

Trends & TudesSM

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

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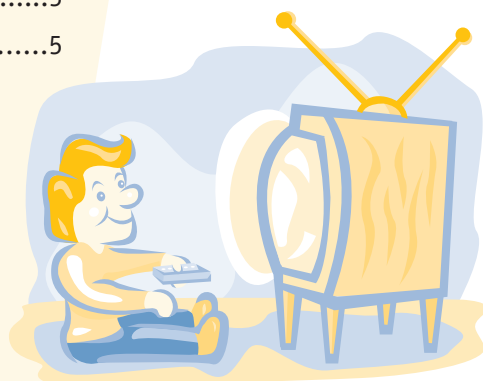
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Generation M: Media in the Lives of 8- to 18-Year-Olds

Understanding the role of media in young people's lives is of importance to anyone whose work focuses on tweens and teens. Such information has implications for advertisers and marketers who are interested in the best methods for getting their messages to young people, including public health groups interested in social marketing on issues such as drug abuse or pregnancy prevention. This information is also important to educators, social scientists and medical professionals who are interested in understanding the influences of media use—both quantity and content—on such areas as children's health, and cognitive and social development.

The Henry J. Kaiser Family Foundation recently released *Generation M: Media in the Lives of 8- to 18-Year-Olds*, a new study which provides valuable information regarding young

people's access to and use of a full range of media—TV and videos, music, video games, computers, movies and print. This report is based on a survey conducted between October 2003 and March 2004 among a nationally representative sample of 2,032 U.S. students in 3rd to 12th grade, who were 8 to 18 years old. Harris Interactive is proud to have conducted the data collection, sampling and weighting for the survey, in which respondents completed detailed, self-administered questionnaires in school about their media use the prior day, and their media habits overall. *Generation M: Media in the Lives of 8- to 18-Year-Olds* is a follow-up to the Kaiser Family



Foundation's 1999 landmark report, *Kids & Media @ the New Millennium* (also conducted with Harris Interactive). An examination of the findings from both studies provides a window into children's access to and use of media today and how this has changed in a relatively short period of time.

Today, as in 1999, nearly all young people have access to at least one TV, VCR, and CD/tape player in their home. Eight in ten young people live in homes with cable or satellite TV (82%) and video games (83%). A significant trend in the past five years has been the growth of the Internet. In 1999 nearly half (47%) of 8- to 18-year-olds had access to the Internet in their homes. Today that figure stands at 74%. Furthermore, a majority of children in each major ethnic and socioeconomic group has Internet access at home. However, there are persistent differences in access among these groups.

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YOUTH AND EDUCATION
The Harris Poll® PEOPLE

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Editorial: Our Take On It

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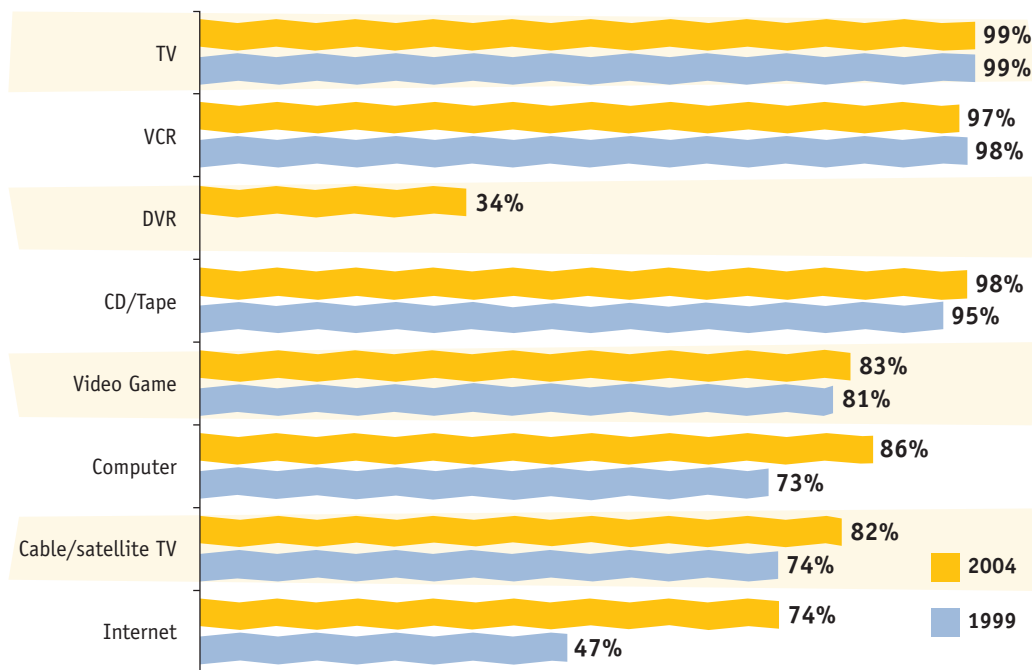
Every day the Harris Interactive Youth and Education Research Practice reviews and analyzes young people's responses to surveys covering a wide range of topics: education, nutrition and exercise, media use, experiences with violence, product purchases and views on advertising. What we don't often get an opportunity to do is to find out what tweens and teens think about participating in these research studies. What do young people themselves think are the role and benefit of research with their age group? We decided to include some questions on our March 2004 Harris Interactive YouthQuerySM omnibus survey of over 1,100 U.S. participants (8-to 18-years-old) to shed some light on this issue.

