

College 2025

How the COVID Generation shops,
spends, and connects with brands

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The COVID Generation Goes to College

Today's incoming college freshmen—often called the “COVID Generation”—entered adolescence in the shadow of a global pandemic. Their formative years were marked by school closures, social distancing, and a heavy reliance on screens for both learning and social interaction. Virtual classrooms and FaceTime hangouts became the norm, replacing daily hallway chatter, after-school clubs, and in-person rites of passage.

Now, as these students arrive on college campuses, a powerful shift is underway. After years of isolation and digital overload, this generation craves in-person connection, and they're actively seeking ways to build community on campus.

Simultaneously, students today are placing increased emphasis on wellness and the future. Mental health, physical wellbeing, and career planning are top priorities for this cohort—shaped in part by the challenges of the pandemic and the uncertainty that came with it.

To connect meaningfully with this generation, brands must recognize how deeply the pandemic shaped their values and needs. They aren't just looking for information or entertainment. They're looking for authentic connection and purpose. They may be digital natives, but they're forming communities and relationships in the real world. Meeting this generation where they are, both offline and online, will be key to earning their trust and loyalty in the years to come.

The COVID Generation At-a-Glance



Biggest Stressors

Career, Money, Classes



Biggest Passions

Music, Fitness, Travel



How They Find Community

Classes, Clubs, Roommates



Top Reasons to Attend College

Career, Personal Growth, Community



Biggest Causes

Mental Health, Reproductive Rights, Education

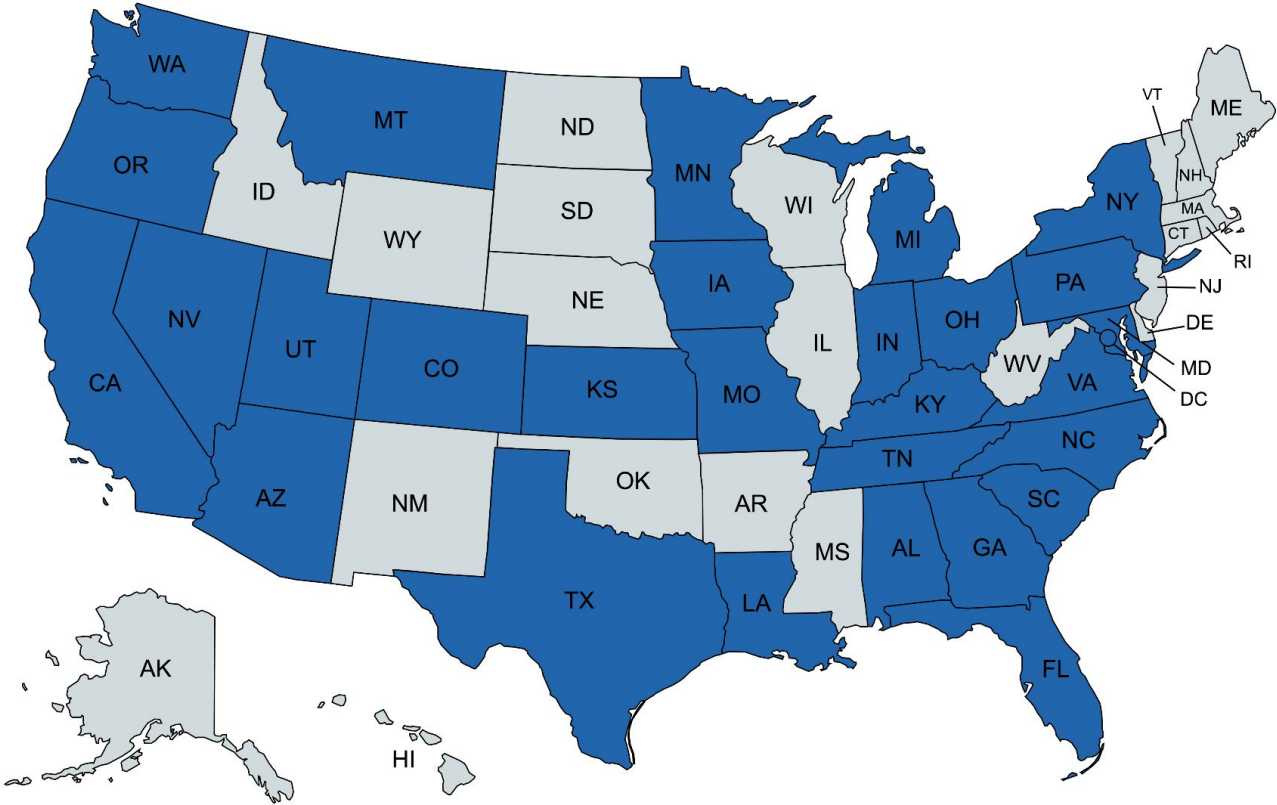


How They Find Brands

Friends, IRL Shopping, Social Media

Research Methodology

In February 2025, we surveyed **1,803 college students** about their hopes, challenges, motivations, and goals. The survey was conducted across **67 schools** in **29 states** across the continental United States.



