



College 2026

Understanding today's student, how they buy, and what it means for brands

A flytedesk research report

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Perception is market share

Back-to-college spending reached \$88.8 billion in 2025. Per-student spending has more than doubled since 2008, rising at more than twice the pace of general inflation. By any measure, this is one of the most significant consumer spending events of the year, and one of the least well understood.

This report is an attempt to fix that.

The report draws on flytedesk's own surveys of nearly 3,000 students across 102 campuses in 2026, alongside national data from IPEDS, the NRF, the College Board, and IIE Open Doors. The goal was not to document that college students spend money. The goal was to understand when they spend, what drives their decisions, who they are as a cohort in 2026, and how brand perception actually forms in the campus environment.

Our findings show that the college years represent a genuinely distinct consumer moment. Students arrive on campus making independent purchasing decisions, often for the first time, across nearly every category: food, personal care, financial products, apparel, electronics, subscriptions. The brands they adopt during this period have a demonstrated tendency to follow them into adulthood. The window is real, and it is finite.

We ran a simulated purchase test to examine the relationship between perception and purchase, asking students which brand they purchased most recently across nine categories and which brand they believe is most popular on campus. When a student believed a brand was the campus leader in its category, they were between 1.2 and 2.6 times more likely to have purchased it. Perception, in this context, is not a soft signal. It is a purchase predictor.

Campus accelerates this dynamic because of its physical structure. Students live, study, eat, and socialize within a geographically constrained space, repeatedly moving through the same environments alongside their peers. That density makes social signals unusually legible and unusually influential. A brand that achieves saturation on campus does not just reach students – it shapes what students believe other students are choosing, and that belief drives behavior.



When a student believed a brand was the most popular on campus, they were up to 2.6 times more likely to have purchased it. Perception, in this context, is not a soft signal. It is a purchase predictor.

Methodology

This report draws on three flytedesk student research studies conducted in 2026 and is supplemented by national enrollment, retail, and higher education data from IPEDS, NRF, the College Board, and IIE Open Doors. The surveys reached over 3,000 students across 102 unique campuses, 29 states, and Washington, D.C.

April survey responses were weighted by gender and race/ethnicity to align with enrolled four-year college students nationally. The primary April survey was additionally weighted by first-generation student status.

All survey findings are self-reported. Multi-select totals may exceed 100%. A/B test results should be read as directional indicators, not exact in-market predictions.

3,000

completed responses

102

unique campuses

External sources

IPEDS Fall 2024

NRF 2025 Back-to-School Survey

IIE Open Doors 2025

College Board

Additional sources are cited where used.





Section 1

Understanding Back-to-college

When students buy, what drives them, and where most of the market actually happens

An \$88.8B market opportunity

Back-to-college spending has grown steadily for two decades. Total market spending reached \$88.8 billion in 2025, up from \$86.6 billion in 2024 and roughly \$67.7 billion in 2020. Per-student spending has risen from \$599 in 2008 to \$1,326 in 2025 – a 121% increase over 17 years, outpacing general inflation by more than double (National Retail Federation, Back-to-College Data Center, 2025).

The increase reflects the expanding scope of what students now consider college essentials. New categories have entered the mix: streaming subscriptions and software and digital tools – categories that would not have appeared on a back-to-college list a decade ago – now account for meaningful planned spending, with 34.7% and 20.6% of students expecting to spend on each, respectively, in 2026.

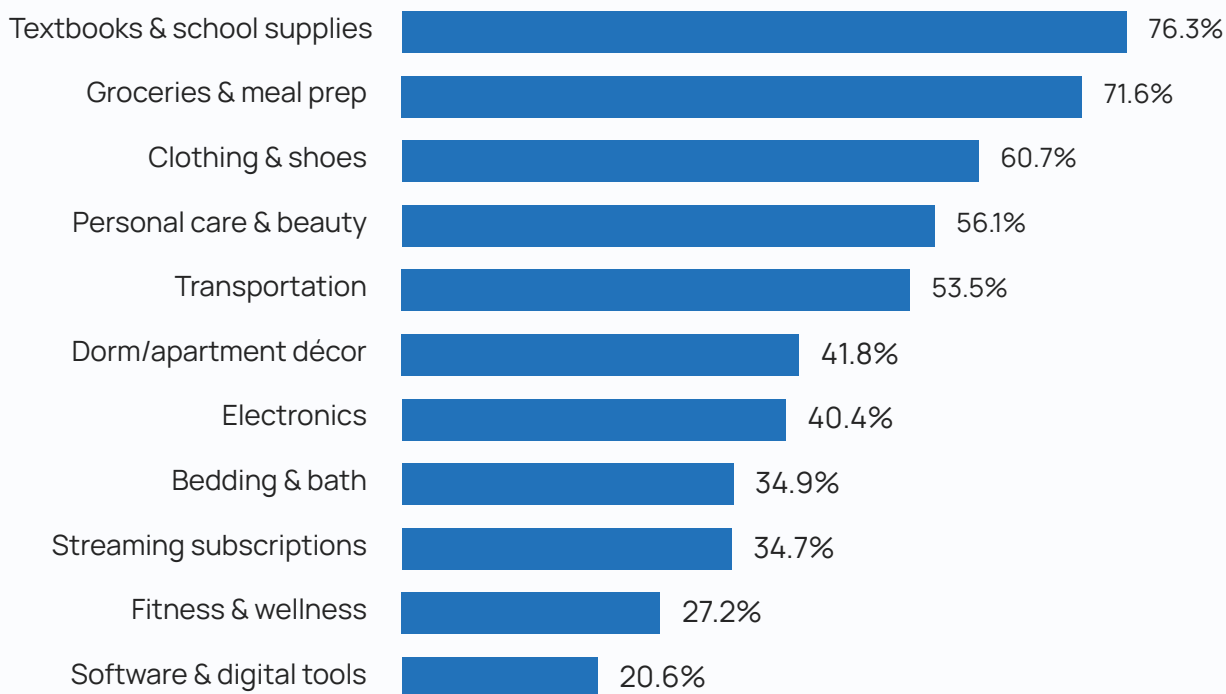
\$88.8B

total back-to-college spend (2025)

\$1,326

average per-student spend

Planned back-to-college spending categories



Source: flytedesk student research, 2026

Three buying windows, not one

Back-to-college is not a single shopping season. flytedesk data identifies three distinct buying windows: before arrival, campus move-in, and the first weeks of class. Each window requires a different media approach, and campaigns that treat the season as a single moment leave significant spend unaccounted for.

The post-arrival window is especially active and often underestimated. Prior flytedesk research among incoming first-year students found that 99% make a trip for core back-to-school items after move-in; 92% buy groceries, 48% buy hygiene products, and 42% buy school supplies after move-in.

59.5% of students say they pay for most of their back-to-college purchases themselves, compared with 34.1% who rely primarily on parents or guardians, a share that increases as students get older.

99%

of students buy back-to-school items after move-in.

Back-to-college buying windows

Pre-arrival

Students make purchases for known needs before they leave home.

Top purchase categories

- 55%** Electronics
- 53%** Clothing & shoes
- 47%** Bedding & bath
- 41%** Dorm furnishings

Campus move-in

Students solve immediate needs as they get situated on campus.

Top purchase categories

- 40%** Groceries
- 21%** Personal care
- 15%** Bedding & bath
- 12%** Dorm add-ons

First weeks of class

Students keep buying as classes begin and daily routines take shape.

