

**RESEARCH  
ALERT  
YEARBOOK  
2011** EDITION

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# RESEARCH ALERT YEARBOOK 2011 EDITION



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# introduction

With each edition of the *Research Alert Yearbook*, we examine the overarching consumer trends of the prior year and consider where they will likely lead in the coming months, based on the reporting and insights of the editors of RESEARCH ALERT, YOUTH MARKETS ALERT, and ENTERTAINMENT MARKETING LETTER.

The recent recession led to some radical shifts in consumer behavior — made out of necessity and, in some cases, desperation. As the “aughts” came to an end in 2010, Americans were beginning to feel more optimistic about the economy and their finances, though they are still concerned about job security and, as a result, cautious in their outlook, spending, and planning. They have established practical budgets that allow a little wiggle room for fun impulse purchases, but their splurges are special events.

A review of these pages suggests three interlocking trends: Consumers are savvier than ever, better informed than ever, and more connected than ever.

## Savvy

As consumers open their wallets, they are doing so as smarter shoppers. They adopted a variety of strategies to get the most for their money during the recession, and those habits persist. They are particularly sale- and discount-oriented, whether grocery shopping or buying big ticket items. They clip coupons, they bargain hunt, and they only buy when they are satisfied with the price they are paying.

## Informed

The Internet serves as a primary resource for most shoppers. They go online to compare products and prices, “clip” coupons, and make purchases. And many use their mobile phones to shop while at home, on the go, and in store. The rise of smartphones has made mobile shopping even easier for the third of Americans who own such a device, and the rate of adoption for smartphones is accelerating.

## Connected

Electronic gadgets caught the fancy of many Americans, who are now proud owners of iPhones, iPads, Kindles, and more. Smartphones and tablet computers allow them to be connected to the Web from anywhere. The devices have revolutionized entertainment, offering users a convenient distraction wherever they may be. At home, Americans are increasingly accessing video services from the Web; few have cut the cord on their cable service in favor of streaming media, but they relish the option to watch what they want when they want.

The “new normal” in post-recession America is continually shifting, but it is clear that it will take consumers several years to regain the confidence — and spending habits — they had prior to the economic downturn. In the meantime, they are taking an active role as engaged consumers, learning about the options available to them, finding deals, and sharing information with “friends and family” as well as total strangers.



# advertising & marketing

In an era when consumers weigh nearly every purchase against their budgets, marketing and advertising are as important as ever. Consumers are spending, albeit cautiously, but they are willing to pay more for brands that support causes which are important to them.

A majority of shoppers would switch to a new brand or product of equal quality and price in order to support a cause — and women are particularly swayed by causes. Among those causes that were most important to Americans in 2010: economic or job development, health and disease, and hunger.

Causes are also important to gay and lesbian consumers. Most gay and lesbian consumers also want to see companies support LGBT community events. When addressing LGBT consumers, marketers should carefully consider the vastly different segments of this group — older gays, younger gays, and lesbians — to appropriately represent them in advertising.

Marketers and advertisers are embracing new media, especially social networking. And consumers are paying attention to these ads; they particularly notice ads on Facebook that include mention of their actual friends rather than those that list the number of fans the brand has.

Blacks and Hispanics are active users of digital media and more likely than Whites to respond to digital advertising, such as banner and pop-up ads.

Traditional media are effective, too, with most Americans saying they are swayed by ads they see in magazines.

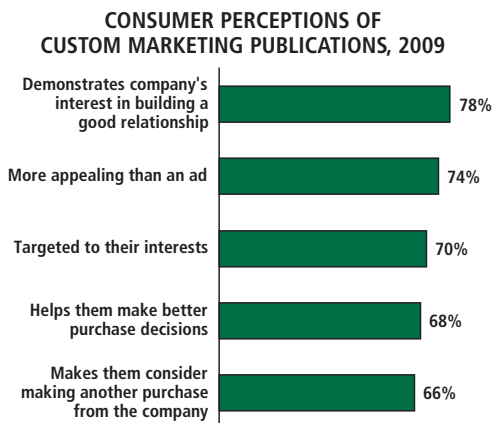
A celebrity spokesperson can also grow consumer awareness. Even when a spokesperson makes a public gaffe, fewer than a third of consumers choose to boycott the associated brand as a result.

## Put It In Print: Getting Marketing Messages To Consumers

The vast majority of American adults (84%) read consumer magazines, according to *Deliver* magazine from the U.S. Postal Service. Most (72%) read issues in print even when the same content is also online. Magazines have great marketing potential:

- ▶ 54% of readers say they influence their recommendations of products to family and friends;
- ▶ 47% went online to search for something they saw in a magazine;
- ▶ 20% trust the marketing messages in magazines.

In addition, consumers have a more favorable view of custom marketing publications than they do of advertising. And more than six in 10 (61%) recall receiving such publications from companies.



SOURCE: *Deliver* magazine

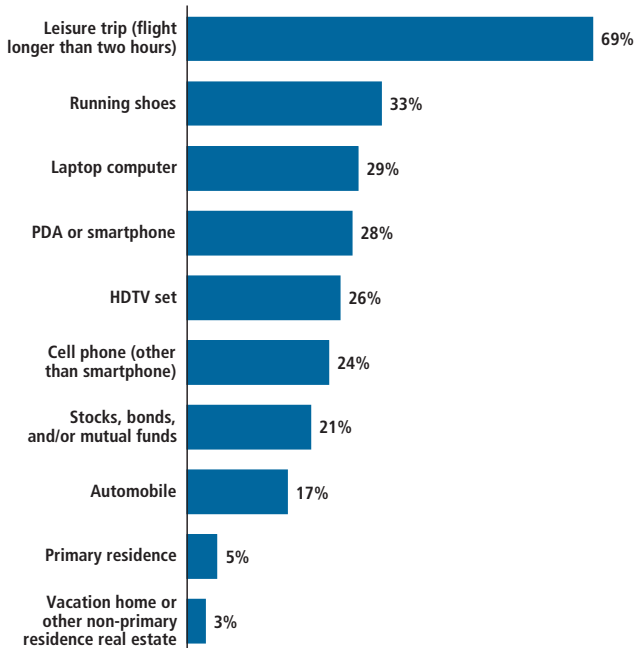
SOURCE: "Why Print Matters," *Deliver* Magazine, [www.delivermagazine.com](http://www.delivermagazine.com). Price: Available online at no charge.

## Distinct Groups Of LGBT Consumers: Who They Are, How To Address Them, And What They Buy

Gay, lesbian, bisexual, and transgender Americans represent a potentially valuable audience, but one with distinct, important differences from group to group under the LGBT umbrella.

LGBT consumers are primarily double-income households without children, giving them a substantial discretionary income. Only 5% of gay couples have a child at home, compared to 20% of lesbian couples. Demographically, LGBT adults live in urban and suburban areas, with 41% in large cities, 20% in medium-sized cities, and 13% in suburbs, according to Community Marketing Inc. Seven in 10 (70%) have a bachelor's degree or higher. More than eight in 10 (82%) are employed, and 27% have annual household incomes of \$100,000 or more.

### PURCHASES LGBT CONSUMERS MADE IN THE PRIOR YEAR, 2010



SOURCE: Community Marketing, Inc.

Four in 10 (40%) have been unaffected by the recession, including 6% who say they have thrived despite the country's economic turmoil. A quarter (25%) say they or their partner took a pay cut during the recession, and 16% lost their job or have a partner who lost his or her job.

LGBT adults are optimistic about economic conditions improving, notes Witeck-Combs and Harris Interactive. They are as likely as heterosexual adults to think the economy has already begun to improve (12% each), but they are more than twice as likely as heterosexuals (21% vs. 10%) to think it will turn around within six months. More than a quarter of LGBT adults (27%) believe their household's financial situation will be better in the next six months, compared to 20% of heterosexual adults. Conversely, 20% think their situation will be worse, compared to 32% of heterosexuals.

Most gay men (77%) and lesbian women (68%) believe that marketers' recognition of their buying power has worked to the community's advantage when it comes to acknowledgement and social acceptance, according to Community Marketing Inc. The vast majority says their purchase decisions are favorably influenced by marketing that supports their community, such as:

- ▶ Sponsorship of LGBT events (91% of lesbians, 89% of gays);
- ▶ Equal employment practices (92% of lesbians, 89% of gays); and
- ▶ Advertising in LGBT media (86% of lesbians, 86% of gays).

Some 95% are in favor of cause marketing, with 43% say-

ing it raises awareness and money for the cause, and 52% claiming it is a marketing tool but also helps the cause.

#### LGBT CONSUMER'S FAVORITE BRANDS, 2010

##### UNAIDED MENTION BY MORE THAN 10%

Absolut  
American Airlines  
Budweiser-Anheuser Busch  
Subaru

##### UNAIDED MENTION BY 5%-10%

American Express  
Apple  
Disney  
IBM  
IKEA  
Levi's  
Miller  
Orbitz  
Southwest Airlines  
Travelocity  
Wells Fargo

SOURCE: Community Marketing Inc.

### Addressing Segments Of The LGBT Market

Gay media is dominated by depictions of gay white males, but that excludes several key segments.

**Lesbians** consider themselves women first, and wish to be marketed as such. The same messages and imagery that works for gay men do not work for lesbians: depictions of sexuality may entice young gay men, but lesbian women prefer imagery of intimacy and romance. Marketing through lesbian-specific media and events can be successful.

**Under-30s** are more ethnically diverse and wish to see that represented in marketing targeting them. They mingle seamlessly with the general population and enjoy mainstream media; they are therefore less influenced by LGBT-specific media.

**Over-55s** are turned off and feel excluded by young, oversexualized advertising. They have a substantial spending power, but do not feel they are represented in LGBT marketing. Because of the stigma attached to being gay when they came out, they tend to prefer gay-exclusive environments, neighborhoods, and media. For example, they are more likely to prefer to vacation in gay enclaves such as Fort Lauderdale, whereas their younger peers enjoy cities that are less "gay-centric," such as Chicago and Washington, D.C.

**Gay Men** are also a diverse group. They most commonly personally identify or have an affinity for "bears" (16%) — big, burly, hairy men. More than one in 10 (12%) identify with "leather," 6% with circuit parties, and 5% Country & Western dancing.

### Terminology

LGBT adults most commonly feel positively about the

term "gay and lesbian" in advertising and marketing, with 82% of women and 79% of men in favor of the term. Women are more likely to prefer "LGBT" (80%) to "GLBT" (66%), while 59% of men feel positively toward both. Both groups have more negative than positive associations with "queer" and "LGBTQQI." (LGBTQQI stands for lesbian, gay, bisexual, transgender, queer, questioning, and intersex.)

LGBT adults do not like the terms "sexual preference" and "alternative lifestyle" in advertising because it suggests their sexual orientation (the preferred term) is a choice. Community Marketing Inc. also cautions against using terms "lifestyle" and "fabulous," the latter particularly because of its overuse.

### LGBT Consumers

Most LGBT consumers are brand loyal. One in eight (12%) stick to specific brands, and 52% are loyal to certain brands but also might try new brands. More than a quarter (26%) prefer certain brands but constantly try new brands. Only 10% are not brand loyal at all.

Gay men (37%) are more likely than lesbians (27%) to dine out at least once a week. Those who dine out spend an average of \$60 a week doing so. Nearly half of gay men (49%) and 31% of lesbians go to bars or clubs at least weekly. Those who do spend an average of \$30 a week. Gay men are also more likely than lesbians to go to movies (40% vs. 29%) and attend live performances (21% vs. 14%). Lesbians (37%) are more likely than gay men (33%) to attend community fundraisers during the course of a year.

Nearly half of LGBT adults (45%) regularly contribute to a personal savings account. Some 38% pay into Social Security and 35% to a 401(k) or employer-sponsored retirement program. More than a quarter (26%) contribute to a company pension plan. Nearly as many regularly build their IRA (26%), stock, bond, or mutual fund investments (23%), and taxable non-retirement accounts (23%).

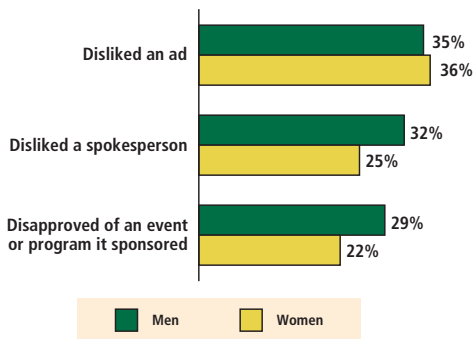
**SOURCE:** "Gay & Lesbian Consumer Index Study" and presentations at the Gay & Lesbian Marketing Conference, Community Marketing Inc., David Paisley, Sr. Research Director, 584 Castro St., #834, San Francisco, CA 94114; 415-437-3800, x102; david@communitymarketinginc.com; www.communitymarketinginc.com. Price: Available online at no charge.

"LGBT Households Continue To Be Optimistic About The Economy," Witeck-Combs Communications, Bob Witeck, CEO, 2120 L St. NW, #850, Washington, DC 20037; 202-887-0500; bwiteck@witeckcombs.com; www.witeckcombs.com. Price: Available online at no charge.

### Ads, Partnerships Affect Consumer Purchases

More than a third of consumers (35%) have chosen not to buy a certain brand because they found its advertising distasteful, including 22% who have done so in the prior year, finds Harris Interactive. More than a quarter have avoided a brand because they disliked the spokesperson it used (28%), and 27% because they dislike a program or event sponsored by the brand. Those aged 18-34 and aged 55 and older are

**MARKETING-RELATED REASONS MEN AND WOMEN HAVE CHOSEN NOT TO PURCHASE A BRAND**



SOURCE: Harris Interactive

the most likely to have avoided a brand because of its advertising or spokesperson. Those aged 55 and older (30%) are more likely than those aged 18-54 (26%) to choose not to buy a brand because of an event or program it sponsored.

SOURCE: "Harris Poll, February 4, 2010," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

**Lucrative Late Night Advertising Reaches Key Demographics**

While it may be true that fewer people use media in the late night hours, those who do can be a lucrative — and inexpensive — audience for advertisers, finds The Media Audit. The key is knowing who they are and what they want to buy.

**Online:** Nearly a quarter of Americans (24%) are online between midnight and 8:00 a.m. They are more likely than average to have incomes of \$150,000 or more (37.9%). They are also more likely than average to have recommended a bank or stock broker in the prior year (42.5%). Those who are online between midnight and 8:00 a.m. are 59% more likely than average to be frequent domestic travelers and 29% more likely than average to frequently stay in hotels. Frequent travel is defined as those who take six or more domestic flights in a year and frequent hotel visitors are defined as those who stay in a hotel 10 or more times in a year.

**Television:** Late night TV viewers are 47% more likely than average to be heavy fast food consumers, visiting fast food restaurants five or more times a week. Those who watch their late local news are 28% more likely than average to be heavy fast food consumers.

**Radio:** Those who listen to radio between midnight and 5:00 a.m. are 40% more likely than average to be in the market to buy a car. While "drive time" may yield more listeners, late night radio has a higher proportion of listeners who are in the market to buy.

SOURCE: "National Study," The Media Audit, Robert Jordan, President, 10333 Richmond Ave., #200, Houston, TX 77042; 800-324-9921; rjordan@themediiaaudit.com; www.themediiaudit.com. Price: Call for information.

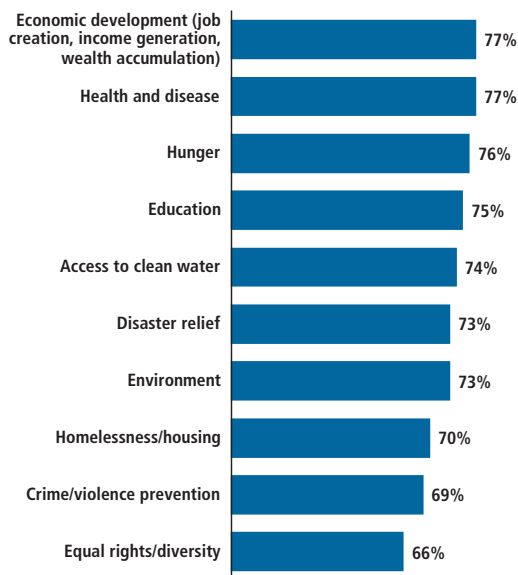
**Consumers — Especially Moms — Want Companies To Support Causes**

More than four in 10 consumers (41%) have bought a product in the prior year because it was associated with a cause or issue, finds Cone Inc. In addition, 80% of shoppers would switch to a comparable brand, in terms of price and quality, to purchase from a company that supports a cause. A majority (61%) would try a new brand or one they've never heard of in order to support a cause, 41% would try a generic or private label brand (versus a national brand), and 19% would buy a more expensive brand.

Americans are more likely to prefer companies to get involved in a cause that it will support over a long term (61%) than to allow the consumer to vote for a cause that the company will focus its support on for a month or year (39%). They would rather a company support a cause that is relevant to them personally (54%) than one that is relevant to the company's business, such as Coca-Cola supporting bottle recycling (46%). Shoppers also prefer to feel like their purchase makes a difference with a portion of their spending going toward a cause (53%) than for a company to make a lump sum donation to a charity or organization.

Moms are particularly supportive of cause marketing. The vast majority (95%) say it is an acceptable practice for a company to align with a cause in its marketing efforts, compared to 88% of the general population. More than nine in 10 (93%) would switch brands to one that is connected to a cause, compared to 80% of Americans overall, and 93% of moms say they want to buy products that support causes, compared to 81% overall.

**CAUSES AND ISSUES AMERICANS WOULD MOST LIKE COMPANIES TO ADDRESS, 2010**



SOURCE: Cone

Moms are also more likely than average to say that cause marketing helps them decide where to shop (88% vs. 75%), which products or services they recommend (88% vs. 76%), and what companies they want to see doing business in their communities (90% vs. 79%).

**SOURCE:** "2010 Cause Evolution Study," Cone Inc., Carol Cone, 855 Boylston St., Boston, MA 02116; 617-227-2111; ccone@coneinc.com; www.coneinc.com. Price: Call for information.

## In Marketing, Not All Media Are Created Equal, Say Consumers

As consumers aged 18-34 make purchase decisions, they weigh advice from a variety of sources, and the most influential being family and friends, but traditional and new media sources are not far behind. Comparing new media sources to traditional media sources (such as articles found online vs. in a newspapers), traditional media tends to be more influential.

### MOST INFLUENTIAL ADVICE SOURCES, 18-34-YEAR-OLDS, 2009

Personal advice from family or friends	.59%
TV news or other broadcasts	.40%
Search engines	.39%
Ads on TV	.36%
Articles in newspapers or magazines	.33%
Ads in newspapers or magazines	.31%
Articles online	.28%
Radio news or other broadcasts	.28%
Direct mail	.24%
Ads on radio	.20%
Emails from retailers or manufacturers	.20%
Ads online	.19%
Messages or posts on social media, such as Facebook or Twitter	.18%
Billboards	.15%

**SOURCE:** ARAnet

**SOURCE:** "Buying Decisions Survey," ARAnet, Scott Severson, President, 701 S. 5th St, Hopkins MN, 55343; 888-205-4010; sseverson@aranetonline.com; www.aranetonline.com. Price: Call for information.

## Youth Exposure To Alcohol Ads Declines From 2001-2008

Exposure to alcohol advertising in magazines among 12-20-year-olds fell 48% from 2001 to 2008, according to the Center on Alcohol Marketing and Youth (CASA). However, some alcohol beverages are more prominent than others. Teens are less likely to view spirits ads and more likely to see beer spots. Youth exposure to alcopops peaked in 2002 and their exposure to wine ads began declining after 2006.

Teens and young adults tend to be exposed to the same brands. Some 5% of alcohol brands are responsible for more than half of the youth exposure in magazines, with Patron Silver Tequila, Absolut Vodka, Ketel One Vodka, and

Kahlua Liqueurs as notably visible.

The alcohol industry has made strides in preventing youth from viewing their ads. It began self-regulating in 2003 and most of the current exposure is attributed to teens and young adults reading publications that typically appeal to older readers, such as *Allure*, *Rolling Stone*, and *ESPN the Magazine*.

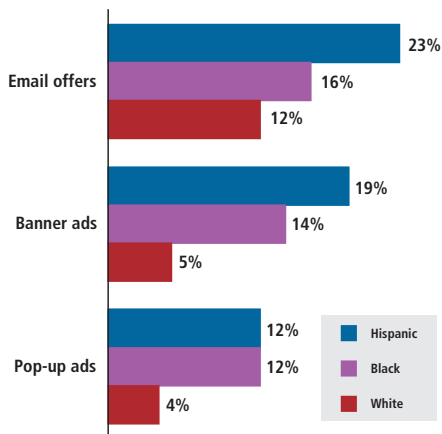
**SOURCE:** Center on Alcohol Marketing and Youth, John Hopkins Bloomberg School of Public Health, 624 N. Broadway, #288, Baltimore, MD 21205; 410-502-6579; www.camy.org.

## Emerging Majorities Respond To Digital Advertising Messages

Hispanics are more likely than Blacks or Whites to respond to digital advertising, including banner ads and email promotions, according to ARAnet. Both Hispanics and Blacks are three times as likely as Whites to respond to pop-up ads.

**SOURCE:** "Hispanic Marketing Trends Survey," Orca, Hector Orca, Co-Founder and Chairman, 11620 Wilshire Blvd., #600, Los Angeles, CA 90025; 310-444-7300; horci@laagencia.com; www.laagencia.com. Price: Available upon request at no charge.

DIGITAL MARKETING MESSAGES CONSUMERS ARE "VERY LIKELY" TO RESPOND TO, BY RACE/ETHNICITY, 2010



**SOURCE:** ARAnet

**SOURCE:** "AdFusion," ARAnet, Scott Severson, President, 701 S. 5th St, Hopkins MN, 55343; 888-205-4010; sseverson@aranetonline.com; www.aranetonline.com. Price: Call for information.

## Marketers Acknowledge Hispanics' Influence, Fail To Reach Them

A survey of senior marketers at Fortune 1000 companies finds that a slight majority (51%) claims they do not market to Hispanics, reports Orca. In addition, 82% have no plans to begin or expand their Hispanic marketing program. [ED: It has been the experience of EPM Communications that many marketers are skittish about discussing their Hispanic marketing efforts for fear of criticism; most prefer to say they do not market to the group when, in fact, they do, which may have also skewed the results of the Orca survey.]

Despite their aversion to Hispanic marketing:

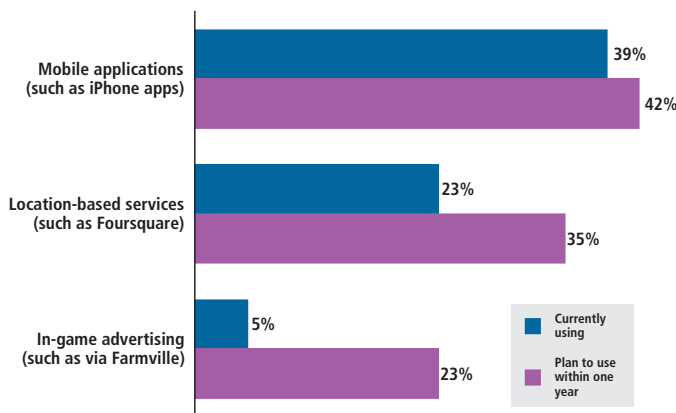
- ▶ 89% of marketers believe they will impact American taste in foods within the coming five years;
- ▶ 87% believe that Hispanics will influence fashion and beauty trends;
- ▶ 82% expect Hispanics to impact entertainment preferences; and
- ▶ 78% think they will have an effect on technology and communication trends.

## Marketing On Social Media, Emerging Platforms

Most marketers and advertisers (63%) have already implemented social media marketing plans, and of those who have not, 62% plan to do so within a year, finds Pivot Conference. Most of those who have worked on a social media program (89%) believe they were successful.

A majority of those with social media marketing programs (74%) say they devote less than 20% of their online marketing resources — including budget and staff — to the initiatives. Most (87%) plan to increase their investment in social media in the coming year. In addition to social media, many marketers are using or exploring emerging platforms to connect with consumers.

MARKETERS USING OR PLANNING TO USE EMERGING MEDIA PLATFORMS TO REACH CONSUMERS, 2010



SOURCE: Pivot Conference

SOURCE: "Pivot Conference Survey," Pivot Conference, Alison Murdock, Research; 678-661-1042; alison@pivotcon.com; pivotcon.com.

## The Means Of Marketing: Mail Vs. Email

A slight majority of adults (53%) say they are more likely to play close attention to information they receive via postal mail than email, according to Epsilon, a targeting firm. They prefer postal mail to email for convenience factors, such as:

- ▶ Ability to read info whenever it is convenient for them (79%);
- ▶ Ability to refer back to info when needed (66%); and
- ▶ Can easily take mail to different places to read (46%).

They also cite factors concerning trust issues:

- ▶ 36% say information is more private when sent via postal mail;
- ▶ 25% think a lot of online info cannot be trusted; and
- ▶ 20% simply are more trusting of information sent by mail than email.

The type of information consumers receive affects their preference in how they would like to receive it. In terms of sensitive health info, they overwhelmingly prefer mail (43%)

to email (9%). The same is true of all health info to varying degrees, including prescription information (41% prefer mail, 11% prefer email), general health info (37% vs. 11%), and over-the-counter medication (34% vs. 9%). For travel information, 28% choose mail, whereas 13% choose email. They even prefer mail (31%) over email (6%) for information about household services.

SOURCE: "Finding The Right Channel Combination," Epsilon, 4401 Regent Blvd., Irving, TX 75063; 800-309-0505; info@epsilontargeting.com; www.epsilon.com.

## Name Dropping Aids In Facebook Ad Recall

Facebook users are twice as likely to remember an ad if it features actual names of their friends (8% vs. 4%), according to Nielsen. This means the ad specifically mention names who are fans of a brand rather than listing a generic number that are fans of a brand.

User purchase intent is four times higher when friends' names are mentioned in the ad (8% vs. 2%).

SOURCES: Facebook, Sean Bruich, Measurement Research, 471 Emerson St., Palo Alto, CA 94301; 650-543-4800; www.facebook.com.,

Nielsen, Jon Gibs, VP Media Analytics, 770 Broadway, 14th Fl., New York, NY 10003; 646-654-5000; nielsenwire@nielsen.com; www.nielsen.com

## factoids

- ▶ A quarter of consumers (28%) say a male voice is a more effective sales tool than a female voice (7%) in **automobile advertising**; however, 66% say it does not matter whether the voice is male or female. (*Harris Interactive; phone: 212-539-9749*)
- ▶ Most TV viewers (86%) believe **commercials** are louder than the TV shows during which they air, and 93% of those say it frustrates them. (*Harris Interactive; phone: 212-539-6900*)
- ▶ Most marketers (63%) have already implemented a **social media strategy**, and 87% plan to increase their investment in social media marketing in the next year. (*Pivot Conference; phone: 678-661-1042*)
- ▶ Three quarters of adults (75%) have found a **TV commercial** confusing; among those aged 55 and older, 29% say ads on TV are often confusing. (*Harris Interactive; phone: 212-539-9600*)
- ▶ Most TV viewers (86%) believe **commercials** are louder than the TV shows during which they air, and 93% of those say it frustrates them. (*Harris Interactive; phone: 212-539-6900*)
- ▶ Half of adults aged 18-34 are indifferent toward **targeted advertising** based on their TV, Internet, and mobile usage, compared to 42% aged 25-54, and 25% aged 55 and older. (*Parks Associates; phone: 972-490-1113*)
- ▶ People who **read email** via a mobile device or smartphone spend 15% more time reading email than do those who read message on a PC. (*Litmus; phone: 866-787-7030*)

### FAST FACT

#### Online Ads

- ▶ 43% of consumers' media purchases are influenced by online advertising.

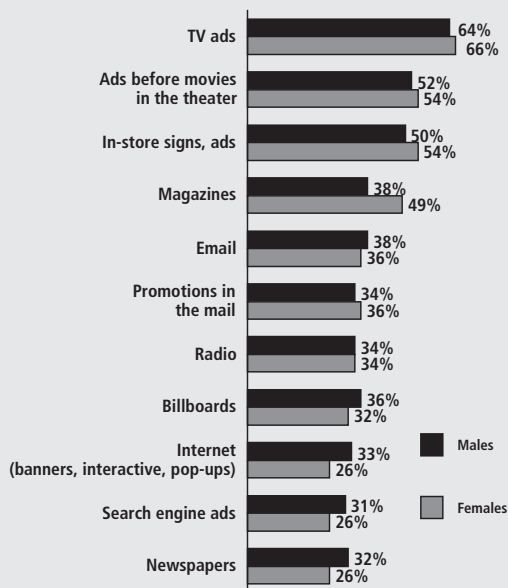
**SOURCE:** Burst Media; phone: 518-724-1700

### FAST FACT:

#### Multicultural Females Notice TV Ads, Spots Before Movies, And Mag Ads

Multicultural youth aged 14-24, in general, are more apt to pay attention to all types of advertising than their White counterparts. Moreover, multicultural females tend to pay more attention than males to TV spots and magazine ads.

ADVERTISING CHANNELS THAT CATCH MULTICULTURAL 14-24 YEAR OLDS' ATTENTION, BY GENDER, 2009



**SOURCE:** The Intelligence Group

**SOURCE:** The Intelligence Group, Angel Ciangi, 2000 Avenue of the Stars, Los Angeles, CA 90067; 424-288-2873; aciangi@intelg.com; www.trendcentral.com.



# affluence

Affluent Americans are middle aged, well educated, and predominantly White. Demographic differences affect affluent households' activities — those with children are more likely than those without kids to attend sports events, go to movies, and visit theme parks; those without children are more likely to attend estate sales, art auctions, and gallery exhibits. Affluent households with children also own more electronic devices.

Although affluent households are more likely to be older, they are well versed with technology. They are online for more than three hours in a typical day, and are more likely than average to own tablet computers, e-readers, and smart-phones.

Affluent Americans are avid online shoppers. The vast majority goes online to compare prices and brands, find retailers, and read product reviews. They are most likely to book travel, buy tickets, and purchase books online.

Younger affluent households spend more time online per week than their older counterparts and visit more websites. Older affluent households spend more time reading and watching TV than younger affluent households.

The recession has made a permanent mark on affluent Americans just as it has with less wealthy Americans. A majority of affluent households believe that the recession continued throughout 2010, a year in which more than a third affluent households spent less on luxury goods, and most expected to would spend less and save more overall. Most affluent households reported losing money in savings or investments.

## Who Are The Affluent? Demographics Have The Answer

The wealthiest 20% of American households (totaling 23.4 million households) comprise the affluent market and have annual incomes of \$100,250 or more, according to Unity Marketing. Super affluents are the top 5% of households, with incomes of \$180,000 or more; and the ultra affluent includes the top 2% of households, with incomes of \$250,000 or more. While the most affluent households seem like an ideal target for marketers, Pam Danziger of Unity Marketing points out that there are only 2.5 million ultra affluent households and 5.9 million super affluent households, compared to a much larger number of generally affluent households.

The demographic differences of affluent households compared to all American households goes beyond income:

- ▶ They are more educated: 60% of affluent households are headed by someone with a college degree, compared to 31% of all households. Affluent shoppers are smart and do their research before making purchase decisions.
- ▶ They are more likely to be married: 80% of affluent households are married couples, including 84% of ultra affluent households. Many affluent households benefit from two incomes. The average single-earner household income is \$65,938, compared to \$106,081 for dual income households.
- ▶ They are less diverse than the overall population: Whites account for 80% of affluents, compared to 6% each for Black, Asians, and Hispanics.
- ▶ Americans reach affluence in an age window ranging from age 35 to 54, when they are in their peak earning years. Affluent Americans aged 34-44 spend 40% more on luxury goods than those aged 45-54. Following years of comprising the majority of affluent households, in

2010 35-44 year olds account for a smaller proportion (39.4 million households) than those aged 45-54 (42.0 million households). By 2020, the younger group (40.7 million households) will again outnumber the older group (38.8 million households).

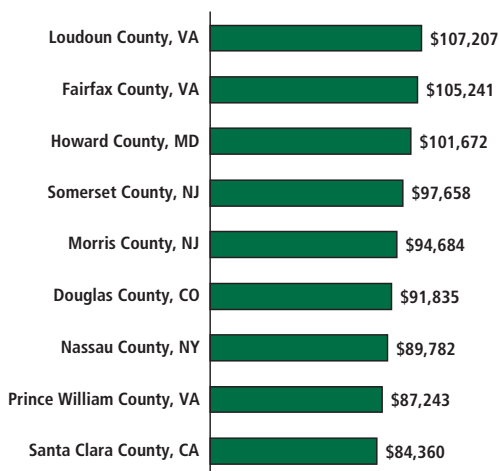
**SOURCE:** "Demographics of Affluence," Unity Marketing, Pam Danziger, President, 206 E. Church St., Stevens, PA 17578; 712-336-1600; pam@unitymarketingonline.com; www.unitymarketingonline.com. Price: Call for information.

## Affluent Americans Cautiously Begin To Spend As Recession Lifts

Nearly half of affluent Americans (44%) bought luxury items in the second quarter of 2010, up slightly from 42% in the first quarter, but not as high as pre-recession levels, according to Unity Marketing. Unity defines affluence as those with average annual household incomes of \$100,000 or more.

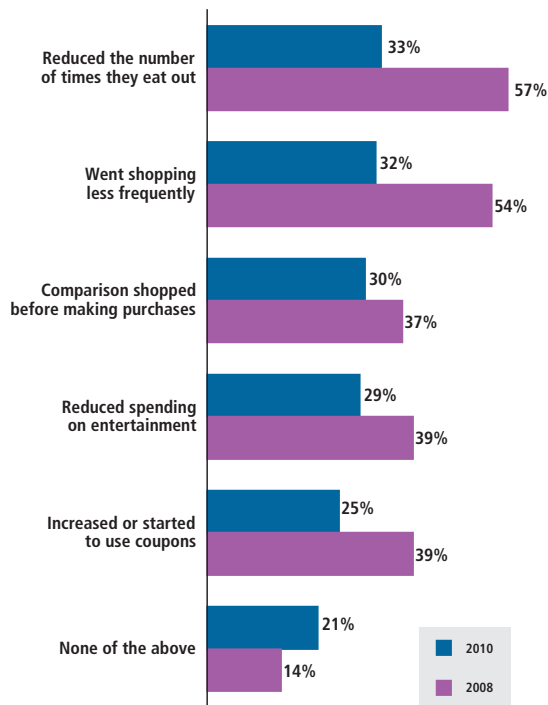
About a quarter of affluent consumers (26%) say that on the scale of "good, better, and best," they mostly have "good" and scale back on some purchases in order to be able to afford "the good life" in other areas. Nearly four in 10 affluent consumers (38%) say they mostly buy better than average products and services, with occasional top of the line

U.S. COUNTIES WITH THE HIGHEST MEDIAN INCOMES, 2009



SOURCE: Unity Marketing

AFFLUENT CONSUMER SHOPPING HABITS COMPARED TO THE PRIOR YEAR, 2010 VS. 2008



NOTE: Affluent Americans are defined as those with average annual household incomes of \$100,000 or more.

SOURCE: Unity Marketing

purchases on items that matter most to them. Some 21% of affluent consumers tend to buy the best of the best, and always aim to get top of the line products and services. One in seven affluent consumers (15%) say that luxury purchases are not a part of their lifestyle.

Nearly eight in 10 luxury consumers (79%) have made changes to their purchasing habits in 2010, down from 86% who reported doing so in 2008. Unity Marketing's Luxury Consumption Index — which measures current and future luxury spending and current and future financial well-being — shows that affluent Americans are increasingly feeling better about their financial situation and are spending again after bottoming out in September 2008.

**SOURCE:** "Luxury Report 2010" and "Luxury Consumption Index," Unity Marketing, Pam Danziger, President, 206 E. Church St., Stevens, PA 17578; 712-336-1600; pam@unitymarketingonline.com; www.unitymarketingonline.com. Price: Call for information.

## Affluent Americans Spend On High-End Technology, Despite Concerns About Continuing Recession

Affluent Americans — defined as those with annual household incomes of \$100,000 or more — account for 24.5 million households (or 21%) in 2010, up from 23.9 million in 2009, according to Ipsos Mendelsohn.

The number of affluent adults who use the Internet grew to 43.3 million, up 2.3% from 2009, matching the growth in the number of affluent households. They spend an average of 25.3 hours a week online, up from 22.6 hours, and they visit an average of 11.2 sites per month, up from 10.8. The Internet continues to be the purview of the young, with affluent 18-34 year olds spending the most time online and visiting a greater number of sites than their older counterparts.

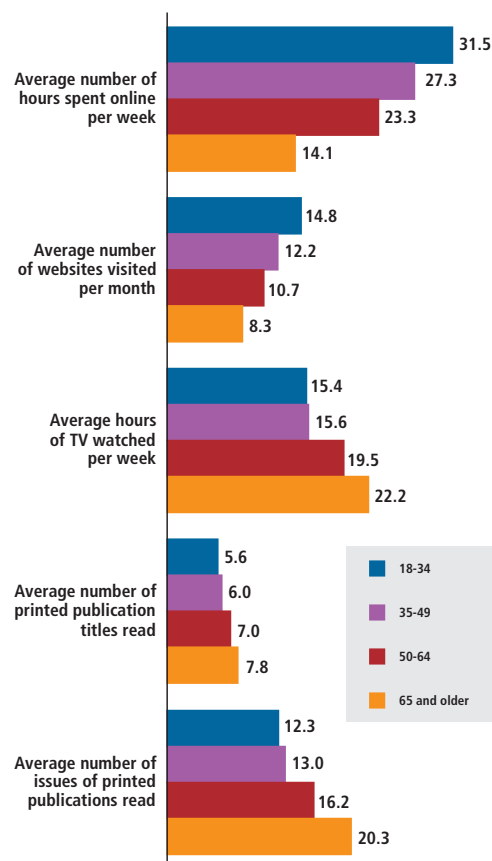
The number of affluent adults who watch television also increased to 43.2 million, up 1.6%. They watch an average of 17.6 hours per week, the same as in 2009.

Fewer affluent adults (36.2 million) read print publications, down 1.9% from 2009. They read an average of 5.9 different titles, down from 7.0. They are also reading fewer issues of those titles, 13.3 down from 15.8.

Affluent adults aged 50 and older spend more time than average watching TV and read more print publications than their younger peers.

Television advertising reaches 88% of affluent adults, and 63% of those have some interest in the ads they see in that medium. Eight in 10 affluents (80%) see advertising in magazines, and 63% have interest in those ads. Slightly fewer (77%) see advertising in newspapers, though the same proportion (63%) finds those ads to be of interest. Only half (50%) of the 76% of affluents who see advertising on websites have interest in those ads, and even fewer (42%) of the 79% who see ads in mail sent to their home say those ads are of interest.

AMOUNT OF TELEVISION, ONLINE, AND PRINT MEDIA AFFLUENT AMERICANS CONSUME, BY AGE, 2010



**SOURCE:** Ipsos Mendelsohn

## Affluent Technology Use

Affluent adults are embracing new technologies, such as smartphones, e-readers, and netbook and tablet computers (such as an iPad). More than four in 10 (43%) own one of those types of devices, and another 18% plan to buy one in the next year.

Nearly four in 10 (38%) have downloaded an app to their smartphone or other wireless device. As expected 18-34 year olds are 41% more likely than other affluents to have done so, and 35-49 year olds are 19% more likely than average to have done so. The types of apps they download are similar to those downloaded by the general public (see "Games Are Most Popular App," p. 2). Of those who have downloaded an app:

- ▶ 57% downloaded a game app;
- ▶ 56% a music app;
- ▶ 51% a weather app;
- ▶ 47% a GPS/directions/map app;
- ▶ 35% an entertainment app;
- ▶ 33% a news app; and
- ▶ 30% a social network app.

**Affluence And The Recession**

Nearly three quarters of affluent consumers (73%) believe the recession continues, compared to 21% who think it has ended, according to Unity Marketing. The remaining 6% are unsure. That means that affluent shoppers will have “a more cautious attitude among affluents toward spending into 2011,” says Pam Danziger, President of Unity Marketing.

Although overall spending on luxury goods increased nearly 30% in 2009, the number of consumers who bought luxury goods decreased. More than four in 10 affluent shoppers (41%) bought a home luxury item in 2009, down from 52% in 2006; 44% bought a personal luxury item, down from 54% over the same period; and 45% made an experiential luxury purchase, down from 60%.

More than a third of luxury consumers (36%) plan to spend less on luxury goods and services through the remainder of 2010, compared to 6% who plan to increase their spending, according to the Luxury Institute. In addition, a quarter of affluent shoppers (20%) plan to spend more on discounted luxury goods through the remainder of 2010. That is on top of 25% who have already been spending more on discounted luxury items during the first eight months of 2010 compared to 2009.

One reason they are not willing to spend as much on luxury is because they feel that the qualities of luxury — most commonly citing superior quality (76%), craftsmanship (65%), and customer service (57%) — are on the decline. A slight majority (56%) say craftsmanship has been slipping, 51% say the same of quality, and 50% have noticed a decline in customer service. In addition, 48% think that luxury goods are also losing design value.

“Luxury Report 2010,” Unity Marketing, Pam Danziger, President, 206 E. Church St., Stevens, PA 17578; 712-336-1600; pam@unitymarketingonline.com; www.unitymarketingonline.com. Price: Call for information.

“State of the Luxury Industry WealthSurvey,” Luxury Institute, Martin Swanson, VP, 115 E. 57th St., 11th Fl., New York, NY 10022; 914-909-6350; mswanson@luxuryinstitute.com; www.luxuryinstitute.com. Price: Call for information.

**Wealthy Consumers Shop Online, Use Web To Find The Best Prices**

More than three quarters of wealthy Americans — defined as those in the top 10% of the population in terms of annual household income — use search engines when shopping for luxury goods and services, according to The Luxury Institute. Of those who do, 89% have made a purchase based on a search. Two thirds (65%) say search is the best way to learn about new products.

Google facilitates the lion’s share of their searches, accounting for 77%.

The vast majority (83%) use search engines daily, including 29% who do so via a smartphone. They perform an average of 14 searches a day. Their top reasons for using a search engine when shopping are to:

- ▶ Find the best price (78%);
- ▶ Compare different brands (77%);
- ▶ Locate a specific luxury retailer’s website (77%);
- ▶ Find out where to buy a product (75%); and
- ▶ Read consumer reviews (72%).

Men are more likely than women to use searches as a tool when shopping online, but women outpace them in some categories. Women are more likely than men to search for:

- ▶ Fashion apparel information (48% for women vs. 24% for men);
- ▶ Beauty, skincare, and grooming products and services

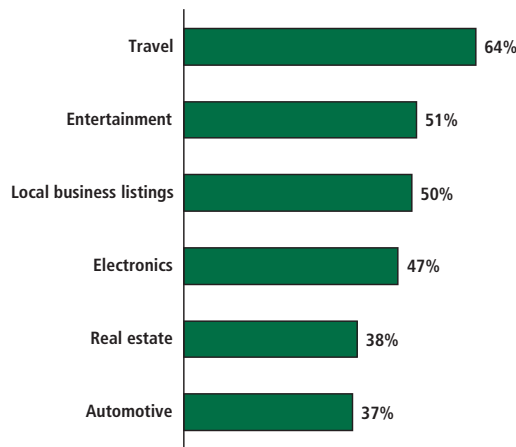
**AFFLUENT TECHNOLOGY OWNERSHIP AND INTENT TO BUY, 2010**

	OWN	PLAN TO BUY IN THE NEXT YEAR
Digital camera	63%	5%
Digital music player	51%	7%
Flat-panel color TV	42%	9%
Videogame system	37%	2%
Smartphone	33%	10%
Blu-Ray player	21%	8%
HD camcorder	17%	3%
Satellite radio receiver	10%	1%
Large-format photo printer	7%	1%
Tablet computer or netbook	6%	4%
e-Reader	5%	4%
Home theater projector	4%	2%
3DTV	1%	2%
Slingbox	1%	1%
Apple TV	1%	1%

SOURCE: IpsosMendelsohn

SOURCES: “2010 Mendelsohn Affluent Survey,” Ipsos Mendelsohn, Bob Schullman, 841 Broadway, New York, NY 10003; 212-677-8100; bob.schullman@mmsurveys.com; www.mmsurveys.com. Price: Call for information.

**PRODUCT AND SERVICE CATEGORIES WEALTHY CONSUMERS SEARCH WHILE SHOPPING ONLINE, 2009**



NOTE: Wealthy consumers are defined as those in the top 10% of the population in terms of annual household income.

SOURCE: The Luxury Institute

(46% vs. 16%);

- ▶ Designer shoes (24% vs. 15%); and
- ▶ Designer handbags (24% vs. 12%).

Men dominate searches for:

- ▶ Consumer electronics (61% of men vs. 33% of women);
- ▶ Automotive (55% vs. 22%); and
- ▶ Household appliances (42% vs. 29%).

**SOURCE:** "WealthSurvey," The Luxury Institute, Martin Swanson, VP, 115 E. 57th St., 11th Fl., New York, NY 10022; 914-909-6350; mswanson@luxuryinstitute.com; www.luxuryinstitute.com. Price: Call for information.

## Affluents Shop Online For Travel, Clothing, And Home Entertainment

Nine in 10 affluent Americans (90%) have used a computer, mobile device, or cell phone to make a purchase online, notes Ipsos Mendelsohn. Ipsos Mendelsohn defines affluent households as those with annual incomes of \$100,000 or more. Their most common purchases are travel (70% have made such a purchase), followed by apparel or accessories (56%), computers or home entertainment items (56%), leisure or dining items (48%), books (42%), personal care or wellness (34%), and home-related items (23%).

### ITEMS AFFLUENT AMERICANS HAVE EVER BOUGHT ONLINE, 2010

Airline tickets	57.2%
Hotel/motel/resort reservations	54.1%
Event tickets	42.6%
Books	42.0%
Women's apparel and accessories	41.7%
Men's apparel and accessories	33.3%
Music and video	30.3%
Children's apparel and accessories	29.5%
Computers, electronics, and related equipment	29.3%
Items on auction sites	22.2%
Games	19.3%
Software and applications	17.9%
Housewares	17.0%
Toys	16.6%
Take-out food orders	16.3%
Skincare, cosmetics, and fragrance	14.5%
Automotive maintenance and supplies	13.8%
Personal care products and services	13.6%
Prescription drugs and medicines	12.9%
Financial trades (buy or sell stocks)	12.0%
Sports and athletic equipment	11.6%
Vitamins and other health aids	11.1%
Home appliances	10.4%

NOTE: Affluent Americans are defined as those in households with an annual income of \$100,000 or more.

**SOURCE:** Ipsos Mendelsohn

**SOURCE:** "2010 Mendelsohn Affluent Survey," Ipsos Mendelsohn, Bob Schullman, 841 Broadway, New York, NY 10003; 212-677-8100; bob.schullman@mmsrveys.com; www.mmsrveys.com. Price: Call for information.

## Children Make A Difference In Affluent Women's Habits

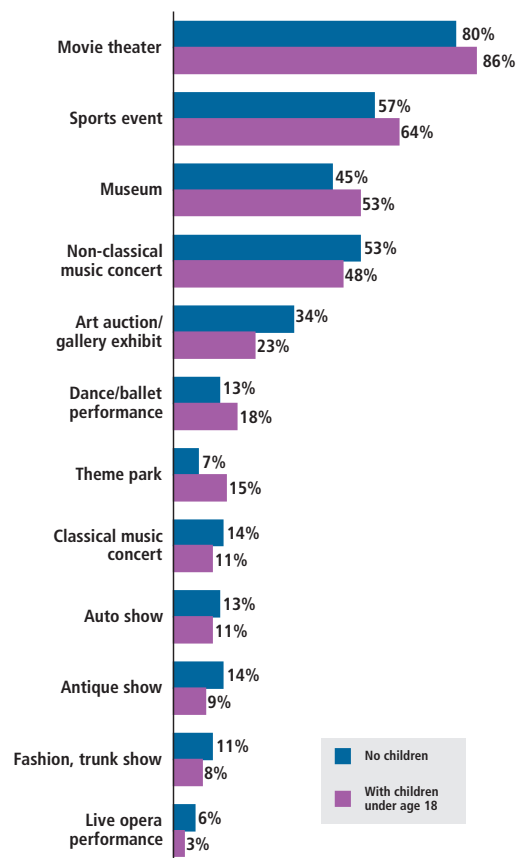
Affluent women age 18-54 — defined as having annual household incomes exceeding \$100,000 a year — engage in typical well-heeled behaviors, such as antiques, redecorating, and traveling. One in three affluent women without children (34%), for instance, attends art auctions or gallery exhibits, compared to 23% of affluent moms, according to Ipsos Mendelsohn and Ipsos OTX.

Adding children to the mix means women give up estate sales for more low-brow activities (if only until their children are grown and leave home). Affluent moms, for example, are more likely than their non-parent counterparts to have recently visited a sporting event (64% vs. 57%) or theme park (15% vs. 7%).

Affluent families are more likely than their less-affluent counterparts to own multiple sets of products. The vast majority of affluent moms have at least two cars and three TV sets.

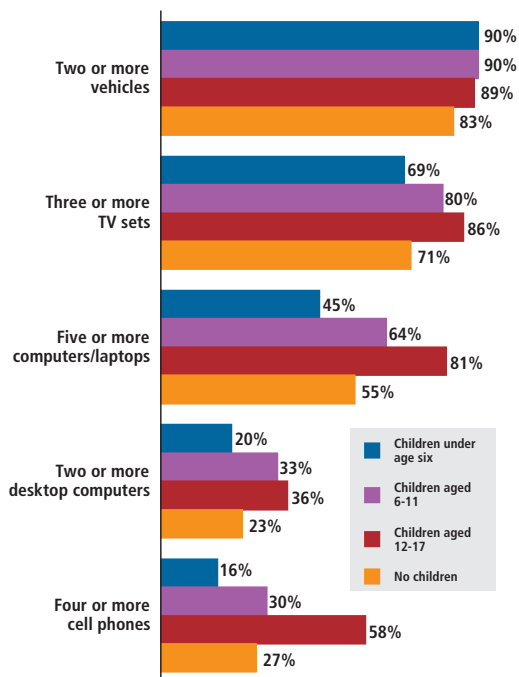
The key time for affluent families multiple purchases occurs during their children's tween years; for example, 20%

### EVENTS ATTENDED BY AFFLUENT WOMEN DURING PAST YEAR, THOSE WITH CHILDREN VS. WITHOUT CHILDREN



**SOURCE:** Ipsos Mendelsohn and Ipsos OTX

MULTIPLE SETS OF ITEMS OWNED BY AFFLUENT HOUSEHOLDS, BY AGE OF CHILDREN, 2010



SOURCE: Ipsos Mendelsohn and Ipsos OTX

of families with kids under six own at least two desktop computers compared with 33% of families with kids 6-11. Similarly, the number of affluent households with at least four cell phones nearly doubles from 16% of households with kids under age six to 30% of households with 6-11-year-olds.

Affluent households feature the latest tech gadgets, with affluent moms using them to save time. For instance, 42% of moms with children under age six always fast-forward through commercials, compared to 34% of affluent women without children.

Affluent moms with children also are more avid Web users, being more likely than non-moms to maintain a profile on a social networking site (42% vs. 33%), find coupons online (42% vs. 37%), and play games online (48% vs. 44%).

SOURCE: "Affluent Mothers Of Young Children," Ipsos OTX, Donna Sabino, SVP Kids and Family Insights, 212-524-8242; dsabino@otxresearch.com; www.ipsos-na.com. Price: Call for information.

## Affluent Americans Continue To Cut Back Due To Economic Uncertainty

More than four in 10 affluent Americans (41%) — defined as those who have a minimum net worth of \$800,000 — are making a conscious effort to spend less in the coming year than they did in the prior year, according to the American Affluence Research Center. The primary reason they are choosing to cut back (or to continue cutting back) is

because they are uncertain about when the economy will recover. Two thirds (65%) report wanting to save more so they plan to spend less, and 60% say they have experienced a decline in savings or investments.

One in 12 affluent households (8%) will remodel their kitchen in the coming two years, and 16% are considering a kitchen remodel but are unsure. Those who are definitely planning a remodel expect to spend an average of \$35,000, and those who are on the fence assume they would spend an average of \$28,000. They would hire a kitchen design specialist to help them source most purchases, and they cite Home Depot more often than Lowe's as a store they would shop.

More than one in 10 (11%) plan to remodel a bathroom in the coming two years, and 19% are considering a bathroom remodel. Those who are definitely planning a remodel expect to spend an average of \$15,000, and those who are unsure if they will remodel assume they would spend an average of \$11,000. Those planning a bathroom remodel also most commonly say they would hire a design specialists, followed by shopping Home Depot and then Lowe's for items needed for their remodel.

About 12% say they will not buy Christmas or Hanukkah presents in 2010, up from 9% in 2009 and compared to 3% who said so prior to the recession. Among those who plan to buy gifts, 3% expect to spend more and 29% expect to spend less. In 2009, their average spending was \$2,399, and their median spending was \$1,160.

SOURCE: "Fall 2010 Affluent Market Tracking Study," American Affluence Research Center, Ron Kurtz, PO Box 978, Alpharetta, GA 30004; 770-740-2200; kurtzgroup@comcast.net; www.affluenceresearch.org. Price: \$395 for the basic report; \$595 for full cross-tabulated data.

## factoids

- ▶ Most **wealthy** Americans (88%) — defined as those with at least \$500,000 in investable assets — say that it is more important than ever to live within their means; some have experienced negative affects on their household budget (42%) and lifestyle (34%) during the recession. (*PNC Wealth Management; phone: 412-768-3711*)

### FAST FACTS

#### Affluent Shoppers

- ▶ 62% of affluent Americans — defined as the top 10% of households in terms of annual income — feel more comfortable shopping online if they can call someone directly for assistance.
- ▶ 25% of affluent shoppers have a relationship with a sales associate at a luxury brand.
- ▶ 76% have used a mobile device to compare prices, and 21% have used such a device to look up product information while shopping in a store.

**SOURCE:** The Luxury Institute, Martin Swanson, VP, 115 E. 57th St., 11th Fl., New York, NY 10022; 914-909-6350; mswanson@luxuryinstitute.com; www.luxuryinstitute.com.





# automotive

The top two factors affecting Americans' automotive purchases are price and reliability. Auto shoppers most commonly say they do not care whether their car is foreign- or domestic-made; among those with a preference, they are nearly three times as likely to prefer American vehicles to foreign vehicles.

The year 2010 was the first time used car shoppers were as likely to say they primarily shopped online for their vehicle as at dealerships. Nearly half of new car shoppers plan to buy the same brand as their last vehicle.

New car shoppers are more likely than used car shoppers to say that incentives have an affect on the timing of their purchase and their choice of make and model. Most car shoppers research financing options online, and half seek pre-approval through a bank or credit union before they buy.

While Americans are warming to alternative fuel vehicles, they note that they have both positives and negatives — they save on fuel costs but lack in driving performance. Electric vehicles have their own set of considerations; consumers like that they don't require gasoline, but are concerned about the lack of recharging stations. Those who would consider buying alternative fuel vehicles are slightly more likely to say it is to save on fuel costs than to reduce emissions.

Americans are interested in public transportation equally for the savings on fuel and for the convenience. Only one in 10 drivers say avoiding congestion is the primary reason they would take public transportation, despite the fact that a third of driving trips in urban areas run into congestion. In aggregate, they experienced more than 4 billion hours of traffic delays in 2010!

## Americans' Vehicle & Driving Costs Are One-Seventh Of Their Budget

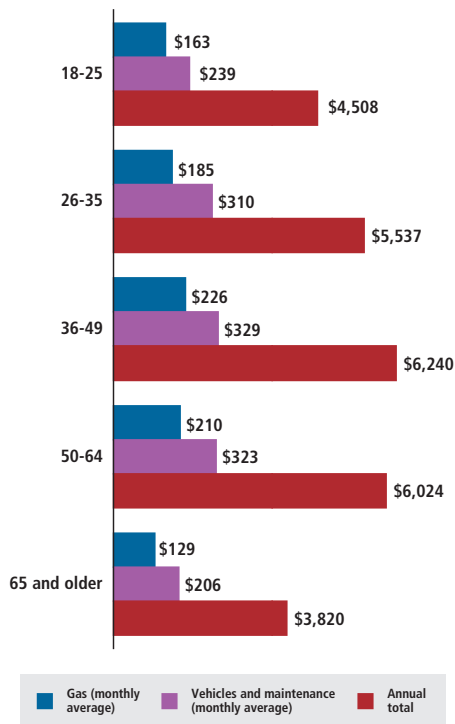
Americans spent an average of \$5,477 on gas and automotive expenses in 2009, according to Bundle. That breaks down to \$3,269 spent on vehicles and maintenance, and \$2,208 spent on gasoline.

Connecticut residents spent the most on transportation — a whopping \$7,652, including \$5,078 on vehicles and maintenance. Oklahomans spent the most on gas (\$2,867). West Virginians spent the least on transportation, an average of \$4,258. Mississippi residents spent the least on vehicles and maintenance (\$2,319), and Hawaiians spent the least on gas (\$1,557).

While Hawaiians tend to have some of the highest costs of living — and therefore have a higher rate of annual spending than other Americans — they spend less on gas because more use public transportation and commute. Similarly, New York City residents spend relatively little on transportation thanks to subways and buses. Hawaiians and New Yorkers have the lowest incidence of traveling to work alone.

The younger the person, the larger portion of their budget they allocate to transportation. Those aged 18-25 spent 18.6% of their budget on transportation, compared to only 11.7% for those aged 65 and older.

AMERICAN SPENDING ON TRANSPORTATION, BY AGE, 2009



SOURCE: Bundle

SOURCE: "How America Spends," Bundle, Jaidev Shergill, Founder, 149 5th Ave., 4th Fl., New York, NY 10010; jaidev@bundle.com; www.bundle.com. Price: Available online at no charge.

## Auto Shoppers Are Undecided On Brand, But Decided On Financing Options

Of those who are in the market to buy a new car, 74% plan to make their purchase within six months, reports Kelley Blue Book. Shoppers are twice as likely to plan to buy a used car (67%) as a new car (33%).

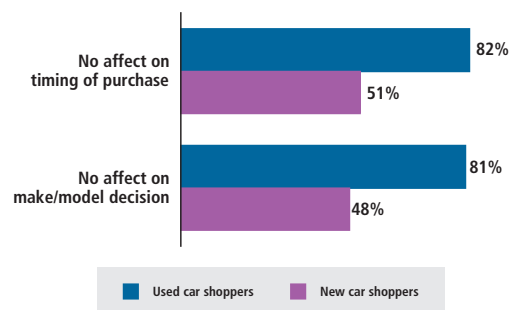
Most shoppers (83%) are undecided as to the make and model of the vehicle they will purchase. Undecided car shoppers younger than age 35 (45%) are more likely than average to be equally open to buying a domestic or foreign brand. Those aged 55 and older are more likely to have made up their mind, with 39% determined to buy an American-made car and 32% decided to buy an import.

Price (cited by 33%) and reliability/quality (also cited by 33%) are the top two factors influencing car shoppers' purchase decisions. They next most often cite past experience with a brand (12%).

Nearly three quarters of used car shoppers (62%) intend to spend \$15,000 or less. Half of new car shoppers (50%) plan to spend \$25,000 or less. Most shoppers (57%) plan to research financing options online, and 50% will seek pre-approval through a bank or credit union before they buy. Of those who are interested in pre-approval, 44% will do so in order to control negotiations, and 34% to get a low interest rate. A third (34%) plan to seek financing from a dealer when they make a purchase. They most commonly seek financing from a dealership because it is convenient (54%) and in order to get a low interest rate (32%).

The most popular loan term is five years, cited by 42%. A 36-month loan was the second most popular option, preferred by 21%.

AFFECT OF INCENTIVES ON AUTOMOTIVE PURCHASES, USED CAR SHOPPERS VS. NEW CAR SHOPPERS, 2010



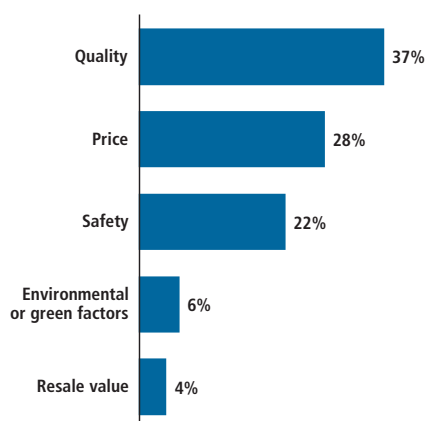
SOURCE: Kelley Blue Book

SOURCE: "Market Intelligence," Kelley Blue Book, James Bell, Executive Market Analyst, 195 Technology Dr., Irvine, CA 92618; 949-770-7704; jbell@kbb.com; www.kbb.com. Price: Available online at no charge.

## Quality Tops Price In Influencing Auto Shoppers' Decisions

Automotive shoppers most commonly say that their purchase decisions are impacted by quality (37%) more than any other factor, according to Ipsos and CarMax. The factors that play a role in shoppers' auto purchases are greatly influenced by annual household income. Those with household incomes of less than \$75,000 are more likely than those with higher incomes to say price (32% vs. 18%) and safety (25% vs. 15%) play the greatest role in their purchase decisions. Those with incomes of \$75,000 or more are more likely than those with lower incomes to say that quality (54% vs. 30%) plays the greatest role in their purchase decisions. Parents are more likely than non-parents (27% vs. 18%) to say safety is the primary factor in their decisions.

FACTOR THAT HAS THE GREATEST EFFECT ON AUTO SHOPPERS' PURCHASE DECISIONS, 2010



SOURCE: Ipsos and CarMax

SOURCE: "Quality Greatest Factor In Americans' Car Buying Decisions," Ipsos, Rebecca Sizelove, Sr. Research Manager, 1700 Broadway, 15th Fl., New York, NY 10019; 212-584-9253; rebecca.sizelove@ipsos.com; www.ipsos.com. Price: Call for information.

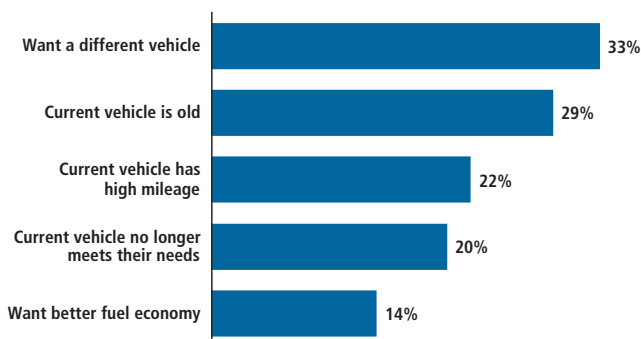
## Half Of New Vehicle Shoppers Delay Purchase

A slight majority of those shopping for a new vehicle (52%) delayed their purchase in the prior year, according to Kelley Blue Book. Some 41% have delayed their purchase by seven months or more, and another 36% delayed their purchase by four to six months.

The reasons they delay their purchase include:

- ▶ Waiting to find the right deal before making their final purchase decision (72%);
- ▶ Being undecided on the specific vehicle they wanted to purchase (43%);

PRIMARY REASON SHOPPERS PLAN TO PURCHASE A NEW VEHICLE, 2010



SOURCE: Kelley Blue Book

SOURCE: "Consumer Sentiment Study," Kelley Blue Book Market Intelligence, James Bell, Executive Market Analyst, 195 Technology Dr., Irvine, CA 92618; 949-770-7704; jbell@kbb.com; www.kbb.com. Price: Available online at no charge.

## Used Car Buyers Go Online, New Car Buyers Stick With Their Brand

The proportion of used car shoppers who primarily searched for their next vehicle online grew to 46% in 2009, up from 40% the year prior, according to J.D. Power and Associates.

This represents the first time that the proportion that primarily searches for used cars online equaled the proportion that primarily searched at a dealership (46%). In addition, 31% of those who bought found their vehicle online, compared to 28% who found their next car at a dealership.

Overall, more than nine in 10 used car shoppers (91%) visited at least one third-party website while shopping for their next vehicle, compared to 78% who visited a dealer website.

Six in 10 (60%) plan to purchase a certified pre-owned vehicle. Those who do are slightly more likely than average to shop for their next car on a website (50%) than a dealer lot (45%). The proportion that visit a dealer website specifically to look for certified pre-owned vehicles grew to 29%, up from 19% in 2008.

Nearly half of new car shoppers (48%) choose to purchase the same brand as their last vehicle. Shoppers are concerned with the future of their investment: among their top considerations when buying a new car are resale value (which increased 12 percentage points year over year) and quality (which increased six percentage points).

The brands that have the highest customer retention rates are:

- ▶ Mercedes Benz (66%, up from 59% in 2008);
- ▶ Honda (64%, slightly down from 65%); and
- ▶ Toyota (61%, down slightly from 63%).

Those with the lowest retention rates are:

- ▶ SAAB (10%, down from 31%, which is likely related to

rumors the automaker was going out of business);

- ▶ Suzuki (22%, down from 41%); and
- ▶ Mitsubishi (24%, down from 28%).

**SOURCE:** "2009 Used Vehicle Market Report" and "2009 Customer Retention Study," J.D. Power And Associates, Syvetril Perryman, Specialist, 2625 Townsgate Rd., #100, Westlake Village, CA 91361; 805-418-8103; syvetril.perryman@jdpa.com; www.jdpa.com. Price: Call for information.

## Americans Continue To Support Domestic Auto Makers

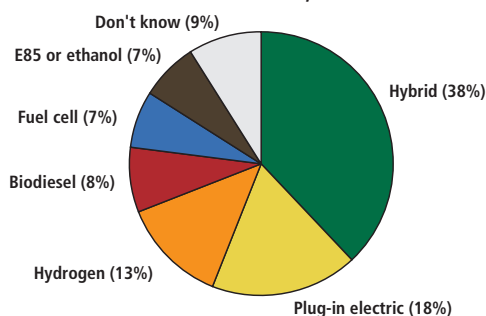
More than eight in 10 households in the U.S. (83%) have at least one owned or leased vehicle, and 29% have three or more vehicles, according to the Associated Press and GfK. Most vehicle households (56%) have a domestic make, primarily GM/Chevrolet (21%), Ford (19%), or Daimler Chrysler (6%). Nearly four in 10 (37%) have a foreign make, with most being Toyota (11%), Honda (9%), or Nissan (5%).

Nearly half of Americans (45%) are unconcerned whether their vehicle is a domestic or foreign make, though 40% prefer to buy American-made, compared to 13% who prefer foreign-made. Those who prefer foreign cars do so for reasons ranging from less maintenance and fewer mechanical problems (51%) to better quality (43%). One in five (20%) believe they last longer.

The average primary household vehicle was acquired four years ago. The vast majority (94%) were purchased rather than leased, and 58% were bought used. While 95% of households are satisfied with their vehicles, fewer (85%) would buy another vehicle from the same company.

Nearly one in five households (19%) claim they are likely to purchase or lease a new vehicle in the coming six months. Most (61%) would consider buying one that runs on alternative fuel, though their reasons are not entirely altruistic: 40% of those are concerned about a car's environmental impact, while 43% are merely trying to save money on gas. The remaining 16% say both the environment and finance factor equally into their purchase decision.

ALTERNATIVE FUEL VEHICLES AMERICANS ARE MOST INTERESTED IN PURCHASING, 2010



**SOURCE:** Associated Press and GfK Roper

**SOURCE:** "Vehicle Poll," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; info@ap-gfcpoll.com; www.ap-gfcpoll.com. Price: Available online at no charge.

## Positives And Negatives Of Electric Vehicles

Only a third of adults (32%) are familiar with hybrid vehicles, and fewer (25%) are familiar with electric-powered vehicles, says the Consumer Electronics Association. Those who would consider purchasing an electric vehicle cite the greatest benefits as:

- ▶ Being able to run without gasoline (78%);
  - ▶ Less pollution from driving (67%); and
  - ▶ Lack of need for oil changes and tune-ups (60%).
- They cite the greatest detractors as:
- ▶ Fear of running out of power on the road (71%);
  - ▶ Lack of charging stations or not being able to recharge (66%); and
  - ▶ Limited mileage (59%).

In addition, 51% would be less likely to consider buying an electric car if they had to install special charging equipment in their garage.

**SOURCE:** "Electric Vehicles: The Future of Driving," Consumer Electronics Association, Chris Ely, Manager Industry Analysis, 1919 S. Eads St., Arlington, VA 22202; 703-907-5241; cely@ce.org; www.ce.org. Price: Free for members, \$699 for non-members.

## Money Drives Them Crazy: Gen Y Auto Shoppers Don't Want To Talk Price

More than four in 10 Gen Yers (42%) expect to be driving the same brand of vehicle five years in the future as they are currently, up from 27% who said so in 2008, reports Deloitte. When they shop for a vehicle, 69% would like to be able to test drive it for 24 hours. Nearly two thirds (64%) are more interested in buying a used car than a new car.

Factors most affecting their purchase decision are gas mileage (12%), price/affordability (7%), and exterior styling (6%).

Money makes Gen Y auto shoppers nervous:

- ▶ 62% would prefer not to haggle over price,
- ▶ 85% would prefer to know the price up front, and
- ▶ 61% would like to skip negotiations altogether.

The environment plays a role in their vehicle purchase decision:

- ▶ 73% claim the environment is an "extremely important" factor in their choice of what vehicle to purchase,
- ▶ 64% would be willing to pay more for an eco-friendly car that also saves money on energy costs, but 44% would *not* buy an eco-friendly car if it did not also save them money, and
- ▶ 49% believe the type of car they drive makes a concrete difference in addressing global and local concerns about the environment.

Despite their interest in the environment, the proportion of Gen Yers who expect to be driving an SUV five years in the future rose to 23%, up from 11% in 2008, while those who expect to drive a hybrid dropped to 11%, down from 21%.

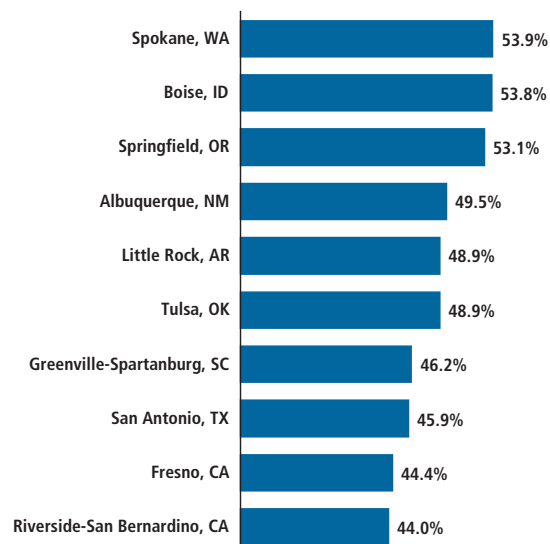
**SOURCE:** "Connecting With Gen Y: Making The Short List," Deloitte, Michelle Collins, U.S. Auto Sector Leader, 350 S. Grand Ave., Los Angeles, CA 90071; 313-396-3219; micollins@deloitte.com; www.deloitte.com/us/genyconnection.

## Kings Of The Road: Pickup Sales Grow, Truckers Love The Radio

More than a quarter of Americans (27.7%) own a pickup truck, reports The Media Audit. That number is growing, as truck sales account for 11.5% of automotive sales, up from 10% in the prior year.

Truck owners spend an average of 2 hours, 51 minutes per day listening to radio, 10% higher than the national average. They also spend 63 minutes exposed to outdoor advertising, compared to 53 minutes for the average adult.

**MARKETS WITH THE HIGHEST RATE OF TRUCK OWNERSHIP IN THE U.S., 2010**



**SOURCE:** The Media Audit

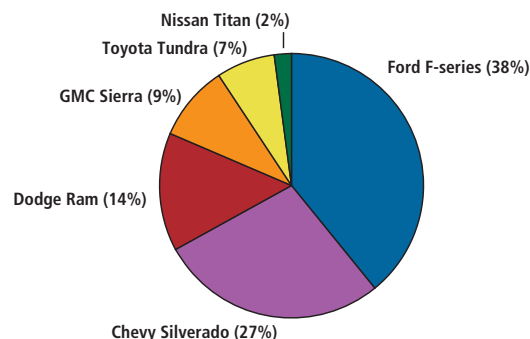
**SOURCE:** "National Report: Automotive Trends," The Media Audit, Robert Jordan, President, 10333 Richmond Ave., #200, Houston, TX 77042; 800-324-9921; rjordan@themediiaaudit.com; www.themediiaaudit.com. Price: Call for information.

## Pickup Truck Sales Are Projected To Pick Up

Pickup truck sales will account for an 11.4% share of the automotive market in 2010, predicts Edmunds. That represents a continuing decline for the segment, which peaked in 2005 with a 15% share.

However, Edmunds expect that trend to reverse and that the segment will regain share between 2010 and 2014. The number of pickup truck owners who purchase another pickup following trade in has climbed to 73%. Between 2006 and 2009, that proportion hovered around 67%.

**SHARE OF PICKUP TRUCK SALES, BY MAKE AND MODEL, 2010**



**SOURCE:** Edmunds

Ford's F-series pickups dominate the market, growing to a 38% share in 2010, up from 30% in 2008. Meanwhile, GM's combined share from sales of its Silverado and Sierra makes has fallen to 36% from 40% over the same period.

**SOURCE:** "Future Vehicles," Edmunds, Jeannine Fallon, Communications, 2401 Colorado Ave., #250, Santa Monica, CA 90404; 310-309-6300; jfallon@edmunds.com; www.edmunds.com.

## Californians Are Most Likely To Own Japanese-Brand Vehicles

California residents represent a whopping 22% of owners of Japanese-brand automobiles, according to The Media Audit. A majority of Japanese-brand vehicle owners are between the ages of 18-49. Also, those with household incomes of \$100,000 or more are 27% more likely than average to be the owner of a Japanese-brand vehicle.

The metropolitan areas with the greatest proportion of owners of Japanese-made vehicles are:

- ▶ San Jose, CA (68%);
- ▶ Orange County, CA (64%);
- ▶ Washington, DC (64%);
- ▶ Los Angeles, CA (64%);
- ▶ San Diego, CA (62%);
- ▶ San Francisco, CA (61%);
- ▶ Sacramento, CA (60%);
- ▶ Seattle-Tacoma, WA (60%);
- ▶ Raleigh-Durham, NC (59%); and
- ▶ Riverside-San Bernardino, CA (59%).

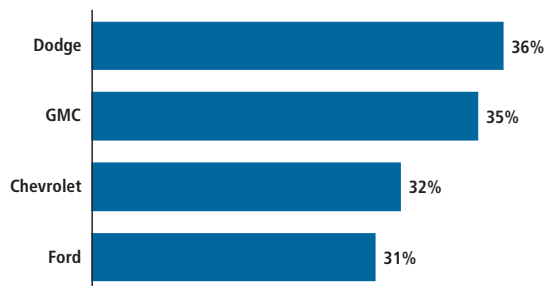
**SOURCE:** "National Report," The Media Audit, Robert Jordan, President, 10333 Richmond Ave., #200, Houston, TX 77042; 800-324-9921; rjordan@themediiaaudit.com; www.themediiaaudit.com. Price: Call for information.

## Auto Shoppers Are Influenced By Motor Sports

A quarter of Americans in the market to buy a new vehicle (25%) watch at least one motor sports race on TV, according to Foresight Research. Among those who watch races, 40% watch 10 or more a year. In addition, 10% of in-

market shoppers attend at least one race a year. Those who buy large cars, sports cars, and pickup trucks are more likely than average to be influenced by motor sports.

**FAVORITE BRANDS OF NEW VEHICLE BUYERS WHO WATCH MOTOR SPORTS ON TV, 2010**



**SOURCE:** Foresight Research

**SOURCE:** "2010: Automotive Marketing Return On Investment," Foresight Research, Ron Hein, EVP, 640 W. University Dr., Rochester, MI 48307; 248-608-1870, x18; ronh@foresightresearch.com; www.foresightresearch.com. Price: \$4,400.

## Stuck In Drive: Sluggish Traffic In Urban Areas Costs U.S.

Traffic congestion costs Americans \$87.2 billion per year in wasted time and fuel. A third of car trips in the 439 urban areas of the U.S. were affected by congestion in 2007 — the most recent year for which data are available — according to the most recent data from the Texas Transportation Institute. The total delay Americans experienced on roadways in 2007 amounts to 4.2 billion hours, up from 0.8 billion hours in 1982. That averages out to 36.1 hours of delay per traveler, up from 14 hours over the same period. They wasted 24 gallons of fuel, up from nine gallons.

Americans traveled an average of 12.7 miles each day. Only 45% of their travel time was on uncongested roads, down from 72% in 1982. In urban areas with a population of more than 1 million, 31% of travel time was uncongested.

Not surprisingly, traffic congestion is worse in larger urban areas. Los Angeles/Long Beach/Santa Ana, CA, ranks number one, with drivers wasting an average of 70 hours and 53 gallons of gas per year. However, even in the smallest urban areas, drivers waste an average of 18 hours and 10 gallons of fuel per year.

**AVERAGE TIME AND GAS WASTED BY A DRIVER IN TRAFFIC CONGESTION, BY SIZE OF URBAN AREA, 2007**

	Hours	Gallons of gas
More than 3 million	51	35
1 million to 3 million	35	24
250,000 to 1 million	24	15
Less than 250,000	18	10

**SOURCE:** Texas Transportation Institute

**SOURCE:** "2009 Urban Mobility Report," Texas Transportation Institute, David Schrank, Associate Research Scientist, 3135 TAMU College Station, TX 77843; 979-845-7323; d-schrank@tamu.edu; tti.tamu.edu. Price: Available online at no charge.

## A Marriage Between Car And Driver

For men, the "honeymoon period" with their car — before they engaged in risky behavior such as parking near other cars or hauling around dirty sports equipment — lasts an average of four months, according to LeaseTrader.com. For women, the honeymoon lasts 14 months before they allow their spouse to drive their vehicle or carpool other people's children.

Drivers of leased vehicles have a shorter honeymoon period than those who purchased their new vehicles.

**BEHAVIORS THAT SIGNIFY THE 'HONEYMOON PERIOD' IS OVER WITH A NEW VEHICLE, MEN VS. WOMEN, 2010**

MEN	
Parks near other cars	.33%
Transports sports equipment	.22%
Cleans car less frequently	.17%
High payments begin to bother them	.12%
Stops using gas mileage button	.7%
No longer fights over who drives on long trips	.3%
Other	.6%
WOMEN	
Lets spouse finally drive the car	.39%
Begins carpooling others' children	.24%
Begins eating in the car	.12%
Puts on makeup while driving	.9%
Leaves clothes in the car	.6%
Smokes in the car	.2%
Other	.8%

**SOURCE:** LeaseTrader.com

**SOURCE:** "Automotive Honeymoon Stage," LeaseTrader.com, Sergio Stiberan, CEO, 1835 E. Hallandale Blvd., #431, Hallandale, FL 33009; 305-677-5070; info@leasetrader.com; www.leasetrader.com.

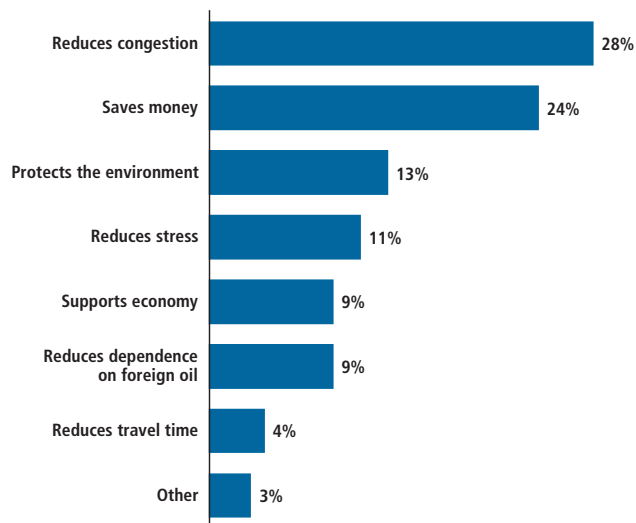
## Americans' Attitudes Toward Public Transit

Nearly seven in 10 Americans (69%) say there are times when public transportation is more convenient than driving, according to HNTB, an engineering, architecture, and planning service. The greatest motivators for them to use public transportation are:

- ▶ High gas prices (29%);
- ▶ Convenience (29%);
- ▶ Avoiding traffic (10%);
- ▶ Environmental concerns (8%);
- ▶ Relaxing while traveling or getting things done (7%);
- ▶ Safer (4%);
- ▶ Because other people are using public transportation (1%).

Of those who have public transportation in the area where they live, 68% say that the quality of transportation has stayed the same or improved over the prior five years. Nearly half (46%) say local, state, and federal governments spend too little on public transportation, compared to only 11% who think government spending is too high.

**MOST VALUABLE ASPECT OF PUBLIC TRANSPORTATION, 2010**



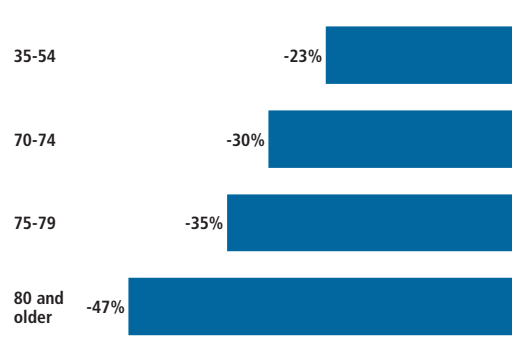
SOURCE: HNTB

SOURCE: "America Thinks 2010 Transit Survey," HNTB, John O'Connell, 715 Kirk Dr., Kansas City, MO 64105; 816-527-2383; joconnell@hntb.com; www.hntb.com.

## Older Drivers Keep Licenses, Improve Safety

Most Americans aged 70 and older (78%) retained their driver licenses in 2008, up from 73% in 1997, according to the most recent data from the Insurance Institute for Highway Safety. Over that period, fatal crashes involving drivers aged 70 and older declined by 37%. In addition, analysis of

**RATE OF CHANGE IN FATAL CRASHES AMONG DRIVERS BETWEEN 1997 AND 2008, BY AGE**



SOURCE: Insurance Institute for Highway Safety

crashes between 1997 and 2005 show that all types of collisions — from those that resulted in property damage to those that involved serious injury or fatality — declined more among those aged 70 and older (down 17%) than among those aged 35-54 (down 5%). Older drivers are also more likely to survive a crash. In 1997, they were 3.5 times as likely as a driver aged 35-54 to sustain a fatal injury in a crash. By 2005, that ratio fell to 3.0.

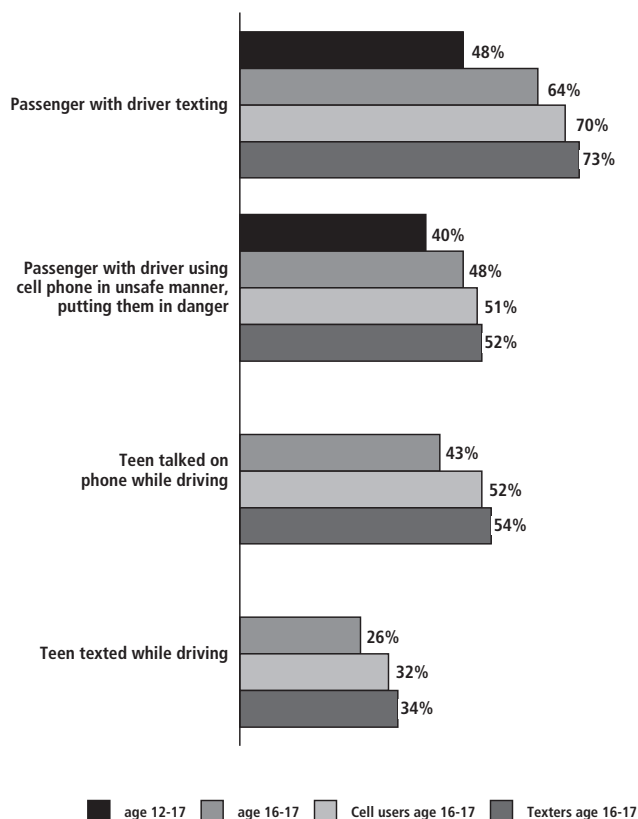
SOURCE: "Recent Trends In Older Driver Crashes," Insurance Institute for Highway Safety, Insurance Institute For Highway Safety (Highway Loss Data Institute), Adrian Lund, President, 1005 N. Glebe Rd., Arlington, VA 22201; 703-247-1500; publications@ihs.org; www.ihs.org.

## Teens' Are Frequently Distracted Drivers

More than half of teens aged 16-17 who own cell phones have talked on their phone while driving, according to the Pew Internet & American Life Project. One in four (26%) 16-17 year olds have texted while driving. Furthermore, half (48%) have been in a car when the driver was texting.

Older teens aged 14-17 are more likely than younger ones aged 12-13 to have been in a car with a driver who used a cell phone in a dangerous way (42% vs. 34%).

**TEENS ON DISTRACTED DRIVING BEHAVIORS**



SOURCE: Pew Internet & American Life Project

**SOURCE:** Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

**SOURCES:** Liberty Mutual Group, Dave Melton, Director Transportation Technical Consulting Services, 175 Berkeley St., Boston, MA 02116; 617-357-9500; www.libertymutualgroup.com.

Students Against Destructive Decisions, Karen Andrasko, 255 Main St., Marlborough, MA 01752; 877-7233-462; kandrasko@sadd.org; www.sadd.org.

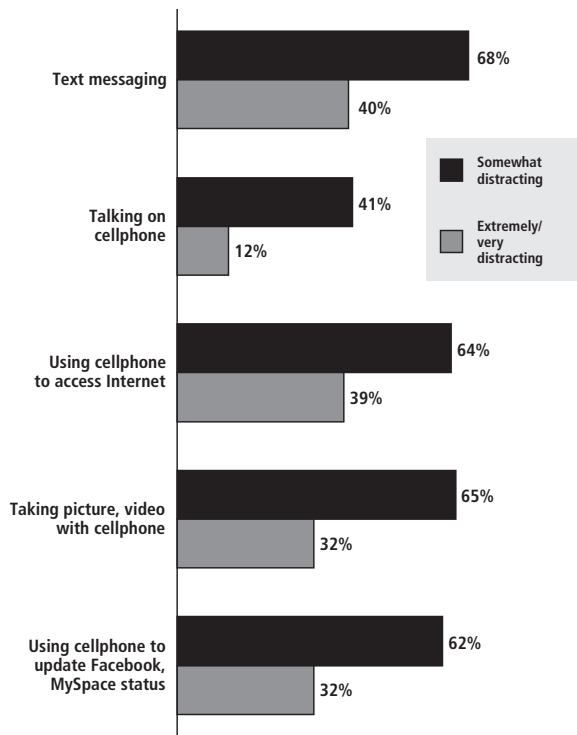
## Teens Still Engage In Cellphone Distractions While Driving, But Stop If Passenger Objects

More than half of teens (56%) admit to texting at least “sometimes” and two in three (64%) talk on their cellphones while driving, with 28% doing it often, according to Liberty Mutual and Students Against Destructive Decisions (SADD). One in four (26%) sometimes uses the phone to take pictures or videos while driving, 18% have gone online, and 15% have updated their Facebook or MySpace status through their phones while behind the wheel.

Although they engage in these behaviors, most are willing to stop if asked. Eight in 10 (81%) would stop texting, 86% would stop taking pictures or video, 87% would not access the Internet, and 71% would stop talking if asked by a passenger.

However, they apparently are shy about asking their friends to put down the phone. Less than half of teens (46%) would ask a driver to stop texting and only 18% would ask a driver to stop talking on their cellphone.

TOP DISTRACTIONS FOR TEEN DRIVERS



**SOURCES:** Liberty Mutual, Students Against Destructive Decisions



## factoids

- ▶ If consumers had to replace their **primary vehicle** in January 2010, 12% would choose a small car, compared to 26% who would select an SUV; in January 2009, 24% would have chosen a small car and 16% an SUV. (*Source: AutoPacific; phone: 714-838-8735*)
- ▶ The **average cost of owning and operating** a four-wheel drive SUV is \$0.74 per mile, factoring in the cost of gas, insurance, and vehicle maintenance; \$0.70 per mile for large sedans, \$0.62 for minivans, \$0.56 for medium sedans, and \$0.43 for small sedans. (*AAA; phone: 407-444-8003*)
- ▶ Nearly a quarter of women (24.0%) and 18.1% of men would fail their **driver's license test** if they had to take it again; and men may be better drivers than women, scoring an average of 78.1% vs. 74.4% for women. (*GMAC Insurance; phone: 770-677-5281*)
- ▶ Americans' interest in adding an eco-drive assistant — which helps drivers use their traditional **gasoline engines** more efficiently — to their vehicles nearly doubled between 2009 (11%) and 2010 (19%). (*Harris Interactive; phone: 212-539-9600*)
- ▶ Some 55% of **vehicle owners** are driving on at least one under-inflated tire, and 17% have four under-inflated tires. (*Rubber Manufacturers Association; phone: 202-682-4846*)
- ▶ Nearly half of adults (47%) have sent a **text message** while driving, compared to 34% of teens aged 16-17. (*Pew Internet & American Life Study; phone: 212-419-4500*)
- ▶ **Men do more driving** than women in a typical week, traversing an average of 215 miles, compared to an average of 157 miles for women. (*The Media Audit; phone: 800-324-9921*)
- ▶ Nearly four in 10 parents (38%) admit to getting lost while **driving** because they were attending to their baby at the same time, 38% miss a highway exit once in a while for the same reason, and 12% miss their exit often. (*Evenflo; phone: 937-415-3300*)
- ▶ One in 10 Americans in the market to buy a new vehicle attended a **motorsports race** in 2009, and 63% of those pre-planned their visits to include vehicle brand displays at the track. (*Foresight Research; phone: 248-608-1870*)
- ▶ Nearly a quarter of drivers in the market for a **new car** who currently own an Acura (23%) or a Lincoln (23%) are considering their brand's non-luxury parent (Honda and Ford, respectively). (*Kelley Blue Book; phone: 949-268-3049*)

### FAST FACT

#### NYC Traffic

- ▶ Some 682,000 cars, 116,000 taxis, and 70,000 trucks travel New York City daily, at an average speed of eight miles per hour.

**SOURCE:** Charles Komanoff, Traffic Analyst; kea@igc.org.

- ▶ Nearly half of drivers (48%) are interested in purchasing an **alternative fuel vehicle** — such as a hybrid, electric, or fuel cell car — but do not know which type to get based on how and where they drive. (*Mercedes-Benz; phone: 201-573-6893*)
- ▶ A majority of Americans believe that using a **cell phone while driving** to send a text (88%), read a text (80%), make a phone call without using a hands-free device (71%), and search for directions (63%) should be banned. (*BIGresearch; phone: 614-846-0146*)



## boomers +

The oldest Baby Boomers are becoming senior citizens, turning 65 in 2011. Older Americans do not consider themselves as entering the final years of their lives as they age; rather they think they have much to look forward to. Baby Boomers are not like the older Americans who have gone before them — they are more physically active, even as they enter retirement.

Boomers are more likely than younger Americans to take a negative view of the economy following the recession. They are more likely than average to say they are cutting spending, trading down, and buying in bulk. They seek deals when they shop. They go to the store with a list, but can be swayed by low prices to buy non-list items or switch brands. Despite their frugal attitudes, Boomers are more likely to be concerned about their jobs and their health than about personal finances.

Baby Boomers' lives are in transition; younger Boomers have had a change in their career or financial situation during the past year, whereas older Boomers are becoming grandparents and leaving their careers to set up retirement households.

Older Americans' favorite activities are entertaining and visiting friends and engaging in leisure activities. They also enjoy traveling and find that they have more free time now that they spend less time dealing with household chores.

Boomers are having less sex than they did a decade ago, but half of older adults say that an active sex life is important to them and to a good relationship.

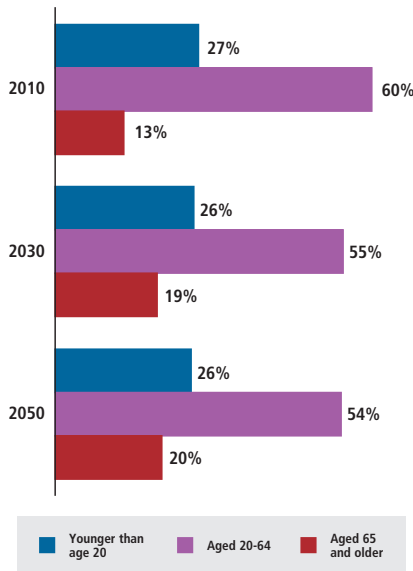
## Aging Americans: The 65-Plus Population Is Growing Rapidly

Between 2010 and 2050, the U.S. population aged 65 and older will change significantly and have a substantial effect on the country, according to the U.S. Census Bureau. By 2030, all of the Baby Boomer generation will be senior citizens, aged 65 or older, a time when Americans typically stop working and start enjoying retirement.

The growing older population affects dependency ratios. The ratio is figured by the proportion of non-working aged Americans (those under age 20 and over age 65) divided by the number aged 20-64, times 100. In 2010, 67 people are dependent for every 100 working-age Americans — 45 aged 20 and under and 22 aged 65 and older for every 100 Americans of working age. By 2050, the dependency ratio grows to 85 for every 100 working-age Americans: 48 aged 20 and under, plus 37 aged 65 and older for every 100 of working age.

The older population is also changing in composition. In 2010, 90% are White, but that number will drop to 81% in 2050. The proportion of Blacks aged 65 and older will rise to 10%, up from 7% in 2010. The Hispanic senior population will nearly triple, growing to 20% from 7%. The Asian population will triple to 6%, up from 2%.

AMERICAN POPULATION YOUNGER THAN 20, AGED 20-64, AND OLDER THAN 65, 2010 VS. 2030 VS. 2050



SOURCE: U.S. Census Bureau

SOURCE: "The Older Population In The United States: 2010 to 2050," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

## Aging Baby Boomers Are Still Big Spenders; Marketers Ignore Them At Their Own Peril

As Baby Boomers (born between 1946 and 1964) age, the largest generation in American history may reshape the advertising industry, just as it did the country's cultural landscape in its youth. Marketers have historically shunned the older population because it spent less and its smaller numbers did not make targeting cost-effective.

The Baby Boomer generation is rewriting the rules, however. Boomers' behavior is similar to that of younger generations setting up households — but Boomers are establishing their retirement households, and they have the time and, in many cases, the money to do it just as they like. They differ from their younger counterparts by spending more on travel and leisure.

That is not to say the recession hasn't affected Boomers; some have delayed retirement, some have taken early retirement, and some have moved into smaller homes or cut back on non-essential spending to ensure their money lasts the

### SPENDING SNAPSHOT: AMERICANS AGED 50-65, MARCH 2010

SHOPPING .....	(24.1%)	\$921
General .....		\$618
Clothing, shoes, and accessories .....		\$158
Hobbies .....		\$66
Electronics .....		\$157
Office supplies .....		\$22
HEALTH & FAMILY .....	(21.2%)	\$811
Insurance .....		\$333
School and child care .....		\$131
Healthcare .....		\$130
Charity .....		\$96
Personal care .....		\$67
HOUSE & HOME .....	(16.9%)	\$647
Home improvements .....		\$269
Utilities .....		\$214
Phone .....		\$102
Maintenance .....		\$62
FOOD & DRINK .....	(16.3%)	\$623
Groceries .....		\$356
Dining out .....		\$267
GETTING AROUND .....	(13.9%)	\$533
Automotive expenses .....		\$323
Gas .....		\$210
TRAVEL & LEISURE .....	(7.1%)	\$294
Travel .....		\$184
Entertainment .....		\$56
Cable/satellite .....		\$54
<b>TOTAL MONTHLY SPENDING .....</b>		<b>\$3,829</b>

SOURCE: Bundle.com

**CONSUMER ATTITUDES TOWARD HOMEMADE VS. RESTAURANT FOOD, YOUNGER VS. OLDER, 2010**

	UNDER AGE 50	50 AND OLDER
<b>STEAK</b>		
Good restaurant	4.7	4.5
Buy fresh and grill at home	4.5	4.8
<b>BURGERS</b>		
Good restaurant	4.7	4.8
Buy fresh ingredients and grill at home	4.0	4.8
<b>FISH</b>		
Good restaurant	4.6	4.8
Buy fresh and cook at home	4.4	4.8
<b>SHRIMP</b>		
Good restaurant	4.7	4.5
Buy fresh and cook at home	4.5	4.8
<b>PASTA</b>		
Good restaurant	4.4	4.8
Buy fresh ingredients and cook at home	4.7	4.8

NOTE: Ratings based on a scale of one to five where five is best.

SOURCE: The Consumer Network

rest of their lives. Boomers (40%) are more likely than Gen Xers (28%) and Millennials (25%) to say their economic situation is poor, finds Digital Research and Think Vine. But they are optimistic for the future, with only 16% who believe they will be in a poor financial state in the coming six months. This compares to 8% of Gen Xers and 5% of Millennials.

Boomers are more likely than younger adults to say they are buying less as a result of the recession. They are doing less comparison shopping, compared to Gen Xers and Millennials. Instead, they are trading down and sacrificing quality, a savings tactic that Millennials and Gen Xers have not embraced. Boomers are leading the migration to dollar store shopping, with 44% shopping there more, compared to 28% of Gen Xers and 30% of Millennials. Boomers are also buying more in bulk, as are Gen Xers, while Millennials are not, which suggests this savings tactic may be driven more by household size.

Although Boomers have a less optimistic view of the economy, they exercise their spending power in-store. Nielsen notes that Boomers account for 38.5% of spending on consumer packaged goods. In fact, Boomers spend more than other generations in 1,023 of 1,083 CPG categories. That is despite the researchers' estimation that only 5% of advertising dollars target those aged 35-65 (which includes the Boomer generation).

Like other shoppers, most Boomers go to the store with a shopping list in hand, notes M/A/R/C research. They put more effort into pre-planning their list and reference it casually in store. Boomers see brand and price as more important than do other shopper segments, and they are loyal to their favorite retailers. When composing the list, they are

more influenced than other shoppers by the store ad or circular; they seek their preferred brands, but can be swayed by price. They do not buy many items that are not on their list and are disciplined about impulse shopping. They are also encouraged to buy when a coupon is available.

Boomers spend more than the average shopper per trip at certain types of stores, including:

- ▶ Walmart (+\$45.86);
- ▶ Grocery stores (+\$27.39); and
- ▶ Drug stores (+\$32.71).

Perhaps because they have more time and practice cooking at home (see "Matures Are At Home...," p. 12), Boomers are more likely than their younger counterparts to say that steak, burgers, fish, shrimp, and pasta they prepare at home are just as good — if not better — than what they get at restaurants. Younger and older Americans agree that pizza at home cannot compare to pizzeria made pies, but they also agree that casseroles and stir fries are best at home.

**SOURCES:** "Grocery Shopper Behavior, Q1 2010," Digital Research, Jane Mount, EVP, 201 Lafayette Center, Kennebunk, ME 04043; 207-985-7660, x121; jane.mount@digitalresearch.com; www.digitalresearch.com. Price: Call for information.

The Nielsen Company, Todd Hale, SVP Consumer & Shopping Insights, 770 Broadway, New York, NY 10003-9595; 646-654-5000; www.nielsen.com.

U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov.

"How America Spends," Bundle, Jaidev Shergill, Founder, 149 5th Ave., 4th Fl., New York, NY 10010; jaidev@bundle.com; www.bundle.com. Price: Available online at no charge.

"Shopping Lists," *The Checkout*, Issue 4.10, M/A/R/C Research, Merrill Dubrow, President, 1660 N. Westridge Cir., Irving, TX 75038; 972-983-0416; merill.dubrow@marcresearch.com; www.marcresearch.com. Price: Call for information.

"Talking About Food Quality," The Consumer Network, *The Shopper Report* May 2010, Mona Doyle, PO Box 42753, Philadelphia, PA 19101; 215-235-2400; shopperreport@cs.com. Price: \$99 for a one-year subscription.

## BOOMERS BY THE NUMBERS

Baby Boomers will officially begin to cross into the category of "senior citizens" (aged 65 and older), in 2011, and by 2030, all Baby Boomers will be seniors.

- ▶ In 2008, there were nearly 78 million Baby Boomers, accounting for about a quarter of the American population.
- ▶ In 2030, there will be more than 63 million Baby Boomers accounting for 17% of the population.
- ▶ Women accounted for 51% of Boomers in 2008, and men for 48%; in 2030, that balance will shift to 54% women and 46% men.

**SOURCE:** U.S. Census Bureau

## Older Americans Are Spenders, Remain Active

Americans aged 65 to 80 do not think of themselves as being in their final years, according to Vi, a living community for older Americans. In fact, 82% of 65-80 year olds feel that they have much to look forward to, and 83% feel younger than they actually are. Nearly four in 10 (38%) have never had as much fun as they are having in their older age. A similar proportion (39%) have gotten more adventurous as they have gotten older.

While 72% enjoy the freedom to do whatever they want, and 42% do not miss the responsibility of work, 79% still feel productive in society.

Nearly half (46%) have more free time because they are no longer dealing with household chores. One “chore” they have not given up is cooking, with more than 80% preferring to cook at home over eating frozen or pre-prepared meals.

A majority is filling free time with plans to travel (57%) and to spend time with family (57%). Six in 10 (60%) exercise more than two or three hours a week. Half (50%) also say that having an active sex life is important to them.

One in four (40%) frequently like to treat themselves to new purchases, such as clothes or shoes. Nearly as many (37%) go out socially two or more nights a week. This reflects another sentiment held by older Americans: most are not worried about money. Only 17% are concerned that they will not have enough to get by.

**SOURCE:** “Next Chapter Study,” Vi, Tim Hermeling, 71 S. Wacker Dr., #900, Chicago, IL 60606; 312-803-8480; thermeling@viliving.com; www.viliving.com.

## Life Stages And Stress: Boomers Worry About Health And Work

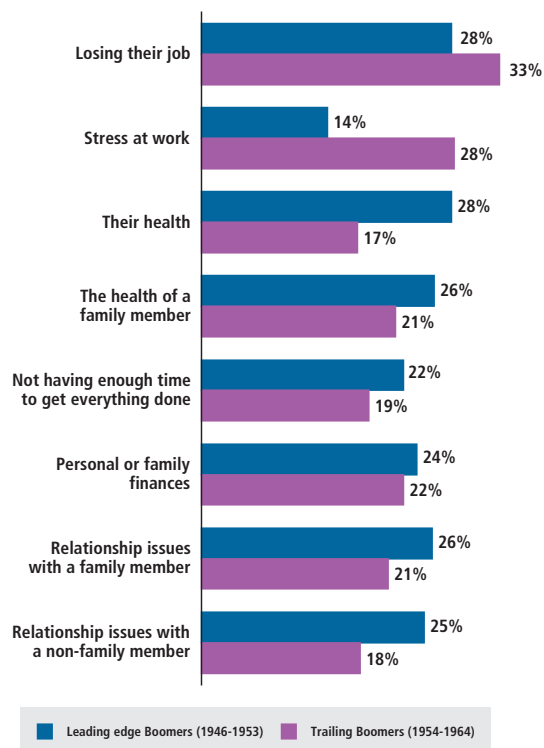
One in five (20%) leading edge Baby Boomers (born between 1946 and 1953) and 22% of trailing Boomers (born between 1954 and 1964) are very stressed or anxious about their lives or current world events, and another 57% and 58%, respectively, are somewhat stressed, according to Continuum Crew. However, their sources of stress are very different based on their life stages. Younger Boomers are more likely to cite their jobs as a source of anxiety, while older Boomers note health concerns.

Change is also a source of stress, and Baby Boomers’ lives are in transition. In the prior three years, younger Boomers are more likely to have:

- ▶ Experienced a major change in their financial situation (40% vs. 29% of older Boomers);
- ▶ Lost their job (24% vs. 18% of older Boomers)
- ▶ Had an adult child move back home (15% vs. 5%); and
- ▶ Watched their youngest child leave the nest (11% vs. 8%).

Older Boomers are experiencing other life changes. They have:

**SOURCES OF STRESS IN BABY BOOMERS’ LIVES, LEADING EDGE BOOMERS VS. TRAILING BOOMERS, 2010**



**SOURCE:** Continuum Crew

- ▶ Become grandparents (23% vs. 13% of younger Boomers);
- ▶ Retired (20% vs. 5%); and
- ▶ Had a life-threatening illness (14% vs. 11%).

**SOURCE:** “Economic Impact Study Follow-Up,” Continuum Crew, Lori Bitter, President, 111 Maiden Ln., #540, San Francisco, CA 94108; 415-295-4575; lori.bitter@continuumcrew.com; www.continuumcrew.com. Price: Call for information.

## Social Butterflies: Older Americans Engage In A Variety Of Activities

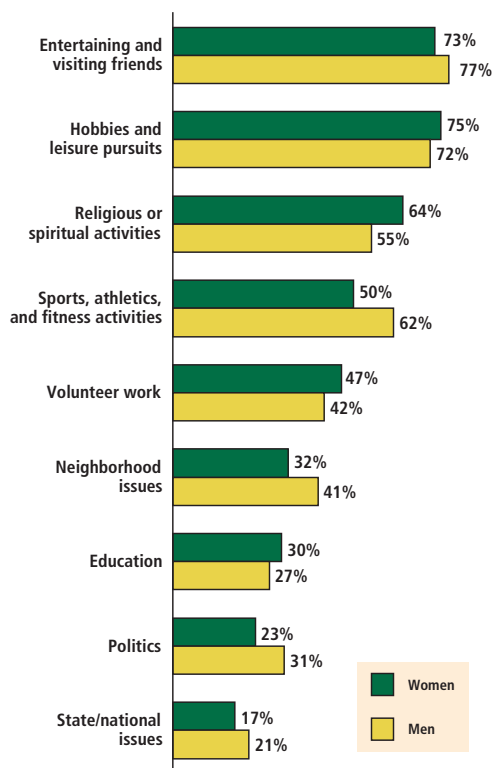
Americans aged 45 and older are involved in social activities, though not to the degree that are Gen Xers (the most active generation), according to the AARP. The top social activities among those aged 45 and older include:

- ▶ Entertaining and visiting friends (75%);
- ▶ Hobbies and leisure pursuits (73%);
- ▶ Religious or spiritual activities (60%);
- ▶ Sports, athletics, and fitness activities (56%);
- ▶ Volunteer work (44%);
- ▶ Neighborhood issues (36%);
- ▶ Politics (27%); and
- ▶ State/national issues (19%).

While their level of involvement in most social activities has not varied much since 1997, their involvement in religious activities is down 11 percentage points.

Not surprisingly, social activities vary by gender.

**SOCIAL ACTIVITIES OF AMERICANS AGED 45 AND OLDER, WOMEN VS. MEN, 2009**



SOURCE: AARP

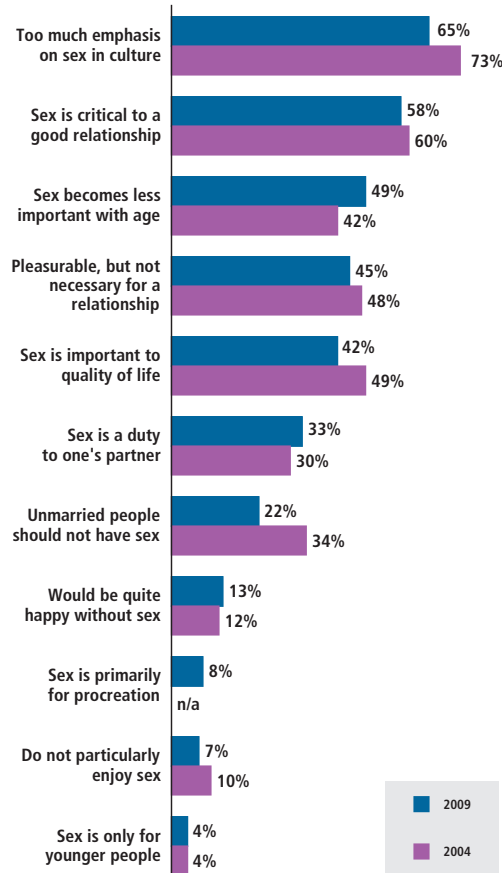
SOURCE: "Connecting and Giving," AARP, Alicia Williams, Analyst, 601 E St. NW, Washington, DC 20049, 202-434-6186; awilliams@aarp.org; www.aarp.org. Price: Available online at no charge.

## Sex Wanes, Attitudes Loosen Up: The Older Adult Perspective

More than a quarter of adults aged 45 and older (28%) had sex at least once a week during the prior six months, down from 38% in 1999, reports AARP. They are also less likely to engage in kissing or hugging (58%, down from 65%) and sexual touching or caressing (44%, down from 55%) compared to 1999. Meanwhile, the proportion that practices self stimulation rose to 22% from 12% over the same period.

Their attitudes toward sex are also changing. Fewer believe that unmarried people should not have sex, and fewer say there is too much emphasis on sex in today's culture.

**ATTITUDES TOWARD SEX, ADULTS AGED 45 AND OLDER, 2009**



SOURCE: AARP

SOURCE: "Sex, Romance, And Relationships," AARP, Linda Fisher, 601 E St. NW, Washington, DC 20049; 202-434-6343; www.aarp.org. Price: Available online at no charge.

## Older Consumers Experience Age Discrimination From Many Sources

Consumers aged 50 and older say they have experienced little age discrimination (average rating of 2.0 on a scale of 1 to 5, where 1 is none and 5 is a lot), according to the Consumer Network. However, they believe that men aged 55 and older experience a moderate amount of age discrimination (3.0) and that women aged 55 and older experience even more (3.7).

Some sales tactics that other shoppers appreciate feel like age discrimination to older shoppers, such as buy one-get one offers that force them to buy (and haul home) more products than they need, small print and dark backgrounds that make signage and labels hard to read, and checkout lines without benches or back relief for shoppers with ailments.

The sectors that shoppers aged 50 and older believe are most discriminatory (on a scale of 1 to 5 with 5 as most discriminatory) are:

- ▶ TV programming (4.2);
- ▶ Health insurance companies or their associates (3.8);
- ▶ Advertising in general (3.7), also specifically cosmetics ads (3.7), department store ads (3.6), food company ads (3.5), and banking ads (3.3);
- ▶ Life insurance companies or their associates (3.4);
- ▶ Supermarkets or their associates (3.3);
- ▶ Plastic surgeons or their associates (3.3);
- ▶ Hospitals or hospital staff (3.2);
- ▶ Drug manufacturers (3.2);
- ▶ Gas station attendants (3.2);
- ▶ Department store associates (3.1);
- ▶ Newspapers (3.0);
- ▶ Banks or their associates (3.0); and
- ▶ Caregivers or nurses (3.0).

**SOURCE:** "Age Discrimination," *The Shopper Report*, September 2010, The Consumer Network, Mona Doyle, PO Box 42753, Philadelphia, PA 19101; 215-235-2400; shopperreport@cs.com. Price: \$99 for a one-year subscription.

## factoids

- ▶ Six in 10 Americans aged 45-65 (60%) **feel five years younger** than they actually are, and 90% of those aged 65 and older feel 10 years younger. (*BeneVia*; phone: 888-855-4442)
- ▶ The vast majority of Americans aged 65 to 80 (86%) want their **retirements** to be active and exciting; just 6% look to their parents' version of retirement as a model for their own. (*Vi*; phone: 312-803-8480)
- ▶ The majority of **retirees** think their children (73%) and grandchildren (76%) will not have as good a career or lifestyle as they were able to have, and most think their children (52%) and grandchildren (62%) will never be able to live the "American dream." (*ProtectSeniors.org*; phone: 202-434-8193)



# business

Business owners were not only dealing with a down economy in 2010, they were also dealing with increasing demands from consumers for transparency in their business practices.

Consumers are skeptical of businesses that tout their environmental and cause-related activities because they fear they are only getting half of the story; they assume businesses hide the negative aspects of their operations. Their skepticism may be driven by confusion — for example, most consumers say they don't understand the messages companies share about their environmental commitments.

Consumers want to get involved with businesses' social responsibility projects by contributing ideas and answering surveys about what is important to them. They show their approval through loyal spending with businesses that get it right, and they boycott those that get it wrong.

Blacks and Hispanics in particular reward businesses that get involved with causes that matter to them. They are loyal to companies that show genuine interest in their local communities.

Despite the challenges they faced, small business owners remained positive about their recovery from the recession. Many planned increases in staffing, marketing, and sales budgets. Blacks, Hispanics, and Asians flexed their entrepreneurial spirit in recent years, with the number of emerging-majority owned businesses growing by nearly 50%.

## Businesses Are Keeping It In The Family

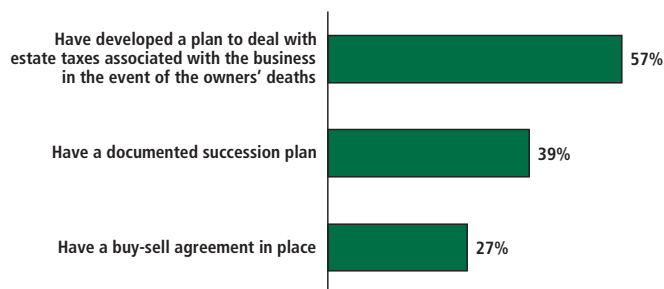
Owners of family businesses say that the benefits of starting and running their company are:

- ▶ Being their own boss (75%);
- ▶ Working for themselves and their families (69%);
- ▶ Sharing their desire to succeed with others (65%); and
- ▶ Flexibility of schedule (61%), finds MassMutual.

The situation isn't entirely rosy, however. More than four in 10 (44%) say they experience more stress, 39% have less time off, and 32% have family disagreements.

Family business owners say their spouses are the most trusted person involved in their business, but they are not the most trusted source for business advice. That would be accountants (55%), followed by lawyers (43%) and spouses (43%).

### FAMILY OWNED BUSINESSES PLANS FOR SUCCESSION, 2009



SOURCE: MassMutual

SOURCE: "FamilyPreneurship Survey," MassMutual, Karen Lavarriere-Sanchez, 1295 State St., Springfield, MA 01111; 413-744-7660; klavarieresanchez@massmutual.com; www.massmutual.com.

## Small Business Owners Economically Optimistic

About half of U.S. small business owners (51%) say their companies have already recovered or will recover from the recession by the end of 2010, finds FedEx Office. That's compared to 54% who were very concerned about the impact of the down economy on their business in 2009. Their newfound optimism shows as twice as many business owners plan to increase their budget for staffing and human resources in 2010 compared to 2009 (18% vs. 9%). More than four in 10 (42%) are planning to increase their marketing budgets in 2010, and 30% plan to increase their sales initiative budgets. In addition, 46% will work to expand their online presence, and 36% will grow their social media initiatives.

One in eight small business owners (13%) will spend more than they think they should in their expansion efforts because they do not have time to find cost-saving solutions.

SOURCE: "Signs of the Times Small Business Survey," FedEx Office, Randy Scarborough, VP Marketing, 3640 Hacks Cross Blvd., Memphis, TN; 901-434-5201; www.fedex.com/office.

## Snapshot of Hispanic-, Black-, And Asian-Owned Businesses

There were 5.8 million emerging majority-owned businesses in 2007 — the most recent year for which data are available — according to the U.S. Census Bureau. The number of emerging majority-owned businesses grew 45.6% between 2002 and 2007, compared to an 18% increase in the number of U.S. businesses overall. Most emerging majority-owned businesses (5.0 million) did not have any employees (aside from the owner); these businesses had receipts totaling \$164.4 billion. The more than 768,000 businesses with employees had a total of 5.9 million workers, and their receipts totaled \$864.2 billion.

### Hispanic-Owned Businesses

- ▶ Hispanics owned 2.3 million businesses in 2007, up 43.6% from 2002.
- ▶ They generated \$345.2 billion in receipts.
- ▶ Three in 10 Hispanic-owned businesses were construction, maintenance, and personal/laundry services.

### Black-Owned Businesses

- ▶ Blacks owned 1.9 million businesses in 2007, up 60.5% from 2002.
- ▶ They generated \$137.4 billion in receipts.
- ▶ Nearly four in 10 Black-owned businesses were in health care and social assistance, maintenance, and personal/laundry services.

### Asian-Owned Businesses

- ▶ Asians owned 1.6 million businesses in 2007, up from 40.7\$ from 2002.
- ▶ They generated \$513.9 billion in receipts.
- ▶ A third of Asian-owned businesses (32.3%) were in maintenance, personal/laundry services, and professional, scientific, and technical services.

SOURCE: "Estimates of Business Ownership By Gender, Ethnicity, Race, and Veteran Status," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

## American Execs' Money Matters

The business elite — executives at the largest and most profitable companies in the U.S. — are predominantly male, college educated, C-suite level, and wealthy, according to Ipsos. They are heavy investors, with only 2% not owning any investments.

Nearly half (49%) have stock in the company for which they work, 69% have stock in a publicly-traded American company, and 32% have stock in a publicly-traded foreign company. Most (68%) have mutual funds. More than a quarter (28%) have government securities.

Three quarters (75%) have an IRA, 401(k), or other retire-

ment plan, and 46% have life insurance investments.

Three in 10 (30%) have an investment property.

**SOURCE:** "2010 Business Elite USA Survey," Ipsos, James Torr, Director, Kings House, Kymberley Rd., HA1 1PT Harrow, UK; +44 (0) 20 8861-8173; james.torr@ipsos.com; www.ipsos.com. Price: Call for information.

## Business Executives Embrace Smartphones

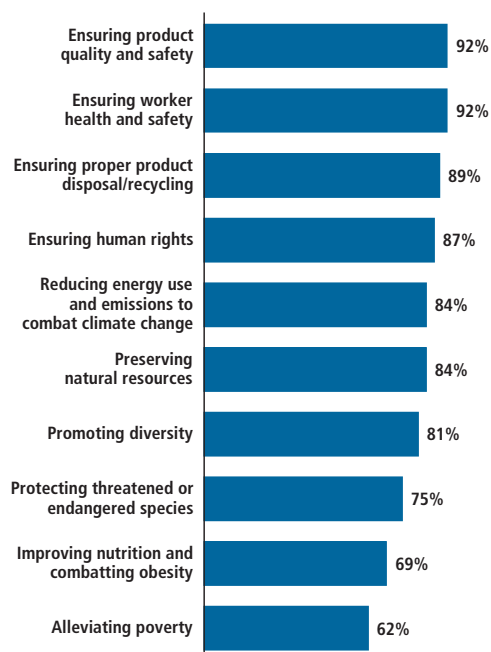
A majority of the business elite (57%) — executives at the largest and most profitable businesses in the U.S. — have smartphones or handheld computers, according to Ipsos. Those who engage in international business (67%) are more likely than average to have such a device. C-suite members (61%) and executives, vice presidents, and managers (61%) are more likely than directors and department heads (41%) to have smartphones or handhelds. Those with annual salaries of \$250,000 (65%) are more likely than average to have such a device.

**SOURCE:** "2010 Business Elite USA Survey," Ipsos, James Torr, Director, Kings House, Kymberley Rd., HA1 1PT Harrow, UK; +44 (0) 20 8861-8173; james.torr@ipsos.com; www.ipsos.com. Price: Call for information.

## Consumers To Businesses: Take Responsibility, Tell The Truth

The vast majority of consumers (92%) want companies to tell them about how they are socially responsible in their improvement of their products, services, and operations, according to Cone Inc.

ISSUES CONSUMERS BELIEVE RESPONSIBLE COMPANIES SHOULD ADDRESS, 2010



**SOURCE:** Cone Inc.

However, 87% of consumers are also skeptical because they think companies broadcast the positive stories but withhold negative news about their businesses. Two thirds (67%) say the messages companies share about their social and environmental commitments are confusing.

Consumers are most interested in learning about companies' socially responsible activities in relation to:

- ▶ Business habits (85%);
- ▶ Products and packaging (83%);
- ▶ Causes (81%); and
- ▶ Marketing and advertising (74%).

They want to influence companies' actions through participation in surveys and research (70%), buying from those that behave responsibly and boycotting those that do not (44%), and by communicating with employees via phone or email (32%). If a company incorporated their ideas, consumers would be more likely to buy its products and services (60%), would be more loyal (54%), and would be more likely to recommend it to others (51%).

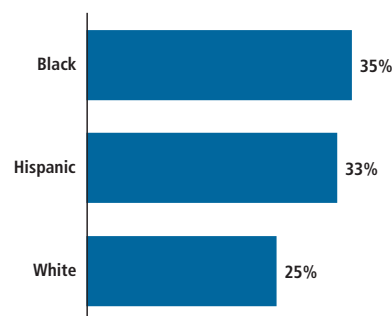
**SOURCE:** "Shared Responsibility Survey," Cone Inc., Carol Cone, 855 Boylston St., Boston, MA 02116; 617-227-2111; cccone@coneinc.com; www.coneinc.com. Price: Call for information.

## Hispanics And Blacks Reward Corporate Community Involvement

The vast majority of Blacks (84%) and Hispanics (79%) say that companies that make sincere efforts to be a part of their communities deserve their loyalty, according to The Futures Company and VanguardComm. Companies are missing out on this opportunity, however, because 68% of Blacks and 66% of Hispanics feel that very few brands genuinely care about the state of their communities.

Companies could be earning loyal customers through cause related marketing and corporate social responsibility. The nature of the involvement is key, says Esther Novak, founder and CEO of VanguardComm. A company needs to be "very proactive to reinforce the notion of sustainability and

CONSUMERS WHO 'ALWAYS' OR 'ALMOST ALWAYS' CHOOSE BRANDS FROM COMPANIES THAT SUPPORT CAUSES THEY BELIEVE IN, BY RACE/ETHNICITY, 2010



**SOURCE:** The Futures Company and VanguardComm

really caring.” She adds that the effort should be system-wide, from the company headquarters to the local level.

Corporate community involvement is particularly important to Blacks and Hispanics because of their cultural outlook and collective mindset. Churches and local advocacy organizations can be key partners for companies that want to get involved in the community, says Novak. Education and personal/family safety are among the causes that are most important to both Blacks and Hispanics. Immigration has also become a hot topic among Hispanics.

**SOURCE:** VanguardComm, Esther Novak, Founder and CEO, 100 Bayard St.; 3rd Fl., New Brunswick, NJ 08901 732-246-0405; enovak@vanguardcomm.com; www.vanguardcomm.com.

## **Cleaning Gets The Brush Off From Businesses**

Although 31% of business owners acknowledge that cleanliness and appearance have a significant impact on customer impressions, 29% have scaled back on workplace cleaning, finds Procter and Gamble. Nearly half (44%) say they have experienced negative repercussions — such as customer and employee complaints and longer cleaning time when using cheaper products.

Most business owners say that finding the time to clean is the greatest barrier to keeping their workplace clean (60%), compared to only 14% who cite messy staff.

The swine flu epidemic has impacted the cleaning process for 47% of businesses, and 49% would like free resources and advice from trusted sources to help them address the problem.

**SOURCE:** “Mr. Clean Professional Small Business Index,” Procter & Gamble, Susan Baba, Home Care, One P&G Plaza, Cincinnati, OH 45202; 513-983-7643; baba.so@pg.com; www.pg.com.

# computers / electronics

Americans have become so reliant on tech gadgets — such as smartphones, netbooks, and iPads — that they would feel completely out of touch without them. Four in 10 users say they are connected at all times. Young adults are more likely than older adults to be avid tech device users. However, some people (particularly men aged 25-34) feel they are too connected and need more downtime away from technology.

Hispanics are more connected than ever. Those who are foreign-born and Spanish-dominant are catching up with Americans overall in terms of computer ownership. Bicultural Hispanics are more likely than other Hispanics and Whites to go online daily. They are also most likely to own a wide variety of devices including cell phones, DVD players, laptops, MP3 players, and HDTVs.

Shoppers were intrigued by 3DTV sets, but few bought them. Americans are still trying to figure out how they work, what content is available for them, and if they would fit into their lives. It is far from a “sure thing” that these devices will truly catch on. The introduction of the iPad made waves in the computing world as millions of Americans snapped them up. Tablet computers are more likely than 3DTVs to see mainstream adoption in the next few years.

Many parents give their children their own electronic devices. Age eight or nine is when they get their first such equipment, such as an MP3 player or a videogame console. When kids reach age 12, most have their own computer and nearly half have their own TV. A majority of parents prefer their child be more mature before having their own page on a social network, saying that should wait until they are 16 or older. Children most commonly get their first cell phone in their teen years as well.

## Connected Consumers And Their Devices

A quarter of those who use tech gadgets (25%) — including smartphones, iPads, and netbooks — would feel completely disconnected if their devices were taken away for a week, finds Burst Media. That may be because two thirds who have such devices are moderate users who fall into two groups — moderate users (25%) who like to connect but also enjoy downtime and heavy users (40%) who claim they are always connected.

Three quarters of men aged 18-34 are heavy users (40%) or moderate users (34%). Interestingly, men aged 25-34 are more likely than other groups (17%) to say that they are too connected and would like some time away from their devices.

Among women, 18-34 year olds are the most active as well, with 26% being heavy users and 42% moderate users. But it is women aged 35-44 (33%) who are most likely to feel completely disconnected without their devices.

**SOURCE:** "Technology Gadgets And The Impact On Consumer Actions And Behaviors," Burst Media, Chuck Moran, Director Marketing, 8 New England Executive Park, Burlington, MA 01803; 781-852-5291; cmoran@burstmedia.com; www.burstmedia.com.

## Consumer Electronics Outlook For 2010

Manufacturers of 3D televisions, videogame accessories, and other consumer electronics could see healthy sales in the second half of 2010 — provided that more consumers return to earning wages and salaries rather than receiving checks from Uncle Sam, according to the Consumer Electronics Association (CEA).

Presuming the economic recovery continues to advance, CEA suggests a positive sales outlook for product categories including televisions, tablet computers, and videogame accessories. With manufacturers currently shipping some 70,000 3D televisions a month to retailers, DuBravac looks for the category to see sales of between 1.5 million and 3 million units in 2010. According to a recent CEA survey, 80% of sales associates at electronics retailers see increased consumer interest in 3D sets. Yet roughly half of consumers, sales associates say, remain confused about the technology.

Overall television sales for 2010 will still be strong in the U.S. CEA projects sales of 37 million units in a nation of 114 million households. That means roughly one in three households will purchase a new TV this year. That is on top of a strong 2009, when unit sales rose 19% as consumers sought out cheap entertainment options.

Cash-strapped as it is, the consumer electronics market remains receptive to new products. Tablet computers (such as Apple's iPad) could see 6 to 8 million unit sales as a category this year.

**SOURCE:** "Mid-Year Reality Check," Presented at CEA Line Shows, Consumer Electronics Association, Shawn DuBravac, Chief Economist and Director of Research, 1919 S. Eads St., Arlington, VA 22202, 703-907-7675; sdubravac@ce.org; www.ce.org. Price: Call for information.

## The Future Of Reading: Electronic Devices Grow In Popularity

Only 5% of Americans own an eReader, though 77% are at least aware of the devices, according to Pricegrabber. A third (34%) are planning to buy a device that can be used as an eReader in the coming year with:

- ▶ 20% planning to buy an iPad;
- ▶ 12% an Amazon Kindle;
- ▶ 5% a Sony Reader;
- ▶ 5% a Barnes & Noble Nook;
- ▶ 1% a COOL-ER; and
- ▶ 5% another e-reader device.

The attributes of eReaders that make them most appealing to consumers are a touch screen (45%) and the portable size (39%). The greatest detractor is price, cited by 66%. For more than half of consumers (55%), \$150 is the maximum amount they would spend on an eReader. The average price of an eReader is \$250, putting the devices well beyond the price most shoppers are willing to pay.

More than four in 10 readers (41%) would miss aspects of printed books. Of those, 36% would miss the feel of a book, and 13% would miss the ability to make notes, mark, and highlight printed books. One in eight (13%) would miss aspects of portability, such as the ability to read during take-off and landing of flights and the durability of printed books as compared to the sensitivity of technology.

### ATTRIBUTES OF EREADERS THAT CONSUMERS FIND MOST AND LEAST APPEALING, 2010

	MOST APPEALING	LEAST APPEALING
Touchscreen	45%	15%
Device size	39%	32%
Availability of eBooks	37%	33%
Adjustable text size	37%	14%
Battery life	36%	13%
Eco-friendly (i.e. paperless)	33%	24%
Dictionary	22%	20%
Highlighting and note-taking	21%	30%
Price	13%	66%
E-ink display screen	8%	36%
Other	9%	17%

**SOURCE:** Pricegrabber

**SOURCE:** "eReader & eBook Trends," Pricegrabber, Michelle Kane, Public Relations, 5150 Goldleaf Circle, 2nd Fl., Los Angeles, CA 90056; 323-601-1200, x289; mkane@pricegrabber.com; www.pricegrabber.com. Price: Available upon request at no charge.

## Sales of Software Slump In 2009

Dollar sales of non-gaming software declined 7% in 2009 to \$2.4 billion, and unit sales decreased 6%, reports NPD Group. Sales of operating systems software posted a 162% increase in unit sales and a 35% increase in dollar sales on the heels of releases from both Apple and Microsoft. Busi-

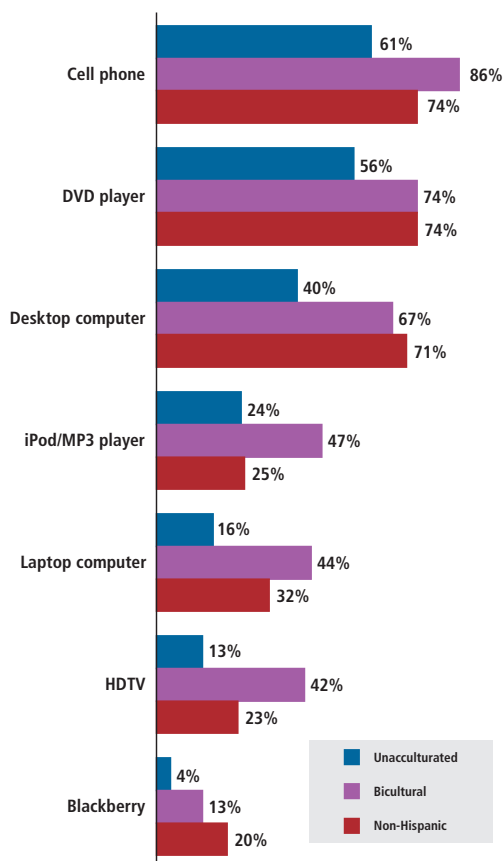
ness software also posted a 6% unit sales increase, but a 10% decrease in dollar sales as the average unit price fell. All other software categories (education, imaging/graphics, personal productivity, and system utilities) posted decreases in both unit and dollar sales.

**SOURCE:** NPD Group, Stephen Baker, VP Industry Analysis, 900 W. Shore Rd., Port Washington, NY 11050; stephen\_baker@npd.com; www.npdgroup.com. Price: Call for information.

## Bicultural Hispanics Are Tech-Savvy

Bicultural Hispanics (79%) are slightly more likely than non-Hispanics (75%) to go online daily, and both groups far exceed unacculturated Hispanics' daily Internet use (19%), according to Bank of America. Bicultural Hispanics' high Internet use may be explained by their higher rate of ownership of a variety of electronic devices, including computers and cell phones.

OWNERSHIP OF ELECTRONIC DEVICES,  
UNACCULTURATED HISPANICS VS  
BICULTURAL HISPANICS VS NON-HISPANICS, 2010



**SOURCE:** Bank of America

**SOURCE:** "Bicultural Hispanics: Examples From The Hispanic Market," Bank of America, Daniel Bloom, SVP Consumer Research and Analysis, 100 N. Tryon St., Charlotte, NC 28255; 704-388-5770; www.bankofamerica.com. Price: Call for information.

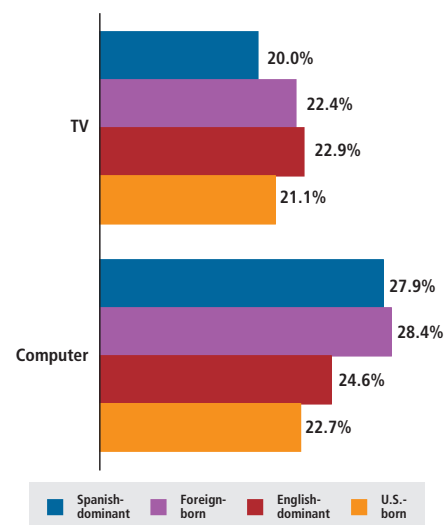
## Language Preference, Country Of Origin Affect Hispanics' Electronics Purchase Habits

About 20% of Hispanics are planning to buy a TV in the coming six months, according to BIGresearch and Televisa. U.S.-born (94%) and English-dominant Hispanics (94%) are slightly more likely than foreign-born (91%) and Spanish-dominant Hispanics (92%) to watch TV in a typical week. U.S.-born and English-dominant Hispanics (30% each) are more likely than foreign-born (23%) and Spanish-dominant Hispanics (21%) to use a TiVO or DVR.

About a quarter plan to buy a computer. Foreign-born and Spanish-dominant Hispanics (20% each) are nearly twice as likely to read blogs than U.S.-born and English-dominant Hispanics (13%).

U.S.-born, English-dominant Hispanics most commonly shop for electronics at Best Buy, Walmart, and Target. Foreign-born, Spanish-dominant Hispanics also shop Best Buy and Walmart, but add Amazon as their third-favorite store.

HISPANICS PLANNING TO PURCHASE A TV OR  
COMPUTER IN THE COMING SIX MONTHS, BY COUNTRY OF ORIGIN  
AND LANGUAGE PREFERENCE, 2010



**SOURCE:** BIGresearch

**SOURCE:** "Hispanic Consumers: Not All The Same," BIGresearch, Kim Rayburn, SVP Client Solutions and Marketing, 450 W. Wilson Bridge Rd., #370, Columbus, OH 43085; 614-846-0146; kim@bigresearch.com; www.bigresearch.com. Price: Call for information.

## My First Time: Parents Outline The Most Appropriate Ages For Children To Get Their Own Tech Gadgets, Electronics

"There have always been traditional kid milestones: the first day of school, the first time they eat solid foods. Now, there are technology milestones that kids are encountering,"

says Ipsos OTX Media CT's Donna Sabino.

Four in 10 moms (40%) say it was their decision to purchase their child's cell phone, according to Ipsos, yet it's important technology marketers target both parent and child, says Sabino. "Moms are the ones primarily making the purchasing decisions. At the same time, you want the kid participating in the discussion since they are the ones buying the supporting materials, [such as] downloads, games, and songs," says Sabino.

Sabino recommends cell phone companies showcase the device's security features when reaching parents and the device's "cooler" aspects, such as unlimited text messages or camera capabilities, when connecting with kids.

Ages eight and nine represent what Sabino calls the "age of enlightened access" because most parents start allowing kids these ages to acquire their first technological gadgets. "They start accessing a world they never have before. You can't get an MP3 or console without participating in a new market. If you have a \$300 PlayStation 3, you are also going to need to buy a \$60 game or two."

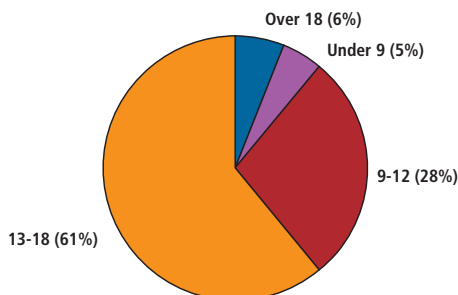
It may be a young age to have an expensive device, but parents see these products as a simple way to connect with their kids. "At the end of a busy and long day, parents are physically and creatively spent so they are using entertainment as a happy bonding moment. It's quality time they get to spend together that doesn't involve mom running to the craft store," says Sabino.

Yet, parents are not eagerly buying multiple tech devices for their eight-year-olds at once. They tend to have decisive viewpoints on the best ages to first purchase a technology device, according to electronics review website Retrevo. For instance, parents are more accepting that kids get their own computers before they get their own TVs.