→ **29**
States

→ **67**
Schools

→ **1,803**
Respondents



A Generation in Search of Belonging

Our research paints a nuanced picture of students' challenges and priorities, one that negates common stereotypes about the unmotivated, screen-addicted college student. In reality, this generation values real-life connections and yearns for a sense of community and belonging. Years of remote school taught them that they won't find lasting community online; instead, they're seeking it on campus.

This cohort views social connection as especially central to the college experience. In fact, 54% of students agree that finding community is one of the most important parts of college, ranking it even above academic goals.

**82% of
students find
community on
campus, not
online.**

Community Happens on Campus, not Online

Students have a strong preference for in-person interactions, with 82% saying they find community on campus rather than via social media. However, the path to connection isn't always smooth. Nearly half of students report struggling with loneliness on campus, suggesting a gap between their desire for community and their ability to find it.

Which of the following statements most resonates with you?

I make friends and find my community in person, on campus

82.1%

17.9%

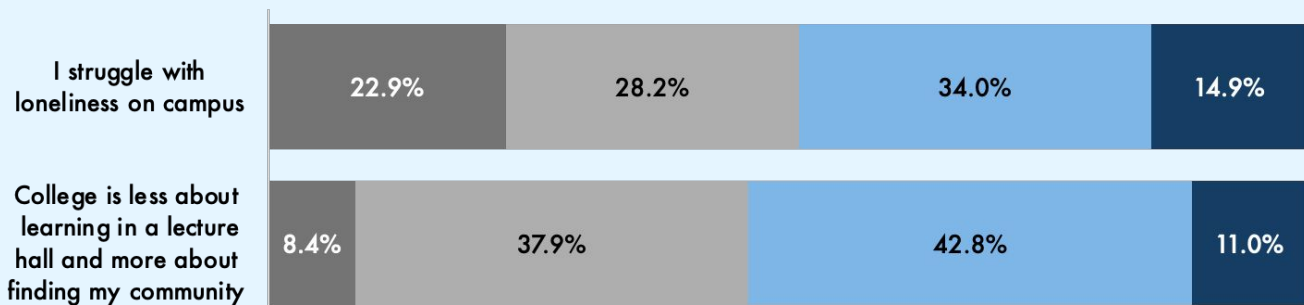
I make friends and find my community online, via social media

49% of students struggle with loneliness on campus.

This tension points to a key opportunity for brands to support students in their search for community and self-discovery and offer real value to a generation that's still healing from pandemic-era disconnection.

Thinking about your college experience so far, how much do you agree with the following statements?

■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree



An Opportunity for Brands to Break Out of the Feed

Rather than competing for attention in an endless scroll, brands can meet students where connection is actually happening—in dining halls, dorm rooms, club meetings, and late-night study sessions. These are the spaces where bonds form and influence spreads.

Showing up authentically and consistently in these physical spaces can help brands become part of students' daily lives and form the kind of meaningful, lasting relationships that social media alone can't deliver.





Brand Discovery as a Social Experience

College students are eager to try new brands—and they tend to do it together. For this generation, brand discovery is a social experience. 54% of students say they primarily discover new brands through their friends, and 59% say they like to buy the same brands as their friends.

This isn't just a demographic trend—it's a behavioral one rooted in physical proximity. College students live, learn, eat, and socialize in the same few square miles. This closeness creates a high-density culture of influence, where trends move fast and adoption often happens in groups.

54% of students say they primarily discover new brands through their friends.

Physical Proximity Predicts Student Behavior

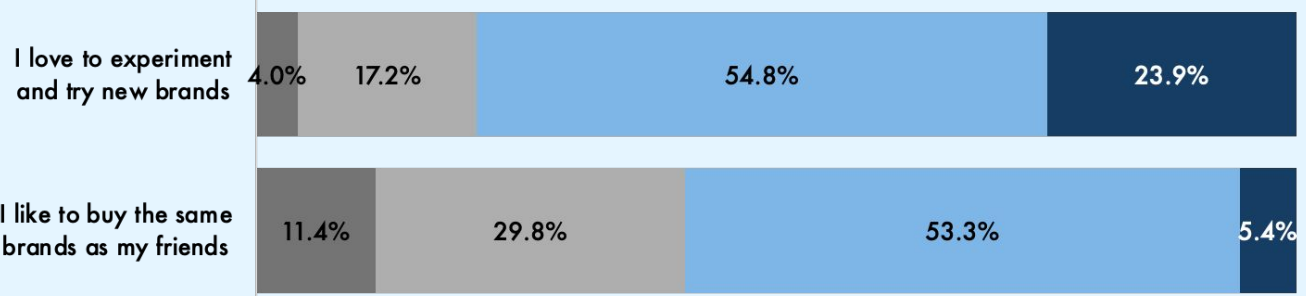
College campuses function less like a collection of individual consumers and more like a dynamic, self-contained ecosystem in which physical proximity is the most powerful predictor of student behavior. The shared experience and environment of campus life, rather than traditional demographic markers like class, age, or income, creates the cohort.

89% of students say they want to try new things and step outside their comfort zone while in college.

As a result, college is both a place and a distinct cultural moment, one where students are especially open to new ideas, habits, and affiliations. 89% of students say they want to step out of their comfort zones while in college, and 79% say they like experimenting with new and different brands. They're also highly attuned to their peers, simultaneously influencing and being influenced in turn.