Top purchase categories

- 47%** Textbooks & supplies
- 29%** Software / digital tools
- 24%** Groceries
- 17%** Personal care

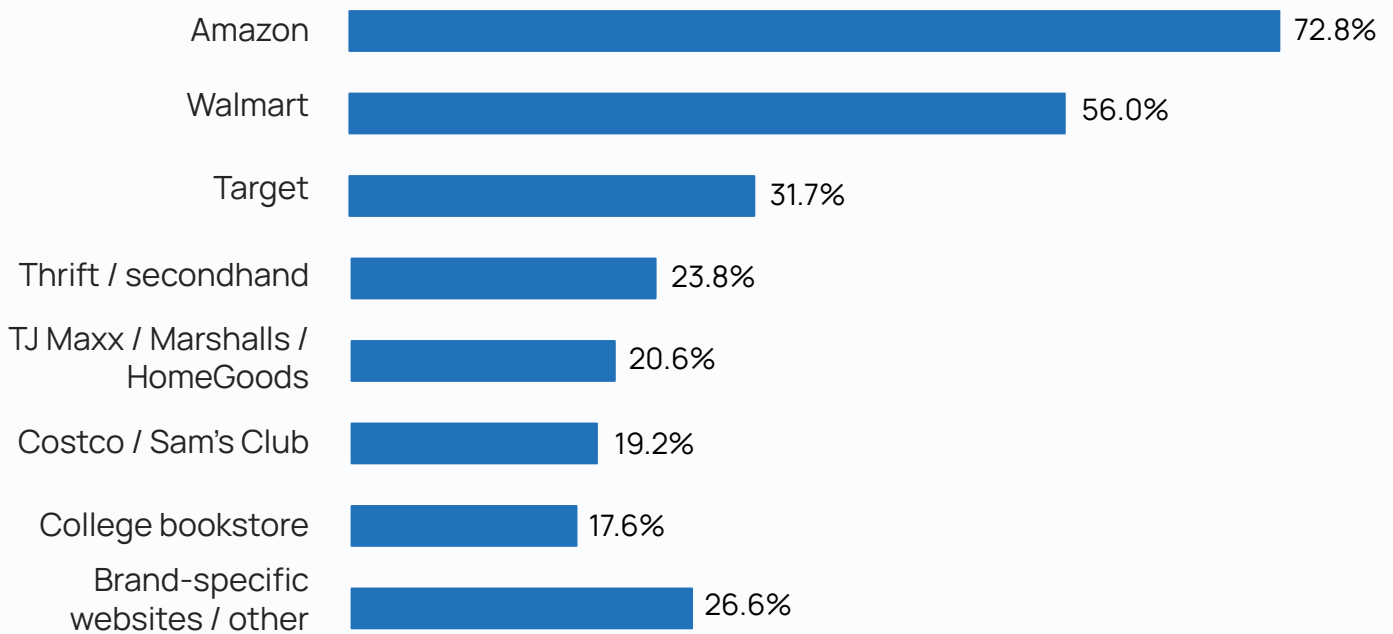
Source: flytedesk student research, 2025 and 2026

Where back-to-college spend happens

Students' go-to retailers are practical and high-convenience. Amazon leads by a wide margin, with 72.8% naming it among their top-three back-to-college shopping destinations, followed by Walmart at 56% and Target at 31.7%.

Amazon's position at the top of the overall retailer ranking is real, but it understates how deliberately students route between stores by category.

Amazon, Walmart lead back-to-college shopping



Amazon

- 45%** Home & dorm decor
- 39%** Storage / organization
- 36%** Electronics

Target

- 39%** Hygiene & beauty
- 33%** Bedding & towels
- 24%** Home & dorm decor

Walmart

- 43%** Groceries
- 39%** School / office supplies
- 27%** Hygiene & beauty

Source: flytedesk student research, 2026

What actually drives the purchase

When asked what drives their purchases, students name quality, cost, and aesthetics as primary considerations, but the weighting shifts significantly by category. Notably, groceries are the only category where more than 50% of students ranked cost as the primary purchase driver.

Brand name ranks last or near-last across every category in stated preferences, yet flytedesk research consistently finds that students buy the brands they believe their peers are already using.

This gap between stated and revealed preference is examined in detail on page 20.

Groceries

are the only category where more than 50% of students name cost as the primary driver.

Student purchase drivers by category

	Quality	Cost	Aesthetics	Brand name
Personal care	53%	27%	5%	7%
Electronics	53%	22%	3%	15%
Cleaning supplies	41%	45%	2%	6%
Groceries	28%	62%	1%	2%
Clothing	24%	31%	34%	4%
Dorm essentials	16%	41%	36%	1%

Source: flytedesk student research, 2026



Section 2

Who is the 2026 student?

Demographics, motivations, campus life, and what brands need to understand about this cohort

Student population snapshot

The U.S. college student population is large, diverse, and nationally distributed. Of the 16.8 million undergraduates enrolled nationally, 76.5% attend public institutions and 69.6% attend four-year schools (IPEDS Fall 2024 provisional data). 27% of first-time students arrive from out of state, leaving established peer networks and brand loyalties for a campus environment where new preferences are actively forming.

Nearly half (47%) took out student loans to finance their education, with an average of \$29,560 borrowed among those who did, down from \$35,600 a decade earlier in real terms (College Board, Trends in Student Aid, 2025). 25.8% are first-generation students (Postsecondary National Policy Institute, 2025), meaning many are navigating purchasing decisions that their family networks cannot fully inform.

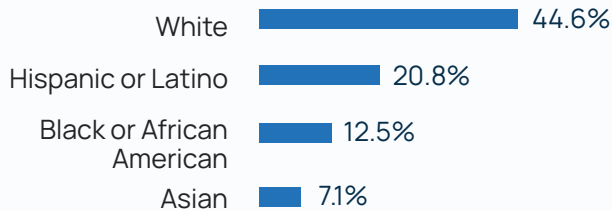


Demographics

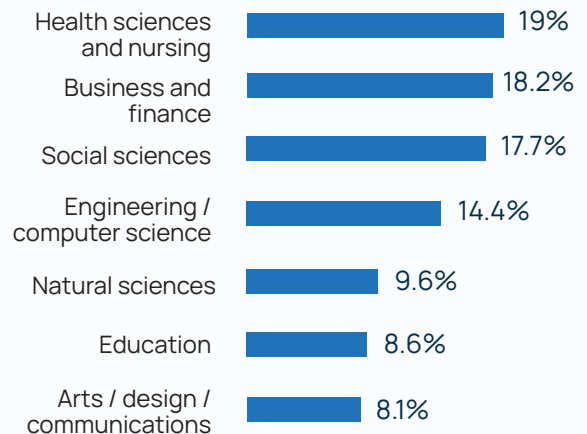
Gender

57.7% women | **42.3%** men

Race and ethnicity



Top majors in our survey



16.8M undergraduates nationally

69.6% attend four-year schools

25.8% first-generation college students

Sources: IPEDS Fall 2024 provisional data; IIE Open Doors 2025; College Board, Beyond Your Campus, 2024; Postsecondary National Policy Institute, First Generation Students in Higher Education, 2025; College Board, Trends in Student Aid, 2025; flytedesk student research, 2026

