

Pearson Student Mobile Device Survey 2013

National Report: College Students

Conducted by Harris Interactive
Field dates: January 28 – February 24, 2013

Report date:
April 17, 2013

Table of Contents

▪ Background & Objectives	3
▪ Research Methodology	4
▪ Executive Summary	7
▪ Detailed Findings	
▪ Student Attitudes Towards Tablets and Other Mobile Devices	9
▪ Mobile Device Usage, Ownership, and Purchase Intent	13
▪ Mobile Device Usage for School Work	18
▪ Appendix	
▪ Demographic Profile	23

Background & Objectives

Pearson seeks to better understand how students use mobile technology for learning. As more and more students have access to tablets, smartphones, and other mobile devices, Pearson wants to know how students use the mobile devices they currently have for learning.

The survey examines:

- Current usage, ownership and purchase intent of mobile devices by college students;
- How college students currently use mobile devices for school work; and
- Students' attitudes towards tablets for learning; and

Research Methodology

This survey was conducted online within the United States by Harris Interactive on behalf of Pearson between January 28 and February 24, 2013.

The survey was conducted among 1206 college students. Qualified college students were U.S. residents between the ages of 18-30 who were enrolled in either a 2-year college, 4-year college or university, or graduate school

Data were weighted to be representative of the college student population in the U.S. Figures for age, sex, race/ethnicity, region, and household income were weighted where necessary to bring them into line with their actual proportions in the population. This survey was part of a larger study on students in the U.S. that also included 4th through 12th graders, including oversamples in Florida, Texas, California, and New York.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with non-response, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Interactive avoids the words "margin of error" as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Research Methodology (continued)

Notes on reading this report

- Throughout this report, we mention various mobile devices. Below are the definitions that were provided in the survey:
 - Netbook: A very small (10-inch screen or less) laptop computer designed for access to the Internet and basic computing tasks.
 - Smartphone: A cell phone with Internet access, such as the Apple iPhone, Android phone, or Windows phone.
 - Basic e-book reader: An e-book reader with limited Internet access that is used mostly for reading, such as the black-and-white Amazon Kindle, black-and-white Barnes & Noble Nook, Barnes & Noble Nook Color, or Nook HD.
 - Small tablet: A tablet that is around 7 inches, such as the Apple iPad Mini, Amazon Kindle Fire, Nook Tablet, or Google Nexus 7.
 - Full-size tablet: A tablet that is around 10 inches, such as the Apple iPad or Google Nexus 10.
- Tablet owners are defined as those who own either a full-size tablet or a small tablet.
- Significant differences between subgroups at the 95% confidence level are indicated with a letter (A, B, or C), arrows, or a call-out on the slide.
- A dash represents a value of zero. An asterisk represents a value greater than zero but less than one.

Research Methodology (continued)

Notes on reading this report

- At certain questions, trended data from the 2012 and 2011 Students and Tablets Surveys are included where relevant.
 - The 2011 survey was conducted online from March 8-31, 2011 among 1,214 college students.
 - The 2012 survey was conducted online from January 9-27, 2012 among 1,206 college students.
- Please note that the question text and answer responses have changed slightly in the 2013 survey compared to previous years. Please use caution when comparing trended data for the following questions:
 - Device ownership question
 - 2013: Which of the following devices do you personally own?
 - 2012 and 2011: Which of the following devices do you currently own?
 - Device purchase intent question
 - 2013: In the next 6 months, which of the following devices do you plan to purchase or own?
 - 2012 and 2011: In the next 6 months, which of the following devices do you intend to purchase?
 - The following answer responses have changed across the survey years to accommodate the expanding tablet market:
 - In the 2012 survey, “standard tablet computers” was used for tablets that include the Apple iPad and Samsung Galaxy Tab and “e-book reader/small tablet device” was used for tablets such as the Amazon Kindle Fire and Barnes & Noble Nook Tablet. In the 2013 survey, the terminology that we use for these devices are “full-size tablets” and “small tablets”, respectively
 - In the 2011 survey, there was no distinction between standard (or full-size) tablets and e-book reader/small tablet devices (or small tablets). Only “tablet computer” was asked in 2011.

