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THE ROPER ORGANIZATION INC.

March 31, 1993

Mr. Eli Segal
Assistant to the President
Director, Office of National Service
White House
Old Executive Office Building, Room 145
Washington, DC 20500

STUART HIMMELFARB
Vice President

THE ROPER ORGANIZATION INC.
205 East Forty-Second Street, New York, NY 10017
Telephone: (212) 599-0700 FAX: (212) 867-7008

Dear Mr. Segal:

I read about you and your work in the Brandeis Alumni Magazine (I have an MA from CJS, class of '76), as well as in the newspaper, and decided to try to reach you.

I would appreciate an opportunity to introduce you and your colleagues to the work we do to understand the attitudes and activities of college and high school students nationwide. Much important information is already available here and new studies are constantly being conducted. Our objective is to generate the kind of information that can help move your efforts forward in a way that will appeal to students and meet their needs and interests.

What follows is background information about our work and a proposal that we meet to assess the current situation among students and, perhaps, explore your information needs and future activities.

Roper CollegeTrack is a market research and consulting service specializing in the college market and is the largest service of its kind. We conduct three national marketing and media surveys among college students each year. We interview 1200 full time undergraduates and 150 graduate students on 100 campuses across the country for each study. All research is conducted on campus. Roper CollegeTrack is the only syndicated study of this market. For many categories, we can provide trend data as far back as 1988. We are pleased that both The Roper Organization and Roper CollegeTrack have been named to *American Demographics* magazine's list of the Best 100 Sources for Marketing Information for 1991, 1992 and 1993.

In the past school year, we also introduced *The Roper High School Report*. This study was conducted among a representative sample of over 500 tenth to twelfth grade students nationwide in November 1992. It is designed to be compatible with Roper CollegeTrack and, as a result, to offer insights into the important transition from high school to college. Of course, we also interviewed students who are not college bound to see how they relate to those who plan to go on to college.

Mr. Eli Segal
March 31, 1993
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Both the college and high school studies focus on students' attitudes toward social and economic issues which affect them and their families as well as providing information on their financial resources, plans for the future and their other interests. Since these are marketing and media studies, we do focus on consumer activities, media habits, leisure time pursuits and so on. However, we believe strongly that our marketing and media clients can only succeed if they understand the larger attitudinal and lifestyle context in which they are operating. As a result, our studies are able to provide you with an in-depth look at high school and college students' mood and assess how they feel about themselves and their prospects. This includes their opinions on problems facing the country and specific problems facing their school or campus. These questions, for instance, have helped us understand why students express pessimism about many important issues.

I have enclosed some materials that describe our work in more detail. However, the best way to convey the breadth of issues we cover would be to meet. I would be happy to come to Washington at a time that is convenient to you and brief you and your colleagues on the mood on campus, how students are paying their college expenses, and many other issues.

From there, I hope that we can be your partners in creating a program that expands access to a college education and helps involve students in making this happen. We will all benefit from the program's success.

Thank you for your attention. I will call your office to follow up.

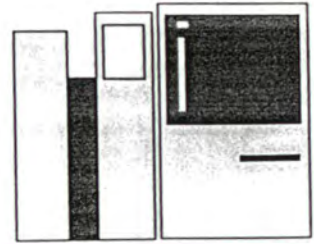
Sincerely,

A handwritten signature in cursive script, appearing to read "Stuart Himmelfarb".

Stuart Himmelfarb
Vice President

Enclosures

ROPER



COLLEGETRACK™

Background Materials

Schedule

Sample of Data

Credentials

Rates

Press Clippings

*Please note the
letters to the Editor
in the clippings
section.*



The Roper Organization
205 East 42nd Street
New York, NY 10017
(212) 599-0700

Roper CollegeTrack
Schedule of Syndicated Studies

April 1993	Automotive Study Lifestyle and Media Study--Part I
October 1993	Financial Services Study Lifestyle and Media Study--Part II
November 1993	Consumer Electronics and Computer Study Lifestyle and Media Study--Part III

Special Studies

The Roper High School Report
(10th-12th Grade Students)

The Roper CollegeTrack Television Study

Extensive custom research and consulting services also available

Pre- and post-studies of the impact of college events/promotions

Telephone call-back capability

The Roper Organization 205 East 42nd Street New York, NY 10017 (212) 599-0700

SAMPLE OF DATA

- Students' residence:** about 90% of students live on or off campus, i.e., on their own and away from their families. Off-campus dwellers are a key target group who have set up their own households for the first time.
- Telephones:** the overwhelming majority of students have personal phones.
- Car ownership:** more than 60% of students own or have cars at college; the cars they own and the cars they plan to buy in the future vary widely, as do the features they desire in cars and their perception of the value and quality of leading car makes.
- Category Penetration:** Roper CollegeTrack examines numerous product categories. In the past month, more than 80% of students purchased regular soda and over half purchased beer. 56% of female students bought a women's fragrance (nearly three-quarters of these students bought a "class" brand). Roper CollegeTrack also provides brand data for each category surveyed, as well as examining location of purchase. What's more, results can be cross-tabulated with media habits, living arrangements, spending level, etc.
- Consumer electronics:** more than two-thirds of students have a personal TV and more than 40% of these sets have a VCR attached and a similar number receive cable TV. One third have a CD player.
- Entertainment:** 75% of students went to at least one movie in the past month. The mean number of movies seen was 2.5 and students represent about 10 million movie tickets in the past month.
- Media Habits:** Over 80% of students read at least one magazine; Roper CollegeTrack reports on readership for about 80 magazines, as well as time spent with other general and controlled circulation print media, television, radio and out-of-home media unique to the college market.

CREDENTIALS

Roper CollegeTrack is a New York based market research and consulting service specializing in the college market.

Roper CollegeTrack research has been conducted on campuses nationwide since March 1988. In that short time, it has become the leading supplier of marketing and media information dealing with the college market. RCT's regular syndicated surveys of students' attitudes, purchase behavior and preferences, magazine readership and other media habits have been featured in *The New York Times*, *The Wall Street Journal*, *USA Today*, and a variety of trade publications. Both The Roper Organization and Roper CollegeTrack have been named to *American Demographics'* Best 100 Sources for Marketing Information for 1991, 1992 and 1993.

RCT's client list features major corporations such as AT&T, General Motors, Apple Computer, MTV Networks, Fox Broadcasting, Reebok, Coca-Cola, Pepsi, Kodak, ABC/Capital Cities, Levi Strauss, Toyota and all of the leading college marketing and media services.

Roper CollegeTrack's principals are Sherman Agins and Stuart Himmelfarb:

Sherman Agins is a veteran marketing oriented research professional. Mr. Agins has been providing research services to advertising and marketing clients for more than thirty years. Before the formation of CollegeTrack, he was Senior Vice President and Group Research Director at DDB Needham Worldwide Advertising (formerly Doyle Dane Bernbach Advertising). He has managed research and strategy development on a variety of national advertisers' accounts, including, Saab, Mobil, American Airlines, GTE, Polaroid, Seagram and Hershey. Prior to joining DDB, Mr. Agins was Vice President and Director of Research at Needham, Harper and Steers Advertising. He has a Bachelor's Degree in Economics from Brooklyn College and an MA from New York University.

Stuart Himmelfarb gained broad experience in advertising and marketing during his seven years at Doyle Dane Bernbach where he became Vice President and Management Supervisor. At DDB he was involved in accounts covering a broad array of consumer categories, including: Heinz US (Weight Watchers Frozen Foods and Desserts); Seagram wines, spirits and new products; Chanel; Shasta soft drinks, Ponderosa Steakhouses and IBM. Mr. Himmelfarb is a graduate of the Columbia University Graduate School of Business, where he earned an MBA in Marketing and was a member of the Beta Gamma Sigma Honors Society. He also holds an MA from Brandeis University and a BA from Brown University.

The Roper Organization 205 East 42nd Street New York, NY 10017 (212) 599-0700

About The Roper Organization

The Roper Organization is one of the oldest marketing and opinion research firms in the world, having been founded in 1933.

Roper is probably best known by the public at large for its work in the public opinion, political and public affairs areas. Roper came into national prominence, along with Crossley and Gallup, by having made the most accurate prediction of the 1936 U.S. Presidential election outcome.

Over the decades, Roper has conducted thousands of research studies for major corporations, government agencies, and media groups. As early as the 1930s and 1940s, it conducted the quarterly *Fortune* magazine surveys. The company currently conducts numerous specialized surveys for publication. For example, since 1959 it has published biannual reports on Americans' attitudes toward television, sponsored by the Television Information Office. Since 1985, it has published major reports based on its surveys about American women, American youth, the Federal tax system, the American Dream, affluent Americans, the American way of buying, and others.

In addition to its work in the area of public opinion research, the firm regularly conducts proprietary studies in the areas of consumer behavior, marketing and corporate image. The organization also specializes in opinion surveys to be used as evidence in legal and regulatory proceedings. In addition to its studies among the general public, Roper has conducted studies among smaller, more specialized groups, such as opinion leaders, business executives, government officials, security analysts, physicians and so forth.

Roper specializes in youth research as well. It conducts annually The Roper Youth Report, a syndicated study of what America's schoolchildren are thinking, doing, and buying. In addition, it conducts on an ongoing basis Roper CollegeTrack, a market research and consulting service specializing in the college market.

Since 1973, a principal activity of The Roper Organization has been the ROPER REPORTS, a ten-times-a-year subscription research service. ROPER REPORTS monitors the habits and attitudes of the American public in social, economic, political and consumer areas. It is subscribed to by some 40 organizations which include government agencies; corporations in such diverse fields as telecommunications and information services, oil, autos, foods, retailing and financial services; leading advertising agencies; and both print and broadcast media. Since 1986, Roper has published *The Public Pulse*, a monthly newsletter analyzing trends in Americans' attitudes, values, and behavior. *The Public Pulse* currently has more than 1,000 subscribers in the United States and abroad.

Roper's international division, International Research Associates (INRA), was founded in 1945 to provide multinational research capabilities to business and government. INRA now has affiliates and subsidiaries in 27 countries and full research capabilities 32

other nations. This division of Roper helped to pioneer comparable multinational sampling methodologies. INRA provides a diverse array of international public opinion and market research services to clients on five continents. In addition to its proprietary research capabilities, it offers a number of syndicated, multi-client services such as INRABUS (an omnibus service conducted in 11 countries simultaneously every month) and the European Opinion Leader Forum (a biannual survey of attitudes of political, business, journalistic, and academic elites in the five major West European nations).