Thinking about the brands you buy, how much do you agree with the following statements?

■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree



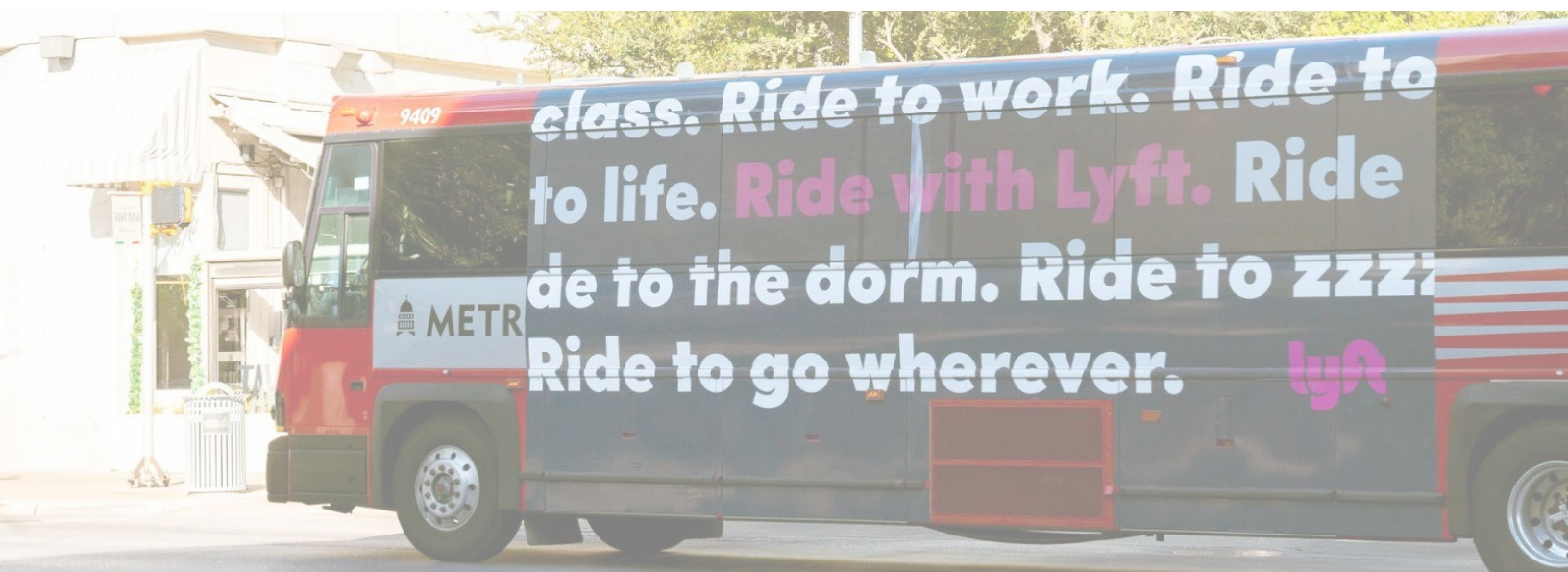
Brands that Succeed Treat College as a Cohort

To succeed with college students, brands must recognize that the college audience isn't just another digital targeting segment. It's a cohort shaped by physical proximity, shared experiences, and social connection.

Students don't make buying decisions in a vacuum. When they decide to try a new beverage, test a skincare brand, or pick up a favorite study snack, they're doing so surrounded by their friends, peers, and the close-knit milieu of campus life.

59% of students like to buy the same brands as their friends.

Successful brands recognize that there's little room for halfway engagement: you're either embedded in the social fabric of student life, or you're not part of the moment at all.





Balancing Quality, Cost, and Core Values

The stereotype of the broke college student doesn't hold up to the data. While price still matters, this generation is willing to spend on quality—especially for products they use daily or associate with self-care. 53% of students say quality matters more than cost when buying personal care products.

This willingness to invest extends beyond the bathroom cabinet. When asked about their shopping preferences for common household products like dorm essentials, food and beverage, cleaning products, beauty and personal care, and

53% of students say quality matters more than cost when buying personal care products.

clothing and accessories, students consistently favored more expensive, name-brand options over cheaper alternatives and generic brands.



Values matter to many students, too, with 38% saying that brands should appeal to college students by aligning with the causes they care about. Brands that flex their values with this socially conscious generation can differentiate themselves and justify a higher price tag.

