

Trends & TudesSM

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

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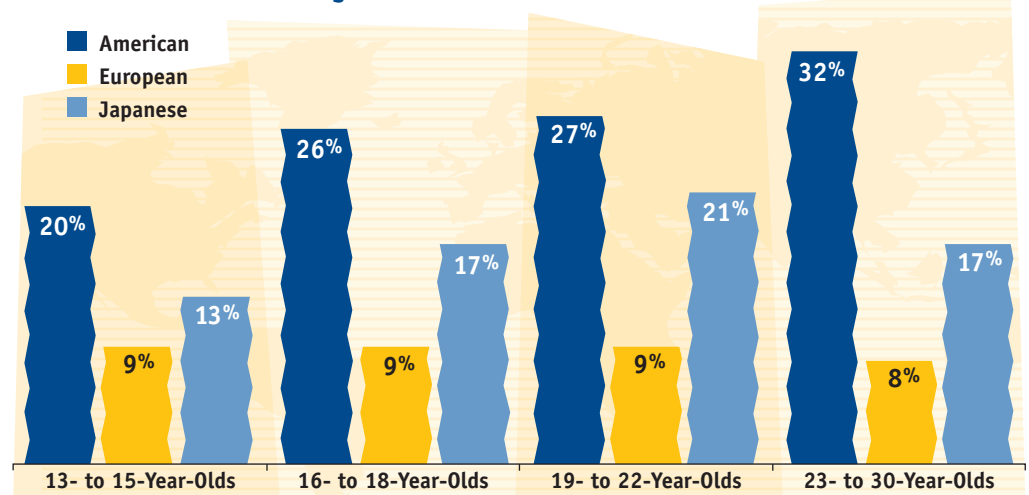
Young Consumers and Cars

Harris Interactive recently released the inaugural wave of AutoYOUTHSM, an annual subscription-based study. Automotive manufacturers and suppliers have long recognized the importance of the youth audience to their current and future business. Early drivers are an important segment – they are numerous and older drivers look to them for trends. Our goals for AutoYOUTH are to inform the auto industry about how brand preferences are formed, to document the influence of youth on others, and to help anticipate the future direction of the automotive market.

For this month's issue of *Trends & Tudes*, we are highlighting findings from AutoYOUTH. This study provides many compelling insights, particularly when we analyze the data for age group differences. It is interesting to view how attitudes and behaviors evolve as a child moves from pre-driving age through high school and early college, and then to a more independent stage as he/she establishes a career and a family.

For instance, as the chart below shows, the preference toward domestic nameplates increases with age while preference for Japanese models peaks in the college years. American models become more appealing as young drivers gain experience and also a more nationalistic attitude takes hold as they age. Preference for Japanese cars generally tends to peak a few years before a consumer makes that first independent car-buying decision.

Preference for Manufacturing Countries



Source: Harris Interactive AutoYOUTH, December 2004; n=3,000 U.S. 13- to 30-year-olds.

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YOUTH AND EDUCATION
The Harris Poll[®] PEOPLE

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Editorial: Our Take On It

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Those in youth marketing constantly hear that today's kids and teens are growing older, younger. In an age of dual-income families our studies have consistently shown that teens are called upon to contribute to household decisions that were once the exclusive domain of parents. Time pressures on parents have grown, and many exhale an audible sigh of relief on their teen's 16th birthday. After a decade spent shuttling from one organized event to another and rushing home from work to be sure a child can get to and from after-school activities, many parents see their child's graduation to driving age as a rite of passage for them as much as for their child. The soccer-mom-and-dad era has ended and a new one has begun. It is time to trade in the minivan for something more stylish. Teen driving represents a newfound independence for parents as much as for children.

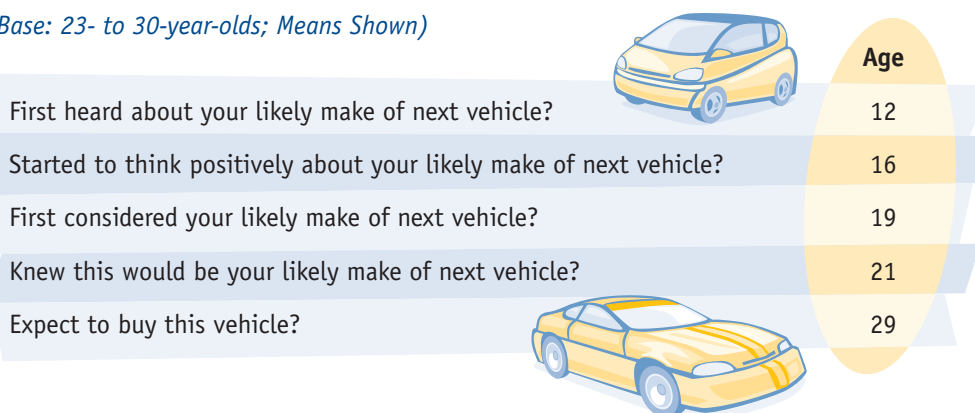
But is 16 too young an age to be allowing teens to drive?

