
IAB Mobile Marketing Center of Excellence

**Generation Z and Young
Millennials:
Mobile-First on Campus**

College Students' Views of Mobile Media

September 2015

Agenda

- Introduction & Key Findings
- College Smartphone Users And...
 - Mobile Ads
 - Shopping
 - Learning About Brands
 - Sponsored Content
 - Attitudes Toward and Emotions Regarding Phones
- Conclusions
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Introduction

As a new academic year has begun, and college students and their smartphones are back on campus. Recently there's been a wave of interest in the new cohort of young college students, who have grown up on mobile and digital media and are just beginning to form their own independent relationships with brands and media.

If Millennials are the first “mobile-first” generation, we need some even more superlative moniker for the emerging “Generation Z” group of people under 20, which along with the younger half of the Millennial generation has had smartphones from an even younger age, and literally can't remember a time without continual mobile* connectivity to the internet and social media.

To learn more about these demographics' mobile views, IAB and Qriously partnered to survey U.S. college smartphone users aged 17-25 years old with a focus on 17-19 and compare their views with those of the general U.S smartphone user population (13-65).

We learned that college students are surprisingly open to mobile advertising, and are far more likely to pick mobile as the medium where they see the most relevant ad messages, over TV, PCs and other media. Also surprising were some stark differences between male and females in the college kids group; their views of the mobile world diverge in some key ways marketers should keep in mind. Read on for more...

Key Findings: Advertising

- **College students are more likely than the average smartphone user to cite their mobile as the medium with the most relevant ads (28% versus 22%).**
- **Indeed, mobile is the number one medium college students cite in terms of ad relevancy (in contrast with smartphone users in general, who are more likely to cite TV).**
- **Male college students were more likely than female ones to cite mobile as the platform with the most relevant advertising (33% versus 24%).**
- **College students were also more likely than the average smartphone user to interact with mobile ads (3.9x vs. 3.1x in the past seven days).**
- **Female students were even more likely to interact with mobile ads frequently than male ones.**

Key Findings:

Emotions and M-Commerce

EMOTIONS

- Both college students and smartphone users cited their smartphone as their favorite device. College students were somewhat more likely to do so—and less likely than smartphone users to name TV.
- When using their smartphones, College students report feeling excited (18%), productive (17%) and curious (13%) as dominant emotions
- Smartphone separation anxiety is real. When away from their smartphones, college students were more likely than average to report feeling stressed (23% vs.19%), particularly true of female college students (27%).

M-COMMERCE

- Students are m-shoppers: almost 3 students out of 4 say they make purchases via their smartphone which is significantly more than the average smartphone user (2/3)
- 23% of students say they “often” make purchases using their smartphones, as compared to 18% of all smartphone users.

Key Findings:

Brand Selection and Sponsored Content

BRAND SELECTION

- **Students were significantly more likely to choose a brand based on their social media (16% vs. 10%) and friends' opinions (13% vs. 9%) compared to all other smartphone users.**
- **Social media is particularly important as a brand selection criterion for female college students (19%).**

BRAND-SPONSORED CONTENT

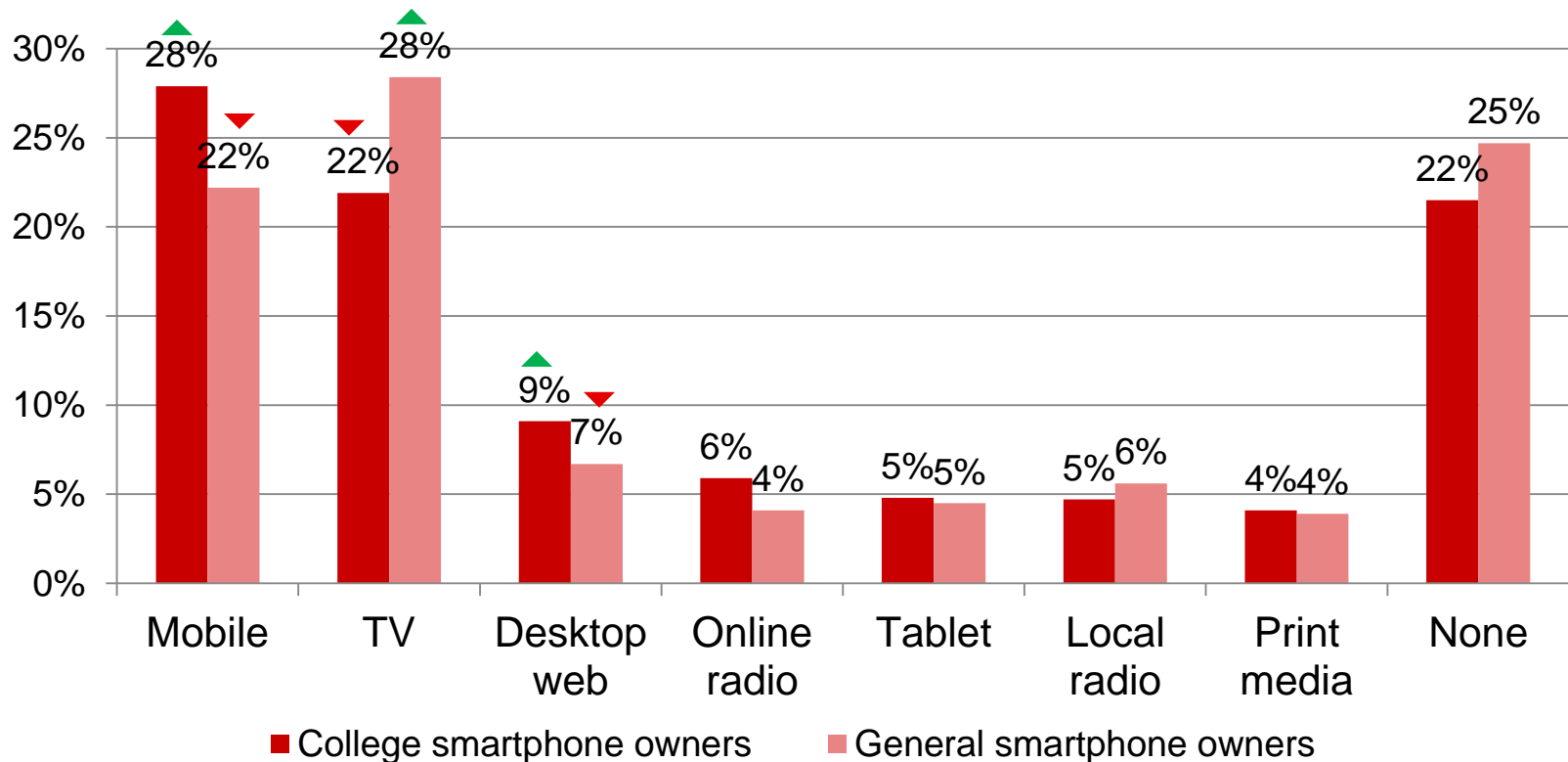
- **College students are relatively wary of brand-sponsored content, with almost 40% stating they trusted it less than other kinds of content.**
- **Male students were much more likely to trust brand-sponsored content vs. female students (38% vs. 25% trusted brand-sponsored content more than ordinary content).**

