



2008 COLLEGE AMPLIFIED

DECODING THE CAMPUS EXPERIENCE

By AMP Agency in partnership with ARAMARK Higher Education



An Alloy Media + Marketing™ Company



Totalling 13.6 million in the United States and having spending power exceeding \$237 billion annually, college students represent one of the largest, most appealing – and elusive – consumer segments for marketers and brands.

College marks a time of transition, and these individuals are in the process of determining their likes and their dislikes and brand preferences. By establishing loyalty with college consumers early on, brands have the potential to gain loyal, lifelong customers.

However, college students are increasingly difficult to reach. Their expectations of the brands they encounter in college are high, their needs as consumers are evolving, and they are extremely territorial and protective of their college community. So how exactly can brands reach and make a positive impact on today's college market?

WHAT WE DID:

- Discussion groups on seven college campuses with 47 college students
- Half-daylong student shadows and consumer intercepts on two college campuses
- Online survey of more than 2,500 current college students, ages 18–24

KEY QUESTIONS ADDRESSED:

- What do companies need to know about college students' lifestyles, mind-sets, motivations and behaviors to better connect with college consumers?
- What are the daily lifestyle touch points of college students, and how do they translate to brand affinity and loyalty?
- Which touch points have the greatest impact on students' college experience, and what can companies do to enhance or improve this experience?
- How can companies leverage the power of Green to build customer advocacy in college students?

TOUCH POINT DEFINED:

Any point in the customer transaction of purchasing or using a product or service where the customer experiences, or is touched by, the brand.

COLLEGE TOUCH POINTS EXPLORED:

- Virtual Interactions
- Live First Impressions
- Residential Areas
- Campus Dining
- Modes of Transportation
- Campus Life

THERE ARE SPECIFIC POINTS OF ACCESS FOR BREAKING INTO THE COLLEGE BUBBLE

AMP Agency, in partnership with ARAMARK Higher Education, a leading provider of dining and facility services to universities, set out to understand the realities of college life today and uncover points of entry for brands and marketers looking to connect with and build customer loyalty in college students.

Using both qualitative and quantitative research methodologies, AMP Agency spoke with 47 college respondents in person and surveyed more than 2,500 college students online to determine exactly where and how brands can align their products and services with college students' lifestyle experiences, unmet needs and high expectations.

With this study, we have uncovered what is most important to college students in the college environment and provided a framework that brands can leverage to better connect to the needs of this fickle audience.

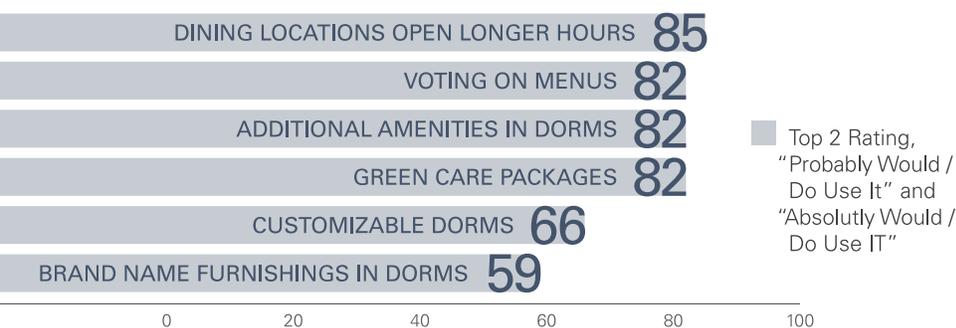
COLLEGE HAS BECOME A LUXURY GOOD. THIS HAS GREAT IMPACT ON STUDENTS' EXPECTATIONS OF THEIR COLLEGE EXPERIENCE

Getting into college has become as competitive as it is expensive. The exorbitant costs associated with college educations, coupled with an increase in demand for a college degree, has great impact on students' expectations of the products and services they encounter at school. Considering the luxury-good status of college, students are now demanding that brands entering into this space offer them a certain level of control over how they interact with a product or service.

College students have grown accustomed to getting what they want, when and how they want it. Within the college environment especially, customization, convenience and flexibility contribute greatly to perceived value.

While approximately half (52%) of college students surveyed look favorably on the products and services provided on campus, a mere 19% classify these offerings as excellent. We found that on-campus enhancements that interest students most meet their need for increased convenience and the feeling that they have input on their on-campus experience, as evidenced in the chart below.