What was once an innocent discussion is heading toward a full-fledged public policy debate. A recent *USA TODAY*® article stated that one in five 16-year-old drivers will crash their cars within their first year of driving. Our AutoYOUTH study showed

Brand preferences are established very early. We asked respondents to think about the next vehicle they expect to buy. Looking at the findings for 23- to 30-year-olds, we see that this group expects to buy their next car at age 29, but that they will have known this is the car they will buy since age 21. They will have first considered this to be their next vehicle at age 19, have started to have an affinity for it at age 16, and have first heard of the car at age 12. Clearly, automotive marketers face an extensive sales and marketing cycle, and waiting until a young consumer is in a position to buy to communicate with them is too late. Automotive affinities take an extraordinarily long time to build and considerable investment is required to have success with younger drivers

Age when you...?

(Base: 23- to 30-year-olds; Means Shown)

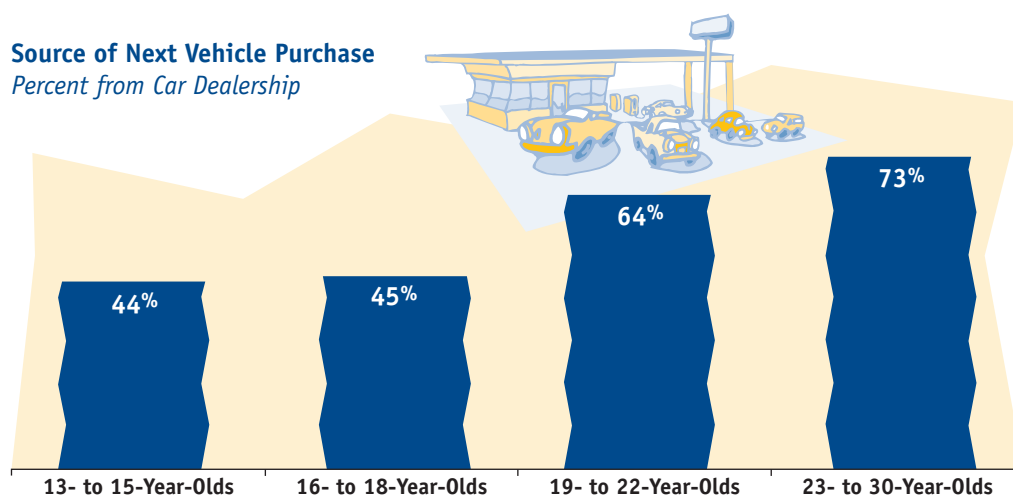


Source: Harris Interactive AutoYOUTH, December 2004; n=3,000 U.S. 13- to 30-year-olds.

Another interesting finding is how the prevalence of the use of car dealers as a source of the next vehicle purchase changes with the age of the respondent. For instance, just 44 percent of 13- to 15-year-olds expect to buy their next car at a dealership, compared with 73 percent of 23- to 30-year-olds. Younger car buyers are more likely to buy from individuals and friends, but they also report a lack of trust in the dealership experience. They are not fearful of car salespeople or the buying experience. Rather, younger consumers are more likely to feel they can't get a good deal at a dealership or that the shopping experience will take too much time.

Source of Next Vehicle Purchase

Percent from Car Dealership



Source: Harris Interactive AutoYOUTH, December 2004; n=3,000 U.S. 13- to 30-year-olds.

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that 30 percent of 16- to 18-year-olds reported being in a car accident in the past year compared to 24 percent of 19- to 22-year-olds and 16 percent of 23- to 30-year-olds. Thirteen percent (13%) of 16- to 18-year-olds told us they had been in an accident that was their fault. That represents nearly 1.6 million traffic accidents that are caused yearly by 16- to 18-year-olds.

Auto accident fatalities are the leading cause of death for young people in America. Teenagers comprise fewer than seven percent of the total population but are involved in 14 percent of all auto accidents. Teens are four times more likely to be killed in an auto accident than individuals older than 25. Every parent of a teen driver needs to look no further than their insurance bill for confirmation that their child is deep into the risk pool.

How can today's teens, who are likely to be at their peak of physical coordination and ability, with PlayStation®-honed reflexes, have such difficulty driving? Recent brain research shown that judgment centers of the brain do not fully develop until the late teen years. Science tells us that many teens do not have brains that can fully control impulses or properly consider the long-term consequences of their actions. Common sense confirms these findings.