Under pressure, but looking ahead

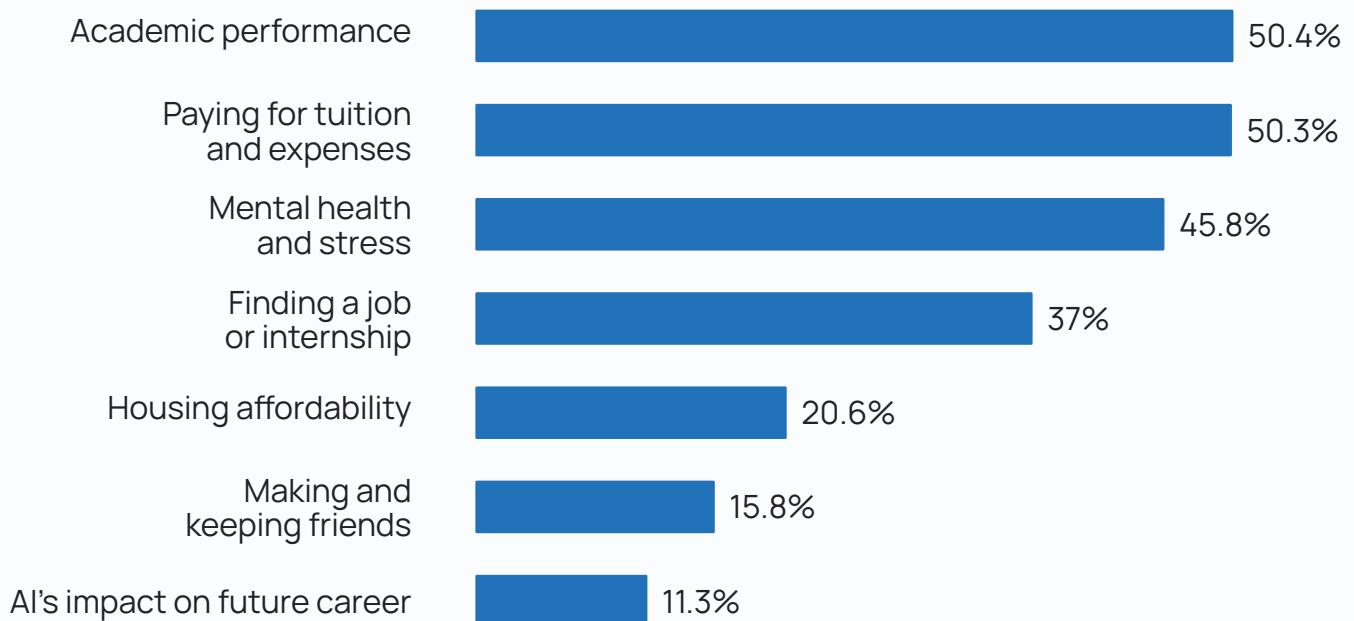
Students' top concerns are practical: academic performance (50.4%) and paying for tuition and expenses (50.3%) are nearly tied at the top, followed by mental health and stress (45.8%) and finding a job or internship (37%). Housing affordability is a growing concern at 20.6%.

Despite this pressure, students are forward-looking. 82% say they are in college primarily to build career skills, and 54% are optimistic about their financial future. AI's impact on career prospects ranks comparatively low (11.3%) among stated concerns – not because students are unconcerned about AI, but because immediate financial and academic pressures dominate.

54%

of students feel optimistic about their financial future.

Students' top stressors, ranked



Source: flytedesk student research, 2026

Solid financial basics, uneven financial confidence

The stereotype of the financially careless student is not supported by the data.

Most students hold foundational accounts: 88% have a checking account, 71% a savings account, and 52% a credit card. Among cardholders, building credit, not gaining rewards or spending power, was the primary reason for applying, cited by 70%. Among non-cardholders, building credit history is also the strongest stated motivator to apply (51%).

Interest in investing is high: 40% want to start investing or invest more. But confidence is low: only 15% feel well-informed enough to act. The top barriers are lack of funds (39%), feeling intimidated (33%), and fear of loss (24%). Men are three times more likely than women to have a brokerage or cryptocurrency account, a gap that presents an audience-specific opportunity for financial brands.

Financial literacy still largely happens at home: 58% of students get most of their financial advice from parents, followed by social media (29%), friends (20%), and school resources (20%).

52%

of students own a credit card, mostly to build credit history.

Students are high interest, low confidence investors

40%

want to start investing or invest more

15%

feel well-informed about investing

Men are 3x more likely

than women to own a cryptocurrency or brokerage account

Values-aligned, but not values-driven

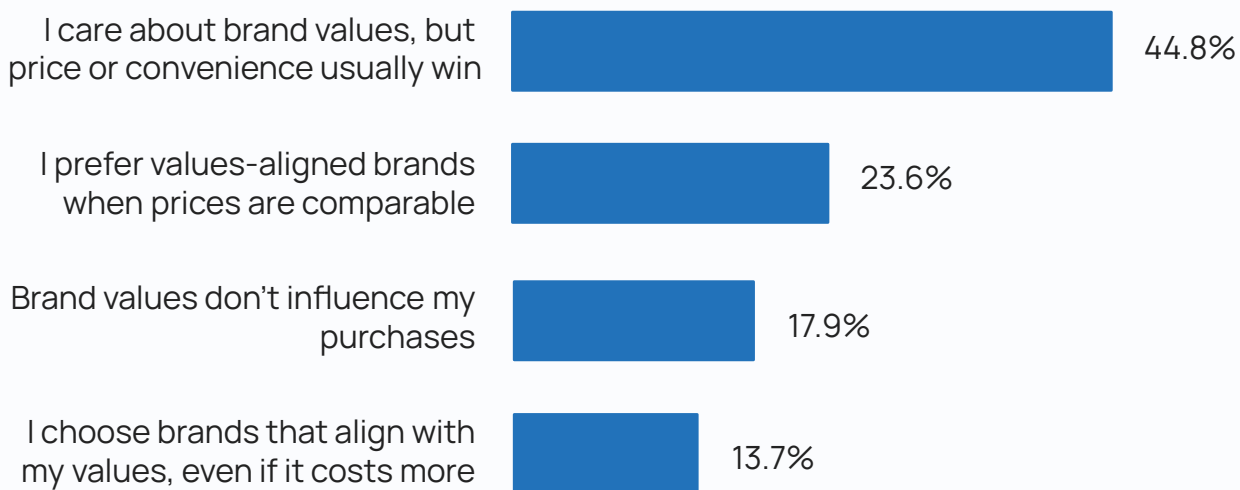
82% of students prefer brands that align with their values, but values are rarely the deciding factor at the point of purchase. The dominant pattern is pragmatic: students prefer values-aligned brands when tradeoffs are minimal, but default to price and convenience when forced to choose. These findings are in line with broader cost sensitivity in younger generations – PwC (2025) found that 79% of Gen Z shoppers now wait for products to go on sale, and 82% plan to buy less expensive alternatives to preferred brands.

A minority are genuinely values-driven shoppers: 14% say they are willing to pay more for values-aligned brands, and 22% have boycotted a brand in the past six months. In open-ended survey responses, students most often named high-visibility mainstream brands such as Target, Starbucks, Amazon, and Walmart, with boycotts tied to both values- and politics-linked narratives.

44.8%

of students say price or convenience usually wins over brand values.

Brand values are more often a tie-breaker than a purchase driver



Source: flytedesk student research, 2026

In-person shopping remains dominant

Students still buy essentials mostly in person. Over the past 90 days, 92% purchased groceries in person, 84% bought personal care or beauty products in person, and 78% bought clothing in person. But students are not single-channel shoppers. They move fluidly between in-store, e-commerce, pickup, and delivery depending on category and context.

Women are more likely than men to use multiple shopping methods, particularly for personal care, beauty, and grocery pickup. For clothing specifically, e-commerce is significant for both genders: 64.7% of women and 54.1% of men made clothing purchases online in the past 90 days. These findings indicate that in-person shopping dominates, but students still expect omnichannel convenience from retailers.



How students shopped in the last 90 days

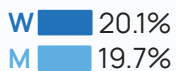
▲ Women ▲ Men

Food & groceries

In-person



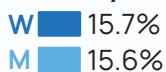
E-commerce



Pickup



Delivery

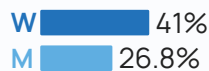


Personal care & beauty

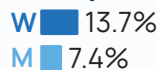
In-person



E-commerce



Pickup



Delivery



Clothing & accessories

In-person



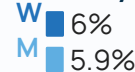
E-commerce



Pickup



Delivery



Source: flytedesk student research, 2026

High AI adoption, growing AI anxiety

84% of students regularly use AI tools. The most common use cases are studying (67%), shopping assistance (55%), and writing assistance (54%). 40% use AI for shopping at least once a month, and 55% use it at least a few times per year.