Executive Summary

- College students strongly believe that tablets can improve their learning.
 - Eight in ten believe that tablets can transform the way students learn and make learning more fun.
 - Over six in ten believe that tablets can help students study more efficiently and perform better in classes.
 - Two in three believe that tablets will effectively replace textbooks as we know them today within the next five years.
- A substantial portion of college students own a tablet, but the rate of adoption is slowing.
 - Nearly four in ten college students own either a full-size tablet, a small tablet, or both.
 - This is a small gain compared to the three in ten who owned a tablet in 2012.
 - The same as in 2012, one-third of students say they plan to purchase a tablet in the next six months.
- A solid majority of college students own a smartphone.
 - Three-quarters own a smartphone, which is an increase from the previous two years; one-half intend to purchase one in the next six months.

Executive Summary (continued)

- About one in four college students use tablets regularly for school work.
 - Around four in ten students have used a tablet for school work during the current academic year.
 - Among those who have used a tablet for school work, two-thirds use the device at least a few times a week.

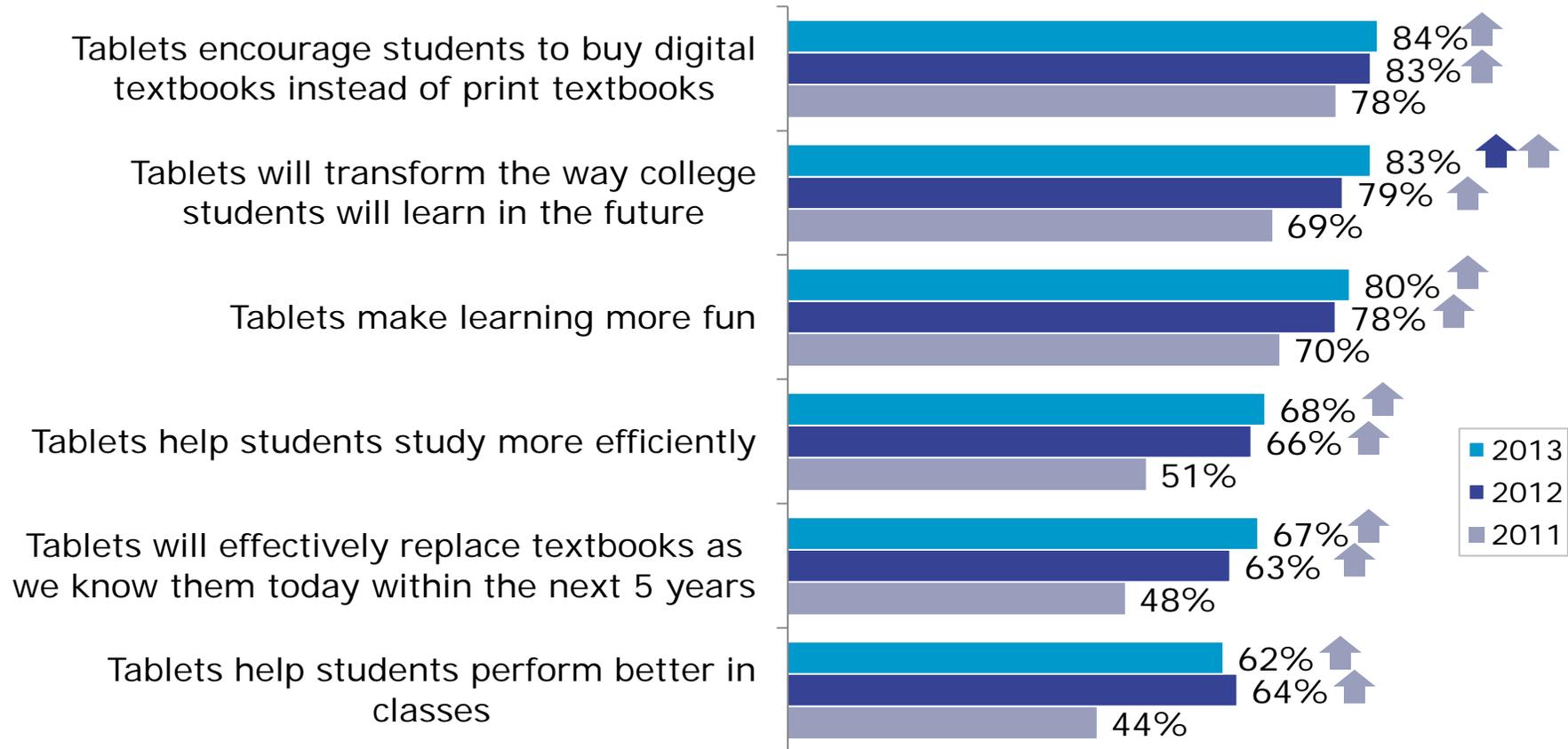
STUDENT ATTITUDES TOWARDS TABLETS AND OTHER MOBILE DEVICES

Summary of Student Attitudes Towards Tablets and Other Mobile Devices

- The majority of college students strongly believe that tablets can enhance learning.
 - Over eight in ten college students believe tablets will transform the way students learn (83%), which is an increase from a year ago (79%).
 - Eight in ten (80%) believe that tablets make learning more fun.
