STUDENT MONITOR®

Converting data to insight

COMPUTING & THE INTERNET - Fall 2020

STUDENT MONITOR LLC
550 North Maple Ave., Ridgewood, NJ 07450 (201) 612-8100 www.studentmonitor.com

INTRODUCTION

This study is based on campus, one-on-one interviewing conducted during the two week period beginning October 12th, 2020. 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 market.

Four STUDENT MONITOR studies are issued each year; in addition to the two LIFESTYLE & MEDIA studies (each Spring and each Fall), there are two, in-depth, industry-specific studies (COMPUTING & THE INTERNET and FINANCIAL SERVICES).

These studies are intended for the private and sole use of STUDENT MONITOR subscribers only. The analyses and tabulations may not be reproduced in whole or in part without the permission of STUDENT MONITOR, LLC. Subscribers may extract relevant findings and analyses as needed for their internal use. Subscribers are required to contact STUDENT MONITOR prior to any public use, publication or broadcast of STUDENT MONITOR data or analyses.

Subscriptions to STUDENT MONITOR are available on an individual study basis or for the entire portfolio of studies. The studies and datasets are provided in a digital format.

Subscribers are encouraged to provide detailed feedback on question areas and other aspects of the entire program. Subscribers may also embed proprietary questions in any study. These Proprietary questions are available on a limited basis. Pricing for these questions depends on their complexity. Proprietary analyses and cross-tabulations of STUDENT MONITOR data are also available. In-person presentations of study findings and analyses of business implications by STUDENT MONITOR management are included in each subscription at no added cost.

The STUDENT MONITOR management team can be reached by telephone at (201) 612-8100, or you may e-mail, question@studentmonitor.com. The STUDENT MONITOR website is www.studentmonitor.com. We are available at any time to discuss study details or respond to any questions you may have. Please don't hesitate to call us. Thank you and welcome to STUDENT MONITOR!

Computing & The Internet

CONTENTS

Chapter 6 - The Internet

Chapter 7 – Demographics

EXECUTIVE SUMMARY

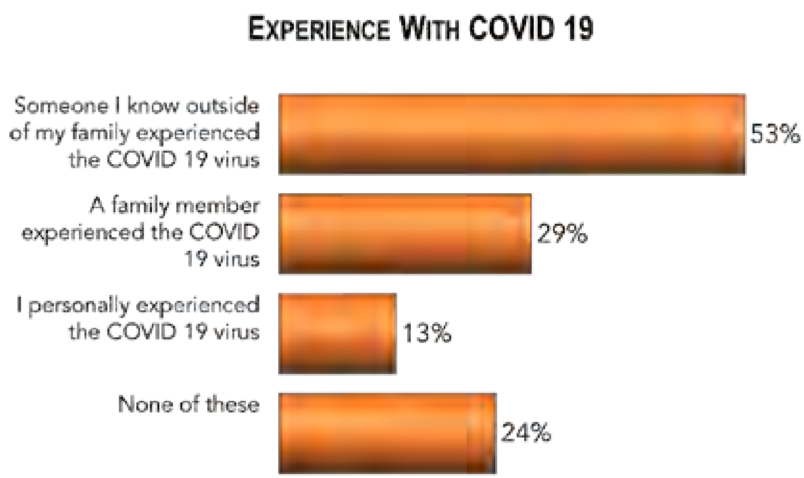
The annual STUDENT MONITOR® COMPUTING & THE INTERNET study explores issues of importance to manufacturers and marketers of computer hardware and software, as well as, Internet oriented companies.

BACKGROUND

When comparing last year's findings to some of the significant changes seen this year, we attribute many of those changes to the impact of COVID 19.

The COVID 19 pandemic represents the most significant disruptor to higher education ever seen since the Spring of 1997, 23 years ago, when the very first edition of STUDENT MONITOR® was published.

Specifically, the COVID 19 pandemic has unprecedently changed where students learn, how they learn, their perception of their college and university and their lives and lifestyles resulting from their respective learning experiences. These changes have clearly had an impact on student ownership and use technology.