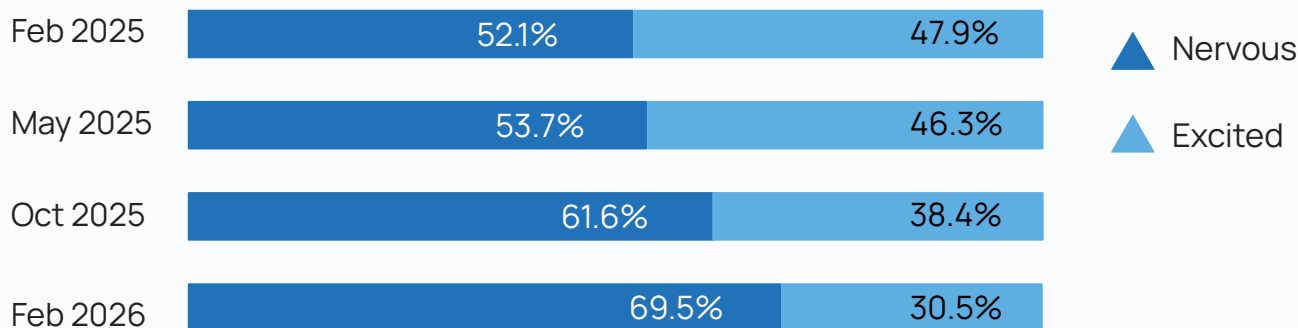
But adoption does not equal confidence. Among students who use AI for shopping, 87% report concerns about inaccuracy, bias, or loss of decision-making control. And the broader sentiment trend is moving in a negative direction: students' anxiety about AI's implications has risen from 52% in February 2025 to 69.5% in February 2026, a 17-point shift over 12 months.

This anxiety gap matters for brands. IAB research (2026) found that advertising executives are substantially more optimistic about Gen Z's acceptance of AI-generated advertising than Gen Z consumers are themselves. AI may surface product options, but purchase decisions still depend on the underlying factors that have always driven them: value, quality, peer validation, and trust.

55%

of students use AI to help them shop at least a few times per year.

Student AI sentiment change over time



Source: flytedesk student research, 2026

Student life happens on campus, not online

Campus life is defined by routines, not big social events. Students go to class, work jobs, join clubs, eat with roommates, exercise, and study. They move through the same physical spaces week after week, and 80% say they find community on campus, not online.

This preference for in-person community shows up in how students spend their free time. When asked to rank their interests and hobbies, social media content creation ranked last out of fifteen options, chosen by just 11.8% of students. Harris Poll (2024) research confirms the same tension: 83% of Gen Z adults have taken steps to limit their social media use, and 82% associate social media with the word “addicting.”

Students are digitally fluent, but they make memories and decisions in real life, in the context of the campus community.

80%

of students find community on campus, not online.

Top interests & hobbies

Music	63.5%
Fitness	46.5%
Outdoor activities	45.5%
Gaming	43.0%
Food / cooking	33.9%
Reading / podcasts	33.5%
Travel	32.8%

Routines create daily peer contact



11.8% rank social media content creation as an interest – last of 15 options

83% of Gen Z adults have taken steps to limit social media

Sources: Harris Poll, 2024; flytedesk student research, 2026



Section 3

The campus perception engine

How campus density shapes brand perception — and why brands that appear popular become popular

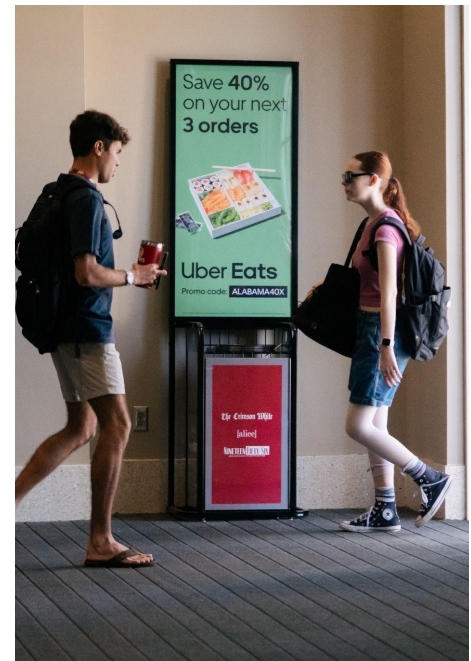
Why peer signals hit differently on campus

Students look to each other to understand what matters on campus. They notice what their peers carry, wear, use, order, and treat as normal. 82% of students trust recommendations from peers over advertising; 59% buy the same brands their friends use.

This dynamic is well-established in social psychology. A meta-analysis of 250 studies covering more than 112,000 respondents found that perceived social norms – beliefs about what is normal or popular – had a stronger effect on behavior than any other social signal (Melnyk, Carrillat & Melnyk, *Journal of Marketing*, 2022). What distinguishes the campus environment is the density and repetition of these peer signals. Students encounter the same people, in the same places, over and over again, turning incidental observation into durable social evidence.

Campus density also amplifies the recall effects of advertising itself. Research on co-viewing finds that people remember brands better when they encounter them alongside friends in interactive social settings, and physical media tends to produce stronger recall than digital formats (Coker & Altobello, *Journal of Business Research*, 2018; Solomon Partners / OAAA Benchmark Report, 2023). On a college campus, these conditions – peer presence, physical media, shared space—overlap routinely.

The result is that brand recognition on campus is less about familiarity and more about social proof. Students buy the brands they believe their peers are already using.



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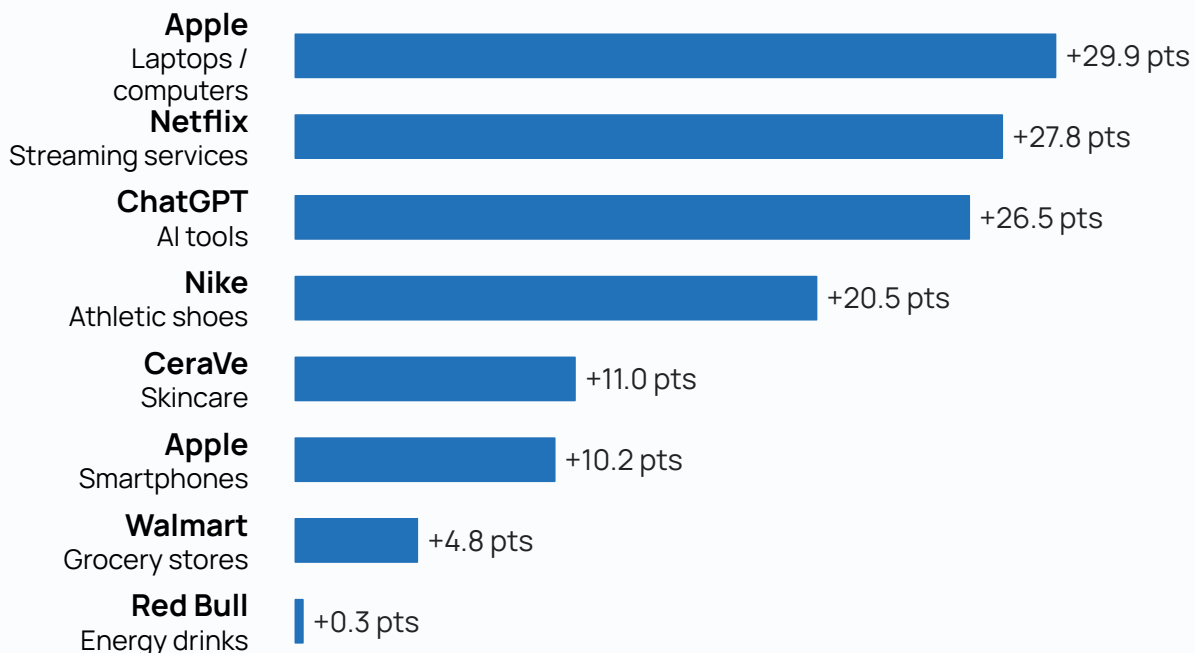
Perceived campus dominance often diverges from actual purchases

To measure how peer perception operates on campus, flytedesk conducted a simulated purchase test across nine product categories. For each category, students were asked two questions: which brand they purchased most recently, and which brand they believe is most popular among students on their campus.