The focus of our questions concerned kids' and teens' views on doing research with them on behalf of companies. We asked them how important it is to get kids' and teens' opinions to help companies do a variety of activities. We found the lowest support for research aimed specifically at selling more products or developing advertising. Two in ten kids and teens think it is not important to get their opinions to help companies with selling more products (24%) or creating more interesting ads and commercials (19%). This does not

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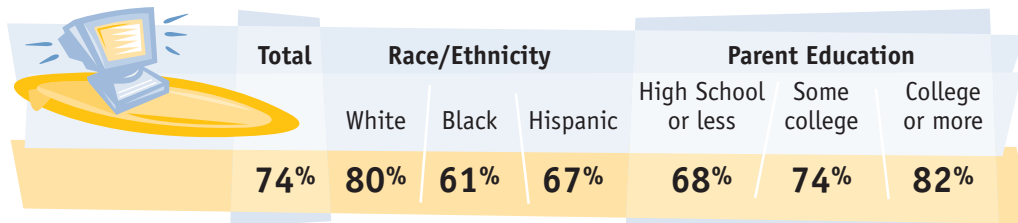
Some technologies were so new or non-existent that they were not included in the 1999 study, but have made significant headway in the intervening years. For example, one-third of young people now report that they have a DVR (digital video recorder) in their homes.

In-Home Media Availability in 2004 and 1999



Source: Generation M: Media in the Lives of 8- to 18-Year-Olds (2005); n=2,032 (8- to 18-year-olds)

Internet Availability at Home



Source: Generation M: Media in the Lives of 8- to 18-Year-Olds (2005); n=2,032 (8- to 18-year-olds)

A main finding of the 1999 report was how kids grow up surrounded by media and that even at young ages, kids' bedrooms are "media hubs." This trend has continued to increase. Most kids have their own radios (97%) and CD/tape players (98%) and 68% of 8- to 18-year-olds have a TV in their room. Since 1999 we have seen increases in the number of young people who have the following in their bedroom (or a portable device that belongs to them): VCR/DVD player (54% now vs. 36% in 1999); computer (31% vs. 21%); cable/satellite TV (37% vs. 29%); and the Internet (20% vs. 10%). In addition to having access to these media from wake-up time to bedtime, having these items in their bedrooms means that parents have less supervision and knowledge of the media consumption that takes place there.