- Only 19% of students enrolled in the Fall 2020 term are attending classes on campus, 35% are full remote learners and 45% are both on campus and remote learners

- 49% of on campus learners considered not returning to campus for the Fall 2020 term

- Among full or partial remote learners, only 43% are at least **"Somewhat satisfied"** with remote learning

Satisfaction With Remote Learning

- Among on campus learners, 87% agree **"The social aspect of traditional on campus classroom learning is very important to me"**

- Among on campus learners, 82% agree **"My school has a system of programs in place to protect students from the COVID 19 virus"** and 72% agree **"My peers could be more conscientious about following my school's programs and policies to protect myself and other from the COVID 19 virus"**

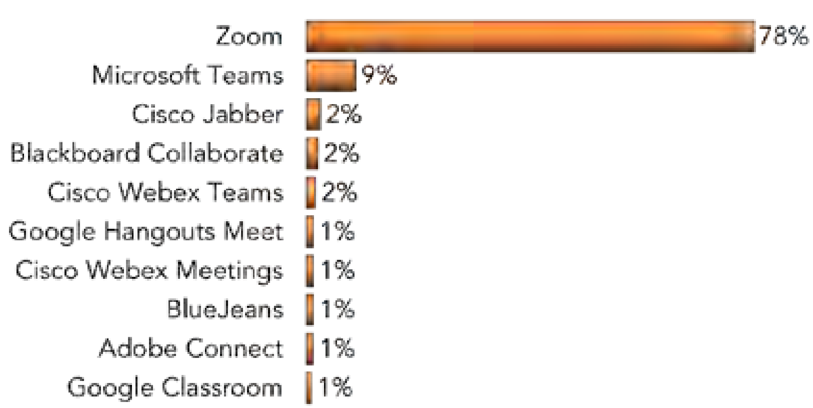
- Among full partial remote learners, 66% agree **"I'm not receiving the same value with remote learning"**

- Among full and partial remote learners taking a science class this term, 46% are using 1 or more virtual labs tools (62% believe the virtual lab tool is not realistic, 52% rate the experience as not positive)

- By a wide margin, **Zoom** (87%) is the most commonly used app for remote learning, followed by **Microsoft Teams** (19%)

- By an even wider margin, **Zoom**, 78%, is the one app used most commonly for remote learning followed by **Microsoft Teams** (9%)

Apps Used Most Often For Remote Learning



- 72% of remote learners are satisfied with the one app they use most often

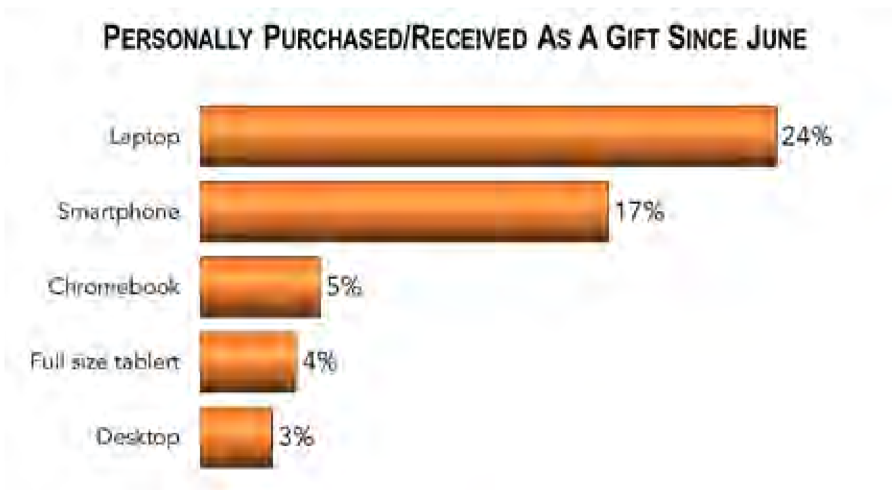
KEY FINDINGS

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

- 99%, up from last year's 95%, own a desktop, laptop, full size or small tablet or Chromebook

- 89% of all students own a laptop, 12% a full size tablet, 11% a small tablet, 9% a desktop, and 7% a Chromebook