### Cellphone At 13-18

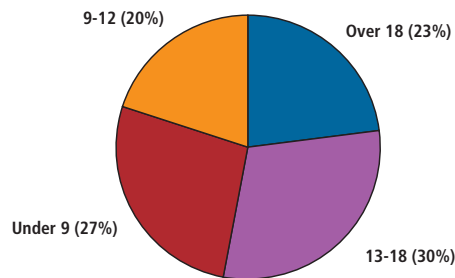
Although Ipsos research finds kids are increasingly receiving their first cellphone at age eight, six in 10 parents (61%) feel their child should first receive a cellphone as a teen. Three in 10 (28%) feel the tween years are the perfect time for their first cellphone.

**BEST AGE FOR CHILDREN TO HAVE THEIR FIRST CELLPHONE, ACCORDING TO PARENTS**



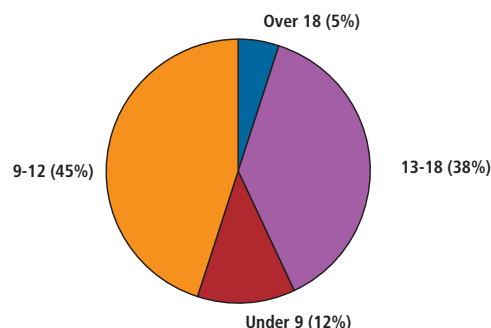
SOURCE: Retrevo

**BEST AGE FOR CHILDREN TO HAVE THEIR OWN TV, SAY PARENTS**



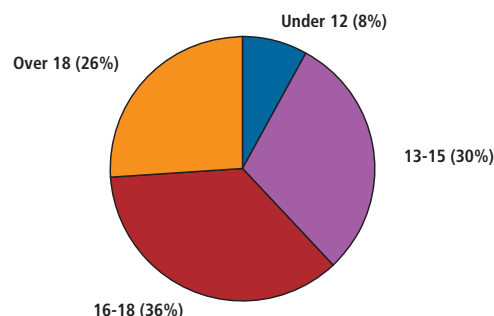
SOURCE: Retrevo

**BEST AGE FOR CHILDREN TO HAVE THEIR OWN COMPUTER, SAY PARENTS**



SOURCE: Retrevo

**BEST AGE FOR CHILDREN TO HAVE THEIR OWN SOCIAL MEDIA PAGES, SUCH AS FACEBOOK OR MYSPACE, SAY PARENTS**



SOURCE: Retrevo

Parents of 9-12-year-olds are more likely than parents of children under age 9 to think that children should get their first phone before their 12th birthday (43% vs. 31%). Only 6% of parents believe their children should wait until they graduate from high school before they get a phone.

### Half Say TV In Bedroom Is Okay Before Age 12

More than half of parents (53%) feel kids need to wait until they are at least 13 before they can have a TV in their bedroom. However, 27% of parents feel it's okay for those under nine to have their own TV, and 20% of parents of 9-12-



year-olds say it's okay for a TV in the bedroom. Parents of tweens are, once again, more accepting than parents of children under age nine to feel that it's okay for a child to have their own TV before age 12 (51% vs. 48%).

### Computers Are Acceptable At Young Ages

The accepted age for a child's first computer is lower than for cellphones or TV with 35% of parents of 9-12-year-olds feel that's the time for their child to receive their own computer; three in 10 parents (31%) feel it's okay for those under age nine to have their own computer.

Parents of those under age nine are more likely than parents of 9-12-year-olds to feel that kids should get computers before they turn 12 (73% vs. 61%).

While parents may allow children to have their own computer, they are not okay with them using social networking sites. The largest number of parents (36%) feel that kids shouldn't have their own profiles until they are at least 16, 30% are okay with them starting at age 13.

**SOURCES:** Ipsos OTX Media CT, Donna Sabino, SVP Kids and Family Insights, 212-524-8242; dsabino@otxresearch.com; www.ipsos-na.com.

Retrevo, Vipin Jain, President/CEO, 440 N. Wolfe Rd., Sunnyvale, CA 94085; 408-524-1594; vipin@retrevo.com; www.retrevo.com.

Nearly six in 10 suggestions (56%) involve socially-enabling innovations, such as video phones, and 31% are tools for creation, such as a game or a website.

One in 10 submissions involves 3D effects and 37% do not include the traditional keyboard/mouse interface.

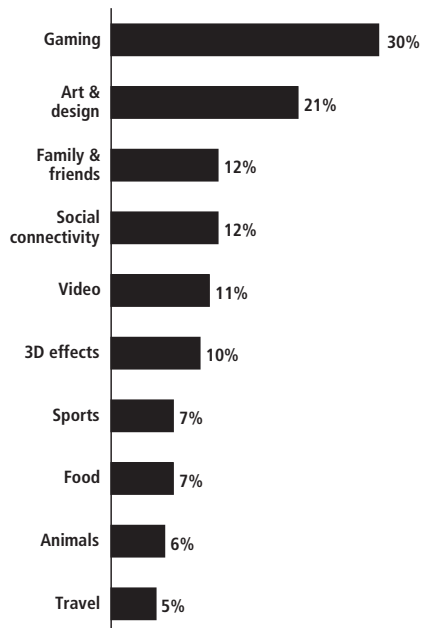
Some suggestions are more realistic than others. Some 7% of suggestions involve food, including the ability to create meals from the technology.

**SOURCE:** Latitude, Jessica Reinis, Research Analyst, 275 Cabot St., Beverly, MA 01915; 978-921-0712; jreinis@latd.com; www.latd.com.

## Kids Outline What Their Dream Technology Entails

Children want their future technology to offer more immersive content experiences, such as voice-controls, 3D images, and touchscreens, according to research consultancy Latitude.

KEY THEMES CITED IN CHILDREN'S DREAM TECHNOLOGICAL DEVICES, 2010



**SOURCE:** Latitude

## factoids

- ▶ The **electronics devices** parents most commonly plan to buy for their children in the coming year include an HDTV (18%), a cell phone (17%), and a digital camera (17%). (*NPD Group; phone: 516-625-2277*)
- ▶ The average American household spent \$1,380 on **consumer electronics** in the prior year, up \$151 compared to 2008. (*Consumer Electronics Association; phone: 703-907-4358*)
- ▶ Of the 13% of college students who have purchased an **e-book**, 77% read it on a computer or netbook rather than an e-reader device; that is likely because only 8% of college students report owning an e-reader device. (*OnCampus Research; phone: 800-622-7498, x2351*)
- ▶ Most parents (65%) say **charging their electronic devices** is a daily activity, though (62%) dislike the cords that come with their gadgets and 68% say they clutter up their homes. (*Duracell; phone: 203-796-4669*)

# demographics

The American population may not be a minority-majority — in which the combined Black, Asian, and Hispanic population outnumbers the White population — until 2050 rather than in 2042 as the U.S. Census Bureau had previously predicted. Immigration from Mexico to the U.S. has slowed due to the recession, meaning the Hispanic population will not grow as rapidly as expected.

The Hispanic population continues to have the highest birth rate, followed by Asians. The proportion of Americans under age 18 who are Hispanic and Asian is rising. The proportion that is White is also growing slightly. Conversely, the proportion of the under-18 population that is Black is decreasing.

The Hispanic and Asian populations are spreading out across the U.S. The numbers of Hispanics and Asians living in Chicago and Washington, D.C., are growing rapidly.

Not only is the racial structure of the American population changing — so is the family structure. More Americans are remaining single for longer, and as a result, there are more single-person households than ever before.

Family households are also changing. Millennials are less likely than previous generations to grow up in two-parent households. More than a third say their parents are divorced, separated, or were never married.

The recession has also made its mark on household composition — many Millennials moved back in with parents due to financial or career difficulties.

## 2009 American Community Survey: Characteristics Of Hispanics, Workers, Family, And Children

The American population surpassed 307 million in 2009, according to the U.S. Census Bureau's 2009 American Community Survey. A slight majority of the population is female (50.7%), and 49.3% are male. The average American is 36.8 years old and 49% of those aged 15 and older are married. The typical American has a 3.23-person family and lives in a 2.63-person household.

### Hispanic Population

More than 48 million Hispanics lived in the U.S. in 2009, accounting for 15.8% of the population. Unlike the general population, men (51.7%) account for a greater proportion of Hispanics than do women (48.3%). The Hispanic population has a lower median age (27.3 years), which breaks down as follows:

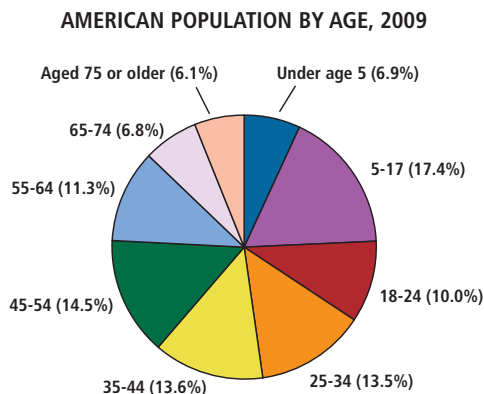
- ▶ 34.6% of Hispanics are under age 18, compared to 24.3% of the total population;
- ▶ 28.4% are aged 18-34, compared to 23.5% of the total population;
- ▶ 31.4% are aged 35-64, compared to 39.4% of the total population; and
- ▶ 5.6% are aged 65 and older, compared to 12.9% of the total population.

Due in part to the youth of the Hispanic population, they are less likely than average to be married (45.3% vs. 49.3%) or widowed (3.4% vs. 6.1%), and more likely than average to be single (39.6% vs. 31.8%).

One in five Americans aged five and older (19.9%) speak a language other than English at home, including 12.4% who speak Spanish or Spanish Creole. Slightly more than half of Spanish and Spanish Creole speakers (51%) are native-born Americans, 14% are naturalized citizens, and 35% are not citizens.

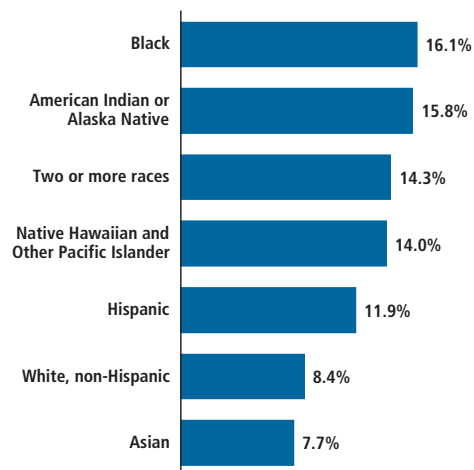
### American Workers

About two thirds of Americans aged 16 and older (65%)



SOURCE: U.S. Census Bureau

AMERICANS AGED 16 AND OLDER IN THE LABOR FORCE WHO WERE UNEMPLOYED IN 2009



SOURCE: U.S. Census Bureau

were in the labor force in 2009, and 9.9% of those were unemployed. Young workers were more likely than their older peers to experience unemployment: 27% of 16-19 year olds were unemployed, as were 16% of 20-24 year olds. Women in the labor force (8.3%) were less likely than men (10.0%) to be unemployed; however, women in the labor force who had children under age 6 (10.7%) were more likely than average to be unemployed. Emerging majorities, excluding Asians, were more likely than Whites to be unemployed.

American workers aged 16 and older earned a mean of \$28,365 in 2009. Men earned a median of \$33,280, compared to a median of \$23,513 for women. More than a third of workers (37%) earned \$50,000 or more in 2009, including 44% of men and 29% of women. One in 10 workers (10%) earned \$100,000 or more, including 13% of men and 5% of women.

Workers aged 16-64 spent an average of 38.4 hours per week at their job. Men worked an average of 40.9 hours, compared to an average of 35.7 hours.

More than three quarters of workers (76%) drove to work by themselves, and 10% carpooled. Some 5% took public transportation, 3% walked, 2% took another form of transportation, and 4% worked from home. The average worker's commute was 25.1 minutes.

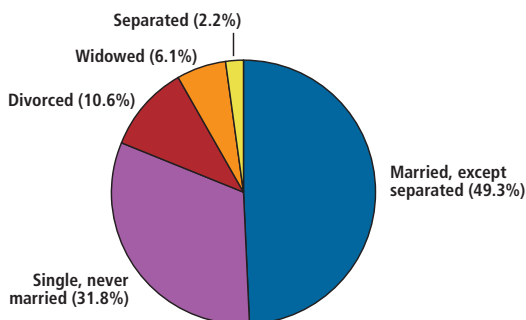
### Marriage And Family

Nearly half of Americans aged 15 and older (49%) are married. Asians (60%) are more likely than Whites (53%), Hispanics (45%), those of two or more races (35%), and Blacks (30%) to be married.

About 4.5 million Americans got married in 2009, and 2.3 million Americans got divorced. The average age of men who got married was 30.9 years, and for women it was 29.1. Among those who got divorced, the average age for men was 42.5 and for women it was 40.5.

Some 1% of households are same-sex unmarried couples,

AMERICANS' MARITAL STATUS, 2009



SOURCE: U.S. Census Bureau

and 5% are opposite-sex unmarried couples. The average married couple household includes 3.3 family members, compared to an average of 1.3 for non-family households. Three in 10 households (30%) include the householder's own children under the age of 18.

### American Youth

There were 74.2 million children under age 18 in the U.S. in 2009. Only 4% of those were foreign-born. A slight majority of children (55%) were non-Hispanic White, 22% were Hispanic, 14% were Black, 5% were of two or more races, and 4% were Asian.

The vast majority of children (89%) lived with their own parents, whereas 7% lived with a grandparent, 2% with other relatives, and 2% with non-related adults, such as a foster parent. Nearly one in 10 children (7%) lived in a household that included an unmarried partner of the adult with whom they lived.

Nearly a quarter of children (23%) received public assistance in 2009, and 20% lived in a household with an income below poverty level.

Nine in 10 children aged three to 17 (90%) were enrolled in school in 2009. The vast majority (86%) attended a public institution; 14% attended a private school. Some 87% of children aged 15 to 19 were enrolled in school in 2009, and 13% were not, including 6% who were idle, neither enrolled in school nor working. The majority of 15 to 19 year olds enrolled in school attended a public institution (87%); 13% attended private school.

SOURCE: "2009 American Community Survey," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

## Millennials Are Less Likely To Have Grown Up In A Traditional Two-Parent Home

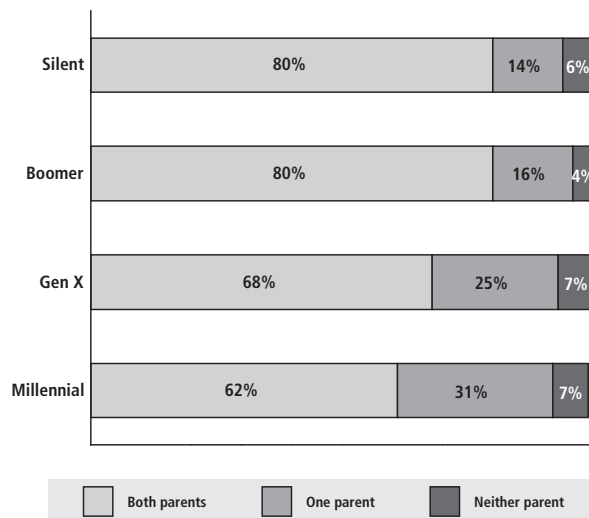
Millennials are the generation least likely to have been raised by two parents, according to the Pew Internet and American Life Project.

One in four (24%) say their parents were divorced or sep-

arated, and 11% say their parents were never married. Notably, one in eight "boomeranged" back to a parent's home because of the recession.

Millennials also say they had fewer arguments with their parents than older generations had with theirs.

FAMILY STRUCTURE DURING CHILDHOOD, BY GENERATION



SOURCE: Pew Internet & American Life Project

SOURCE: Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

## Many Generations Under One Roof

Multigenerational households account for 16% of households in 2010, up from a low of 12% in 1980, according to the U.S. Census Bureau. Nearly half of multigenerational households (47%) include two adult generations, 47% include three or more family generations, and 6% are "skipped generation" households in which grandparents live with grandchildren.

SOURCE: U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov.

## Census Update: The U.S. Becomes A Minority-Majority In 2050

Assuming a constant rate of net international migration (birth, death, and immigration), the U.S. will become a minority-majority — in which emerging majorities outnumber Whites — in 2050, according to the U.S. Census Bureau. This revises the Bureau’s 2008 prediction that the switch would occur in 2042 and returns it to the original mark following the 2000 Census. Among children under age 18, the population will not become a minority-majority until 2031, instead of 2023 as previously forecast.

The slumping U.S. economy is partly at fault for the revised forecast. Immigration is down during the recession — the Pew Hispanic Center reported that 2009 was the first year in more than a decade for which immigration from Mexico slowed (see “Mexican-Born Population In U.S. Dips...” in Research Alert, August 7, 2009, p. 8). The poor job market and struggling U.S. dollar have made the country less attractive to immigrants.

The aging White population is predicted to fall to 49.9% by 2050, down from 65.2% in 2010. The Black population is predicted to remain relatively stable at 13.2%, up from 12.9%. The Hispanic and Asian populations are projected to explode. Hispanics will account for 27.8% of the population, up from 15.8%, and the Asian population will grow to 6.1%, up from 4.4%.

The average age of an American will rise to 39.7 in 2050, up from 37.1 in 2010, largely because of the aging White pop-

ulation. The average age of a White American in 2050 will be 45, making them the oldest group. Asians are the second oldest with a projected average age of 42. Blacks will have an average age of 40, followed distantly by Hispanics, with an average age of 33. The youngest group of Americans are those of two or more races, with an average age of 25.

**SOURCE:** “United States Population Projections: 2000 to 2050,” U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

## Profile Of Children Of Emerging Majorities: Hispanic And Latino Populations Growing Fastest

Latino children under age 18 accounted for the largest proportion of emerging majority children in the U.S. in 2008 (21.7%), up from 17.1% in 2000, according to U.S. Census Bureau statistics. Only two other groups of emerging majority children are increasing as a proportion of the U.S. population. Asian children account for 4%, up from 3.4% in 2000. The proportion of White children grew to 69.3%, up from 68.6%. Overall, 3.8% of children in the U.S. are foreign-born.

Conversely, the proportion of Black children dropped to 14.3% in 2008 from 15.1% in 2000. A small group to begin with, the proportion of American Indian and Alaska Native children fell to 0.9%, a decrease of 25%.

Children of “other” races fell to 6.7% of the total from 7.6% in 2000, while children of two or more races grew to 4.6% from 4.0% — both changes likely the result of an update to the way the Census surveys race. The proportion of Native Hawaiian and Pacific Islander children remained constant.

What does all this mean? Census data suggests Latino and Asian families are having more children than the other populations.

### Young Children

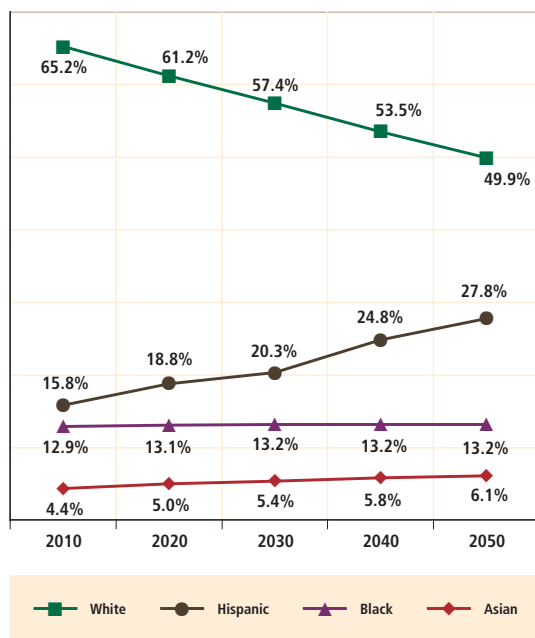
More than a quarter of children in the U.S. (28.3%) are under age five, up from 26.5% in 2000. More than a third of children of two or more races (34.6%) are under age five, followed by Hispanic children (32.7%) and children of other races (32.1%). Fewer than three in 10 Asian children are under age five (29.0%), as are White children (27.8%), American Indian and Alaska Native children (27.6%), Black children (26.9%), and Native Hawaiian and Pacific Islander children (26.6%).

The relatively large proportion of young Hispanics corresponds to them having the youngest average age of any group of emerging majorities (27.5 years old). Whites are the oldest group on average (39.1), followed by Asians (36.1), and Blacks (32.1).

### Two-Parent Homes

White and Asian children are more likely than those of other races and ethnicities to live in households with mar-

PROPORTION OF THE POPULATION WHITES, HISPANICS, BLACKS, AND ASIANS ACCOUNT FOR, 2010-2050 (PROJECTED)



SOURCE: U.S. Census Bureau

ried parents. Whites account for 74.9% of children in married households, though they account for 69.3% of children. Asians account for 5% of children living in married couple households, and 4% of children. Black children account for 7.6% of children living with married parents, but for 14.3% of children overall.

More likely than others to live with a single parent, Black children represent 32.2% of children living with an unmarried mother, and 14.9% of those living with an unmarried father. Latino children are more likely to live with a single parent than with a married parent. As opposed to Blacks, they're more likely to live with a single father (accounting for 28.4% of children who do so) than a single mother (24% of children who do so).

About one in five children in the U.S. (18.2%) lives in poverty.

### Teenagers

Hispanic girls aged 15-19 (3.9%) are more likely than White (1.7%) or Black girls their age (1.1%) to have married and set up their own households. Among boys that age, Hispanics (1.6%) are more likely than Whites (0.8%) and Blacks (0.9%) to have done so. These proportions have all dropped since 2006.

White children age 16-19 (47.3%) are more likely than Blacks (37.8%) and Hispanics the same age (40.6%) to have a job. Black and Hispanic teens aged 16-19 are almost as likely to be neither going to school nor working (8.2% and 7.9%, respectively). By comparison, 5.3% of White children are neither enrolled in school nor working.

#### RACE/ETHNICITY OF AMERICAN CHILDREN UNDER AGE 18, 2000 VS. 2008

	2000	2008	CHANGE '00 VS. '08
White	68.6%	69.3%	0.7%
Black	15.1%	14.3%	-5.3%
Asian	3.4%	4.0%	17.6%
American Indian or Alaska Native	1.2%	0.9%	-25.0%
Native Hawaiian and other Pacific Islander	0.2%	0.2%	0.0%
Other race	7.6%	6.7%	-11.8%
Two or more races	4.0%	4.6%	15.0%
Hispanic or Latino, any race	17.1%	21.7%	26.9%

SOURCE: U.S. Census Bureau

SOURCE: "American Community Survey, 2006" and "Census 2000," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov.

## Emerging Majorities Disperse Throughout The U.S.

Emerging Majorities accounted for 83% of U.S. population growth between 2000 and 2008, according to a Brookings Institution analysis of U.S. Census Bureau data. The Hispanic population accounted for 52% of the total population

### METROPOLITAN AREAS WITH THE LARGEST POPULATIONS OF HISPANICS AND ASIANS, AND THOSE WITH THE FASTEST GROWING POPULATIONS, 2000-2008

#### Largest Population, 2008

##### HISPANICS

Los Angeles-Long Beach-Santa Ana, CA	5,719,200
New York-Newark, NY-NJ-PA	4,111,500
Miami-Fort Lauderdale-Pompano Beach, FL	2,142,735
Houston, TX	1,945,200
Chicago-Naperville-Joliet, IL-IN-WI	1,903,700
Riverside-San Bernardino-Ontario, CA	1,879,400
Dallas-Fort Worth-Arlington, TX	1,731,300
Phoenix-Mesa-Scottsdale, AZ	1,321,700
San Antonio, TX	1,080,500
San Diego, CA	926,900

##### ASIANS

Los Angeles-Long Beach-Santa Ana, CA	1,782,400
New York-Newark, NY-NJ-PA	1,777,300
San Francisco-Oakland-Fremont, CA	960,800
San Jose-Sunnyvale-Santa Clara, CA	550,500
Chicago-Naperville-Joliet, IL-IN-WI	504,600
Honolulu, HI	471,100
Washington-Arlington-Alexandria, DC-VA-MD-WV	460,300
Seattle-Tacoma-Bellvue, WA	368,400
Houston, TX	326,300
San Diego, CA	311,300

#### Fastest Growing Population, 2000-2008

##### HISPANICS

Riverside-San Bernardino-Ontario, CA	635,300
Dallas-Fort Worth-Arlington, TX	596,900
Houston, TX	574,100
Los Angeles-Long Beach-Santa Ana, CA	567,600
New York-Newark, NY-NJ-PA	515,300
Phoenix-Mesa-Scottsdale, AZ	492,200
Miami-Fort Lauderdale-Pompano Beach, FL	421,600
Chicago-Naperville-Joliet, IL-IN-WI	395,600
Atlanta, GA	245,300
Washington-Arlington-Alexandria, DC-VA-MD-WV	225,600

##### ASIANS

New York-Newark, NY-NJ-PA	355,700
Los Angeles-Long Beach-Santa Ana, CA	205,300
San Francisco-Oakland-Fremont, CA	130,900
Washington-Arlington-Alexandria, DC-VA-MD-WV	119,500
San Jose-Sunnyvale-Santa Clara, CA	108,900
Chicago-Naperville-Joliet, IL-IN-WI	106,000
Dallas-Fort Worth-Arlington, TX	96,400
Houston, TX	90,300
Seattle-Tacoma-Bellvue, WA	87,905
Riverside-San Bernardino-Ontario, CA	86,400

SOURCE: Brookings Institution analysis of U.S. Census Bureau data

increase in that period, whereas the White population accounted for 17%, the Black population for 13%, the Asian population for 13%, the American Indian population for 1%, and those of two or more races for 2%.

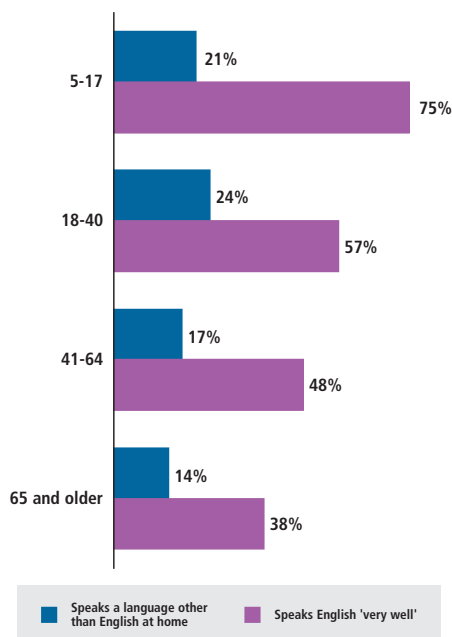
Hispanics and Asians are dispersing from typical “gateway metropolitan areas” where heavy immigrant populations reside to other areas in the U.S. For example, while the largest populations of Hispanics resided in Los Angeles and New York City in 2008, the areas with the largest increase in number of Hispanics between 2000 and 2008 were Riverside, CA, and Dallas. Among Asians, Washington, DC, Dallas, TX, and Riverside, CA, are growing rapidly, though not as fast as the gateway cities of New York and Los Angeles.

**SOURCE:** “State Of Metropolitan America,” Brookings Institution, Strobe Talbott, President, 1775 Massachusetts Ave. NW, Washington, DC 20036; 202-797-6000; communications@brookings.edu; www.brookings.edu. Price: Available online at no charge.

## Households That Speak A Language Other Than English At Home Can Also Speak English Well

One in five people living in the U.S. (55.4 million or 20%) spoke a language other than English at home in 2007, according to the most recent data available from the U.S. Census Bureau. However, that does not mean they do not speak English. In fact, 56% of those who speak a language other than English at home speak English very well, and another 20% speak it well.

ENGLISH-SPEAKING ABILITY OF THOSE WHO SPEAK A LANGUAGE OTHER THAN ENGLISH AT HOME, BY AGE, 2007



**SOURCE:** Research Alert analysis of U.S. Census Bureau data

Those aged 18-40 (24%) are the most likely to speak a language other than English at home, followed by those aged 5-17 (21%), aged 41-64 (17%), and aged 65 and older (14%).

The states with the highest proportions of people who speak a language other than English at home are:

- ▶ California (43%);
- ▶ New Mexico (36%);
- ▶ Texas (34%);
- ▶ Arizona (29%); and
- ▶ New York (29%).

The proportion of the population that spoke a language other than English at home grew 140% between 1980 and 2007, compared to a 34% increase in the overall population.

Spanish was the most common foreign language spoken in U.S. households, with 34.5 million speakers, an increase of 211% between 1980 and 2007. However, other languages are increasing more rapidly, including:

- ▶ Vietnamese, with 1.2 million speakers (up 511%);
- ▶ Russian, with 851,000 speakers (up 391%);
- ▶ Korean, with 1.1 million speakers (up 299%);
- ▶ Chinese, with 2.5 million speakers (up 291%); and
- ▶ Persian, with 350,000 speakers (up 227%).

**SOURCE:** “Language Use In The U.S., 2007,” U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

### FAST FACTS:

#### U.S. Population

Minorities accounted for 48% of babies born in 2008 (the most recent data available), compared to 37% in 1990.

- ▶ 25% of babies born in 2008 were Hispanic;
- ▶ 15% were Black;
- ▶ 4% were Asian; and
- ▶ 4% were multiracial.

**SOURCE:** U.S. Census Bureau, 301-763-3030.



# education

Americans believe the U.S. educational system is falling behind that of other countries, and they may be right. A slight majority of teachers say their students do the minimum amount of work to get by.

There are several factors that influence students' interest in doing well in classes: Those who are engaged in other school activities such as sports, clubs, and extracurricular lessons are more likely than those who are not to be on track academically.

Students have their own ideas about what would make them better students, including increasing technology use in the classroom, reminding them how lessons will help them when they enter the workforce, and paying them to attend class.

Keeping tabs on kids affects their diligence in both schoolwork and participation in summer reading programs. Teens studying for the ACT or SAT say they are more likely to keep up with their studies if their parents are able to track their progress and improvement.

Similarly, summer reading programs are more successful when libraries send out constant reminders about the progress that children should be making and when it is time for them to come in for new books.

## Keeping Students On Track: Key Factors That Ensure Children Are Engaged And Successful At School

There are expected to be 56.4 million students enrolled in school — pre-kindergarten through 12th grade — in fall 2010. Record enrollments are anticipated each year through 2017, when more than 60 million students will be enrolled in both private and public schools, according the National Center for Education Statistics.

**PROJECTED SCHOOL ENROLLMENT, 2010, 2014, 2017**  
(In millions)

	2010	2014	2017
Public Pre K through grade 8	35.70	37.40	38.40
Private Pre K through grade 8	4.72	4.93	5.07
Public grade 9-12	14.70	14.90	15.70
Private grade 9-12	1.32	1.23	1.29
<b>TOTAL</b>	<b>56.44</b>	<b>58.46</b>	<b>60.46</b>

**SOURCE:** National Center for Education Statistics

### What Makes Kids Enjoy School

Most students claim to be “highly engaged” in school, which translates to liking school, working hard, and being interested in school work. Asian students (71%) are more likely to be highly engaged than Hispanic (59%), White (54%), and Black (54%) students. Younger students aged 6-11 are also more likely than those aged 12-17 to enjoy school (59% vs. 52%). Those enrolled in talented or gifted programs (TAG) are twice as likely as those who are not to be highly engaged in school.

Even if students aren’t intrinsically motivated to do well in school, a number of factors can increase their involvement, including sports participation, living in a home with rules regarding their TV viewing, and attending the same school.

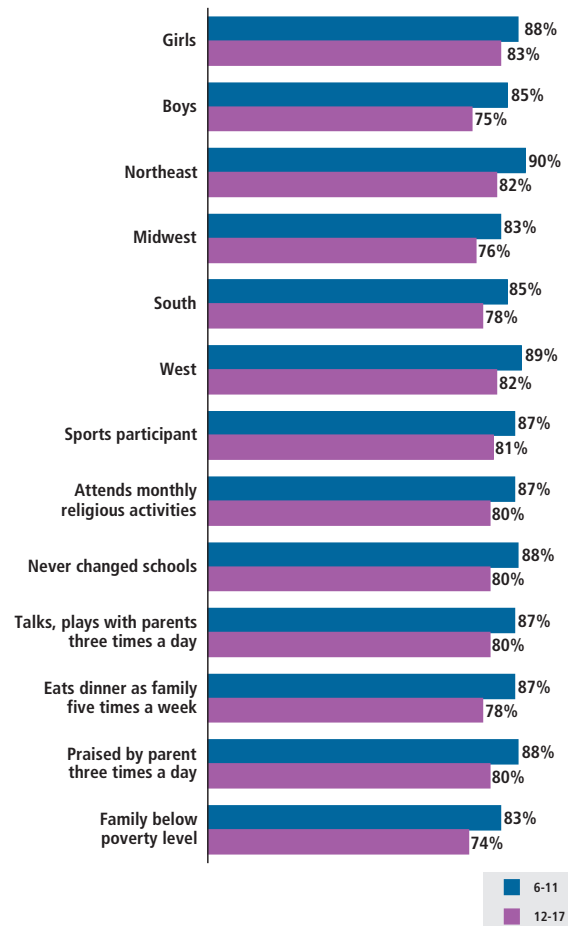
Parental interaction, notably, is one of the more significant factors ensuring a student’s engagement. Children who receive praise from their parents at least three times a day are 38% more likely than students who do not to be highly engaged in school. Students who play with parents for five minutes three or more times per day are 16% more likely to be highly engaged, and there’s a 24% greater chance for students to be highly engaged if they eat dinner with their parents at least five times each week.

However, parents’ educational level, where they live, and family income play little to no role in whether children are highly engaged in school.

### Making The Grade

Even though a student’s socio-economic status is insignificant in determining whether a student likes school, it does impact academic performance. Some 74% of students from families living below the poverty level are performing at or above grade level, compared to 82% of those students from

**STUDENTS WHO ARE ACADEMICALLY ‘ON TRACK’  
BY SELECT CHARACTERISTICS**



**SOURCE:** U.S. Census Bureau

families earning at least 200% above the poverty level. Students whose parents attended college have a slight edge in academic standing over those whose parents did not attend college (81% vs. 77%).

Students are more likely to do well in school if they play sports, participate in extracurricular lessons, and attend religious services at least monthly. Unlike the correlation between parental involvement and school engagement, a parent’s presence plays little role in impacting a student’s academic performance. Students whose parents eat dinner with them at least five times a week rank the same as those students whose parents don’t regularly eat dinner with them (86% each). Likewise, students who are praised by their parents a minimum three times a day perform academically on par with those receiving less frequent parental reinforcement (88% vs. 85%).

Moreover, children whose parents place few, if any, restrictions on TV viewing are more likely to be on track than students whose parents place more stringent rules (80% vs. 78%). Importantly, students have 42% greater odds of

being academically on track when their parents have high expectations for their futures.

**SOURCES:** National Center for Education Statistics, William Hussar, Projections Education Statistics, 202-502-7359; william.hussar@ed.gov; nces.ed.gov.

U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov.

## Teens Say Schools Need To Tell Them Why Today's Lessons Will Help Them In Workforce

The largest number of teens (93%) believe their own confidence is the most important factor in landing a good job, with an additional 83% believing work-readiness programs, if offered by schools, are critical in helping prepare for a successful career, according to Junior Achievement.

Nearly nine in 10 teens (87%) feel schools need to do a better job of helping them to understand more clearly how and why their class lessons will be useful later in the workforce.

### WAYS SCHOOL CAN BETTER PREPARE TEENS FOR THE WORKFORCE, ACCORDING TO TEENS, 2010

Help them understand why today's class lessons will be useful in the future .....	87%
Provide outside-school opportunities, such as job shadowing .....	85%
Offer programs that allow teens to work with others, encourage success .....	83%
Provide more career counseling.....	79%
Schools cannot do anything to help prepare students for the work force .....	1%

NOTE: More than one response permitted.

**SOURCE:** Junior Achievement

**SOURCE:** Junior Achievement, Stephanie Bell, One Education Way, Colorado Springs, CO 80906; 719-540-6171; sbell@ja.org; www.ja.org.

## Paying Kids To Learn: What Works

Paying kids to learn works if they are given the proper incentives, according to a study involving 18,000 students in four cities who earned a total \$6.3 million. Students respond best to situations where there is little risk of failure. In other words, paying students based on attendance is more effective than paying them to do well on tests.

More specifically, paying students to read dramatically improves reading comprehension scores. Likewise, students do better on standardized reading tests when they receive money for attendance and good behavior. However, students do not achieve better testing results when they are paid per grade or when they receive high test scores.

**SOURCE:** Educational Innovation Laboratory at Harvard University, Roland Fryer, 44 Brattle St. 5th Fl., Cambridge, MA 02138; 617-495-9592; rfryer@fas.harvard.edu; www.economics.harvard.edu.

## Few Hispanics Get GEDs; Language And Value Are Barriers

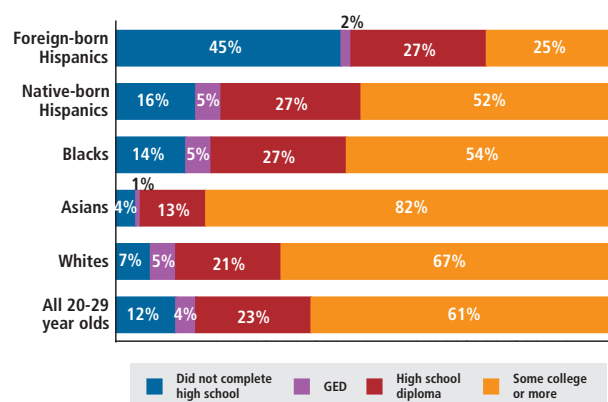
More than a third of Hispanics aged 20 and older (37%) were high school dropouts in 2008 — the most recent year for which data are available — compared to 18% of Blacks, 14% of Asians, and 10% of Whites, according to Pew Hispanic Center's analysis of U.S. Census Bureau data.

Slightly more than one in five high school dropouts (21%) earned a GED, including 29% of Whites, 20% of Blacks, and 9% of Hispanics. Those who earn GEDs are more likely than dropouts to pursue additional training and education.

Hispanic dropouts are less likely to obtain a GED because many are immigrants and the test requires fluency in English. Native-born Hispanic dropouts (21%) were as likely as dropouts overall to earn a GED.

The benefits of earning a GED are evident in earnings. Hispanics with a GED earned an average of \$33,504, compared to an average of \$27,635 for dropouts without a GED. However, that increase may be attributed more to language skills than the value of the certificate — English-speakers tend to earn more.

### EDUCATIONAL ATTAINMENT OF 20-29-YEAR-OLD AMERICANS, BY RACE, 2008



**SOURCE:** Pew Hispanic Center analysis of U.S. Census Bureau data

**SOURCE:** "Hispanics And The GED," Pew Hispanic Center, Paul Taylor, Director, 1615 L St. NW, #700, Washington, DC 20036; 202-419-4300; info@pewsocialtrends.org; www.pewsocialtrends.org. Price: Available online at no charge.

## Academic Slackers Come In All Genders; Teachers Confident They Can Combat It

Boys in grades K-12 are more likely than girls to admit to doing as little schoolwork as possible in order rise to the next grade level (36% vs. 31%), according to MetLife. Nearly half of all students (45%) say their peers have been promoted without being ready.

Teachers are aware of this lack of ambition. Half (51%) say their students only do enough work to get by, and only one

in three (36%) believe all of their students have the ability to succeed. However, these teachers also have confidence in their own ability to rectify the situation. More than eight in 10 (84%) feel they can enable all of their students to succeed academically.

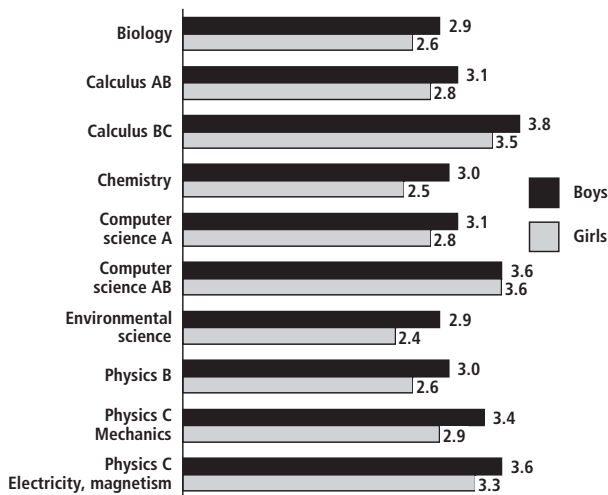
Although a majority of students (79%) plan to attend college, teachers expect only 50% will in fact attend a two- or four-year college. Girls are more likely than boys to aspire to college (85% vs. 73%) and to believe they will achieve their life goals (59% vs. 50%).

**SOURCE:** "The MetLife Survey of the American Teacher," MetLife, John Calagna, VP Communications, 27-01 Queens Plaza North, New York, NY 11101; 212-578-2211; jcalagna@metlife.com; www.metlife.com.

## Boys Outpace Girls On Math, Science AP Tests

Boys are more likely than girls to take advanced placement (AP) exams in math- and science-related courses, according to the AAUW. Boys also slightly outscore girls in all categories, except computer science in which the genders tie.

AVERAGE SCORES ON ADVANCED PLACEMENT TESTS, MATH AND SCIENCE SUBJECTS, BY GENDER, 2009



NOTE: Scale 1-5

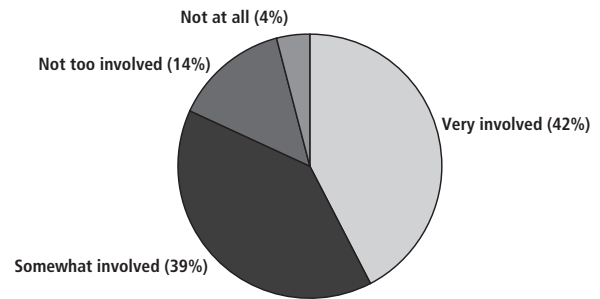
SOURCE: AAUW

**SOURCE:** AAUW, Linda Hallman, Executive Director, 1111 16th St., NW, Washington, DC 20036; 202-728-7602; connect@aauw.org; www.aauw.org.

## Most Parents Oversee Their Teen's Homework

Eight in 10 teens (81%) say their parents are "very" or "somewhat" involved in their school work, according to Kaplan Test Prep and Admissions. Teens are likely to be

## PARENTAL INVOLVEMENT IN TEEN'S ACADEMIC WORK



SOURCE: Kaplan Test Prep and Admissions

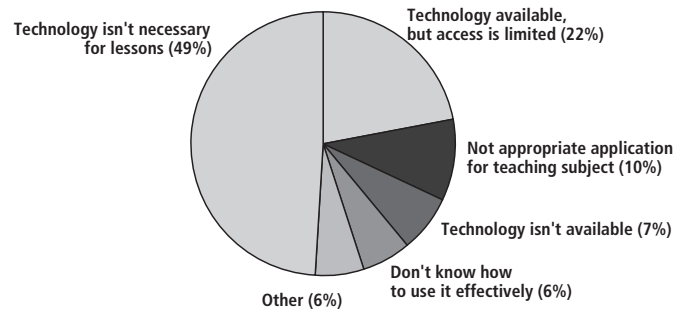
more invested in their work if their parent keeps tabs on them. Some 37% say they would have put more effort into the SAT or ACT prep courses if their parents were able to track their progress.

**SOURCE:** Kaplan Test Prep and Admissions, Russell Schaffer, 888 7th Ave., New York, NY 10106; 212-453-7538; russell.schaffer@kaplan.com; www.kaplan.com.

## Technology Still Lags In K-12 Classrooms

Only two in 10 K-12 teachers (22%) frequently use technology in their teaching, according to Grunwald Associates. The largest segment of teachers are infrequent users, which means they spend less than 10% of their class time using technology to support learning. There's no significant difference between technology usage and years of teaching experience.

## REASONS K-12 TEACHERS DON'T USE TECHNOLOGY IN CLASSROOM



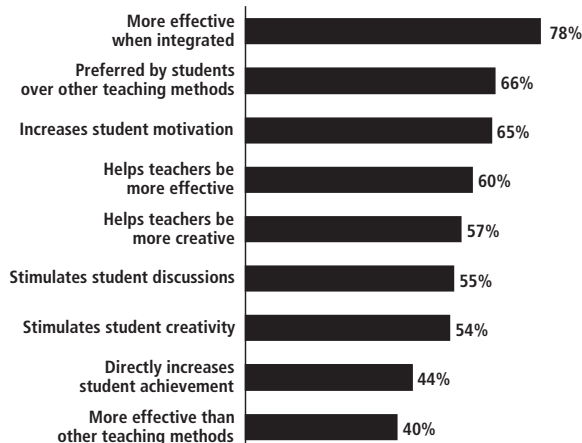
SOURCE: Grunwald Associates

**SOURCE:** Grunwald Associates, Peter Grunwald, President, 8307 Still Spring Ct., Bethesda, MD 20817; 301-637-2740; peter@grunwald.com; www.grunwald.com.

## Digital Media Increases Student Motivation, According To Teachers Study

More than four in 10 K-12 teachers (43%) who use digital media in the classroom instructed their students to create multi-media projects in 2009, up from 36% in 2008, according to Grunwald Associates and PBS. Some 38% taught their

**K-12 TEACHERS ON DIGITAL MEDIA USAGE IN CLASSROOM**



SOURCES: Grunwald Associates, PBS

students to create Web sites, up from 33% in 2008, and 15% used blogs as part of their teaching process, up from 11% in 2008.

SOURCES: Grunwald Associates, Peter Grunwald, President, 7825 Cayuga Ave., Bethesda, MD 20817; 301-263-9192; peter@grunwald.com; www.grunwald.com.

PBS Kids, Linda Simensky, VP Children's Programming, 2100 Crystal Dr., Arlington, VA 22202; 703-739-5000; lsimensky@pbs.org; www.pbskids.org.

**Teens Still Write, But Brevity Rules**

More than eight in 10 teens aged 12-17 (82%) say their typical school assignment is no longer than one page in length, according to the Pew Internet & American Life Project. Half (50%) write every day in school, 35% a few times per week, 7% several times a month, 7% rarely write in school, and 1% claim to never write at school.

Nearly all teens (98%) take notes in class, while 93% write essays, 92% pen something no longer than a page, and 74% engage in creative writing, such as poetry or plays, for class.

**MOST COMMON SCHOOL WRITING BY 12-17-YEAR-OLDS DURING PAST YEAR**

Take notes	98%
Write essays	93%
Short writing (one paragraph to one page)	92%
Creative writing (plays, poetry, fiction)	74%
Write up science lab	71%
Create audio, video, PowerPoint, multimedia presentation	69%
Write in journal	44%
Write notes, letters to others	38%
Write computer program	10%
Write music or lyrics	9%

SOURCE: Pew Internet & American Life Project

The majority (85%), unsurprisingly, regularly engage in some form of electronic communication, such as text messaging, emailing, or instant messaging. Fortunately for teachers, 60% of teens don't think of these electronic texts as "writing." Yet that's not to say they don't still use them at school. Some 38% have used text shortcuts or lingo for an assignment. One in four have used emoticons.

Schools are also using non-traditional teaching methods. One in three teens say they have played a computer or console videogame at school as part of a school assignment.

**MOST COMMON NON-SCHOOL WRITING BY 12-17-YEAR-OLDS DURING PAST YEAR**

Write notes, letters to others	64%
Write in journal	34%
Short writing (one paragraph to one page)	31%
Creative writing (plays, poetry, fiction)	25%
Write music or lyrics	25%
Create audio, video, PowerPoint, multimedia presentation	16%
Write essays	8%
Write computer programs	6%

SOURCE: Pew Internet & American Life Project

SOURCE: "Writing, Technology, And Teens," Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

**Summer Library Programs Boost Readers**

Two in three children (67%) have a library card, according to Dominican University with nearly half of families (46%) making at least four visits to the library during the summer months. One in 10 (11%) make three or four visits, 14% make two or three, 10% make one or two, and 18% do not visit a library during the summer.

Children who participate in summer reading programs are more likely than those who do not participate in these programs to be female, White, and come from a middle to upper class background.

**WHAT KIDS READ DURING THE SUMMER MONTHS**

Books not from library	91%
Library books	66%
Magazines	55%
Comic books	34%
Newspapers	23%
Websites	23%

NOTE: More than one response permitted.

SOURCE: Dominican University

SOURCE: "Public Library Summer Reading Programs Close The Reading Gap," Dominican University, Susan Roman, Project Coordinator, 708-524-6986; sroman@dom.edu; www.gslis.dom.edu.

## Key Factors In Successful Summer Library Reading Programs

Nearly all public libraries (95%) offer summer youth reading programs, according to Dominican University. Here are some key factors that ensure these programs are successful:

- ▶ Limit the program's run to eight weeks;
- ▶ Provide students with at least eight books matched to their reading level and interests;
- ▶ Send a postcard with each book to remind students what they should be doing;
- ▶ Send a letter (or email) to parents asking them to listen to their child's reading and provide feedback;
- ▶ Request these letters be returned with the feedback so program directors can track the effort.

**SOURCE:** Dominican University, Susan Roman, Project Coordinator, 708-524-6986; sroman@dom.edu; www.gslis.dom.edu.

## 31M Students Eat School Lunches Each Day

In 2009, more than 31.3 million children received their lunches through the National School Lunch Program, which provides nutritionally balanced, low-cost, or free lunches, according to the U.S. Department of Agriculture.

Of the 5.186 billion meals served to students, 53% of these lunches were provided free and 10% were provided to students at reduced prices.

### CHILDREN WHO RECEIVE THEIR LUNCHES VIA NATIONAL SCHOOL LUNCH PROGRAM, 2007-2009

(in millions)

	2007	2008	2009
Total participation/students	30.5	31.0	31.3
% Free	49%	50%	53%
% reduced price	10%	10%	10%
<b>TOTAL LUNCHES SERVED</b>	<b>5,071.9</b>	<b>5,209.0</b>	<b>5,186.2</b>

**SOURCE:** U.S. Department of Agriculture

**SOURCE:** U.S. Department of Agriculture, Food & Nutrition Service, Julie Paradis, Administrator Food and Nutrition Services, 100 Riverside Pkwy, #906, Fredricksberg, VA, 22406; 703-305-2062; julie.paradis@usda.gov; www.fns.usda.gov.

## Parents Want Private Option To Pay For College

The vast majority of parents see college as a valuable investment in their child's future, and 84% say this is even more the case during the economic recession, according to Ipsos Public Affairs.

Most (83%) worry that the cost of tuition prevents many potential students from having access to a college education. Yet, 58% of parents believe they will be able to afford to pay for college for their child. Those who are concerned about being unable to pay for their child to go to college are more likely to be women (43%), those without a college degree (45%), and those with household incomes of less than \$50,000 a year (52%).

More than six in 10 parents (62%) believe the government is taking an active role in helping to make college more accessible, but few (35%) think the government should be the only institution in charge of student lending. They think private lenders would offer better customer service (60%) and they are more likely to say that private lenders (49%) rather than the government (38%) would be capable of assisting families with applications, default prevention, and financial literacy.

**SOURCE:** "Financing College," Ipsos Public Affairs, Nicolas Boyon, SVP, 1700 Broadway, 15th Fl., New York, NY 10019; 646-364-7583; nicolas.boyon@ipsos.com; www.ipsos-na.com.

## Students and Parents See College As Top Reason For High School

Both parents (42%) and high school students (48%) agree that the primary purpose of high school is to prepare students for college, according to Deloitte and KRC Research. However, only 9% of teachers feel this way. They believe helping students master subjects is more important.

Fewer than three in 10 students (27%) feel "very prepared" for college, with 60% believing they are somewhat prepared, and 12% admitting they are not too prepared.

### PRIMARY PURPOSE OF HIGH SCHOOL, ACCORDING TO STUDENTS AND PARENTS

STUDENTS	PARENTS
Prepare for college..... 48%	Prepare for college .....42%
Learn basic life skills ..... 21%	Teach basic life skills .....34%
Graduate .....18%	Prepare for workforce .....13%
Prepare for workforce .....11%	Graduate .....10%

**SOURCE:** Deloitte, KRC Research

**SOURCE:** Deloitte, Ed Moran, Director Insights & Innovation, 1633 Broadway, New York, NY 10019; 212-489-1600; www.deloitte.com/us/educationsurvey.

## College Costs Up To Me, Say Teens

Three in four teens aged 16-17 (75%) believe it's up to them to fund at least part of their higher education costs, with 44% saying they will contribute 26%-50% of the total costs, according to the College Savings Foundation. Some 43% have already saved between \$1,000-\$5,000 towards college, and another 54% have given up electronic purchases, vacations, and cars in order to amass college funds.

More than half (55%) say costs will be a factor in their choice of college, and 28% admit college funding has created anxiety in their household.

**SOURCE:** "How Youth Plan To Fund College," College Savings Foundation, Kathy Hamor, 1050 17th St., NW, #1000, Washington, DC 20036; 202-223-2631; khamor@collegesavingsfoundation.org; www.collegesavingsfoundation.org.

## Applicants Eye 'Financial Aid Safety Schools'

The number of college applicants who are applying to "financial aid safety schools" jumped to 51% from 34% this year, according to the Princeton Review. Otherwise, applicant's reasoning when choosing schools to apply to remains relatively similar to last year's concerns. Two in three (68%) report the economic downturn has impacted their college decisions and 86% say financial aid will be "very necessary," both only 1% higher than 2009.

Stanford and Harvard are the two top "dream" colleges for students for the second year in a row. New York University bumps Columbia for third place. Parents prefer Stanford, Princeton, and Harvard, the same three as last year, but Harvard was their top pick.

Students and parents still differ on distance; 54% of parents hope their child's college is located no more than 250 miles from them, up from 53% last year. The largest number of students (64%) prefer colleges more than 250 miles away, compared to 65% who said the same in 2009.

**SOURCE:** Princeton Review, Harriet Brand, Communications, 2315 Broadway, New York, NY 10024; 212-874-8282, x1091; www.princetonreview.com.

## factoids

- **College students** spend an average of \$667 per year on course materials, including books and supplies. (*National Association Of College Stores; phone: 800-622-7498, x2351*)
- Some 4.6 million adults were enrolled in at least one **online course** in Fall 2008 — the most recent year for which data are available — an increase of 17% from the prior year. (*Sloan Consortium; phone: 781-239-4549*)
- More than three quarters of students aged 16-17 (77%) say that the **cost of college tuition** will influence their future education plans, with 22% expecting to pay for a portion of their education. (*College Savings Foundation; phone: 202-223-2631*)
- Graduating seniors are most commonly worried about being unable to afford to attend the college of their choice, if accepted (39%); 51% of students applied to “financial aid safety school” — which they expected would grant them more assistance — due to the recession. (*The Princeton Review; phone: 212-539-1350*)
- Nearly six in 10 **college students** (58%) believe that technology helps them to engage with coursework and learning; the tools students prefer most are websites, communication tools, digital homework tools, and static digital content. (*Cengage Learning; phone: 203-965-8634*)
- The vast majority of Americans (88%) had a **teacher** that had a significant positive impact on their lives, and 87% wish they had told that teacher how much they meant to them. (*ING; phone: 770-980-5715*)
- Nearly three quarters of college students (74%) prefer printed rather than digital **textbooks**, which may explain why digital textbooks account for only 2-3% of textbook sales. (*National Association of College Stores; phone: 800-622-7498, x2351*)
- College students spend an average of \$667 per year on **books and supplies** for classes, with 35% of that total going to used books. (*National Association of College Stores; phone: 800-622-7498, x2351*)
- More parents are saving for their child’s **college education** in 2010 than did in 2009 (65% vs. 59%), and fewer expect their child to pay for a portion of his or her education (60% vs. 68%). (*College Savings Foundation; phone: 202-223-2631*)
- More than nine in 10 companies with **internship programs** (92%) plan to hire interns during the coming year, and 83% say that the primary purpose of the program is to feed their full-time hiring programs. (*National Association of Colleges and Employers; phone: 800-544-5272*)



# emerging majorities & cultural values

Although emerging majorities were among the hardest hit financially during the recession, they remain optimistic about their futures. They are reassured having a member of their own in Barack Obama in the White House. Most get their financial advice from friends and family, but feel they could use professional assistance in getting back on track following the recession.

Emerging majorities are young, which means many feel they have time to make up for any losses they suffered during the recession, which contributes to their sense that anything can happen for them in their future.

Their youth contributes to their self-image as trendsetters. They express their personal style through fashion, which may explain why they are more likely than Whites to say online shopping is an entertaining activity. They edit their wardrobes frequently, adding new pieces and getting rid of out-of-date items.

## The Demographics Of Consumer Spending: Cultural Influences

Whites and Asians have the largest incomes, and generally have more disposable income than Hispanics or Blacks to spend on consumer goods and services. However, culture and lifestyle factors introduce variations in spending by category, according to data from New Strategist *Who's Buying* series based on Bureau of Labor Statistics cited in the *2010 Retail Business Market Research Handbook*, available from RESEARCH ALERT parent EPM Communications.

Asians and Hispanics, for example, outspend other races/ethnicities on groceries (see chart below). Both cultures favor cooking with fresh ingredients, some of which are exotic and can be more expensive than common canned or frozen ingredients. In addition, Hispanics tend to have larger households that include extended family members, driving up their grocery bills.

Asians outspend other races/ethnicities in the consumer electronics category. This is a cultural difference: many Asian countries are leaders in technology, and their higher-than-average spending may be to keep up with the trends they hear about from their homelands.

Non-Hispanic Whites and Asians dominate spending on jewelry, a category that is largely dependent on having disposable income.

Hispanic spending on toys and games and sporting goods is second only to Non-Hispanic Whites. Hispanic families have more children than families of other races/ethnicities. In addition, Hispanics are the youngest ethnic group and are more likely to be in the early stages of starting a family, when spending on toys and games is at its highest.

ANNUAL CONSUMER SPENDING, BY PRODUCT CATEGORY, BY RACE/ETHNICITY

	ASIAN	BLACK	HISPANIC	WHITE, NON-HISPANIC
Apparel				
Men's apparel	\$456	\$266	\$450	\$351
Women's apparel	\$712	\$529	\$662	\$639
Consumer electronics				
Televisions	\$167	\$63	\$125	\$142
Sound components, other equipment, and accessories	\$90	\$21	\$39	\$35
Groceries	\$3947	\$2796	\$3719	\$3470
Household furnishings and housewares	\$1839	\$1089	\$1504	\$2033
Jewelry	\$169	\$57	\$61	\$149
Pet supplies	\$33	\$19	\$20	\$66
Sporting goods	\$24	\$31	\$55	\$63
Toys, games, and hobbies	\$64	\$52	\$66	\$95
Videogames	\$40	\$31	\$30	\$35

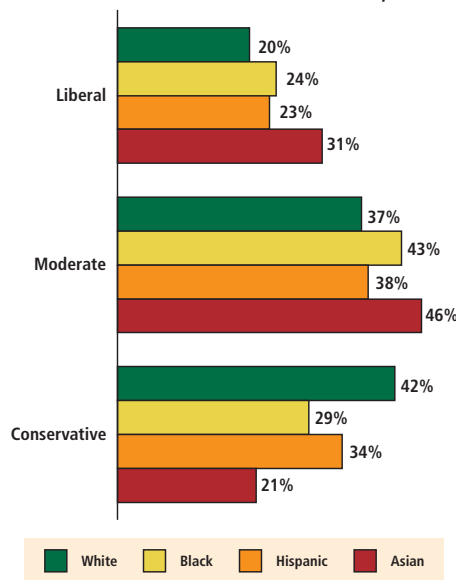
SOURCE: New Strategist, as cited in the 2010 Retail Business Market Handbook

SOURCE: "2010 Retail Business Market Handbook," Richard K. Miller & Associates, available from EPM Communications, 19 W. 21st St., #303, New York, NY 10010; 212-941-0099; info@epmcom.com; www.epmcom.com. Price: \$335 for subscribers to any EPM newsletter, \$385 for non-subscribers.

## Emerging Majorities Vote Democrat

Emerging majorities are more likely than Whites to identify themselves as Democrats or Democrat-leaning, notes Gallup Poll. Blacks demonstrate the widest split, with 83% identifying with Democrats and 8% Republicans. More than twice as many Asians identify with Democrats (61%) than Republicans (24%), as do Hispanics (53% vs. 21%). It is nearly an even split among Whites, 43% of whom identify with Democrats and 45% with Republicans.

AMERICANS' POLITICAL IDEOLOGY, BY RACE, 2009



SOURCE: Gallup Poll

SOURCE: "Gallup Daily Tracking Survey," Gallup Poll, Jeffrey Jones, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.galluppoll.com. Price: Available online at no charge.

## Inequality Persists Between Emerging Majorities And Whites

The Black-White equality index stands at 71.8% in 2010, a slight uptick from the revised 2009 measure of 71.2%, according to the National Urban League. The index is calculated by merging indices for civic engagement, economics, education, health, and social justice. For the first time in 2010, the National Urban League also calculated a Hispanic-White equality index, which stands at 75.5%.

**Civic engagement.** Blacks posted a significant increase in civic engagement in 2010 (102.2% vs. 97.6% in 2009). The increase is attributed to Blacks' rising interest in politics following the election of Barack Obama. Hispanic civic engagement rated 71.9%.

**Economics.** Although Blacks lost ground in equality in terms of median household income, unemployment among Blacks did not rise as much as it did among Whites. Therefore, the economic equality index held steady at 57.4%.

Among Hispanics, economics measures 61.0%, the greatest source of inequality.

**Education.** The Black-White index rose slightly to 77.6% in 2010, despite fewer blacks aged 18-24 enrolling in college than in 2009 (84% vs. 90%). Among Hispanics, the inequality is slightly greater (76.5%) largely due to their high high school dropout rate.

**Health.** The index for this category was largely unchanged compared to 2009, standing at 77.0%. The Hispanic-White index is at 75.5%. The disparity is driven by higher rates of obesity and lower rates of health insurance among both Blacks and Hispanics.

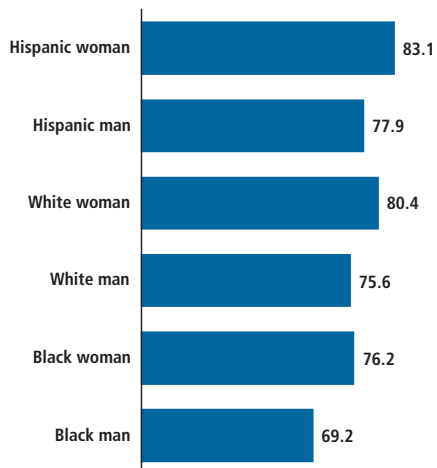
**Social Justice.** The greatest inequality between Blacks and Whites is social justice (57.1%), and it is the second-greatest source of disparity between Hispanics and Whites (62.4%). The measure of inequality is driven by much higher rates of incarceration for Blacks and Hispanics.

**SOURCE:** "State of Black America," The National Urban League, Rhonda Spears Bell, SVP Marketing & Communications, 120 Wall St., New York, NY 10005; 212-558-5300; rspearsbell@nul.org; www.nul.org. Price: \$20.10.

## The Hispanic Population Is Young And Will Live Long Lives

The Hispanic population had the lowest median age (27.4 years) compared to other racial/ethnic groups in 2006 — the most recent year for which data is available — and Hispanics also will live longer than other Americans, according to the Centers for Disease Control and Prevention. Hispanics can expect to live to an average age of 80.6 years, compared to an average age of 78.1 years for Whites and 72.9 for Blacks. These statistics will help tip the population scales in the future as Hispanics continue to grow as a significant portion of the U.S. population.

AVERAGE LIFE EXPECTANCY FOR AMERICAN MEN AND WOMEN, BY RACE/ETHNICITY, 2010



**SOURCE:** Centers for Disease Control and Prevention

**SOURCE:** "United States Life Expectancy By Hispanic Origin," Centers for Disease Control and Prevention, National Center for Health Statistics, 3311 Toledo Rd., #2217, Hyattsville, MD 20782; 301-458-4901; nhis@cdc.gov; www.cdc.gov/nchs. Price: Available online at no charge.

## Hispanics' Financial Concerns And Expectations For The Next Generation

Most Hispanic parents expect their children to attend college, while only 43% say their own parents expected as much of them, according to Univision and the Associated Press. The vast majority want their daughters to attend a four-year college (74%) or community college (9%) after high school, compared to 6% who think she should get a job and 1% who think she should get married. Most also want their sons to attend a four-year college (71%) or community college (7%), compared to 9% who think they should get a job and 1% who think they should get married.

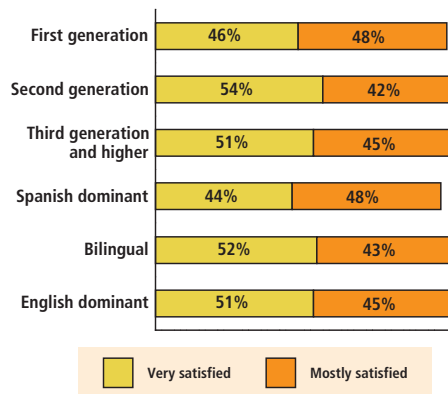
Hispanic parents believe that it will be easier for the next generation to find a good job (57%) and buy a house (51%). They are less optimistic about raising a family in the future, with 43% believing their children will have an easier time than they did and 36% saying it will be more difficult.

**SOURCE:** "Hispanic Poll," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; www.surveys.ap.org.

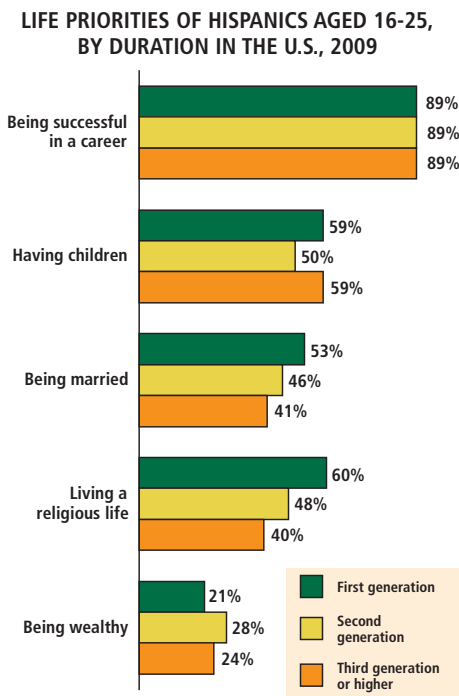
## Young Hispanics Optimistic About Their Futures, Despite Challenges

Many young Hispanics in the U.S. have difficult lives, according to Pew Hispanic Center. Some 26% of Hispanic women aged 19 are mothers, compared to 22% of Blacks and 11% of Whites. One in six Hispanics aged 16-25 (17%) have dropped out of school, compared to 9% of Blacks and 6% of Whites. Nearly a quarter of 16-25-year-old Hispanics (23%) live in poverty, which is less than Blacks (28%), but nearly

LIFE SATISFACTION AMONG HISPANICS AGED 16-25, BY DURATION IN THE U.S. AND ENGLISH PROFICIENCY, 2009



**SOURCE:** Pew Hispanic Center



SOURCE: Pew Hispanic Center

double the proportion of Whites (13%). Fewer than half of foreign-born young Hispanics (47%) are proficient in English. Four in 10 native-born young Hispanics (40%) know someone in a gang.

Despite their trials, however, 50% of young Hispanics are very satisfied with their lives, and another 45% are mostly satisfied. Their degree of satisfaction increases as their proficiency in English grows and the longer their family has been in the U.S.

Nearly three quarters (72%) expect to be better off financially than their parents, including 74% of second-generation young Hispanics and 78% of those who are third generation or higher. Most young Hispanics say it is very important to them to be successful in their careers and to raise a family. Their priorities vary by generation.

SOURCE: "Between Two Worlds: How Young Latinos Come Of Age In America," Pew Hispanic Center, Paul Taylor, Director, 1615 L St. NW, #700, Washington, DC 20036; 202-419-4300; info@pewsocialtrends.org; www.pewsocialtrends.org. Price: Available online at no charge.

## The Black Consumer: Optimistic, Stylish, And Media Savvy

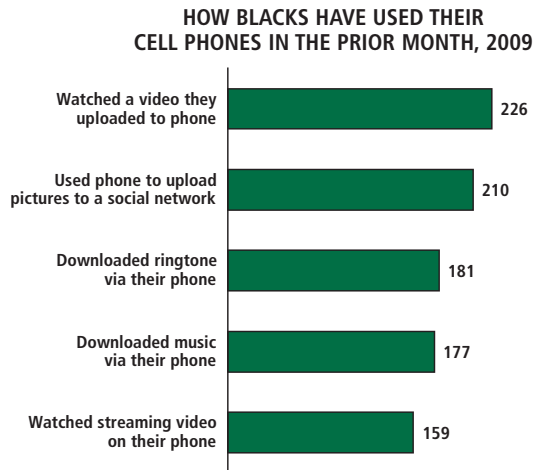
Nearly four in 10 Black adults (36%) believe they will be better off financially in the next year than they were in the prior year, according to Experian Simmons.

Black consumers are more than twice as likely as the average American to be among the first to try new clothing styles (index of 206). They like to make a unique fashion statement (197), though they claim that others often copy what they

wear (167). They are more likely than average to forego wearing clothes purchased the year prior because they feel they are no longer stylish.

When it comes to shopping, Blacks are more likely than average to be the first among their friends to shop at a new store (189), and they go out of their way to find new stores to shop at (186).

Blacks are particularly cell phone savvy: they are more than twice as likely as other Americans to watch video they have uploaded to their cell phones and to post pictures to social networking sites via their phones.



NOTE: An index of 100 represents the average, so an index of 226 indicates that Blacks are 126% more likely than average to watch a video via cell phone.

SOURCE: Experian Simmons

SOURCE: "African American 2010 Consumer Report" (compiled from "DataStream," "National Consumer Study," and "New Media Study"), Experian Simmons, Eileen Merken, Director Analytics, 1501 SW FAU Research Park Blvd., #100, Deerfield Beach, FL 33441; 954-246-8220; eileenm@smrb.com; www.smrb.com. Price: Call for information.

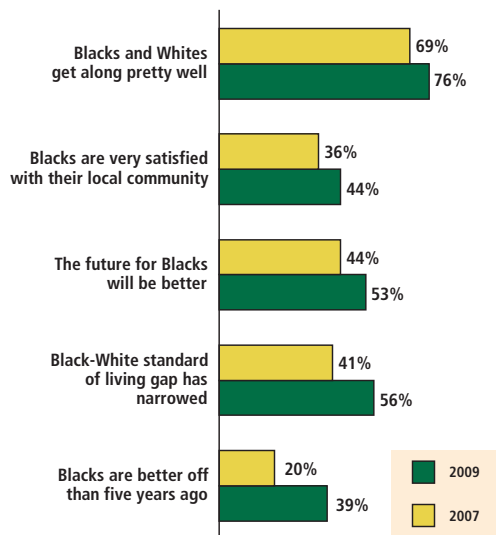
## Blacks Are Positive About Their Future Following Obama Election

Nearly four in 10 blacks (39%) believe they were better off in 2009 than they were five years ago, compared to 12% who think they are worse off, according to the Pew Research Social And Demographic Trends Project. In addition, 53% of Blacks believe their situation will improve in the coming five years, compared to 10% who believe it will be worse.

Both Blacks (60%) and Whites (70%) think that the values of their two racial groups have become more similar in the past 10 years. They also believe the gap in their standards of living has narrowed (56% of Blacks and 65% of Whites). However, Blacks' annual household income is only 62% that of Whites', a smaller proportion than it was in 2000 (65%).

Most Blacks (52%) say that Blacks who cannot get ahead are responsible for their own situation, compared to 34% who think it is the result of racism.

**BLACKS' OPINIONS ABOUT THEIR SITUATION IN THE U.S., 2009 VS. 2007**



SOURCE: Pew Research Social And Demographic Trends Project

SOURCE: "A Year After Obama's Election: Blacks Upbeat About Progress, Prospects," Pew Research Social and Demographic Trends Project, Paul Taylor, Project Director, 1615 L St. NW, #700, Washington, DC 20036; 202-419-4300; info@pewsocialtrends.org; www.pewsocialtrends.org. Price: Available online at no charge.

**Black Americans Are A Diverse, Digitally Savvy Group**

The Black population in the U.S. increased 10% between 2000 and 2008, while their buying power increased 55% during that same period to top \$913 billion, according to statistics cited in a recent BET study. The study finds that nearly a third of their discretionary spending (31% or \$39 billion) is on tech devices, such as computers, cell phones, and other electronics.

Blacks spend an average of 18 hours a week online, exceeding the amount of time they spend watching TV (15 hours). The vast majority go online via a PC (93%) and 76% via cell phone. Most (60%) have downloaded music, a TV show, a movie, or ringtone in the prior month. Half (50%) regularly update or access a social network account.

Black Americans can be segmented into distinct groups by their behavioral and attitudinal characteristics:

- ▶ Srivers range in age from late-20s to early-40s and are adventurous, fashionable opinion leaders intent on climbing the corporate ladder.
- ▶ Conscious Sisters are selfless women who are spiritual and highly connected to their culture.
- ▶ Tech-Fluentials are digitally savvy and think globally.
- ▶ Bright Horizons are young high school or college students who are into technology and electronic gadgets.
- ▶ Inner Circle Elites are predominantly working women

with deep connections to their ancestral, spiritual, and cultural roots.

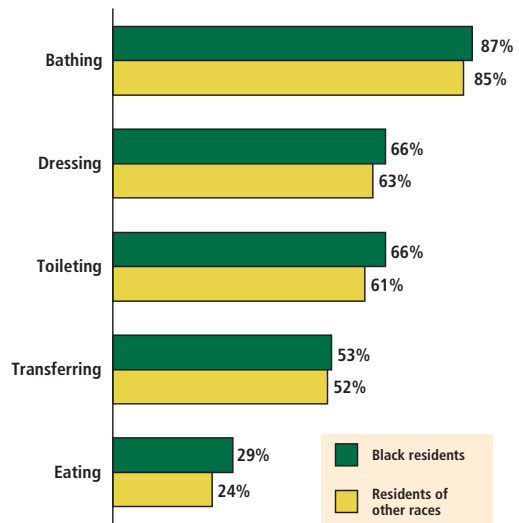
- ▶ Urban Dreamers are young city-dwelling adults who are highly social trendsetters intent on living their lives to the fullest.
- ▶ Survivors are primarily young men working hard and taking some risks to maintain a modest living.

SOURCE: "African Americans Revealed," BET, Michelle Bailey, Market Research, 1235 W St. NE, Washington, DC 20018; 202-608-2000; www.bet.com. Price: Call for information.

**Blacks In Nursing Homes Need More Care**

Blacks account for 11% of nursing home residents, according to the Centers for Disease Control and Prevention. Black nursing home residents (59%) are more likely than those of other races (51%) to be dependent on others for all five daily living tasks — dressing, bathing, toileting, transferring, and eating.

**NURSING HOME RESIDENTS WHO ARE DEPENDENT ON OTHERS FOR DAILY LIVING TASKS**



SOURCE: Centers For Disease Control & Prevention

SOURCE: "Racial Differences In Functioning Among Elderly Nursing Home Residents," Centers for Disease Control And Prevention, National Center for Health Statistics, 3311 Toledo Rd., #2217, Hyattsville, MD 20782; 301-458-4901; nhis@cdc.gov; www.cdc.gov/nchs. Price: Available online at no charge.

**Getting To Know Asian Americans**

The vast majority of Asian Americans (83%) have Internet access at home, compared to 71% of Blacks and 59% of Hispanics, reports InterTrend. Korean-Americans are the most likely segment of Asians to have Internet access at 91%.

More than half of Asians (57%) prefer to wait for sales before making a purchase. Women (65%) are more likely than men (49%) to say so.

Asian-Americans' beverage preferences are as diverse as

their countries of origin. More than six in 10 Asian Indians (62%) drink tea at least once a day, compared to 42% of Chinese-Americans. Nine in 10 Vietnamese-Americans (90%) drink bottled water daily, compared to 37% of Chinese-Americans.

**SOURCE:** "Asian American Consumers," InterTrend, Jane Nakagawa, VP Strategy, 555 E. Ocean Blvd., 9th Fl., Long Beach, CA 90802; 562-733-1888; info@intertrend.com; www.intertrend.com. Price: Call for information.

## factoid

► **Spanish** is spoken at home by 34.5 million Americans, making it the most common language other than English; Chinese is spoken by 2.5 million, and Tagalog is spoken by 1.5 million. (*U.S. Census Bureau; phone: 301-763-3030*)

## Social Activities Of Older Americans

The social activities of Americans aged 45 and older vary widely by race/ethnicity, according to the AARP. For example, participating in religious or spiritual activities is most popular among both Blacks and Hispanics, but ranks third among Whites. In addition, the proportion participating varies, with most Blacks active in their religious or spiritual communities (53%), compared to 31% of Whites and 30% of Hispanics.

**SOCIAL ACTIVITIES OF AMERICANS  
AGED 45 AND OLDER, BY RACE/ETHNICITY, 2009**

	BLACK	HISPANIC	WHITE
Religious or spiritual activities	53%	30%	31%
Entertaining and visiting friends	30%	19%	32%
Hobbies and leisure pursuits	26%	21%	35%
Volunteer work	23%	15%	19%
Sports, athletics, and fitness activities	18%	23%	21%
Neighborhood issues	15%	7%	9%
Education	14%	9%	7%
Politics	10%	5%	5%
State/national issues	7%	4%	3%

**SOURCE:** AARP

**SOURCE:** "Connecting and Giving," AARP, Alicia Williams, Analyst, 601 E St. NW, Washington, DC 20049, 202-434-6186; awilliams@aarp.org; www.aarp.org. Price: Available online at no charge.

# entertainment / media

Americans remain budget conscious as the economy slowly recovers from the recession, and entertainment continues to be a common item consumers say they are cutting back on. However, that does not mean that they are spending less time with entertainment and media, but that they are finding ways to get it cheap or free.

Young and multicultural adults are rapidly embracing non-traditional video viewing because they spend more time than average accessing media outside the home and also because they are more knowledgeable about technology and electronic devices than their older peers.

Accessing video via alternative screens has not significantly diminished the time Americans spend with traditional TV.

DVR, video on demand, and online streaming video allow users to time-shift TV programs, and each medium is growing in usage among Americans. While the Web offers a convenient (and often free) means to time-shift, Americans most commonly prefer to watch via DVR or video-on-demand because the program is automatically delivered to their TV rather than a computer.

The Internet continues to be a key entertainment and information medium, particularly among young adults. They go online to catch up on news and culture. Americans are increasingly streaming video and radio from websites. YouTube is still a dominant video site, but as people become more comfortable accessing long-form content online, sites such as Netflix and Hulu are growing in popularity.

Americans are becoming more comfortable paying for digital content as they have successfully bought and downloaded everything from music to TV shows to mobile apps. Trust is an important factor in consumers' digital media purchases — they feel safer and spend more buying from a company they are confident will deliver what they want.

Newspapers continue to struggle as consumers get their news online, on TV, or even from friends sharing tidbits and links on Facebook. The number of people who read a daily newspaper is shrinking, and nearly half of Americans do not think newspapers will exist in the future because they will become irrelevant.

## Entertainment = Expensive, Say Consumers

Three quarters of moviegoers (75%) think movie tickets are too expensive. In addition, 37% bring snacks from home to avoid the high price of concessions at the theater.

Two thirds of concert goers (67%) think concert tickets are too pricey as well. That may explain why so few Americans attend concerts: 39% never go, 34% go to one show a year, 17% attend several concerts, and only 8% go once a month or more.

### AMERICANS' FAVORITE MOVIE GENRES, 2010

Comedy	30%
Drama	28%
Action	13%
Science fiction	11%
Horror	6%
Musical	3%
Other	4%
Not sure	6%

SOURCE: Rasmussen Reports

### AMERICANS' FAVORITE MUSIC CONCERT GENRES, 2010

Rock or pop	32%
Country	24%
Classical	16%
Other	18%
Not sure	4%

SOURCE: Rasmussen Reports

**SOURCE:** "Concert Tickets" and "Movie Tickets," Rasmussen Reports, Scott Rasmussen, President, 625 Cookman Ave., Asbury Park, NJ 07712; 732-776-9777; info@rasmussenreports.com; www.rasmussenreports.com. Price: Toplines available online at no charge, detailed findings available for a fee.

"On Demand TV 2010: A Nationwide Study On VOD And DVRs," Leichtman Research, Bruce Leichtman, President, 3 Ellison Ln., Durham, NH 03824; 603-397-5400; info@leichtmanresearch.com; www.leichtmanresearch.com. Price: Call for information.

## Americans Buy Digital Media For Instant Access

Some 39 million Americans have paid to download music and 43 million have legally downloaded free music, according to Lightspeed research. In addition, 35 million have paid to download a TV show or film, and 51 million have legally done so for free. By comparison, 29 million have downloaded music from a peer-to-peer network, and 21 million have downloaded a TV show or film.

Those who have paid to download a TV show or film say the primary reason was to get instant access to the content (42%) and 16% say it was the only way they could get it. Similarly, 49% of those who paid to download music did so for instant access, and 17% because it was the only way they could get it. By comparison, those who downloaded film and TV illegally did so primarily because it saved them money

(45%) and gave them instant access (34%). Those who downloaded music illegally did so more for the cost savings (63%) than for instant access (26%).

**SOURCE:** "Streaming Is Destroying Piracy," Lightspeed Research, 180 Mount Airy Rd., #100, Basking Ridge, NJ 07920; 908-630-0542; info@lightspeedresearch.com; www.lightspeedresearch.com. Price: Call for information.

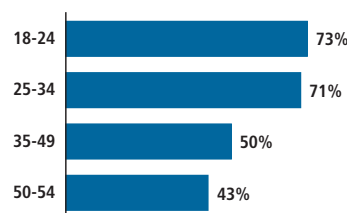
## Americans Are Willing To Pay For Digital Content They Trust

Television continues to be the first place most Americans (58%) look for entertainment, followed by the Internet (32%), according to Edelman. Among those aged 18-34, the proportion who first turn to the Internet for entertainment rises to 42%. Half of Americans (50%) consider social networks as a form of entertainment, and that proportion is higher among younger groups.

Americans spend an average of \$47 per month of entertainment content. Their willingness to spend on digital content hinges on trust. Only 23% of Americans trust entertainment companies — their evaluation of trust is most impacted by quality (65%) and pricing (65%). Those who trust entertainment companies spend an average of \$49 per month, compared to \$43 for those who don't trust them. In addition, 37% of the trusting type are spending more on entertainment than they did a year ago, compared to 31% of the population overall.

Those aged 18-24 are most likely to trust entertainment companies, and at 34%, their trust is at a three-year high.

### ADULTS WHO CONSIDER SOCIAL NETWORKS ENTERTAINMENT, BY AGE, 2010



SOURCE: Edelman

**SOURCE:** "Trust in the Entertainment Industry Survey," Edelman, Gail Becker, President Western Region, 5670 Wilshire Blvd., 22nd Fl., Los Angeles, CA 90036; 323-202-1037; gail.becker@edelman.com; www.edelman.com. Price: Call for information.



## The Next American Idol: Celine Dion?

Celine Dion hasn't topped the charts in a while, but she is tops in Americans' hearts, according to Harris Interactive. More Americans named her (unprompted) as their favorite singer, musician, or band. She is #1 among women overall, married women, Democrats, those aged 65 and older, and those living in the East region. U2, the second most popular, is #1 among men, Republicans, Gen Xers (aged 34-45), and those living in the West.

### AMERICANS' FAVORITE MUSICAL ACTS, 2010

(Unprompted responses)

1. Celine Dion
2. U2
3. Elvis Presley (tie)
3. Beatles (tie)
5. Tim McGraw
6. Lady Gaga
7. George Strait
8. Rascal Flatts
9. Alan Jackson (tie)
9. Frank Sinatra (tie)

**SOURCE:** Harris Interactive

**SOURCE:** "Favorite Singer/Musician Or Band," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

## Rising And Falling Stars: Sports Figures In America

Shaun White is one of the most well-liked athletes in the U.S., with 41% of sports fans having a positive opinion of him, according to The Q Scores Company. Fans' opinion of him rose 64% following his gold medal performance at the Vancouver Olympics. Only 14% of sports fans have a negative opinion of him. The mean positive Q Score for athletes is 16%, and the mean negative is 27%.

Drew Brees is another athlete who has seen his score rise following a winning performance at the Super Bowl. One quarter (25%) of sports fans viewing him positively, up from 14% prior to the event. Only 13% of fans view him negatively.

Meanwhile, personal discretions have negatively affected the Q Scores of Tiger Woods and Ben Roethlisberger in the past year. Fewer than one in five fans viewed Roethlisberger positively (19%) in March 2010, down from 23% in March 2009, whereas 31% viewed him negatively, up from 20% over the same period. Three in 10 (30%) viewed Woods positively, down from 44% in March 2009, while 39% viewed him negatively, up from 15%.

Ego can also affect a sports figure's image. Among the general public, LeBron James's Q Score fell in September 2010, with only 14% of people viewing him in a positive light following his decision to leave his hometown team. That's down from 24% who had viewed him positively prior to his

move. Nearly four in 10 (39%) view him negatively following the move, up from 22%.

**SOURCE:** "Sports Q," The Q Scores Company, Steven Levitt, President, 1615 Northern Blvd., Manhasset, NY 11030; 516-365-7979; steven.levitt@qscores.com; www.qscores.com. Price: Call for information.

## Cross-Platform Video: Viewers Watch More Video And Are More Engaged With The Programs They Watch

Among the key issues that pervaded the Advertising Research Foundation's annual meeting, themed "The New Normal," was the cross-platform entertainment consumer. A growing number of Americans are using devices other than TV to view video. They have little problem watching on their laptop, and even their mobile devices.

While two thirds of Americans are TV set-only video viewers, 29% watch video both online and on TV sets, and 6% watch only online, according to Tania Yuki of comScore. Who are these cross-platform viewers? They skew young, but not as young as one might think. The largest proportion (32%) are aged 35-49. That age group is particularly split in their viewing habits — they also account for the largest proportion of TV set-only viewers (35%).

Viewers prefer to watch certain genres on TV — sports (52%), news (42%), drama (49%), and comedy (44%) — and they do not care on which medium they watch lifestyle (49%), celebrity (50%), or reality programs (50%). Online is not the preferred medium for any genre of video.

They like to watch on TV because it provides better picture quality (75%), offers better sound (72%), allows them to

watch shows as they are released (69%), and for the overall experience (68%). They like online video because they can watch it whenever they want (75%) and on their own schedule (74%), they can play and pause programs when they want (70%), shows have fewer commercials (67%), and for its overall convenience (61%).

The reasons cross-platform viewers choose to watch video online are:

- ▶ They missed an episode on TV (71%);
- ▶ It is convenient (57%);
- ▶ It has fewer ads (38%);
- ▶ They like to see past episodes (25%);
- ▶ They prefer the online experience (13%); and
- ▶ They do not subscribe to cable or do not have a TV (2%).

Watching online is a solution not only for those who have missed an episode of a show they follow, but it is also a resource for those who started watching a show in the middle of a season and want to go back to catch episodes they missed.

Of those who watch online, online only viewers are more likely than cross-platform viewers to watch the most recent episode (35% vs. 25%) and to save up episodes to watch several in succession (37% vs. 34%), whereas cross-platform viewers are more likely than online-only viewers to watch single episodes to catch up with a show (41% vs. 28%).

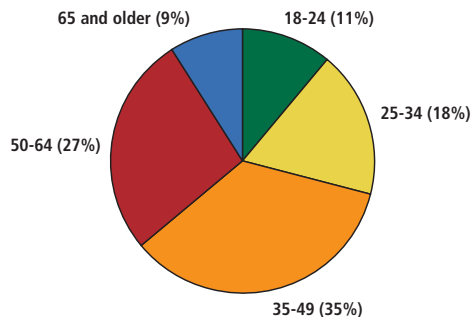
Cross-platform viewers watch more video than average viewers — 80% watch one additional episode per week than other viewers, and 20% watch six or more additional episodes. Some 28% of cross-platform viewers discover shows from an online video site, such as Hulu or TV.com. Two in 10 (20%) think that if they had not heard of the show in that way, they never would have discovered it. Of those who learned about shows online, 22% continue to watch the show online, 21% switch to watching on TV, and 57% use a mixture of both media.

It is a myth that those who view online do so specifically to skip commercials. While some online video viewers do skip commercials, more than 30% of those who watch online and never watch commercials have stopped a program they were watching to visit an advertiser's website.

NBC's Billion Dollar Lab found that the more screens the consumer has to watch video, the greater their viewership and engagement, Alan Wurtzel said at the ARF meeting. The lab conducted an in-depth study of TV, online, and mobile media during the Olympics. Americans went out of their way to follow the games, with 46% changing their daily routines, including 63% who stayed up later to watch.

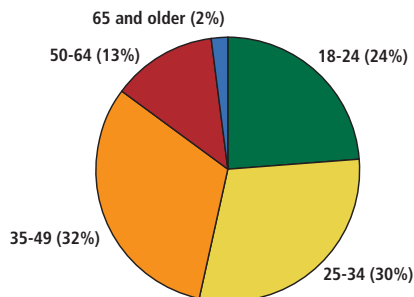
Americans not only used multiple media sources to follow the games, they used them simultaneously. A third (32%) used TV and Internet at the same time — both media tuned to Olympic coverage. That included 36% of 18-34 year olds, 30% of 35-49 year olds, and 34% of those aged 50 and up. There was also little difference by gender (52% were men, and 48% were women).

AGE DISTRIBUTION OF TV SET-ONLY VIDEO VIEWERS, 2010



SOURCE: comScore

AGE DISTRIBUTION OF CROSS-PLATFORM VIDEO VIEWERS, 2010



SOURCE: comScore

While they were watching TV, they went online to check the medal count (49%), check scores (49%), view video highlights or clips (29%), and stream live events (16%).

Those who used both TV and Internet consumed 91% more Olympic coverage than those who followed on TV alone. Engagement was also up, with 92% of TV and Internet users saying they were more into the games than in the past, compared to 65% of TV-only users.

Nearly half of those who followed the games (49%) used TV and mobile media at the same time. Mobile users accounted for 2 million video streams, up 564% over the Beijing games 18 months earlier. The platform was also relatively age-agnostic, with those aged 50 and older accounting for 27% of mobile users.

NBC offered both a smartphone app and a WAP (mobile-formatted web page) for mobile users, and found that the app was used far more. Two thirds of app users said it made them more involved in the games.

Wurtzel noted that consumers are becoming more comfortable with using alternative sources for video content. Slightly more than half of those who used Internet to follow the Vancouver games (52%) had not done so during the Beijing games, and 70% of those who used WAP had not done so during the Beijing games.

The data show offering additional sources of video does not cannibalize TV usage, but provides viewers with a more engaging experience that they can tailor to their own needs. In addition, three-screen consumers — who cross age ranges and are not ad avoiders — are here to stay and becoming more comfortable with watching video wherever and whenever they can.

#### VIEWERSHIP OF COMMERCIALS, BY MEDIUM, 2010

	ON TV		ONLINE	
	TV SET- ONLY VIEWERS	CROSS- PLATFORM VIEWERS	ONLINE ONLY VIEWERS	CROSS-PLATFORM VIEWERS
Always	6%	9%	5%	9%
Most of the time	16%	23%	22%	14%
Sometimes	40%	39%	35%	37%
Rarely	31%	23%	18%	29%
Never	2%	6%	21%	30%

SOURCE: comScore

**SOURCES:** comScore, Tania Yuki, Director Video and Cross Media Products, 5 Penn Plaza, New York, NY 10001; 212-497-1700; tyuki@comscore.com; www.comscore.com. Price: Call for information.

NBC Universal, Alan Wurtzel, President Media & Research Development, 30 Rockefeller Plz., New York, NY 10112; 212-664-7565; alan.wurtzel@nbcuni.com; www.nbc.com.

## Video Viewing The Modern Way: Influences Of Time-Shifting And Online Video On Television Usage

When it comes to time-shifting broadcast, cable, satellite, or online video, 39% of Americans prefer to view via DVR,

23% have no preference, and 6% prefer to stream video via the Internet (the remaining portion does not view time-shifted video), according to Nielsen Company. That preference carries through across all age groups, with more than 70% of those who view time-shifted video preferring to do so via DVR. Nielsen suggests the preference may be due to the limited availability of legal streaming video programming in the U.S.; in other global regions, streaming is widely preferred to a DVR.

In an examination of four hour-long programs, viewers who watched a program live saw 38% to 45% of the program, while they watched a greater proportion (up to 54%) when they accessed it via DVR or streaming. The researchers surmise that when viewers put in an extra effort to record or access the program online, they are more dedicated to watching it.

The method by which viewers access a program also significantly affects audience retention. The graph of audiences that tune in live is a steady flat line, showing strong audience retention throughout the duration of the program. The graph of those who viewed via DVR — both the same day and a full week after the program had originally aired — was a jagged but steady line, showing audience drop off and reintroduction before and after commercial breaks.

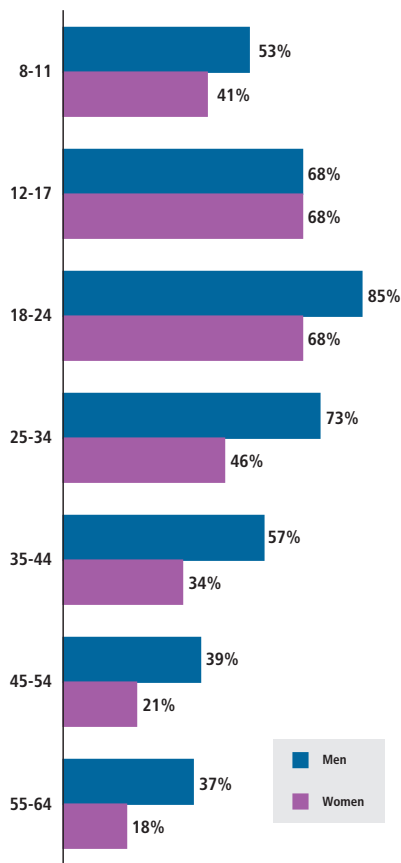
The graph of audience retention for streaming video is a gradually declining slope, with significant drop offs during each commercial break. Unlike DVR audiences, streaming audiences are unable to return to their programs where they left off due to streaming technology, which requires viewers to restart the program from the beginning if they leave during a commercial.

Despite limitations, 24% of households have connected their TV to the Internet via a gaming system, Blu-Ray player, or the set itself, according to Leichtman Research Group. However, just 5% of households that use such devices watch video from the Internet in an average week. Such activity is heavily skewed to young men aged 18-34, 16% of whom watch online video via such devices weekly, compared to 3% of the rest of the population. [Ed note: This broad difference may be attributed to the fact that 18-34-year-old men are more likely than the rest of the population to have a gaming console or Blu-Ray player.]

Americans' usage of online pay-for-video services remains low; only 4% use Netflix's "Watch Instantly" service weekly. Only one in 20 (5%) would be willing to pay \$9.95 to access Hulu's full video library. Similarly, a mere 4% would strongly consider disconnecting their TV in favor of online video services.

Weekly viewing of online video in any capacity — whether via TV set or computer screen — rose to 50% in 2010, up from 43% in 2009, according to Frank N. Magid Associates. In addition, 12% of Americans intend to increase their use of online video in the coming year, compared to 7% who intend to spend less time with it, for a net increase in online video viewership.

WEEKLY VIEWERS OF ONLINE VIDEO, BY AGE AND GENDER, 2010



SOURCE: Frank N. Magid Associates

Those younger than age 45 dominate usage of online video, particularly those aged 18-24 (see chart). Suggesting a strong future potential for online video, 53% of boys aged 8-11 and 41% of girls the same age already watch online video, and about two thirds of 12-17 year olds (68% each of boys and girls) do so as well.

Consumer generated clips are the most popular genre of online video, with 41% of online video viewers watching them. However, 79% regularly watch professionally-filmed online videos, including 40% who watch full-length TV shows and movies. Viewership of web-only programming significantly lags behind viewing of traditional video online.

While Americans are watching online video, they still prefer their TV screen; 38% are interested in connecting their computer to their TV to watch online video. In addition, their use of online video does not affect their viewing live TV; only 14% report spending less time with live TV due to their use of online video, while 10% say they watch more live TV as a result.

The vast majority of TV viewers (89%) are interested in using interactive television applications such as accessing online directories, weather, or financial information; voting

for a reality show; or connecting to a web page to learn more about products featured in a show or commercial, according to FourthWall Media. Two thirds of viewers (66%) believe such services would change the way they view TV. In addition, of the 82% who multitask with their computers while watching TV, 31% expect they would spend less time doing so if they had interactive TV applications.

TYPES OF ONLINE VIDEOS AMERICANS AGED 8-64 WATCH REGULARLY, 2010

Consumer generated videos, such as those on YouTube	.41%
Music videos	.34%
Full-length TV shows	.33%
Movie previews	.33%
News stories	.28%
Full-length movies	.23%
Clips of TV shows	.21%
Weather	.21%
Sports content	.18%
Comedy/jokes/bloopers	.16%
Videogame content	.16%
Adult entertainment*	.14%
TV previews	.12%
Short web originals	.12%
Short films	.11%
TV commercials	.11%

NOTE: Adult entertainment asked only of those aged 18 and older.

SOURCE: Frank N. Magid Associates

SOURCES: "Comparing The Consumption Dynamics Of TV And Online Program Viewing," (presentation at Advertising Research Foundation's Audience Measurement Conference), Nielsen Company, Jon Gibs, VP Analytics, 700 Broadway, New York, NY 10003; 646-654-5000; jon.gibs@nielsen.com; www.nielsen.com. Price: Call for information.

"Emerging Video Services IV," Leichtman Research Group, Bruce Leichtman, President, 3 Ellison Ln., Durham, NH 03824; 603-397-5400; info@leichtmanresearch.com; www.leichtmanresearch.com. Price: Call for information.

"Magid Media Futures 2010," Frank N. Magid Associates, Mike Vorhaus, President Magid Advisors, 1775 Broadway, #1401, New York, NY 10019; 212-974-2310; mvorhaus@magid.com; www.magid.com. Price: Call for information.

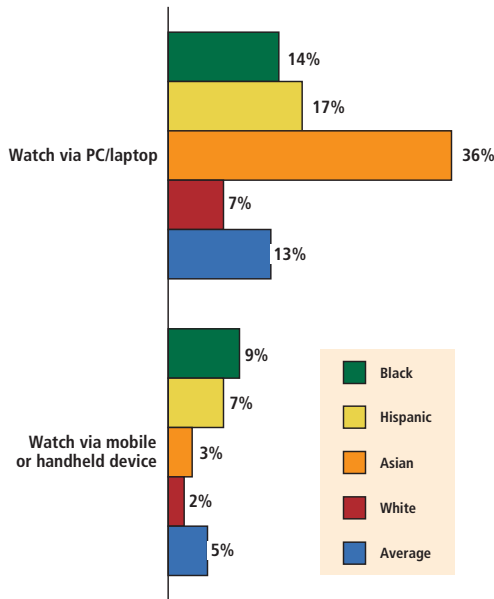
"Interactive Television Applications Survey," FourthWall Media, Ellen Dudar, Chief Product Officer, 5800 Granite Pkwy., #480, Plano, TX 75024; 972-464-5880; edudar@fourthwallmedia.tv; www.forthwallmedia.tv. Price: Call for information.

## Emerging Majorities Embrace Video Via TV, PC, And Mobile

Americans watch an average of 136.5 hours of video on their TV sets, 2.9 hours on their PC, and 1.7 hours on a handheld device each month, according to Horowitz Associates. Among those ages 18-34, TV set viewing (122.1 hours per month) still dominates, but PC (5.9 hours) and handheld viewing (3.1 hours) is making inroads.

Eight in 10 Americans (80%) have a handheld device, but only 35% have video access on it. Emerging majorities —

USE OF PC/LAPTOP OR MOBILE/HANDHELD DEVICE TO VIEW VIDEO, BY RACE, 2010



SOURCE: Horowitz Associates

50% of Asians, 42% of Blacks, and 36% of Hispanics — are more likely than Whites (30%) to have video access on their handheld devices. Therefore, it is little surprising that they are more likely than Whites to watch video on handheld devices. The most popular programs Americans watch on handheld devices include:

- ▶ Music videos (15%);
- ▶ YouTube videos (14%);
- ▶ Movies (10%);
- ▶ Television shows (8%); and
- ▶ Comedy programs (7%).

Emerging majorities are also more likely than Whites to watch video via a PC; most have broadband Internet Access in their homes — 78% of Blacks, 56% of Blacks, and 52% of Hispanics, compared to 78% of Whites. The most popular programs they watch on PC include:

- ▶ TV shows (19%);
- ▶ News segments (17%);
- ▶ Movie previews or trailers (16%);
- ▶ Music videos (14%);
- ▶ Movies (14%);
- ▶ Video segments of sporting events (13%);
- ▶ Previews or segments of TV shows (12%);
- ▶ Previews or segments of sports news (12%); and
- ▶ Children’s programs (9%).

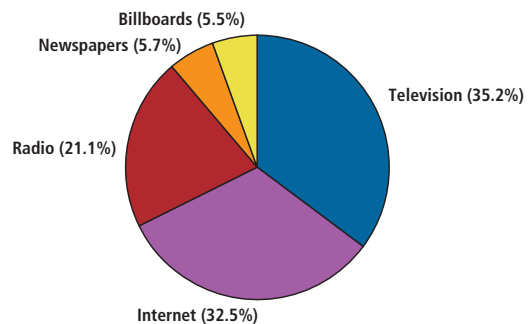
SOURCE: “State of Cable and Digital Media 2010, Multicultural Edition,” Horowitz Associates, Adriana Waterson, VP Marketing and Business Development, 1971 Palmer Ave., Larchmont, NY 10538; 914-834-5999; adrianaw@horowitzassociates.com; www.horowitzassociates.com. Price: \$10,800.

## Blacks Shift Media Time From Television & Radio To The Internet

Blacks spend an average of 13 hours, 24 minutes, per day with media, compared to an average of 11 hours, 33 minutes, for Americans overall, according to The Media Audit. They spend more time online per day than the typical American (4 hours, 21 minutes vs. 3 hours, 57 minutes). Blacks time spent with the Internet has increased dramatically, up from 1 hour, 9 minutes, in 2005.

As a result of their increased time spent online, television and radio account for a diminished share. In 2010, television accounts for 35.2% of the time Blacks spend with media each day, down from 42.9% in 2005. In 2010, radio accounts for 21.1% of the time Blacks spend with media, down from 31.4% in 2005.

SHARE OF DAILY TIME WITH MEDIA BLACKS DEVOTE TO EACH MEDIUM, 2010



SOURCE: The Media Audit

SOURCE: “National Report,” The Media Audit, Robert Jordan, President, 10333 Richmond Ave., #200, Houston, TX 77042; 800-324-9921; rjordan@themediiaudit.com; www.themediiaudit.com. Price: Call for information.

## Media Consumption Varies By Age

Age plays a key role in how someone consumes media, according to Nielsen. Children aged 2-11 primarily spend their time each month watching traditional and time-shifted TV. The time spent using the Internet nearly triples as a child transitions into the teen years.

MONTHLY TIME SPENT USING VARIOUS MEDIA, IN HOURS/MINUTES, 2Q 2009

	2-11	12-17	18-24	25-34
Traditional TV	101:51	101:09	108:49	131:11
Timeshifted TV	5:26	4:54	5:33	10:22
Using the Internet	4:44	10:22	26:09	34:00
Watching video online	1:48	2:41	5:11	4:42
Mobile subscribers viewing video via cell phone	n/a	6:30	3:15	2:10

NOTE: Cell phone data includes only those over age 13

SOURCE: Nielsen

Watching video on the Internet peaks at 18-24. Similarly, mobile subscribers who watch video via a cell phone peaks at 12-17.

**SOURCE:** Nielsen Wire, Chris Quick, Client Services Manager, Mobile Media, 770 Broadway, 14th Fl., New York, NY 10003; 646-654-5000; nielsenwire@nielsen.com; www.nielsen.com.

## American Media Use: At Home, At Work, On The Road, And More

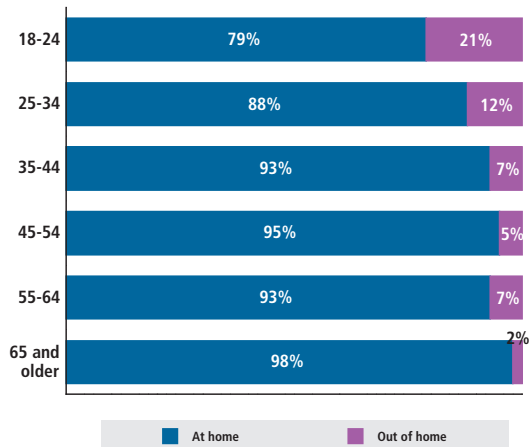
Home use accounts for 74% of Americans' time with media, according to the Center for Research Excellence. Media use while at work and in the car each account for another 8%. The remaining 10% is in other locations, such as bars, restaurants, schools, stores, and other public places.

TV dominates home media use, which is the most fragmented. The computer is king at work, followed closely by audio. Audio accounts for the lion's share of media use in the car. Audio is the most common medium experienced in other locations, however live TV accounts for nearly 20% of that time.

Age significantly impacts media use outside the home. Among 18-34 year olds, a fifth of their time spent with media occurs away from home. Half of that is spent using media at others' homes, and half at their work place or other public locations. Among older adults, most out of home media use occurs at work or public locations.

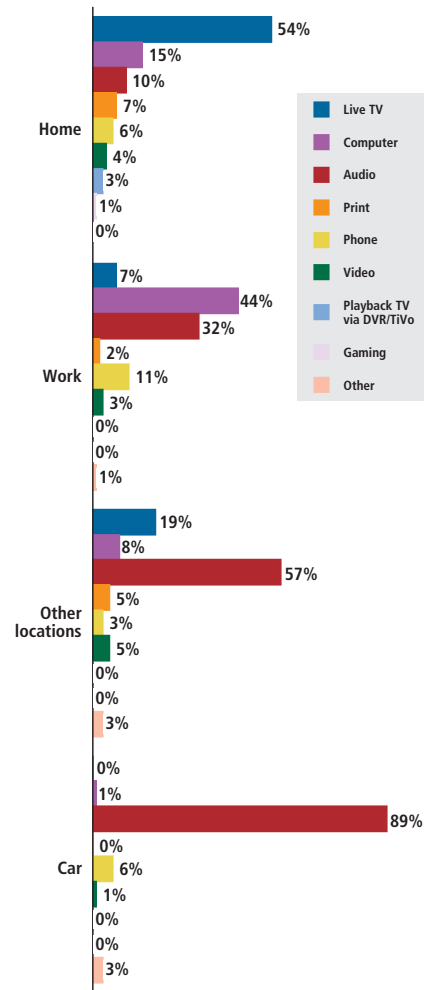
At work, men and women aged 18-34 each spend an average of 6.3 hours a day with media, mostly using a computer or listening to audio. Time spent with media declines significantly for older workers. Men aged 35-54 spend an average of 4.1 hours with media at work, and men aged 55 and older spend an average of 3.0 hours. The drop off is not as sharp among women, with those aged 35-54 spending an average of 5.3 hours with media at work, and those aged 55 and older spending an average of 4.9 hours.

SHARE OF TIME WITH MEDIA, AT HOME VS. OUT OF HOME, 2010



**SOURCE:** Center for Research Excellence

SHARE OF TIME BY TYPE OF MEDIA, BY LOCATION, 2010



**SOURCE:** Center for Research Excellence

**SOURCE:** "Out Of Home Media Use," Center For Research Excellence, Laura Cowan, Chair Media Consumption & Engagement, RJC Advertising, 1200 Pennsylvania St. NE, Albuquerque, NM 87110; 505-266-1100; www.researchexcellence.com. Price: Available online at no charge.

## American Attitudes Toward Gadgets: Smartphones, 3-D TV, VOD & DVR

American households are increasingly cluttered with devices and emerging technologies.

### Smartphones

Most Americans (82%) have a cell phone, and 73% say it is their most used device, according to Forrester. However, only 17% have a smartphone. Even among Gen Xers and Gen Yers, the most digitally savvy users, fewer than 25% have smartphones.

About 60% of cell phone owners have Internet access, meaning most access the Web from a device other than a

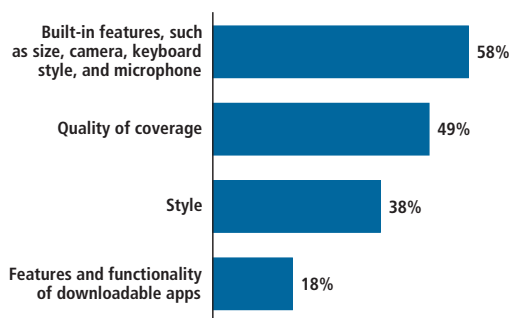
smartphone. A small proportion (14%) access social media sites from their phones.

Among those with smartphones, apps allow their devices to serve new functions with each download. More than four in 10 app users (42%) have completely discontinued use of their MP3 players in favor of smartphones and tablet PCs loaded with apps, reports Deloitte. Some 38% have reduced their use of AM/FM radios, and 30% are using their handheld videogames less. More than a quarter (28%) are using stand-alone GPS devices less.

Nearly two thirds of smartphone owners (62%) say the apps available on their devices encourage them to carry those devices when they normally would not. In fact, 41% use their smartphone as a replacement for their laptop or netbook when they are away from home, and 15% use the devices instead of a computer while at home.

While most of those who own smartphones (65%) download and use apps to take advantage of the additional features that such software provides, only 18% of those who are considering buying a smartphone say the additional features and functionality influence their buying decisions.

FACTORS THAT INFLUENCE CELL PHONE SHOPPERS TO BUY SMARTPHONES, 2010



SOURCE: Deloitte

### 3-D Television

Only 9% of Americans have seen a 3-D television set, and only 7% have bought 3-D content to view on a capable device in the prior six months, says Deloitte. Of those who have watched a 3-D set, 55% say it met their expectations, whereas 24% say it fell below what they expected. The vast majority of U.S. adults (83%) do not think that the addition of 3-D capability is a reason to buy a new set. Among flat panel TV set owners, 60% would not pay more for a 3-D capable TV than one without such technology. Nearly a third of those who have seen 3-D TV say it does not enhance their viewing experience in any way.

Millennials are the most excited about 3-D technology; 20% have seen 3-D TV and 13% have bought 3-D content. In addition, more than half (55%) consider it worth buying a new television in order to view 3-D programming without having to wear 3-D glasses.

The required glasses are a significant barrier to adoption:

31% of those who say the experience of 3-D TV did not meet their expectations also say they dislike wearing the glasses.

### DVR and Video-On-Demand

Four in 10 TV households (40%) have a DVR, and 34% of those have multiple DVR units, according to Leichtman Research. While 89% of DVR users say they skip commercials when viewing recorded programs, 60% of DVR owners say they skipped commercials before they purchased their device. In addition, 52% have used video-on-demand service in the prior month. DVR users have an average annual income 34% higher than non-DVR households, and VOD households have an average annual income 10% higher than the national average.

Netflix's on-demand service, "Watch Instantly," is also increasingly popular. Six in 10 households that subscribe to Netflix (60%) have used "Watch Instantly." Netflix households have an average annual income 24% higher than the national average.

**SOURCES:** "State of Consumers & Technology: Benchmark 2010," Forrester Research, Jacqueline Anderson, Analyst, 400 Technology Sq., 71 Cambridge, MA 02139; 617-613-6000; janderson@forrester.com; www.forrester.com. Price: Call for information.

"Revolutions 2010," Deloitte, Phil Asmundson, Vice Chair Technology, Media, and Telecommunications, 333 Ludlow St., Stamford, CT 06902; 203-708-4860; pasmundson@deloitte.com; www.deloitte.com. Price: Call for information.

"On Demand TV 2010: A Nationwide Study On VOD And DVRs," Leichtman Research, Bruce Leichtman, President, 3 Ellison Ln., Durham, NH 03824; 603-397-5400; info@leichtmanresearch.com; www.leichtmanresearch.com. Price: Call for information.

## YouTube, Five Years Later: Site Continues To Dominate Medium

YouTube.com celebrated its fifth anniversary in February 2010, and continues to dominate in number of visitors and videos streamed each month.

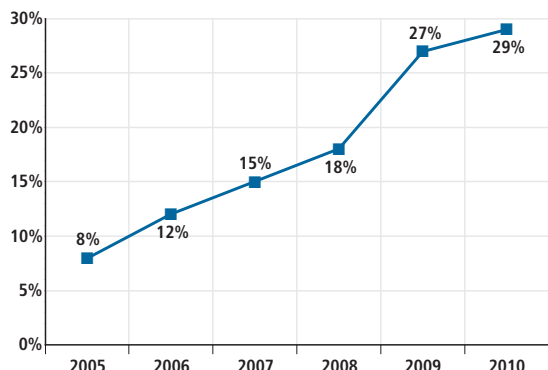
Some 133.5 million Americans watched an online video in April 2010, streaming more than 9.4 billion videos, according to Nielsen. YouTube has nearly four times the number of unique viewers as its next closest competitor, Yahoo! (97 million vs. 28 million). Those are followed by Facebook (24 million viewers), Microsoft properties (15 million viewers), and Hulu (13 million viewers).

Visitors to YouTube streamed nearly five billion videos in April 2010. Hulu follows distantly with 688 million video streams, as does Yahoo! with 204 million streams, and Microsoft properties, with 171 million streams.

YouTube does not lead in time spent with the site, due to the nature of its videos. Netflix viewers spend an average of 7.1 hours with the site each month, and Hulu visitors an average of 4.2 hours. YouTube visitors spend an average of 1.6 hours on the site.

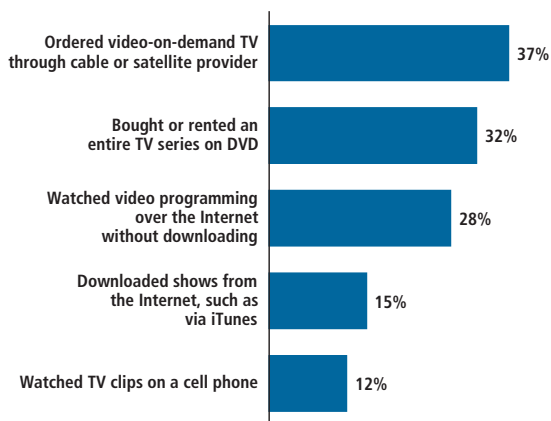
About 74 million Americans aged 12 and older (or 29%) watched online video in the prior week, up from 27% in 2009,

AMERICANS AGED 12 AND OLDER WHO VIEWED ONLINE VIDEO IN THE PRIOR WEEK, 2005-2010



SOURCE: Arbitron

WAYS IN WHICH AMERICANS WATCH VIDEO, ASIDE FROM LIVE TV, 2010



SOURCE: Arbitron

according to Arbitron. More than a quarter watched YouTube videos (28%), compared to only 5% who watched Hulu videos. Nearly half of those 12 and older (46%) have watched a YouTube video ever, compared to 15% who have ever seen a Hulu video.

While online video viewing has blossomed over the past two years, it continues to lag behind video-on-demand services from cable companies and consumer purchases and rentals of DVDs of TV shows.

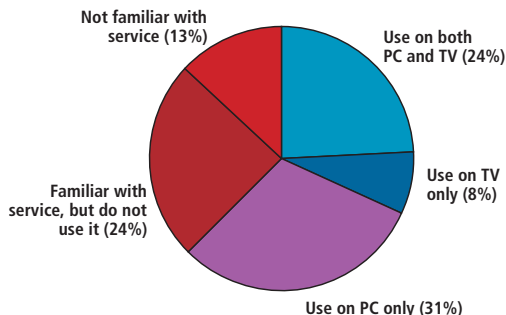
**SOURCES:** "Online Video, April 2010," Nielsen Company, Susan Whiting, Vice Chair, 770 Broadway, New York, NY 10003; 646-654-8499; susan.whiting@nielsenmedia.com; blog.nielsen.com/nielsenwire. Price: Call for information.

"The Infinite Dial," Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriguez@arbitron.com; www.arbitron.com. Price: Available online at no charge.

## Netflix Users Stream Movies To TV

Most subscribers to Netflix (87.1%) are aware they can stream movies on demand. While those who use it are most likely to watch via PC (38.3%), nearly a third stream movies on their TV (31.8%).

NETFLIX SUBSCRIBERS' USE OF STREAMING MOVIES ON DEMAND, 2010



SOURCE: TDG Research

**SOURCE:** "Netflix Video Streamers — A Consumer Snapshot," TDG, Michael Greeson, 9555 Lebanon Rd., #701, Frisco, TX 75035; 469-287-8050; info@tdgresearch.com; www.tdgresearch.com. Price: \$2,500.

## The Internet Is Essential For News And Entertainment

The Internet, cited by 42% of Americans is the most essential medium in their lives, according to Arbitron and Edison Research. The Internet is followed by television (37%), radio (14%), and, distantly, newspapers (5%). In fact, nearly half of Americans (49%) believe there will be no more newspapers in the future because everyone will get their news online.

Asked to choose between eliminating Internet access or TV, Americans are almost evenly split, with 49% ready to forego TV and 48% indicating Internet would have to go. These choices further break down by age, with those younger than 45 opting for Internet over TV, and those 45 and older choosing TV and eliminating Internet access.

The Internet is also a music source, with 31% citing it as their source for learning about new music. Among those aged 12-34, that proportion jumps to 52%. One in six of those ages 12 and older (17%) have listened to online radio in the prior week, more than double the proportion who had done so in 2005. Younger people are more likely to listen to online radio weekly, though 32% of that audience is comprised of the 45-and-older crowd.

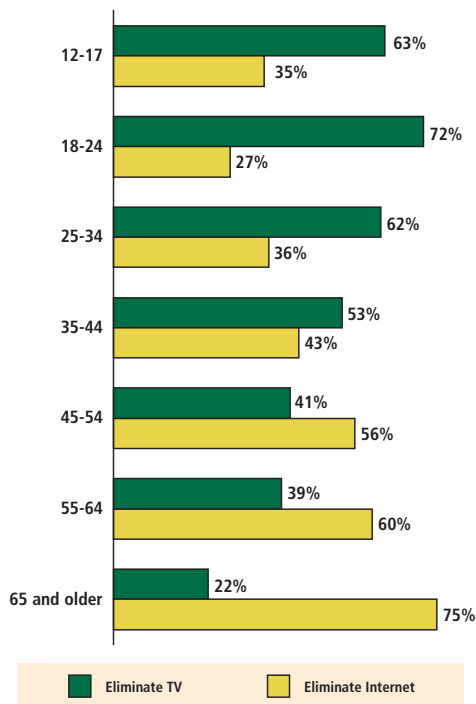
Those who listen at least monthly are more likely to prefer Internet-only radio stations (55%) to online streams of AM/FM stations (40%). Internet radio appeals to these listeners on a number of counts, including:

- ▶ Being able to control the music being played (20%);
- ▶ More music variety (17%);



- ▶ Fewer commercials (14%);
- ▶ Ability to listen to audio they cannot get elsewhere (14%); and
- ▶ Ability to get a clearer signal than over-the-air radio (12%).

AMERICANS' PREFERENCE FOR ELIMINATING TV OR INTERNET SERVICE, BY AGE, 2010



SOURCE: Arbitron and Edison Research

SOURCE: "The Infinite Dial," Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriguez@arbitron.com; www.arbitron.com. Price: Available online at no charge.

## So When Do They Study? College Kids Consuming 12 Hours Of Media Per Day

One in three college students aged 18-24 (33%) have increased their viewing of webisodes or user-generated videos over the past year, according to Alloy Media & Marketing. This age group spends an average 12 hours per day consuming media, including time on the computer, listening to MP3 players, watching TV, and playing videogames. Also:

- ▶ 61% who watch full movies do so on their computers, and 76% watch them on their TVs.
- ▶ 60% use technology devices to shoot, send, or receive video content, with 45% using their cell phones, Smartphones, or PDAs to do so.
- ▶ 68% do not avoid online promotions, and in fact, 20% say these types of ads are most effective.

- ▶ 53% do not avoid webisode or pre-roll ads while online.

TIME COLLEGE STUDENTS SPEND ON MEDIA PER DAY, 2009

Computer .....	5 hours
Television .....	2.5 hours
Cell phone.....	2.4 hours
MP3 player.....	1.3 hours
Gaming .....	0.75 hours
<b>TOTAL .....</b>	<b>11.95 HOURS</b>

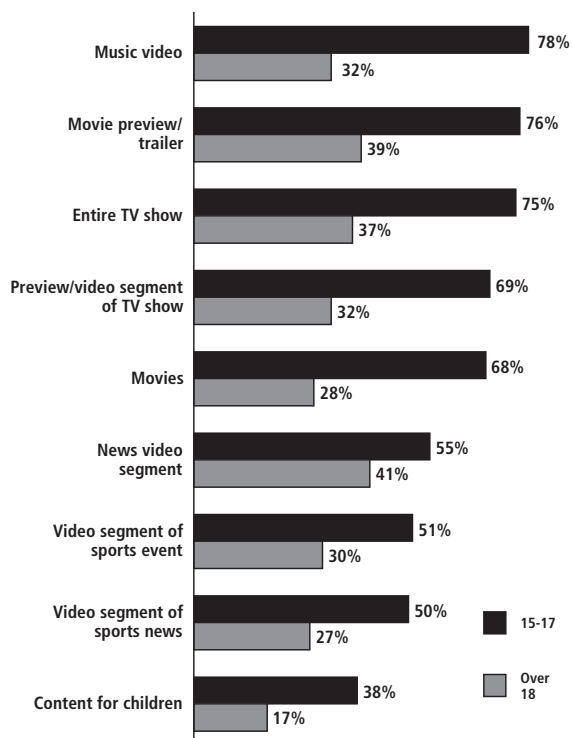
SOURCE: Alloy Media & Marketing

SOURCE: "College Explorer 2009," Alloy Media & Marketing, Andy Sawyer, SVP, Media Services, 151 W. 26th St., New York, NY 10001; asawyer@alloymarketing.com; www.alloymarketing.com.

## Nearly Half Of 15-17-Year-Olds Watch Content Away From Traditional TV

Half of Internet users aged 15-17 (48%) watch TV on the computer or via a handheld device, up from 24% from last year, according Horowitz. This group is most likely to watch music videos (78%), movie previews or trailers (76%), and entire TV programs (75%) on something other than the traditional TV screen. Sports, kids' content, and movies are least likely to garner their attention.

PROGRAMMING WATCHED VIA COMPUTER SCREEN OR HANDHELD DEVICE AT LEAST ONCE A MONTH, 15-17-YEAR-OLDS VS. ADULTS



SOURCE: Horowitz Associates

**SOURCE:** Horowitz Associates, Adriana Waterston, VP Marketing, Business Development, 1971 Palmer Ave., Larchmont, NY 10538; 914-834-5999; adrianaw@horowitzassociates.com; www.horowitzassociates.com.

### What Youth Watch On TV And Visit Online

Those under age 15 are more likely to watch Disney than Nickelodeon, yet their preferences reverse when they go online, according to NPD Group.

Their preferences highlight the vast discrepancies when marketers try to group those under 15 into one category. It's doubtful the same user is visiting both Facebook and Webkinz.

#### WEBSITES KIDS UNDER 15 VISIT MOST REGULARLY

YouTube	25%
Nickelodeon	16%
NickJr.com	15%
Disney.com	12%
Facebook	12%
Webkinz	11%
DisneyChannel.com	10%
PBSKids	9%
CartoonNetwork	9%
iTunes	8%
MySpace	8%
ClubPenguin	8%
Yahoo! (games, music, video)	7%
Google (games, music, video)	6%
PlayhouseDisney	5%
AddictingGames	5%
Barbie/BarbieGirl	4%
Pogo	4%
Disney Toon Town	4%
Hulu	3%

**SOURCE:** NPD Group

#### TV CHANNELS KIDS UNDER 15 WATCH MOST REGULARLY

Disney Channel	59%
Nickelodeon	56%
Cartoon Network	50%
Nick Jr.	42%
ABC Family	29%
PBS Kids	25%
Animal Planet	24%
NickToons	23%
Noggin	22%
Toon Disney	21%
Discovery Kids	18%
ABC Kids	18%
Disney XD	17%
Boomerang	16%
PBS Sprout	12%
MTV	8%
VH-1	7%
ESPN	6%

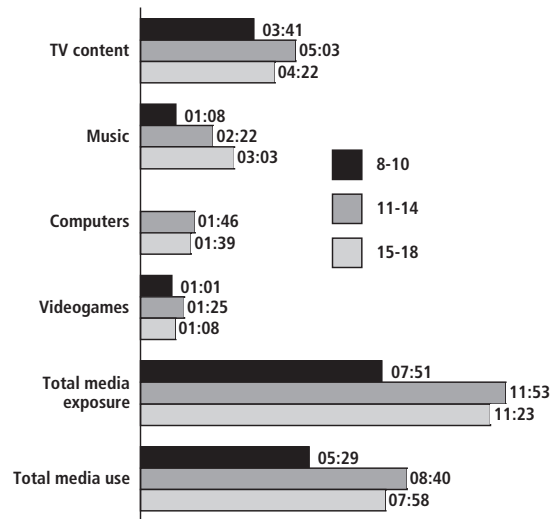
**SOURCE:** NPD Group

**SOURCE:** NPD Group, Anita Frazier, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita\_frazier@npd.com; www.npd.com.

### Media Usage Linked To Poor Grades

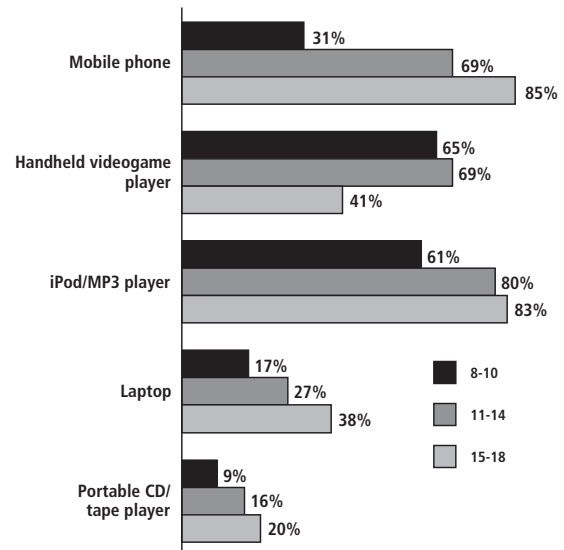
Kids and teens aged 8-18 who consume more than 16 hours of media a day — including TV watching, listening to music, and playing on the computer — are more likely to receive poor grades than 8-18-year-olds who consume less than three hours a day (47% vs. 23%), according to the Kaiser Family Foundation.

#### MEDIA USE, BY AGE, IN HOURS, MINUTES



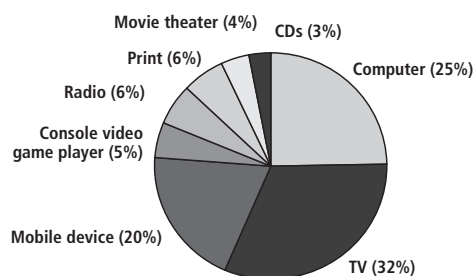
**SOURCE:** Kaiser Family Foundation

#### PERSONAL MEDIA OWNERSHIP, BY AGE, 2009



**SOURCE:** Kaiser Family Foundation

## HOW 8-18-YEAR-OLDS CONSUME MEDIA



SOURCE: Kaiser Family Foundation

On average, 8-18-year-olds devote seven hours and 38 minutes a day to media usage, adding up to 53 hours a week. Media use increases substantially when children reach ages 11-14. For instance, it increases 1:22 with TV content, 1:14 with music, one hour using the computer, and :24 playing video games, for total media exposure of 11:53 per day.

Black and Hispanic kids and teens consume more than four hours more media daily than White youth. Specifically, Black children watch six hours and Hispanics watch 5.5 hours of TV a day, compared to the 3.5 hours that White kids spend watching TV. Notably the amount of time spent watching traditional TV declined by 25 minutes between 2004 and 2009. However, this decrease was offset by non-traditional TV watching, such as online, via mobile, and via time-shifting which increased almost an hour.

Nearly half of kids and teens (45%) say the TV is left on "most of the time," even when no one is watching it, and 64% say it's on during meals. More than seven in 10 (71%) have a TV in their bedroom and 50% have a videogame console player in their bedroom.

Although time spent texting is not included in the study, students in grades 7-12 spend an average one hour and 35 minutes a day sending and receiving text messages.

SOURCE: "Generation M2: Media in the Lives of 8-18-Year-Olds," Kaiser Family Foundation, Vicky Rideout, VP Director Media & Health, 2400 Sand Hill Rd., Menlo Park, CA 94025; 650-854-9400; vrideout@kff.org; www.kff.org.

## Who Are Print Newspaper Readers?

Nearly all adults (99%) get news from some source daily, according to Pew Internet & American Life Study. The majority (59%) get news both online and offline, while 38% follow news offline only, and 2% online only. Half (50%) read their local print newspaper daily, and 17% read a national newspaper daily. That compares to 78% who get news from a local TV station, 73% from a national TV station, and 61% from an online source.

Local newspaper readers are more likely than average to be White, aged 50 or older, and to not own a cell phone. Those who use social media sites, such as Facebook and Twitter, are less likely than average to read local papers.

Readers of national print newspapers are more likely than average to be college graduates, live in a household with an income of \$75,000 or more, and vote Democrat. They are more likely than average to discuss news with friends and to believe that news is important to their jobs.

Nearly four in 10 of those who follow news online (38%) visit newspaper websites.

ADULTS WHO READ ONLINE EDITIONS OF NEWSPAPERS IN A TYPICAL DAY, BY AGE, 2010



SOURCE: Pew Internet & American Life Study

SOURCE: "Understanding The Participatory News Consumer," Pew Internet & American Life Project, John Horrigan, Associate Director Research, 1615 L St. NW, #700, Washington, DC 20036; 212-419-4500; jhorrigan@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

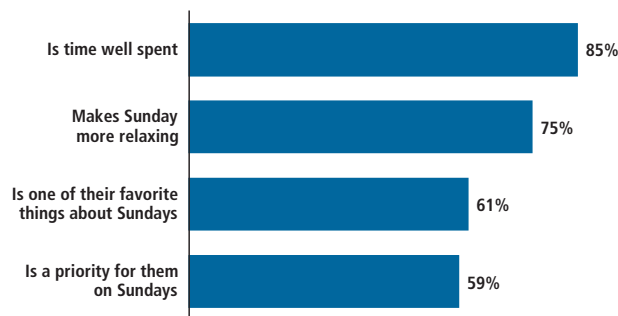
## Reading The Newspaper Is An Important Part Of Americans' Sunday Routines

Nearly three quarters of adults (72%) read the Sunday newspaper, according to *Parade* magazine. Most of those read it at home (92%) and in the morning (62%). Nearly six in 10 (59%) keep sections of the paper to reference during the week.

Most readers of the Sunday paper find it valuable because it provides them with coupons and rebate offers (88%), is a good source of information about products and services (79%), and helps them plan their weekly purchases (64%).

The Sunday paper also keeps readers informed about their community (86%), as well as other key topics such as jobs, careers, and education (66%), finances and investments (40%), and health and medicine (38%). More than sev-

READERS' ATTITUDES TOWARD THE SUNDAY EDITION OF THEIR NEWSPAPER, 2010



SOURCE: *Parade* magazine

en in 10 (71%) say it also gives them things to talk about with other people.

SOURCE: "Sunday In America," *Parade*, Jim Hackett, SVP Marketing, 711 3rd Ave., New York, NY 10017; 212-450-7125; jim\_hackett@parade.com; www.parade.com. Price: Summary of findings available upon request at no charge.

## Newspapers Are Not An Essential Medium

Only 5% of Americans cite newspapers as the most essential medium in their lives, compared to 11% in 2002, according to Arbitron and Edison Research. In fact, 49% believe that newspapers will no longer exist in the future because people will get all of their news online, a proportion that has increased from 27% in 2007. However, they may be getting their online news from online newspapers — the same proportion of Americans visit local TV station websites as visit local newspaper websites.

AMERICANS WHO HAVE VISITED LOCAL MEDIA WEBSITES IN THE PRIOR MONTH, 2010



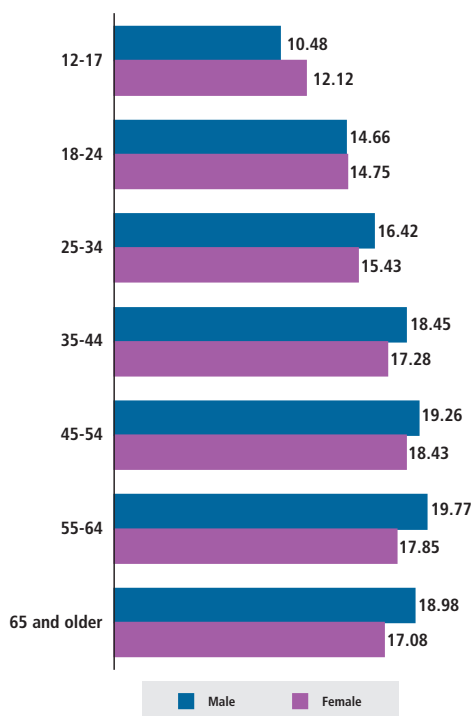
SOURCE: Arbitron and Edison Research

SOURCE: "The Infinite Dial," Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriguez@arbitron.com; www.arbitron.com. Price: Available online at no charge.

## Black Radio Listening: Time Spent And Format Vary By Gender

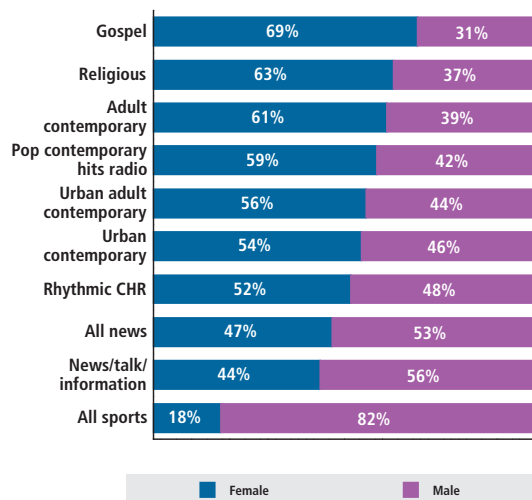
The proportion of Blacks aged 12 and older who listen to radio rose slightly to 94.0%, up from 92.5% in 2009, according to Arbitron. They spend an average of 16 hours, 35 minutes, per week listening to radio, up from 16 hours in 2009.

AVERAGE NUMBER OF HOURS BLACK MEN AND WOMEN LISTEN TO RADIO, PER WEEK, BY AGE, 2010



SOURCE: Arbitron

FEMALE VS. MALE SHARE OF RADIO AUDIENCE, BY STATION FORMAT, 2010



SOURCE: Arbitron

Consistent with prior years, Black girls aged 12-17 listen to more radio than Black boys the same age. They spend a nearly equal amount of time listening to radio between the ages of 18-24, then at age 25 Black men's radio listening surpasses that of Black women and the gap grows as they age.

The types of music they listen to also varies significantly by gender, with Black men accounting for the larger share of sports and news/talk programming listeners and Black women accounting for a greater proportion of gospel and religious programming listeners.

**SOURCE:** "Black Radio Today, 2010," Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriguez@arbitron.com; www.arbitron.com. Price: Available online at no charge.

## Hispanics Spend More Time Listening To Radio Than The Average American

Hispanics aged 12 and older spend an average of 15 hours, 45 minutes a week listening to radio, a half hour more than the average American, according to Arbitron. Among those aged 12-24, women spend more time than men listening to radio, but the time men spend with radio shoots up at age 25, when their time spent listening to radio surpasses women's (see chart).

Spanish-dominant Hispanics spend more time listening to radio (16 hours, 45 minutes) than English-dominant Hispanics (14 hours, 30 minutes).

Both Spanish- and English-dominant Hispanics spend more time listening to radio away from home than at home, however at-home listening accounts for 42% of Spanish-dominant Hispanics' time with radio, compared to 36% for English-dominant Hispanics.