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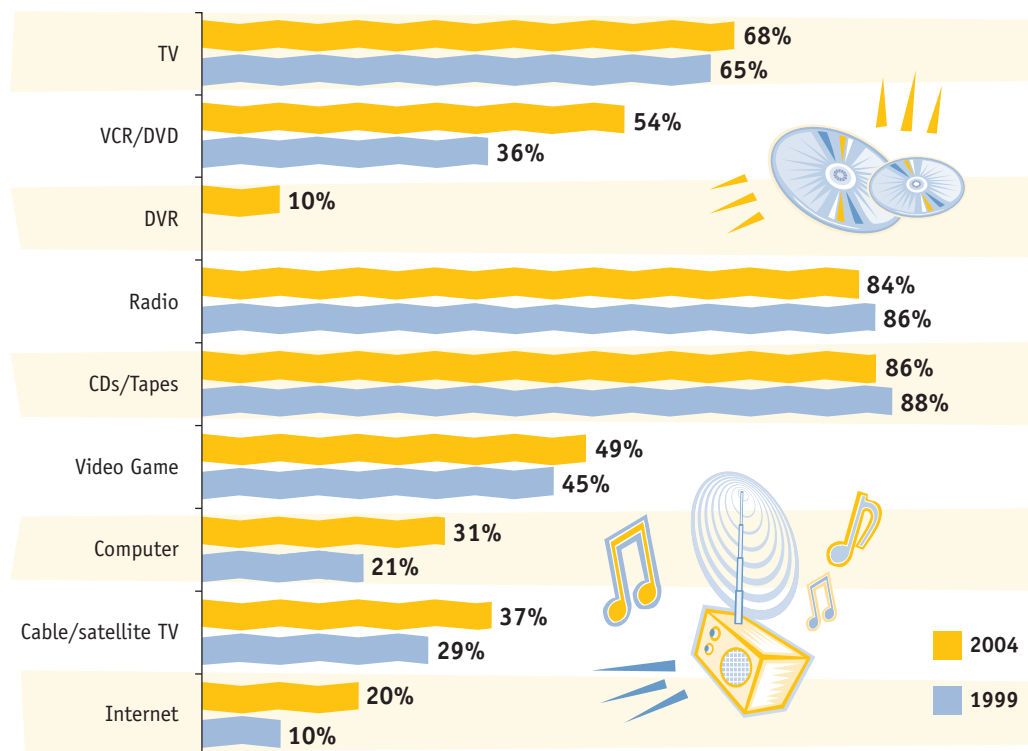
mean that they do not support research with a commercial purpose. Three-quarters of kids and teens (76%) think it is very important to ask their opinions to help companies make products that kids and teens really like, and 60% believe it is very important that companies get their input on making new and interesting products.

What appears to be most important to young people is that companies are in tune with their needs. In addition to strongly supporting the importance of companies incorporating young people's opinions in product development, 69% of kids and teens say it is very important that companies are in touch with young people's interests and concerns. As important as this issue is to young people, many do not believe that adults have a good sense of what young peoples' lives are like. Only 25% strongly agree that the advertising directed toward them is in touch with their interests and concerns. Furthermore, 71% think that adults only understand a little or nothing about what is really going on in their lives today. When we asked young people their opinion about what adults do not understand, three themes emerged. The first theme is "Times Have Changed," best encapsulated by this comment from a 15-year-old boy: "They don't understand about the changing time...and how different life is now than when they were young. Different

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Personal Media Ownership in 2004 and 1999



Source: Generation M: Media in the Lives of 8- to 18-Year-Olds (2005); n=2,032 (8- to 18-year-olds)

Young people certainly have access to a wide range of media, but how much of their time is spent using media? Although access to several different types of electronic media has increased, the total amount of time that young people spend using media has not. On average, 8- to 18-year-olds spend *6 hours and 21 minutes each day* using media (including TV, videos/DVDs/movies, print media, audio media, computers and video games).

What has changed since 1999 is young people's *total exposure* to media. Media exposure is a summation of the amount of time kids spend with each medium. That is, one hour spent listening to CDs plus one hour spent on the Internet equals two hours of media *exposure*. However, if the CD listening and Internet use are occurring at the same time, this translates into one hour of media *use*. In 1999 young people's total media exposure was 7 hours and 29 minutes. Today it has increased to 8 hours and 33 minutes. The increase in media exposure compared to the stability of overall media use highlights the phenomenon of young people multitasking when using media. The Kaiser Family Foundation report reveals that 26% of the time when young people are using one medium, they are also engaged in another media-related activity. A finding that should be of interest (but perhaps not surprise) to educators is that six in ten (61%) young people say they are multitasking most or some of the time they are doing their homework (talking on the phone, instant messaging, watching TV, listening to music or surfing the Web). Thirty percent say they multitask "most" of the time and another 31% say they do this "some" of the time.