College Students and Mobile

**Mobile Advertising Works for
Reaching College Students**

College Students Most Likely to See Relevant Ads on Mobile

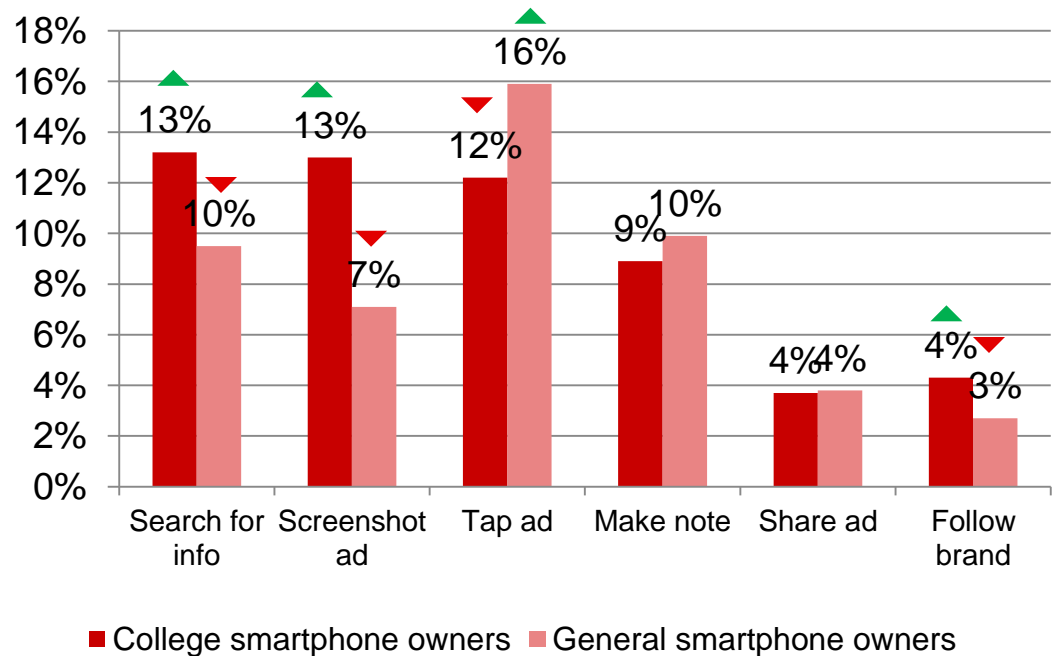
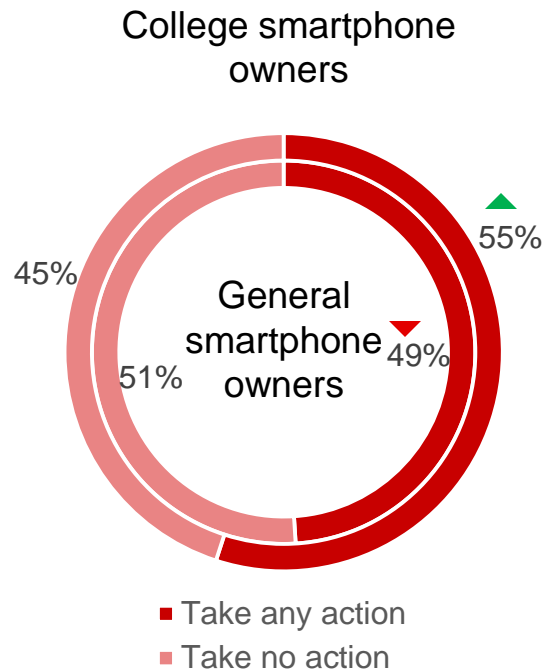
- Mobile is the medium where students most frequently see ads that feel relevant to them.
- They cite mobile significantly more than all other smartphone users (28% vs. 22%).
- TV comes second but students are less likely to be exposed to relevant ads through on it compared to all other smartphone users (22% vs.28%)



Q: Where do you most frequently see or hear ads that are most relevant for you?