Across nearly every category, a gap emerged between actual purchasing behavior and perceived popularity. Students consistently overestimated the presence of the leading brand, sometimes by substantial margins. The pattern reveals that students don't just notice brands on campus; they form beliefs about which brands dominate. Those beliefs diverge from actual purchasing behavior in a predictable direction. This is the perception premium: the degree to which social proof inflates a brand's apparent campus position relative to its actual position.

Students don't just notice brands on campus – they form beliefs about which brands dominate. Those beliefs and reality often diverge.

Difference between actual purchases and perceived campus popularity



Source: flytedesk simulated purchase study, 2026

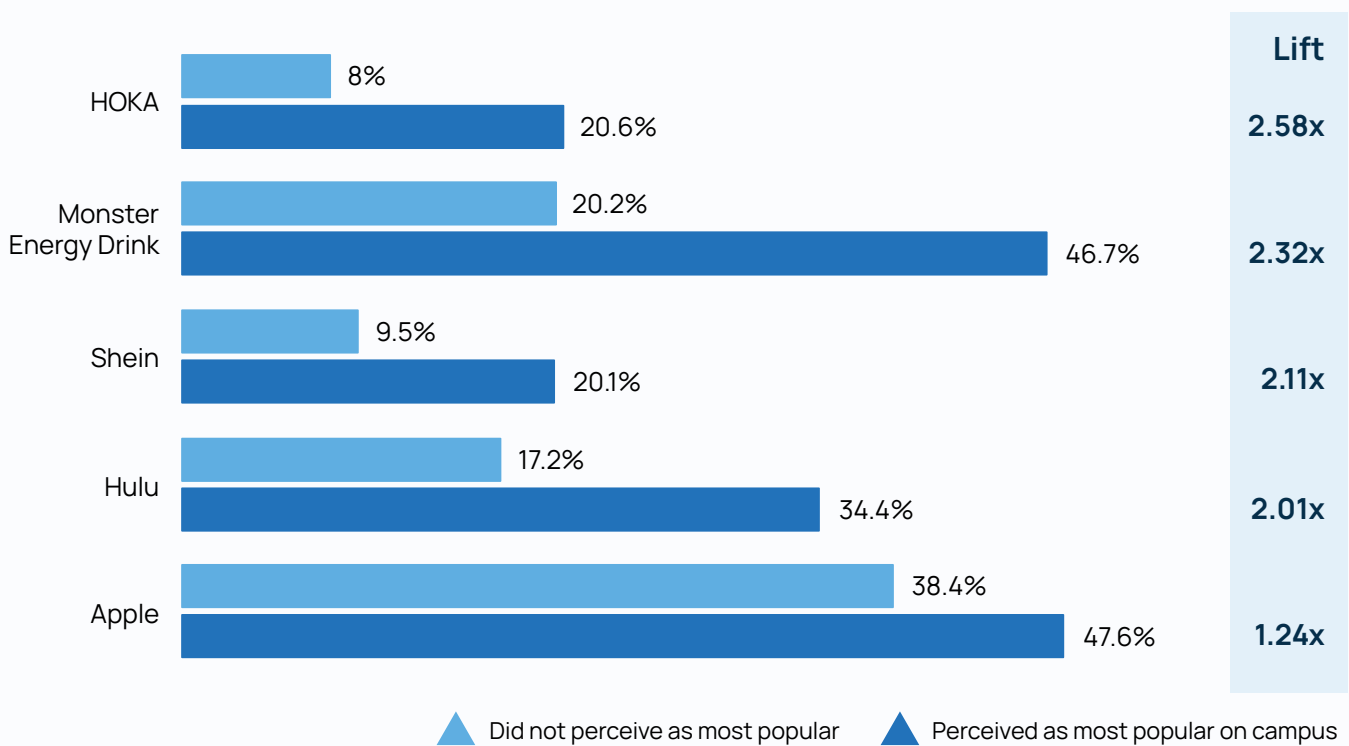
Students are up to 2.6x more likely to buy brands they believe are dominant

A within-respondent analysis of the shelf simulator data shows that when a student believed a brand was the most popular on their campus, they were between 1.2 and 2.6x more likely to have actually purchased that brand, compared to students who held a different perception. The pattern holds across categories.

Students who perceived HOKA as the leading campus shoe brand were 2.6x more likely to have bought HOKA. Those who perceived Monster as the dominant energy drink were 2.3x more likely to have purchased it. Shein perceivers in everyday clothing were twice as likely to buy Shein; Hulu perceivers were twice as likely to subscribe. Even for Apple, where actual purchase share is already high, students who named Apple as the campus standard were 24% more likely to have bought an Apple product.

Across every category we tested, students who believed a brand was popular on campus were more likely to have purchased it.

Purchase rate by whether a student perceived a brand as popular



Source: flytedesk simulated purchase study, 2026

This means the perception gap outlined on page 20 carries real stakes. Brands overrepresented in campus perception hold a purchase advantage that exceeds their actual share. Brands underrepresented in campus perception leave that advantage on the table.

The perception gap has two sides

For dominant brands, the perception premium is an asset to protect. Students calibrate their sense of what is popular from what they see around them, which means campus visibility helps sustain the belief that a leader is still the leader. When a brand goes quiet on campus, it leaves that social proof open to whoever shows up next.

For challengers, the same gap creates an opening. If students believe a category is more settled than it actually is, the competitive landscape is more accessible than it appears. Campus visibility gives challengers a way to change the perceived norm. The mechanism is presence, not persuasion.

This dynamic is not unique to campus, but the close-knit campus environment makes it more powerful. In an open geography, repeated media exposure can fade into the background. In a bounded community where students move through the same spaces every day, visibility becomes the most meaningful social signal.



In a bounded community where students move through the same spaces every day, visibility becomes the most meaningful social signal.

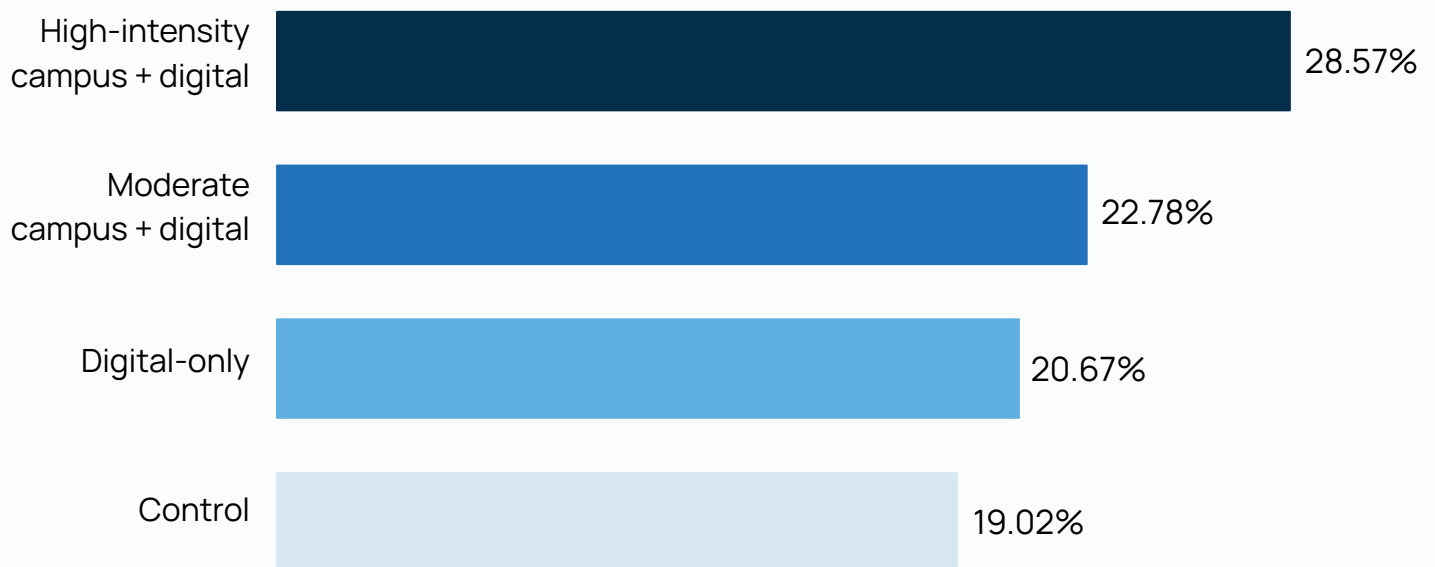
Campus media as a force multiplier: A matched-market experiment