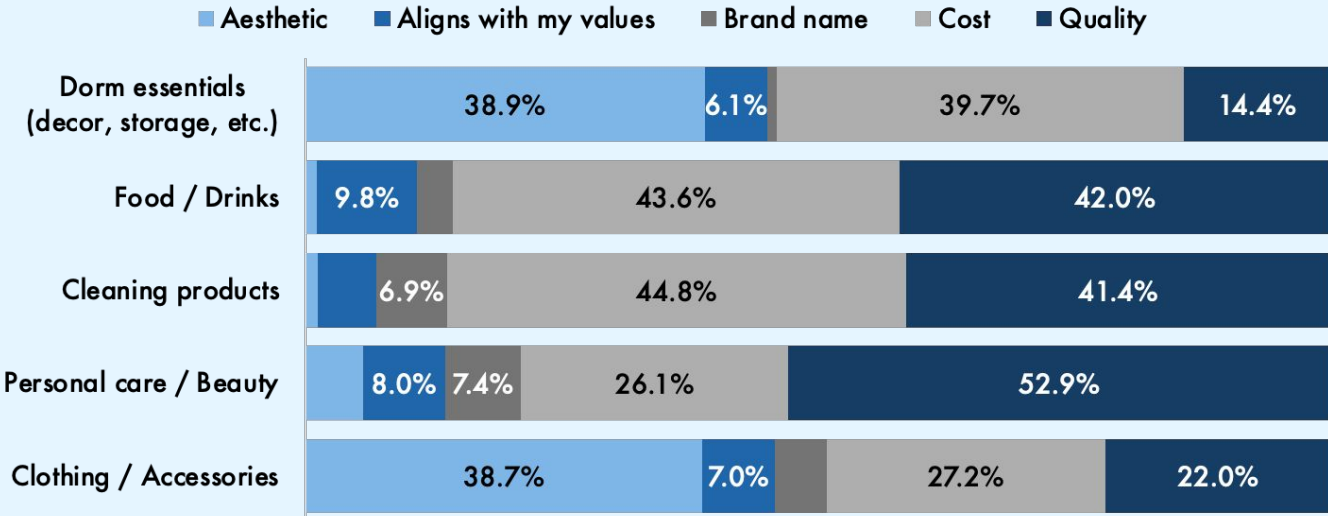
Fewer than 50% of students named cost as the most important factor when making purchasing decisions.

Students Make Nuanced Buying Decisions

For all the talk about the death of brand loyalty in the digital era, fewer than 50% of students named cost as the most important

purchasing consideration in any category we studied. Pure brand names aren't driving their purchases, either—quality is consistently more important than brand name for students, suggesting that the path to winning their loyalty is more nuanced than a logo. Our research indicates that overall, students weigh multiple factors when deciding what to buy, and not all factors matter equally across all categories.

When you shop for products in the following categories, which factors matter most?



Premium Brands Can Compete on Quality and Values

This is good news for premium brands. By demonstrating superior quality or aligning with causes that students care about, it's possible to win college students even at higher price points.

Students are already uniquely primed to discover new products and share favorites with their friends. Brands that show up in trusted, real-life contexts, with products that reflect students' standards and values, are more likely to earn their trust—and a place in their carts.



From COVID-Era Teens to Health-Conscious Young Adults

College students' beliefs about health and wellness were profoundly shaped by the pandemic. As teens, they endured years of isolation, physical separation from their peers, and spiking rates of anxiety and depression, often with little support from overtaxed institutions and family members.

Now, as this generation enters college, they're seeking proximity, connection, and community. The college environment—with its built-in cohort structure, constant physical closeness, and shared social rhythms—offers a powerful corrective

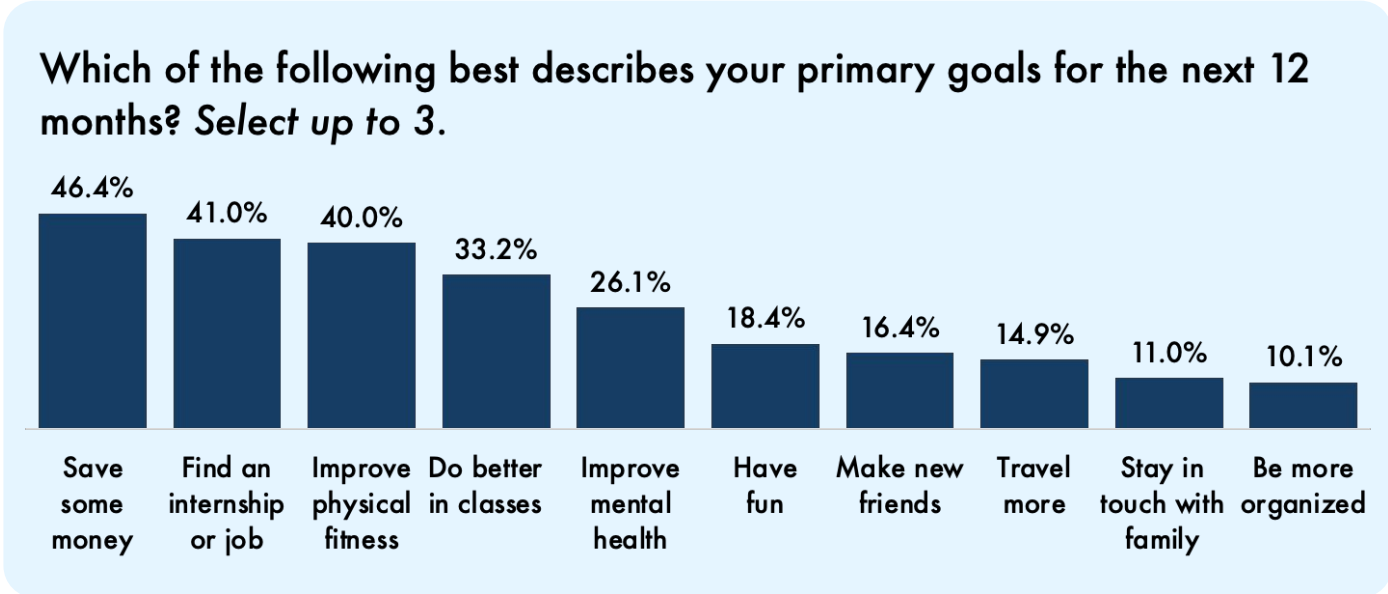
40% of students say improving their physical health is a top goal this year.