TIME BLACKS SPEND LISTENING TO THE RADIO IN A TYPICAL WEEK, MEN VS. WOMEN, 2009  
(Hours:Minutes)

	MEN	WOMEN
12-17	9:00	10:45
18-24	13:45	14:15
25-34	18:00	14:45
35-44	19:30	16:45
45-54	18:30	17:00
55-64	18:45	16:30
65 and older	18:00	16:45

SOURCE: Arbitron

The radio formats most favored by Hispanics include:

- ▶ Mexican regional (which accounts for 20.6% of Hispanic radio listening);
- ▶ Spanish contemporary (9.1%);
- ▶ Rhythmic contemporary hit radio (8.1%);
- ▶ Spanish adult hits (7.3%);
- ▶ Adult contemporary (5.5%);
- ▶ Pop contemporary hit radio (5.3%);

- ▶ Spanish tropical (3.8%);
- ▶ News/talk/information (3.8%); and
- ▶ Classic hits (3.8%).

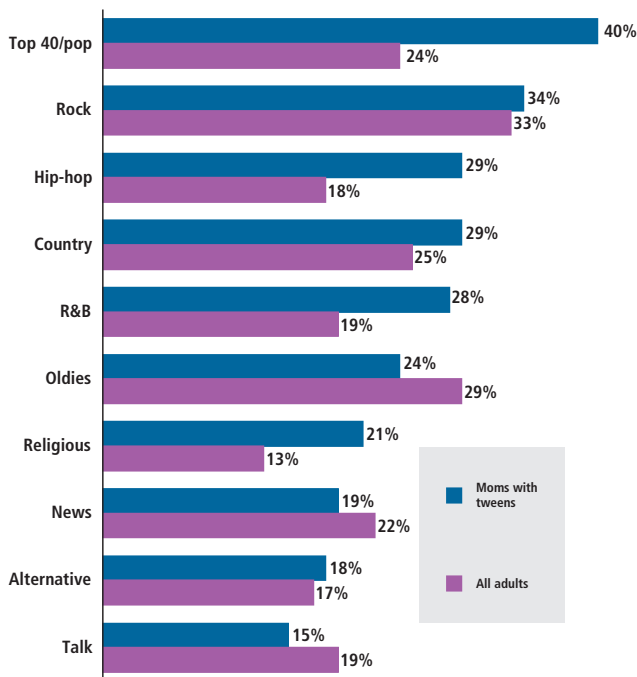
**SOURCE:** "Hispanic Radio Today, 2009," Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriquez@arbitron.com; www.arbitron.com. Price: Available online at no charge.

## Moms With Tweens Listen To Pop, Rock

Moms with tweens are more likely than adults in general to listen to top 40/Pop (40% vs. 24%), hip-hop (29% vs. 18%), and religious (21% vs. 13%) stations on the radio, according to the Retail Advertising and Marketing Association.

Conversely, adults overall are more likely than moms of tweens to set their radio dial to talk radio (19% vs. 15%) and news stations (22% vs. 19%).

PREFERRED RADIO FORMATS, MOMS OF TWEENS VS. ALL ADULTS



**SOURCE:** Retail Advertising & Marketing Association

**SOURCE:** Retail Advertising & Marketing Association, National Retail Federation, Kathy Grannis, 325 7th St. NW, #1100, Washington, DC 20004; 202-626-8189; grannisk@nrf.com; www.rama-nrf.org.

## Teens Prefer MP3 Tunes Over Radio

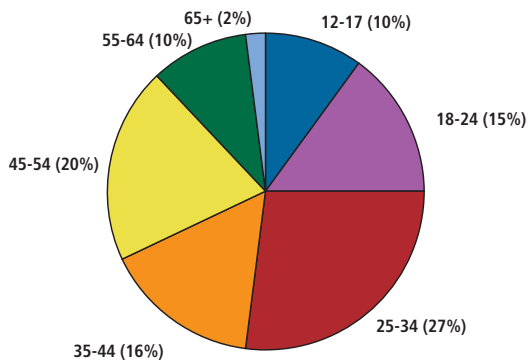
Nearly three in 10 teens aged 12-17 (27%) spend less time listening to over-the-air radio specifically because they prefer to listen to music via an MP3 player, according to Arbitron and Edison Research. Teens and those aged 18-24 (27%) are most

likely to be making this switch, compared to 10% of 35-44-year-olds and 8% of 45-54-year-olds.

One in 10 teens (10%) listen to online radio on a weekly basis, significantly fewer than those aged 25-34 (27%) and 45-54 (20%). Although younger listeners may not tune into online channels, they are more likely than older listeners to want music to become more integrated into their gadgets:

- ▶ 59% of 12-24-year-old smartphone owners listen to music on their phones;
- ▶ Four in 10 (41%) would listen to more FM radio if their smartphones had an FM tuner, compared to 23% of adults;
- ▶ 30% are "very interested" in listening to online audio in cars, compared to 27% of adults;
- ▶ 28% are "very interested" in listening to online audio on their smartphones, compared to 18% of adults.

LISTENERS OF ONLINE RADIO, EACH WEEK, BY AGE GROUP



**SOURCES:** Arbitron, Edison Research

**SOURCES:** Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriquez@arbitron.com; www.arbitron.com.

"The Infinite Dial 2010," Edison Research, Tom Webster, VP, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; twebster@edisonresearch.com; www.edisonresearch.com

## 12-24 Year Olds Listen To Radio, But Also Go Online For Music

Americans aged 12-24 spend an average of 1 hour, 24 minutes, per day listening to AM/FM radio in 2010, down from an average of 2 hours, 43 minutes, per day in 2000, according to Edison Research. Despite their decreasing use of radio, 64% would be disappointed if the stations they listen to no longer existed.

Those who listen to radio do so in order to hear their favorite songs (80%), to learn about new songs (72%), to find out what songs are popular (66%), and because they enjoy hearing DJs and personalities along with the music (58%). The most common reasons 12-24 year olds do not listen to radio more are that radio stations play too many commer-

cials (74%), they would rather listen to their own music via a digital music player (73%), and radio stations have too much talk (62%).

Only 41% of 12-24 year olds regularly listen to radio in the morning, down from 74% in 2000. By comparison, they are more likely to regularly watch TV (42%, up from 38% in 2000) and go online (42%, up from 16%) in the morning.

The Internet is also competing with radio as a source for learning about new music. Friends (90%) and radio (88%) are the most common ways 12-24 year olds learn about music, but 72% discover it on YouTube, 56% via social networking sites, and 42% via online radio stations such as Pandora and Last.fm.

A third of 12-24 year olds (33%) have used Pandora. They choose to listen to it because:

- ▶ They like the ability to create “radio stations” based on their favorite songs or artists (55%);
- ▶ They like the ability to skip songs they do not want to hear (52%);
- ▶ It has fewer commercials than AM/FM radio (46%);
- ▶ It is easy to use (46%);
- ▶ It plays a wider selection of songs than AM/FM radio stations do (42%);
- ▶ It learns about their musical tastes and continues to adapt the music it selects for the user (39%); and
- ▶ It has no DJs or personalities (29%).

**SOURCE:** “Radio’s Future II: The 2010 American Youth Study,” Edison Research, Tom Webster, VP, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; twebster@edisonresearch.com; www.edisonresearch.com. Price: Available online at no charge.

## TV Viewing Takes A Technical Twist: Americans Watch Most Shows Via TV Sets, But Many Watch Online

Some 96% of Americans watch television, according to Harris Interactive. The vast majority (85%) watch primarily on a TV set, including 18% who sometimes view via computer. Some 5% of Americans view shows equally on TV and on a computer, and 5% watch primarily on computer.

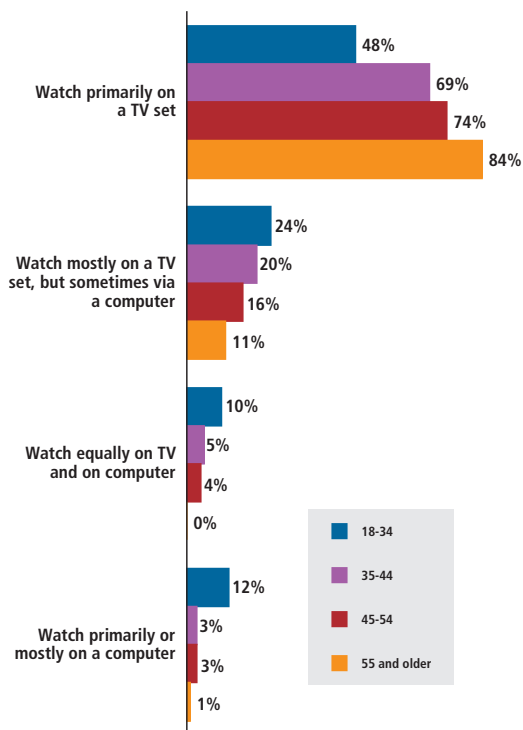
Watching TV via a computer is far more common among 18-34 year olds than their older counterparts. While 72% watch TV primarily on a TV set, that includes 24% who sometimes watch on a computer. One in 10 (10%) watch equally on TV and on a computer, and 12% watch primarily via computer.

### Streamers

While the majority of households still view TV in the traditional way, via a TV set, a growing proportion watches a significant amount of shows and movies by streaming them from the Web, thanks to network websites, Hulu.com, and Netflix's watch instantly service.

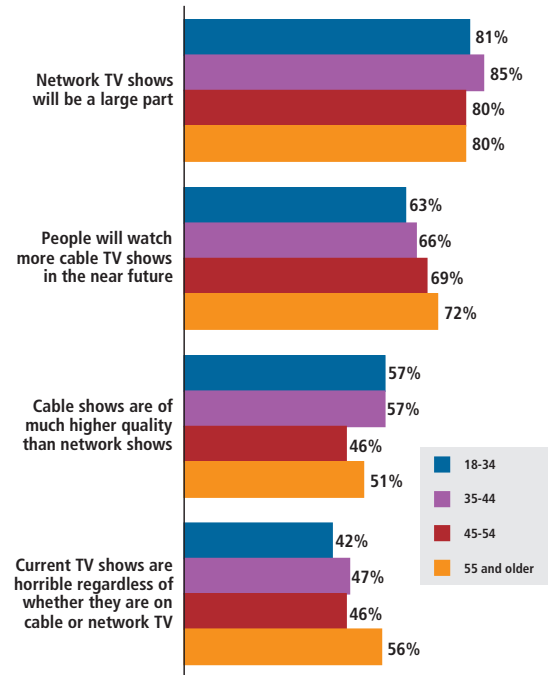
One in five households (20%, or 34 million) stream more than four hours of video from the Web in an average week and spend less time watching live TV than they did a year ago; Say Media terms these households "On Demanders."

HOW AMERICANS CONSUME TELEVISION SHOWS, TV SET VS. COMPUTER, BY AGE, 2010



SOURCE: Harris Interactive

AMERICANS' ATTITUDES TOWARD TELEVISION SHOWS, NETWORK VS. CABLE, BY AGE, 2010



SOURCE: Harris Interactive

One in eight households (13%, or 22 million) are termed "Opt Outs." They don't own a TV or haven't watched live TV in the prior week and they stream more than four hours of video from the Web in an average week.

Both On Demanders (average age 38) and Opt Outs (average age 36) are younger than the rest of online Americans (average age 42). Opt Outs include the highest proportion of 18-24 year olds (30%), followed by On Demanders (23%), and the rest of online adults (15%). On Demanders have a median annual income of \$65,000, compared to \$54,000 for other online adults. Opt Outs have a lower-than-average median income (\$42,000).

On Demanders have an average of 5.4 devices in their homes that they can use to view video, compared to Opt Outs who own an average of 3.9 devices and the rest of online adults who own an average of 4.6. Nearly half of On Demanders (47%) are Netflix subscribers, compared to 25% of Opt Outs and 24% of the rest of online adults. Four in 10 (40%) have a mobile video device. All of them (100%) view live TV in a typical week, and 89% also use the Internet to watch video. Three quarters (75%) watch video via DVD in a typical week, 39% watch via DVR, 39% via streaming TV, and 25% via mobile.

On Demanders watch the most TV per week, averaging 30 hours. Opt Outs average 21 hours per week, and the rest of online adults average 25 hours per week. More than a quarter of On Demanders time viewing video (27%) is streamed online. Opt Outs stream 52% of the video they



watch. Only 16% of the video viewing other online adults do is streamed.

Americans may be tolerant of online video advertising; a recent study by The CW found that 95% of viewers watched advertising in the online stream of their shows to completion, and 97% watched to the middle of the ad. But consumers may be more accepting of that advertising because it comes with long-form online video that they have sought out to view.

### What They Watch

Americans most commonly say they watch network and cable TV shows equally (36%), finds Harris Interactive. Three in 10 (30%) mostly watch network shows, and 29% mostly watch cable shows.

Men and women are equally likely to say they evenly split their TV viewing among network and cable shows (36% each). Women (33%) are more likely than men (26%) to say they watch more network shows, whereas men (33%) are more likely than women (25%) to say they watch more cable shows.

While the vast majority of Americans (82%) think that network TV shows will be a large part of people's viewing habits, 65% think people will watch more cable TV shows in the near future. Slightly more than half of Americans (51%) think cable shows are of much higher quality than network shows. Nearly half (48%) say current TV shows are horrible regardless of whether they are on cable or network TV.

**SOURCES:** "Off The Grid: Marketing To The Next Generation Media Consumer," Say Media, Matt Rosenberg, VP Solutions, 180 Townsend St., San Francisco, CA 94107; 415-738-5100; offthegrid@saymedia.com. Price: Call for information.

"Troubles For Traditional Media," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

The CW, Rob Tuck, VP Network Sales, 11800 Wilshire Blvd., Los Angeles, CA 90025; 310-575-7000; rob.tuck@cwtv.com; www.cwtv.com.

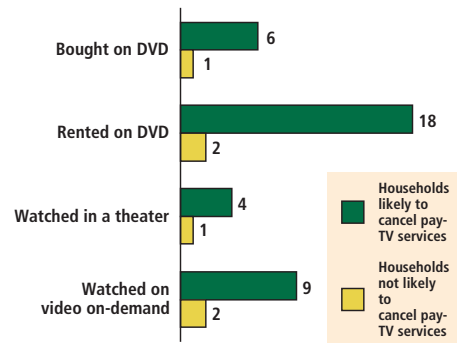
## Online Video Does Not Pose A Threat To Pay-TV Services

Only 5.5 million households with broadband Internet access (or fewer than 8%) are considering canceling their pay-TV services in favor of viewing online video, according to Parks Associates. This represents a steady decline from 2008, when 11% were considering the move, and early 2009, when 10% were pondering it.

Those considering the switch watch an average of 10 hours of online video each week, a much higher number than the average household. They are also more likely to view DVDs that they have bought or rented, see movies in a theater, and use video on-demand.

Overall, only 0.5% of households who had pay-TV and cancelled it watch more than five hours of online video per week.

**NUMBER OF MOVIES AND TV PROGRAMS HOUSEHOLDS VIEW ON DVD, IN THEATERS, OR VIA VOD, BY LIKELIHOOD TO CANCEL PAY-TV SERVICES, 2010**



**SOURCE:** Parks Associates

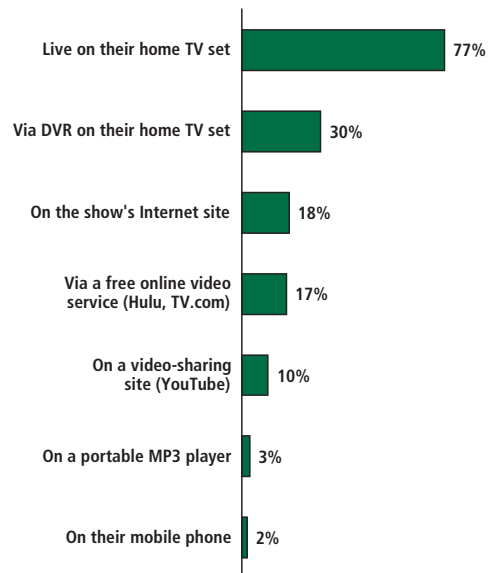
**SOURCE:** "All Eyes On Video," Parks Associates, John Barrett, Director of Research, 5310 Harvest Hill Rd., #235, Dallas, TX 75230; 972-490-1113; barrett@parksassociates.com; www.parksassociates.com. Price: Call for information.

## Hard Times Prove Boon To Television, As Viewership Rises And Advertising Clout Outpaces Other Media

Americans aged 14-75 (34%) most commonly say watching TV is their favorite media activity, followed distantly by surfing the Internet (14%), according to Deloitte.

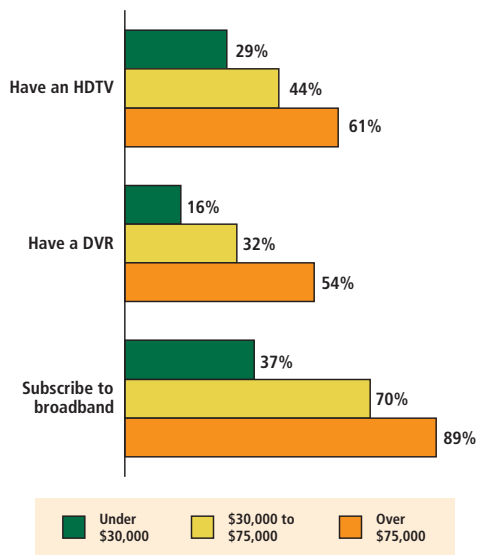
They watch an average of 18 hours of television in a typical week, up from fewer than 16 hours in 2008. Those aged

**HOW AMERICANS WATCHED VIDEO PROGRAMMING IN THE PRIOR SIX MONTHS, 2009**



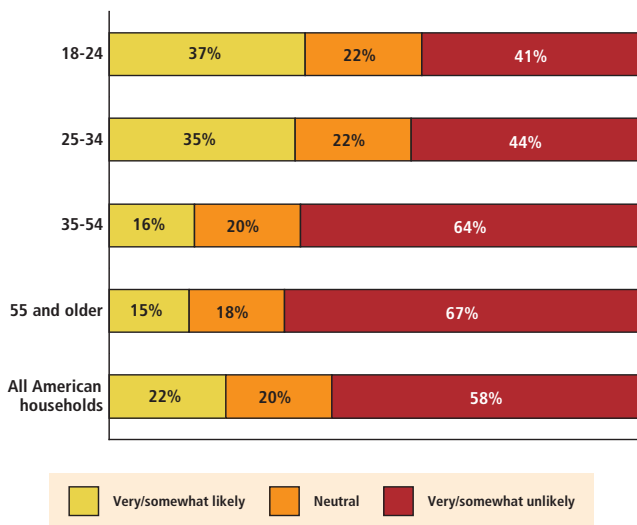
**SOURCE:** Deloitte

AMERICAN OWNERSHIP OF TV TECHNOLOGIES, BY INCOME, 2009



SOURCE: Leichtman Research Group

LIKELIHOOD AMERICANS WILL PURCHASE AN HDTV SET IN THE NEXT THREE MONTHS, 2009



SOURCE: Ipsos MediaCT

14-26 posted the greatest increase in TV viewing: they watch an average of 15 hours a week, up from 10.5 in 2008.

One explanation for the increase in TV viewing is that during the recession 72% of Americans cut back spending on other entertainment, such as concerts, DVDs, CDs, and sporting events, turning instead to less expensive TV entertainment as a substitute.

The vast majority (86%) prefer to watch TV shows on their television set live, via DVR, or On Demand. Only 10% prefer to watch via an online platform; however, 65% would

like to be able to connect their TV to the Internet to view video or download content.

Television continues to be the most influential advertising medium, with 83% of consumers saying it is among the top three media that impact their purchase decisions.

Fewer than half say online advertising is among the top three media influences on their purchases. In addition, only 59% say that an online ad has encouraged them to visit a website, down from 72% in 2007. The proportion who would click on online ads if they were targeted to their needs fell to 50%, down from 66% over the same period.

However, 55% of shoppers pay attention to online consumer reviews, including 69% of 14-26 year olds. A slight majority (51%) has bought a product based on a consumer review, and 24% favor an online service that recommends products based on other consumers' preferences.

TV Technology Of The 2000s

Americans adopted a number of new television technologies in the 2000s. At the end of 2009, nearly 50% of households have an HDTV, and nearly 40% have a DVR, compared to fewer than 1% of households that had either technology at the beginning of the decade, reports Leichtman Research Group. The greater their household income, the more likely they are to own such technologies.

3D may be the TV technology that Americans latch on to in the next decade. More than a third (36%) are interested in watching 3D video on their TVs, including 58% of those aged 18-24 and 49% of those aged 25-34, according to Ipsos MediaCT. While 3D movies have been a fad in the past, it may become a lasting trend both because consumers can expect more high-quality content in the future from Disney-Pixar (which announced all of its future movies will be in 3D) and Discovery Channel and ESPN (both of which have announced plans for channels featuring 3D programming. In addition, the technology is appealing to gamers, who are constantly seeking more immersive gaming experiences.

Viewing Via Web, DVR Surges

Consumers continue to spend more time watching video content online (up 35% year-over-year) and via DVRs (up 21%), according to Nielsen.

Time spent viewing videos embedded in social network profiles and site pages increased 98% from October 2008 to October 2009. In what Nielsen says is a sign of "increased maturity" of both the social media and video markets, much of the growth in video consumption within social media is coming from older generations, with the 35- to 49-year-old segment increasing its viewing time by 37% year over year, and the 65+ segment increasing its viewing by 47%.

Mobile video viewing also continues to grow, with 15.7 million Americans viewing video on their mobile phones in the third quarter, an increase of 53% from last year. Teens spend the most time watching mobile video, at an average of about seven hours per month.

**SOURCES:** "State of the Media Democracy," Deloitte, Ed Moran, Director of Insights and Innovation, 2 World Financial Center, New York, NY 10281; 212-436-6839; emoran@deloitte.com; www.deloitte.com. Price: Call for information.

"A2/M2 Three Screen Report," Nielsen Company, Susan Whiting, Vice Chair, 770 Broadway, New York, NY 10003; 646-654-8499; susan.whiting@nielsenmedia.com; blog.nielsen.com/nielsenwire. Price: Call for information.

"Motion," Ipsos MediaCT, Todd Board, SVP, 49 Stevenson St., 15th Fl., San Francisco, CA 94105; 415-597-4013; todd.board@ipsos.com; www.ipsos-na.com. Price: Call for information.

Leichtman Research Group, Bruce Leichtman, President, 3 Ellison Ln., Durham, NH 03824; 603-397-5400; info@leichtmanresearch.com; www.leichtmanresearch.com. Price: Call for information.

## Middle-Aged Americans Enjoy Time-Shifted TV

More than a third of households (36%) have a DVR in 2010, up 51% from 2008, according to Nielsen Company. The average person spends two hours, nine minutes viewing time-shifted TV per week. By age that breaks down to:

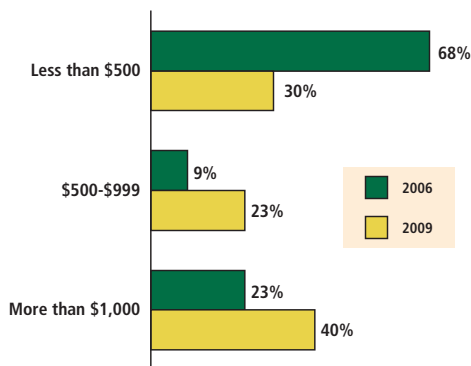
- ▶ One hour, 32 minutes among 2-11 year olds;
- ▶ One hour, 20 minutes among 12-17 year olds;
- ▶ One hour, 31 minutes among 18-24 year olds;
- ▶ Three hours, among 25-34 year olds;
- ▶ Two hours, 50 minutes among 35-49 year olds;
- ▶ Two hours, 30 minutes among 50-64 year olds; and
- ▶ One hour, 17 minutes among those aged 65 and older.

**SOURCE:** "Three Screen Report," Nielsen Company, Susan Whiting, Vice Chair, 770 Broadway, New York, NY 10003; 646-654-8499; susan.whiting@nielsenmedia.com; www.nielsen.com. Price: Call for information.

## TV Sales Steady, Big Screens Make Big Move Up

Approximately 20% of American households bought new televisions in 2006 and in 2009, reports Experian Simmons. In 2006, 70% of the TVs that they bought were traditional picture tubes, whereas in 2009, 49% were LCD, 22% plasma, and 9% projection. Nearly half of TVs that Americans bought in

AMOUNT AMERICANS SPENT ON NEW TELEVISION PURCHASES, 2006 VS. 2009



**SOURCE:** Experian Simmons

2009 were 40 inches or larger (47%), compared to only 18% in 2006. Only 9% of TVs bought in 2009 were smaller than 21 inches, compared to 25% in 2006.

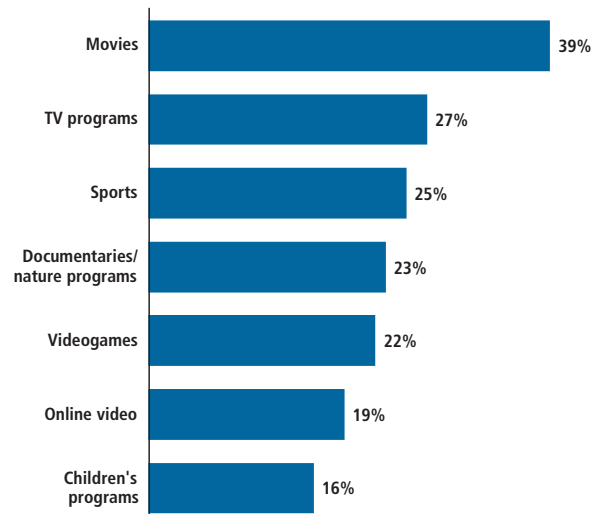
Hooked into their TVs, 94% of households have DVD players (up from 91% in 2006), 79% have VCRs (down from 91%), and 40% have DVRs (up from 19%).

**SOURCE:** "2010 Technology Report," Experian Simmons, Eileen Merken, Director Analytics, 1501 SW FAU Research Park Blvd., #100, Deerfield Beach, FL 33441; 954-246-8220; eileenm@smrb.com; www.smrb.com. Price: Call for information.

## 3D TVs Are Looking Good To Consumers

One in eight adults (13%) are familiar with 3D TV sets, and 8% say they are likely to buy one, according to Parks Associates. According to the researcher, the consumer most likely to buy a 3D set is one who is in the market for a new flat panel television and is also aware of 3D technology for TVs.

TYPES OF VIDEO AMERICANS ARE INTERESTED IN VIEWING ON A 3DTV SCREEN, 2010



**SOURCE:** Parks Associates

**SOURCE:** "Trends In 3DTV," Parks Associates, Pietro Macchiarella, Research Analyst, Parks Associates, 5310 Harvest Hill Rd., #235, Dallas, TX 75230; 972-996-0219; pietro@parksassociates.com; www.parksassociates.com. Price: Call for information.

## Television's Fall Favorites: Suspense Shows

Americans most commonly plan to tune into suspense shows (cited by 27%) as the 2010-2011 television season kicks off. Nearly a quarter (22%) are looking forward to watching comedies. Americans most commonly say reality shows (cited by 40%) and vampire/supernatural themes (22%) are the most overdone.

The new series they are most looking forward to are:  
 ▶ *Law & Order: Los Angeles* (27%);

- ▶ *Hawaii Five-0* (23%);
- ▶ *Undercovers* (13%); and
- ▶ *The Event* (13%).

The most anticipated returning series are:

- ▶ *NCIS* (24%);
- ▶ *House* (21%); and
- ▶ *The Office* (15%).

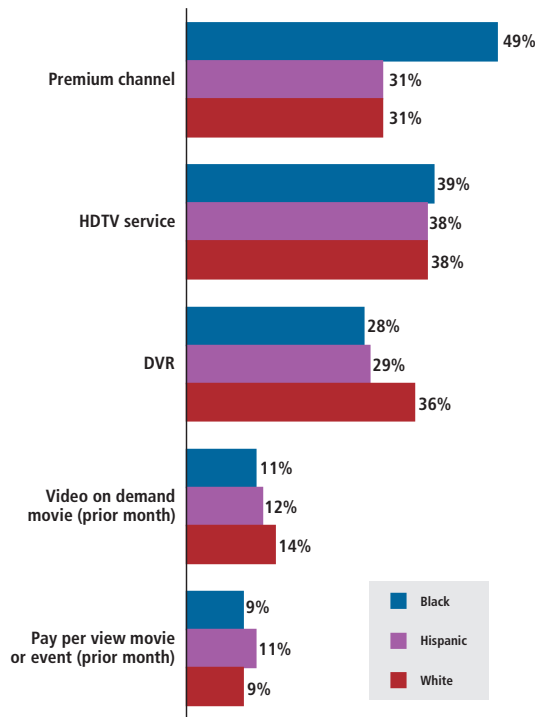
Viewers most commonly find new shows to watch based on their similarity to shows they already watch.

**SOURCE:** "Fall TV Survey," TiVo, Jesica Loebig, 2160 Gold St., PO Box 2160, Alviso, CA 95002; 408-519-9655; jloebig@tivo.com; www.tivo.com.

## Blacks Outspend Hispanics And Whites On Television Services

Black households spend more per month than White and Hispanic households for TV services, according to Centris. Among cable subscribers, Blacks spend an average of \$80.30 a month, compared to an average of \$69.50 for Whites and an average of \$72.80 for Hispanics. That may be partly because Black households are slightly more likely than White and Hispanic households to subscribe to digital rather than analog cable service. However, Blacks also spend more among satellite subscribers, at an average of \$87.72 per month, compared to an average of \$68.87 for Whites and an average of \$67.49 for Hispanics.

TYPE OF TELEVISION SERVICE PROVIDER, BY RACE/ETHNICITY OF PURCHASING HOUSEHOLDS, 2010



**SOURCE:** Centris

The most likely explanation for Blacks' higher cable bills is the services they purchase — they are significantly more likely than Hispanics and Whites to subscribe to premium channels. Whites are more likely than both Hispanics or Blacks to have DVR; however, it may be a box that is not tied to their cable provider and would therefore not affect their cable bill.

TYPE OF TELEVISION SERVICE PROVIDER, BY RACE/ETHNICITY, 2010

	BLACK	HISPANIC	WHITE
Digital cable	39%	31%	36%
Analog cable	17%	14%	15%
Satellite	23%	27%	30%
Fiber	5%	5%	5%
Over-the-air	12%	21%	13%

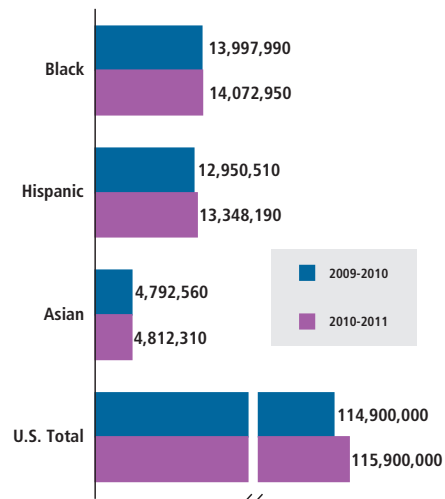
**SOURCE:** Centris

**SOURCE:** "Hispanic Market Overview," Centris, Bill Beaumont, President, 565 Virginia Dr., Fort Washington, PA 19034; 800-336-7674; www.centris.com. Price: Available online at no charge.

## Hispanics Represent Significant Growth Among TV Households

The number of American households with television service will increase 0.87% to reach 115.9 million for the Fall 2010-Spring 2011 viewing season, estimates Nielsen Company. Some 32.2 million TV households belong to emerging majorities. Hispanic TV households will once again post the largest increase, growing 3.07%, following a 2.30% increase in the 2009-2010 season. The number of Asian television households will grow 0.62%, whereas the number of Black TV households will increase 0.54%. Black households remain the largest racial/ethnic TV audience.

NUMBER OF HOUSEHOLDS WITH TELEVISION SERVICE, FALL 2010-SPRING 2011 VIEWING SEASON



**SOURCE:** Nielsen Company

The markets with the greatest increase in Hispanic households with TV in 2010-2011 are Philadelphia (up 8.0%) and Kansas City (up 7.7%). The fastest growing Black TV market is Kansas City (up 4.7%) and the fastest growing Asian TV market is Austin (up 3.7%).

**SOURCE:** "Television Households," Nielsen Company, Nic Covey, Director of Insights, 200 W. Jackson Blvd., #2700, Chicago, IL 60606; 312-385-6718; nic.covey@nielsen.com; www.nielsen.com. Price: Available online at no charge.

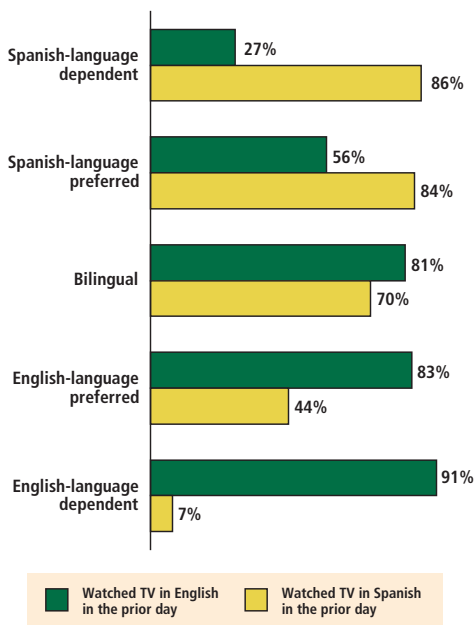
## Hispanics Split TV Viewing Between Spanish And English Programming

More than two thirds of Hispanics (68%) watched TV in Spanish in the prior day, and 64% watched TV in English in the prior day, according to Meneses Research. Nearly half of Hispanics (48%) say they watch an equal amount of Spanish- and English-language programming. Some 12% watch English-language programs all the time, and 13% most of the time. One in six (16%) watch Spanish-language programs all the time, and 11% most of the time.

Their viewing habits vary by region: East Coast Hispanics are the most likely to have watched Spanish-language TV in the prior day, whereas Central U.S. Hispanics (72%) are the most likely to have watched English-language TV in the prior day.

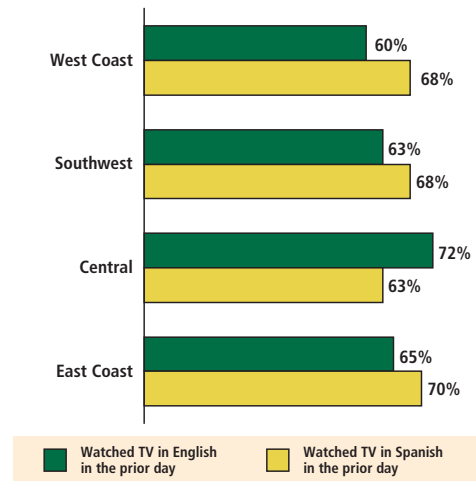
Not surprisingly, comfort and fluency in English and Spanish is reflected in viewing habits, though Hispanics watch TV in their non-dominant language for a variety of reasons, including to improve their speaking skills or because a family member wanted to watch a program in that language.

**HISPANICS' LANGUAGE PREFERENCES FOR VIEWING TV, BY FLUENCY, 2009**



**SOURCE:** Meneses Research

**HISPANICS' LANGUAGE PREFERENCES FOR VIEWING TV, BY U.S. REGION, 2009**



**SOURCE:** Meneses Research

**SOURCE:** "Ask U.S. Hispanics Consumer Profile Study 2009," Meneses Research, Walter Meneses, President, 1996 Frankfort St., San Diego, CA 92110; 619-200-7124; wmeneses@menesesresearch.com; www.menesesresearch.com. Price: \$595.

## Young Adults Use Tech To Watch What They Want When They Want

Live television continues to be the most common way Americans watch programs, but viewing habits of 18-29 year olds are dramatically different, according to Zogby and American Express. While 90% of adults overall watch live TV, 85% of 18-29 year olds do so. Young adults are significantly more likely to watch programming from DVDs (83% vs. 63% overall) and DVRs (59% vs. 47% overall). They are also more than twice as likely as adults overall to watch online on a network's website (69% vs. 33%) and online via a third party site such as Hulu.com (34% vs. 14%).

The disparities become even greater when considering the way they most frequently watch programs and their pre-

**HOW ADULTS MOST OFTEN WATCH TV, ALL ADULTS VS. 18-29 YEAR OLDS**

	ALL ADULTS	18-29 YEAR OLDS
Live TV	59%	42%
DVR recorded programs	20%	26%
On Demand (via cable or satellite)	7%	2%
Online via a network website	2%	4%
Online via a third party site (such as Hulu.com)	5%	15%
Online via a special connection (such as Netflix live stream or Xbox)	1%	3%
Via DVD	3%	4%
Other	1%	1%
None/not sure	2%	3%

**SOURCE:** Zogby

ferred way to view them. However, a key find is that although 18-29 year olds watch TV online, it is not their favorite way to do so. They prefer viewing programs on a TV set, though they are slightly more likely to prefer watching DVR programs than live TV.

**HOW ADULTS PREFER TO WATCH TV,  
ALL ADULTS VS. 18-29 YEAR OLDS**

	ALL ADULTS	18-29 YEAR OLDS
Live TV	47%	29%
DVR recorded programs	27%	30%
On Demand (via cable or satellite)	11%	9%
Online via a network website	2%	4%
Online via a third party site (such as Hulu.com)	3%	12%
Online via a special connection (such as Netflix live stream or Xbox)	2%	9%
Via DVD	2%	2%
Other	1%	3%
None/not sure	4%	3%

**SOURCE:** Zogby

**SOURCE:** "Alternatives To Live Television," Zogby, Stephanie DeVries, Managing Editor, 901 Broad St., Utica, NY 13501; 315-624-0200, x273; steph@zogby.com; www.zogby.com. Price: Call for information.

## Gaming Consoles Are Entertainment Hubs

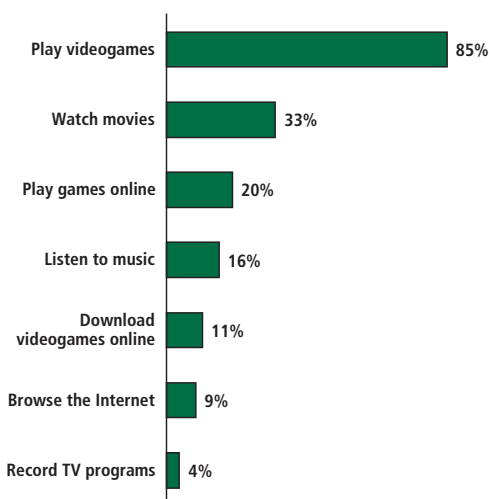
The majority of American households (52%) have a gaming console, according to Pricegrabber.com. They most commonly have a Wii (22%), followed by a PlayStation 2, an Xbox 360 (12%), a PlayStation 3 (9%), an Xbox (5%), or another console (2%).

Nearly half of Americans (46%) played videogames on their console or PC in the prior month, including:

- ▶ 66% of Gen Yers;
- ▶ 51% of Gen Xers;
- ▶ 43% of Baby Boomers; and
- ▶ 34% of those born prior to 1946.

One in three (30%) have used their videogame console to go online.

HOW VIDEOGAME CONSOLE OWNERS USE THEIR DEVICES, 2009



SOURCE: Pricegrabber.com

SOURCE: "Videogame Trends," Pricegrabber.com, Michelle Kane, Public Relations, 5150 Goldleaf Circle, 2nd Fl., Los Angeles, CA 90056; 323-601-1200, x289; mkane@pricegrabber.com; www.pricegrabber.com. Price: Available upon request at no charge.

## Videogame Console Base Grows On Price Cuts

The current generation of videogame console hardware has outsold the last by more than nine million units to date, according to the NPD Group.

Overall console hardware revenues declined 13% during 2009, a year that saw significant price cuts on Sony's PlayStation 3, the Nintendo Wii, and Microsoft's Xbox 360. The price cuts have spurred unit sales growth, however.

Overall hardware sales for the month of December jumped 16% year-over-year, NPD says. The month was the first in which Sony — which reduced the price of the PS3 by \$100 in September, to \$299 — sold more than one million PS3

consoles. The Wii, whose price fell to \$199 ahead of the holidays, also experienced its biggest-ever sales month in December, with 3.8 million consoles sold.

SOURCE: NPD Group, Anita Frazier, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita\_frazier@npd.com; www.npd.com. Price: Call for information.

## Gamers Spend More Time Playing In 2010

Gamers spend an average of 13.0 hours per week playing games, up from 12.3 hours in 2009, according to NPD Group. Extreme gamers represent the top 4% of those who play videogames, spending an average of 48.5 hours a week playing games. Gamers have an average age of 32, up slightly from 31 in 2009. The oldest segments of gamers are Avid Gamers (11% of gamers) and Offline PC Gamers (8%), both with an average age of 42.

The number of hours gamers spend using consoles and PCs to play games increased 9% and 6%, respectively, compared to 2009. Meanwhile, the number of hours they spend playing portable devices fell 16%.

SOURCE: "Gamer Segmentation 2010," NPD Group, David Riley, Director, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-2277; david\_riley@npd.com; www.npd.com. Price: Call for information.

## Ages 8-11 Are Key For Online Game Producers

The "sweet spot" for online gaming companies is 8-11-years-olds, according to M2Research and KidSay. Some 93% of tween girls and 91% of tween boys play online games.

Nintendo is the dominant handheld console among all gamers, though teen girls are significantly more likely than teen boys to play games on the Sony PSP (70% vs. 44%). Girl gamers select the *Mario Series* as their favorite game, while boys prefer *Call of Duty: Modern*

SOURCES: KidSay, Bob Reynolds, Research Director, 804 N. Meadowbrook Lane, #116, Olathe, KS 66062; 913-390-8110; bob@kidsay.com; www.kidsay.com

M2 Research, Wanda Meloni, 830 Stratford Knoll, Encinitas, CA 92024; 760-213-7939; wanda@m2research.com; www.m2research.com.

## Today's Youth Regularly Watch Online Video; Equate Online Ad With TV Spots

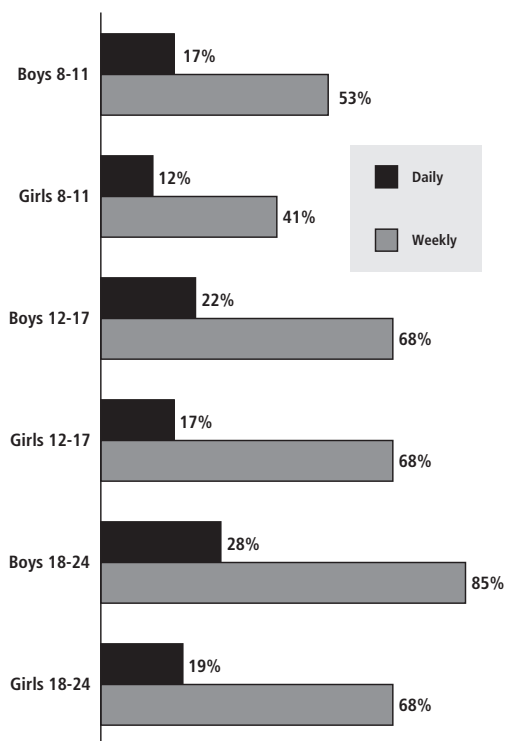
Two in three teens watch online video weekly, a 13% increase from 2009, according to Frank N. Magid Associates. Those aged 8-17 primarily watch user-generated video clips on sites such as YouTube as well as videogame content. Teen girls also tend to watch music videos, short web originals, TV and movie previews. Clips of TV shows are primarily viewed by boys 8-11 and girls 12-24. Full-length movies are primarily watched by those 18-24.

More than three in four regularly watch professionally produced segments, including music videos, movie trailers, news stories, and TV ads. The groups most likely to do so include teen girls 12-17 (84%) and boys 18-24 (85%).

Interestingly, girls 8-11 (48%) are more likely than any other female group to be interested in connecting a computer to their TV to watch online video. Four in 10 boys 8-11 (41%) would like the TV/computer connection, with 44% of boys 12-17 and 56% of boys 18-24 also interested in this set up.

A viewer's tolerance of online advertising peaks around ages 18-24. For instance, only 5% of those 8-11 feel online ads are more acceptable than TV spots — compared to 10% of girls 18-24 and 18% of boys 18-24.

FREQUENCY USERS WATCH ONLINE VIDEO, BY AGE GROUP



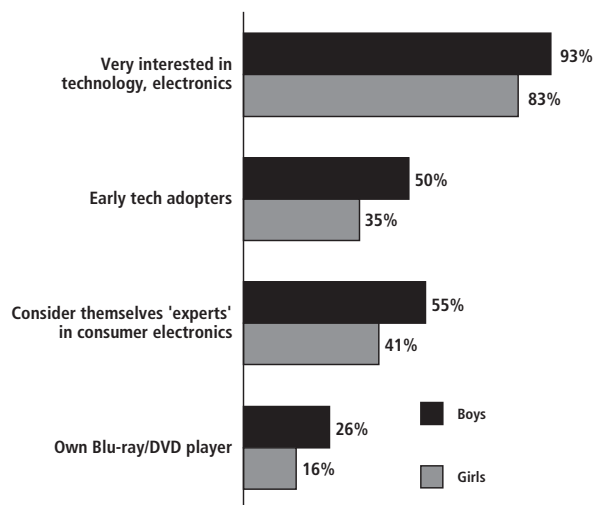
SOURCE: Frank N. Magid Associates

SOURCE: Frank N. Magid Associates, Mike Vorhaus, President, Magid Advisors, 1775 Broadway, #1401, New York, NY 10019; 212-974-2310; mvorhaus@magid.com; www.magid.com.

## 8-18-Year-Olds Consider Themselves Tech Experts

Nearly all teens (94%) are interested in music and movies, according to AOL and OTX. On average teens and young adults have gone to four concerts and 10 movies during the past year. They also don't mind watching movies again and again. Some 56% would purchase a DVD if they liked the movie they first viewed in the theater. This group is extremely tech-savvy. The majority of both boys (93%) and girls (83%) claim to be "very interested" in technology and electronics.

HOW TEENS FEEL ABOUT TECHNOLOGY



SOURCES: AOL, OTX

SOURCES: "Three Screen Nation: AOL Teen Study," AOL, Kurt Patat, Senior Communications Manager, 770 Broadway, 5th Fl., New York, NY 10003; 212-652-6323; kurt.patat@corp.aol.com; www.aol.com.

OTX, Nick Williams, Director Media & Entertainment Insights, 10567 Jefferson Blvd., Culver City, CA 90232; 310-736-3388; nwilliams@otxresearch.com.

## Teens Prefer Tunes With Mass Appeal

A song's popularity can sway a teen's opinion of it, according to research published by the journal *Neuroimage*. Researchers had teens rate short clips of music downloaded from MySpace. When teens were able to view a song's popularity, determined by the number of downloads, they changed how much they liked it 22% of the time. Furthermore, 79% of the ratings change was in the same direction of the general consensus.

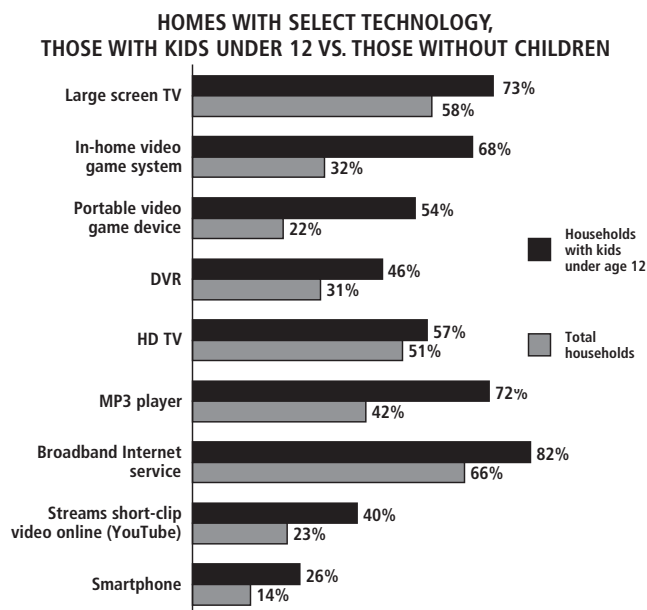
Without being able to view other people's opinions, teens switched their ratings only 12% of the time.



**SOURCE:** "Neural Mechanisms of the Influence of Popularity on Adolescent Ratings of Music," *Neuroimage*, Vol 49, Issue 3, Gregory S. Berns, Emory University School of Medicine, 404-727-2556; gberns@emory.edu.

## Tech More Likely In Homes With Kids

Households with children under age 12 are more likely than households without children to own large screen TVs, DVRs, broadband Internet service, and smartphones, according to Nielsen. Kid-centric homes are nearly twice as likely as those without children to possess an in-home video game system (68% vs. 32%) and stream short-clip videos online (40% vs. 23%).



**SOURCE:** Nielsen

**SOURCE:** Nielsen, Pete Blackshaw, EVP Digital Strategic Services, 1014 Vine St., Cincinnati, OH 45202; 513-618-6700; pete.blackshaw@buzzmetrics.com; www.nielsenbuzzmetrics.com.

## Teens Still Love Their Twilight Vampires

Three in four teens (78%) believe the *Twilight* saga franchise is "still hot," according to Buzz Marketing. It apparently conjures either love or hatred since only 11% really have no opinion. (The survey was taken in spring 2010, before the June 30 release of the third installment, *Eclipse*.)

### HOW TEENS FEEL ABOUT THE TWILIGHT SAGA FRANCHISE

Love it .....	44%
Like it .....	23%
It's okay/ no opinion .....	11%
Hate it .....	22%

**SOURCE:** Buzz Marketing

**SOURCE:** Buzz Marketing, Tina Wells, CEO, 1018 Laurel Oak Rd., #1, Voorhees, NJ 08043, 856-346-3456; tina@buzzmg.com; www.buzzmg.com.

## factoids

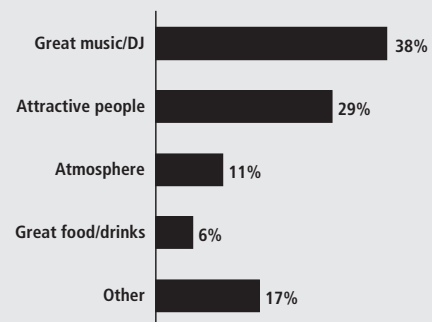
- ▶ Some 17% of Americans aged 13-54 have used a **videogame console** to view a DVD, including 27% of those aged 13-31. (*Knowledge Networks*; phone: 908-497-8040)
- ▶ Nearly eight in 10 **children aged 2-14** (79%) bought digital or physical content — such as videogames, music, movies, etc. — in 2009, with 85% of their spending going toward physical items, and 15% toward digital items. (*NPD Group*; phone: 516-625-2277)
- ▶ Singles most commonly think comedies make the best **date movies** (51%), followed by romances (29%) and thrillers (13%). (*RedBox*; phone: 630-916-3033)
- ▶ Most Americans (70%) would pay to get texts about upcoming shows and tickets to see their favorite **music artists**, and two thirds would pay to attend exclusive Internet gigs (67%) and for access to a members-only section of the artist's website (67%). (*Synovate*; phone: 312-526-4000)
- ▶ Those aged 18-29 are more likely than Americans overall to have watched **television programs** from a DVR (59% vs. 47%) and via On-Demand (51% vs. 46%). (*Zogby*; phone: 877-462-7655)
- ▶ Those who have **paid to download** music (49%) and TV shows or movies (42%) did so because they could have instant access to the content they sought. (*Lightspeed Research*; phone: 908-630-0542)
- ▶ The typical person with a broadband connection to the Internet spends an average of two hours a week watching **streaming or downloaded videos**. (*Parks Associates*; phone: 972-490-1113)
- ▶ Nearly half of Americans with **pay-TV service** (45%) chose their video/TV service provider because they received a special offer or discount. (*Heavy Reading*; phone: 619-229-9940)
- ▶ Most 15-17 year olds (82%) **watch TV programming online** — not including user-generated video — at least monthly, and 48% (double the proportion in 2009) watch on handheld devices. (*Horowitz Associates*; phone: 914-834-5999)
- ▶ PBS is the most trusted network for **news and public affairs information**, cited by 40% of viewers, and followed distantly by Fox News (29%) and CNN (27%). (*GfK Roper Public Affairs & Media*; phone: 703-739-5028)
- ▶ Some 178 million Americans watched **online video** in 2009, viewing an average of 187 videos and spending an average of 4.1 minutes viewing each video. (*comScore*; phone: 312-775-6538)
- ▶ More than half of **social gamers** (53%) are willing to watch a commercial video, complete a survey, or sign up for a subscription to receive points for the online games they play. (*Offerpal Media*; phone: 510-403-7319)
- ▶ More than two thirds of adults aged 25 and older (68%) expect to listen to more **terrestrial radio** in the future, including 22% who plan to do so following a recent positive experience listening to radio. (*Bridge Ratings*, phone: 818-291-6420)
- ▶ More than one in 10 households (11%) are considering cancelling their **pay-TV service** in part due to the availability of online video; however only 0.5% of households that have cancelled service watch five or more hours of online video per week. (*Parks Associates*; phone: 972-490-1113)
- ▶ **Sports programs** account for the smallest share of TV viewing at home (10.7%), but the largest proportions at work (28.6%) and in bars and restaurants (38.3%). (*Council for Research Excellence*; phone: 212-586-8806)
- ▶ Some 7% of 13-54 year olds have used a TV set to view **downloaded or streaming video** from the Web, including 11% of 18-34 year olds. (*Knowledge Networks*; phone: 908-497-8040)
- ▶ Households planning to purchase a **3D TV** in the coming three years are most interested in using the set to watch movies (65%), more than double the percentage that plan to play 3D video games (36%) or watch TV programs (33%). (*Consumer Electronics Association*; phone: 703-907-7668)

### FAST FACT

#### Key Elements Needed To Make A Teen Night Club Popular

Teens say great music and a DJ is what draws them to a teen night club, followed by attractive people, and atmosphere, according to ChaCha mobile answering service.

#### KEY ELEMENTS TO THE ULTIMATE TEEN NIGHT CLUB



SOURCE: ChaCha

SOURCE: ChaCha, Steven Goldstein, Chief Revenue Officer, 575 Broadway, 5th Fl., New York, NY 10012; 917-991-4334; steven.goldstein@chacha.com; www.chacha.com

- ▶ More than half of those who have an **MP3 player** have used the device to listen to music via their car stereo. (*Arbitron and Edison Research; phone: 410-312-8363*)
- ▶ Blacks (75%) are the most likely to **watch TV** within the hour before they go to bed, followed by Hispanics (72%), Whites (64%), and Asians (52%). (*National Sleep Foundation; phone: 202-347-3471*)
- ▶ People who own an **e-reader** are more likely than those who do not to read magazines (91% vs. 84%), and they read more magazines per month (13 vs. 11). (*Mediamark Research & Intelligence; phone: 212-884-9204*)
- ▶ People who stream **video content** on Hulu.com tend to watch more TV shows (93%) than movies (60%), compared to Netflix streamers, who tend to watch more movies (87%) than TV (68%). (*Interpret; phone: 310-255-0590, x346*)
- ▶ One in five Americans (20%) have **streamed a movie** in the prior month in October 2009, up from 6% in September 2008, and 13% downloaded a movie in the prior month, up from 5% over the same period. (*Ipsos; phone: 612-573-8520*)
- ▶ Of the 82% of **TV viewers who multitask** with their computers while watching shows, 31% would do so less if they had access to Internet applications from their TV set. (*FourthWall Media; phone: 646-419-0006*)
- ▶ Those who discover **online videos** on Facebook or Twitter spend the most time viewing them (1 minute, 45 seconds, and 1 minute, 44 seconds, respectively), compared to those who find them via Google (1 minute, 32 seconds) or Yahoo (1 minute, 28 seconds). (*TubeMogul; phone: 510-653-0501*)
- ▶ Of the **TV shows** that were canceled during the prior year, more viewers will miss *Law & Order* (24%), than *24* (12%), *Monk* (9%), or *Lost* (8%). (*Rasmussen Reports; phone: 732-776-9777*)
- ▶ Six in 10 **college students** (60%) use their PCs more than their TVs for entertainment. (*Dolby Laboratories; phone 415-645-5838*)
- ▶ More than six in 10 TV viewers (62%) have watched **time-shifted programming** in the prior year, up 61% from 2009. (*ICR; phone: 484-840-4300*)
- ▶ Consumers are streaming 11% more TV shows in 2010 than they did a year ago, and 40% of those who **stream TV shows** visited Hulu in the prior three months in order to watch TV shows. (*Interpret LLC; phone: 310-255-0590, x346*)
- ▶ Three in 10 people who have downloaded apps to their phone or wireless device (30%) have reduced their use of **handheld gaming devices**. (*Deloitte; phone: 212-492-4427*)
- ▶ Nearly half of American adults (43%) say they enjoy watching **classic films**. (*Turner Classic Movies; phone: 404-885-0797*)
- ▶ One in five Americans (20%) have **streamed a movie** in the prior month in October 2009, up from 6% in September 2008, and 13% downloaded a movie in the prior month, up from 5% over the same period. (*Ipsos; phone: 612-573-8520*)

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**WAYS IN WHICH RADIO LISTENERS HAVE EVER  
COMMUNICATED WITH A RADIO STATION OR DJ, 2010**

Phone .....	.22%
Text message .....	.8%
Facebook .....	.8%
Email .....	.7%
Twitter .....	.2%

**SOURCE:** Edison Research; phone: 908-707-4707

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# environment

The vast majority of Americans take part in eco-friendly activities, such as recycling. They do so not only to improve the environment, but to improve their quality of life and their communities.

A majority of Americans believe companies' green claims, though most also think that companies exploit these claims to drive sales. Eco-friendliness as a sales tactic is not having the effect it used to — Americans want to buy eco-friendly products, but in 2010 their budgets were less flexible to allow them to spend more for green items.

Rather than voting with their wallets, many consumers took their voices to the Internet, supporting causes via email or social media. They feel they are heard online and can see instant results. Two thirds of those who support a cause online say doing so keeps them informed of offline opportunities to be involved with the cause.

## It's Not Easy Being Green During A Recession: Eco-Friendliness Loses Allure As A Selling Point

Going “green” has survived the recession, but Americans’ interest in being eco-friendly has been weakened along with their budgets.

Nine in 10 Americans (90%) have incorporated some level of environmentally friendly habits into their daily lives, according to Burst Media. However, fewer than one in 10 (9%) are completely green.

Among those trying to be green, but still working at it (aka “aspirational greens”), 61% say their primary reason for doing so is to create a better environment. Women (65%) are more likely than men (52%) to be going green in an effort to improve the environment.

Among those who live their lives completely green, only 38% are doing so primarily to improve the environment. Their diverse reasons for going green include:

- ▶ Wanting to live a better quality of life (37%);
- ▶ Doing good for their community (35%);

- ▶ Wanting to make a difference (33%); and
- ▶ To set an example for others (32%).

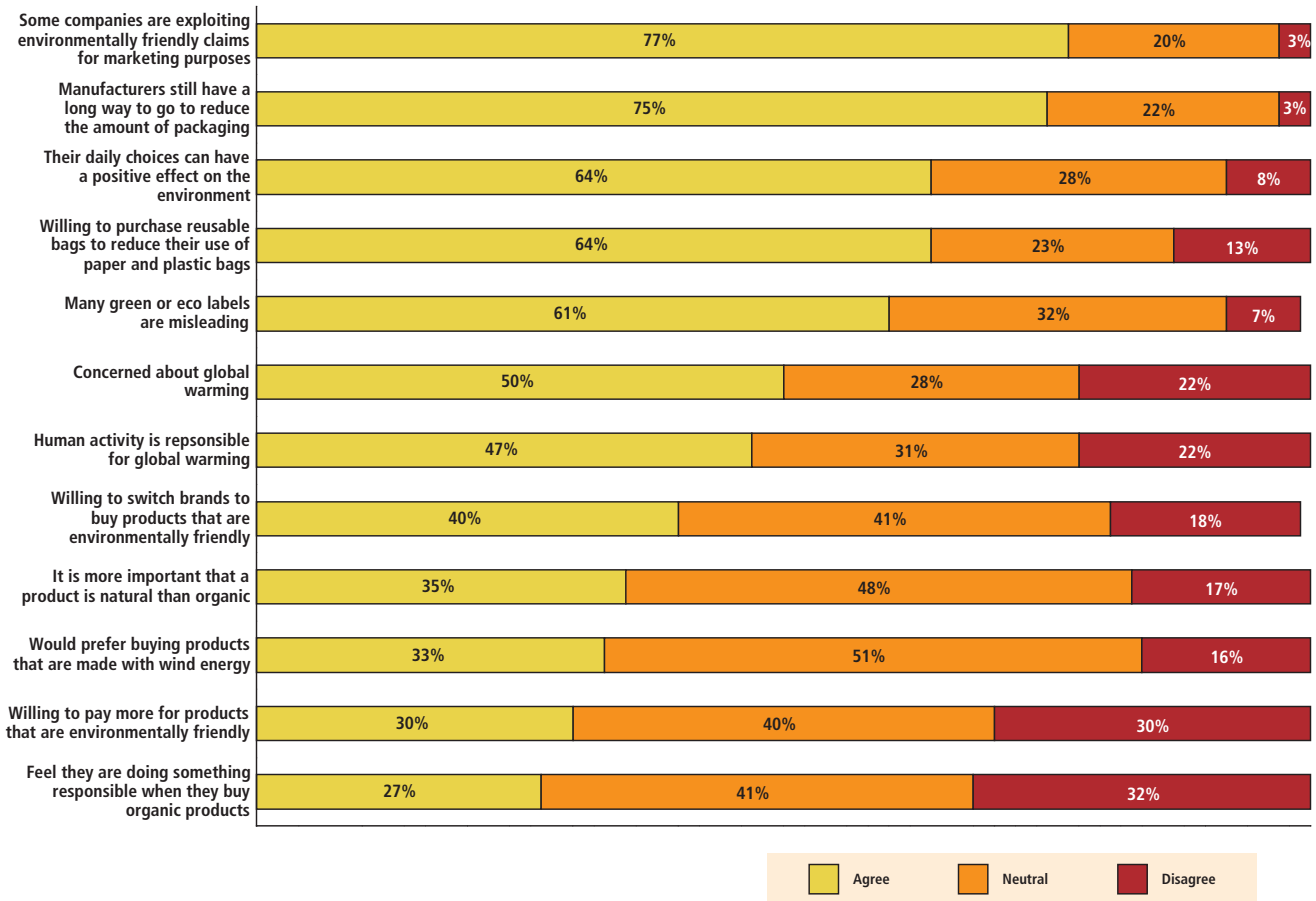
The vast majority of people (82%) notice advertising claims that a company or product is green or eco-friendly. Most (57%) believe such claims, though 52% are occasionally skeptical. Aspirational greens (68%) are more likely than those who are completely green (58%) and those who are not green at all (32%) to believe eco-friendly claims in advertising.

One in six (15%) say that green claims are confusing or misleading. Those aged 18-34 are least likely to think so, followed by those aged 35-54 (17%) and those aged 55 and older (20%).

More than three quarters of shoppers (77%) believe that companies exploit green claims for marketing purposes, according to *Better Homes & Gardens* and BrandSpark.

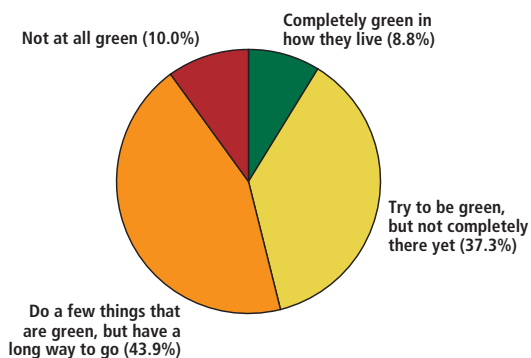
Slightly more than half of grocery shoppers (52%) say it is important that new products they buy are better for the environment, down from 63% a year ago. Fewer than half (47%) insist new products have eco-friendly packaging, also a decrease from the year prior. BrandSpark’s Robert Levy

AMERICAN’S ATTITUDES TOWARD THE ENVIRONMENT AND GREEN MARKETING, 2009



SOURCE: *Better Homes & Gardens*, BrandSpark

AMERICANS' ADOPTION OF ECO-FRIENDLY HABITS, 2010



SOURCE: Burst Media

explains that consumers have been “bombarded by green messaging” and are unclear as to the benefits, and therefore “consider the price premium unacceptable.”

One category where green does make a difference is household cleaning products. When shopping for new household cleaning products, shoppers say it is important that they:

- ▶ Are good for the environment (58%);
- ▶ Safer for their children (57%);
- ▶ Come in concentrated form and require less packaging (51%);
- ▶ Are made from natural ingredients (38%);
- ▶ Are made from organic ingredients (25%); and
- ▶ Include baking soda as an ingredient (23%).

The majority of grocery shoppers (59%) are concerned about chemicals in such products, but only 20% believe that organic home care products are effective. That is a disconnect that home care brands need to address because the primary reason that shoppers chose one such product over another is that it gets the job done (the first time, not after several tries).

Women, especially moms, tend to be more considerate of the environment than men in attitude as well as purchase decisions — largely explained by their concern about what sort of world they are leaving their children to manage.

Green moms can be lumped into five categories based on their eco attitudes, according to The Social Studies Group and Learned On.

**Super Green Moms** are typical “watchdog” parents. They use cloth instead of paper towels and eliminate plastic snack bags. They take reusable bags to do their shopping. They evaluate their home energy use to see where they can do better. Natural products are also their choice for cleaning: lemon juice, vinegar, and baking soda.

**Eco-Moderate Moms** are concerned about the environment, but are also juggling career, family, and other home responsibilities. They can be motivated to be more green by asking them to participate in a “challenge” program with other like-minded moms.

**Mainstream Green Moms** are philosophically on board with the green movement. They focus on singular purchase decisions, making those choices smarter and more eco-friendly for the benefit of their families, with the belief that they will make a difference overall. They are less likely to make drastic changes to become more green.

**Natural Parenting/Simple Lifestyle Moms** strongly consider themselves green and want their efforts to enhance family bonds (natural childbirth, breastfeeding, cloth diapers). They prefer an uncomplicated lifestyle that incorporates green values, such as local and organic foods.

**Green And Frugal Moms** are focused on living within their means. They weigh the additional cost of green products and farmers market foods against the value of preserving the environment. And they compensate for the additional cost by cutting back in other areas. They aren’t interested in green as trend; they hold it as a core belief.

**SOURCES:** “Consumers Willing To Spend More To Go Green,” Burst Media, Chuck Moran, Director Marketing, 8 New England Executive Park, Burlington, MA 01803; 781-852-5291; cmoran@burstmedia.com; www.burstmedia.com. Price: Available online at no charge.

*Better Homes & Gardens*, James Carr, VP/Group Publishers, 125 Park Ave., New York, NY 10017; 212-551-7110; james.carr@meredith.com; www.bhg.com. Also Maxwell Bonnie; 347-429-1403; mbonnie@bestnewproductawards.com.

“American Shopper Study,” BrandSpark, Robert Levy, President, 1075 Bay St., #1002, Toronto, Ontario, Canada M5S 2B1; 647-727-4576; rlevy@brandspark.ca; www.brandspark.ca. Price: Call for information

“The Green Mom Eco-Cosm,” The Social Studies Group, Wendy Goldman Scherer, Analyst, Washington, DC; 202-715-3884 x704; wscherer@socialstudiesgroup.com; www.socialstudiesgroup.com. Price: Call for information.

## Americans Go Green — And Support Other Causes — Online

Americans (60%) believe they have a great deal of responsibility to protect the environment, compared to 12% who think they have little responsibility, finds the Associated Press and NBC Universal. However, only a third (32%) thought a great deal about their impact that they have on the environment, compared to 37% who thought little about it.

Americans are nearly twice as likely to say that it is hard-

### ENVIRONMENTAL ACTIONS THAT AMERICANS ARE LIKELY TO TAKE, 2009

Recycle bottles and cans.....	85%
Buy energy-efficient household appliances.....	79%
Buy recycled paper products.....	77%
Turn down their thermostats by two degrees.....	77%
Washing laundry in cold water.....	74%
Install energy saving insulation in their homes.....	68%
Reuse water bottles.....	66%
Bring their own shopping bags to stores.....	63%
Carpool or take mass transit.....	46%
Eat less meat.....	41%
Buy a hybrid automobile.....	34%

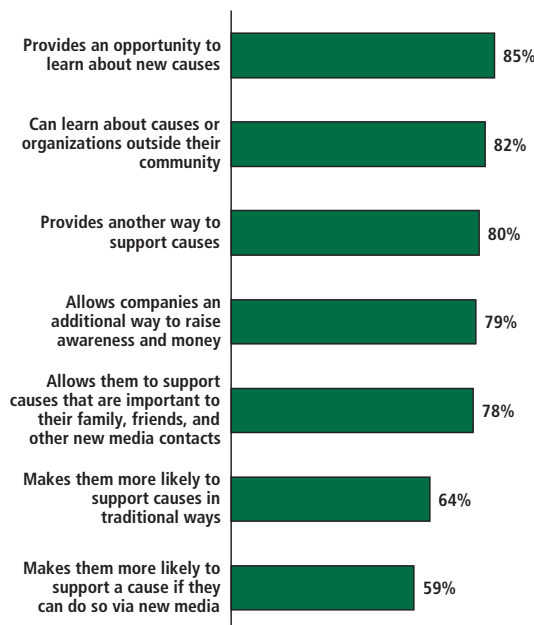
SOURCE: Associated Press and NBC Universal

**CAUSES AMERICANS WANT TO SUPPORT VIA NEW MEDIA, 2009**

Animal welfare	.29%
Health and disease	.28%
Education	.23%
Environment	.22%
Human rights/equal rights	.21%
Crime/violence prevention	.18%
Poverty/hunger/homelessness	.18%
Disaster relief	.17%
Economic development	.12%

SOURCE: Cone

**REASONS AMERICANS WOULD LIKE TO SUPPORT CAUSES VIA NEW MEDIA, 2009**



SOURCE: Cone

er for Americans to use less energy (65%) than to use less water (34%).

**New Media And Causes**

Most Americans (79%) would like companies to use new media — such as email or social networks — to raise awareness about causes, reports Cone. Six in 10 (60%) have used such media to support causes, including 33% who have done so via email, 32% via social networks, and 27% via social networks.

They are motivated to support causes through new media because:

- ▶ It allows them to choose which issue a company will support (79%);
- ▶ It is quick and easy (76%);
- ▶ There is an incentive for involvement (72%);
- ▶ They can see demonstrative results (70%); and

▶ They are connected to offline opportunities (66%). Those who do not support causes through new media abstain because:

- ▶ They would rather spend their time and/or money supporting causes offline (31%);
- ▶ They cannot see the impact or results (27%);
- ▶ They feel overwhelmed by the number of causes on new media (22%); and
- ▶ Their favorite issue, cause, or organization is not online (19%).

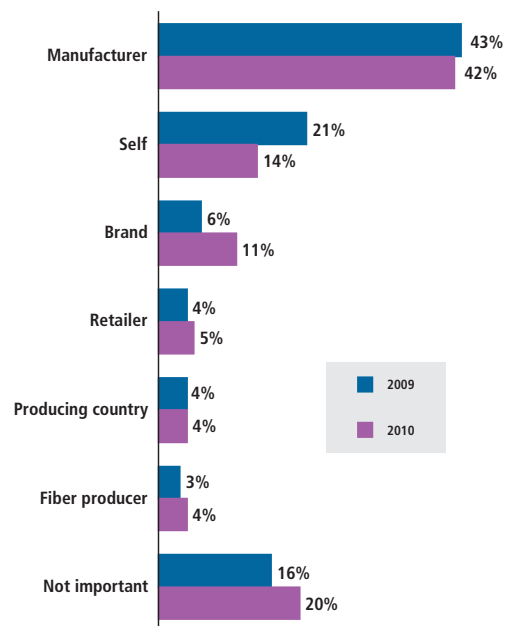
SOURCES: "2009 Cone Consumer New Media Study," Cone, Carol Cone, 855 Boylston St., Boston, MA 02116; 617-227-2111; cccone@coneinc.com; www.coneinc.com. Price: Call for information.

"Consumers And The Environment," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; info@ap-gfcpoll.com; www.ap-gfcpoll.com. Price: Available online at no charge.

**Green Garments: Shoppers Hold Manufacturers Responsible**

The vast majority of consumers engage in environmentally friendly activities that also benefit them in cost savings, such as conserving energy (80%) and buying energy saving appliances (74%), according to Cotton Incorporated. Nearly half (45%) are opting not to use plastic bags — which does not have an added economic incentive — up from 39% a year ago, and 28% are checking corporate environmental policies, up from 23%.

**ENTITY CONSUMERS WOULD HOLD RESPONSIBLE IF THEY PURCHASED A GARMENT THAT THEY LATER LEARNED WAS NOT PRODUCED IN AN ECO-FRIENDLY WAY, 2009 VS. 2010**



SOURCE: Cotton Incorporated



Shoppers would most commonly hold a manufacturer responsible if they bought an apparel item and later learned it was not produced in an eco-friendly way. They are less likely to blame themselves compared to a year ago, while they are more likely to blame brands or say that it would not matter to them.

**SOURCE:** "Shades Of The Green Consumer," Cotton Incorporated, Richmond Hende, VP Marketing, 488 Madison Ave., New York, NY 10022; 212-413-8340; rhende@cottoninc.com; www.cottoninc.com. Price: Call for information.

## factoids

- ▶ Nearly three quarters of consumers (73%) would be more likely to purchase a **home care product** if it were certified as being natural. (*Natural Products Association; phone: 202-641-3752*)
- ▶ One in 10 Americans (10%) believe that global warming's main impact will be on **farming**, compared to 5% of people globally. (*Synovate; phone: 212-293-6100*)

### FAST FACT:

#### Business & Environment

- ▶ The vast majority (71%) says companies have a significant responsibility to protect the environment, compared to 10% who say companies have no such responsibility.  
**SOURCE:** Associated Press and NBC Universal

# family

Parents spend a few hours a day with their children, but most wish they could spend more time with them. Most parents play with and praise their children a few times a day, but as their children get older, they do so less often.

When it comes time for discipline, parents most commonly talk to their children about what they did wrong. They are slightly more likely to tell kids they cannot go outside than that they cannot watch TV.

Many parents feel guilty that their children watch TV or DVDs because the parents are too busy to play with them. Parents have a significant influence over their children's media preferences — most daughters like the same TV and movies as their mothers, and the same goes for sons and fathers. Parents and kids have similar tastes in music, but to a lesser degree.

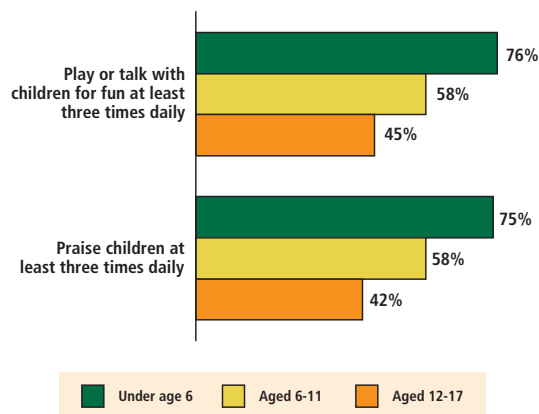
Most families eat together several times a week, and most meals are home cooked. Nearly half of families have the TV on during mealtime, and many say they are also interrupted by phone calls, texting, or other distractions.

Most new moms faced with finding childcare when they go back to work turn to family members. Parents with lower incomes also rely on family members to look after their children, whereas those with higher incomes use daycare centers and in-home care facilities.

## Parents Spend Less Time With Older Children

Most parents (59%) spend time playing or talking with their children just for fun at least three times a day in 2006 — the most recent year for which data is available — up from 50% in 1998, according to the U.S. Census Bureau. Nearly as many parents (58%) praise their child at least three times a day. Parents' interaction with their children decreases significantly as their children age.

PARENTAL INTERACTION WITH THEIR CHILDREN, 2006



SOURCE: U.S. Census Bureau

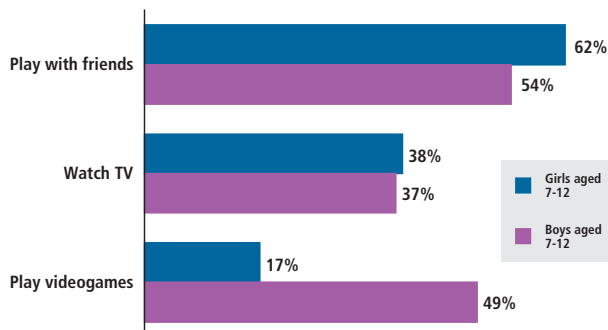
SOURCE: "A Child's Day," U.S. Census Bureau, Tom Edwards, Public Information Office, 301-763-3030; pio@census.gov; www.census.gov.

## Playtime Pressures: Parents Feel Guilty

Parents spend 16.8 hours in a typical week playing with their children aged up to 12 years, according to IKEA. Mothers (17.3 hours) spend more time than fathers (16.3 hours) playing with their kids.

Despite the amount of time they spend with their children, 48% of parents feel guilty that they do not spend enough time with their kids. Most (69%) would like more

CHILDREN'S FAVORITE FREE-TIME ACTIVITIES, GIRLS AGED 7-12 VS. BOYS AGED 7-12, 2009



SOURCE: IKEA

time to just "chill out" with their children. Four in 10 children (40%) would like their parents to spend more time playing with them. Among only children, that proportion rises to 48%.

Nearly half of parents (47%) think their children spend too much time watching TV or playing electronic games. This adds to their guilt, with 31% feeling bad that their children watch TV or DVDs because they are too busy to play with them. Children aged 7-12 prefer playing with friends to watching TV or playing videogames; however, videogames are a close second among boys, compared to a distant third for girls.

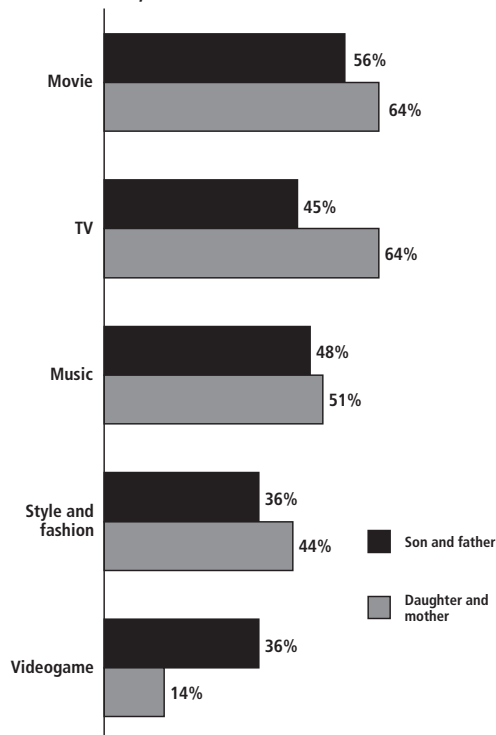
SOURCE: "Playreport USA," IKEA, Mona Astra Liss, Director Public Relations, 420 Alan Wood Rd., Conshohocken, PA 19428; 610-834-0180 x5852; mona.liss@memo.ikea.com; www.ikea-usa.com.

## Kids Share Similar Tastes With Parents

Today's children are close to their parents both physically and emotionally, according to Nickelodeon. The vast majority of parents (86%) eat dinner with their kids at least once a week, with an additional 51% worrying that they don't spend enough time with their kids.

Parents and children tend to enjoy being with one another. Hanging out and talking is the preferred family activity (83%), followed by watching TV (79%) and listening to music (63%).

SHARED INTERESTS, PARENT WITH CHILD OF SAME GENDER



SOURCE: Nickelodeon

These two groups also share similar tastes. For instance, 56% of boys like the same movies as their fathers, and two in three girls say their moms like the same TV shows they do. Importantly, “shared” videogame interest as “family time” isn’t about two people being in the same room. It’s more typically about a father and son competing online at different times and trying to top each other’s scores.

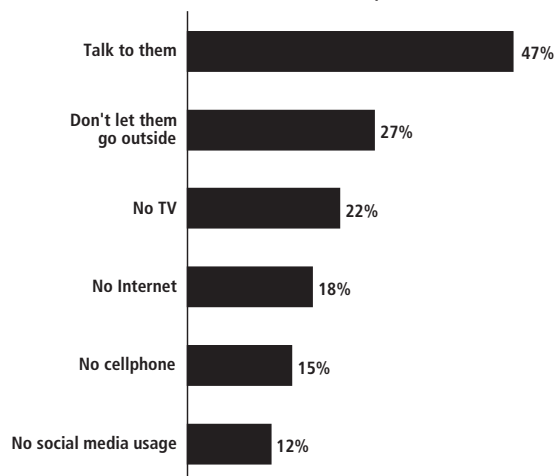
**SOURCE:** “Family GPS,” Nickelodeon, Ron Geraci, SVP Research, 1515 Broadway, 37th Fl., New York, NY 10036; 212-846-6000; ron.geraci@nick.com; www.nick.com.

## Parental Discipline Methods

Nearly half of all parents feel the most effective way to discipline their kids is to talk with them (44%), according to electronics review website Retrevo. Three in 10 (27%) believe kids learn their lessons most effectively if they are not able to go outside. Banning TV is used by two in 10 parents.

Parents of teens are stricter than parents of tweens when it comes to not allowing them to text at the dinner table (36% vs. 27%). However, the majority of parents haven’t set texting rules. Only one in three ban texting during family meals.

### MOST EFFECTIVE FOR DISCIPLINING CHILDREN, ACCORDING TO PARENTS



**SOURCE:** Retrevo

**SOURCE:** Retrevo, Vipin Jain, President/CEO, 440 N. Wolfe Rd., Sunnyvale, CA 94085; 408-524-1594; vipin@retrevo.com; www.retrevo.com.

## Families With Children Plan Their Shopping Trips On Sundays

The vast majority of Americans spend time on Sundays planning the shopping trips they will need to make during the week, but families with children are more likely than average to do so, reports *Parade* magazine.

Their entertainment activities are also different: 73% of

families with children buy or watch DVDs on Sunday, compared to 57% of those without children. Also, 59% of households with children play videogames on Sundays, compared to 48% of those without.

### SHOPPING NEEDS PLANNED ON SUNDAYS, HOUSEHOLDS WITH CHILDREN VS. HOUSEHOLDS WITHOUT CHILDREN, 2010

	WITH	WITHOUT
Consider grocery items needed for the week ahead	79%	70%
Consider personal care items needed for the week ahead	64%	56%
Plan stores to shop during the week ahead	64%	56%

**SOURCE:** *Parade* magazine

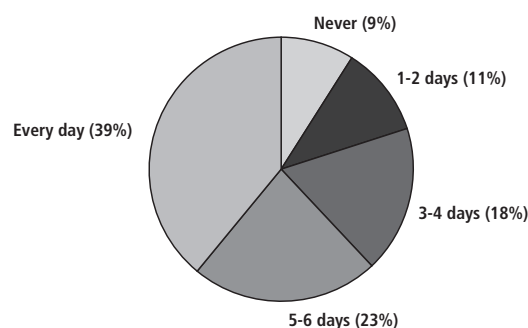
**SOURCE:** “Sunday In America,” *Parade*, Jim Hackett, SVP Marketing, 711 3rd Ave., New York, NY 10017; 212-450-7125; jim\_hackett@parade.com; www.parade.com.

## The Family That Eats Together Watches TV Together At The Table

Nearly four in 10 families (39%) eat dinner together every day, and only 9% never eat dinner together in a typical week, according to iVillage. During their dinners together, 45% say the television is often on in the same room where they are eating, 40% are often interrupted by phone calls, 15% listen to the radio or stereo at the same time, and 13% use their phones to text or email while at the table.

A third of families (34%) have a home-cooked meal every day, compared to only 4% who never make dinner at home during a typical week. The most common reasons for the paucity of home-cooked meals is because family members are either too tired or too busy at the end of a day.

### HOW OFTEN FAMILIES EAT DINNER TOGETHER PER WEEK, 2009



**SOURCE:** iVillage

**SOURCE:** “Family Dinner,” iVillage, Jodi Kahn, EVP, 900 Sylvan Ave., Englewood Cliffs, NJ 07632; 212-664-4444; jodi.kahn@nbcuni.com; www.ivillage.com.

## Kids Make Cooking Fun, But Only When Parents Have The Time

A similar percentage of homes with and without children claim to enjoy cooking (81% vs. 78%); however, families with

children are more likely than those without to say they like cooking only when they have time to do so (53% vs. 47%), according to Harris Interactive.

**SOURCE:** Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

### Working Moms Leave Baby With Family

Two in three women (66%) return to work following maternity leave, according to TheBump.com. Of these, most will leave their infants in the care of family members while 26% use childcare centers or daycare facilities.

#### CHILDCARE USED BY NEW MOMS ONCE THEY RETURN TO WORK

Family members .....	37%
Childcare centers/daycare facilities .....	26%
Family childcare (out of caregiver's home) .....	18%
Nanny/in-home childcare .....	10%

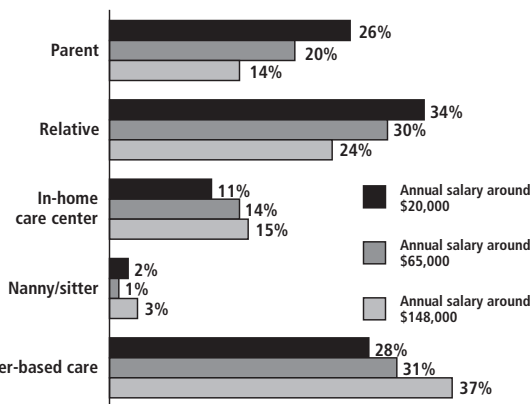
**SOURCE:** TheBump.com

**SOURCE:** The Knot (The Bump), Jacalyn Lee, 462 Broadway, #6, New York, NY 10013; 212-219-8555, x1013; jacalyn@theknot.com; www.theknot.com.

### Childcare High Earners Rely On Centers, Low Income Families Lean On Relatives

Families with the highest incomes are most likely to use center-based care for their children, according to the Center for American Progress and Center for WorkLife Law. Middle income families split between relying on relatives and using center-based care, while those earning less than \$20,000 a year rely most on parents and relatives.

#### CHILD CARE USED BY FAMILIES, BY INCOME LEVEL



**SOURCES:** Center for American Progress, Center for WorkLife Law

**SOURCES:** Center for American Progress, Heather Boushey, Senior Economist, 1333 H St., NW, 10th Fl., Washington, DC 20005; 202-682-1611; www.americanprogress.org.

### American Adoptions Of Foreign Children Are Decreasing

Adoptions of foreign children peaked in 2004 when nearly 23,000 children were adopted, according to the U.S. State Department. Since then, adoptions have slid to only 12,750 in 2009. Adoptive families are most commonly located in:

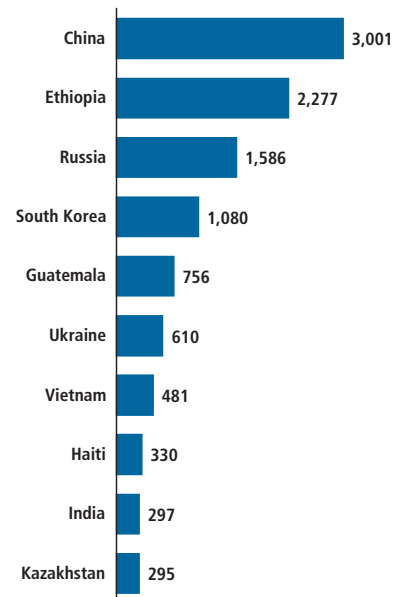
- ▶ Texas (650 adoptions);
- ▶ Illinois (571);
- ▶ Florida (543);
- ▶ Pennsylvania (513);
- ▶ Michigan (512);
- ▶ Ohio (464); and
- ▶ Minnesota (451).

More foreign children adopted by American families have come from China than any other country in four of the past five years, including 3,001 children in 2009. In 2008, 4,122 children were adopted from Guatemala, surpassing Chinese adoptions that year. Adoption numbers can be fickle year-to-year with various limitations placed on adoptions from certain countries, such as the halt on American adoptions from Russia in early 2010.

Between 1989 and 2009, more than 66,500 Chinese children have been adopted by American families, as were 53,100 Russian children, 34,100 South Korean children, and 32,856 Guatemalan children.

While overall adoption numbers have declined in recent years, the number of adoptions of children from African nations — including Ethiopia, Nigeria, Liberia, and Ghana — have steadily increased.

#### COUNTRY OF ORIGIN OF FOREIGN CHILDREN ADOPTED BY AMERICAN FAMILIES, 2009



**SOURCE:** U.S. State Department

These blended ethnic families present an entirely unique target for marketers. Depending on how they have been raised, they either shun their heritage or eagerly embrace it and wish to learn more about their origins.

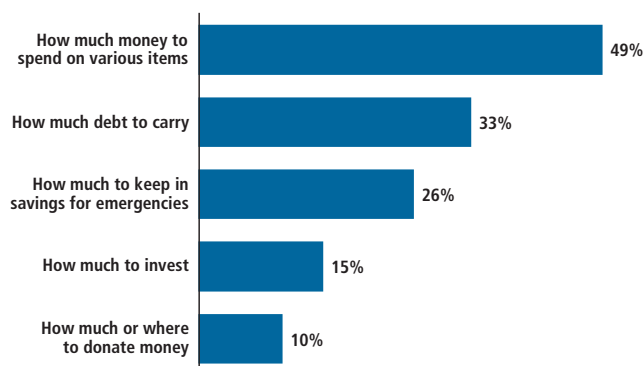
**SOURCE:** "Adoptions To The United States," U.S. State Department, Janice Jacobs, Assistant Secretary, Office of Children's Issues, SA-29, 2201 C St. NW, Washington, DC 20520; 888-407-4747; adoption.state.us. Price: Available online at no charge.

## Couples Duke It Out In Financial Fights

Nearly four in 10 married couples (39%) have arguments about finances, according to Matt Bell, financial author. Those who stick to a detailed budget (32%) are less likely than those without a budget (43%) to have such disagreements. Couples with children (50%) are more likely than those without (32%) to argue about money. The amount of time they have been married is not a significant factor, though couples that have been married 21 years or more (31%) are less likely than those who have been married for fewer years to have financial disagreements.

Of those who argue about money, 39% attribute their disagreements to different temperaments, 33% to their different family backgrounds and upbringings, and 31% to their different levels of financial knowledge.

### FINANCIAL ISSUES MARRIED COUPLES ARGUE ABOUT, 2010



**SOURCE:** Matt Bell

**SOURCE:** "Planning For Fewer Financial Fights With Your Spouse," Matt About Money, Matt Bell (author), Chicago, IL; 708-447-8022; matt@mattaboutmoney.com; www.mattaboutmoney.com.

## Parents More Likely To Be Friendly With Neighbors Than Non-Parents

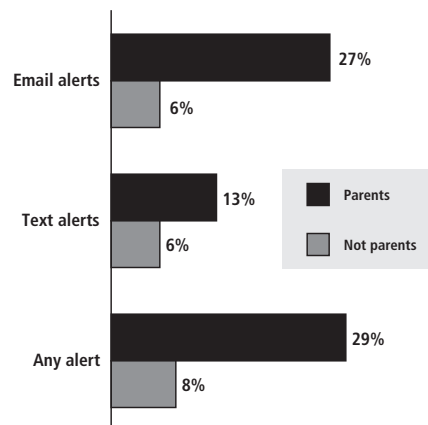
Parents are more likely than non-parents to meet with neighbors to discuss community issues (52% vs. 43%), according to the Pew Internet & American Life Project. Notably, there are no differences between urban, suburban, or rural neighbors.

Parents are also more likely than non-parents to have

exchanged emails with neighbors about issues in their community (17% vs. 11%).

Some 13% of adults have signed up to receive email or text message alerts about school events. Those age 30-49, college graduates, and households with an annual income exceeding \$75,000 are most likely to receive such alerts.

### ADULTS WHO RECEIVE TEXT OR EMAIL SCHOOL ALERTS



**NOTE:** Among adults who text and email

**SOURCE:** Pew Internet & American Life Project

**SOURCE:** Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org

## Grandparents Spoil Grandkids

"Seasoned" grandparents are more likely than first-timers to admit to spoiling their grandchild (65% vs. 55%), buying products the child's parents wouldn't buy (48% vs. 44%) and purchasing products they wouldn't have let their own children have (46% vs. 35%), according to market research firm Focalyst and Grandparents.com. In total, first-time grandparents spend more on grandchildren than those who have more than one (\$1,882 vs. \$1,501).

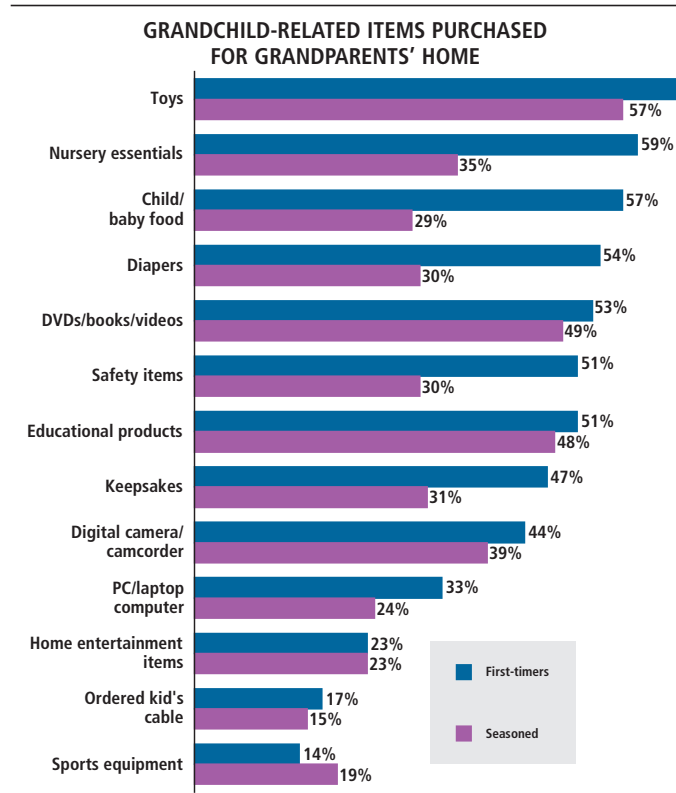
While half of grandparents (45%) focus on their grandchild's first year in terms of spending, nearly four in 10 (37%) look ahead to that child's college years, with older grandparents more likely to be future-focused.

The amount invested by grandparents is primarily based on income: 17% of first-time grandparents with incomes over \$100,000 expect to invest at least \$25,000 for their grandchild; 19% of first-timers with incomes under \$50,000 plan to invest \$5,000-\$25,000.

The Internet is the top resource grandparents — both first-timers and seasoned pros — turn to for information. They also seek input from friends or family members and magazines. They are least likely to rely on blogs or networking sites.

Grandmothers, in particular, are apt to become brand ambassadors about grandkid-related goods, with 71% telling

others about products they like; 51% of grandfathers do the same.



SOURCE: Focalyst, Grandparents.com

SOURCES: Focalyst, Jackie Bartolotta, Director of Market Intelligence, 909 Third Ave., 8th Fl., New York, NY 10022; 212-548-7254; jackie.bartolotta@focalyst.com; www.focalyst.com.

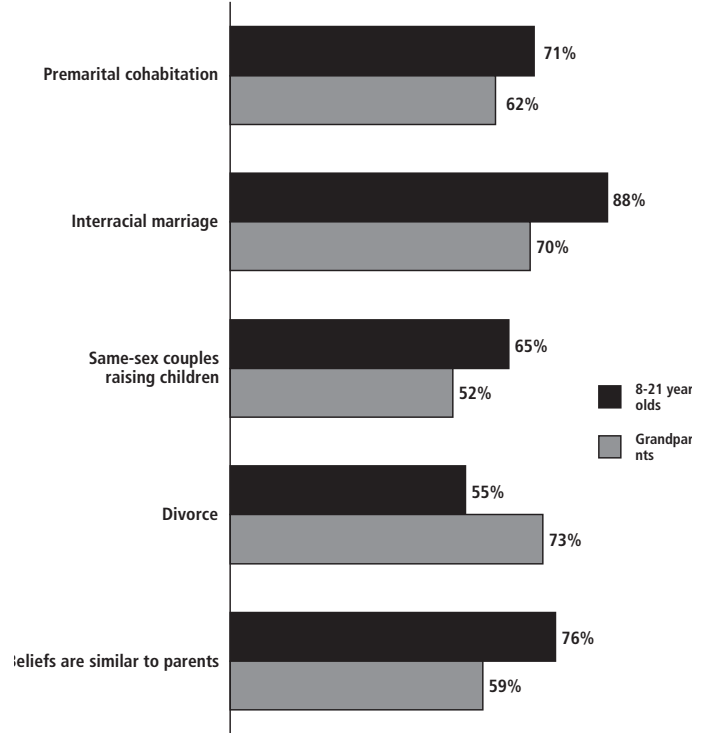
Grandparents.com, Jerry Shereshewsky, CEO, 226 W. 52nd St., Penthouse, New York, NY 10019; 212-307-0533; bizdev@grandparents.com; www.grandparents.com.

## Grandparents And Grandkids Form Tight Bonds, But Don't Expect Money

Although the image of a grandmother as a blue-haired older woman persists, the reality is that the average grandma is only 48 year old, still working, and close to both her adult child and grandchild, according to Nickelodeon. In fact, three in 10 see their grandchildren at least once a week and an additional 28% don't think they spend enough time together.

Nevertheless, today's grandparents are less willing to spoil their grandkids. Nine in 10 grandparents (90%) will not help with a down payment on their grandkids' home and 58% will not pay for their first car. However, they are willing to pay for love. While two in three parents (66%) will not pay for their bride's wedding, 74% of grandparents say they will foot the bill for the bride-to-be.

## ACCEPTANCE OF CURRENT MORALITY, 8-21 YEAR OLDS VS. THEIR GRANDPARENTS WHO SAY IT'S OKAY



NOTE: The same-sex question was asked of only kids 13-21

SOURCE: Nickelodeon

The number of girls under age 21 who believe their generation is held to "high expectations" is nearly as high as the number of grandparents who believe that today's girls are held to high standards (21% vs. 11%). Grandparents are also more likely than today's boys to feel the younger generation has more career opportunities (53% vs. 45%).

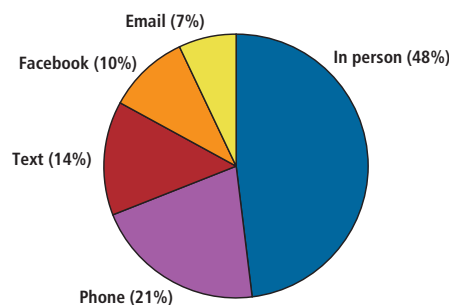
SOURCE: "Family GPS," Nickelodeon, Ron Geraci, SVP Research, 1515 Broadway, 37th Fl., New York, NY 10036; 212-846-6000; ron.geraci@nick.com; www.nick.com.



## factoids

- More than three quarters of **parents** (76%) say that consumer electronics — such as TV, iPods, and videogame consoles — enhance the time they spend with their children as a family and encourages bonding. (*Memorex; phone: 651-704-3288*)
- Couples that have difficulty conceiving (61%) hide their **fertility troubles** from friends and family, with 54% claiming it is easier to tell others they are not planning to have children than to discuss their situation. (*Merck; phone: 908-423-5042*)
- Parents would like to have more “**family nights**” with their children, but 21% say their kids aren’t interested in doing so. (*Memorex; phone: 651-704-3288*)
- More than one in 10 adults (11%) lost a **parent** before the age of 20, and two thirds continue to think about their parent frequently, regardless of when their parent died. (*Comfort Zone Camp; phone: 804-683-4090*)
- More than four in 10 **couples with children** (43%) have not had a date without their kids in three months or more, and 18% have not gone out alone since having had children. (*Sittercity; phone: 312-436-0952*)
- More than four in 10 **couples with children** (43%) have not had a date without their kids in three months or more, and 18% have not gone out alone since having had children. (*Sittercity; phone: 312-436-0952*)
- Nearly four in 10 couples (39%) sometimes have **arguments about finances**, including 43% who do not use a budget. (*Matt Bell and Crosswalk.com; phone: 708-447-8022*)
- Most parents (58%) tell their **children** to address other adults as Mr. or Mrs., while the other 42% think it is okay for them to use their first names. (*Parenting; phone: 212-779-5113*)
- Despite spending an average of \$440 on school supplies for their children aged 7-12 and an average \$479 for children aged 13-17, 80% of mothers are looking forward to sending their children **back to school** at the end of summer break. (*Marketing To Moms Coalition; phone: 954-943-2322*)
- Eight in 10 parents (80%) are not worried about **childhood obesity** affecting their own children, though 66% are worried about the epidemic on a national scale. (*Synovate; phone: 312-526-4359*)
- When **married women** earn 60% or more of their family’s income, they are 38% more likely than average to get divorced. [FAMILY, WOMEN] (*Jay Teachman, study author, Western Washington University; phone: 360-650-7214*)
- Economic factors contributed to a higher-than-average rise in cohabiting **unmarried couples** between 2009 and 2010, with the number topping 7.5 million in 2010, up from 6.7 million. (*U.S. Census Bureau, phone: 301-763-3030*)
- Men who have recently become **fathers** say they have difficulty sticking to an exercise routine (45%) and maintaining friendships (38%) since having children. (*Manofthehouse.com and Procter & Gamble; phone: 513-698-4607*)

SHARE OF GEN Y MOMS’ COMMUNICATION WITH THEIR FAMILIES, BY METHOD, 2010



SOURCE: WhyMomsRule.com/Bohan; phone: 615-327-1189



# finance

Americans have turned over a new leaf when it comes to finances in the wake of the recession. They are moving their money to smaller banks as they take a stand against national banks' policies and fees. They are reigning in debt and increasing their savings. They are turning to social networks and financial blogs for advice on investments. Investors have a more favorable view of putting money in mutual funds or savings accounts than they do of buying stocks or real estate.

Workers approaching retirement age are nervous about outliving their money, driving many to consider working longer. Men and lower-income Americans are most confident about being able to maintain their standard of living throughout their retirement years.

Emerging majorities were hit hard during the recession, but they are optimistic about their financial futures. Their collective buying power continues to grow.

Hispanics most commonly turn to family, friends, or books for advice about money, with few saying they talk to a financial planner. Spanish-dominant Hispanics are more likely than English-dominant Hispanics to feel uninformed about how to save and invest money for the future.

Blacks are making a greater effort to save money for their retirement, but some have been hindered by job loss or giving or loaning money to a family member. Blacks are more likely than Whites to say they save or invest money to prepare for a future emergency or to send their children to college. Whites are more likely than Blacks to save or invest for their retirement. Fewer Blacks are investing in the stock market than in recent years, and among those who do, they are investing significantly less.

## Americans Wise Up About Credit And Debt

The majority of adults know their credit score (69%) and credit card interest rates (83%), according to Lending Club. This is an improvement compared to pre-recession 2007, when 45% did not know their credit score, and 29% did not know the interest rate on their most often used credit card.

While most credit card users (93%) are aware they can negotiate for lower interest rates, only 29% have tried. The majority (63%) carry cards with an interest rate of 14% or higher, and 31% have cards with a rate of 20% or higher.

Nearly nine in 10 adults (87%) have debt other than a home mortgage. Of those, 67% have credit card debt, and 48% have auto loan debt. Nearly a quarter (24%) owe \$20,000 or more. Young adults aged 18-34 (93%) are more likely to have debt than those aged 55 and older (83%). However, credit card debt is more common among those aged 55 and older (73%) than those aged 18-34 (60%). More than a quarter of 18-34 year olds plan to take out a loan in the next six months. They intend to use the money to:

- ▶ Buy a car (37%);
- ▶ Pay for education expenses (32%); or
- ▶ Buy or refinance a home (22%).

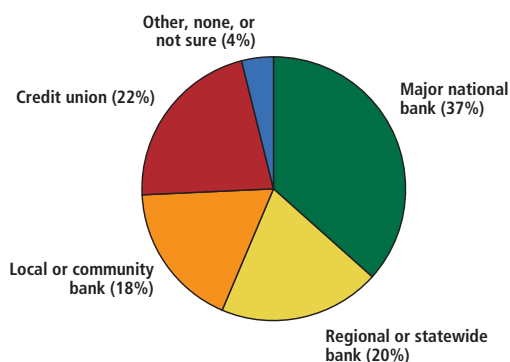
**SOURCE:** "Consumer Credit Survey," Lending Club, 370 Convention Way, Redwood City, CA 94063; 866-754-4094; pr@lendingclub.com; www.lendingclub.com.

## Moving Money: Large Banks Losing Customers To Community Banks

A third of adults with bank accounts (32%) have considered moving their account from a large national bank to a community bank or credit union because they are unhappy with the policies or behavior of national banks, according to Zogby. Another 14% have already moved some of their banking business from a large bank to a community bank or credit union.

Where Americans bank is largely driven by the type of community in which they live: 46% of those in cities use a

WHERE AMERICANS BANK, 2010



**SOURCE:** Zogby

large national bank for their primary banking needs, compared to 33% in suburbs, and 18% in rural communities.

**SOURCE:** "Banking Survey," Zogby, Stephanie DeVries, Managing Editor, 901 Broad St., Utica, NY 13501; 315-624-0200, x273; steph@zogby.com; www.zogby.com. Price: Call for information.

## Customer Service Counts At Banks

The majority of Americans are satisfied with their banks (70%), brokerage firms (64%), and credit card companies (60%), according to comScore. While satisfaction with banks has held steady over the past three years, consumers are less satisfied with their credit companies, which were at 65% in 2008. Satisfaction with brokerages has recovered after a slump to 58% in 2009 during the height of the recession.

When selecting an institution at which to open a new checking or savings account, consumers base their decisions on:

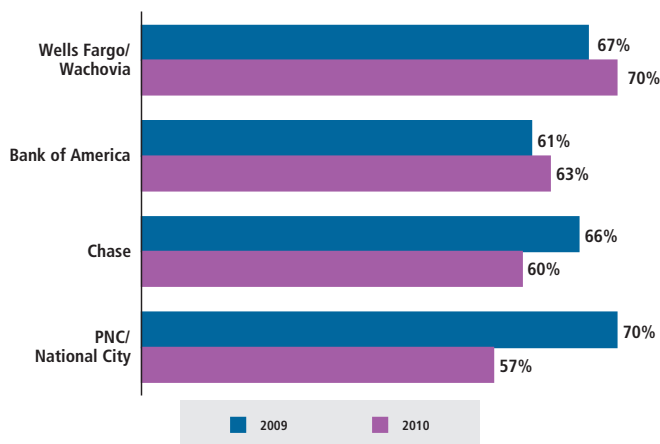
- ▶ Availability of free checking (67%);
- ▶ Low minimum balance (37%);
- ▶ Proximity of ATMs and branches (36%);
- ▶ Availability of bill pay tools (24%); and
- ▶ Quality of customer service (22%).

Each of the above attributes are at similar levels as in 2009, except for customer service, which grew more than five fold from only 4% a year ago.

Although bill pay tools rank relatively low in customers' decisions about where to bank, 64% use online bill pay and 52% use automatic or recurring bill pay.

Only 4% use online personal financial management sites, and only 30% are interested in such sites.

CUSTOMERS' SATISFACTION WITH THEIR BANKING INSTITUTIONS, 2009 VS. 2010



**SOURCE:** comScore

**SOURCE:** "2010 State Of Online Banking," comScore, Marc Trudeau, 11950 Democracy Dr., #600, Reston, VA 20190; 703-376-6667; mtrudeau@comscore.com; www.comscore.com. Price: Available online at no charge.

## Deducing Deductions: Taxpayers Are Confused About Job Expenses, Unemployment Benefits

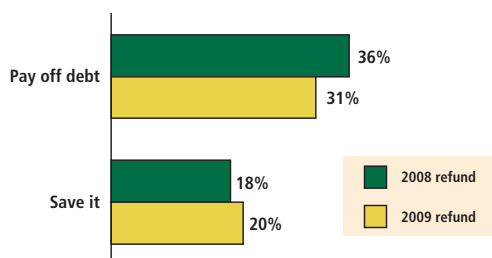
The majority of Americans will seek professional help when they file their tax returns from either a tax preparer (33%) or CPA (24%), according to H&R Block and Ipsos. Another 15% will get help from family or friends when they file. Fewer than a quarter will do their returns themselves, either online (13%) or using computer software (11%).

Most taxpayers (56%) say that losing their job would have the greatest impact on their taxes, but only 22% would think about their taxes after becoming unemployed. In addition, few are aware of how that affects their taxes. For example, only a minority know they can deduct job-related expenses, including:

- ▶ Gas mileage (37%);
- ▶ Moving costs (34%);
- ▶ Resume help (17%); and
- ▶ Wardrobe purchases (17%).

While their knowledge of taxes related to unemployment has improved over the prior year (presumably because a greater proportion have been unemployed during that time), 30% believe that they do now owe taxes on income from unemployment benefits. Another 32% believes they owe taxes on the full amount of benefits they receive, when in fact they owe only after a certain amount.

WHAT AMERICANS PLAN TO DO WITH THEIR TAX REFUNDS, 2009 VS. 2008



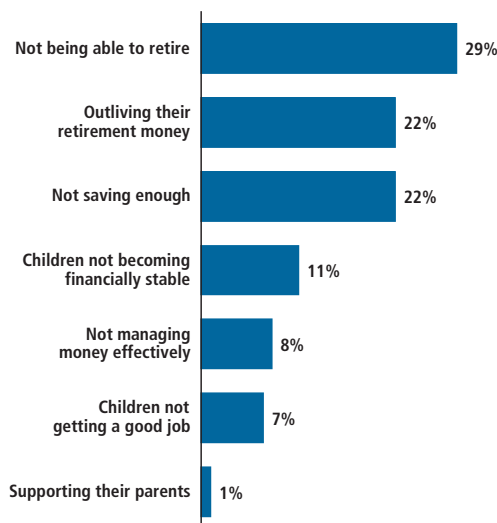
SOURCE: Ipsos

SOURCE: "Poll Of American Taxpayers Points To Poor Understanding of Laws That Could Affect Their Liability," Ipsos, Nicolas Boyon, SVP, 1700 Broadway, 15th Fl., New York, NY 10019; 646-364-7583; nicolas.boyon@ipsos.com; www.ipsos-na.com.

## Sandwich Generation Feels Pressure From Adult Children

The Sandwich Generation are mid-life adults with adult children (aged 23-28) and aging parents. One in six (16%) provides some sort of financial assistance to both a parent and an adult child, finds Charles Schwab. They are more concerned about their children not become financially independent (11%) than about supporting their parents (1%).

SANDWICH GENERATION ADULTS' GREATEST FINANCIAL CONCERNS, 2010



NOTE: Sandwich Generation Members are Mid-Life Adults with Children aged 23-28 and aging parents.

SOURCE: Charles Schwab

Nearly four in 10 (38%) say their children are more reliant on them than they were at the same age, and 64% believe their children are not concerned about being a financial burden on their parents.

A slight majority (52%) says their adult children are fully financially independent; 34% expect their children to be independent by age 30, 8% by age 35, and 2% by age 40. Some 4% are worried their children may never become financially independent. Parents say that college debt (32%) and unemployment (31%) are the most common reasons their children are not supporting themselves. A quarter (25%) acknowledge that overspending has led their children to rely on them, and 19% cite consumer debt.

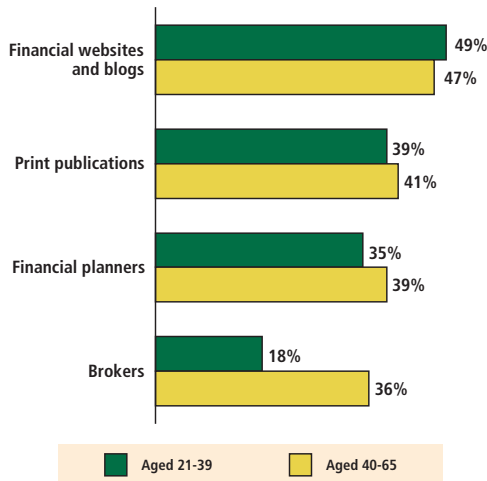
Sandwich Generation parents are somewhat more likely to place importance on saving for retirement (56%) than on helping their children financially (44%). [FINANCE, FAMILY]

SOURCE: "2010 Families & Money Survey," Charles Schwab, Sarah Bulgatz, 211 Main St., San Francisco, CA 94105; 415-667-0328; sarah.bulgatz@schwab.com; www.schwab.com. Price: Available online at no charge.

## Young Financial Investors Are Optimistic

More than four in 10 21-39 year olds (43%) plan to invest more money in 2010 than they did in 2009, compared to 33% of those aged 40-65, according to ING. Nearly half of young investors (48%) believe they need more than \$500 to begin investing in the market. Three in 10 (30%) credit their parents for encouraging them to invest.

**SOURCES AMERICANS USE TO MAKE INVESTMENT DECISIONS, 21-39 YEAR OLDS VS. 40-65 YEAR OLDS, 2010**



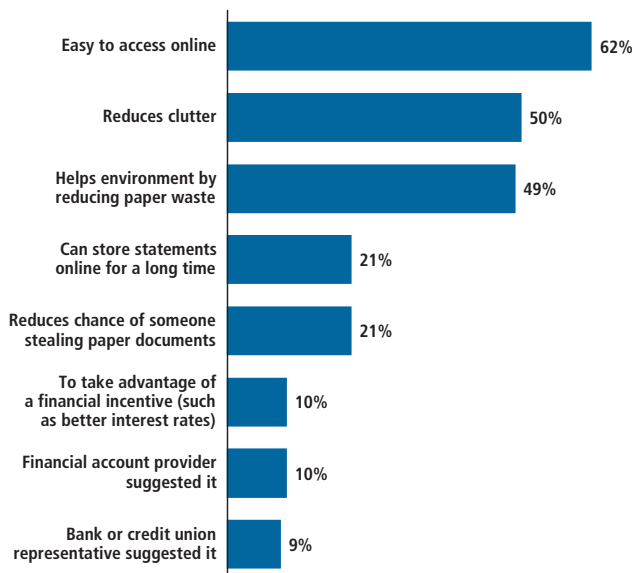
SOURCE: ING

SOURCE: "ShareBuilder Survey," ING, Steve O'Halloran, 1 S. Orange St., Wilmington, DE 19801; 302-467-6643; sohalloran@ingdirect.com; www.ingdirect.com.

**Young Americans Lead Online Bill Revolution**

While paying bills online has become more and more common, only a minority of Americans receive *all* of their household bills online, according to NACHA: The Electronic Payments Association. Those aged 18-24 (45%) are the most

**REASONS AMERICANS CHOOSE TO RECEIVE BILLS ELECTRONICALLY INSTEAD OF ON PAPER, 2010**



SOURCE: NACHA: The Electronic Payments Association

likely to have all of their bills sent electronically, followed by 42% of 25-34 year olds, 32% of 35-44 year olds, 25% of 45-54 year olds, and 21% of those aged 55 and older.

Mobile phone and student loan bills are the most common received electronically (49% each), while utility bills are among the least (32% for gas and electric and 24% for water).

A third of Americans (32%) are in favor of companies automatically ceasing to send paper bills once they have viewed or payed a bill online, while 29% are neutral on the matter, and 39% are against it.

SOURCE: "PayItGreen Survey," NACHA: The Electronic Payments Association, Colleen Morrison, 13450 Sunrise Valley Dr., #100, Herndon, VA 20171; 703-622-9159; cmorrison@nacha.org; www.nacha.org.

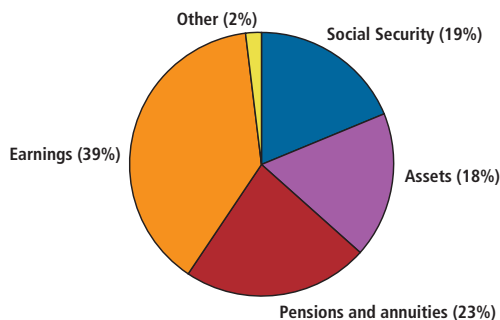
**Social Security Accounts For Lion's Share Of Older Americans' Income**

Social Security accounted for an average of 40% of income for Americans aged 65 and older in 2008, the most recent year for which data are available, according to the Employee Benefit Research Institute. About a quarter of their income (26%) is from earnings, 20% from pensions and annuities, and 13% from assets.

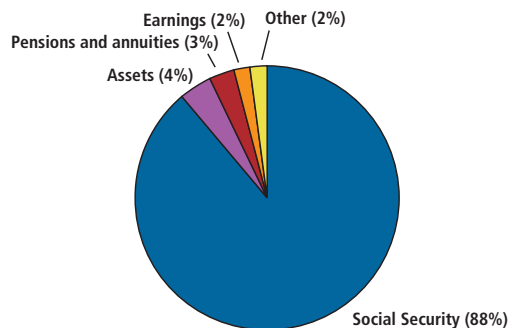
Older Americans' dependency on Social Security varied by income level, with those in the lowest earning quintile (with an annual income less than \$8,956) relying most heav-

**INCOME SOURCES OF AMERICANS AGED 65 AND OLDER, HIGHEST EARNING VS. LOWEST EARNING QUINTILE, 2008**

HIGHEST EARNING QUINTILE



LOWEST EARNING QUINTILE



SOURCE: Employee Benefit Research Institute

ily on it, and those in the highest quintile (with an annual income more than \$38,468) relying on it the least. Social Security accounts for a larger portion of older women's income (48%) than older men's income (34%).

**SOURCE:** "EBRI Notes," Employee Benefit Research Institute, 1100 13th St. NW, #878, Washington, DC 20005; 202-659-0670; info@ebri.org. Price: Call for information.

## Many Americans Get Federal Financial Aid

Nearly half of Americans (44.4%) received financial benefits from a government program in 2009, according to the U.S. Census Bureau. About one in seven (14.9%) receive social security, 1% received unemployment compensation, and 1% received veterans' compensation. Nearly a third (31.5%) qualified for a means-tested program, including:

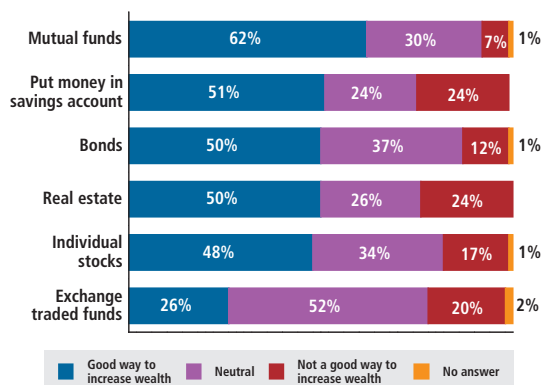
- ▶ Medicaid (23.8%);
- ▶ Food stamps (9.9%);
- ▶ Women, infants, and children (WIC) (6.2%);
- ▶ Federal supplemental security income (4.7%);
- ▶ Public or subsidized rental housing (3.9%);
- ▶ Temporary assistance for needy families (TANF) (1.9%); and
- ▶ Other cash assistance (0.8%).

**SOURCE:** "Economic Characteristics of Households In The U.S., Third Quarter, 2008," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

## Investors Favor Mutual Funds To Increase Their Wealth

Most American investors (61%) have not made any changes to their investments — buying or selling stocks or mutual funds — during the prior year, according to the Associated Press and CNBC. One in seven (15%) made only one change in investments, 12% made 2 or three changes, and

INVESTORS' ATTITUDES TOWARD TYPES OF INVESTMENTS, 2010



**SOURCE:** Associated Press and CNBC

10% made four or more changes. The remaining 4% were unsure how many changes they had made.

Investors are most likely to say that investing in mutual funds is a good way to increase wealth, whereas fewer than half think investing in individual stocks is a good idea, and even fewer think exchange traded funds are a good idea.

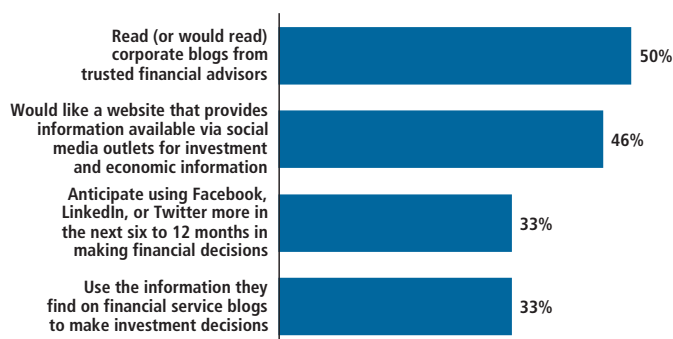
**SOURCE:** "Investors Survey," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; surveys.ap.org. Price: Call for information.

## Investors Turn To Social Media For Advice

Most investors would use social media as a source of information for developing an investment strategy, according to Spectrem Group. Nearly three quarters (74%) would use a blog, and 71% would use LinkedIn. Fewer would use Twitter (49%), YouTube (36%), or Facebook (31%). Most would use a blog or LinkedIn to learn about new financial products (77% and 69%, respectively), and nearly as many would use the same sites for buy and sell advice (69% and 61%, respectively).

When selecting a financial service advisor, 38% of investors would consider how much they communicate with customers via social network in their decision. Those younger than age 35 (46%) are more likely than their older peers to say so.

INVESTORS' USE OF SOCIAL MEDIA IN INVESTMENT DECISIONS, 2010



**SOURCE:** Spectrem Group

**SOURCE:** "Social Media and the Investor," Spectrem Group, Randy Wostratzky, Business Development Manager, 641 W. Lake St., #402, Chicago, IL 60661; 312-454-3327; rwostratzky@spectrem.com; www.spectrem.com. Price: 3,800.

## Unemployment Is Worst Among Poor Families

The unemployment rate of American households increases as income decreases, which has been a trend since prior to the recession, according to a study from the Center for Labor Market Studies. While being unemployed for a period would automatically push a person down along the income segments, the income measure includes income from all

household members and all sources, such as unemployment insurance, so those who lose their jobs aren't likely to fall too far down the spectrum.

**UNEMPLOYMENT RATES BY HOUSEHOLD INCOME, Q4 2007 VS. Q4 2009**

	Q4 2007	Q4 2009
Less than \$12,160	18.4%	30.8%
\$12,160-\$20,725	10.7%	19.1%
\$20,726-\$29,680	7.5%	15.3%
\$29,681-\$39,000	5.6%	12.2%
\$39,001-\$50,000	4.0%	9.0%
\$50,001-\$63,000	3.7%	7.8%
\$63,001-\$79,100	3.3%	6.4%
\$79,001-\$100,500	2.4%	5.0%
\$100,151-\$138,700	2.0%	4.0%
More than \$138,700	1.6%	3.2%

SOURCE: Center for Labor Market Studies

SOURCE: "Labor Underutilization Problems of U.S. Workers Across Household Income Groups at the End of the Great Recession," Center for Labor Market Studies, Andrew Sum, Director, Northeastern University, 315 Holmes Hall, 360 Huntington Ave., Boston, MA 02115; 617-373-2242, a.sum@neu.edu; www.clms.neu.edu

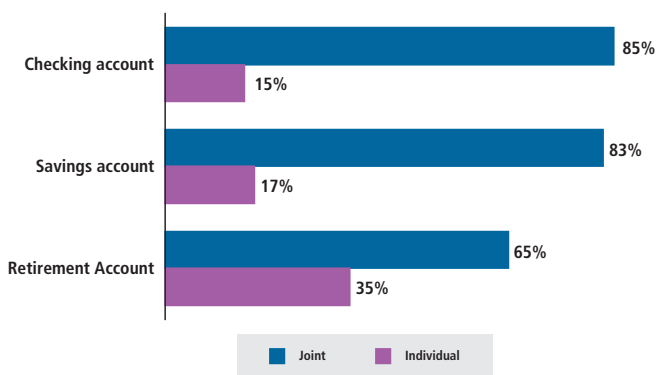
### Couples Merge Their Money Matters

Finance is the most common source of stress in a relationship, cited by 30% of couples, according to American Express. It is followed distantly by issues relating to intimacy (11%), arguments about children (9%), and disagreements about in-laws (4%).

More than nine in 10 coupled adults (91%) find excuses to avoid talking about money with their partners. Fewer than half (43%) discussed money prior to marriage. However, that proportion jumps to 57% among affluent couples. Only 12% have never discussed money with their partner.

On average, coupled adults feel the freedom to make purchases up to \$275 — they consult their partner for more expensive items. For affluents, the threshold is a bit higher:

**COUPLES WITH JOINT VS. INDIVIDUAL CHECKING, SAVINGS, AND RETIREMENT ACCOUNTS, 2010**



SOURCE: American Express

\$395. Even though they consult their partner on expensive purchases, 46% have bought something their partner did not approve of. More than a quarter (27%) have misrepresented the amount of a purchase, and 30% have hidden purchases.

Two thirds of couples (66%) share all monthly expenses, and most maintain joint checking and savings accounts. Most couples (57%) also claim equal responsibility for debt, and 55% say they and their partners have an equal amount of debt.

SOURCE: "Spending & Saving Tracker," American Express, Lisa Gonzalez, 200 Vesey St., New York, NY 10285; 212-640-2851; lisa.a.gonzalez@aexp.com; www.aexp.com.

### Money Matters: Men Vs. Women

Most adults (68%) agree that women are better than men at managing household finances, according to ING. However women are more likely to be upset about gaining weight (30%) than accumulating debt (27%). Men, on the other hand, worry more about amassing debt (34%) than pounds (24%).

When it comes to investing in the market, six in 10 (60%) say men are better than women. Men (29%) are more likely than women (18%) to feel confident in investing in the stock market or putting money into retirement accounts. Overall, just 13% have no qualms about investing. The financial activities that intimidate most adults are:

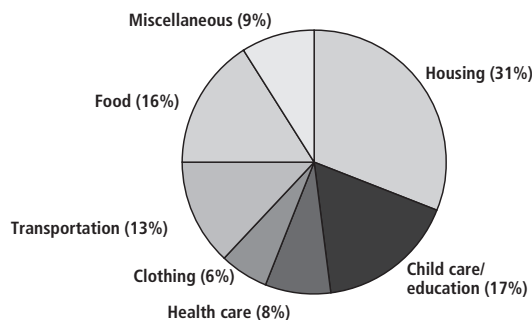
- ▶ Investing in the stock market (50%);
- ▶ Doing their taxes (34%); and
- ▶ Completing mortgage applications (24%).

SOURCE: "ShareBuilder Survey," ING, Steve O'Halloran, 1 S. Orange St., Wilmington, DE 19801; 302-467-6643; soholloran@ingdirect.com; www.ingdirect.com.

### The Cost Of Raising A Child

It's no secret that it's expensive to raise kids. A middle-income, two-parent family could expect to spend \$222,360 raising a child to age 18, up only 1% from 2008, the smallest increase this decade, according to USDA Center for Nutrition Policy and Promotion. It costs the most to raise a child in the

**WHERE THE MONEY GOES IN RAISING A CHILD TO 18, 2009**



SOURCE: USDA Center for Nutrition Policy and Promotion



Northeast and West, followed by Midwest, South, and rural areas. Most of the regional difference relates to housing, child care and education expenses.

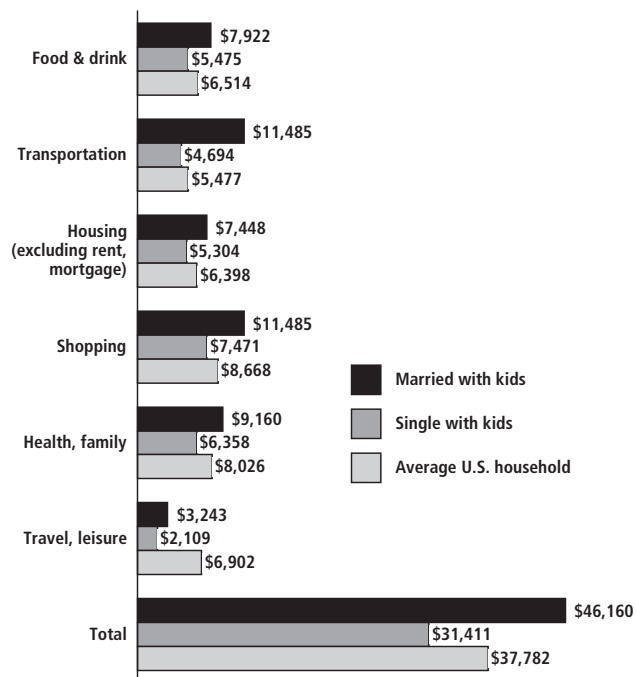
Only direct parental costs are included; college costs and expenses after age 17 aren't included. Expenditures on children by people outside the household and by the government are also excluded, as are indirect costs to parents such as time, foregone earnings and lost career opportunities.

**SOURCE:** "Expenditures on Children by Family, 2009," by Mark Lino, USDA Center for Nutrition Policy and Promotion, 3101 Park Center Dr., #1034, Alexandria, VA 22302; 703-305-7600; info@cnpp.usda.gov; www.cnpp.usda.gov.

## It Costs Nearly \$50,000 A Year To Raise Kids

Families with kids spend \$46,160 on expenses each year, with transportation (\$11,485) and shopping (\$11,485) comprising most of their expenditures, according to financial website Bundle.com. Single parents spend significantly less than married parents each year (\$31,411), with shopping (\$7,471) and health and family related expenses (\$9,160) taking up most of their annual budgets.

ANNUAL SPENDING, MARRIED & SINGLE WITH KIDS



**SOURCE:** Bundle

**SOURCE:** "How America Spends," Bundle, Janet Paskin, Managing Editor, janet@bundle.com; www.bundle.com.

## Kids Cost A Lot From The Very Beginning

The average mom spends \$3,342 on her baby during the first year, excluding gifts, on items including redecorating expenses, baby-proofing, announcements, food, and clothes, according to TheBump.com's Pregnancy and Baby Study.

Four in 10 moms (39%) spend more than \$3,000. Moms also receive items as gifts, with strollers, baby monitors, diapers, and car seats as the products most likely to be received as presents.

AMOUNT SPENT ON BABY DURING THE FIRST YEAR

Less than \$500	6%
\$500-\$999	13%
\$1,000-\$1,499	13%
\$1,500-\$1,999	12%
\$2,000-\$2,999	16%
\$3,000-\$3,999	12%
\$4,000-\$4,999	8%
\$5,000-\$7,499	11%
\$7,500-\$9,999	4%
>\$10,000	4%
<b>AVERAGE</b>	<b>\$3,342</b>

**NOTE:** Includes redecorating expenses, baby-proofing, announcements, books, toys, clothes, food, travel items Does not include gifts.

**SOURCE:** TheBump.com

**SOURCE:** TheBump.com, Jacalyn Lee, 462 Broadway, #6, New York, NY 10013; 212-219-8555, x1013; jacalyn@theknot.com; www.theknot.com.

## Everyday Expenses Pose Greatest Threat To College Savings, Say Parents

Three in 10 parents (29%) say the rising cost of food, gas, and other daily necessities is the greatest obstacle in saving for their child's college education, followed by job loss/income reduction (18%), and fear of having started too late to save enough (16%), according to Futuretrust Mastercard and Harris Interactive.

Nine in 10 parents (90%) expect their children to contribute at least in part to their own college tuition.

**SOURCE:** Futuretrust, Judie Ashworth, 456 N. 5th St., Philadelphia, PA 19123; 215-873-2283; jashworth@desinationmaternity.com; www.futuretrust.com.

## Emerging Majorities' Buying Power Reaches \$1.6 Trillion

Americans' buying power tops \$11.1 trillion in 2010, and is projected to increase 27% to \$14.1 trillion by 2015, according to the Selig Center for Economic Growth. The buying power of emerging majorities rose to \$1.6 trillion in 2010, and is projected to reach \$2.1 trillion in 2015.

### Hispanic Buying Power

Hispanic buying power is \$1 trillion in 2010, up 108% from 2000 and projected to grow to \$1.5 trillion in 2015. Hispanics account for 11% of the nation's total buying power, which is less than the 15% of the population accounted for by Hispanics. The relatively young age of the Hispanic population, as compared to those of other races and ethnicities, means that Hispanics are less likely to be in their peak earning years, so their proportion of the nation's buying power stands to grow in the coming years.

The states with the largest Hispanic markets in terms of buying power are:

- ▶ California (\$265 billion);
- ▶ Texas (\$176 billion);
- ▶ Florida (\$107 billion);
- ▶ New York (\$81 billion);
- ▶ Illinois (\$44 billion);
- ▶ New Jersey (\$39 billion);
- ▶ Arizona (\$34 billion);
- ▶ Colorado (\$22 billion);
- ▶ New Mexico (\$20 billion); and
- ▶ Georgia (\$17 billion).

### Black Buying Power

Black buying power is \$957 billion in 2010, up 60% from 2000 and projected to grow to \$1.2 trillion in 2015. Blacks account for 8.6% of the nation's total buying power, which is less than the 12.3% of the population accounted for by Blacks. The Black population is nearer the average age of Americans overall, meaning they are as likely as average to be in their peak earning years. Therefore, their share of buying power is less likely than Hispanics' or Asians' to increase.

The states with the largest Black markets in terms of buying power are:

- ▶ New York (\$91 billion);
- ▶ Texas (\$72 billion);
- ▶ Georgia (\$66 billion);
- ▶ California (\$64 billion);
- ▶ Florida (\$63 billion);
- ▶ Maryland (\$57 billion);
- ▶ Illinois (\$46 billion);
- ▶ North Carolina (\$44 billion);
- ▶ Virginia (\$42 billion); and
- ▶ New Jersey (\$36 billion).

### Asian Buying Power

Asian buying power is \$544 billion in 2010, up 98% from 2000 and projected to grow to \$775 billion in 2015. Asians account for 4.9% of the nation's total buying power, which is slightly more than the 4.3% of the population accounted for by Asians. Asians are a relatively young demographic, and like Hispanics, their share of buying power will grow in the coming years.

The states with the largest Asian markets in terms of buying power are:

- ▶ California (\$172 billion);
- ▶ New York (\$54 billion);
- ▶ Texas (\$34 billion);
- ▶ New Jersey (\$34 billion);
- ▶ Illinois (\$24 billion);
- ▶ Hawaii (\$23 billion);
- ▶ Washington (\$18 billion);
- ▶ Florida (\$17 billion);
- ▶ Virginia (\$17 billion); and
- ▶ Massachusetts (\$14 billion).

**SOURCE:** "The Multicultural Economy, 2010," Selig Center for Economic Growth, Jeff Humphreys, Director, University of Georgia, PO Box 1764, Athens, GA 30603; 706-425-2962; jhumphreys@terry.uga.edu; www.selig.uga.edu. Price: \$125.

## Hispanics Are Vulnerable Financially Due To Lack Of Informed Advice

More than three quarters of Hispanic adults (77%) say the recession increased their desire to provide a financial safety net for their families, according to New York Life Insurance Company. Those with an income of \$50,000 or more (87%) and with some college education (87%) were more likely than average to say so.

Spanish-dominant Hispanics (54%) are more likely than English-dominant Hispanics (37%) to say they do not have a financial safety net because they lack information on how to plan for financial protection. Spanish-dominant Hispanics (34%) are also more likely than English-dominant Hispanics (23%) to say they simply have not considered the need for such a safety net.

If their family's primary breadwinner were no longer able to work, 36% of Hispanics say their financial needs would be met by a family member taking on a new job, compared to 25% who would rely on life insurance, and 20% on retirement savings. Those aged 18-54 (39%) are more likely than those aged 55 and older (20%) to say a family member would take on a new job. Older Hispanics (31%) are more likely than those under age 55 (18%) to say they would rely on retirement savings.

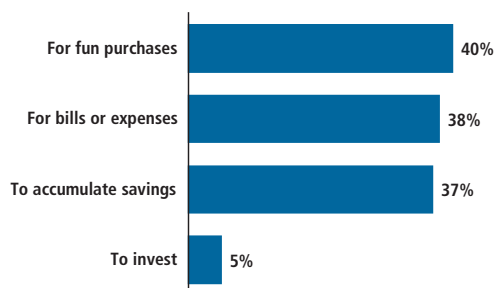
**SOURCE:** "Hispanic Financial Planning Survey," New York Life Insurance Company, Juan Job, Hispanic Market Manager, 51 Madison Ave., New York, NY 10010; 212-576-6509; juan\_job@newyorklife.com; www.newyorklife.com. Price: Available online at no charge.