The good news is accident data are improving, and that many feel

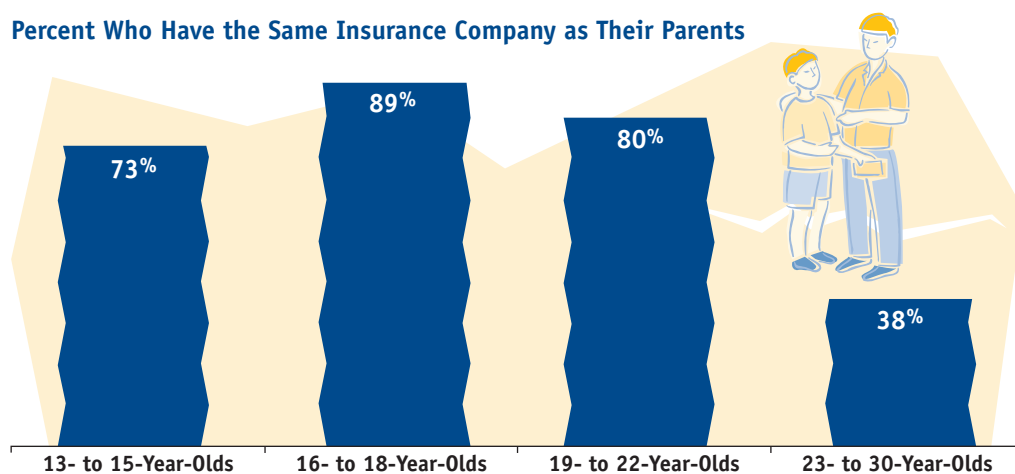
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Just as for many other product categories, teenagers and college-age individuals need to have a sense of control of their shopping decisions and will take the time to shop around. If they don't feel they can get a fair price at a dealership, they will look elsewhere. Even if they intend to go to a dealer, about 9 in 10 told us they would expect to visit more than one dealership that sells the same make of vehicle the next time they are in the market for a car.

The need to be in control of the decision is also evident in the insurance selection decision. As the chart below shows, most young drivers currently have the same insurance company as their parents – that is, until they are in a position where they need to foot the insurance bill themselves. At that point, more than half of young drivers abandon their parents' insurance company and select their own.

Percent Who Have the Same Insurance Company as Their Parents



Source: Harris Interactive AutoYOUTH, December 2004; n=3,000 U.S. 13- to 30-year-olds.

AutoYOUTH provides unique insights into the youth market and answers a wide array of questions that automakers and their suppliers need to know. More information on this study is available at: <http://www.harrisinteractive.com/industries/autoyouth.asp>.

Recent Research for Public Release

“Media Multitasking” Changing the Amount and Nature of Young People’s Media Use. Bedrooms Have Become Multimedia Centers.

Kids Say Parents Don’t Set or Enforce Rules on Media Use.

U.S. children and teens are spending an increasing amount of time using “new media” like computers, the Internet and video games and not cutting back on the time they spend with “old” media like TV, print and music, according to a new study Harris Interactive conducted for the Kaiser Family Foundation between October 2003 and March 2004. Instead, because of the amount of time they spend using more than one medium at a time (for example, going online while watching TV), they’re managing to pack increasing amounts of media content into the same amount of time each day. The study, *Generation M: Media in the Lives of 8-18 Year-Olds*, examined media use among a nationally representative sample of more than 2,000 3rd through 12th graders who completed detailed questionnaires, including nearly 700 self-selected participants who also maintained seven-day media diaries.

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that the causes of this improvement are because of restrictions states have placed on younger drivers. Many states pose curfews or limits on teen driving, require parental or adult supervision, or limit the number of passengers a teen driver can transport. Many major cities have long outlawed driving for those under the age of 18. These restrictions have had an effect – the percentage of 16-year-olds with licenses has dropped in the past decade from 43 percent nationally in 1998 to 31 percent in 2003.

The risk of early teen drivers is clear in the statistics. But, on the whole, states have been slow to react and restrict teen driving. Driving as a teenager is seen as an essential element of American life. Parents are yearning to get their children driving so they can finally feel less pressed for time. And, restricting licenses seems unfair to the teen who is capable of driving responsibly.

What will the future hold? We expect that teen driving will become more and more restricted. Additional laws will be passed to control the types of driving 16- and 17-year-olds can do, and graduated licenses will become standard. Over the past three decades, we have seen a cultural shift in America toward protecting our children and this emerging issue is further evidence of this trend. There will be increased pressure on legislators to act.