- During the **Back To School** shopping period, 24% purchased/upgraded to or received as a gift a laptop,17% a Smartphone, 5% a Chromebook, 4% a full size tablet, 3% a desktop, and 0% a small tablet

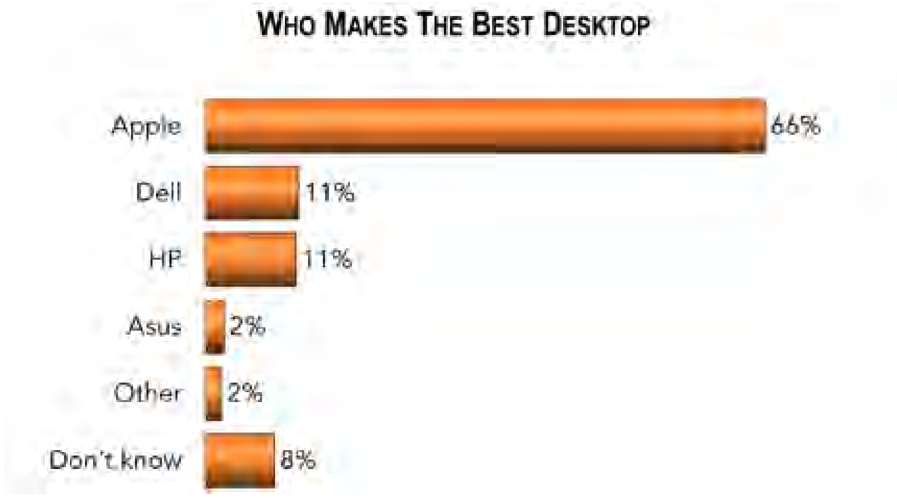


- 4%, down from 8% last year, plan to purchase a new desktop, laptop, tablet or Chromebook in the next 12 months (30%, up from 21% "Don't know")

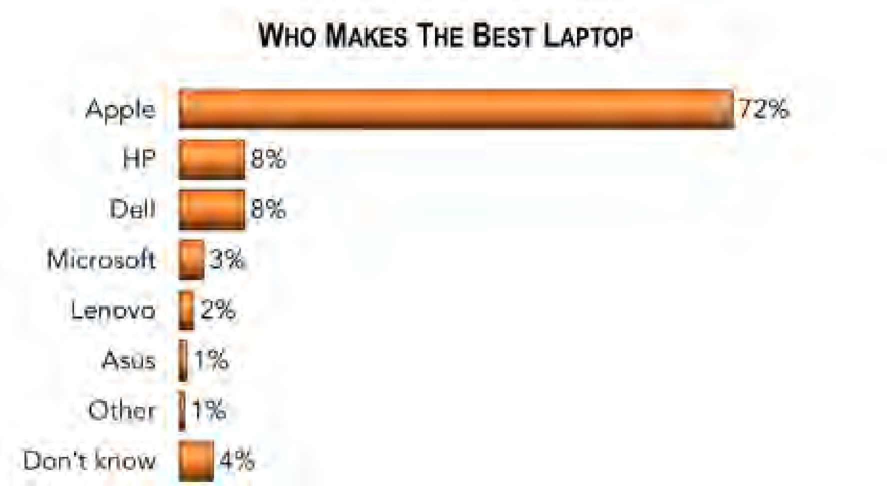
- Among purchase intenders, 64% plan to purchase a laptop, 21% a full size tablet, 14% a desktop, 7% a Chromebook and 0% a small tablet