## Saving And Spending: Hispanics Monitor Both To Stay On Budget

Nearly all Hispanics (95%) are saving money in 2010, according to Coinstar. Most (71%) put money into savings accounts, and 55% accumulate change in a piggy bank or other container. About two thirds of Hispanic men (65%) put a portion of their income into savings each month; on average, they save 14% of their salary. Fewer women (59%) save a portion of their income, and they also average less, putting 10% into savings each month.

The vast majority of Hispanics who are taking a new approach to finances in the coming year are planning to save more (89%), compared to only 8% who expect to spend more. Nearly six in 10 (59%) reevaluate their household expenses each week to make sure they're staying on track.

REASONS HISPANICS ACCUMULATE LOOSE CHANGE AT HOME, 2010



SOURCE: Coinstar

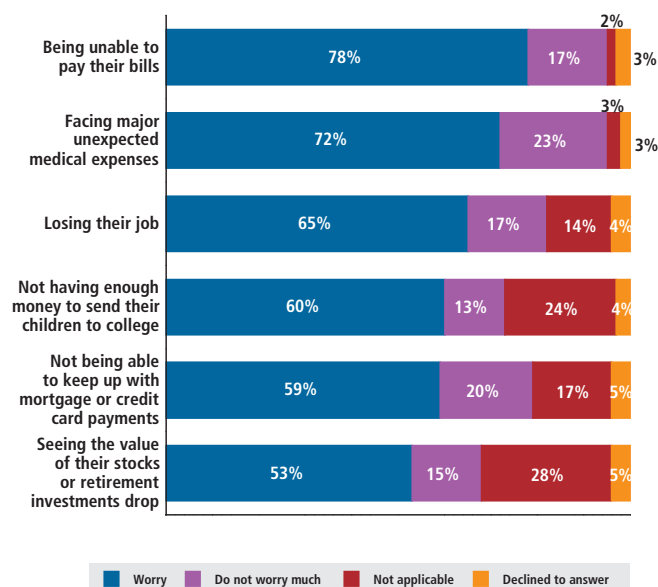
SOURCE: "Hispanic National Currency Poll," Coinstar, Sarah Jones, 1800 114th Ave SE, Bellevue, WA 98004; 425-943-8121; sjones@coinstar.com; www.coinstar.com. Price: Available online at no charge.

## Hispanics' Financial Concerns And Expectations For The Next Generation

Hispanics in the U.S. want to assimilate American culture while also maintaining their unique traditions and culture. A majority of Hispanics (54%) believe it is "very important" that they change to blend into the larger American society, but 66% also think it is "very important" to maintain their distinct Hispanic culture, according to Univision and the Associated Press.

Their assimilation of American culture is reflected in their expectations of their children. Most Hispanic parents expect their children to attend college, while only 43% say their own parents expected as much of them. The vast majority want their daughters to attend a four-year college (74%) or community college (9%) after high school, compared to 6% who think she should get a job and 1% who think she should get married. Most also want their sons to attend a four-year college (71%) or community college (7%), compared to 9% who think he should get a job and 1% who think he should get married.

HISPANICS' FINANCIAL CONCERNS, 2010



SOURCE: Univision and Associated Press

Hispanic parents believe that it will be easier for the next generation to find a good job (57%) and buy a house (51%). They are less optimistic about raising a family in the future, with 43% believing their children will have an easier time than they did and 36% saying it will be more difficult.

Hispanic workers put in an average of 38.4 hours a week at their jobs, with 70% working 40 or more hours in a typical week. Nearly nine in 10 (89%) work one job, and 8% work two jobs. More than four in 10 (44%) were affected by a job loss in their family in the period since September 2009: 13% lost a job themselves, 27% say a family member lost a job, and 4% say both they and a family member lost jobs.

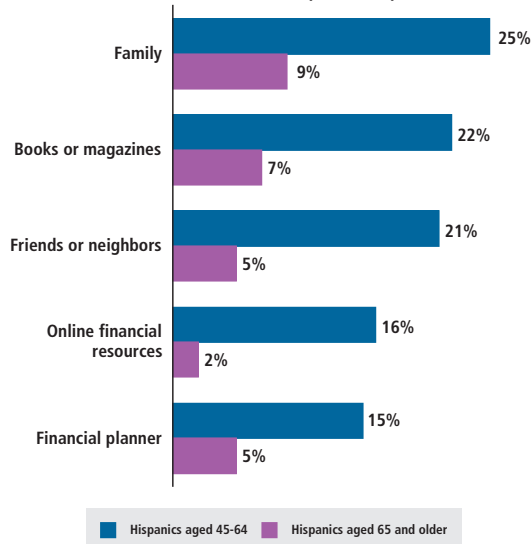
Still, Hispanics are more likely to worry about immediate financial issues — such as paying bills or unexpected medical expenses — than losing a job. They do not worry as much about keeping up with mortgage or credit card payments and the declining value of their stocks or retirement investments, but they are also more likely to say those concerns do not apply to them because they do not have credit cards, a mortgage, or stock or retirement investments.

SOURCE: "Hispanic Poll," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; surveys.ap.org. Price: Call for information.

## Hard Hit Hispanics Are Attempting To Improve Their Situation

More than four in 10 Hispanics aged 45 and older (43%) have had problems paying for essential items — such as food and utilities — in the past year due to the recession, according to AARP. Their health has taken a negative turn:

WHERE HISPANICS HAVE TURNED FOR FINANCIAL ADVICE IN THE PRIOR YEAR, BY AGE, 2010



SOURCE: AARP Viva

Their financial health has also suffered, with 35% stopping their contributions to their 401(k)s, IRAs, or other retirement savings. A third (33%) are carrying a higher balance on their credit cards, and 33% have had problems paying their rent or mortgage. Some 22% have prematurely withdrawn funds from their retirement accounts.

Some older Hispanics are taking a proactive approach to improve their situation. Nearly three in 10 (29%) have taken job training to update their skills or learn new skills, and 26% have looked for a new job. One in seven (14%) attended a career fair, and 12% have taken training to become skilled at an entirely new job. A few (8%) started their own business.

Hispanics aged 45-64 are more likely than those aged 65 and older to have sought financial consultation.

SOURCE: "Recession Takes Toll On Hispanics 45+," AARP, Rebecca Perron, 601 E. Street NW, Washington, DC 20049; 202-434-6324; rperron@aarp.org; www.aarp.org/research. Price: Available online at no charge.

## Blacks And Whites Have Different Investment Plans And Goals

Six in 10 Blacks (60%) invest in the stock market in 2010, either in individual stocks or mutual funds, a proportion that has steadily declined since a high of 74% in 2002, according to Ariel Investments. By comparison, 79% of Whites invest in the stock market, a proportion that has remained relatively steady over the past decade.

In 2008, a greater proportion of Blacks believed that real estate was a better investment opportunity than the stock market (39% vs. 37%). In 2010, however, a greater proportion of Blacks believe that the stock market rather than real estate is the best investment they can make (41% vs. 30%).

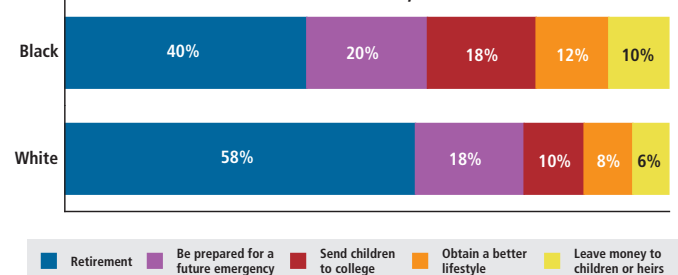
White investors have generally considered the stock market a better investment than real estate; in 2010, 55% say the stock market is the best option, vs. 27% who cite real estate.

While Whites have consistently saved or invested more money than Blacks, the gap has widened dramatically in 2010. Whites save or invest an average of \$367 a month, compared to an average of \$189 a month for Blacks. By comparison, in 2006, Whites invested an average of \$317 a month, compared to an average of \$245 a month for Blacks.

Blacks (27%) and Whites (29%) are most likely to say they would put money into their savings, a money market account, or a CD if they had extra cash to invest. Whites (19%) are nearly twice as likely as Blacks (12%) to say they would put extra money toward a mutual fund, whereas Blacks (10%) are more likely than whites (7%) to invest in individual stocks. In addition, Blacks (11%) are nearly twice as likely as Whites (6%) to invest in a small business belonging to them or someone else.

Nearly half of Blacks (48%) have dipped into their personal savings to make ends meet during the recession, compared to 31% of Whites. Blacks (21%) are twice as likely as Whites (11%) to have increased their credit card debt during that time. However, Whites are more likely than Blacks to have lost money that was part of their retirement plan (63% vs. 45%) and to have lost money outside of their retirement plan (39% vs. 29%).

PRIMARY REASON AMERICANS SAVE OR INVEST MONEY, BLACKS VS. WHITES, 2010



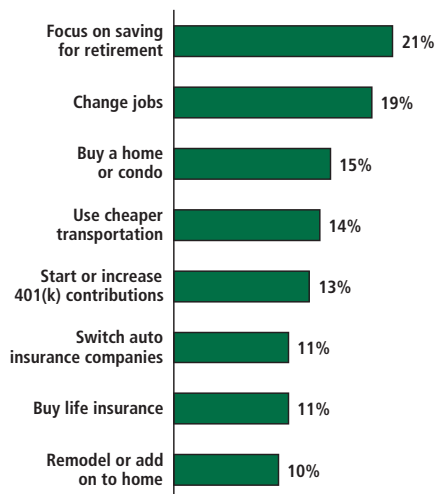
SOURCE: Ariel Investments

SOURCE: "2010 Black Investor Survey," Ariel Investments, Merrilyn Kosier, SVP, 200 E. Randolph Dr., #2900, Chicago, IL 60601; 312-726-0140; www.arielinvestments.com. Price: Available online at no charge.

## Black Households Are Optimistic About Their Financial Futures

Blacks were less likely than the general population to be worried about the U.S. economy in 2009 (27% vs. 32%), according to Nationwide and the Tavis Smiley Group. That may be because Blacks (18%) are more likely than the general population (12%) to say their household's financial situation improved over the prior year, and they are less likely to say it has worsened (38% of Blacks vs. 42% of the general population). In addition, 66% of Blacks are optimistic

**CHANGES TO SPENDING AND SAVING HABITS BLACK HOUSEHOLDS INTEND TO MAKE IN 2010**



SOURCE: Nationwide Insurance and the Tavis Smiley Group

about their household's financial situation improving in the coming year, compared to 39% of the general population.

Black households were as likely — and in many cases more likely — than general population households to make sacrifices during the prior year, such as:

- ▶ Cutting back on eating out and entertainment (62% of Blacks and 62% of the general population);
- ▶ Delaying non-essential purchases (50% vs. 49%);
- ▶ Budgeting less for travel (45% vs. 44%);
- ▶ Reducing spending other than entertainment (45% vs. 43%);
- ▶ Focusing on paying off credit cards and other debts (49% vs. 42%);
- ▶ Taking fewer personal or family vacations (46% vs. 41%);
- ▶ Delaying big-ticket purchases (42% vs. 41%); and
- ▶ Creating a household budget (37% vs. 31%).

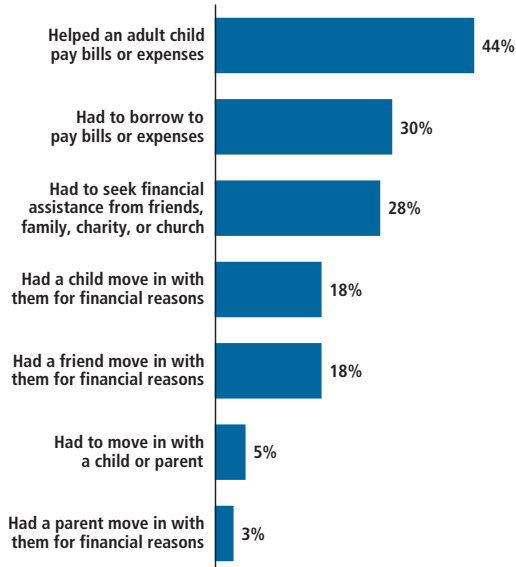
Overall, Black households are more likely than general population households to say these changes in spending and saving are short term changes. Their most important household goals in 2010 include paying rent or mortgage (33%), paying monthly expenses (23%), saving for an emergency (15%), saving for retirement (9%), and saving to buy a home (7%).

SOURCE: "Economic Opinion Poll," Nationwide, Gayle Saunders, One Nationwide Plz., Columbus, OH 43215; 614-203-4772; saundee4@nationwide.com; www.nationwide.com. Price: Available online at no charge.

## Blacks Are Battered By Recession Cutbacks

Negative effects of the recession are more prevalent among Blacks aged 45 and older than the rest of the Ameri-

**FINANCIAL CHANGES BROUGHT ON BY THE RECESSION EXPERIENCED BY BLACKS AGED 45 AND OLDER, 2010**



SOURCE: AARP

can population the same age, according to AARP. Like other races/

ethnicities, Blacks aged 45 and older have cut back on entertainment and travel, but they are significantly more likely to have had difficulty paying for essentials such as electricity, heat, and water (44% of Blacks, vs. 25% of the general population). They are twice as likely to have had difficulties making rent or mortgage payments and also twice as likely to have cut back on medications.

More than a quarter (26%) prematurely withdrew from their 401(k), IRA, or other investments since the recession began, compared to 18% of the general population. They most commonly did so to:

- ▶ Pay living expenses (53%);
- ▶ Pay their mortgage or rent (49%);
- ▶ Pay off debt (44%);
- ▶ Pay healthcare expenses (39%);
- ▶ Support their adult children (32%); and
- ▶ Pay for education expenses (27%).

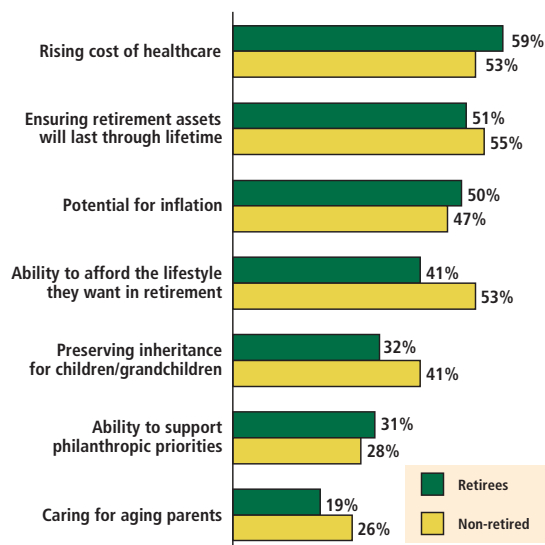
Despite the economic hardships they have faced, only 12% of Blacks aged 45 and older have consulted a financial planner for advice. They are more likely to seek advice from family members (22%), books or magazines (19%), and friends or neighbors (18%). Some 11% sought advice from online financial planning resources.

SOURCE: "African American Experiences In The Economy: Recession Effects More Strongly Felt," AARP, Rebecca Perron, 601 E. Street NW, Washington, DC 20049; 202-434-6324; rperron@aarp.org; www.aarp.org/research. Price: Available online at no charge.

## Affluent Retirees Would Have Prepared For Future Differently

A slight majority of retired affluent Americans (51%) — defined as those with investable assets of at least \$250,000 — would have focused more on their life goals and less on amassing a specific dollar amount for their nest egg if they could go through their working years all over again, according to Bank of America. Nearly a third of retirees (31%) worked with a financial advisor when planning their retirement. Of those, 55% wish they had started working with their advisor sooner than they did.

FINANCIAL CONCERNS ABOUT RETIREMENT, AFFLUENT RETIREES VS. AFFLUENT NON-RETIRED, 2009



NOTE: Affluent Americans are defined as those with at least \$250,000 in investable assets.

SOURCE: Bank of America

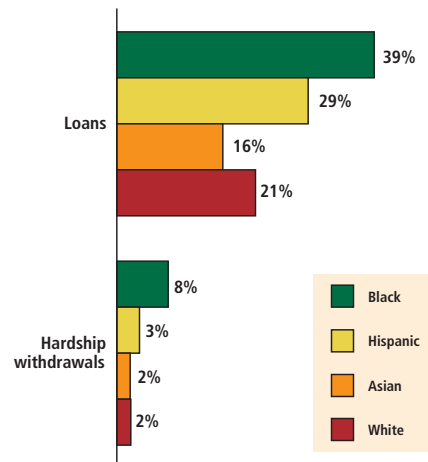
SOURCE: "Affluent Insights Quarterly," Bank of America, Selena Morris, 1 Bryant Park, New York, NY 10036; 212-449-7283; selena.morris@bankofamerica.com; www.bankofamerica.com. Price: Available online at no charge.

## Blacks And Hispanics Lag In Saving Up For Retirement

Blacks (66%) and Hispanics (65%) trail Whites (77%) and Asians (76%) in participation in employer-sponsored 401(k) retirement plans, reports Ariel/Hewitt. In addition, they contribute at a much lower rate: 6.0% for Blacks, 6.3% for Hispanics, 7.9% for Whites, and 9.4% for Asians.

With such disparities, it is not surprising that Blacks and Hispanics have lower average balances in their retirement accounts. In addition, the difference in balance exists at all income levels. Among those with annual incomes of \$30,000 to \$59,999, Blacks have an average balance of \$21,224; Hispanics \$22,071; Asians \$32,590; and Whites \$35,551.

LOANS AND HARDSHIP WITHDRAWALS EMPLOYEES HAVE TAKEN FROM THEIR 401(K) ACCOUNTS, BY RACE, 2009



SOURCE: Ariel/Hewitt Investments

Among those with annual incomes of \$120,000 or more, Hispanics have an average balance of \$150,259; Blacks \$154,902; Asians \$161,259; and Whites \$223,408.

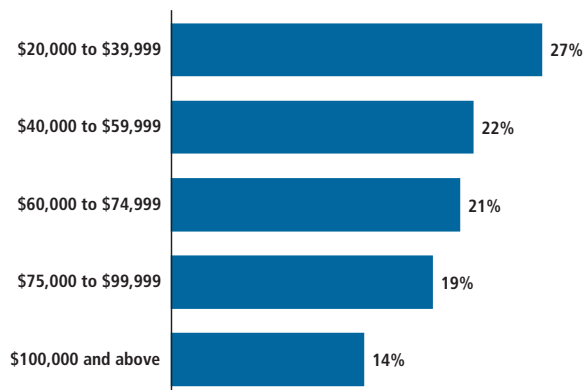
Among the reasons their balances are lower: Hispanics and Blacks are more likely than Whites and Asians to have taken loans and hardship withdrawals from their retirement accounts.

SOURCE: "401(k) Plans In Living Color," Ariel/Hewitt Investments, Merrilllyn Kosier, SVP, 200 E. Randolph Dr., #2900, Chicago, IL 60601; 312-726-0140; www.arielinvestments.com. Price: Available online at no charge.

## Men, Lower Income Americans Most Optimistic About Retirement

A slight majority of Americans nearing retirement age (aged 40-64) are unsure of how much money they will have when they retire, according to Country Financial. Men (46%)

AMERICANS WHO ARE CONFIDENT THEY CAN RETIRE AHEAD OF SCHEDULE, BY INCOME, 2010



SOURCE: Country Financial

are more likely than women (42%) to say they know how much money they will have. Men (43%) are also more likely than women (34%) to say they will retire later than originally planned due to the recession.

Contrary to what one might expect, higher income does not mean greater confidence in retiring on time. In fact, the lower their income, the more likely they are to think they will retire ahead of schedule.

**SOURCE:** "Financial Security Survey," Country Financial, Jay Verner, 1701 N. Towanda Ave., Bloomington, IL 61701; 309-821-3372; jay.verner@countryfinancial.com; www.countryfinancial.com.

## How Women Feel About Money And Effective Ways For The Financial Services Industry To Reach Them

It wasn't so long ago that men handled all of a family's money matters, from being the sole breadwinner to deciding where to open a checking account. Now, women are the ones in charge of the family's financial decisions. Today, 95% of women claim to be the financial decision-makers in their households, and 84% of married women say they are either solely or jointly responsible for household financial decisions, according to Prudential Financial.

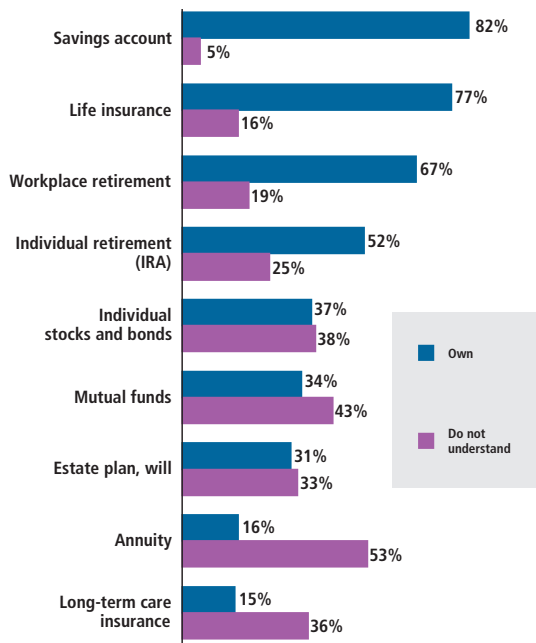
### 57% Of Women Are More Cautious About Money

In light of the economy, both men and women are feeling more anxious about their financial portfolios, but that's about the only emotion shared by both genders. Women are much more pragmatic and less risk averse across all financial planning components, whereas men are much more confident, says JWT's Ann Mack. In fact, the market crisis has led to 57% of women saying they are now even more cautious about money.

A family member or spouse (64%) is the first resource women turn to in making investment product decisions, followed by printed materials (62%), the Internet (42%), provider/employer plan website (42%), co-workers (34%), seminars/meetings (30%), and a financial advisor (29%). That said, 35% feel the most important source of financial education and advice comes from a financial advisor.

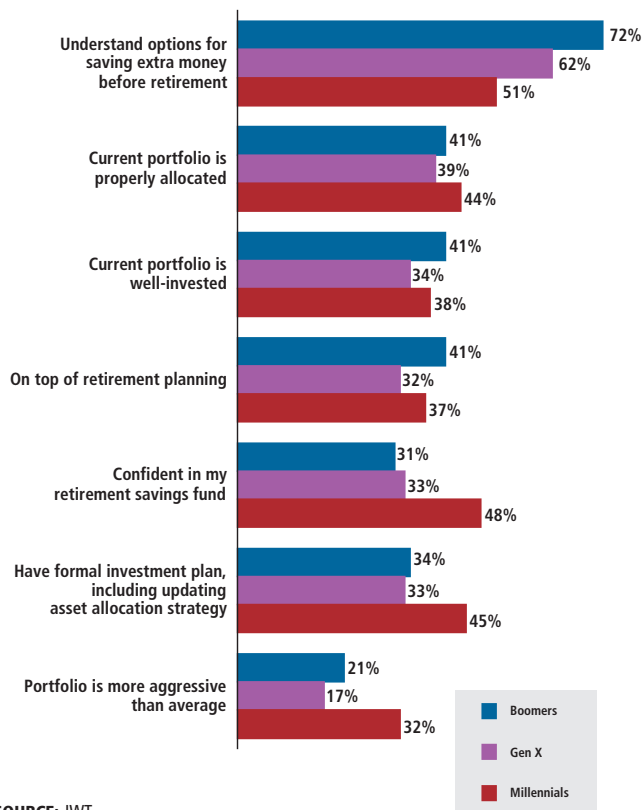
Despite women's increased involvement in handling

WOMEN'S UNDERSTANDING, OWNERSHIP OF FINANCIAL PRODUCTS, 2010



SOURCE: Prudential Financial

CONFIDENCE IN RETIREMENT PLANS & INVESTMENTS, WORKING WOMEN, BY GENERATION, 2010 (PERCENT WHO AGREE WITH THE FOLLOWING STATEMENTS)



SOURCE: JWT

financial matters, many are still intimidated by money talk. Fewer than two in 10 (18%) feel "very prepared" to make financial decisions, according to Prudential. More than four in 10 women (44%) feel financial information is overwhelming, 36% feel it's complicated and hard to understand, and 26% don't understand the terminology, reports the Allianz Life Insurance Company.

A large number of women admit to being baffled by specific concepts: Four in 10 (43%) don't understand what a mutual fund is, 25% don't understand IRAs, and 16% don't understand life insurance, according to the Prudential survey.

### Retirement, Kids' Future Are Key Priorities

Planning for a comfortable retirement and providing for their families' future are women's top priorities, says Prudential. The number of women who feel it's important to pay for their kid's college tuition has nearly doubled from 2004 to 2010 (23% vs. 44%). However, their confidence in their ability to pay for college has dropped from 26% in 2006 to 21% in 2010. While accumulating assets is also a top priority, women are equally focused on protecting their wealth through financial security planning.

Other key areas of financial planning depend on a



woman's life stage. Single women with children, for instance, are most interested in planning for retirement, reports Allianz. Single women and divorced women are particularly interested in financial planning. Working women tend to be most educated about financial planning, as well as more active in investment strategies. Women also become more knowledgeable about long-term care costs and generating retirement income as they age.

JWT's Mack recommends the financial services industry factor in these women-specific issues when crafting messages and programs:

**Channel humility.** Women take more time than men to research before making financial decisions so it's important to help them feel confident. It's best to provide as much data as possible to let women come to the final decision rather than telling them what to do.

**Multi-channel access.** Women live in a multi-platform world so it's critical the financial industry address their needs, whether in person, via mobile, or online.

**Link to real life.** Women are better able to grasp retirement planning when it's based on real life scenarios. For instance, advise women to invest X amount of dollars in order to afford that beach house or to take a vacation. Being too abstract won't work, says Mack. "It needs to be explicit about how she leads her real life."

**Make it simple.** Women prefer simple terms and materials that are clear. While it's important that information does not "talk down to women," it does need to be easily understood and digestible. That said, women are much more likely than men to say they don't understand a concept or to seek advice.

**Money clubs.** Encourage women to openly discuss financial matters with their friends by hosting or facilitating finance clubs. Financial services companies can provide materials or discussion topics, similar to what publishing houses provide for book clubs. It's important to keep the clubs fun and lighthearted.

**SOURCE:** Allianz Life Insurance Company, Sherri DuMond, VP Marketing Solutions, 5701 Golden Hills Dr., Minneapolis, MN 55406; 800-950-5872; sherri\_dumond@allianzlife.com; www.allianzlife.com.

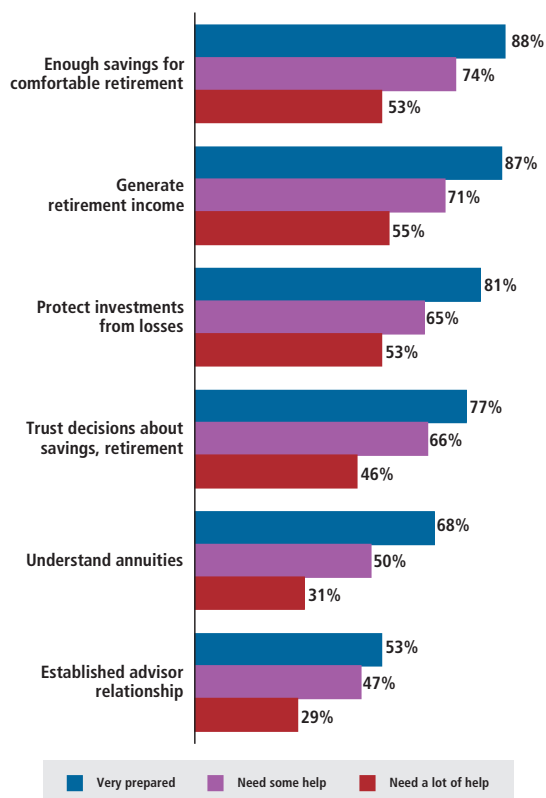
"Financial Experience & Behaviors Among Women," Prudential Financial, Judy Rice, President Investments, 100 Mulberry St., Newark, NJ 07102; 973-802-2991; judy.rice@prudential.com; www.prudential.com.

JWT, Ann Mack, Director of Trendspotting, 466 Lexington Ave., 3rd Fl., New York, NY 10017; 212-210-7378; ann.mack@jwt.com; www.jwt.com.

## Women Confident About Retirement Plans, Unsure About Mutual Funds

Planning for a comfortable retirement and providing for their family's future are women's top priorities, according to Prudential Financial. While accumulating assets is also a top priority, women are equally as focused on protecting their wealth through financial security.

WOMEN'S PREPAREDNESS FOR AND UNDERSTANDING OF THEIR FINANCIAL NEEDS AND SITUATIONS, 2010



SOURCE: Prudential Financial

Despite women's increased involvement in handling financial matters, many are still intimidated by this money talk. Fewer than two in 10 (18%) feel "very prepared" to make financial decisions.

Women are much more confident in feeling they will have enough savings for a comfortable retirement (88%), will be able to make money while retired (87%), and be able to protect investments from losses (81%).

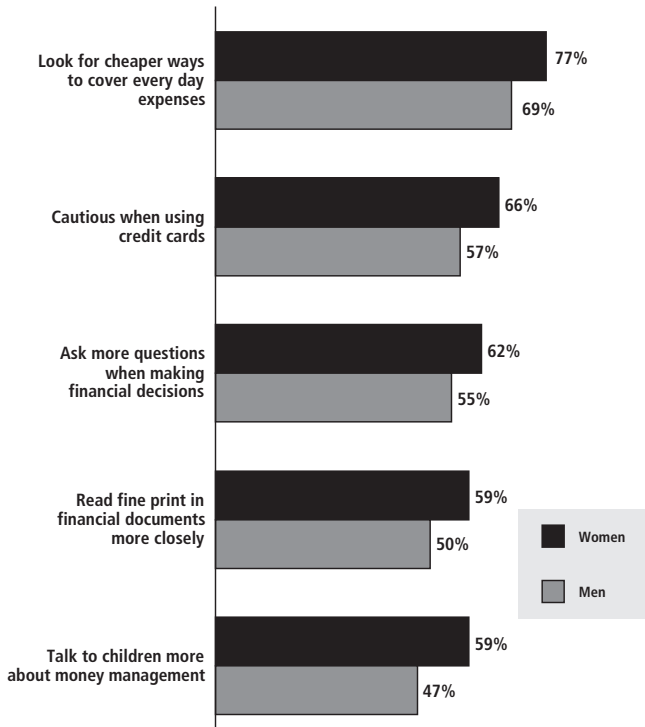
A number of women admit to being baffled by specific concepts: Four in 10 (43%) don't understand what a mutual fund is, 25% don't understand IRAs, and 16% don't understand life insurance.

**SOURCE:** "Financial Experience & Behaviors Among Women," Prudential Financial, Judy Rice, President Investments, 100 Mulberry St., Newark, NJ 07102; 973-802-2991; judy.rice@prudential.com; www.prudential.com.

## Women Are More Active In Financial Matters After Recession

Women are more likely than men to believe there are "silver linings" to the recession (71% vs. 62%) and to make recent, positive changes in their financial behaviors and habits, according to Charles Schwab.

CHANGED BEHAVIORS AS A RESULT OF THE RECESSION,  
MEN VS. WOMEN, 2010



SOURCE: Charles Schwab

Women are also more likely than men to feel their kids' financial success will surpass their own (56% vs. 42%). Men, for their part, fret more than women about outliving their retirement money (26% vs. 19%).

SOURCE: Charles Schwab, Sarah Bulgatz, 211 Main St., San Francisco, CA 94105; 415-667-0328; sarah.bulgatz@schwab.com; www.schwabmoneywise.com

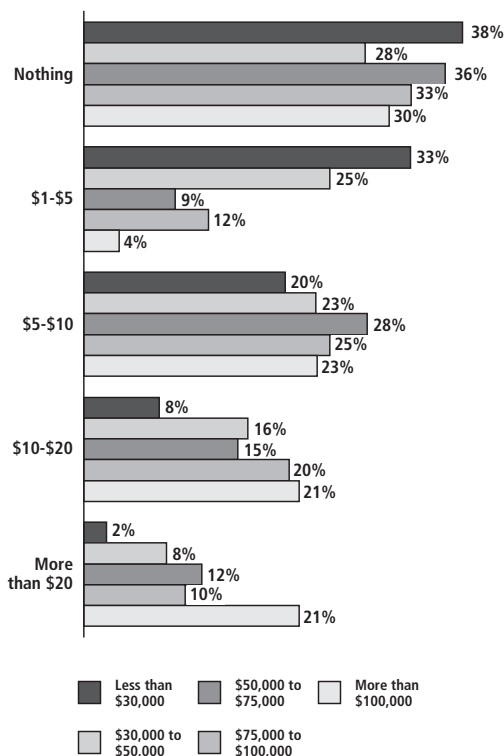
## Likelihood Of Allowance Is Tied To Siblings

A third of children (33%) do not receive a weekly allowance from their parents, according to a YOUTH MARKETS ALERT survey conducted by Invoke Solutions. One in 10 fortunate children (10%) receive \$20 every week.

Interestingly, the more children a family has, the more likely they are to get an allowance. An only child (36%) is the most likely not to receive an allowance at all, followed by 31% of those in two-child families, and 29% of those in three-child families. However, an only child (28%) is more likely to get an allowance over \$10 than those in two-child families (24%) or three-child families (20%).

Although children in less affluent homes tend to receive less spending money, those from affluent homes aren't necessarily given large weekly allowances. Some 21% of kids living in homes with more than \$100,000 annual income receive at least \$20 per week, but another 30% don't receive any money, and 23% receive between \$5-\$10.

HOW MUCH SPENDING MONEY PARENTS GIVE THEIR CHILDREN, BY HOUSEHOLD INCOME, 2009



SOURCE: EPM Communications, Inc.

SOURCES: "Weekly Allowance Survey," EPM Communications, Larissa Faw, Editor, 160 Mercer St., New York, NY 10012; 212-941-1633, x16; lfaw@epmcom.com; www.epmcom.com.

Invoke Solutions, Ankit Chandra, Client Research Team, 375 Totten Pond Rd., #400, Waltham, MA 02451; 781-810-2733; ankit.chandra@invoke.com; www.invoke.com.

## Two in 10 Kids Tell Parents To Be Frugal

Those aged 6-16 are sensitive to the economy. One in five have told their parents "maybe we shouldn't buy that due to the recession," according to American Express. Children from more affluent backgrounds are most likely to be more frugal.

The economy has provided an opportunity for parents to talk to their kids about money. Nine in 10 (91%) plan to offer financial lessons in 2010, with 30% teaching them about debt and its impact on spending, 25% teaching the value of the dollar through reward systems, such as an allowance, and 21% explaining how money is earned and used in everyday life.

SOURCE: American Express, Desiree Fish, 200 Vesey St., New York, NY 10285; 212-640-4761; desiree.c.fish@axep.com; www.americanexpress.com.

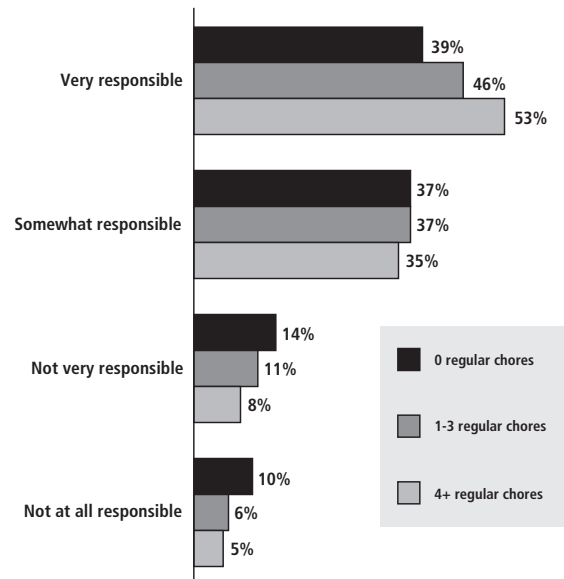
## Chores Correlate With Money Savvy

Children who regularly do chores while growing up are cited by their parents as being financially responsible as young adults, according to Charles Schwab. Those who had no chores growing up are twice as likely to be labeled financially irresponsible as those who had at least four regular chores (10% vs. 5%).

Moms are more likely than dads to believe their kids will be more financially successful than they are (56% vs. 42%). One in three parents (33%) believe their kids will be at least as successful as they are.

Seven in 10 parents (69%) want their children to choose a profession they love, even if it means they will have difficul-

INFLUENCE OF CHORES ON CHILD'S FINANCIAL RESPONSIBILITY, 2010



SOURCE: Charles Schwab

ty paying their bills, while 31% prefer they choose a well-paying career even if they aren't passionate about it.

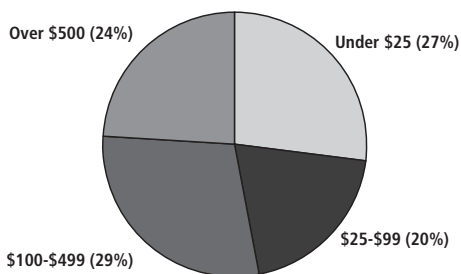
**SOURCE:** "2010 Families & Money Survey," Charles Schwab, Sarah Bulgatz, 211 Main St., San Francisco, CA 94105; 415-667-0328; sarah.bulgatz@schwab.com; www.schwabmoneywise.com.

### Kids, Cash, And Best Age To Start Working

One in four children (24%) have received at least \$500 as a gift, according to *Parenting* magazine. Most gifts are less generous. Nearly half (47%) of parents say their child has never received more than \$100 in cash as a single gift.

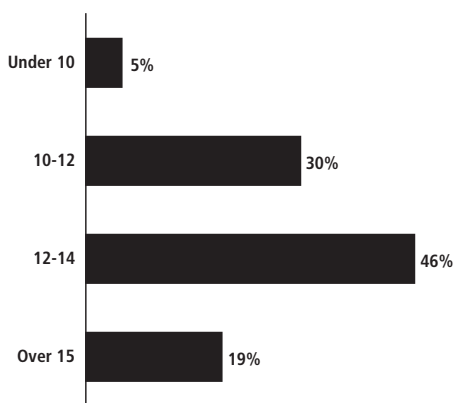
Separately, 35% of parents believe their children need to be 10-12-years-old to start working "odd jobs" around the neighborhood such as mowing lawns or walking dogs. Another 46% see 12-14 as the right age.

**LARGEST SINGLE AMOUNT OF MONEY CHILDREN HAVE RECEIVED AS A GIFT, ACCORDING TO THEIR PARENTS**



**SOURCE:** Parenting.com

**AGE WHEN PARENTS SHOULD LET CHILDREN START WORKING "ODD JOBS" SUCH AS WALKING DOGS OR DOING YARD WORK**



**SOURCE:** Parenting.com

**SOURCE:** The Parenting Group, Nancy Hallberg, Chief Strategy Officer, 2 Park Ave., 10th Fl., New York, NY 10016; nancy.hallberg@bonniercorp.com; www.parenting.com.

### College Students Aren't Cutting Back

More than half of college kids 18-24 (52%) say their spending on dining out has increased or remained steady over the past year, compared to 38% of college students 25-34, according to Alloy Media & Marketing and Harris Interactive. Students 18-24 will have an estimated \$37.7 billion in discretionary funds, with food, automotive and entertainment as the top expenditures.

This group has not cut back on spending, despite a slow economy. Whereas those 25-34 have cut back on entertainment and at nightclubs or bars, 18-24-year-olds have not shown the same restraint. Their spending on personal care and technology also increased.

**SOURCES:** Alloy Media & Marketing, Andy Sawyer, EVP Media Services, asawyer@alloymarketing.com. Also, Jodi Smith, VP Communications 151 W. 26th St., 9th Fl., New York, NY 10001; 212-329-8359; jsmith@alloymarketing.com; www.alloymarketing.com.

Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

# factoids

- More than six in 10 men (62%) like managing their own **investments**, compared to 48% of women; that may be because men are also more likely to feel confident in their investment choices (48% vs. 33%). (*MassMutual*; phone: 413-744-0589)
- More than three quarters of workers (78%) lived **pay-check to paycheck** as of November 2009, up from 61% six months prior, and 17% reduced their contributions to their 401(k)s. (*CareerBuilder*; phone: 773-527-2437)
- More than one in five **bank or credit union customers** who receive their statements by mail (21%) are dissatisfied with their financial institution, compared to only 11% of those who receive electronic statements. (*PayItGreen*; Phone: 703-622-9159)
- Some 44% of Americans carry **credit card** debt; 83% know the interest rate on the card they used most often, and though 93% know they can negotiate a better rate, 65% have not bothered to do so. (*Lending Club*; phone: 866-754-4094)

## REASONS HISPANICS DO NOT HAVE A FINANCIAL SAFETY NET, 2010

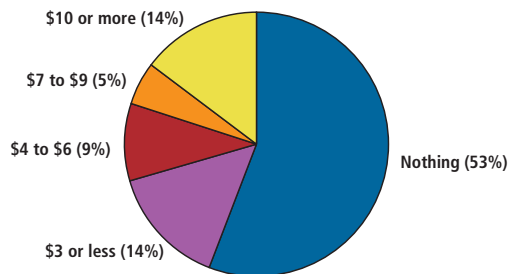
Lack of information .....	47%
Cannot afford it .....	39%
Do not think about financial security .....	30%
Do not think they need it .....	21%
Do not trust others with their financial information .....	20%

SOURCE: New York Life Insurance Company; phone: 212-576-8398.

- One in 10 Americans with an annual household income of \$100,000 or more never visit brick-and-mortar **bank locations**, compared to 4% of those with incomes of \$50,000 to \$75,000. (*Ally Financial*; phone: 313-656-6967)
- Nearly half of parents (49%) allow their children to make all the decisions or the majority of decisions about **how their children spend their money**. (*Money Management International*; phone: 713-394-3202)
- Three quarters of adults (75%) expect to rely on Social Security for at least a portion of their **retirement income**, and 50% are willing to pay more in payroll taxes to ensure the program will continue. (*AARP*; phone: 202-434-2560)
- While 88% of employers offer workers **financial education** related to retirement, only 28% offer basic financial education programs that focus on budgeting, debt reduction, and credit management. (*Personal Finance Employee Education Foundation*; phone: 859-433-0557)
- Most customers of credit unions (57%) trust their **financial institution**, compared to 36% of big bank customers who trust their financial institution, which may explain why 10% of big bank customers switched to a credit union in the prior year. (*Mintel*; phone: 312-628-7946)

- One in seven Hispanics (14%) save their **loose change** to set a good example for their children. (*Coinstar*; phone: 425-943-8121)
- Nearly three quarters of lawyers (73%) say more couples are requesting **prenuptial agreements** than in previous years, and 52% say women are initiating the requests. (*American Academy of Matrimonial Lawyers*; phone: 312-263-6477)
- More than eight in 10 married 40-64 year olds (83%) believe they and their spouses agree on how they will spend their **money in retirement**, though 56% say they have no idea how much money they will have to retire on. (*Country Financial*; phone: 309-821-3372)
- A slight majority of Americans (51%) feel good about their **personal finances**, up from 42% in March 2010; 42% feel good about spending money, up from 36% over the same period. (*RBC*; phone: 212-428-6902)
- More than three quarters of Americans (78%) are **saving for retirement** in 2010, up from 69% in 2009; those aged 55-64 (83%) are more likely than their younger counterparts to save. (*Edward Jones*; phone: 703-254-1300, x106)
- More than 50% of college students were **late paying a bill** during the prior year. (*Higher One*; phone: 866-444-4379)
- Americans pay a record-high average of \$2.33 per use in **ATM fees**, and an additional \$1.41 on average for using an ATM that is out of their bank's network; the average overdraft fee also reached a new record at an average of \$30.47. (*Bankrate*; phone: 917-368-8671)

## MONTHLY AMOUNT AMERICANS PAY FOR BANKING SERVICES, 2010



SOURCE: American Bankers Association; phone: 202-663-5471



# food & beverage

Most people like to cook, and having home-cooked meals is important to them. They are most likely to have a home-cooked breakfast and dinner. They most commonly have lunch away from home, with sandwiches being a popular option.

Americans put about 60% of their food budget toward food at home, and about 40% to food eaten away from home. What they keep to eat at home has changed over the decades — they have fresh veggies instead of canned or frozen, they are more likely to have wheat or multigrain bread instead of white bread, they have fresh fruit and not sodas. One constant is that most always have milk on hand, as they did decades ago.

Diet is a major concern for most Americans as the country's obesity rate rises. They think about what they eat both when they go food shopping and when they cook. They are less conscious of their nutrition habits when eating on the go, and Americans were more likely to eat while traveling in 2010.

When in a hurry, snack foods are a common meal replacement. One positive effect of the recession is that Americans have cut out sweets as they cut spending, helping them establish healthier eating habits.

At the grocery store, Americans still have difficulty identifying the difference between "organic" and "natural." While they prize these healthy options, they often do not buy them because of their higher price.

As in recent years, shoppers are trading down to save money by choosing private label brands over national brands. They are also making choices for convenience, opting for more prepared foods.

Americans are spending less at restaurants than previously as they continue to watch their budgets following the recession. Fast food spots were hardest hit, though young men still make frequent visits.

One bright spot for quick service restaurants is that Americans are more likely than in previous years to go out for breakfast. Americans enjoy dining out and view it as a reward or treat. They like to eat out as opposed to at home because it means no cleaning up after cooking.

## When Eating At Home, Dinner Plans Influence Other Meal Decisions

Breakfast may be the most important meal of the day nutritionally, but for food marketers, it is dinner. Americans choices about dinner — what to eat and where to shop — influence their other home-prepared meal decisions, according to Coca-Cola Retailing Research Council, citing statistics from NPD Group.

### Breakfast

From cereal to baked goods to eggs, more than three quarters of breakfasts (76%) are eaten at home. The average breakfast takes 24 minutes: five minutes to prepare, slightly more than five minutes to cook, and 13 minutes to eat.

Americans are eating breakfast on the go more often than in previous years, and this is true both of breakfasts carried from home and bought at restaurants. Among consumers' greatest concerns is a healthy breakfast (their concerns about healthy foods decline as the day goes on). "Better-for-you" products — such as hot cereals and yogurt — account for 50% of breakfasts and 27% of mid-morning snacks, and they are the fastest growing category.

### Lunch

Americans eat lunch away from home most often, and their interest in finding healthy lunch options is growing. The average lunch takes 44 minutes: seven minutes to prepare, nine minutes to cook, and 28 minutes to eat.

Consumers want to cut down on the hassle and mess of making lunch at home, and many are turning to pre-made sandwiches. In fact, sales of frozen and ready-to-eat sandwiches have quadrupled in the past 25 years. Ham continues to be the most popular sandwich ingredient, but their choice of bread, cheese, and condiments change more frequently.

### Dinner

The largest meal Americans eat is dinner, and it drives their choices of where to shop for all other meals as well. The average dinner takes 60 minutes: 11 minutes to prepare, 16 minutes to cook, 23 minutes to eat, and 11 minutes to clean up afterward.

They most commonly want a dinner that tastes good (45%), followed closely by one that is easy to get or prepare (42%) and will fill them up (40%). They also want something that requires little planning or thought (34%) and makes clean up quick and easy (32%).

Only 24% of consumers plan a complete meal before going shopping. Rather, most (57%) decide what to eat for dinner an hour before they want to eat.

The most common reason they cited for making a home cooked meal instead of eating out is the cost savings (59%). They also believe home cooked meals are better for them (34%) and that it is important to eat as a family (29%). Fewer than three in 10 (29%) choose to make meals at home because they like to cook.

**SOURCES:** "Eating In," Coca-Cola Retailing Research Council; www.crrc.org. Price: Available online at no charge.

NPD Group, Harry Balzer, VP, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-0700; harry\_balzer@npdgroup.com; www.npdgroup.com.

## Home Cooking Is Important To Most Families

The vast majority of households (84%) cooks or prepares a meal at home at least once a week, according to Masterbuilt, which makes cooking equipment. While only 54% of people identify themselves as cooking enthusiasts, 92% are experimenting with new recipes or trying new types of food. When they need help, 39% ask their mothers for cooking advice.

Additional findings include:

- ▶ 86% of households say cooking at home is more important than it was in the prior year;
- ▶ 81% say family dinners are more important; and
- ▶ 31% say eating out at a restaurant is more important.

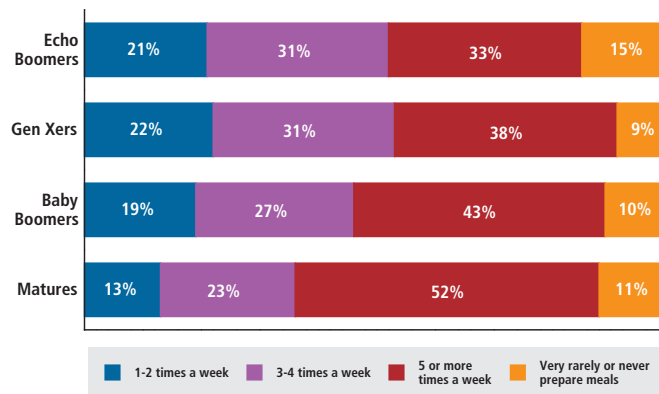
**SOURCE:** "Cooking Habits Survey," Masterbuilt, Don McLemore, VP, 1 Masterbuilt Ct., Columbus, GA 31907; 706-327-5622; dmclmore@masterbuilt.com; www.masterbuilt.com.

## Matures Are At Home In The Kitchen

Nearly eight in 10 Americans (79%) enjoy cooking, but only 30% are truly passionate about it according to Harris Interactive. Only 7% do not cook, and only 14% do not enjoy it at all.

Matures (33%), aged 65 and older, are more likely to be passionate cooks than are Baby Boomers (28%), aged 46-64. The researchers suggest this may be because Matures have more free time than Boomers to spend in the kitchen. Matures also have more practice cooking than other generations: 51% of Matures cook at home five times a week or more, compared to 43% of Boomers, 38% of Gen Xers (aged

FREQUENCY WITH WHICH AMERICANS PREPARE MEALS AT HOME, BY GENERATION, 2010



**SOURCE:** Harris Interactive



34-45), and 33% of Echo Boomers (aged 18-33).

Men (32%) are more likely than women (28%) to love cooking, probably because the daily chore of cooking dinner is less likely to fall on them. Women are more likely than men to occasionally try new recipes and techniques (75% vs. 61%) and look for inspiration in food-related articles, cooking shows, and websites (65% vs. 55%).

Among the general population, those who cook at home (81%) very often cook what they are familiar with. Only 22% frequently look for new recipes to try new foods and preparation techniques, while 46% do so occasionally. One in five (20%) very often seek inspiration from food-related articles, cooking shows, and websites, though do not follow the recipes exactly. A third (34%) frequently use time-saving ingredients or appliances, such as pre-prepped and/or frozen ingredients, toaster ovens, and microwave ovens.

**SOURCE:** "Harris Poll: Cooking," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

## Grocery Spending Tops Dining Out, But Single, Childless Men Indulge

Americans spend an average of \$669 per month on food and drink, according to Bundle. The larger share (58%) is spent on groceries and 42% on dining out.

Not surprisingly, married couples with children spend the most of any household on food and drink in a month (\$826, on average), with 58% of that going toward groceries as opposed to dining out. Married couples without children spend less (\$706 per month), though nearly the same proportion (59%) goes toward groceries. Single people with children also put 58% of their monthly food and drink budget of \$565 toward groceries. Single men without children allocate the smallest proportion of their food and drink spending for groceries (53% of \$568), while single women without children spend the largest proportion on groceries (62% of \$456).

The older the person, the greater the proportion of his or her food and drink budget is allocated for groceries rather than dining out.

**HOW MUCH AMERICANS SPEND ON FOOD & DRINK IN A TYPICAL MONTH, GROCERIES VS. DINING OUT, 2009**

	GROCERIES	DINING OUT	TOTAL	PROPORTION SPENT ON GROCERIES
18-25	\$278	\$242	\$520	53%
26-35	\$336	\$275	\$611	55%
36-49	\$444	\$325	\$769	58%
50-65	\$410	\$307	\$717	57%
65 and older	\$337	\$198	\$535	63%

**SOURCE:** Bundle

**SOURCE:** "How America Spends," Bundle, Jaidev Shergill, Founder, 149 5th Ave., 4th Fl., New York, NY 10010; jaidev@bundle.com; www.bundle.com. Price: Available online at no charge.

## What's In Americans' Pantries: Then And Now

Three quarters of Americans buy organic and natural foods in 2010, up from 73% in 2009, according to Whole Foods Market. Further, organic and natural foods make up 27% of Americans' grocery shopping purchases, up from 20% in 2009.

The vast majority of Baby Boomers (84%) are more concerned with the foods they eat than they have been in the past, and 83% have a greater understanding of how their food is produced. America's pantries and refrigerators have also had an overhaul. According to Boomers — who ran households in 1980 and still do so in 2010 — the most common items they always have on hand in 2010 are:

- ▶ Fresh fruit (83%);
- ▶ Milk (82%);
- ▶ Fresh vegetables (79%);
- ▶ Wheat or whole-grain bread (77%); and
- ▶ Canned or frozen vegetables (69%).

In 1980, the most common items they always had on hand were:

- ▶ Milk (89%);
- ▶ Canned or frozen vegetables (83%);
- ▶ White bread (74%);
- ▶ Soda/pop (74%); and
- ▶ Iceberg lettuce (66%).

Americans are significantly more likely to buy spring or mixed lettuces (59% do so in 2010 vs. 14% in 1980), wheat or whole-grain bread (77% vs. 34%), and whole grain cereals (66% vs. 26%). They are significantly less likely to buy white bread (74% vs. 31%).

**SOURCE:** "Food Shopping Trends Tracker," Whole Foods Market, Robin Rehfield, 125 Cambridge Park Dr., Cambridge, MA 02140; 617-492-5500, x3139; robin.rehfield@wholefoods.com; www.wholefoods.com.

## Time To Tailgate: Grillers Bring Tools To Parking Lot Parties

One in eight adults (12.5%) have tailgated in the prior year, attending an average of 3.4 tailgate parties, according to Weber-Stephen. Those aged 25-34 are most likely to tailgate (19%), followed by 18-24 year olds (17%), and 35-44 year olds (16%).

Half of tailgaters (50%) consider themselves gourmet grillers, 22% are between gourmet and basic, and 28% are basic grillers.

Two thirds of tailgaters (66%) have bought a grill specifically for their tailgate parties, up from 46% in 2005. Most have a set of tongs (90%), a spatula (77%), and a grill brush (70%) in their tool chest. Gourmet grillers are more likely than basic grillers to have skewers (62% vs. 40%), wood chips (49% vs. 30%), and a meat thermometer (45% vs. 29%).

Basic tailgaters spend an average of \$441 per year on food for their parking lot parties, compared to gourmet grillers

who spend an average of \$1,001. Gourmet grillers are most likely to cook chicken (43%), ribs (39%), bratwurst (37%), and steak (33%), while basic grillers favor hamburgers (70%), bratwurst (45%), chicken (42%), and hot dogs (42%).

Basic grillers are more likely than gourmet grillers to want to improve their skills cooking meat (60% vs. 56%), whereas gourmet grillers are more likely than basic grillers to want to improve their skills cooking fish and seafood (51% vs. 41%).

**SOURCE:** "Tailgating Study," Weber-Stephen, Sherry Bale, 200 East Daniels Rd., Palatine, IL 60067; 224-836-2724, sbale@weberstephen.com; www.weberstephen.com. Price: Available online at no charge.

## Americans Are Fond Of Sweets, But Shrinking Budgets Sour Sales

Americans who shop for candy, confections, and gum most commonly eat sweets to give themselves a quick pick-me-up (42%), according to IRI. Nearly four in 10 (42%) crave sweets when they are stressed, and 37% say sweets are their preferred snack when on the go.

Most often, shoppers (60%) buy candy and confections to keep them on hand for snacking. A third (33%) buy them on impulse, and 29% when they have a craving. About one in seven (14%) buy them when a family member requests them during a shopping trip.

Eight in 10 shoppers (80%) choose their brand of sweets based on previous usage and trust of the brand, while 57% make their selection based on price. Some 40% choose a brand because they have a coupon for it, and 36% make their choice based on the product ingredients.

Many shoppers are trying to cut back spending on

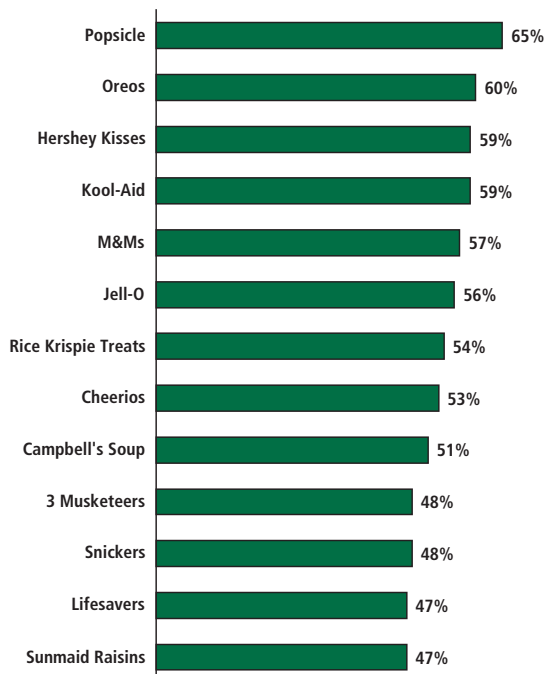
sweets. Nearly half (48%) are doing so in an effort to curb impulse purchases; in fact, 35% say when making cutbacks in their budget, candy is the first to go. More than two in 10 (22%) are making an effort to keep candy out of their homes for dietary reasons.

**SOURCE:** "Confections Survey 2010," IRI, Thom Blischok, President Consulting & Innovation, 150 North Clinton St., Chicago, IL 60661; 312-474-2325; thom.blischok@infores.com; www.symphonyiri.com. Price: Call for information.

## Sweet Treats Bring Out The Kid In You

Sugary treats most remind Americans of childhood, according to TNS Landis. Popsicles top the list, with 65% of those who are aware of the brand saying it reminds them of their youth.

FOODS & BEVERAGES THAT BRING BACK CHILDHOOD MEMORIES, 2009

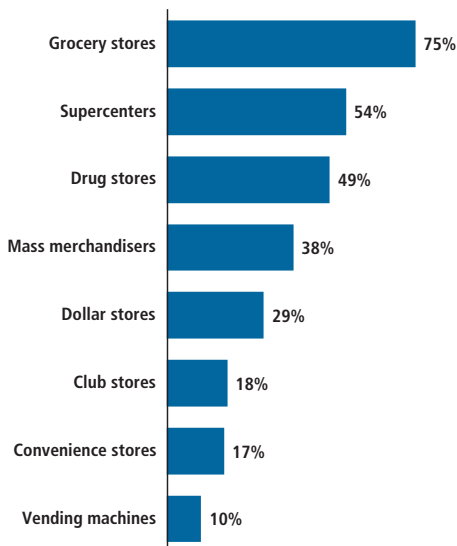


NOTE: Of those who are aware of the brand.

**SOURCE:** TNS Landis

**SOURCE:** "Brings Back Childhood Memories," TNS Landis, Paulette Kish, 4800 Riverside Dr., #200, Palm Beach Gardens, FL 33410; 561-630-9500; pkish@tns-landis.com; www.tns-landis.com.

WHERE CONFECTION SHOPPERS MAKE THEIR SWEETS PURCHASES, 2010



**SOURCE:** IRI

## More Are Drinking Alcohol; Home Sales Holding Steady, Restaurant Sales Suffering During Recession

Two thirds of adults (67%) report consuming alcoholic beverages in 2010, a 25-year high, according to Gallup Poll. The most common indicators of whether a person drinks are church attendance and religious affiliation. Catholics, non-Christians, and those with no religious affiliation are more likely to drink, while those who frequently attend church and Protestants are more likely than average to abstain.

The popularity of beer has waned in the new millennium; 41% name it as their preferred alcoholic beverage in 2010, down from 47% in 1994. Meanwhile, 32% name wine as their preferred drink, up from 29% over the same period. Liquor is favored by 21%, up from 18%.

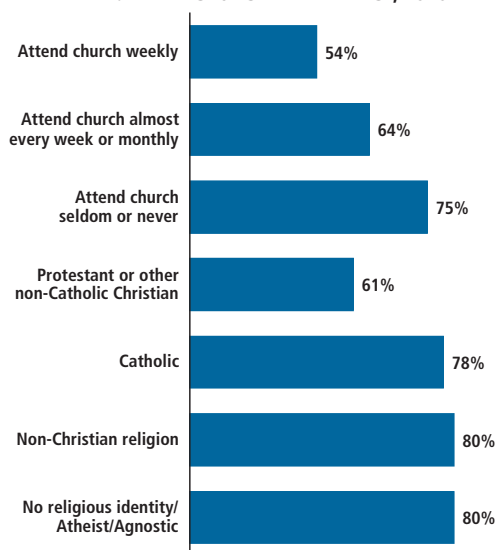
Beer remains the drink of choice for men (54%), while women prefer wine (48%). Nearly equal portions of men and women (22% and 21%, respectively) prefer liquor.

As they age, however, men and women's tastes change. Women aged 18-49 are only slightly more likely to prefer wine (39%) to beer (35%), but women aged 50 and older significantly prefer wine (58%) to beer (18%). Men's preference for beer also diminishes with age: 58% of those aged 18-49 prefer beer, compared to 47% of those aged 50 and older. Only one in seven younger men (14%) prefer wine, but 21% of those aged 50 and older cite wine as their favorite alcoholic beverage.

### Alcohol And The Recession

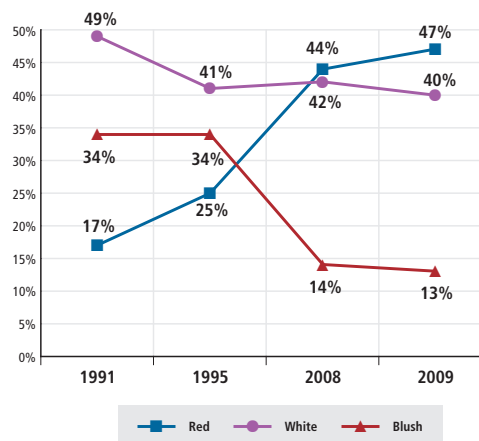
Six in 10 adults (60%) are visiting fine dining establishments less often than they did prior to the recession, 58% are making fewer trips to casual restaurants, and 47% are hanging out at bars and night clubs less frequently, according to Nielsen.

AMERICANS WHO DRINK ALCOHOL, BY RELIGIOUS AFFILIATION AND CHURCH ATTENDANCE, 2010



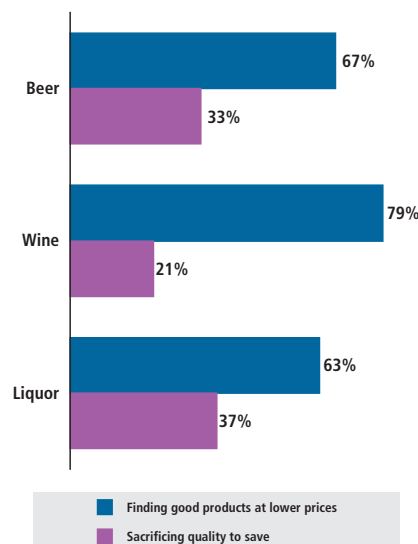
SOURCE: Gallup Poll

SHARE OF VOLUME SALES OF TABLE WINE, BY COLOR, 1991-2009



SOURCE: Wine Institute

ATTITUDES OF CONSUMERS WHO HAVE "TRADED DOWN" WHEN PURCHASING ALCOHOL, BEER VS. WINE VS. LIQUOR, 2010



SOURCE: Nielsen Company

Those aged 55 and older expect to keep their "going out" occasions to a minimum when the economy recovers, but young adults say they will go out much more often when economic conditions improve.

On the bright side, the vast majority of consumers (75%) continue to buy the same brand of alcohol to drink at home. However, 25% of that group are buying less often. One in five (20%) tried less expensive products but were not satisfied with the quality or experience. Some 13% buy the same products, but wait until they go on sale.

Consumers were most likely to "trade-down" when purchasing wine, buying less expensive bottles (23%). Nearly one in five liquor shoppers (18%) did the same, as did 16% of beer

shoppers. Most of those who have bought less expensive products — particularly wine shoppers — feel the selections they have discovered at lower price points are of good quality, while the rest are willing to sacrifice quality to save. Most plan to continue to purchase the lower priced products after the recession lifts, including 75% of wine shoppers, 70% of beer shoppers, and 66% of liquor shoppers.

U.S. wineries experienced evidence of trading down in 2009, according to the Wine Institute. Retail sales were off 4%, down to \$28.7 billion; however, volume was up 2% to 322.8 million cases, revealing that shoppers were buying more wine at lower prices. Wineries that rely heavily on restaurant distribution reported that sales were off between 6% and 9%.

Red wine has steadily increased in popularity over the prior 15 years, stealing market share primarily from blush wines.

The beer industry is also experiencing a decline during the recession, with national shipments down 3.3% in the first half of 2010 on the heels of 1% declines in each of the prior two years, according to the Beer Institute. Much of the slip in sales is due to the fact that younger Americans, who are the heaviest beer drinkers, are experiencing high unemployment rates.

However, 6% of Americans remain heavy beer drinkers, defined as those who drink beer on at least six occasions in a two week period, according to The Media Audit. The cities with the densest populations of heavy beer drinkers are:

- ▶ Reno, NV (10.2%);
- ▶ Fort Myers-Naples, FL (9.7%);
- ▶ Akron, OH (9.4%);
- ▶ Ocala, FL (9.3%); and
- ▶ Eugene, OR (8.5%).

**SOURCES:** "U.S. Drinking Rate Edges Up Slightly to 25-Year High," Gallup Poll, Frank Newport, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.galluppoll.com. Price: Available online at no charge.

"Beverage Alcohol Consumer Survey," Nielsen Company, Danny Brager, VP Beverage Alcohol, 700 Broadway, New York, NY 10003; 949-716-0224; danny.brager@nielsen.com; www.nielsen.com. Price: Call for information.

"Wine Consumption In The U.S.," Wine Institute, 425 Market St., #1000, San Francisco, CA 94105; 415-512-0151; www.wineinstitute.org. Price: Available online at no charge.

"2010 Statistical Update," Beer Institute, 122 C St. NW, #350, Washington, DC 20001; 202-737-2337; info@beerinstitute.org; www.beerinstitute.org. Price: Available online at no charge.

"Top Beer Consuming Markets Revealed" The Media Audit, Robert Jordan, President, 10333 Richmond Ave., #200, Houston, TX 77042; 800-324-9921; rjordan@themediiaudit.com; www.themediiaudit.com. Price: Call for information.

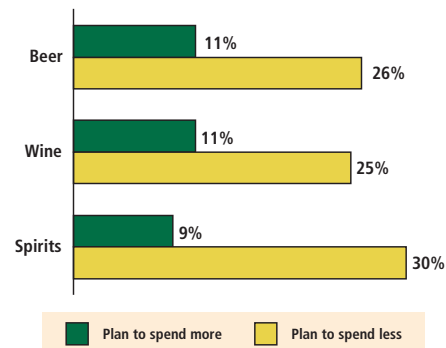
## Drink Up? Shoppers Cutting Back On Beverage Spending In 2010

Sales of non-alcoholic beverages declined 2% in 2009, and a significant proportion of consumers plan to spend less on non-alcoholic beverages in the coming year. Only the juice and coffee categories have a net proportion of consumers (15% and 3%, respectively) planning to spend more in 2010.

Sales of alcoholic beverages were up 8% in 2009, but more

than twice as many consumers plan to spend less on each category of alcoholic beverages in the coming year.

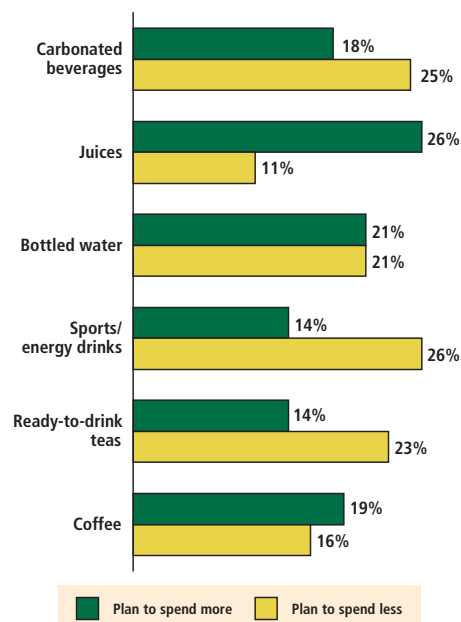
CONSUMERS' INTENDED SPENDING ON ALCOHOLIC BEVERAGES IN 2010, MORE VS. LESS



NOTE: Remainder plan to spend the same amount as in 2009.

SOURCE: Alix Partners

CONSUMERS' INTENDED SPENDING ON NON-ALCOHOLIC BEVERAGES IN 2010, MORE VS. LESS



NOTE: Remainder plan to spend the same amount as in 2009.

SOURCE: Alix Partners

**SOURCE:** "Beverage Industry Review," Alix Partners, David Garfield, Managing Director Consumer Products, 300 N. LaSalle St., #1900, Chicago, IL 60654; 312-346-2500; dgarfield@alixpartners.com; www.alixpartners.com. Price: Call for information.

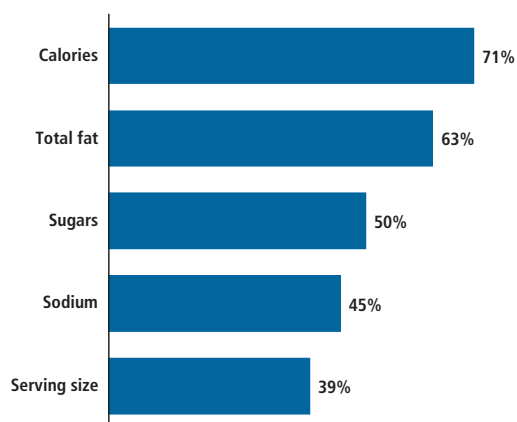
## Nutrition Matters, In Store And On The Plate

Two thirds of Americans (65%) are more concerned about the food they eat than they were five years prior, down from 75% in 2008, according to Deloitte. Their top concerns include:

- ▶ Healthiness (49%);
- ▶ Safety (36%);
- ▶ Over-processed food (31%);
- ▶ Use of chemical ingredients that may be detrimental to long-term health (29%); and
- ▶ Use of high fructose corn syrup (27%).

Nearly six in 10 (59%) feel they have enough information about the food they eat. A slight majority (53%) frequently read the list of ingredients on an unfamiliar packaged food item, though 55% admit they do not understand half of the ingredients in the food they buy.

NUTRITION LABEL INFORMATION CONSUMERS MOST COMMONLY READ, 2010



SOURCE: Deloitte

SOURCE: "2010 Consumer Food Safety Survey," Deloitte, Pat Conroy, Vice Chairman and Consumer Products Practice Leader, 127 Public Sq., Cleveland, OH 44114; 216-830-6602; pconroy@deloitte.com; www.deloitte.com.

## Mom's Take On Sugar Sweeteners

While nearly all moms are aware of sugar sweeteners such as Splenda (98%), they have the most positive impressions about natural sugars such as honey, brown sugar, and sugar in the raw, according to PureCircle, a company that manufactures sugar sweetener Stevia, and marketing agency LaunchForce, a unit of the Wonder Group.

Although most sugar sweeteners contain zero calories, moms are most interested in reducing sugar consumption for both themselves and their children. Also, while it's important that the product is "natural," it doesn't mean it has to be all natural, but rather that it comes from nature, says PureCircle's Jason Hecker.

Some 85% of moms are concerned about their child's sugar intake and they are also worried about the safety of the sugar alternatives, such as Splenda, saccharin, and aspartame. In fact mom is significantly more cautious about the products her child consumes than she is about her own consumption of these same products.

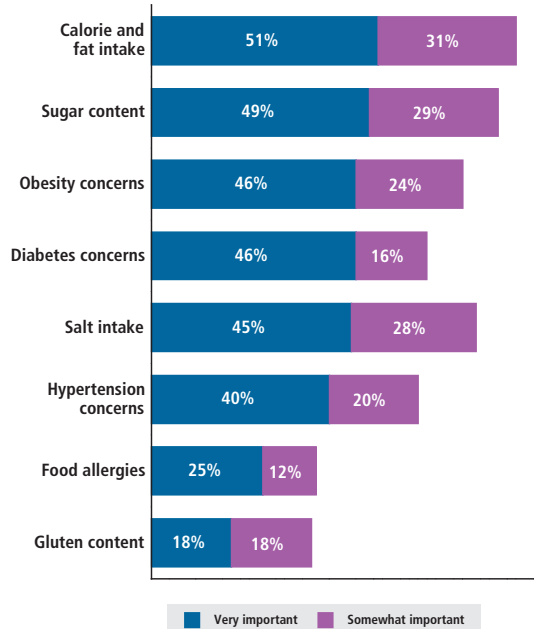
SOURCES: LaunchForce, Tim Coffey, CEO, 312 Plum St., #100, Cincinnati, OH 45202; 513-357-2950; tcoffey@wondergroup.com; www.wondergroup.com.

PureCircle, Jason Hecker, Director of Marketing, 915 Harger Rd., #250, Oak Brook, IL 60523; 630-361-0374; consumerinsights@purecircle.com; www.purecircle.com.

## Shoppers' Health Concerns Are Top Of Mind When Food Shopping

The majority of shoppers say that health issues are very important in influencing the foods they buy, according to the Private Label Manufacturers Association. Seven in 10 shoppers (70%) say supermarkets are providing more information than in the past about the nutrition and healthfulness of the products they sell via signage, demonstrations, and printed materials.

HEALTH CONCERNS THAT AFFECT FOOD SHOPPERS' CHOICES IN-STORE, 2010



SOURCE: Private Label Manufacturers Association

SOURCE: "Store Brands & The Economy: Are Shoppers Ready To Start Spending Again?," Private Label Manufacturers Association, Tom Prendergast, Director of Research Services, 630 3rd Ave., 4th Fl., New York, NY 10017; 212-972-3131; info@plma.com; www.plma.org. Price: Call for information.

## Weighty Issues: Americans' Tactics To Lose Lbs.

Americans (12%) are more likely than those in other countries to weigh themselves daily (5% global average), says Synovate.

When they want to lose weight, 57% of Americans cut back on their food/calorie intake, compared to a global average of 40%. More than half (53%) step up their physical activity, compared to a global average of 35%. Americans (26%) are more than twice as likely as the rest of the world (12%) to order smaller meals at restaurants.

Fast food is a key culprit in Americans' battle with obesity. Nearly half (49%) like fast food too much to give it up, compared to a global average of 29%. Some 47% like to eat junk food when they are feeling down, a habit of only 26% of citizens of other countries.

**SOURCE:** "In:fact Obesity," Synovate, Jennifer Chhatlani, VP Marketing & Communications, 222 S. Riverside Plaza, Chicago, IL 60606; 312-526-4359; jennifer.chhatlani@synovate.com; www.synovate.com.

## Chew On This: Snack Habits Are Changing

More than half of Americans have a snack at least once a day, but 76% have made changes to their snacking habits in the prior two years, according to Technomic. More than a third (35%) are selecting healthier snack options than they did two years prior, 21% are snacking more frequently than they used to, and 19% have broadened their definition of snacks to include more types of food.

Additional findings include:

- ▶ 74% of snacks are eaten at home, though 18-24 year olds (32%) are more likely than average (26%) to eat snacks away from home.
- ▶ 42% of Americans usually skip one meal a day and replace it with snacks.
- ▶ 83% of snacks are bought at food retailers as opposed to restaurants (17%).

**SOURCE:** "Snacking Occasion Consumer Trend Report," Technomic, Darren Tristano, EVP Information Services, 300 S. Riverside Plz., #1940, Chicago, IL 60606; 312-506-3852; dtristano@technomic.com; www.technomic.com. Price: Call for information.

## Sweets And Swim Suits Don't Mix

Three in 10 Americans (30%) associate summer with sweet treats, such as ice cream, popsicles, and frozen yogurt, finds the Corn Refiners Association. More than a quarter (28%) would not want to choose between looking good in a bathing suit and having their sweets. Of those willing to make a choice, more would opt for a less revealing suit (40%) than cutting back on treats (35%). About 20% of Americans say they fail when it comes to resisting sweets.

**SOURCE:** "Summer Sweets," Corn Refiners Association, David Knowles, 1701 Pennsylvania Ave. NW, #950, Washington, DC 20006; 202-331-1634; www.sweetsurprise.com.

## Despite Recession, Some Consumers Continue To Spend At Restaurants

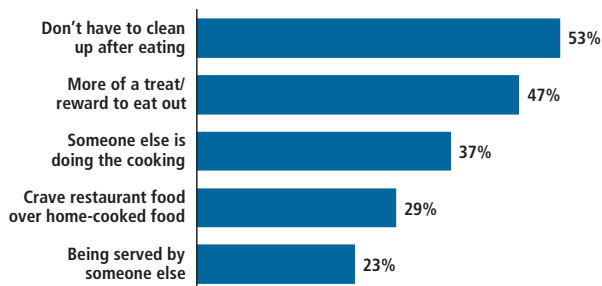
The post recession restaurant consumer is continuing to spend less in 2010, according to research from a wide variety of sources cited by Richard K. Miller Associates in “The 2010 Restaurant, Food & Beverage Market Research Handbook” available from RESEARCH ALERT parent EPM Communications.

The consumers that spend the most at restaurants are those aged 35-54. They spend 17% to 21% more than average because they have the highest incomes and the largest households, according to analysis of Bureau of Labor Statistic data.

Older consumers are also more likely than their younger counterparts to choose full-service over quick-service restaurants, which inflates their spending at restaurants. Consumers under age 25 spend 57% of their dining out budget at fast food restaurants. Fast food dining declines as a share of restaurant spending as age increases and falls below full-service dining share in the 45-54 age group.

Households with children spend the greatest share of their restaurant dollars at fast food restaurants (61%). By comparison, married households without children spend only 33% of their restaurant dollars at fast food restaurants.

### REASONS AMERICANS CHOOSE TO DINE OUT INSTEAD OF EATING AT HOME, 2010



SOURCE: NPD Group as cited by Richard K. Miller Associates

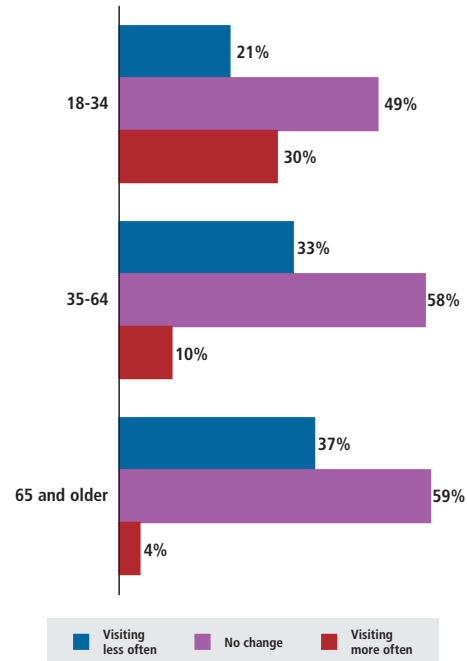
SOURCE: “The 2010 Restaurant, Food & Beverage Market Research Handbook,” Richard K. Miller Associates, available from EPM Communications, 19 W. 21st St., #303, New York, NY 10010; 212-941-0099; info@epmcom.com; www.epmcom.com. Price: \$335 for subscribers to any EPM newsletter, \$385 for non-subscribers.

## As Most Americans Cut Back On Dining Out, Young Men Still Do So

Americans are twice as likely to say they are visiting casual dining restaurants less often (30%) as more often (15%) in 2010 as compared to 2009, according to Sandelman & Associates. The remaining 55% say the frequency of their visits has not changed.

While men and women (15% each) are equally likely to

### AMERICANS' VISITS TO CASUAL DINING RESTAURANTS, BY AGE, 2010 VS. 2009



SOURCE: Sandelman & Associates

say they are visiting more often than a year ago, women (33%) are more likely than men (26%) to say they are visiting less often. Age also plays a significant role: the older the consumer, the more likely they are to say they are cutting back on casual dining visits.

Those two factors combine to make men aged 18-34 the “sweet spot” for casual dining restaurants; 31% of this group is increasing its visits, compared to 21% that are visiting less often than a year ago. The proportion that is increasing its visits to casual restaurants outpaces “heavy casual dining users” — defined as those who eat at such restaurants 12 or more times in the prior three months — 29% of whom are visiting more often. However, men aged 18-34 are more likely than heavy users (15%) to say they are cutting back.

SOURCE: “Where Are Casual Diners Eating When Not At Casual Dining,” Sandelman & Associates, Paul Clarke, Director Marketing, 25790 W. Apache Ln., Barrington, IL 60010; 847-277-7603; paul@sandelman.com; www.sandelman.com. Price: \$500.

## At Restaurants, The Food Has To Be Good, But Service Counts, Too

Consumers are nearly twice as likely to say that good service and a pleasant environment are part of the value equation at full service restaurants as they are to say that value means lots of food for a low price (85% vs. 44%), reports Technomic.

Numerous factors contribute to consumers' evaluation of

good service and pleasant environment. Before the meal, these include:

- ▶ Timely seating (93%);
- ▶ Staff having good knowledge of food and restaurant concept (91%);
- ▶ Prompt greeting from server (90%);
- ▶ Warm and inviting host/hostess (88%); and
- ▶ Prompt greeting upon arrival at the restaurant (84%).

During the meal, diners focus on:

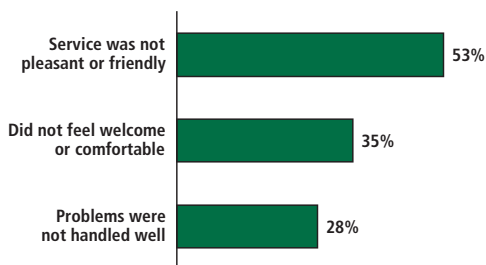
- ▶ Pleasant and friendly service (94%);
- ▶ Correct timing between courses (87%);
- ▶ Server being respectful of conversations at the table (81%); and
- ▶ Server checking to make sure diners are satisfied with their meals (80%).

In evaluating the overall experience, diners' top considerations include:

- ▶ Feeling welcome, comfortable (93%);
- ▶ Any problems being resolved quickly and quietly (93%);
- ▶ Staff being responsive to specific requests (91%);
- ▶ Check/payment process being handled in a timely manner (89%).

Most restaurant-goers would not return to an establishment that did not provide good service.

**SERVICE ISSUES THAT WOULD DRIVE CUSTOMERS AWAY FROM FULL SERVICE RESTAURANTS, 2009**



SOURCE: Technomic

SOURCE: "FSR Touchpoints," Technomic, Darren Tristano, EVP Information Services, 300 S. Riverside Plz., #1940, Chicago, IL 60606; 312-506-3852; dtristano@technomic.com; www.technomic.com. Price: Call for information.

## Restaurant Food For Delivery: Households Phone It In On The Weekend

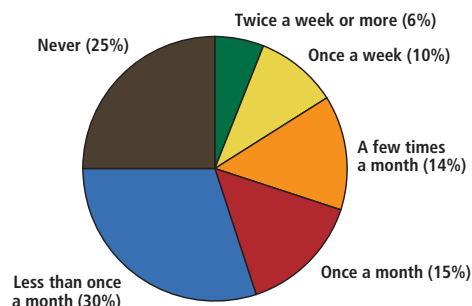
Friday (36%) and Saturday (24%) are the days when households most commonly order restaurant food for delivery, with Wednesday a distant third, accounting for 13%, according to Technomic. While 42% order delivery consistently throughout the year, 33% order more often in the winter.

A third (34%) are ordering delivery less often during the past year. Most have cut back because they are trying to save money (68%), but 36% have done so because they do

not like having to pay a fee for delivery, and 28% because they are trying to lose weight and are avoiding restaurant food.

A quarter of households never order delivery. They choose to forego it because they prefer to dine in restaurants (38%), they think delivery fees are too high (36%), the restaurants they like don't deliver (31%), and they do not like to wait (22%).

**HOW OFTEN CONSUMERS ORDER RESTAURANT FOOD FOR DELIVERY, 2010**



SOURCE: Technomic

SOURCE: Technomic, Darren Tristano, EVP Information Services, 300 S. Riverside Plz., #1940, Chicago, IL 60606; 312-506-3852; dtristano@technomic.com; www.technomic.com. Price: Call for information.

## Americans Enjoy Ease & Creativity Of Brunch

A majority of Americans (63%) visited a restaurant for weekend brunch in the prior three months, according to Technomic. Nearly one in 10 (9%) went out nine or more times during that period, 28% did so three to eight times, and 30% once or twice.

Americans enjoy brunch out because they believe that everyone can find something they like on a brunch menu (85%) and because brunch menus are more creative than lunch and dinner menus (64%). In addition, 68% would like to find items on restaurants' brunch menus that are not available on its lunch and dinner menus.

Women are more likely than men to decide to dine out for brunch based on the ability to order breakfast or lunch foods and as a way to celebrate an occasion. Men are more likely than women to select a brunch occasion because it is more relaxing than dining out during the workweek.

Those who choose not to dine out for brunch most commonly say it is because they are not hungry at brunch hours (34%), it is too expensive (33%), or that they do not have anyone to dine with (7%).

SOURCE: "The Wide Appeal Of Weekend Brunch," Technomic, Darren Tristano, EVP Information Services, 300 S. Riverside Plz., #1940, Chicago, IL 60606; 312-506-3852; dtristano@technomic.com; www.technomic.com. Price: Call for information.



## Americans' Fast Food Dining Occasions Extend To Breakfast

More than a third of Americans (37%) ate breakfast at a fast food restaurant in the prior month, according to Scarborough Research.

Those who visit fast food restaurants for breakfast are 22% more likely than the average American to have downloaded an online coupon, and 29% more likely to receive coupons via email or text message.

Perhaps because fast food breakfast diners tend to be younger, they are more likely than the general population to use social media:

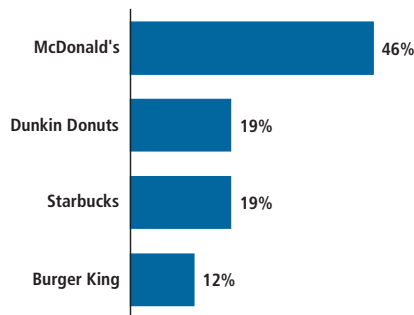
- ▶ 35% more likely than average to play fantasy sports;
- ▶ 25% more likely to visit social networking sites; and
- ▶ 21% more likely to contribute to a blog.

They are also more likely than the general population to download media, including:

- ▶ Movies (28% more likely);
- ▶ Music (25% more likely); and
- ▶ Videogames (21% more likely).

Though it may seem counterintuitive, those who visit fast food restaurants are more likely than average to participate in sports, including soccer (25% more likely), basketball (25% more likely), and tennis (18% more likely). They are also 14% more likely than average to belong to a health or fitness club.

FAST FOOD RESTAURANTS THAT AMERICANS VISIT FOR BREAKFAST, 2010



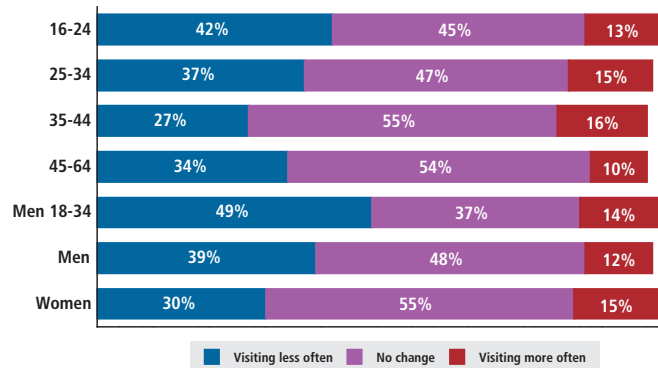
SOURCE: Scarborough Research

SOURCE: "USA+ Study," Scarborough Research, Alisa Joseph, VP Advertiser Marketing Services, 770 Broadway, New York, NY 10003; 646-654-8400; ajoseph@scarborough.com; www.scarborough.com. Price: Call for information.

## Fast Food Spots Hit By Recession Reduction

Quick service restaurants were not dramatically affected by the early stages of the recession — perhaps because they offer inexpensive, convenient dining options — but that may be changing as consumer cutbacks drag on. Although most Americans aged 16-64 (79%) visited a quick service restaurant in the prior month, that figure is down from more than 90% in 2005, reports Sandelman & Associates.

VISITS TO FAST FOOD RESTAURANTS COMPARED TO ONE YEAR PRIOR, 2010



SOURCE: Sandelman & Associates

A slight majority of fast-food diners (51%) continue to visit such restaurants at the same level of frequency as in the prior year, but 34% are going less often, compared to 13% who are going more often.

Men aged 18-34, one of the core consumers of fast food, are more likely than average (49% vs. 34%) to say they are cutting visits. Similarly, the youngest consumers, aged 16-24, are also more likely than average to cut back (42%). The segments that are most likely to increase their visits to fast food restaurants are heavy users (22%), defined as those who make 12 or more visits a month, and 35-44 year olds (16%).

SOURCE: "Where Are Fast-Food Users Dining When Not At Fast-Food?" Sandelman & Associates, Paul Clarke, Director Marketing, 25790 W. Apache Ln., Barrington, IL 60010; 847-277-7603; paul@sandelman.com; www.sandelman.com. Price: \$500.

## Fast Food Spending Slips Further In 2010

The average diner at quick-service restaurants spent \$5.19 per visit in the first half of 2010, down from \$5.43 in the first half of 2008, according to Sandelman & Associates.

Men spent an average of \$5.42, down 5% from the first half of 2008. Women spent an average of \$4.99, down 4% over the same period.

Those aged 16-34 spent an average of \$4.99, posting the greatest decline, down 7%. Those aged 35-64 posted the least decline, spending an average of \$5.34, down 3%.

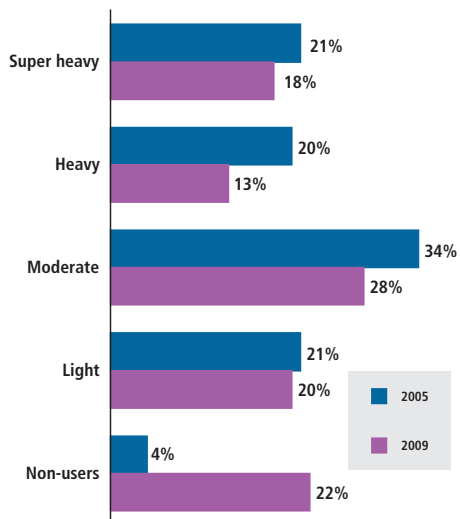
SOURCE: "Quick-Track," Sandelman & Associates, Paul Clarke, Director Marketing, 25790 W. Apache Ln., Barrington, IL 60010; 847-277-7603; paul@sandelman.com; www.sandelman.com. Price: \$500.

## Spanish-Speaking Hispanics Say No To Fast Food Restaurants

Nearly a quarter of Spanish-speaking Hispanics (22%) did not eat at fast food restaurants in the prior month, a proportion that has steadily risen since 2005 when only 4% did

not eat fast food, according to Sandelman & Associates. Meanwhile, heavy fast-food users — defined as those who eat fast food at least 12 times a month — fell from 41% to 31% over the same period.

**HISPANIC PATRONAGE OF FAST FOOD RESTAURANTS IN THE PRIOR MONTH, 2005 VS. 2009**



NOTE: Super heavy users make 20 or more visits to fast food restaurants per month; heavy users make 12-19 visits; moderate users make 4-11 visits; and light users make 1-3 visits.

SOURCE: Sandelman & Associates

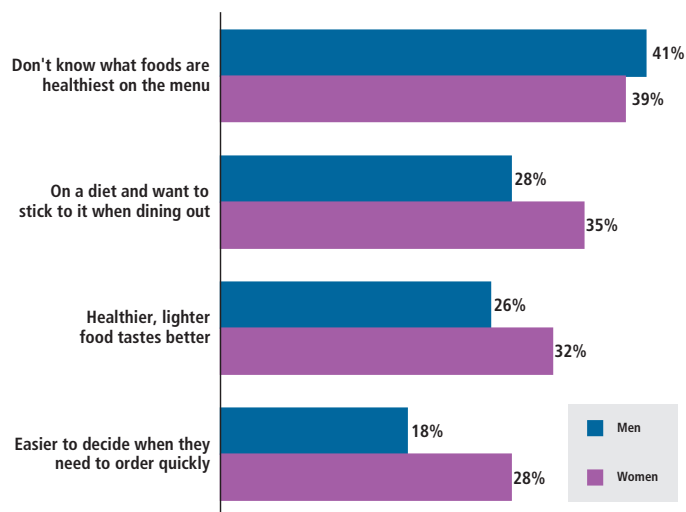
SOURCE: "National Hispanic Fast-Food Trends, 2009," Sandelman & Associates, Paul Clarke, Director Marketing, 25790 W. Apache Ln., Barrington, IL 60010; 847-277-7603; paul@sandelman.com; www.sandelman.com. Price: \$2,000.

## Most Diners Want Low-Cal Menu Options

More than three quarters of consumers (77%) would like to see lower-calorie menu options at restaurants, finds Technomic. That is more than would like to see menu items that accommodate allergies (53%), low-sodium items (52%), ingredient lists (51%), gluten-free items (27%), and peanut- and nut-free items (22%).

Most commonly, diners would like to see low-cal menus presented as a special section of regular restaurant menus (41%) or on a regular menu with a notation that they are healthy items (32%). Fewer (13%) would want to see such items listed on a separate insert handed out with the regular menu.

**REASONS RESTAURANT GOERS WOULD LIKE TO SEE LOWER-CALORIE OPTIONS ON MENUS, MEN VS. WOMEN, 2010**



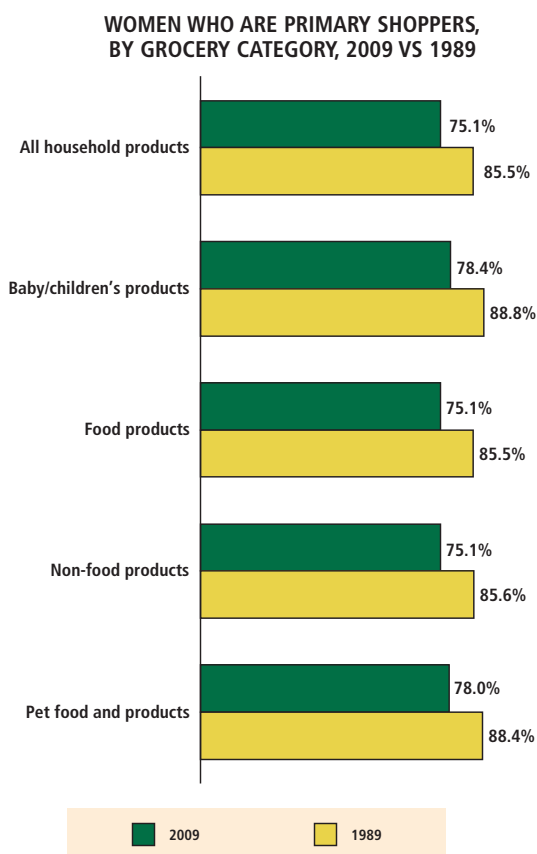
SOURCE: Technomic

SOURCE: "The Lighter Side Of The Menu," Technomic, Darren Tristano, EVP Information Services, 300 S. Riverside Plz., #1940, Chicago, IL 60606; 312-506-3852; dtristano@technomic.com; www.technomic.com. Price: Call for information.

## 80/20 Rule Becomes 75/25 Rule: Men Take On More Shopping Tasks

Women are 75% of primary household shoppers, down from 85% in 1989, finds Mediamark Research & Intelligence.

Women are transitioning from shoppers to workers, and as they become the primary breadwinners in their families, men are required to step in and fill their shoes as primary shoppers.



SOURCE: Mediamark Research & Intelligence

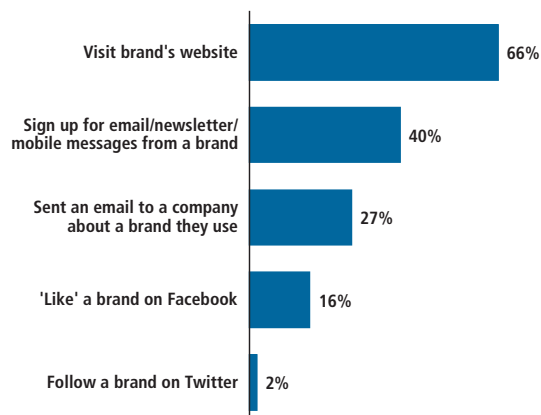
SOURCE: "Survey of the American Consumer, 2009," Mediamark Research & Intelligence, Anne Marie Kelly, SVP Marketing and Strategic Planning, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-884-9204; annemarie.kelly@mediamark.com; www.mediemark.com. Price: Call for information.

## Food Shoppers: In-Store Habits And Online Attitudes

A slight majority of consumers (53%) shop for groceries weekly and plan meals ahead of time, whereas 24% shop monthly with additional trips for fresh ingredients, and 21% shop for groceries as needed when they are preparing a recipe or meal, finds *Supermarket News*.

When in store, 81% of consumers seek our products on sale, 62% look for the store circular, and 60% always bring

## HOW CONSUMERS INTERACT WITH FOOD BRANDS ONLINE 2010



SOURCE: *Supermarket News*

coupons. The vast majority (77%) always brings a shopping list. Some 15% shop with a recipe in hand. Fewer than one in 10 (6%) shop using their mobile phone or PDA (for lists or coupons).

Most food shoppers have engaged with a brand they like online, but few have done so via social media.

SOURCE: "He Said, She Said Consumer Survey," *Supermarket News*, Mark Hamstra, Retail/Financial Editor, 249 W. 17th St., New York, NY 10011; 212-204-4343; mark.hamstra@penton.com; www.supermarketnews.com. Price: Available online at no charge.

## Demographic Differences In Household Food Spending

American households spent an average of \$6,433 on food in 2008 — the most recent year for which data are available — according to the Food Institute. That includes \$3,744 on food for at-home consumption in 2008, up from an average of \$3,021 in 2004. Households spent an average of \$2,698 on food away from home in 2008, up from \$2,137 in 2000.

Households headed by 35-54 year olds spent the greatest amount on food in 2008. Those aged 34-44 spent \$4,509 on food for home and \$3,340 on food away from home for a total of \$7,849. Those aged 45-54 spent \$4,452 on food for home and \$3,935 on food away from home for a total of \$7,696.

Seniors spent the least on food in 2008, an average of \$3,935. They spent 68% of their food budget on food for home consumption, a greater proportion than any other age group. Those aged 25 and under spent an average of \$4,447 on food. They spent 48% of their food budget on food away from home, a greater proportion than any other age group.

The presence of children in a household accounts for the significant increase in food spending by 35-54 year olds. Married couples with children spent an average of \$9,478 on food in 2008, compared to an average of \$8,255 spent by married couples without children. Single parent households spent an average of \$5,162, whereas singles without children

spent an average of \$4,480.

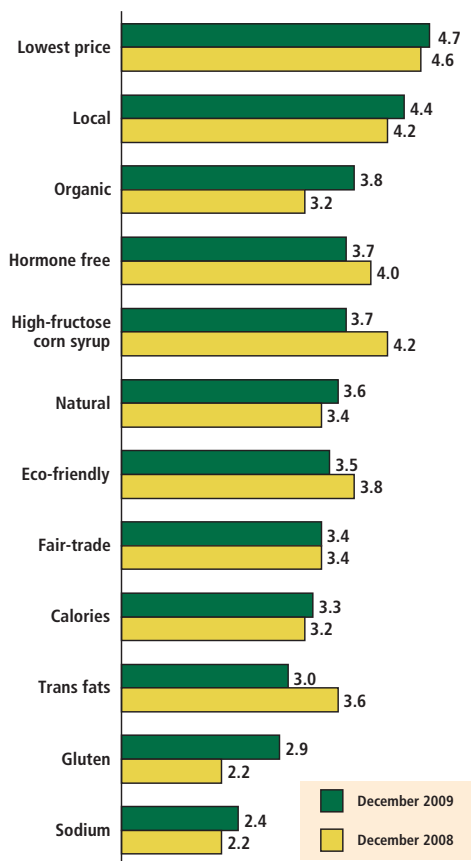
Not surprisingly, singles spent a greater proportion of their food budget than their older peers on food away from home (43%). Married couples with children aged 18 or older spent greatest amount on food away from home (\$4,267) — they are more likely than singles to be well into their careers and earn higher salaries, giving them more disposable income. Single parents spent 63% of their food budget on food for home consumption.

**SOURCE:** "Demographics of Consumer Food Spending," Food Institute, Sue Anista, Publications, 10 Mountainview Rd, #S125, Upper Saddle River, NJ 07458; 201-791-5570 x212; sanista@foodinstitute.com; www.foodinstitute.com. Price: \$129.

### Shoppers Prize Organic, Natural, But Price Still Reigns Supreme

Consumers continue to say price is the most important factor in their food purchase decisions, but organic, local, and natural products are of greater importance than they

CONSUMER CONCERNS WHEN MAKING FOOD PURCHASES, DECEMBER 2009 VS. DECEMBER 2008



NOTE: Ratings on a scale of 1 to 5 where 5 is the greatest concern.

SOURCE: The Consumer Network

were in the prior year, according to The Consumer Network. That may be more related to health issues than environmental consciousness because their concern about eco-friendly shopping declined compared to the prior year.

While gluten is near the bottom of the list, it posted the greatest gain year-over-year. Concerns about trans fats and high fructose corn syrup fell compared to the prior year.

**SOURCE:** "Food Concerns Shifting," The Consumer Network, *The Shopper Report* January 2010, Mona Doyle, Mona Doyle, PO Box 42753, Philadelphia, PA 19101; 215-235-2400; shopperreport@cs.com. Price: \$99 for a one-year subscription.

### By Definition, If Not Fact, Shoppers Find Organic, Natural Foods Not So Different

A third of grocery shoppers (33%) buy organic food at least once a month, up from 22% in 2000, and 42% buy it occasionally, up from 34% over the same period, reports Hartman Group.

To shoppers, distinguishing between organic and natural foods is something of a fool's errand. They regard the distinction between the two terms as being that organic is how a food is grown, whereas natural relates to how a food is processed after it is grown and before it enters the supermarket as an item for purchase. This explains why, in consumers' minds, the absence of additives such as artificial flavors, colors, or preservatives is more likely to be associated with natural products than organic products.

QUALITIES CONSUMERS ASSOCIATE WITH ORGANIC AND NATURAL FOODS, 2010

	ORGANIC	NATURAL
Absence of pesticides	69%	62%
Absence of herbicides	69%	59%
Absence of growth hormones	68%	59%
No artificial flavors, colors, or preservatives	66%	73%
Absence of genetically modified foods	63%	61%
Absence of antibiotics	63%	58%

SOURCE: Hartman Group

**SOURCE:** "State Of The Organic Consumer, 2010," Hartman Group, Laurie Demeritt, President, 1621 114th Ave. SE, #105, Bellevue, WA 98004; 425-452-0818, x106; laurie@hartman-group.com; www.hartman-group.com. Price: Call for information.

### Supermarket Shoppers Pick Up Prepared Meals

Prepared meals offer a middle ground between cooking at home and dining out — they require less work than cooking at home, while costing less than eating at a restaurant — says NPD Group. Supermarkets compete with fast food restaurants in the take-home meal business, and the former is winning two-thirds of the time. Shoppers gravitate to supermarkets over fast food restaurants because of the variety of choices as well as the availability of healthy options.

They prefer fast food restaurants for specific cravings and for the convenience of pick up via drive thru.

#### FACTORS THAT INFLUENCE SHOPPERS TO PICK UP PREPARED MEALS, SUPERMARKETS VS. FAST FOOD RESTAURANTS, 2010

	SUPERMARKETS	FAST FOOD RESTAURANTS
Convenient location	43%	40%
Good price	27%	24%
Like it there	25%	31%
Regularly go there	23%	19%
Did not have time, were in a hurry	20%	15%
Good variety to choose from	18%	10%
Went for a specific menu item	14%	19%
Had a special craving	13%	22%
Healthy choices	10%	5%
Has take out window/drive thru/delivery	5%	17%
Wanted a treat/reward	3%	7%
Kids like it there	2%	10%

SOURCE: NPD Group

SOURCE: "DeliTrack," NPD Group, Ann Hanson, Executive Director Product, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-0700; ann\_hanson@npdgroup.com; www.npdgroup.com. Price: Call for information.

## Convenience Store Shoppers Want Healthier Food And Drink Options

Nearly two thirds of consumers (63%) shop at a convenience store at least once a week, but only 53% of those buy a food or beverage item, according to Technomic. One reason they don't purchase more of those types of items is because only 28% think that convenience stores do a good job of offering healthy options. Most shoppers (52%) would like to find more healthy food options in convenience stores, and 47% would like more healthy beverage options.

Convenience store shoppers who buy food and beverages at convenience stores most commonly choose made-to-order items. They most often buy:

- ▶ Sandwiches (57%);
- ▶ Salads (50%);
- ▶ Beverages (48%); and
- ▶ Hot foods (46%).

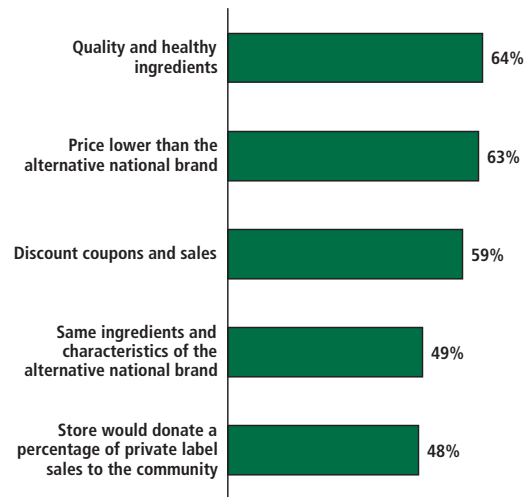
Consumers who shop for food at convenience stores also commonly visit fast food restaurants for meals, including 49% who do so for breakfast, 47% for lunch, and 32% for dinner.

SOURCE: "Convenience Store Food Trends," Technomic, Darren Tristano, EVP Information Services, 300 S. Riverside Plz., #1940, Chicago, IL 60606; 312-506-3852; dtristano@technomic.com; www.technomic.com. Price: Call for information.

## Trend: Hispanic Shoppers Warm To Private Label Brand Groceries

One in 10 Hispanic shoppers (10%) never buy private label products, and 48% do so only sometimes or rarely.

#### FACTORS THAT INFLUENCE HISPANICS TO TRY NEW PRIVATE LABEL GROCERY PRODUCTS, 2009



SOURCE: Food Marketing Institute

However, Hispanics (73%) agree that private label brands offer a great value for the money, and 64% believe that store brands are as good as national brands.

More than a third of Hispanic shoppers (37%) bought more private label products in 2009 than in previous years, and 25% plan to buy more in 2010 than they did in 2009, reports the Food Marketing Institute. Private label products account for 31% of Hispanic's grocery purchases, for an average spending of \$85.94 every two weeks. Hispanics are a particularly desirable market for grocery retailers because they spend a higher-than-average amount on groceries every year to provide for their large families. Hispanics aged 18-24 spend a higher than average amount on private label products every two weeks (\$99.41), and those aged 25-39 (42%) are more likely than average to plan to spend more on private label products in 2010.

Hispanics are most likely to buy private label products in the following categories:

- ▶ Dairy (54%);
- ▶ Paper products (41%);
- ▶ Carbonated beverages, soda, or bottled water (35%);
- ▶ Cleaning supplies (34%); and
- ▶ Cereals and other breakfast products (34%).

SOURCE: "Se Habla Isn't Enough: Private Label Brands Among Hispanics 2009," Food Marketing Institute, 2345 Crystal Dr., #800, Arlington, VA 22202; 202-452-8444; www.fmi.org. Price: \$350 for non-members, \$250 for associate members, and \$150 for retailer/wholesaler members.

## Grocery Shoppers Price-Sensitive, But Spending Remains Steady

Most households (54%) spend more than \$95 on food shopping every week, according to the National Grocers Association. This is the third straight year that most families spent in excess of that amount, which researchers say represents a push-pull between making more meals at home and the intense saving practices of primary household shoppers. The vast majority of households (89%) have home cooked meals at least three times a week, and 57% have leftovers at least twice a week.

At the upper echelon, slightly fewer households (14%) are spending more than \$135 per week on groceries, down from 16%.

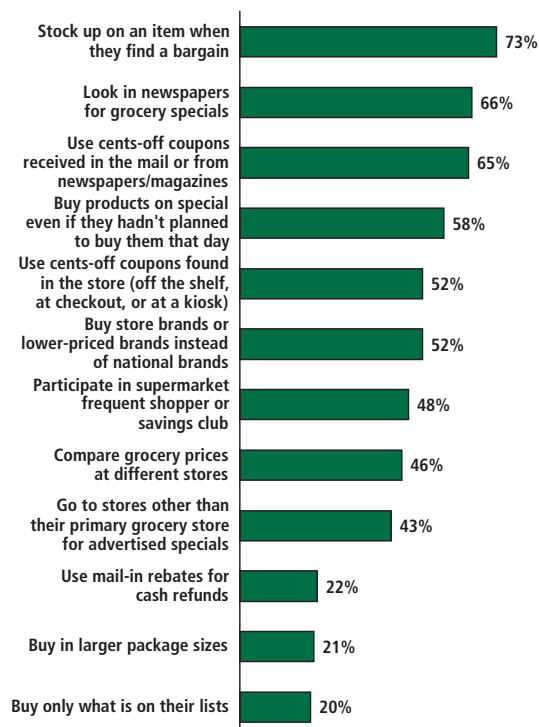
Shoppers are also slightly more likely to report visiting grocery stores two times a week (29%, up from 27%), and less likely to shop once a week (35%, down from 37%).

When trying a new grocery product for the first time, shoppers are most influenced by price, with 78% saying they almost always look at cost before deciding to buy. Most (51%) also look at preservatives or additives in food before trying something new, up from 42% in 2009. More than four in 10 (44%) check the product's brand name, and 43% check health claims, up from 39%. Least important are where the product was made (38%) and organic claims (28%).

The vast majority of shoppers (82%) have used social media to exchange information about food, including discussing new products, nutrition, and recipes. Nearly one in five (19%) use Facebook to do so, 6% use Twitter, and 2% YouTube, but 55% use other sites.

**SOURCE:** "2010 Consumer Panel Survey," National Grocers Association, 1005 N. Glebe Rd., #250, Arlington, VA 22201; 703-516-0700; info@nationalgrocers.org; www.nationalgrocers.org. Price: Available online at no charge.

### FACTORS THAT INFLUENCING GROCERY SHOPPERS' PURCHASES, 2010



SOURCE: National Grocers Association

## Home Cooking Is Important To Most Families

The vast majority of households (84%) cooks or prepares a meal at home at least once a week, according to Masterbuilt, which makes cooking equipment. While only 54% of people identify themselves as cooking enthusiasts, 92% experiment with new recipes or try new types of food. When they need help, 39% ask their mothers for cooking advice.

Additional findings include:

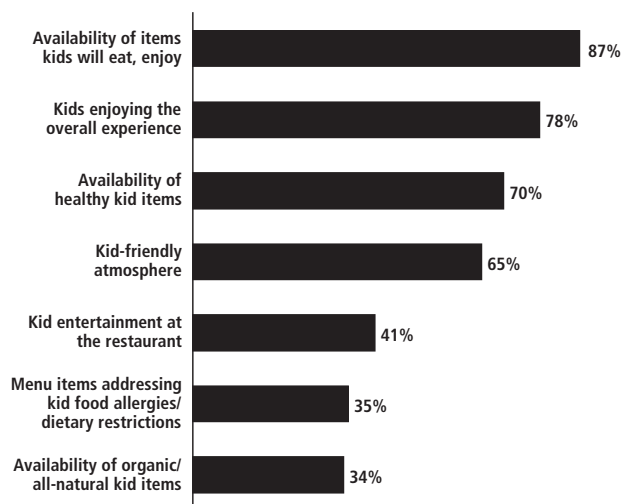
- ▶ 86% of households say cooking at home is more important than it was in the prior year;
- ▶ 81% say family dinners are more important; and
- ▶ 31% say eating out at a restaurant is more important.

**SOURCE:** "Cooking Habits Survey," Masterbuilt, Don McLemore, VP, 1 Masterbuilt Ct., Columbus, GA 31907; 706-327-5622; dmclmore@masterbuilt.com; www.masterbuilt.com.

## Moms Seek Kid-Approved Food At Restaurants

Moms' primary concern when taking their children to restaurants is whether their kids will eat and enjoy the meal (87%), according to WhyMomsRule.com by Bohan Advertising. They also want to ensure their children have an enjoyable experience (78%) and be able to order kid-friendly healthy meals. Four in 10 (41%) would also like to see kids' entertainment while dining.

IMPORTANCE OF KID-FRIENDLY RESTAURANT ATTRIBUTES, ACCORDING TO MOMS, 2010



**SOURCE:** WhyMomsRule.com

**SOURCE:** WhyMomsRule.com (Bohan Advertising), David Bohan, Founder, 124 12th Ave. S., Nashville, TN 37203; 615-327-1189; davidb@bohanideas.com; www.bohanideas.com.

## Half Of Tweens Always Eat Meals With Family

Nearly half of 7-12-year-olds (46%) "always" eat their main meal at home with their family, according to Ikea. Only two in 10 parents (21%) say they rarely have time to eat together as a family. Even though 56% of tweens feel it's more fun to eat while watching TV, only 26% of parents say their children regularly are allowed to do so.

**SOURCE:** Ikea, Mona Astra Liss, 420 Alan Wood Rd., Conshohocken, PA 19428; 610-834-0180, x5852; mona.liss@memo.ikea.com; www.playreport.org.

## Change School Lunches, Say Parents And Kids

A majority of parents (63%) and children (55%) describe school food as "poor" or "only fair," according to the W. K. Kellogg Foundation. Seven in 10 adults (70%) want pizza banned from schools, and 60% would like to see hamburgers and chicken nuggets eliminated as well. Some 85% want fresh — not canned — fruits and vegetables offered daily on school lunch menus.

**SOURCE:** W.K. Kellogg Foundation, Gail Christopher, VP Programs, One Michigan Ave. E., Battle Creek, MI 49017; 269-968-1611; www.wkcf.org.

## Kids Say Licensed Characters On Wrapping Makes Foods Taste Better

Licensed characters on food packaging affect a kid's food selection and even whether they think it tastes good, according to the Rudd Center for Food Policy and Obesity at Yale University.

Researchers gave 4-6-year-olds three identical food products — graham crackers, gummy fruit, and carrots — in packages with and without popular cartoon characters. Kids are significantly more likely to say graham crackers and gummy fruit taste better when they are wrapped in a cartoon character packaging. Kids, however, say carrots taste the same regardless of their packaging. Even children who did not prefer the taste of the licensed-character samples preferred those snacks over their equivalents in plain packaging.

Licensed characters on food packaging remain a powerful lure for children. However, these findings suggest that since characters are not as helpful in getting kids to consume healthier products, the best way to encourage healthier eating habits among children is to ban licensed characters on junk food packaging.

**SOURCE:** Rudd Center for Food Policy and Obesity, Yale University, Rebecca Gertsmark Oren, Director of Communications, PO Box 208369, New Haven, CT 06520; 203-436-2513; rebecca.oren@yale.edu; www.cerealfacts.org.

## Kids, Teens Are Eating More Yogurt, Potato Chips, Fresh Fruit As Snacks

Those age 2-17 ate more refrigerated yogurt in 2009 than they did in 2008, making yogurt the top growing snack food among this age group, according to NPD Group. Potato chips, fresh fruit, and string cheese also grew year-over-year as snack foods eaten between, with, and instead of meals.

### TOP GROWING SNACK FOOD CATEGORIES AMONG 2-17-YEAR-OLDS

(Change in annual eating per capita 2009 vs. 2008)

1. Refrigerated yogurt
2. Potato chips
3. Fresh fruit
4. String cheese/prepared cheese cubes/shapes
5. Hard candy
6. Ice/fudge/cream pops
7. Chewy candy
8. Corn chips
9. Donuts
10. Snack pies/pastries

**SOURCE:** NPD Group

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**SOURCE:** NPD Group, Kim McLynn, 900 West Shore Rd., Port Washington, NY 11050; 847-692-1781; kim.mclynn@npd.com; www.npd.com.

## Collegians Seek Comfort Foods With Edge

College students are asking for comfort food with some exotic flavoring in 2010, according to foodservice provider Sodexo. The company holds taste-tests and consults with chefs and vendor partners to develop the list of foods expected to appear on college menus in the upcoming school year.

Food preferences also vary by region. Students attending school in the South Central U.S. prefer red beans and rice, students in the Midwest favor home-style roast beef, the Northwest tends to enjoy classic carved turkey, chicken pot pie is preferred by students in the Mid-Atlantic region, those in the Southeast like traditional meatloaf, and Southwest students favor fish tacos.

### FOOD TRENDS AMONG COLLEGE STUDENTS, 2010

1. Apricot-glazed turkey
2. Meatloaf with frizzle-fried onions
3. Vietnamese Pho (rice noodle soup)
4. Vegetarian lentil shepard's pie
5. Chicken adobo (Mexican stew with chilies)
6. Stuffed pork chops
7. Vegetarian jambalaya
8. Lemon herbed baked tilapia
9. Rotisserie chicken
10. Home-style pot roast

**SOURCE:** Sodexo

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**SOURCE:** Sodexo, Monica Zimmer, 9801 Washingtonian Blvd., Gaithersburg, MD 20878; 301-987-4461; monica.zimmer@sodexo.com; www.sodexousa.com.



## factoids

- ▶ While 45% of consumers trust the label “**organic**” and 33% trust “**natural**,” 30% do not trust either label. (*Mintel*, phone: 312-628-7946)
- ▶ Some 37% of Americans watch the amount of **salt** they consume by limiting the amount they use to cook or by reading food labels, compared to 24% who are not at all concerned about their salt intake. (*Council For Responsible Nutrition*; phone: 202-204-7684)
- ▶ Half of U.S. households (50%) use meal planning as a way to save money on their **food budget**. (*Fleishman-Hillard for Bumble Bee Foods*; phone: 619-237-7718)
- ▶ Most Americans (52%) think the Cheerios brand represents **good value** for the money, and 50% think the same of the Campbell’s Soup brand and the Subway brand. (*TNS Landis*; phone: 866-630-9500)
- ▶ Only 3% of consumers are decreasing the amount of **organics** they purchase at the grocery store due to the recession, compared to 40% who are maintaining their organic buying habits; nearly half of Americans (45%) trust the organic label on foods. (*Mintel*; phone: 312-628-7946)
- ▶ Nearly half of families (47%) eat **dinner** at home together every night of the week. (*NPD Group*; phone: 847-692-1781)
- ▶ Half of Americans (50%) choose beef when they are preparing a **celebratory meal**, compared to 18% who choose chicken, 17% pork, and 15% fish. (*National Cattlemen’s Beef Association*; phone: 303-850-3456)
- ▶ Retail sales of **liquor** by volume increased 2.2% in 2009 as people entertained at home more often; meanwhile, sales at bars, restaurants, and hotels slumped in volume by 3.0%. (*Source: Distilled Spirits Council*; phone: 202-628-3544)
- ▶ **Grocery shoppers** most commonly buy organic fruit and vegetables (26% and 25%, respectively), followed distantly by organic eggs (17%). (*Tab’s Group*; phone: 203-925-9157)
- ▶ More than three quarters of Americans (77%) would like **food products** to come with labels that warn them of high calories or low nutrients, and 64% would stop eating or eat less of their favorite foods if those came with warning labels. (*FoodMinds*; phone: 773-960-3960)
- ▶ A third of Texans (34%) say it’s easier for them to get reservations at hard-to-get-into **restaurants** during the recession, and 23% make their dining reservations online, up from 11% two years prior. (*Zagat*; phone: 212-404-6416)
- ▶ Nearly half of restaurant goers (48%) would like to find foods on the menu that are made with **artificial sweeteners** — most commonly cake (62%). (*Technomic*; phone: 312-506-3852)
- ▶ A slight majority of Americans (56%) oppose a **tax on soft drinks** that lawmakers suggest would improve public health, and 86% do not think that the government should dictate what citizens eat and drink. (*American Beverage Association and Rasmussen Reports*; phone: 202-463-6770)
- ▶ Four in 10 Americans (40%) claim they would not forego their **favorite foods** for any amount of cash, and another 50% say it would take \$100,000 or more to give them up. (*American Heart Association*; phone: 214-706-1538)
- ▶ Although nearly half of **organic shoppers** continue to buy as much or more organic foods as in the past, 21% have cut back or eliminated organic purchases, and 20% are buying cheaper organic products. (*Mintel*; phone: 312-628-7946)
- ▶ While consumers spent 0.8% less in **restaurants** in 2009, the average check per person grew 3% to \$5.82. (*NPD Group*; phone: 847-692-1781)
- ▶ Eight in 10 households (80%) want a faster and easier way to **clean up** after cooking a meal, without sacrificing quality. (*Reckitt Benckinsen*; phone: (44) 1753-217800)
- ▶ A majority of Americans (53%) frequently read the **ingredient list** on the packaged food they purchase, but only 45% of those understand at least three quarters of the ingredients listed. (*Deloitte*; phone: 203-708-4406)
- ▶ One in six primary grocery shoppers for their household (17%) have bought **groceries via the Web**. (*Burst Media*; phone: 781-272-5544)
- ▶ Nearly half of Americans (46%) choose to eat different types of **chocolate** depending on their moods; when they need an escape, 55% choose milk chocolate, 44% chocolate with nuts, 35% dark chocolate, and 23% white chocolate. (*Lindt*; phone: +41 44-716-23-98)
- ▶ Nearly a quarter of shoppers (23%) have visited a **food company’s website** to learn more about a product, and 23% have made a purchase based on something they read online. (*Deloitte*; phone: 203-708-4406)
- ▶ Shoppers pay an average of \$1.63 for a **dozen eggs**, 92% of which are “regular” eggs, 2% are from cage-free hens, and 1% are organic. (*United Egg Producers*; phone: 520-398-7379)
- ▶ One in eight restaurants (13%) included a dish featuring **sweet potatoes** on its menu in 2009, double the proportion in 2005. (*Datassential*; phone: 877-886-3687)
- ▶ Younger consumers are more likely than older consumers to say “gourmet” and “prime” are indicators of **food quality**, ranking gourmet 4.4 (versus 3.8 for older consumers) and prime 4.3 (versus 3.4) on a scale of 1 to 5 where 5 is high quality. (*The Consumer Network*; phone: 215-235-2400)
- ▶ The value of a **coupon** is more likely to influence a shopper to buy a new product (68%) than the store where it can be used (13%). (*M/A/R/C research*; phone: 303-393-3474)

**FAST FACT:**

**Dining Out**

- ▶ Women with children living at home are 13% less likely than adults overall to eat out at full service restaurants.

**SOURCE:** The Media Audit, Robert Jordan; 800-324-9921; rjordan@themediiaudit.com;

- ▶ The vast majority of people who own an **electric tea kettle** (81%) use it every day. (*Aroma Housewares; phone: 58-587-8866*)
- ▶ Nearly half of moms (49%) do not buy **organic deli meats** because they think they are too expensive, while 26% do not buy them because they cannot find them in their local supermarkets. (*Applegate Farms; phone: 866-587-5858*)
- ▶ The most popular **martini flavor** in restaurants is apple (38%), followed by chocolate (24%), lime (23%), and cranberry (19%). (*Datassential; phone: 888-556-3687*)
- ▶ The most popular **martini flavor** in restaurants is apple (38%), followed by chocolate (24%), lime (23%), and cranberry (19%). (*Datassential; phone: 888-556-3687*)
- ▶ More than a third of Americans (36%) visited a **fast food restaurant** in order to purchase only a beverage in 2010, up from 24% in 2008. (*Technomic; phone: 312-506-3848*)
- ▶ Restaurant diners' most common strategies for healthy **eating out** include choosing low fat options (67%), eating more fruits and vegetables (52%), and ordering less food to reduce their calorie intake (49%). (*Mintel; phone: 312-628-7946*)
- ▶ Eight in 10 households (80%) want a faster and easier way to **clean up** after cooking a meal, without sacrificing quality. (*Reckitt Benckinsen; phone: (44) 1753-217800*)
- ▶ Nearly all Americans (97%) eat **pasta**, with 22% citing spaghetti as their favorite noodle, and 74% preferring marinara, alfredo, or meat sauce. (*Olive Garden; phone: 407-245-5642*)
- ▶ Seven in 10 moms (70%) say it is a struggle to get their children to eat at the dinner table, and about 50% say their kids complain about what they **make for dinner** at least once a week. (*French's/Reckitt Benckiser; phone: 973-404-2600*)
- ▶ Most 63% Chicago parents say their greatest concern is saving money at **mealttime**, 58% fret about finding healthy meal options while sticking to a budget; and 46% want ways to make meal preparation easier. (*Jewel-Osco; phone: 630-948-6211*)
- ▶ More than one in five **tailgaters** (22%) consider themselves "gourmet grillers;" they spend an average of \$1,001 per year on tailgate parties, hosting an average of 20 people per party. (*Weber-Stephen; phone: 224-836-2724*)

- ▶ Philadelphia residents **dine out** an average of 2.5 times per week; 41% make restaurant reservations online and 86% visit a restaurant's website before dining there. (*Zagat; phone: 212-404-6416*)
- ▶ The average **restaurant check** for a meal in Los Angeles declined for the first time in more than two decades to \$34.85, and 40% of Angelenos are eating out less often. (*Zagat; phone: 212-404-6416*)
- ▶ Although the average price of a meal in Washington, DC (\$35.99), and Baltimore, MD (\$34.29), was stable compared to 2009, 38% of residents are **eating out** less and 52% are seeking deals on meals. (*Zagat; phone: 212-404-6417*)
- ▶ Most people (83%) say **family meals** are among their most cherished memories, and 53% wish they had more time to eat together. (*MS&L for Carrabba's; phone: 212-468-4334*)
- ▶ A quarter of moms (25%) say it is easy to find fruit on the menu at a **fast food restaurant**, and 19% say it is easy to find vegetables on fast food menus. (*Produce For Better Health Foundation; phone: 302-235-2329, x326*)
- ▶ Two thirds of those planning to cook a Thanksgiving meal (66%) will prepare it entirely from scratch, up 11% from 2009. (*Allrecipes.com from Reader's Digest; phone: 206-708-9271*)
- ▶ A quarter of moms (25%) say it is easy to find fruit on the menu at a **fast food restaurant**, and 19% say it is easy to find vegetables on fast food menus. (*Produce For Better Health Foundation; phone: 302-235-2329, x326*)
- ▶ Nearly 63% of **restaurant goers** think it is rude for diners to talk, text, and tweet on their cell phones while at the table; however, 83% say it is okay to take pictures of food and friends. (*Zagat; phone: 212-404-6416*)
- ▶ More than 60% of **wine drinkers** say that the grape varietal is the most important consideration in their purchase decision, followed by the wine's country of origin (50%). (*Vibrant Rioja; email: anafabiano@vibrantrioja.com*)
- ▶ A majority of White and Hispanic children (58%) eat **breakfast** daily, compared to 41% of Black children. (*American Dietetic Association; phone: 800-877-1600, x4769*)

**ALCOHOLIC BEVERAGES WOMEN PREFER TO DRINK, 2010**

Wine .....	.41%
Liquor .....	.26%
Beer .....	.25%

**SOURCE:** Glamour; phone: 212-286-2860

# health & beauty aids

Women enjoy talking about and sharing their beauty finds with their friends and family. Most women say age is just a number, but they still want to look and feel young. Those aged 40 and over invest in anti-aging products to help them do so. In fact, most would buy more anti-aging products if they were less expensive.

Women flock to Walmart for their health and beauty purchases, and they're not ashamed to say they go there for deals on drugstore cosmetics and skincare. They are occasionally frustrated when the product they want is out of stock. Cost is a factor in choosing personal care products, but women are willing to spend extra for product that delivers the best results.

Hispanic women are particularly beauty savvy and shop a wide range of cosmetic price points. They spend significantly more on skincare and bodycare than the general market. They would feel better served by cosmetic and personal care brands if they could find packaging that features women who look like them and bilingual text.

## Painted Ladies: What Makeup Women Wear Each Day, Fall Trends, And Their Current Purchasing Habits

Nearly all women wear some makeup, with married women 25-34 with children the most likely to paint their faces, according to Mintel. Eye makeup is the largest segment, accounting for 41% of the \$2.5 billion color cosmetics market. Three in four women (75%) regularly wear lipstick or lip gloss, with older women preferring lipstick while younger women favor gloss.

The oft-repeated “lipstick index” that finds women still purchase small priced luxuries such as cosmetics, even during a recession has proven true during this economic downturn, according to many beauty brands. “Women are still buying, but they are taking less of a chance and sticking with what they know works,” says cosmetic company Smashbox’s Lori Taylor. Some 75% of cosmetics purchases come from products under L’Oreal, Procter & Gamble, and Revlon brands.

Makeup is an industry that tends to track numerous smaller trends, while larger habits and behaviors remain set in stone. In other words, women may shift to a lighter lipstick color, but the number of lipstick wearers remains constant.

### Savvy Shoppers

As a result of the recession, women are undeniably savvy about their purchases and they are seeking more value in what they buy. In turn, cosmetic companies are providing more multi-use or faceted products, such as cosmetic sets that include a variety of products such as mascara, blush, and foundation, says cosmetic brand Korres’ Annia Spahr.

More than half of cosmetic purchases are made at drug stores and an additional third come from Walmart. Those who buy cosmetics at retail have come to expect that all stores — mass, drug, or department — accept returns, says Taylor, adding that it’s a notable shift since flexible return policies were previously a key selling only point at higher-end chains such as Sephora and Nordstrom. “It’s definitely trickled down, but it’s a good thing since it gets women back in the store,” says Taylor.

The Internet is fast becoming a key resource for women cosmetic shoppers, especially since 47% prefer to be left alone when shopping for cosmetics, according to Mintel. Among online shoppers, one in 10 women has purchased cosmetics from an online retailer, with 8% using a department chain/mass merchant website, 8% from Wal-Mart.com, 8% from Target.com, and 5% from a drug store’s site.

### Color Trends

Although beauty brands aren’t collectively parroting buzz words such as “retinols” or “serum,” as they have in previous years, the majority feel the top concern for today’s

woman is perfect skin tone. “Even skin tone is the top desire sought by women of all ages,” says cosmetic brand Cover FX’s Wanda Longo. “They equate uniform skin with youthfulness and everyone wants to diminish fine lines and wrinkles.” In fact, three in four women skincare users (75%) “use skincare products to look the best they can for their age,” according to NPD Group, with 53% citing anti-aging benefits as “very” or “extremely” important.

Companies are also addressing ailments that contribute to aging skin. Dermalogica is introducing its “UltraCalming” collection to help women with sensitive skin acquire a flawless complexion. Cover FX’s line includes products addressing acne, redness, and under eye circles.

Mineral makeup continues to be a growth driver, with numerous brands, including Cover FX, Smashbox and L’Oreal, introducing new product offerings containing the substance. Taylor says Smashbox’s “Halo Powder” mineral line is now its number two seller after launching only two years ago. The company is expanding the Halo line to include bronzer and yellow color correction mineral powder this fall.

Cool colors are expected to be popular this fall, says many manufacturers. Many companies are introducing “peacock” shades, such as teal, navy, and gold, in lipsticks, eye shadows, and eye liner.

### Aging Down

Some 95% of girls aged 15-17 and 88% of girls aged 12-14 wear makeup. Tweens tend to wear brands such as Wet n’ Wild and Mary Kay, whereas teens gravitate towards Maybelline, Revlon, and Neutrogena. Beauty brands attribute the increase in young consumers buying their products to the Internet. “They are really savvy, they do their own research and know exactly what brands and products they need,” says Korres’ Spahr.

While the majority of brands aren’t age specific, Dermalogica has created its own separate brand, Clean Start, to specifically target tweens and teens. “It’s under the same umbrella but it addresses their unique concerns like oily skin and breakouts,” says the company’s Nathalie Banker. Dermalogica reaches out via social media, the My Beauty mobile bus tour, and via eco-friendly efforts. Consumers, for instance, receive a reusable water bottle with a \$35 purchase. The teen line’s intent is to teach teens how to treat their skin, but will hopefully get them to gravitate to other Dermalogica products — such as anti-aging — when the time comes.

MAKEUP SALES		
	DOLLAR	%
Eye makeup	\$1,016 million	41%
Face makeup	\$929 million	37%
Lip makeup	\$556 million	22%
<b>TOTAL</b>	<b>\$2,500 MILLION</b>	<b>100%</b>

SOURCE: Mintel

**SOURCES:** Cover FX, Wanda Longo, International Communications Director, 1681 Flint Rd., Toronto, ON Canada M3J 2W8, 416-665-7444, x211; wlongo@coverfx.com; www.coverfx.com.

Dermalogica, Nathalie Banker, 1535 Beachey Pl., Carson, CA 90746; 310-900-0836; nbanker@dermalogica.com; www.dermalogica.com.

Korres, Annia Spahr, Marketing Coordinator, 584 Broadway, #1008, New York, NY 10012; 212-226-544; annia@korres.com; www.korres.com.

Mintel, Kay Fay, Senior Beauty and Personal Care Analyst, 351 W. Hubbard St., Chicago, IL 60610; 312-932-0400; kfay@mintel.com; www.mintel.com.

Smashbox, Lori Taylor, Pro Artistry Relations, 8538 Warner Dr., Culver City, CA 90232; 310-558-1490, x474; lori@smashbox.com; www.smashbox.com.

## They Come From Beyond: Gamma Women Offer Different Perspective On Beauty

“Gamma women,” defined as highly influential women who share their information over multiple channels, possess distinctly different attitudes towards beauty products than women in general, according to Meredith’s “Gamma Beauty Study.”

Gamma women, for instance, are more likely than women in general to use beauty products containing organic/natural/sustainable ingredients. Two in three (64%) also employ anti-aging products in their cosmetics arsenal. For the majority (74%), a change in seasons brings a change in beauty routines.

Gamma women prefer purchasing their beauty products at mass retailers (79%) and drug stores (56%) over department stores (45%) and supermarkets (36%).

Millennial Gamma women (66%) are more likely than Gen X (59%) and Boomer Gamma women (45%) to believe having a “pretty face” is essential to their definition of beauty. In general, Gamma women feel self-confidence, a positive out-

look in life, a sense of humor, and an engaging smile make someone beautiful.

**SOURCE:** “Gamma Beauty Study,” Meredith Publishing Group, Nancy Weber, CMO, 1716 Locust St., Des Moines, IA 50309; 515-284-3000; nancy.weber@meredith.com; www.gammawomen.com.

## To Most Women, Age Is Just A Number

Women approaching milestone birthdays (ages 30, 40, 50, and 60) feel a range of emotions about the big event, according to Cutera, a manufacturer of cosmetic lasers. They overwhelmingly want to do something to improve their skin’s appearance (81%). Those approaching 30 or 40 are most interested in improving uneven skintone (23%) and texture (15%). Those approaching 50 or 60 are focused on dealing with wrinkles (33%) and fine lines (30%).

More than a third of women (35%) feel optimistic about turning older because it means they are wiser and smarter. Nearly a quarter (21%) are conflicted because they don’t feel as old as they look. Only 23% are anxious about getting older. Those approaching 30 (30%) are more likely than those approaching 60 (14%) to feel this way. That said, 64% of women nearing milestone birthdays take steps to look younger, including:

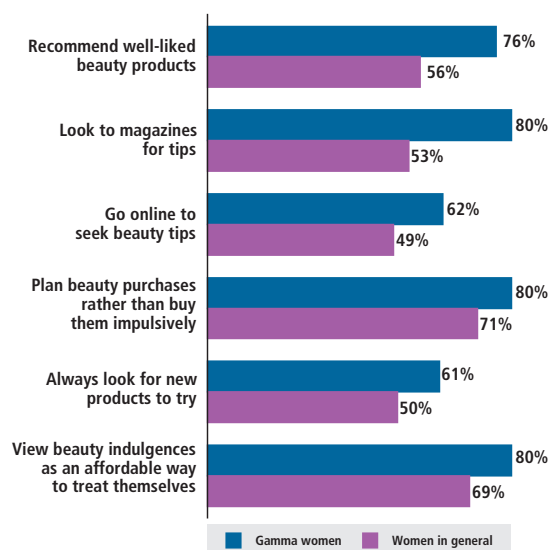
- ▶ Coloring their hair (43%);
- ▶ Wearing makeup (36%);
- ▶ Buying expensive skincare products (16%); and
- ▶ Shopping for younger-looking outfits in the juniors department (7%).

