

Trends & TudesSM

2 Volume
10 Issue

October

2003

Keeping you informed of current topics in youth and education research.

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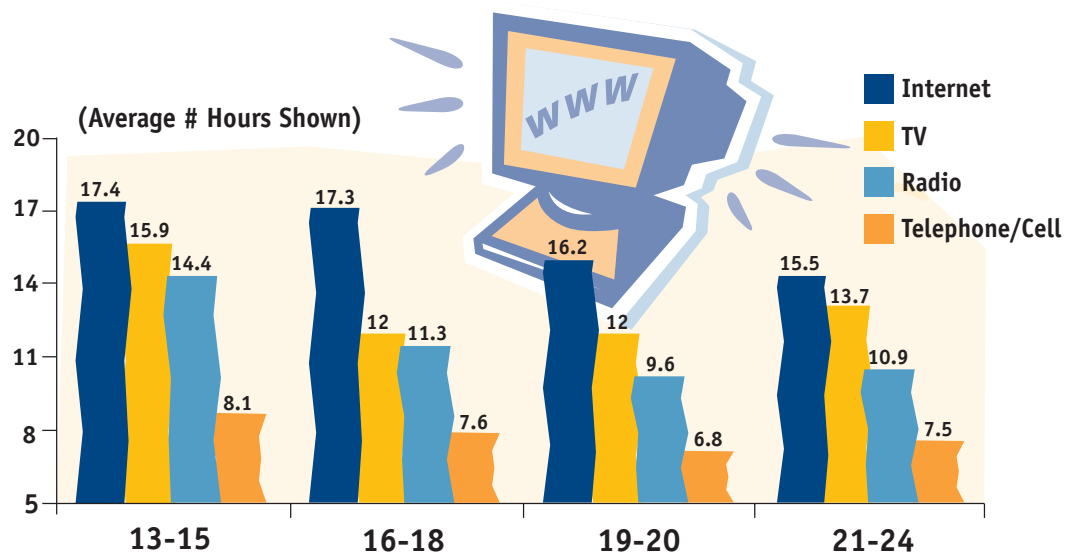
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A Brave New Media World

Harris Interactive recently completed an extensive quantitative research project for Yahoo!® and Carat Interactive. The goal of this project was to understand both how and why the Millennial Generation makes the media choices they make. We are at a unique point in history. The current youth generation faces a media landscape that has changed dramatically in their lifetime. The media environment is saturated and fragmented, and the advent of the Internet has provided media options not previously available. How has this influenced the media lives of the young?

As the chart below indicates, this study is the first to document that the amount of time young people are spending with the Internet now exceeds the amount of time they spend watching television for all subsegments of the youth demographic. The Internet has just recently become the medium of choice for young people. It is their preferred medium for most activities.

TABLE 1
In a typical week, how much time do you spend with media?



Source: Yahoo! and Carat Interactive Born-to-Be-Wired Survey; 2,618 respondents interviewed online in June 2003 by Harris Interactive.

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YOUTH AND EDUCATION
The Harris Poll® PEOPLE

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Editorial: Our Take On It

by **Nan Burgess-Whitman**
Harris Interactive's Qualitative Research Practice

Recently, I ran into a fellow moderator at a conference who was designing her first qualitative research project with children. Her study centered on the design of a package for a new board game, and she needed to gather input from 8-year-old boys. Aside from bringing in the package and asking the boys to talk about what they liked and didn't like, she wondered what else she could do to keep them interested. She is a highly experienced moderator – and has worked with groups of physicians, lawyers, teachers, and has conducted interviews with CEOs and top-level executives. Yet, she told me that the prospect of having to lead groups with kids had her feeling more intimidated and nervous than any other work she had done!

It occurred to me that many of our clients probably do wonder what is the best qualitative approach when working with kids. At Harris Interactive, we feel that qualitative success with kids is all about context. We need to create a context that will facilitate success for the project and for the researchers, and which will result in a rewarding experience for the kids.