College Students Take Action Based on Mobile Ads

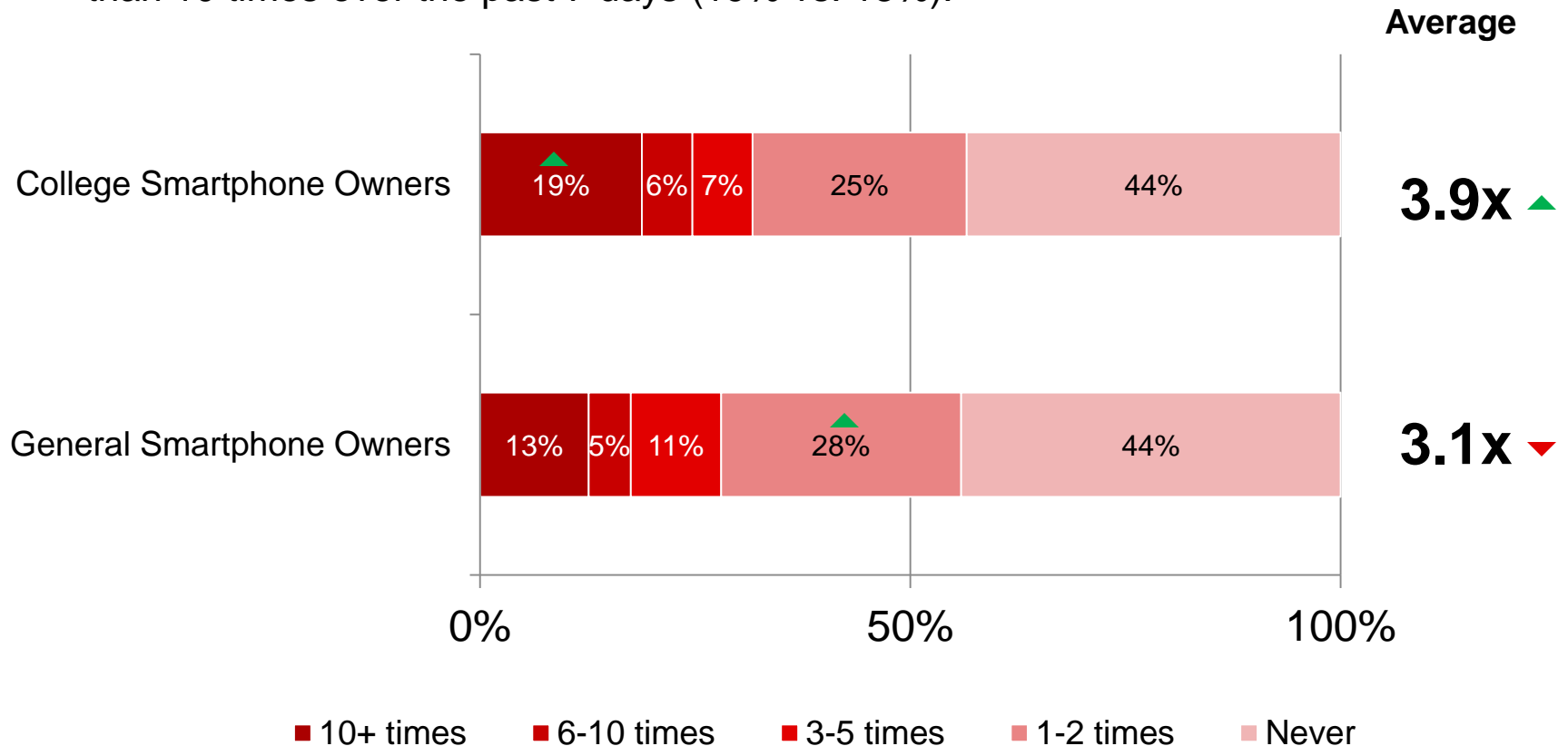
- 55% of college students indicated they took some action when seeing a relevant ad on their mobile device—higher than the level for all smartphone users (49%).
- Surprisingly, tapping the ad is not the most likely interaction form. Students were significantly more likely to search for information (13% vs. 10%) and screenshot ads (13% vs. 7%), but also less likely to tap the ad than all other smartphone users (12% vs. 16%).



Q: When you notice a relevant ad on your mobile, you are most likely to...

College Students Also More Likely to Say They Frequently Interact With Mobile Ads

- Overall students don't seem to interact with mobile ads more than all other smartphone users, but they were significantly more likely to have interacted with mobile ads more than 10 times over the past 7 days (19% vs. 13%).

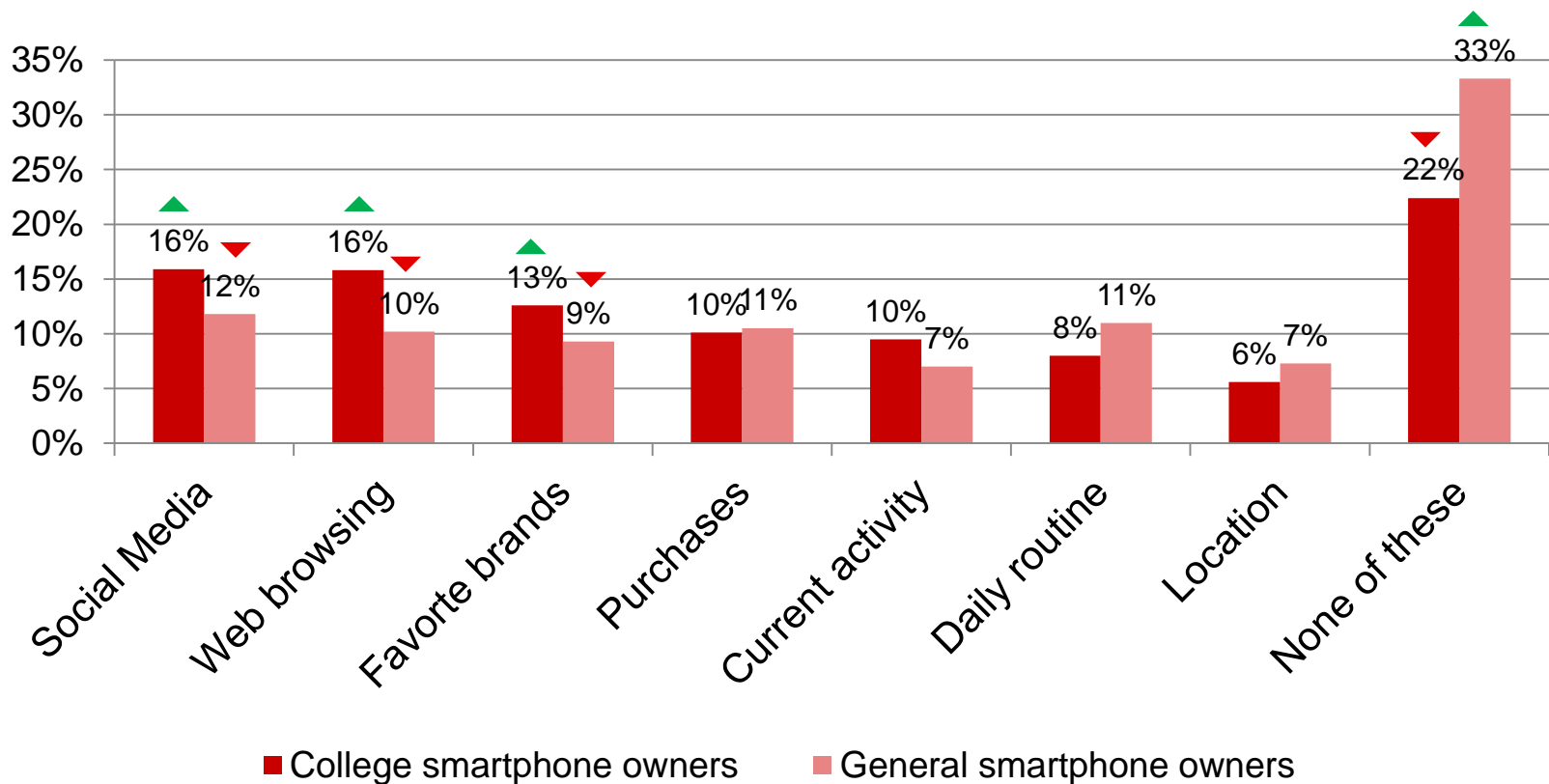


9 Q: How often have you tapped on or interacted with a mobile ad over the past 7 days

▲ ▼ Arrows denote direction of statistically significant association at 95% confidence level











Social, Web, Favorite Brands Drive Ad Relevancy for College Students

- Students were significantly more likely to notice mobile ads tailored to them based on social media (16% vs.12%) and web browsing (16% vs.10%).