Fewer women than conventional wisdom would assume lie about their age (5%) and stop celebrating birthdays (2%).

Given their choice of any gift for their milestone birthday, women are more likely to choose a fabulous vacation (31%) than losing weight (25%) or looking 10 years younger (9%).

**SOURCE:** “Women Approaching Milestone Birthdays,” Cutera, Ken Witte, VP Marketing & Clinical Development, 3240 Bayshore Blvd., Brisbane, CA 94005; 415-657-5500; info@cutera.com; www.cutera.com.

**WOMEN’S ATTITUDES ON BEAUTY, GAMMA VS. WOMEN IN GENERAL**



**SOURCE:** Meredith

## I Feel Pretty, Oh So Pretty (31); Devil Wears Prada (39); Got Satisfaction (45)

More than eight in 10 women (81%) are happy at their current age, though 56% wouldn’t mind being five years younger, according to *Allure* magazine. Women are most likely to feel most beautiful at age 31, most powerful at age 39, and achieve the greatest sense of overall satisfaction at age 45.

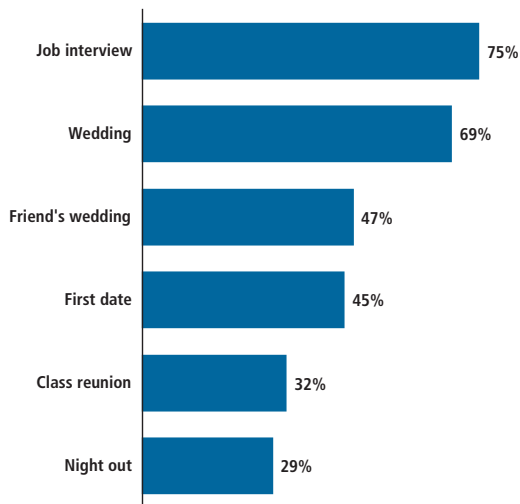
Women concede some anxiety over aging. Nearly three in four (72%) admit to being afraid of looking old, with another 70% concerned about losing their looks. That said, 79% believe in aging gracefully and accepting any changes. Only 17% believe the best way to stay young is through plastic surgery.

**SOURCE:** *Allure*, Jill Friedson, Associate Publisher, 4 Times Sq., 10th Fl., New York, NY 10036; 212-286-2458; jill\_friedson@condenast.com; www.allure.com.

## Work Bumps Romance In Looks Department

Women feel it's more important to look their very best for a job interview than on their wedding day, according to the Florida Department of Citrus. They also prefer to look more beautiful during a friend's wedding than on a first date (though perhaps many see a friend's wedding as a pick-up opportunity) or their class reunion.

OCCASIONS WHEN WOMEN NEED TO LOOK THEIR VERY BEST



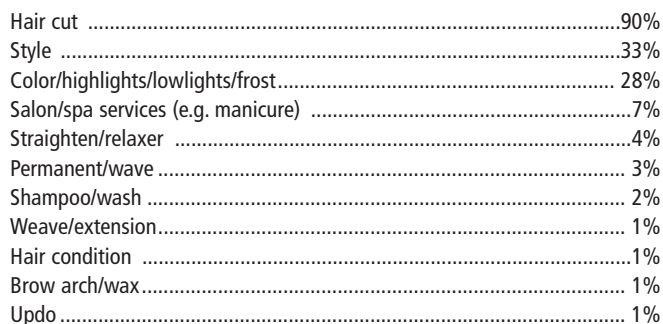
SOURCE: Florida Department of Citrus

SOURCE: Florida Department of Citrus, Karen Mathis, Bob Crawford Agricultural Center, 605 E. Main St., Bartow, FL 33830; 863-537-3999; kmathias@citrus.state.fl.us; www.floridajuce.com.

## Expertise, Value Are The Top Reasons Women Choose Hair Salons

The majority of women (70%) prefer to visit locally owned salons for their hair services, according to Market Force Information. Aveda is their top preference among chains, fol-

MOST FREQUENTLY PERFORMED SALON SERVICES



SOURCE: Market Force Information

lowed by Great Clips and Supercuts. However, Great Clips and Supercuts are the salons visited most often in the past six months.

One in three go to the salon every six weeks, and another third visit at least four times a year. The stylist's expertise (64%) is the top reason women select a salon, followed by value (45%), relationship with stylist (42%), location/convenience (30%), products used (14%), and ambiance (10%). One in six paid at least \$25 for their last visit, with 25% paying at least \$75. Two in 10 (20%) also purchased products from the salon.

SOURCE: Market Force Information, Janet Eden-Harris, Chief Marketing Officer, 248 Centennial Pkwy., Louisville, CO 80027; 303-402-6920; www.marketforce.com.

## Walmart Is A Beauty And Personal Care Destination For Most Women

The vast majority of women (89%) shop at Walmart, according to The Benchmarking Company. Among those who do, 88% enjoy the shopping experience at Walmart, and 70% tell others they shop there.

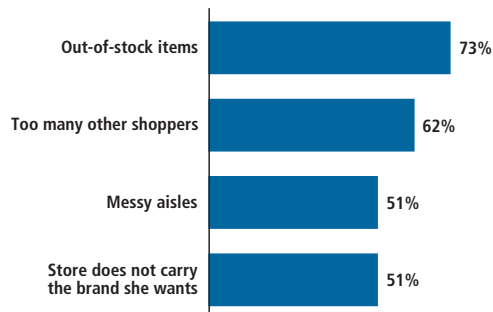
More than seven in 10 women (71%) shop for beauty and personal care products at Walmart. Of women who earn \$100,000 or more per year, 65% say Walmart is their primary source for beauty and personal care products, and 65% of those tell their friends and family that they shop at the store.

Savings is top of mind for women shopping for beauty products at Walmart, with 78% being conscious of their budgets while in the store. Two thirds (65%) say Walmart allows them to get all the beauty products they need for less. Walmart beauty shoppers do not feel they need to compromise on quality to get a deal:

- ▶ 77% say Walmart has premium beauty brands for less;
- ▶ 65% say it offers high-quality beauty products; and
- ▶ 63% say it carries the beauty brands they prefer.

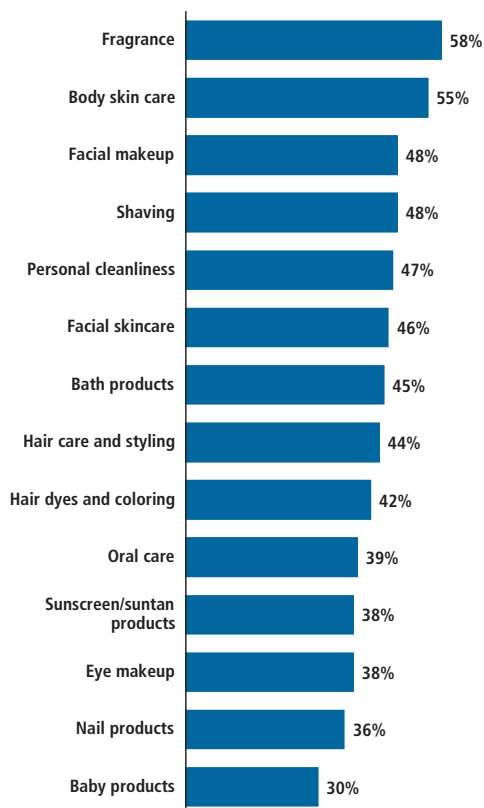
A majority of women (57%) say Walmart is their destination for all their beauty needs. That may be because 72% of women agree that the store offers a wide selection of beau-

FRUSTRATIONS WOMEN SHOPPERS FACE WHEN BUYING BEAUTY AND PERSONAL CARE ITEMS AT WALMART, 2010



SOURCE: The Benchmarking Company

**BEAUTY AND PERSONAL CARE CATEGORIES IN WHICH WOMEN SAY WALMART DOES NOT CARRY THEIR PREFERRED BRANDS, 2010**



SOURCE: The Benchmarking Company

**WHERE WOMEN SHOP FOR BEAUTY AND PERSONAL CARE PRODUCTS, 2010**

Walmart	.71%
Drugstores	.36%
Target	.27%
Grocery stores	.21%
Department stores	.15%
Specialty stores	.13%
Direct salesperson	.13%
Amazon.com	.11%
Kmart	.10%
Online	.9%
Discount department stores	.8%
Salon/spa	.6%
Warehouse stores	.6%
Luxury department stores	.4%
Other	.7%

SOURCE: The Benchmarking Company

ty brands and products. In fact, 42% of women are overwhelmed by the selection.

While women enjoy shopping for beauty and personal care items at Walmart, there are still glitches in the experience. More than half of women (51%) note that Walmart does not carry the brands they want in a variety of beauty

and personal care categories, which opens the door for other retailers to compete with the mass merchandiser.

**SOURCE:** "Women & Walmart: Seeing Through The Eyes Of The Beauty And Personal Care Consumer," The Benchmarking Company, Alisa Marie Beyer, President, 5165 MacArthur Blvd., 2nd Fl., Washington, DC 20016; 202-249-1500; info@benchmarkingco.com; www.benchmarkingco.com. Price: Call for information.

**Hispanic Women Are 'Obsessed' With Beauty; Spend On What Works**

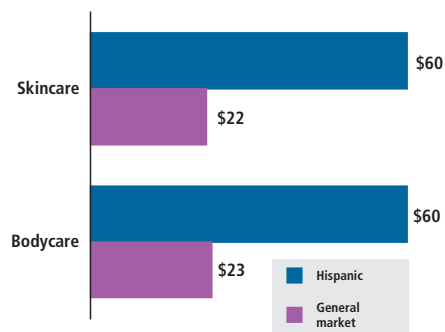
Beauty is of great importance to Hispanic women, according to a panel of beauty experts and focus group research gathered by *Siempre Mujer*, a Hispanic women's magazine. There are 23.6 million Hispanic women in the U.S., with a combined spending power of \$479 billion. And they are willing to invest in beauty — including not only makeup, but also skincare, haircare, and fragrance.

Ruth Gaviria, VP of Hispanic Ventures for *Siempre Mujer* publisher Meredith, notes that some Hispanic women are "obsessed with beauty." Focus group members confirm that they began using makeup at an earlier age than the general population, and it is a lifelong practice. Hispanic women continue to focus on their appearance well after they marry and get older. One focus group member resolutely stated that she will wear lipstick until she dies.

Hispanic women shop the full range of beauty product price points, from CoverGirl to Christian Dior. While they may aim to save on some general purpose products, such as bath soap, they open their wallets for products that serve specific needs, such as reducing hyper pigmentation or controlling frizzy hair. Those products are an investment and worth sacrificing for.

Macy's director of multicultural marketing, Kristyn Page, notes that Hispanic women spend nearly three times the amount general market women do on both skin and body care products each month.

**MONTHLY SPENDING ON SKINCARE AND BODYCARE, HISPANIC VS. GENERAL MARKET WOMEN, 2010**



SOURCE: Macy's

**SOURCES:** Meredith Publishing, Ruth Gaviria, VP151 Hispanic Ventures, 375 Lexington Ave., New York, NY 10017; 212-499-1809; ruth.gaviria@meredith.com; www.meredith.com

Macy's, Kristyn Page, Director Multicultural Marketing, 151 W. 34th St., 17th Fl., New York, NY 10001; 646-429-5200; kristyn.page@macys.com; www.macys.com.

## Hispanic Women: We Want Bilingual Beauty Packaging

Eight in 10 Hispanic women (81%) want personal care products to feature bilingual packaging, according to Mintel. Younger Hispanics are more likely to prefer this type of packaging.

Two in three (64%) would like to see more hair care products created specifically for Hispanics and half would like more general personal care products.

**SOURCE:** Mintel International Group, Leylha Ahuile, Senior Multicultural Analyst, 351 W. Hubbard St., 8th Fl., Chicago, IL 60610; 312-932-0400; lahuile@mintel.com; www.mintel.com.

## Cosmetic Brands Age Down To Appeal To Tweens, Teens

Some 95% of girls aged 15-17 and 88% of girls aged 12-14 wear makeup. Tweens tend to wear brands such as Wet n' Wild and Mary Kay, whereas teens gravitate towards Maybelline, Revlon, and Neutrogena. Beauty brands attribute the increase in young consumers buying their products to the Internet. "They are really savvy, they do their own research and know exactly what brands and products they need," says cosmetic brand Korres' Annia Spahr.

More than half of cosmetic purchases are made at drug stores and an additional third come from Walmart. Those who buy cosmetics at retail have come to expect that all stores — mass, drug, or department — accept returns, says Taylor, adding that it's a notable shift since flexible return policies were previously a key selling only point at higher-end chains such as Sephora and Nordstrom. "It's definitely trickled down, but it's a good thing since it gets women back in the store," says cosmetic brand Smashbox's Lori Taylor.

Cool colors are expected to be popular this fall, says many manufacturers. Many companies are introducing "peacock" shades, such as teal, navy, and gold, in lipsticks, eye shadows, and eye liner.

While the majority of brands aren't age specific, Dermalogica has created its own separate brand, Clean Start, to specifically target tweens and teens. "It's under the same umbrella but it addresses their unique concerns like oily skin and breakouts," says the company's Nathalie Banker. Dermalogica reaches out via social media, the My Beauty mobile bus tour, and via eco-friendly efforts. Consumers, for instance, receive a reusable water bottle with a \$35 purchase. The teen line's intent is to teach teens how to treat their skin, but will hopefully get them to gravitate to other

Dermalogica products — such as anti-aging — when the time comes.

**SOURCES:** Dermalogica, Nathalie Banker, 1535 Beachey Pl., Carson, CA 90746; 310-900-0836; nbanker@dermalogica.com; www.dermalogica.com.

Korres, Annia Spahr, Marketing Coordinator, 584 Broadway, #1008, New York, NY 10012; 212-226-544; annia@korres.com; www.korres.com.

Mintel, Kay Fay, Senior Beauty and Personal Care Analyst, 351 W. Hubbard St., Chicago, IL 60610; 312-932-0400; kfay@mintel.com; www.mintel.com.

Smashbox, Lori Taylor, Pro Artistry Relations, 8538 Warner Dr., Culver City, CA 90232; 310-558-1490, x474; lori@smashbox.com; www.smashbox.com.

## Tween Girl Use Of Beauty Products Rises, Usage Among Teens, Young Adults Drops

Regular use of mascara among tween girls has nearly doubled from 10% in 2007 to 18% in 2010, according to NPD Group. Their use of eye liner also jumped from 9% to 15%. Overall, tween girls use on average 4.5 different beauty products a month.

However, the beauty regimens among teen girls and young women has dropped significantly since 2007. Both groups are less likely to regularly use facial cleanser, acne treatments, mascara, and lip gloss. Foundation is the only beauty product to show no notable change in usage.

**SOURCE:** NPD Group, Karen Grant, Industry Analyst, Beauty Trends, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-0700; karen\_grant@npd.com; www.npd.com.

## 40-Something Women Turn To Anti-Aging Products To Look Younger

Nearly seven in 10 women in their 40s (69%) have used anti-aging skincare or makeup products in the prior year, both to repair their skin and to minimize the signs of aging, according to The Benchmarking Company. They are slightly more interested in minimizing the signs of aging (64%) than protecting against future aging (60%).

Among women who have used anti-aging products:

- ▶ 90% are compelled by the marketing message that a product "firms and tones;"
- ▶ 79% use anti-aging products on both their face and body;
- ▶ 74% have bought at least one new anti-aging product in the prior year;
- ▶ 76% would buy more anti-aging products if they were more affordable;
- ▶ 65% are primarily bothered by the look of lines and wrinkles; and
- ▶ 56% would spend between \$50-\$100 every six months to look 10 years younger.

Despite all their efforts to hide the affects of aging, 72% of women say that some fine lines and wrinkles are acceptable. The greatest challenge facing beauty brands in this mar-



ket is that most women think that anti-aging face washes (69%), day creams (67%), and eye creams (60%) are very similar, regardless of brand.

**SOURCE:** "Anti-Aging Study," The Benchmarking Company, Alisa Marie Bey-er, President, 5165 MacArthur Blvd., 2nd Fl., Washington, DC 20016; 202-249-1500; info@benchmarkingco.com; www.benchmarkingco.com. Price: Call for information.

## factoids

- ▶ The **skin issues** concerning most adults are wrinkles (54%), sagging skin (17%), and age spots (14%). (*The Patient's Guide*; phone: 212-317-1462)
- ▶ Americans most commonly assume people with **red eyes** are tired (71%), but 42% think they look sick, and 38% think they look hungover. (*Visine*; phone: 732-524-3350)
- ▶ Most women (56%) wear cosmetic and makeup products that provide **SPF protection** from the sun. (*Neutrogena*; phone: 310-642-1150)

### REASONS WOMEN DYE THEIR HAIR, 2010

Makes them feel more attractive .....	.72%
Makes them feel more confident .....	.69%
Makes them feel sexier .....	.49%
Makes them look more youthful .....	.42%

**SOURCE:** Procter & Gamble (Wella); phone: 818-999-4512

### FAST FACT:

#### Haircare

- ▶ Emerging majorities spent \$2.7 billion on ethnic haircare products in 2009, a 38% increase over 2005.

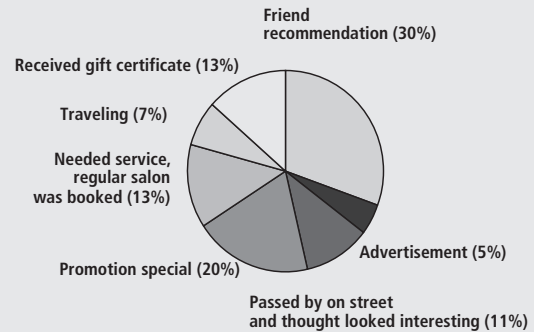
**SOURCE:** Packaged Facts; phone: 240-747-3015.

### FAST FACT:

#### Friends, Promotions Are Top Reasons Why Women Try New Hair Salons

Three in 10 women (30%) are prompted to try a new hair salon based on a friend's recommendation, according to Market Force Information. Promotions and gift certificates also drive them to test out a new salon.

#### REASONS WOMEN TRY A DIFFERENT HAIR SALON



**SOURCE:** Market Force Information

# health & wellness

Most adults have seen a doctor or dentist in the prior year, whereas few saw an eye doctor. Their insurance plans play a part in Americans' likelihood to see doctors. Many Americans would also consider "medical tourism" — going to a foreign country to have a procedure that is not covered by their insurance provider — to save money on treatment.

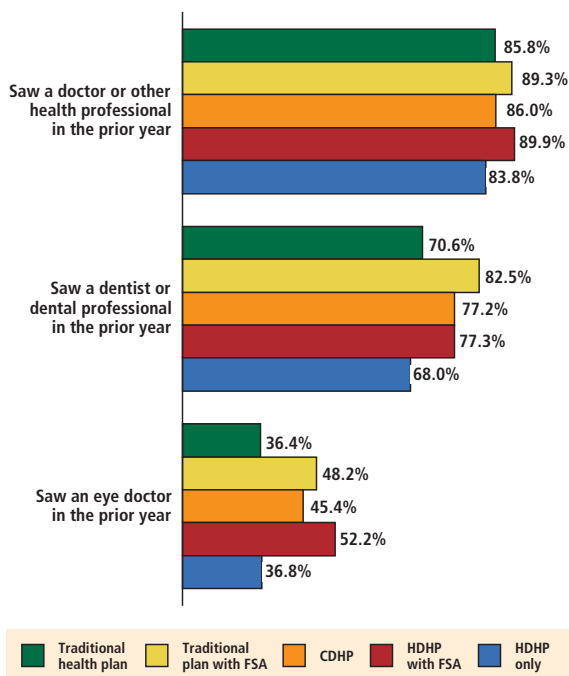
Americans are taking a proactive approach to their health by taking vitamins, quitting smoking, and learning about health risks online and from TV news programs. For non-major health issues, they prefer consulting a website rather than friends or family because they are not comfortable sharing personal health details with others.

The vast majority of adults experience stress related to work or financial issues. They also worry about their health and that of their families. Compared to previous years when the economy was mired in recession, more Americans feel that they are thriving rather than struggling, which suggests they are optimistic about the future. Having money, a life partner, and an extroverted personality all contribute to one's personal sense of happiness.

## Healthcare Plans Influence Visits To Doctors

As of 2008 — the most recent year for which data are available — adults aged 18-64 most commonly had traditional healthcare plans (68%), while 14% had traditional plans with a flexible spending account (FSA) for medical expenses, 12% had a high deductible health plan (HDHP), 5% have a high deductible plan with a health savings account (CDHP), and 2% have a high deductible plan with an FSA, according to the National Center for Health Statistics. Those with a traditional plan only or a high deductible plan only were the least likely to see medical professionals in the prior year.

AMERICANS VISITS TO HEALTHCARE PROFESSIONALS IN THE PRIOR YEAR, BY HEALTHCARE PLAN, 2008



SOURCE: National Center For Health Statistics

SOURCE: "National Health Interview Survey," Centers for Disease Control and Prevention, Stephen Blumberg, Division of Health Interview Statistics, 3311 Toledo Rd., #2112, Hyattsville, MD 20782; 301-458-4107; sblumberg@cdc.gov; www.cdc.gov. Price: Available online at no charge.

## Tough Times Make Resilient Americans

More than half of American adults (53%) were thriving as of January 2010, up from 49% in January 2008, according to the Gallup Poll. Some 44% were struggling, down from 47% over the same period; and 3% were suffering, up from 4%. Overall, Americans are rebounding to pre-recession levels in a variety of areas affecting physical and emotional health:

- ▶ Self evaluation of their emotional health is at an index of 79, about the same as it was in January 2008. More said they had learned or done something interesting in the past day than had two years prior (62% vs. 56%).
- ▶ Their evaluation of their physical health has also remained steady at an index of 77. Fewer report having had a cold in January 2010 (7%) than did in January 2008 (10%).
- ▶ Their health behavior evaluation is also consistent with 2008 (index of 77), though fewer Americans exercised three or more times a week in January 2010 (46%) than did in January 2008 (49%).
- ▶ Americans' evaluation of their work environment fell to 49%, down from 51% in 2008. Despite that, a greater proportion of workers in 2010 (58%) than in 2008 (56%) said their boss treats them more like a partner than an employee.

The states with the highest well-being index scores are Hawaii at 70, and Utah, Montana, Minnesota, and Iowa at 68. The states with the lowest well-being index scores are West Virginia at 61, Kentucky at 62, and Arkansas at 63.

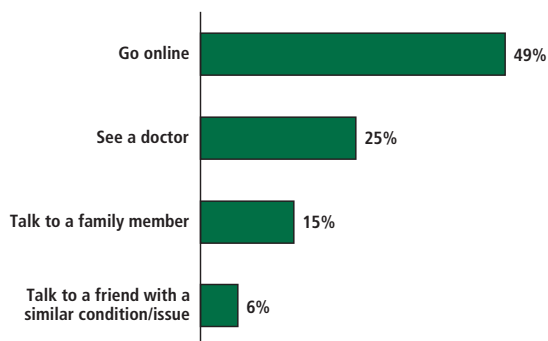
SOURCE: "Gallup-Healthways Well-Being Index," Gallup Poll, Lymari Morales, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.galluppoll.com.

## Online Trumps Mom For Health Advice

Women are nearly twice as likely to turn to a website (62%) as to their mothers (32%) for advice about non-serious health issues, finds iVillage. The vast majority (82%) are uncomfortable discussing health concerns or questions with friends or family members, and 59% say talking about health problems with people they know is embarrassing.

A slight majority of women (53%) have discussed a health question with an online community. Three in 10 (30%) say such support helps them prepare for a doctor's visit.

HOW WOMEN PRIMARILY INVESTIGATE HEALTH QUESTIONS, 2009



SOURCE: iVillage

SOURCE: "Health Survey," iVillage, Jodi Kahn, EVP, 900 Sylvan Ave., Englewood Cliffs, NJ 07632; 212-664-4444; jodi.kahn@nbcuni.com; www.ivillage.com.

## A Pill A Day Keeps Health Bills Away

Two thirds of American adults (66%) are more concerned with their health than they were a year ago, reports Nature Made, a vitamin company. In addition, 67% said that given the state of the economy, it is more important than ever to stay healthy in order to avoid healthcare expenditures.

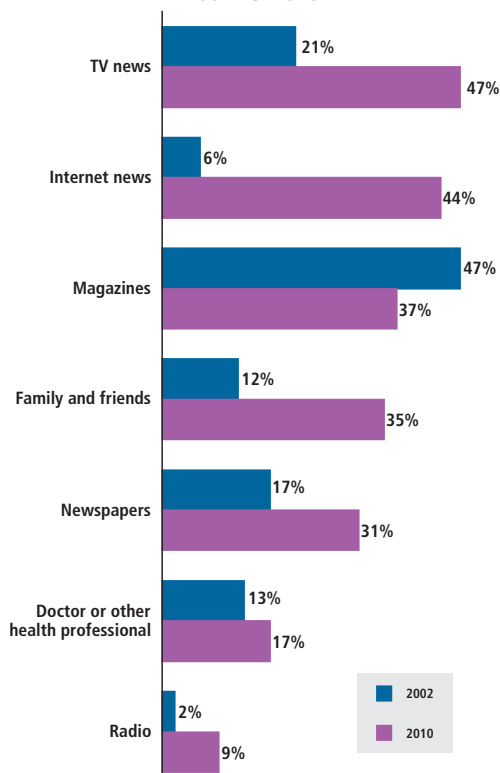
The vast majority (89%) believes that taking vitamins in combination with other healthy lifestyle choices can enhance their health, and 72% believe vitamins can help them avoid health issues. Nearly seven in 10 (68%) say vitamins are worth the cost because they help them stay healthy and avoid healthcare expenses. However, more than a third (37%) are not sure what vitamins they should take for their personal health and diet needs.

**SOURCE:** "Vitamin Survey," Nature Made (Pharmavite), P.O. Box 9606, Mission Hills, CA 91346; 800-423-2405; www.naturemade.com.

## Health Matters To Food Shoppers, But Budget Prevails At The Register

The vast majority of shoppers (86%) are concerned about the nutritional value of the food they consume, according to the United Soybean Board. Despite their concerns, the recession seems to have taken a toll on their willingness to pay more for healthier versions of food items — 53% are willing

SOURCES CONSUMERS TURN TO FOR HEALTH INFORMATION, 2002 VS. 2010



**SOURCE:** United Soybean Board

to spend extra in 2010, down from 60% in 2006. Nearly half of those not willing to spend more for healthier food (46%) say they cannot afford to do so. Some 18% claim the food they buy is already healthy, whereas 13% believe healthier food wouldn't taste as good.

Americans continue to be concerned about obesity, with 28% saying that individuals are responsible and 20% blaming the fast food industry. This represents a significant shift from 2009, when 26% blamed fast food companies and 24% blamed individuals. When it comes to their own diets, 45% of consumers believe that following a moderate-fat diet, choosing "good" fats over "bad" fats is the most effective strategy for maintaining a healthy diet, 11% believe that a low fat diet is the best option, while 35% think that both are equally effective.

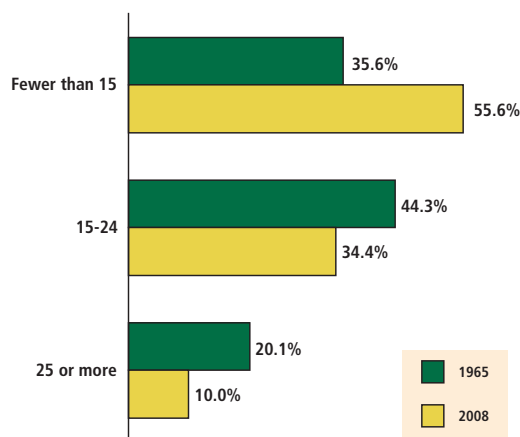
Consumers most commonly get their health news from TV, followed by the Internet, which barely registered as source in 2002.

**SOURCE:** "Consumer Attitudes About Nutrition," United Soybean Board, Lisa Cassidy, 16305 Swingley Ridge Rd., #150, Chesterfield, MO 63017; 800-989-8721; lcassady@unitedsoybean.org; www.soyconnection.com. Price: Available online at no charge.

## Smoking Then And Now: 1965 Vs. 2008

The number of smokers in America has been in steady decline since the 1980s, according to the Centers for Disease Control and Prevention. Some 46.0 million Americans smoked in 2008 (or 20.6% of the population), compared to 50.1 million in 1965 (or 42.4% of the population). The number of cigarettes they smoke per day has fallen to 13.3, down from 18.3 in 1965. That is partly due to the rise of the casual smoker, who does not smoke on a daily basis.

NUMBER OF CIGARETTES AMERICANS SMOKE PER DAY, 1965 VS. 2008



**SOURCE:** Centers For Disease Control And Prevention

**SOURCE:** "National Health Interview Survey," Centers for Disease Control and Prevention, Stephen Blumberg, Division of Health Interview Statistics, 3311 Toledo Rd., #2112, Hyattsville, MD 20782; 301-458-4107; sblumberg@cdc.gov; www.cdc.gov. Price: Available online at no charge.

## Darkness Visible: Adults Afflicted With Depression Find Lives Upended By Illness

Only 27% of adults suffering from depression are very satisfied with their lives, compared to 55% of adults overall. On a scale of 1-10, where 10 is extremely disruptive, they say their symptoms rate a 7.2 in terms of disrupting their feelings and mood, 6.2 in their daily activities, and 6.0 in their thinking and concentration.

Most of those with depression (57%) receive care for their condition from their primary physician, whereas 38% see a mental health professional. Two thirds (67%) receive medication as their main source of treatment. Of those who have used medication, 62% say it has been very helpful. Only 19% have used animal therapy to treat their condition, but most who have (54%) say it has been very helpful.

Overall, only 35% of depression patients are very happy with the overall treatment they are receiving for their condition.

Those with depression are open about their condition with family and medical personnel, but conceal their diagnosis from other acquaintances.

### PEOPLE WITH WHOM ADULTS WITH DEPRESSION ARE OPEN ABOUT THEIR DIAGNOSIS, 2009

Spouse .....	.85%
Mental health professionals .....	.83%
Other health professionals .....	.75%
Co-workers .....	.22%
People at their place of worship .....	.17%
Employers .....	.16%
Neighbors .....	.10%

**SOURCE:** National Alliance On Mental Illness

**SOURCE:** "Depression Survey Initiative," National Alliance On Mental Illness, Christine Armstrong, 3803 N. Fairfax Dr., #100, Arlington, VA 22203; 703-312-7893; christinea@nami.org; www.nami.org. Price: Available online at no charge.

## Americans Consider Med Tourism

Half of Americans are familiar with the term "medical tourism," referring to those who travel to other countries to undergo medical treatment, finds YPartnership. Nearly one in five (17%) would consider visiting another country to receive medical care. The reasons they cite include:

- ▶ Lower cost of care in other countries (84%);
- ▶ Comparable or better quality treatment or care (66%);
- ▶ The procedure they seek is not covered by insurance (43%);
- ▶ Shorter wait time to receive treatment (41%); and
- ▶ Access to non-FDA approved treatments (22%).

**SOURCE:** "2010 Portrait of American Travelers," Ypartnership, Amanda Jackson, 423 S. Keller Rd., #100, Orlando, FL 32810; 407-838-1812; amanda.jackson@ypartnership.com; www.ypartnership.com. Price: \$2,950.

## Older Men Are More Likely To See Doctors

Men aged 60 and older (85%) are more likely than men aged 18-29 (63%) to have seen a primary care physician in the prior year. Older men (88%) are also more likely than their younger counterparts (70%) to say they have a designated primary care physician. Only a third of men aged 18-29 (32%) have had multiple appointments with a physician in the prior year. The most common reasons given by men who had not seen a doctor in the prior two years are that they did not need to and that they did not have health insurance.

A slight majority of men (52%) have had an appointment with a specialist physician in the prior two years, whereas 25% have never had an appointment with a specialist.

**SOURCE:** "2010 Survey," American Osteopathic Association, Nicole Grady, 142 E. Ontario St., Chicago, IL 60611; 312-202-8000; ngracy@osteopathic.org; www.osteopathic.org. Price: Call for information.

## Money (And Love) Bring Happiness

Nearly two thirds of Americans say they are very or somewhat happy, according to Keirse Research. Americans most likely to say they are happy are extroverts with an annual household income of \$75,000 or more (82%). The unemployed (46%) are the least likely to be happy.

Many factors affect happiness:

- ▶ Personality: Extroverts (75%) are more likely to be happy than introverts (56%).
- ▶ Wealth: Those with annual household incomes of \$75,000 or more (72%) are more likely to be happy than those with annual household incomes of \$50,000 or less (59%).
- ▶ Love: Those who are engaged (71%) are more likely to be happy than those who are separated but not divorced (48%).
- ▶ Age: Americans get happier as they get older, though happiness dips at age 35-44 (58%) when family and career pressures are at their highest.
- ▶ Family: Those whose children have left home (73%) are happier than those who do not have children (62%) and those who are divorced and sharing custody (56%).
- ▶ Education: Increased education results in increased happiness, with 68% of those with a bachelor's or graduate degree stating they are happy.

**SOURCE:** Keirse Research, Kip Parent, CEO, PO Box 6279, San Mateo, CA 94403; 650-276-0770; info@keirse.com; www.keirse.com.

## Emergency Room Visitors Want To Be Kept Comfortable And Informed

The average visitor to an emergency room waited four hours, seven minutes, before receiving medical care, according to Press Ganey Associates. Not surprisingly, the shorter the waiting period, the more satisfied the patient. Those who waited for less than two hours ranked their satisfaction as 89 out of 100, where 100 is completely satisfied. Those who waited for six hours or more ranked their satisfaction as 77.

Keeping patients comfortable and informed makes for greater satisfaction scores. Among those who had to wait six hours or more, those who received very poor or poor information about delays ranked their satisfaction at 46 and 61, respectively. Those who received good or very good information about delays ranked their satisfaction at 84 and 97, respectively.

Similarly, patients who waited for six hours or more and who said their comfort level while in the waiting room was very poor or poor ranked their satisfaction at 42 and 56, respectively, whereas those who ranked their comfort level as good or very good ranked their satisfaction at 79 and 94, respectively.

Those who waited for less than an hour had similar ratings based on their comfort level. Those who said their comfort level was very poor ranked their satisfaction at 40, whereas those who said they were very comfortable ranked their satisfaction at 96.

**SOURCE:** "Pulse Report 2010: Emergency Department," Press Ganey Associates, Abby Szklarek, PR Manager, 404 Columbia Pl., South Bend, IN 46601; 574-309-7961; [aszklarek@pressganey.com](mailto:aszklarek@pressganey.com); [www.pressganey.com](http://www.pressganey.com).

## Multicultural Women’s Knowledge Of Heart Disease Improves

Six in 10 White women know that heart disease is the leading cause of death among women, compared to only 44% of Hispanics, 43% of Blacks, and 34% of Asians.

Though low, these numbers represent an improvement in awareness among emerging majority women: awareness doubled among Hispanic women and tripled among Black women between 1997 and 2009. However, Black women (32%) and Hispanic women (31%) are more likely to name breast cancer as women’s primary health concern, as are White women, to a lesser degree (24%).

Few women are aware of the symptoms of a heart attack:

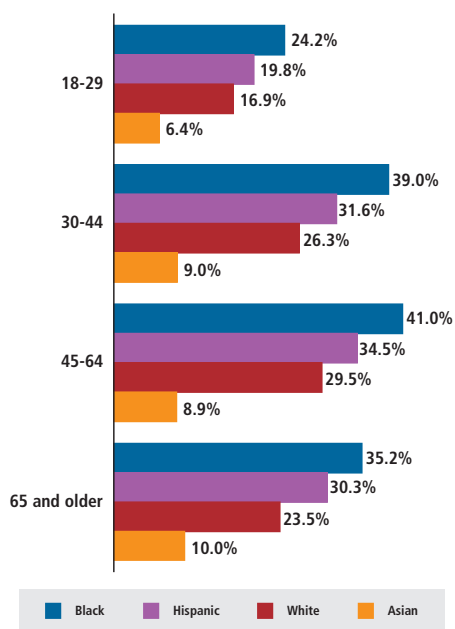
- ▶ Chest pain (cited by 56%);
- ▶ Neck, shoulder, and arm pain (56%);
- ▶ Shortness of breath (27%);
- ▶ Tighness in the chest (17%);
- ▶ Nausea (15%); and
- ▶ Fatigue (7%).

**SOURCE:** “Twelve-Year Follow-Up of American Women’s Awareness of Cardiovascular Disease Risk and Barriers to Heart Health,” by Lori Mosca, *Circulation: Cardiovascular Quality And Outcomes* (a journal of the American Heart Association), 7272 Greenville Avenue, Dallas, TX 72514; circoutcomes.ahajournals.org. Price: Available online at no charge.

## Blacks Of All Ages Are More Likely Than Other Americans To Be Obese

More than a quarter of Americans (26.7%) are obese, according to Gallup. Obesity peaks at age 45-64; 30.8% of

**OBESITY BY AGE AND RACIAL/ETHNIC GROUP, 2010**



**SOURCE:** Gallup Poll

Americans in that age range are obese. Americans aged 18-29 (18.2%) are least likely to be obese.

Blacks are more likely than other Americans of the same age to be obese. Blacks aged 30-64 are significantly more likely than their peers to be obese.

Unlike those of other racial/ethnic groups, obesity in Asians increases with age, with those aged 65 and older the most likely to be obese.

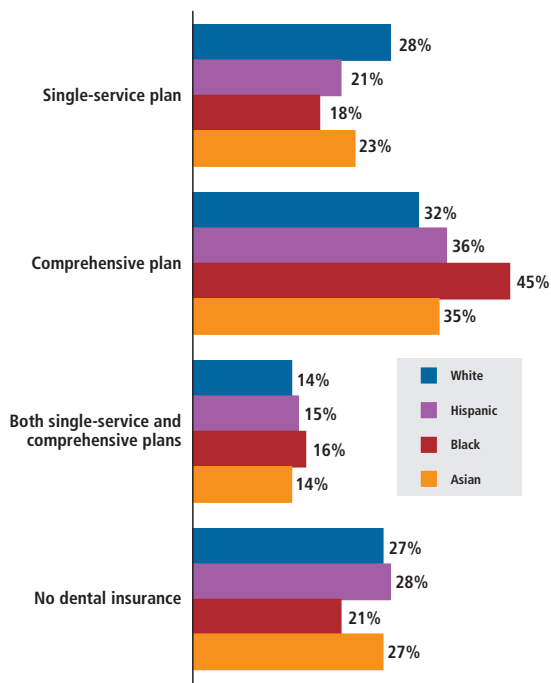
Obesity and health are closely tied to Americans’ estimation of their own wellbeing. This may explain why Blacks rate their wellbeing at 63.5, which is lower than Asians’ (69.9), Whites’ (66.8), and Hispanics’ ratings (64.9).

**SOURCE:** “Obesity Peaks In Middle Age,” Gallup Poll, Elizabeth Mendes, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.gallup-poll.com. Price: Available online at no charge.

## Blacks Lead All Americans In Dental Insurance Coverage

More than a quarter of the 172 million Americans with private health insurance (26%) did not have dental insurance in 2008 — the most recent year for which data are available — according to the Centers for Disease Control and Prevention. A third (33%) have dental coverage through a comprehensive health insurance plan, 26% have coverage through a single-service plan that only covers dental, and 14% have a combination of coverage through both comprehensive and single service plans.

**AMERICANS WITH PRIVATE HEALTH INSURANCE WITH & WITHOUT DENTAL COVERAGE, BY RACE, 2008**



**SOURCE:** Centers for Disease Control and Prevention



Blacks (21%) are less likely than average to be without dental insurance, and more likely to have coverage via a comprehensive plan. Whites are more likely than average to have coverage through a single service plan.

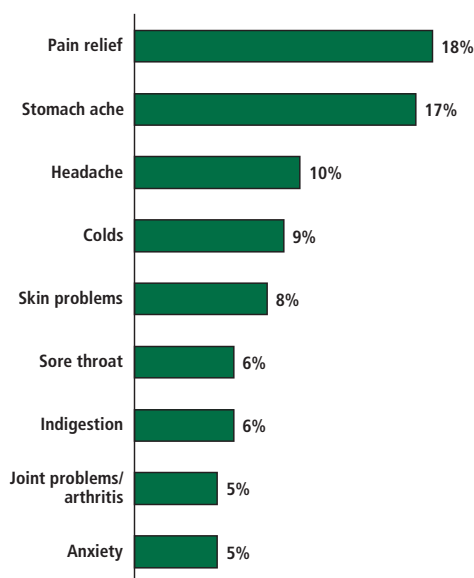
**SOURCE:** "Dental Insurance For Persons Under Age 65 Years With Private Health Insurance," Centers for Disease Control and Prevention, Barbara Bloom, Division of Health Interview Statistics, 3311 Toledo Rd., #2112, Hyattsville, MD 20782; 800-232-4636; bbloom@cdc.gov; www.cdc.gov.

## Herbal Supplements Are A Tradition Among Older Hispanics

More than six in 10 Hispanics aged 45 and older (62%) use herbal remedies or supplements, and 55% intend to bequeath this cultural tradition to their children, according to *AARP Viva*. In fact, 47% of those who use supplements learned about them simply because they are part of their culture, and 40% learned of them from a relative.

More than four in 10 older Hispanics (42%) use supplements at least once a month, with 16% using them daily. However, 70% of those who take supplements do not discuss them with their doctor.

AILMENTS FOR WHICH HISPANICS AGED 45 AND OLDER USE HERBAL SUPPLEMENTS OR REMEDIES, 2010



**SOURCE:** AARP

**SOURCE:** "Usage Of Herbal Supplements And Remedies Among Hispanics Aged 45+," *AARP Viva*, Gretchen Anderson, Research Analyst, 601 E St. NW, Washington, DC 20049; 202-434-6343; www.aarp.org/viva. Price: Available online at no charge.

## Cosmetic Surgery Grows In Popularity Among Emerging Majorities

More than half of emerging majorities (52%) believe that cosmetic surgery has become more popular within their racial/ethnic community in the prior five years, according to the American Academy of Cosmetic Surgery. A quarter (25%) knows someone of the same race/ethnicity who has had plastic surgery. However, few have had a cosmetic surgery procedure themselves, including only:

- ▶ 11% of Asians;
- ▶ 7% of Blacks;
- ▶ 5% of Hispanics; and
- ▶ 6% of American Indians/Alaskan Natives, Hawaiian Natives/Pacific Islanders, and other emerging majorities and multiple race individuals.

Nearly half of those who have had a cosmetic surgery procedure (42%) chose a surgeon who was of their same race/ethnicity, though 43% said it was difficult to find such

### COMMON COSMETIC SURGERY PROCEDURES, BY RACE/ETHNICITY, 2010

#### INVASIVE PROCEDURES

##### ASIANS

- 1) Face lift
- 2) Eyelid surgery
- 3) Ear surgery

##### BLACKS

- 1) Liposuction
- 2) Breast reduction
- 3) Forehead lift

##### HISPANICS

- 1) Abdominoplasty
- 2) Thigh lift
- 3) Breast augmentation

#### NON-INVASIVE PROCEDURES

##### ASIANS

- 1) Fat injections
- 2) Dermabrasion
- 3) Botox

##### BLACKS

- 1) Laser hair removal
- 2) Botox
- 3) Chemical peels

##### HISPANICS

- 1) Botox
- 2) Laser hair removal
- 3) Chemical peels

**SOURCE:** American Academy of Cosmetic Surgery

a surgeon. Asians (61%) are most likely to choose a cosmetic surgeon of the same race, and Blacks (63%) are the most likely to have difficulty finding a surgeon of the same race.

The factors that would affect emerging majorities' choice to have cosmetic surgery are:

- ▶ Cost, most commonly cited by Hispanics;
- ▶ Stigma, most commonly cited by Asians; and
- ▶ Lack of need for surgery, most commonly cited by Blacks.

**SOURCE:** "Public Opinion Survey, Diversity," American Academy of Cosmetic Surgery, Jeff Karzen, Communications, 737 N. Michigan Ave., #2100, Chicago, IL 60611; 312-981-6763; jkarzen@cosmeticsurgery.org; www.cosmeticsurgery.org. Price: Available online at no charge.

## Sleep Tied To Teens' Mental Health

Teens who report that they get “enough sleep” are 65% less likely than sleep-deprived teens to be depressed, according to research published in the journal *Sleep*. On average, teens receive seven hours and 53 minutes of sleep per night. Teens who sleep fewer than five hours a night have a 71% higher risk of depression than those receiving eight hours a night. Moreover, teens who go to sleep after midnight are 20% more likely to be suicidal than teens who head to bed before 10 p.m.

**SOURCE:** Columbia University Medical Center, James Gangwisch, Study Author, 212-543-6552; jeg64@columbia.edu.

## Hispanics To Pass Herbal Remedies Cultural Tradition To Kids

More than half of Hispanics aged 45 and older who use herbal supplements and remedies to treat health issues (55%) plan to pass them on to relatives. Most (58%) will share them with their children. The older they are, the more likely they are to share herbal remedy knowledge; 68% of those aged 60 and older, 58% of 50-59-year-olds and 43% of 45-49-year-olds will do so. Also, those who were born outside the U.S. (62%) are more likely to do so than those born in the U.S. (54%).

**SOURCE:** “Usage Of Herbal Supplements And Remedies Among Hispanics Aged 45+,” AARP Viva, Gretchen Anderson, Research Analyst, 601 E St. NW, Washington, DC 20049; 202-434-6343; www.aarp.org/viva.

## factoids

- ▶ Two thirds of Americans (67%) say taking **vitamins** during the recession is more important to them because they need to stay healthy and avoid incurring healthcare costs, and 72% believe that taking vitamins is key to avoiding health issues. (*Nature Made; phone: 800-276-2878*)
- ▶ More than seven in 10 Americans (71%) believe that society is less judgmental about **cosmetic surgery** than it was five years ago, and 62% say that makes them more comfortable about having a procedure done. (*American Academy of Cosmetic Surgery; phone: 312-981-6763*)
- ▶ The vast majority of people who use **public restrooms** (77%) prefer touchless paper towel dispensers to air hand dryers. (*Georgia-Pacific; phone: 404-652-4704*)
- ▶ Three quarters of dentists (75%) say their patients report an **increase in stress** in their lives, and it's evident in their teeth: 65% also note an increase in cases of teeth grinding and jaw clenching. (*Chicago Dental Society; phone: 312-836-7330*)
- ▶ Americans are split on **healthcare reform**, with 43% in favor of it and 41% opposed, though some provisions are more important to them than others, such as fixing the health insurance system, which 73% are in favor of. (*Henry J. Kaiser Foundation; phone: 650-854-9400*)
- ▶ More than six in 10 women (61%) **feel sluggish** at least once a week, with the majority attributing this to lack of exercise (75%), poor diet (66%), and sitting for long periods of time (61%). (*Kellogg Company; phone: 269-961-3799*)
- ▶ Springtime allergies prevent 45% of **contact lens wearers** from wearing their lenses during the season, and 12% have stopped wearing contacts because of allergy interference. (*Johnson & Johnson; phone: 732-524-3350*)
- ▶ A third of those aged 50 and older say their **doctors** never discuss potential drug interactions when prescribing medication, and 20% have received conflicting information from doctors. (*Campaign for Better Care; phone: 202-371-1999*)
- ▶ More than half of those with **type 2 (or adult-onset) diabetes** (55%) say their hectic schedules get in the way of managing their disease, including 20% who say it is the number one difficulty. (*Abbott; phone: 614-624-7485*)
- ▶ The average American sees 18.7 different **doctors** during the course of their lifetime; among women, the average is 20.6, compared to 16.7 for men. (*Practice Fusion; phone: 516-395-3630*)
- ▶ Although 94% of Americans know that extended exposure to the sun's rays can cause skin damage or skin cancer, only 20% use **sunscreen** daily. (*Neutrogena; phone: 310-309-1012*)
- ▶ More than seven in 10 Americans (72%) believe people look more attractive with a **tan**, and 66% think they look healthier, yet 75% say they would do anything to prevent skin cancer. (*American Academy of Dermatology; phone: 847-240-1730*)
- ▶ Two thirds of Americans (65%) do not believe over-the-counter **store brand medications** are as effective as national brands, and 49% prefer to give their families medications from a recognized brand. (*Synovate; phone: 212-293-6100*)
- ▶ One in five Whites (20%) have been diagnosed with a **sleep disorder**, most commonly insomnia or restless leg syndrome; 19% of Blacks have been diagnosed, most commonly with sleep apnea. (*National Sleep Foundation; phone: 202-347-3471*)
- ▶ A majority of critically ill patients (57%) are brought by ambulance to an emergency room; those with Medicare coverage are three times as likely as those with private insurance to arrive by ambulance. (*American College of Emergency Physicians; phone: 202-728-0610*)
- ▶ Most smokers (54%) would not **quit smoking** if higher taxes were imposed on cigarettes, compared to 16% who would be very likely to quit based on higher taxes. (*Rasmussen Reports; phone: 732-776-9777*)
- ▶ A majority of **prescription medication** users (57%) would be willing to switch to another drug in the same class if their doctor assured them the two are interchangeable. (*National Consumers League; phone: 412-408-3688*)
- ▶ More than 30% of emerging majorities would prefer to go to a **cosmetic surgeon** of their same race/ethnicity, however 57% believe it would be hard to find such a surgeon. (*American Academy of Cosmetic Surgery; phone: 312-981-6763*)
- ▶ Young consumers who have changed their views on **health and wellness** were primarily driven by stress in their lives (51%) and their energy levels (47%). (*Hartman Group; phone: 425-452-0818, x124*)
- ▶ Nearly a third of Americans (30%) have gone on 20 or more **diets** in their lives, trying an average of five different dieting strategies. (*Nutrisystem; phone: 215-706-5392*)
- ▶ The vast majority of parents (86%) say it is a struggle to get their children to take care of their **teeth**. (*Trident/Kraft Foods; phone: 847-646-4583*)
- ▶ Although most parents know doctors can detect a **vision problem** before a child is a year old, only 19% take their children for an eye exam before their first birthday. (*American Optometric Association; phone: 800-365-2219*)
- ▶ **Patients** considering a cosmetic body sculpting treatment — such as liposuction or Zeltiq — are more concerned about results (48%) than cost (21%), safety (11%), length of recovery (10%), or surgery (10%). (*The Patient's Guide; phone: 949-756-2400*)

- ▶ One in five Americans (20.6%) **smoked** in 2009, a proportion essentially unchanged since 2006; in addition, 40% of adults and 54% of children aged 3-11 were exposed to secondhand smoke in 2009. (*Centers for Disease Control and Prevention; phone: 800-232-4636*)
- ▶ Some 50 million Americans suffer from **allergies**, with the most common pet allergy being to cats. (*Waterpik; phone: 970-484-1352*)
- ▶ Nearly two thirds of women (62%) consider it a significant accomplishment to drop a **jean size**, and 79% would reward themselves with a new pair of jeans if they hit a dieting or weight-loss goal. (*SpecialK/Kellogg's; phone: 269-961-3799*)
- ▶ Nearly four in 10 parents who request an optometrist to fit their child for **contact lenses** (39%) do so because their child refuses to wear his or her glasses. (*American Optometric Association; phone: 314-983-4263*)
- ▶ Nearly three quarters of heterosexual adults (63%) believe that both members of same sex couples should receive untaxed **healthcare benefits** from employers. (*Witeck-Combs Communications; phone: 202-887-0500, x14*)
- ▶ More than a quarter of Americans (26%) say they are **germophobic**; women (30%) are more likely than men (21%) to say so, and Millennials (42%) are more likely than Gen Xers (27%) and Boomers (21%) to say so. (*Purell; phone: 917-319-8472*)
- ▶ The vast majority of men aged 60 and older (85%) have visited a **primary care physician** in the prior year, compared to 63% of men aged 18-29 who have done so. (*American Osteopathic Association; phone: 312-593-6897*)
- ▶ The vast majority of workers (86%) have misconceptions about **flexible spending accounts**, and 80% are not sure what expenses qualify for reimbursement though such a plan. (*WageWorks; phone: 888-990-5099*)
- ▶ New York City residents are more likely than Americans overall to walk to manage their **stress levels** (62% vs. 48%). (*American Psychological Association; phone: 202-336-5898*)
- ▶ Nearly three quarters of adults (74%) would choose to have a terminally-ill family member receive **care at home** rather than at a nursing home or other care facility. (*Amedisys; phone: 225-295-9688*)



# homes

Home ownership is still a significant aspect of living the “American Dream,” but Americans are less likely than in previous years to think that a home is a good investment for the future. They may be right — most homes lost value in 2010.

Some Americans are taking advantage of the slumping housing market and seeking a deal on a home purchase. First-time homebuyers accounted for a larger share of home sales than in the past. Most first-time buyers believe that they have prepared for all expenses of home ownership, but about half are surprised by some costs.

Homebuyers are as likely to have found the home they eventually bought online as they are to have found it through a realtor. In fact, they are slightly more likely to use the Internet than a realtor at some point during their search.

The top factors in Americans’ choice of home are that it is in a good neighborhood and close to their workplace.

Many homeowners are choosing to remodel their current homes rather than buy a new home. Adding a bathroom and fixing up a kitchen or bathroom are the most common projects. While most plan to hire a contractor for their remodeling project, two thirds also plan to do some of the work themselves.

Some homeowners have traded the hassles of home ownership for renting. Renters, on the other hand, continue to aspire to owning a home. Most renters who moved in 2010 sought to take advantage of deals during the down market to find an apartment with better amenities or more space.

## Homeowners Are More Realistic About Home Values; First-Time Homebuyers Capitalize On Down Market

Consumers' perceptions of the housing market more closely reflect reality in 2010. Half of homeowners (50%) believe the value of their homes declined in 2009; in fact, 65% of homes lost value, according to Zillow. On the other hand, 20% believed their homes increased in value, when, in actuality, 28% did.

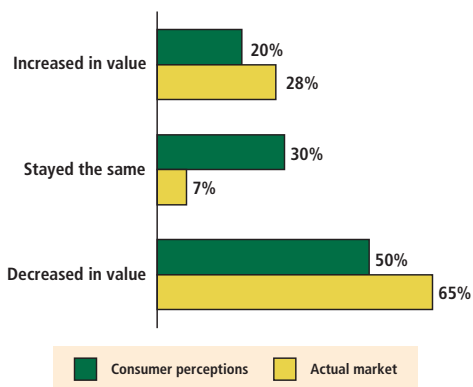
Those in the West (63%) were more likely than average to believe their homes had lost value, though in fact 73% of homes in the West declined in value. Nearly two thirds of homes in the Midwest and South lost value (64% each), though only 49% of Southerners and 46% of Midwesterners believed their homes had lost value. Homeowners in the Northeast were the most realistic — 46% thought their homes had lost value, compared to 49% that did.

However, the perception persists that their home's value will not be affected by the recession. In 2010, 22% of homeowners think that homes in their area will decline in value, but only 14% (or 63% of those who think home values will drop) think their own home will decline in value. In 2009, 47% thought that home values in their area would decline, and 30% thought their own home would be affected — which amounts to 63% of those who thought home values would decline.

Married couples accounted for 60% of homebuyers in 2009, single women 21%, single men 10%, and unmarried couples 8%, according to the National Association of Realtors. The average homebuyer searched for 12 weeks and viewed 12 homes. When they found a home, buyers made an average down payment of 8%. About one in seven (15%) did not put any money down, compared to 23% who put no money down in 2008.

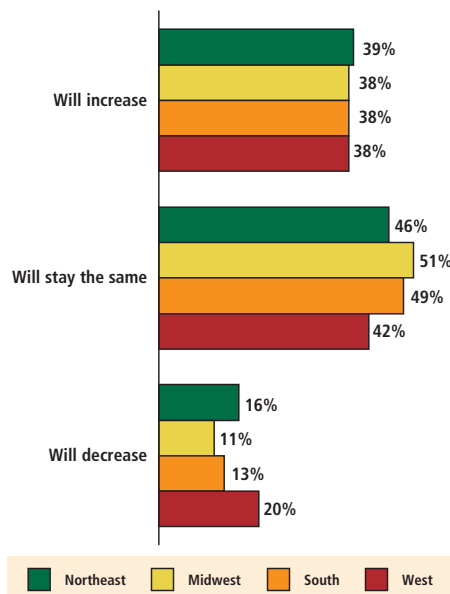
The vast majority of buyers (87%) consider their home a good investment.

CONSUMER'S PERCEPTIONS OF THEIR HOME'S VALUE COMPARED TO ACTUAL MARKET VALUES, 2009



SOURCE: Zillow

HOMEOWNERS' BELIEFS ABOUT HOW THEIR HOME'S VALUE WILL FLUCTUATE IN 2010



SOURCE: Zillow

Homebuyers used a variety of services while searching for their home:

- ▶ 90% searched online;
- ▶ 87% used a real estate agent;
- ▶ 59% looked for yard signs;
- ▶ 49% attended open houses; and
- ▶ 40% looked at print or newspaper ads.

They are equally likely to have first learned about the home they eventually bought from a real estate agent (36%) as from an online source (36%).

When Americans move, they do not move far — the median distance from their old home to the home they purchased is 12 miles. That is likely because transportation costs figure into the decision process of 42% of homebuyers, and commuting distance to work is a factor for 36%.

### First-Time Homebuyers

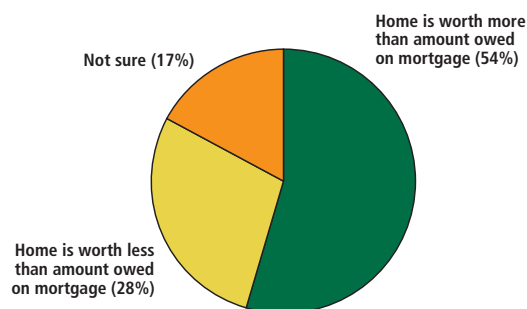
First time homebuyers accounted for 47% of those who bought homes in 2009, the highest proportion on record. The average first-time homebuyer was 30 years old and had a median income of \$61,600. They plan to stay in their homes for an average of 10 years.

The homes they purchased were an average of 1,600 square feet and had an average price tag of \$156,000. A majority (55%) financed their home with a Federal Housing Administration (FHA) loan, and 8% used a Veterans Affairs (VA) loan.

More than six in 10 of those who made a down payment (61%) used their savings, 22% received a gift from a friend or relative, 6% each used a loan from a friend or relative, took money from their retirement savings, and sold stocks or



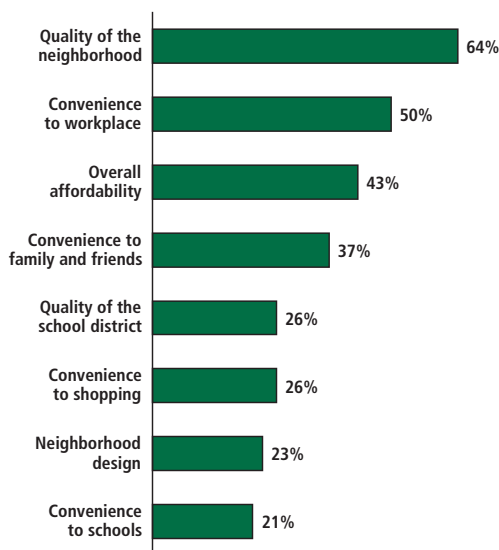
### AMERICANS' HOME VALUE AS IT RELATES TO THE AMOUNT OWNED ON THEIR MORTGAGE, 2010



NOTE: Total does not equal 100% due to rounding.

SOURCE: Rasmussen Reports

### FACTORS INFLUENCING HOMEBUYERS' PURCHASES, 2009



SOURCE: National Association Of Realtors

bonds.

In order to afford their homes, 39% of first time homebuyers cut spending on luxury goods, 38% cut back on entertainment, and 30% cut back on clothes purchases.

### Repeat Homebuyers

By comparison, repeat home buyers:

- ▶ Are older (average age of 48);
- ▶ Have higher incomes (average income of \$88,100);
- ▶ Spend more on their home (average purchase price of \$224,500) and buy bigger homes (average of 2,100 square feet); and
- ▶ Plan to stay in their home longer (average of 12 years).

### Home Sellers

Typical home sellers had lived in their home for seven years, up from six years in 2009. Nearly half chose to buy

larger home (48%), 30% bought a home about the same size, and 22% downsized.

More than four in 10 (42%) offered incentives to attract buyers, such as home warranties or assistance with closing costs.

On average, homes sold for 95% of the asking price.

**SOURCES:** "Q4 Homeowner Confidence Survey," Zillow, Katie Curnutte, 999 Third Ave., #4600, Seattle WA 98104; 206-757-2785; www.zillow.com. Price: Available online at no charge.

"2009 Profile Of Home Buyers And Sellers," National Association Of Realtors, Walter Molony, 500 New Jersey Ave., NW, Washington, DC 20001; 202-383-1177; wmolony@realtors.org; www.realtor.org. Price: Free to NAR members, \$125 for non-members.

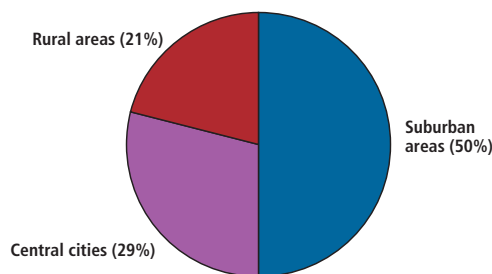
"Homeowner Survey," Rasmussen Reports, Scott Rasmussen, President, 625 Cookman Ave., Asbury Park, NJ 07712; 732-776-9777; info@rasmussenreports.com; www.rasmussenreports.com. Price: Call for information.

## The American Home Got Larger During Economic Boom Times, But Needs A Face-Lift During The Recession

The American population is spread among the 130.1 million homes and housing units across the country, according to the U.S. Census Bureau. Nearly half of Americans' homes were built between 1950 and 1979, with 1974 the median year in which homes were built.

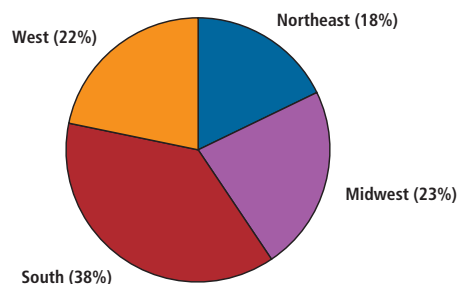
Nearly 8.8 million homes (or 6.7%) are manufactured or mobile homes; 8.7 million (6.7%) are condominiums; and

### TYPE OF COMMUNITY IN WHICH AMERICANS' HOMES ARE LOCATED, 2009

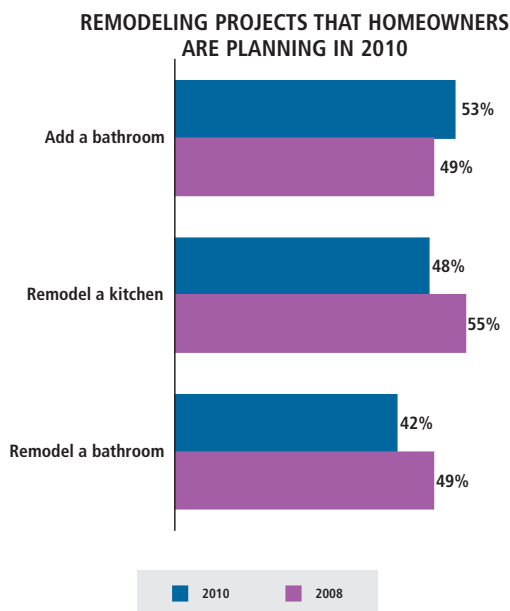


SOURCE: U.S. Census Bureau

### REGION IN WHICH AMERICANS' HOMES ARE LOCATED, 2009



SOURCE: U.S. Census Bureau



NOTE: Of homeowners who are planning a remodeling project in 2010.

SOURCE: RemodelOrMove.com

800,000 (0.6%) are cooperatives. Some 7.8 million (6.0%) are extra residences, with most of those (52%) used as recreational properties.

The median size of American homes is 1,800 square feet. That is the same median size as owner-occupied units (1,800 square feet), whereas renter-occupied units have a median size of 1,300. Among homes constructed in the prior four years, the median size is 2,300 square feet, 28% larger than average. While recently-built homes are larger, they are built on smaller-than-average lots (0.27 acres vs. 0.32 acres on average).

Not surprisingly, owner-occupied homes include more amenities than renter-occupied homes, including:

- ▶ Porch, deck, patio, or balcony (92% of owner-occupied homes vs. 71% of renter-occupied homes);
- ▶ Garage or carport (80% vs. 37%);
- ▶ Separate dining room (57% vs. 28%);
- ▶ Usable fireplace (45% vs. 12%); and
- ▶ Two or more living rooms or recreation rooms (41% vs. 8%).

### Remodeling

The proportion of homeowners who are planning a remodeling project is rebounding in 2010, according to the National Association of Home Builders. Its Remodeling Market Index, which had dipped to a low of 22.1 in the fourth quarter of 2008, has risen to 40.7 in the second quarter of 2010. The index measures demand for residential remodeling projects, and a number below 50 indicates that more remodeling contractors believe that demand is declining than believe it is increasing.

The index corroborates RemodelOrMove.com's findings

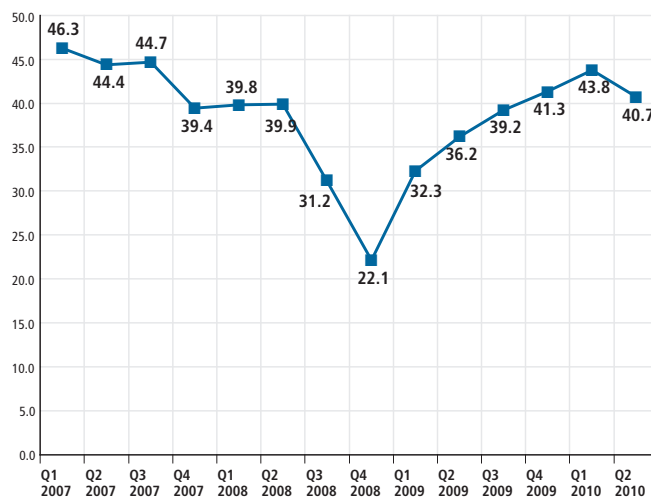
of a 13% increase in homeowners who are planning a remodeling project in 2010. That is on the heels of a 5% increase in 2009. In addition, 54% of those planning a remodeling project are excited about doing it, up from 48% in 2008. Adding a bathroom has supplanted remodeling a kitchen or bathroom as the most popular project in 2010 (see chart).

The proportion of homeowners who plan to hire a general contractor has remained relatively steady, with 64% planning to do so in 2010, down from 66% in 2008. Two thirds (66%) plan to do some of the work themselves, compared to 67% in 2009. Although the cost to remodel is down as much as 20% compared to 2006, an increasing number of those planning to remodel are planning to seek out cheaper materials for their projects; at the same time, the number reporting they will use "luxury" materials is on the decline.

When shopping at big box retailers, homeowners perceive Home Depot as better for "professional" products (such as paint, building materials, and power tools), whereas they perceive Lowe's as better for decorative categories (such as appliances, lighting, landscape, and hard flooring and carpeting), according to Kantar Retail. Although it is a low proportion of shoppers who visit home improvement stores for project ideas, their perceptions of the stores may explain why twice as many Lowe's shoppers (4%) as Home Depot shoppers (2%) came to the store to get ideas for an upcoming project.

Lowe's shoppers (35%) are also more likely than Home Depot shoppers (30%) to visit the store to buy products for a home improvement project. By comparison, Home Depot shoppers (32%) are more likely than Lowe's (27%) to visit the store to buy home maintenance products.

### HOME REMODEL MARKET INDEX, BY QUARTER, 2007-2010



NOTE: An index of below 50 indicates that more remodeling contractors believe that demand for remodelers is decreasing than believe it is increasing.

SOURCE: National Association of Home Builders

**SOURCES:** "2009 American Housing Survey," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

"Remodeling Market Index," National Association of Home Builders, David Crowe, Chief Economist, 1201 15th St., NW, Washington, DC 20005; 202-266-8200; www.nahb.org/rmi/. Price: Available online at no charge.

"U.S. Remodeling Sentiment Report," RemodelOrMove.com, Dan Fritschen, Principle Researcher, 1030 E. El Camino Real, #150, Sunnyvale, CA 94087; info@remodelormove.com; www.remodelormove.com. Price: Available upon request at no charge.

"Home Improvement Series," Kantar Retail, Katherine Clarke, VP Marketing, Two Easton Oval, #500, Columbus, OH 43219; 614-355-4009; katherine.clarke@kantarretail.com; www.kantarretail.com. Price: Call for information

## Brick Reigns Supreme In South & Midwest

Nine in 10 homeowners (90%) find brick an appealing home exterior, finds Boral Bricks. They most appreciate brick's appearance (71%) and low maintenance requirements (68%).

Homeowners in the Midwest and South are more likely than those in the West or Northeast to find brick appealing. Midwestern homeowners particularly like brick's positive

affect on resale value, perhaps because of the dismal housing market in that region during the recession.

**SOURCE:** "Appealing Aspects Of Brick," Boral Bricks, Brian Remsberg (IMRE), 78 Fernwood Ln., Greenville, SC 29607; 864-232-6380; brianr@imre.com; www.boralbricks.com.

## The Typical American Home In 2009

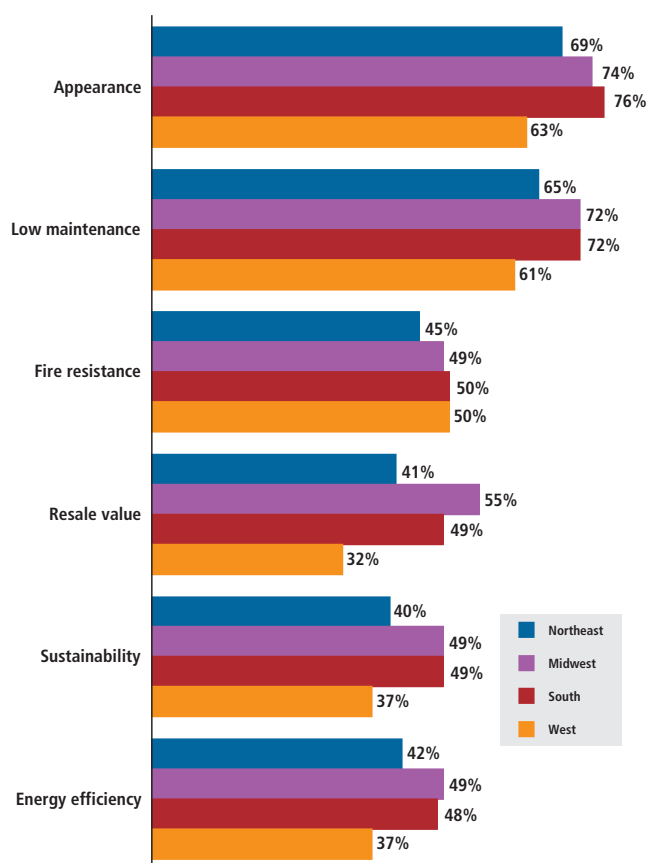
Homeowners' median monthly cost for housing was \$1,000 in 2009, accounting for 20% of their annual household income, according to the U.S. Census Bureau. The median purchase price for a home was \$107,500. For a newly-constructed home, it was \$240,000.

A third of homeowners (32%) own their homes outright, while 66% have a regular or home equity mortgage, and 2% had only a line-of-credit.

Nearly half of homes in 2009 (48%) had a separate dining room, and 30% had two or more living rooms or recreation rooms. More than a third (35%) had a working fireplace. The majority (64%) had three or more bedrooms; among newly-constructed homes, that proportion jumps to 80%. Slightly more than half (51%) had two or more bathrooms; as did 89% of newly-constructed homes. Only 10% of homes and 15% of newly-constructed homes had secured entrances.

**SOURCE:** "2009 American Housing Survey," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov.

ASPECTS OF BRICK HOME EXTERIOR HOMEOWNERS FIND APPEALING, BY REGION, 2010



**SOURCE:** Boral Bricks

## Americans Are Optimistic Housing Market Will Recover... Eventually

A slight majority of Americans (55%) believe that buying a home is the best investment a family can make, down from 67% in May 2009 and 79% in June 2008, according to Rasmussen Reports.

Only 13% say that it is a good time to sell a home in the area where they live, the lowest proportion since May 2009. Most Americans (63%) believe the housing market will improve only when the economy itself improves. Nearly two thirds (65%) think it will take three years for the housing market to recover.

In a year, homeowners believe their home will:

- ▶ Increase in value (19%);
- ▶ Maintain its value (59%);
- ▶ Decrease in value (20%).

In five years, they believe their home will:

- ▶ Increase in value (53%);
- ▶ Maintain its value (30%);
- ▶ Decrease in value (12%).

**SOURCE:** "Housing Survey," Rasmussen Reports, Scott Rasmussen, President, 625 Cookman Ave., Asbury Park, NJ 07712; 732-776-9777; info@rasmussenreports.com; www.rasmussenreports.com. Price: Toplines available online at no charge, detailed findings available for a fee.

## First-Time Home Buyers Are Unprepared

While 88% of first-time home buyers believe they have accounted for all expenses in buying a home, slightly more than half of those who bought within the prior year (51%) say the costs were more than they expected.

Seven in 10 first-time home buyers say the surprise expenses leveled out over time. However, 87% had to change their lifestyle in order to cover the costs. Of those who encountered unexpected expenses, a third paid for them at least partially on credit.

Nearly a third of first-time home buyers are anxious about being able to afford a home. The vast majority (92%) would feel more comfortable if they were given additional time before their first payment was due. Some seven in 10 (70%) say the first-time home buyers tax credit did not factor into their decision about when to buy a home.

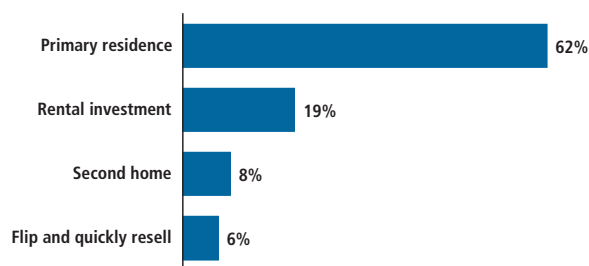
**SOURCE:** "First Time Home Buyers Online Survey," BBVA Compass, Ed Bilek, Communications, 15 S. 20th St., Birmingham, AL 35233; 205-297-3331; ed.bilek@bbvacompass.com; www.bbvacompass.com.

## Who Buys Foreclosed Homes?

Sales of foreclosed homes accounted for 30% of all home sales in the first quarter of 2010, according to Trulia. Nearly half of adults (45%) would consider buying a foreclosed home, down from 55% in 2009. Most (78%) would be concerned about negative aspects of purchasing a foreclosed home, including hidden costs of the purchase (68%) and that the home would lose value (35%).

Renters (57%) are more likely than homeowners (40%) to consider a foreclosed home. Age is a factor in Americans' interest in foreclosed homes. Among renters, 65% of 18-34 year olds would consider such a purchase, compared to 63% of 35-44 year olds, 54% of 45-54 year olds, and 31% of those aged 55 and older.

HOW AMERICANS WOULD USE A FORECLOSED-UPON HOME THEY PURCHASE, 2010



**SOURCE:** Trulia.com

**SOURCE:** "Foreclosed Property Survey," Trulia, Ken Shuman 208 Utah St., #310, San Francisco, CA 94103; 415-517-7211; kshuman@trulia.com; www.trulia.com.

## Homeowners Are Selling Out And Opting To Rent Apartments

Due to the recession, some homeowners are giving up their houses in favor of renting apartments, according to Apartments.com. The majority of those who are doing so (65%) believe owning a home is more expensive than renting an apartment. However, 81% of homeowners who are choosing to rent still believe that owning a home is a good investment. Among those who do not, they cite the following reasons:

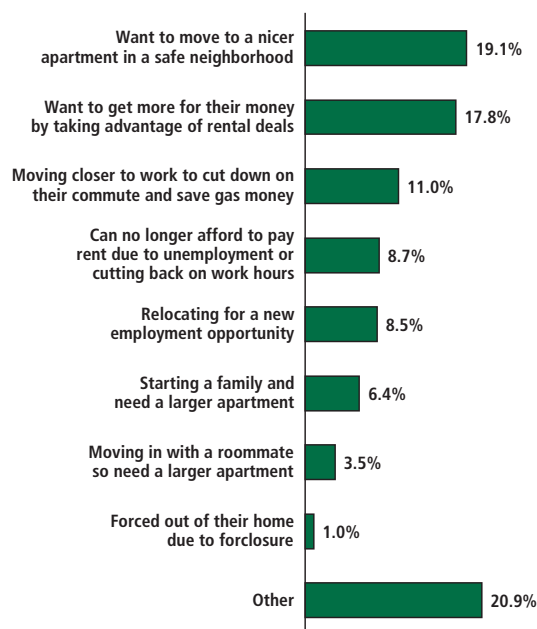
- ▶ High cost of maintenance (34%);
- ▶ Fluctuation in home prices (20%);
- ▶ Selling is difficult in the first few years (14%);
- ▶ Have less money for other investments (13%); and
- ▶ Monthly payments tie up their finances (8%).

Of those looking to rent, only 56% prefer to rent; the others most likely feel forced to do so because of the economy or a change in their familial situation.

Homeowners who are electing to rent most commonly live alone (35%). Nearly a quarter (23%) live with a spouse, and 19% live with a spouse and children. About one in eight (13%) are a single parent. Far fewer live with their extended family (3%) or with a roommate (3%).

Those who choose to rent (rather than feel forced to), say it is "extremely important" that renting offers them a maintenance free lifestyle with convenient access to amenities (62%), that they can afford a better location or neighborhood than if they were to buy a home (45%), and that they have the flexibility to move if they need to (43%).

PRIMARY REASON RENTERS PLAN TO MOVE TO A NEW APARTMENT IN 2010



**SOURCE:** Apartments.com

**SOURCE:** "What Renters Want: Homeowners Survey," Apartments.com, Tammy Kotula, Communications, 175 W. Jackson Blvd., #800, Chicago, IL 60604; 312-601-5305; tkotula@apartments.com; www.apartments.com. Price: Available upon request at no charge.

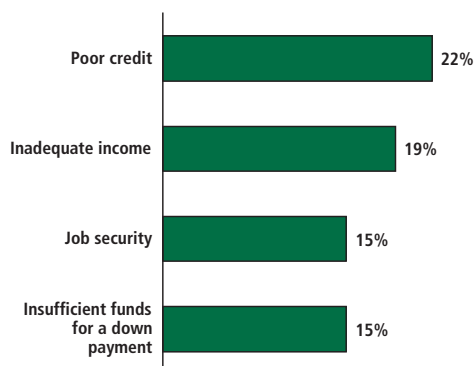
## Renters Hope To Buy... Sometime In The Future

Non-financial concerns such as increased safety (43%) and better school districts (33%) are more likely than financial issues to factor into Americans' decisions to purchase a home, finds Fannie Mae.

Although 79% of renters believe renting has been positive for their families, 67% of renters plan to buy a home at some point in the future. Two thirds of adults overall (65%) prefer owning to renting.

Some 23% of renters expect they will end up purchasing a home later than they had originally planned — likely the result of the recession. Six in 10 adults (60%) believe that buying a home is harder for them than it was for their parents, and 68% think it will be even harder for their children.

GREATEST OBSTACLES TO GETTING A HOME LOAN, 2010



**SOURCE:** Fannie Mae

**SOURCE:** "National Housing Survey," Fannie Mae, Brian Faith, 3900 Wisconsin Avenue, N.W., Washington, D.C. 20016, 202-752-6720; www.fanniemae.com.

## Renters Look To Take Advantage Of Deals When They Move In 2010

Two thirds of apartment renters who are planning to move in 2009 (66%) are doing so out of choice rather than necessity, according to Apartments.com. A greater proportion of those who are moving plan to find an apartment with a lower monthly rental rate (39%) than with a higher rate (34%).

Most (79%) plan to move within the same city, whereas 10% plan to move to a different state nearby, 7% will move across the country, and 1% will leave the country.

The recession is a factor in many renters' choices to

move. Fewer than 10% plan to move because they are unemployed or working less and can no longer afford their current apartment, and a small proportion are moving into an apartment because they have been forced out of their home due to foreclosure. A substantial number are moving in order to take advantage of deals rental agents are offering to get a nicer space for their money.

**SOURCE:** "What Renters Want — 2010 Moving Survey," Apartments.com, Tammy Kotula, 175 W. Jackson Blvd., #800, Chicago, IL 60604; 312-601-5305; tkotula@apartments.com; www.apartments.com. Price: Available upon request at no charge.

## Few Renters Are Covered By Insurance

Only a third of apartment renters (33%) have insurance, including 20% who say it is mandatory at their rental community, according to Apartments.com. Renters are 50 times more likely to be the victims of theft than homeowners, according to Department of Justice statistics cited by Apartments.com. Renters most commonly choose to get insurance out of concern for:

- ▶ Theft (79%);
- ▶ Fire/lightening (71%);
- ▶ Water damage (52%);
- ▶ Extreme weather, such as hail or windstorm (41%); and
- ▶ Smoke damage (41%).

**SOURCE:** "What Renters Want: Insurance," Apartments.com, Tammy Kotula, Communications, 175 W. Jackson Blvd., #800, Chicago, IL 60604; 312-601-5305; tkotula@apartments.com; www.apartments.com.

## factoids

- ▶ Women (72%) most commonly turn to family members for advice on **cleaning techniques**, followed by friends (53%), the Web (41%), and coworkers (29%). (*SC Johnson*; phone: 262-260-2440)
- ▶ Most American homeowners (54%) are “excited about **remodeling**” their homes in 2010, with 48% planning to remodel their kitchen and 42% planning to remodel a bathroom. (*RemodelorMove.com*; phone: 888-825-4169)
- ▶ Nearly six in 10 Americans (59%) are willing to spend more money on energy-efficient household **appliances** in order to save money in the long run. (*Whirlpool*; phone: 269-923-7405)
- ▶ Only 8% of people always read the product labels on **cleaning products** to make sure they’re using them correctly and are aware of any harmful chemicals. (*Soap and Detergent Association*; phone: 202-662-2517)
- ▶ One in 12 households that plan to buy **furniture** within a year shop IKEA (8.5%), making it their most common destination. (*The Media Audit*; phone: 713-626-0333)
- ▶ Nearly two thirds of Americans (64%) think that it is a good time to **buy a home**, but 23% of renters say it will take them longer than planned to purchase a home because of the recession. (*Fannie Mae*; phone: 202-752-6720)
- ▶ The most dreaded **cleaning chore** in American households is tackling a dirty bathroom (55%), followed by scrubbing difficult surfaces (37%). (*Jelmar*; phone: 847-675-8400)
- ▶ More than seven in 10 residents of communities and condos with **homeowners associations** (71%) believe the association rules protect and enhance the value of their properties. (*Community Associations Institute*; phone: 703-797-6261)
- ▶ Nine in 10 homeowners (90%) find **brick** appealing, primarily because of its appearance (71%) and low maintenance (68%). (*IMRE for Boral Bricks*; phone: 864-232-6380)

### FAST FACTS:

#### Homes

- ▶ Americans have lived in their current homes for a median of nine years.
- ▶ 88% of Americans live in a single-family home, 5% in a townhouse or duplex, and 8% in a condo, apartment, or co-op.

**SOURCE:** National Association of Home Builders; 800-368-5242; www.nahb.org.

- ▶ More than three quarters of adults (76%) think there are **benefits to renting** over owning a home, considering the state of the economy in 2010. (*National Apartment Association*; phone: 703-518-6141)
- ▶ The average size of an **American home** was 2,422 square feet in 2009, down slightly from 2,473 in 2008, but still considerably larger than the 1980 average of about 1,700 square feet. (*U.S. Census Bureau*; phone: 301-763-3030)

#### CHANGES AMERICANS HAVE MADE IN HOUSEHOLD CLEANING CHORES IN THE PRIOR YEAR, 2010

Washing laundry in cold water more frequently	58%
Switching to multi-purpose cleaning products	41%
Using refillable cleaning products	38%
Buying a high-efficiency or energy-efficient washer or dryer	36%
Doing laundry less frequently	29%
Making their own cleaning products	12%

**SOURCE:** Soap And Detergent Association; phone: 202-662-2517

- ▶ A majority of **home redecorating** do-it-yourselfers (52%) worry that they will not like the results of their efforts when the room is done. (*Masterchem*; phone: 800-325-3552)
- ▶ Nine in 10 adults (90%) say that the **paint color** in a room affects the mood of their household; 45% believe that a fresh coat of paint can provide the greatest rejuvenation to a room. (*Masterchem*; phone: 800-325-3552)
- ▶ Nearly six in 10 those in the midst of a **home improvement project** (59%) considered using “green” technologies; only 19% are motivated to use eco-friendly options to take advantage of tax credits. (*ServiceMagic*; phone: 303-963-8173)
- ▶ Some 43% of Americans would **move** to a different community if it offered a better quality of life than their current location. (*Ipsos*; phone: 612-205-4733)
- ▶ Nine in 10 homeowners (90%) find **brick** appealing, primarily because of its appearance (71%) and low maintenance (68%). (*IMRE for Boral Bricks*; phone: 864-232-6380)
- ▶ **Spring cleaning** is a ritual for 58% of women, 25% of whom do it to get organized each year, and 25% of who do it to maintain a healthy home. (*ShopSmart*; phone: 914-378-2561)
- ▶ Some 54% of Americans only **clean** the areas of their home that are visible, skipping hard-to-reach places, even though 74% feel their home is not truly clean unless hard-to-reach places are tended to. (*LG Electronics*; phone: 201-816-2011)
- ▶ A third of Americans (33%) have lied to friends and family to avoid having them as **houseguests**, and 45% say that holidays are less stressful when they do not have friends and family stay over. (*Choice Hotels*; phone: 301-628-4361)

- Nearly half of families who recently **moved** (44%) did so because of financial factors, including 4% who were able to purchase a home because of declining home prices. (*Relocation.com*; phone: 800-525-0134)
- Only a third of apartment dwellers (33%) have **renters insurance**; those who do pay an average of \$12.50 a month. (*Apartments.com*; phone: 312-601-5249)
- Nearly half of renters in Chicago (47%) would be more likely to rent an apartment in a **smoke-free building** than one that allows smoking, and 32% would pay more for such an apartment. (*Chicago Tobacco Prevention Project*; phone: 312-628-0214)





# human behavior

Americans gained a bit of free time in 2009 because a larger proportion was out of work than in 2008. They used their extra time to sleep longer and watch more TV than in previous years. Aside from sleeping and working, watching TV continues to account for the largest share of Americans' day.

Fewer than half of Americans get a good night's sleep every night. About a third say their sleep is disturbed because they are stressed, most commonly about financial or work issues.

Most Americans describe themselves as being spiritual or religious, though fewer than half attend services on a weekly basis. Among those who do attend services, half have gone to more than one house of worship, and some attend services of a different faith than their own.

## Americans Devote Their Time To Work, Sleep, And TV Viewing

Americans aged 15 and older spent less time working in a typical day in 2009 than they did in 2007, but they spent more time watching TV and sleeping, according to the U.S. Bureau of Labor Statistics. The researchers suggest the shift is driven by unemployment, and that the unemployed may not be spending their free time as productively as possible. There was little difference between 2007 and 2009 in the time Americans devoted to other activities, such as household chores, shopping, eating, and making calls and reading email.

The data reveals that some of the stereotypes about how men and women spend their time are accurate. Women spent a significantly greater amount of time than men doing housework, taking care of their children, and talking on the phone. Men spent more time than women working, participating in sports, watching TV, and doing lawn care chores.

The data confirm additional stereotypes about parents. As would be expected, those with children younger than age 6 spent the most time in a typical day taking care of household members, including children (2 hours, 8 minutes), compared to those with children aged 6-17 (51 minutes) and adults without children (3 minutes). Parents of young children also got the least amount of sleep (8 hours, 30 minutes),

compared to 8 hours, 41 minutes, for adults without children. Counterintuitively, parents spent more time working and doing work related activities (4 hours, 2 minutes, for parents of young children and 4 hours, 20 minutes, for parents of older children) than did non-parents (3 hours, 27 minutes).

Adults without children filled the time they would have devoted to a family with leisure activities, particularly TV. They watched an average of 3 hours, 11 minutes, in a typical day, compared to 2 hours, 16 minutes, for parents with young children and 2 hours, 22 minutes for parents with older children.

**SOURCE:** "American Time Use Survey," U.S. Bureau of Labor Statistics, 2 Massachusetts Ave. NE, #4675, Washington, DC 20212; 212-691-6339; atusin-fo@bls.gov; www.bls.gov/tus. Price: Available online at no charge.

## Racial/Ethnic Differences Affect How Americans Spent Their Time In 2009

The largest portion of an American's day is spent on sleeping and personal care, according to the U.S. Bureau of Labor Statistics. In a typical day in 2009, Hispanics spent an average of 9 hours, 43 minutes, sleeping and tending to personal care, and Blacks spent an average of 9 hours, 55 minutes on those activities. This compares to the general population, which spent 9 hours, 27 minutes sleeping and on personal care.

Hispanics spent the least amount of time at leisure and sports, which includes TV viewing (an average of 4 hours, 42 minutes), whereas Blacks spent the most time in this cate-

**HOW AMERICANS SPEND A TYPICAL DAY, MEN VS. WOMEN, 2009**  
(In hours:minutes)

	MEN	WOMEN
Sleeping and personal care	9:15	9:38
Eating and drinking	1:16	1:11
Household activities		
Housework	:16	:55
Cooking and clean up	:17	:46
Lawn and garden care	:17	:7
Buying consumer goods and services	:38	:53
Taking care of household members, including children	:22	:42
Taking care of non-household members	:11	:13
Working and work-related activities	4:16	2:51
Education (attending classes, homework, and research)	:26	:30
Organizational, civic, and religious activities	:19	:22
Leisure and sports		
Socializing and communicating	:38	:44
Watching TV	3:06	2:34
Participating in sports, exercise and recreation	:25	:13
Telephone calls, mail, and email	:8	:15

NOTE: Time spent is an average of all Americans, whether they participate in the activity or not.

**SOURCE:** U.S. Bureau of Labor Statistics

**HOW AMERICANS SPENT THEIR LEISURE TIME, PER DAY, BY RACE/ETHNICITY, 2009**  
(In hours:minutes)

	BLACK	HISPANIC	WHITE
<b>WEEKDAYS</b>			
Watching TV	3:29	2:31	2:31
Socializing/communicating	:37	:32	:31
Reading	:08	:08	:22
Playing computer games or computer use for leisure	:39	:11	:20
Participating in sports, exercise, and recreation	:17	:14	:17
Other activities	:19	:19	:21
<b>TOTAL</b>	<b>5:37</b>	<b>4:08</b>	<b>4:37</b>
<b>WEEKEND DAYS</b>			
Watching TV	4:08	3:11	3:14
Socializing/communicating	1:02	1:23	1:08
Reading	:08	:06	:25
Playing computer games or computer use for leisure	:23	:15	:27
Participating in sports, exercise, and recreation	:11	:17	:22
Other activities	:37	:37	:41
<b>TOTAL</b>	<b>6:55</b>	<b>6:02</b>	<b>6:31</b>

**SOURCE:** U.S. Bureau Of Labor Statistics

gory (5 hours, 59 minutes). Conversely, Blacks spent the least amount of time working (3 hours, 11 minutes), and Hispanics spent the most (3 hours, 35 minutes). [Note: Averages include those who are not in the workforce and the unemployed.]

Hispanics devoted slightly less time than the population overall to eating and drinking (1 hour, 10 minutes vs. 1 hour 13 minutes), and Blacks spent less than an hour (55 minutes).

Hispanics spent significantly more time than the average American caring for children and other household members (44 minutes vs. 32 minutes). This is primarily due to their larger, younger families, which means they must devote more time to child care. But they also are more likely than other racial/ethnic groups to live with aging family members who may also need care.

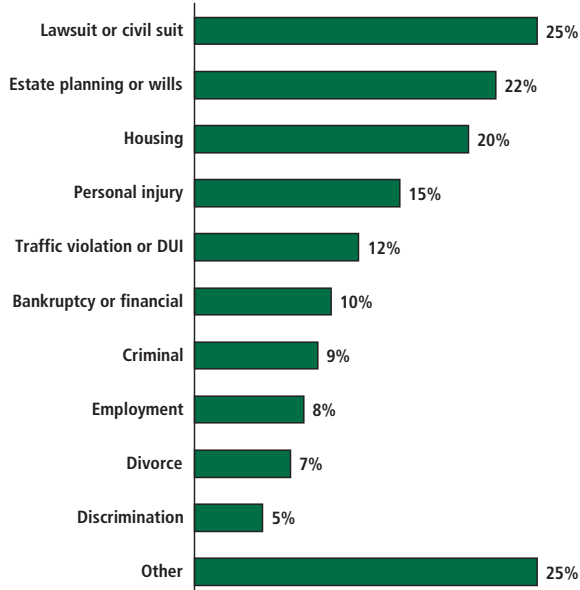
Blacks spent significantly more time than the average American on organizational, civic, and religious activities (28 minutes vs. 20 minutes). This is primarily due to their higher-than-average involvement in their religious communities.

**SOURCE:** "American Time Use Survey," U.S. Bureau of Labor Statistics, 2 Massachusetts Ave. NE, #4675, Washington, DC 20212; 212-691-6339; atusin@bls.gov; www.bls.gov/tus. Price: Available online at no charge.

## Americans Have Their Day In Court

Nearly a quarter of Americans (22%) faced legal issues that potentially warranted hiring an attorney during the prior year, according to FindLaw.com. About one in 10 (12%) hired a lawyer, 11% could have hired a lawyer but chose not to, and 5% chose to represent themselves in court.

LEGAL ISSUES AMERICANS FACED IN THE PRIOR YEAR, 2010



**SOURCE:** FindLaw.com

**SOURCE:** "Legal Issues," FindLaw.com, Michelle Croteau, Communications, 610 Opperman Dr., Eagan, MN 55123; 800-455-4565; michelle.croteau@thomsonreuters.com; www.findlaw.com.

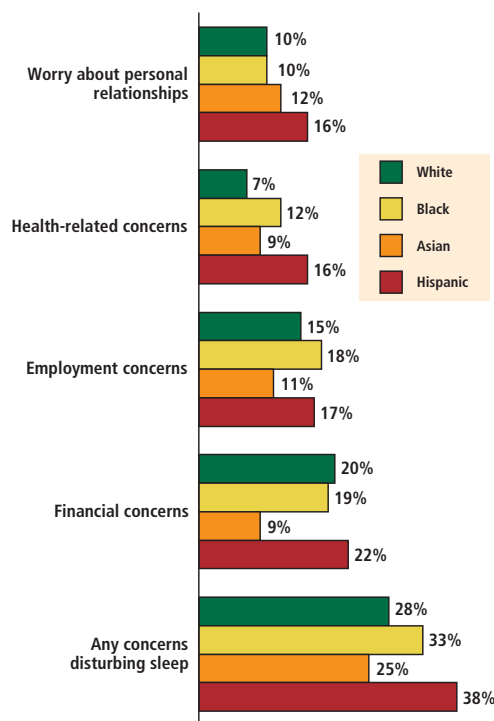
## Good Night, America: Asians Sleep Well, Hispanics Wake Up Worried

Emerging majorities are more likely than Whites to get a good night's sleep almost every night, according to the National Sleep Foundation. Nearly half of Blacks do (45%), followed by 42% of Asians, 38% of Hispanics, and 36% of Whites. Asians (16%) are by far the least likely to say they only get a few good nights of sleep a month, compared to 34% of Blacks, 32% of Whites, and 28% of Hispanics.

Asians stay up later than other racial/ethnic groups, and awake later in the morning, whether on a weekday or a weekend. Whites, on the other hand, go to bed earliest and are among the earliest to rise. However, the average number of hours people sleep does not vary much by race/ethnicity: it ranges from 7.1 hours for Blacks to 7.4 hours for Asians on weekdays, and 8.1 hours for Blacks and Whites to 8.3 hours for Asians and Hispanics on weekends.

Whites (13%) are the most likely to use sleep medications a few nights a week or more, followed by Blacks (9%), Hispanics (8%), and Asians (5%). Whites (10%), Blacks (9%), and Hispanics (8%) are nearly equally likely to use alcohol

CONCERNS THAT DISTURB AMERICANS' SLEEP, BY RACE/ETHNICITY, 2010



**SOURCE:** National Sleep Foundation

to sleep, whereas only 3% of Asians do so. Hispanics (24%) are the most likely to use behavior methods to assist them in sleep, compared to 21% of Whites, 16% of Blacks, and 11% of Asians.

One explanation for why Asians are the least likely to use sleep aids and more likely to report good sleep is that they are less likely than other races/ethnicities to report worries that disturb their sleep.

**SOURCE:** "2010 Sleep In America Poll," National Sleep Foundation, David Cloud, CEO, 1522 K St. NW, #500, Washington, DC 20005; 202-347-3471; [nsf@sleepfoundation.org](mailto:nsf@sleepfoundation.org); [www.sleepfoundation.org](http://www.sleepfoundation.org). Price: Available online at no charge.

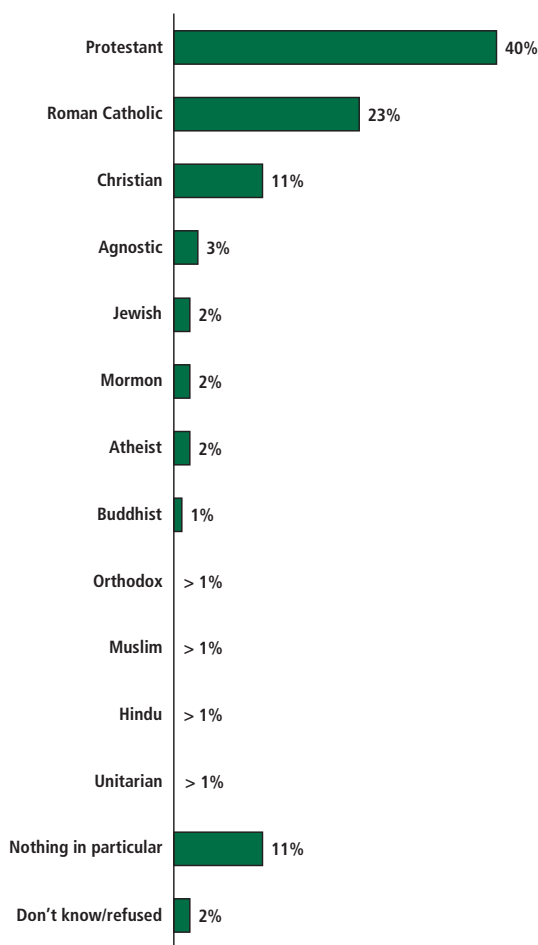
## Religious Service Attendees Are Not Loyal To Their Place Of Worship

More than a third of Americans (37%) attend religious services at least once a week, 16% do so once or twice a month, 18% a few times a year, 16% rarely, and 11% never, reports the Pew Forum on Religion & Public Life.

Of those who attend religious services at least a few times a year, 50% always attend at the same place, and 36% mostly attend at the same place. Some 28% attend services outside their own faith, including 18% of Protestants and 18% of Catholics.

More than a quarter of Americans (26%) believe there is spiritual energy in physical things (such as mountains, trees, or crystals), 25% believe in astrology, 24% in reincarnation, 23% in yoga as a spiritual practice, and 16% in the “evil eye” (that people can cast curses on others). Nearly three in 10 (29%) feel they have been in contact with a person who has died, and 18% claim they have seen a ghost. One in seven (15%) have consulted a fortune-teller or psychic.

AMERICANS’ RELIGIOUS AFFILIATIONS, 2009



SOURCE: Pew Forum On Religion & Public Life

SOURCE: “Many Americans Mix Multiple Faiths,” Pew Forum On Religion & Public Life, Robert Mills, Communications Associate, 1615 L St. NW, #700, Washington, DC 20036; 202-419-4564; rmills@pewforum.org; www.pewforum.org.

## Amish In America: Population Spreading Out

The Amish population in the U.S. grew 5% between 2009 and 2010 to 249,500, according to the Young Center for Anabaptist & Pietist Studies. Although the largest proportions of the Amish population live in Pennsylvania (24%), Ohio (23%), and Indiana (18%), they are spreading out around the country, primarily because they are seeking out cheaper farmland. The states with the largest increase in Amish population are:

- ▶ New York (up 19% between 2009 and 2010),
- ▶ Minnesota (up 9%),
- ▶ Missouri (up 8%),
- ▶ Wisconsin (up 7%), and
- ▶ Illinois (up 7%).

Amish reside in 28 states in 2010, up from 27 in 2009; a new community was established in South Dakota in 2010. Two states experienced declines in their Amish populations: Kansas and Nebraska.

SOURCE: “Amish Population Trends, 2009-2010,” Young Center for Anabaptist & Pietist Studies, Elizabethtown College, One Alpha Drive, Elizabethtown, PA 17022; 717-361-1000; www.etown.edu/amishstudies.

## One In Four Tweens, Teens Spend Two Hours A Day In Front Of Screens

One in four children and teens 9-15 (27%) are in front of a screen — such as a computer or TV monitor — more than two hours a day, according to research published in the journal *Pediatrics*. Boys, children from lower-income families, and Black children are most likely to sit in front of a screen the longest.

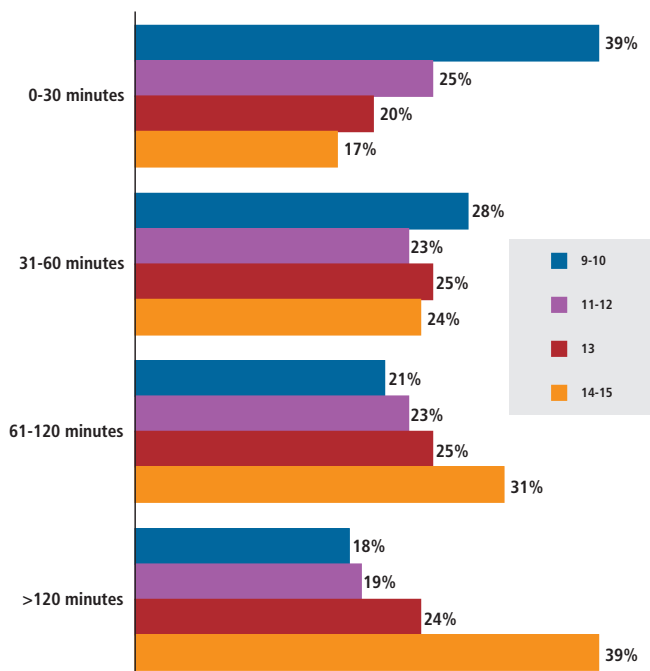
The older the child, the more time he or she spends sitting in front of a screen. Some 18% of children 9-10 exceed two hours of screen time a day, compared to 39% of those age 14-15. Similarly, 39% of those age 9-10 are in front of a screen less than 30 minutes a day compared to 17% of 14-15-year-olds.

The vast majority of children (77%) live in homes with cable TV, a key factor associated with above average screentime.

Half of parents (49%) have set limits on the amount of time their child sits in front of a screen, but only 37% of kids say their parents have rules regarding their screen time. Children whose parents have set limits on their screen time are significantly less likely to sit in front of a screen for more than two hours a day.

In order to help children and teens spend less time in front of screens, researchers recommend crafting awareness programs that focus on encouraging parents to set screen time limits, promote physical activities, and address the fact that age and socioeconomic status of the family are important effectors.

SCREEN TIME PER DAY, BY AGE GROUP



SOURCE: *Pediatrics*

SOURCE: "Influence of Limit-Setting and Participating in Physical Activity," *Pediatrics*, July 2010, Susan Carlson, Centers for Disease Control and Prevention, scarlson1@cdc.gov.

## Texting, Speeding, Chatting, Drinking: This Is Your Teen Behind The Wheel

Six in 10 teens (60%) worry about getting into a car accident while driving, though this fear doesn't prevent them from engaging in dangerous behaviors, according to Allstate Insurance. More than eight in 10 (82%) use cell phones while driving and 23% admit to drinking and driving. Two in three (65%) are confident in their own driving skills, though only 23% believe that most teens are good drivers.

**Girls Need for Speed.** Girls are more likely than boys to describe their driving as aggressive (16% vs. 13%) and to use a cell phone while driving (51% vs. 38%). Girls are also more apt than boys to adjust music selection or volume while driving (84% vs. 69%).

**Blacks Cautious, Hispanics Enjoy Racing.** Nearly half of Black teens never take risks while driving, compared to 32% of all teens. Black teens are also more likely than teens in general to speak up when they feel unsafe as a passenger (71% vs. 59%). Hispanic teens are nearly twice as likely as teens in general to say "speeding is fun" (30% vs. 19%). Hispanics are also more likely than all teens to drink and drive (30% vs. 23%).

**Are Parents Good Role Models?** Parents are less likely than teens to wear seatbelts (88% vs. 92%) and to signal when changing lanes (76% vs. 84%). Teens also consider parents (22%) to be more of a distraction than their friends (14%) while they drive. However, 80% still rate parents as their top driving influence.

SOURCE: Allstate Insurance, Joan Walker, SVP Corporate Relations, 2775 Sanders Rd., Northbrook, IL 60062; 847-402-5000; www.allstate.com.

# factoids

- ▶ A third of **apartment dwellers** (32%) have had a romantic relationship with a roommate or neighbor, and 40% would be open to the idea. (*Apartments.com*; phone: 312-601-5249)
- ▶ More than three quarters of Americans would **rearrange plans** — such as a wedding, first day on the job, or moving into a new home — to avoid having it fall on Friday the 13th. (*Discovery Communications*; phone: 240-662-5161)
- ▶ Nearly half of teen girls (48%) get information about **sex, pregnancy, and parenting** from TV shows. (*Candie's Foundation*; phone: 212-819-2066)
- ▶ Nearly one in five self-described **heterosexual adults** (17%) have been attracted to a member of the same sex, and 36% of those have acted on that attraction. (*Adam & Eve*; phone: 919-644-8100)
- ▶ Seven in 10 Americans (70%) turn to the Internet when they have a question about **sex**, followed distantly by books (23%), men's magazines (20%), asking friends (18%), and women's magazines (17%). (*Adam & Eve*; phone: 919-644-8100, x3121)

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**GIVEN THE CHOICE TO CHANGE THEIR SITUATION,  
AMERICANS WOULD RATHER BE...**

Richer .....	43%
Thinner .....	21%
Smarter .....	14%
Younger .....	12%
None of the above .....	9%

**SOURCE:** Harris Interactive; phone: 212-539-9600

- ▶ While 76% of couples want large, traditional **weddings**, some are going with less traditional features, such as 20% who have a friend or relative deputized to perform the ceremony. (*Brides magazine*; phone: 212-286-3809)
- ▶ Eight in 10 **Catholic Millennials** aged 18-29 (80%) say religion in an important part of their lives, and 82% believe that commitment and marriage are undervalued in society. (*Knights Of Columbus*; phone: 203-824-5412)





## men & women

The 80/20 rule that states women make 80% of household purchase decisions and men make 20% is shifting. Men are taking a more active role as shoppers, buying a greater proportion of household groceries, items for their children and families, and clothing for themselves.

Men approach shopping differently than women — for example, they buy clothing when they stumble upon something they like rather than making specific shopping trips for an item. When making purchases for their family, most consult their spouse, but they also talk to other dads for advice.

Like women, the vast majority of men are involved with causes and like to see companies supporting issues relevant to them. Most would try an unfamiliar brand or pay more for a product that supports a cause that they think is important.

Women express themselves through fashion, and private label goods can draw women to the retailers that exclusively carry the brands. Women have fully embraced online shopping because it allows them to shop any time and anywhere. Black women choose to shop online because they can find their size and get the best prices. Boomer women like online shopping because they can avoid in-person hassles of shopping, including dealing with sales people.

Women are open to interacting with brands online — they visit branded sites, receive email marketing messages, and share their opinions. They also go online for entertainment, such as TV shows, movies, music, and news. Women are avid social network users, visiting the sites not only to keep up and communicate with friends, but also to share their opinions about products and brands and to play games.

Age is just a number to most women, but they still want to look younger, which is why they invest in anti-aging products. While beauty is important to women, they still want it to be affordable. In fact, most women say they would buy more skincare products if they were less expensive.

## Men Want Companies To Support The Causes They Are Interested In

Men (88%) are nearly as likely as women (91%) to think it is important for a company to support a cause, according to *PRWeek* and Barkley. Men aged 42 to 60 (89%) were involved in some manner with a cause in the prior year, compared to 80% of 30 to 41 year olds, and 73% of 18 to 29 year olds.

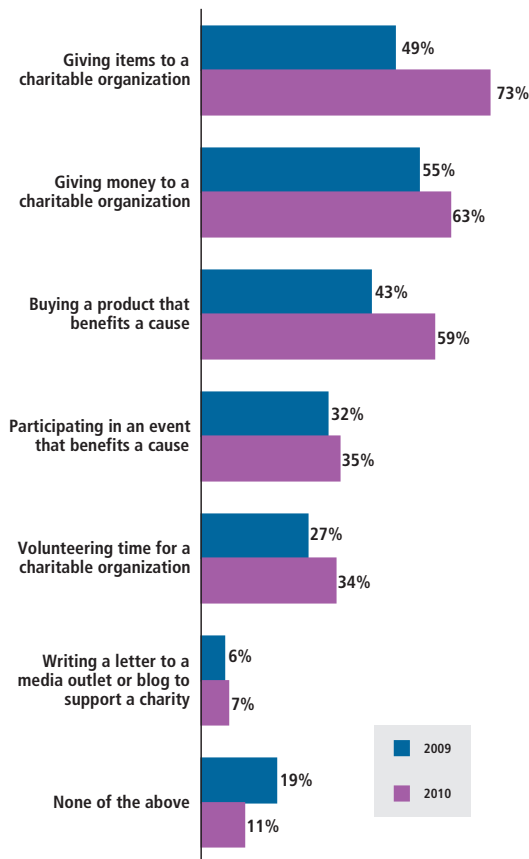
Two thirds of men (67%) would try a brand they normally would not have considered if it were connected to a cause. In addition, 55% would pay more for a brand or product that supports a cause that is important to them.

The primary causes men say they support include:

- ▶ Causes affecting children (20%);
- ▶ General health-related initiatives (18%);
- ▶ Poverty-related causes (12%);
- ▶ Animal welfare (11%);
- ▶ Disaster-related initiatives (10%);
- ▶ Men's health causes (9%); and
- ▶ Environmental initiatives (8%).

Men are more likely to be involved with causes in 2010 than they were in 2009.

WAYS IN WHICH MEN HAVE BEEN INVOLVED WITH CAUSES IN THE PRIOR YEAR, 2009 VS. 2010



SOURCE: *PRWeek* and Barkley

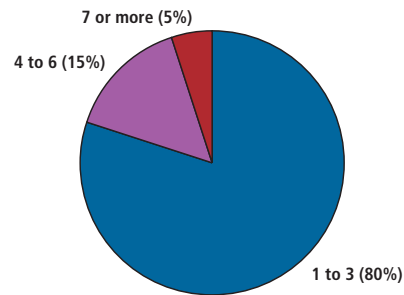
SOURCE: "Cause Survey," *PRWeek*, Alexandra Bruel, Consumer Reporting, 114 W. 26th St., 4th Fl., New York, NY 10001; 646-638-6040; alexandra.brue@prweek.com; www.prweek.com. Price: Call for information.

## The Clothes Make The Man: Suits And Shoes

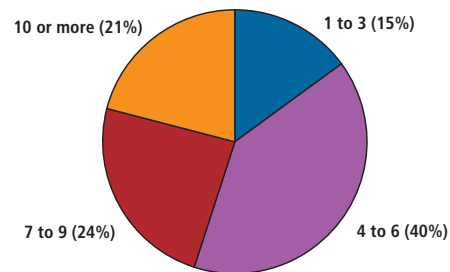
Young men (43%) most commonly agree they do not look for clothes but buy what they like when they stumble across items, according to AskMen.com. Nearly one in three (29%) buy clothes once or twice a year in big batches, while 24% shop for clothes regularly. Some 3% let their partner or spouse dress them. When they buy clothes, style is of the utmost importance to 69% of men, followed by comfort (18%), price (4%), uniqueness (4%), and trendiness (3%).

NUMBER OF SUITS AND PAIRS OF SHOES YOUNG MEN OWN, 2010

SUITS



PAIRS OF SHOES



SOURCE: AskMen.com

SOURCE: "The Great Male Survey 2010," AskMen.com, James Bassil, Editor-In-Chief, 4200 St-Laurent, #801, Montreal, Quebec H2W 2R2 Canada; 514-908-2552; advertising@askmen.com; www.askmen.com.

## Young Men Take An Assist From Mom & Dad

One in three men aged 18-34 (30%) say that things are great with work and their overall outlook on life, and they would not change a thing, finds Giant Realm. Some 45% say things are okay and would only make minor changes, whereas 16% want to make major changes to their lives, the sooner, the better.

Nearly half of young adult men (46%) live with their parents, with 62% of those aged 18-24. Of those who still live at home, 70% say their parents enjoy having them around.

Most men aged 18-34 (65%) are employed, including 40% who believe their job is taking them in the right direction for their careers. Nearly a quarter (25%) think they are ready for a different job. One in seven (14%) are unemployed, with 80% of those actively looking for work. Some 22% are students. Of those who are employed, 44% say their parents still give them spending money or pay some of their bills.

**SOURCE:** "GuyPulse Series," Giant Realm, Eric Alexander Frias, Business Development, 254 W. 31st St., 8th Fl., New York, NY 10001; 212-488-1740; efrias@giantrealm.com; www.giantrealm.com.

## Dads Talk To Other Dads For 'Guy' Purchases And Parenting Advice

Dads are most likely to turn to their spouse or partner (88%) for advice on purchases for the family, followed by their own parents (51%), according to Dad Central Consulting. They are less likely to seek the assistance of friends (35%), their children (29%), siblings (27%), and other dads (18%).

However, they do turn to other dads for advice about family purchases that fall into typical "guy stuff" categories, such as vehicles (45%), technology (49%), and sports (57%).

Nearly three quarters of dads (74%) consult other dads when buying items specifically for their children, and 69%

do so when buying items for their households. Some 68% turn to other dads for parenting advice.

**SOURCE:** "The New Trend: The 'Hands-On' Dad," Dad Central Consulting, John Porcaro, Managing Director, 77 Chapel St., Newton, MA 02458; 617-244-3002; jporcaro@dadcentralconsulting.com; www.dadcentralconsulting.com. Price: Call for information.

## New Fathers Face Personal Challenges

Nearly half of men (45%) say it is difficult to maintain an exercise routine after becoming a father, though 45% say they have become more health conscious since having children, according to Procter & Gamble. Nearly four in 10 new fathers (38%) also have difficulty maintaining friendships.

Among men aged 18-29 who become fathers:

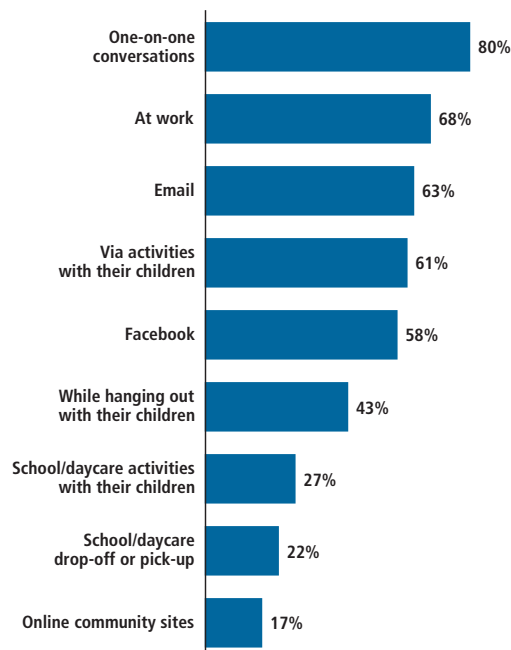
- ▶ 51% say it is difficult to maintain friendships;
- ▶ 34% have a hard time eating healthy; and
- ▶ 26% have trouble going to routine doctor's appointments.

Among men aged 30 or older who become fathers:

- ▶ 36% say it is difficult to maintain friendships;
- ▶ 28% have a hard time eating healthy; and
- ▶ 16% have trouble going to routine doctor's appointments.

**SOURCE:** "Manofthehouse.com Survey," Procter & Gamble, Jeannie Tharrington, 1 Procter & Gamble Plz., Cincinnati, OH 45202; 513-698-4607; tharrington.jm@pg.com; www.pg.com. Price: Call for information.

HOW AND WHERE DADS COMMUNICATE WITH OTHER DADS, 2010



**SOURCE:** Dad Central Consulting

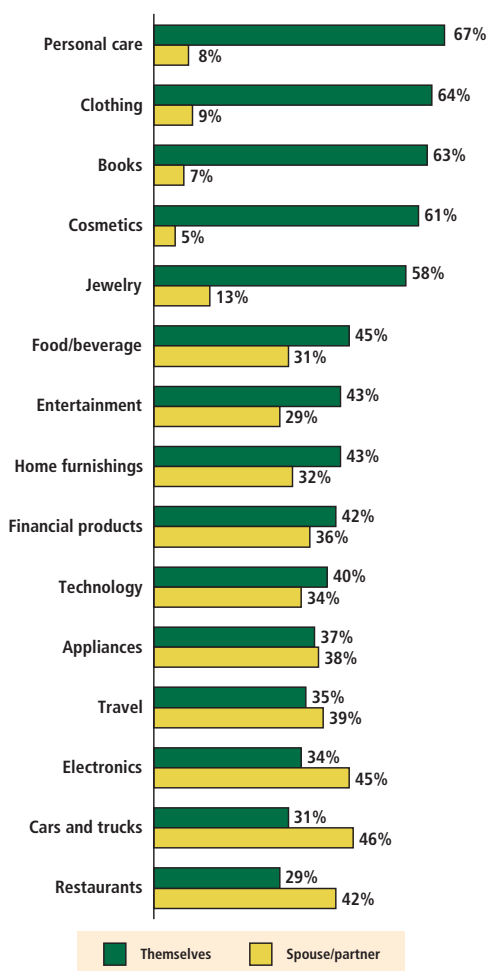
## Moms Get By Juggling Children, Household Chores & Personal Time

Eight in 10 women with children (80%) are happy to be moms, according to JWT and Meredith Publishing. Nearly half of them (49%) believe they are doing as good a job raising their children as their mother did with hers, whereas 36% believe their mom was better at it. Baby Boomer women (45%) are more likely than their peers to think their mom was the better mother.

Most moms (62%) give themselves a “B” grade at balancing their motherhood responsibilities. Since becoming a mom, 70% say their ability to multitask has improved. Despite that, 79% feel challenged to find time for themselves, though 75% manage to do so.

About half (51%) admit that the primary way they make time for themselves is by running errands or doing chores without their children. Some have told “white lies” (9%) or pretended to be asleep (8%) in order to have time to themselves.

WHO WOMEN SAY HAS MOST INFLUENCE OVER THEIR PURCHASES, THEMSELVES VS. SPOUSE/PARTNER, 2009



SOURCE: JWT and Meredith Publishing

A majority of moms (58%) are dissatisfied with their level of physical fitness. More than a quarter (27%) feel unattractive, and only 17% feel sexy. All of those factors contribute to some 65% of moms wanting to lose weight or get in better shape during the coming year.

If mom could hire a professional to help her out, her top choices would be a cleaning person/service (56%), a personal trainer (46%), an investment advisor (32%), a couples counselor (18%), and a sex therapist (11%).

SOURCE: “What Do Moms Want,” Meredith, Nancy Weber, CMO, 1716 Locust St., Des Moines, IA 50309; 515-284-3000; nancy.weber@meredith.com; www.parents.com. Price: Call for information.

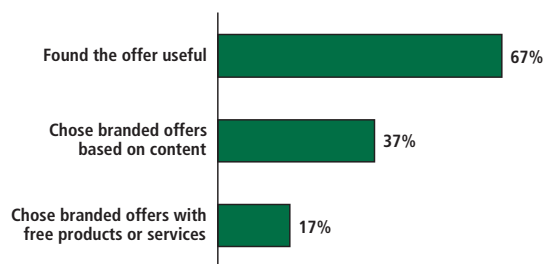
## Baby Boomer Women Embrace Electronics For Entertainment

A Baby Boomer woman may not be the stereotypical electronics enthusiast, but she is an avid user of a wide variety of electronics for entertainment, according to VibrantNation.com. Nearly half (45%) listen to downloaded music on a digital music player. In fact, 94% are music fans, 80% listen to music on CDs, and 40% buy six or more CDs per year.

Three quarters (75%) watch DVDs on their TVs, and 31% do so on their computers. A majority (52%) own and use DVRs, though 35% continue to use VCRs.

Smartphones are also popular with Boomer women, and 17% have iPhones. More than a quarter of those with smartphones (26%) use them for more than phone calls and email.

WOMEN’S ATTITUDES TOWARD BRANDED OFFERS IN SOCIAL NETWORKING GAMES, 2009



SOURCE: Q Interactive

SOURCE: “Media/Technology Survey,” Vibrant Nation, Stephen Reily, Founder, 111 W. Washington St., #100, Louisville, KY 40202; 502-589-7655; sreily@imclicensing.com; www.vibrantnation.com. Price: Call for information.

## Tech Enables Moms’ Communication, ‘Me Time’

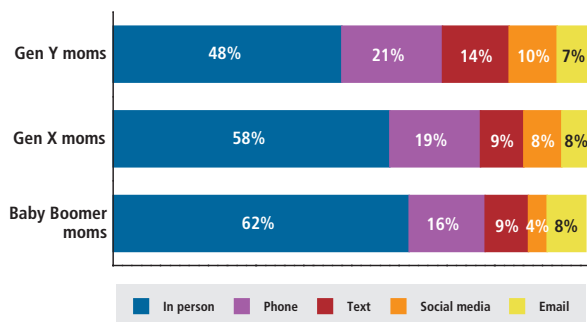
When moms want to reach family members, they most often do so in person, but phone, texting, and social media are popular among younger moms, according to WhyMomsRule.com. In fact, face-to-face communication is outweighed by digital communication among Gen Y moms.

Moms most commonly make time for themselves in the

evening when their children are asleep, including 57% of Gen Y moms, 55% of Gen X moms, and 37% of Baby Boomer moms. Boomer moms (32%) are significantly more likely than Gen Y and Gen X moms (19% each) to find “me time” in the morning before their family wakes up.

Nearly half of Gen Y moms (46%) and 43% of Gen X moms say browsing social media is a common “me time” activity, compared to only 28% of Baby Boomer moms. By comparison, Boomer moms are more likely than their younger counterparts to cite reading magazines (34% vs. 29% each of Gen Y and Gen X moms) and spending time outdoors (25% vs. 20% of Gen Y and 22% of Gen X moms) as “me time” activities.

**HOW MOMS COMMUNICATE WITH FAMILY MEMBERS, SHARE OF COMMUNICATION METHOD, BY GENERATION, 2010**



SOURCE: WhyMomsRule.com

SOURCE: “2010 Generations Survey,” WhyMomsRule.com, Bohan Advertising & Marketing, David Bohan, Chairman/CEO, 124 12th Ave S., Nashville, TN 37203; 615-327-1189; davidb@bohanideas.com; www.whymomsrule.com.

## Women Online: Where They Spend Time And What They Want

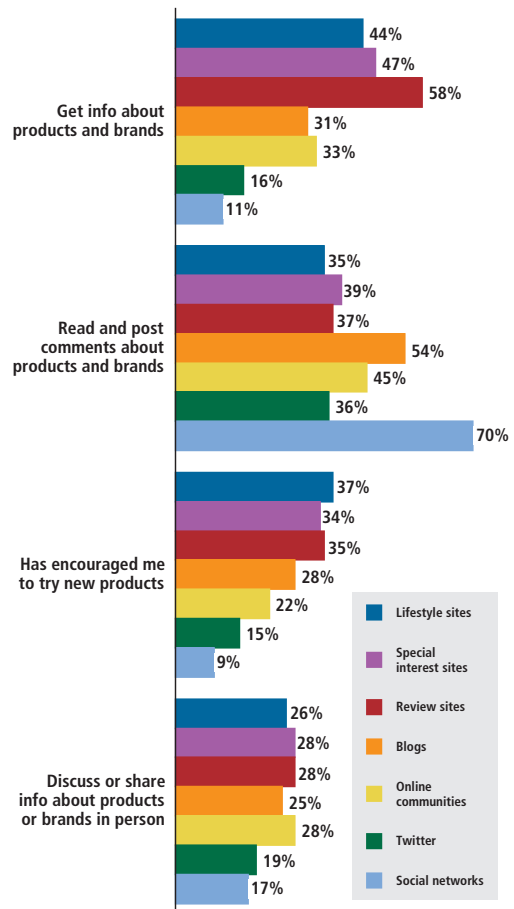
Women are active in the online conversations taking place on social networks and blogs, finds Yahoo! and Added-Value. Two thirds (67%) post comments on social nets, and 37% post comments on blogs. They also use both forums to share interesting links (41% and 21%, respectively) and share videos (31% and 12%, respectively). Women are also engaged, to a lesser degree, on online communities, special interest sites, and women’s lifestyle sites.

About a third of women take what they find online and share it with others in person, particularly what they find on review sites (36%), special interest sites (34%), online communities (31%), social networks (31%), and blogs (30%).

Social networks are less of a factor when it comes to women’s interactions with brands online. While 70% read and post comments about brands on social networks, they are less likely to share the information they find in face-to-face conversations (17%).

Women are more likely to turn to lifestyle sites, special interest sites and review sites for product information. In

**HOW WOMEN INTERACT WITH PRODUCTS AND BRANDS ONLINE, 2010**



SOURCE: Yahoo!

addition, they most commonly say those types of sites give them access to savings (30%, 28%, and 29%, respectively) and ensure they don’t miss out on good deals (27%, 26%, and 24%, respectively).

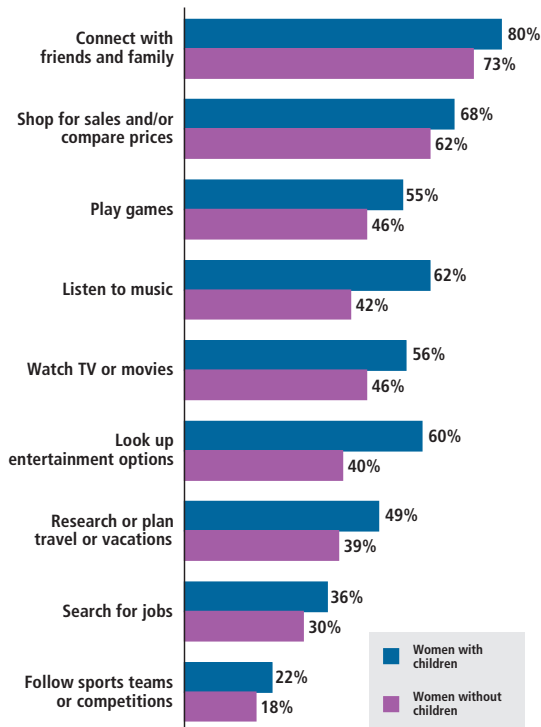
SOURCE: “Connectonomics: Women’s Edition,” Yahoo!, Amy Janis, 1065 Avenue of the Americas, 9th Fl., New York, NY 10018; 212-381-6825; amyjanis@yahoo-inc.com; www.yahoo.com. Price: Call for information.

## Women Accomplish A Lot Online, Especially Moms

The vast majority of women (95%) plan to go online during the summer for a variety of purposes, according to Unicast. They will:

- ▶ Connect with friends and family (76%);
- ▶ Keep up with the news (67%);
- ▶ Shop for sales and/or compare prices (64%);
- ▶ Entertain themselves (59%);
- ▶ Look up entertainment options (such as movies, local events, or sports matches) (48%);

ACTIVITIES WOMEN PLAN TO ENGAGE IN ONLINE, THOSE WITH CHILDREN VS. THOSE WITHOUT, 2010



SOURCE: Unicast

- ▶ Research travel plans and vacations (43%);
- ▶ Search for jobs (32%);
- ▶ Follow sports teams or competitions (20%).

Women with children are more active online in all of the above categories. The ages of their children also affect their propensity to do certain activities online. Those with teenage children are more likely to look up entertainment options (65%) than are those with children aged 12 and under (58%). They are also more likely to follow sports teams online (31% vs. 19%). Moms with children aged 12 and under are more likely than women with older children to watch TV or movies online (57% vs. 53%) and to look for jobs online (36% vs. 32%).

SOURCE: "What Women Want From The Web," Unicast, Bryan Hjelm, VP Marketing, 200 W. Cesar Chavez, #201, Austin, TX 78701; 512-469-5900; bryan.hjelm@unicast.com; www.unicast.com. Price: Available online at no charge.

## Women Gamers On Social Networks Present An Opportunity For Brand Engagement

Of woman gamers who play on social networks, 85% use only five games or apps, according to Q Interactive. Most (74%) get involved with a game or app because a friend or family member recommended it to them, or they noticed their score on the game.

The vast majority (97%) prefer to earn virtual currency by winning games or by accepting branded offers rather than buying it with real money. In fact, only 10% have used real money toward their gaming efforts. Nearly all (95%) have spent virtual currency to advance in the games they play or to send virtual gifts to friends. A slight majority (57%) believes giving virtual gifts is as meaningful as giving real gifts.

SOURCE: "Woman And Social Media Gaming And App-ing," Q Interactive, Emily Girolamo, One N. Dearborn St., 12th Fl., Chicago IL, 60602; 312-224-5151; egirolamo@qinteractive.com; www.qinteractive.com. Price: Call for information.

## Moms Are Open To Email Marketing Messages

Women with children under age 12 (80%) look forward to checking their email, and 96% do so at least once a day, finds Brunner.

In addition, 80% want to receive email messages from their favorite brands. Most commonly, they would like to receive such messages once a week (45%). About 60% of moms would provide information about themselves to receive more personalized messages from brands, and about 70% would provide information about their children if it meant they would get more tailored information and offers. Half (50%) say they are most likely to unsubscribe from branded emails because the information is not useful or interesting.

Moms are most interested in getting emails that include coupons (85%) and information about sales and promotions (73%). Nearly three quarters (78%) would make a special trip to a store after receiving a coupon via email, and 63% have printed coupons for brands they use or want to try so they have it on their next trip to the store.

SOURCE: "Are Moms Reading Your Emails?" Brunner, Ken Johns, VP, 11 Stanwix St., 5th Fl., Pittsburgh, PA 15222; 412-995-9500; kjohns@brunnerworks.com; www.brunnerworks.com. Price: Call for information.

## My How Time Flies: Women Spend Eight Years Of Their Lives On Shopping Trips

The average woman spends an estimated 25,185 hours shopping in her lifetime — the equivalent of eight years — according to OnePoll.com.

Each year, they make 301 shopping trips that take some 400 hours to complete.

That breaks down to:

- ▶ 84 food shopping trips, totaling 95 hours;
- ▶ 57 book shopping trips, totaling 31 hours;
- ▶ 51 window shopping trips, totaling 49 hours;
- ▶ 30 clothes shopping trips, totaling 101 hours;
- ▶ 27 toiletries shopping trips, totaling 18 hours;
- ▶ 19 gift shopping trips, totaling 36 hours;

- ▶ 18 accessories shopping trips, totaling 30 hours; and
- ▶ 15 shoe shopping trips, totaling 41 hours.

**SOURCE:** "Women Shopping Poll," OnePoll.com, Harriet Crosse, Abbeywood Business Park, Emma-Chris Way, Filton, Bristol UK BS34 7JU; 44-117-9066-555; info@onepoll.com; www.onepoll.com.

## Private Label Brands Draw Women To The Stores That Carry Them

Nearly a third of women (31%) shop certain stores because they are the only places where they can find a favorite brand — such as Walmart's Great Value or Kohl's Sonoma — according to *Private Label Consumers: Brands They Know, How They Shop & Which Media Reach Them* from EPM Communications, publisher of RESEARCH ALERT. Those shoppers are more likely to recommend that store to their friends and family (42%), to shop there more often themselves (41%), and to spend more at that store (33%).

Which women say exclusive brands make them more likely to shop the stores that carry them?

- ▶ Women aged 18-24 (41%) are more likely than their older peers to say so, and 43% of those say it increases how much they spend at the store.
- ▶ Single women (42%) are more likely than married women (30%) to say they shop stores for their exclusive brands.
- ▶ Women with kids (34%) are more likely than women without children (30%) to shop stores for their exclusive brands.

**SOURCE:** "Private Label Consumers: Brands They Know, How They Shop & Which Media Reach Them," EPM Communications, Ira Mayer, Publisher, 19 W. 21st St., New York, NY 10010; 212-941-1633, x27; imayer@epmcom.com; www.epmcom.com/label. Price: \$249 for paid subscribers to EPM newsletters; \$299 for others.

## Department Stores And Online Retailers Take Note: Black Women Use Fashion To Express Themselves

Black women are more likely than White women to place an emphasis on fashion and style every day, according to *Essence* magazine.

Black women spent an average of \$290 on fashion in the prior three months, whereas White women spent an average of \$255.

Black women (75%) are more likely than White women (65%) to like to keep current on the latest fashions. Most Black women (53%) want to get the latest look, compared to 45% of White women.

For Black women, fashion is about standing out:

- ▶ 49% of Black women want to be the first to take a look and make it their own, compared to 34% of White women.
- ▶ 73% of Black women see clothing as a way to express

themselves, compared to 65% of White women.

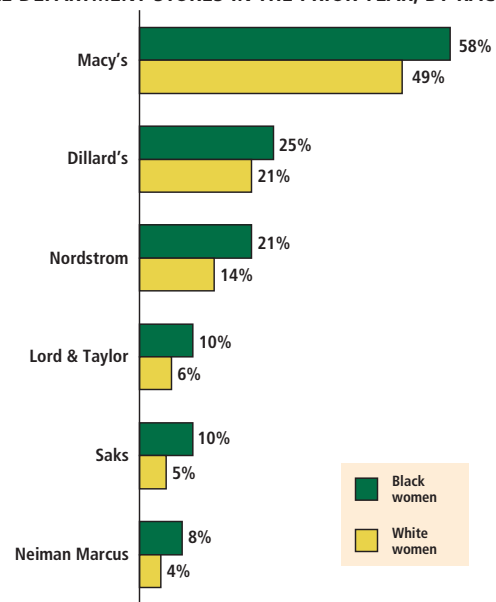
- ▶ 63% of Black women look for clothing that is unique and detailed, compared to 44% of White women.

Black women are particularly connected to brands. Half (50%) claim that buying brand-name clothing makes them feel good, and 63% will pay more for brands that have demonstrated quality. The vast majority of Black women (70%) plan to buy luxury apparel and shoe brands in the near future. More Black women (46%) than White women (31%) save money to be able to purchase the designer brands they want.

Fashion is as integral to their personal lives as it is to their careers: Black women (34%) are more likely than White women (26%) to say their clothes communicate that they've made it.

Black women out-shop White women in department stores and online. Black women bought an average of 20 fashion items online, compared to an average of 13 items

WOMEN WHO HAVE BOUGHT CLOTHING AND ACCESSORIES AT UPSCALE DEPARTMENT STORES IN THE PRIOR YEAR, BY RACE, 2009



SOURCE: *Essence*

REASONS BLACK WOMEN SHOP ONLINE, 2009



SOURCE: *Essence*

among White women. At department stores, Black women bought 10 items to White women's seven items, on average.

