



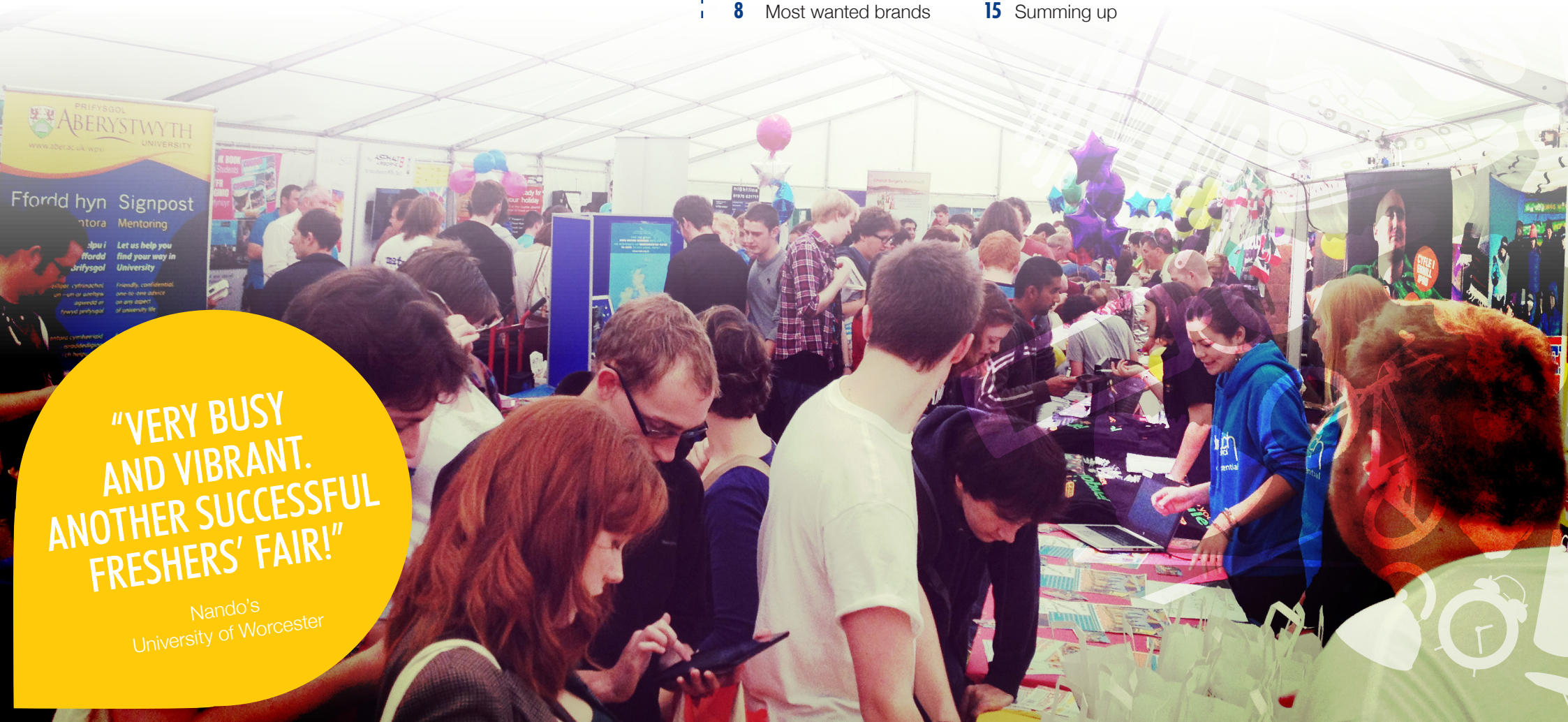
CONNECTING BRANDS WITH STUDENTS

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"VERY BUSY
AND VIBRANT.
ANOTHER SUCCESSFUL
FRESHERS' FAIR!"

Nando's
University of Worcester



HELLO,

Welcome to the BAM National Freshers' Report 2014.

At the kick-off of the 2013/14 academic year, BAM* helped in excess of 600 brands get up-close-and-personal with more than one million eager students at Freshers' Fairs all over the UK.