Q: I'm most likely to notice mobile ads that are tailored to me based on...

Male and Female College Students See Ads Differently

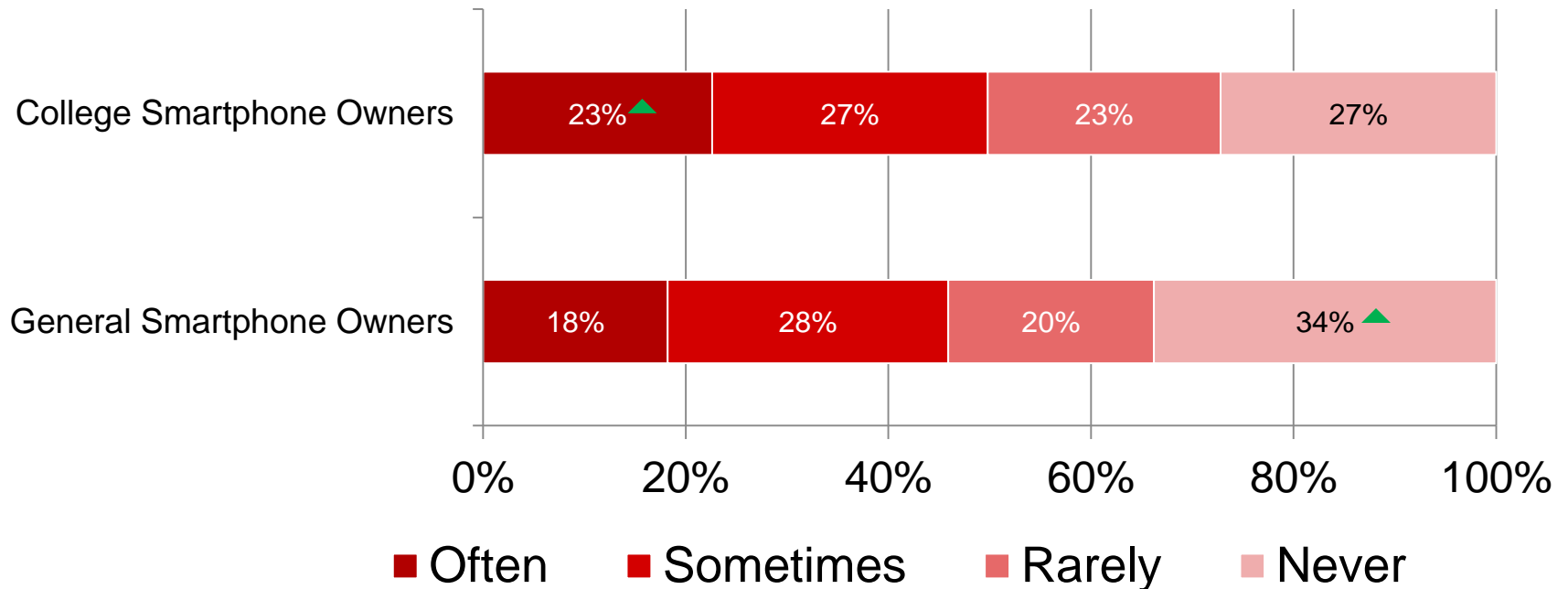
Criteria		Male College Students	Female College Students
Most relevant advertising medium			
	Mobile	 33%	 24%
	Desktop	 11%	 8%
	TV	 19%	 25%
Interactions with ads			
	Interacted with mobile ads >10 times in the past week	 14%	 22%
Relevancy factors for ads			
	Most often notice tailored ads based on social media	 12%	 19%



College Students and Mobile
College Smartphone Users
Shop Via Mobile

College Students More Likely to Embrace Mobile Commerce

- Students are significantly more likely to buy products or services on their smartphone vs. other smartphone users (73% vs.66%). 23% of students indicated they often use their smartphones for this purpose (compared to 18% of other smartphone users).
- They are also more likely to say that they make smartphone purchases “often.”