We can avail ourselves of many different methodologies. Traditional in-person groups remain the most popular option for our clients, but sometimes project objectives point to a variant in these groups. Sensitive subjects can be most successfully addressed with smaller

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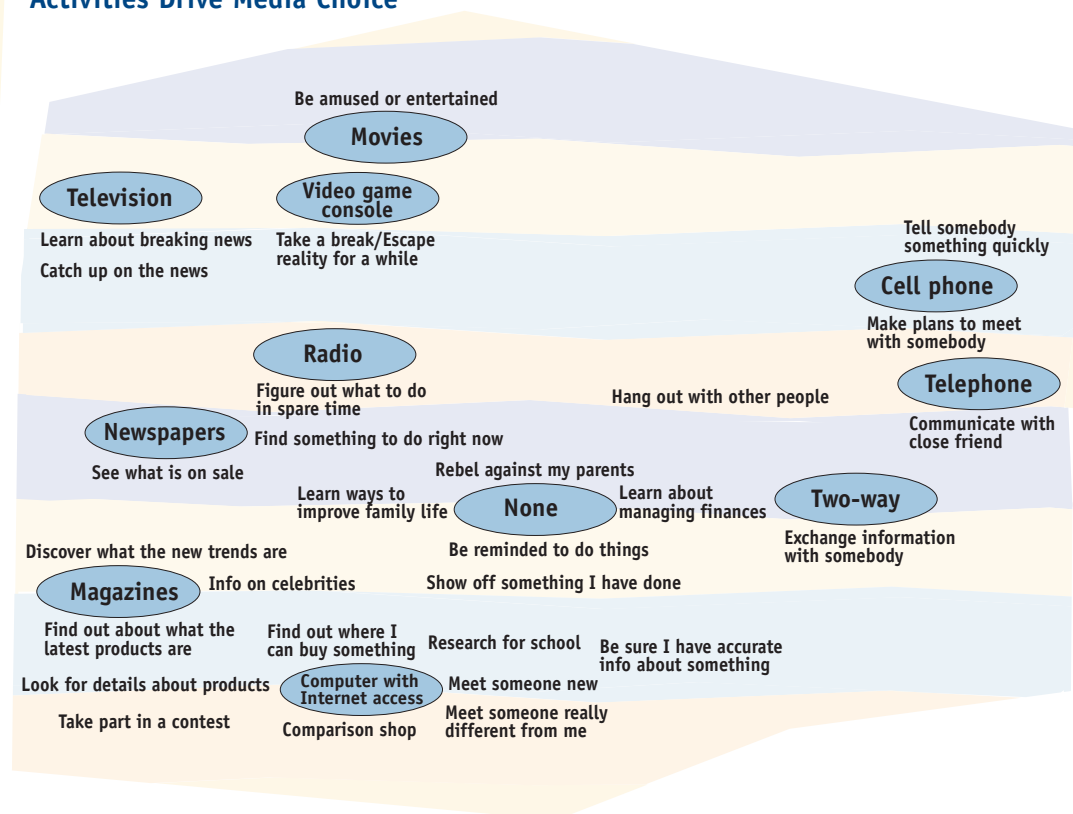
Millennials thrive in this complicated media setting. Whereas adults may find the seemingly endless choices to be confusing, young people gain a sense of empowerment from this choice. They've grown up in a media-rich age.

This study also provides a strong indication that young people are saturated in terms of the amount of media they consume. They have a certain amount of time to spend with media, and the introduction of the Internet has not substantially increased the total amount of time they spend consuming media. The conclusion we make is that the growth of the Internet has come at the expense of other media: as young people use the Internet more, they are using other media less.

Why do young people make the media choices they do? Within a saturated environment, efficiency wins out. Young people begin with an activity or need for media. Then they choose a media category based on what can most effectively deliver what they need. More and more, they are choosing online media.

Table 2 below shows the results of a correspondence analysis. Media that cluster around an activity tend to be preferred for that activity (for the 13 to 24 age group).

TABLE 2
Activities Drive Media Choice



Source: Yahoo! and Carat Interactive Born-to-Be-Wired Survey; 2,618 respondents interviewed online in June 2003 by Harris Interactive.

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groups of children, or with friendship pairs. Many times, when we are seeking to understand a household dynamic between a child and a parent, we will interview parent/child pairs.

Harris Interactive is a leader in online qualitative approaches, which are particularly effective at allowing teenagers from a wide geographic area to interact on a subject. In traditional groups, it is a standard to not mix genders or not to include members from different age groups. We have found that those rules of thumb can be relaxed online, and that we can represent a greater variety of opinion online than with traditional groups. For some projects, this opens up a whole new world of qualitative possibilities.