Our team visited more than 60 fairs across 31 cities within a little over four weeks. As well as soaking up the atmosphere, we conducted one of the largest face-to-face research projects on the student market ever undertaken, surveying more than 6,000 students and 1,100 commercial stallholders.

The results are featured here, in the BAM National Freshers' Report 2014.

And we're delighted to tell you that the student market in the UK is alive and well, packed with 2.5 million experimental, enthusiastic and engaged young people, with an estimated spending power of more than £15.5 billion.

We hope you find the BAM National Freshers' Report 2014 informative and helpful, and we welcome further discussion – simply call us on 0845 1300 667 or email insight@bamuk.com.

Read on, get in touch, and allow us to help you get better acquainted with this vital component of the youth market.

BAM Insight Team

*Wondering who BAM is?

BAM is the UK's most experienced student marketing agency, connecting brands with the student market for more than 15 years. We specialise in providing a complete student marketing service, from

strategy formulation, market research and media planning, through to media buying, campaign delivery and evaluation. We're with our clients every step of the way, to ensure a hassle-free and results-

driven service that drives their business within this market. It's a market we love and understand thoroughly. Drop into BAM HQ and let us tell you more.

WHY FRESHERS?

The experience of going to university is a key life-stage; for most it's a first taste of independence and a place where lifelong friendships begin. It can also be a fruitful time for brands to begin relationships with a savvy consumer that's hungry for new, interesting, relevant and great value products and services.

BAM opens doors for brands to become part of the student experience, and 'Freshers' is where the journey begins.

48% of students plan on using brands they hadn't used before, as a result of seeing them at their Freshers' Fair

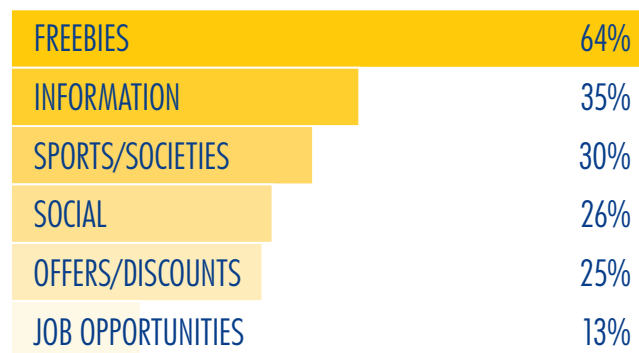
"BUSY,
VERY
BUSY!"

Elle Magazine
University of the Arts



THE RECIPE FOR SUCCESS

The first few weeks at university are a whirlwind of new opportunities, so we asked 6,000 students why they voted with their feet, turning up in their masses to attend their university's Freshers' Fair.



There's still an overwhelming desire for freebies, with this being the main draw for 64%, which is up a further 4% from 2012.

Over a third (35%) are hungry for information, wanting to get the low-down on the latest products and services from brands.

The Freshers' Fair is a key date in the life of each university, so it's no surprise that 26% see this as an opportunity to socialise, first and foremost.

CREATE A STALL THAT ENCOURAGES
SOCIAL INTERACTION AND CAN CATER
FOR GROUPS HANGING OUT TOGETHER

**BAM
TIP**

Students are canny bargain hunters, and 25% of those attending Freshers' were primarily there to pick up offers and discounts.

WHILE OFFERS FORM AN IMPORTANT
PART OF STALL SUCCESS, BRANDS REALLY
NEED TO CONSIDER THE FULL PACKAGE —
FREEBIES, DISCOUNTS, SOMETHING NEW
AND LOTS OF OPPORTUNITIES FOR
INTERACTION TO CONNECT AT
THE HIGHEST LEVEL

