

UNiDAYS | GEN Z INSIGHTS



BACK TO CAMPUS 2022

Will you stand out for all the right reasons?

Gen Z students will let you know, either way.

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BACK TO CAMPUS 2022

Computers. Clothes.
Groceries. Bathroom
supplies. Cosmetics.

These are the things most Gen Z students can't be without, proven by our annual data dive into their purchasing plans for 2022.

The research was carried out in a quantitative interactive survey of students in the UK and US, conducted via our CRM and "The Counsel", our community panel. The survey received **1870 responses from the UK** and **1097 responses from the US**.

Our Back to School report highlights key insights from the survey data, giving you a critical advantage when it comes to influencing Gen Z's purchasing decisions.

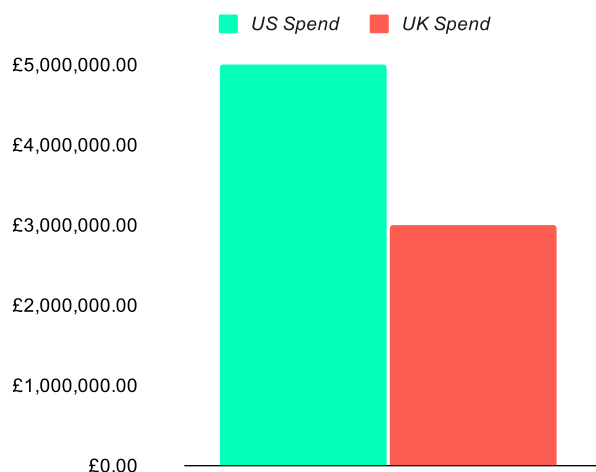


Gen Zs projected spending for 2022—key findings

The Gen Z UK student population is worth around £4.17bn, coming in at £22.36bn for the US.

UK students are expected to spend over **£3bn**, while US students are expected to spend well over **£5bn**. And on average, Gen Z students are **planning to spend 20% more than the previous year (2021)**.

Back to Campus Annual Spend: US vs UK(GDP)



UK & US Students vs UK Freshers & US Freshmen: How do they differ?

Getting specific, UK students are each projected to spend **£1027** for the new academic year. This stands at **£1122** for US students. UK freshers will spend **18% more** than their senior year counterparts: **£1214**. Meanwhile, US freshmen will spend **13% more**: **£1268**.

With that said, let's take a closer look at the nuanced spending behaviours of Gen Zs >>>

Note: the following figures are based on implied behaviour. That is, what Gen Z UNiDAYS members say or predict they'll purchase. The rising cost of living could also impact these predictions as Gen Zs tighten their purse strings in response.

£1,027

Average spend per UK student

£1,214

Average UK First Year spend

£1,122

Average spend per US student

£1,268

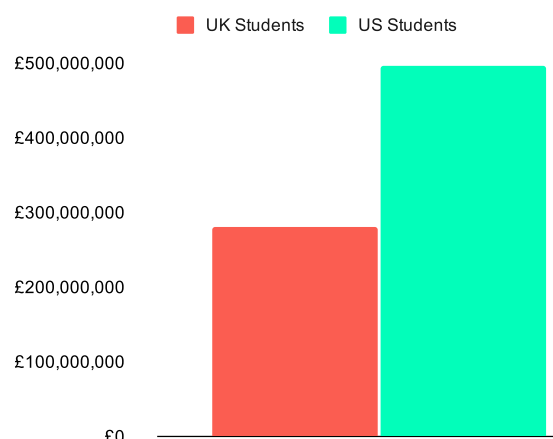
Average US Freshmen spend

62% of UK students will buy food and drink from supermarkets, such as Tesco, ASDA, ALDI, Sainsbury's and Lidl.

63% of US students will also get their sustenance from grocery stores including Walmart, Target, Whole Foods and ALDI.

But that leaves a large proportion unaccounted for. Refusing to believe nearly **40%** of the student population are on liquid diets, we looked into this further.

Food & Drink Annual Spend: US vs UK (GDP)



For food and drink, the projected 2022 annual spend for UK students is £281m, which jumps to £496m for US students.

75%

Of UK freshers buy their own food & drink

65%

Of UK members (years 2-4) buy their own food & drink

The missing 40%

One in three students will be living at home either because their education is online or they're attending a place of study near their family home. Potentially eliminating the need to shop for groceries, this may account for much of the missing **40%** who aren't shopping at stores.

