	137
Frequency Of Making Online Purchases.....	138
Past Year Online Purchases.....	139
Influences To Buy Or Rent A Textbook Online.....	140
Music-Related Sites Visited This Term	141
Music-Related Sites Where Free Music Was Downloaded This Term	142
Music-Related Sites Where Paid Music Was Downloaded This Term	143

Chapter 7 – Demographics

Chapter Overview	144
Age.....	145
Life Experiences	146
Siblings In College.....	147
Residency During School Year.....	148
Permanent Home Located In Same State As School Attended.....	149
Distance From Permanent Home To School.....	150
Current Employment Status	151
Hours Currently Working While at School	152
Annual Earnings.....	154
Funds Received From Home Each Month	155
Students' Monthly Discretionary Spending	156
Family's Estimated Annual Income.....	157
Major Course of Study.....	158
Number Of Times Have Changed Major	159
GPA	160
Ethnic Background.....	161

Interview Questionnaire

Data Tables



EXECUTIVE SUMMARY

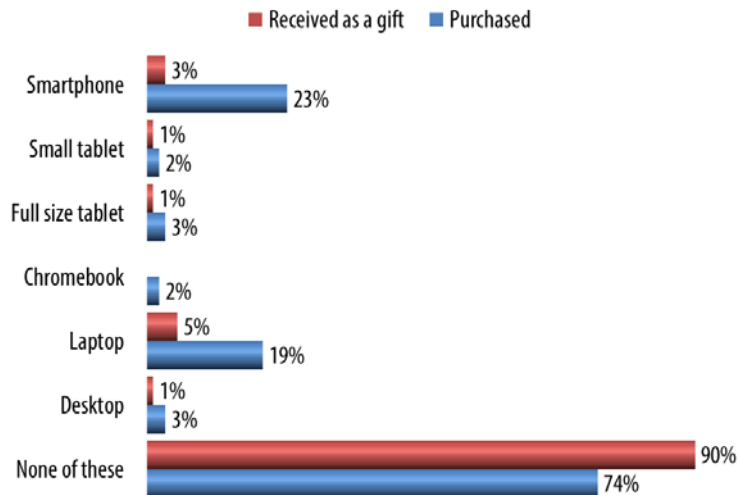
The annual STUDENT MONITOR® COMPUTING & THE INTERNET study explores issues of importance to manufacturers and marketers of computer hardware and software, as well as, Internet oriented companies.

KEY FINDINGS

The student market continues to be a key, consumer segment for computer manufacturers . . .

- 94% own a personal computer or tablet (desktop, laptop, full size or small tablet or Chromebook)
- 87% of all students own a laptop, 17% own a full size tablet, 17% a desktop, 14% a small tablet and 3% a Chromebook
- During the "Back To School" shopping period, 26% purchased/upgraded to or received as a gift a Smartphone, 24% a laptop, 4% a full size tablet, 4% a desktop, 3% a small tablet and 2% a Chromebook