The Roper Organization's executive headquarters is at 205 East 42nd street in New York City. This is where the firm's professional staff is located. The firm's parent company, Starch INRA Hooper, is located in Westchester County, New York. This is where the major operating departments—sampling, field, coding, editing, data processing, printing, lettershop, and production—are located.

In total, the company has over 200 full-time employees, including senior research executives whose disciplines encompass marketing, economics, international trade, history, politics, sociology, psychology, communications and statistics, as well as sampling design and methodology—and approximately 100 part-time employees.

The firm has its own personal interviewing field force across the United States, which it uses for all in-home, face-to-face surveys such as ROPER REPORTS. It maintains centralized telephoning interviewing facilities in New York City (50 monitored interviewing stations), Detroit (20 stations), and Phoenix (20 stations). These offices are occupied by the telephone center administrative staff, telephone sampling and field staff. Beyond these central location interviewing facilities, Roper has an additional 250 telephone interviewing stations in 25 other locations throughout the United States that are used for local interviewing.

Roper, through its sister company, E. Friedman Marketing Services, owns intercept-interviewing and focus group facilities in 27 shopping malls across the country. It is one of the leading providers of mall-intercept research and qualitative research.

Roper also conducts numerous mail surveys every year, both nationally and internationally. These mail surveys are handled by professionals specialized in mail sample design and executed by the company's own print and lettershop operations.

The corporation has its own computers and in-house staff coders, data entry operators, programmers and spec writers. Most data processing for both custom and syndicated surveys are done in-house by company professionals to insure quality and, for proprietary surveys, confidentiality.

Roper has been a leader in applying desktop publishing technology to the dissemination of research results. Since 1986, it has invested aggressively in the latest computer hardware and software in order to provide clients with high-quality, professional publications at little or no additional cost to the client. Currently, Roper produces seven monthly newsletters—incorporating text, graphics, and other design elements—up to finished mechanicals. All of its major published reports since 1986 have been produced and delivered to clients in "camera-ready" form for immediate delivery to the printer.

Roper maintains its own in-house staff of computer graphic artists, designers, and lay-out professionals using the desktop publishing capabilities. In addition to its newsletter and publications activities, Roper prepares slides, visuals, and presentations of survey results for clients.

ROPER COLLEGETRACK™

1993 Rates

<i>Lifestyle and Media Study</i> (issued in three reports based on April, October and November surveys)	\$10,000
<i>Industry Reports (each)</i>	\$8,000
Automotive	
Financial Services	
Consumer Electronics and Computers	
<i>Lifestyle and Media Study plus one Industry Report</i>	\$16,000
<i>Lifestyle and Media Study plus three Industry Reports</i>	\$28,000
<i>Proprietary Research</i>	
Open ended question	\$1,500
Framework question (per 3 items)	\$1,200
Show cards (each)	\$100
Additional Banner	\$1000
Data Tapes or Diskettes available	
Extra copies of reports	\$80
Consultation--day rate	\$2500

Getting dollars from scholars

College 'fests' tap into buying power of hot new consumer set

By CHRISTOPHER COX

If Mohammed, Buffy and Chip can't come to spring break then, by God, spring break will come to them.

Seeking to tap into the elusive, yet lucrative, college-age market, companies are increasingly turning to "event marketing" — hyperkinetic promotions that combine trade-show hucksterism with Fort Lauderdale fun.

"They can't bring the waves, the sand, the bikinis or the beer, but in terms of entertainment marketing, it's pretty much a transfer of many events and activities," said Eric Weil, a principal in Strategic Marketing Communications, which publishes Collegiate Trends, the big newsletter on campus trends.

Last October, for example, College Fest: Way More Weekend attracted almost 19,000 students and 150 advertisers to Boston's John B. Hynes Veterans Memorial Convention Center.

It was a two-day orgy of free product samples, live music and every diversion — from a mechanical bull ride to a hollering contest to a "best torso" competition — short of Connie Francis singing "Where the Boys Arc."

"The fact there were great bands there and grab bags compelled me to attend; you know how it is when you're a poor student," said Curtin Ashley, 24, a Berklee College of Music grad who has attended the annual College Fest promotion as a consumer and, with his band, Atlas Shrugged, as a performer.

The CEOs of Fortune 500 companies get heart palpitations just looking at the numbers: The current college market boasts more than 13 million students, who have an annual discretionary income exceeding \$30 billion, according to Paul Tedeschi. Tedeschi is president of Collegiate Advantage, a local marketing firm that handles Campus America Tour, which kicks off a 40-college blitz next month.

Many college students are making buying decisions for the first time in their lives, said Stuart Himmelfarb, vice president of the Roper Organization, which monitors the college market.

There are jeans, compact discs and hair mousse to be sold, as well as more mundane items such as dish soap, toothpaste and microwave ovens.

"They have a remarkable amount of current buying power," Himmelfarb said. "Their possessions, in terms of durable and non-durable goods, are remarkably high."

The several million students who live off-campus have established independent households, Himmelfarb said, and companies would do well to cultivate brand loyalty now rather than later.

The college crowd, he said, "is an entry point into the adult market, rather than an ending point in the teen market."

However, ad experts view college students as a notoriously difficult market to tap.

Lawrence H. Wortzel, professor of marketing at Boston University, said the group is "rather difficult" to reach via traditional media techniques.

They don't read newspapers as extensively as older adults, Wortzel said. Magazine readership is scattered; television viewing is mixed and "not terribly predictable," he added.

Wortzel characterized college-age consumers as sophisticated, "very empirical shoppers" who view ads warily and trust only what they hear from people they trust or can experience at hands-on events.

"This age group really enjoys the interactive nature of the event," said Tony Benis, media director for Commonwealth Promotions, the Boston-based creators of College Fest. "It's a whole festival. There's live music, there's comedy, there's fashion shows, there's entertainment. And it's all for them."

"There are thousands upon thousands of their colleagues, their peers, standing there, milling around with them."

Ashley likened the experience to the produce-induced hysteria of the Haymarket.

"For some reason, Haymarket is the most miserable, frenetic atmosphere, but you enjoy it because you know you're going to get 12 tangerines for \$1," he said. "But this is with more energy, the whole youth vibe."

Companies have recently begun pouring ad dollars into promotions such as College Fest and Campus America Tour. In the 1989-'90 academic year, Weil said, companies spent about 8 percent to 9 percent of their college-directed ad dollars on event marketing.

During the 1990-'91 year, said Weil, the percentage rose to 13 percent; in the 1991-'92 academic year, the percentage swelled to 24 percent.

When Berklee celebrated its 25th annual jazz festival yesterday, 5,000 "gig bags" — each containing more than a dozen freebies and discount coupons — were handed out to high-school and college students. Among the items were a BMG jazz CD sampler, Schick razors and Blistex lip balm.

Marketing people, said Benis, "love targeted sampling opportunities."

The jazz CD? This, after all, is a music school. The razors? For many students, it's shaving indoctrination time. But Blistex? "You do any sort of wind instrument," Benis explained, "you need to take care of those lips."



MARKET-MAKERS: Tony Benis and Betty Fulton of Commonwealth Promotions say 'event marketing' is an effective way to reach college students. Staff photo by Arvid Pataca

the fee is a deal.

"They pay their \$5, they get this survival bag full of stuff and they go to College Fest and they get tons of free stuff: CD samplers, baseball caps, T-shirts, sweat shirts, earphones. They get easily \$50 to \$100 (worth of merchandise)."

These savvy consumers, the best and brightest shop-

pers of their generation, already seem jaded beyond their years.

"More and more people my age are being marketed to constantly," said Ashley. "They're always aware of that... They just say, 'OK, let them market to me for a few hours, then I'll get these free CDs and cool coupons.'" □



FREE-FOR-ALL: Students scramble for giveaway items being tossed into crowd at College Fest '92.

FOR YOUR INFORMATION

Here's a look at what full-time students at four-year colleges are buying:

- One-third own microwave ovens
- 50 percent own television sets
- One-third own VCRs
- 52 percent rented movie video in the past month
- 54 percent went to an off-campus movie in past month
- 23 percent went to an on-campus movie in past month
- 27 percent own compact-disc players
- 52 percent own audio equipment
- 65 percent have a vehicle at college
- 40 percent plan to buy a vehicle in the next two years
- 46 percent have used an ATM in last week
- 43 percent have used a computer in the last week
- 35 percent traveled on spring break
- 20 percent bought traveler's checks in the last year

Source: Roper CollegeTrack, 1991-'92

College Students, at Least, Aren't Apathetic

To the Editor:

A June 28 front-page article characterizes young people 18 to 29 years old as "indifferent toward public affairs" and current events, and you quote a Times Mirror Center for the People and the Press study that states they are a group that "knows less, cares less, votes less and is less critical of its leaders and institutions than young people in the past."

Our research among college students nationwide since March 1988 leads to a different conclusion — there are among 18- to 29-year-olds a crucial core group of students that does care, does vote and is aware and critical of the world around them. College students have strong opinions about the major issues facing the country and are active consumers of major news media, from newspapers and news weeklies to television news. A summary of key findings:

- Three-quarters of undergraduates are registered to vote, and 83 percent of those voted in the 1988 Presidential election. Both rates are far higher than those for their non-college peers or adults as a whole.

- College students are critical of our national leadership. More students approve of Mikhail S. Gorbachev's performance (81 percent) than President Bush's (63 percent) or Vice President Dan Quayle's (40 percent).

- Students are especially critical of the business community's environmental efforts. Asked to rate the business community on a 10-point scale for protecting the environment, students gave business a grade of less than 4. Only 7 percent of undergraduates gave it a rating of 7 or higher.

- By a 5-to-1 margin, students rank the overall quality of Japanese products over those of the United States; there was even a slight preference for the quality of products from West Germany. By better than 2-to-1 students rank the Japanese economy over the United States as the strongest in the world.

- In our news media studies, Newsweek and Time are consistently the leading publications read by students and news is among the top five television programs they report watching. Eighty percent read their local newspaper at least weekly and more than a quarter read it five or more times a week. More than 90 percent read their campus newspaper.