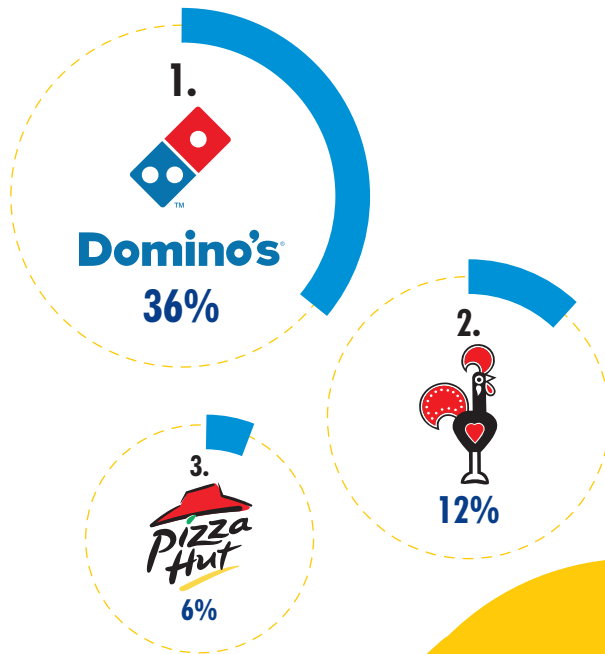
**BAM
TIP**

**"VALUABLE
EXTERNAL
OUTREACH TO A NEW
CUSTOMER BASE"**

DW Sports
Newcastle University

WHICH BRANDS ROCKED THE FAIRS THIS YEAR?

Top three stalls voted for by students



Domino's and Nando's retain and strengthen their position as top dogs of the Freshers' Fairs.

Domino's increased their score by 10% and Nando's by 2% on last year.

"WELL ORGANISED WITH GREAT HELPERS. A LARGE FOOTFALL ALL THE WAY THROUGH."

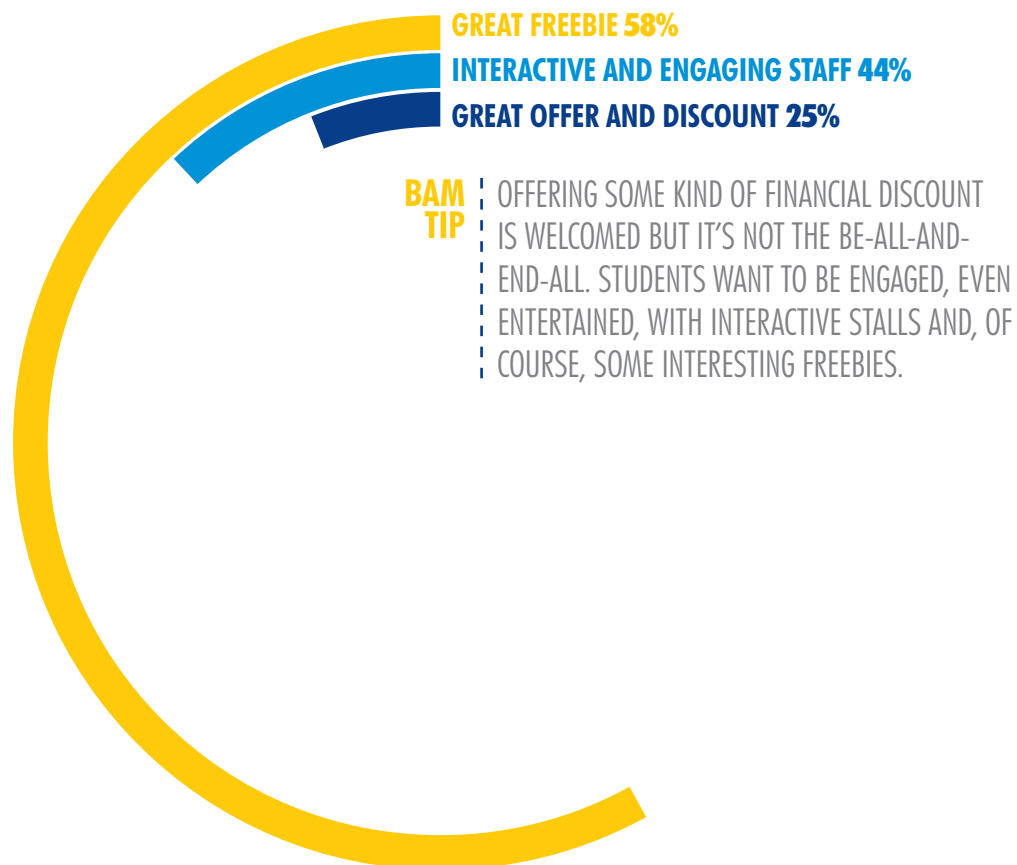
Waitrose
University of Southampton

"HECTIC, YET REWARDING!"