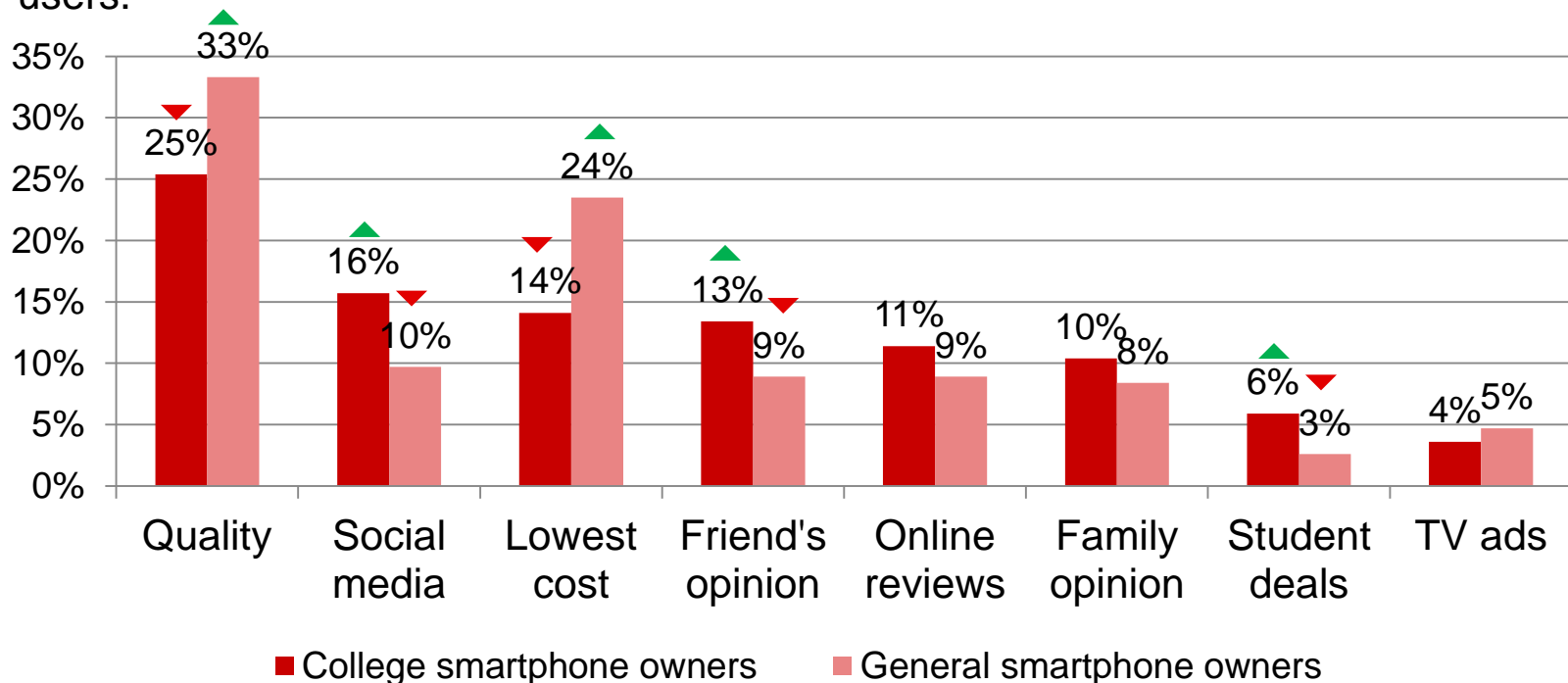


College Students and Mobile

**College Smartphone Users and
Brand Selection**

Social Media Plays Important Role in College Student Brand Choices

- Although quality and low costs are important factors students consider when choosing brands, these factors are significantly less important to them compared to the considerations of all other smartphone users (25% and 14% vs. 33% and 23.5%).
- Students were significantly more likely to choose a brand based on their social media (16% vs. 10%) and friends opinion (13% vs. 9%) compared to all other smartphone users.



Q: I am most likely to choose a brand based on...

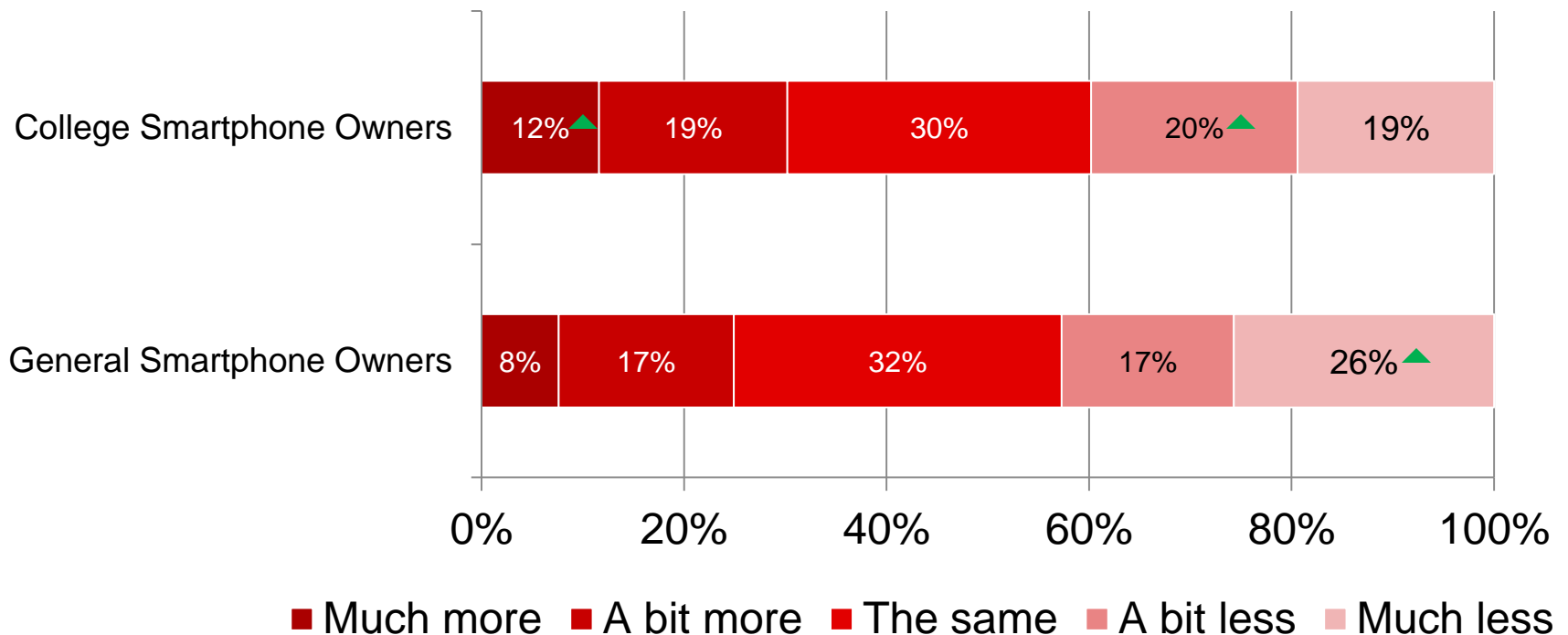


College Students and Mobile

**College Smartphone Owners and
Sponsored Content**

College Students Somewhat More Likely to Trust Brand-Sponsored Content

- Students are relatively wary of brand-sponsored content, with almost 40% stating they trusted it less than ordinary content.
- But they place more trust in it than do smartphone users generally.
- Male students were more likely to say they trusted brand-sponsored content more than other content types compared to female students (38% vs.24.5%).