- Sixty percent indicate that they have become more politically aware since coming to college. A similar number indicated their political views had shifted since coming to college.

- Asked if they were likely to be involved in political organizations or activities after college, about half answered that they would.

- More than 90 percent of students favor a woman's right to choose abortion; 63 percent favor elimination of investments in South Africa; 89 percent favor stronger protection for the

rise as a result, 80 percent favor Government assistance to provide day care for working families; 80 percent favor prosecution of drug users, and 78 percent indicate that they do not believe that equal opportunity exists for all Americans.

We do not share the view that this is an "indifferent generation." What's more, all people 18 to 29 cannot be lumped into one uniform group. While we cannot speak for the noncollege population, we can point to three years of studies on campuses across the country that this is a vibrant, opinionated, active group. They'll be heard from.

STUART HIMMELFARB
New York, July 9, 1990

The writer is president of CollegeTrack, a market research and consulting company.

The New York Times

College Students Show Little Voter Apathy

To the Editor:

"Is the Vote, Too, Wasted on Youth?" (The Week in Review, June 30) provides a pessimistic account of the participation of younger voters in elections on the 20th anniversary of the 18-year-old vote.

However, the low turnout among all 18- to 20-year-olds does not tell the whole story of youthful voters; among college students, voter registration and voting are high.

In a study conducted by Roper CollegeTrack in February 1989 among 1,200 full-time students on campuses across the country, we learned that 71 percent of students in four-year and community colleges who were younger than 21 were registered to vote (as were 82 percent of students older than 21). Asked if they voted in the 1988 Presidential election, more than 80 percent of registered students, regardless of age, responded that they had. From these figures, college students are nearly twice as likely as their noncollege counterparts to have voted in the 1988 election. Enrollment figures from the Department of Education show college students represent about 4½ million votes.

The self-absorption and lack of interest in current events that are often used to explain low turnout among younger voters are less evident on campus — many students are aware of and interested in current events. A study we conducted last fall, "The MTV-CollegeTrack Report," explored many of these issues:

- One in five students is involved in political activities or organizations, and about half plan to be involved after college.

- More than 60 percent try to follow what's happening in politics.

- About 60 percent have become more politically aware while at college, and not surprisingly, this sense increases with year of study.

- Two-thirds of students say their political views have changed while at college, including about 50 percent who say they have become more liberal and 15 percent who have become more conservative.

- Students hold strong opinions about major issues facing the country: 91 percent favor distributing birth control information to high school students; 76 percent favor keeping the decision to have an abor-

tion between a woman and her doctor; 88 percent favor efforts to protect the environment even if this results in higher prices; 69 percent favor gun control; 75 percent do not believe that equal opportunity exists for all Americans.

- Three-quarters of students disagree with the statement "environmental problems today are so large that there is little a person can do to make a difference," indicating a sense that concerned citizens can help solve some of the major problems facing the country.

While you highlight the problems in voter participation and civic-mindedness that affect many segments of the population, one group is benefiting from the right to vote. And who knows what this group of active voters will accomplish if the right leader emerges and asks them to do something.

STUART HIMMELFARB
Vice President, Roper Organization
New York, July 1, 1991



BIG FANS ON CAMPUS

By Alice Cary

"I can't believe Sam and Rebecca aren't going to have a baby!" moans Adriane Shuman, a sophomore at Springfield College in western Massachusetts, as she zaps off *Cheers* and collapses on her pillow.

"It would've been cute to see a little Sam Malone running around," laments Kristin Lavin, her roommate.

Inside the cinder-block walls of Room 711, International Hall, amid dirty laundry, dictionaries, and U2 and Public Enemy posters, the two coeds and five others—the usual Thursday night crew—have gathered. Snippets of *Beverly Hills, 90210* filter in from another room down the hall. Shuman picks her way over sprawled bodies to shut the door, drown out the distraction.

Thursday night, it seems, is decision time at Everywhere U. The bickering used to be over Bill or Bart; now it's Sam vs. Dylan and Brandon—and Fox's heart-throbs are gaining on the aging pitcher.

Good thing Shuman and her Mass-

If you want to know what'll be hot on TV tomorrow, look at what college kids are watching today—it's what the networks do!



TV time *Jessica Shaw* (with headband) and Columbia University pals tune in to a dorm TV

achusetts pals don't room with Barnard College/Columbia University junior Jessica Shaw in New York City. Shaw, who helps pen a column called "Beverly Hills UnZIPed" for the Columbia news-

paper, has enough trouble on her hands. The paper's sports editor—a *Cheers* fan—always beats her to the office TV, so she has to hoof it back to the lounge at her dorm, Shapiro Hall. For that sacred 60 minutes, no gabbing, no cooking. "There's a real sisterhood," she explains. Is that what kids go to school for? Aren't Harvard undergrads, at least,

buried in a pile of Proust and physics?

Only some. "We were suckled on MTV," says Harvard senior Dave Mandel. Dan Pereira, his colleague on the *Harvard Lampoon*, says, "At the *Lampoon* we use television as a reference more often than Dickens."

On campuses across the country, Bart's still cool. *Letterman* rules, and *Beverly Hills, 90210* is making them drool.

While Mom and Pop settle in for another night of *60 Minutes* and *Murder, She Wrote*, dorm dwellers crave cutting edge. Network execs call them trend-setters. "The opinion-leader audience. They're the first to explore the

dial," says Andrew Fessel, senior VP of Research and Marketing at Fox. Students are certainly much more selective; although 92 percent say they watch regularly, students view an average of only 17 hours of TV a week, according to *Roper CollegeTrack*—which measures

Campus Sound Bite

"The Simpsons is still a pretty good conversation piece. We appreciate its twisted humor. The *Cosby Show* is definitely not on our list."

—Catherine Thorpe, Senior, Columbia University

campus attitudes on everything from AIDS to shampoo—as opposed to 28 hours for the average 18-plus adult.

(Click over to NBC, hear the same tune. "They're most likely to catch the wave of a trend before it breaks," says Nicholas Schiavone, vice-president of Media & Marketing Research, Ditto at ABC.

where Marketing and Research VP Dick Montesano notes: "As a prime-time group, they can turn a fad into something real."

About two-thirds of today's undergrads lug TVs to their rooms, according to *CollegeTrack*. More than half the sets come equipped with remote controls, cable, and VCRs. *CollegeTrack* says these entertainment hounds have dollars to

Students' TV Top Ten

Four-year undergraduates nationwide were asked to name the shows they watch most frequently

1. Cheers
2. The Simpsons
3. The Cosby Show
4. Beverly Hills, 90210
5. Saturday Night Live
6. Days of Our Lives
- A Different World
- In Living Color
- Married...with Children
10. Late Night with David Letterman
- L.A. Law

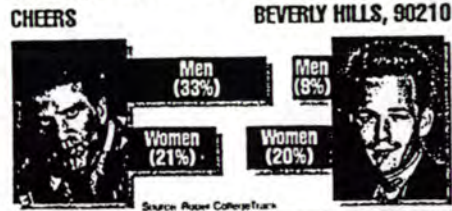
Source: Roper CollegeTrack



TM & © 1992

Where the Boys and Girls Are on Thursday Nights

Who's more popular on campuses? Ted Danson (left) or Luke Perry? Here's how their shows fared with students:



pend—more than \$25 billion total buying power—especially on stereos, clothing, music, and computers. Advertisers figure if they catch them now, before brand loyalties are formed, they've got the young consumers for life.

To Mom, Pop, teeny-boppers, too—there's why you should take a break from *Designing Women* and *Cheer* to heck out the current campus viewing habits. Like it or not, what the college crowd latches on to today, you may well be watching tomorrow, either as fledgling shows given wider exposure, or imitations trying to cash in on the latest hits. Undergrads, after all, were among the first to pronounce Burt Simpson a national hero, and the first to tune in to ABC's *Teen Prunks*, a shooting-star phenomenon that programmers are still trying to replicate in longer-lasting form.

For proof positive of student power, talk to *Letterman* producer Robert Morton. He calls their influence "obvious," adding: "The sensibility of that college age is very, very evi-



If You Can't Beat 'em, Form a Club

Arguments among small-screen-struck dorm denizens over what to watch are nothing new. A frat spat helped put Vanderbilt grad Jim Clark in business. In 1979, while battling a bothersome *M*A*S*H* contingent at his Nashville campus, he and three Phi Kappa Sigma brothers founded *The Andy Griffith Show* Renun Watchers Club (Griffith is pictured at left). It's still going strong: "Presiding Goober" Clark oversees about 20,000 members, more than 650 chapters, and a thriving newsletter.

dent here at *Letterman*. Just the whole feel of the office," Morton stays abreast of what's hot and what's not by sitting on the advisory board of the National Association of College Broadcasters, along with such other notables as media mogul Ted Turner and MTV's Doug Herzog.

No wonder, then, that MTV follows undergrads to Daytona during spring break,

hosting live shows on the sand; that Morton keeps the college music charts on his desk, making bookings accordingly; that Bob Costas schedules his *Late Show* with hip guests for college breaks. Yes, coeds are being courted—but, ironically, not counted.

The Nielsen ratings service doesn't regularly measure "out-of-home viewers," those who watch in dorms, offices, bars, hotels. And that bothers the three major networks, which have watched their share of the prime-time viewership drop from 92 percent in 1977 to 62 percent in 1991. They want to count every viewer they can get—especially the free-

Campus Sound Bite

"My friends and I have this thing, where if Hawaii Five-O comes on, we have to sit there and watch it, no matter how many episodes they run."

—Dave Mandel
Senior, Harvard University

So, just what does this trend-setting crowd hunker down to watch?

There's late-night, of course, long a student standby. *Letterman* is the clear choice among males, *CollegeTrak* says, while women are split between that show and *Arsenio*. Daytime soap operas are also popular on campuses, with Midwestern and Southern students the most likely to seek out the afternoon suds.

As for prime time, students surveyed by TV Guide agree they're bored with the big three, tired of the tried and true. "All the sitcoms are the same," says Linda Gwilym, a senior at The Evergreen State College in Washington state. "We're supposed to believe these people are normal! Problems are resolved in 22 minutes!" At her liberal, "alternative" school, whose alumni include *Simpsons*

spending, trend-setting campus crowd. "We cannot allow that level of unmeasured audience to continue, because hundreds of millions of dollars of value are not being accounted for," AIC's Montezano told *Electronic Media* magazine in a 1990 interview. NBC's Schavone calls the market "under-researched, undervalued and misunderstood."