Picturehouse Cinemas
University of Sussex



WHAT REASONS DID STUDENTS GIVE FOR CHOOSING THEIR FAVOURITES?



The students' top three favourite stalls were followed by a cluster of leisure and retail brands which all proved popular, including:

- * **Wilkinsons**
- * **Elle Magazine**
- * **Bierkeller**
- * **Gourmet Burger Kitchen**
- * **Morrisons**
- * **Vodka Revolution**
- * **ZaZa Bazaar**
- * **Rymans**
- * **O2 Academy**

Note: Bierkeller and ZaZa Bazaar are both very local offerings that packed a punch connecting well with their local student market – whatever the size of your brand, success is dependent on understanding how your student market ticks.

"GREAT TO ENGAGE WITH STUDENTS, VERY UPBEAT AND POSITIVE EXPERIENCE OVERALL."

Wilkinsons
University of Lincoln

WHERE ARE THE OPPORTUNITIES FOR BRANDS IN 2014?

We asked students which sectors or brands they'd loved to have seen at the Fairs in 2013, giving us a great heads-up for planning the 2014 Freshers' Fairs.

Calling all fashion brands, your student public awaits! Just 2% of this year's stalls were fashion retailers, and an emphatic 41% of students wished there had been more.

Likewise, food and drink brands were missed at the 2013 fairs – they accounted for just 1% of stallholders, but were high on the list of what the students would love to see.

TOP 10 MOST WANTED



TOP THREE NAMED

41% TOPSHOP, NEW LOOK, H&M

33% COCA COLA, LUCOZADE, SMIRNOFF

30% WETHERSPOONS, YATES, PIER PRESSURE

29% KRISPY KREME, CADBURY, BEN AND JERRY'S

26% TESCO, ASDA, SAINSBURY'S

25% NANDO'S, MCDONALD'S, DOMINO'S

20% OXFAM, UNICEF, CANCER RESEARCH

17% FITNESS FIRST, PURE GYM, BOOTS

16% ODEON, CINEWORLD, STA TRAVEL

16% APPLE, SONY, MICROSOFT

Supermarkets can score here too – comprising just 2% of this year's stallholders, over a quarter of students are interested in getting some face-to-face time with supermarkets at the Fairs.

Food outlets are hugely popular – they took the top spots for best freebies and best overall stalls – but there's still room for more, according to our hungry fair-goers.

Nightlife is a big attraction – well represented at the 2013 Fairs (9%), almost a third (30%) of students would like to see more bars, pubs and clubs come along to the 2014 events.



"REALLY LIVELY
AND GOOD FUN. ENJOYED
THE CHANCE TO SHARE
INFORMATION ABOUT OUR LOCAL
PROPERTIES AND MEMBERSHIP.
THANK YOU."

National Trust
Liverpool John Moores
University



COMING BACK FOR MORE

Brands have a great opportunity to build brand loyalty year-on-year, with 95% of all first- and second-year students that attended the 2013 Freshers' Fairs planning to come back again in 2014.

Which just goes to show, you can't have too much of a good thing.

So, we have great insight into what students love about Freshers' and a wish-list for the brands and sectors that they're ready to have some fun with next year.

But what do we know about the commercial benefits for brands? We asked 1,100 stallholders participating in our Freshers' survey to tell us what they gain from the events.