17 Q: Relative to ordinary content, how much do you trust brand-sponsored content?

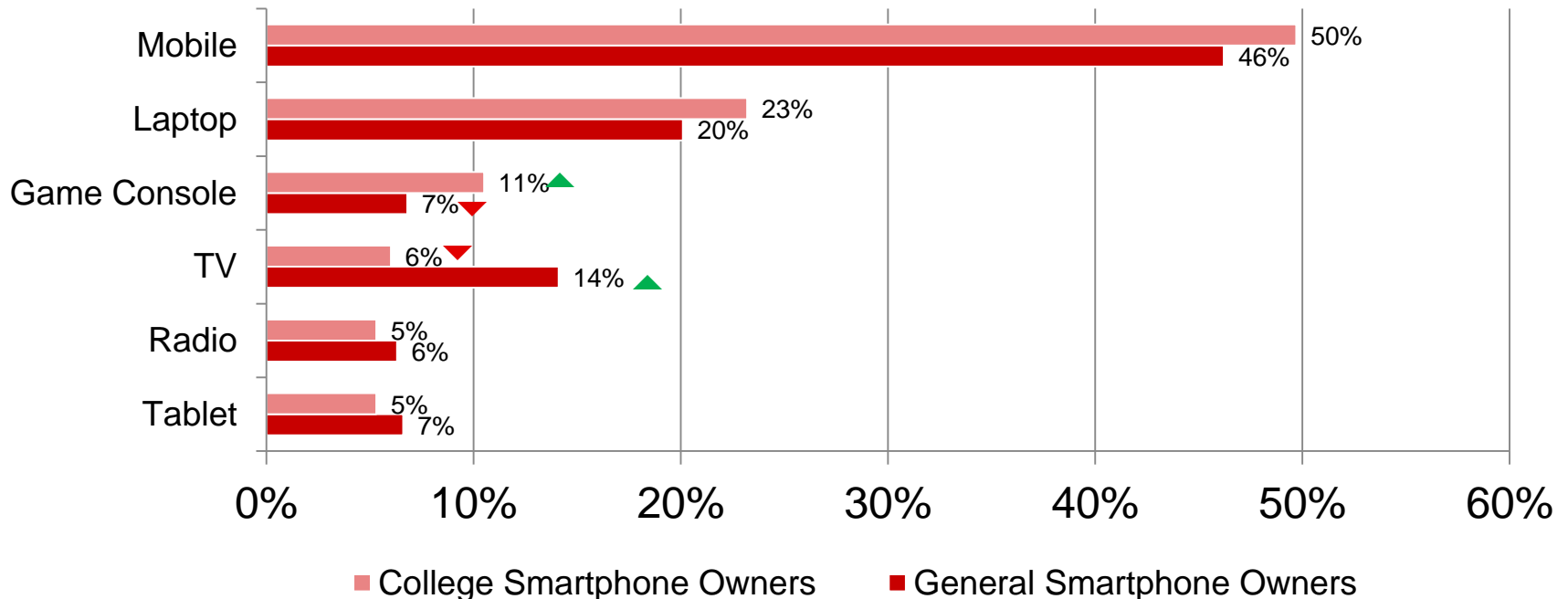


Arrows denote direction of statistically significant association at 95% confidence level

College Students and Mobile
Perceptions of and Emotions
Related to Mobile

Smartphones are the Indispensable Device for Everyone

- The majority of college students and other smartphone users indicated that mobiles were their favorite device.
- Laptops were the students' second favorite device (23%).
- Interestingly, students are significantly more likely to keep their game consoles (10.5% vs.7%), especially males (19%) and less likely to keep their TV (6% vs.14%) compared to other smartphone users.

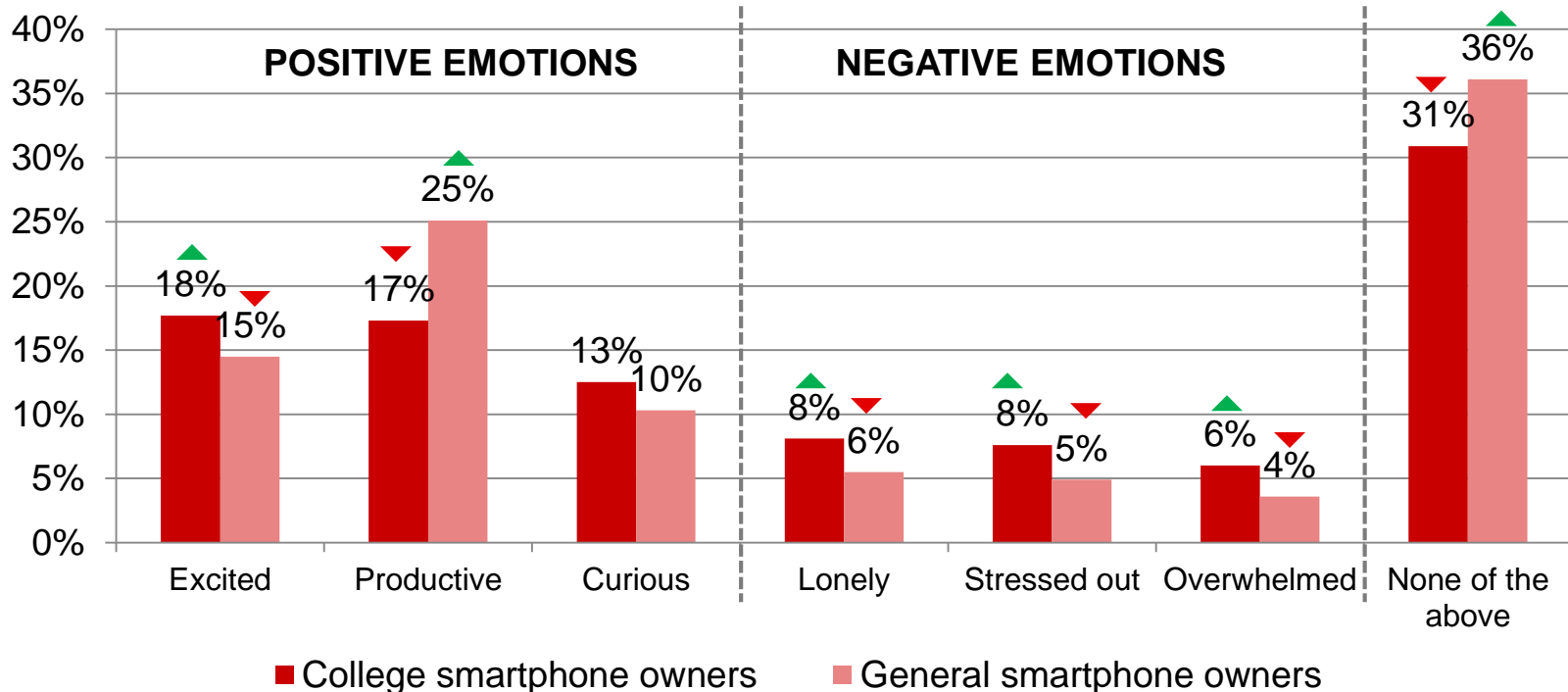


Q: If you could only keep one device, which would it be?



College Students Mainly Feel Positive When Using Their Phones

- When using their smartphone, college students mainly feel excited (18%) or productive (17%).
- However, compared to other smartphone users, students were significantly less likely to feel productive when using their phones (17% vs. 25%), and more likely to experience negative emotions, with higher proportions of students feeling lonely (8% vs. 6%) and stressed out (8% vs. 5%) than other smartphone users.
- Male and female college students report very similar emotions linked to smartphone use.