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

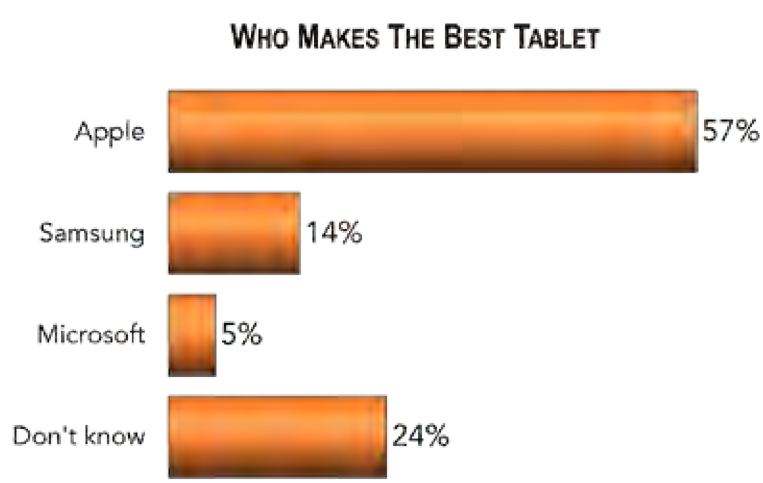
- By a wide margin, students believe **Apple** makes the **best desktop**



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



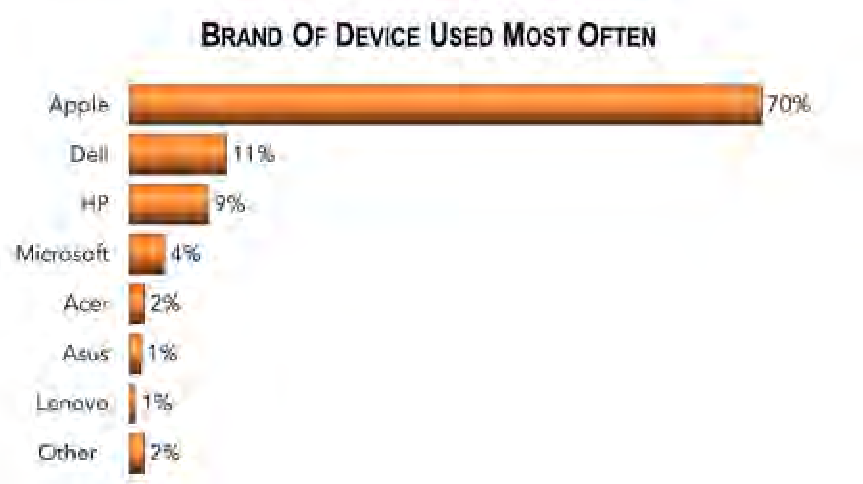
- 57% of students believe **Apple** makes the **best tablet**



- **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 . .

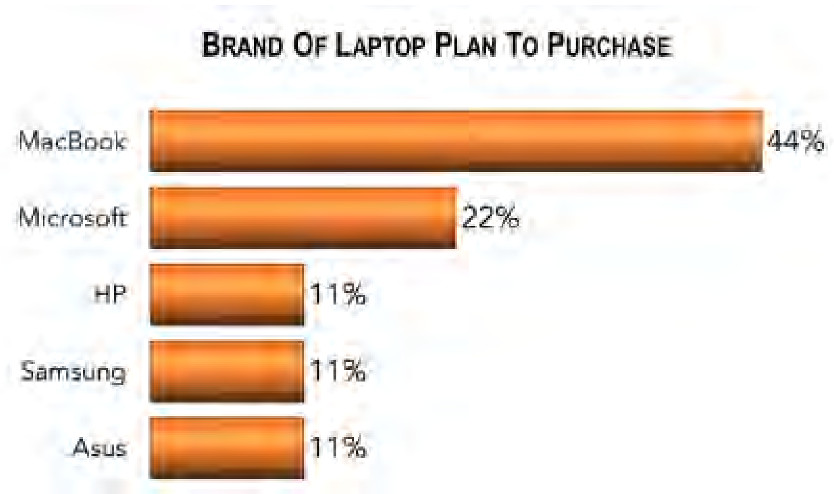
Quality/Reliability & Value Ratings Base = All Students			
	"Quality/ Reliability"	"Value"	Total
Apple	**8.8**	**8.6**	**17.4**
HP	7.6	7.5	15.1
Samsung	7.5	7.6	15.1
Dell	7.0	7.3	14.3

- **Apple's** share of student owned computers used most often has increased from 33% in 2011 to 70% this year while **Dell's** share has declined from 19% in 2007 to 11% in this year. At 9%, **HP** has declined sharply from 19% last year



. . . as does purchase intent for Apple

- 44% of laptop purchase intenders plan to purchase an **Apple** laptop



OS & Software….