THE BUSINESS CASE FOR FRESHERS' FAIRS

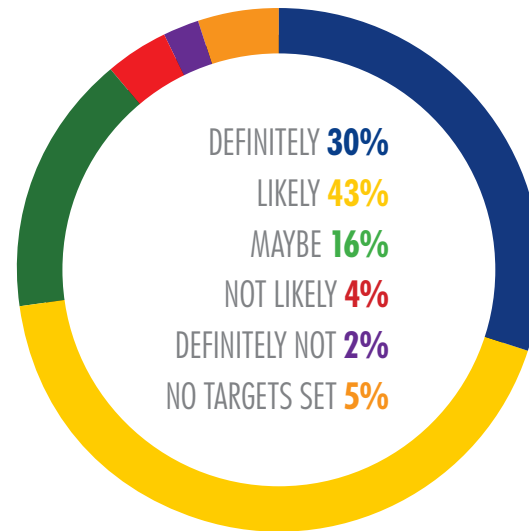
Every business needs its marketing activity to reap rewards and meet objectives. So we asked 1,100 stallholders for their perspectives on the Freshers' Fair experience.

Primary reasons for exhibiting at Freshers' Fairs

BRAND AWARENESS	57%
STUDENT ENGAGEMENT	51%
INFORMING/EDUCATING	27%
DATA COLLECTION	24%
DIRECT SALES	20%
NEW PRODUCT LAUNCH	6%
MARKET RESEARCH	4%

There's synergy here: brand awareness, engagement and information all ranked highly when students identified the reasons for their favourite stalls.

How likely is it that you have achieved the targets you set for the fair?



Having had a successful event, it's perhaps unsurprising that only 1% of brands think they are unlikely to come back in 2014.

Which channels do you find most effective when targeting students?

FACE-TO-FACE EXPERIENTIAL	80%
SOCIAL MEDIA	49%
LEAFLETING/FLYERING	42%
WEB ADVERTISING	27%
POSTER OR DISPLAY ADVERTISING	26%
EMAIL PROMOTIONS	25%
PRINT ADVERTISING	17%
SMS	8%
SPONSORSHIPS	5%

TOP 10 FRESHERS' FAIRS IN 2013/14

We polled students and stallholders attending the 2013/14 Freshers' Fairs, asking them to rate their experience across a range of criteria, from how well it was organised to the quality of the stalls and the goodies on offer. BAM has combined their scores to give a definitive 'best in class' overall ranking.

It was a cracking year with exceptional performances from many universities, creating a national average 'overall satisfaction score' of a hugely respectable 75%. All of our Top 10 universities scored above the national average, creating a first class experience both for their students and the brands hosting stalls.



OVERALL SATISFACTION SCORE

1	LIVERPOOL HOPE UNIVERSITY	82.6%
2	UNIVERSITY OF ROEHAMPTON	82.0%
3	SOUTHAMPTON SOLENT UNIVERSITY	81.6%
4	UNIVERSITY OF GLOUCESTERSHIRE	81.3%
5	UNIVERSITY OF SOUTH WALES	81.1%
6	LIVERPOOL JOHN MOORES UNIVERSITY	80.3%
7	UNIVERSITY OF THE WEST OF ENGLAND (UWE)	80.0%
8	UNIVERSITY OF BATH	79.7%
9	CARDIFF METROPOLITAN UNIVERSITY	78.2%
10	UNIVERSITY OF GREENWICH	77.7%

"THIS
YEAR'S FAIR
HAS BEEN
AMAZING!"

Ryman
University of Leeds

"WELL
ORGANISED AND BUSY
FAIR AS ALWAYS. STAFF
WERE REALLY HELPFUL
AND FRIENDLY!"