19% of US college and university students will be living on-campus using pre-paid meal plans. This could also account for a portion of the **40%**.

This suggests older Gen Z students plan to live at home, eat out more often, or perhaps even pool shopping when living in shared accommodation. There's only a **1%** difference for US students, which could mean they stay in similar housing situations throughout their university years.

What's more, **26%** of US students plan to use a food delivery or take-out service, while **10%** of UK and **7%** of US students will subscribe to a recipe box service.



Our Solution

What does this mean for brands?

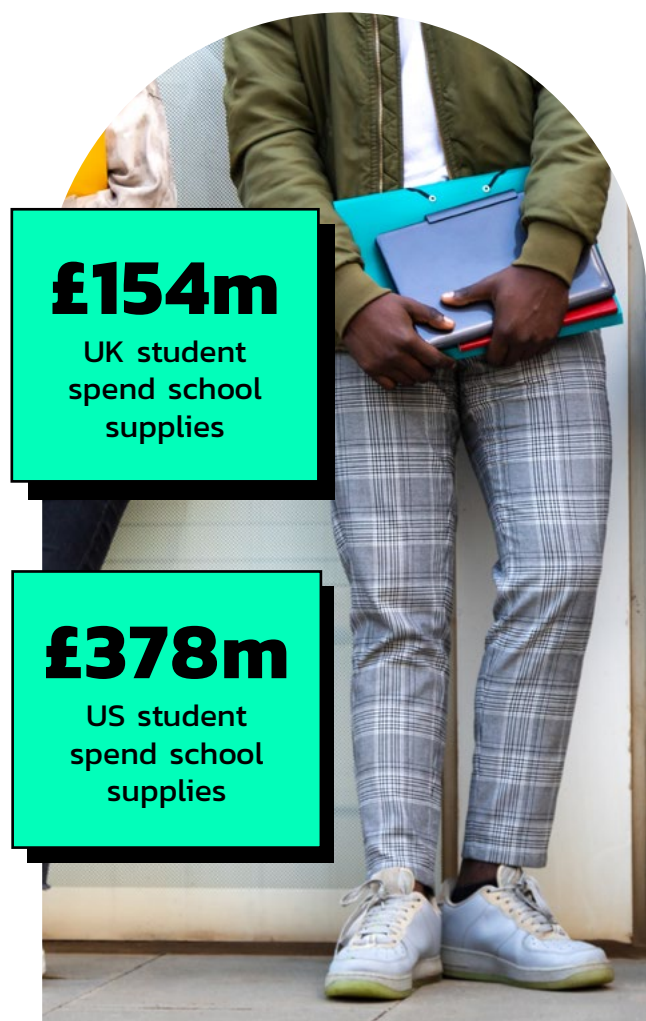
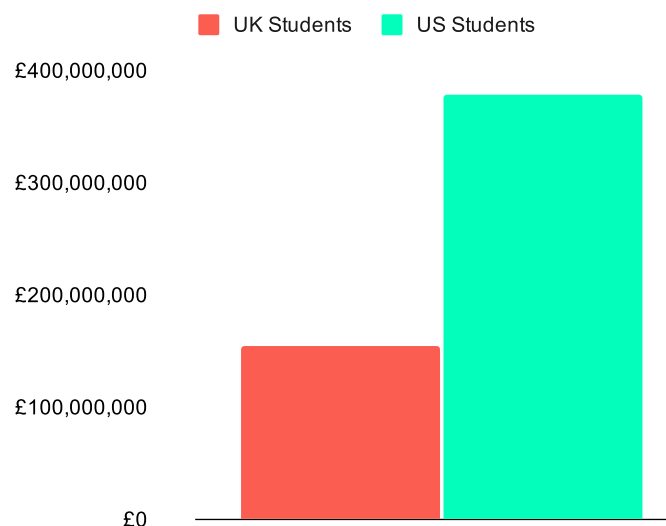
There's ample opportunity here to cater to student needs. Partnerships with take-out and delivery services, rewards for loyalty and messaging around pool shopping will appeal. Deals are appreciated too.

One US student recently told us: "I'd love to see more discounts and promotions for students to help ease the financial burden of going to school and the expenses that come along with it."

UK Gen Z students plan to spend £154m on school supplies. This rises to £378m for US students.