Campus Sound Bite

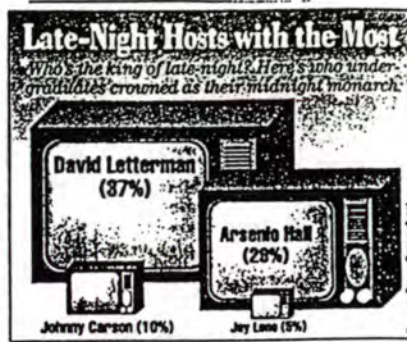
"TV is taboo here. It's the mass media and it's evil. But MacNeil/Lehrer always draws a crowd in the community center. If anyone tried to switch it to CBS, people would freak."

—David Wagner
Senior, The Evergreen State College (alumnus of *Simpsons*)
also Matt Groening

creator Matt Groening, TV definitely isn't in. But Groening's gang is, as well as almost the entire Fox lineup, which garners praise on almost every campus.

"Fox is gutsy and trendy, and the kids are excited by that," says Dr. J. Gregory Payne, chair of the Communication Studies Division at Emerson College in Boston.

From Harvard to the University of Kansas, kudos goes to such shows as *Married...with Children* and *Parker Lewis Can't Lose*, which dare to be different. Students tend to skip the mainstream, agrees Jeff Southard, who runs U Network, a satellite link of student-produced shows beamed to more than 100 campuses. His viewers want "just about anything that's



Next Week in TV GUIDE

Burt Reynolds Bounces Back

In an exclusive TV Guide interview the superstar reveals:

- his past demons (including a false rumor that he had AIDS)

- how wife Loni Anderson, son Quinton, and his TV show saved him
- a candid look at the ups and downs of his roller-coaster career.

PLUS:

Adieu to the Huxtables
A photo-filled farewell to *The Cosby Show*, featuring a tribute by Coretta Scott King. Don't miss it!

irreverent and alive. Shows that break a format and occasionally shock and bewilder. *Teen Prunks* used to be a sign of network nerve; now there's *Northern Exposure*.

Hold on to your mooses, though. Collegians also yearn for home cooking every once in a while. Something to remind them of Mom and Main Street. Old friends—some from programs older than the students themselves—like Gilligan, Mary Tyler Moore, and—best of all—Jan, Peter, and Cindy.

The Brady Bunch, alas, is hip. "It's so right it's left," says Greg Young, a senior at the University of Missouri's Columbia campus. "We say the lines to each other," he says. "It mirrors the way I grew up," says Harvard's Pereira.

Given this penchant for old and new, the trendiest of trends combines both. Witness the success of *Star Trek: The Next Generation*, which undergrads praise from Coast to Coast. Slick, they call it, the most visually exciting show by far. Racially diverse, on top of the issues. Evergreen State students filled a hall to watch big-screen episodes. University of Missouri fans post

Campus Sound Bite

"One of the biggest hits is *Tiny Toons*."

—Ken Perregé
Senior, University of Maryland, Baltimore

signs in the halls to tow in more Trekkies.

Perhaps such nouveau kitsch accounts for the newest cult hit: *Mystery Science Theater 3000* on cable's Comedy Central channel. *MST 3000* fans join host Joel Hodgson and his robot sidekicks as they watch bad movies and offer a constant comment of wisecracks. Students adore their savvy slings at such fare as "Godzilla vs. the Sea Monster." "Anyone who watches for 10 minutes falls for it immediately," says Bill Daly, a junior at Emerson.

Campus Sound Bite

"I don't think too many people here like *Bart Simpson*. He sasses his parents and has no respect for authority."

—Mike Hicks
Junior, Oral Roberts University, Tulsa

Penn State senior Bob Reap is also a *MST 3000* junkie, but since the show can't be seen at his college, he's working with Comedy Central to stage independent screenings. "It will sweep the campus like wildfire," he predicts.

Harvard sophomore Josh Lieb thinks he may understand the entire campy craze. "A lot of people our age have a stomach for bad TV," he says. "It's so rare to find anything good. I don't want to see anything that tries."

Bad TV, good TV, the truth is that while undergrads may profess to prefer high GPAs and hours at their IBMs, TV is their dirty little secret.

"This is embarrassing," says University of Kansas junior Scott Wilson. "I probably watch about 20 hours a week."

Back at Columbia's Shapiro Hall in New York, Jessica Shaw silences her troops for another night of thrills from La La Land. "Everybody here likes to say they don't watch TV," she says. "But I think it's all a lie. I totally plan my schedule around *90210*."

Mice City is a Massachusetts-based freelance writer. She graduated in 1981 from the University of Maryland, where she majored in English and Dick Van Dyke Show obsess.

HIGH HOPES

With the debut of 'Melrose Place,' Fox is out to extend its franchise on the youth market and to prove itself as a full-time network.

For Generation X, the crowd in its early 20s that finds itself psychically adrift in an increasingly complex time, Fox Broadcasting has a place in mind—*Melrose Place*. Much is riding on the hour-long drama series, which was conceived as a way for the network to extend the success of *Beverly Hills 90210* to an older demographic.

A critical component of Fox's move to a seven-night schedule this year, *Melrose Place* is the biggest test yet of whether the network can play with the big boys. Launched last week with a 90-minute premiere, *Melrose* moves into its regular time slot this week on Wednesdays at 9 p.m., following new episodes of *90210*.

Industry observers say the *Melrose-90210* pairing could make Fox almost unbeatable on Wednesday nights among 16- to 24-year-olds. The network has lined up Dr Pepper, Nike and the usual assortment of fast-food outlets to advertise on the show. National 30-second spots are reportedly running about \$125,000 (similar to prices for *90210*).

BY BETSY SHARKEY

Expectations for *Melrose Place* are high among those who track the 5.6-million strong college market—the population segment that is the show's core audience—partly because of the show's location on the schedule, and partly because of its positioning.

Although *Melrose Place* is set in one of the hippest areas of Los Angeles—the Melrose district features everything from '50s-style diner Johnny Rockets to punk clothier Retail Slut—the network is pitching the show as a state of mind. In promos, Fox has worked hard to set up *Melrose* as “a place where you fit in.” The visual subtext—a sort of James Dean, blue jeans and tortured grit—catches the vulnerable side of the show's stars, who nevertheless have the looks to insure they will slip right into the Melrose scene.

“College students right now are dealing with a great deal of anxiety about their careers, their future, their relationships,” says Stuart Himmelfarb, vice president of The Roper Organization, a leading public opinion polling firm. “A program like *Melrose Place* is a bit of empathy, a bit of release.”

Fox is counting on *Melrose* and its post-high school themes to bolster the network's standing as the choice of the young. *90210* consistently places in the top 10 among shows watched by college students, according to the Roper College Track survey, and its

audience spans all the way down to 8-year-olds.

The appeal of *90210* can be found in the show's family aspects, says Irma Zandl, president of youth market consultant Xtreme Inc. “When you get beyond all the cute girls and guys, at the core you have this one strong traditional family with strong values,” she says. “That's one of the reasons *Cheers* has been so popular with young people for so long is that it represents a really strong family.”

The apartment house on *Melrose*, like the bar on *Cheers*, is designed as a communal place where its residents are bound together as a loose-knit family. For this generation, adds Zandl, family, community and sex trigger a potent and emotional mix.

“The most powerful aspect of *Melrose Place* is that it deals with real situations,” says Andy Fessel, senior vp/research and marketing at Fox. “It is helping teens and young adults to understand the depth and diversity and challenges in their lives.”

While that may be a bit of a reach, Roper research indicates that many members of the Fox audience agree with that assessment. “Fox has come up with a formula, an attitude, that is very appealing to college students,” says Himmelfarb. “*Melrose Place* is going to represent something to trade up to for some of the *90210* college viewers.”

Chuck Bachrach, senior vp/network and programming for Rubin Postaer & Associates, says it will take several shows before *Melrose Place* can be pronounced a winner or a loser. “If they can spin this as they've done with *90210*, they could very well be on their way,” he says.

Fox has done much to give *Melrose Place* a good shot at success. It has run highly stylized promotional teasers for months and woven plot twists into *Beverly Hills 90210* to help set up the show. Some of the initial episodes of *Melrose Place* will be seeded with characters and storylines drawn from *90210*. That sort of blending has launched some of the most successful shows in TV history, including *Laverne & Shirley* (which grew out of *Happy Days*) and more recently *A Different World* (which was spun from *The Cosby Show*).

Stacking the deck further in Fox's favor is the network's franchise among college students, thanks to shows like *The Simpsons* and *Married With Children*. “Once something catches on, college is an environment in which anything spreads quickly,” says Himmelfarb. “They're watching TV in dorms, and TV viewing is much more of a social thing. So what's hot gets hot very, very quickly.” With *Melrose Place*, Fox is hoping for a very hot summer. ■



Colleges' Student Unions Face Big Test And the Answers Are on the Bottom Line

By PAULINE YOSHIHASHI

Staff Reporter of THE WALL STREET JOURNAL

Colleges and universities, squeezed by dwindling budgets and spiraling costs, are giving their student centers crash courses in Retailing 101.

At the University of South Carolina at Columbia, an on-campus mall offers everything from clothing, flowers and frozen yogurt to new hair styles, airline tickets and contact lenses. Scholars can drop by Colorado State University's expanded student union to buy a new computer, and also rent skis or hiking boots for a weekend of work and play.

Scores of other campuses across the nation now offer brand-name fast food, convenience stores, computer software, compact disks, and services of all sorts to meet the demands of an increasingly affluent student body. As higher education struggles through waves of cost-cutting, colleges are in effect turning to their own customers to keep student centers afloat.