- 30% use a **Windows OS** while 40% use **Mac OS**, including the 26% who **Don't know** their computer's OS

- 18% have upgraded their OS in the past 6 months and 7% of upgraders acquired their upgrade from their school

- 8%, down from 21% last year, plan to upgrade their OS in the next 6 months

- 16% will upgrade to **Windows 10**, 8% **Mac Big Sur** and 12% **Mac Sierra**, **Mac High Sierra** or **Mac Yosemite** including the 40% who **Don't know** what OS they will upgrade to

- **Apple iTunes**, 76%, is the leading application used by student computer owners

- 5%, down somewhat from 8% last year, have downloaded unlicensed software in the past year

- 52%, up somewhat from last year's 48%, approve of the practice of copying of unlicensed software citing **"It's OK, I'm in favor of it"** or **"It's acceptable because everyone does it"**

- The perceived incidence of using unlicensed software, 80%, continues to be far greater than the actual 5% reported incidence this term

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

- **Gmail**, 61%, up somewhat from last year's 57%, is the one email app students use most often

- 85% spend time with **Instagram** spending an average of 6.0 hours weekly. 79% spend an average of 6.0 hours with **Snapchat**

- 54%, down somewhat from 57% last year and down from 78% two years ago, spend an average of 3.0 hour (down from 4.0 hours) weekly with **Facebook**

- 95% use a social networking site to share photos and most commonly use **Instagram** 78%, **Snapchat** 61%, and **Facebook** 39%

- Students spend an average of 26 hours weekly online, (up 24% from last year's 21 hours and most likely influenced by remote learning)

- **Google**, 73%, 7p from 61%, is the one browser used most often, 21% mention **Safari**, 3% **Firefox** and 3% **IE**

- **Google**, 95%, is the search engine used most often
- In a typical week, 86% use **Facetime** and 27% use **Skype**
- Students are most likely to download/stream **Unlicensed movies or Unlicensed Music**, (each 7%), and least likely to download/stream **Unlicensed eBooks for leisure reading,** 4%

Items Downloaded From File Sharing Sites
Base = All Students

	Total %	Male %	Female %
Unlicensed movies			
None	93	92	93
1 or more	7	8	7
Total mean	0.5	0.8	0.3
User mean	7.5	10.0	4.4
Unlicensed TV shows			
None	93	96	91
1 or more	6	3	9
Total mean	0.2	0.1	0.3
User mean	2.9	2.5	3.0
Unlicensed music			
None	92	93	91
1 or more	7	7	8
Total mean	0.6	1.0	0.2
User mean	8.1	14.4	2.8
Unlicensed eBooks for leisure reading			
None	96	96	96
1 or more	4	4	4
Total mean	0.2	0.2	0.2
User mean	4.5	4.0	5.0

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

School-Related Past Month Internet Experiences Base = All Students	F12 %	F13 %	F14 %	F15 %	F16 %	F17 %	F18 %	F19 %	**F20 %**
Check grades	74	59	74	66	78	73	87	88	**83**
Complete a class assignment	59	50	62	51	66	60	60	50	**60**
Research for school assignment	48	39	39	36	45	37	39	33	**42**
Get help with homework/research question	46	36	40	36	37	26	38	27	**39**
Visit school's site	47	32	38	33	44	35	43	45	**16**

. . . and as consumers

- 67% made an online purchase in the past year
- Students report $3.4 billion in online spending for 10 spending categories

Online Spending Base = All Students Category	Purchasers %	User Mean
Apparel	72	$170
Printed textbooks	67	$283
Footwear	61	$171
Food	57	$210
Kitchen, bed bath items	41	$120
Books, not textbooks	37	$114
eTextbooks	37	$167
Downloadable music	35	$50
Travel, airline tickets	25	$295
Concert, sports tickets	19	$104

Top Web Site . . .