That's a big difference in spend! We know that both US and UK students are able to rent textbooks and access them at libraries, so this likely doesn't account for the fact that US students are spending significantly more on school supplies than UK students. Whatever the root cause, global and US-focused brands have a huge opportunity here

**School Supplies Spend:
US vs UK (GDP)**



27% of UK students will buy their school supplies at a supermarket, favouring Tesco and ASDA. Retailers such as Wilko, WHSmith and Amazon are also popular for stationery.

In the US, 24% of Gen Z students will buy from an office supply store such as Staples or Office Depot. Saying that, Target, Walmart and Amazon remain popular places to fill a pencil case.

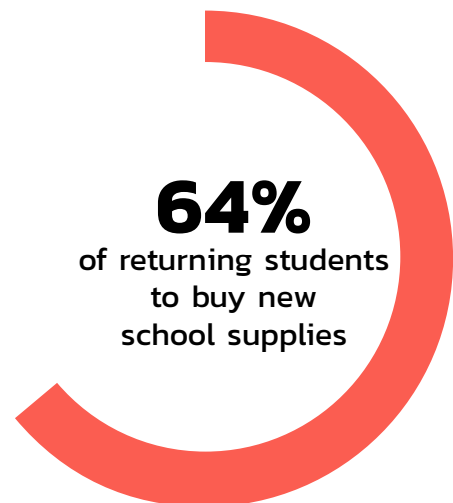
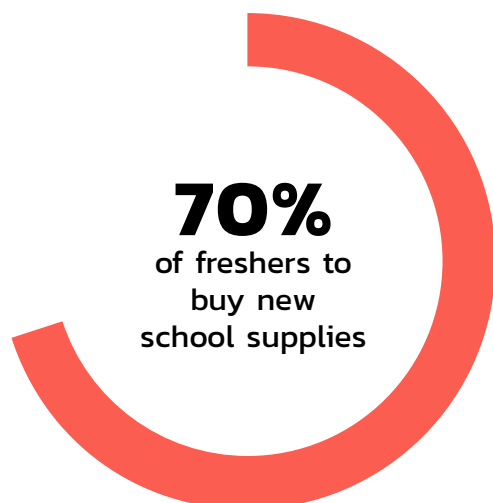
Students in both countries say **price**, **quality** and **discounts** are the most important factors when buying school supplies. And one UK student told us that they "want to see more giveaways to help us buy the supplies we need to be successful for the upcoming school semester."

Convenience is King

These preferences indicate a love of convenience (also reflected in how they buy food and drink). Students are likely to appreciate upsells connected to their overall student-shopping intent, and well-signposted areas (both on and offline) that make finding supplies a cinch.

Speaking of an opportunity to drive sales, freshers and freshmen seem to be a hot market for this category. Because freshers are more inclined to splash out on stationery than their second and third-year counterparts.

In the UK, **70%** of freshers will be buying school supplies, which drops to **64%** for members across all years. In the US, it's **87%** of freshmen vs. **77%** of returning college students.



The projected spend for fashion is £252m for UK students and £348m for US students.

First-years and members will buy new clothes. There's little difference between the two groups: **64%** vs. **65%** for the UK, and **64%** vs. **66%** for the US.

Gen Z students **prioritize price, quality and discounts** when clothes shopping. Discounts and promotions are paramount.

As we detailed in our [Gen Z 2021 fashion report](#):



£252m

UK student
fashion spend

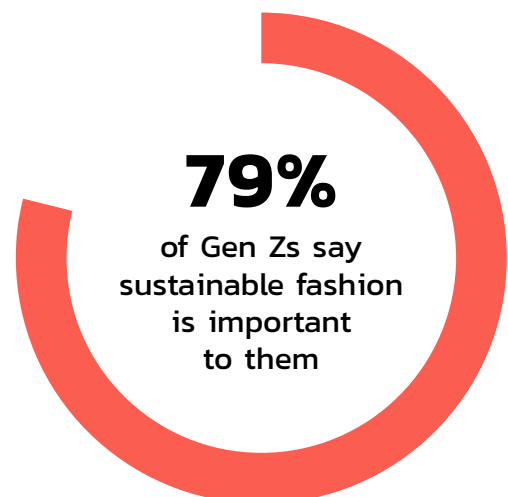
£348m

US student
fashion spend

This suggests that the vast majority of Gen Zs won't pay full price for clothing.