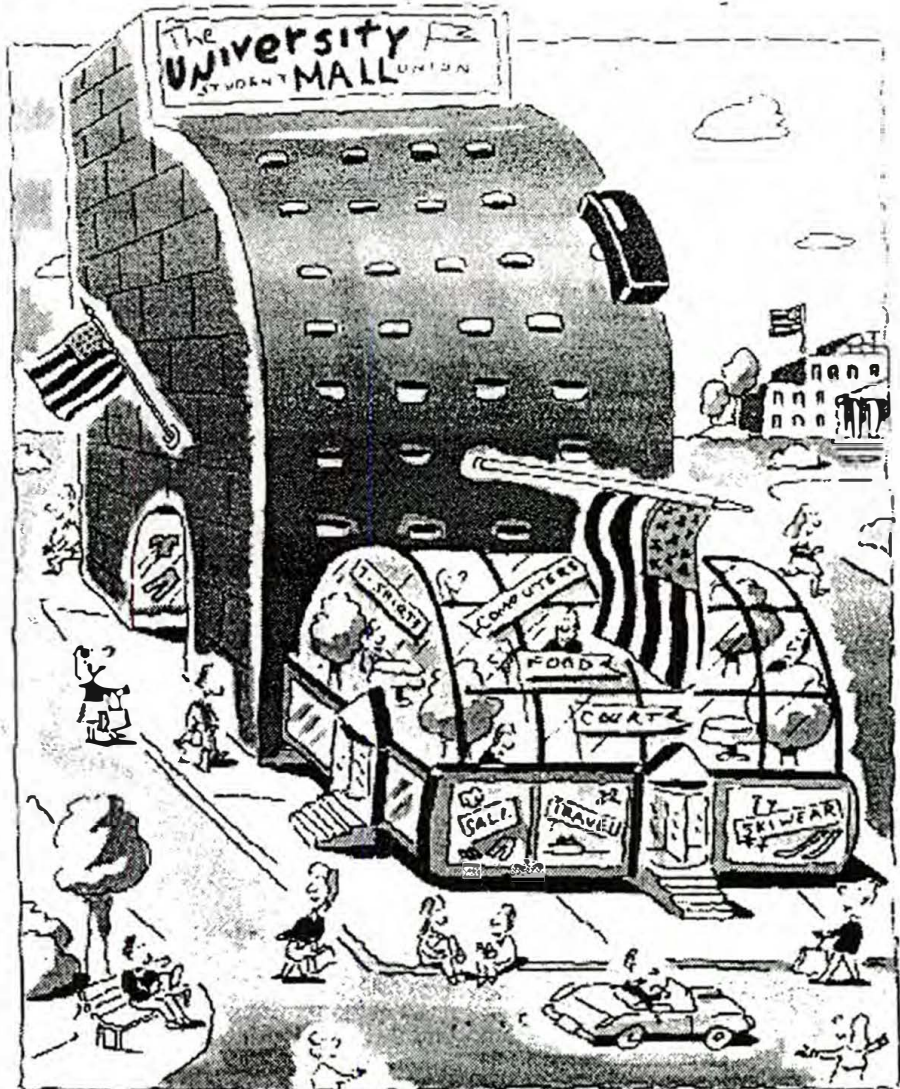
Extra Funds

"We have to better respond to the needs of our population, and become fiscally responsible, too," says Manuel Cunard, director of Colorado State's Lory Student Center. As enrollment in higher education grows only modestly from about 13.6 million students currently, schools will have to scramble for extra funds in coming years.

The Lory Center is a textbook case of the push for profitability. In the mid-1980s, it was in a jam. With \$250,000 in debt, the center couldn't meet bond obligations on the building and was in technical default.

After a quick review and a boost from another bond sale, the university began overhauling the center by converting its 450-seat cafeteria to a food court that produced a tenfold jump in revenue, Mr. Cunard says. Then came a \$1.2 million overhaul of the bookstore, which now boasts a 65-foot archway reminiscent of a suburban shopping mall and offers more soft goods along with the standard fare of books and school supplies.

The center includes a Hardee's fast-food outlet, a travel agency, ice cream parlor, hair salon, three banks and a recently opened computer hardware store. Those businesses complement the union's ballrooms and lecture halls, as well as its



Gary Zamchick

bowling alleys, video arcade, game room and outdoor-equipment rental shop.

Last year, the center produced \$18 million in operating revenue at the 20,000-student campus, and relied on student fees for less than 7% of its total operating budget. "We have about 320,000 square feet, and we're using every inch," Mr. Cunard says. Student surveys may lead to even more services, such as dry cleaning.

"College students are far more active and acquisitive, and far more experienced

as consumers than we gave them credit for," says Stuart Himmelfarb of Roper CollegeTrack, a market-research firm that specializes in college students.

Discretionary Income

The firm says students at colleges, universities and junior colleges control about \$13 billion in discretionary income, which amounts to a per-student average of \$134 a month spent on nonessential items such as

Please Turn to Page B5, Column 5

MARKETING & MEDIA

Student Unions Face An Important Test Over Bottom Line

Continued From Page B1

cosmetics, entertainment and eating out. "They're also very mobile, and very selective," Mr. Himmelfarb notes. "The challenge to retailers is to capture their attention."

Richard Wertz, vice president, business affairs, at the University of South Carolina, notes that some businesses just aren't made for colleges. "Greek logo things for fraternities and sororities work well, but you can't be selling cashmere sweaters," he says.

But mixing marketing and academia can spark some philosophical as well as practical problems.

"The idea of comparing student unions to shopping centers is one that's caused some people to bristle—it's too crass, too commercial and lacks the educational component," says J. William Johnston, assistant vice president, student affairs, at Southern Methodist University and president of the Association of College Unions-International. "But philosophically, they're the community center of campus, and malls have become that in our society."

Pragmatists argue that without money-generating student-union businesses, funds for other academic and social functions will be limited or cut off entirely. "This is a research campus, and we feel that as many resources as possible should go toward that," says James Carruthers, director of the Price Center, the student union at the University of California at San Diego. "That's part of our function."

But outside businesses can be thrust into social and political flaps, such as the brouhaha over bookseller Barnes & Noble

pulling "The Satanic Verses" off some campus shelves in 1989. "We report to the [college] administration when an issue like that comes up," says Alan Kahn, president of Barnes & Noble Bookstore Inc., which operates more than 240 campus stores under its college division.

In California, some student groups at the California State University at Northridge and other campuses have fought the opening of Carl's Jr. fast-food restaurants because of the political views of Carl Karcher Enterprises Inc. founder, Carl N. Karcher. Mr. Karcher has supported anti-abortion political candidates and proposals that some groups have called homophobic, sparking student protests. "Carl will continue to exercise his right to free speech," says Shirley Bracken, a Karcher Enterprises vice president.

Moreover, the business end isn't as easy as it may look. Marriott Corp., whose education-services unit pulls in \$670 million in revenue from 430 colleges and universities, says operators can find it tough to adjust to having a highly seasonal group of employees and customers. Most have to squeeze 12 months' profit out of the nine months when most students fill campuses, and hire and train new groups of employees more often than restaurants in

other locations.

Some student unions can be victims of their own success. Local merchants in South Carolina and elsewhere have raised a fuss over on-campus stores, arguing that a university's tax-exempt status puts off-campus small businesses at a disadvantage. Schools have run into similar spats over on-campus rock concerts and other moneymaking enterprises, and most take pains to avoid town-and-gown publicity flaps. Some invite complaining town merchants to set up branches on campus.

Despite those issues, the rush to retailing continues. Follett Corp., of Chicago, one of the nation's biggest campus-bookstore operators with more than 400 outlets, reports that more than 35% of its business on campus now stems from supplies, food, snacks and other nontextbook items. The company is branching out into coffee shops, custom publishing and other areas to bolster profit.

If students still want to go off campus to shop, the student unions might provide the wheels. "If we could figure out the space, we'd put in a car-rental agency," says the University of South Carolina's Mr. Wertz. "We're willing to try any number of things that might work."

Young America Still Fosters Entrepreneurial Ambitions

'Baby Busters' Strike Out on Their Own, but Wealth Is Not Sole Motivator

By MICHAEL SELZ

Staff Reporter of THE WALL STREET JOURNAL

The 1980s may have been the decade of the youthful entrepreneur—but so far the 1990s are holding their own.

Only yesterday, it seems, magazines glamorized one twenty-something whiz kid after another who made a fortune starting a business in a garage. Thousands wanted to follow his example—and record numbers actually did.

Now the go-go years are over. Business failures last year rose 44% from 1990, while business formations plunged 33% from their peak in the mid-1980s. Talk of getting rich quick through owning a business has gotten scarcer.

Yet a large share of America's youth still feels the pull of the entrepreneurial life. According to a long-running survey by the Higher Education Research Institute at the University of California at Los Ange-

les, 42% of college freshmen last year said succeeding in their own business was essential or very important to them. This was off from the 49% to 52% in the mid-1980s, but about the same level as in the 1970s.

An Independent Life Style

In a survey last November by Roper CollegeTrack, a unit of the Roper Organization, 38% of the 1,200 students questioned at 100 colleges said owning a business represented an excellent opportunity for a successful career. That was far more than the 24% who said the same of working for a large corporation. "Today's students are very individualistic, and entrepreneurship would be very consistent with that," says Eric Dey, the Higher Education Research Institute associate director.

If business ownership seems a less promising road to enormous riches than it

did several years ago, many young adults aren't complaining. "Ten years ago young people had the romantic view that entrepreneurship was a way to great wealth," says Paul Reynolds, a professor who teaches entrepreneurship at Marquette University in Milwaukee. "You get the sense now that they think it's a way to maintain some autonomy."

Moreover, far from discouraging young people, economic hard times actually makes business ownership seem more appealing to some than risking arbitrary cutbacks at a big company. "This generation of students is facing a high level of anxiety, far more than they ever thought" they would, says Stuart Himmelfarb, a Roper vice president. In such an environment, "they're saying the best way to get ahead is to start your own business."

Baby Buster Values

The nation's 48 million "baby busters," generally defined as 18-to-29-year-olds who grew up in the shadow of the 77 million baby boomers, also say that getting ahead means more than finding work in a shrinking job market or making loads of money. They also are looking for greater job satisfaction and independence.

"A lot of hot-shot guys go out and make a million bucks as entrepreneurs, but that was never a goal for me," says Christopher Good. At age 26 two years ago, he founded Good Food Systems, a Cincinnati provider of bar-code scanning equipment to school cafeterias. "I knew I'd be OK if I did something I was happy doing and was in control of my life."

Another entrepreneur, 26-year-old Mark McWilliams, says he started his paint contracting firm in 1988 because he wanted the freedom to "channel my energies in any direction I wanted. I wanted to do things my own way."