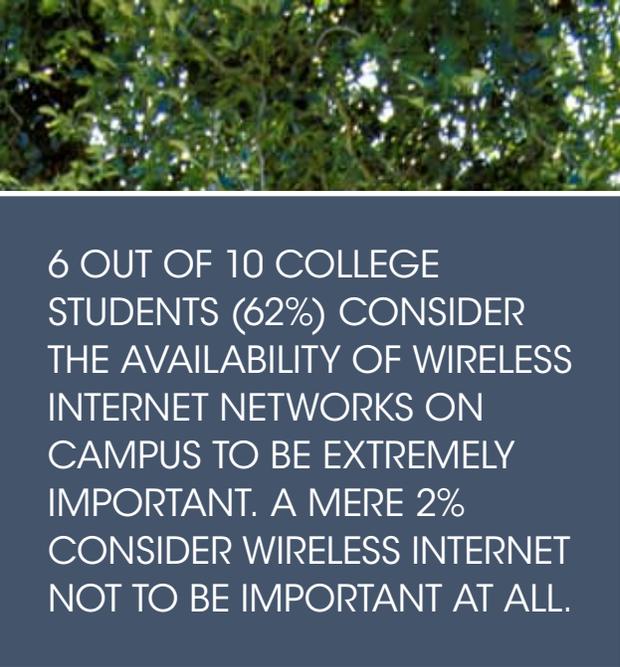
NEW PRODUCTS OR SERVICES STUDENTS WOULD USE ON-CAMPUS



There is an incredible opportunity for brands to better engage college students by understanding the nature of students' product and service needs within the college environment.



IN 2007-08, THE AVERAGE COST OF PRIVATE FOUR-YEAR COLLEGES REACHED \$23,712 PER YEAR (UP 6.3% FROM THE PREVIOUS YEAR) AND PUBLIC FOUR-YEAR COLLEGES ROSE TO \$6,185 PER YEAR (UP 6.6% FROM THE PREVIOUS YEAR).



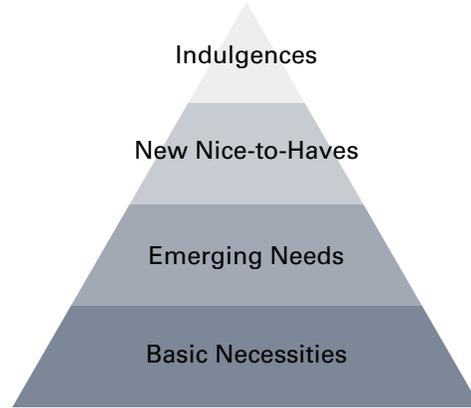
6 OUT OF 10 COLLEGE STUDENTS (62%) CONSIDER THE AVAILABILITY OF WIRELESS INTERNET NETWORKS ON CAMPUS TO BE EXTREMELY IMPORTANT. A MERE 2% CONSIDER WIRELESS INTERNET NOT TO BE IMPORTANT AT ALL.



BUILDING LOYALTY IN COLLEGE STUDENTS OCCURS IN STAGES

Before establishing programs, products or services intended to “wow” college students, brands must deliver on the basic items they need and expect to be provided. This figure represents a framework for building customer and brand loyalty in college students, starting from the ground up:

COLLEGE CUSTOMER HIERARCHY OF NEEDS



Today’s college consumers come with a new set of requirements. Based on the findings from this study, we have classified this hierarchy of needs and provided examples to illustrate distinctions between each stage. Below is an overview of each category within this hierarchy, which we address in full detail in the study.

BASIC NECESSITIES This relates to a company’s ability to deliver on the product or service fundamentals. Put simply, deliver to the customer what you say you are going to deliver and offer good quality at a good value.

On-campus example: Hot running water every morning in the bathroom

EMERGING NEEDS This is where brands begin to separate themselves from competitors and provide additional value to customers by accommodating their emerging needs. One example is AT&T allowing customers to roll over their unused cellphone minutes, month to month. Customers feel entitled to use the minutes they’ve purchased when and how they wish, and do not want unfair restrictions on how they stay connected to their social network.

On-campus example: Access to free wireless Internet on campus

NEW NICE-TO-HAVES At this level, brands further define who they are and what makes them unique to other brands. One example is J.Crew retail stores handing out water bottles to customers as they shop and wait in register lines. This unexpected handout enhances shoppers’ comfort level.