Our fashion 2021 report also highlighted how **79% of Gen Zs say sustainable fashion is important to them**, indicating that students who aren't buying new clothes are opting for more sustainable options. They may be shopping second-hand, swapping clothes, making their own outfits or fixing existing clothes instead.



Fashion: Preferred shopping styles & retailers

23% of UK and 24% of US students want to buy new clothes online. Neve Hill, a bonafide Gen Zer, says she shops online because it "allows for convenient returns, making it a cost-effective way to try new and bold fashion choices without the commitment."

Big fashion brands are popular among Gen Z students. US students favour Target, Nike, Shein, American Eagle and Amazon. Meanwhile, UK students like to shop at ASOS, Primark, Zara, Nike and New Look.

That's not to say that big brands should get complacent. [A Forrester study](#) found that **51%** of Gen Z will ensure that a brand's corporate social responsibility aligns with their own before they make a purchase. This suggests that brands turning a blind eye to important issues may lose Gen Z's custom.

Meanwhile, **11%** of UK and **8%** of US students crave the ease and convenience of clothing subscription services.

In the end, we have around **70%** of students opting for in-person shopping experiences (with almost 1 in 4 preferring online shopping). If bricks-and-mortar stores can boost convenience and offer better discounts, they might further solidify their position as the most popular option for clothes shopping.

**11%**

of UK students
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subscription
services

70%

of students opt
for in-person
shopping
experiences

1 in 4

prefer online
shopping



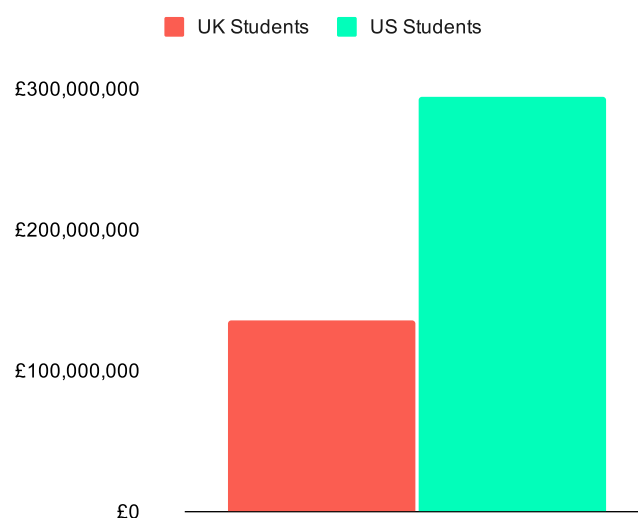
Around a quarter of Gen Z UK and US students will buy from supermarkets or department stores.

This likely means the majority of students are shopping at specific brands, online or offline.

In the UK, they love Boots, Superdrug, Tesco, Beauty Bay, ASDA and Amazon. In the US, they'll shop at Target, Ultra, Walmart, Sephora and Amazon.

What's more, **5%** of UK and **7%** of US students will subscribe to a beauty box in 2022.

Back to Campus Beauty Spend: US vs UK (GDP)





Inclusivity & Sustainability

UK students plan to spend £136m on cosmetics and other beauty products. This stands at £295m for US students.

Some Gen Zs might also only be shopping at beauty brands which largely focus on inclusivity and sustainability, like The Body Shop or a more local, independent brand.

To illustrate, a [Y Pulse survey](#) found that **79%** of Gen Zs agree that brands which create products for skin have a responsibility to represent all colours and tones.¹⁶ Meanwhile, [a study by Pull Agency](#) found that **93%** of Gen Zs look for sustainability credentials in their beauty and personal care purchases.

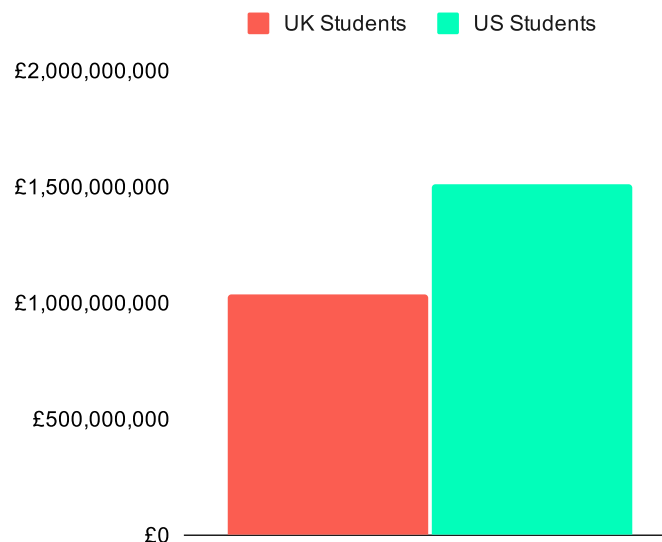
Quality and price are important factors for Gen Zs when shopping for cosmetics and beauty products. So is past experience, which suggests that Gen Z shoppers would respond well to reviews, user-generated content and anything else that reassures them the product or brand is reliable and trustworthy.