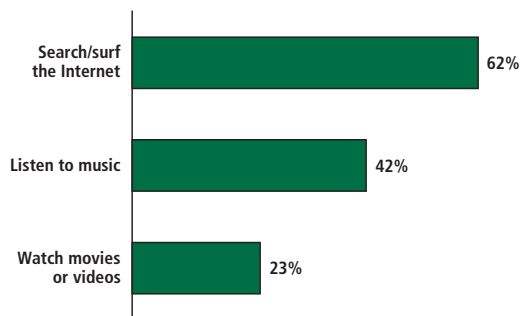
**SOURCE:** *Essence*, Michelle Ebanks, President, and Billie Causeeetsko, Fashion Director, 135 W. 50th St., New York, NY 10020; 212-522-0712; mebanks@essence.com; www.essence.com. Price: Call for information.

## Boomer Women Shop Online To Avoid Hassle

Women aged 50 and older make clothing purchases based on they way they look in the garments (59%) and on comfort (28%), according to VibrantNation. Only 8% reported that they base clothing purchases on price. Nearly one in five (19%) have a monthly clothing budget in excess of \$250.

Despite basing their clothing purchases on the physical characteristics of the merchandise, 65% now shop online to "avoid in-person" hassles. Some 13% *only* shop online. When asked about their experiences with salespeople, 84% of respondents said they found them "indifferent, inexperienced, invisible or rude" and 32% said that they felt ignored because of their age.

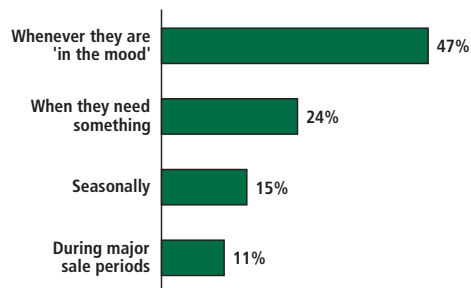
TOP ENTERTAINMENT ACTIVITIES FOR WHICH BABY BOOMER WOMEN USE SMARTPHONES, 2009



NOTE: Of those who have smartphones.

**SOURCE:** VibrantNation.com

WHEN WOMEN AGED 50 AND OLDER SHOP FOR CLOTHES, 2010



**SOURCE:** VibrantNation

**SOURCE:** VibrantNation, Stephen Reily, Founder, 111 W. Washington St., #100, Louisville, KY 40202; 502-589-7655; stephen@vibrantnation.com; www.vibrantnation.com. Price: Call for information.

## Moms And Mementos Won't Be Parted

Most moms save mementos from their pregnancy, according to e.p.t. The most common keepsake is ultrasound photos, which 88% of moms saved. Some 74% saved items from the delivery, including wristbands, blankets, and baby's first footprint. A quarter (25%) saved their pregnancy tests.

More than three quarters of moms (78%) revealed the big news to their partners in person, compared to only 14% who told their partner via phone. They next announced the news to their own mothers (46%), before informing friends and siblings.

**SOURCE:** "Pregnancy Keepsakes," e.p.t. (Johnson & Johnson), Sandra Correa, One Johnson & Johnson Plz., New Brunswick, NJ 08933; 917-319-8472, scorrea2@its.jnj.com; www.jnj.com.

## For Women, The Future Is In The Stars

More than a third of women (37%) check their horoscopes at least once a month, finds iVillage, which operates www.astrology.com. Those who read their own horoscopes also check their husband's (40%), their children's (25%), and other family members' (22%).

Some 28% claim their horoscope can change their mood depending on what it says, and 41% share their horoscopes with friends.

Nearly three in 10 women (29%) sometimes chalk up others' shortcomings up to their zodiac sign, and 21% believe that people born under certain zodiac signs have better sex lives than others.

**SOURCE:** "Horoscope Survey," iVillage, Jodi Kahn, EVP, 900 Sylvan Ave., Englewood Cliffs, NJ 07632; 212-664-4444; jodi.kahn@nbcuni.com; www.ivillage.com.



## Women Are Stressed And Tired, Men Less So

Working women are more likely than working men to feel like they don't have enough time in the day, are not well-rested, and experience a lot of stress, according to Gallup Poll. Further, women with young children are the least well-rested, and the most pressed for time. About half of women in the workforce have a child under age 18 at home, and 17% have children under age 5.

### ADULTS WHO ARE STRESSED, NOT WELL-RESTED, AND DO NOT HAVE ENOUGH TIME IN THE DAY, MEN VS. WOMEN, CHILDREN VS. NO CHILDREN, 2010

	WOMEN	MEN
<b>EXPERIENCE A LOT OF STRESS</b>		
Do not have children under age 18	44%	40%
Have children aged 0-4	50%	43%
Have children aged 5-17	47%	41%
<b>DO NOT FEEL WELL-RESTED</b>		
Do not have children under age 18	31%	26%
Have children aged 0-4	40%	31%
Have children aged 5-17	35%	27%
<b>DO NOT HAVE ENOUGH TIME IN THE DAY</b>		
Do not have children under age 18	28%	23%
Have children aged 0-4	41%	28%
Have children aged 5-17	34%	23%

SOURCE: Gallup Poll

SOURCE: "Despite Less Time and Rest, Working Moms Managing Well," Gallup Poll, Lydia Saad, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.galluppoll.com.

## Differences In Online Daters: Men Vs. Women

The average age of Americans who use online dating websites is 42 among men and 41 among women, according to Andrew Fiore and the University of California, Berkeley, School of Information. Women's profile descriptions were an average of 118 words, while men averaged 106 words.

On average, men seek women within the range of 11 years younger up to three years older. However, the older they are, the less willing they are to date women who are older. On average, women seek men within the range of five years younger up to seven years older. The younger they are, the more willing they are to date men who are older. Three quarters of online daters (75%) make contact with people within 100 miles of their location, with the average distance being 28 miles.

Men respond to 26% of the contacts they receive from interested women, whereas women respond to only 16%. Men are also quicker to reply, sending a note in an average of 16 hours, compared to women who reply in an average 19 hours.

SOURCE: "Online Dating Revelations," University of California, Berkeley, Andrew Fiore, Ph.D. Candidate, School of Information, 102 South Hall, Berkeley, CA 94720; 510-642-1464; atf@ischool.berkeley.edu; www.ischool.berkeley.edu.

## Women Vs. Men: Who Makes A Clean Sweep?

Nearly seven in 10 women (69%) claim they do more household chores than the men in their families, whereas 53% of men say the work is shared equally, according to Jelmar. The majority of Americans (91%) agree that women have made considerable strides working outside the home, but two thirds believe they should carry the larger load of household cleaning responsibilities. That may explain why married women are more likely than average to seek out cleaning products that multitask (70%), are fast acting (56%), and smell good (52%).

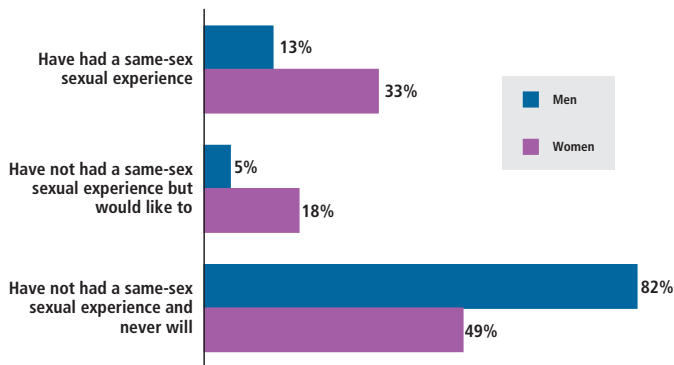
SOURCE: "Chore Wars," Jelmar, Adrienne Gibbons, 5550 W. Touhy Ave., #200, Skokie, IL 60077; 847-675-8400; adrienne@jelmar.com; www.jelmar.com.

## Sexual Experience Of American Men & Women

Gay men, straight men, gay women, and straight women each have the same average number of sexual partners, six, according to a survey of OKCupid dating site users. In addition, 45% of gay people have had 5 or fewer sexual partners, as have 44% of straight people. Some 98% of gay people have had fewer than 20 sexual partners, as have 99% of straight people.

A quarter of straight men and women (25%) have had a same-sex sexual experience, 11% have not but would like to, and 66% have not and never would. Women are significantly more likely both to have had and want to have a same-sex sexual experience.

STRAIGHT MEN AND WOMEN'S SAME-SEX SEXUAL EXPERIENCE, 2010



SOURCE: OKCupid

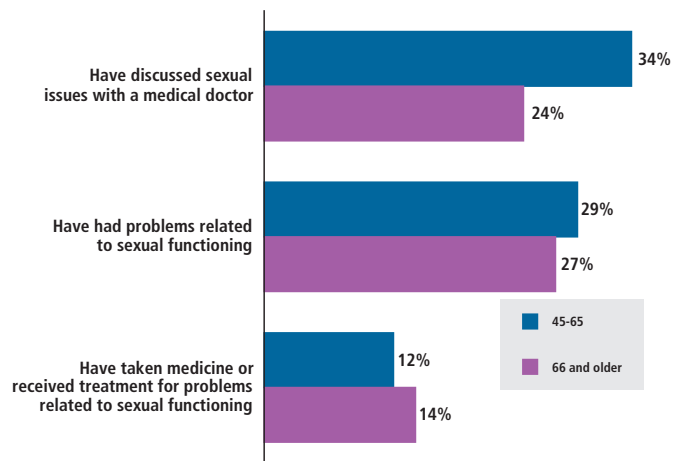
SOURCE: "Gay Sex Vs. Straight Sex," OKCupid, Christian Rudder, 589 Eighth Ave., 11th Fl., New York, NY 10018; 646-216-8762; christian@okcupid.com; www.okcupid.com.

## Older Americans' Attitudes Toward Sex

Half of American adults (51%) feel that sex is a critical part of a strong relationship, according to the Associated Press and LifeGoesStrong.com. A majority of those aged 18-29 (52%) and 30-44 (71%) say so, compared to 45% of 45-65 year olds and 29% of those aged 66 and older.

Half (50%) think sex becomes less important to most people as they get older, whereas 45% say it is just as important to older people as it is to younger people. Only 5% say it becomes more important as people age. Those aged 66 and older are significantly more likely to say sex becomes less important (76%) than to say it remains as important (23%) or becomes more important (2%).

OLDER AMERICANS SEEKING MEDICAL ADVICE FOR SEXUAL ISSUES, 2010



SOURCE: Associated Press and LifeGoesStrong.com

SOURCE: "Relationships Survey," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; surveys.ap.org.

## factoids

- The vast majority of American women (85%) have tried to **lose weight** at least once in their lives, and 51% of married women would like their husbands to lose weight. (*Reader's Digest*; phone: 212-850-7100)
- The average woman who **worked full time** earned \$35,745 in 2008, down from \$36,451 in 2007 (after adjusting for inflation); that amounts to 77 cents for every dollar earned by men in 2008. (*U.S. Census Bureau*; 301-763-3030)
- Nearly a third of women (31%) wash their **hair** every other day, and 20% wear an accessory in their hair at least a few times a week. (*Sally Beauty Supply*; phone: 940-297-2049)
- One in six Baby Boomer women (16%) have a **Kindle or other e-reader**, and 67% of those who do not would like one. (*Vibrant Nation*; phone: 502-568-5555)
- Nearly half of women (47%) wish they had more time to spend **cooking meals**, though if they had free time, 83% would choose an activity other than cooking to fill it. (*National Pork Board*; phone: 515-223-3528)
- Men in Philadelphia are most likely to have **full beards** (21%); men in Atlanta are most likely to have goatees (32%); men living in Dallas are the most likely to have soul patches (14%); and men in Boston are most likely to be clean shaven (31%). (*Schick*; phone: 203-882-2100)
- Nearly half of Baby Boomer women (47%) prefer to shop for **cosmetics** without assistance from a salesperson. (*Mintel*; phone: 312-628-7946)
- A slight majority of women (56%) say that **mosquitos** prevent them from fully enjoying the outdoors in summer months, and 29% rarely use bug spray because they dislike how it feels on their skin. (*SC Johnson*; phone: 262-260-2440)
- Three quarters of women (75%) have experienced a lack of **sexual desire** at least occasionally, but only 14% have ever discussed the condition with a doctor. (*Society for Women's Health Research*; phone: 202-496-5008)
- Women with children who **host parties** are driven to do so to create new traditions for their families (70%), while women aged 21-34 want to express themselves, with 64% making decorations, place settings, or favors for the event. (*Martha Stewart Omnimedia*; phone: 212-827-8722)
- Women (81%) say **health and beauty products** infused with nature improves their mood, and 77% say products with natural scents make them feel as though they have been transported somewhere that is stress-free. (*Unilever*; phone: 312-661-2326)
- Women (78%) are more likely than men (62%) to use lighter fluid in starting their **charcoal grill**. (*Weber-Stephen Products*; 224-836-2724)
- Two thirds of men (65%) experience skin irritation or discomfort when **shaving**. (*Procter & Gamble/Gillette*; phone: 617-463-5777)
- Most women (76%) would like to be able to create more professional, salon-quality **hairstyles** at home, but a majority thinks home style accessories are difficult to use and cost too much. (*Goody*; phone: 770-418-7723)
- Two thirds of women (67%) say that insulting their **cooking** for a holiday meal or special occasion is the equivalent of insulting their character. (*Martha Stewart Living Omnimedia*; phone: 212-827-8722)
- To keep the **passion** alive in their relationship, couples plan regular dates (48%), buy racy lingerie (40%), and simply turn off the television (37%). (*Grove Medical*; phone: 877-239-0005)
- Men are more likely than women to initiate contact with a prospective mate via **online dating**; men also respond faster, taking an average of 16 hours to reply to a woman's online dating "wink," while it takes women and average of 19 hours to reply. (*UC Berkeley School of Information, Andrew Fiore, author*; phone: 510-642-1464)
- Women **bloggers** are "unplugged" for an average of four waking hours a day; the most common reason they go offline is to spend time with family (78%). (*Liberty Mutual's Responsibility Project*; phone: 617-357-9500)
- Seven in 10 women (70%) say their **shoes** are uncomfortable after a long night out, and 80% say it affects their mood when their feet hurt. (*Dr. Scholl's/Merck*; phone: 909-423-6537)
- More than half of women who have been on **vacation** (56%) do not feel rejuvenated after the break, and 46% feel sluggish while on or after returning from a vacation. (*Kellogg's*; phone: 269-961-3799)
- Seven in 10 **brides-to-be** (70%) believe they can get everything they want for their wedding and stay within their budget, though 92% are contributing to their budget themselves. (*Get Married Media*; phone: 404-888-9091)
- The vast majority of moms (98%) say it is important to have a **clean bathroom**, but 91% think it's a never ending cleaning challenge. (*SC Johnson*; phone: 262-260-2440)
- More than three quarters of **women** (77%) say they live by the philosophy of "women empowering women." (*Americans For UNFPA*; phone: 646-649-9110)
- Only 27% of **momms** are happy with the way they look. (*CafeMom*; phone: 646-435-6638)



# mobile media

Mobile phones are nearly ubiquitous in 2010. The number of cell phone-only households continues to rise as consumers ditch their landline and the additional bill that comes with it. The way Americans use their mobile phone is also shifting — they spend less time using it to talk but are sending more text messages. The younger the user, the more texts they send and the fewer minutes they spend talking. Most mobile phone owners use their devices to take pictures.

Not everyone has fully adopted mobile media. Some older Americans stick to a basic, low-cost plan and only use their devices for talking and the occasional text message.

On the opposite end of the spectrum are smartphone owners, who account for about 20% of cell phone owners. Women are nearly as likely as men to own a smartphone. Smartphone owners are more likely than other cell phone owners to use their devices to go online, download apps, listen to music, watch video, and obtain other content and services. Many smartphone owners (including men) use their devices for shopping, whether to make an actual purchase, locate a store, or compare prices when in-store.

Blacks and Hispanics are ahead of the curve using mobile technology. They are more likely than Whites to use their cell phones for shopping activities. Among young Hispanics, half keep in touch with friends by texting on a daily basis, and nearly the same proportion call their friends on their cell phones as often.

The age at which children receive their first cell phone is trending downward to tweens. Their parents' economic situation is a key factor so far as teens and tweens having their own cell phone. The youngest cell phone owners use their devices primarily for communication and are less likely to use them to download ringtones or listen to music. As they age into high school and college, they are more likely to download apps, and are willing to pay for them.

## Cell Phones Become Even More Ubiquitous

Cell phone ownership in the U.S. continues to grow, with 87% of adults (up from 78% in 2008), 72% of 12-17 year olds (up from 69%), and 21% 6-11 year olds (up from 19%) having their own devices, according to Experian Simmons. Aside from making calls and texting, the most popular use of cell phones is taking pictures (70%).

### ACTIVITIES AMERICANS ENGAGE IN ON CELL PHONES, 2010

Take photos	70%
Personal email	31%
Play games	31%
Access the Internet	31%
Maintain their calendar	30%
Listen to music or other audio	23%
Download ringtones	22%
Business email	21%
Take videos	19%
Access GPS	14%
Download music	13%
Download apps	11%
Access social media	10%
Banking	9%
Upload pictures to a shared site	8%
Shop	8%
Watch downloaded video	6%
Watch streaming video	6%

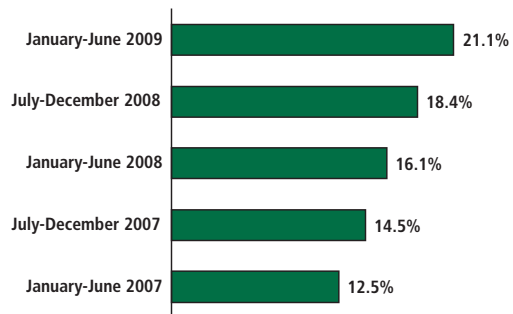
SOURCE: Experian Simmons

SOURCE: "2010 Technology Report," Experian Simmons, Eileen Merken, Director Analytics, 1501 SW FAU Research Park Blvd., #100, Deerfield Beach, FL 33441; 954-246-8220; eileenm@smrb.com; www.smrb.com. Price: Call for information.

## Cord Cutting: Young Adults, Renters, Hispanics

Nearly a quarter of households (22.7%) are wireless-only — meaning they do not have a landline phone — as of the first half of 2009, according to the Centers For Disease Control And Prevention. An additional 14.7% have landlines but get most of their calls on their wireless phones.

### ADULTS WITH WIRELESS-ONLY TELEPHONE SERVICE, 2007-2009



SOURCE: Centers For Disease Control And Prevention

The proportion of adults who are wireless-only has steadily increased to 21.1% (or 48 million) in the first half of 2009. Only 1.5% do not have any telephone service, a proportion that has remained relatively flat.

- Adults who are wireless only are more likely to be:
- Living with an unrelated roommate (68.5%);
  - Renters (40.9%);
  - Aged 25-29 (45.8%);
  - Living in poverty (33.0%);
  - Living in the South (25.0%); and
  - Hispanic (28.2%).

SOURCE: "National Health Interview Survey," Centers For Disease Control And Prevention, Stephen Blumberg, Division of Health Interview Statistics, 3311 Toledo Rd., #2112, Hyattsville, MD 20782; 301-458-4107; sblumberg@cdc.gov; www.cdc.gov. Price: Available online at no charge.

## Wireless-Only Households

In the second half of 2009 — the most recent data available — 56.1% of households had at least one wireless telephone, according to the Centers for Disease Control & Prevention. In addition, 25% of households (accounting for 23% of adults and 26% of children) were wireless-only, meaning they did not have a landline phone but had at least one wireless phone. This denotes a steady increase of wireless-only households since 2003, and 4.8% increase compared to the second half of 2008.

- ▶ Young adults are more likely than average to live in wireless-only households, including 38% of 18-24 year olds, 49% of 25-29 year olds, and 37% of 30-34 year olds.
- ▶ Men (25%) are more likely than women (21%) to live in a wireless-only household.
- ▶ More households in the Midwest (26%) and South (25%) than in the West (22%) and Northeast (15%) are wireless-only.
- ▶ Hispanics (30%) are more likely than Blacks (25%) and Whites (21%) to have wireless-only households.
- ▶ A greater proportion of heavy drinking adults — defined as those who consume five or more alcoholic drinks in a day — live in wireless-only households (35%) than in households with a landline (19%).
- ▶ Adults in wireless-only households (65%) are more likely than those in households with a landline (60%) to describe their health as "very good or excellent."

SOURCE: "National Health Interview Survey," Centers For Disease Control & Prevention, Stephen Blumberg, Division of Health Interview Statistics, 3311 Toledo Rd., #2112, Hyattsville, MD 20782; 301-458-4107; sblumberg@cdc.gov; www.cdc.gov. Price: Available online at no charge.

## Mobile Web Users Are Social, Conduct Business

Americans with Internet access on their mobile phones spend an average of 2.7 hours a day on the mobile Web. More than nine in 10 mobile Web users (91%) go online to

socialize, compared to 79% of those who access the web via a computer. Mobile Web users top social intentions when they go online are:

- ▶ Text message (62%);
- ▶ Forwarding emails (58%), sharing content (40%), and sharing photos (38%);
- ▶ Posting comments on social networks (45%); and
- ▶ Connecting with people on social networks (43%).

Mobile web users (60%) are more likely than traditional web users (45%) to go online to conduct business, and they are particularly more likely to access the web to manage their finances. Mobile Web users' top business intentions online are:

- ▶ Conducting online banking (46%);
- ▶ Checking bill/credit card status (40%); and
- ▶ Reading business blogs (33%).

Nearly half of mobile Web users (49%) go online to advocate for issues and causes, compared to 41% of traditional Web users. In addition, mobile Web users are 40% more likely than traditional users to activate support for causes. Their primary advocacy intentions online are:

- ▶ Activating support for a cause or petition (67%);
- ▶ Posting opinions on social networking sites (45%); and
- ▶ Forwarding information about a cause (40%).

The mobile Web does not lend itself well to educational or creative applications due to the time requirements of those activities, so mobile Web users are less likely to go online for those reasons than are traditional users.

**SOURCE:** "Mobile Intent Index," Ruder Finn, Kathy Bloomgarden, Co-CEO, 301 E. 57th St., New York, NY 10022; 212-593-6497; bloomgardenk@ruderfinn.com; www.ruderfinn.com. Price: Survey topline are available online at no charge; for a customized report, call for pricing information.

## Cell Phone Owners Fall Into Distinct Categories Based On Behavior

Experian Simmons has classified the 87% of American adults with cell phones into five consumer segments based on their behaviors and attitudes toward their phones.

**Mobirati** (19% of cell phone owners) grew up with cell phones and cannot imagine life without them. Their favorite mobile brands include Blackberry, iPhone, and Nextel.

- ▶ Spend an average of \$97 a month on cell services.
- ▶ More likely than the average cell phone user to include international calling and mobile TV as part of their cell phone plans.
- ▶ 170% more likely than average to be interested in a service that allows them to make purchases in a store using their cell phones.
- ▶ 140% more likely than average to use their phone to find information to decide where to go and what to do in their free time.

**Social Adopters** (22%) feel that communication is essential to their lives, and their phones help them keep in touch

with friends and manage social events. Their favorite mobile brands include Sanyo, LG, and Nextel.

- ▶ Spend an average of \$105 a month on cell services.
- ▶ More likely than average to include unlimited data and unlimited text messages in their cell phone plans.
- ▶ 70% more likely than average to say that their friendships wouldn't be as close without their cell phones.
- ▶ 61% more likely than average to feel that text message conversations are just as meaningful as phone conversations.

**Pragmatic Adapters** (22%) were adults when cell phones became common and are just learning to use their phones for activities other than talking. Cell phones continue to be functional rather than a source of entertainment for this segment. Their favorite mobile brands include Motorola, Nokia, and Sanyo.

- ▶ Spend an average of \$86 a month of cell services.
- ▶ More likely than average to include unlimited voice in their cell phone plans.
- ▶ 62% more likely than average to claim they will switch providers as soon as possible if their cell phone service is poor.
- ▶ 53% more likely than average to say they use their phones for basic calling rather than any other features.

**Basic Planners** (20%) are not interested in cell phones or technology in general. They use their phones for basic communication only. Their favorite mobile brands are Nokia, Kyocera, and Nextel.

- ▶ Spend an average of \$76 a month on cell services.
- ▶ More likely than average to include unlimited voice in their cell phone plans.
- ▶ 72% more likely than average to only use their phones in case of emergency.
- ▶ 31% more likely than average to claim call phone plans are confusing to them.

**Mobile Professionals** (17%) use their phones to manage both their professional and personal lives. Their phones are necessary for communication and information needs alike. Their favorite mobile brands are iPhone, Blackberry, and Palm.

- ▶ Spend an average of \$104 a month on cell services.
- ▶ More likely than average to include international dialing, mobile TV, unlimited data, and unlimited text in their cell plans.
- ▶ 86% more likely to claim the extra features on their phones are more important than the traditional calling features.
- ▶ 73% more likely than average to be willing to switch providers to have access to the latest technology.

**SOURCE:** "Segmentation of Mobile Consumers: Simmons National Consumer Study," Experian Simmons, Eileen Merken, Director Analytics, 1501 SW FAU Research Park Blvd., #100, Deerfield Beach, FL 33441; 954-246-8220; eileenm@smrb.com; www.smrb.com. Price: Call for information.

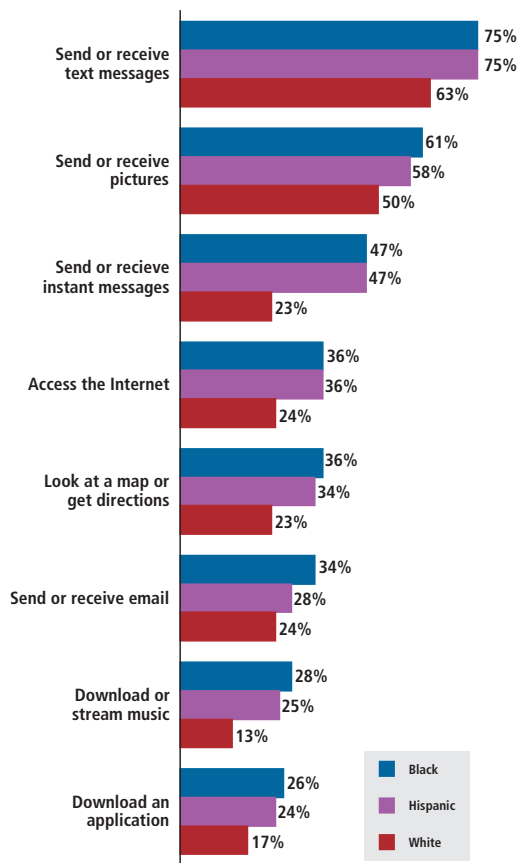
## Young Adults, Emerging Majorities Lead Adoption Of Cell Phones As Entertainment And Shopping Devices

Cell phones are nearly ubiquitous in America in 2010, with 86% of all adults owning one — including 94% of 18-29 year olds, 93% of 30-49 year olds, 86% of 50-64 year olds, and 66% of those aged 65 and older — according to the Federal Communications Commission (FCC). Blacks (86%) and Hispanics (85%) are nearly as likely as Whites (87%) to own a cell phone. Those who receive a cell phone bill (not coupled with other telecom services) spend an average of \$92 a month.

### Texting Vs. Talking

Americans are nearly as likely to use their mobile phone for texting as for talking, according to Nielsen Company. Women spend an average of 14.3 hours a month talking on their cell phones, and they send and receive an average of 601 text messages. Men spend an average of 11.1 hours a month talking on their cells, and they send and receive an average of 447 text messages.

ACTIVITIES FOR WHICH AMERICANS USE THEIR CELL PHONES, 2010



NOTE: Of cell phone owners

SOURCE: Federal Communications Commission

Young cell phone owners are leading the way in the text revolution, with 18-24 year olds out-texting 25-34 year olds by nearly two-to-one (1,299 vs. 592 text messages). They spend nearly an equal amount of time talking on the phone, with 18-24 year olds averaging 16.4 hours a month, compared to 15.9 hours for 25-34 year olds.

Emerging majorities outpace Whites in both talk time and text messaging:

- ▶ Blacks spend nearly 22 hours a month talking and send or receive 780 text messages.
- ▶ Hispanics spend more than 14 hours a month talking and send or receive 767 text messages.
- ▶ Asians spend more than 11 hours a month talking and send or receive 384 text messages.
- ▶ Whites spend nearly 11 hours a month talking and send or receive 566 text messages.

### Other Phone Activities

Calling and text messaging dominates Americans' cell phone usage. However, the FCC notes a significant portion of cell phone owners use their devices for other tasks, such as:

- ▶ Sending or receiving pictures (52%);
- ▶ Sending or receiving instant messages (28%);
- ▶ Accessing the Internet (28%);
- ▶ Looking at a map or getting directions (27%);
- ▶ Sending or receiving email (26%);
- ▶ Downloading an application (20%);
- ▶ Downloading or streaming music (17%).

Cell phone owners under age 50 are much more likely than those aged 50 and older to use their cell phones for tasks aside from typical communications. Blacks and Hispanics are more likely than Whites to use their phones for non-communication activities (see chart, p. 5). The researchers suggest emerging majorities are more active on their cell phones because such usage is more typical of younger cell phone owners, and the emerging majority population has a younger average age than Whites.

Cell phone owners who use their devices to access the Internet primarily do so as an additional way to go online rather than as a substitution for home Internet access. Of those who use the mobile Internet, 91% have Internet access at home, and 84% have broadband access. Among those who do not have home access, Hispanics (25%) are more likely than Americans overall (14%) to use mobile Internet as a replacement.

### Mobile Shopping

Some 6% of cell phone users access retail websites from their devices, as do 16% of smartphone owners, finds comScore. One in ten smartphone owners (10%) have bought physical items via their devices, with those who made a purchase spending an average of \$121 in the prior three months. Smartphone owners also buy digital content via their devices, most commonly music (17%, spending an average of \$19 a month), games (17%, spending an average of \$24 a month), and applications (14%, spending an average of \$10 a month).



**SOURCES:** "Broadband Adoption And Use In America," FCC, John Horrigan, Consumer Research Director, 445 12th St. SW, Washington, DC 20554; 202-415-1553; john.horrigan@fcc.gov; www.fcc.gov. Price: Available online at no charge.

"Mobile Usage Data," Nielsen Company, Chris Quick, Mobile Media Analyst, 700 Broadway, New York, NY 10003; 646-654-5000; www.nielsen.com. Price: Call for information.

"State Of The Online U.S. Retail Economy," comScore, Gian Fulgoni, Chairman, 11465 Sunset Hills Rd., #200, Reston, VA 20190; 202-438-2000; gfulgoni@comscore.com; www.comscore.com. Price: Call for information.

## Mobile Commerce Grows With 25-34 Year Olds Leading The Way

One in five mobile phone owners have made a mobile commerce purchase in the prior month, according to the Mobile Marketing Association (MMA). Some 17% have purchased mobile content (ringtones, apps), 6% have used mobile coupons or discounts on purchases, and 6% have bought physical goods and services. The growth in smartphone ownership — among all age groups — has enabled the growth in mobile commerce.

Those aged 25-34 are the heaviest mobile commerce users:

- ▶ 35% use their mobile devices to purchase content for their phones;
- ▶ 11% buy physical goods;
- ▶ 10% use mobile coupons and discounts; and
- ▶ 4% redeem loyalty program points via their devices.

Not only are 25-34 year olds more willing to experiment with new technology and use all of their phone's features, they are also at a life stage in which they are buying more goods.

Most people who use their mobile device for a purchase are satisfied customers. Nearly eight in 10 (79%) feel their transaction was secure and trustworthy when buying physical goods and services, 74% when using mobile tickets (such as for airline boarding), and 58% when using coupons or discounts. Most also believe such transactions are quick and easy; however, those under age 35 are more likely than older mobile commerce users to think so, in part because they are more adventurous and comfortable using the technology.

**SOURCE:** "May 2010 U.S. Mobile Consumer Briefing," Mobile Marketing Association, Peter Johnson, VP Market Intelligence, 8 W. 38th St., #200, New York, NY 10018; 408-242-5733; research@mmaglobal.com; www.mmaglobal.com. Price: Report and data tables available at no charge to MMA members; \$1495 for non-members.

## Shoppers, Especially Young Men, Embrace Mobile Technology And Coupons

One in 10 cell phone owners (10%) have made a trip to a store because they received a coupon on their mobile phone, according to InsightExpress. Among 18-34 year olds, that proportion jumps to 20%. Nearly half of shoppers (45%) prefer to receive mobile coupons via text message, com-

pared to 28% who would rather find coupons themselves via an app and 27% who prefer to have coupons texted to them while they are in the store.

Some 6% of shoppers have looked for a coupon on their mobile phone while shopping, including 21% of men aged 25-34. The same proportion (6%) have used a coupon while shopping that was already on their phone, including 17% of men aged 25-34.

Men aged 25-34 are more likely than average to have smartphones, and they are more likely than average to say they use their phones to assist them in their shopping tasks. Nearly a quarter (23%) have used their phones to find product reviews, compared to 8% of cell phone owners overall, and 20% have used their phones to see if they can find a product at a better price, compared to 7% overall.

The male mobile shopper segment is also more likely than average to use mobile coupons at:

- ▶ Clothing stores (35% of male mobile shoppers vs. 15% of cell phone owners overall);
- ▶ Department stores (30% vs. 15%);
- ▶ Electronics stores (30% vs. 10%); and
- ▶ Service locations (16% vs. 7%).

Male mobile shoppers are more likely than average to prefer to find mobile coupons themselves via an app (51%) and to receive them via text while in store (39%).

**SOURCE:** "Get Ready For The Mobile Shopper," InsightExpress, Drew Lipner, SVP and Group Director, 575 Market St., #2650, San Francisco, CA 94105; 415-321-3702; dlipner@insightexpress.com; www.insightexpress.com. Price: Call for information.

## Americans Who Access Mobile News Are Online Media Mavens

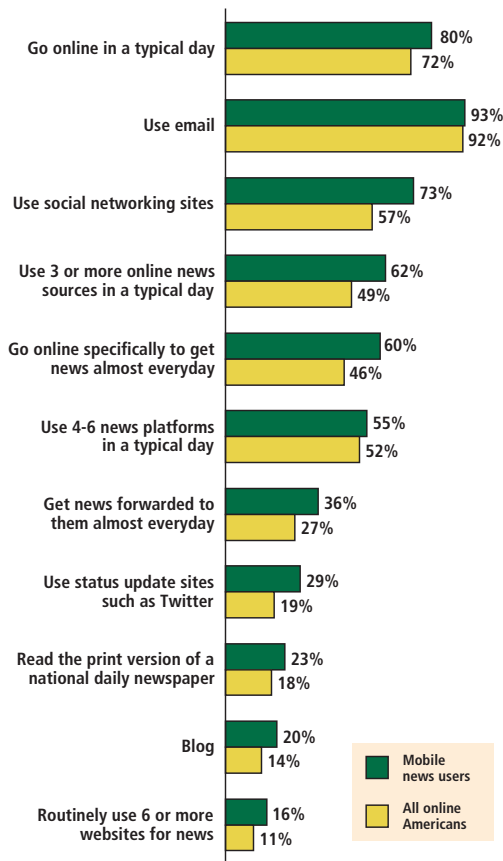
A slight majority of Americans (53%) has wireless access to the Internet via a laptop, cell phone, or PDA, according to Pew Internet & American Life Project. Those who access the Internet wirelessly are 36% more likely than the average online American to go online in a typical day.

Of those who have Internet access on their cell phone, 88% get news on their phones. They most commonly:

- ▶ Check weather reports (72%);
- ▶ Get news and current events information (68%);
- ▶ Download an application that allows them to access news, weather, and sports information on their phones (49%);
- ▶ Check sports scores and information (44%);
- ▶ Check traffic information (35%);
- ▶ Get financial information or updates (32%); and
- ▶ Get news alerts by text or email on their phones (31%).

The typical mobile news user is white, male, aged 34, a college graduate, and employed full-time. Four in 10 (40%) are parents of young children, and 32% have never been married. A third (32%) have household incomes of \$75,000 or more. Mobile news users are also more active online than typical Internet users.

**INTERNET ACTIVITIES OF MOBILE NEW USERS VS. ALL ONLINE AMERICANS, 2010**



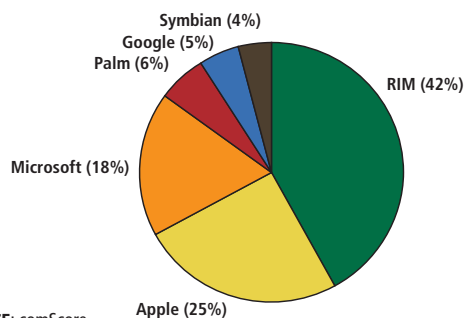
SOURCE: Pew Internet & American Life Project

SOURCE: "Online News Survey," Pew Internet & American Life Project, John Horrigan, Associate Director Research, 1615 L St. NW, #700, Washington, DC 20036; 212-419-4500; jhorrigan@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

**Cell Phone Owners Get Smart**

One in six cell phone owners (17%) had a smartphone as of December 2009, up from 11% in December 2008, reports comScore. Meanwhile, the proportion who have unlimited

**SMARTPHONE OPERATING SYSTEM MARKETSHARE, 2009**



SOURCE: comScore

data plans increased to 21%, up from 16% over the same period. Another 43% have 3G phones, up from 32%.

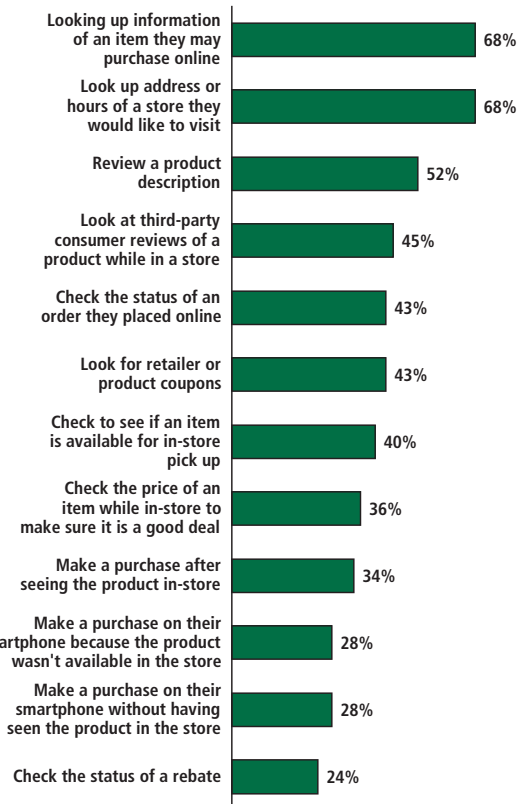
SOURCE: "mobiLens," comScore, Andrew Lipsman, Senior Analyst, 500 W. Madison, #2980, Chicago, IL 60661; 312-775-6510; alipsman@comscore.com; www.comscore.com. Price: Call for information.

**Smartphones Are For Shopping: Purchases, Price Checks & Reviews**

More than a third of smartphone owners (37%) have made a purchase from their devices, according to Compete. That number would be higher, except many shoppers abandon online shopping carts because the purchase process is not optimized for their phones, much like in the early days of e-commerce. Those who have abandoned sites most commonly did so because the site would not load (45%) and because the site was not specifically developed for smartphone users.

Those with Android phones (32%) and iPhones (29%) are more likely than those with Windows (15%), Blackberry (14%), or Palm phones (13%) to be willing to spend more than \$100 on a purchase from their phone.

**SHOPPING ACTIVITIES THAT SMARTPHONE OWNERS DO USING THEIR DEVICES, 2009**



SOURCE: Compete

SOURCE: "Smartphone Intelligence," Compete, Danielle Nohe, Senior Associate, 4 Copley Pl., #700, Boston, MA 02116; 617-933-5696; dnohe@compete.com; www.competeinc.com. Price: Call for information.

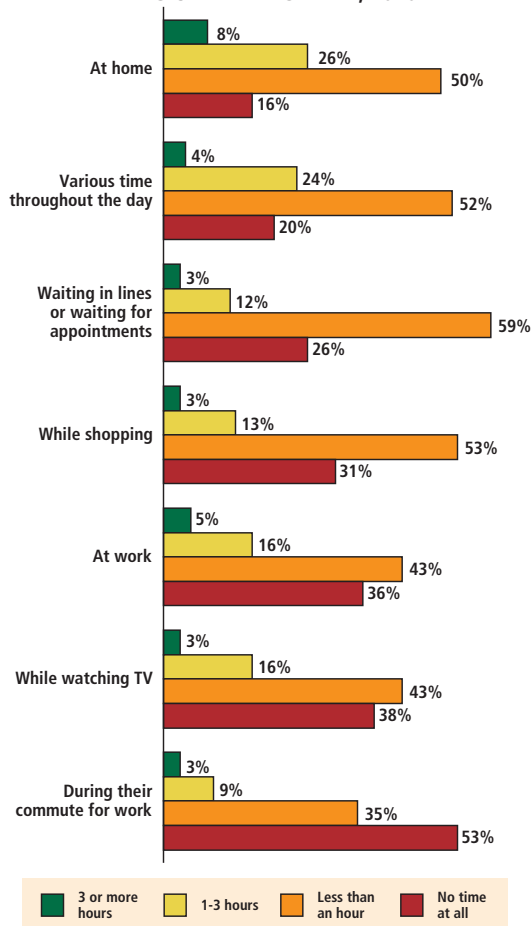
## Smartphones Are A Marketer's Window Into Owners' Days

Smartphones were introduced as a solution for busy, on-the-go professionals, but in 2010, 74% of smartphone owners primarily use their devices for personal reasons. They use them throughout the day: while at home, on their way to work, while at work, while shopping...

Smartphone owners always have their devices at hand, and a few are willing recipients of marketers' messages, including:

- ▶ Grocery coupons (36%);
- ▶ Barcodes they can scan on their phones (29%);
- ▶ Offers they can save and pursue at their leisure (26%);
- ▶ Movie theater offers/promotions (26%);
- ▶ Ads via SMS when they go by a retailer with a promotion (21%);
- ▶ Travel website coupons (20%);
- ▶ Ads within a free app (18%);
- ▶ Offers synched to their schedules (17%);

HOW MUCH TIME SMARTPHONE OWNERS SPEND WITH THEIR DEVICES IN A TYPICAL DAY, 2010



SOURCE: Compete

- ▶ Ads related to a search they conducted via a mobile browser (16%);
- ▶ Ads via SMS (15%).

SOURCE: "Mobile Marketing & Advertising," Compete, Danielle Nohe, Senior Associate, 4 Copley Pl., #700, Boston, MA 02116; 617-933-5696; dnohe@compete.com; www.compoteinc.com. Price: Call for information.

## Smartphones Are Media/Entertainment Devices

Nearly half of Americans (47%) who have a smartphone say that it is one of the three most valuable media and entertainment products, according to Deloitte. Overall, they rank the device as the fourth most valuable product, up from 10th a year ago Americans use their phones for:

- Texting (72%);
- Accessing the Internet (42%);
- Mobile online searches (30%);
- Downloading apps (27%);
- GPS directions (26%);
- Making purchases (15%); and
- Playing videogames (13%).

SOURCE: "State of the Media Democracy," Deloitte, Ed Moran, Director of Insights and Innovation, 2 World Financial Center, New York, NY 10281; 212-436-6839; emoran@deloitte.com; www.deloitte.com. Price: Call for information.

## It's The App That Makes The Smartphone

A fifth of adults (21%) had a smartphone in 2009, up from 14% in 2008, according to Nielsen Company. Some 14% of mobile subscribers downloaded an app to their phone in the prior month, and the average smartphone owner has 22 apps on his or her phone. iPhone users have the most apps on their phones (37, on average), followed by Adroid users (22), Palm users (14), Windows Mobile users (13), and BlackBerry users (10). Games are the most popular downloads — 65% of smartphone users have downloaded a game in the prior month — but they are not the most often used apps.

On iPhone, the most-used apps are:

- ▶ Facebook (58%);
- ▶ iPod/iTunes (48%);
- ▶ Google Maps (47%);
- ▶ Weather Channel (46%); and
- ▶ Pandora (27%).

On BlackBerry, the most-used apps are:

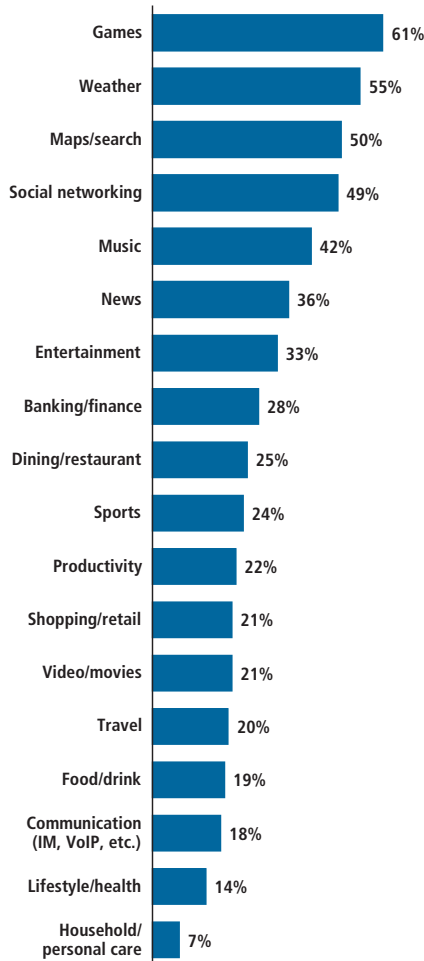
- ▶ Facebook (51%);
- ▶ Google Maps (35%);
- ▶ Weather Channel (28%);
- ▶ ESPN (19%); and
- ▶ Pandora (18%).

On Android, the most-used apps are:

- ▶ Google Maps (67%);
- ▶ Facebook (50%);
- ▶ Weather Channel (38%);

- ▶ Pandora (26%); and
- ▶ Google search (26%).

**APPS THAT SMARTPHONE OWNERS HAVE USED IN THE PRIOR 30 DAYS, BY CATEGORY, 2010**



SOURCE: Nielsen Company

SOURCE: "App Playbook," Nielsen Company, Chris Quick, Mobile Media Analyst, 700 Broadway, New York, NY 10003; 646-654-5000; www.nielsen.com. Price: Call for information.

## Games Are Most Popular App Category, But Facebook Is Top App

Smartphone owners have an average of 27 apps on their phone as of September 2010, up from 22 in December 2009, according to Nielsen Company. iPhone owners have the highest average number of apps at 40, followed by Android phone owners with an average of 25 apps, and Blackberry owners with an average of 14 apps.

Games are the most popular type of app, but the most commonly used app is Facebook: 50% of iPhone owners used the

social network app in the prior month, as did 45% of Android owners and 45% of Blackberry owners.

SOURCE: "Apps Playbook," Nielsen Company, Susan Whiting, Vice Chair, 770 Broadway, New York, NY 10003; 646-654-8499; susan.whiting@nielsenmedia.com; www.nielsen.com. Price: Call for information.

## Smartphones Assist Active Americans In Outdoor Activities

The most active Americans (MAAs) — defined as 2.8 million people who participate in sports and hobbies at an elite or enthusiast level — are more likely than Americans overall to own a smartphone (37% vs. 17%), according to Leisure Trends. Some 17% of MAAs have a Blackberry and 12% have an iPhone.

The vast majority (81%) uses their smartphones in relation to their outdoor activities, with 61% using them prior to, 50% during, and 57% after an outdoor activity. The 18% who do not use their smartphones related to such activities most commonly say it is because they are not likely to have a connection (46%).

**ASPECTS OF SMARTPHONE OWNERSHIP THAT THE MOST ACTIVE AMERICANS FIND VALUABLE, 2010**

Applications that are oriented toward their outdoor activities	50%
Outdoor-oriented product/service locator	37%
Outdoor product information	31%
Ability to receive special offers/coupons for outdoor products	18%
Ability to purchase outdoor products	15%

NOTE: Most Active Americans are defined as the 2.8 million people who participate in sports and hobbies at an elite or enthusiast level.

SOURCE: Leisure Trends

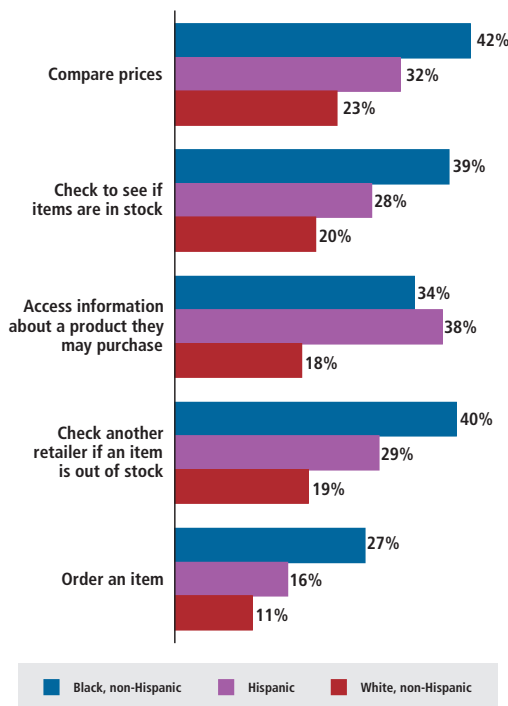
SOURCE: "Most Active Americans Panel 2010," Leisure Trends, 1680 38th St., #110, Boulder, CO 80301; 303-786-7900; jspring1@leisuretrends.com; www.leisuretrends.com. Price: Call for pricing information.

## Emerging Majorities Go Mobile For Communicating, Shopping

Mobile phones are an integral part of Hispanics' daily lives, according to eMarketer. They use them not only to communicate with their friends and family and maintain strong relationships, but also to manage their social lives. There are 15.2 million Hispanic mobile phone users in the U.S., according to comScore statistics cited by eMarketer. Of those, 51% are aged 18-34, compared to 36% of the Hispanic Internet population in that age group. Hispanic mobile users also skew male, with men accounting for 56% of mobile phone owners, compared to 51% of the Hispanic population.

Hispanics are more likely than Whites to use their mobile phones for shopping tasks, but less likely than Blacks to do so, according to Sterling Commerce research cited by eMarketer.

HOW MOBILE PHONE OWNERS USE THEIR DEVICES FOR SHOPPING ACTIVITIES, BY RACE/ETHNICITY, 2010



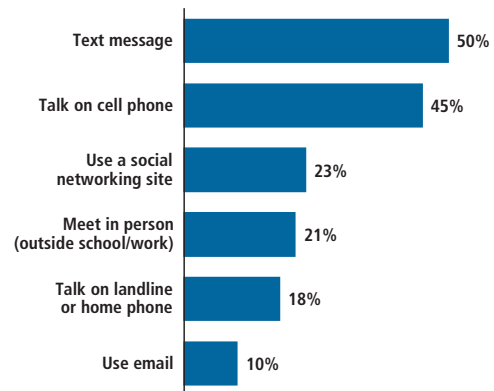
SOURCE: Sterling Commerce, as cited by eMarketer

SOURCE: "Hispanic Mobile Users and Usage," eMarketer, Lisa Phillips, Sr. Analyst, 75 Broad St., 32nd Fl., New York, NY 10004; 212-763-6010; lphillips@emarketer.com; www.emarketer.com. Price: \$695.

## Young Latinos Text, Call Friends Daily

Most young Hispanics aged 16-25 are in touch with their friends daily, most commonly by text message or cell phone calls, according to Pew Hispanic Center. Those who are foreign-born are significantly less likely than those who are

WAYS HISPANICS AGED 16-25 KEEP IN TOUCH WITH FRIENDS ON A DAILY BASIS, 2010



SOURCE: Pew Hispanic Center

native-born to text their friends daily (26% vs. 65%) and talk to friends via cell phone daily (29% vs. 55%). That is partly explained by the fact that foreign-born Hispanics are less likely than native-born Hispanics to have cell phones (70% vs. 84%).

SOURCE: "How Young Latinos Communicate With Friends In The Digital Age," Pew Hispanic Center, Gretchen Livingston, Senior Researcher, 1615 L St. NW, #700, Washington, DC 20036; 202-419-3600; glivingston@pewhispanic.org; www.pewhispanic.org. Price: Available online at no charge.

## Africans Keep In Touch With People In Their Home Countries

Africans living in the U.S. make most calls to their home country on Saturdays and Sundays, finds Rebtel. The largest share of calls (74%) is to family, 16% to friends, and 10% to business associates. Egyptians in the U.S. prefer iPhone to other devices, Ugandans prefer BlackBerrys, Zambians prefer Nokia devices, and Sierra Leoneans have an equal preference for Nokia and Samsung devices.

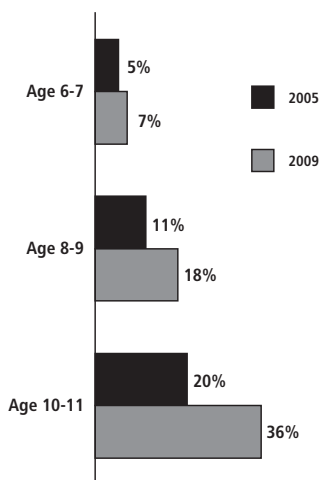
SOURCE: "Africans In U.S. Embracing Smartphones," Rebtel, Greg Spector, U.S. Representative; 415-717-4666; greg.spector@rebtel.com. Price: Available online at no charge.

## Where's The Little One? Stats Show 6-11-Year-Old Cell Owners On Rise

Some 20% of 6-11-year-olds owned a cellphone in 2009, up from 12% of children in 2005 according to MediaMark Research. Cellphone ownership among boys jumped 48% since 2007, while girls increased 17%. By age, the most dramatic increase in ownership over the past five years occurred among 10-11-year-olds.

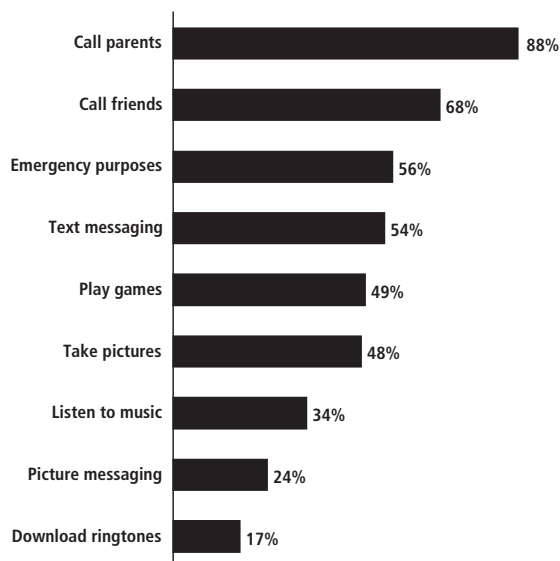
Most tweens use their phones for communication, such as calling parents (88%) and friends (68%). They are less likely to use them to download ringtones (17%) or listen to music (34%).

CELLPHONE OWNERSHIP, 2005 AND 2009, BY AGE



SOURCE: MediaMark Research

CELLPHONE ACTIVITIES AMONG 6-11-YEAR-OLDS



SOURCE: MediaMark Research

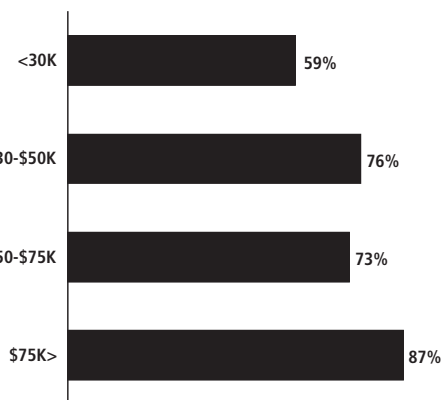
SOURCE: "American Kids Study," MediaMark Research, Anne Marie Kelly, SVP Marketing & Strategic Planning, 75 9th Ave., 5th Fl., New York, NY 10011; 212-884-9204; annemarie.kelly@mediamark.com; www.mediemark.com.

## Socioeconomic Status Is Key Factor In Likelihood Of Teens Owning Cells

There's little difference among gender, race, or ethnicity in regards to a teen owning a cellphone, but socioeconomic status does impact the likelihood of cellphone ownership, according to the Pew Internet & American Life Project. Fewer than six in 10 teens (59%) living in homes earning less than \$30,000 a year own a phone, compared to 87% of teens in homes with annual incomes exceeding \$75,000.

Similarly, teens living in homes earning more than \$75,000 are more likely than less-well-off teens to own a desktop or laptop computer.

TEEN CELLPHONE OWNERSHIP, BY FAMILY INCOME LEVEL



SOURCE: Pew Internet & American Life Project

SOURCE: Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

## Girls 12-24 Love Phones More Than PC

Girls 12-24 are more likely than women in general to own a smartphone (23% vs. 17%), according to Solutions Research Group. Its "Women & Digital Life" study finds teen and young adult women spend twice as much time using their cellphones each day as women over age 15 (2.8 hours vs. 1.2 hours). Comparatively, younger women spend significantly less time than their older counterparts using a PC computer each day (2.9 hours vs. 3.5 hours). Also:

- ▶ 85% of younger women have sent a text message in the past month, compared to 43% of women over 40;
- ▶ 53% of younger women have used the calendar on their wireless device to book an appointment or review their schedule, compared to 22% of women over 40.

- ▶ 49% frequently use their phone to watch TV, compared to 24% of women over age 40.
- ▶ Young women are four times as likely to visit social media sites, such as Facebook and Twitter, on their phones; and
- ▶ Three in four (74%) have taken a photo using their phone within the past month.

#### MOST IMPORTANT TECHNOLOGY IN LIFE, WOMEN 12-24 VS. WOMEN OVER 25

WOMEN 12-24	WOMEN OVER 25
1. Cellphone/smartphone	1. Internet
2. Internet	2. PC/computer
3. PC/Computer	3. Cellphone/smartphone
4. iPod	4. Messagin
5. Messaging	5. iPod

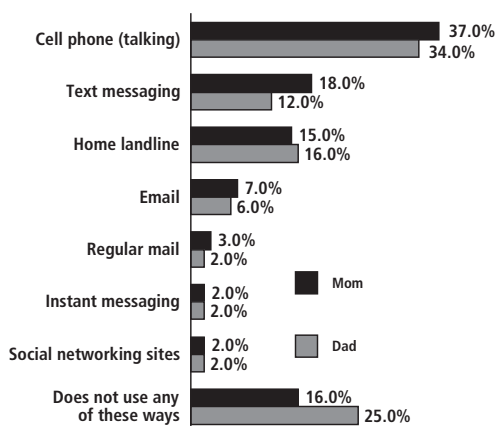
SOURCE: Solutions Research Group

SOURCE: "Women & Digital Life," Solutions Research Group, David Ackerman, Senior Director, 2200 Yonge St., #910, Toronto, ON Canada M4S 2C6; 866-358-5986; dackerman@srgnet.com; www.srgnet.com.

## Mom: Call Me On My Cell, Say Teens

Teens prefer to communicate with their parents when they aren't face-to-face by talking to them over a cellphone, according to CTR Consulting. Teens are also more likely to communicate with mom rather than dad in all forms of communication, except with the landline home telephone.

#### TEENS' PREFERRED METHOD OF COMMUNICATING WITH THEIR PARENTS, WHEN THEY AREN'T FACE-TO-FACE



SOURCE: GTR Consulting

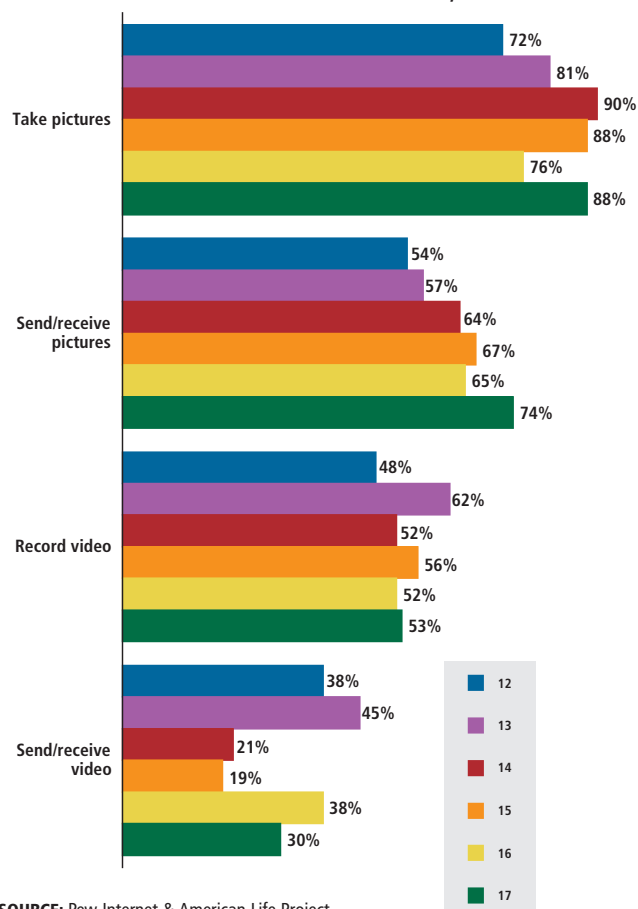
SOURCE: CTR Consulting, Gary Rudman, President, 30 Liberty Ship Way, #3320, Sausalito, CA 94965; 415-713-7852; gary@gtrconsulting.com; www.gtrconsulting.com.

## Smartphone Habits Among Teens

Those aged 12 and 13 are more likely than older teens to send and receive video via their smartphone, according to the Pew Internet & American Life Project.

There seems to be no discernable pattern in their smartphone habits, except that their usage for taking pictures dips when they are 16

#### SELECT SMARTPHONE ACTIVITIES, BY AGE



SOURCE: Pew Internet & American Life Project

SOURCE: Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

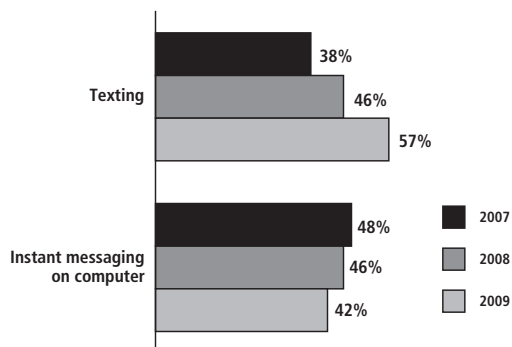
## Teens Embrace Texting As Way Of Life, But Instant Messaging Takes A Dive

Nearly eight in 10 teens (78%) believe "text messaging is an important part of my daily life," according to Mediamark Research and Intelligence. In fact, those who regularly text to communicate increased 50% between 2007 and 2009.

Teens primarily text to connect with family and friends and typically are multi-tasking while doing so. Three in four (75%) text while watching TV. One in five (20%) have used text messaging to vote in contests.

As texting increases in popularity, instant messaging via a computer is losing favor with teens, declining 13% since 2007.

**TEENS COMMUNICATION METHODS, 2007-2009, USAGE WITHIN THE PRIOR 30 DAYS**



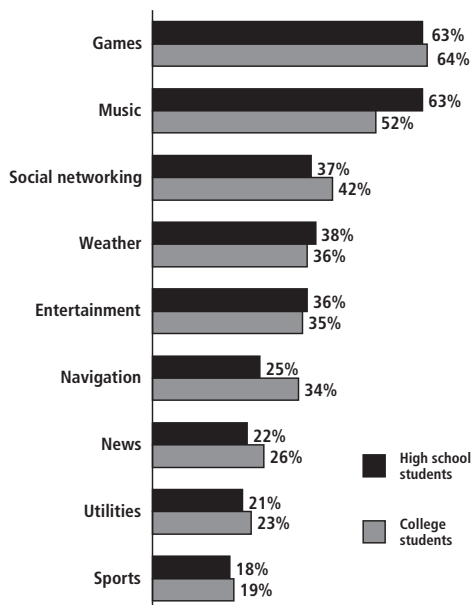
SOURCE: Mediamark Research and Intelligence

SOURCE: MediaMark Research, Anne Marie Kelly, SVP Marketing & Strategic Planning, 75 9th Ave., 5th Fl., New York, NY 10011; 212-884-9204; annemarie.kelly@mediamark.com; www.mediemark.com.

### App Yours: Some Will Pay, Some Demur

High school and college students are willing to pay an average \$3 per mobile application, according to YPulse Research, though one in three are not willing to pay anything. Price (77%) is the top consideration when deciding to

**TOP APPS DOWNLOADED BY HIGH SCHOOL AND COLLEGE STUDENTS, 2009**



SOURCE: YPulse Research

download an application, followed by ease of use (49%), features received for the price (41%), familiarity of the application (38%), ratings of others (34%), appeal of the product description (34%), and the application's ability to interact with others (15%).

SOURCE: YPulse Research, Dan Coates, President, 130 William St., 6th Fl., New York, NY 10038; 888-292-8855, x2; dan@ypulse.com; www.ypulse.com.

### Teens Continue To Text— A Lot

One in three teens sends more than 100 text messages a day, or 3,000 a month, according to the Pew Internet & American Life Project. One in six (15%) sends at least 200 texts a day. Girls typically send and receive 80 texts a day, while boys send and receive 30. Girls are also more likely than boys to text for social reasons (59% vs. 42%), have long exchanges regarding personal matters (84% vs. 67%), and discuss school work (76% vs. 64%).

Considering the large number of daily text messages that teens send and receive, it's not surprising to find teens on unlimited plans and not responsible for the monthly bills. Three in four (75%) are on plans with unlimited texting and 69% are part of a family plan. Two in 10 (18%) are part of a prepaid or pay-as-you-go plan, and 10% have their own individual contracts. Black teens living in low income households are most likely to have self-financed prepaid plans.

Nearly all parents (98%) have given their teen a phone so they can stay connected. However, parents are monitoring their teen's phone. Two in three (64%) scroll through messages and call lists, half (46%) limit the number of minutes their teens can use the phone, and 52% set time limits on daily usage. Half (48%) use the phone to monitor their teen's location and an additional 62% have taken away the phone

**TEEN CELL PHONE ACTIVITIES, 2010**

Take pictures	83%
Share pictures with others	64%
Play music	60%
Play games	46%
Exchange videos	32%
Exchange instant messages	31%
Surf the Internet	27%
Access social network sites	23%
Email	21%
Purchase items	11%

SOURCE: Pew Internet & American Life Project

**'NEGATIVE' TEEN CELL PHONE BEHAVIORS, ACTIVITIES, 2010**

Received spam/unwanted text	54%
Talked on phone while driving	52%
Texted on phone while driving	34%
Used phone to bully/harass	26%
Received sexually suggestive text message	15%
Sent sexually suggestive text message	4%

SOURCE: Pew Internet & American Life Project



as punishment. Parents of girls age 12-13 are most likely to monitor behavior.

Teens aren't only texting and talking on their phones. Two in 10 (21%) who typically don't go online access the Internet via their cell phone. Black (44%) and Hispanic (35%) teens are more likely to do this than are White teens (21%).

Notably, 30% of teens are uninterested in owning a cell phone, a finding directly related to having a cell-less parent. There's no significant difference among different genders, ages, or past ownership in desire to be a current cell phone owner. Of the 30% of teens that do not cite expense as the top reason they do not own a phone now, 27% say it was taken away by their parents, and 22% admit to breaking it and being unable to afford a replacement.

**SOURCE:** Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; [www.pewinternet.org](http://www.pewinternet.org).

## factoids

- The vast majority of **drivers** have used their cell phones to talk, text, or surf the Web while driving, and 72% admit they continue to do so despite state bans of such activities. (*cellcontrol*; phone: 225-215-0079)
- More than half of Americans (53%) plan to buy a new **mobile phone** in the next six months; the features they would most like their new phone to have are a touch screen (29%) and a QWERTY keyboard (23%). (*TNS*; phone: 212-991-6194)
- A quarter of Americans with **Internet-ready cell phones** (25%) have never used their devices to go online, compared to 17% who use their phones to go online daily. (*Volantis*; phone: 425-449-4300)
- The average number of minutes a **prepaid cell phone** user spends talking on the phone each month jumped to 667, up 147% since 2006. (*PricewaterhouseCoopers*; phone: 646-471-3229)
- The average cell phone owner sends 584 **text messages** per month, more than double the 218 they sent per month in 2007. (*In-Stat*; phone: 480-483-4473)
- More than half of **smartphone owners** (57%) are disappointed with their device's performance, but 55% aren't sure whether it is the fault of the device manufacturer or the service provider. (*Fanfare*; phone: 705-484-5105)

### WIRELESS TECHNOLOGY CONSUMERS WANT IN THEIR HOMES, 2010

Ability to play music on speakers throughout their home	74%
Ability to watch movies or TV on any screen in their home	74%
Connect to a printer wirelessly	71%
Sync an MP3 player with a computer without the use of a docking station	54%

SOURCE: Wi-Fi Alliance; phone: 512-305-0790

- Nearly half of cell phone owners (46%) visit their service provider's retail location to **upgrade or replace their phone**. (*J.D. Power & Associates*; phone: 248-312-4119)
- One in 10 cell phone owners (10%) use **location-based services** on their device at least once a week, most frequently to locate nearby points of interest, shops, or services. (*Mobile Marketing Association*; phone: 408-242-5733)
- Young adults aged 18-24 would **answer a text** while eating (49%) or during a meeting (22%), while those aged 25 and older are less likely to do so, with only 27% willing to answer a text during a meal and 17% during a meeting. (*Retrovo*; email: paul@retrovo.com)
- Cell phone owners are more likely to use their devices to **take pictures** (76% in 2010, up from 66% in 2009) than to send text messages (72%, up from 65% in 2009). (*Pew Internet & American Life Project*; phone: 202-419-4500)

- If it cannot be done face-to-face, most people believe **personal announcements** — such as a major change in relationship status (78%) or a promotion at work (71%) — should be done over the phone, rather than via email or social networking site. (*GolinHarris for VTech*; phone: 213-438-8710)
- Those shopping for a new **wireless phone** are twice as likely to have decided to buy a new device because they want additional features (45%) as because of a release of a new phone they “just had to have” (22%). (*Compete*; phone: 617-933-5696)
- Of the 48% of Americans who have received a promotional **text message** for a product or service, 29% have purchased the advertised item. (*e-Dialog*; phone: 508-451-5944)
- Four in 10 smartphone owners who use apps (40%) refer to their apps when making a **shopping decision**, and 32% say they are more likely to buy from a company that advertises in an app than one that does not. (*Knowledge Networks*; phone: 908-497-8040)
- A quarter of cell phone owners (25%) will access a **mobile website** in the coming year; most commonly, they will visit weather sites (69%), mobile search sites (60%), and social networking sites (50%). (*Mobile Marketing Association*; phone: 408-242-5733)
- Nearly a third of smartphone owners (31%) would like a **personal health app** for their phone that allows them to track their physical condition, and 40% would be willing to pay to have that information sent directly to their doctor. (*PricewaterhouseCoopers*; phone: 617-530-4185)
- **BlackBerry** phone owners (19%) are more likely to have had their phone chosen for them by their workplace than are iPhone or Android users (4%); only 30% would buy another BlackBerry for their next phone, compared to 70% of iPhone and Android users who would stick to their brand. (*CrowdScience*; phone: 650-625-9721, x219)
- More than four in 10 parents (41%) believe that **texting** makes them closer to their children. (*LG Electronics*; phone: 707-328-5307)
- In 2009, 6.5% of children aged 6-7 had a **cell phone**, as did 17.7% of those aged 8-9, and 36.1% of those aged 10-11. (*Mediamark Research & Intelligence*; phone: 212-884-9204)
- Two thirds of mobile phone owners are interested in having a **navigation application** on their device that provides directions for both driving and walking. (*Source: Navteq*; phone: 312-894-7614)
- Six in 10 18-34 year olds (60%) have **texted** someone while talking to another person, compared to 24% of those aged 35 and older. (*Survey Sampling International*; phone: 203-567-7230)
- The vast majority of college students (85%) respond to **text messages** immediately at least half of the time. (*mtvU*; phone: 212-846-8852)

- ▶ The 93% of Americans with **cell phones** collectively spent 2.26 trillion minutes talking on their devices in the first half of 2010, up 1% from the prior year; they sent 1.8 trillion text messages, up 33%; and they sent 56.3 billion multimedia messages, up 187%. (*CTIA The Wireless Association; phone: 202-736-3207*)
- ▶ More than a quarter of Americans (27%) have ever downloaded an **app**, a proportion that rises to 67% among smartphone owners. (*Euro RSCG; phone; 212-367-6817*)
- ▶ Nearly six in 10 **mobile phone owners** (59%) plan to use their devices to shop for Christmas and Hanukah gifts and plan holiday celebrations — excluding phone calls — in 2010. (*Mobile Marketing Association; phone: 408-242-5733*)
- ▶ Adults with college degrees (20%) are more likely than those with high school diplomas (14%) or less than a high school education (12%) to be living in a household that made and received all or almost all calls on a **wireless phone**. (*Source: Centers For Disease Control & Prevention; phone: 301-458-4107*)
- ▶ Six in 10 Americans (60%) have **noticed an ad** that allows for a mobile response — such as a text reply — and 39% have seen one in the prior week. (*Mobile Marketing Association and Luth Research; phone: 408-242-5733*)

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#### AMERICANS' ATTITUDES TOWARD MOBILE COUPONS, 2009

Are/would be comfortable storing mobile coupons on their phones 10%  
 Are comfortable receiving coupons on their mobile phones . . . . .7%  
 Would use more coupons more often if they could access  
 them on their mobile phones . . . . .6%  
 Want to hear about deals or sales from retailers via text message . .5%

**SOURCE:** Honeywell Scanning & Mobility; phone: 856-374-5781

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# online

More than two thirds of Americans have access to the Internet from home, and most of those have a high-speed broadband connection. High-speed connections are more common as income rises, and less common as age rises.

For most Americans, their first online destination of the day is checking email. About one in 10 first visit a social network, revealing how integral social media has become in Americans' lives. Americans spend the greatest proportion of the online computer time on social media. On their mobile devices, they spend the greatest proportion of online time with email, followed by web portals and social media.

As Americans spend more time on social media sites, their use of such sites has extended from keeping in touch with friends to "liking" brands and sharing product and brand opinions.

Many also use their social media connection with brands to find out about deals and new products. While they welcome interaction with brands in the social media space, brands must be careful to remain relevant to their audience and not spam their fans.

Gaming is also a key aspect of social media, with many users buying and selling virtual goods — for both real and virtual currency — on these sites. Women and youth are avid social gamers.

Hispanic Internet use is slowly catching up to that of the rest of the population. For Hispanics, their ability to speak and read English is the most significant factor in their use of the Web. They often prefer to use English-language websites because they have more information and are more comprehensive than Spanish-language websites. Among those who use the Internet, Hispanics name shopping as their favorite online activity.

Teens go online frequently, with most accessing the web daily. They most commonly visit Facebook. As teens grow into adulthood, they continue to communicate with friends online, but their online destinations expand to include more shopping sites.

Online safety and bullying is a concern among both high school and college students.

## Demographic Differences Predict Broadband Access For Households

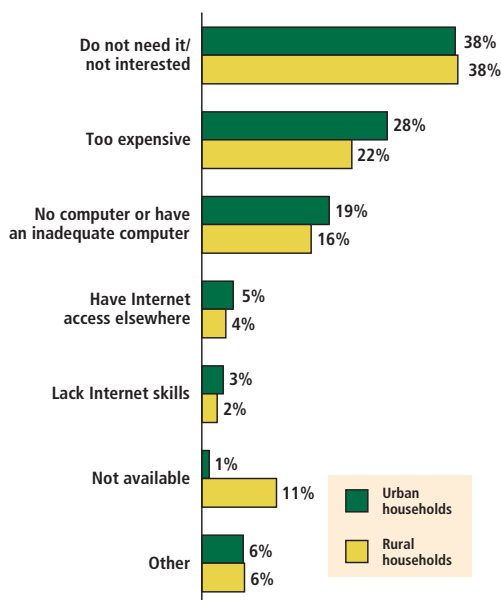
More than two thirds of Americans (68.7%) had access to the Internet in 2009, up from 61.7% in 2007. That includes 63.5% who have broadband access, up from 50.8% over the same period, according to the National Telecommunications and Information Administration, a division of the Department of Commerce, and the U.S. Census Bureau.

Broadband access is demographically predictable. The greater its income, the greater likelihood that a household will have broadband. Fewer than 50% of households with annual incomes under \$35,000 have broadband, compared to more than 75% of those with annual incomes of \$75,000 or more.

Americans aged 18-24 (81%) are the most likely to have broadband access, whereas those aged 55 and older (46%) are the least likely. Those aged 25-54 hover around 67%. More than half of urban household have broadband, compared to 39% of rural households. There is no difference by gender: 59% of men and women have broadband. These demographic trends mirror those of 2007.

The primary reasons households give for not having broadband access at home also varies. Both rural and urban households without broadband most commonly say they are not interested in having it, but urban households are more likely than rural households to say the service is too expensive, whereas rural households are more likely to say the service is unavailable.

PRIMARY REASON HOUSEHOLDS DO NOT HAVE BROADBAND INTERNET ACCESS, RURAL VS. URBAN, 2009



SOURCE: National Telecommunications and Information Administration and the U.S. Census Bureau

SOURCE: "Digital Nation: 21st Century America's Progress Toward Universal Broadband Internet Access," U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

## Most Americans Start Their Mornings With Email

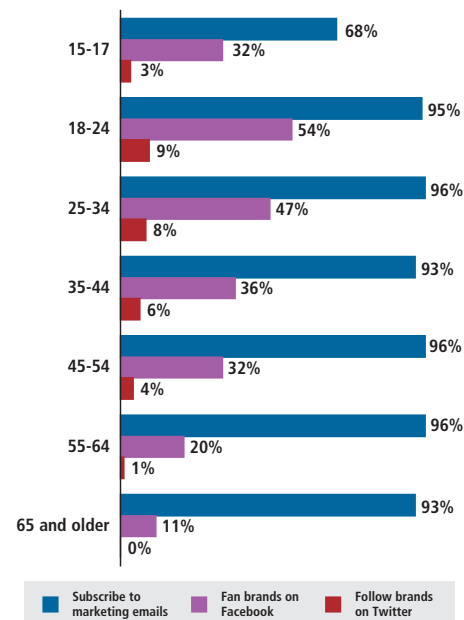
For 58% of Americans, email is their first online destination of the day, reports ExactTarget. That is more than twice the proportion whose first stop is an online portal or social networking site.

Those who first turn to email in the morning are more likely than average to check their email throughout the day. They want utilitarian information from companies via email, such as product info or promotions. Nearly four in 10 (39%) use Facebook daily, and their interest in interacting with brands on the site is similar to email; they are not looking for entertainment, but rather information.

Those who visit Facebook first thing in the morning are social in their interest in brands online. They like to be entertained by brands and want to support them via social networking sites. They are similar to email-first consumers in that both groups primarily subscribe to branded emails to learn about promotions and deals.

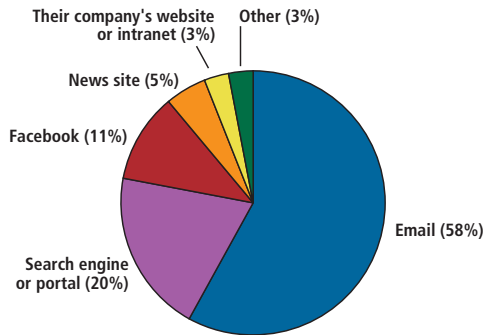
Some 88% of Americans use email every day, and 93% have subscribed to receive email marketing messages from a company. By comparison, 42% visit Facebook daily, with 69% of those having friended at least one brand. Only 5% use Twitter, but 68% of daily users follow at least one brand.

AMERICANS WHO RECEIVE BRAND EMAILS, FAN BRANDS ON FACEBOOK, AND FOLLOW BRANDS ON TWITTER, BY AGE, 2010



SOURCE: ExactTarget

AMERICANS' FIRST ONLINE DESTINATION OF THE DAY, 2010



SOURCE: ExactTarget

SOURCE: "Digital Morning," ExactTarget, Morgan Stewart, Director Research Strategy, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; mstewart@exacttarget.com; www.exacttarget.com. Price: Available online at no charge.

## Location-Based Social Media Attract Young, Affluent Users

Location-based social applications, such as foursquare and Gowalla, have gained the attention of the media for their entertainment and marketing value, though only 16% of Americans are aware of them, according to Forrester Research. Only 4% have ever used such applications, 3% know of them because their friends use them, and 9% have heard of them but never used them.

Location-based social apps allow users to "check in" to locations online, find friends who are nearby, and communicate with people in the same area. In some cases, they can also earn points and redeem discount offers.

As with other social media, young Americans are leading the way with location-based apps: Gen Yers (aged 18-29) account for 44% of users, though only 22% of the U.S. population, and Gen Xers account for 42% of users, but only 25% of the population. Users are also more likely than average to be male (78% vs. 49% of the U.S. population), wealthy (average annual household income of \$105,000 vs. \$79,500 for the U.S. overall), and educated (70% have a college degree, vs. 51% of the U.S. overall).

Location-based app users are more likely than average to use their cell phone to research information before making decisions, such as:

- ▶ Choosing what movie to see or restaurant to go to (27% vs. 7%);
- ▶ Choosing a financial investment, such as a stock or mutual fund (23% vs. 3%); and
- ▶ Buying a big-ticket item, such as a TV, refrigerator, or car (21% vs. 3%).

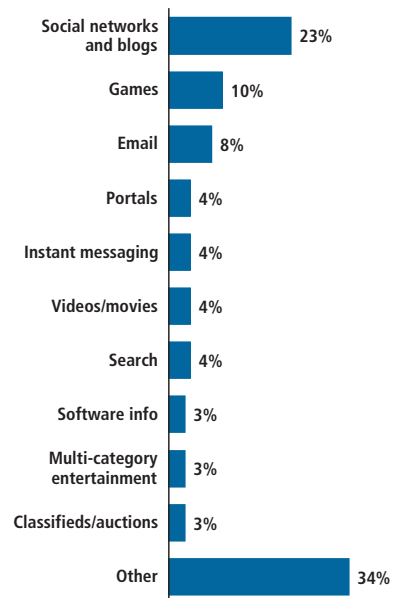
SOURCE: "Location-Based Social Networks," Forrester Research, Melissa Parrish, Analyst, 400 Technology Sq., Cambridge, MA 02139; 617-613-6000; mparrish@forrester.com; www.forrester.com. Price: Call for information.

## Americans Spend More Time On Social Nets Than Other Websites

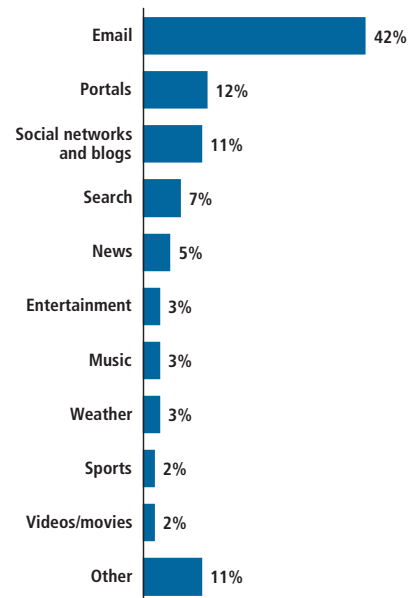
Americans are spending a greater portion of their time online via PC or laptop visiting social networks, such as Facebook, according to Nielsen Company. Time spent social networking is up 43% compared to 2009. Meanwhile, time spent using email is down 28%, use of portals is down 19%, and use of instant messaging is down 15%, suggesting that

HOW AMERICANS SPEND THEIR TIME ONLINE, 2010

### VIA PC/LAPTOP



### VIA MOBILE DEVICE



SOURCE: Nielsen Company

social networking may be filling the role formerly held by those sites and services.

People are also spending more time watching videos and movies (up 12%) and playing online games (up 10%).

The way Americans spend their time online via mobile devices differs significantly. They spend 42% of their mobile online time accessing email, up from 37% in 2009. Social networking accounts for 11%, up from 8%, whereas visiting portals accounts for 12%, down from 14%. Reading headlines remains popular, with news accounting for 5% of time spent on the mobile Web.

**SOURCE:** "What Americans Do Online," Nielsen Company, Susan Whiting, Vice Chair, 770 Broadway, New York, NY 10003; 646-654-8499; susan.whiting@nielsenmedia.com; www.nielsen.com. Price: Call for information.

## Americans Are Skeptical Of Information Posted Online

Americans spend an average of 13.2 hours a week online (excluding email), only slightly less time than they spend watching TV (14.0 hours), according to Fleishman-Hillard. They are more likely to cite the Internet (23%) than TV (14%) an "absolutely essential" or "extremely important" medium.

However, Americans are rather distrustful of a variety of information they find online. Of those who seek others' advice or opinions when making a decision, a minority find comments posted to websites and blogs trustworthy or valuable. Despite their wariness of other Web users, 51% think it is safe to buy and sell items over the Internet. Nearly half (49%) say it is safe to communicate with others via the Internet.

More than a quarter (27%) distrust the information companies post online, a slightly higher proportion than distrusts online information from the government (24%). Microblogs — such as Twitter feeds — can improve a company's image online for some Americans, with 22% saying

they are more trusting of companies with a microblog. In addition, the vast majority of Americans (72%) would be glad if a company responded to a message they posted to their microblog because it would show the company is listening to them. However, 22% would feel that companies were spying on them and violating their privacy, and 19% would believe the response was just for show and the company would take no real action.

**SOURCE:** "Digital Influence Index," Fleishman-Hillard, Brian McRoberts, SVP Digital Research Group, 200 N. Broadway, St. Louis, MO 63102; 314-982-8795; brian.mcroberts@fleishman.com; www.fleishmanhillard.com. Price: Call for information.

## Women And Men Are Online Equals, But Shop Differently

Over the past 10 years, women aged 18 and older have achieved parity with men online, accounting for 50% of the Internet audience, according to comScore. The vast majority of both women (85%) and men (83%) visit retail websites, but the types of sites they use and what they buy varies.

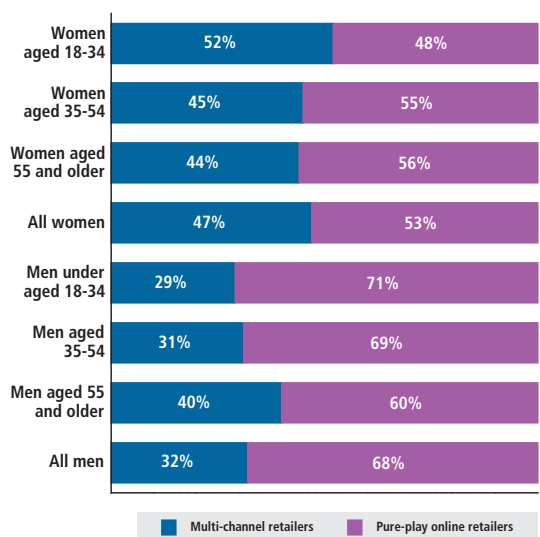
Women account for a greater share of online spending on:

- ▶ Apparel, accessories, and jewelry (71% of spending by women, 29% by men);
- ▶ Home and living (62% vs. 38%);
- ▶ Books, music, and video (61% vs. 39%); and
- ▶ Toys and hobbies (67% vs. 33%).

Men account for a greater share of online spending on:

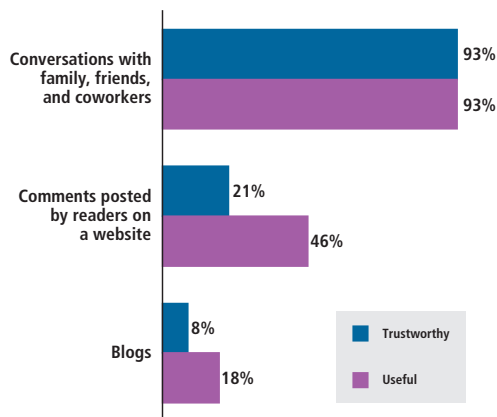
- ▶ Event and movie tickets (56% of spending by men, 44% by women);
- ▶ Flowers, greeting cards, and gifts (54% vs. 46%); and
- ▶ Electronics and computing (51% vs. 49%).

### HOW MEN AND WOMEN DIVIDE THEIR SPENDING ONLINE, MULTI-CHANNEL RETAILERS VS. PURE-PLAY ONLINE RETAILERS, 2010



**SOURCE:** comScore

### SOURCES OF INFORMATION AMERICANS FIND TRUSTWORTHY AND USEFUL, 2010



**SOURCE:** Fleishman-Hillard



Women, particularly those under age 34, devote a greater share of their shopping dollars than men do to multi-channel stores — those that have physical locations and well as an online retail outlet — as opposed to pure-play online retailers, such as Zappos and Amazon. Conversely, older men are more likely than their younger counterparts to devote a greater share of dollars to multi-channel retailers.

**SOURCE:** "Women On The Web: How Women Are Shaping The Internet," comScore, Andrea Vollman, Sr. Marketing Manager, 500 W. Madison, #2980, Chicago, IL 60661; 312-775-6646; avollman@comscore.com; www.comscore.com. Price: Available online at no charge.

## Women At Work Devote A Portion Of Their Day To Online Shopping

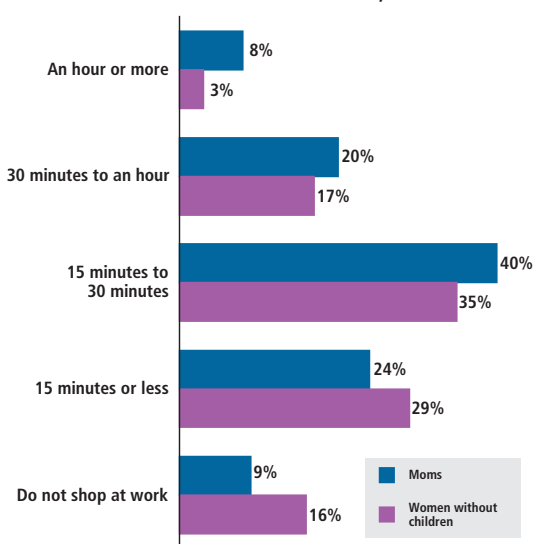
Four in 10 women (40%) spend as much time shopping online as they do in stores, and 28% shop more online than they do in stores, according to AOL and OTX. Of those who shop online, 40% do so while at work, including 51% of women aged 18-34 and 37% of women aged 35-54.

More than half of women who shop while at work (53%) do so because it saves time and is convenient. They also shop while at work:

- ▶ To pass the time (40%);
- ▶ Because they need an item "now" (38%);
- ▶ Because they have more downtime at work (35%); and
- ▶ Because they have no time to do so at home (20%).

Women aged 18-34 and 35-54 (69% each) are equally likely to say the primary motivator to shop online at work is a need for a specific item. The younger set is more likely than their older counterparts to shop out of boredom (60% vs. 33%) and because they see an online ad that is relevant to them (31% vs. 23%).

AMOUNT OF TIME WOMEN SPEND SHOPPING ONLINE IN A TYPICAL WORK DAY, 2010



**SOURCE:** AOL and OTX

Seven in 10 women (70%) subscribe to email notifications from retailers or brands. Six in 10 women (60%) have responded to an email offer by making a purchase, compared to 35% who have bought an item as the result of a TV commercial, 30% because of an online ad, 30% because of a direct mail offer, and 28% because of a newspaper circular.

**SOURCE:** "The Mall Behind The Spreadsheet," AOL, Liz Bloom, Sr. Manager Market Research, 770 Broadway, New York, NY 10003; 212-206-4400; www.aol.com. Price: Available online at no charge.

## Online Attitudes Of U.S. College Students

On a typical day, a third of college students (33%) spend six or more hours online via computer, cell phone, gaming console, or other electronic device, according to mtvU and the Associated Press. Most students (54%) think the Internet has made it easier to feel close to people, compared to 28% who think it has made it harder. Most have used technology to avoid having a face-to-face conversation with someone, including 51% who do so at least "moderately often."

Among their most common online activities, college students check email and social networking sites, though few have embraced Twitter as a weekly activity.

ACTIVITIES COLLEGE STUDENTS HAVE DONE ONLINE IN THE PRIOR WEEK, 2010

Sent or checked email	93%
Used MySpace, Facebook, or another social networking site	90%
Got news or information about movies, TV shows, music groups, or sports stars	75%
Got information or news about current events or politics	69%
Read or posted comments on a website	66%
Sent or received an instant message	64%
Watched clips of TV shows	51%
Watched full episodes of TV shows	50%
Shopped online	42%
Read other people's blogs	41%
Played a game	37%
Participated in an online video chat using a webcam	31%
Wrote or updated a blog for others to read	23%
Uploaded or shared videos that someone else made	23%
Posted updates or links on Twitter	19%
Uploaded or shared videos that they made themselves	16%

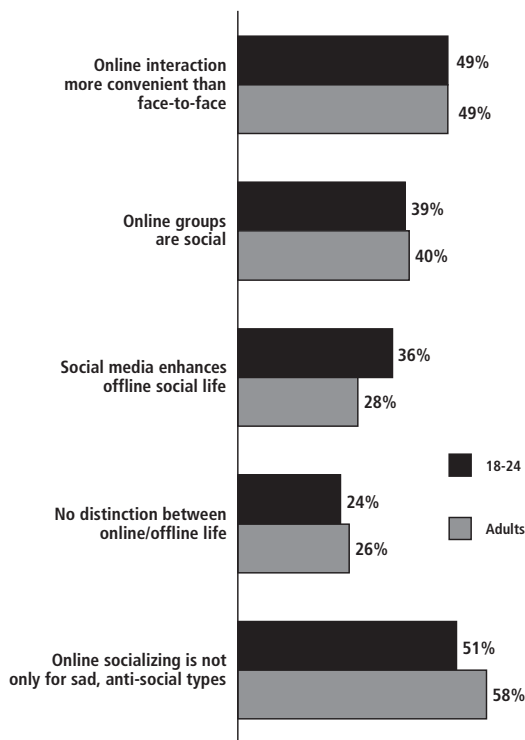
**SOURCE:** mtvU

**SOURCE:** "Technology & Mental Health Poll," mtvU, Janie Gatti, 1515 Broadway, New York, NY 10036; 212-846-8852; janice.gatti@mtvstaff.com; www.mtvu.com.

## Young Adults Not So Different Than Older Generation In Online Attitudes

Despite the myth that young adults are exhibitionists and willing to post photos online, those aged 18-24 are actually less likely than those aged 25-34 (50%), 35-44 (40%), and 45-54 (47%) to be more provocative and open online than in

**HOW INTERNET USERS FEEL ABOUT ONLINE SOCIAL INTERACTIONS, YOUNG ADULTS VS. OLDER ADULTS**



SOURCE: Euro RSCG Worldwide

person, according to Euro RSCG Worldwide.

Nearly half of 18-24 year olds (48%) have used the Internet to meet new people, nearly the same percentage as adults (49%) who have done the same. Young adults are slightly less likely than adults in general to have written negative comments about a company or their brand online (17% vs. 20%).

Nevertheless, there's little age difference in how Internet users feel about online social interactions. Both younger and older adults feel there's no distinction between online and offline lives, and the same percentage feel online interactions are more convenient than face-to-face.

SOURCE: Euro RSCG Worldwide, Jamie Bernheim, Marketing Manager, 200 Madison Ave., New York, NY 10016; 212-367-6865; jamie.bernheim@eurorscg.com; www.eurorscgpr.com.

**Most Shoppers Research Purchases Online**

The vast majority of online adults (78%) have researched a product or service online, and 32% have posted comments or reviews online, according to Pew Internet & American Life Project. On a typical day, 28% research products and services online in 2010, up from 19% in 2007.

Men (77%) and women (79%) are nearly equally likely to research purchases online. There is also little difference by

age: 77% of 18-29 year olds, 80% of 30-49 year olds, and 81% of 50-64 year olds perform online research; however, fewer of those aged 65 and older (68%) do so.

Those with broadband access (83%) are significantly more likely than those without (67%) to research purchases online. English speakers (79%) are also much more likely than Spanish speakers (53%) to do so [Ed: This difference may be related to the limits of retailers' Spanish-language sites rather than a lesser interest in researching products online, as well as fewer online Hispanic households].

Similar trends exist among those who review products and services online. Men (31%) and women (33%) are nearly equally likely to do so. English-speaking users (34%) are more than twice as likely as Spanish-speaking users (15%) to post online reviews. Those with broadband access (35%) are twice as likely as those without (17%) to post reviews.

There is less difference in product review posts by age, with 33% of 18-29 year olds having done so, as well as 35% of 30-49 year olds, 30% of 50-64 year olds, and 31% of those aged 65 and older.

SOURCE: "Online Product Research," Pew Internet & American Life Project, Jim Jansen, Senior Fellow, 1615 L St. NW, #700, Washington, DC 20036; 202-419-4500; jjansen@acm.org; www.pewinternet.org.

## Blacks And Hispanics See Value In Internet, But Don't Go Online Often

Blacks and Hispanics recognize the benefits of Internet access, such as giving them greater access to the world (92%), making it easier to find jobs (83%), and helping students achieve better grades (79%), according to the Internet Innovation Alliance and Brilliant Corners Research. However, fewer than half of Blacks and Hispanics (42%) regularly use the Internet, 30% use it occasionally, and 28% use it infrequently.

Those who have Internet access most commonly go online:

- ▶ At home (71%);
- ▶ At work (22%);
- ▶ At a library (11%);
- ▶ Via a mobile device (8%);
- ▶ At school (7%); and
- ▶ At an internet cafe (2%).

As for what would make it easier for them to be online, most cite a higher speed connection (18%), followed by a

free (10%) or cheaper (7%) connection. Some 3% would like the Internet to be more user-friendly, and another 3% would like improved security.

**SOURCE:** "Minority Internet Use," Internet Innovation Alliance, Bruce Mehlman, PO Box 19231, Washington, DC 20036; 866-970-8647; bruce@internetinnovation.org; www.internetinnovation.org. Price: Call for information.

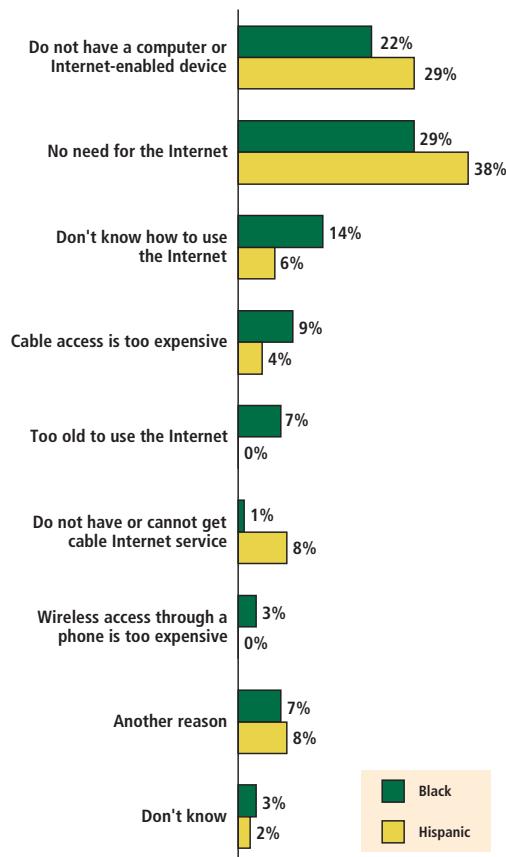
## Foreign-Born, English-Speaking Hispanics Flock To The Internet

64% of Hispanics were online as of December 2008 — the most recent year for which data are available — up from 54% in 2006, according to the Pew Hispanic Center. Hispanics online surpassed Blacks online; 63% of Blacks were online in 2008, up from 61% in 2006. Whites continue to lead online adoption, with 76% online in 2008, up from 72%.

More than three quarters of U.S. born Hispanics (77%) are online, compared to 52% of foreign-born Hispanics. However, foreign-born Hispanics are a faster-growing audience, up 12 percentage points since 2006, compared to an increase of two percentage points for U.S.-born Hispanics.

Their ability to read English also has a significant effect on Hispanics' Internet adoption, while their ability to read Spanish has little correlation with their use of the Internet.

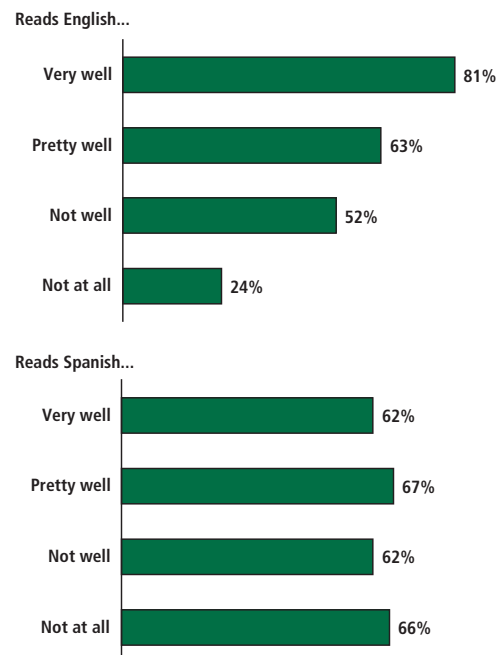
REASONS BLACKS AND HISPANICS DO NOT HAVE INTERNET ACCESS, BY RACE/ETHNICITY, 2009



NOTE: Of those without Internet access.

SOURCE: Internet Innovation Alliance and Brilliant Corners Research

HISPANIC INTERNET ADOPTION BASED ON ABILITY TO READ ENGLISH VS. ABILITY TO READ SPANISH, 2008



SOURCE: Pew Hispanic Center

**SOURCE:** "Latinos Online: Narrowing The Gap," Pew Hispanic Center, Rakesh Kochhar, Associate Director Research, 1615 L St. NW, #700, Washington, DC 20036; 202-419-3600; rkochhar@pewhispanic.org; www.pewhispanic.org. Price: Available online at no charge.

## Hispanics Have High-Speed Internet, Embrace It As Info Source

Nearly three quarters of Hispanics (72%) have a computer at home, and 89% of those have an Internet connection for their machine, according to Univision and the Associated Press. Most Hispanics with an Internet connect go online via a cable modem (54%), 32% use a DSL modem, and 11% use dial-up.

More than four in 10 Hispanics (43%) spend an hour or more a day on English-language Internet sites. Far fewer (24%) spend an hour or more a day on Spanish-language Internet sites.

The Internet plays an important role when Hispanics seek information — they most commonly cite it as their go-to source when researching a major appliance purchase or vehicle purchase, and it is the second most common source for information about their family’s country of origin.

**HISPANICS’ PRIMARY MEDIA SOURCES WHEN SEEKING INFORMATION, 2010**

	SPANISH TV	ENGLISH TV	SPANISH RADIO	ENGLISH RADIO	SPANISH NEWS-PAPER	ENGLISH NEWS-PAPER	INTER-NET	OTHER	DON'T KNOW/REFUSED
News about health, education, and politics	33%	36%	3%	4%	2%	6%	12%	1%	2%
New in their family's country of origin	38%	17%	4%	2%	2%	4%	21%	5%	7%
What to do when a disaster occurs	25%	42%	6%	10%	1%	1%	7%	3%	5%
Shopping for food	12%	11%	2%	1%	10%	22%	6%	28%	8%
Shopping for a major appliance or electronics	10%	10%	1%	1%	5%	22%	26%	17%	9%
Shopping for a car	7%	9%	1%	1%	4%	15%	28%	25%	10%

**SOURCE:** Univision and Associated Press

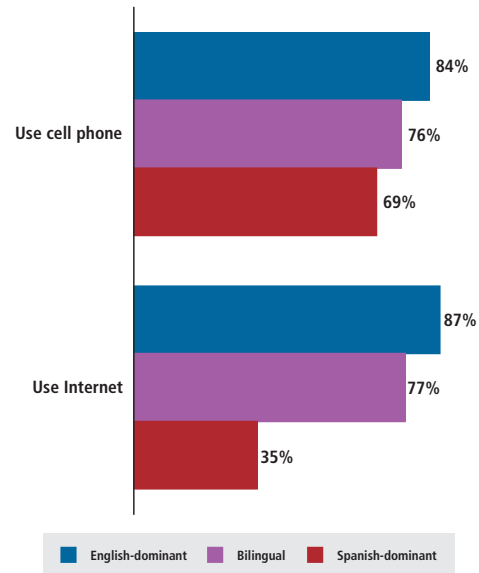
**SOURCE:** "Hispanic Poll," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; surveys.ap.org. Price: Call for information.

## U.S.-Born Hispanics Outpace Foreign-Born Hispanics' Use Of Technology

The vast majority of U.S.-born Hispanics aged 16 and older (85%) go online, compared to only 51% of their foreign-born counterparts, reports Pew Hispanic Center. Native-born Hispanics (80%) also outpace foreign-born Hispanics (72%) in cell phone use.

The underlying cause for the gap in usage is language. Only 35% of Spanish-dominant Hispanics go online, com-

**HISPANICS’ USE OF CELL PHONES AND INTERNET, BY LANGUAGE PREFERENCE, 2010**



**SOURCE:** Pew Hispanic Center

pared to 87% of English-dominant Hispanics. Nearly seven in 10 Spanish-dominant Hispanics (69%) use cell phones, compared to 84% of English-dominant Hispanics.

Age is less of a factor in cell phone use than in Internet use. Among Hispanics who do not speak English very well, 69% of 20-25 year olds and 70% of those aged 26 and older use cell phones. When it comes to going online, 46% of Hispanics aged 20-25 who do not read English very well go online, compared to 30% of those aged 26 and older.

Among Hispanics who speak and read English well, age is a minor factor in both cell phone and Internet use: 85% of Hispanics aged 20-25 use cell phones, compared to 78% of those aged 26 and older; 88% of the younger group go online, compared to 83% of the older group.

**SOURCE:** "The Latino Digital Divide: The Native-Born Versus The Foreign-Born," Pew Hispanic Center, Gretchen Livingston, Senior Researcher, 1615 L St. NW, #700, Washington, DC 20036; 202-419-3600; glivingston@pewhispanic.org; www.pewhispanic.org. Price: Available online at no charge.

## Online Hispanics Spend Time On English-Language Websites

The online Hispanic population (average age of 37) is much younger than the general online population (average age of 46), according to AOL. They have a smaller income (\$50,000 vs. \$75,000), and have more, and younger, children, in contrast to the general population, which has fewer, and older, children.

Perhaps because of their relative youth, Hispanics are more likely to go online via mobile phones (32% vs. 20%) and gaming devices (18% vs. 11%).

Online Hispanics are more likely than the general population to view the Internet as:

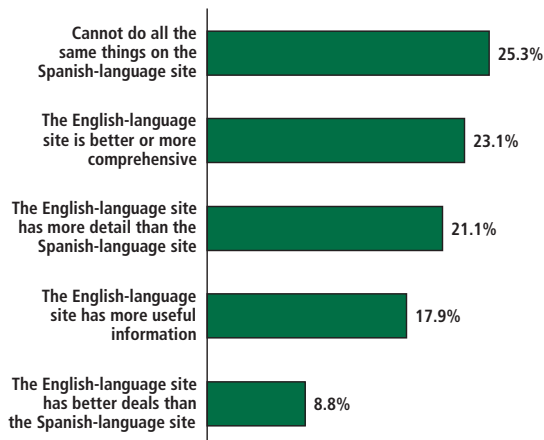
- ▶ The best place to keep up with current events (64% vs. 51%);
- ▶ A place to always find deals (57% vs. 43%);
- ▶ A source for keeping up with pop culture (44% vs. 25%);
- ▶ A tool for building a better life (36% vs. 30%); and
- ▶ A place to meet people with similar views (27% vs. 15%).

Spanish-dominant Hispanics spend 9.3 hours with Spanish-language online media per week, and 14.4 hours with English-language online media. For bicultural and English-dominant Hispanics, the balance shifts significantly, with bicultural Hispanics spending 12.4 hours with English and 2.5 hours with Spanish online media, and English-dominant Hispanics spending 20.0 hours with English and 3.0 hours with Spanish online media.

They prefer Spanish online media when the site offers more than just straight translation of the English site (52%). They also prefer Spanish sites when those reflect their experience in the U.S. (44%) and take into account their ties to their home country (24%).

With English online media, they also say it matters that such sites take into account their ties to their home country (36%) and their experience in the U.S. (33%).

REASONS HISPANICS PREFER ENGLISH- TO SPANISH-LANGUAGE WEBSITES, 2010



SOURCE: AOL

SOURCE: "Hispanic Cyberstudy," AOL, Liz Bloom, Sr. Manager Market Research, 770 Broadway, New York, NY 10003; 212-206-4400; www.aol.com. Price: Available online at no charge.

## Emerging Majorities Are More Likely Than Whites To Shop, Buy Online

Hispanics, Blacks, and Asians each list shopping as their favorite online activity for fun and entertainment, according to BIGresearch. Shopping ranks second among Whites.

A slight majority of Hispanics (51%) regularly shop online, and 32% regularly make online purchases. Half of Asians (50%) regularly shop online, and they are more likely than Hispanics to make regular online purchases (35%). Some 47% of Blacks shop online regularly, and 34% regularly make purchases. Whites are the least likely to shop online regularly (40%) and least likely to make online purchases regularly (30%).

Emerging majorities are also more likely than Whites to use social media sites. In particular, they are more likely to regularly visit Facebook: 56% of Asians do so, as do 54% of Hispanics, 48% of Blacks, and 43% of Whites. Hispanics (15%), Asians (14%), and Blacks (10%) are more likely than Whites (6%) to regularly visit MySpace. Whites (5%) also lag Asians (15%), Hispanics (11%), and Blacks (9%) in regular use of Twitter.

AMERICANS' FAVORITE ONLINE ACTIVITIES FOR FUN & ENTERTAINMENT, BY RACE, 2010

HISPANIC	
Shopping .....	44%
Movie reviews/schedules.....	38%
Download music/shows.....	37%
Watch TV shows .....	32%
Social networking.....	31%
BLACK	
Shopping .....	46%
Download music/shows.....	33%
Watch TV shows .....	30%
Social networking.....	29%
ASIAN	
Shopping .....	43%
IM/Chat .....	39%
Video games.....	38%
Download music/videos.....	36%
Movie reviews/schedules.....	33%
WHITE	
Weather.....	40%
Shopping .....	39%
Social networking.....	29%
Movie reviews/schedules.....	27%
Sports news/scores.....	25%

SOURCE: BIGresearch

SOURCE: "SIMM 16," BIGresearch, Phil Rist, VP Strategic Initiatives, 450 W. Wilson Bridge Rd., #370, Worthington, OH 45085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Available upon request at no charge.

## Hispanic Online Audience Increases As Counting Methods Improve

The number of online Hispanics increased to 23.6 million in February 2010, up 3.3 million (or 13.9%) over the prior 11 months, according to comScore. The researchers attribute the increase to improved counting methods that are better at including cell-phone only households, which are prevalent among Hispanics.

The top websites in terms of Hispanic visitors include:

- ▶ Google sites (18.5 million visitors);
- ▶ Yahoo! sites (18.3 million);
- ▶ Microsoft sites (16.9 million);
- ▶ Facebook.com (10.6 million);
- ▶ Ask Network (9.0 million);
- ▶ Fox Interactive Media (8.9 million);
- ▶ AOL (8.9 million);
- ▶ Apple (7.2 million);
- ▶ Wikimedia Foundation sites (7.0 million);
- ▶ Amazon sites (6.6 million);
- ▶ eBay (6.6 million);
- ▶ Warner Music (5.9 million);
- ▶ CBS Interactive (4.9 million);
- ▶ Glam Media (4.4 million); and
- ▶ Viacom Digital (4.3 million).

**SOURCE:** "Media Metrix," comScore, Andrew Lipsman, Senior Analyst, 500 W. Madison, #2980, Chicago, IL 60661; 312-775-6510; alipsman@comscore.com; www.comscore.com. Price: Call for information.

## Social Media In 2010: Americans Of All Ages Have Profiles — And Follow And Friend Brands

Nearly half of Americans aged 12 and older (48%) have a profile on a social network, double the proportion in 2008 (24%), according to Edison Research. The audience at every age level increased substantially during that period, with those aged 25 and older more than doubling.

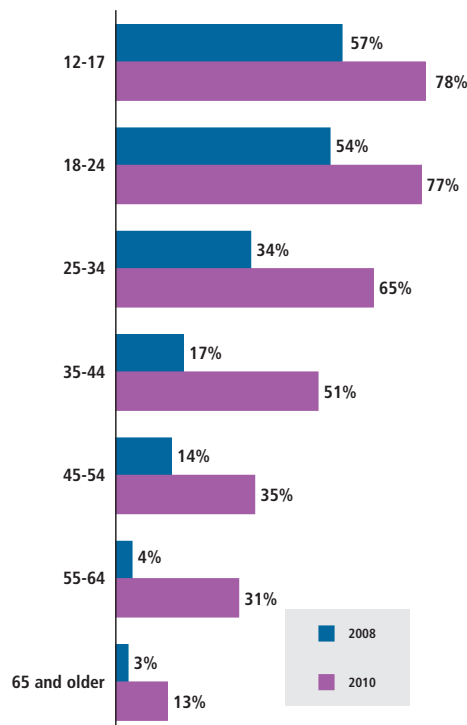
Although Facebook established itself as the dominant social network in 2009, Twitter was the most talked about. The buzz has died down somewhat, but Americans' awareness of the site grew to 87%, putting it on par with Facebook, of which 88% of Americans are aware.

However, only 7% use Twitter. The vast majority of those (85%) visit the site once a month, and 33% do so daily. By comparison, 41% of Facebook users access the site daily.

Monthly users of Twitter are more likely to be female (53%) than male (47%). The largest proportion is aged 25-34 (33%). They are also more likely than the general population to be Black (24%) and Hispanic (17%), whereas only 51% are White and 3% Asian.

Monthly Twitter users are more frequent users of social networks overall. Some 44% access social networks at least daily, compared to 30% of social network users overall.

AMERICANS WITH A PROFILE ON AT LEAST ONE SOCIAL NETWORK, BY AGE, 2008 VS. 2010



SOURCE: Edison Research

HOW PEOPLE USE TWITTER TO ENGAGE WITH BRANDS ON THE SOCIAL NETWORK, 2010



SOURCE: Edison Research

Nearly half of Twitter users (49%) follow or friend brands on social networks. Many use the site to get more information about and to discuss brands' products and services. Most (66%) say they would not reduce their use of Twitter if the site incorporated targeted advertising, 19% would use the site less, and 15% would stop using it all together.

*How Americans Use Social Media*, a new report from EPM Communications, publisher of RESEARCH ALERT, offers resources and case studies for brands that wish to reach out to consumers via social media. Lynne d Johnson, SVP Social Media for the Advertising Research Foundation, notes that standards to measure the benefits of social media are yet to come, but it is clear that such sites can impact a brand's bottom line. She adds that the only way to reap the benefits is to dive in and get started — with thoughtful consideration about the audience the company wants to reach and how best to do so.

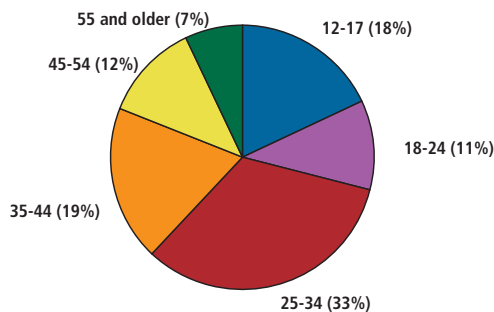
To ensure success, it is necessary to know how people use social media, and how they interact with brands online. While 88% use social media to maintain their personal relationships, according to Rasmussen data cited in the report, they also use social media to listen to music, play games, read news, and read and post product reviews.

Those who have friended a brand on MySpace or Facebook do so:

- ▶ To find out about deals (37%);
- ▶ Because they are already a customer (33%);
- ▶ To get access to interesting or entertaining content (18%);
- ▶ Because others they know are friends with the brand (6%);
- ▶ To get service, support, or product information (5%), according to a Razorfish survey cited in the report.

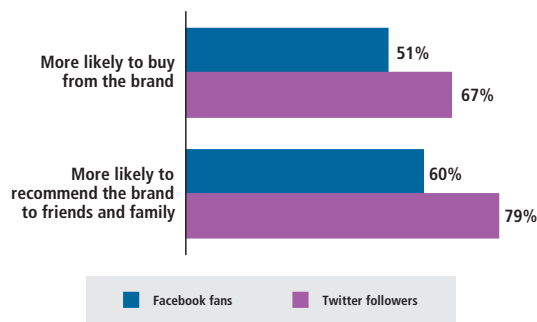
People who friend or follow a brand on social media say they are more likely to buy from that brand and recommend

AGE OF TWITTER USERS WHO ACCESS THE SITE AT LEAST MONTHLY, 2010



SOURCE: Edison Research

FANS AND FOLLOWERS OF BRANDS ON SOCIAL NETWORKS WHO ARE MORE LIKELY TO BUY AND RECOMMEND THE BRANDS, 2010



SOURCE: Chadwick Martin Bailey

it to family and friends, per Chadwick Martin Bailey research cited in the report.

Many social media users are concerned about privacy online, which is likely why only 51% use their real name on their profiles, according to Chubb Group. Nearly a third (31%) sometimes use their real name or a nickname. Most (66%) would not use a mobile social technology that allows others to see where they are located.

**SOURCES:** "Twitter Usage In America, 2010," Edison Research, Tom Webster, VP, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; twebster@edison-research.com; www.edisonresearch.com. Price: Available online at no charge.

Advertising Research Foundation, Lynne d Johnson, SVP Social Media, 432 Park Ave. S., New York, NY 10016; 646-465-5759; lynne@thearf.org; www.thearf.org.

"How Americans Use Social Media," EPM Communications Inc., Ira Mayer, Publisher, 19 W. 21st St., New York, NY 10010; 212-941-1633, x27; imayer@epmcom.com; www.epmcom.com. Price: \$129 for paid subscribers of EPM newsletters, \$169 for non-subscribers.

"Social Media Risks," Chubb Group, Mark Schussel, 15 Mountain View Rd., PO Box 1516, Warren, NJ 07059; 908-419-9889; mschussel@chubb.com; www.chubb.com. Price: Available online at no charge.

## Profiles Of Social Network Users

The two personas most likely to "fan" a company on Facebook are young-skewing "social butterflies" and "gamers," according to ExactTarget. Social butterflies, as the name suggests, use social networks to make and maintain online friendships. They are active bloggers and actively consume online video and podcasts. Gamers are primarily male and are less affluent than other groups. They tend to use online sites to play games and to seek information for new games and strategies.

The other 10 personas include:

**Open Book:** 12% of 15-17-year-olds and 25% of 18-24-year-olds are uninhibited users who freely express their likes, dislikes, experiences, and opinions. They can be a brand's strongest advocate or its harshest detractor. They tend to "fan" brands on Facebook in order to interact with them and not to receive promotions or sales.

**Megaphone:** 10% of 15-17-year-olds and 21% of 18-24-year-olds fall into this "influencer" category. They enjoy interacting with brands online because it allows them to interact in a public forum. They want to connect with other users in order to educate and share resources.

**Inner Circle:** 8% of 15-17-year-olds and 16% of 18-24-year-olds fall into this group that primarily uses social networks to maintain current friendships, but are not actively searching for new friends or to engage with brands. They dislike brand interaction and can be hard to reach. Girls are more likely than boys to fall within this group.

**Enthusiast:** Some 8% of 15-17-year-olds and 20% of 18-24-year-olds are Enthusiasts. They connect with like-minded individuals to discuss key areas of interest or hobbies. They rely on other users — not companies — to get information from blogs, podcasts, and video. They like to be among the first to learn about new products and developments.

**Cautious:** 6% of 15-17-year-olds and 9% of young adults fall into this group that are very selective about who they communicate with and the type of information they share online.

**Shopper:** 4% of 15-17-year-olds and 14% of 18-24-year-olds like everything about shopping, including research, purchasing, selling their own stuff, and participating in ratings and reviews. They are more likely to buy a brand after becoming a fan on its Facebook page.

Teens and young adults are significantly less likely than older Internet users to be **Info Seekers** (2% of 15-17-year-olds and 11% of 18-24-year-olds), **Deal Seekers** (2% of 15-17-year-olds and 13% of 18-24-year-olds), **News Junkies** (2% of 15-17-year-olds and 9% of 18-24-year-olds) and **Business Users** (1% of 15-17-year-olds and 8% of 18-24-year-olds).

**SOURCE:** ExactTarget, Morgan Stewart, Director Research Strategy, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; mstewart@exacttarget.com; www.exacttarget.com.

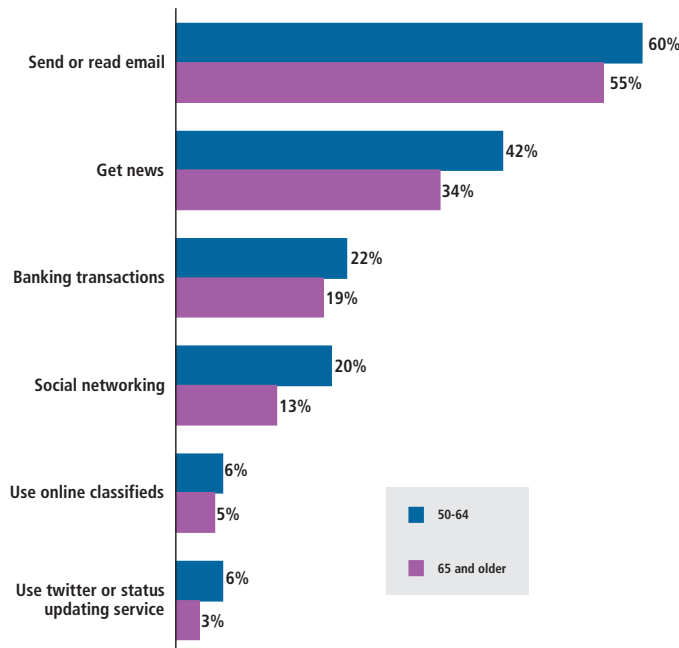


## Older Americans Are Social Network Users

In the six months between December 2009 and May 2010, the proportion of 18-29 year olds using social networks climbed slightly to 86%, up from 83%, according to Pew Internet & American Life Project. Among 30-49 year olds, 61% used social networks, up from 58%. The greatest increases in users are from those aged 50 and older; nearly half of 50-64 year olds (47%) used social networks, up from 36%. More than a quarter of those aged 65 use social nets, up from 22%.

More than three quarters of Americans aged 50-64 with a broadband connection at home (77%) go online daily, as do 72% of those aged 65 and older. For 20% of 50-64 year olds and 13% of those aged 65 and older, that includes a daily visit to a social network.

ONLINE ACTIVITIES OF AMERICANS AGED 50 AND OLDER WITH A BROADBAND INTERNET CONNECTION AT HOME, 2010



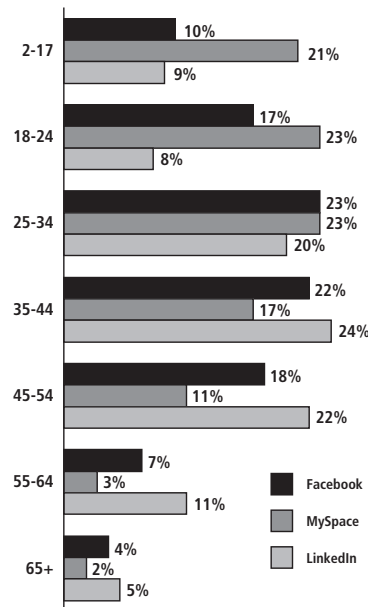
SOURCE: Pew Internet & American Life Study

SOURCE: "Older Adults and Social Media," Pew Internet & American Life Study, Mary Madden, Sr. Research Specialist 1615 L St. NW, #700, Washington, DC 20036; 202-419-4500; mmadden@pewinternet.org; www.pewinternet.org.

## Social Networks Skew Older

Despite their reputation, social networking sites aren't youth-specific. In fact, there are twice as many 35-44-year-olds on Facebook as those age 2-17, according to comScore.

SOCIAL NETWORKING USAGE, BY AGE



SOURCE: comScore

SOURCE: comScore, Andrew Lipsman, Senior Analyst, 500 W. Madison Ave., #2980, Chicago, IL 60661; 312-775-6510; alipsman@comscore.com; www.comscore.com.

## The Evolution of Social Media: A Look At Young Users

While older adults flock to Facebook to connect with long lost friends and update their status, their younger counterparts are using different social media for different purposes, according to Bridge Ratings.

Girls aged 6-17 are spending less time on Facebook and MySpace, while flocking sites such as Poptropica, Stardoll, and Club Penguin, which allow for greater anonymity and fit their unique interests. Their primary uses of social media include:

- ▶ Social networking to making friends and have companionship;
- ▶ Twitter to stay in touch and see what others are talking about; and
- ▶ Niche networks to fuel their hobbies and other interests.

Women aged 18-24 use social networks to build their adult lives, whether that means finding a mate or starting a family. Nearly half of women in this age group (45%) have posted information about a consumer product online. Their primary uses of social media include:

- ▶ Social networking to hear the latest news from friends and develop new relationships;
- ▶ Blogging about trends and household management; and

- ▶ Sharing photos as a way to express their family-focused lives or to build relationships.

Men aged 18-28 are the self-identified experts of the Internet. Three quarters (76%) forward product information and links to others, and 45% regularly upload reviews or product ads to social networks. Their primary uses of social media include:

- ▶ Social networks to keep up with friends and work connections;
- ▶ Blogging to express their opinions; and
- ▶ Wikis to feed their curiosity and boost their knowledge.

**SOURCE:** "Social Media Network Hierarchy," Bridge Ratings, Dave Van Dyke, President & CEO, 450 N. Brand Blvd., 6th Fl., Glendale, CA 91203; 818-291-6420; dvd@bridgeratings.com; www.bridgeratings.com. Price: Call for information.

## Trends In Young Adults' Use Of Social Media

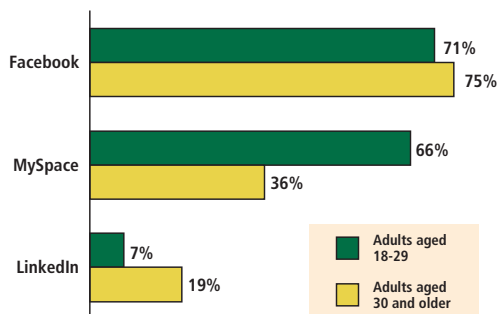
Nearly half of adults (47%) have profiles on social networking sites, up from 37% in 2008, according to Pew Internet & American Life Project. Of those who use social networking sites, Facebook (73%) is by far the most popular, followed by MySpace (48%) and LinkedIn (14%). Most adults who use social networks (52%) maintain multiple profiles, up from 42%.

Younger adults aged 18-29 (72%) have profiles on social networking sites, compared to 42% of those aged 30 and older. Their use of such sites has grown while their interest in blogging has waned. One in six 18-29 year olds (15%) blog in 2009, down from 24% in 2007. Meanwhile, 11% of those aged 30 and older blog, up from 7% over the same period.

Young adults' interest in blogging may have been usurped by their interest in Twitter. A third use the site to read or post status updates, compared to about two in 10 adults overall. Those who use the site are:

- ▶ 37% of 18-24 year olds;
- ▶ 25% of 25-29 year olds;
- ▶ 22% of 30-49 year olds;

**SOCIAL NETWORKS ON WHICH ADULTS HAVE PROFILES, BY AGE, 2009**



NOTE: Of those with profiles on social networks.

**SOURCE:** Pew Internet & American Life Project

- ▶ 9% of 50-64 year olds; and
- ▶ 4% of those aged 65 and older.

**SOURCE:** "Social Media & Mobile Internet Use Among Teens And Young Adults," Pew Internet & American Life Project, John Horrigan, Associate Director Research, 1615 L St. NW, #700, Washington, DC 20036; 212-419-4500; jhorrigan@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

## Americans Are Willing To Give Up Privacy And Divulge Personal Information On Social Media

Nearly two thirds of adults (64%) use social media, including 78% of 18-34 year olds, 71% of 35-44 year olds, 59% of 45-54 year olds, and 43% of those aged 55 and older, according to Harris Interactive. Most adults who use social media (83%) know that they are giving up some privacy to participate in such activities.

The vast majority of social media users (84%) have shared personal details on a social media site, most commonly updates about their lives, pictures, what they are currently doing.

Nearly four in 10 (38%) participate in social media with the intention to influence others when they express their opinions. The younger they are, the more likely they are to have this hope: 45% of 18-34 year olds want to influence others, compared to 29% of those aged 55 and older. A third (34%) have used social media to rant or rave about a product or company. Again, 18-34 year olds (44%) are most likely to do so, followed by 34% of 35-44 year olds, 25% of 45-54 year olds, and 16% of those aged 55 and older.

### INFORMATION AMERICANS SHARE VIA SOCIAL MEDIA, 2010

Updates about their lives	43%
Their age	43%
Pictures of what they've been doing	43%
What they're currently doing	36%
Places they are going	31%
Links to articles they like	30%
Recommendations about fun things to do	30%
TV and movie suggestions	29%
Their dissatisfaction with a company, brand, or product	26%
Their political views	25%
The companies, brands, or products they like	23%
Their religious beliefs	23%
Product reviews and recommendations	19%
Information about themselves they normally wouldn't share face-to-face	6%
Embarrassing questions they never would ask in person	4%
Other	8%

**SOURCE:** Harris Interactive

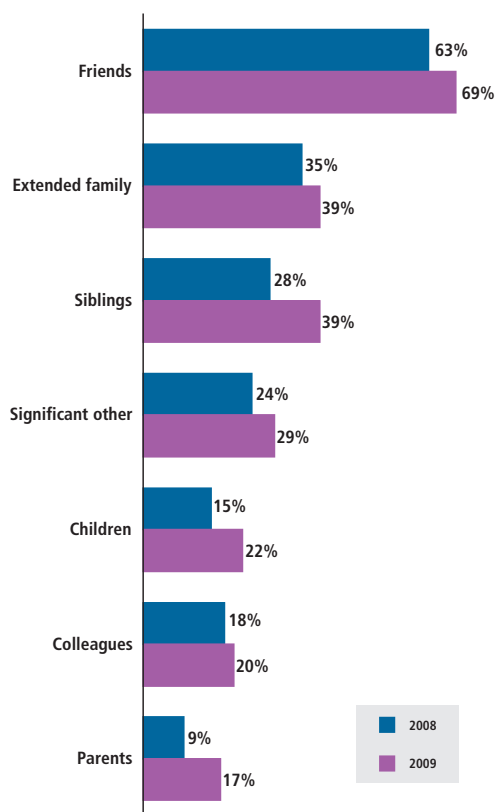
**SOURCE:** "Speak Now Or Forever Hold Your Tweets," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

## Social Net Users Communicate With All Types Of Friends Online

Two thirds of Americans (66%) had at least one profile on a social network as of late 2009, including 88% of 18-34 year olds, 69% of 35-49 year olds, and 41% of those aged 50 and older, according to Experian Simmons. Of those who use social nets, 43% visit them multiple times a day, compared to 18% who visit them less than weekly.

For a majority of users, social networking is about keeping in touch with friends (88%) and family (70%) and reconnecting with people (68%). Social networking users are most likely to be connected to their friends online, but increasingly they are using the sites to connect with their parents, children, and siblings.

PEOPLE WITH WHOM SOCIAL NETWORK USERS COMMUNICATE WITH VIA SUCH SITES, 2008 VS. 2009



SOURCE: Experian Simmons

SOURCE: "2010 Social Networking Report," Experian Simmons, Eileen Merken, Director Analytics, 1501 SW FAU Research Park Blvd., #100, Deerfield Beach, FL 33441; 954-246-8220; eileenm@smrb.com; www.smrb.com. Price: Call for information.

## Privacy Policy: Most Facebook Users Go With The Flow

Following Facebook's several rounds of changes to its privacy management tools—which were widely discussed in the media—one in eight users (12%) considered canceling their account with the social networking site, though only 1% did, according to BIGresearch. Men (14%) were more likely than women (11%) to consider deleting their profile. Most users (55%) did not make any changes to their profile's privacy settings, while 32% updated their privacy preferences. Those aged 18-34 were most likely to take action following Facebook's changes:

- ▶ 16% considered canceling their account, including 3% who did so;
- ▶ 40% changed their privacy settings; and
- ▶ 45% did nothing.

Those aged 55 and older were least likely to take action [ED NOTE: That may be because they are less comfortable sifting through pages of preferences to find the settings they need to change]:

- ▶ 13% considered canceling their account, though only 0.3% of those did so;
- ▶ 23% changed their privacy settings; and
- ▶ 64% did nothing.

SOURCE: "American Pulse, May 2010," BIGresearch, Phil Rist, VP Strategic Initiatives, 450 W. Wilson Bridge Rd., #370, Worthington, OH 45085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Available upon request at no charge.

## Americans Are More Connected Than Ever To Both People And Brands Through Social Media

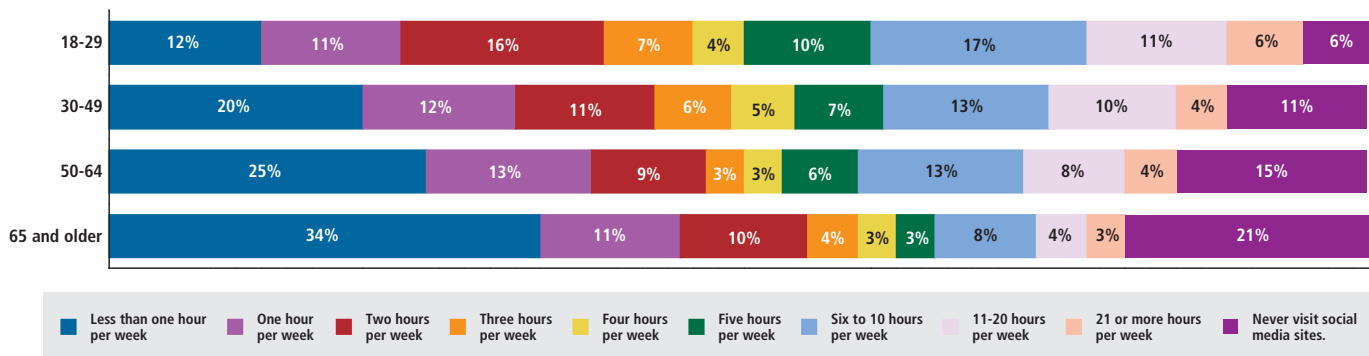
A majority of Americans use social media, including 86% of 18-29 year olds, 61% of 30-49 year olds, 47% of 50-64 year olds, and 26% of those aged 65 and older, according to Pew Internet & American Life Project.

Social media users (79%) feel most connected to their close friends via such sites, including 23% who feel very connected to this group online. Nearly three quarters (74%) feel connected to their immediate family via social media, 70% to extended family, 70% to friends of friends and acquaintances, 63% to former classmates, and 40% to business associates.

Although social media users feel most connected to their close friends and family online, they prefer to interact with them face-to-face. They feel less connected with acquaintances online, but are equally split on their preference for communicating with them online versus in person (see chart). Those aged 18-34 (57%) are more likely than average to prefer communicating with acquaintances in this manner.

More social media users agree (53%) than disagree (31%) that they prefer to listen to what others have to say than to

NUMBER OF HOURS PER WEEK AMERICANS SPEND ON SOCIAL MEDIA SITES, BY AGE, 2010



SOURCE: Pew Internet & American Life Project

offer their own opinions. Six in 10 (60%) value the opinions others share in the social media space. More users agree (41%) than disagree (34%) that they feel important when they give feedback about brands, products, and services on social media sites. Those aged 18-34 are more likely than average to value the opinions others share on social nets (68%) and to feel important when sharing their own opinions on brands, products, and services (47%).

The vast majority of Americans (86%) have interacted with a company or brand online; 38% use social networks to do so, 16% use message boards, and 13% use blogs, according to Cone Inc. That is compared to 63% who interact with companies and brands via websites and 62% who do so via email.

Social media users follow an average of five companies or brands on Facebook and Twitter. A third (33%) don't follow any, where as 8% follow 10 or more.