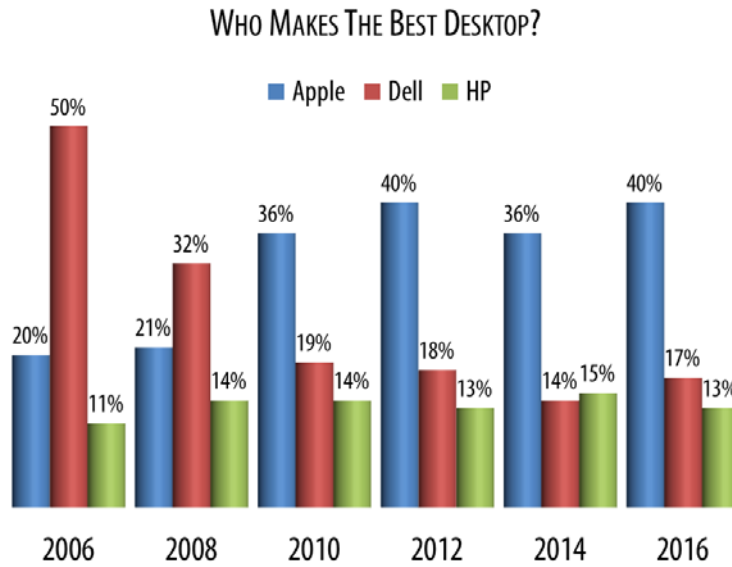
PERSONALLY PURCHASED OR RECEIVED AS A GIFT SINCE JUNE



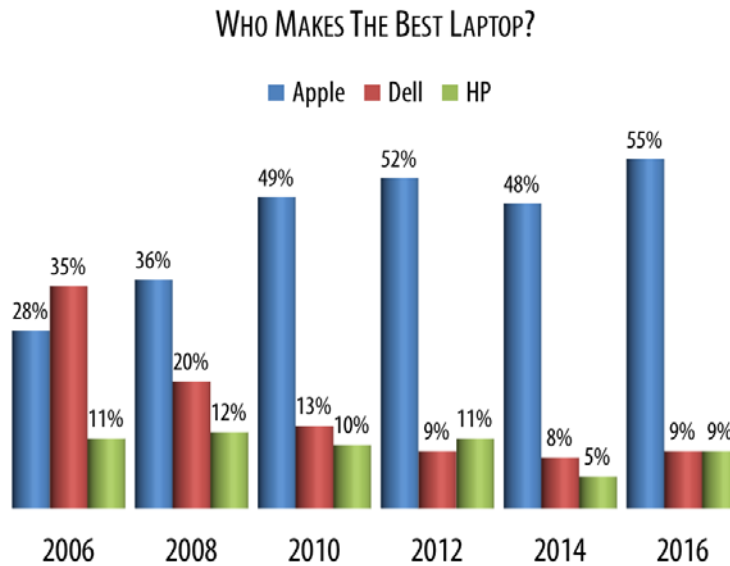
- 8% plan to purchase a new computer in the next 12 months
- Among purchase intenders, 84% plan to purchase a laptop, 13% a full size tablet, 9% a desktop, 3% a small tablet and 1% a Chromebook

Apple tops student perception as the best desktop, best laptop, and best tablet . . .

- By a wide margin, students believe **Apple** makes the “best desktop”



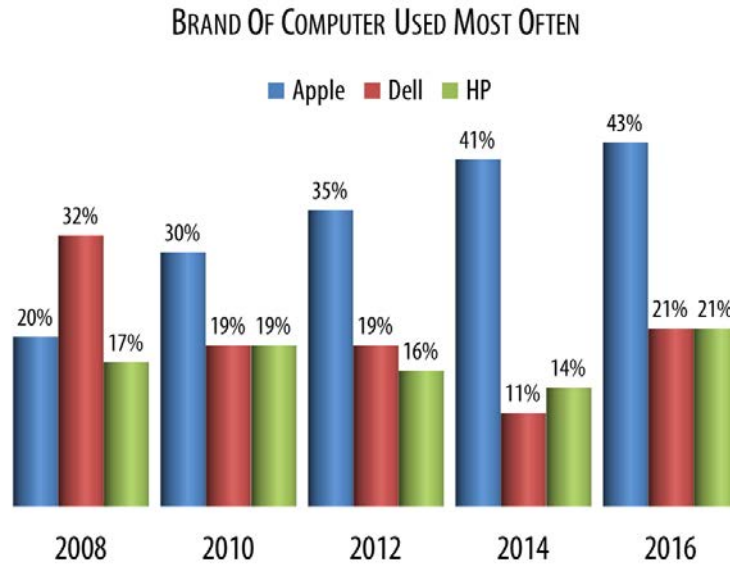
- By an even wider margin, students believe **Apple** makes the “best laptop”



- Apple leads all brands on the basis of quality/reliability and value and is often rated higher among owners of competitive brands than the brand they own . . .

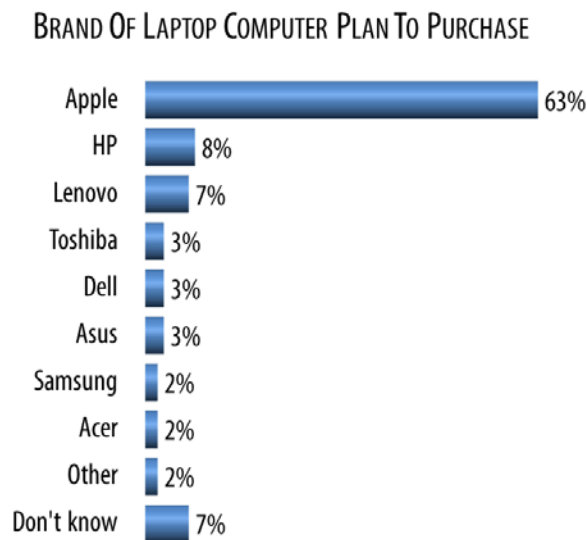
Quality/Reliability & Value Ratings			
(Base = All Students)			
	"Quality/Reliability"	"Value"	TOTAL
Apple	8.2	7.8	16.0
HP	7.3	7.3	14.6
Samsung	7.0	7.2	14.2
DELL	6.6	6.9	13.5