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The study – which measured recreational (nonschool) use of TV and videos, music, video games, computers, movies, and print – found that the total amount of media content young people are exposed to each day has increased by more than an hour over the past five years (from 7:29 to 8:33), with most of the increase coming from video games (up from 0:26 to 0:49) and computers (up from 0:27 to 1:02, excluding schoolwork). However, because the media-use diaries indicate that the amount of time young people spend “media multi-tasking” has increased from 16 to 26 percent of media time, the actual number of hours devoted to media use has remained steady, at just under 6½ hours a day (going from 6:19 to 6:21), or 44½ hours a week. For example, one in four (28%) youth say they “often” (10%) or “sometimes” (18%) go online while watching TV to do something related to the show they are watching. Anywhere from a quarter to a third of kids say they are using another media “most of the time” while watching TV (24%), reading (28%), listening to music (33%) or using a computer (33%).

“Kids are multitasking and consuming many different kinds of media all at once,” said Drew Altman, Ph.D., President and CEO of the Kaiser Family Foundation. “Multitasking is a growing phenomenon in media use and we don’t know whether it’s good or bad or both.”

Media in the bedroom. Children’s bedrooms have increasingly become multimedia centers, raising important issues about supervision and exposure to unlimited content. Two-thirds of all 8- to 18-year-olds have a TV in their room (68%), and half (49%) have a video game player there. Increasing numbers have a VCR or DVD player (up from 36% to 54%), cable or satellite TV (from 29% to 37%), computer (from 21% to 31%), and Internet access (from 10% to 20%) in their bedroom. Those with a TV in their room spend almost 1½

hours (1:27) more in a typical day watching TV than those without a set in their room. Outside of their bedrooms, in many young people’s homes the TV is a constant companion: nearly two-thirds (63%) say the TV is “usually” on during meals, and half (51%) say they live in homes where the TV is left on “most” or “all” of the time, whether anyone is watching it or not.



Parental rules. While prior studies indicate that parents have strong concerns about children’s exposure to media, about half (53%) of all 8- to 18-year-olds say their families have no rules about TV watching. Forty-six percent say they do have rules, but just 20 percent say their rules are enforced “most” of the time. The study indicates that parents who impose rules and enforce them do

influence the amount of time their children devote to media. Kids with TV rules that are enforced most of the time report two hours fewer (2:01) daily media exposure than those from homes without rules.

“These kids are spending the equivalent of a full-time workweek using media, plus overtime,” said Vicky Rideout, M.A., a Kaiser Family Foundation Vice President, who directed the study. “Anything that takes up that much space in their lives certainly deserves our full attention.”

To read the complete release, please visit <http://www.kff.org/entmedia/entmedia030905nr.cfm>.

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In another era, it was almost inconceivable that we would raise the legal drinking age to 21, or even that the voting age would be lowered to 18. However, as soon as the culture supported these changes and the topic tipped and became frequently discussed, these policies were quickly enacted. Soccer moms and dads will likely need to keep the minivan around for a few more years!

Trends & Tudes Poll Vault

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

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DistrictWISE: A New Resource for K-12 Education Leaders

Harris Interactive's Youth and Education team offers a 360 degree view of the lives of America's youth. One of the biggest parts of any kid's life is the school environment, and we've worked with hundreds of school districts across the U.S., interviewing more than 75,000 students, 31,000 parents and 12,000 teachers in recent years to help leading school districts maximize their effectiveness.



This research is now the backbone of a new newsletter, launching this month. Much like *Trends & Tudes*, *DistrictWISE* offers a free monthly dose of insights, but targeted specifically to those in school leadership positions.

To read the inaugural issue, with a new perspective on school leadership, visit http://www.harrisinteractive.com/news/newsletters/DistrictWise/Hi_DistrictWISE_2005_vol1_iss01.pdf.

To subscribe, visit <http://www.harrisinteractive.com/news/districtwisesubscribe.asp>.

CollegePulse: A New Research Solution for Higher Ed Marketers

Harris Interactive and Hobsons, the leading provider of recruitment solutions to colleges and universities, have formed a strategic alliance giving higher education marketers more insight than ever into the college decision-making process. CollegePulse includes a full suite of research offerings by Harris Interactive, paired with the unmatched experience of Hobsons. To learn more, please contact Clay Bond, Hobsons National Sales Director, at 800.927.8439 Ext. 6048 or cbond@hobsons-us.com.

Get Smart!

Did you know that Harris Interactive conducts up to five free webinars a month? Spanning a variety of business issues facing a handful of industries, these 1-hour interactive sessions allow you to catch up on the latest research advancement, proprietary industry findings, and best practices. Register for one or more sessions at <http://harrisinteractive.webex.com>. Visit often as our schedule changes weekly.

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 us at 877.919.4765 or info@harrisinteractive.com.

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