Mr. McWilliams says he built the firm's sales to \$200,000 annually before enrolling last year in the M.B.A. program at the University of Massachusetts at Amherst. After getting his degree, he says, he may work for another firm to improve his business skills. But he intends eventually to start another company.

Conforming to the culture of a big company would stifle his creativity, Mr. McWilliams says. "I'd be selling myself short in a corporate environment," he adds.

Popular Programs

Ann Abady, a 22-year-old senior at Baylor University in Waco, Texas, says that as an entrepreneur, "you don't have to go with the flow." And if she goes into business for herself, it won't be for self-fulfillment only; she also wants to help society. "I've always wanted to find a need in the community and create a business to fill it," she says.

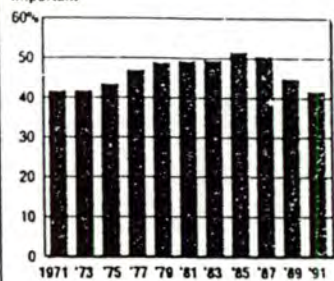
Baylor is one of two dozen or so universities that began offering entrepreneurship majors in the 1980s to meet growing de-

mand from students. Today, such coursework is as popular as ever. Indeed, the major is so highly coveted at the University of Arizona in Tucson that half the students who apply for it are turned away. Britton Dornquast, an Arizona entrepreneurship graduate who last year opened his own music store, says he raised \$40,000 to fund the venture with a business plan he developed in school. His success "was a direct result of that program," he says.

Freedom isn't the only motivating force for today's starting entrepreneurs. "I

Tomorrow's Entrepreneurs

Share of college freshmen who say succeeding in their own business is essential or very important



Source: Higher Education Research Institute UCLA

agree there's more to life than money, but we all want a life style that only a certain amount of money gets us," says Thomas Knapp, the 27-year-old founder of Club Sportswear Inc., a clothing maker in Irvine, Calif., where he says annual sales reached \$10 million last year.

To many, contributing to society also ranks highly. "I want to be a person who 20 years down the road can look back and say, 'I was instrumental in creating something. I left a mark,'" says Vishal Agarwal, a 20-year-old finance major at the University of Arizona.

Inevitably, some entrepreneurs throw all their energies into their businesses at the expense of almost everything else—just as they always have. Keith Alper, the 29-year-old founder of Creative Producers Group Inc., a St. Louis supplier of corporate-training videos, admits he's a workaholic. "I'm married to my business," says Mr. Alper, who puts in 12-hour days and works on weekends. "I'm losing my hair. People say I look 35."

But freedom of action appears to be a particularly important entrepreneurial driving force of the 1990s. Mr. Knapp, Club Sportswear's founder, says he cherishes a life style that enables him to "do whatever I want when I want."

Most of all, in spite of the long hours he puts in, this includes being with his wife and child. "I'm not a workaholic," he says. "My family is my priority, way before my business."

SINCE 1969 THE INDUSTRY'S LEADING NEWS AND ADVISORY SERVICE FOR CREDIT/DEBIT-CARD EXECUTIVES

STUDENT MARKETING — Part I College campuses hold more new cardholder prospects with long-term profit potential than any other identifiable segment of the U.S. population. The cost to card issuers of acquiring and servicing new student accounts during the early years can be three or four times more than other segments of the population, but can still be more profitable in the long term. Students tend to ... (turn to page 5)

Student Marketing (from page 1) ... remain loyal to issuers that grant them their first line of unsecured credit, keeping their original accounts an average of 15 years. They are less likely to become delinquent and their charge-offs are lower, largely because of no bankruptcies.

American Express and Sears were first of the major credit grantors to conduct large-scale student-marketing programs 15 years ago, although Diners Club pioneered the idea in the mid-sixties. Diners dropped out and Sears stopped promoting its store card in favor of Discover, which is one of the first to wisely invest in precollege promotions — the next big wave in youth marketing. Freshmen, once overlooked as potential customers, are getting more attention because so many in the upper classes already have cards.

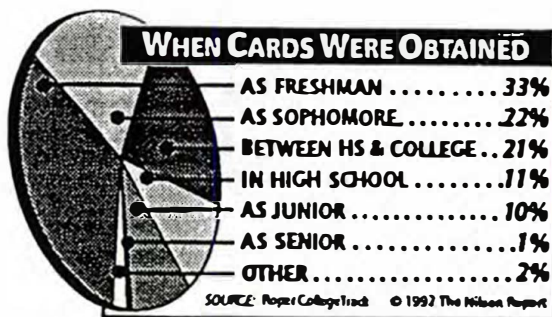
Promotions to students at trade and technical schools, formerly considered off-limits as unstable credit risks, are also showing promise because of new scoring procedures that allow issuers to more carefully monitor individual spending and repayment patterns.

Promotions to students on all U.S. campuses this year are expected to generate 3.65 million applications. At an average reject rate of 42%, that should produce 2.12 million new accounts. The largest chunks will go to Citibank, Chase, American Express, and Discover. All four use an efficient mix of promotion options listed here. Maximum penetration can be achieved only by selective use of all available distribution, media and research resources including professional help from leading firms in this business shown on the next page.

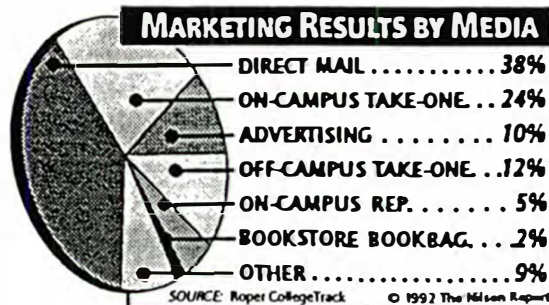
THE 1992-93 COLLEGE MARKET

STUDENTS18,572,000	SCHOOLS4,680
Full Time.....57% Part Time.....43%	Private.....54% Public.....46%
Trade & Technical...5,086,500 Two-Year.....5,160,600 Four-Year Only.....795,000 Four-Year + Grad.....7,406,400 Graduate Only.....123,500	Trade & Technical.....1,200 Two Year.....1,454 Four-Year + Grad.....1,134 Four Year.....640 Graduate Only.....252
Male.....48% Female.....52%	Live on Campus...21% Live off Campus...79%

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Roper CollegeTrack is the definitive study of the college market released this month, based on interviews with 1,200 full-time undergraduates on 100 four-year campuses. It reports students' financial resources, employment levels, interests in products and services, attitudes toward the economy, and career prospects. Other information includes credit-card ownership by issuer, student attitudes toward cards, and use of financial products including checking and savings accounts. "Financial Services" study costs \$8,000. "Lifestyle and Media Study" issued three times a year costs \$10,000. Four reports combined cost \$16,000.



Television Becomes Basic Furniture In College Students' Ivory Towers

By SARA RIMER

Brice Pender arrived at the University of North Carolina with the usual assortment of student gear: posters; dictionaries, thesaurus and a set of Shakespeare plays; microwave, tape deck, pillow embroidered by his grandmother — and his 19-inch remote-control Magnavox with a VCR.

Students used to leave behind the world of television when they went to college. Twenty years ago, TV sets tended to be found in dormitory lounges and fraternity and sorority houses, not so much in individual rooms. Now televisions are nearly as common as stereos. This generation of undergraduates grew up on "Sesame Street," now in its 23rd season, and moved on to MTV. For them, television has been ubiquitous, and it remains a big part of their lives.

"TV is their collective dream machine, their temple, their sense of being members of a nation," said Todd Gitlin, professor of sociology at the University of California, Berkeley, and author of "Inside Prime Time" (Pantheon, 1985). "It's as if they're carrying their pews with them. They've always watched 'L.A. Law.' They can't imagine a world without it. It's normal. College is one episode in this unfolding normality."

There is little research on the television habits of college students. Nielsen Media Research measures viewing only in American households, which excludes college dormitory residents along with people who watch in bars, hotels and hospitals. Nielsen has determined, however, that in 1990, of those watching television outside the home, 21 percent were at colleges.

Cable in Every Room

In addition, three-quarters of 1,500 undergraduates surveyed last spring for Roper CollegeTrack, a market research service based in New York, had their own televisions at college. Half those sets were connected to a VCR, and half received cable. Two years ago, the University of Southern California in Los Angeles installed cable in all student apartments; last summer, by popular demand, the service was made available in all dormitory rooms. The \$11 monthly fee for basic service is tacked onto the rent.

"I don't necessarily equate cable with academics," said William B. Thompson, director of housing for residence halls at U.S.C. "But today's students want it, and they seem to be able to handle it. We haven't seen a drop in grade-point averages or a rise in the drop-out rate."

But Professor Gitlin, of the University of California at Berkeley, says television may be eroding the college experience in ways that can't be measured. "One thing that students are giving up when they wire themselves into television is solitude," he said. "They're not alone. They're always accompanied. TV is a release from having to think, to feel deeply. It's all about yuks and easy sentimentality."

Mark Naison, a professor of Afro-American studies and history at Fordham University, was an undergraduate at Columbia 25 years ago. He can't remember anyone with a television in his room. "Television was about big events then," Professor Naison said. "We would get to-

gether in lounges and watch the Presidential election, the Cuban missile crisis, the World Series. People didn't watch any other type of show. Television was not as central to people's lives then as it is now."

Bonded by 'The Brady Bunch'

Today's students still count on television for the big events. They were riveted by the Clarence Thomas-Anita F. Hill hearings along with everyone else. But they also watch, and talk about, a lot of other programs.

"I'll watch 'The Brady Bunch' over and over," Michael Platzman, a senior at Columbia College who is majoring in biomedical engineering, said the other evening while watching "Bugs Bunny" in the lounge in his dormitory. "I don't know why. Television relaxes me."

Television, from "Sesame Street" to "The Brady Bunch" to "The Simpsons," has become the common culture of today's college students. The undergraduates surveyed by Roper watched an average of 18 hours of television a week. The 10 programs they watched most frequently included one daytime soap opera ("Days of Our Lives"), two late programs ("Late Night With David Letterman" and "Saturday Night Live") and

TV as ritual and recreation of the 'Sesame Street' generation.

three Fox programs ("The Simpsons," "In Living Color" and "Married... With Children").