- Dell's share of student owned computers used most often has declined (from 32% in 2008 to 21% in 2016) while Apple's share has sharply increased (from 20% in 2008 to 43% in 2016). HP is comparatively unchanged



... as does purchase intent for Apple ...

- 63% of laptop purchase intenders plan to purchase an Apple laptop inclusive of those who "Don't know" what brand of desktop or laptop they plan to purchase



Software....

- 53% use a Windows OS while 32% use Mac OS, including the 12% who "Don't know" their computer's OS
- 42% have upgraded their OS in the past 6 months (14% of upgraders acquired their upgrade from their school)
- 28% plan to upgrade their OS in the next 6 months (35% of upgraders will upgrade to Mac Sierra and 25% will upgrade to Windows 10 including the 24% who "Don't know" what OS they will upgrade to)
- MS Word (68%) remains the leading software application used by student computer owners

- The incidence of "acquiring software from friends and family" (software piracy) is 6%, representing a 10 year low
- 56% (up from 50% last year) approve of the practice of copying of unlicensed software stating "OK, I'm in favor of it" or "It's acceptable because everyone does it"
- The perceived incidence of using unlicensed software (58%) continues to be far greater than the actual reported incidence (6%)

The Internet is a continually expanding component of student lifestyle . . .

- Google's Gmail (50%) is the email students' use most often. 29% of students forward their school emails to a personal email.
- 85% of students spend time with **Facebook** in a typical week, spending an average of 5.6 hours weekly. 81% spend an average of 5.2 hours with **Snapchat** and 77% spend an average of 5.4 hours weekly with **YouTube**
- 95% used a photo-sharing site in the past month (**Facebook** is mentioned by 74% followed by **Instagram** at 68% and **Snapchat** at 65%)
- Students spend an average of 20 hours online weekly (25% more than last year's 16 hours weekly finding)
- Google Chrome (65%, up from 54% last year) is the browser students' use most often (20% mention Safari, 6% Firefox and 6% mention IE)
- Google (94%, up significantly from 77% last year) is the search engine students' use most often (2% mention Bing, 2% Yahoo! Search and 1% Ask)
- In a typical week, 52% use **Apple Messages**, 35% use **FaceTime**, 9% use **Skype**, and 9% use **Google + Hangouts**
- Students report being most likely to have downloaded/streamed "**unlicensed movies**" (17% incidence and a user mean of 6.6 movies downloaded/streamed) from a file sharing site in the past month
- Students are least likely to have downloaded/streamed "**unlicensed eBooks (not for class)**" (4% incidence and a user mean of 3.9 books downloaded/streamed)

Files Downloaded/Streamed From File Sharing Sites This Term			
(Base = All Students)			
	Total %	Male %	Female %
Unlicensed movies	17	22	13
Mean number downloaded/streamed	6.6	5.3	8.5
Unlicensed music	15	18	13
Mean number downloaded/streamed	12.7	10.1	16.6
Unlicensed eBooks	8	12	4
Mean number downloaded	2.3	2.1	2.8

Files Downloaded/Streamed From File Sharing Sites This Term			
(Base = All Students)			
	Total %	Male %	Female %
Unlicensed TV shows	12	16	8
Mean number downloaded/streamed	7.1	5.9	9.7
Unlicensed eBooks (not for class)	4	5	3
Mean number downloaded	3.9	3.5	4.6

Students continue to rely on the Internet for school-related tasks . . .