Focus group facilities have been designed to provide a familiar context to adults. The typical conference table setup is comfortable for adults who are accustomed to meetings. For children, it is critically important to have an environment that is kid-friendly. Let's set an appropriate context for kids:

- A living room setting, not a conference table! There could be beanbag chairs, end tables with plants, clocks and books. Plenty of crayons, nonpermanent markers scrap paper, tape and a flip-chart easel will make this a positive experience.
- No M&Ms. Pretzels, fruit or trail mix, or other low-sugar snacks and beverages should be available. Drinks for the kids should be limited to noncaffeinated beverages such as lemonade or spring water. There is nothing like a roomful of

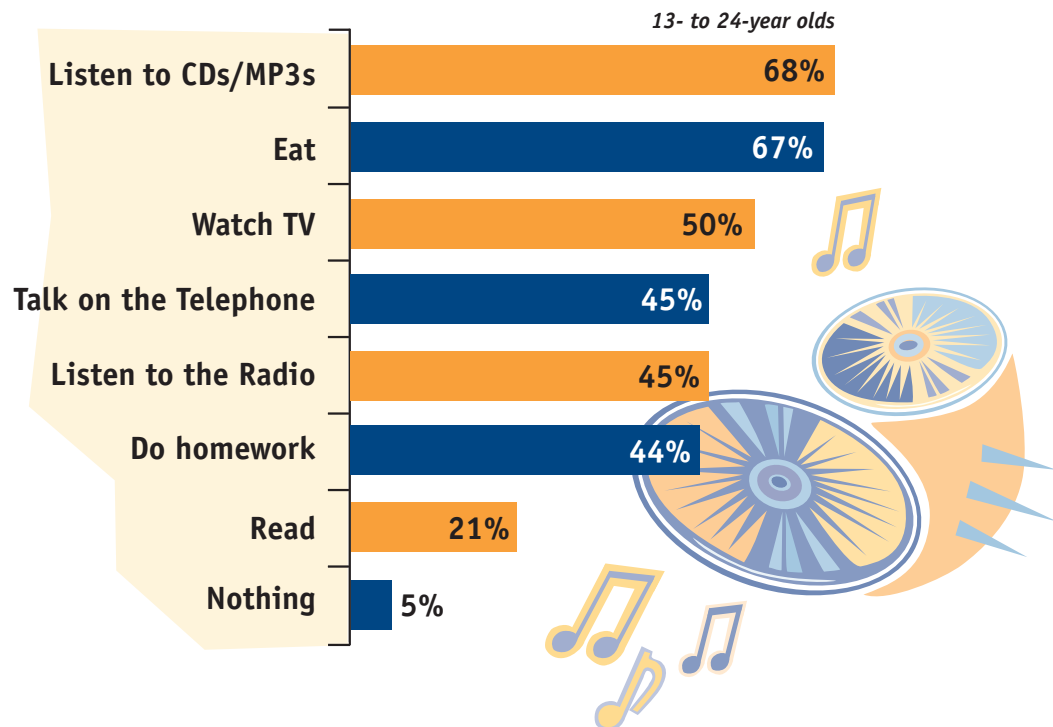
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Table 2 shows that various media have specific functions for the youth generation. Cell phones, landline phones, and pagers are used when information needs to be shared quickly and confidentially with a trusted friend. Movies and video games are used as a diversion and as entertainment. Television is preferred when they search for entertainment, but also when news information is breaking. Radio is often a background media, while magazines are seen as the best place to discover new trends. The Internet is preferred when the activity has an informational component – for activities like shopping, school research, and as a low-risk way to strike up a conversation with somebody.

Table 3 below shows multitasking is rampant among youth. This study concluded that multitasking does not necessarily imply that media convergence is taking place – young people are most likely to say that when they are using two or more media at the same time it is for completely different purposes.

TABLE 3
When you are on the Internet, what else do you typically do at the same time?



Source: Yahoo! and Carat Interactive Born-to-Be-Wired Survey; 2,618 respondents interviewed online in June 2003 by Harris Interactive.

More information about the Born-to-Be-Wired study can be found at http://promotions.yahoo.com/btbw_2003. This site has a webcast of presentations as well as more detailed research results. Research-related inquiries can be directed to teen-research@yahoo-inc.com. Our thanks to both Yahoo!® and Carat Interactive for allowing us to share this study.

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kids high on sugar and caffeine to distract the moderator.