Their favorite program was "Cheers," followed by "The Cosby Show" and "The Simpsons." This season Fox's "Beverly Hills 90210," about a group of students at West Beverly Hills High School, has become a favorite on college campuses. Mr. Pender, at U.N.C., rarely misses an episode. So engrossed are some women at Barnard College that they program their telephones to phone mail when it is on so they won't be disturbed.

Getting to Sesame Street

But if there is one program that defined all their childhoods, it is "Sesame Street."

"'Sesame Street' was my life," said Anna Smith, a freshman at Columbia.

"I still watch 'Sesame Street,'" said Matthew Beskind, a freshman at New York University. "But I can't watch Kermit the Frog. They have a new person doing his voice, and it's wrong." (Jim Henson, who was the voice of Kermit the Frog as well as Ernie, died last year.)

Television has been blamed for everything from short attention spans to creating a generation of overweight couch potatoes. But just because they have televisions in their rooms — or down the hall, in the lounge — doesn't necessarily mean that today's college students are all numb, passive watchers. During visits to a number of campuses across the country, students themselves were critical of the medium that has

dominated their lives. And they were unanimous in saying that music is still much more important than television.

"TV's turning us into a mush nation," said Jed Meyer, a Columbia senior. Mr. Beskind, who hopes to be a film maker or a novelist, said he thought the Harry Levinson movie "Avalon," which charts the emergence of television in one Baltimore neighborhood, got it right. "Nothing's on, and they all sit around watching it," he said. "TV destroyed the American family. Adults come home from work and watch TV. It cuts off communication."

Sharing in the Stupid

Michael Moffatt, an associate professor of anthropology at Rutgers University, spent two years in the late 1960's living in an undergraduate dormitory at Rutgers for his 1989 book, "Coming of Age in New Jersey," published by Rutgers University Press.

"One of my more significant findings is that students watch less TV than the average adult," Mr. Moffatt said. "They're studying, talking, schmoozing and chasing males or females."

Mr. Moffatt did discover what he calls "the ritualistic social viewing of something funny, like 'The Simpsons.'" Ms. Smith, Ms. Platzman and the other students on their floor still complain about the fire drill during the show's season premiere this fall. They also watch "Jeopardy" together. That's because 18-year-old Andy Westney, from Atlanta, lives on their floor. Mr. Westney, whose "Jeopardy" specialty is literature and poetry, won \$25,000 on the show last year.

"Watching television in your room is lonely," Mr. Platzman said.

There is also the ritualistic social viewing of something funny, like "The Simpsons." Ms. Smith, Ms. Platzman and the other students on their floor still complain about the fire drill during the show's season premiere this fall. They also watch "Jeopardy" together. That's because 18-year-old Andy Westney, from Atlanta, lives on their floor. Mr. Westney, whose "Jeopardy" specialty is literature and poetry, won \$25,000 on the show last year.

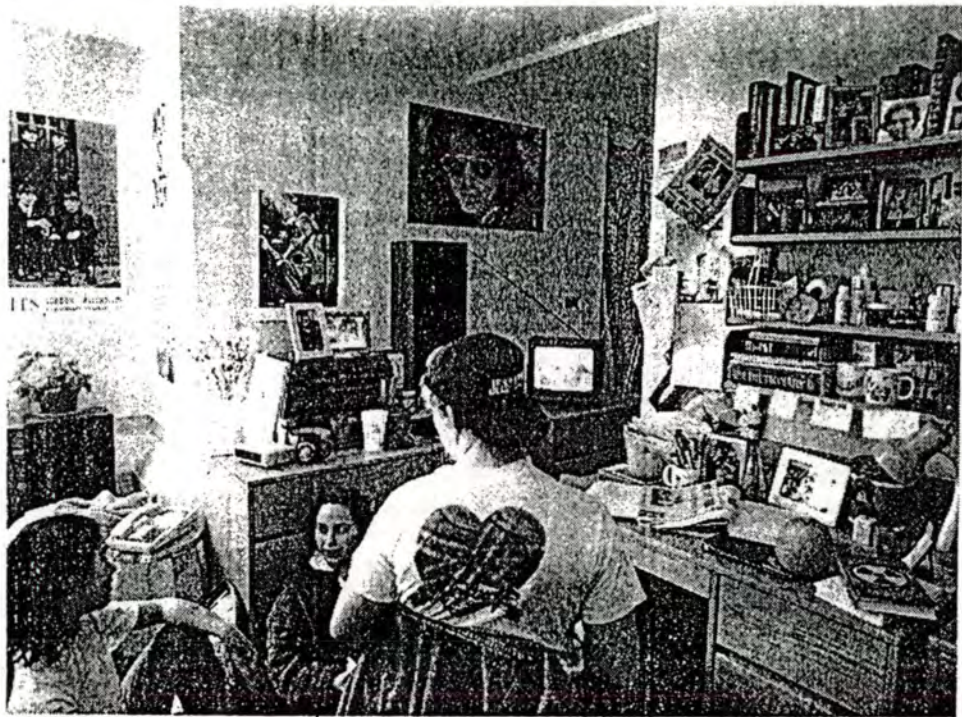
There's Always Books

At New York University, Mr. Beskind says he gave up on television after "Moonlighting" went off the air. "When 'Moonlighting' died, all of TV died," he said. "It's worthless."

Rebecca Chew, a senior at New York University who is majoring in English and American literature and preparing for law school, says she spends eight hours a day studying in the library. But every Thursday between 9 and 10 P.M. Ms. Chew is on her bed in her dormitory room with the door closed and her TV tuned to "Beverly Hills 90210."

Ms. Chew said her father would never have allowed her to watch a show like "Beverly Hills" when she was growing up. "He controlled the television," she said. "It was always tuned to Channel 13 or the news."

She said she found her father's programs so boring that from an early age she retreated to her room to read. In high school, she was reading Emile Zola and Ayn Rand. For Ms. Chew, college has been a time to discover television as well as James Joyce. And as far as television goes, "Beverly Hills 90210" or not, she says, she has a son named that she was not missing much.



Angel Franco/The New York Times

Televisions have become nearly as common as stereos in individual rooms in college and university dormitories. Sumi Sakata, left, Tiffany Smythe and

Andy Westney, back to camera, who was a teenage "Jeopardy" champion last year, relaxed in a dormitory room at Columbia University.

TRIFLEND

Drug stores target student buying power

College towns gear marketing plans toward influential college sect

By Christine Bizzarro

College students continue to wield considerable buying clout in markets where they go to classes, study for exams, cheer at football games, make lasting friendships, and hopefully earn that sheepskin when it's all over.

Retailers who operate in these markets — which are really self-contained consumer markets — are making a conscious effort to cater to their needs as students and young adults. *Drug Store News* spoke with retailers who operate drug stores in six major U.S. college markets, and found that each one has a unique way to sell to the college student.

CollegeTrack, a market research and consulting firm, calculated that nationally, students at four-year and two-year colleges possess about \$41 billion in personal buying power, with grad students representing another \$19 billion in average annual personal buying power. (See sidebar.)

The college market is dynamic, the report said. Only 60 percent of undergrads today attended school at the same campus last year; thus, 40 percent of students are entering a new campus environment. What's more, the campus has also changed for the 60 percent who returned to school: returning students are meeting, and being influenced by, the broad array of new students who are living on campus for the first time.

Surveys track use of H&BA, fragrances

Here are some highlights of the 1989 General Tracking Study and the annual H&BA/Cosmetics/Fragrance Category Study, both conducted by CollegeTrack, Inc., a supplier of college market information. (CollegeTrack conducts four national marketing and media surveys each year, interviewing 1,350 full-time undergraduates and 150 graduate students on 30 campuses across the country.):

- 44 percent of undergraduate women and 42 percent of undergraduate men reported they bought a fragrance for themselves in the past three months; the overwhelming majority of these purchases were class brands.
- While female and male students' fragrance tastes run to class brands, college women prefer mass brands of cosmetics; in most cosmetics cate-

gories covered in the study, between two-thirds to 90 percent bought a mass brand.

- Nearly half of all undergrads reported they buy sun protection products; many also report that they equate a tan with looking healthy and attractive.
- 75 percent or more of undergrads report a purchase of toothpaste, shampoo, soap and deodorant in the past month.
- Approximately 50 percent bought conditioner, analgesics and razor products in the past month.
- More than half of college women reported buying tampons in the past month, and somewhat more bought a product to help relieve menstrual cramps.

AMERICAN DEMOGRAPHICS®

JUNE 1991

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COLLEGE NEWSPAPERS SCORE HIGH-GRADE READERS

"College students are shopping from their own lists for the first time in their lives," says Stuart Himmelfarb, president of CollegeTrack Inc., a market research firm based in New York City. "It's much easier to get their attention when they're buying for the first time, and if you reach them now, you don't have to convert them later."

College newspapers reach a small, well-defined group of people at a critical moment. More than 40 percent of college students surveyed by CollegeTrack had read all of the last five issues of the campus paper. That's why many college papers are prospering, even as the big dailies struggle.

Most college newspapers serve a narrowly defined market. About 2,400 college papers now reach 8 million U.S. students. Undergraduates at four-year colleges control over \$6 billion in discretionary spending during the school year, according to CollegeTrack.

On a cost-per-thousand basis, reaching a college newspaper reader is usually more expensive than advertising in a general-focus daily paper. But the common bonds of readers make college papers an easier sell to the advertising community, says David Knott, coordinator of operations for the *Daily News* at Ball State University. Agencies such as CASS Communications of Evanston, Illinois, which represents 100 daily and 800 weekly college papers, make it easy to reach a big audience.

"The market is so concise that we're able to specialize. We know it better than anyone else," says Ed Barber, general manager of the *Independent Florida Alligator* (circulation 31,000), which serves the University of Florida in Gainesville.

According to a 1988 Roper Organization survey, 64 percent of all college students read their

campus newspaper. Those most likely to read it are women (70 percent, compared with 57 percent of men) and freshmen (70 percent). The share of readers decreases as they go through school: only 58 percent of seniors read the paper. Students who live on campus are also more likely to read the paper (70 percent) than those who live in town (61 percent) or with their families (51 percent).

Students want to stay informed about their community. News about what's happening on campus ranks fourth on a list of subjects provided by Roper, behind national and international affairs, career information and job markets, and health and fitness. But relatively few students care about local sales or specials (14 percent).