To quantify the effect of campus media on behavioral outcomes, flytedesk ran a matched-market experiment for a popular education app during the back-to-college period. Campuses were assigned to four conditions: high-intensity campus media plus digital, moderate campus media plus digital, digital-only, and no paid media.

High-intensity campus media combined with digital produced 38% higher app usage than digital alone. Perceived peer adoption moved in the same direction: as campus visibility increased, students at targeted campuses became more likely to believe the product was popular among their classmates. Campus media changed both what students did and what they believed their peers were doing, which, in a peer-driven purchase environment, are self-reinforcing outcomes.

Students at campuses with high-saturation media coverage were **38% more likely** to report recent product usage than students reached through digital advertising alone.

High-intensity campus media saturation led to higher usage



Source: flytedesk matched-market experiment, 2023

Case study: From challenger to contender in AI

A campaign by a challenger AI brand illustrates how campus visibility translates into market position change. In June 2025, fewer than 5% of students named the brand as their primary AI tool. By April 2026, following a sustained campus media program reaching 2.6 million students across 96 campuses, that figure had nearly tripled.

Compared with control campuses, students at targeted campuses were 27% more likely to know about the brand's student plan, 22% more likely to have used the AI tool in the past 30 days, and 20% more likely to say they would use the tool in the future.

The results show how campus visibility can make a meaningful difference in a challenger brand's market position.

In June 2025, fewer than 5% of students named the brand as their primary AI tool. By April 2026, following a sustained campus media program, that number had tripled.

Brand lift results: Exposed vs. control campuses

27%

more likely to know about the brand's AI student plan

22%

more likely to have used the brand's AI tool in the past 30 days

20%

More likely to use the brand's AI tool in the future

Source: flytedesk matched-market study, 2025



Section 4

How to build a winning back-to-college campaign

Real strategies from real campaigns

From reach to saturation

Traditional media planning centers on reach: the number of unique individuals exposed at least once. On campus, reach is necessary but insufficient. The characteristics of the campus environment — fixed geography, persistent physical formats, and co-present audiences — shift the central planning question from exposure to saturation: whether a campaign achieves enough presence to become recognizable within the community.

Below a saturation threshold, media may reach students without becoming salient. Even frequent exposures can fail to register in a high-volume, platform-mediated environment. Above the saturation threshold, messages begin to feel familiar, legitimate, and socially visible. Three principles follow from this distinction.

Above the saturation threshold, messages begin to feel familiar, legitimate, and socially visible.

Three principles for campus media planning

1 Concentration matters.

Dispersing limited budgets across too many campuses results in underpowered programs that technically reach students without establishing presence.

2 Physical media primes action.

Physical formats like OOH, posters, flyers, and print are signal-setters that establish legitimacy and social visibility in ways that digital formats, encountered within a curated feed, typically cannot. Solomon Partners / OAAA (2023) found that OOH formats produce roughly 84–86% consumer ad recall, roughly double the rates observed for social advertising.

3 Time compounds exposure.

Sustained presence over multiple weeks is qualitatively different from short bursts at identical spend levels. A message encountered day after day, in the same spaces and with the same peers, builds more salience than equivalent impressions scattered across a feed.

Segment your campus list for performance, not just reach

Most brands segment campus lists on size, state, and school type. These criteria optimize for reach. They do not optimize for performance.

The campuses where a campaign is most likely to succeed are defined by conditions specific to the brand, the category, and the campaign goal. These factors measurably affect campaign performance:



Key campus segmentation criteria

- 1 Geography**

Retail locations, competitors, and relevant services affect whether students can act on a message. The same creative performs differently depending on what is a short walk away.
- 2 Academic calendar**

Move-in dates and class starts vary by school. A single launch date can hit one campus at move-in and another weeks into the semester.
- 3 Competitor presence**

Existing brand relationships change the competitive context.
- 4 Athletic calendar**

Home game schedules, rivalry weeks, and championship seasons create predictable high-traffic moments that affect both student attention and campus foot traffic patterns.
- 5 Student body makeup**

Major concentration, household income, debt levels, housing availability, and demographic characteristics all affect message fit.
- 6 Campus culture & traditions**

School-specific events, traditions, and cultural moments vary significantly by campus and can affect how and when students are most reachable.

Build your media plan for concentration, not just presence

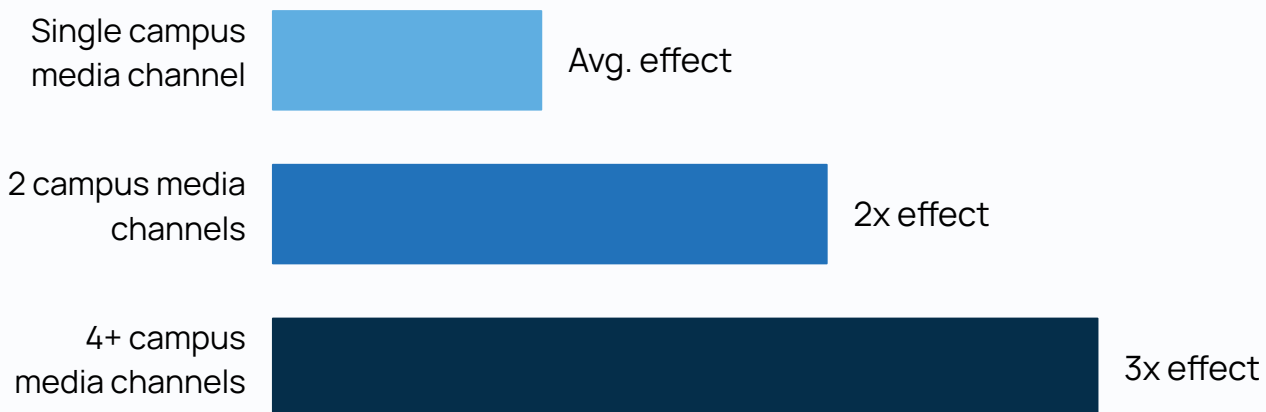
Campus media works best when concentrated enough to be noticed and sustained long enough to become familiar. The goal is not to appear on as many campuses as possible, but to achieve sufficient saturation on the right campuses that students encounter the brand repeatedly across their normal daily routines.

A high-intensity presence on fewer campuses will consistently outperform a moderate presence across a longer list. Below a saturation threshold, a campaign may be technically live without being visible enough to enter the campus narrative.

Campus media also reaches students where social media doesn't – in the physical spaces they move through every day. That creates a multiplying effect: each channel reinforces the others, and the lift compounds as more touchpoints are added.