 - Two-thirds believe that tablets help students study more efficiently (68%) and will effectively replace textbooks as we know them within the next five years (67%).
 - Six in ten (62%) believe that tablets help students perform better in classes.
- Four in ten college students (43%) would like to use mobile devices more often in their courses.
 - Another four in ten (44%) say they are using mobile devices at the right amount in their courses.

College students' expectations for tablets remain very high. Students are even more likely to believe that tablets will transform the way college students will learn in the future than they did a year ago.

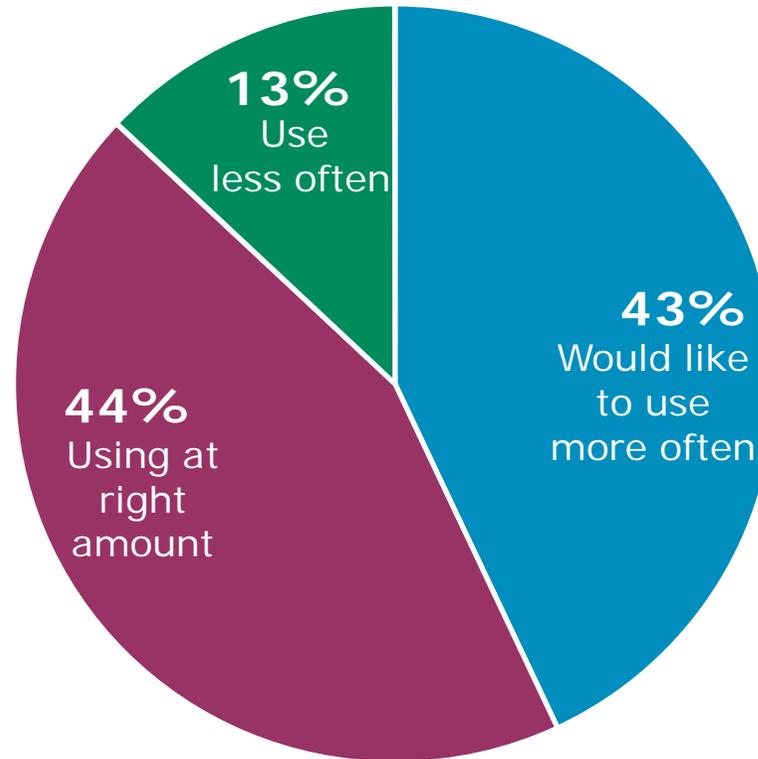
College Students' Attitudes Towards Tablets (% Strongly/Somewhat Agree)



Arrows indicate significant differences at the 95% confidence level.
 Base: College Students (2013: n=1206, 2012: n=1206, 2011: n=1214);
 Q945. How much do you agree or disagree with the following statements?

Most college students would like to use mobile devices the same amount, or less often in class.

Attitudes Towards Mobile Device Usage in Class



Subgroup Findings

Women are more likely than men to say they are using mobile devices at the right amount in class (47% vs. 40%).

One-half of tablet owners (49%) say they would like to use mobile devices more often compared to 40% of non-owners.

Early adopters (57%) and those who take all (54%) or some (49%) of their courses online are more likely than their counterparts to want to use mobile devices more often in class.

Letters indicate significant differences at the 95% confidence level.

Base: College Students: n=1206

Q935. Which of the following best describes how you would like to use mobile devices in class?