to years of separation. In this context, wellness becomes a social pursuit. A 2023 survey by the College Student Mental Wellness Advocacy Coalition found that 90% of students turn to friends for mental health information, with 40% doing so regularly. Additionally, 67% of students reported socializing with friends as a primary method to manage stress.

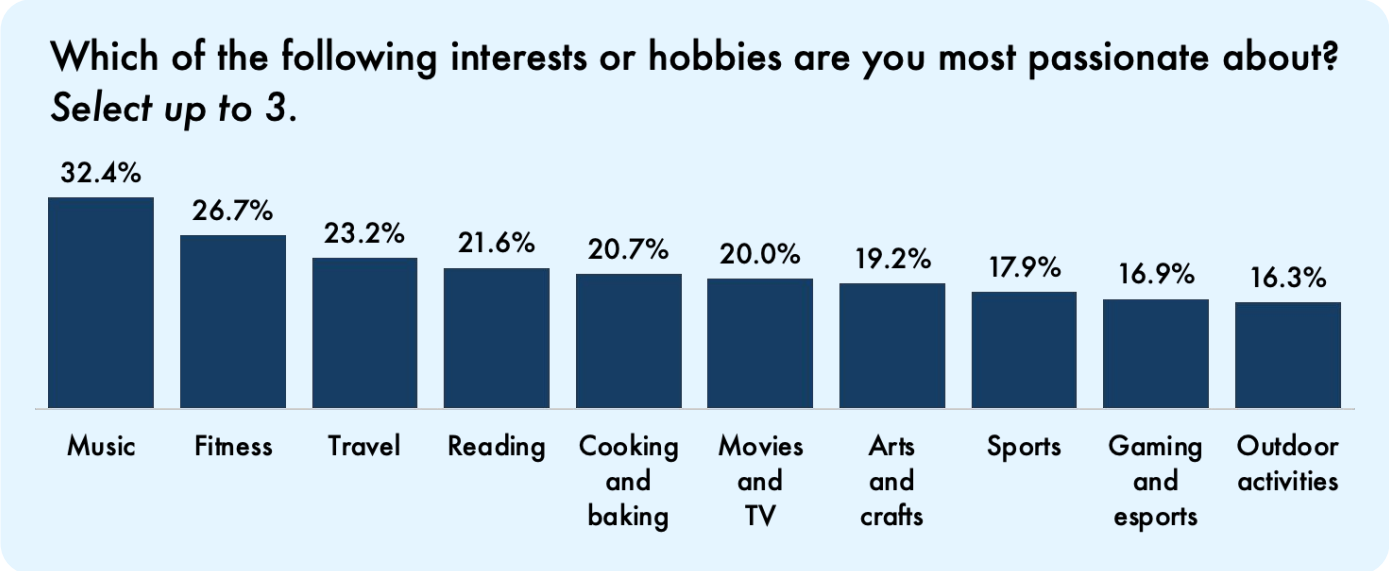
27% of students consider fitness to be a passionate hobby, more than every other category except music.

Physical and Mental Health Are Top Priorities

Our research indicates that students are actively pursuing their physical and mental health. When asked about their biggest priorities for the year ahead, students ranked improving both physical fitness and mental health among their top five goals, with 40% citing physical fitness specifically—surpassed only by saving money and finding a job or internship.