- **Amazon**, 63% is the most commonly visited website followed by **Google**, 57%, and **YouTube**, 56%

Sites Visited Since The Start Of The Fall 2020 Term - Rank Base = All Students			
	Total %	Male %	Female %
Amazon	63	59	67
Google	57	59	55
YouTube	56	61	51
Hulu	39	43	35
Quizlet	38	40	36
Chegg	31	32	29
Apple	28	25	31
ESPN	23	33	12

- **Spotify**, 58%, **Apple Music/Applie iTunes Music Store**, 42% and **Soundcloud**, 15% are the most commonly visited music-related sites visited by students

Music-Related Sites Visited This Term Base = All Students							
	F14 %	F15 %	F16 %	F17 %	F18 %	F19 %	**F20 %**
Spotify	34	29	48	44	52	61	58
Apple Music	N/A	8	23	25	34	27	35
Pandora	N/A	37	43	29	32	30	13
Soundcloud	N/A	15	25	24	20	20	15
Apple iTunes Music Store	30	18	21	15	16	8	7
Amazon Prime Music	26	15	19	9	10	11	7
GooglePlay	N/A	11	9	8	8	8	5
MTV	4	6	5	8	6	1	5

Music-Related Sites Visited This Term Base = All Students	F14 %	F15 %	F16 %	F17 %	F18 %	F19 %	**F20 %**
Tidal	N/A	N/A	9	4	4	3	4
eBay	6	6	4	3	3	1	3
VH1	2	3	2	2	3	1	3
Yahoo	9	6	3	3	2	1	1

Computing on campus . . .

- 55%, down from last year's 70% (and likely attributed to remote learning) use school-owned computers
- 35% "**Don't know**" if school provided, software or hardware technical support is available

Demographics

The demographic profile of the average respondent in this study includes;

- Average age is 20.4 (58% are younger than 21)
- 10% are first in their family to attend college, 1% were in the military (not ROTC), 4% are or were enrolled in ROTC, none are married but 3% have one or more children
- 44% have one or more siblings currently enrolled in a Four Year school and 11% have a sibling currently enrolled in a Two Year school
- 27% live on campus, 50% off campus and the remaining 23% live at home (attributed to COVID19) and commute to school each day
- 77% attend a school in the same state as their permanent home, average student's school is 158 miles from their permanent home
- 7% are employed full-time, 40% part-time and 7% have a paid or unpaid internship
- Students employed full-time work an average of 36 hours weekly compared to 19 hours for those employed part-time (less for internships)
- Annual personal earnings average $4,511
- 49% get money from home averaging $388 monthly

- Monthly discretionary spending averages $147
- Family HH income averages $111,000.
- "Business" is the most common major, 15%, 38% have changed their major at least once and the average GPA is 3.4
- 65% are Caucasian, 12% Latino, 10% Asian American, 9% African-American

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 MONITORÒ Fall 2020 COMPUTING & THE INTERNET.

Eric Weil, Managing Partner
(201) 612-8100
weil@studentmonitor.com

Computing & The Internet

METHODOLOGY

In person, one-on-one, intercept based interviewing for the Fall 2020 COMPUTING & THE INTERNET study was conducted during the three week period beginning October 8th, 2012 among 1,276 college students enrolled in Four Year colleges and universities throughout the United States. All interviewing was conducted on campus by survey researchers.

Respondents were qualified as undergraduate full-time students. Quotas were established to insure equal numbers of males and females within each graduating class. The actual number of interviews completed is as follows:

Completed Interviews by Gender and Year in School			
	Male	Female	Total
Freshman	144	144	288
Sophomore	168	152	320
Junior	172	148	320
Senior	180	168	348
Total	664	612	1,276

Quotas were also established to ensure adequate representation based on school location (North, South, Midwest and West), type of school (Public or Private), and enrollment size.

Completed Interviews by Region, School Type and School Size			
	Under 5,000	5,000 or more	Total
North	136	172	308
South	168	208	372
Midwest	160	164	324
West	124	148	272
Total	584	692	1,276
Public	584	288	872
Private	0	404	404
Total	720	470	1,276