Campus media reaches students where social media doesn't, creating a multiplying effect that **increases with each additional media channel.**

Impact multiplies with each additional media channel



Source: flytedesk matched-market study, 2025

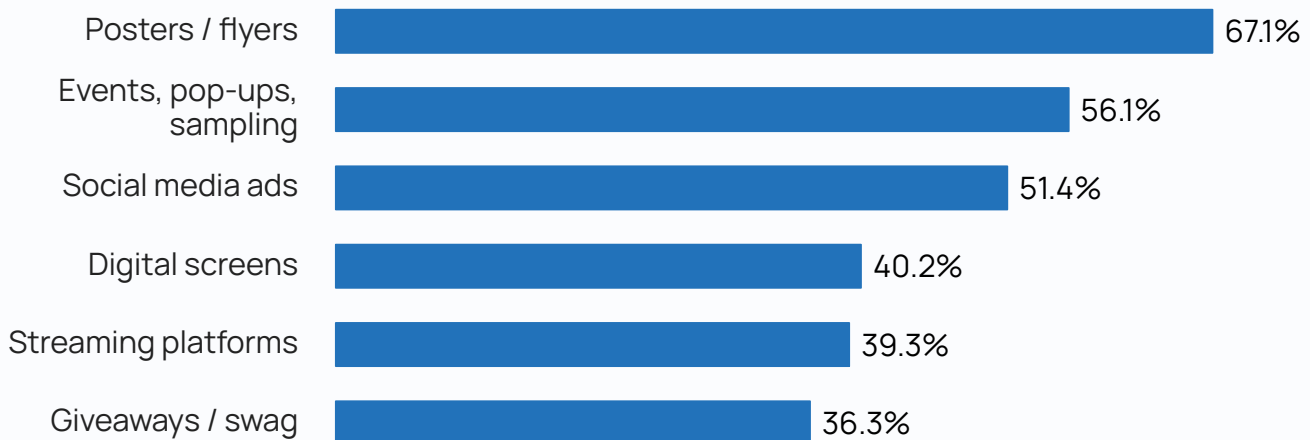
A student who encounters a brand on a transit panel, a bulletin board, and a poster in the dining hall is not just reached three times. They are reached in three different contexts alongside peers, which amplifies recognition in ways that reach alone cannot explain.

Ad recall data supports this. 93% of students recall seeing campus advertising in the past month – substantially higher than typical recall for social or digital advertising. Posters and flyers lead in recall (67.1%), followed by events, pop-ups, and sampling activations (56.1%). The formats students remember most are the ones they encounter in shared physical spaces alongside peers.

93%

of students recall seeing campus advertising in the past month.

Student ad recall on or near campus in the past month



Source: flytedesk student research, 2026

Match the campaign to the buying window

The back-to-college planning calendar has two phases: campaign planning and student buying.

Campaign planning should begin in March and run through mid-July. Creative development, campus selection, and measurement setup are March-to-May activities; production and logistics extend through June. Student buying unfolds from July through October, with peak activity concentrated in August and September around move-in and the first weeks of class.

Move-in dates vary by up to six weeks across the country, so campaign activation should follow campus-specific academic calendars, not a single national launch date.

Campus activations should follow **campus-specific academic calendars, not a single national launch date.**

Back-to-college planning calendar

▲ Planning Stage

▲ Milestone Event

Timeline	July	August	September	October
Pre-arrival shopping Build awareness before students arrive	▲ Planning Stage		▲ Milestone Event New student Welcome Week	
Move-in & campus arrival Own the moment with campus saturation	▲ Planning Stage		▲ Milestone Event Campus move-in	
First weeks of class Build familiarity with continued presence		▲ Planning Stage	▲ Milestone Event Classes start	
Early-semester routines Reinforce relevance as habits solidify			▲ Planning Stage	▲ Milestone Event New habits forming

Pair student discounts with campus media

70% of students have redeemed a student discount this year—but they rarely search for them. Most discovery happens passively: word-of-mouth from friends (36%), noticing a discount at checkout (27%), or encountering an offer in the path of a purchase already underway. Only 14% search for a discount before purchasing.

flytedesk analyzed campuses where student discounts were paired with top-of-funnel campus media. Targeted campuses saw 63% higher redemption rates than controls, with no drop-off from repeat exposure. A separate A/B test found that college-exclusive framing increased redemption likelihood by 9% compared with generic discount framing.

Campus media extends the reach of other investments as well.

College sports sponsorships concentrate visibility around a handful of high-attendance moments. Surround sound campus media distributes that presence across the rest of student life and, as the matched market experiment shows, amplifies the effectiveness of every other channel.

Social media advertising also benefits from the familiarity campus media establishes. Research from OAAA and The Harris Poll (2024) finds that OOH advertising makes consumers significantly more likely to engage with a brand online — 52% say physical ads increase their likelihood of engaging with the same brand in a digital feed. A brand students have already seen around campus has a better chance of feeling relevant when it shows up in a social feed.



63%

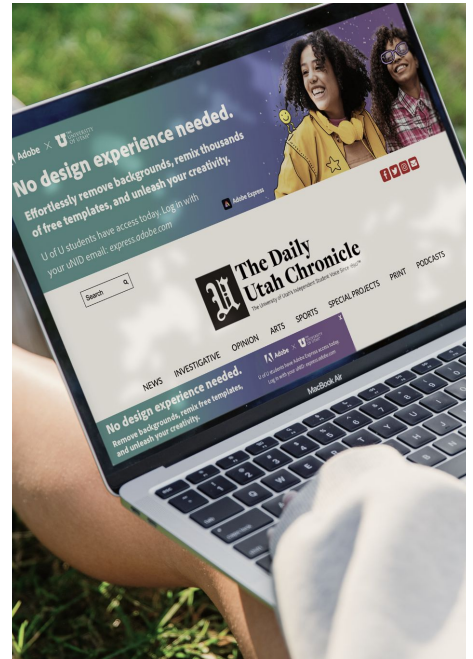
higher redemption rates when brands paired student discount promotions with campus media support.

Build a measurement plan before the campaign launches

A back-to-college measurement plan should answer three questions: Did students notice the brand on campus (awareness, recall, familiarity)? Did it change student perceptions (preference, perceived popularity, favorability)? Did the campaign change behavior (usage, trials, purchases, redemptions)?

flytedesk uses matched-market measurement for campaign evaluation: comparable campuses are assigned to treatment and control groups before a campaign launches, and outcomes are measured across all three levels after it ends. All case study results in this report are derived from that methodology. Message testing can be layered into the same framework – running different creative or offer framings across campus cohorts before scaling one approach more broadly.

The findings compound over time. Each study builds a more precise picture of which campuses, formats, and timing windows produce results for a specific brand in a specific category.



Three questions that guide campaign measurement

1 Did students notice the brand on campus?

Measure:
Awareness, recall, and familiarity.

2 Did the campaign change student perceptions?

Measure:
Preference, perceived popularity, favorability

3 Did the campaign change student behavior?

Measure:
Usage, trials, purchases, redemptions

Evidence from the field

The principles above are not theoretical. Across categories, campus media performs best when it is concentrated, visible, and timed to the moments when students are forming habits or making decisions. The following case studies show how that plays out in practice.

Defending relevance in a changing category

A leading search brand used campus media to defend relevance as students increasingly turn to AI tools and social platforms for discovery. To showcase the brand's evolving AI capabilities and reinforce its search product as a trusted tool, flytedesk ran a four-week campus campaign across 30 schools, reaching 902,000+ students and delivering 124 million+ impressions through high-visibility campus media.

The campaign produced measurable lift across awareness, usage, and future intent. Most notably, excitement about the brand's products and features rose at targeted campuses while declining among controls – a reversal that points to campus media's role in shifting sentiment, not just awareness.