38% of UK and 40% of US students will be purchasing computers or hardware in the new academic year.

In the UK, it will be the first time 1 in 4 students have bought a laptop. This stands at **16%** for US students. Meanwhile, nearly half of UK students (**46%**) will be purchasing an upgrade. This comes in at over half for US students (**51%**).

For smartphones, tablets, fitness trackers and similar gadgets, Gen Z students are also spending big. The projected spend for UK students is **£948m** and **£1.30bn** for US students.

Back to Campus Tech Spend: US vs UK (GDP)



Freshers are the hottest market for tech

UK students are projected to spend £1.04bn (\$1.25bn) on computers or hardware. It's £1.51bn (\$1.82bn) for US students.

Tech Gadgets Average Spend: UK Freshmen vs US Members (GDP)



£326 is the average spend for all UK students looking to set themselves up with computers and hardware for the duration of their studies. This increases to £463 for freshers. In the US, the average spend for all students is £353. It's £478 for freshmen.

And first-year students are more likely to buy smartphones, tablets and other electronic gadgets than older Gen Z students. In the UK, it's **39%** of freshers vs. **35%** of members. In the US, it's **46%** vs. **32%**.

Retailers, take note: clever campaigns aimed at freshers and freshmen could serve you well.

Tech—Online vs Offline Shopping

In both the UK and the US, **29%** of students will buy tech big and small from online retailers. This suggests that the majority want an in-store experience when purchasing new technology.

This supports certain findings from three tech studies we conducted across Gen Z students in the UK, US and Australia. For example, we found that, in the UK, there's been a **12%** boost in TVs purchased in-store, while **6%** of students shopped for cameras both online and in-store. Interestingly, the picture changes in the US: there was a **10%** increase in online purchases for laptops and a **9%** increase for tablets.

Based on these findings, students want the best of both worlds—the physical and the digital. Enabling dual experiences may be a winning move for retailers in this category.

What are the most popular electronic gadgets?

UK students are smartphone enthusiasts, with **57%** prepared to purchase a new phone for their uni years. US students like smartphones and tablets in equal measure, with **52%** intent on buying.

Fitness trackers come in as the second most popular electronic gadget in both countries. They're more popular in the US (**28%** of US students vs. **22%** of UK students).

It's also worth noting that across tech, price, discounts and quality are students' most important buying factors.

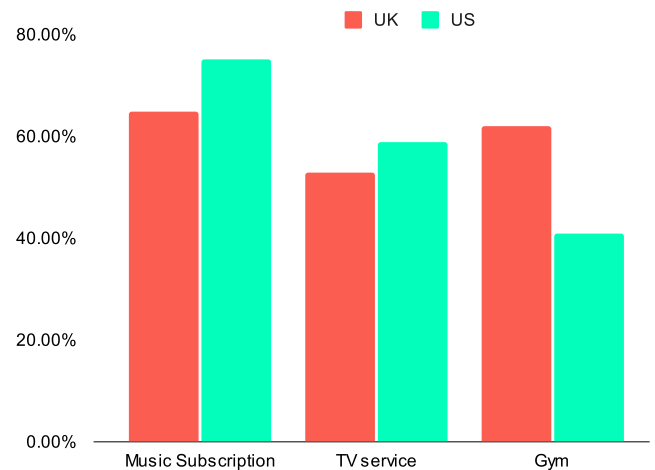


UK students plan to spend £342m on subscriptions, rising to a projected spend of £366m for US students.

- **65%** of UK and **75%** of US students will sign up to a music subscription
- **53%** of UK and **59%** of US students will subscribe to a TV service
- **62%** of UK and **41%** of US students will sign up to a gym

Why are gym subscriptions more popular among UK students? It might be because most US universities have gyms in their dormitory complexes, and these gyms are open to all students for free.