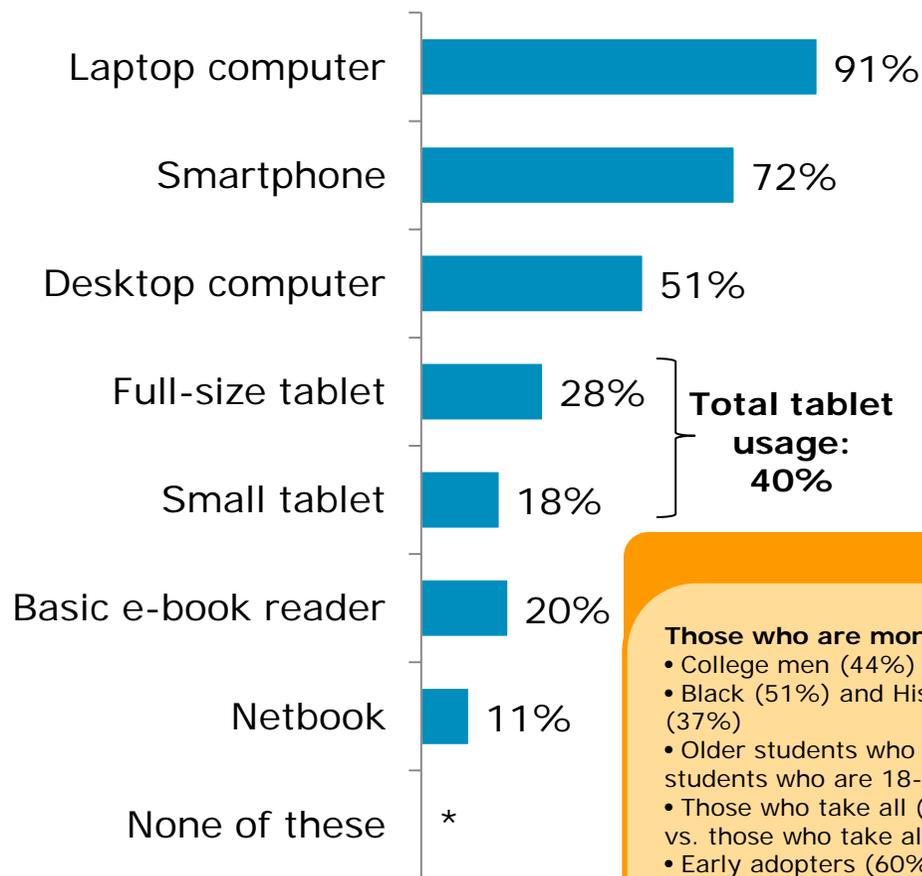
MOBILE DEVICE USAGE, OWNERSHIP, AND PURCHASE INTENT

Summary of Mobile Device Usage, Ownership, and Purchase Intent

- Among college students, tablet ownership, including both full-size and small tablets, has increased only modestly from 2012. Nearly four in ten students (38%) now own a tablet compared to one-third (33%) a year ago.
 - Similar to last year, one-quarter own a full-size tablet (26% vs. 25% in 2012) and one in six own a small tablet (18% vs. 17% in 2012).
 - In 2012, one in ten tablet owners (9%) owned *both* a full-size and a small tablet. In 2013, this number has decreased to 6%. Instead, slightly more people now own *only* a full-size tablet (20% vs. 16% in 2012) or *only* a small tablet (11% vs. 8% in 2012).
- One-third of college students (33%) intend to purchase a tablet within the next 6 months, on par with a year ago (36%). Two in ten (22%) want to purchase a full-size tablet and one in six (16%) want to buy a small tablet.
 - Current tablet owners also are looking to purchase a new tablet soon, with four in ten owners (43%) saying they are planning to purchase a tablet within the next 6 months.
- Ownership of smartphones is prevalent among college students, with seven in ten (72%) owning a smartphone. As with tablets, one-third of college students (35%) plan to purchase a smartphone in the next 6 months.

Four in ten college students regularly use either a small tablet or full-size tablet. Three-quarters of college students regularly use a smartphone.

Device Usage



Subgroup Findings

Those who are more likely to use tablets are:

- College men (44%) vs. women (37%)
- Black (51%) and Hispanic (51%) students vs. White students (37%)
- Older students who are 25-30 years old (57%) vs. younger students who are 18-24 (36%)
- Those who take all (46%) or some (54%) of their classes online vs. those who take all of them in-person (31%)
- Early adopters (60%) vs. middle (32%) or late (17%) adopters

Those who are more likely to use smartphones are:

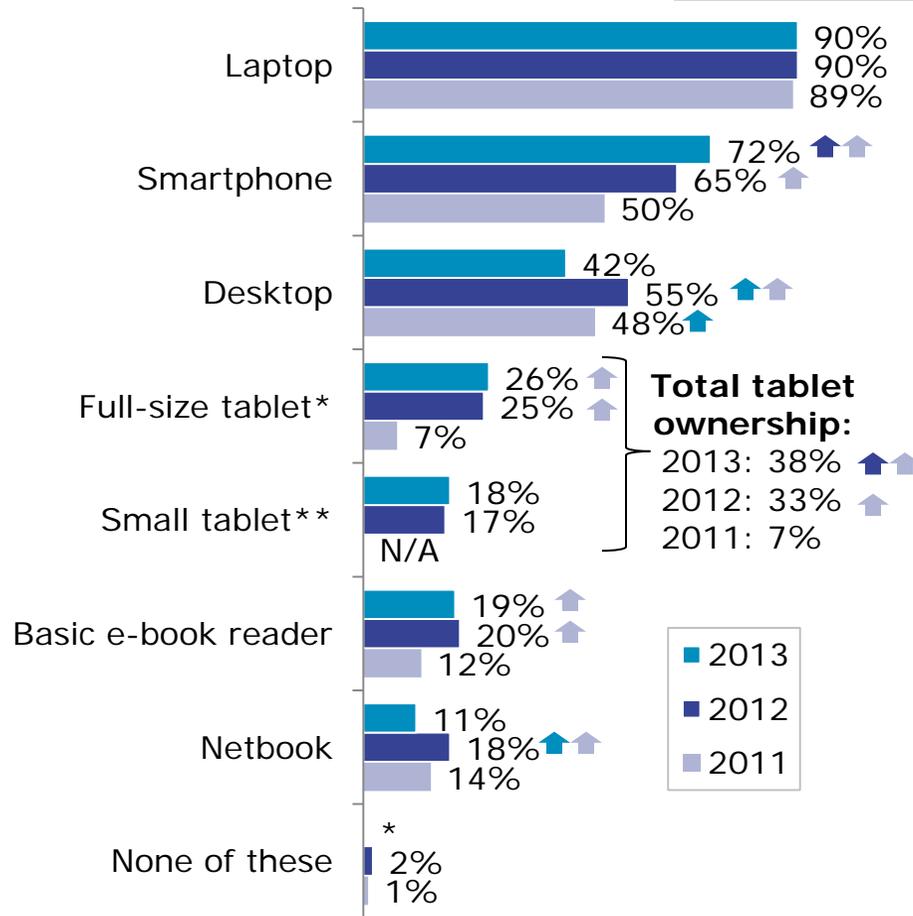
- Black (79%) and Hispanic (80%) vs. White (69%)
- Early adopters (84%) vs. middle (68%) vs. late (49%) adopters

Base: College Students: n=1206

Q708. Which of the following devices do you regularly use, either at home, at school, or somewhere else?

The proportion of students who own a full-size and small tablet have not changed since 2012, however, overall tablet ownership has increased from the previous year, with nearly four in ten owning a full-size or small tablet. Smartphone ownership has also grown in the past two years.

Device Ownership



Type of Tablet Owned Among Total College Students

	2012 (A)	2013 (B)
Owns only a full-size tablet	16%	20% A
Owns only a small tablet	8%	11% A
Owns both types of tablets	9% B	6%

Subgroup Findings

Those who are more likely to be a tablet owner are:

- Men (42%) vs. women (34%), particularly a full-size tablet (30% vs. 24%)
- Hispanic (47%) and Black (47%) students vs. White students (35%)
- Older students who are 25-30 year olds (54%) vs. younger students who are 18-24 year olds (34%)
- Students who take all (41%) or some of their courses online (51%) vs. students who take all their classes in-person (30%)
- Early adopters (57%) vs. middle (29%) or late adopters (16%)

Those who are more likely to be a smartphone owner are:

- Black (81%) vs. White (70%). Hispanic is 77%
- 25-30 year olds (79%) vs. 18-24 year olds (70%)
- Early adopters (85%) vs. middle (68%) vs. late (48%) adopters

*Note: "Full-size tablet" was asked as a "Standard tablet" in 2012 and as a "Tablet" in 2011;
 ** "Small tablet" was asked as a "Small tablet/e-reader device" in 2012. it was not asked in 2011.

Arrows and letters indicate significant differences at the 95% confidence level.