Stagecoach
University of St Andrews

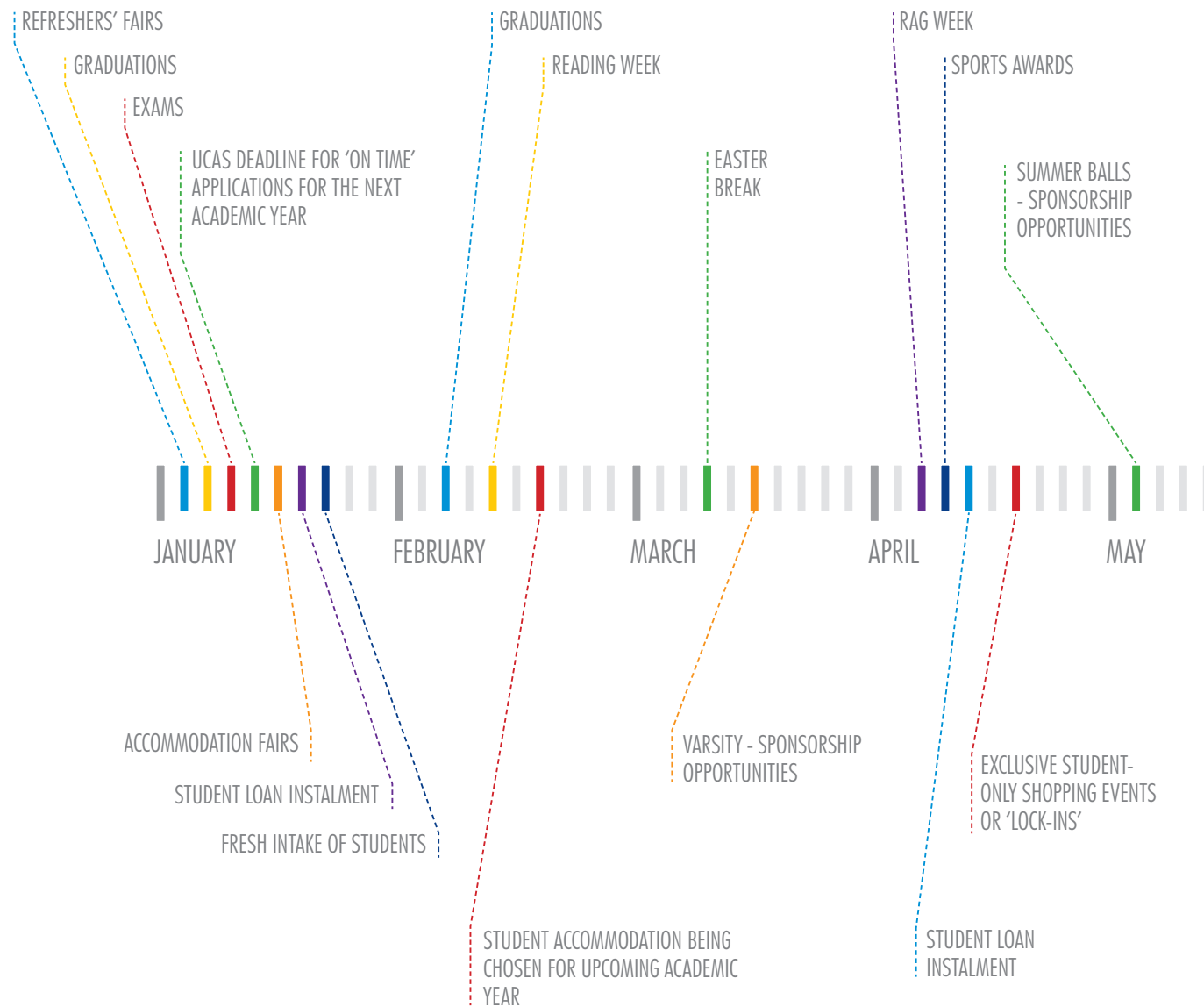
KEEP THE CONVERSATION GOING

Freshers' Fairs present a fantastic opportunity for brands to begin a relationship with students at this exciting time of their university careers.

But having grabbed their attention and interest, 73% of stallholders expect to maintain the momentum with a range of promotional tactics.