- The moderator should have tangible rewards for the kids during the group. I use a “prize basket.” When a response is given, especially if it’s a shy child, I offer his or her choice of a small item after they make their comment. Key chains, trading cards, funky pencils, and stickers make for great little incentives. This keeps the energy level high and the competition to respond to moderator questions fierce!

The skill of the moderator is paramount to success in qualitative research with kids. We teach our children not to talk to strangers, yet as marketers we expect them to enter a room of strangers and share their views. Their comfort level in doing so is dependent on the physical context but also on having a moderator who is knowledgeable and experienced at interviewing kids.

- Choose a moderator who has experience working with children or teens. Ask for references if necessary. The moderator has a huge responsibility when working with kids. She or he must be very flexible to draw out responses, be insightful and skilled to change the dynamics, and of course, be funny and engaging. All of this comes with experience and training.
- Understand that kids are not adults nor are they small versions of adults. They will typically answer yes and no, and are very good at black-and-white choices. Kids do not like obscure tasks or

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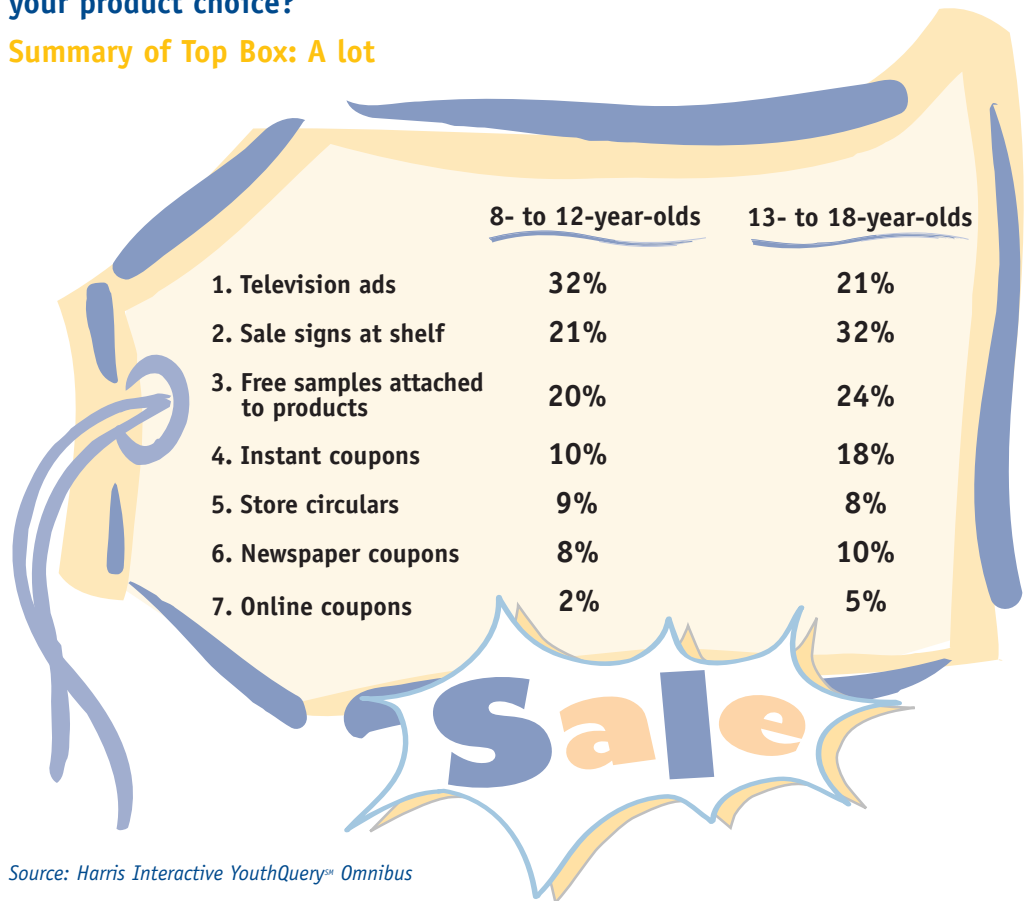
Ask a Question...

...Get an answer

Michele Bolzan from Colgate-Palmolive submitted the following question:

When shopping for personal-care items such as toothpaste, deodorant, shampoo, etc., how much influence do each of the following have on your product choice?