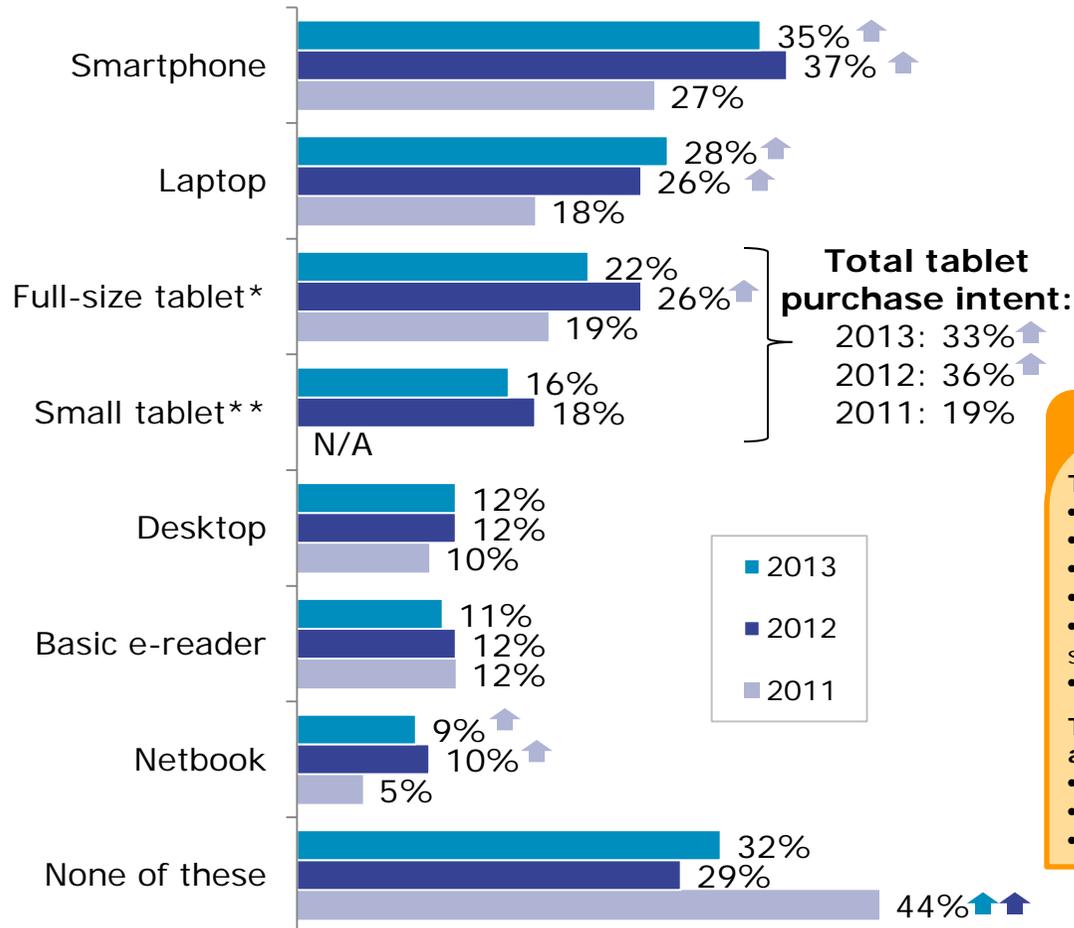
Base: College Students (2013: n=1206, 2012: n=1206, 2011: n=1214)

2013: Q710. Which of the following devices do you personally own?

2012 and 2011: Q710. Which of the following devices do you currently own?

Purchase intent is on par with last year for tablets and smartphones. One-third of college students plan to purchase these devices in the next 6 months.

6 Month Purchase Intent



Four in ten college students who own tablets intend to purchase another one in the next 6 months (43%), including 28% who intend to purchase a full-size tablet and 24% who intend to purchase a small tablet.

Subgroup Findings

Those who are more likely to be tablet purchase intenders are:

- Men (41%) vs. women (27%)
- Black students (45%) vs. White students (31%). Hispanic is 38%
- 25-30 year olds (43%) vs. 18-24 year olds (31%)
- Early adopters (49%) vs. middle (27%) or late adopters (16%)
- Students who take all (42%) or some of their courses online (45%) vs. students who take all their classes in-person (26%)
- Current tablet owners (43%) vs. non-owners (28%)

Those who are more likely to be smartphone purchase intenders are:

- Black (46%) or Hispanic (46%) vs. White (31%)
- 25-30 year olds (42%) vs. 18-24 year olds (33%)
- Early adopters (46%) vs. middle (30%) vs. late (21%) adopters

*Note: "Full-size tablet" was asked as a "Standard tablet" in 2012 and as a "Tablet" in 2011;

** "Small tablet" was asked as a "Small tablet/e-reader device" in 2012. It was not asked in 2011.

Arrows indicate significant differences at the 95% confidence level.