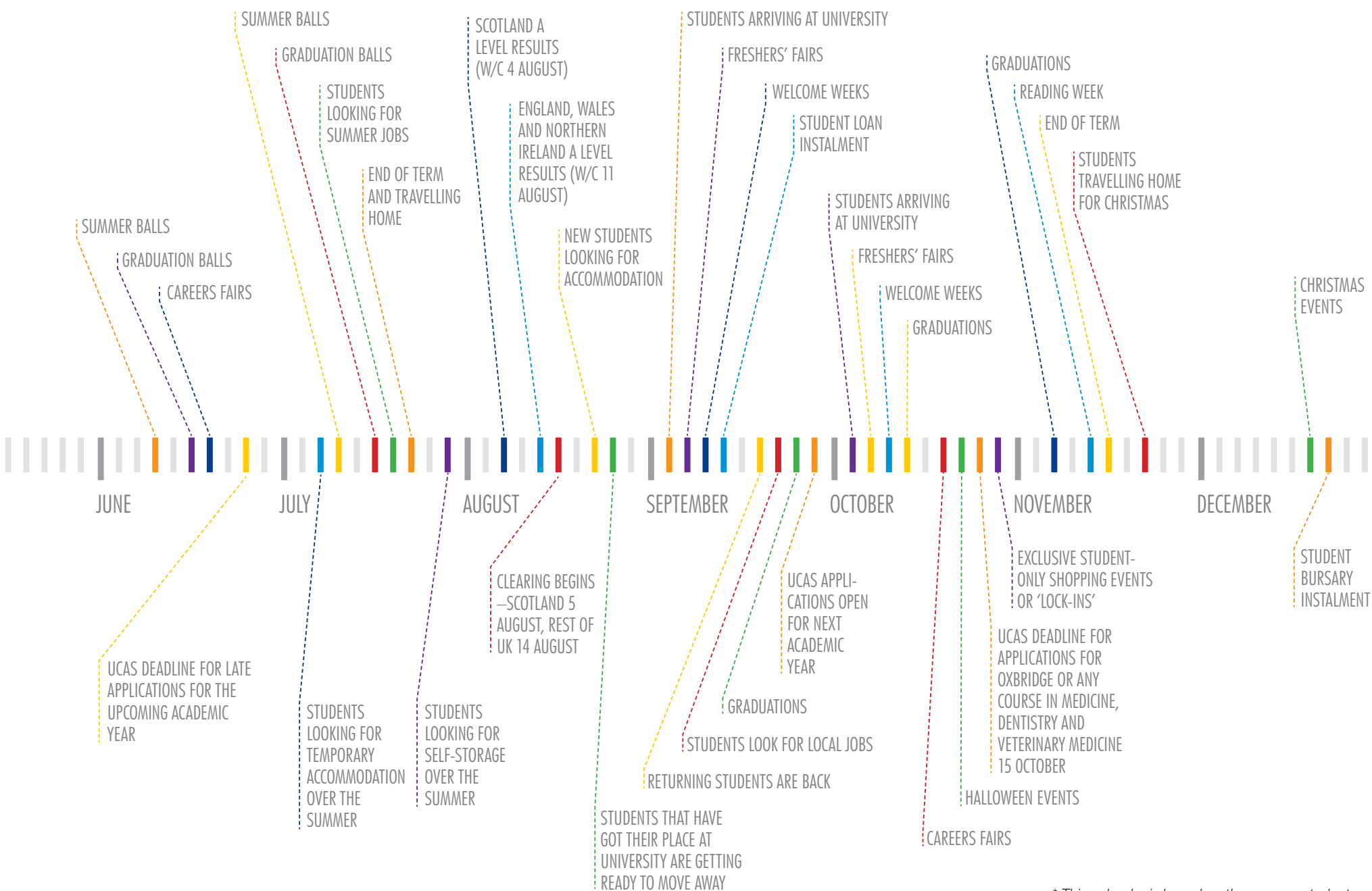
Having seen first-hand the power and value of the student market, most stallholders are keen to get involved further, and BAM helps many brands to develop sustained student marketing campaigns all year-round.

Here's BAM's authoritative guide to the student year's hot topics and opportunities for brand engagement.



**"FANTASTIC
AND
WORTHWHILE,
AS ALWAYS!"**

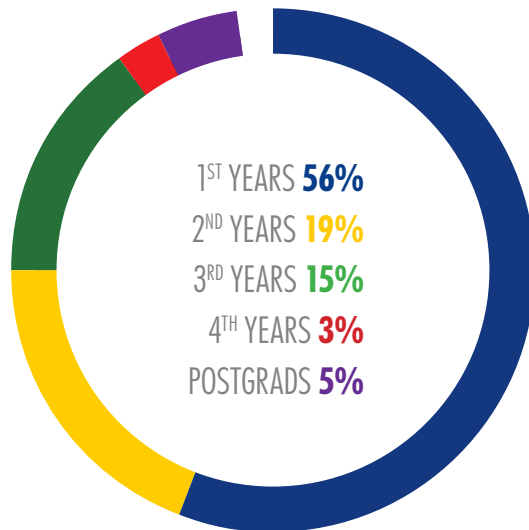
Royal Shakespeare Company
University of Oxford



** This calendar is based on the average student year and is subject to variation between institutions.*

REPEAT AND RE-FRESH

Universities may be laying on a great welcome show for the first-years, but Freshers' Fairs are much loved and well attended by other year groups too.