On-campus example: Personal temperature-control dials in dorm rooms

INDULGENCES This refers to brands going above and beyond the basics to deliver enhanced products or experiences that strongly connect with customers. For example, Hertz Rent A Car

Gold Members' cars are running from the moment their flights land, eliminating their wait times. This rewards customer loyalty with a hassle-free experience and special treatment.

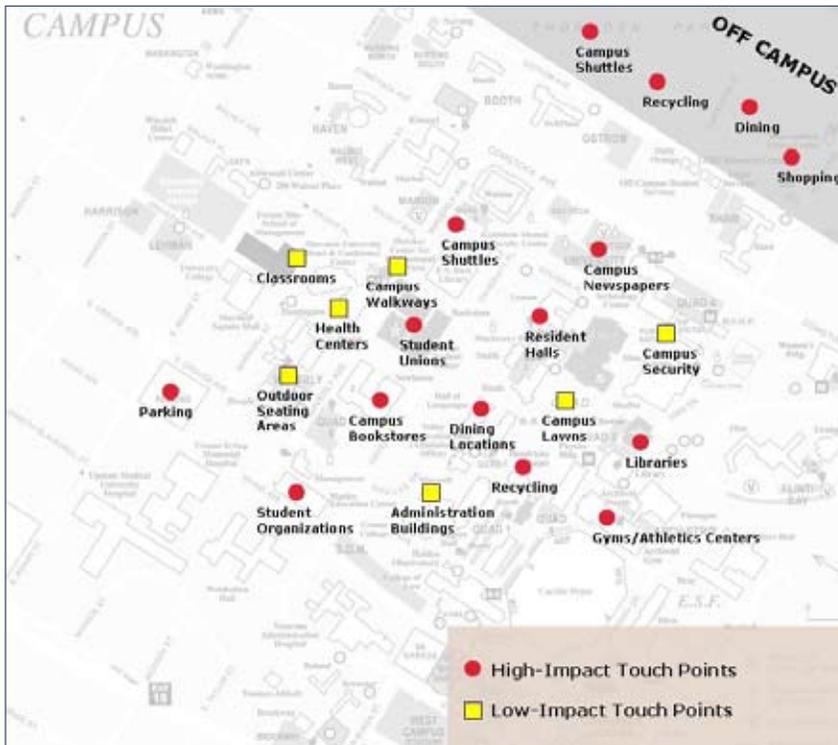
On-campus example: Heated, underground tunnels connecting buildings

Today's college students' expectations are high, so brands must tailor their messages and product and service offerings to directly address college consumers' evolving needs. AMP Agency can show you how.

ALL TOUCH POINTS ARE NOT CREATED EQUAL

As shown in the campus touch point map below, not all touch points wield the same level of influence on college students. Certain touch points are more significant to students than others, so they have varying degrees of impact on students' overall college experience.

CAMPUS TOUCH POINTS



Our research has uncovered the touch points in the college space that are most significant to college students today. Brands can leverage these findings to determine where and how to approach college consumers in more meaningful ways.

In this study, we address students' current experience within each touch point and provide best practices and recommendations for enhancing that experience. We examine the following college touch point categories in detail in the report: **Virtual Interactions, Live First Impressions** (Campus Tour, Moving Day, New-Student Orientation), **Residential Areas** (Shared Bathrooms, Resident Halls), **Campus Dining, Modes of Transportation** (Campus Shuttles, Bikes, Parking), and **Campus Life** (Shared Social Spaces, Campus Activities, The Gym).

40% OF COLLEGE STUDENTS
FIND IT EXTREMELY DIFFICULT
TO MANAGE THEIR TIME
WHILE AT SCHOOL.





WHEN LEVERAGED IN THE RIGHT WAY, GREEN IS A LOYALTY BUILDER IN COLLEGE STUDENTS

Green carries great relevance with this audience. This generation has grown up believing the environment is a resource and feels responsible to make earth-friendly changes to conserve it. They hold companies up to even higher standards due to their belief that companies have greater resources with which to make a greater impact.

While the health of the environment is a global concern, Green is not a one-size-fits-all mind-set. College students think and act in different shades of Green. Because students vary in their level of eco-consciousness and eco-conscientiousness, brands must understand the eco-climate of a campus before enacting Green initiatives.

LEVEL OF GREEN ENGAGEMENT AND ECO-FRIENDLY EXPECTATIONS

LOW ————— HIGH

Anti-Litter:	Recycling:	Energy Conservation:	Sustainability:
Putting waste in trash receptacles	Recycling and buying recycled goods	Limiting usage, including electricity, water and gas	Buying less, buying local, reusing over recycling

Our study points out where students and universities currently fall on this Green Engagement spectrum, and provides thought-starters on how to effectively connect to and inspire action from the college audience in the name of Green.