The most common reason consumers are enticed to follow a company or brand via social media is to access incentives, such as coupons, discounts, and free products and services (77%). Nearly half of online Americans (48%) look for such incentives in the social media space, compared with 20% who look for them on their mobile devices, 20% via message boards, and 13% on blogs.

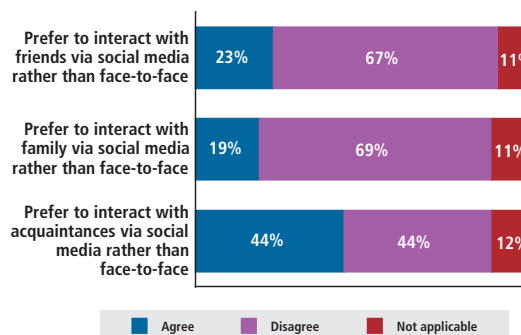
Companies stand to gain by engaging with social media users:

- ▶ 63% of users say they are more aware of companies and brands they interact with via new media;
- ▶ 62% are more likely to share information about a company or brand they interact with via new media;
- ▶ 61% feel a stronger connection to the companies and brands they interact with via new media; and
- ▶ 59% are more likely to make a purchase from a company or brand that they interact with via new media.

Although consumers are eager to follow companies and brands on social networks, there are a variety of reasons they would stop doing so, including:

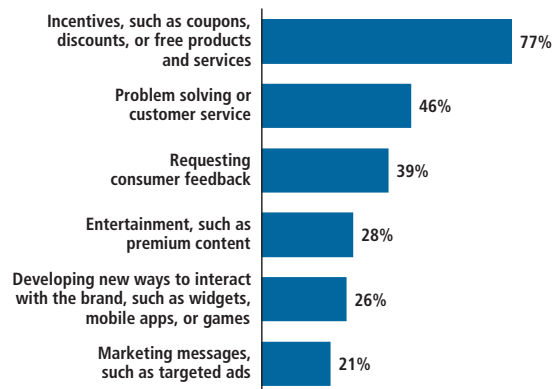
- ▶ If the company or brand acted irresponsibly toward them or other consumers (58%);

AMERICANS' PREFERENCE FOR COMMUNICATING WITH FRIENDS, FAMILY, & ACQUAINTANCES, 2010



SOURCE: Pew Internet & American Life Project

OFFERS THAT ENTICE CONSUMERS TO FOLLOW COMPANIES OR BRANDS IN THE SOCIAL MEDIA SPACE, 2010



SOURCE: Cone Inc.

- ▶ If it over-communicates by putting out too many messages or sending spam (58%);
- ▶ If the content it provides is not relevant to the consumer (53%);
- ▶ If the company or brand does not communicate or engage them enough (36%); or

- ▶ If it censors content posted by them or other consumers (28%).

A relatively new aspect of social media is geosocial services — such as Foursquare, Gowalla, and Facebook Places — which allow users to check in online at a physical location and see who else is there and, in some cases, access special offers.

On a typical day, 1% of Internet users access geosocial services, and 4% of online Americans have ever used such a service, according to Pew Internet & American Life Project. Men (6%), Hispanics (10%), and 18-29 year olds (8%) are more likely than average to use such services. In addition, those who use status updating services, such as Twitter, are more likely than average to use geosocial services (10% vs. 4%).

**SOURCES:** “2010 Consumer New Media Study,” Cone Inc., Carol Cone, 855 Boyleston St., Boston, MA 02116; 617-227-2111; ccone@coneinc.com; www.coneinc.com. Price: Call for information.

“Thanks To Social Networks, Americans Feel More Connected,” Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

“Location Based Services,” Pew Internet & American Life Project, Aaron Smith, Sr. Research Specialist, 1615 L St. NW, #700, Washington, DC 20036; 202-419-4500; asmith@pewinternet.org. Price: Available online at no charge.

## Social Net Users Welcome Brand Interaction

Americans who actively use social network sites most commonly have profiles on Facebook (90%), reports Invoke Solutions. More than three in 10 (31%) have active accounts on Twitter, 26% on LinkedIn, and 41% have an active account on another social networking site. In addition, 25% write a blog.

Most active social network users interact with brands on such sites:

- ▶ 65% are fans of at least one product or retailer on Facebook;
- ▶ 39% read product- or company-sponsored blogs;
- ▶ 31% follow companies on Twitter; and
- ▶ 30% participate in an online community sponsored by a brand or company.

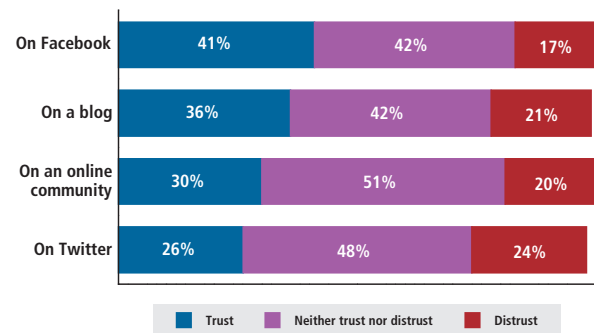
In addition, 32% of social network users frequently share information or reviews about new products, and 30% pass on information about sales or deals.

Social network users are more likely to trust a brand, product, or company post to Facebook than a post on Twitter or another online community. The factors that figure into their trust of posts on social networks or online communities include:

- ▶ Dialog open to both positive and negative comments (64% cite as important);
- ▶ Quality of the comments (62%);

- ▶ Responsiveness of sponsor or author (60%);
- ▶ Volume of participation (49%);
- ▶ Length of time they have been a fan or follower (42%); and
- ▶ Number of people who are fans or followers (38%).

**SOCIAL NETWORK USERS LEVEL OF TRUST OF POSTS BY COMPANIES, PRODUCTS, AND BRANDS, BY NETWORK, 2010**



**SOURCE:** Invoke Solutions

**SOURCE:** “Invoke Live: Social Networking” Invoke Solutions, Grant Ligon, VP Business Development, 375 Totten Pond Rd., #400, Waltham, MA 02451, 781-810-2700; grant@invoke.com; www.invoke.com. Price: Call for information.

## Facebook Fans Bring Brands An Average Of \$136 Per Year

The average Facebook fan is worth \$136.38 a year to brands, finds Syncapse. The researchers calculated the value of a fan based on past and projected consumer behaviors and their attitudes and actions based on their friends; and family’s perceptions of their consumer behaviors relative to 20 top national brands.

The value of a fan can vary widely based on product prices, purchase frequency, purchase cycle, product category, brand equity, and other factors. For example, a brand with a great deal of support even among non-fans — such as BlackBerry— has lower-valued fans because it does not need a fan lift to boost sales. On the other hand, a brand such as Nokia has higher-valued fans because there is less buzz generated by non-fans.

Fans spend an average of \$71.84 more per year on a brand than do non-fans. Fans are 28% more likely than non-fans to remain loyal users of a brand. More than two thirds of Facebook fans (68%) are “very likely” to recommend a brand to friends and family, compared to 28% of non-fans. Fans’ recommendations have a significant impact on their friends. Nearly four in 10 people (38%) say they would be likely to become a fan of a product or brand if one of their friends is a fan. Among people who only know the friend who became a fan through Facebook and not outside of the social network, that influence drops only slightly to 34%.

**CALCULATING THE VALUE OF A FACEBOOK FAN, 2010**

Increase in spending	\$71.84
Boost in loyalty	\$43.71
Value of recommendations	\$13.57
Earned media value	\$6.79
Cost offset for fan acquisition	\$0.47
<b>TOTAL VALUE</b>	<b>\$136.38</b>

**SOURCE:** Synapse

**SOURCE:** "The Value Of A Facebook Fan: An Empirical Review," Synapse, Paul Cowan, VP New Ventures, 20 Duncan St., #301, Toronto, ON M5H 3G8; 416-593-3773; pcowan@synapse.com; www.synapse.com. Price: Available online at no charge.

**Deal Seekers And Shoppers On Social Media**

Deal Seekers (30% of online Americans aged 15 and older) and Shoppers (24%) are two segments of online consumers that companies can find on social networks, according to ExactTarget.

**Deal Seekers**

- ▶ Most members of this segment are aged 25-44 (51%), and 58% are female.
- ▶ They have an average household income of \$57,487.
- ▶ Most Deal Seekers are women (58%), and 45% of women with children under age 18 fall into this segment.
- ▶ 89% use email daily, 39% check Facebook daily, and 5% visit Twitter daily.
- ▶ Deal Seekers view social media connections with brands as a means to obtain exclusive deals, freebies, discounts, coupons, and notifications.
- ▶ The average Deal Seeker is a fan of 10 brands on Facebook and follows 10 companies on Twitter.
- ▶ They receive an average of 14 permission-based emails a day, 20% more than the average consumers.
- ▶ They actively participate in ratings and review sections of retailers' websites.

**Shoppers**

- ▶ Most members of this segment are aged 25-34 (22%), 34-44 (22%), or 45-54 (21%).
- ▶ 48% have a household income of \$50,000 or more.
- ▶ 57% of Shoppers are women, and Shoppers are less likely than average to have children at home.
- ▶ 88% use email daily, 39% check Facebook daily, and 6% visit Twitter daily.
- ▶ Shoppers view social media connections with brands as an opportunity to learn more and research the products they intend to buy.
- ▶ They are focused more on learning about product quality than about deals.

- ▶ Shoppers are selective about the brands they follow online.
- ▶ They are 35% more likely to buy from companies that send them email, 27% more likely to buy from brands they follow on Twitter, and 17% more likely to buy from brands they fan on Facebook.
- ▶ They are most interested in learning about new products and promotions for big-ticket items.

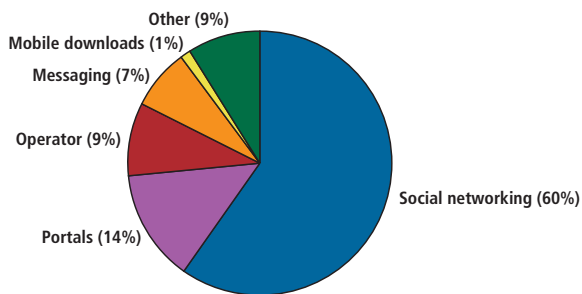
**SOURCE:** "The Social Profile," ExactTarget, Morgan Stewart, Director Research Strategy, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; mstewart@exacttarget.com; www.exacttarget.com. Price: Available online at no charge.

**Social Networks Dominate Mobile Web Use**

A third (32%) of the time mobile users spend accessing the Web from their phones occurs between 7 p.m. and midnight, according to Ground Truth. Mobile Internet usage builds throughout the day, peaking at 9 p.m. when 7% of all page views occur.

The typical mobile Web user access the Internet 68 times a week from his or her cell phone, spending an average of 52 minutes online. The majority of that time is spent accessing social networks. In fact, 58% visited MySpace in the prior week, 57% checked Facebook, and 19% visited Facebook Photos.

**HOW MOBILE WEB USERS ALLOCATE THEIR TIME ONLINE, 2010**



**SOURCE:** Ground Truth

**SOURCE:** "Census Of Mobile Subscribers," Ground Truth, Evan Neufeld, VP Marketing, 999 Third Ave., #4260, Seattle, WA 98104; 206-438-1910; www.groundtruth.com. Price: Call for information.

**Twitter Posts: Who Is Talking About What**

More than nine in 10 messages posted on Twitter (91%) are from consumers, and nearly one in 10 (8%) are generated by companies or brands, with the remaining portion coming from celebrities, according to 360i. Of the messages consumers post, 12% mention brands, most commonly referring to social network brands (22%), entertainment brands (17%), and technology brands (17%). While many companies have begun to monitor mentions of their brands on Twitter, only 1% of messages that refer to a brand are part of a conversation with that brand. Messages about brands

are most commonly posted to share news or information about the brand (43%), refer to using the brand (35%), or share an opinion about the brand (21%).

Twitter messages are most commonly conversational, directed at a specific person (43%), and 24% are status updates or ritualistic, and 12% are news items.

The vast majority of messages posted on Twitter are viewable by the general public, while only 8% are sent privately. Twitter users are more comfortable sharing pieces of personal information than other Web users. Seven in 10 (70%) often post pictures of themselves, and 66% give their locations. However, far fewer share information about their age (3%) or their job (20%).

**SOURCE:** "Twitter & The Consumer-Marketer Dynamic," 360i, Sarah Hofstetter, SVP Emerging Media & Brand Strategy, 28 W. 23rd St., 6th Fl., New York, NY 10010; 888-360-9630; sarah@360i.com; www.360i.com. Price: Available online at no charge.

## Twitter Users Don't Shy Away From Sharing

Twitter users are more active than the typical online American in participating in all varieties of online sharing, according to GfK MRI. They are more likely than average to:

- ▶ Write a blog (+506%);
- ▶ Upload a video to a website (+451%); and
- ▶ Post a comment or review on a blog, online forum, or message board (+315%).

They are also more likely than average to be a published author (+209%). They are more politically active than the typical person, being 142% more likely to participate in environmental groups and 103% more likely to attend a political speech, rally, or organized protest.

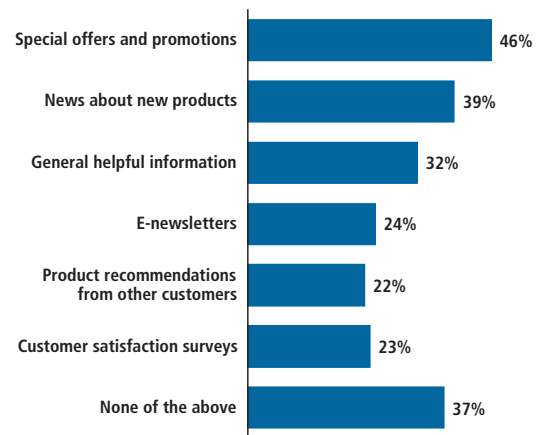
**SOURCE:** "Survey of the American Consumer," GfK MRI, Anne Marie Kelly, SVP Marketing and Strategic Planning, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-884-9204; annemarie.kelly@mediamark.com; www.mediemark.com. Price: Call for information.

## What Drives Americans To Visit Social Networks? Email.

The most common reason North Americans visit a social networking site is because they received an email to their personal address (34%), according to e-Dialog. That compares to 30% who sign in directly. Only a minimal proportion signs in after receiving an SMS text message (4%), a direct mailing (2%), an email to their work account (2%), or a telephone call (1%).

By comparison, people living in the Asia Pacific region far exceed North Americans in visiting a social networking site based on any of the above prompts, while Europeans lag behind North Americans. The same pattern occurs for posting non-personal information (including news about new products or general helpful information) to such sites — only 13% of Asia Pacific residents do not post such information, compared to 37% of North Americans and 46% of Europeans.

**TYPES OF NON-PERSONAL INFORMATION NORTH AMERICANS SHARE VIA SOCIAL NETWORKS, 2010**



**SOURCE:** e-Dialog

**SOURCE:** "Global Perspectives: A Study Of Consumer Attitudes To Digital Marketing," e-Dialog, Jean Borgman, 65 Network Dr., #400, Burlington, MA 01803; 508-451-5944; jborgman@e-dialog.com; www.e-dialog.com. Price: Available upon request at no charge.

## Moms On Twitter Are Networking Mavens

More than three quarters of moms who are Twitter users (77%) come to the site to meet people and network, according to Lucid Marketing and Lisa Finn. They also use the site to keep up with current events (60%), to keep up with a business or brand they like (53%), and to keep in touch with professional contacts (52%). Only 34% use the site as a way to find special offers or coupons.

Nearly a quarter of moms (23%) post a message to Twitter more than 10 times a day; 22% post six to 10 times a day, and 29% post three to five times a day.

**SOURCE:** "Marketing To Moms On Twitter," Lucid Marketing, Kevin Burke, Founder, 2 N. Main St., Allentown, NJ 08501; 609-208-2150; kevin\_burke@lucidmarketing.com; www.lucidmarketing.com. Price: \$149. Also, Lisa Finn, lisa@lisafinn.com.

## Young Women Use The Web To Keep In Touch

Most women aged 18-34 (57%) claim to talk to people online more than they do face to face, finds Oxygen Media Insights Group. Mobile technology and social media have enabled them. Nearly two in five (39%) are Facebook addicts. Nearly a third (31%) feel more confident about their online person than they do in their real lives.

Such technology has also interfered with their daily lives: 37% have fallen asleep with their PDA or cell phone in their hands; 34% say checking Facebook is the very first thing they do in the morning, before going to the bathroom or brushing their teeth; and 26% get up in the middle of the night to read text messages. Considering all that, it may not

come as a surprise that 19% have gotten into fights with friends and family members over the amount of time they spend on their handheld devices or social networks.

Nearly two thirds of young women (63%) use Facebook as a career networking tool. However, many also think it's acceptable to include photos of themselves being visibly intoxicated (42%) or making obscene gestures (32%) on their public profiles.

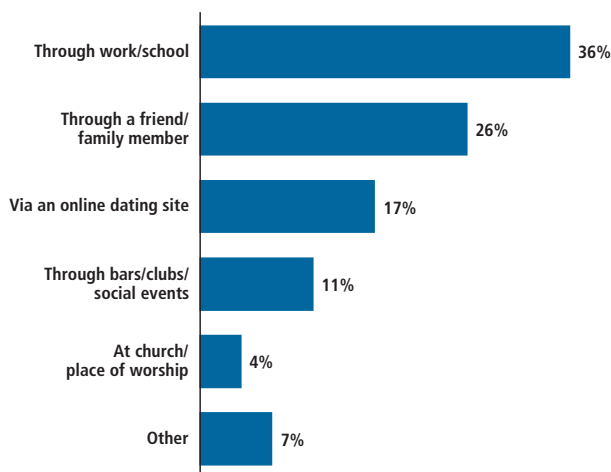
A slight majority of 18-34-year-old women who use Twitter (56%) do not worry about tweeting their current location, and 50% do not worry about posting their current activities on Facebook.

**SOURCE:** Oxygen Media Insights Group, Cameron Blanchard, SVP Communications, 75 Ninth Ave., New York, NY 10011; 212-664-7202; cameron.blanchard@nbcuni.com; www.oxygen.com.

## Singles Explore The Dating Scene Online

More than one in five singles (21%) have dated someone they met through an online dating website in the prior two years, reports Match.com. Of those in a committed relationship, that number rises to 26%. Among couples who were married in the prior three years, online dating websites rank as the third most common way they met.

HOW COUPLES WHO WERE MARRIED IN THE PRIOR THREE YEARS MET, 2010



**SOURCE:** Match.com

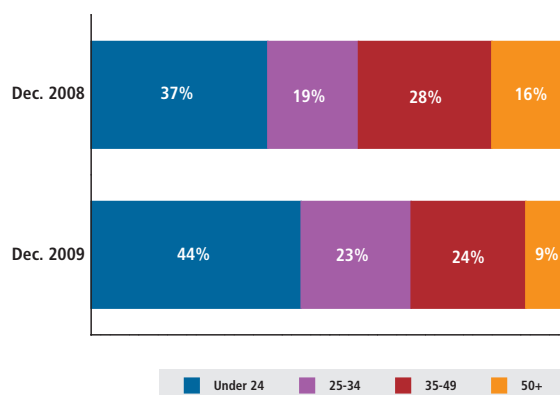
**SOURCE:** "Online Dating Survey," Match.com, Greg Blatt, CEO, 8300 Douglas Ave., Dallas, TX 75225; 214-576-9352; blatt@iac.com; www.match.com.

## MySpace Ages Down, Facebook Grows Older

MySpace's user composition skewed younger in 2009, with those under age 24 comprising 44% of the site's user base, up from 37% in 2008, according to comScore.

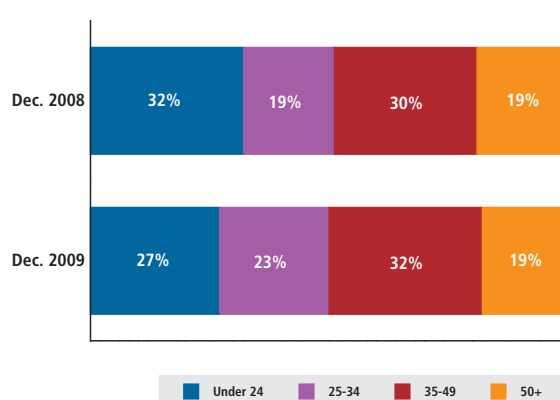
Comparatively, Facebook aged up with 27% of its audience under age 24 in 2009, down from 32% in 2008.

MYSPACE VISITOR COMPOSITION, BY AGE



**SOURCE:** comScore

FACEBOOK VISITOR COMPOSITION, BY AGE



**SOURCE:** comScore

**SOURCE:** "2009 U.S. Digital Year in Review," comScore, Andrew Lipsman, Senior Analyst, 500 W. Madison Ave., #2980, Chicago, IL 60661; 312-775-6510; alipsman@comscore.com; www.comscore.com.

## College Kids Average 438 'Friends'

College students use an average 14.3 screens — primarily TV, computer, and cellphone — in their daily lives, compared to the 5.8 adult average, according to Alloy Media & Marketing, Mindshare's Business Group, and Brainjuicer.

College students are extremely enmeshed in digital networking. They average 87 email contacts, 146 cellphone contacts, and 438 "friends" on social network sites.

**SOURCES:** Alloy Media & Marketing, Jodi Smith, VP Communications 151 W. 26th St., 9th Fl., New York, NY 10001; 212-329-8359; jsmith@alloymarketing.com; www.alloymarketing.com.

Mindshare, Business Planning Group, Debbie Solomon, Managing Director, 350 W. Mart Ctr. Dr., #1270, Chicago, IL 60654; 312-242-1218; debbie.solomon@mindshareworld.com; www.mindshareworld.com.

## Teen Blogging Down In 2009

One in seven teen Internet users (14%) blogged in 2009, down from 28% of online teens who said the same in 2006, according to the Pew Research Center. The number of teen



Internet users who report commenting on a friends' blog dropped to 52% in 2009 from 76% who did so in 2006.

Also:

- ▶ 62% of online teens get news about current events and politics online.
- ▶ 48% of teens who own cell phones have purchased products online, such as books, clothing or music, up from 31% who had done so in 2000.
- ▶ 31% of teen Internet users get health, dieting, or physical fitness information online.

**SOURCE:** Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

## Teens Most Likely To Use Computer Time To Connect Via Social Networks Sites

Teens spend the largest portion of their computer time visiting social network sites, according to the Kaiser Family Foundation. Those aged 11-14 spend 29 minutes a day and those aged 15-18 spend 26 minutes visiting those sites. Games and video websites, such as YouTube, also accrue a large portion of their computer usage. Teens tend not to use computers for reading magazines or newspapers online.

TEENS DAILY COMPUTER USAGE, IN MINUTES, BY AGE, 2009

	11-14	15-18
Social networking	:29	:26
Games	:19	:14
Video websites (YouTube)	:18	:16
Instant messaging	:14	:14
Other websites	:10	:13
Email	:07	:06
Graphics/photos	:06	:04
Reading magazines/newspaper online	:02	:03
Other	:02	:04
<b>TOTAL</b>	<b>1:46</b>	<b>1:39</b>

**SOURCE:** Kaiser Family Foundation

**SOURCE:** "Generation M2: Media in the Lives of 8-18-Year-Olds," Kaiser Family Foundation, Vicky Rideout, VP Director Media & Health, 2400 Sand Hill Rd., Menlo Park, CA 94025; 650-854-9400; vrideout@kff.org; www.kff.org.

## Teen Virtual World Users Embrace Brands

Three in four teens (72%) are willing to friend a brand on a virtual world, according to Sulake, operator of the Habbo Hotel. Nine in 10 (92%) would participate in a brand activity hosted in a virtual world and a similar percentage (93%) are willing to keep displaying branded virtual items or badges even after the promotion has ended.

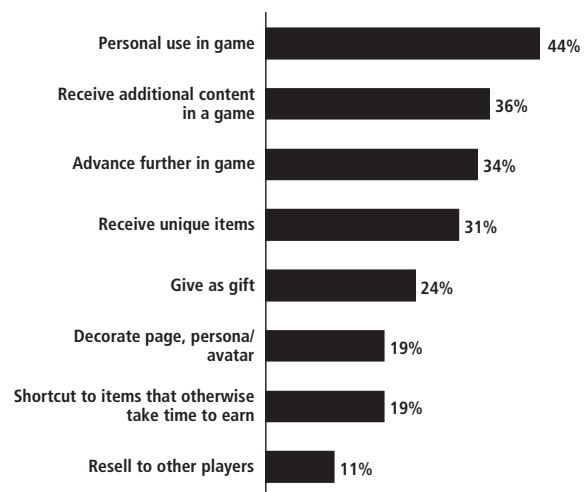
**SOURCE:** Sulake, Teemu Huuhtanen, President, North America, 225 Santa Monica Blvd., #400, Santa Monica, CA 90401; 310-395-0404; teemu.huuhtanen@sulake.com; www.sulake.com.

## Teens, Young Adults Spend Real Money For Virtual Goods

Virtual goods buyers spent an average \$92 on such items last year, according to PlaySpan and research firm Frank N. Magid Associates. More than half (57%) of those who bought a virtual item did so in a game, 38% purchased on the game's website, 16% through an e-commerce site, and 8% from another player.

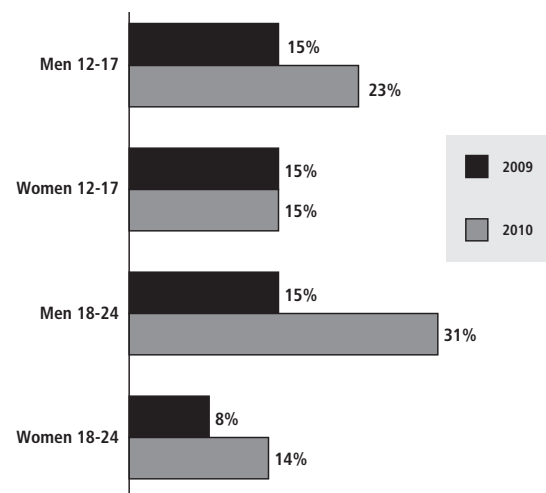
Credit cards and PayPal (51% each) are the top forms of payment; 16% have used Facebook credits and 10% have completed surveys or filled out forms in order to receive a virtual item (multiple responses permitted).

REASONS PLAYERS PURCHASE VIRTUAL GOODS, 2010



**SOURCES:** Frank N. Magid Associates, PlaySpan

AGE GROUPS OF THOSE WHO PURCHASE VIRTUAL GOODS, 2009-2010



**SOURCES:** Frank N. Magid & Associates, PlaySpan

**SOURCES:** Frank N. Magid Associates, Mike Vorhaus, President Magid Advisors, 1775 Broadway, #1401, New York, NY 10019; 212-974-2310; mvorhaus@magid.com; www.magid.com.

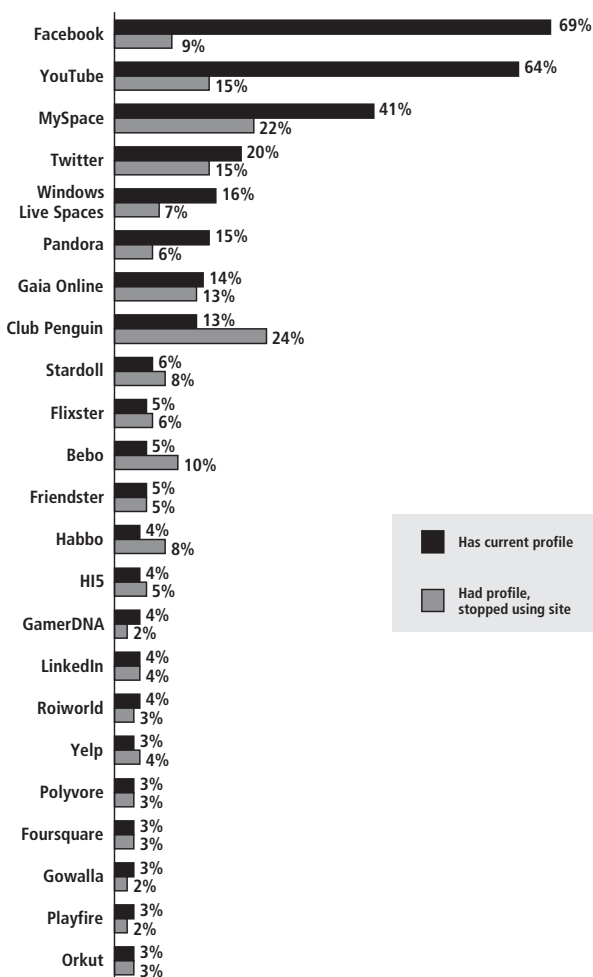
PlaySpan, Gus Perez, Director Business Development, 2900 Gordon Ave., #201, Santa Clara, CA 95051; 408-617-9155; gus.perez@playspan.com; www.playspan.com.

## Teen Social Networking Behaviors

Teens spend two hours 20 minutes a day on the Internet, with the bulk of that time (one hour and 50 minutes) spent on social networks, according to Roiworld, a fashion-based virtual world backed by A&E TV Networks Digital. Nine in 10 teens (90%) have a profile on at least one social site, with Facebook, unsurprisingly, as the most likely site.

**Virtual currency.** 61% of teens feel spending real money on virtual products is a waste of money. However, more than four in 10 teens (43%) have spent money on or in a social network; 49% use their allowance and 55% consider it mon-

TEENS ON SOCIAL NETWORKS, CURRENT VS. ABANDONED PROFILES



SOURCE: Roiworld

## WHAT TEENS HAVE PURCHASED ON OR IN A SOCIAL NETWORK, 2010

Points, credits to buy virtual items in game	35%
Music/tracks	33%
Clothing, accessories for avatar in game	30%
Points, credits to advance in game	23%
Virtual pet	23%
Virtual items to help advance in game	19%
New levels, maps for game	16%
Virtual gift to someone else	16%
Online subscription to play game	16%
Themes, wallpaper	14%
Complete game download	14%
New expansion pack/sequel	14%
Game demo	12%

SOURCE: Roiworld

## REASON TEENS CITE FOR LAPSED FACEBOOK USAGE, 2010

Lost interest/it's boring	45%
More interested in visiting other sites	28%
Too many notifications	27%
Most friends don't use Facebook	21%
Tired of keeping up with the activity	21%
Too many ads	20%
Trouble finding friends on site	18%
Friends using other sites	16%
Prefer other sites	16%
Doesn't offer desired features	16%
Parents joined	16%
Lost its novelty	14%
Too many adults/older people	14%
Uncomfortable with personal information being displayed	13%
Dislike changes Facebook has implemented	12%
Dislike the people met on site	11%
Attracts too many young people	7%

SOURCE: Roiworld

ey well spent. One in three haven't purchased items because they don't have a credit card (34%) and another 32% say their parents don't like them spending money on virtual products.

**Gamers.** Three in four teen social network users (73%) play games on game sites. Teens spend twice as much time playing games on Facebook and MySpace (six hours a week) as on specific gaming sites such as Yahoo! Games or AddictingGames.com (fewer than 2.5 hours per week). They view games as a way to relax (73%), an inexpensive way to have fun (63%), and to interact with friends (61%). That said, one in four feel social network games are "too basic" (26%) and "not challenging enough" (28%).

**Facebook fatigue.** Teens are beginning to show signs of "Facebook fatigue," according to the report. One in five Facebook users (19%) have stopped using the site or are visiting it less frequently. Two in three (68%) started decreasing their time there within the prior six months. Nearly half of the lapsed users (45%) stopped going to the site because they

got bored, while 28% are more interested in visiting other websites. One in six (16%) stopped because their parents joined.

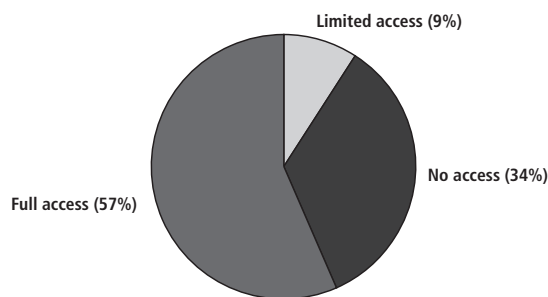
**SOURCE:** Roiworld (AETN Digital), Jen Duddy, 111 8th Ave., New York, NY 10011; jen.duddy@aetn.com; www.roiworld.com.

## Most Parents Granted Full Facebook Access By Teens

More than half of high school students (56%) allow their parents to have full access to their Facebook profiles, including status updates and party photos, according to Kaplan Test Prep and Admissions. One in three (34%) allow their parents no access, while 9% allow their parents to have limited access. Moms (56%) are more likely than dads (49%) to be granted full access.

However, 58% of teens say their parents do not use Facebook, with dads less likely than moms to have their own profiles (27% vs. 35%).

FACEBOOK ACCESS GRANTED TO PARENTS BY TEENS



**SOURCE:** Kaplan Test Prep and Admissions

**SOURCE:** Kaplan Test Prep and Admissions, Russell Schaffer, 888 7th Ave., New York, NY 10106; 212-453-7538; russell.schaffer@kaplan.com; www.kaplan.com.

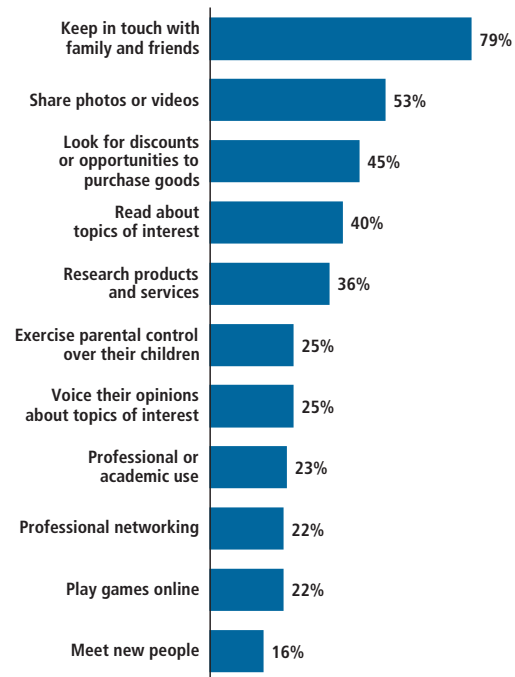
## Hispanic Women Have Various Reasons For Using Social Media

The vast majority of Hispanic women in the U.S. (85%) have accessed social networks, including 58% who do so daily, according to Sophia Mind. That is slightly fewer than Argentinean, Brazilian, and Mexican women.

Among Hispanic women in the U.S. who access social networks, they use Facebook (92%), MySpace (35%), Twitter (26%), LinkedIn (14%), and Classmates (11%).

The reasons Hispanic women use social networks differ by country. While women in each country most commonly use such sites to keep in touch with friends and family, Hispanic women in the U.S. are more likely than women in other countries to use the sites to share photos, look for shopping deals, and play games. They are less likely to use them for professional or academic reasons.

ACTIVITIES FOR WHICH SOCIAL NETWORKS ARE IMPORTANT TO HISPANIC WOMEN IN THE U.S., 2010



**SOURCE:** Sophia Mind

Hispanic women overall say social networks could be improved by providing a greater sense of the Latina community (38%), by offering more content that is appealing to them (31%), and by getting more Hispanic women to participate (29%).

**SOURCE:** "The Use Of Social Networks By Latin Women," Sophia Mind, Rue Visconde de Pirajá 572, 3rd Fl., Rio de Janeiro, RJ 22410 Brazil; +55 21-3206-9280; www.sophiamind.com. Price: Available online at no charge.

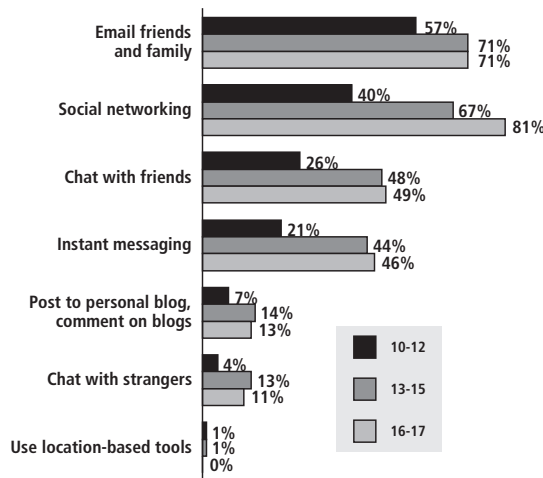
## Teen Online Habits Vary By Age Group

Teens, regardless of their age, primarily access the Internet via their desktop computer, according to McAfee and Harris Interactive. But those ages 13-15 are more likely than ages 10-12 and 16-17 to go online via a cell/smart phone (31%, 11%, 27%) or a videogame console (24%, 20%, 18%).

There are significant gender differences in Internet habits and behaviors. Girls, for instance, are more likely to access the Internet at a friend's or relative's house, and via a laptop computer or cell/smartphone. Boys are significantly more likely to go online using a videogame console.

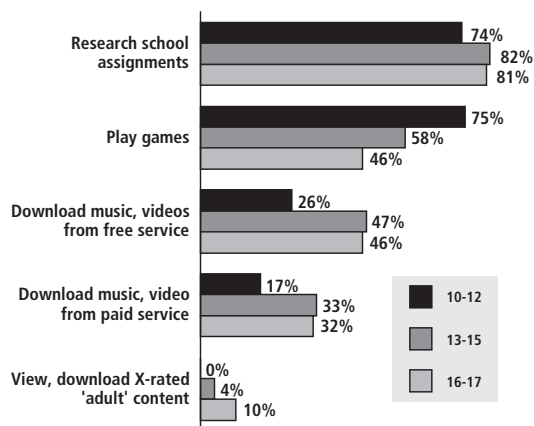
Nine in 10 teen girls (90%) and 80% of teen boys regularly engage in online communication. The percentage of those using social networks and instant messaging regularly increases as they age.

TEENS' ONLINE COMMUNICATION, BY AGE, 2010



SOURCES: McAfee, Harris Interactive

TEENS' ONLINE ACTIVITIES, BY AGE, 2010



SOURCES: McAfee, Harris Interactive

## Blogging And Chatting

Those who blog or post comments on other blogs doubles between ages 10-12 (7%) and 13-15 (14%). Similarly, those who chat online with people they don't know also significantly rises between ages 10-12 (3%) and 13-15 (13%).

More than half of 10-17-year-olds download some kind of media online. Those who download music or videos for free nearly doubles between ages 10-12 and 13-15 (26% vs. 47%). Those aged 10-12 (75%) are more likely than ages 13-15 (58%) and ages 16-17 (46%) to play games.

SOURCES: Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

McAfee, Kim Eichorn, 3965 Freedom Circle, Santa Clara, CA 95054; 408-346-3606; kim\_eichorn@mcafee.com; www.mcafee.com

## Teen Social Media Influencers Popular Online And Offline

The top 15% of teen Internet users — deemed “social media influencers” — have particularly different online behaviors than other teens. Most notably they spend more time socializing and influencing their peers offline, according to myYearbook and Ketchum.

These social media influencers are 40% more likely to have attended a party over the last weekend and 20% to have had a friend come over to visit over the past weekend.

Among teen social media influencers:

- ▶ 97% spend at least two hours a day on a social networking site.
- ▶ 91% have more than 500 online “friends.”
- ▶ 16% use a location-based mobile application, such as Foursquare or Gowalla.
- ▶ 87% share information about their favorite products with friends, compared to 50% of teens in general.
- ▶ 52% trust their friends' recommendations, 9% trust an adult's.
- ▶ 88% text and 79% are online while watching TV.
- ▶ 56% of social influencers aged 13-14 “hate it” or are “annoyed” when their parents “friend” them online. However, only 27% of influencers aged 18-19 feel the same way.

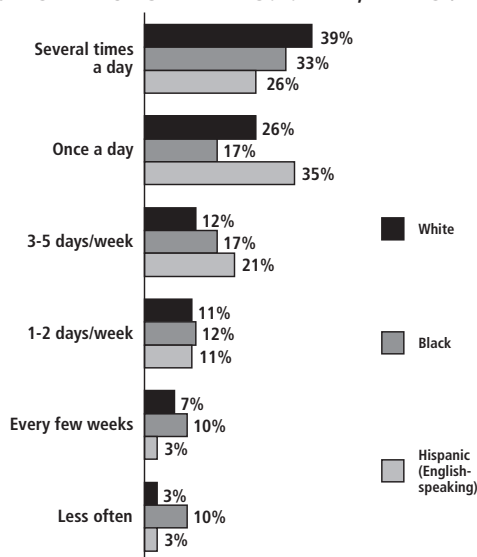
SOURCE: myYearbook.com, Bill Alena, SVP Advertising, 280 Union Square Dr., New Hope, PA 18938; 215-862-1162; balena@myyearbook.com; www.myyearbook.com.

## Teen Internet Usage: The Specifics

Teen girls who use the Internet are nearly twice as likely as teen boys to also use Twitter (13% vs. 7%), according to the Pew Internet & American Life Project. Twitter remains pretty much the only technology that teens haven't overwhelmingly adopted. Some 93% of teens aged 12-17 go online, and 75% have a cellphone. Also:

- ▶ 32% of teens access the Internet at home via a cable

## FREQUENCY TEENS AGED 12-17 GO ONLINE, BY RACE/ETHNICITY



SOURCE: Pew Internet & American Life Project

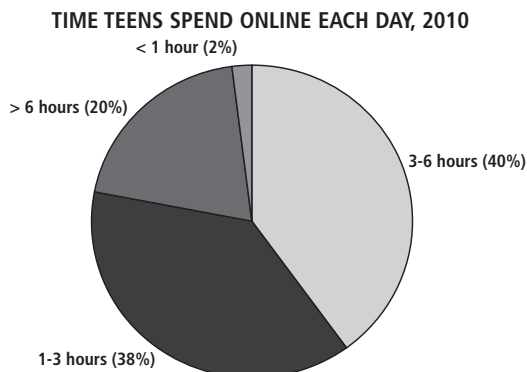
modem, 30% use a DSL-enabled phone line, 11% have wireless access, and 10% use dial-up.

- ▶ 62% of teens who use the Internet get news about current events and politics online.
- ▶ 48% of online teens purchase products such as books, clothing, or music, online, up from 31% in 2000.
- ▶ 31% of online teens get health, diet, or wellness information from the Internet; 17% go online to seek answers to more personal health questions such as information about drug use.

SOURCE: Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

## What Teens Do Online

Four in 10 teens (40%) spend 3-6 hours online each day. Facebook is their most visited website (41%), followed by



SOURCE: Buzz Marketing

Flickr (34%), YouTube (31%), Google (25%), Twitter (25%), and MySpace (21%) finds Buzz Marketing.

The largest number of teens have two email accounts (41%), while 23% have only one, 21% have three, and 15% have more than four. Nearly eight in 10 (79%) check their email multiple times a day. That said, email is the least likely way they stay in contact with their friends. Text messaging, by far, is their preferred method of communication (51%), followed by meeting in person (29%), via Facebook (25%), and talking on the phone (6%).

Slightly more than half of all teens (55%) have Twitter accounts. Teen girls are slightly more likely than teen boys to have a Twitter account (51% vs. 49%).

SOURCE: Buzz Marketing, Tina Wells, CEO, 1018 Laurel Oak Rd., #1, Voorhees, NJ 08043, 856-346-3456; tina@buzzmg.com; www.buzzmg.com.

## Changing Habits Among Online Youth

What college students do online differs from teens, according to the Center for Media Design and ExactTarget. Two in 10 girl high school students (19%) go online to shop, though only 4% search out online deals. However, as college students, 27% of girls specifically search for deals online.

More than half of all teens and young adults (55%) use the Internet to communicate with friends and family. Girls in high school are twice as likely as girls in college to socialize with online friends (42% vs. 24%). Similarly, 59% of boys in high school say communicating with friends and family online is a primary reason for using the Internet, compared to 28% of male college students.

Boys in high school are significantly more likely than their girl counterparts to use the Internet strictly for research and information (18% vs. 7%).

SOURCE: ExactTarget, Morgan Stewart, Principal, Marketing Research, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; www.exacttarget.com.

## Report: Students Only Care If Website Is First Result On Google

Students place more importance on a search engine's site ranking than any other factor including a website's content or layout, according to Northwestern University research. Teens and young adults feel that since Google is credible its search results are also credible.

Students also believe websites ending in .gov, .edu, and .org are more credible than those ending in .com. Most are unaware that .org can be registered by anyone, thus not different than .com sites.

SOURCE: "Trust Online: Young Adults' Evaluation of Web Content," Northwestern University, Eszter Hargittai, Author, contact06@eszter.com.

## Teen Texting With Friends On The Rise

The number of teens aged 15-17 who say texting is their primary form of written communication with friends has doubled between 2008 and 2009 (21% vs. 43%), according to ExactTarget. Email is the second most commonly used form of written communication (18%), followed by instant messaging (10%).

Both genders use social networks at about the same rate (10% for boys, 11% for girls). However, this changes at age 18 when women are almost twice as likely as men to favor written messages through social networks (27% vs. 15%).

### PERFERRED WRITTEN COMMUNICATION METHOD FOR TEENS WHEN COMMUNICATING WITH FRIENDS, 2009

Texting .....	43%
Email .....	18%
Instant messaging .....	12%
Social networking .....	10%

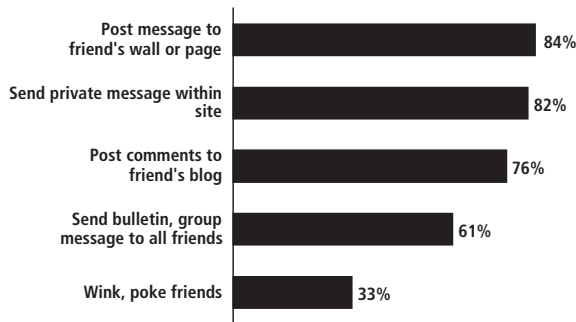
SOURCE: ExactTarget

SOURCE: ExactTarget, Morgan Stewart, Director, Research and Strategy, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; www.exacttarget.com.

## Teens Likely To Post Open Messages To Friends

Teens are slightly more likely to post open messages to friends than to send private messages on social networking sites, according to the Pew Research Center. They are less enamored with “poking” or “winking” their friends.

### HOW TEENS COMMUNICATE WITH FRIENDS ON SOCIAL NETWORKING SITES



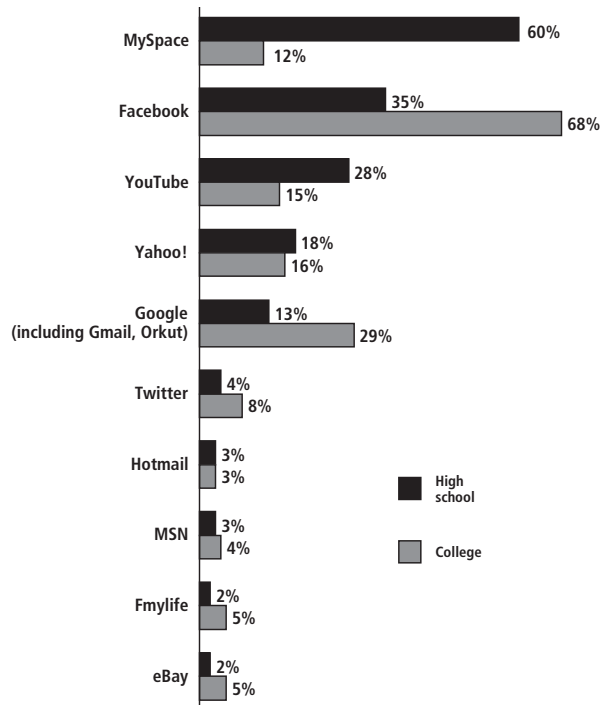
SOURCE: Pew Research Center's Internet & American Life Project

SOURCE: Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

## Dell Rules Among Youth Computer Ownership, But Apple Looms On Wish Lists

Three in 10 high school (30%) and 31% of college students own Dell laptop computers, while 4% of high school and 23%

### STUDENTS' FAVORITE WEBSITES, HIGH SCHOOL VS. COLLEGE



NOTE: Multiple responses permitted

SOURCE: Ypulse Research

of college kids own an Apple laptop, according to Ypulse Research. However, Apple rather than Dell is the most likely next computer brand purchase among both high school (22% vs. 20%) and college students (37% vs. 15%).

Some 13% of high school students pay for their own PC, yet it appears if parents pay, then they also decide what brand the student gets. Only 33% of students are allowed to decide what brand they would purchase.

As for college students, most are dependent on financing from a source other than themselves. Nearly six in 10 (58%) have their computer purchased for them entirely and 10% receive some financial assistance. One in three (36%) are also being influenced by the advice of others.

High school students select MySpace as their favorite website, while college kids prefer Facebook. Students apparently are finally learning to keep their social networking activities private. More than half of MySpace users (51%) and 54% of Facebook users have set their profiles to private.

SOURCE: Ypulse Research, Dan Coates, President, 130 William St., 6th Fl., New York, NY 10038; 888-292-8855, x2; dan@ypulse.com; www.ypulse.com.

## Hacking Is Easy, Say Teens

Four in 10 teens (39%) surveyed by Tufin Technologies think hacking is “cool” and 16% admit to trying it themselves. Only 15% have ever been caught or know someone who has. Eight in 10 hackers (80%) first did so by age 16, and

amusingly, 6% view it as a viable career path. Facebook is the top target (20%), followed by their friends' email accounts (6%). Nevertheless, the majority (75%) feel hacking is wrong and 70% believe it should be considered a criminal offense.

The survey compared U.S. teen attitudes towards hacking with their UK counterparts. Three in 10 U.S. teens (30%) say it's easy to hack, nearly double the number of UK teens (18%) who believe hacking is simple.

#### WHERE TEENS HACK, U.S. VS. UK

	U.S.	UK
Bedroom	51%	27%
School	28%	21%
Someone else's machine	20%	21%
Internet cafe	6%	22%

**SOURCE:** Tufin Technologies

**SOURCE:** Tufin Technologies, Ruvi Kitov, CEO, 15 New England Executive Office Park, Burlington, MA 01803; 877-270-7711; sales@tufin.com; www.tufin.com.

## Friends Are More Trusted Than Parents With Passwords

One in four teens and young adults aged 14-24 (26%) have shared their passwords to Internet sites with someone else, according to an AP/MTV poll conducted by Knowledge Networks. A really close friend is the most likely confidante (54%), followed by mom (43%), dad (23%), a boyfriend (23%), and girlfriend (16%).

Up to a point, teens and young adults are cognizant of the import and duration of their online postings. One in three have frequently thought about how people are more likely to post things online than they would say offline, yet many have never considered that things they post may get them

#### INTERNET ACTIVITIES BY 14-24 YEAR OLDS DURING THE PREVIOUS WEEK

Sent, received email	88%
Visited social network site	76%
Read entertainment-related articles	61%
Read, posted comments on website	59%
Sent, received instant message	58%
Read current event news articles	53%
Played game	49%
Read blog	40%
Watched clips of TV show	39%
Shopped online	33%
Watched full episode of TV show	27%
Wrote, updated own blog	20%
Uploaded, shared video made by someone else	19%
Uploaded, shared video made by self	10%
Participated in online video chat	10%
Posted Twitter link	10%

**SOURCE:** MTV, AP, Knowledge Networks

in trouble with the police (53%), their school (46%), employer (46%), or parents (44%).

However, the majority (51%) realizes that what it posts may be a source of embarrassment or conflict. Some 54% realize that it's hard to know where pictures they share via the Internet or cell phone might end up.

**SOURCES:** Associated Press, Jack Stokes, 450 W. 33rd St., New York, NY 10001; 212-621-1739; jstokes@ap.org; www.ap.org.

Knowledge Networks, Martin Zagorsek, EVP Client Service, 440 Park Ave S., 6th Fl., New York, NY 10016; 646-742-5300; info@knowledgegenetworks.com; www.knowledgenetworks.com.

MTV Networks, Colleen Fahey Rush, EVP Research, 1515 Broadway, New York, NY 10036; 212-258-8000; www.mtv.com.

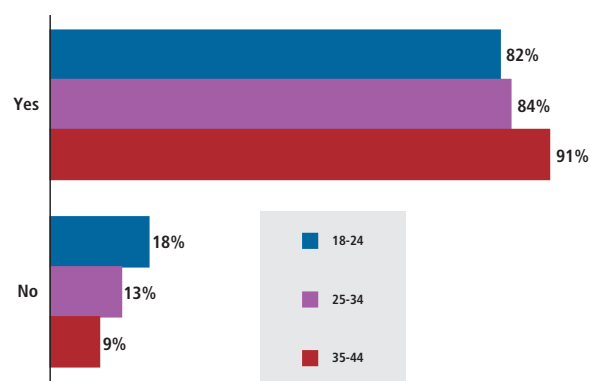
## Young Adults On Internet Privacy, Safety

Half of 18-24-year-olds (49%) have changed their mind about purchasing a product online because of a privacy or safety concern, according to research published by the Social Science Research Network. This compares to 55% of those aged 25-34 and 66% of those aged 35-44. [Teen habits typically mirror those of young adults.]

Young adults are concerned about online privacy, yet don't desire the government to regulate the issue. More than eight in 10 18-24-year-olds (84%) "strongly believe" anyone who uploads a picture of them to the Internet should first seek permission. More than half (54%) are more concerned about online privacy issues than they were five years ago, primarily because they know more about their online risks (42%) and they have more to lose now if their privacy was violated (32%).

However, 18-24-year-olds are less likely than their older counterparts to feel there should be a law requiring websites to disclose what they know about their users. Similarly, this younger group is also less likely than older ones to want a law ensuring websites and advertisers delete all stored information via cookies.

#### THOSE WHO HAVE REFUSED TO PROVIDE INFORMATION TO A BUSINESS BECAUSE IT WAS TOO PERSONAL OR NOT NECESSARY, 2010, BY AGE



**SOURCE:** Social Science Research Network

Three in 10 18-24-year-olds (31%) “hardly ever” read the privacy policies of websites and 33% often erase their cookies when using the Internet.

18-24-year-olds are significantly less likely to have checked their credit reports. Half (48%) have never done so, compared to 19% of older adults.

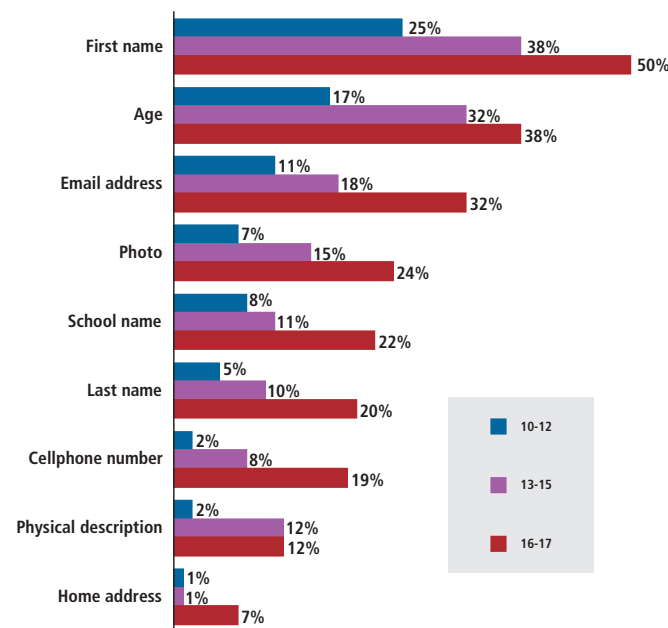
**SOURCE:** “How Different Are Young Adults From Older Adults When It Comes To Information Privacy Attitudes and Policies,” Social Science Research Network, Chris Jay Hoofnagle, Director, Berkeley Center for Law & Technology, 510-644-4327; choofnagle@law.berkeley.edu.

## Younger Teens Most Wary Of Online Strangers

More than four in 10 teens (43%) provide their first name to a stranger over the Internet in 2010, up from 38% who did so in 2008, according to McAfee and Harris Interactive. Those aged 16-17 (50%) are more likely to do so than those aged 14-15 (38%) or 12-13 (25%).

The number of teens who give their cellphone number to an online stranger has increased 50% from 2008 to 2010 (8% to 12%).

**PERSONAL INFORMATION GIVEN TO ONLINE STRANGERS BY 10-17-YEAR-OLDS, BY AGE**



**SOURCE:** McAfee, Harris Interactive

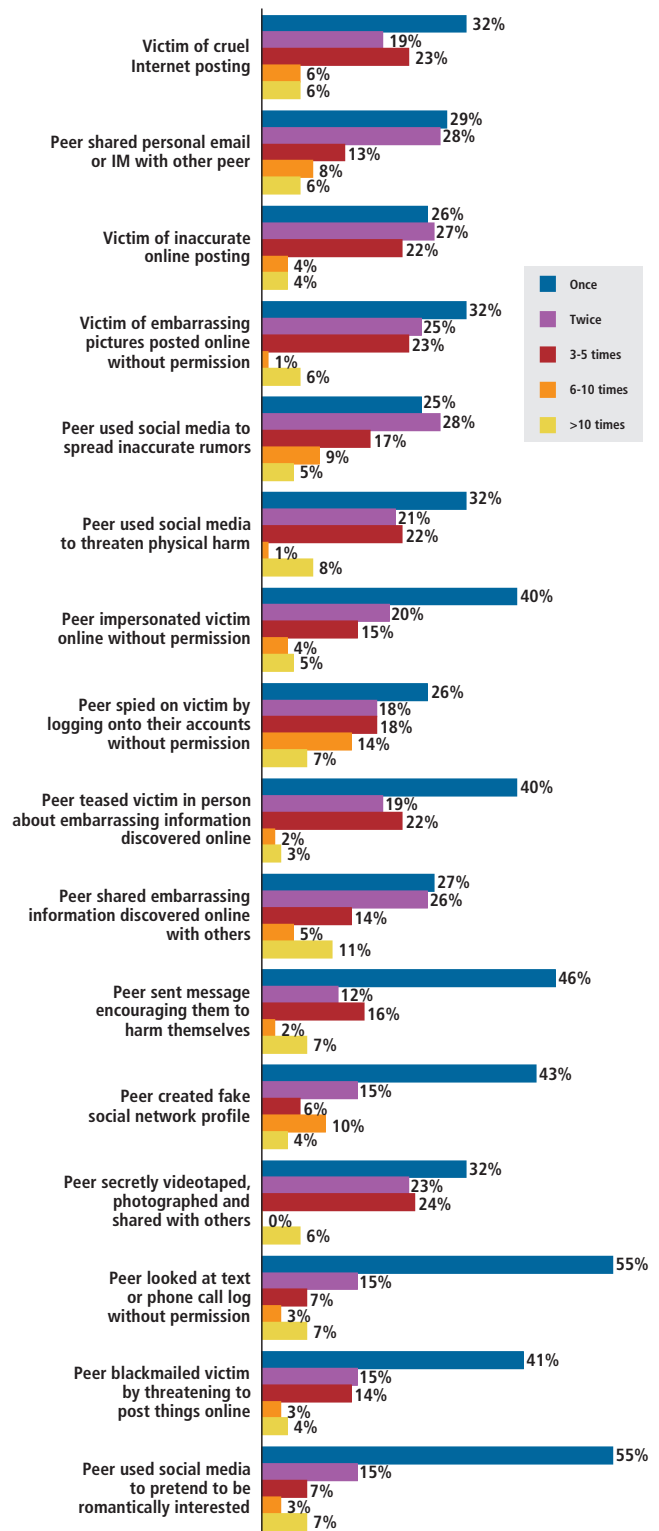
**SOURCES:** Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

McAfee, Kim Eichorn, 3965 Freedom Circle, Santa Clara, CA 95054; 408-346-3606; kim\_eichorn@mcafee.com; www.mcafee.com.

## Digital Abuse? A Problem Or Fact Of Life?

Although 76% of teens and young adults aged 14-24 believe digital abuse is a serious problem, a full 64% say it

**FREQUENCY OF SELECT ONLINE AND DIGITAL ABUSE, 14-24-YEAR-OLDS**



**SOURCE:** MTV, AP, Knowledge Networks



doesn't affect them at all, and another 28% believe these things are "just a part of life" and "people shouldn't get worked up about them," according to an AP-MTV poll conducted by Knowledge Networks.

A majority of teens and young adults (72%) also claim that peers who share naked pictures online or via the Internet are a serious concern. In fact, most don't want to see them, labeling the behavior stupid (64%), dangerous (54%), uncomfortable (48%), and gross (41%). Less than one in six consider it sexy (14%) or hot (10%).

**SOURCES:** Associated Press, Jack Stokes, 450 W. 33rd St., New York, NY 10001; 212-621-1739; jstokes@ap.org; www.ap.org.

Knowledge Networks, Martin Zagorsek, EVP Client Service, 440 Park Ave S., 6th Fl., New York, NY 10016; 646-742-5300; info@knowledgenetworks.com; www.knowledgenetworks.com.

MTV Networks, Colleen Fahey Rush, EVP Research, 1515 Broadway, New York, NY 10036; 212-258-8000; www.mtv.com.

## The Downside Of Tech-Savvy Teens

Nearly half of teens and young adults aged 14-24 (45%) say they sometimes or frequently see or read people being mean to one another on social networking sites, according to an AP-MTV poll conducted by Knowledge Networks. Three in 10 (29%) often or sometimes receive text messages that contain gossip or rumors about a peer.

However, they also don't put up with these types of behaviors. Half (48%) are very likely or somewhat likely to tell another online user to stop being mean to someone.

**SOURCES:** Associated Press, Jack Stokes, 450 W. 33rd St., New York, NY 10001; 212-621-1739; jstokes@ap.org; www.ap.org.

Knowledge Networks, Martin Zagorsek, EVP Client Service, 440 Park Ave S., 6th Fl., New York, NY 10016; 646-742-5300; info@knowledgenetworks.com; www.knowledgenetworks.com.

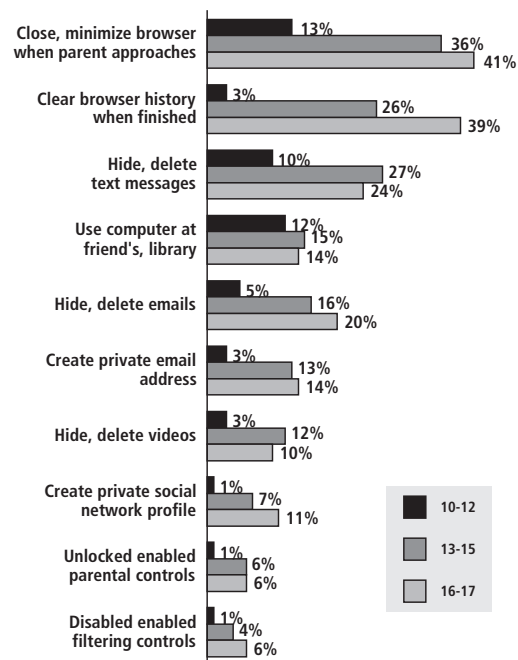
MTV Networks, Colleen Fahey Rush, EVP Research, 1515 Broadway, New York, NY 10036; 212-258-8000; www.mtv.com.

## Teens Conceal Online Behaviors

Teens may be close with their parents, but that doesn't mean they are completely transparent with them. Half of 13-15-year-olds (54%) and 56% of 16-17-year-olds hide what they do online from their parents, according to McAfee and Harris Interactive. Teens typically clear browsers, delete text messages, and create private email addresses.

At the same time, parents aren't monitoring their teens as well as they do their younger children. Whereas 94% of parents check up on their tweens' online activities, only 55% check their teens' activities. Parents are also more likely to know passwords, check browser history, and keep the computer in a public space with tweens than with teens. Most parents know how to keep tabs over their teen's Internet activities. Only 33% of parents of 16-17-year-olds, 23% of parents of 13-15-year-olds, and 10% of parents of 10-12-year-olds say they are clueless about the Internet.

### TEEN ONLINE BEHAVIOR HIDDEN FROM PARENTS, 2010



**SOURCE:** McAfee

The main reason for the lack of parental observation is time. Nearly half of parents of 16-17-year-olds (45%) admit they don't have time to monitor activities, while 27% of parents of 13-15-year-olds, and 10% of parents of 10-12-year-olds say the same.

**SOURCES:** Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

McAfee, Kim Eichorn, 3965 Freedom Circle, Santa Clara, CA 95054; 408-346-3606; kim\_eichorn@mcafee.com; www.mcafee.com

## Schools Rely On Filters To Protect Students

The most commonly asked questions by K-12 students regarding cyber-ethics, cyber-safety, and cyber-security center on dealing with harassing messages and cyber-bullying, according to National Cyber Security Alliance and Zogby. Plagiarism and sexting also are frequently discussed in the classroom.

The majority of school administrators (84%), technology coordinators (83%), and teachers (65%) feel school districts are doing an adequate job to prepare students on Internet safety. All three say filters are the most used mechanism to ensure appropriate use of the Internet.

**SOURCE:** National Cyber Security Alliance, Michael Kaiser, Executive Director, 1010 Vermont Ave. NW, #821, Washington, DC 20005; info@staysafeonline.org; www.staysafeonline.org.

## factoids

- ▶ Some 142 million Americans used **social media** — such as Facebook, Twitter, and blogs — in December 2009, spending in excess of six hours on such sites during the month. (*Nielsen; phone: 646-654-5000*)
- ▶ The number of unique viewers of **online video** grew to 142.7 million in January 2010, up 5.2% from the prior year. (*Nielsen Company; phone: 646-654-5000*)
- ▶ A majority of Americans (57%) go online when they want **news** immediately, and more visit a news aggregator such as Google News (31%) than visit newspaper websites (8%). (*Outsell; phone: 650-342-6060*)
- ▶ Half of shoppers aged 25-34 (50%) say **search engines** are a valuable information source when making purchase decisions, compared to 39% of shoppers overall. (*ARANet; phone: 301-987-2513*)
- ▶ A majority of 13-14-year-old **social media influencers** (56%) — defined as the most active and engaged social media users — are scared, anxious, or upset when their parents friend them online, compared to 27% of 18-19-year-old social media influencers. (*Ketchum; phone: 646-935-3910*)
- ▶ More than two thirds of **social network users** (68%) have become a “fan” or “friend” of a product, service, company, or musical group, up from 57% a year prior. (*Experian Simmons; phone: 954-246-8220*)
- ▶ Three quarters of consumers (75%) are more trusting of companies that post to **Twitter** than companies that do not. (*Fleishman-Hillard; phone: 202-828-9740*)
- ▶ A majority of online Americans (57%) read an **online newspaper**, with those page views accounting for about 1% of total Internet traffic. (*comScore; phone: 312-775-6510*)
- ▶ Seven in 10 online Americans say **Internet ads** are annoying, however 55% would rather see ads than pay for online content. (*USC Annenberg Center for the Digital Future; phone: 310-962-6001*)
- ▶ Most online Americans (57%) read an **online newspaper** in May 2010, viewing an average of 43 pages during the month; *The New York Times*, with 26% of online news traffic, is the most popular online newspaper. (*comScore; phone: 312-775-6510*)
- ▶ More than half of online Americans (54%) have occasionally used a mobile device to **act upon an email** they received while using their desktop PC. (*e-Dialog; phone: 888-256-7687*)
- ▶ The greatest barrier to Americans always doing all they can to protect their **personal information online** is lack of knowledge (28%), followed by cost (12%), and lack of time (5%). (*National Cyber Security Alliance; phone: 202-570-7431*)

### FAST FACTS:

#### Online Security

- ▶ 81% of Americans are concerned about the security of their personal information online.
- ▶ 61% believe they are careful about sharing personal information and details, whereas 32% think they should be more cautious.
- ▶ Yet, only 38% read websites’ terms and conditions when sharing personal information with that site.
- ▶ 31% expect to be the victim of a cyber attack within the coming five years.

**SOURCE:** Harris Interactive; phone: 212-539-9600

- ▶ Nearly four in 10 **online shoppers** (39%) have used PayPal to make a purchase in 2010, surpassing the use of debit cards (37%); credit cards remain the most popular form of payment, with 70% using them for online purchases. (*Aurimedia Consulting Group; phone: 212-323-7000*)
- ▶ The **Internet and community** go hand-in-hand: 22% of online Americans have signed up to receive digital alerts about local issues — such as traffic, weather, and school events — 20% use digital tools to keep in touch with their neighbors, and 11% read a blog that addresses community concerns. (*Pew Internet & American*)
- ▶ Children aged 12-17 (89%) and their parents (72%) agree that students with **wireless Internet access** in their homes have an easier time completing school assignments, though 90% of parents also note that they would closely monitor their children’s wireless Web activities. (*Cisco; phone: 949-823-4778*)
- ▶ Some 76% of parents have friended their teenage child on a **social network**, but 29% of teens would unfriend their parent if they felt they had the choice. (*AOL; phone: 703-265-6139*)
- ▶ Nearly 57 million Americans aged 6 and older (or 20%) have **played a game** on a social networking site in the prior three months; 53% of those were female and 47% male. (*NPD Group; phone: 516-625-2277*)
- ▶ One in six **Twitter** users (16%) first used the social media site by accessing it from their mobile phone as of September 2010, up from 5% in April 2010. (*Twitter; phone: 866-924-2008*)
- ▶ A majority of those who use social networks (58%) say advertising and “junk” is an obstacle to increasing their level of engagement with **social media**. (*Strativity; phone: 201-843-1315*)
- ▶ More than eight in 10 **gay men** aged 18-29 (81%) check Facebook daily, compared to 37% of gay men aged 45-59. (*Community Marketing Inc.; phone: 415-437-3800*)

- ▶ Some 142 million Americans used **social media** — such as Facebook, Twitter, and blogs — in December 2009, spending in excess of six hours on such sites during the month. (*Nielsen; phone: 646-654-5000*)
- ▶ Some 45% of people have blocked or defriended a person on a **social network** because of uncivil comments or behavior. (*Weber Shandwick; phone: 212-445-8314*)
- ▶ A majority of shoppers (57%) plan to buy at least one **Christmas or Hanukah gift** online in 2010, and 80% of those who bought online last year plan to buy the same proportion or more holiday gifts online in 2010. (*Burst Media; phone: 781-852-5291*)
- ▶ Nearly half of Americans (45%) visited **Facebook** in the prior month; single and married adults under age 35 and who do not have children (68% and 61%, respectively) are the most likely to visit the site at least monthly. (*The Media Audit; phone: 800-324-9921*)
- ▶ Six in 10 Americans aged 46 to 76 (60%) believe that a **broadband Internet connection** at home is the most essential media service. (*Continuum Crew; phone: 415-295-4575, x12*)

**FAST FACT:****Bicultural Hispanics**

- ▶ 85% of bicultural Hispanics have Internet access at home, and 79% go online daily.

**SOURCE:** Bank of America; phone: 704-388-5770



# opinion

Tough times take a negative toll on the American spirit, and most believe the economy is still in recession as of 2010. Fewer than half of Americans think they can achieve the American Dream, with Whites more optimistic than Blacks and Hispanics about doing so.

One reason for their negativity is that nearly half of Americans no longer believe it is possible to work hard and get rich. Most also believe that the country is declining as a world power.

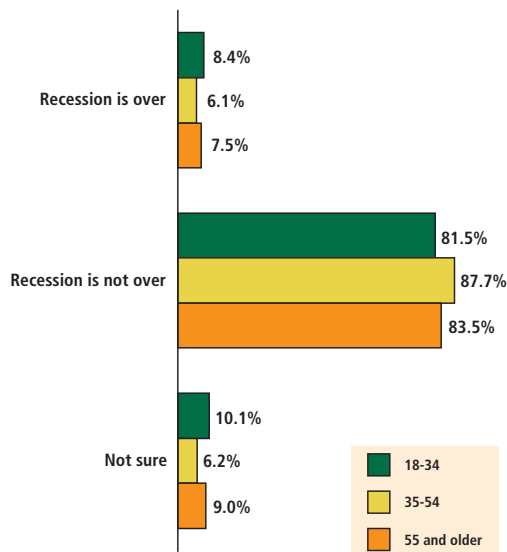
Some American sentiments have not changed. Americans still like big cars, big homes, and big meals. They also continue to support gambling in the form of state lotteries, and most have gambled in a casino.

## Recession Over? Americans Say 'No'

Although Ben Bernanke, chair of the Federal Reserve, announced that the recession is over, only 7% of Americans agree, finds BIGresearch. Conversely, 85% think it is not over, and 8% are not sure.

Women are more likely than men to say the recession is not over (86% vs. 83%) or to be unsure if it is over (9% vs. 7%). Those aged 18-34 are the most likely to believe the recession is over, while those aged 35-54 are the most likely to think it is not over.

CONSUMERS' VIEW OF THE RECESSION, 2010



SOURCE: BIGresearch

SOURCE: "American Pulse Survey, February 2010," BIGresearch, Phil Rist, VP Strategic Initiatives, 450 W. Wilson Bridge Rd., #370, Worthington, OH 45085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com.

## Most Believe American Dream Is Possible, But America Isn't The Country It Used To Be

A slight majority of Americans (52%) believe they are living the "American Dream" in 2010, according to StrategyOne. Among those who do not think they are living the dream, 56% believe they never will.

The vast majority of Americans (74%) believe that it's possible to achieve the American Dream and "make it," as opposed to the dream being an impossible myth. Blacks (78%) and Hispanics (76%) are more likely than Whites (73%) to think the dream is possible.

Nearly three quarters of Americans (74%) think that the key to achieving success in America is hard work, compared to 26% who think one needs to have lots of luck. Those with annual household incomes of less than \$25,000 (71%) and \$25,000 to \$40,000 (69%) are less likely than those with annu-

al household incomes of \$75,000 or more (78%) to think that hard work is the key to success.

Despite their optimism about the American dream, 68% of Americans believe the country's power in the world is fading. Nearly half (49%) believe countries such as China and India have pulled far ahead of America in so many ways that the country may not be able to catch up. In addition, 44% of adults think that teens in 2010 will see more war and violence in their lifetimes than they have, and 33% believe people will be less healthy in 10 years than they are in 2010.

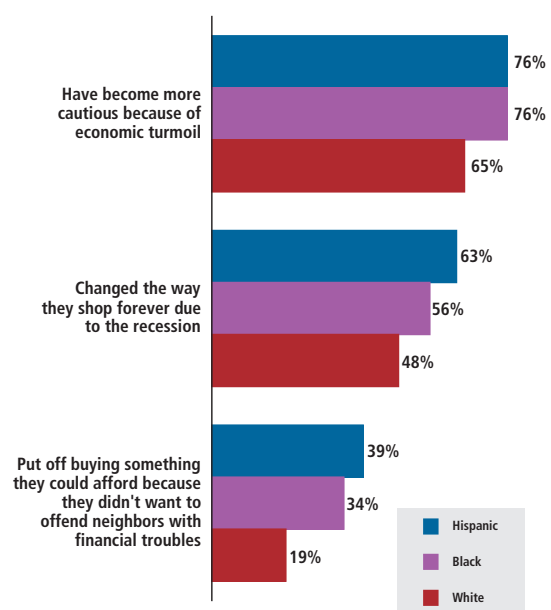
SOURCE: "Public Opinion Survey: The 'American Dream' In Today's Economy," StrategyOne, Bradley Honan, SVP, 250 Hudson St., 16th Fl., New York, NY 10013; 212-704-8295; bradley.honan@strategyone.net; www.strategyone.net.

## 'American Dream' Is Unattainable, But Cultural Diversity Is Delightful

Most Americans think the "American Dream" has become an impossible imaginary goal as opposed to a real ideal that can be achieved, according to The Futures Company. Hispanics (76%) and Blacks (75%) are more likely than Whites (68%) to think the American Dream is unattainable. Most Hispanics (66%), Blacks (62%), and Whites (53%) feel they need to take whatever they can get because no one is going to give them anything.

Despite their negativity on the American Dream, the vast majority says that one of the best things about the country is its cultural diversity, including 84% of Blacks, 82% of Hispanics, and 78% of Whites.

ATTITUDES TOWARD SPENDING IN REACTION TO THE RECESSION, BY RACE/ETHNICITY, 2010



SOURCE: The Futures Company

**SOURCE:** "Yankelovich Multicultural Study 2010," The Futures Company/Yankelovich, Sonya Suarez-Hammond, VP Multicultural Insights, 400 Meadowmont Village Circle, #431, Chapel Hill, NC 27517; 919-932-8858; ssuarez-hammond@yankelovich.com; www.yankelovich.com. Price: Call for information.

## Whither American Optimism? Withering

Nearly half of Americans (49%) do not believe that it is possible to simply work hard and get rich, while 32% think that it could happen, according to Rasmussen Reports. They are more optimistic about the possibility that anyone who wants to work could find a job (45%), though that proportion has slipped from 50% in the prior year. A slight majority believes a person could work his or her way out of poverty (53%).

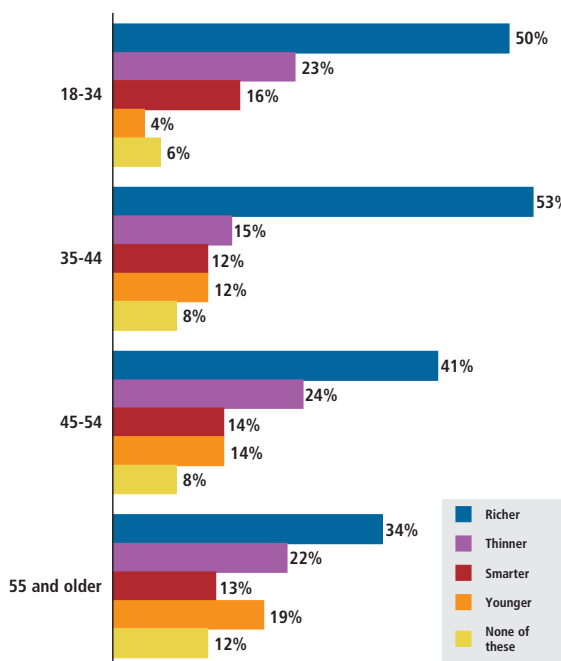
Only about one in five (21%) believe that today's children will be better off than their parents, down from 27% in January 2009.

**SOURCE:** Rasmussen Reports, Scott Rasmussen, President, 625 Cookman Ave., Asbury Park, NJ 07712; 732-776-9777; info@rasmussenreports.com; www.rasmussenreports.com. Price: Toplines available online at no charge, detailed findings available with subscription.

## Americans Want Wealth Over Youth, Beauty

Given the choice, Americans would rather be richer (43%) than thinner (21%), smarter (14%), or younger (12%), according to Harris Interactive. About one in 10 (9%) would not choose any of these options. Women (29%) are more

WOULD AMERICANS RATHER BE RICHER, THINNER, SMARTER, OR YOUNGER?, BY AGE, 2010



**SOURCE:** Harris Interactive

than twice as likely as men (14%) to choose to be thinner, whereas men are more likely than women to choose to be richer (46% vs. 41%) and younger (16% vs. 8%).

Adults of all ages would most commonly choose money over other options. However, those aged 55 and older are more split in their preferences; they are also most likely to say they would not choose to change themselves or their lives in those ways. Those younger than 45 strongly prefer money to other options.

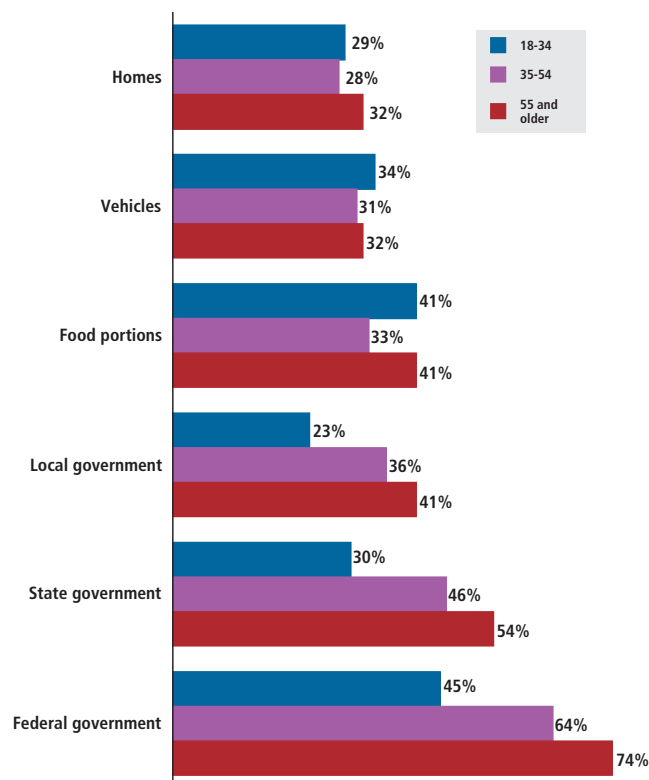
**SOURCE:** "Harris Poll: Would Americans Rather Be Younger, Thinner, Richer, or Smarter?" Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

## Big Isn't Bad For Homes, Cars, Or Meals

Fewer than four in 10 Americans think that homes (29%), vehicles (32%), and meal portions (38%) are "too big," finds BIGresearch. Their opinion is the opposite toward government, with 61% claiming that the federal government has become too big. Fewer say the same of state government (43%) and local government (34%).

Those aged 55 and older are more likely than their younger counterparts to believe things in America have gotten too big, particularly in the case of government. Those aged 35-54 are least likely to think homes, cars, and food portions have become too big.

WHAT IS 'TOO BIG' IN AMERICA, BY AGE, 2010



**SOURCE:** BIGresearch

**SOURCE:** "American Pulse, August 2010," BIGresearch, Phil Rist, VP Strategic Initiatives, 450 W. Wilson Bridge Rd., #370, Worthington, OH 45085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Available upon request at no charge.

## Feeling Lucky? Americans Support Gambling

A slight majority of Americans (52%) are in favor of state run lotteries that generate revenue, down slightly from 56% in October 2009, finds Rasmussen Reports. Some 28% do not support state run lotteries, and 21% are undecided. Of those who have bought a lottery ticket, 62% are in favor of the games. Americans are more likely to think the state should run its lottery (50%) rather than a private company (26%). The remainder is undecided. [Ed: The large portion of Americans undecided about lotteries suggests that states need to educate their citizens about their lottery systems, including where the money comes from and where it goes.]

Two thirds of Americans (66%) have gambled in a casino. Nearly half of Americans (49%) believe that casino gambling has a negative effect on society, whereas 25% say its effect is positive, 20% say it is neither positive nor negative, and 6% are not sure. Despite few thinking gambling is good for society, 50% would support allowing casinos in their own state. Among those who have gambled, 59% are in favor of legalizing casino gambling in their state.

**SOURCE:** "Gambling," Rasmussen Reports, Scott Rasmussen, President, 625 Cookman Ave., Asbury Park, NJ 07712; 732-776-9777; info@rasmussenreports.com; www.rasmussenreports.com. Price: Toplines available online at no charge, detailed findings available with subscription.

## Government, BP Miss Mark On Gulf Clean Up

The majority of Americans believe that BP (67%) and the U.S. federal government (56%) have been untruthful in regard to the oil spill and clean up efforts in the Gulf, reports Zogby. Only 17% think that BP's response to the spill has been good, and 27% say the same of the federal government's response.

Americans' attitudes in August 2010 were somewhat less severe compared to May 2010. Fewer believe the spill will cause long-term environmental and economic damage (52% in August vs. 58% in May), and more believe the potential damage caused by the spill is being exaggerated (15% vs. 11%).

Although most believe that the spill will cause long-term damage, as of August, 55% say offshore drilling is still safe, reliable, and cost efficient, down slightly from May when 57% said so.

**SOURCE:** "Majority Don't Believe Government Or BP On Oil Spill," Zogby, Stephanie DeVries, Managing Editor, 901 Broad St., Utica, NY 13501; 315-624-0200, x273; steph@zogby.com; www.zogby.com. Price: Call for information.



## factoids

- Four in 10 Americans (40%) describe their **communities** as divided, 31% as intolerant, and 27% as untrusting. (*Fetzer Institute; phone: 269-375-2000*)
- Nearly three quarters of Americans (72%) expect the best outcome for their futures despite uncertain economic times, and 92% believe that **optimism** has a strong impact in keeping the country moving in the right direction. (*Pepsi-Cola; phone: 914-253-2964*)
- Most single women (75%) and men (69%) are more open to having an **interracial relationship** than in the past because the country has a Black president. (*Avalanche; phone: 212-721-3440*)
- Men (22%) are more likely than women (17%) to believe there are **aliens** on earth. (*Ipsos; phone: 416-324-2900*)
- Men (61%) are more likely than women (44%) to think a frugal **blind date** is smart or sexy. (*ING; phone: 302-467-6643*)
- Most Americans (57%) think that **retirement** will be an exciting new chapter in their lives, compared to only 6% who think it will be time for winding down. (*Glenworth Financial; phone: 804-662-2536*)
- Nearly six in 10 Americans (59%) are not confident in the government's ability to handle the **economic crisis**, and 55% believe their careers will be negatively impacted for the long-term because of the recession. (*Knights Of Columbus; phone: 203-752-4253*)
- The vast majority of Americans (86%) believe that **Congress** is not doing a good job as of mid-2010; and that includes a majority of supporters of Republicans (97%), Independents (90%), and Democrats (75%). (*Harris Interactive; phone: 212-539-9600*)
- According to a mid-June 2010 survey, Americans are nearly twice as likely to be in favor of **offshore oil drilling** to reduce dependency on foreign energy sources (62%) as they are to be against offshore drilling because of the potential negative effects on the environment. (*Ipsos Public Affairs; phone: 202-420-2016*)
- Some 80% of **voters** expect candidates to have websites, 54% expect them to post video to sites such as YouTube, 50% expect them to be on social networks, and 41% expect them to use Twitter. (*E-Voter Institute; phone: 858-688-0966*)



## pets

Dogs are the most common pet in America, followed by cats. A majority of Americans say the recession has not impacted their decision to keep a pet, and pet owners' spending has increased despite Americans' concerns about their budgets. Many pet owners consider their furry friends as members of the family, which explains their willingness to open their wallets for care and feeding expenses. Some ways in which Americans humanize their pets are keeping photos of their pets on their phone, dressing them up, and even attending birthday parties for pets.

Veterinary bills are the top cost of keeping a pet, and are one instance in which Americans balk at spending. While a few put their pets medical needs ahead of even their own, most pet owners question paying for a necessary medical procedure for their pet that costs more than a thousand dollars.

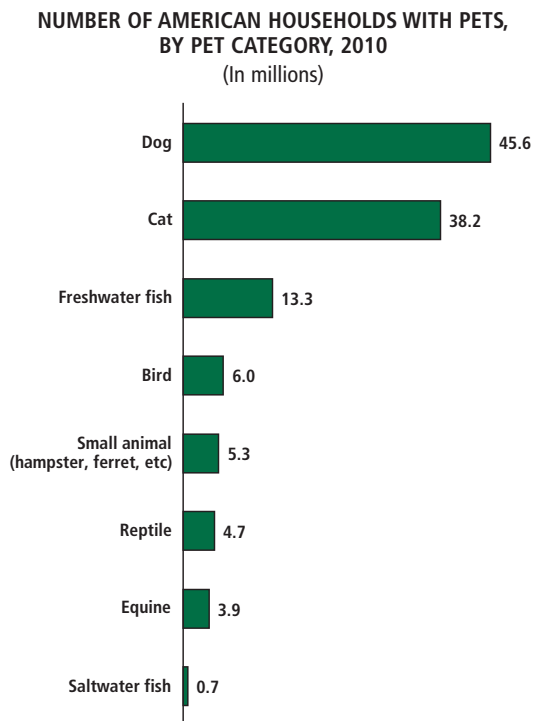
## They Don't Shoot Horses: Americans' Spending, Coddling Of Pets Has Increased During Recession

More than 71 million households (or 62% of Americans) have pets, up 17% from 61.2 million households in 1998, according to the American Pet Products Association. Households most commonly include cats (there are 94 million cats living in U.S. households) and dogs (78 million), but freshwater fish outnumber them (172 million), though only 13 million households have freshwater fish. Households with children account for 38% of pet-owning households, compared to 19% of American households without pets.

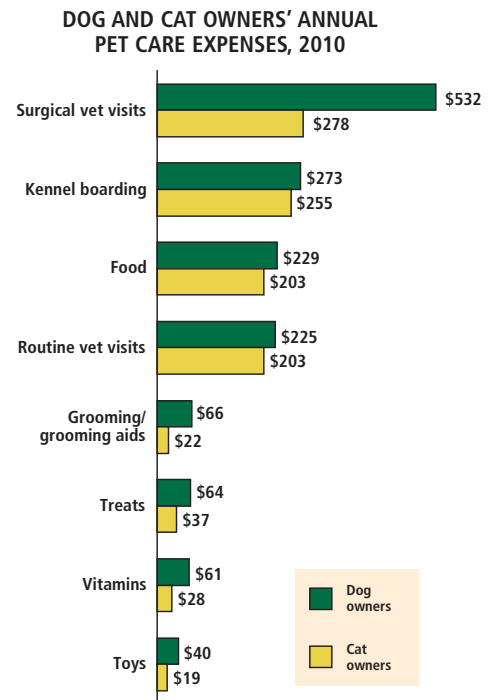
Americans will spend an estimated \$47.7 billion on their pets in 2010, up 4.9% over 2009. That breaks down to:

- ▶ \$18.3 billion on pet food;
- ▶ \$12.8 billion on veterinary care;
- ▶ \$11.0 billion on supplies and over the counter medicines;
- ▶ \$3.5 billion on services, such as grooming and boarding; and
- ▶ \$2.2 billion on live animal purchases.

Dog owners have a heavier financial burden to bear than cat owners, spending nearly twice as much each year on surgical vet visits, treats, and vitamins, as well as three times as much on grooming. Dog owners take their pet to the vet an average of 2.8 times a year, up 8% from 2006. Cat owners take their pet to the vet an average of 2.1 times a year, unchanged over the same period. Pet owners are willing to sacrifice for

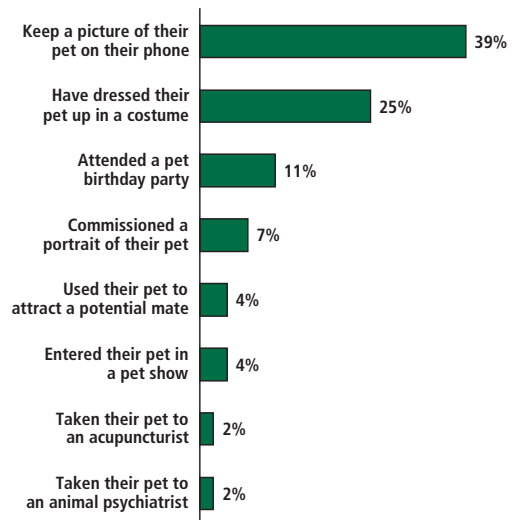


SOURCE: American Pet Products Association



SOURCE: American Pet Products Association

### HOW PET OWNERS HAVE HUMANIZED THEIR PETS, 2010



SOURCE: Boston Magazine

their pet's health, with 13% of cat owners and 15% of dog owners choosing to tend to their pet's health before their own.

Seven in 10 Americans (70%) say the recession has not impacted their decision to keep a pet, and 80% of pet owners say it has not affected the amount they spend on their pets. Even 62% of horse owners, which have the highest cost to bear, say the recession has not affected their spending on their pet.

Spending on pet food and treats grew 5.7% in the year ending January 23, 2010, according to Nielsen Company. While dry food accounts for the lion's share of cat food spending, spending on moist food grew 56% over the year. Sales of wet cat food were flat. Dry food also accounts for the largest share of dog food spending, and posted the largest growth, up 11% over the year.

**PET FOOD SPENDING, YEAR ENDING JANUARY 23, 2010**  
(In thousands)

	DOLLAR SALES	CHANGE VS. PRIOR YEAR
<b>CAT FOOD</b>		
Dry	\$2,174,897	6.3%
Wet	\$1,572,211	0.5%
Moist	\$94	56.0%
<b>DOG FOOD</b>		
Dry	\$4,355,999	10.6%
Wet	\$1,282,678	2.7%
Moist	\$89,567	4.5%
<b>DOG AND CAT TREATS</b>		
All	\$1,650,467	8.5%

SOURCE: Nielsen Company

Pet owners most commonly found their animals at a shelter or rescue group (41%), followed by a breeder (35%), according to *Boston Magazine*. Fewer than one in 10 obtained pets from a family member or friend (9%), pet store (5%), as a stray (3%), or from a website (3%). The primary reason for choosing a particular pet was its disposition (55%), followed by its size (11%), pedigree (9%), young age (6%), and attractiveness (4%).

Nearly three in 10 pet owners agree that their pet understands what they feel (29%) and what they say (29%). The same proportion (29%) wouldn't date a person that could not get along with their pet.

SOURCES: "2009-2010 National Pet Owners Survey," American Pet Products Association, Bob Vetere, President, 255 Glenville Rd., Greenwich, CT 06831; 203-532-3603; bob@americanpetproducts.org; www.americanpetproducts.org. Price: \$795 for members or students; \$1,695 for non-members.

"Pet Survey," *Boston Magazine*, March 4, 2010, Jennifer Johnson, Managing Editor, 300 Massachusetts Ave., Boston, MA 02115; 617-262-9700; jjohnson@bostonmagazine.com; www.bostonmagazine.com.

"Nielsen Homescan," Nielsen Company, Todd Hale, SVP Consumer & Shopping Insights, 770 Broadway, New York, NY 10003-9595; 646-654-5000; www.nielsen.com. Price: Call for information.

## Americans Fall Head Over Heels For Pets

Cats and dogs cause some 86,000 annual falling injuries to humans that require visits to the emergency room, according to estimates from the Centers for Disease Control and Prevention for 2001-2006, the most recent data available. Dogs cause more than seven times as many injuries as cats,

most likely because they are larger and more likely to accompany owners outdoors.

The most frequent type of injury involved people tripping or falling over their dog (31% of injuries). The vast majority of injuries involving cats (86%) occurred at home, with the most common being when owners chased their cat (12% of injuries).

**SITUATION DURING WHICH FALLING ACCIDENTS OCCURRED, INVOLVING DOGS VS. CATS, 2001-2006 (ANNUAL ESTIMATES)**

	DOGS	CATS
Walking pet	19,854	40
Caring for pet	3,929	923
Chasing pet	3,779	1,182
Playing with pet	3,372	232
Running from pet	2,399	43
Running with pet	995	0
Stepping over pet	414	245
Attacked by pet	268	20
Other	5,671	1,140
Unknown	35,112	6,287

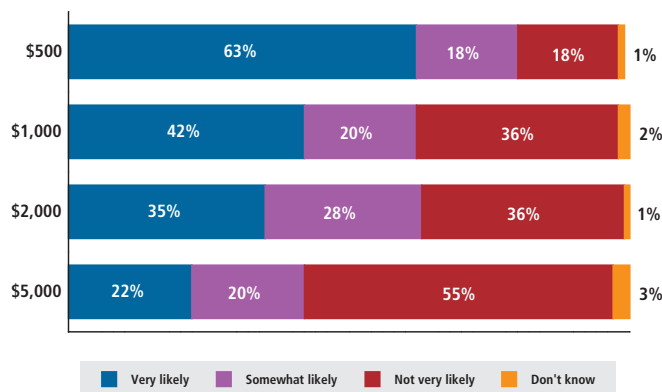
SOURCE: Centers For Disease Control And Prevention

SOURCE: "Nonfatal Injuries From Falls Associated With Dogs And Cats, 2001-2006," Centers For Disease Control And Prevention, National Center for Health Statistics, 3311 Toledo Rd., #2217, Hyattsville, MD 20782; 301-458-4901; nhis@cdc.gov; www.cdc.gov/nchs.

## Money Matters For Pets' Medical Procedures

Although 27% of pet owners think that medical insurance for pets is a good way to save on vet bills, only 5% have medical insurance for their animals, according to Petside.com. Nearly six in 10 pet owners (59%) are not worried about being able to cover the cost of their pet's medical treatment. However, cost is a factor — as the price of the procedure goes up, those willing to go through with it and pay for it goes down.

**PET OWNERS' DECISION TO GO FORWARD WITH A MEDICAL PROCEDURE FOR THEIR PET, BY COST, 2010**



SOURCE: Petside.com

**SOURCE:** "Pet Medical Insurance," Petside.com (Procter & Gamble), Staci Dudley, Public Relations, One P&G Plaza, Cincinnati, OH 45202; 513-983-1000; dudley.si@pg.com; www.pg.com.

**FAST FACT:**

**Pets And Renters**

- ▶ 80% of renters say a pet-friendly policy played a role in deciding where to live, and 30% chose a space close to amenities such as dog parks, walking trails, and veterinary services.

**SOURCE:** Apartments.com; phone: 312-601-5305.

## factoids

- ▶ Six in 10 adults (60%) like both **dogs and cats**, compared to only 2% who like neither animal. (*Petside.com/Procter & Gamble; phone: 513-983-1000*)
- ▶ One in six **dog owners** (17%) have an electronic tracking device implanted in their dog. (*American Pet Products Association; phone: 800-532-1225*)
- ▶ The vast majority of Americans (82%) say it is likely they will get their **next pet** from a shelter or rescue organization, compared to 42% who say they would likely get it from a breeder, and 11% a pet store. (*Petside.com; phone: 513-983-1000*)
- ▶ Nearly half of people with **multiple cats** in their household (48%) say they have visitors to their home a few times a week, and half clean their homes several times a week to keep it tidy for guests. (*Nestle Purina PetCare; phone: 617-939-8316*)
- ▶ The vast majority of those who take their pets with them on **vacation** (85%) say their pets influence how far they are willing to travel. (*PetRelocation.com; phone: 512-264-9800, x124*)

# philanthropy

The older Americans are, the greater average amount they donate to charity. They give the most money to religious and educational institutions. More than half of Americans make donations at the checkout counter, followed by sending money by mail, giving money at a gift shop, and donating online.

Americans support corporations that get involved in causes and use that as a part of their marketing campaign, but they find companies that partner with a non-profit organization to be more credible. Their skepticism of corporations makes them more likely to donate to a non-profit and more likely to participate in an event organized by a non-profit.

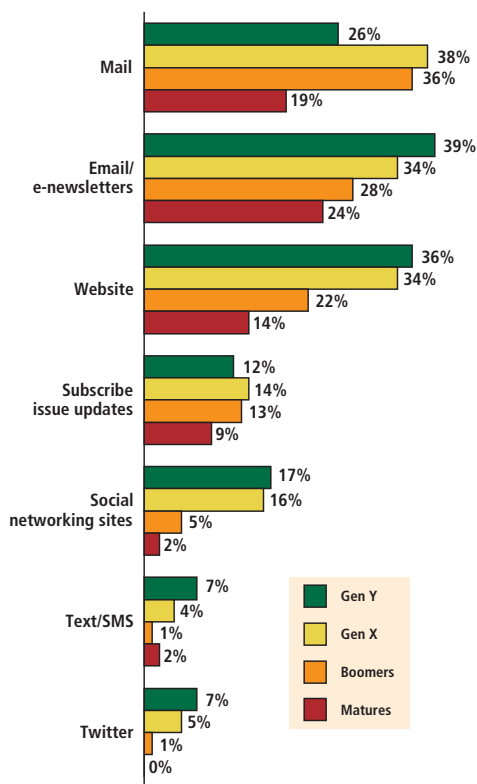
## Americans Give Back: How They Connect And Donate To Charity

Americans give an estimated \$118.2 billion to charity annually, according to Convio. The organization arrives at that number by tallying generational giving:

- ▶ 79% of Matures donate an average of \$1,066 per year;
- ▶ 67% of Boomers donate an average of \$901;
- ▶ 58% of Gen Xers donate an average of \$796; and
- ▶ 56% of Gen Yers donate an average of \$341.

The checkout line is where most Americans make donations (52%). Nearly half (49%) donate by mail. About a third donate in a gift shop (32%) or online (31%), and 27% at a fundraising event. Some 26% give an honor/tribute gift, and 20% donate through a third-party vendor. Only 14% donate via phone or monthly debit to an account.

HOW CONSUMERS AND CHARITIES CONNECT, 2010



SOURCE: Convio

SOURCE: "The Next Generation Of American Giving," Convio, Vinay Bhagat, Founder and Chief Strategy Officer, 11501 Domain Dr., #200, Austin, TX 78758; 512-652-2600; vbhagat@convio.com; www.convio.com. Price: Available online at no charge.

## American Charitable Giving Fell In 2009

Corporate, foundation, and individual donations to charities fell to \$303.7 billion in 2009, down 3.6% compared to

2008, according to Giving USA. Individual giving did not fall as sharply, down just 0.4% to \$227.4 billion over the same period.

CHARITABLE DONATIONS BY CATEGORY, 2009

TYPE OF CHARITY	SHARE OF TOTAL GIVING	DOLLARS DONATED (IN BILLIONS)	CHANGE 2009 VS. 2008
Religion	33%	\$101	-0.7%
Education	13%	\$40	-3.6%
Foundations	10%	\$31	-8.0%
Human services	9%	\$27	2.3%
Health	7%	\$22	3.8%
Public/society benefit	8%	\$23	-4.6%
Arts, culture, humanities	4%	\$12	-2.4%
International aid	3%	\$9	6.2%
Environmental or animal-related	2%	\$6	2.3%
Individuals	1%	\$4	flat

NOTE: Giving to individuals includes grants from foundations to benefit named persons, most often gifts of medication to patients in need.

SOURCE: Giving USA

SOURCE: "Charitable Contributions 2009," Giving USA, Edith Falk, Chair, 4700 W. Lake Ave., Glenview, IL 60025; 847-375-4709; info@givinginstitute.org; www.givinginstitute.org.

## Cause Marketing: Partnerships With Non-Profits Lend Credibility

Most Americans (78%) say that a corporate charitable cause that partners with a non-profit stands out more than a corporate program alone, according to Cone. Associating the cause with a special event or time (81%) or with a celebrity or notable spokesperson (61%) also helps.

Half (50%) are more likely to donate to a non-profit than to a corporation; 49% are more likely to participate in an event for a non-profit, and 41% are more likely to volunteer for a non-profit.

They are not giving blindly, however. More than six in 10 (61%) actively seek details about the partnership between a corporation and non-profit before donating or advocating for it, and 45% think that such partnerships do not provide enough information.

BEST WAYS FOR NON-PROFIT CAUSES TO REACH POTENTIAL DONORS, 2010

Word of mouth from family and friends	.81%
Traditional media (newspapers, magazines, TV)	.80%
Advertising	.74%
At events	.69%
In a store, on a package at the register	.66%
Standard mail	.64%
Email	.59%
Social media channels	.49%
Via mobile devices	.29%

SOURCE: Cone



Three quarters (75%) want to hear details about the actions of the partnership, including the effects and money raised for the cause.

**SOURCE:** "Non-profit Marketing Trend Tracker," Cone, Carol Cone, 855 Boylston St., Boston, MA 02116; 617-227-2111; cccone@coneinc.com; www.coneinc.com. Price: Call for information.

## factoids

- ▶ When corporations partner with a non-profit to **support a cause**, 59% of consumers are more likely to buy a product associated with the partnership than the corporation alone. (*Cone; phone: 617-939-8380*)
- ▶ Two thirds of Americans (66%) believe that the U.S. has an obligation to **help poor children** around the world, and they most commonly agree it should be the top charitable priority of the government, tied with assisting underserved families in the U.S. (31% each). (*ChildFund; phone: 804-756-8987*)
- ▶ Perhaps due to the ease of donating to causes such as relief efforts in Chile and Haiti via text message, teens (46%) are more likely than their parents (26%) to **donate to charity**, a reversal of 2009, when parents (39%) were more likely than teens (26%) to donate. (*World Vision; phone: 708-366-8389*)

### FAST FACT:

#### Charitable Giving

Emerging majorities were more likely to donate to relief efforts in Haiti following the earthquake in January 2010, finds Russ Ried, a nonprofit assistance organization.

- ▶ 59% of Asians donated, as did
- ▶ 53% of Latinos, and
- ▶ 51% of Blacks, compared to
- ▶ 38% of Americans overall.

**SOURCE:** "Heart of the Donor: Insights into Donor Motivation and Behavior for the 21st Century," Russ Ried, Tom Harrison, President and CEO, 2 N. Lake Ave., #1100, Pasadena, CA 91101; 626-449-6100; tharrison@russreid.com; www.russreid.com. Price: Available upon request at no charge.

# retail

Shoppers are creatures of habit and prefer to buy the same products and brands repeatedly, though the recession forced some to change their routines. Private label brands are a key strategy for consumers trying to save money on groceries and apparel. Lower income households are more likely than average to be interested in such products, but a majority of all consumers are buying more private label brands than they did a year ago.

Most consumers think private label brands are as good as national brands. Although they buy private label items, some shoppers are beginning to think there are too many private label brands in stores and that retailers are squeezing out the national brands they like.

Another common recessionary savings strategy is clipping coupons. About half of consumers actively seek out coupons, while the other half happens to simply run across them. Consumers also plan their shopping trips using lists which include details such as the brand they prefer, product size and price.

Consumers are also shopping online more as they try to extend their budgets. They are more likely than in the past to go online to compare prices, research products, and find and print coupons. Women are more cautious online shoppers, worrying more about transaction security and considering shipping costs, whereas men focus more on product availability.

Shoppers with a "saver" attitude are less adventurous in stores than are those with a "spender" attitude. The former concentrate on sticking to their shopping lists and using coupons for as many purchases as possible, whereas the latter like to explore the store, think shopping is fun, and consider shopping a way to relax.

## Grocery Shoppers Prefer Private Label Pricing But Stick With National Brands For Variety And Reliability

Consumers have made a variety of changes in their shopping habits, but perhaps none has changed the retail landscape as much as their tendency to switch to less-expensive private label brands in lieu of national brands.

Nearly half of grocery shoppers (43%) bought more private label products in 2009 than they had in previous years, but more significantly, 86% do not intend to switch back to national brands when the recession ends, according to Hartman Group. In addition, 47% switched from a favorite national brand to a store brand. Of those, 42% are unlikely to switch back, 34% are on the fence, and 24% expect to switch back to their national brand when the economy improves.

Hartman's Michelle Berry feels the switch has the potential to become permanent because "quality keeps them" as customers after the lure of lower prices has brought them into the fold. However, she adds that many retailers have rapidly expanded their private label offerings recently, which, without close attention to the development of each new product, may cost them the perception of quality they have established.

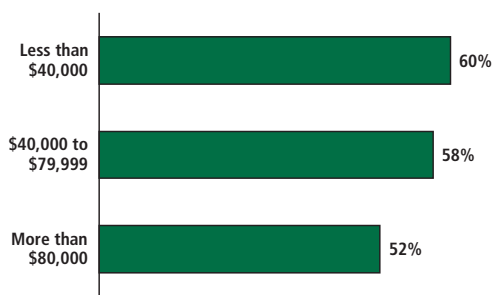
Overall, 36% of shoppers say they remain loyal to national brands, down from 40% only one year prior, according to BrandSpark and *Better Homes & Gardens*. BrandSpark's Robert Levy says "Brands will have to make sure shoppers know why their products are worth a premium."

### Income Is A Factor

Households with annual incomes below \$80,000 are more likely than those with higher incomes to have increased their purchases of private label products during the recession. Those households — 46% with annual incomes of less than \$40,000 and 44% with incomes of \$40,000 to \$79,999 — are more likely than those with incomes of \$80,000 or more (35%) to plan to continue to buy the same amount of private label products or more after the economy improves.

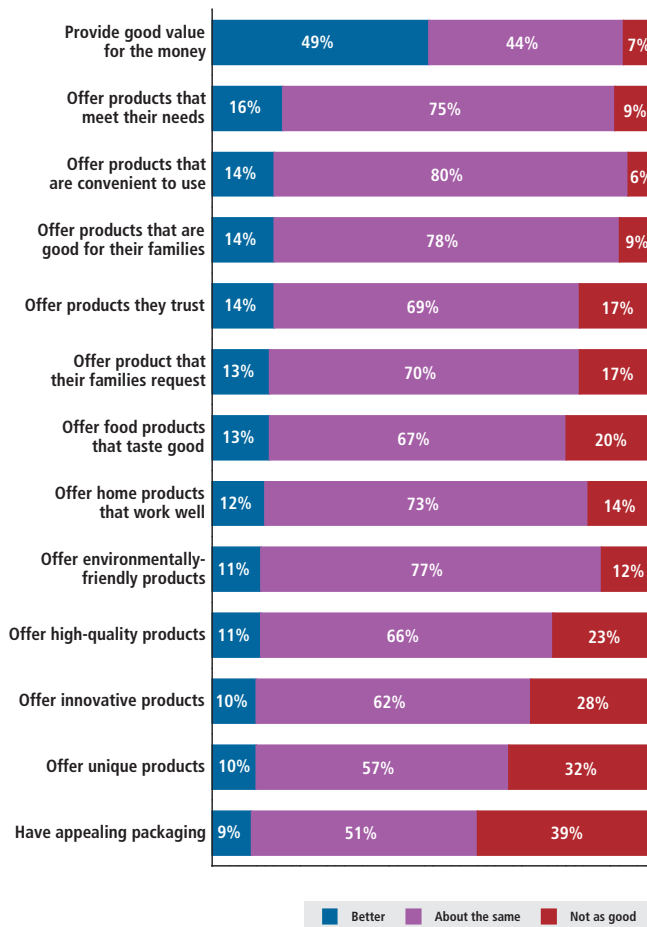
Their attitudes toward private label products also vary by income. Higher income shoppers are more likely than average to say they are loyal to brand name products and to

### SHOPPERS WHO ARE BUYING MORE PRIVATE LABEL PRODUCTS THAN THEY DID THE PRIOR YEAR, BY ANNUAL HOUSEHOLD INCOME, 2009



SOURCE: BrandSpark and *Better Homes & Gardens*

### GROCERY SHOPPERS' ATTITUDES TOWARD PRIVATE LABEL AND NATIONAL BRANDS, BY ANNUAL HOUSEHOLD INCOME, 2009



SOURCE: BrandSpark and *Better Homes & Gardens*

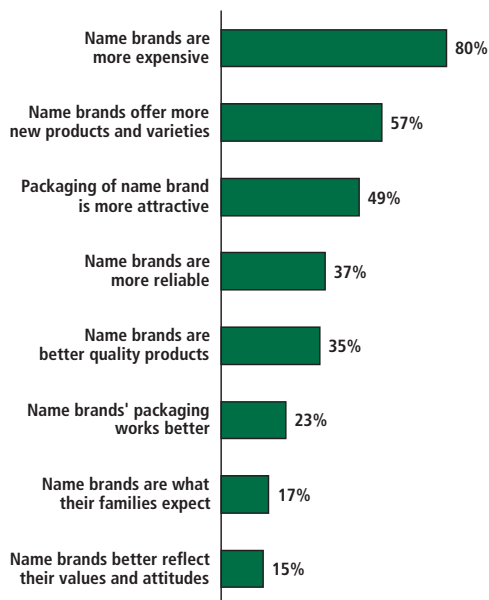
believe product innovations are more likely to come from national brands than from store brands (see chart, p. 5). Only a slight majority (53%) believe private label products are on par with the quality of national brands, and they are least likely to think private labels are a good value for the money.

The lowest income bracket is the least likely to say they buy the same brand names on a regular basis (63%); they are more focused on finding the cheapest price than checking brand names.

For all the positive opinions shoppers have toward private labels, only 18% go right for store brands, according to M/A/R/C Research. In fact, they are more likely to go right for the national brands and ignore store brands (22%). However, most (64%) first look for their usual brand then check store-brand alternatives, and 78% regularly compare prices between store brands and national brands.

There are reasons that shoppers avoid buying private label products. Nine in 10 (90%) have stuck with the nation-

### GROCERY SHOPPERS' ATTITUDES TOWARD NATIONAL BRANDS, 2009



SOURCE: M/A/R/C Research

al brand because it is simply a brand they trust, and 91% have done so because they could get the national brand on sale. The vast majority (84%) have bought a national brand because it offers varieties that are not available in the private label version. The most favorable opinion they have of national brands is that they offer more new products and varieties (57%).

During the rise of private label goods, packaging was often a concern, but it was rarely a factor in 2009, with only 31% of shoppers saying they chose a national brand over a private label brand because it offered better packaging.

**SOURCES:** "American Shopper Study," BrandSpark, Robert Levy, President, 1075 Bay St., #1002, Toronto, Ontario, Canada M5S 2B1; 647-727-4576; rlevy@brandspark.ca; www.brandspark.ca. Price: Call for information.

*Better Homes & Gardens*, James Carr, VP/Group Publishers, 125 Park Ave., New York, NY 10017; 212-551-7110; james.carr@meredith.com; www.bhg.com. Also Maxwell Bonnie; 347-429-1403; mbonnie@bestnewproductawards.com.

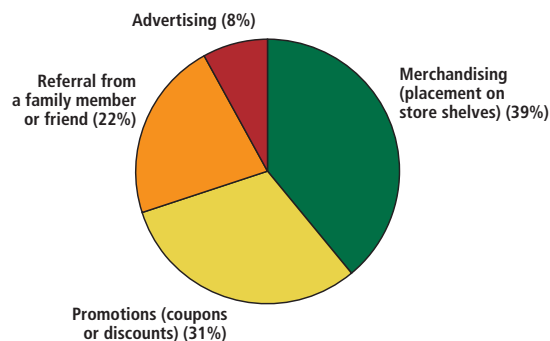
"Private Label 2010," The Hartman Group, Laurie Demeritt, President, 1621 114th Ave. SE, #105, Bellevue, WA 98004; 425-452-0818, x106; laurie@hartman-group.com; www.hartman-group.com. Price: Call for information.

"In Focus: Name Brands," *The Checkout*, January 2010, M/A/R/C Research, Merrill Dubrow, President, 1660 N. Westridge Cir., Irving, TX 75038; 972-983-0416; merrill.dubrow@marcresearch.com; www.marcresearch.com. Price: Call for information.

## In Sight To In Their Shopping Cart: The Path Of New Product Trials

Most grocery shoppers tried a new product in the prior 30 days, finds Market Force Information.

### WHAT INFLUENCES GROCERY SHOPPERS TO TRY NEW PRODUCTS, 2010



SOURCE: Market Force Information

Most commonly, they picked up a new product because they saw it on a shelf and decided to give it a try (39%). Nearly a third (31%) tried a new product because they had a coupon or it was on sale, and 22% tried it because a family member or friend recommended it to them. Only 8% tried a new item because they saw it advertised. That varies from category to category, with shoppers more responsive to promotions for cereals, more responsive to seeing the item on the shelf for snack purchases, and more responsive to advertising for cleaning products.

Some 52% of shoppers tried a new product in the coffee and tea category. More than eight in 10 shoppers (82%) drink coffee or tea at home and were prompted to try new brands because of new flavors and specialty blends. They most commonly tried:

1. Starbucks coffee
2. Dunkin' Donuts coffee
3. Celestial Seasonings tea

Nearly half of shoppers (44%) tried a new product in the snack category. Only 17% say they typically have snack mixes at home, and while they knew they had tried one in the prior month, they could remember the brand but not the flavor. They most commonly tried:

1. Chex Mix
2. Ritz
3. Fiber One

Nearly three in 10 (29%) tried a new product in the household cleaning category. When they did try a new product, it was usually from a long-standing brand. They most commonly tried:

1. Lysol
2. Swiffer
3. Clorox

**SOURCE:** "New Brand Trial Survey," Market Force Information, Janet Eden-Harris, CMO, 248 Centennial Pkwy., #150, Louisville, CO 80027; 303-402-6920; sales@marketforce.com; www.marketforce.com. Price: Call for information.

## Where Loyalty Lies: Walmart Gains On Regional Chains In Multiple Regions

Consumers' loyalty can be won with a value-oriented pricing strategy, according to Colloquy. Walmart, which is already the most frequently shopped retailer in all regions, is making inroads with consumers in the Northeast, Northwest, and Southwest as it ousts former loyalty leaders.

Curiously, Walmart is not the loyalty leader in any region in the mass merchant category; instead, it is more likely to lead in the grocery and personal care categories.

Colloquy attributes the shift in loyalty patterns to changes in what consumers say defines a loyal shopper — they place less weight on how long a consumer has shopped a particular retailer, and more on how familiar a consumer is with the store, how well they know its locations, and if they shop its sales. It points to a more price-conscious consumer, the result of the recession.

### SHOPPERS PREFERRED RETAILERS, BY CATEGORY, BY REGION, 2010

CATEGORY	MOST OFTEN SHOPPED	LOYALTY LEADER (SCORE, ON 10-PT SCALE)	2008 LOYALTY LEADER
<b>NORTHEAST</b>			
Grocery	Walmart	Walmart (9.1)	Safeway
Personal care	Walmart	Walmart (8.8)	Costco
Department store	Walmart	Walmart (8.3)	Costco
Mass Merchant	Walmart	BJ's Wholesale Club (8.5)	Sam's Club
<b>SOUTHEAST</b>			
Grocery	Walmart	Publix (9.0)	Safeway
Personal care	Walmart	Walgreens/Walmart (8.5, tie)	Costco
Department store	Walmart	Target (8.5)	Costco
Mass Merchant	Walmart	Costco (8.7)	Sam's Club
<b>MIDWEST</b>			
Grocery	Walmart	Kroger (8.8)	Safeway
Personal care	Walmart	Walgreens (8.7)	Costco
Department store	Walmart	Walmart (8.5)	Costco
Mass Merchant	Walmart	Meijer (8.6)	Sam's Club
<b>SOUTHWEST</b>			
Grocery	Walmart	H-E-B (9.1)	Safeway
Personal care	Walmart	Walmart (8.6)	Costco
Department store	Walmart	Macy's/Walmart (8.6, tie)	Costco
Mass Merchant	Walmart	Costco (8.8)	Sam's Club
<b>NORTHWEST</b>			
Grocery	Walmart	Walmart (8.5)	Safeway
Personal care	Walmart	Walmart (8.5)	Costco
Department store	Walmart	Costco (9.1)	Costco
Mass Merchant	Safeway	Cosco (9.3)	Sam's Club

SOURCE: Colloquy

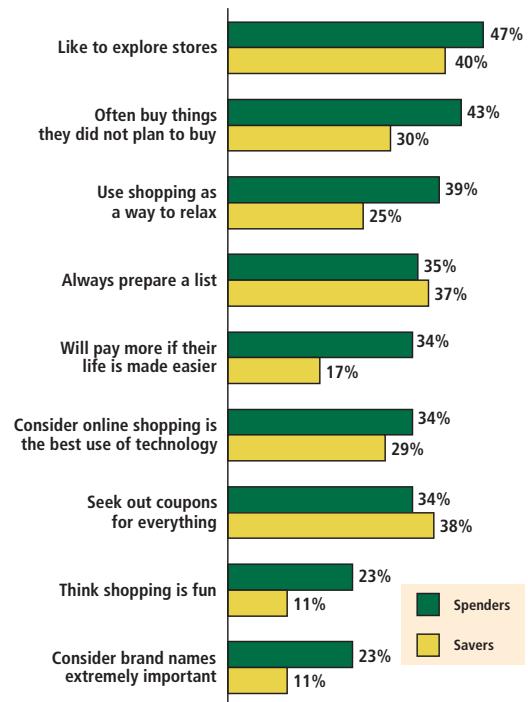
SOURCE: "What Price Loyalty: The 2010 Colloquy Retail Loyalty Index," Colloquy, Josh Milner, 4445 Lake Forest Dr., #200, Cincinnati, OH 45242; 513-248-5918; josh.milner@colloquy.com; www.colloquy.com.

## Shoppers Seek Value From Stores, Brands

Shoppers are looking for value in the recession, and they most commonly cite Walmart (14%) as a store that provides value, according to M/A/R/C Research. Among food products, Kraft (6%), Kellogg's (5%), and Campbell's are the brands that consumers most often associate with value.

The recession has also affected shoppers' behavior. Those who are "spenders" (defined as those who are shopping more in the past few months) are more likely than "savers" (defined as those who are shopping less) to enjoy exploring stores, to use shopping as a way to relax, and to say brands are very important to them. Savers are more likely than spenders to focus on coupons and to prepare shopping lists.

### AMERICANS' ATTITUDES TOWARD SHOPPING, SPENDERS VS. SAVERS, 2009



SOURCE: M/A/R/C Research

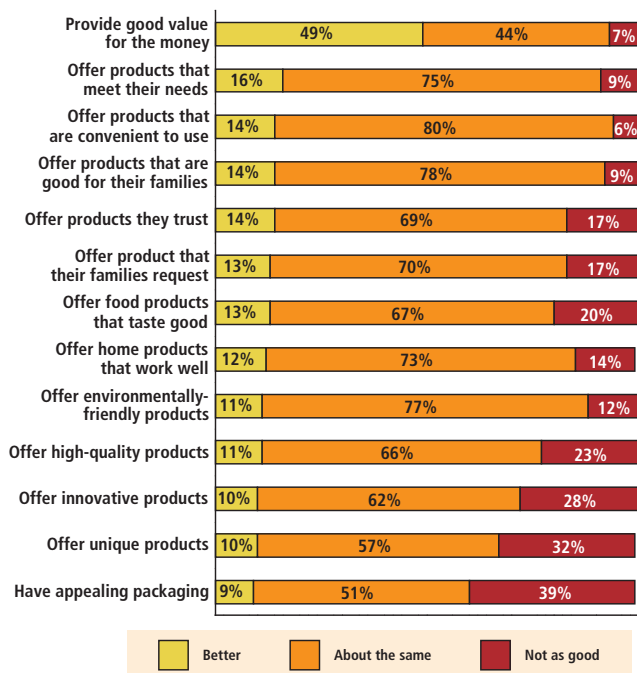
SOURCE: "Spenders Are Having Fun Again In The Store And Online," The Checkout, January 2010, M/A/R/C Research, Merrill Dubrow, President, 1660 N. Westridge Cir., Irving, TX 75038; 972-983-0416; merrill.dubrow@marcresearch.com; www.marcresearch.com. Price: Call for information.

## Private Label Products Are As Good As National Brands, Say Shoppers

The vast majority of consumers — both globally and in the U.S. — believe that private label products are as good as or better than their national brand counterparts, says Ipsos.

While acknowledging private labels as providing good

### AMERICANS' ATTITUDES TOWARD PRIVATE LABEL VS. NATIONAL BRAND PRODUCTS, 2010



NOTE: Totals may not equal 100% due to rounding.

SOURCE: Ipsos

bang for the buck and being in tune with their needs, American shoppers also say those labels could profit from being more unique and innovative merchandisers and by offering more striking packaging.

**SOURCE:** "Majority Of Consumers Equate Store Brands With National Brands On Essential Attributes," Ipsos, Allyson Leavy, Director of Marketing Consumer Goods, 1600 Stewart Ave., #500, Westbury, NY 11590; 516-507-3515; allyson.leavy@ipsos.com; www.ipsos.com. Price: Available upon request at no charge.

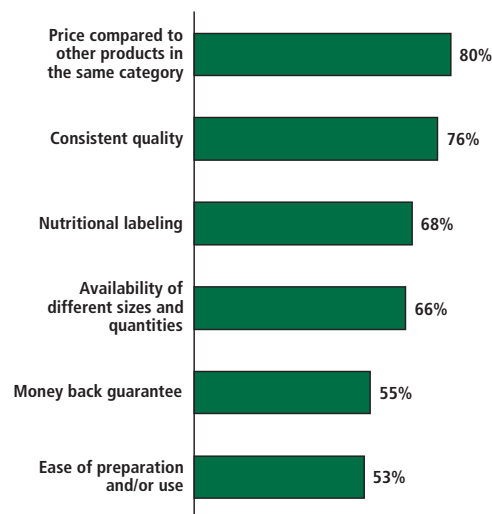
## Awareness, Purchase Of Store Brands Continues To Grow

A majority of shoppers (57%) buy store brands frequently, according to the Private Label Manufacturers Association. Only 2% never buy store brands. About half of shoppers (51%) are more aware of store brands than they were a year ago, including 72% of those aged 18-24 and 55% of those aged 65 and older.

More than four in 10 (43%) have chosen a store brand after previously buying only national brands on their prior few shopping trips, up from 36% in June 2009. Three quarters (75%) say the recession has influenced their decision to buy store brands, with 62% citing the recession as their reason for continuing to purchase store brands in the future.

In addition, the vast majority trying store brands for the

### FACTORS THAT AFFECT SHOPPERS' DECISIONS TO PURCHASE PRIVATE LABEL PRODUCTS OVER NATIONAL BRANDS, 2010



SOURCE: Private Label Manufacturers Association

first time (94%) think they compare favorably to national brands.

In order to save money, consumers intend to change their shopping habits in other ways, such as:

- ▶ Buying larger sizes or quantities of items they buy on a regular basis in order to get a discount (69%);
- ▶ Looking for more coupons and promotions on national brands (67%);
- ▶ Changing the store or type of store where they do their primary grocery shopping (62%); and
- ▶ Spending less money overall on groceries (51%).

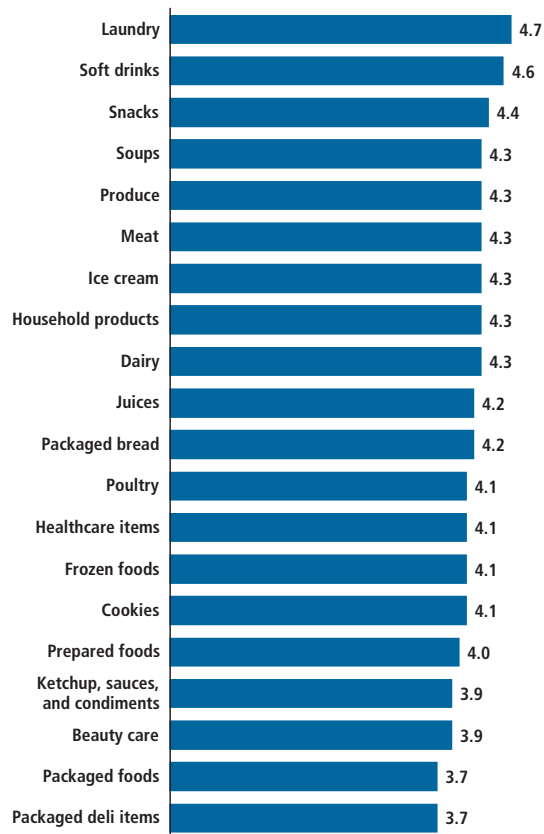
**SOURCE:** "Recession, Recovery & Store Brands," Private Label Manufacturers Association, Tom Prendergast, Director of Research Services, 630 3rd Ave., 4th Fl., New York, NY 10017; 212-972-3131; info@plma.com; www.plma.org. Price: Call for information.

## Are Store Brands Squeezing Consumer Options At Grocery?

As stores and consumers have embraced private label brands, some customers are dissatisfied with the balance of private label and national brand options, according to The Consumer Network. Of 20 stores surveyed, consumers were most satisfied with the mix at Shoprite (4.9, on a scale of one to five where five is the ideal balance), Trader Joe's (4.5), HEB (4.5), and Stop & Shop (4.5). They were least satisfied with dollar stores (3.4), Sam's Club (3.3), and Whole Foods (3.2).

Their satisfaction also varies by product category — they are happy with their options in the laundry aisle, but think stores could do better in the beauty and deli categories.

### CONSUMER SATISFACTION WITH PRIVATE LABEL VS. NATIONAL BRAND SELECTION, BY CATEGORY, 2010



NOTE: Based on a scale of 1 to 5, where five is an ideal mix of private label to national brands.

SOURCE: The Consumer Network

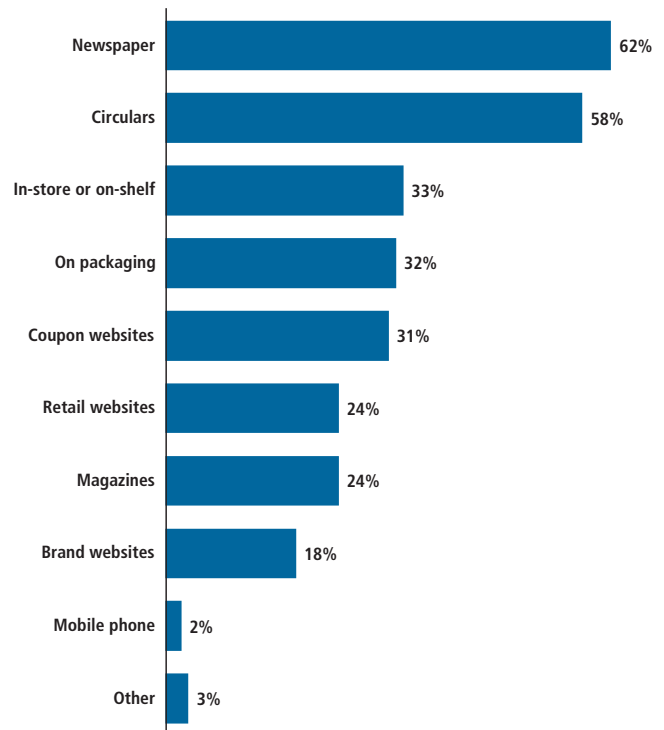
SOURCE: "Too Many Store Brands?" The Consumer Network, *The Shopper Report* June 2010, Mona Doyle, PO Box 42753, Philadelphia, PA 19101; 215-235-2400; shopperreport@cs.com. Price: \$99 for a one-year subscription.

## Shoppers Use Coupons Because They Are A Convenient Way To Save

The vast majority of shoppers (88%) use coupons, according to M/A/R/C Research. Six in 10 shoppers (60%) look for coupons before going to stores. Most of those who use coupons (74%) consider them convenient and useful, while 26% think they take too much time to find and use. Shoppers aged 50 and older (32%) are more likely than average to believe coupons take too much time to find and use.

Those who use coupons are nearly equally likely to say they most often actively search for coupons (51%) as to simply use them when they run across them (49%). They are slightly more likely to say they most often first choose the brand they wish to buy and then look for a coupon for it (52%) than to first find a coupon and select the brand they will buy based on it (47%).

### WHERE SHOPPERS LOOK FOR COUPONS, 2010



SOURCE: M/A/R/C Research

Shoppers are three times as likely to use coupons to save money and spend less (75%) than to be able to afford more items (25%). Seven in 10 (70%) use them to buy familiar brands, and 67% to buy familiar products. More than six in 10 (61%) use coupons most often in-store, compared to 39% who use them most often online.

SOURCE: "Coupons: How Savvy Shoppers Are Finding Value And Making Decisions," *The Checkout*, M/A/R/C Research, Merrill Dubrow, President, 1660 N. Westridge Cir., Irving, TX 75038; 972-983-0416; merrill.dubrow@marcresearch.com; www.marcresearch.com. Price: Call for information.

## Customer Service Is Key In Current Economy

More than six in 10 Americans (61%) say that customer service is more important to them during the recession than it was in the past, according to American Express. They reward the companies that give them excellent service by spending an average of 9% more with them.

Only 37% believe that companies have taken notice and improved their customer service. More than a quarter (28%) think companies are paying less attention to the service they provide. Nearly half of consumers (48%) say companies are helpful but do not go the extra mile to keep their business, and 21% think companies take their business for granted.

The most influential factors in consumers' choices of which companies to do business with include personal expe-



rience (98%), the company's reputation or brand (92%), and recommendations from friends and family (88%).

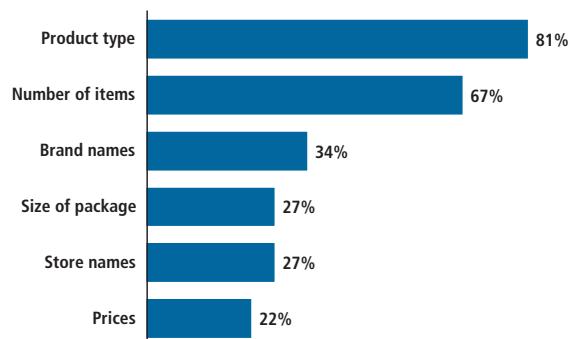
**SOURCE:** "Global Customer Service Barometer," American Express, Keri Buster, 200 Vesey St., New York, NY 10285; 212-640-6193; kerik.buster@aexp.com; www.aexp.com.

## Taking A Peek At Shoppers' Lists

More than four in 10 shoppers (43%) always rely on a shopping list, says M/A/R/C Research. Married shoppers (52%), women (46%), and Whites (46%) are more likely than average to shop with a list, while Hispanics (37%), singles (35%) and Millennials (32%) are less likely than average to do so.

Nearly three quarters of shoppers (74%) are influenced by the brands they currently use when formulating their lists. A third (34%) make lists based on recipes, and 31% based on recommendations from family or friends.

INFORMATION SHOPPERS INCLUDE ON THEIR GROCERY LISTS, 2010



**SOURCE:** M/A/R/C Research

**SOURCE:** "Shopping Lists," The Checkout, Issue 4.10, M/A/R/C Research, Merrill Dubrow, President, 1660 N. Westridge Cir., Irving, TX 75038; 972-983-0416; merrill.dubrow@marcresearch.com; www.marcresearch.com. Price: Call for information.

## Consumers Are Spending More Time Online, Shopping More Online

Nearly half of online Americans (44%) are spending more time online in 2010 as a result of the recession, up from 25% in 2009, according to PriceGrabber. Among the reasons they cite for their increased time online are:

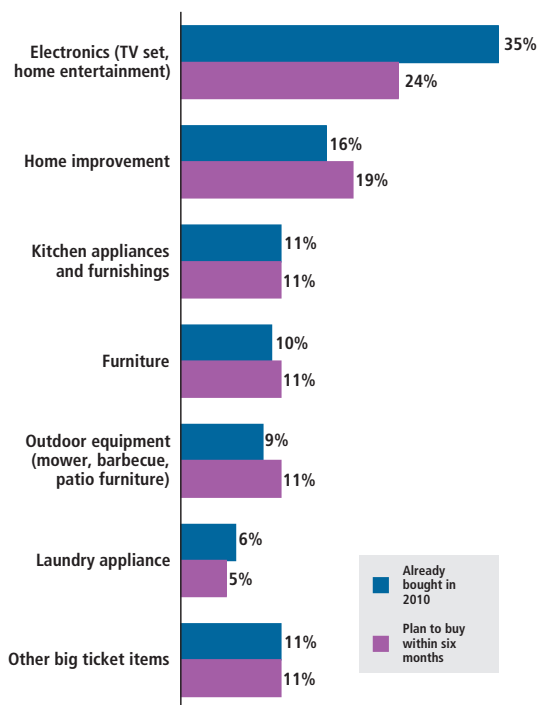
- ▶ Price comparison shopping (59%, up from 40%);
- ▶ Shopping for or researching products (55%, up from 26%);
- ▶ Finding and printing coupons (36%, up from 26%).

Nine in 10 online shoppers (90%) say comparing prices online reassures them that they are getting the best deal, and 79% look to make online purchase from retailers who do not have sales tax and offer free shipping. A majority (57%)

search for online coupons even if they intend to shop offline. Nearly four in 10 (39%) say online shopping helps them avoid impulse purchase.

Although a two thirds of online shoppers (65%) are spending less during the recession than they have previously, most (56%) have purchased a big ticket item in 2010. Many more plan to make a big ticket purchase within six months. They may be paying for such items differently — 39% are only charging items they know they can pay off at the end of the month, and 19% have stopped using their credit cards altogether.

ONLINE SHOPPERS WHO HAVE BOUGHT AND PLAN TO BUY BIG TICKET ITEMS, BY CATEGORY, 2010



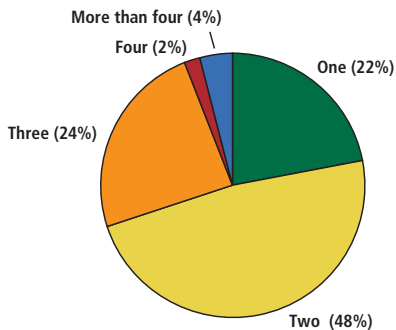
**SOURCE:** PriceGrabber

**SOURCE:** "U.S. Shopping Behavior In This Economic Climate," Sara Rodriguez, Market Research Analyst, 5150 Goldleaf Circle, 2nd Fl., Los Angeles, CA 90056; 323-601-1282; sara@pricegrabber.com; www.pricegrabber.com. Price: Available upon request at no charge.