Back to Campus Top Subscriptions: UK vs US



Retailers should weave these insights into messaging to appeal to this audience

US Subscription Purchases



Across all subscriptions, 35% of UK freshers will sign up to a subscription service compared to 37% of members. In the US, it's 33% of US freshmen vs. 41% of members. This is the first category where freshers and freshmen aren't spending as much as their older counterparts.

This could indicate a firmer understanding of costs and budgeting in more experienced students who acknowledge the benefits of 'subscribing to save'. Convenience might also be a bigger priority, making them opt for subscription services in greater numbers than first-year students. Insights retailers should weave into messaging to appeal to this audience.

The projected spend for kitchen and bedroom items is £111m for UK students and £180m for US students.

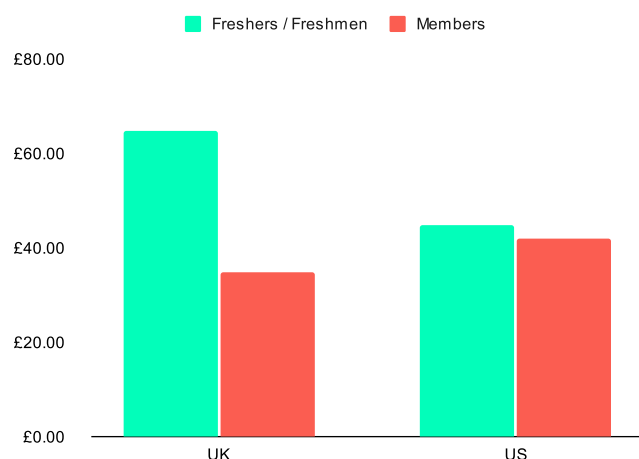
For kitchen and homeware, UK freshers intend to spend **£65** each in the first month before starting uni. This drops to **£35** for UK members.

Meanwhile, US members intend to spend **£42** Freshmen will be spending a little more – **£45**.

In the UK, **35%** of students will buy kitchen and bedroom items. But, more precisely, **52%** of freshers will buy these items as they prepare for the uni years ahead. The difference between years is marginal in the US—**39%** of students will buy kitchen and bedroom items, rising to **40%** for freshmen.

This would suggest that targeting freshers would be a smart move for UK kitchen and home retailers. Meanwhile, US retailers might fare better by targeting students across the board.

Kitchen & Home UK vs US Spend - Freshmen vs Members (GDP)



Do big brands have the upper hand?

27% of UK and **28%** of US students plan to buy their kitchen and bedroom items from supermarkets and department stores. IKEA, Tesco, ASDA, Dunelm and Amazon are the most popular retailers for this category in the UK. In the US, students love Target, Walmart, Bed Bath and Beyond, Amazon and IKEA.

It appears big brands are coming out on top. But these percentages would also suggest that a small portion of students are shopping elsewhere. Perhaps they're looking at buying their kitchen and bedroom items from a second-hand marketplace to save money and help the environment. They could also be buying from smaller brands to shop local.

Such brands might do well if they focus on sourcing and providing high-quality products that are reasonably priced or often discounted. Big retailers also shouldn't ignore that Gen Z students consider quality, price and discounts to be the most important purchasing factors for this category.



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What have we learned about Gen Z spending habits ahead of the new academic year? Several things stand out:

Essential buys reign supreme.

Tech and electronic gadgets also take centre stage with impressive stats for these categories.

Gen Zs dig quality products.

In every single category, students said quality was one of the most important factors when making a purchase. Same goes for price.

They love a discount.

Discounts were cited as the most important purchasing factor in every category except cosmetics and beauty.

Freshers are big spenders.

Their intent to buy is higher than members across many categories. They also plan to spend more overall (**18%** more in the UK, **13%** more in the US).

Big brands are well-loved.

For their convenience and good prices? Probably. But we predict that big brands not taking a stance on important causes will likely struggle with retention over the long term.



One thing is crystal clear...

The Gen Z student market is a goldmine. And now you know what students want: convenient shopping experiences, competitive prices, high-quality items and discounts galore. But remember, your values matter too. Will you stand out for all the right reasons?

Gen Z students will let you know, either way.



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out more about
Gen Z?**

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your brand,
product, and/
or discounts in
front of Gen Z?**

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