BRANDS CAN WORK WITH COLLEGE ADMINISTRATORS TO HELP SET THE BAR ON GREEN

The university plays a primary role in establishing a campus Green infrastructure by instituting the programs and practices provided to students on campus. However, we found that many college students feel limited by the earth-friendly resources that are currently provided to them within the campus environment.

College students feel motivated to follow through on their eco-friendly instincts when they are empowered to do so. This represents a great area of opportunity for companies to use their power to bring recognition and authenticity to on-campus Green initiatives. If done in a way that aligns with college students' evolving needs and expectations, brands can position themselves to those students as true facilitators of Green.

"IF IT'S EASY TO DO, I'LL DO IT. BUT IF I HAVE TO GO OUT OF MY WAY TO BE GREEN, THEN I'M NOT GOING TO TAKE TIME TO DO IT."

FEMALE FRESHMAN,
SOUTHERN METHODIST UNIVERSITY

The college environment plays a significant role in shaping these young consumers' habits and preferences, and is typically a difficult bubble to break into. The key to establishing lasting relationships with college students lies in building credibility and value within the college community and by understanding how the campus environment shapes these needs and expectations.

College AMPlified decodes today's college experience, explores students' evolving needs and expectations, and provides strategies and tactics that brands can leverage to enhance the college experience and establish a deeper connection to college consumers.

WANT TO LEARN MORE?

This Executive Summary is just the tip of the iceberg. For more information, read AMP Agency's white paper and you'll learn more about the following:

- Best practices and tactics for enhancing the college experience within each touch point category
- Case studies to illustrate touch point best practices in action
- Strategies for breaking into the college bubble
- Current earth-friendly behaviors, perceptions and awareness of on-campus Green activities by college students today
- Areas of opportunities for brands looking to leverage Green to build customer advocacy in college students

AMP Agency has the knowledge and experience to guide you in developing a strategy to connect with and build loyalty in college students today. We are offering a tailored, in-person presentation of all the study findings, as well as opportunities for full- or half-day working sessions to address your specific business objectives in the college market.

RESEARCH METHODOLOGY

College AMPlified presents the findings of in-person discussion groups and student shadows with a total of 47 college students, and an online survey conducted among a sample of 2,508 college men and women between the ages of 18 and 24. Each phase of the research was designed to capture the opinions, beliefs, and perceptions of college students in terms of their college and campus experience.

The focus groups were held on seven college campuses from October to December 2007, and the survey was completed over two days, starting April 3, 2008, and ending April 4, 2008. The margin of error for a sample size of 2,508 is +/-1.96 percentage points based on the principles of probability sampling theory. This survey follows industry best practices but, like all online surveys, cannot strictly adhere to pure probability sampling methods.



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ABOUT AMP AGENCY

AMP Agency (www.ampagency.com) is a full-service marketing agency that combines strategic planning, compelling creative, innovative execution, and measurable results to help our clients' success and marketing dollars exceed the traditional. With a concentration on targeted lifestyle, life-stage, and mind-set marketing, AMP Agency makes Brand Experience an integral part of any marketing plan, as well as a lasting memory in the consumer mind. AMP Agency is the marketing agency within the Alloy Media + Marketing family of companies.

ABOUT ALLOY MEDIA + MARKETING

Alloy Media + Marketing (NASDAQ: ALOY) is one of the country's largest providers of nontraditional media programs reaching targeted consumer segments. We manage a diverse array of assets and services in interactive, display, direct mail, content production and educational programming. Within the Alloy Media + Marketing group of companies, marketers and their agencies can access the depth of expertise and breadth of programming needed to meet their specific goals. Longstanding, quality relationships and proprietary partnerships enable us to provide unique access to consumers nationwide. We work with more than 1,500 companies, including half of those in the Fortune 200.

ABOUT ARAMARK HIGHER EDUCATION

ARAMARK Higher Education, a division of ARAMARK Corporation, provides a wide range of food, facility and other support services to approximately 600 colleges and universities in the United States. ARAMARK offers higher education institutions a single source for dining, facility, conference center, and stadium and arena services. Dining services offered include: master planning; culinary development and venue design; catering; residential, quick-serve, and express dining concepts. Facility services offered include: facilities maintenance; custodial; grounds; energy management; capital project management; and building commissioning.