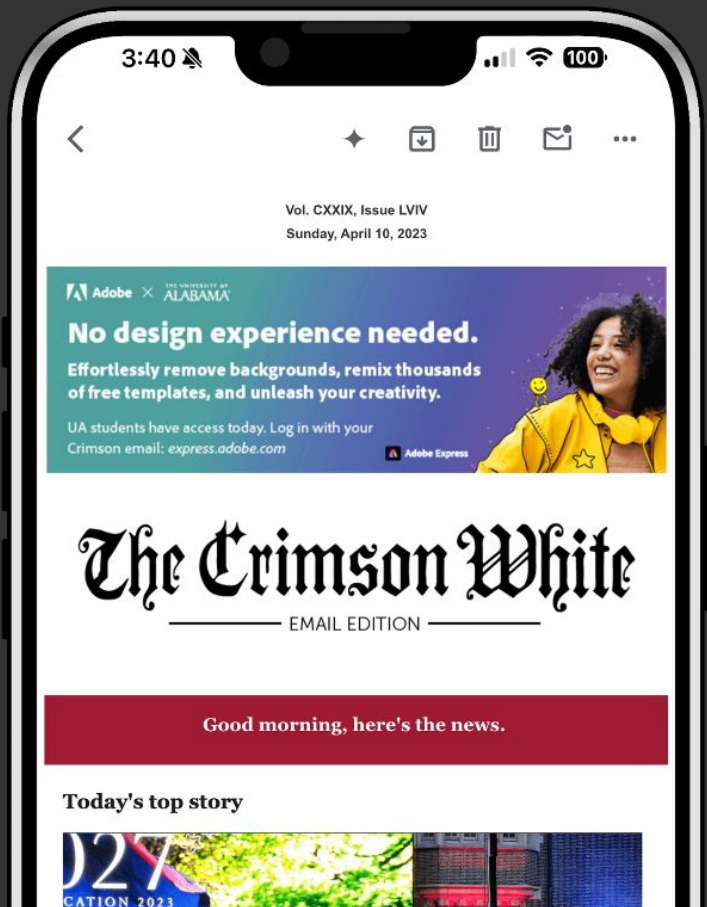
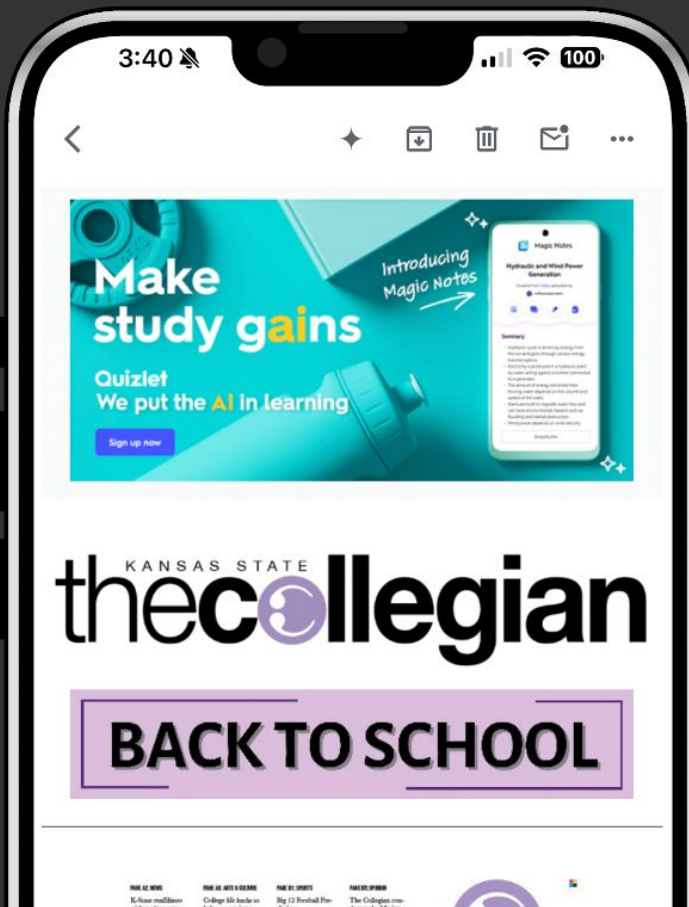
27% of students also consider fitness to be a passionate hobby, more than every other category except music. These priorities reflect a generation that sees health as essential to success and belonging.



Students Are Willing to Invest in Wellbeing

This data also reinforces our earlier findings that—contrary to stereotypes about broke, indifferent college students—this generation is willing to spend more on quality products, especially when purchasing products that impact their health.

The key lesson for brands is to show up with real care. Students can tell when a brand truly supports their well-being, and they reward it with trust and loyalty. Brands that lead with wellness-first messaging and deliver products that genuinely help students feel healthier, more balanced, and more confident will find an audience that’s eager to engage and ready to grow with them.



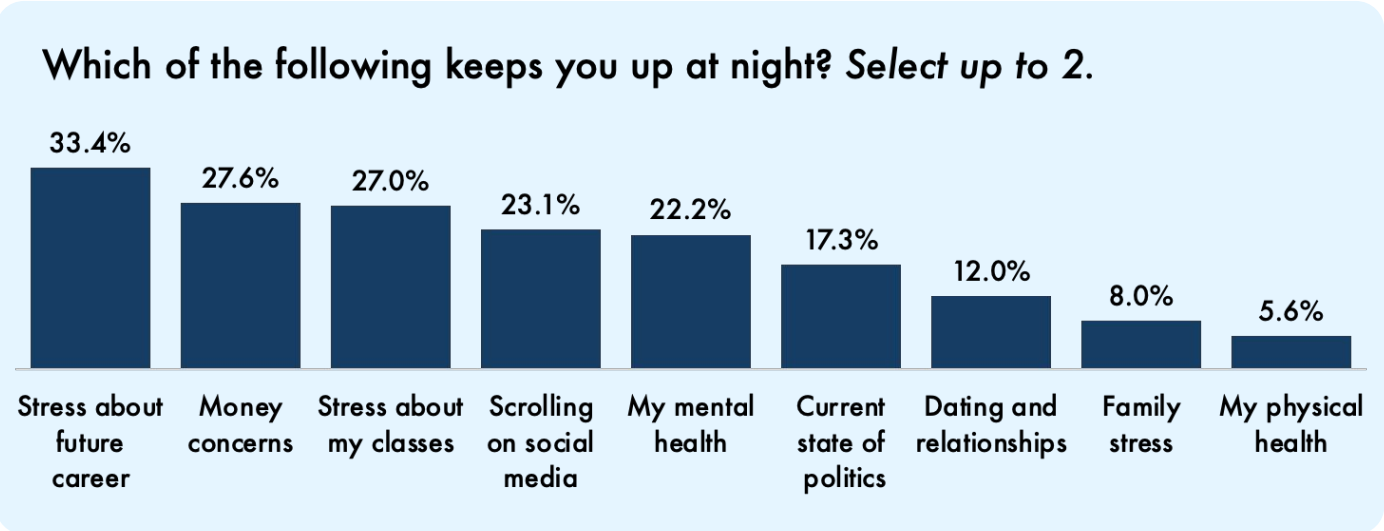
Ambitious and Uncertain About The Future