School-Related Past Month Internet Experiences							
(Base = All Students)							
	F10 %	F11 %	F12 %	F13 %	F14 %	F15 %	F16 %
Check grades	73	79	74	59	74	66	78
Complete a class assignment	59	66	59	50	62	51	66
Research for school assignment	47	44	48	39	39	36	45
Get help with homework/research question	47	49	46	36	40	36	37
Visit school's site	52	57	47	32	38	33	44

. . . and as consumers

- 62% made an online purchase in the past year
- Students report \$4.2 billion in online spending for 10 spending categories
- Online spending for **Textbooks** (Printed and eTextbooks, \$984 million), **Travel/airline tickets** (\$827 million) and **Apparel** (\$663 million) lead all other categories

Past Year Online Purchases			
(Base = All Students)			
Category	Purchasers	User mean	Extension
Apparel	41%	\$200	\$662,721,893
Printed textbooks	31%	\$298	\$747,644,970
Concert/sports tickets	29%	\$209	\$482,802,367
Footwear	27%	\$185	\$394,082,840
Books (not textbooks)	25%	\$147	\$296,435,503
eTextbooks	18%	\$164	\$236,004,734
Travel/airline tickets	18%	\$560	\$827,076,923
Food	17%	\$227	\$311,621,302
Downloadable music	16%	\$53	\$67,237,870
Kitchen, bed, bath	14%	\$134	\$145,893,491

Top Web Site . . .

- **Amazon** (65%) was the most commonly visited website this term, followed by **YouTube** (51%) and **Apple** (31%)
- 55% (70% of males and 40% of females) use the Internet to get sports news and information. **ESPN, NFL, BleacherReport, NBA** and **FoxSports** are the most commonly mentioned sites
- **Spotify** (48%), **Pandora** (43%) and **Soundcloud** (25%) are the Top Three Music-Related Web Sites visited by students this past term

Music-Related Web Sites Visited This Term					
(Base = All Students)					
	F12	F13	F14	F15	F16
	%	%	%	%	%
Spotify	N/A	18	34	29	48
Pandora	N/A	N/A	N/A	37	43
Soundcloud	N/A	N/A	N/A	15	25
Apple Music	N/A	N/A	N/A	8	23
Apple iTunes Music Store	39	29	30	18	21
Amazon	35	29	26	15	19
GooglePlay	N/A	N/A	N/A	11	9
Tidal	N/A	N/A	N/A	N/A	9
MTV	6	4	4	6	5
eBay	13	8	6	6	4
Yahoo	13	10	9	6	3
VH1	1	3	2	3	2
MTV2	1	1	1	2	1

Computing on campus . . .

- 77% use school-owned computers
- 32% "Don't know" if school provided, software or hardware technical support is available to them

Demographics

- Average age is 20.6 (58% are younger than 21)
- 14% are first in their family to attend college, 10% previously attended a Two Year Community College, 4% are returning to college for a second time, 1% were in the military (not ROTC), 2% are or were enrolled in ROTC, 2% are married, 5% have 1 or more children
- 30% have 1 or more siblings currently enrolled in a Four Year school and 13% have a sibling currently enrolled in a Two Year school
- 34% live on campus, 45% off campus and the remaining 21% live at home and commute to school each day
- 75% attend a school in the same state as their permanent home (average student lives 172 miles from their permanent home)
- 6% are employed full-time, 45% part-time and 5% have a full or part-time internship
- Students employed full-time work an average of 35 hours weekly compared to 19 hours for those employed part-time (less for internships)
- Annual personal earnings average \$5,826
- 57% get money from home averaging \$335 monthly
- Monthly discretionary spending averages \$170
- Family HH income averages \$116,000
- "Business" is the most common major (16%), 38% have changed their major at least once and the average GPA is 3.3

What follows this Executive Summary is a detailed summary of the findings of this study. The report presents results and explores the implications for readers. There are 7 chapters;

- Chapter 1 - Computer Attitudes & Experience
- Chapter 2 - Computer Ownership & Purchase Behavior
- Chapter 3 - Wireless Speakers & Headphones
- Chapter 4 - Software
- Chapter 5 - Computing on Campus
- Chapter 6 - The Internet
- Chapter 7 - Demographics

A copy of the survey questionnaire is provided following the detailed findings of this study.

Subscribers are urged to review our findings and participate in on-site presentations. The research team welcomes your feedback, whether in terms of alternative interpretations of results, new question areas or other ways we can make STUDENT MONITOR work harder for you.

Welcome to STUDENT MONITOR® Fall 2016 COMPUTING & THE INTERNET.



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