Summary of Top Box: A lot



Source: Harris Interactive YouthQuery™ Omnibus

Have a burning question you would like to ask kids and teens? Here’s your chance to submit a free question for our upcoming YouthQuery youth omnibus. Just send us an email with your suggestion. We will choose one question each month and then publish the results in the next issue of the newsletter.

Come See Us at the AMA Symposium for the Marketing of Higher Education

Harris Interactive will be presenting “What Do Youth Marketers Know that Higher Education Marketers Should?” at the AMA Symposium on November 5 in Miami. For more information, go to www.marketingpower.com.

Come See Us at the College Marketing Summit

Harris Interactive will be presenting “Peek Into the Minds of Today’s College Students: Key Findings on the Habits and Lifestyles of This Powerful Demographic” along with 360 Youth at the College Marketing Summit on December 9 in Scottsdale. For more information, go to www.iqpc.com.

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instructions. This makes them great for ranking exercises. But they will have a hard time articulating reasons "why" they choose something. The researcher has to draw many conclusions and check it out with the kids by asking, "Is this right? Do you mean this?"

- Use projective techniques. Just because kids can be less expressive than adults and may not have a fully formed vocabulary does not mean they don't have opinions they want to share. Projective techniques can help them articulate their feelings.
- Give them prework. A short-and-fun homework assignment that the kids bring to the group can help set the stage for the entire session.
- Expect the moderator to offer custom, creative suggestions to meet your research objectives. Kids respond to sensory approaches. They want to see, taste, feel and touch; your research partner should design creative approaches to conducting the session and to know what is age-appropriate and what is not. One size does not fit all!

Conducting qualitative with kids is some of the most exciting and rewarding work you will ever do. There is no need to feel apprehensive about doing kids research, just focus on building the proper context for success!

Nan Burgess-Whitman is a senior member of the Qualitative Research Practice at Harris Interactive. Nan is trained in conducting qualitative research with children, youth and parents.

Recent Research for Public Release

From time to time, the Harris Interactive Youth Research team is fortunate to work with media, leading foundations and nonprofit organizations, and we often are able to release the results of some of these studies publicly.

Generation Y Earns \$211 Billion and Spends \$172 Billion Annually

American kids, teenagers and young adults, aged 8 to 21, have annual incomes totaling \$211 billion, according to latest projections based on results of a nationwide survey of the Generation Y population. Results show that this group is spending at a rate of approximately \$172 billion per year and is saving at a rate of \$39 billion per year.

The economic downturn and recovery has been felt in the youth market. The annual incomes among 8- to 21-year-olds is down from Harris Interactive's projection of \$231 billion in 2002, although spending is up from a projection of \$155 billion in 2002.

These are among the findings of Harris Interactive YouthPulseSM, an online study of 3,432 young respondents conducted in June 2003. The study projected the income, spending, and savings habits of Generation Y. The spending power of young consumers grows substantially with age and is concentrated in the upper end of the Generation Y age range:

- Preteens (ages 8 to 12) spend at a rate of \$19.1 billion annually, or \$946 per capita;
- Teens (ages 13 to 19) spend at a rate of \$94.7 billion annually, or \$3,309 per capita;
- Young adults (ages 20 to 21) spend at a rate of \$61.3 billion annually, or \$7,389 per capita.

More information about this study is available at <http://www.harrisinteractive.com/news/allnewsbydate.asp?NewsID=667>.

Trends & Tudes Poll Vault

To view previous issues of *Trends & Tudes*, please visit our website at www.harrisinteractive.com/news/newsletters_k12.asp.

The 2003 Wave of YouthPulseSM is Now Available

YouthPulse, Harris Interactive's lifestyle and attitude study of 8- to 21-year-olds, is now available on a subscription basis. YouthPulse provides important insights to youth marketers and can help connect your organization with the Millennial generation. Contact us at 877.919.4765 or info@harrisinteractive.com for details.

Contact Us

To make suggestions regarding this newsletter or to discuss a business issue involving youth or the people and issues that influence today's youth, please contact our Information Desk at 877.919.4765 or info@harrisinteractive.com.

Note to Subscribers

You received this newsletter because you provided your contact information to a member of our youth research team. If you would prefer to be removed from our distribution list, please send an email to HI_youth_research@harrisinteractive.net and write the word "Remove" in the subject line. If others in your organization are interested in receiving our information, please have them forward their email address to HI_youth_research@harrisinteractive.net.