BAM TIP | THINK ABOUT HOW YOU INTERACT WITH STUDENTS WHO MAY HAVE ALREADY BEEN THERE AND GOT THE T-SHIRT, MUG, OR BEGINNERS' SURVIVAL KIT.

Life as a third-year student often holds a very different outlook to that of the first-year, as our research shows.

First-years placed almost twice the emphasis on 'gaining information about brands' as a motivator for attending the Fairs, compared to third-years. This thirst for information may be a good indicator of just how receptive they can be to brand messaging as they form purchasing habits of their own, asserting their independence away from the family home.

This is further substantiated by the results which show first-years were 10% more likely than third-years to use a brand they hadn't used before as a result of their encounters at Freshers' Fairs. This is perhaps indication of just how open they are to new brands, products and experiences at this exciting time.

In fact, there is evidence to suggest that students become increasingly brand loyal throughout their time at university.

Third-year students placed higher emphasis on 'love of the brand' and lower importance on 'freebies' when choosing their favourite stall, compared to responses from first-years.

AN EYE TO THE FUTURE WORKPLACE

Third-year students placed more importance than first-years on the hope of hearing about job opportunities as a reason for attending Freshers' Fairs.

Not traditionally considered a venue for graduate recruiters, there is a clear demand from third-years wanting graduate recruiters at these events – more than double that of their younger counterparts.

SUMMARY OF KEY FINDINGS

- ✿ Freshers' Fairs remain central to the student experience; 95% of first- and second-years plan to return next year.
- ✿ There's still an overwhelming desire for freebies, with this being the main draw for 64% of students surveyed, which is up a further 4% from 2012.
- ✿ It's important to create an interactive experience with engaging staff in order to achieve the greatest impact with students. 44% of students rated interactive and engaging staff as the reason for selecting their favourite stall. It's not all about the freebies, your stall must tick all the boxes.
- ✿ Domino's and Nando's retain and strengthen their position as top dogs of the Freshers' Fairs.
- ✿ 41% of students want to see fashion brands at the fairs next year, with Topshop, H&M and New Look the most in demand.
- ✿ Students become increasingly brand-loyal throughout their time at university. Third-year students placed higher emphasis on 'love of the brand' and lower importance on 'freebies' when choosing their favourite stall, compared to responses from first-years.
- ✿ Only 1% of brands said they would be unlikely to return to the fair next year, testimony to the power and effectiveness of experiential marketing at Freshers' Fairs.

1	DOMINO'S	36%
2	NANDO'S	12%

Leisure and retail brands were hot on the heels of the dining favourites this year, and in high demand for 2014 fairs.

YOUR NEXT STEPS IN THE STUDENT MARKET

As the UK's most experienced student marketing agency, BAM helps brands get closer to this enthusiastic and rewarding market.

Students represent a true cross section of the UK demographic, united by the unique experience of attending university. As such, we'd be so bold as to say that no youth marketing strategy is complete without exploration of opportunities within the student market.

BAM guides hundreds of brands through the student market each year, adding our knowledge, insight and experience to plan and execute the perfect campaign.

Freshers' Fairs are fun. And the opportunities are serious.

Simply tell us what you want to achieve from the student market and we'll show you a solution that supports your brand, and your bottom line.

Get in touch on 0845 1300 667 or insight@bamuk.com and let's talk about your next successful campaign, today.

"FANTASTIC DAY! FAB WAY TO LET STUDENTS KNOW WE ARE HERE."

Specsavers
University of Bath



YOUR GATEWAY TO THE STUDENT MARKET.

EMAIL: insight@bamuk.com

 virtualbam

 BAM student marketing