Excitement about the brand rose at targeted campuses while declining among controls, showing that campus media shifted sentiment, not just awareness.

Brand lift results: Exposed vs. control campuses

21%

more likely to have used the brand in the past 30 days

39%

more likely to use the brand in the future

54%

increase in excitement about the brand's products and features

Source: flytedesk matched-market study, 2025

Converting demand in a competitive student market

A major food delivery app used campus media to challenge a competitor's first-mover advantage in student food delivery. To break entrenched delivery habits and regain momentum on campus, flytedesk blanketed 35 campuses with a surround-sound media mix reaching over 1.2 million students.

Compared to control campuses, students at targeted campuses were:

- 28% more likely to consider using the app
- 31.4% more likely to redeem a promo code.
- 50% more likely to name the app as their preferred food delivery app

The campaign resulted in over 200,000 student redemptions and achieved 2.14 ROAS. The app also beat its competitor in campus market share for the first time.

The campaign resulted in over **200,000 student redemptions**, achieved **2.14 ROAS**, and beat its competitor in market share for the first time.

Campus results vs. control results

28%

more likely to consider using the app

31.4%

more likely to redeem a promo code

50%

more likely to name the app as their preferred food delivery app

Source: flytedesk matched-market study, 2024-2025

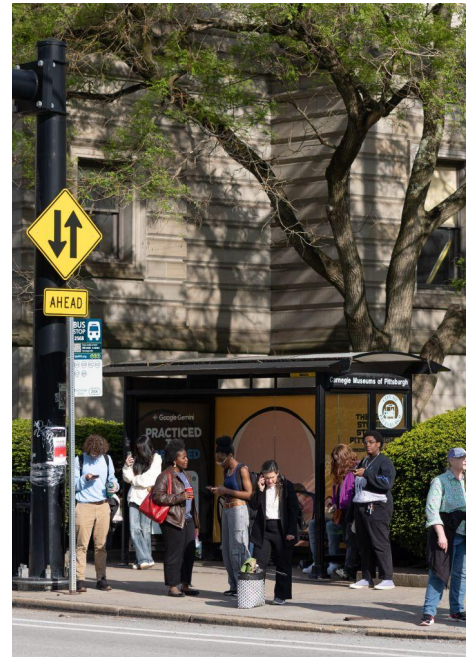
College is a moment, not a monolith

College is one of the only experiences in American life that concentrates millions of people of the same age, in the same place, moving through the same transitions at the same time. Students are forming habits, building peer networks, and deciding which brands belong in their lives. They buy what they believe their peers are buying. Those beliefs form in the shared space of campus life.

The research in this report makes three things clear. First, the back-to-college market is larger, more segmented, and more behaviorally complex than a single season implies. Second, peer perception is not a soft marketing concept; it is a measurable, quantifiable force with documented effects on purchase behavior. Third, campus media measurably shapes the social environment in which purchase decisions are made.

The brands that win on campus recognize that college is not a monolith. It is a rare moment when physical proximity, new routines, and peer influence combine to make students uniquely reachable. Campus is one of the few media environments where "surround sound" advertising is operationally achievable, not merely aspirational.

The window opens every August. The question is whether the brand is there.



Campus is one of the few media environments where "surround sound" advertising is operationally achievable, not merely aspirational.

About flytedesk

flytedesk is the software that colleges use to manage ads, media, and sponsorships on campus. Our platform gives brands access to all of college life in one place: 2,300 campuses, 19 million students, 586,000 unique ad placements, and 4.4 billion monthly impressions, available through a single platform and one transaction.

flytedesk also runs the largest college insights engine in the country, surveying thousands of students weekly to understand how they think, buy, and engage, providing a real-data foundation for every campaign decision. Every campaign includes a proof-of-placement report and, where appropriate, a controlled brand lift study of the kind used to measure the campaigns described in this report.



Campus media planning framework

flytedesk's approach to campus planning is grounded in a saturation-based model that evaluates campaigns not channel by channel, but in aggregate across the campus environment. The central question is not how many impressions a plan delivers, but whether it achieves sufficient presence – across formats, time, and physical space – to become recognizable within the campus community.

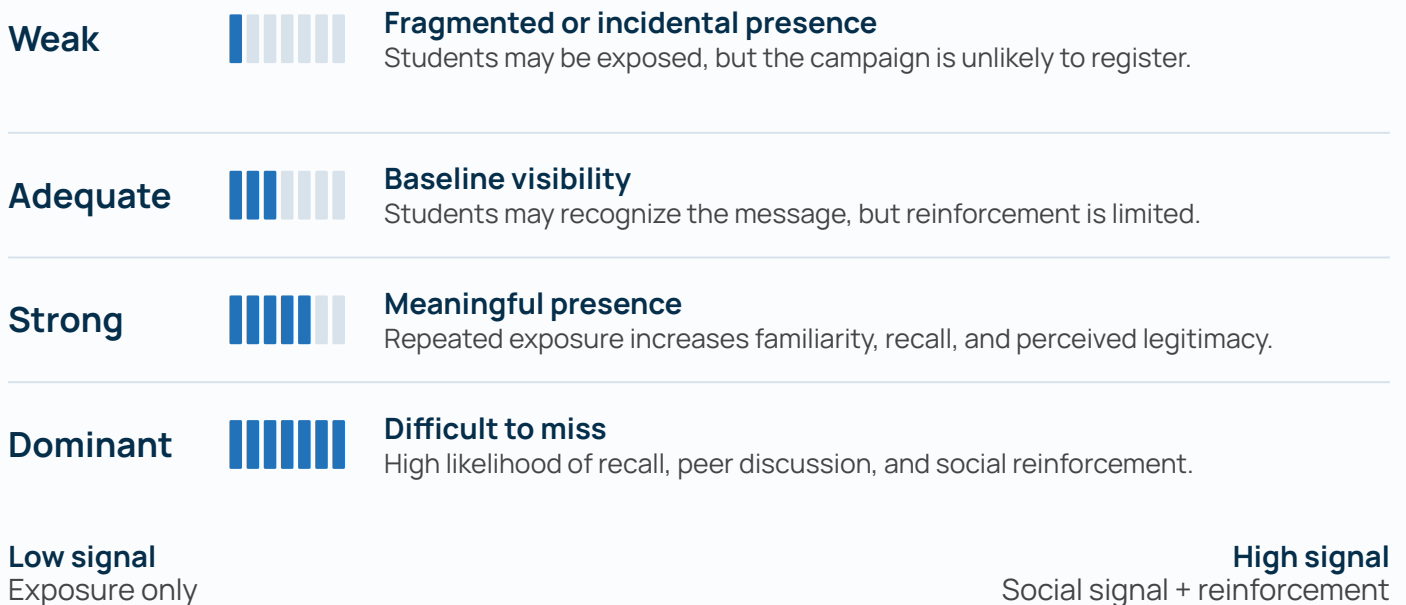
This framework recognizes that campus media formats differ not only in audience size, but in the quality of exposure they generate. Physical formats (out-of-home, posters, print) function as environmental signals received by students as part of the campus landscape. Digital formats (campus email, college news sites, SMS) operate at the level of individual relevance. Effective plans rely on both, with physical media typically establishing the foundation of visibility that makes other formats more effective.

Plan strength is evaluated along four dimensions: visual impact (how likely a format is to capture attention), invasiveness (how difficult it is for a student to bypass), persistence (whether students encounter the same message repeatedly over time), and social context (whether the format is typically encountered with peers or alone). Campaigns are assessed in aggregate against these dimensions to determine whether they are likely to achieve meaningful presence, adequate presence, strong presence, or dominant presence within a campus environment.

flytedesk's platform sorts more than 2,300 campuses by dozens of criteria and can build a segmented, saturation-calibrated campus plan in minutes.

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Salience and signal strength in campus media environments



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