Base: College Students (2013: n=1206, 2012: n=1206, 2011: n=1214)

2013: Q715. In the next 6 months, which of the following devices do you plan to purchase or own?

2012 and 2011: Q715. In the next 6 months, which of the following devices do you intend to purchase?

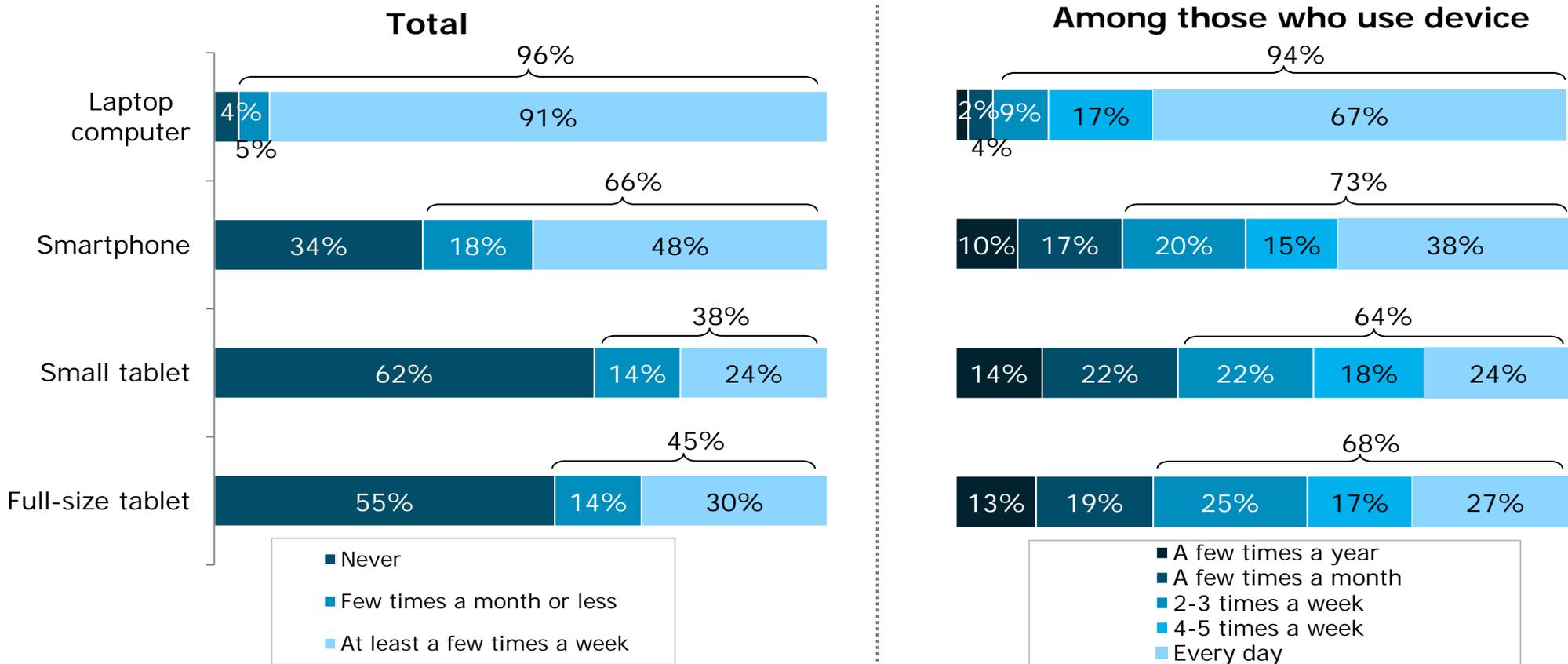
MOBILE DEVICE USAGE FOR SCHOOL WORK

Summary of Mobile Device Usage for School Work

- Around four in ten college students have used tablets for school work this school year, with slightly more students using full-size tablets (45%) than small tablets (38%).
 - Among the students who use these devices, two-thirds use a small tablet (64%) or a full-size tablet (68%) at least several times a week for school work.
 - Of those students who use tablets for school work, three-quarters (74%) personally own the tablet that they use. One in ten (8%) say that they use a tablet that is provided to them by their school.
- Two-thirds of students (66%) have used a smartphone for school work during the current school year. Of those students, three-quarters (73%) have used their phone for school work at least several times a week.