This generation cares deeply about their future careers. They're ambitious and eager for professional experience—their most common “ideal” summer break is gaining experience through an internship, not rest or travel—and most are attending college at least in part to benefit their careers.

However, this ambition is tinged with anxiety. Between the pandemic and the rise of AI, this generation has seen how quickly the world can change, but they're divided on how they want to prepare for the future. While 56% of students plan to pursue a traditional career path, others are skeptical—and

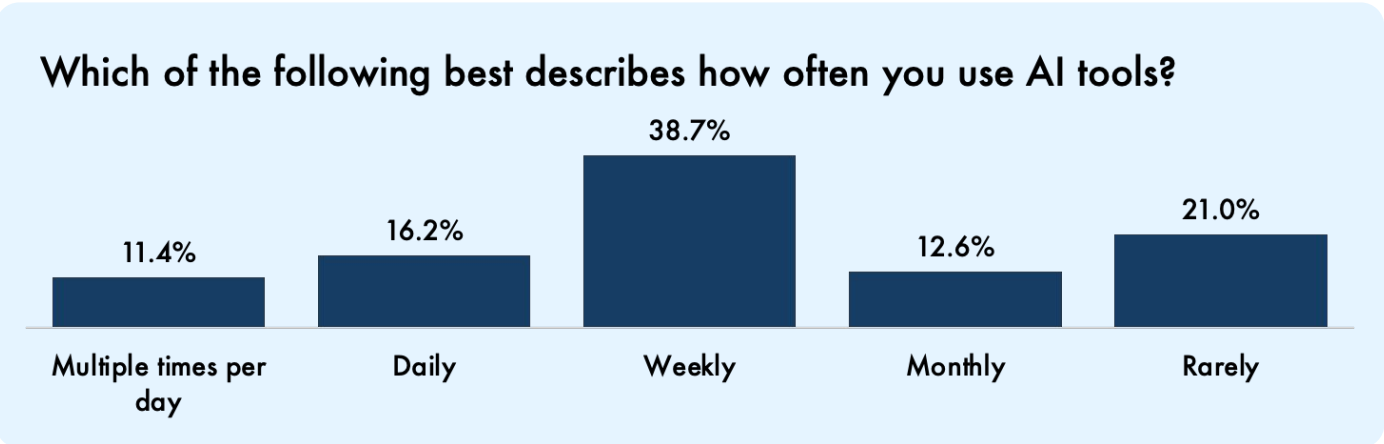
54% of students are concerned about how AI will impact their future job opportunities.

skeptical—and stressed—about its diminishing guarantees. One-third of students report that anxiety about their future career is a primary source of stress, surpassing concerns about financial strain, academic performance, and even political issues.



Students Embrace AI—with Caveats

The rise of AI has added another layer of uncertainty to students’ futures. In academics, they’re embracing AI as a productivity tool and study partner. Over 90% of students have used AI tools like ChatGPT and Grammarly, most commonly for research, coding support, studying, and notetaking, and 66% use AI tools at least once per week.



But students are split on what AI means for their futures. 54% have concerns about the rise of AI and its impact on their education and future job opportunities, while 46% are excited about AI and actively looking for ways to use it in their daily lives.

76% of students hope a degree will boost their career prospects.

Brands As Partners and Allies

For the 76% of students who hope a degree will boost their careers, college is a time for both self-discovery and preparation. This generation is prioritizing practical majors, pursuing internships early, and seeking out experiences that will give them a competitive edge.

Whatever career path students choose, brands have an opportunity to show up as allies on the journey. Whether by saving students time, helping them feel more confident, or expanding their access to opportunity, brands that speak directly to students' goals and uncertainties can build real trust and long-term loyalty.

Students are thinking hard about who they want to be and what kind of future they want to create. Brands that offer support along the way can show that they're not just selling a product; they're genuinely invested in students' success.



Reaching the Next Generation of Consumers On Campus

For years, brands have poured time, money, and creative energy into social media in hopes of connecting with Gen Z. But while brands have been racing to win the feed, often with diminishing returns, their biggest future consumers are forming real-life connections on college campuses around the country.