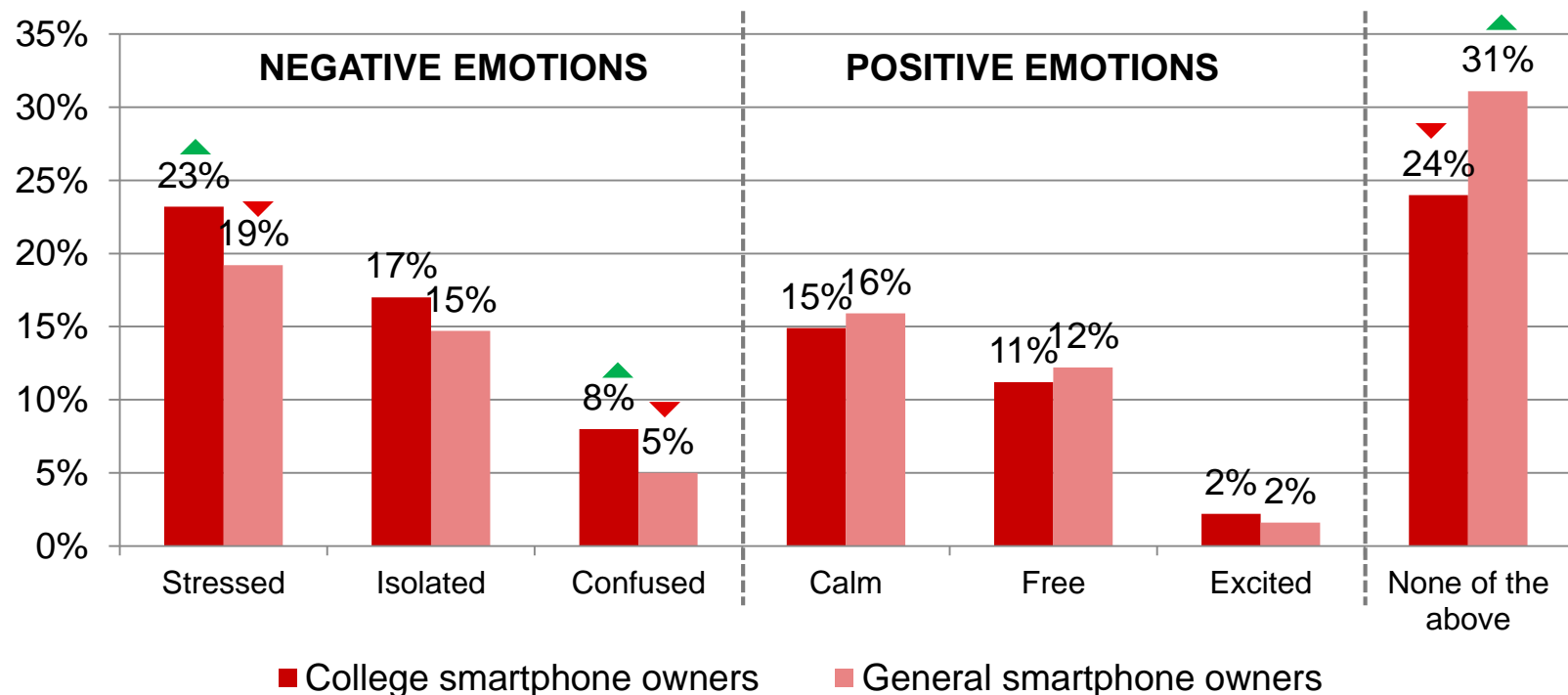


Q: Using your smartphone mainly makes you feel more...



College Students More Likely than Other Smartphone Owners to Experience Phone Separation Stress

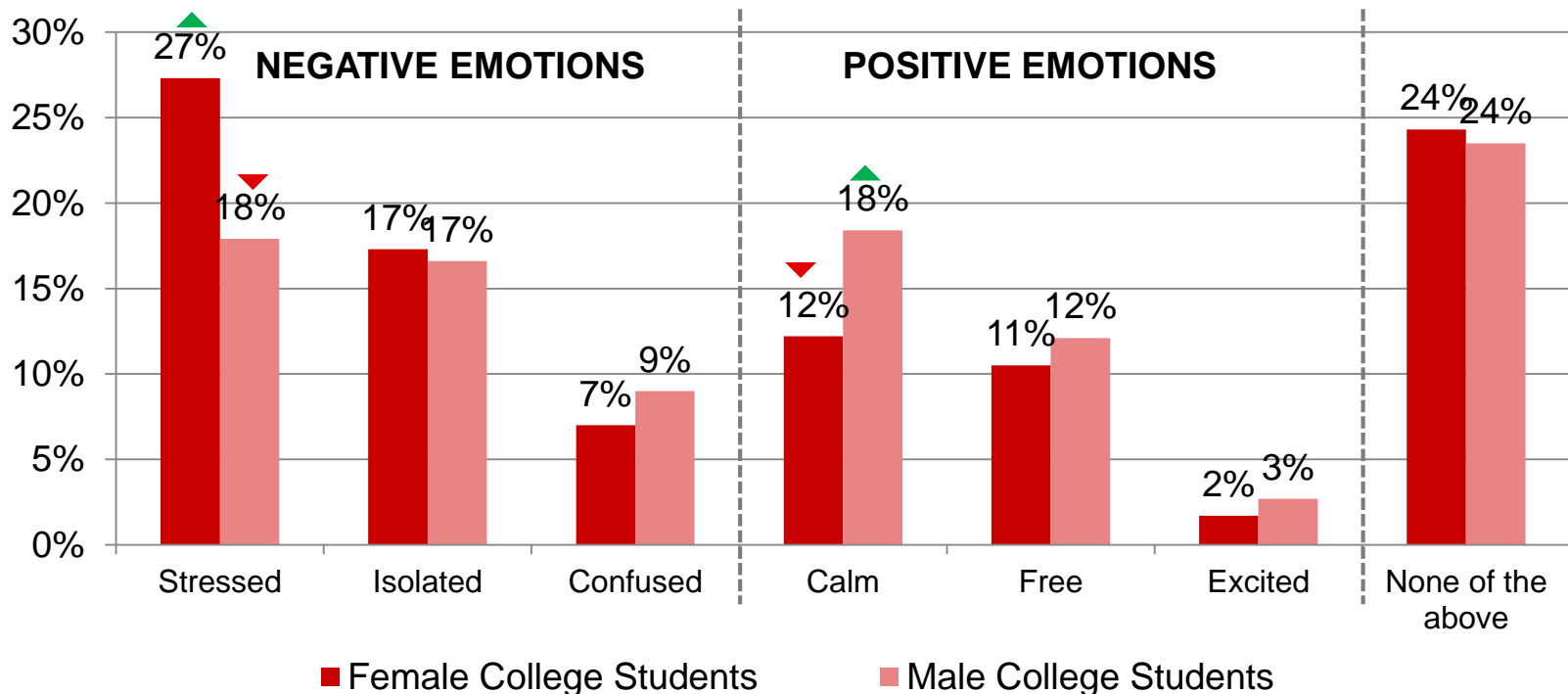
- When students don't have their smartphone nearby, they mainly experience negative emotions such as feeling stressed (23%) or isolated (17%). However, some experience more positive emotions and say they feel calm (15%) or free (11%).
- Students were more likely to report feeling negative emotions like stressed (23% vs.19%) and confused (8% vs.5%) than other smartphone users.