Marketers need to be careful when advertising in a college paper. The old images don't work on a new generation. A majority of students are offended by the "Animal House" stereotype of a beer-swilling, destructive fraternity party. In fact, more than half of all students (53 percent) now consider alcohol abuse to be a major problem on campus, according to Roper. This is dramatically higher than their concern about nonviolent and violent crime (27 and 18 percent, respectively, view these as major problems on campus), drug abuse (20 percent), and AIDS (8 percent).

A few campus papers have been very successful. The *Alligator* has been self-supporting since 1973; it recently purchased a building and a local weekly newspaper that will be run as a subsidiary.

In the 1990s, college students will be a prime target market because they are somewhat insulated from downturns in the general economy. "Our readership has a stable income," says Knott. "If times get hard, students still have money coming from home."
—Susan Krafft



AMERICAN DEMOGRAPHICS®

SEPTEMBER 1991

Food

COLLEGE CUISINE MAKES MOTHER CRINGE

WHEN PARENTS SEND THEIR CHILDREN off to college, they might entertain the notion that their little darlings, having been brought up with the four basic food groups, will continue to practice impeccable dietary habits. Little do they know that their children will skip meals, guzzle soda by the case, and subsist on a diet that would make mother cringe.

What do college students buy with their food money? Since they often cannot choke down the turkey tetrazzini or tofu stroganoff served in the campus dining hall, they will turn to whatever happens to be cheap and available. Pasta in all shapes and sizes is a popular meal. It's easy, cheap, filling, and versatile. When it is buried in different sauces, a student can almost fool herself into believing that she hasn't eaten it for five days straight.



Quick and easy meals are most attractive to students, so the microwave plays a

major role in students' lives. Half of all students say they use a microwave

every day, reports Roper CollegeTrack, an annual survey of student behavior and attitudes.

Cereal is another staple in the undergraduate kitchen. Two-thirds of undergraduates surveyed by Roper CollegeTrack say they bought a box of cereal in the

last month. There are some college students who stock three different kinds of cereals, one for each meal. The day begins with a huge bowl of Lucky Charms and ends with a candle-light dinner of Froot Loops. There is also the famous "bagel diet." Three bagels a day might not be very nutritious, but bagels can be consumed while running for a bus. They also fit very nicely in the front pocket of a backpack.

On every college campus, there are at least a handful of restaurants and snack bars that cater to the dietary habits of students. Pizza and subs are featured prominently, but they often share the spotlight with chicken wings, fried mozzarella sticks, onion rings, french fries, and any other grease-intensive snacks the cook can think of.

Far and away the most popular food is pizza, according to the 1990 MTV Roper CollegeTrack report. More than half of all students say pizza is their favorite food. Second place falls to hamburgers, which gather only 7 percent of students' votes.

In dorm rooms, where students are usually limited to a cube-sized refrigerator to store foods, nonperishables are often the

products of favor. Many students have milk crates shoved under their beds that are filled with Oreos and Chips Ahoy! cookies, Cool Ranch Doritos and potato chips, Twinkies, and other tempting foods from the candy and snacks aisle at the supermarket.

Exam time destroys all remaining shreds of dietary restraint. In an attempt to "pull all-nighters," huge quantities of coffee and soda are consumed. The sodas of choice are either Mountain Dew, which contains the greatest amount of caffeine and sugar of any mainstream soft drink, or Jolt, the eye-opening soda that proudly claims to have twice the caffeine and all the sugar of regular Coke or Pepsi. Jolt

Some college students stock three different kinds of cereals, one for each meal.

starts appearing in campus stores right around exam time, and it is often used to wash down a Vivarin or NoDoz caffeine pill.

Because of this hedonistic binging, some students go on crash diets after exams. Forty percent of all students say they tried to lose weight by dieting in the last year; 60 percent of women and 25 percent of men dieted. These diets usually are not endorsed by any medical authority, but can be quite creative. There is the Slim-Fast and beer diet, the broccoli diet, the chocolate-chip cookie diet, and anything else that sounds like it would come under the heading "lose weight fast" in the *National Enquirer*.

College is a time for breaking away from the ideals that mom and dad professed. It is a time for new experiences, a time to expand one's horizons. More and more, it is also a time to discover the therapeutic qualities of Pepto-Bismol.

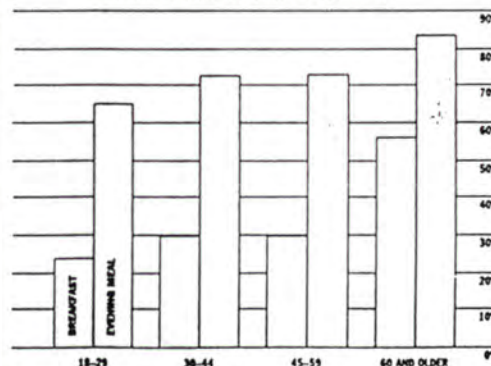
—Susannah Baker,

Class of 1993, Rutgers College

We Gather Together

Few young adults bother to eat breakfast with their housemates, but most people eat supper together.

(percent of adults in multiple-person households* who eat with other household members on weekdays, by age and type of meal)



* Based only on adults who do not live alone.

Source: The Roper Organization, 1991

Roper CollegeTrack™

Roper CollegeTrack is the leading market research and consulting service specializing in the college market. *Roper CollegeTrack's* syndicated and custom studies provide marketers and advertisers with comprehensive information on students' lifestyles, attitudes, purchases, media and leisure activities. *Roper CollegeTrack* has been named to *American Demographics Best 100 Sources for Marketing Information* for 1991, 1992 and 1993.

Roper CollegeTrack consists of six national studies per year. This service has been reporting on the college market since 1988. Each study includes in-person interviews with 1,350 full time undergraduate and graduate students conducted at 100 campuses nationwide. These campuses comprise a nationally representative sample of college students.

Roper CollegeTrack is the comprehensive and authoritative source of marketing and media information about this active, but elusive, segment.

MEDIA—Roper CollegeTrack is the only third party source of media data, including television (broadcast and cable); radio (general audience and college stations); readership of general and college-oriented publications (newspapers and magazines), and unique college-targeted out-of-home media.

CONSUMER ACTIVITIES—Roper CollegeTrack measures students' purchases by brand in dozens of major product categories, from soft drinks and athletic shoes to paper towels and personal care products. We also examine location of purchase, to capture the variety of on- and off-campus retail locations frequented by students.

IN-DEPTH CATEGORY STUDIES—Annual studies covering important industries, including The College Automotive Report, The College Financial Services Report and The College Consumer Electronics and Computers Report.

Roper CollegeTrack

CUSTOM ANALYSES AND PROPRIETARY QUESTIONS—every survey offers subscribers opportunities for specialized analyses and proprietary questions to address their particular information needs.

CUSTOM STUDIES—*Roper CollegeTrack* is a full service provider of custom research services, with a field force and research methodologies in place to meet the needs of marketers and advertisers.

- Custom studies (national, regional or local in scope).
- In-person interviewing conducted on campus, or telephone interviewing (*Roper CollegeTrack* maintains a list of student telephone numbers including campus and home numbers.)
- Proprietary methodology for evaluating the impact of campus promotions and events.

CONSULTATIVE SERVICES—*Roper CollegeTrack* management is available for consultations and presentations. These can be scheduled at any point in the college marketing development process, and have been successfully used by clients who want to assess their potential in this market, as well as by experienced college marketers.

Roper CollegeTrack Benefits

- Easy to use
- Comprehensive
- Timely - six national surveys each year
- Flexible - client input is welcome at all stages
- Customized - on-site presentations apply results to your business
- Cost-efficient

Costs: \$ 10,000 for the 3 waves of the Lifestyle and Media Study
(Category studies available at additional cost).



For further information on Roper CollegeTrack, please call:

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(212) 599-0700

The Roper High School ReportTM

Roper CollegeTrack, the leading market research service specializing in the college market, announces the release of its first high school study, The Roper High School Report.

The Roper High School Report is the first study of 10th-11th-12th graders designed to be directly compatible with research among college students. As a result, in addition to capturing the attitudes, lifestyles, purchase activities and media habits of high school students, the report offers unique insights into the transition from the teen and high school years into college.

The Roper High School Report is based on more than 500 in-home interviews with a nationally representative sample of high school students. All interviews were conducted by Roper field interviewers.

The Roper High School Report captures comprehensive information about this active segment:

MEDIA—television (broadcast and cable, including MTV, VH-1 and "The Box"); radio; magazine readership. TV data cover time spent with television by daypart as well as program preferences and viewing of new programs.

CONSUMER ACTIVITIES—The report explores students' brand preferences and past week incidence of a variety of activities, ranging from shopping, eating out and movie-going to bottled water and credit card use.

IN-DEPTH CATEGORY DATA—The report focuses on high school students' experiences, attitudes and plans in terms of important categories, such as cars, financial services, long distance telephone service, consumer electronics and computers.

Costs: \$10,000 (\$15,000 as a package with the Roper Youth Report)



For further information on The Roper High School Report, please call:
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The Roper Organization

SUMMARY OF SYNDICATED SERVICES

ROPER REPORTS™: A comprehensive survey of American consumers' attitudes and behaviors designed to track consumer trends and identify emerging changes in buying patterns and attitudes.

- **ROPER REPORTS** consists of 10 waves of interviewing per year, and has been in existence since 1973. The database of more than 350,000 in-depth personal interviews provides a strong foundation to distinguish mere "fads" from real trends.

The Public Pulse™: a monthly newsletter that distills the key consumer trends and industry highlights uncovered in recent Roper studies.

Roper CollegeTrack™ and Roper High School Report™: studies of the lifestyles, media and marketing behaviors of today's critical youth segments —

- **Roper CollegeTrack** measures the important influential young adult segment and offers comparisons to the total young adult segment (18-29 year olds) from Roper Reports data.
- **Roper High School Report** is a parallel study conducted among high school students throughout the U.S.

Roper Youth Report™: an annual study of the youth market to identify the changing lifestyles, attitudes and behaviors of today's 8-17 year olds.

Green Gauge Reports™: an in-depth research service that measures the strength and direction of the environmental movement in the U.S. from three distinct perspectives: consumer attitudes and behaviors, ratings of government regulatory agencies, and perceptions of business and industry groups on environmental good citizenship. Incorporates the benchmark Green Gauge Segmentation that classifies consumers according to their environmental behaviors.

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For further information about Roper syndicated or custom research services, please contact:



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