Around four in ten college students overall have used a full-size or small tablet to do school work this school year, including around one quarter who use a tablet at least a few times a week for school work. Among those who use the device, two-thirds use it at least several times a week for school work.

Mobile Device Usage for School Work



Letters indicate significant differences at the 95% confidence level.

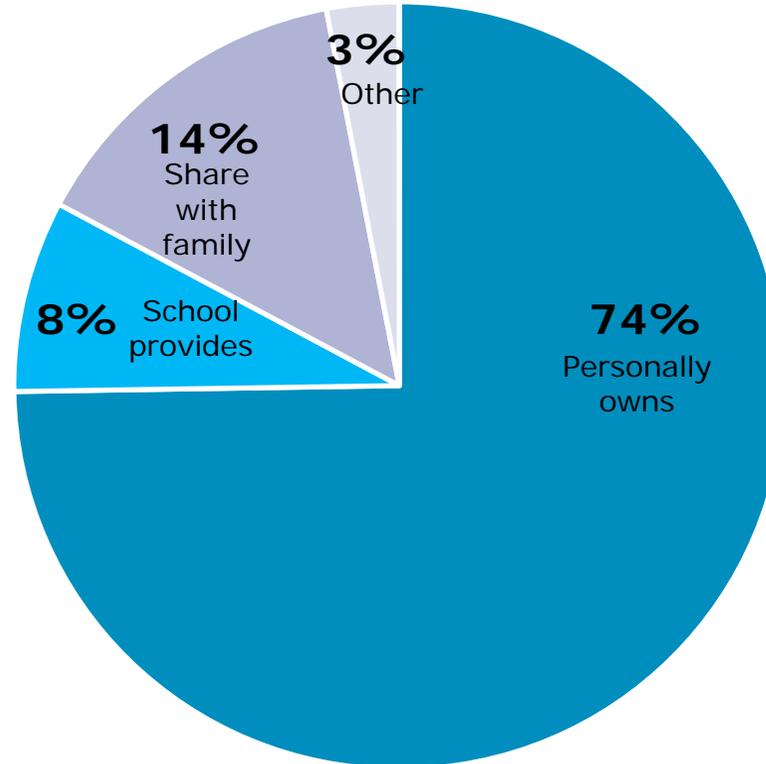
Base: Total College Students n=1206; Among those who use device (floating – n=421-1152)

Q805. During this school year, how often do you use any of the following devices to do school work? (Never, a few times a year, a few times a month, 2-3 times a week, 4-5 times a week, every day)

Among those who use a tablet for school work, three-quarters personally own the tablet and one in seven shares it with a family member.

Ownership of Tablet Used for School Work

(Among those who use a tablet for school work)



Base: Uses a full size or small tablet for school work: College Students n=572

Q810. Is the full-size or small tablet that you use most often for school work one that you personally own or one that your school provides to you?

APPENDIX

Demographic Profile

	Total College Students	Tablet Owner (A)	Not a Tablet Owner (B)
<i>Base:</i>	1206	391	815
Gender			
Male	46%	50% B	43%
Female	54%	50%	57% A
Age			
18-19 years old	28%	21%	32% A
20-24 years old	52%	50%	53%
25-30 years old	20%	24% B	12%
<i>Average (in years)</i>	21.8	22.6 B	21.4
Race/Ethnicity			
White	66%	59%	70% A
Black/African American	12%	15% B	10%
Hispanic	11%	14%	9%
Other	10%	12%	11%
Household Income			
Less than \$35,000	33%	27%	37%
\$35,000 to \$49,999	11%	11%	10%
\$50,000 to \$74,999	17%	20%	15%
\$75,000 to \$124,999	18%	22%	15%
\$125,000 or greater	9%	12%	7%

Letters indicate significant differences at the 95% confidence level.

Demographic Profile (continued)

	Total College Students	Tablet Owner (A)	Not a Tablet Owner (B)
<i>Base:</i>	1206	391	815
School Type			
2-year college	25%	24%	26%
4-year college or university	61%	59%	62%
Graduate or professional school	14%	17% B	12%
Student Status			
Full-time	79%	80%	78%
Part-time	21%	20%	22%
Type of Classes			
All online	9%	10%	8%
Some online/Some in-person	33%	44% B	26%
All in-person	58%	46%	66% A
Technology Adoption			
Early adopter	36%	54% B	24%
Majority adopter	52%	40%	59% A
Late adopter	12%	5%	16% A

Letters indicate significant differences at the 95% confidence level.

**ALWAYS
LEARNING**