Q: How do you feel when you don't have your smartphone nearby?

Women College Students Even More Likely Than Men to Feel Phone Separation Anxiety

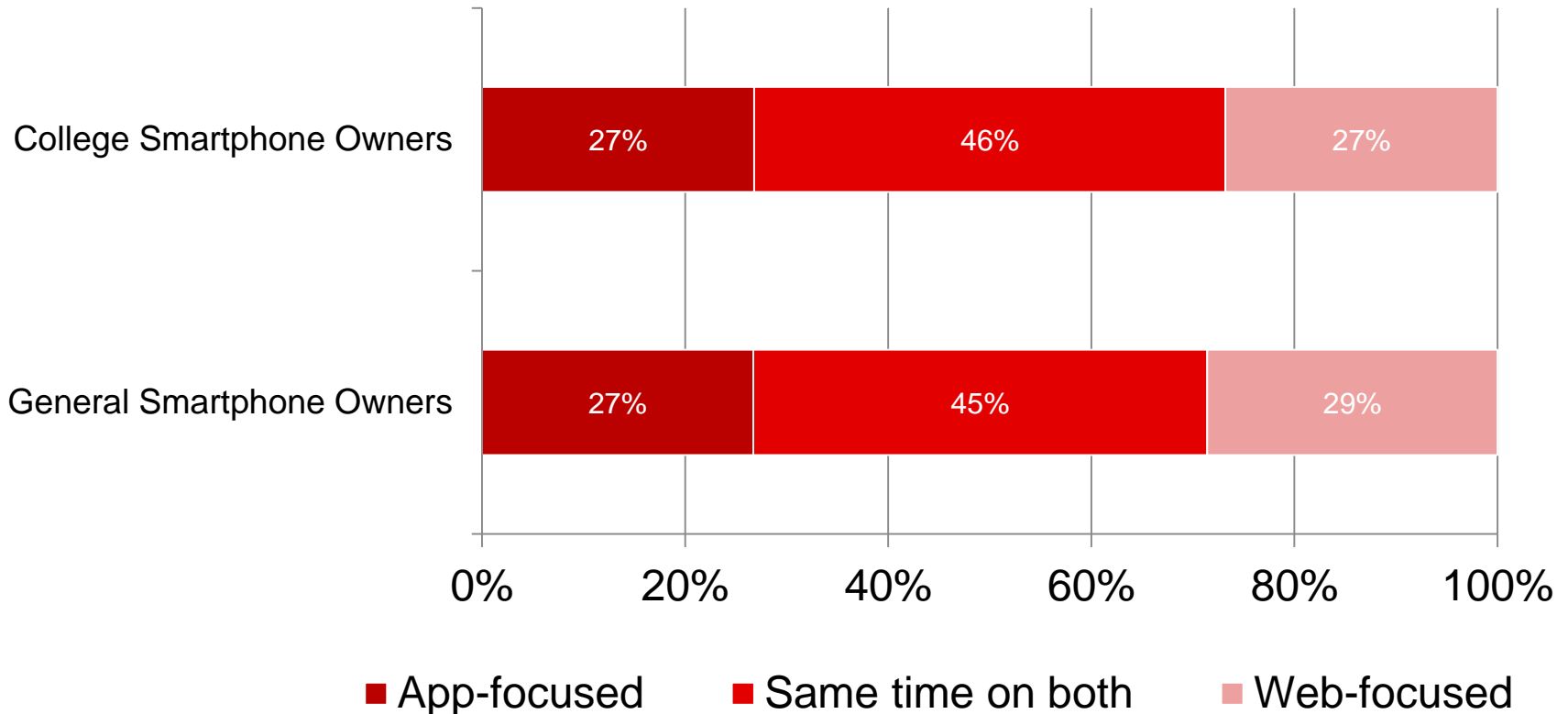
- Students' emotions differed based on their gender. Female students seem significantly more addicted to their smartphone as they feel more stressed (27% vs. 18%) and less calm (12% vs. 18%) than male students when their smartphones were not nearby.
- Exploring causes of these differential emotional reactions would make for an interesting follow-up study.



Q: How do you feel when you don't have your smartphone nearby?

College Students, Like General Smartphone Audience, Perceive Web- and App- Use Equally

- Both young college students and the general smartphone using population are about equally likely to say they are mainly mobile web-focused and app-focused. Most say they use both equally
- This suggests that both apps and mobile web are extremely important, to mobile internet users of all ages.



Q: Which of the following best describes your mobile Internet use?



Implications for Marketers

- **Mobile is vital for reaching the elusive college male demographic: they were far more likely than college women to say mobile is the medium with the most relevant ads to them.**
- **College women seem more addicted to their smartphones, and they are also more likely to interact with mobile ads frequently. However, they are also more likely to say TV was the most relevant ad medium.**
- **College students with smartphones are more open to advertising on those devices than the average smartphone user. They interact more frequently with mobile ads, too, favoring interaction behaviors such as taking screenshots of ads and searching for info over tapping/clicking.**
- **Smartphones are also an important shopping medium for this segment: college students were much more likely than the general smartphone owner population to make purchases on their phones-- and to do so frequently.**

Methodology

The “Gen Z and Young Millennials: Mobile First on Campus” survey was conducted from August 19 – September 11, 2015 in the U.S. using the Qriously mobile survey platform.

Two samples were interviewed:

- 1,018 smartphone users who identified themselves college students aged 17-25 (mostly incoming freshmen and sophomores)
- 1,096 smartphone users who were representative of the general smartphone-user population in the U.S.

About IAB

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. It is comprised of more than 650 leading media and technology companies that are responsible for selling, delivering, and optimizing digital advertising or marketing campaigns. Together, they account for 86 percent of online advertising in the United States. Working with its member companies, the IAB evaluates and recommends standards and practices and fields critical research on interactive advertising. The organization is committed to professional development, elevating the knowledge, skills, and expertise of individuals across the digital marketing industry. The IAB also educates marketers, agencies, media companies and the wider business community about the value of interactive advertising. Founded in 1996, the IAB is headquartered in New York City.

About Qriously

Qriously is a data and advertising platform. It accesses the mindset of billions of people all over the world by asking questions on mobile devices. Answers to those questions are used to engage relevant audiences and unearth valuable insights.

www.qriously.com