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pressures, higher expectations in school. The bar has been raised.” This teen also touches upon the second theme we observed, “High Pressure – Busy Lives.” A 14-year-old girl described it this way: “The overload of the world on our shoulders; the fact that we are probably as busy as, or even busier than, the average working adult—what with school, homework, extracurricular activities and social life. All this and the majority of young people can’t drive themselves places and do all the things they need to do.” The third theme that emerged was that adults don’t understand “The Stuff Young People Need and Like to Do.” This includes fashion, music and choice of friends.

Maximizing the value of research involves both the quality and relevance of the research conducted (asking the right questions and using an appropriate methodology) and the interpretation of the results. There is also a healthy role for intuition. However, a common trap is relying too much on personal experience. This can be particularly true among those doing research with kids, by either generalizing based on your children’s preferences or your own childhood. This can be misleading as one teen told us: “Adults see younger people simply as the people they were when they were young. However, there are many young people out there today who form opinions and care about issues on a larger scale than themselves.”

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The study documents the prominence and pervasiveness of media in young people’s lives from an early age. In addition, by examining young people’s use as well as access to media, this report reveals important information about the role of specific types of media relative to others (e.g., TV vs. Internet) and the ways in which children interact with media when they have only known a world containing the Internet and digital media.

More information on the study, including the executive summary and full report, are available on the Kaiser Family Foundation’s website: <http://www.kff.org/entmedia/entmedia030905pkg.cfm>

What Do Kids and Teens Think?

This month, we offer responses – in young peoples’ own words – to the following question:



How has the death of Pope John Paul II affected you?

“He was a light in a world full of darkness for many people. I respect his life and his leadership and what he was for so many people.”

“It didn’t affect me at all and I am honestly tired of hearing about it.”

“It made me sad and I have been even more persuaded to go to church every Sunday.”

“The pope’s death did not affect me at all, but I do respect his many achievements before he died.”

“I was very sad. I think he was a good pope and did a lot for the people and the church. He will be greatly missed.”

“Not personally in the least, though I did respect the fact that he was a better man than most.”

“I am very sad because I am Roman Catholic, but I know he is with the heavenly father now and his suffering is now over.”

“I’m not Catholic, and I didn’t know very much about the Pope. I think it was sad, but it didn’t really affect me.”

Source: Harris Interactive YouthQuerySM, April 14-18, 2005; n=1,264.

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Youth research can be most powerful when it provides a fuller and deeper understanding of kids' and teens' lives. Too often, marketers use research only as a "fail-safe" activity and as a disaster check for decisions that have already been made. We believe, and the kids and teens themselves tell us, that companies need to conduct research that will help them better understand what is going on in teens' lives today—what their needs are and the context in which they are making their choices and purchasing decisions. This is the type of research that will provide the most value in the long run.

Trends & Tudes Poll Vault

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

For more information, please contact us at:

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AutoYOUTHSM Brings Together Youth and Automotive Expertise – With Powerful Results

In a joint effort between our Youth Research and Automotive & Transportation Research groups, Harris Interactive presents the first annual study providing in-depth market knowledge in this area. AutoYOUTH's study design and survey was co-designed with extensive OEM, advertising agency and supplier feedback, and answers key questions, including:



- How much influence do young adults and teens exert on their family's vehicle purchase decision?
- How are brand preferences formed with young adults and teens?
- What role do parents play in a young adult's vehicle purchase decision?
- What media do young people utilize – magazine, cable TV, network TV, newspaper, Internet and/or radio – when getting informed about a new vehicle?

AutoYOUTH surveys over 3,000 U.S. panelists each year from its own Youth and Automotive Insights panels, particularly U.S. Generation Y-Millennials from ages 13 through 30. To learn more, please contact us at 877.919.4765 or info@harrisinteractive.com.

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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