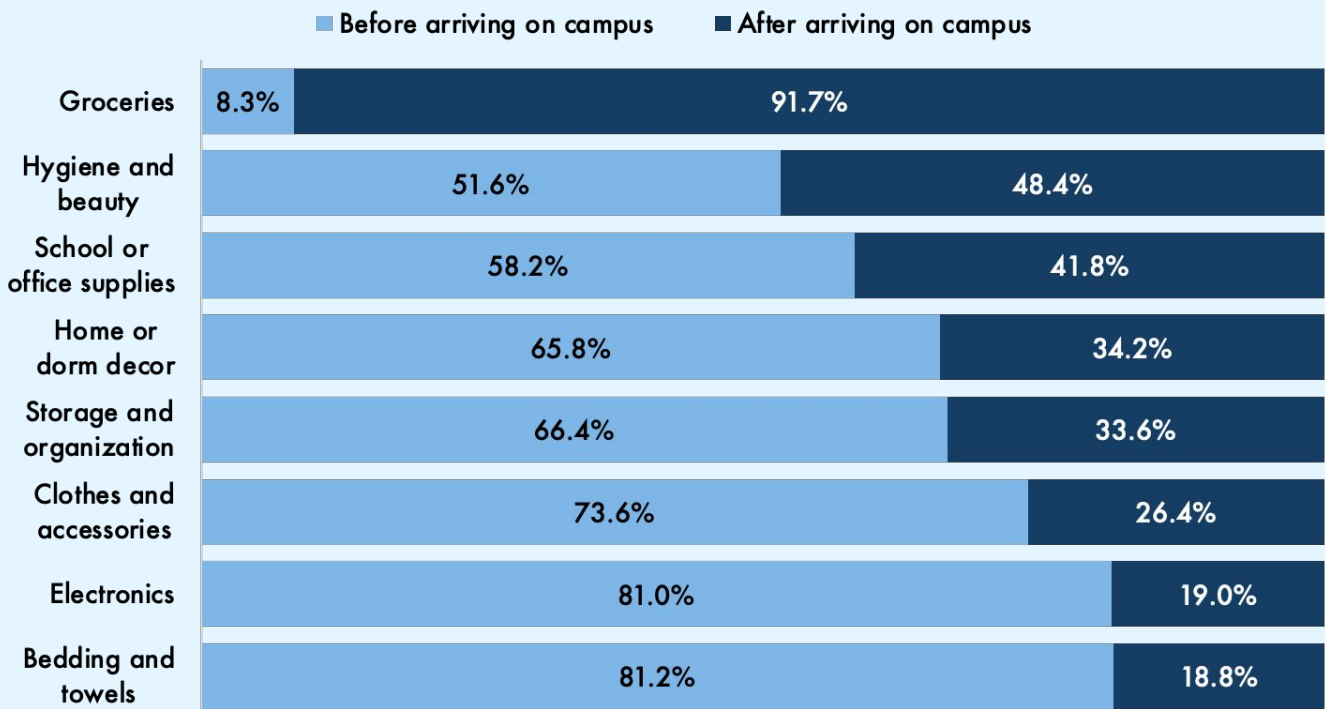
To earn this generation's attention and trust, brands must move out of their social media feeds and into the real world—the college campuses where students live, learn, socialize, and grow.

\$47B gets spent during college move-in—\$7B more than Black Friday.

Campus Is the Place. Back-to-School Is the Moment.

Back-to-school is a critical moment for brands to connect with students just as they're forming new habits and routines. \$47 billion is spent during college move-in alone—that's \$7 billion more than Black Friday. 99% of students make at least one shopping trip after arriving on campus, and significant share of essentials like groceries, hygiene products, and school supplies are purchased after move-in.

As an incoming first-year college student, when did you buy items in the following categories?



Many of these purchases happen socially, with 28% of students buying groceries, clothing, or dorm decor alongside friends or roommates. This makes back-to-school a uniquely impactful moment for students, who are making decisions and building affinities that far outlast the typical two-day move-in window, and a rare opportunity for brands to embed themselves into the rhythms of student life.

A Surround-Sound Approach Is the Best Way to Own the Back-to-School Moment

Brands that use a surround-sound approach to blanket a campus across multiple touchpoints—such as campus newspapers, SMS campaigns, flyers and posters, student influencers, billboards, and college transit—are best positioned to make a lasting impression on students, especially during high-impact moments like back-to-school.

92% of groceries, 48% of hygiene products, and 42% of school supplies are purchased after students arrive on campus.

A student might spot a brand's flyer while grabbing breakfast in the dining hall, see the same brand featured in the college newspaper, pass a billboard on the way to class, and hear a roommate mention it later that evening. By showing up consistently across these everyday moments, brands can become more than just products students use. They become trusted partners in students' lives, planting the seeds for long-term loyalty and trust.



Flytedesk—Your College Marketing Partner

Flytedesk is your partner in understanding and reaching the college audience. By combining large-scale student data analysis with rigorous research methodology, we go beyond surface-level trends to provide your brand with actionable insights into student behaviors and purchasing decisions.

As the first (and only) college marketing platform for reaching students at scale, we pair deep behavioral insights with smart ad delivery to make sure your message doesn't just show up—it sticks. We work with over 2,300 campuses across the United States, reaching over 96% of all college students.

- **9,255 campus out-of-home units**
- **14,712 campus transit panels**
- **595 campus-wide email newsletter placements**
- **908 college newspapers**
- **4.4 billion monthly impressions**
- **994 college news sites**
- **581 SMS student directories**
- **4,845 street team products**

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