## Consumers Shop Online But Buy In Store

More than three quarters of Americans (78%) use multiple channels — such as computer, mobile device, catalog, in-store — to research and make purchases, according to ATG research cited by eMarketer. Three in 10 (30%) of respondents use three or more channels during the purchase process. Internet users (61%) browse and research products online at least once weekly, while only 37% browse in-store on a weekly basis. However, they remain more likely to buy in store (65%) than online (14%).

NUMBER OF RETAIL CHANNELS CONSUMERS USE DURING A PURCHASE DECISION, 2010



SOURCE: eMarketer citing ATG

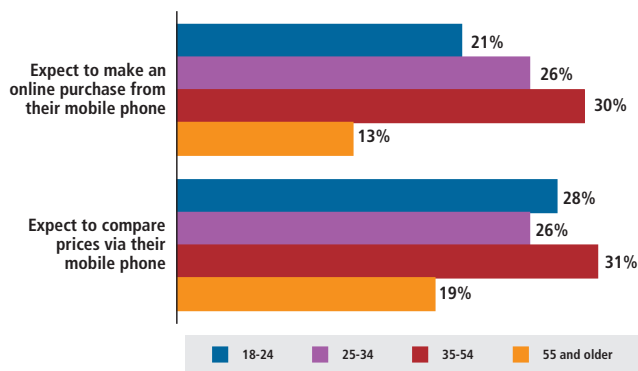
SOURCE: "US Retail E-Commerce Forecast: Room to Grow," eMarketer, Jeffrey Grau, Sr. Analyst, 75 Broad St., 32nd Fl., New York, NY 10004; 212-763-6010; jgrau@emarketer.com; www.emarketer.com. Price: \$695.

## Smartphones Enable Owners To Shop Online

Two thirds of adults aged 25-34 (66%) own a Web-enabled phone, as do 61% of 35-54 year olds, 50% of 18-24 year olds, and 38% of those aged 65 and older, according to PriceGrabber. Of those who have not used their mobile devices to shop, more than a quarter will do so in the coming year.

One in eight Americans (12%) are already using their Web-enabled phones to make purchases. Nearly one in five (20%) use their devices to compare prices, and 7% use them to scan coupons. Of those who have not yet done so, 22% expect they will make a purchase from their phone in the coming year, and 24% will use their devices to compare prices.

HOW AMERICANS WILL USE THEIR SMARTPHONE FOR SHOPPING IN THE COMING YEAR, 2010



NOTE: Of those who own a smartphone.

SOURCE: PriceGrabber

SOURCE: "Smartphone Shopping Behavior," PriceGrabber, Sara Rodriguez, Market Research Analyst, 5150 Goldleaf Circle, 2nd Fl., Los Angeles, CA 90056; 323-601-1282; sara@pricegrabber.com; www.pricegrabber.com.

## Men And Women Have Different Concerns When Shopping Online

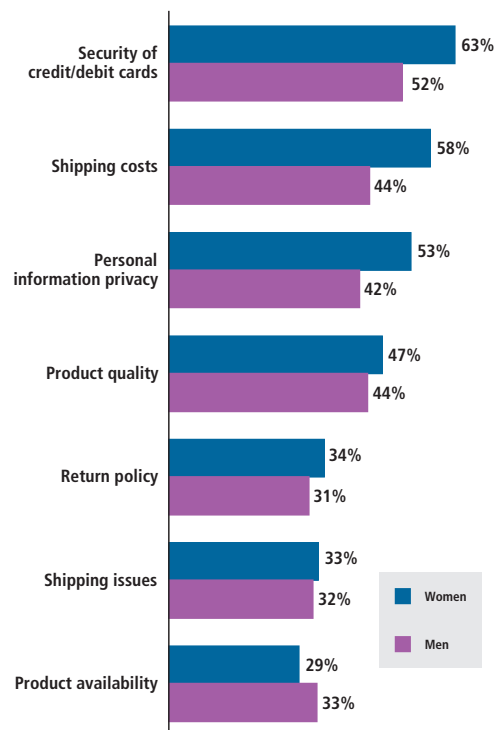
Men and consumers with annual household incomes greater than \$75,000 are more likely than average to say they will spend more money during the 2010 Christmas and Hanukkah season compared to a year ago, according to Burst Media. Nearly a quarter of male shoppers (22%) expect to spend more than a year ago, compared to 13% of female shoppers who say the same. Conversely, 40% of women expect to spend less than a year ago, compared to 28% of men.

A majority of consumers (57%) plan to make at least one gift purchase online during the 2010 holiday season. That includes 9% of shoppers who did not make a 2009 holiday gift purchase online.

Comparison shopping is a key driver of online shopping, with 34% of consumers saying they shop online to research and compare brands. The same proportion (34%) shop online to compare retailers and find the best price. Nearly a quarter (24%) do so to find the closest store location, and 22% do so to find products that are only available online.

When shopping online, women are more concerned than men about security of personal information, shipping costs, and product quality. Men are more concerned than women about product availability.

CONCERNS WOMEN AND MEN HAVE ABOUT SHOPPING ONLINE 2010



SOURCE: Burst Media

**SOURCE:** "Holiday Spending Season: Consumer Intentions And Attitudes In Q4 2010," Burst Media, Chuck Moran, Director Marketing, 8 New England Executive Park, Burlington, MA 01803; 781-852-5291; cmoran@burstmedia.com; www.burstmedia.com. Price: Available online at no charge.

## Women Share Opinions, Positive Experiences Via Word Of Mouth

Word of mouth is a key source of information for women shoppers; 92% of them seek advice from friends and family about products and services they are considering purchasing, according to Harbinger. In addition, a majority share information via word-of-mouth. Even with strangers, women are more likely to share face-to-face (36%) than via a website (32%) or social networking site (27%).

Nearly nine in 10 women (88%) seek information on appliances when planning a purchase. When they go in search of information, they are motivated to:

- ▶ Determine the best quality or best value (78%);
- ▶ Get product specs (67%);
- ▶ Find the lowest price (66%);
- ▶ Get opinions and references from other consumers (61%); and
- ▶ Learn what's best for them and their families (57%).

The 80% of women who share information about appliances are motivated to:

- ▶ Share good experiences (80%);
- ▶ Share bad experiences (73%);
- ▶ Help others make smart purchases (67%); and
- ▶ Help improve a product (28%).

A slight majority of women (53%) seek others' opinions on food and beverage items, but to a far lesser extent than they do for a major purchase category such as appliances. When they do seek information on food and beverages, it is to:

- ▶ Learn what's best for them and their families (32%);
- ▶ Determine what is the best value (31%);
- ▶ Determine what is the best quality (30%);
- ▶ Find the lowest price (29%); and
- ▶ Get opinions and references from other consumers (25%).

Women are more motivated to share their opinions about food and beverage items; 67% do so, particularly to:

- ▶ Share good experiences (58%);
- ▶ Share bad experiences (46%);
- ▶ Help others make smart purchases (36%);
- ▶ Help improve a product (15%).

While consumers' negative reviews can generate a fair bit of buzz, marketers should note that more women say they are motivated to share their positive experiences than negative experiences for both product categories.

**SOURCE:** "Women And Word-Of-Mouth," Harbinger, Deborah Adams, SVP, 252 Adelaide St. E, Toronto, ON M5A 1N1, Canada; 416-960-5100; dadams@harbingerideas.com; www.harbingerideas.com. Price: Call for information.

## 2010 Holiday Shopping Season Has Begun, Consumers Will Go Online

A third of Americans (34%) had begun their holiday gift shopping as of October 2010 —17% started in order to take advantage of deals, 12% to ensure they stay within budget, and 5% to take advantage of the larger selection available at the beginning of the season — according to comScore. Another third (33%) have not even begun to think about holiday shopping.

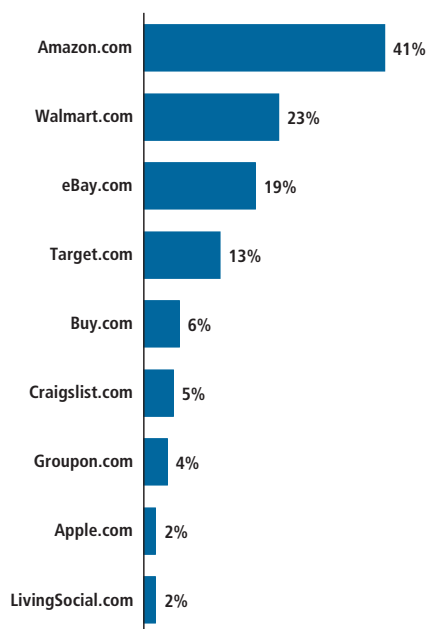
One in six (17%) plan to shop closer to the holidays when they have a better idea of how much money they can spend, whereas 16% have not started because they do not have money to put toward gift spending.

The vast majority of shoppers (84%) say finding discounts and coupons is important to their holiday purchase plans.

Nearly a third (31%) decide what gifts to purchase and where to buy them based on the available discounts or coupons. More than four in 10 (42%) search for discounts and coupons when comparing possible gift options and stores. Fewer than one in five (18%) decide on the gift they intend to buy and where to buy it before searching for applicable discounts or coupons. The remaining 9% claim they never search for discounts or coupons for holiday gifts.

Online retailers will have an impact on the 2010 holiday shopping season, with a significant portion of shoppers planning to visit such websites.

ONLINE RETAILERS THAT CONSUMERS INTEND TO VISIT TO SHOP FOR/PURCHASE HOLIDAY GIFTS, 2010



**SOURCE:** comScore

**SOURCE:** "State Of The Online U.S. Retail Economy," comScore, Gian Fulgoni, Chairman, 11465 Sunset Hills Rd., #200, Reston, VA 20190; 202-438-2000; gfulgoni@comscore.com; www.comscore.com. Price: Call for information.

## factoids

- ▶ Nearly four in 10 shoppers (39%) decided not to make a purchase during the 2009 holiday season because a **coupon or discount** was not available for the item they wanted to buy, up from 20% the prior year. (*Motorola; phone: 631-738-4751*)
- ▶ **Rewards programs** were more important during the recession to 32% of consumers when shopping retail stores, compared to 24% when shopping financial services, and 22% when shopping travel. (*Colloquy; phone: 513-248-5918*)
- ▶ A majority of shoppers who used a coupon to make an **online purchase** (57%) would not have bought the item if they had not received a discount. (*Compete; phone: 617-933-5600*)
- ▶ More than nine in 10 shoppers who **used a coupon** on a recent purchase (91%) would make another purchase from the same retailer, compared to 86% of those who did not use a coupon. (*Compete; phone: 617-933-5600*)
- ▶ Shoppers redeemed 7.9% more **coupons** in the first half of 2010 than in the first half of 2009, saving nearly \$2 billion, a 37% increase in savings over the same period. (*Valassis; phone: 734-591-7375*)
- ▶ Only 18% of mattress buyers say they were ready to make a purchase after shopping online, compared to about 67% who say their online research did not help them choose a **brand of mattress**. (*Sealy; phone: 312-616-2589*)

# shopping & spending

Purse strings have loosened somewhat as the recession has worn on and the economy has shown signs of improvement, but a majority of consumers are still cutting back expenses in an effort to save a little here and there.

In the past few years, Americans have continually reevaluated what they are willing to trade down on and what they can do without or have less of. They will likely stick with the strategies they have adopted — couponing, buying private label, budgeting, etc. — for the foreseeable future.

Demographic differences have impacted Americans' attitudes toward the recession, which have in turn had various affects on their spending:

- ▶ Boomers feel they no longer have the financial security that they have worked their whole lives for, and as a result, they are among the most likely to have significantly changed their spending habits.
- ▶ Gen Xers are working on building their lives and families, and have little left over to save, which leaves them with a bleak outlook on retirement.
- ▶ Millennials realize their dreams of career, home, and children may have to wait as the economy recovers. They found out that their parents are not always able to help them out financially and are learning to manage their money better.
- ▶ Hispanics and Blacks are optimistic about economic recovery, and as a result are not worried about delaying major purchases.

The steady growth in online spending in the prior decade was interrupted in 2009 as consumers kept a tighter rein on their budget, but online spending bounced back in 2010. One driver of that recovery is the growing number of those who shop via mobile phone.

Undoubtedly, Americans have their preferred brands, but budget issues have forced some consumers to skip the brands they prefer to find cheaper options. In other cases, they stray from brands whose images have been tarnished. Consumers' impressions of brands can be shaped by media coverage of brands that have made a misstep. However, shoppers are less swayed when a brand spokesperson is the one who made the mistake.

## For Most Recession Strategies Reign: Small Cutbacks Save Americans Money

The majority of Americans continue to take money-saving measures in 2010, such as buying more generic brands than in the past and going to their hairdresser or barber less often, according to Harris Interactive. Fewer Americans are saving money by canceling a magazine subscription in October 2010 than in October 2009. More are canceling their landline phone service and using only their cell phone over the same period.

Those aged 34-45 are more likely than others to employ a variety of money-saving cutbacks. The least likely are 18-33 year olds and those aged 65 and older. Those aged 18-33 are significantly less likely than those aged 34 and older to have canceled a magazine subscription. Those under age 45 are more likely than their older peers to have canceled their

landline phone service in favor of using only their cell phones.

**SOURCE:** "Americans Still Cutting Back On The Small Things To Save Money," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

## Annual Spending Varies City To City, Household To Household

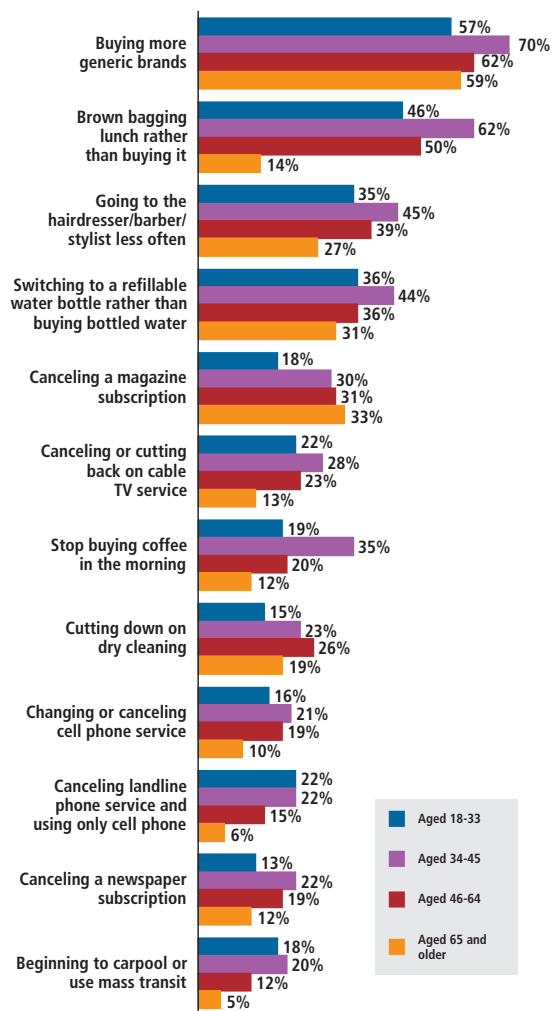
The average American household spends \$37,782 per year (excluding housing expenses, such as mortgage or rent payments), according to Bundle. They spend 23% of their budget on shopping (\$8,668); 21% on health and family expenses including insurance, childcare, and school costs (\$8,026); 17.5% on food and drink (\$6,514); 17% on house- and home-related goods and services (\$6,398); 14.5% on transportation (\$5,477); and 7% on travel and leisure (\$2,699).

The cities with the highest spending are:

- ▶ Austin, TX (\$67,076);
- ▶ Scottsdale, AZ (\$64,687);
- ▶ San Jose, CA (\$52,085);
- ▶ Arlington, VA (\$52,085); and
- ▶ Plano, TX (\$56,738).

Spending varies widely by household type. Not surprisingly, married households with children spend the most (\$46,160), while single person households spend the least (\$30,739 for single men and \$25,928 for single women).

**MONEY SAVING STRATEGIES THAT AMERICANS HAVE EMPLOYED IN THE PRIOR SIX MONTHS, BY AGE, 2010**



**SOURCE:** Harris Interactive

**HOUSEHOLD SPENDING BY CATEGORY, BY HOUSEHOLD TYPE, 2010**

HOUSEHOLD TYPE	SHOPPING	HEALTH AND FAMILY	FOOD/DRINK	HOUSE AND HOME	TRANSPORTATION	TRAVEL AND LEISURE
Married, w/ children	\$11,485	\$9,160	\$7,922	\$7,448	\$11,485	\$3,243
Married, no children	\$8,870	\$9,002	\$6,793	\$7,019	\$6,902	\$2,939
Single parent	\$7,471	\$6,358	\$5,475	\$5,304	\$4,694	\$2,109
Single man	\$6,093	\$6,297	\$5,665	\$5,593	\$4,825	\$2,276
Single woman	\$6,187	\$5,684	\$4,488	\$4,721	\$3,166	\$1,682

**SOURCE:** Bundle

**SOURCE:** "How America Spends," Bundle, Jaidev Shergill, Founder, 149 5th Ave., 4th Fl., New York, NY 10010; www.bundle.com. Price: Available at no charge.

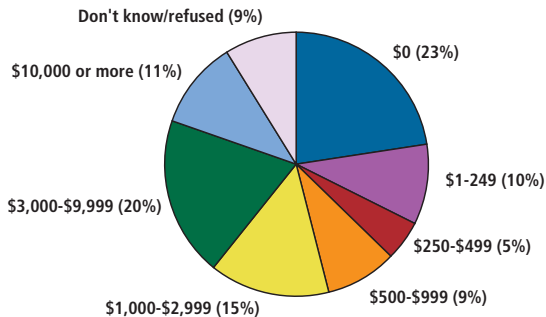
## Americans' Credit Card Debt Dwindles

Two thirds of American households (68%) have at least one credit card, according to Associated Press and GfK Roper Public Affairs. More than six in 10 card holders (61%) used their card for a purchase or cash advance in the prior month. Of those, 71% paid off the full amount of the charges they incurred, while 29% carried a balance.

Only 23% of card holders do not owe any amount on their credit cards. Overall, credit card holders owe a mean of \$3,900 on their cards, and an average of \$905. Both amounts are a decline from 2009 when Americans owed a mean \$4,900, and an average of \$1,000.

Nearly one in 10 (9%) have reached the credit limit on at least one of their cards, and the same proportion (9%) did not pay at least the minimum amount due on one of their cards in the prior six months.

AMOUNT AMERICANS OWE ON THEIR CREDIT CARDS, 2010



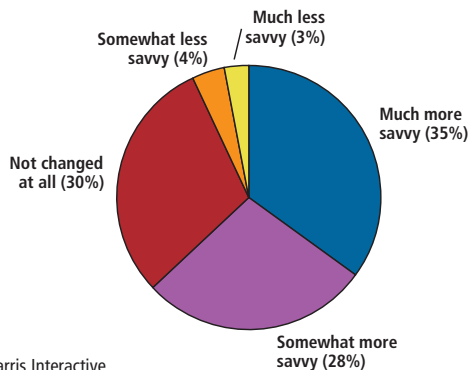
SOURCE: Associated Press and GfK Roper Public Affairs

SOURCE: "Stress And Debt Poll," Associated Press Polls, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-240-5467; info@ap-gfcpoll.com; www.ap-gfcpoll.com.

## Shoppers Are Smarter, But Marketers Are Not

Most shoppers think they have become savvier since the recession, including 35% who think they are much savvier, according to Harris Interactive and *Adweek*. Those aged 35-44 and 55 and older (40% each) are more likely than average to think they are much savvier shoppers, compared to 27% of those aged 18-34 who are least likely to say so. Men (38%) are more likely than women (31%) to claim they have become much savvier.

HOW CONSUMER BELIEVE THE RECESSION HAS AFFECTED THEIR SHOPPING ACUMEN, 2010



SOURCE: Harris Interactive

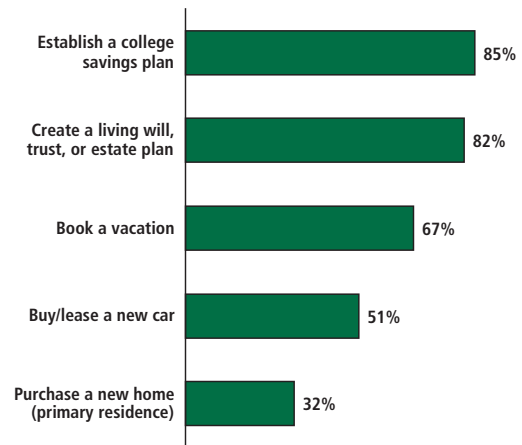
Meanwhile, few shoppers (18%) think that marketers have significantly changed the way they market brands or products during the downturn, and only 8% think they have not changed at all.

SOURCE: "Harris Poll, June 2010," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

## New Parents Spend On Baby, Household

The average new family household spent \$3,342 during its first year of parenthood (including pregnancy but not gifts), according to TheBump.com. More than eight in 10 new moms (82%) have a baby shower, and 86% of those register for gifts. Most (69%) take advantage of free product samples they receive in pregnancy/parenting gift packs.

ITEMS NEW PARENTS PLAN TO SPEND ON DURING THE FIRST YEAR OF PARENTHOOD, 2009



SOURCE: TheBump.com

SOURCE: "Second Annual Pregnancy and Baby Study," TheBump.com, Jacalyn Lee, Public Relations Manager, 462 Broadway, 6th Fl., New York, NY 10013; 212-219-8555, x1013; pr@thebump.com; www.thebump.com.

## Walmart Is The Top Place For Back-To-School Supplies

Walmart (64%) and Target (47%) are the top destinations for back-to-school supplies, according to Kantar Retail.

More than one in three shoppers (35%) purchase supplies at an office supply retailer such as Office Max or Office Depot, and 27% buy supplies at dollar stores or close-out retailers.

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**TOP DESTINATIONS TO PURCHASE BACK-TO-SCHOOL SUPPLIES, 2010**

Walmart	.64%
Target	.47%
Office supply retailer (Office Max, Staples)	.35%
Dollar/close-out stores (Big Lots, Family Dollar)	.27%
Other discount store (Kmart, Meijer)	.15%
Warehouse Club (Costco, BJ's)	.13%
Drug store retailer	.11%
Supermarkets (Kroger, Safeway)	.7%
Department store retailer	.6%
Value department store (Kohl's, JCPenney)	.6%
Consumer electronics retailer (The Shack, Best Buy)	.5%

NOTE: More than one response permitted

**SOURCE:** Kantar Retail

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**SOURCE:** Kantar Retail, Katherine Clarke, Two Easton Oval, #500, Columbus, OH 43219; 614-355-4009; katherine.clarke@kantarretail.com; www.retailforward.com.



## Consumer Opinions About Brands Are Malleable, Influenced By Familiarity, Positive And Negative News

Americans are reaching a height of activism in politics and government in 2010. They are empowered by an ever-growing amount of media coverage of politics and corporations, not only in traditional media, but also in social media, according to Vision Critical.

Based on their political knowledge and willingness to donate time and money, Americans fall into one of four segments:

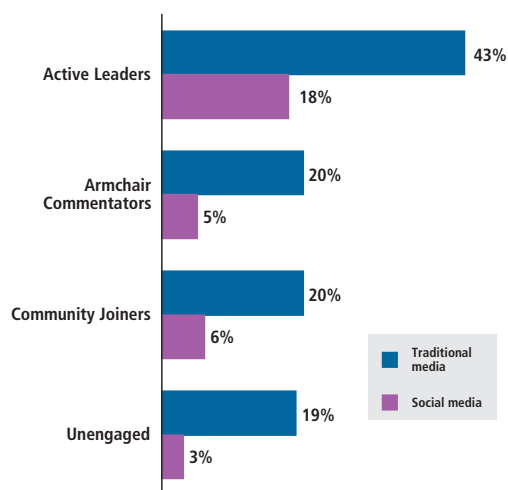
Active Leaders (13%) are particularly knowledgeable about politics and government and are very outspoken. They volunteer and donate money to causes and individuals whose ideas they support. Nearly all are registered to vote and tend to be on the extremes of the political spectrum. They are more than three times as likely as the other segments to get news from social media.

Armchair Commentators (36%) are also politically knowledgeable and outspoken, but less engaged. They don't volunteer, and few donate money to political or community organizations.

Community Joiners (16%) are reasonably knowledgeable about politics and are willing to donate time to causes they support. They are not outspoken. They are active with community organizations, but tend not to donate money.

Unengaged (35%) are moderate in their views and tend not to be particularly knowledgeable about politics or the government. They are the least likely to follow news in traditional and social media. They do not volunteer or donate money to community causes or organizations. They are also they least likely to be registered to vote.

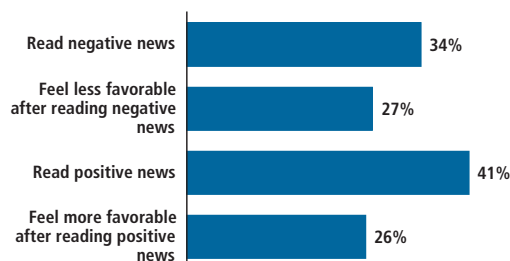
CONSUMERS WHO READ NEWS ABOUT COMPANIES IN TRADITIONAL AND SOCIAL MEDIA, BY ACTIVIST SEGMENTATION, 2010



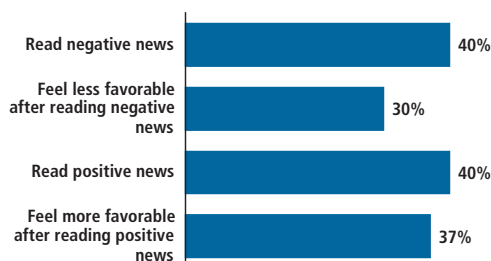
SOURCE: Vision Critical

HOW CONSUMERS OPINIONS OF CORPORATIONS ARE AFFECTED BY POSITIVE OR NEGATIVE NEWS, TRADITIONAL VS. SOCIAL MEDIA, 2010

### TRADITIONAL MEDIA



### SOCIAL MEDIA



SOURCE: Vision Critical

Only a third of Americans believe that corporations are trustworthy, while a quarter think they are greedy and arrogant. However, the more knowledgeable the consumer, the more likely he or she is to have a favorable opinion of corporations — even for the day's most reviled companies, such as post-Gulf oil spill BP. An average of 39% of Americans have a favorable view of the 54 corporations in the Vision Critical study, but that proportion rises dramatically to 63% among those familiar with the corporations.

Consumers' many negative sentiments towards big corporations include:

- ▶ Their executives care more about making money than the long-term health of the company (31%, on average for all 54 companies);
- ▶ The corporations put profits ahead of what is good for the U.S. (30%);
- ▶ The companies' best days are behind them (25%).

In more general terms, they also think corporations are greedy (29%), secretive (28%), arrogant (26%), and idiots (23%).

Active Leaders are the most knowledgeable segment of consumers, and their peers hear their outspoken opinions. Active Leaders are more likely than the other segments to read news about companies in both traditional and social media. They have significantly more favorable opinions of Boeing, Goldman Sachs, Aetna, and Glaxo, and significantly more negative opinions of Halliburton, BP, Exxon, and General Electric.

Overall, 30% of Americans read news about corporations

in traditional media and 9% in social media. Consumers' opinions are affected by the media. When they read something positive (both in traditional and social media), they have a more positive opinion of the corporation. When they read something negative, they take more of a dim view.

For example, 86% of Americans saw news about BP in traditional media in late April 2010. Some 92% of the news was negative, and 77% of those who read negative news are now less favorable toward the oil company. A third of Americans (33%) saw negative news about BP in social media. Again, the vast majority (94%) said the news was negative, and 79% had a less favorable opinion of BP.

### Affluent Opinions

Aspirational, affluent, and wealthy Americans — defined on a scale beginning with those with annual household incomes in excess of \$75,000 — list technology brands as those that make them most happy, according to the Affluence Collaborative. More than a quarter cites Apple (27%), followed by Microsoft (24%), Best Buy (22%), and Sony (20%). Apple (51%), Microsoft (33%), and Sony (28%) also top their list of most innovative. At the opposite end of the spectrum, they most commonly cite fashion brands as the most boring.

Though the results may seem to be skewed by more affluent men, in fact, technology brands are also among those that make women happiest, mixed amid coffee and chocolate brands.

#### BRANDS THAT MAKE ASPIRATIONAL, AFFLUENT, AND WEALTHY AMERICANS HAPPY, WOMEN VS. MEN, 2010

MEN	WOMEN
Microsoft . . . . . 27%	Apple . . . . . 28%
Apple . . . . . 27%	Starbucks . . . . . 24%
Best Buy . . . . . 25%	Godiva . . . . . 24%
Sony . . . . . 25%	Microsoft . . . . . 22%
BMW . . . . . 24%	Ghirardelli . . . . . 19%

NOTE: Aspirational, affluent, and wealthy Americans are defined on a scale beginning with those with annual household incomes of \$75,000.

SOURCE: Affluence Collaborative

SOURCES: "Reputation Plus+," Vision Critical, Matt Worden, Director Business Development, 505 Fifth Ave., 18th Fl., New York, NY 10017; matt.worden@visioncritical.com; www.visioncritical.com. Price: Call for information.

"2010 Quarterly Report," Affluence Collaborative, Julie Sacks, 345 Seventh Ave., 7th Fl., New York, NY 10001; 212-225-9306; jsacks@affluencecollaborative.com; www.affluencecollaborative.com. Price: Call for information.

### Celebrity Scandals Do Not Affect Brands

Most adults (74%) say that when a celebrity endorser of a brand is involved in a scandal, it does not affect their opinion of that brand, according to Harris Interactive. Only 22% have a worse opinion of the brand following a scandal, and 5% have a better opinion.

This varies based on the age of the consumer:

- ▶ 68% of 18-34 year olds say it does not affect their opinion; as do
- ▶ 77% of 35-44 year olds;
- ▶ 70% of 45-54 year olds; and
- ▶ 81% of those 55 and older.

The youngest consumers, aged 18-34, are the most likely to say that a scandal improves their opinion of a brand (11%), while those aged 45-54 (28%) are most likely to say it damages their opinion.

There is little difference based on region, except in the conservative Midwest, where 71% say a scandal would not affect their opinion (the least of any region), and 26% say it would give them a worse opinion of the brand (the most of any region).

SOURCE: "Celebrity Endorsements," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

### Some Shoppers Don't Buy Brands They Want, Make Compromises

The recession tested Americans' brand loyalty, and in some categories brands lost the battle to lower-priced alternatives (including private labels) and sale items, according to comScore.

The categories hit hardest are over-the-counter medications (the proportion buying the brands they wanted most

#### CONSUMERS WHO BUY THE BRANDS THEY MOST WANT, SELECTED ITEMS, 2008 VS. 2010

	BOUGHT BRANDS MOST WANTED IN 2008	BUY BRANDS MOST WANTED IN 2010	CHANGE '08 TO '10
<b>HEALTH &amp; BEAUTY AIDS</b>			
Toothpaste	67%	57%	-14%
Mouth rinse	61%	44%	-28%
Shampoo	65%	52%	-20%
<b>OVER-THE-COUNTER MEDICATION</b>			
Cough, cold, and allergy	58%	43%	-26%
<b>FOOD</b>			
Soup	56%	52%	-7%
Pasta sauce	53%	45%	-15%
Fruit juice	51%	40%	-22%
<b>HOUSEHOLD PRODUCTS</b>			
Laundry detergent	57%	47%	-18%
Facial tissue	43%	39%	-9%
Paper towels	36%	35%	-3%
<b>HOUSEWARES</b>			
Small appliances	45%	34%	-24%
<b>APPAREL</b>			
Jeans	54%	39%	-28%

SOURCE: comScore

fell 15%), apparel (down 15%), health & beauty aids (down 14%), housewares (down 11%), food (down 7%), and consumables (down 5%).

Brand switchers are driven by a desire to save money, but their strategy for doing so varies by category. When they were unable to buy their preferred brand, shoppers for over-the-counter meds were more likely to switch to a brand on sale (10%) than to a less expensive brand (5%). The same is true of those who switched brands of housewares, with 7% buying a sale brand and 4% buying a cheaper brand.

On the other hand, in the apparel category, shoppers were more likely to buy a cheaper brand (12%) than a sale item (3%). Those who bought an alternative brand of health and beauty aids were split, with 7% switching to less expensive brands and 7% buying sale brands.

**SOURCE:** comScore ARS, Wendy Preiser, 110 Walnut St., Evansville, IN 47708; 812-759-2264; wpreiser@comscore.com; www.arsgroup.com. Price: Call for information.

## National Brands Hang Tough Against Private Label Products

In some categories dominated by national brands, private label offerings are slowly stealing market share — but not in all categories, finds Nielsen Company.

National brands' dominance was most threatened in 2009 in the category of frozen meal starters. National baby food brands were also under siege, with unit sales of private label brands increasing nearly 25%. Sales of private label wine, beer, and liquor also posted strong growth, but with alcohol sales up overall during the recession, national brands also demonstrated minor growth.

**UNIT CHANGE IN SALES OF NATIONAL AND PRIVATE LABEL BRANDS, IN NATIONAL BRAND-DOMINATED CATEGORIES, YEAR ENDING OCTOBER 3, 2009**

SHARE	NATIONAL BRAND CATEGORY BRANDS	UNIT CHANGE OF NATIONAL LABEL BRANDS	UNIT CHANGE OF PRIVATE
Frozen meal starters	100.0%	-18%	20,615%
Beer	99.8%	1%	12%
Gum	99.5%	2%	0%
Wine	99.1%	5%	11%
Refrigerated meal starters	98.3%	64%	0%
Baby food	97.2%	-7%	23%
Liquor	96.4%	2%	13%
Candy	94.9%	-5%	6%
Pudding/desserts, dairy	94.9%	-3%	-33%
Frozen prepared foods	93.8%	1%	4%
Baking mixes	93.5%	4%	7%

**SOURCE:** Nielsen

**SOURCE:** "Nielsen Homescan," Nielsen Company, Todd Hale, SVP Consumer & Shopping Insights, 770 Broadway, New York, NY 10003-9595; 646-654-5000; www.nielsen.com. Price: Call for information.

## Brands On Social Media's Effectiveness

While social media is critical in order to reach today's youth, brands are split on whether these tools make it easier to create brand loyalty, according to brand design agency MiresBall and KRC Research; 35% say it does, 34% are neutral, and 30% feel social media makes it harder to create brand loyalty.

Four in 10 brand marketers (41%) say the impact of social networking sites on their brands is insignificant, while 34% say it's influenced them to change strategies. That said, 80% of marketers expect to use social media effectively for brand-building activities within the next two years.

- ▶ Half of brand executives (49%) say social media must be aligned to the brand in order to be successful.
- ▶ Social media is not fragmenting their audience. Some 15% of executives feel social tools actually make it harder to reach customers.
- ▶ 52% believe social media allows them to reach new customers who were previously unreachable.
- ▶ Most brand executives (68%) believe online communications, such as maintaining a website, provide the best return on investment, 56% say PR/promotional events are most effective, and 40% say social media.
- ▶ Print advertising is viewed as the most effective form of paid media for brand building (52%), followed by broadcast advertising (38%), and outdoor advertising (32%).

### TIME BEFORE BRAND EXECUTIVES ARE ABLE TO EFFECTIVELY LEVERAGE SOCIAL MEDIA FOR YOUTH-ORIENTED BRAND-BUILDING, 2010

Currently using social media effectively	22%
One year from now	29%
Two years from now	29%
3-5 years from now	13%
More than five years from now	.8%

NOTE: Percentages exceed 100% due to rounding

**SOURCES:** MiresBall, KRC Research

### MOST EFFECTIVE CHANNELS FOR BRAND COMMUNICATION, ACCORDING TO BRAND EXECUTIVES

Word-of-mouth	87%
Online (web, interactive)	86%
Customer service	85%
Public relations	78%
Print advertising	52%
Direct mail	44%
Broadcast advertising	38%

**SOURCES:** MiresBall, KRC Research

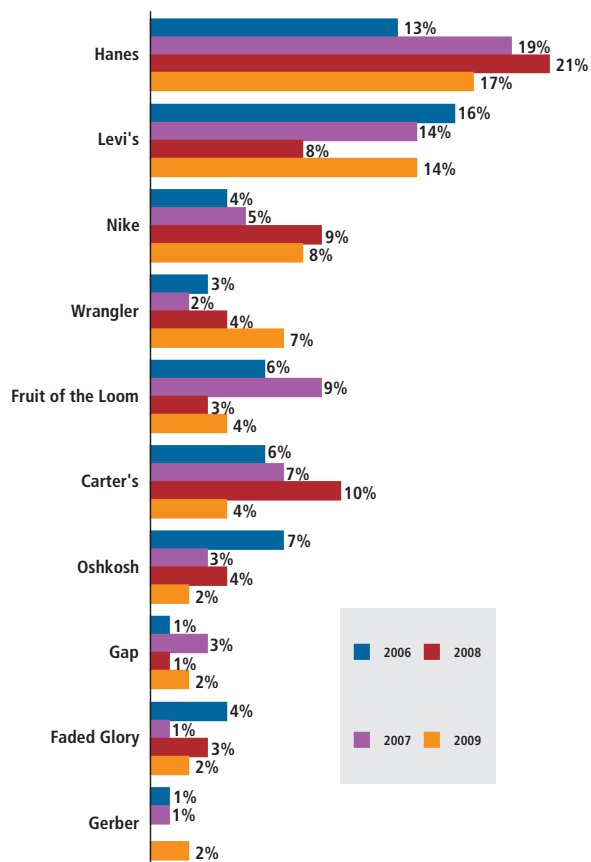
**SOURCES:** KRC Research, Vicki Sneed, EVP, 700 13th St., NW, Washington, DC 20005; 202-585-2814; vsneed@krcresearch.com; www.krcresearch.com.

MiresBall, Rachel Kerestes, 2345 Kettner Blvd., San Diego, CA 92101; 619-234-6631; Rachel@miresball.com; www.miresball.com.

## Hanes, Levi's Are The Most Sought Kid Apparel Brands

While only half of all shoppers (50%) express a brand preference among children's apparel, those who do favor two brands: Hanes and Levi's, according to *Retailing Today*. The report monitors shoppers' unaided expectations when it comes to brand names they look for at mass market retailers. Gap and Gerber are two brands new to the list in 2009, while Pampers and Dockers fell out of the top 10.

TOP CHILDREN'S APPAREL BRANDS, 2006-2009



SOURCE: *Retailing Today*

SOURCE: "Retailing Today 2009 Top Brands Survey," *Retailing Today*, Leo J. Shapiro, George Rosebaum, President, 153 W. Ohio St., #300, Chicago, IL 60610; 312-321-8111; www.ljs.com.

## What Teens, Young Adults Ask About Brands

Online and mobile search queries allow users to ask pretty much anything, with many questions pertaining to brands, according to Frost & Sullivan. Its ChaCha service provides answers to any query and finds many young consumers often seek answers to similar questions:

**Retail.** Girls under age 18 are most likely to ask retail-based questions, notably "What is Hollister?" Apparently many wonder about this brand, since 36% of all questions

during a three-month period relating to retail clothing lines concerned Hollister. Teen girls, in particular, also care what others think of brands, asking if others wear a specific brand and are interested in new products and trends. Two in three of those aged 13-24 (65%) ask about store locations and price. Two in 10 (20%) wonder about the meaning behind logos, and 10% seek to learn about pricing. Although Juicy Couture receives fewer questions than Hollister, Abercrombie & Fitch, and Urban Outfitters, the questions regarding the lifestyle brand are the most product-specific.

**Denim.** Girls predominantly seek answers to denim questions, with 7 For All Mankind as the preferred brand for those age 13-17 and True Religion for those 18-24. Some 62% of True Religion questions concern location, specifically if Wal-Mart and Costco carry the brand.

**Shoes.** Nike (77%) receives four times as many shoe-related questions from teens as Adidas (17%), Reebok (4%), or New Balance (2%). Whereas girls are interested in denim, boys care about footwear. Teens tend to inquire about Nike's history, seeking information about its founder and about what Nike means. From a product standpoint, most of the questions pertain to its SB skateboarding line. However, the cool factor of specific shoes is more important than price. Teens also are interested in the shoes of professional athletes, sports teams, and celebrities.

**Soda.** Older teens prefer lighter sodas, such as 7-Up and Sprite, whereas younger teens tend to go for the darker cola brands, such as Coke, Pepsi, and Dr Pepper. Younger teens tend to seek advice on what to drink, while the older segment is interested in learning about brand origins and trivia.

SOURCE: Frost & Sullivan, Mireya Castilla, Information & Communication Technologies, 7550 IH 10 W., \$400, San Antonio, TX 78229; 210-247-3830; mireya.castilla@frost.com; www.frost.com.

## LG Brand Tops Among Teen Cell Users

Although Nokia is the top mobile phone globally, U.S. teens prefer LG, according to Sulake, operator of the Habbo Hotel virtual world. LG's popularity among U.S. teens has grown considerably, from its seventh position in 2008. While Apple's iPhone ranked 15th globally in 2008, it came in fifth among global teens and third among U.S. teens in 2009.

MOST POPULAR MOBILE PHONE AMONG U.S. TEENS, 2009

LG	11%
Samsung	7%
Apple	7%
Motorola	6%
T-Mobile	5%
AT&T	5%
Blackberry	4%
Nokia	2%
Sprint Nextel	2%
Sony Ericsson	2%

SOURCE: Habbo/Sulake

**SOURCE:** "Global Habbo Youth Study, 2009," Sulake, Teemu Huuhtanen, President, North America, 225 Santa Monica Blvd., #400, Santa Monica, CA 90401; 310-395-0404; teemu.huuhtanen@sulake.com; www.sulake.com.

## American Eagle Tops Among Teens

American Eagle is the top clothing brand for teens, beating out Forever 21, Hollister and Aeropostale, according to C&R Research. Denim remains a teen staple, which is why their favorite brands all carry a large assortment of denim offerings.

The brands teens wear often mean more than just wearing a t-shirt, says C&R Research's Amy Henry. "It's their form of identity expression. They won't wear one label head-to-toe because they want to say they are more complicated than a [one-label] girl." At the same time, teens use clothing brands to fit in with their peers. "They will all wear the same shirt, it'll just be in different colors."

### TEENS' FAVORITE CLOTHING BRANDS, 2010

1. American Eagle
2. Forever 21
3. Aeropostale
4. Hollister
5. Levi's

**SOURCE:** C&R Research

**SOURCE:** C&R Research, Amy Henry, VP Youthbeat, 500 N. Michigan Ave., Chicago, IL 60611; 312-828-9200; ahenry@crresearch.com; www.crresearch.com.

## College Students Love The Swoosh

For the fifth straight year Nike ranks as the most favored brand by college students, while Apple lodges second for the third straight year, according to Anderson Analytics.

Top brands among specific categories include *Cosmopolitan* as the favorite magazine, McDonald's as the preferred fast food restaurant, *Twilight* as the favorite book, and FreeCreditReport.com as the most liked commercial.

### MOST POPULAR BRANDS AMONG COLLEGE STUDENTS, BY SCHOOL YEAR

'09-'10	'08-'09	'07-'08
1. Nike	1. Nike	1. Nike
2. Apple	2. Apple	2. Apple
3. American Eagle	3. American Eagle	3. Sony
4. Sony	4. Sony	4. Gap
5. Old Navy	5. Gap	5. Adidas
6. Abercrombie	6. Old Navy	6. Old Navy
7. Gap	7. Coca-Cola	7. Coca-Cola
8. Dell	8. Adidas	8. Dell
9. Microsoft	9. Dell	9. American Eagle
10. Adidas	20. Abercrombie	20. Pepsi

**SOURCE:** Anderson Analytics

Facebook is the overwhelming favorite social networking site with 82% of college males and 90% of college females viewing it as "cool." By comparison, MySpace was deemed "lame" by 31% of college students.

**SOURCE:** GenX2Z American College Student Survey, Anderson Analytics, Tom Anderson, Managing Partner, 154 Cold Spring Rd., #80, Stamford, CT 06905; 203-912-7175; toma@andersonanalytics.com; www.andersonanalytics.com.

## Visible Panty Line: The How And Why Of Americans' Underwear

Americans own an average of 17 pairs of underwear, with women slightly exceeding men (19 pairs vs. 16 pairs), according to Cotton Incorporated. More than seven in 10 (71%) plan for underwear purchases, compared to 67% who plan overall apparel purchases. Americans add to or replace their assortment of underwear every seven months.

Most shoppers (59%) buy underwear at a mass retailer such as Walmart, spending an average of \$4.08 per pair. Nearly one in five (18%) buy underwear at a chain store for an average of \$6.99 per pair. Some 13% buy at a specialty store for an average of \$10.48 per pair, and 9% buy at a department store for \$10.99 per pair.

Comfort (96%) and fit (96%) are the most common factors figuring into consumers' underwear purchase decisions, followed by quality (90%), softness (89%), and durability (88%). Consumers also say price (85%) and style (79%) are important. Color (61%) and brand (52%) are less likely to affect their purchase decisions. Some 55% of shoppers would like underwear to offer performance features such as moisture wicking or temperature control, though only 5% of underwear at retail offer such features.

Older Americans are more likely to cite brand as a factor in their underwear purchase decision, and less likely to say it is a factor in their overall apparel decisions. The opposite is true of younger Americans.

**SOURCE:** "Underwear: Building On The Basics," Cotton Incorporated, Richmond Hende, VP Marketing, 488 Madison Ave., New York, NY 10022; 212-413-8340; rhende@cottoninc.com; www.cottoninc.com. Price: Call for information.

## Kids Look To Parents For Back-To-School Shopping Style

Nearly two in three moms of 6-12-year-olds (62%) have purchased back-to-school clothing for their child specifically because it reminds them of something they wore as a child, according to *Parents* magazine and Lands' End. At the same time, a similar percentage (65%) feel back-to-school wardrobes need to reflect their child's personality. Also:

- ▶ 94% of children are "somewhat" or "very involved" in back-to-school shopping.
- ▶ Parents are the most influential in helping children select back-to-school clothes (81%), followed by friends (55%), and celebrities/sports figures (17%).
- ▶ 17% of kids will use their own money to help purchase back-to-school items.
- ▶ 20% of kids wear uniforms to school. Among those who wear uniforms, girls are most likely to customize them via accessories such as scarves and jewelry. Boys rely on shoes to spruce up their uniforms.
- ▶ 79% of moms of uniform-wearing students purchase clothes online.

- ▶ Price (99%) and quality/durability (98%) are the most important factors in purchasing back-to-school attire. Fewer than one in four moms (22%) purchase less expensive items because they believe their kids will swiftly outgrow or damage them.
- ▶ 55% of moms purchase items that can be worn or passed down to their other children; 85% of kids' current wardrobes contain previously worn items.

### PASSED DOWN CLOTHING ITEMS ACCEPTABLE TO WEAR TO SCHOOL

	CHILDREN	MOMS
Jackets	58%	75%
Jeans	53%	74%
Tops	51%	79%
Backpacks	38%	57%

**SOURCE:** Lands' End, *Parents*

**SOURCES:** Lands' End, Molly Hawkins, 5 Lands' End Ln., Dodgeville, WI 53595; 608-935-6089; molly.hawkins@landsend.com; www.landsend.com.

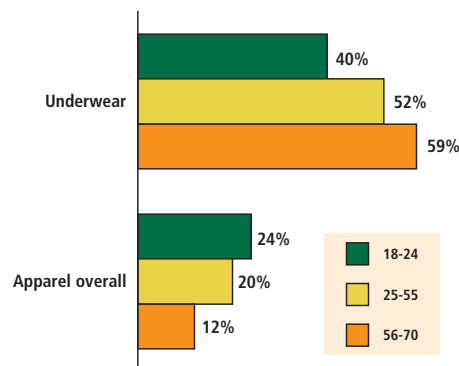
*Parents* magazine, Chandra Turner, Executive Editor, 375 Lexington Ave., 10th Fl., New York, NY 10017; 212-499-2000; chandra.turner@meredith.com; www.parents.com.

## Athletic Sock Shoppers Race To Mass Merchandisers For Purchases

Sales of cotton athletic socks with 51% or more cotton fiber content declined to 34% in 2009, down from 46% in 2007, despite consumers' stated preference for cotton athletic socks, according to Cotton Incorporated. That may be because fiber content does not rank as high on the scale of importance as do fit and comfort, durability, and style.

Americans are nearly twice as likely to buy their socks from a mass merchandiser (68%) as from a chain store (38%) or sporting goods store (28%). One in five (20%) buy athletic socks from warehouse clubs, and 21% buy from off-price stores. Avid athletes (36%), who exercise four or more days

### CONSUMERS WHO CITE BRAND AS AN IMPORTANT FACTOR IN UNDERWEAR AND APPAREL PURCHASES, BY AGE, 2010



**SOURCE:** Cotton Incorporated

a week, are more likely than moderate athletes (20%), who exercise less frequently, to buy their socks at a sporting goods store. In addition:

- ▶ Shoppers most often buy athletic socks in packages of six pairs (48%) or three pairs (22%).
- ▶ The most popular “special features” shoppers seek in athletic socks are moisture wicking (44% have ever bought socks with this feature), and odor resistance (25%).

**SOURCE:** “Consumer Athletic Sock Survey,” Cotton Incorporated, Richmond Hende, VP Marketing, 488 Madison Ave., New York, NY 10022; 212-413-8340; rhende@cottoninc.com; www.cottoninc.com. Price: Call for information.

## More Consumers Are Clipping Coupons, And Plan To Continue

Many consumers have turned to clipping coupons during the recession in an effort to stretch their budgets. They saved nearly \$3.5 billion in 2009, according to NCH Marketing, a division of Valassis.

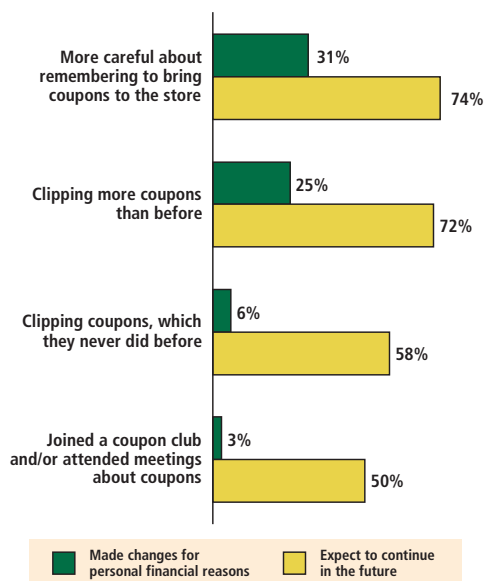
Retailers and manufacturers issued over 311 billion coupons during the year, an increase of 11% from 2008. Consumers redeemed 3.2 billion of those coupons, an increase of 23%.

Redemption rates improved for coupons increased for all delivery media. For example, consumers were 46% more likely to redeem direct mail coupons and 21% more likely to redeem online coupons. On-shelf coupons (redemption up 5%) and those in free-standing inserts (redemption up 3%) posted minimal gains.

Four in 10 shoppers (40%) use coupons often, up from 34% in 2007. In addition, 88% plan their shopping lists using their coupon stash, up from 78%.

Not only are more consumers using coupons, they are planning to continue to do so.

AMERICANS' COUPON USE AND INTENTIONS TO CONTINUE TO USE COUPONS, 2009



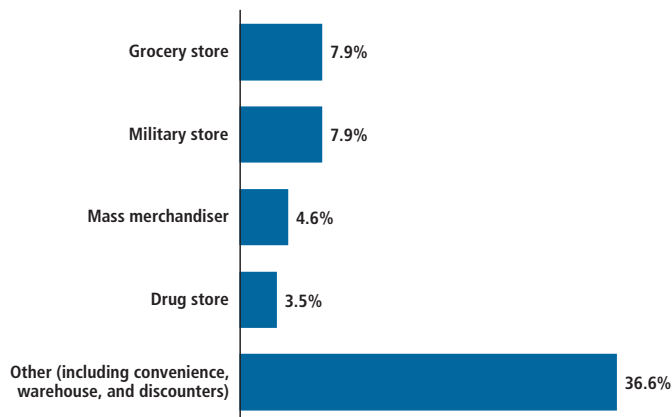
SOURCE: NCH/Valassis

SOURCE: "2009 Consumer Survey," NCH Marketing, Scott Drews, Sales, 155 Pfingsten Rd., Deerfield, IL 60015, 847-317-5513; sdrew@nchmarketing.com; www.nchmarketing.com. Price: Available online at no charge.

## Coupon Redemption Continues To Grow

Consumers redeemed 7.9% more coupons in the first half of 2010 than in they did in the first half of 2009, according to NCH Marketing. Consumers redeemed 6.3% more grocery

CHANGE IN CONSUMER COUPON REDEMPTION BY STORE TYPE, FIRST HALF OF 2009 VS. FIRST HALF OF 2010



SOURCE: NCH Marketing

coupons than the first half of 2009 and 12.0% more health and beauty care coupons.

Overall, consumers saved a total of \$1.9 billion in the first half of 2010, a 37% increase over the first half of 2008. The average value of the coupon redeemed was \$1.14, up from \$1.07 over the same period.

Shoppers redeemed more 25.2% more instant on-pack coupons on grocery items over the previous year, and 18.1% more Internet coupons. In the health and beauty category, they redeemed 32.2% more instant on-pack coupons and 12.5% more Internet coupons. These increases suggest that consumers are highly motivated to save and are seeking out deals online before entering the store, and that when they are in store they can be persuaded to spend to get instant deals.

SOURCE: "2010 CPG Coupon Facts Report," NCH Marketing, Scott Drews, Sales, 155 Pfingsten Rd., Deerfield, IL 60015, 847-317-5513; sdrew@nchmarketing.com; www.nchmarketing.com. Price: Available upon request at no charge.

## Consumers Make An Effort To Find Deals

Eight in 10 consumers (80%) spend up to three hours a week seeking out coupons, deals, and savings from a variety of sources, according to RedPlum. Their deal-seeking behavior would drive 91% to pass on a "perfect sweater" if it were not on sale, and 73% would only buy it if they could get it on sale with a coupon.

In fact, saving with coupons has become such a common behavior, 78% would not balk at the idea of using a coupon on a first date at a movie theater, and 77% would consider using a coupon on a first date at a restaurant.

Shoppers are willing to make an effort to earn savings. Nearly three quarters would sign up for an e-newsletter (74%) or fill out an online form (71%) to save 25%. More than one in five (22%) say they would do "just about anything" to get that level of savings.



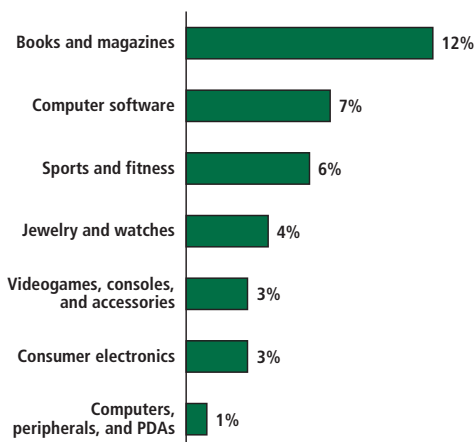
**SOURCE:** "Purse Strings Study," RedPlum (Valassis), Michael Kowalczyk, SVP and General Manager, 19975 Victor Pkwy, Livonia, MI 48152; 734-432-2707; kowalczykm@valassis.com; www.valassis.com. Price: Available online at no charge.

## Online Spending Declines For The First Time Ever In 2009

In the wake of the recession, American e-commerce spending fell 2% to \$209.6 billion in 2009 compared to 2008, marking the first year in which e-commerce spending declined, reports comScore. Travel, which accounts for the lion's share of online spending, fell 5% in 2009 to \$79.8 billion. Meanwhile, other e-commerce spending remained relatively flat.

Spending during the first 10 months of the year was down compared to the same month in the prior year, bottoming out in October, which dipped by 6%. Online spending rebounded during the holiday season, as November and December posted growth over the previous year.

### E-COMMERCE CATEGORIES POSTING POSITIVE GROWTH IN 2009 COMPARED TO 2008



SOURCE: comScore

SOURCE: "comScore 2009 U.S. Digital Year In Review," comScore, Sarah Radwanick, Senior Analyst, 500 W. Madison, #2980, Chicago, IL 60661; 312-775-6538; sradwanick@comscore.com; www.comscore.com. Price: Call for information.

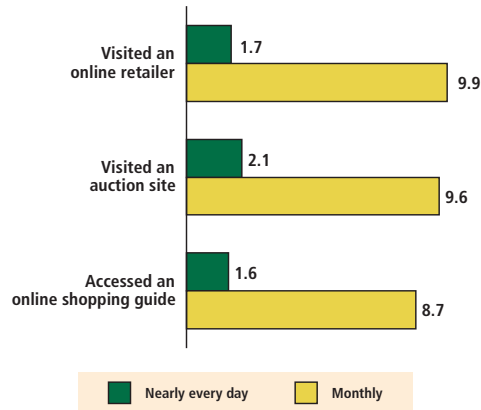
## Online Spending Stable Despite Recession

Total e-commerce spending in 2009 topped \$210 billion in 2009, down 2% from the prior year, according to comScore. Online spending on travel accounted for \$80 billion, down 5% from the prior year, and non-travel spending accounted for \$130 billion, flat compared to the prior year. The share of retail spending attributed to e-commerce remained stable in 2009 at 7.4%, with the peaks occurring in the first and last quarter, when it jumped to a 7.7% share.

As with in-store spending during the recession, top retailers won out in the online space as well. The top 25 retailers in terms of sales posted an 11% increase in online purchases in 2009, whereas all other retailers posted a 7% decline in online sales.

In addition, the mobile retail audience grew significantly, with 56% more people logging at least monthly to visit a

### CONSUMERS WHO ACCESS RETAIL WEBSITES FROM THEIR MOBILE PHONE, DECEMBER 2009 (In millions)



SOURCE: comScore

retailer's website from their phone, and an additional 48% accessing shopping guides. Some 33% more people visited online auction sites from their cell phones.

SOURCE: "State of the U.S. Online Retail Economy," comScore, Gian Fulgoni, Chairman, 11465 Sunset Hills Rd., #200, Reston, VA 20190; 202-438-2000; gfulgoni@comscore.com; www.comscore.com. Price: Call for information.

## Shifts In Attitudes And Technology Present Opportunities For Retailers

In the coming decade, changes in the demographics of the American population will drive shifts in shopper attitudes and technology habits that retailers will need to address in order to continue to be relevant to their consumers in the future, according to research presented at Kantar Retail's Strategic Outlook Conference.

### Generational Changes

By the year 2020, Americans aged 75 and older will account for 7% of the population, down from 13% in 2010; and those aged 56-74 will account for 21% of the population, down from 25%. Meanwhile, those under age 18 will account for 25% of the population, up from 11% in 2010.

Much of this shift is being driven by the relatively high age of White Americans, and the relatively young age of Hispanic Americans. Older Whites are nearing their final years of life. Younger Hispanics are entering the stage of life in which they are starting families. In addition, Hispanics tend to have larger families than Whites. Both of these factors account for the substantial projected growth in the share of the U.S. population that is of Hispanic descent.

### Changes In Values

Americans who were coming of age during the difficult economic conditions of the recession will not soon forget their efforts to cut back spending and struggling to make

ends meet. In 2010, 21% of apparel consumers made a shopping trip specifically to search for items on sale, and 41% looked for sale items during a typical shopping trip. Shoppers are less likely to specifically go grocery shopping to look for sale items (9%), but 36% look for sale items during a trip to the grocery store. Similarly, only 6% specifically go grocery shopping to buy something for which they have a coupon, but 32% look for an item for which they have a coupon during a grocery shopping trip.

**The Tech Effect**

One of the most significant differences between older Americans and younger Americans is their adoption of new technologies and how they use them to their fullest potential. While older Americans are catching up to younger Americans in terms of embracing technology, the younger set is more likely to use all of a device's features.

For example, among those who own smartphones, both groups are equally likely to use apps from retailers to learn about sales and promotions. Gen Xers and Yers are only two percentage points more likely than Boomers and Seniors to have used a mobile device to order an item that was unavailable in store in the color or size they wanted. However, Gen

Xers and Yers are 20 percentage points more likely than Boomers and Seniors to have used their smartphone to look up items to compare prices at the retailer's store and website, and they are 20 points more likely to have compared prices at other retailers' websites. Younger generations are also 18 points more likely than their older counterparts to have used their mobile device to look up product reviews.

Mobile technology represents a particular area for retailers to expand their offerings to meet future demand. Mobile retail significantly lags behind online retail in 2010, but Kantar Retail predicts it will grow rapidly in the coming decade because of the ease and comfort young Americans have with mobile technology.

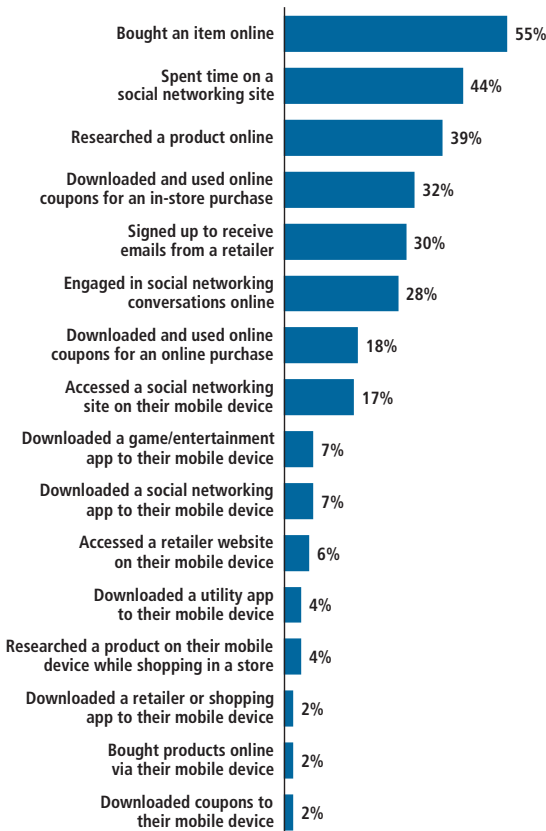
**SOURCE:** "Strategic Outlook Conference," Kantar Retail, Katherine Clarke, VP Marketing, Two Easton Oval, #500, Columbus, OH 43219; 614-355-4009; katherine.clarke@kantarretail.com; www.kantarretail.com. Price: Call for information.

**Americans Will Buy Anything Online... Including Groceries**

Some 15% of Americans have bought groceries online, including 17% of those who are the primary grocery shopper for their household, according to Burst Media. Of those who have not shopped for groceries online, 44% are considering doing so. As with many advanced technologies, young adults are early adopters: 18-24-year-old primary grocery shoppers (24%) are more likely than primary grocery shoppers aged 25 and older (16%) to use the Web to buy groceries.

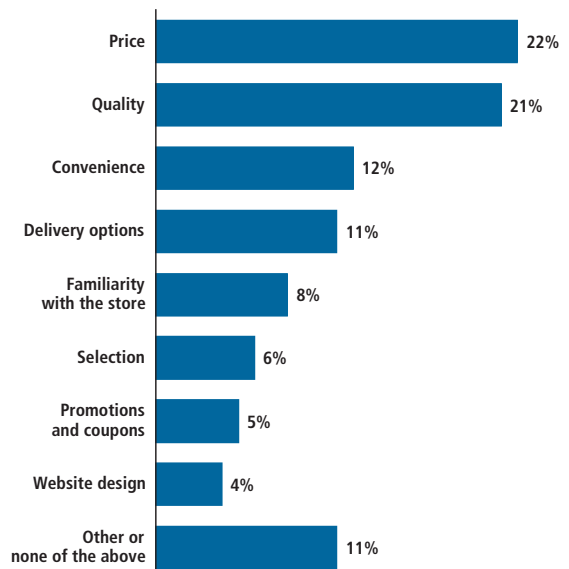
Considering that price comparisons are easily facilitated

**AMERICANS WHO HAVE ENGAGED IN RETAIL ACTIONS ONLINE AND VIA A MOBILE DEVICE, 2010**



**SOURCE:** Kantar Retail

**PRIMARY REASON SHOPPERS CHOOSE ONE ONLINE GROCERY OVER ANOTHER, 2010**



**SOURCE:** Burst Media

online, it is logical that consumers most commonly say price is the key factor in their choice of an online grocer.

**SOURCE:** "Everyone Has To Eat: Online Grocery Shopping And Couponing Habits," Burst Media, Chuck Moran, Director Marketing, 8 New England Executive Park, Burlington, MA 01803; 781-852-5291; cmoran@burstmedia.com; www.burstmedia.com.

## Smart Shopping With A Smartphone

More than a third of Americans with Web-enabled phones (35%) have used the device to shop online, up from 31% in 2009, finds Pricegrabber. Some 13% have made a purchase using their phone. One in eight have also used their phones to check product availability (13%) and to find sales and coupons (13%). Nearly a quarter (22%) have researched product details or specs from their phones, and 21% have checked or compared prices.

Digital content for their phone (65%) is the most common purchase shoppers make from their phone, they also buy physical items, including:

- ▶ Consumer electronics, excluding computers (57%);
- ▶ Books (42%);
- ▶ Clothing (34%);
- ▶ Computers, laptops, or related equipment (31%); and
- ▶ Jewelry and watches (16%).

**SOURCE:** "Smartphone Shopping Behavior," Pricegrabber; Sara Rodriguez, Market Research Analyst, 5150 Goldleaf Circle, 2nd Fl., Los Angeles, CA 90056; 323-601-1282; sara@pricegrabber.com; www.pricegrabber.com. Price: Available upon request at no charge.

## Black Spending Power Surges In 2008

Black consumers had a spending power of \$308 billion in 2008 — the most recent year for which data are available — up from \$744 billion in 2007, reports Target Market News.

Their spending on consumer electronics (up 32%), home computers (up 28%), and appliances (up 27%) suggests they were taking advantage of retailers' recessionary pricing tactics on big ticket items. Meanwhile, their decrease in spending on personal care items (down 10%) and alcoholic beverages (down 6%) may reflect how they saved money to afford other luxuries.

**BLACK SPENDING, BY CATEGORY, 2008**  
(In billions)

Apparel products and services	\$26.9
Appliances	\$2.2
Beverages (alcoholic)	\$2.8
Beverages (non-alcoholic)	\$3.1
Books	\$0.3
Cars and trucks (new and used)	\$31.5
Computers	\$3.5
Consumer electronics	\$4.5
Contributions to charities and churches	\$11.0
Education	\$71.0
Entertainment and leisure	\$2.8
Food	\$65.3
Gifts	\$3.5
Healthcare	\$23.9
Household furnishings and equipment	\$12.9
Housewares	\$836.0
Housing and related charges	\$166.3
Insurance	\$19.0
Media	\$8.3
Miscellaneous	\$4.4
Personal care products and services	\$6.6
Sports and recreational equipment	\$1.0
Telephone services	\$17.2
Tobacco products and smoking supplies	\$3.1
Toys, games, and pets	\$2.4
Travel, transportation, and lodging	\$6.4

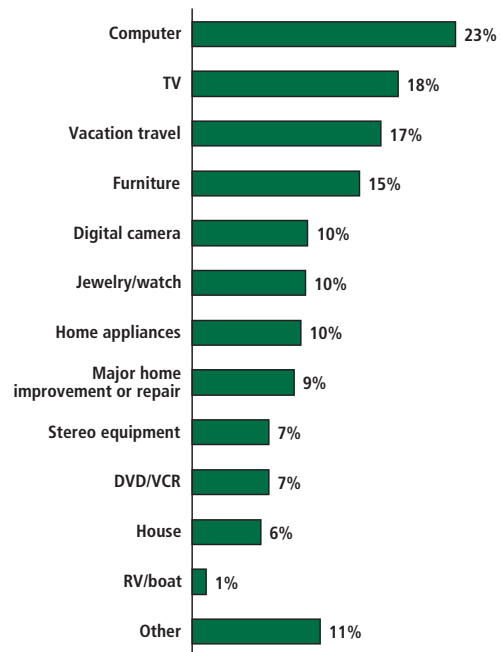
SOURCE: Target Market News

**SOURCE:** "The Buying Power Of Black America," Target Market News, Ken Smikle, President, 228 S. Wabash Ave., #210, Chicago, IL 60604; 312-408-1881; 312-408-1867; info@targetmarketnews.com; www.targetmarketnews.com. Price: \$99; local market editions also available for \$99 each.

## Hispanics' Financial Confidence Enables Big Ticket Purchases

Nearly half of Hispanic consumers (49%) believe that the economy will eventually rebound to what it was prior to the recession, compared to 41% of the general population, finds Televisa and BIGresearch. In addition, Hispanics (41%) are more likely than the general population (30%) to be confident that the economy will be strong in the coming six

**BIG TICKET ITEMS HISPANICS PLAN TO BUY IN THE COMING SIX MONTHS, 2010**



SOURCE: BIGresearch and Televisa

months (as of January 2010). Along with expectations for economic recovery, a greater proportion of Hispanics in January 2010 than in January 2008 believe there will be fewer layoffs in the coming six months.

While 56% of Hispanic consumers say they have become more practical and realistic about their purchases in the prior six months, that is a decrease from 62% in January 2009. Some 63% are focusing more on what they need rather than what they want, down from 66%. A slight majority (52%) has become more budget conscious, down from 55%.

Compared to 2009, fewer Hispanics are focused on paying down debt, decreasing their overall spending, increasing their savings, and refinancing their homes. Hispanics are also more likely than the general population to plan to purchase big ticket items in the coming six months.

**SOURCE:** "The Hispanic Consumer Outlook," BIGresearch and Televisa, Kim Rayburn, SVP Client Solutions and Marketing, 450 W. Wilson Bridge Rd., #370, Columbus, OH 43085; 614-846-0146; kim@bigresearch.com; www.bigresearch.com. Price: Call for information.

## Hispanics Are Optimistic About U.S. Economic Improvement

Hispanics (77%) are more likely than the U.S. population overall (66%) to believe the recession has ended and that the economy has stabilized, according to Ipsos and Telemundo. That includes 14% and 11% of each group, respectively, that believes the economy is improving. Two in 10

Hispanics (20%) think the worst is yet to come, compared to 31% of all Americans.

Hispanics living in the West are more likely than average believe the economy is improving (17%) and less likely than average to think it will get worse before it gets better (16%). Hispanic women (68%) are more likely than Hispanic men (58%) to think the economy has stabilized.

Perhaps because of the news coverage they view, Hispanics who prefer to watch TV in Spanish (17%) are more likely than those who prefer to watch in English (10%) to think the economy is improving.

**SOURCE:** "Hispanic Economic Outlook," Ipsos, Julio Franco, 1700 Broadway, 15th Fl., New York, NY 10019; 646-313-6117; julio.franco@ipsos.com; www.ipsos.com. Price: Available online at no charge.

### Hispanics Are Price Sensitive, But Many Are Also Brand Loyal

Fewer Hispanics (42% in 2010 vs. 50% in 2009) expect to maintain the same level of grocery shopping in the future compared to their current shopping levels, according to M/A/R/C Research. More than four in 10 (41%) expect to buy more in the future, compared to 42% in 2009, whereas 17% expect to buy less, up from 11%.

Among those who expect to buy more in the future, 16% will stick with private label brands, and 13% will buy more private labels. One in eight (12%) will switch to national brands.

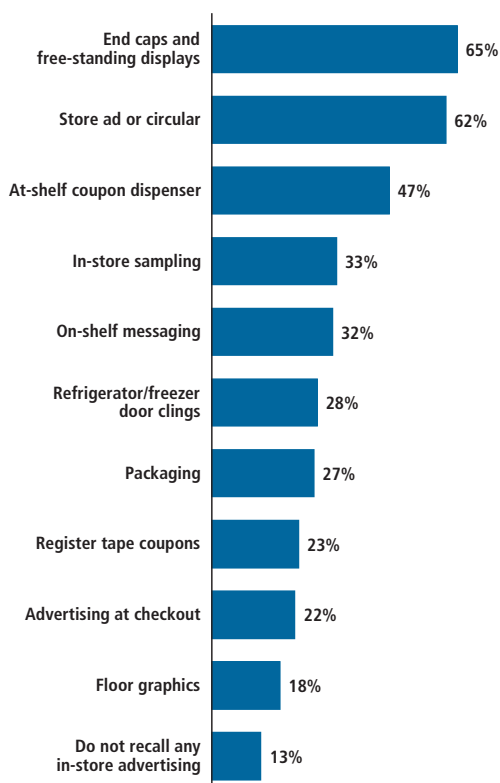
While price sensitivity and brand loyalty seem to be at odds for grocery shoppers, Hispanics exhibit both traits. Among those who have not reduced or changed their grocery shopping during the recession, 67% will stick to their preferred brand, even when presented with lower-cost options. Instead, they buy less or less often to save money, which may explain the slide they expect in their grocery shopping levels.

In order to save on their favorite brands, 46% of Hispanic shoppers use coupons, up from 42% at the start of 2009. A similar proportion (45%) use store discount cards, up from 39% over the same period.

Hispanics (87%) are as likely as non-Hispanics (86%) to have noticed some form of in-store advertising. They are more likely than non-Hispanics to notice end caps and free-standing displays (65% of Hispanics vs. 45% non-Hispanics) and at-shelf coupon dispensers (47% Hispanics vs. 39% non-Hispanics).

**SOURCE:** "The Checkout: Hispanic Shoppers," Issue 5.10, M/A/R/C Research, Merrill Dubrow, President, 1660 N. Westridge Cir., Irving, TX 75038; 972-983-0416; merrill.dubrow@marcresearch.com; www.marcresearch.com. Price: Call for information.

HISPANIC AWARENESS OF IN-STORE ADVERTISING METHODS, 2010



**SOURCE:** M/A/R/C Research

### Acculturation And Hispanic Shoppers

Acculturation levels affect Hispanic attitudes toward shopping, according to Redbean Society and New American Dimensions. Less acculturated shoppers prefer to make shopping decisions in the store (70%) and tend to buy items they were familiar with in their country of origin (60%). More acculturated shoppers are comfortable shopping online (79%) and buying on impulse (86%).

Country of origin can be a predictor of acculturation. Caribbean Hispanics (43%) are more likely than Hispanics from Mexico (31%) and from South and Central American (20%) to be highly acculturated. As a result, Caribbean Hispanics are most inclined to comparison shop (77%), budget prior to shopping (73%), and prepare a shopping list (90%).

**SOURCE:** "Latina Shopper Study, 2010," Redbean Society, Jackie Bird, 44 W. 28th St., 8th Fl., New York, NY 10001; 646-794-4132; jackie@redbeansociety.com; www.redbeansociety.com. Price: Call for information.

### Reaching Low-Income Shoppers, Including Blacks And Hispanics

Low-income shoppers are a growing segment of the U.S. population following the recession, which has exaggerated the income gap between the upper and lower classes. Low-income shoppers will account for \$115 billion in incremental spending in the coming decade, according to SymphonyIRI.

The key segments of low-income shoppers are Black and Hispanic households, young households headed by those aged 25-34, households with children, and older households headed by those over age 65.

Low-income Black households make the most shopping trips per year at 177, compared to 169 by older households and 168 by Hispanic households. Nearly half of low-income shoppers (49%) track their spending during their shopping trips and make budget decisions in the process, compared to 38% of higher-income shoppers.

Fewer than three in 10 low-income shoppers feel that national brands are worth the extra money. Black low-income shoppers (46%) are the most loyal to national brands and willing to spend extra for them. Low-income households with children (70%) are more likely than Black low-income households (60%) to say they will switch to another brand if it is cheaper.

Not surprisingly, 96% of low-income shoppers seek out and shop at stores that offer good value for the money. Hispanic low-income households (87%) are less likely than average to say so.

There are significant barriers to healthy eating for low-income households. Still, 76% of older low-income shoppers say healthy eating is important to them, compared to 65% of younger low-income shoppers. Older Americans are more likely to have health issues that require them to watch their diet.

Among older low-income shoppers, high fiber, whole grains, and weight management are key health attributes they seek in food shopping. Hispanic low-income shoppers focus on natural foods, "super" foods (which have functional or medicinal properties), and food enriched with protein. Black low-income shoppers (64%) are more likely than older shoppers overall (41%) to say that projecting the image of a healthy diet is important.

**SOURCE:** "Low-Income Shopper Report," SymphonyIRI, Thom Blischok, President Consulting & Innovation, 150 North Clinton St., Chicago, IL 60661; 312-474-2325; thom.blischok@infores.com; www.symphonyiri.com. Price: Call for information.

## Gamers Increasingly Patronize Alternative Media Sources For Entertainment Needs

Adults who spend at least a dollar a month on videogame-related entertainment spend a greater share of their monthly entertainment budget than adults overall on new media (such as video-on-demand and website subscriptions) and purchasing DVDs and CDs, according to Nielsen Games. They spend a smaller-than-average share on TV services premium channel packages.

MONTHLY SHARE OF ENTERTAINMENT BUDGET,  
ALL HOUSEHOLDS VS. VIDEOGAME BUYING HOUSEHOLDS, 2009

	ALL HOUSEHOLDS	VIDEOGAME BUYING HOUSEHOLDS
Activities such as dining out, shopping, or going to a museum	24.8%	20.4%
Regular TV packages (such as basic cable)	17.9%	13.0%
At-home non-media activities, such as hobbies	6.9%	7.7%
Attending live events (sports, concerts)	5.9%	6.3%
Seeing movies at a theater	5.4%	5.9%
Cell-phone related entertainment (excluding calling plan)	5.3%	5.3%
Videogame content (new and used games, downloads, rentals)	4.9%	9.3%
Buying or subscribing to magazines, books, newspapers	4.2%	3.4%
Premium TV packages (such as HBO)	4.1%	3.7%
Buying or renting feature films	3.5%	4.3%
Participating in personal wellness activities	3.4%	3.4%
Participating in sports activities	3.1%	4.1%
Buying CDs, MP3s, or other forms of music	2.8%	3.8%
Entertainment related options on the Internet (such as website subscriptions)	2.2%	2.7%
Satellite radio subscription	1.3%	1.5%
Buying Video-On-Demand or Pay-Per-View	1.2%	1.8%
Other	3.0%	3.4%

SOURCE: Nielsen Games

SOURCE: "Nielsen 360 Gaming Report: United States Market," Nielsen Games, Michael Flamborg, Account Executive, 6255 Sunset Blvd., Los Angeles, CA 90028; 323-817-1597; michael.flamborg@nielsen.com; www.nielsenmedia.com.

## The Discussion About Paid Content Should Be About Paid Access

Americans spend a significant amount of their media budget simply for access to content, according to Forrester. Their typical monthly media bill \$96.84 — and \$75.04 (or 77%) is for access to content. [Note: These totals are weighted based on the proportion of households using the services listed below.]

For content, they spend:

- ▶ \$5.58 to subscribe to magazines (72% of Americans do so);
- ▶ \$13.75 to subscribe to newspapers (57%);
- ▶ \$11.04 on CDs (23%);

- ▶ \$16.00 to watch a movie in a theater (21%);
- ▶ \$4.99 to rent DVDs (18%);
- ▶ \$12.00 to buy DVDs (18%); and
- ▶ \$4.99 for video-on-demand (7%).

For access to content, they spend:

- ▶ \$56.00 for pay TV services (86% of Americans do so);
- ▶ \$26.00 for Internet access (76%);
- ▶ \$3.37 to download music (19%);
- ▶ \$30.00 for a wireless data plan on their cell phone (19%);
- ▶ \$9.99 to subscribe to Netflix (10%); and
- ▶ \$6.99 to subscribe to a gaming service (6%).

Even if one argues against how Forrester categorizes spending — that downloading music belongs in the “content” category or that renting DVDs belongs in the “access” category — it is clear that the majority of consumer spending on media is for access to content rather than for ownership.

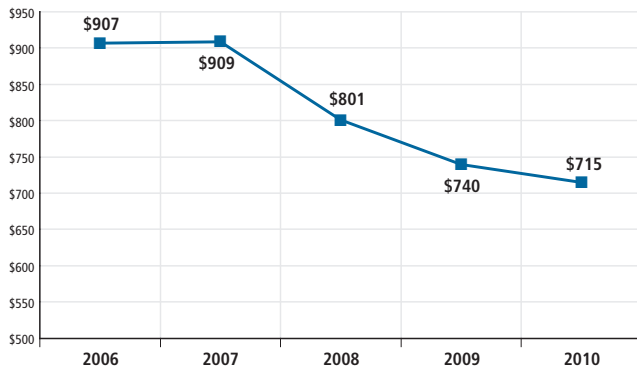
SOURCE: “Consumer Technographics Survey,” Forrester, James McQuivey, Analyst, 400 Technology Sq., Cambridge, MA 02139; 617-613-6000; jmcquivey@forrester.com; www.forrester.com. Price: Call for information.



## Holiday Spending Continues To Slide In 2010

Consumers expect to spend \$715 on gifts for Christmas and Hanukkah, according to Gallup Poll. Slightly more than a quarter (27%) say they will spend less than they did a year ago, compared to 11% who say they plan to spend more.

AMOUNT CONSUMERS EXPECT TO SPEND ON GIFTS FOR CHRISTMAS AND HANUKKAH, 2010



SOURCE: Gallup Poll

SOURCE: "Consumers Issue A Cautious Christmas Spending Forecast," Gallup Poll, Lydia Saad, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.galluppoll.com.

## Moms Expect To Spend \$150 On Each Kid This Holiday Season

Half of moms (50%) plan to spend more than \$150 on gifts for a child, trying to get each child an equal number of presents, according to BSM Media. Four in 10 moms (40%) intend to do at least half of their shopping online, with another 25% expecting to purchase three-fourths of their gifts online.

Eight in 10 (80%) search for a coupon code before making an online purchase. Their top destinations include Amazon.com, Target.com, Walmart.com, Overstocked.com, and SmartBargains.com.

Nearly all moms (98%) look to other moms for gift ideas and advice, with 93% also seeking ideas from mommy bloggers, 83% looking to websites, 69% Facebook, and 61% Twitter (among users of Facebook and Twitter). In fact, 70% of Twitter-using moms have purchased a product mentioned on Twitter.

While moms consult with a variety of sources for gift ideas, they primarily turn to websites (71%) and blogs (62%) to find the "perfect" gift.

SOURCE: BSM Media, Maria Bailey, Co-Founder, 2335 E. Atlantic Blvd., #300, Pompano Beach, FL 33062; 954-943-2322, x2; maria@bsmmmedia.com; www.bsmmmedia.com.

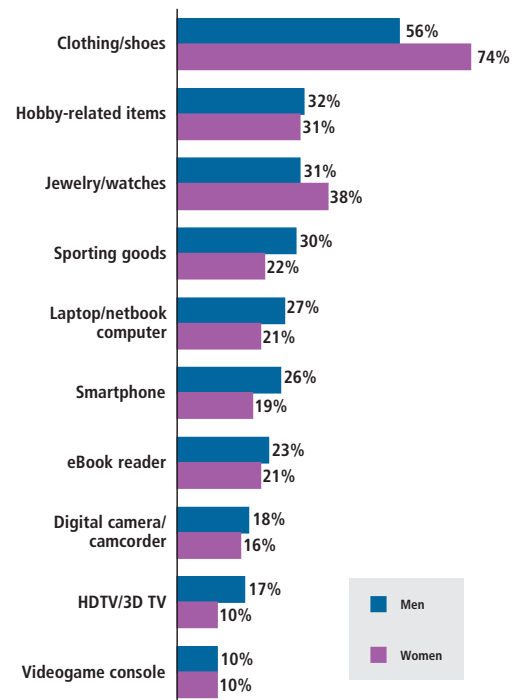
## Men & Women Have Different Reasons To Adjust Holiday Spending

Nearly half of consumers (48%) plan to spend less on Christmas and Hanukkah gifts in 2010 than they did in 2009, according to Pricegrabber. Men (44%) are less likely than women (54%) to say they will cut back. Their reasons for spending less differ:

- ▶ 51% of men do not have confidence in the economy, compared to 38% of women.
- ▶ 50% of men report making less money this year than last, compared to 46% of women.
- ▶ 48% of women say the increase in the price of necessities forces them to spend their money differently, compared to 39% of men.

The ways in which they budget for purchases also varies. Women (65%) are more likely than men (49%) to plan to spread out their shopping over a longer period in order to absorb their spending into their monthly budgets. Men (73%) are more likely than women (64%) to plan to use credit cards for their holiday shopping.

WHAT MEN AND WOMEN PLAN TO BUY DURING THEIR HOLIDAY SHOPPING TRIPS, 2010



SOURCE: Pricegrabber

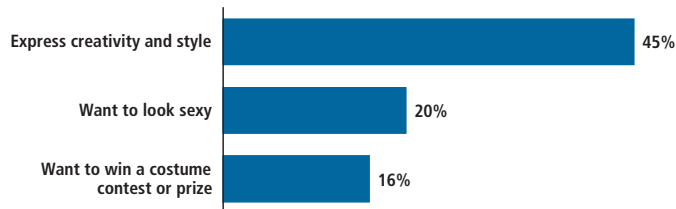
SOURCE: "Holiday Consumer Spending Insights," Pricegrabber, Sara Rodriguez, Market Research Analyst, 5150 Goldleaf Circle, 2nd Fl., Los Angeles, CA 90056; 323-601-1282; sara@pricegrabber.com; www.pricegrabber.com. Price: Available upon request at no charge.

## Revelers Stress Over Perfect Costumes

More than eight in 10 people who dress up for Halloween (81%) aren't able to create the costume they envision due to lack of money or time, finds Savers, a chain of secondhand stores. Nearly four in 10 (39%) get stressed out about creating the perfect costume.

A third of Americans (34%) spend less than \$25 on their costumes, 32% spend between \$25 and \$50, and the remaining 34% spend more than \$50. Most people (91%) would wear a costume again or wear parts of a costume, with the majority doing so to save money (61%), compared to 39% who do so to save time.

### REASONS AMERICANS DRESS IN COSTUME FOR HALLOWEEN, 2010



SOURCE: Savers

SOURCE: "Halloween Shopping Survey," Savers, Sara Gaugl, 11400 SE 6th St., #220, Bellevue, WA 98004425-456-1706; sgaugl@savers.com, www.savers.com.

## New Research Discovers Attitudes Of The Post-Recession Consumer

A new consumer has emerged from the recession of 2008-2009, according to Ogilvy & Mather. While he was once “passive, careless, and simple,” he is now “active, determined, and complex.”

Consumers are taking the weight of the economy on their own shoulders, perhaps because they believe the public as a whole will fail to do so:

- ▶ 21% plan to go back to spending the way they did before the recession, compared to 62% who believe the general public will do so.
- ▶ 17% admit they personally over-consumed and need to curb their spending habits, compared to 84% who think the public over-consumed and needs to make changes.
- ▶ 17% say the recession was a positive “wake-up call” for them personally, and 36% think it has been positive for the public.
- ▶ 40% say their personal financial stress is high, compared to 67% who believe the general public feels the same way.

Though only 12% blame consumers for the recession (and 45% blame the government), 56% believe that consumers making changes is the best way to get the country out of its financial mess (compared to 33% who think the government is most capable of doing so).

The majority of consumers would rather have fewer high-

quality items (73%) than several lesser-quality items (27%). But their specific shopping habits do not reflect this opinion: 92% are using coupons, 91% are shopping more at cheaper/discount stores, and 90% are buying more store brand products. Yet, 60% of women have bought something on a whim in the prior year, and 39% have made an impulse buy in the prior month.

Americans’ attitudes toward money and careers have changed as well:

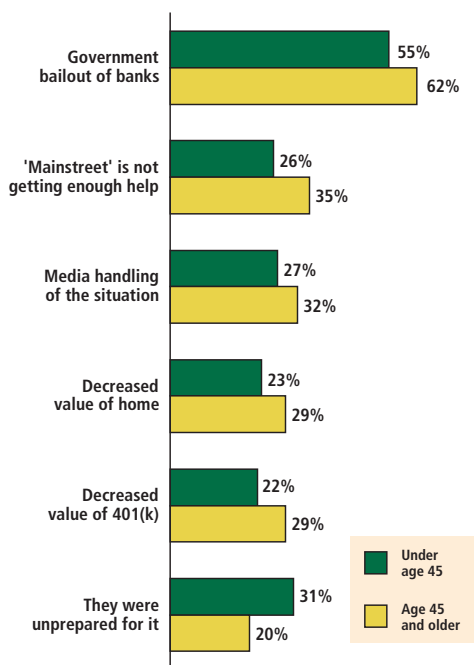
- ▶ 75% would rather have a secure job that has fewer opportunities for raises than a less secure job with consistent raises.
- ▶ 75% would rather get out of the “rat race” than climb a corporate ladder.
- ▶ 76% would rather spend more time with family than have more money.
- ▶ 91% would rather marry a nice person who is poor than a jerk who is rich.

**SOURCE:** “Eyes Wide Open, Wallet Half Shut,” Ogilvy & Mather, Graceann Bennett, Managing Partner & Director Strategic Planning, 350 West Mart Center Dr., #1150, Chicago, IL 60654; 312-527-3900; graceann.bennett@ogilvy.com; www.ogilvy.com. Price: Available upon request.

## All Shoppers Strive To Be Resourceful In Recessionary Times

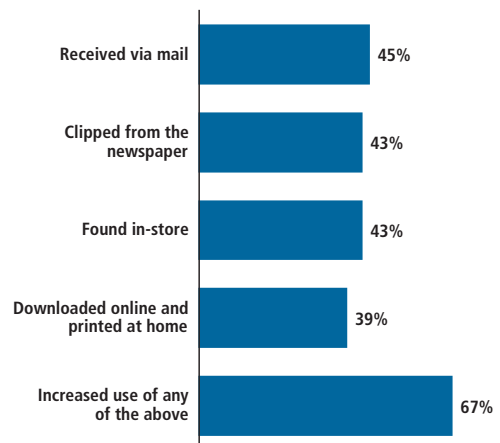
More than nine in 10 consumers (92%) have made changes in their pantry-related shopping habits, according to Deloitte and Harrison Group. Even a majority of those who have not had a reduction in income (55%) have made cutbacks simply because they felt they should. The vast majority (89%) believe they have become more resourceful during the recession. Shoppers seem to be enjoying their newfound thriftiness, with 81% saying it is fun to see how much they can save with coupons and loyalty cards.

WHAT UPSETS AMERICANS MOST ABOUT THE RECESSION, UNDER AGE 45 VS. AGE 45 AND OLDER, 2010



SOURCE: Ogilvy

TYPES OF COUPONS SHOPPERS ARE USING MORE OFTEN DURING THE RECESSION, 2010



SOURCE: Deloitte and Harrison Group

The new shopping mentality has yielded new types of consumers. They are:

- ▶ **Spectators (38%).** This is the youngest and most educated segment. The least likely to have been personally affected by the recession, they are also the least likely to have made changes to their shopping habits. However, they wish to be resourceful.
- ▶ **Sacrificers (22%).** They have the lowest incomes and have been the most affected by the recession. They are resentful and bitter about the changes they have been forced to make during the prior two years of recession. They are proud of their resourcefulness — and were likely resourceful shoppers prior to the recession — but are frustrated with the cutbacks they have had to make in both spending and quality.
- ▶ **Planners (21%).** They are the least likely to have children at home, yet they are most likely to buy in bulk to make their money go further. Their savings strategy revolves around product mix rather than coupons and discounts.
- ▶ **Super Savers (21%).** They are predominantly female and take great pride in their thriftiness by any means.

**SOURCE:** "The 2010 American Pantry Study," Deloitte, Pat Conroy, Vice Chairman and Consumer Products Practice Leader, 127 Public Sq., Cleveland, OH 44114; 216-830-6602; pconroy@deloitte.com; www.deloitte.com. Price: Call for information.

## Generation By Generation: Unique Attitudes In The Wake Of The Recession Lead To Unique Shopping Habits

While traditions are passed down from generation to generation, each has a distinct attitude all its own. Members of each generation share similar outlooks on life, similar style, and similar shopping habits.

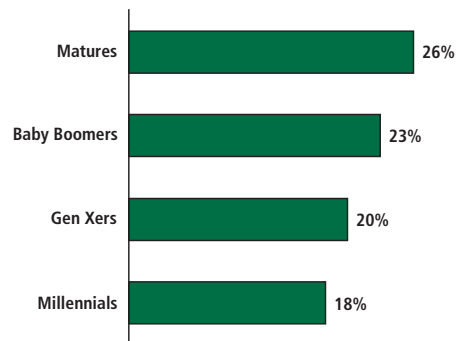
Matures were born prior to 1945. Baby Boomers were born between 1946 and 1964. Researchers do not entirely agree on the boundaries for Gen Xers and Millennials, but for the research that follows, Gen Xers are those born between 1965 and 1976, and Millennials fall in the years between 1977 and 1994.

The recession has affected each generation differently, according to Sachs Insights.

**Baby Boomers** do not have the financial security they worked for and were expecting at this stage of their lives, thanks to the recession. Between assisting their struggling offspring and providing for aging parents, they're feeling squeezed. They are cautiously optimistic for a turn around in the country's economic situation and are making do until then.

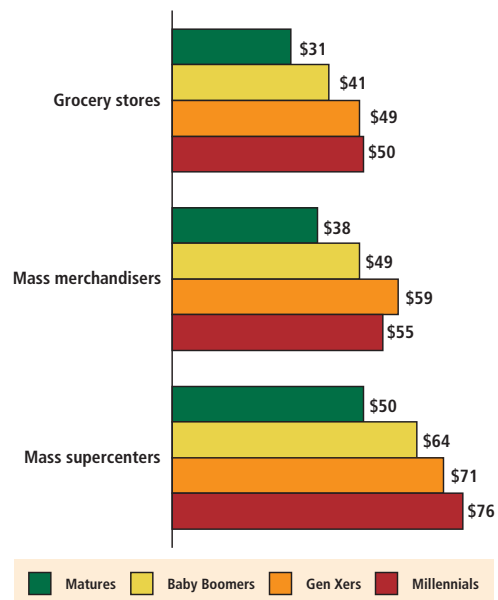
Boomers are struggling with employment issues. Those who have lost their jobs are finding opportunities few and far between for their age group. Some older Boomers are looking forward to the steady income Social Security will

SHARE OF DOLLARS SPENT ON PRODUCTS ON SALE, BY GENERATION, 2009



SOURCE: Nielsen

AMOUNT SPENT PER TRIP TO GROCERY STORES, MASS MERCHANDISERS, AND MASS SUPERSTORES, BY GENERATION, 2009



SOURCE: Nielsen

provide. Those who are working regard the younger generation as a threat to their job security.

**Gen Xers** came of age in the recession of the '90s and feel a personal responsibility to remain positive despite the difficult times. They are working on building their lives and families, but the cost of doing so does not allow them to save much, if anything. They have very low expectations for retirement, and many believe they will work in some capacity for the rest of their lives.

Xers are hoping for an opportunity to make up for the setbacks they have experienced during the recession.

**Millennials** are products of the digital age, and have always known that the world can change in an instant. As a result, they have become adaptable, flexible, and resilient. They maintain the same goals — career, home, children —

but their dreams are on hold and they are uncertain about when they may realize their goals.

Millennials were considered an entitled generation, but in the wake of the recession, many have learned they cannot count on their parents to bail them out of situations. They are learning to manage their own finances and how to plan for the future. In the meantime, they rely on their friends for support.

All generations have been affected by the recession. Excessive spending in the past is widely acknowledged, as is the value of saving both as a means of having an emergency financial cushion, but also to cope with fear of what the future may bring.

While they used to pay a little extra for a product or service if it would save them time, they are now spending more time in order to plan and track down the best deals. Their deal-seeking behavior has diminished their store loyalty.

### Shopping Among Generations

Matures are influenced by frugal lifestyles developed during the Great Depression and World War II. They are deal-seekers and make frequent shopping trips (about 190 a year), but spend the least per trip (\$35). Millennials, on the other end of the spectrum, do not want to waste time in stores, so they make the fewest number of trips (about 140), and spend the most per trip (\$55).

Gen Xers spend nearly as much as Millennials per trip (\$54), but they make more shopping trips (about 155). Their higher rate of spending reflects their shopping for larger households that include children.

Although Baby Boomers are increasingly becoming empty nesters, they are used to frequent shopping trips, and continue to make about 180 trips per year, but spending less than Xers per trip (\$46).

The amount each generation spends annually on certain grocery categories reflects their life stages as well. Millennials and Gen Xers spend a significant amount on baby food (\$170 and \$127, respectively) and carbonated beverages (\$116 and \$134, respectively). Baby Boomers and Matures spend the most on pet food (\$211 and \$198, respectively) and wine (\$125 and \$124, respectively).

ANNUAL SPENDING ON SELECTED GROCERY CATEGORIES, BY GENERATION, 2009

	MATURES	BABY BOOMERS	GEN XERS	MILLENNIALS
Baby food	\$34	\$58	\$127	\$170
Carbonated beverages	\$97	\$40	\$134	\$116
Cereal	\$65	\$76	\$92	\$87
Detergents	\$46	\$56	\$59	\$49
Haircare	\$28	\$40	\$45	\$36
Ice cream	\$41	\$39	\$34	\$28
Pet food	\$198	\$211	\$148	\$112
Vitamins	\$107	\$85	\$58	\$52
Wine	\$124	\$125	\$78	\$61

SOURCE: Nielsen

**SOURCES:** "3 Generations: Aspirations & Hard Choices In The New Economy," Sachs Insights, Robert Miner, President, 200 Varick St., #500, New York, NY 10014; 888-924-4888, x105; rminer@sachsinsights.com; www.sachsinsights.com. Price: Call for information.

"Nielsen Homescan," Nielsen Company, Todd Hale, SVP Consumer & Shopping Insights, 770 Broadway, New York, NY 10003-9595; 646-654-5000; www.nielsen.com. Price: Call for information.

## Back-To-School Spending Suffers Recession Rollback

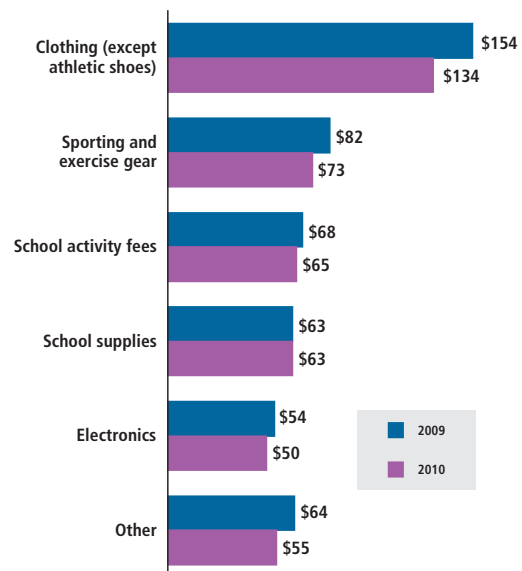
The vast majority of mothers of school aged children are happy their progeny are going back to school at the end of the summer, including 80% of moms of 7-12 year olds and 77% of moms of 13-17 year olds, according to Marketing to Moms Coalition.

That's not to say they are just passing their children off into the care of others; about a quarter expect to be more involved in their children's schools than in years prior, and only 7% expect to be less involved. Spanish speaking moms (33%) are more likely than average to say they will be more involved.

Moms of 7-12 year olds expect to spend \$440 on back-to-school needs, down from \$487 in 2009. The most significant cuts will be enforced in the clothing category (\$134, down 13%) and sporting and exercise gear (\$73, down 11%). Spending on activity fees, school supplies, and electronics are relatively flat.

Moms will do the majority of back-to-school shopping in brick and mortar stores, which will account for 81% of their spending. This is consistent with the prior two years.

SPENDING ON BACK-TO-SCHOOL NEEDS BY MOMS OF 7-12 YEAR OLDS, 2009 (ACTUAL) VS 2010 (PROJECTED)



SOURCE: Marketing To Moms Coalition

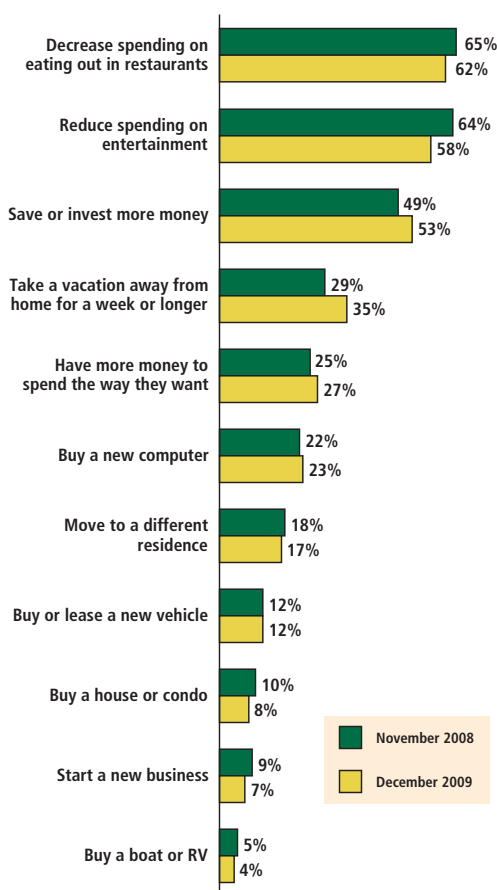
**SOURCE:** "Back To School 2010," Marketing To Moms Coalition, Michal Clements, Managing Partner, 1007 Church St., Evanston, IL 60201; 847-475-4200; michal@itoaction.com; www.marketingtomomscoalition.com. Price: Call for information.

## Is The Recession Over? Consumer Spending Rebounds Slightly

Consumers may believe media reports that the recession is over because several spending indicators are improving, according to Harris Interactive.

Compared to December 2009, a greater proportion were planning to take a long vacation within the coming six months in December 2009. The proportion with money to spend the way they want is also up slightly, while the proportion planning to save is decreasing. A majority still plans to spend less on entertainment and eating at restaurants, but both proportions are declining.

**CONSUMER SPENDING INTENTIONS FOR THE NEXT SIX MONTHS, NOVEMBER 2008 VS. DECEMBER 2009**



**SOURCE:** Harris Interactive

**SOURCE:** "More Green Shoots? Americans Slightly More Likely To Spend Money," Harris Interactive, Tracey McNerney, 60 Corporate Woods, Rochester, NY 14623; 585-214-7756; tmcnerney@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

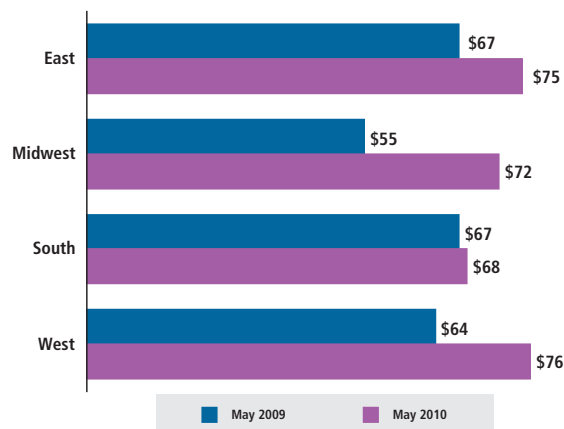
## For Some, Recession Spending Is Over

Average daily spending by affluent Americans — defined as those with an annual household income of \$90,000 or more — rose to \$145 in May 2010, up 33% compared to May 2009, according to Gallup Poll. Daily spending has been essentially flat since January 2009 among those with annual incomes of less than \$90,000, measuring \$59 in May 2009 and May 2010.

Whether the increase in spending by affluent Americans is a short-term spell of "frugal fatigue" or if it is a sign that they are more confident in the long-term health of the economy is yet uncertain.

Regionally, the Midwest posted the strongest rebound, with average daily consumer spending up 31% between May 2009 and May 2010. Spending was up 19% in the West, and 12% in the East. Spending in the South was nearly flat over the year.

**CONSUMERS' AVERAGE DAILY SPENDING, BY REGION, MAY 2009 VS. MAY 2010**



**SOURCE:** Gallup Poll

**SOURCE:** "Frugality Fatigue: Upper-Income Spending Surges," Gallup Poll, Dennis Jacobo, Chief Economist, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.galluppoll.com.

## Shoppers Continue To Adapt Behaviors As Recession Wears On

Nearly nine in 10 Americans (89%) have made changes to their lifestyles, including their food shopping patterns, to deal with the recession. However, the proportion who have made drastic changes declined to 28% in April 2010, com-

pared to 35% who said so in the third quarter of 2009, according to Digital Research and Think Vine.

Dollar stores and mass merchandisers continue to be the post-recession winners as shoppers seek to save more, with 36% and 33% of shoppers, respectively, visiting those types of stores more often in 2010 than 2009. Meanwhile, they are visiting supermarkets (27%), drug stores (29%), and convenience stores (34%) less often.

Those who are shopping supermarkets less often are shopping more at dollar stores (49%), mass merchandisers (32%), and warehouse clubs (21%), while making cuts at nearly all other types of stores.

Those who are shopping more at supermarkets are also shopping more at dollar stores (64%) and mass merchandisers (70%), though that may be because they did not shop there at all prior to the recession. This same group is cutting back their shopping at upscale department stores and convenience stores, while shopping online, at flea markets, and at farmers markets more often.

Only 1% of shoppers believe they will return to their pre-recession spending habits. Most (52%) will continue to use their saving strategies, and 43% expect their spending to increase somewhat but to be more conservative than before. Their most common saving strategies are to cut back on non-essential items (55%), to stock up on sale items (55%), and to use more coupons (53%). They are more likely in April 2010 than in the third quarter of 2009 to take advantage of rewards card programs at retailers (43%, up from 36%), while fewer are trading down to lower-priced national brands (30%, down from 36%). They are also less willing to sacrifice on quality, buying cheaper cuts of meat (16%, down from 24%), and less willing to forego healthy foods by buying less fruit and vegetables (11%, down from 16%).

**TYPES OF GROCERY ITEMS FOR WHICH SHOPPERS HAVE CHANGED THEIR HABITS WHEN PURCHASING, 2010**

Paper towels	.61%
Cookies	.60%
Ready-to-eat cereal	.60%
Over-the-counter pharmaceuticals	.59%
Juice beverages	.59%
Crackers	.57%
Salty snacks	.55%
Laundry detergent	.55%
Pasta sauce	.55%
Orange juice	.55%
Yogurt	.54%
Salad dressing	.52%
Bread	.52%
Carbonated soft drinks/soda	.50%
Coffee	.50%

NOTE: Changed habits include purchasing their preferred brand only on sale or with a coupon, buying a different size of their preferred brand, buying a less-expensive national or store brand, or buying at a less expensive store.

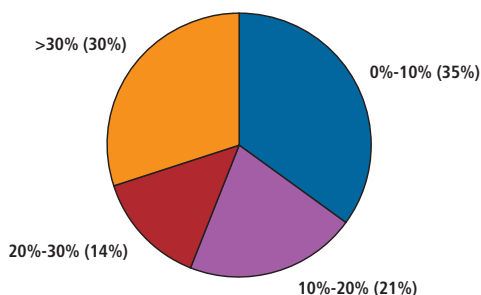
SOURCE: Digital Research and Think Vine

SOURCE: "Grocery Shopper Behavior, Q1 2010," Digital Research, Jane Mount, EVP, 201 Lafayette Center, Kennebunk, ME 04043; 207-985-7660, x121; jane.mount@digitalresearch.com; www.digitalresearch.com. Price: Call for information.

## Teen Spending Habits, Likes And Dislikes

Teens primarily get their money from parents (42%) and through a job (38%), according to Buzz Marketing. One in seven (14%) get an allowance and 6% receive money as gifts. The majority (85%) say the economy has affected their spending habits with another 78% now thinking before they spend money. Half only buy when they “need” something, 43% buy when they “want,” and 33% when it’s on sale. Also, the largest number (39%) shop only when necessary, though 35% shop weekly. Only 4% shop daily. More than eight in 10 (84%) regularly shop online. However, 53% believe they will resume their old spending habits as soon as the economy recovers.

AMOUNT OF TEEN INCOME THAT IS DISPOSABLE, 2010



SOURCE: Buzz Marketing

WHAT TEENS HAVE CUT BACK ON IN LIGHT OF THE RECESSION, 2010

1. Clothing
2. Dining out
3. Shoes
4. Electronics
5. Movies
6. Music
7. Car
8. Vacations
9. Make-up/beauty supplies
10. Coffee shops

SOURCE: Buzz Marketing

**News Info.** Teens overwhelmingly turn to online websites to learn about current events (73%). One in six (15%) get their news from TV, 7% from friends, and 5% from magazines, newspapers, or the radio.

**Technology.** Nearly all own a cellphone (98%), 87% have an iPod, 80% own a laptop and 89% own a digital camera. More than half have the most up-to-date versions. However, 62% say they will not be buying an iPad.

**Teen Music Tastes.** Since 2008, hip-hop and R&B have declined 10% in popularity, while interest in rock has increased 10%. Currently 29% of teens prefer listening to hip-hop, 28% rock, 17% pop, 10% R&B, and 4% alternative/indie music. Teens aren’t illegally downloading as much anymore. 99% did so in 2002, 26% did so in 2009.

**Hot or not.** Three in four teens (78%) think the Twilight franchise is still popular.

- ▶ Boys prefer blogs over magazines (63% vs. 37%), whereas girls prefer magazines over blogs (55% vs. 45%).
- ▶ Teens overwhelmingly prefer the Internet over the TV (86% vs. 14%).
- ▶ Girls prefer texting over instant messaging (56% vs. 44%), boys prefer IM (57% vs. 43%).
- ▶ Girls prefer to shop in the store (56%), while boys prefer to shop online (64%)

### WAYS TEENS ACCESS NEW SONGS

Download from iTunes .....	34%
Listen on websites such as Pandora, MySpace .....	23%
Download from niche website .....	21%
Buy CD in store .....	13%
Download from friend.....	9%

NOTE: More than one response permitted

SOURCE: Buzz Marketing

SOURCE: Buzz Marketing, Tina Wells, CEO, 1018 Laurel Oak Rd., #1, Voorhees, NJ 08043, 856-346-3456; tina@buzzmg.com; www.buzzmg.com.

## Profiles Of Teen Fashion Spending

The amount teens spend annually on clothing and accessories dropped to \$932 in spring 2010 from \$1,083 in fall 2009, according to Piper Jaffray’s bi-annual “Taking Stock of Teens” study. Specialty stores (29%) are the top place teens purchase such merchandise; those who shop online jumped to 10% from 6% in 2007.

Some 8% of a teen’s budget is spent on videogames, and the study finds a growing interest in non-traditional gaming platforms. More than half of teens (53%) will pay for downloadable console content, 38% will play for mobile games, and 25% play games through social network sites. Notably, fewer teens in spring 2010 listen to music via their cell phone than those in fall 2009 (34% vs. 40%).

It appears MP3 players have reached a level of saturation. Some 86% of teens currently own one, down from 92% in spring 2009. Although the vast majority of teens (92%) own some variation of an iPod, those who expect their next player to be a Sandisk jumped to 9% in spring 2010, compared to zero percent in 2009.

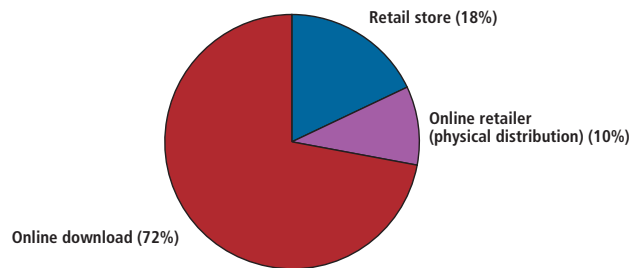
The number of teens who download music online has leveled off at 82% in spring 2010, the same percentage as last year. Most teens (57%) use free P2P music sharing networks rather than purchase tracks from an online music store. Teens who would consider paying \$.99 per track to listen music dropped significantly to 11% in spring 2010 from 20% in fall 2009. They also are less likely to pay \$15 a month for an online music subscription in spring 2010 (34%) than a year prior (46%).

Apple’s iPhone continues to grow in popularity among



teens. Some 14% of students currently own one, with an additional 31% expecting to purchase one within six months.

HOW TEENS ACQUIRE MUSIC, SPRING 2010



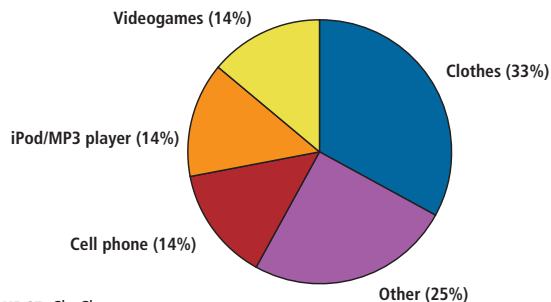
SOURCE: Piper Jaffray

SOURCE: "Taking Stock of Teens," Piper Jaffray, Jeffrey Klinefelter, Senior Research Analyst, 800 Nicollett Mall, Minneapolis, MN 55402; 612-303-5537; jeffrey.p.klinefelter@pjc.com; www.piperjaffray.com.

## Teens Splurge On Clothes With \$500 Windfall

The largest number of teens would go on a clothing shopping spree if they were given \$500 cash, according to the Cha Cha answering service; 14% would spend it on videogames, MP3 players, or cellphones.

WHAT TEENS WOULD BUY IF THEY WERE GIVEN \$500 CASH, 2010



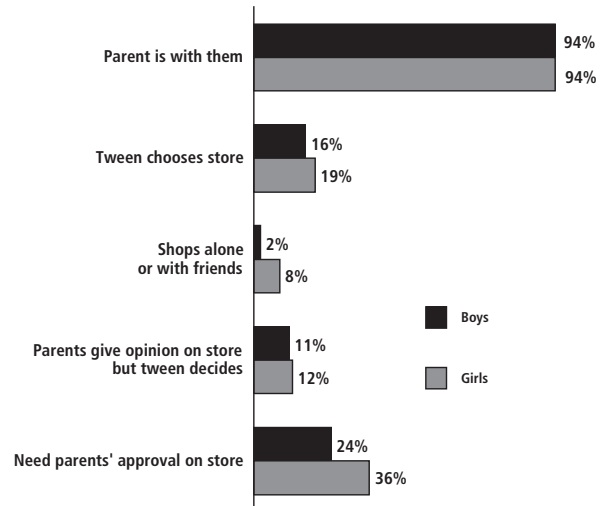
SOURCE: ChaCha

SOURCE: ChaCha, Steven Goldstein, Chief Revenue Officer, 575 Broadway, 5th Fl., New York, NY 10012; 917-991-4334; steven.goldstein@chacha.com; www.chacha.com

## When Shopping With Offspring, Parents Keep Tight Rein On Girls' Apparel Choices

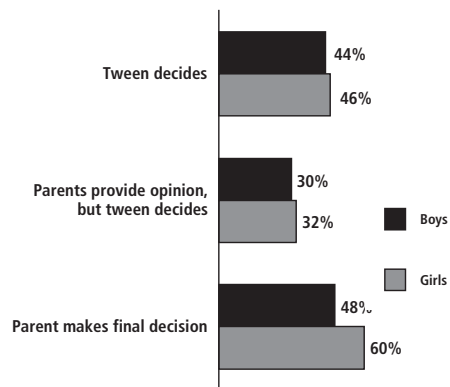
Nearly all tweens aged 8-12 (94%) have a parent with them when they shop for clothes, says the NPD Group. Parents tend to be more lenient with their sons than daughters in deciding where they shop and what they buy. More than one in three girls (36%) need to get their parents' agreement on where they buy clothes compared to 24% of their boy counterparts. Similarly, 60% of girls and 48% of boys say their parents must approve the clothing they purchase.

HOW TWEENS SHOP FOR CLOTHES, BY GENDER



SOURCE: NPD Group

KEY DECISION-MAKER IN TWEEN CLOTHING BUYS



SOURCE: NPD Group

SOURCE: NPD Group, Marshal Cohen, Chief Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-0700; marshal\_cohen@npd.com; www.npd.com.

## Kids Request And Receive Products Half Of The Time

Half of kid-specific purchases (49%) made in July were items expressively requested by the child, according to NPD Group. Children are most likely to chime in on music, sporting goods, and videogames. Girls, more specifically, request apparel and books, while boys ask for sporting goods and videogames.

Two-thirds of the dollars spent on kids comes from their parents, with grandparents accounting for 19%, particularly for baby products, gift cards, and toys.

The top child brands, based on dollar sales, for July were Carters, Disney, Nike, Nintendo, and Sony. Nearly a third (28%) of kid-specific purchases were of licensed goods. Chil-

dren 3-5 are more likely to acquire licensed goods, with 42% of all dollars spent on that age group going to licensed products.

**SOURCE:** NPD Group, Anita Frazier, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita\_frazier@npd.com; www.npd.com.

## Internet Exerts Most Influence Over Teen, Young Adult Purchasing Habits

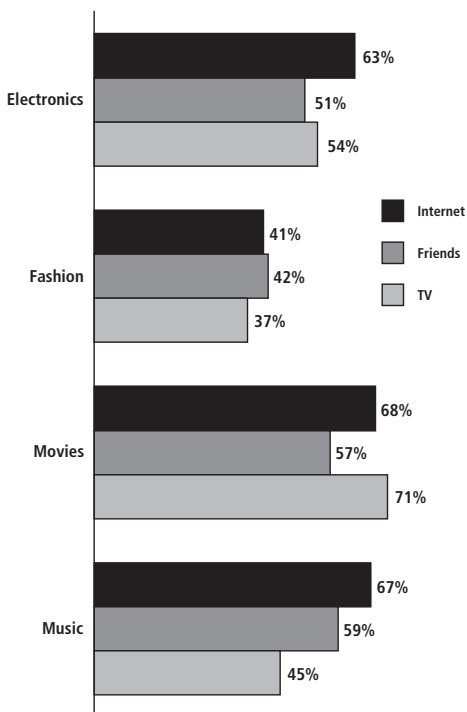
Teens and young adults spend an average \$2200 per year — from a combination of their own and their parents' money — on expenses including cellphones (\$864), fashion purchases (\$624), videogames (\$276), electronics (\$240), and movies (\$216), according to AOL and OTX.

They spend an average \$72 month on their cellphones, though 80% of teens aged 14-17 get help from their parents paying for it. More than half of young adults aged 18-24 (51%) are entirely responsible for their phone bills.

The Internet is the most frequently cited source of how teens learn about new products in electronics, fashion, and music. However, they are slightly more likely to learn about new movies through the television.

Nearly nine in 10 girls aged 14-24 (88%) are interested in fashion, compared to 61% of their male counterparts. Three in four girls (77%) prefer to shop in stores, however, 41% also shop online.

HOW 14-24-YEAR-OLDS DISCOVER NEW THINGS, BY CATEGORY



**SOURCE:** AOL, OTX

**SOURCES:** "Three Screen Nation: AOL Teen Study," AOL, Kurt Patat, Senior Communications Manager, 770 Broadway, 5th Fl., New York, NY 10003; 212-652-6323; kurt.patat@corp.aol.com; www.aol.com.

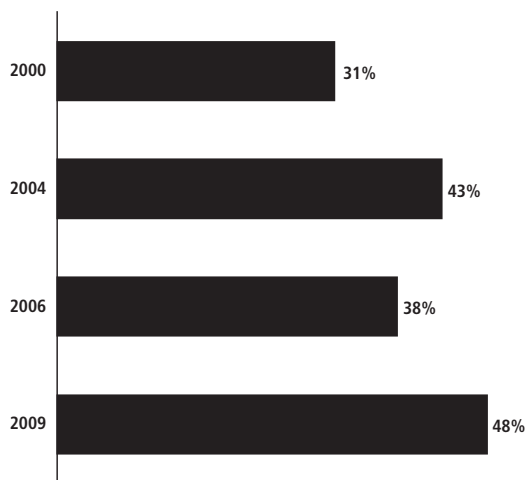
OTX, Nick Williams, Director Media & Entertainment Insights, 10567 Jefferson Blvd., Culver City, CA 90232; 310-736-3388; nwilliams@otxresearch.com.

## Teen Online Purchase Behaviors

Nearly half of teen Internet users (48%) regularly purchase products such as music, books, and clothing online, up from 31% in 2000, according to the Pew Internet & American Life Project.

Teens age 14-17 are more likely than those age 12-13 to have made an online purchase (53% vs. 38%). Girls aged 14-17 are also more likely than their boy counterparts to buy things online (57% vs. 48%).

TEENS WHO PURCHASE PRODUCTS ONLINE, BY YEAR



**SOURCE:** Pew Internet & American Life Project

**SOURCE:** Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

## Kids Still Rely On Digital Media For Entertainment

For every dollar that kids spend on entertainment media, 85 cents go toward physical products, with the balance going to digital content, according to the NPD Group. More than three quarters of kids ages 2-14 (79%) have acquired some form of physical or digital content in the past year, with 31% acquiring both. Kids generally use digital media to supplement their physical collections, says NPD, which adds that less than 1% of kids acquired only digital content in the past year.

Video rental services and online music services were the top content-based household services or subscriptions used by kids ages 2-14 in the past year. Some 19% of kids used an

in-store video rental service, 12% used an online video rental service, and 14% used an online music service.

**SOURCE:** NPD Group, Anita Frazier, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita\_frazier@npd.com; www.npd.com.

## **Tween Girls Wield Most Influence Over Family Restaurants, Food Purchases**

Tweens girls wield more influence over where their family dines out than they do over their own clothing purchases, according to AllyKatz. They also influence grocery purchases and where the family vacations.

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### **WHAT TWEEN GIRLS HAVE INFLUENCE OVER IN THE HOUSEHOLD**

1. Restaurant choice
2. Grocery purchases
3. Her clothing
4. Vacation destination
5. Computer/tech equipment purchased for home

**SOURCE:** AllyKatz

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**SOURCE:** AK Tweens (AllyKatz.com), Denise Restauri, Founder/CEO, 101 W. 55th St., #15K, New York, NY 10019; 212-757-7841; denise@allykatz.com.

## factoids

- ▶ Slightly more than four in 10 consumers (41%) sent a **Valentine's Day** card in 2009, compared to 50% who did so in 2007. (*Unity Marketing; phone 717-336-1600*)
- ▶ Americans spend an average of \$7,200 for a traditional **burial**, compared to an average of \$1,400 for a crematory fee, service, and urn. (*Cremation Association of North America; phone: 312-245-1077*)
- ▶ Excluding housing and rent, the **average household** spent \$37,782 in 2009, on everything from general shopping (\$8,668) to health and family needs (\$8,026) to transportation (\$5,477). (*Bundle.com; phone: 646-805-2036*)
- ▶ More than a third of Baby Boomers (37%) and Gen Xers (36%) say the recession has significantly **altered their spending habits**, compared to 25% of Gen Yers. (*Price-waterhouseCoopers; phone: 513-361-8094*)

### ONLINE SOURCES CONSUMERS USE WHEN SHOPPING FOR PRODUCTS OR SERVICES AVAILABLE LOCALLY, 2010

Search engines .....	90%
Online Yellow Pages .....	48%
Comparison shopping sites .....	42%
Vertical shopping sites .....	24%

**SOURCE:** BIA/Kelsey; phone: 781-556-1026

- ▶ Americans spent \$1.2 billion while **shopping on mobile devices** in 2009, nearly triple the \$363 million they spent in 2008. (*ABI Research; phone: 516-624-2500*)
- ▶ Nearly half of women (48%) attempt to balance fashion and comfort when selecting their **footwear**, while 43% prefer to wear sneakers with jeans. (*Kiwi; phone: 630-598-8722*)
- ▶ Although 68% of Americans think the Gulf oil spill could slow the U.S. economic recovery, 72% say it will not affect their **personal spending**. (*RBC; phone: 212-428-6902*)
- ▶ Nearly eight in 10 shoppers (79%) are more concerned about economic issues than **environmental issues**; however 35% expect to spend more on green products in the coming year. (*Cohn & Wolfe; phone: 415-365-8548*)
- ▶ The vast majority of Americans (83%) have made permanent changes in spending as the result of the recession, and 43% believe the **economic changes** have affected them positively. (*Carton Donofrio Partners; phone: 410-576-9000*)
- ▶ Between 2006 and 2008, when **gas prices** fluctuated and spiked, consumers spent 4.5% less at grocery stores and 2.4% more at supercenters and mass retailers for a 100% increase in gas prices. (*Marketing Science Institute; phone: 617-491-2060*)

### FAST FACTS:

#### Hispanics & The Economy

- ▶ Hispanics account for 16% of the U.S. population, but 50% of consumer spending growth in 2010.
- ▶ Only 8% of retirees in 2010 are Hispanic, meaning they are disproportionately more likely than those of other races/ethnicities to be earning a paycheck.

**SOURCE:** Geoscape, Cesar Melgoza, 12100 W. Flagler St., Miami, FL 33135; 305-860-1460; www.geoscape.com.

### FAST FACT:

#### Saving & Spending

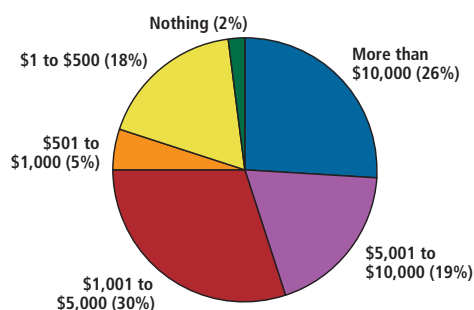
- ▶ 59% of Blacks and 56% of Hispanics save money in advance to prepare for extra spending during the winter holidays, such as Christmas.

**SOURCE:** Sears/Kmart; phone: 847-286-7397

- ▶ Among the 16% of Americans who think their **jobs are more stable** than they were a year earlier, 60% have increased their level of spending and investing, including 35% who are spending more on dining out and 31% who are spending more on travel. (*American Express; phone: 212-640-0512*)
- ▶ Avid athletes (38%) buy ankle length **socks** and 25% buy crew length socks; by comparison, 26% of moderate athletes buy ankle length socks and 36% buy crew length socks. (*Cotton Incorporated; phone: 212-413-8340*)
- ▶ More than eight in 10 shoppers (81%) have **cut back purchasing** more expensive items such as fish, meat, prepared meals, and convenience items, and 73% intend to maintain this habit after the economy returns to normal. (*Private Label Manufacturers Association; phone: 212-972-3131*)
- ▶ Most shoppers (82%) are willing to forego the instant gratification of financing their purchases via a credit card to use **layaway** instead, and 73% think layaway would help them better manage their spending. (*Sears Holdings; phone: 847-286-0715*)
- ▶ Of the 28% of parents who expect to spend more on **back-to-school shopping** in 2010, 34% say it is because their child needs expensive items, and 26% say school budget cuts require them to purchase additional items. (*Deloitte; phone: 203-905-2708*)
- ▶ The 46% of Americans who managed to add to their savings in the prior year did so by **cutting back** on dining (50%), travel (46%), clothing purchases (35%), home renovations (31%), medical expenses (16%), and higher education expenses (12%). (*American Institute of Certified Public Accountants; phone: 212-596-6111*)

- ▶ Nearly eight in 10 people (78%) would **use a coupon** when taking a first date to a theater, and 71% would do so when taking a first date to a restaurant. (*RedPlum/Valassis; phone: 734-591-7375*)
- ▶ More than eight in 10 parents (83%) buy their child new shirts and tops for **back-to-school**, 80% buy jeans, and 73% buy socks. (*Cotton Incorporated; phone: 212-413-8340*)
- ▶ Nearly half of men (49%) plan to start their **holiday shopping earlier** in 2010 than they did in 2009 in order to spread their purchases out and ease the strain on their budgets. (*Pricegrabber; phone: 323-601-1231*)
- ▶ Six in 10 consumers (60%) use **coupons** on food and catering services to save on the cost of entertaining for Christmas or Hanukkah, and 52% use coupons when shopping for gifts. (*Valpak; phone: 723-399-3175*)
- ▶ Nearly two thirds of shoppers (63%) look for deals or coupons when making an **online purchase**. (*Ipsos; phone: 646-313-6117*)
- ▶ Nearly one in five consumers (17%) plan to use their **mobile phone** to research holiday purchases, 56% of whom will use their devices to compare prices; in addition, 72% of consumers will research products online. (*Deloitte; phone: 203-905-2708*)

▶ **HOW MUCH AMERICANS SPENT ON THEIR WEDDING, 2010**



SOURCE: Visa; phone: 703-683-5004, x108

**FAST FACTS:**

**Shopping Help**

- ▶ 34% of consumers used a circular from a newspaper to help them shop during their last trip to a grocery store.
- ▶ 26% of consumers used a circular from the store.
- ▶ 11% asked a sales associate for assistance.

SOURCE: M/A/R/C Research; phone: 972-983-0436



# sports & fitness

Football continues to pull away from the pack as Americans' favorite sport as fewer claim basketball or baseball to be tops. Football wins among young adults and Blacks; Hispanics are more evenly split as baseball and football fans.

Whatever their favorite, most Americans follow sports. They are nearly as likely to primarily keep up with sports news and scores online as they are to watch on TV.

Fantasy sports and sports-related videogames allow fans an additional level of engagement. Those who play sports videogames are more likely than average to describe themselves as avid fans of the same sport they play on their console. Fantasy sports players pay close attention to stats and scores, with nearly half getting such information from their mobile devices.

## Pro Football Scores, Basketball & Baseball Slide

More than a third of Americans (35%) claim professional football as their favorite sport, up 11 percentage points since 1985, finds Harris Interactive. It is followed distantly by baseball (16%, down seven points), college football (12%, up two points), and auto racing (9%, up four points), finds Harris Interactive. Only 5% say professional basketball is their favorite, which experienced a high in the late '90s when 13% said it was tops.

Among Blacks:

- ▶ Pro football is by far the favorite sport (45%).
- ▶ They under-index as fans of baseball (7%), college football (6%), and auto racing (0%).

Among Hispanics:

- ▶ They under-index as fans of professional football (26%).
- ▶ They over-index as fans of baseball (24%).

Among young Americans:

- ▶ 18-24 year olds are nearly as likely to say college football is their favorite sport (26%) as they are to name pro football (27%).

**SOURCE:** "Football Expands Lead As America's Favorite Sport," Harris Interactive, Tracey McNeerney, 60 Corporate Woods, Rochester, NY 14623; 585-214-7756; tmcneerney@harrisinteractive.com; www.harrisinteractive.com.

## Sports Fans Tune In To TV, Internet & Social Media To Follow Their Favorite Teams And Players

More than two thirds of self-identified sports fans (68%) are casual fans who follow sports from time to time, according to Burst Media. The other 32% are avid fans who try to stay updated as possible on sports scores and news.

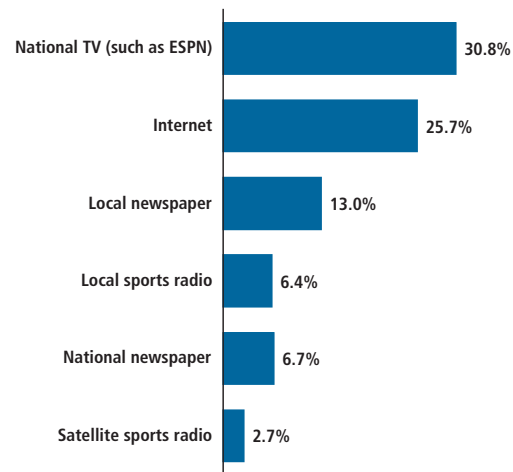
Avid fans are nearly three times as likely to be male (74%) as female (26%). Casual fans are more evenly split, with 53% male and 48% female [Ed: Total does not equal 100% due to rounding].

Nearly half of avid fans (46%) are aged 35-54, and 22% are aged 25-34. They are more likely than average to have graduated college (55%), and 27% have an annual household income of \$75,000 or more.

Sports fans are slightly more likely to get their news and information from national TV broadcasts than from the Internet (see chart). However, they are more likely to say the Internet (32%) is the best source for sports news, followed by national TV (30%). Female fans (36%) are more likely than male fans (27%) to say national TV is the best source of news, whereas male fans (37%) are more likely than female fans (24%) to say the Internet is the best source.

Three in 10 sports fans (30%) say they are more likely to buy a product if it is endorsed by their favorite sports team

PRIMARY MEDIUM SPORTS FANS USE TO GET SPORTS NEWS AND INFORMATION, 2010



**SOURCE:** Burst Media

or athlete, and among avid fans, that proportion jumps to 41%.

A quarter of sports fans (25%) follow their favorite athlete or team on a social network such as Facebook or Twitter. Avid fans (36%) are more likely than average to do so. Considering that younger Americans are more likely to use social media, it is not surprising that they are also more likely to use such sites to follow their favorite teams and athletes:

- ▶ 37% of 18-24 year olds do so, as do
- ▶ 33% of 24-34 year olds;
- ▶ 27% of 35-44 year olds;
- ▶ 18% of 45-54 year olds; and
- ▶ 12% of those aged 55 and older.

**SOURCE:** "Online Sports Scoreboard: Web Behaviors, Preferences, And Attributes Of Sports Fans," Burst Media, Chuck Moran, Director Marketing, 8 New England Executive Park, Burlington, MA 01803; 781-852-5291; cmoran@burstmedia.com; www.burstmedia.com. Price: Available online at no charge.

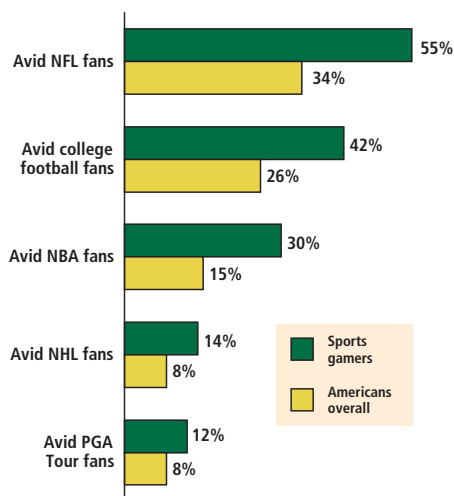
## Sports Gamers Are Avid Sports Fans

Among households with a videogame console, 69% that include avid sports fans also own at least one sports videogame, finds the ESPN Sports Poll. Sports gamers are more likely than the average American to be avid sports fans. For example, 55% of sports gamers are avid football fans, compared to 34% of the overall population.

About 75% of sports gamers say that in-game advertising reinforces a company's real-world sponsorship of that sport. NHL fans are the most likely to say so (78%), followed by 74% of NBA fans, 73% of PGA Tour fans, and 71% each of college football and NFL fans.



**AVID SPORTS FANS, SPORTS GAMERS VS. AMERICANS OVERALL, 2010**



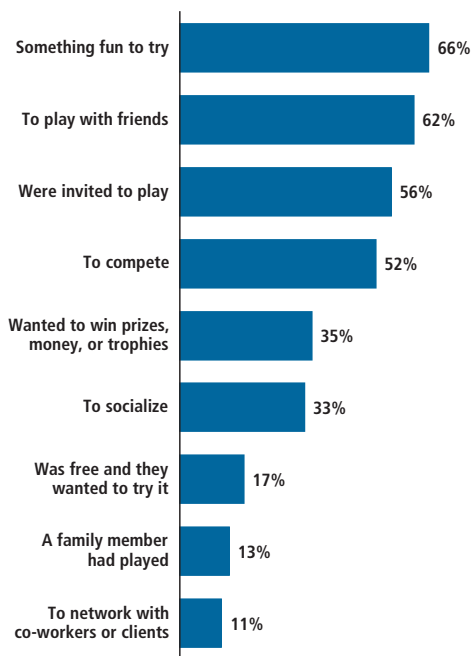
SOURCE: ESPN Sports Poll

SOURCE: "Sports Gamers," ESPN Sports Poll, Rob Fox, SVP, 410 Horsham Rd., Horsham, PA 19044; 215-442-9652; robert.fox@tns-global.com; www.sportspoll.com. Price: Call for information.

**Fantasy Sports Players Get Stats, Manage Teams On Mobile Devices**

Fantasy sports players are turning to mobile devices to support their hobby, finds the Fantasy Sports Trade Association.

**REASONS FANTASY SPORTS PLAYERS GOT STARTED WITH THE HOBBY, 2010**



SOURCE: Fantasy Sports Trade Association

ation. More than four in 10 (43%) have used a mobile device to get scores of actual games, and 38% to get real-time fantasy game or player stats. A third (34%) use such devices to get player news or injury reports.

They also use mobile devices to manage their fantasy teams, including to update lineups or make trades (28%), to send messages and razz other players in their fantasy league (22%), and to access cheat sheets and rankings to assist in their draft selections.

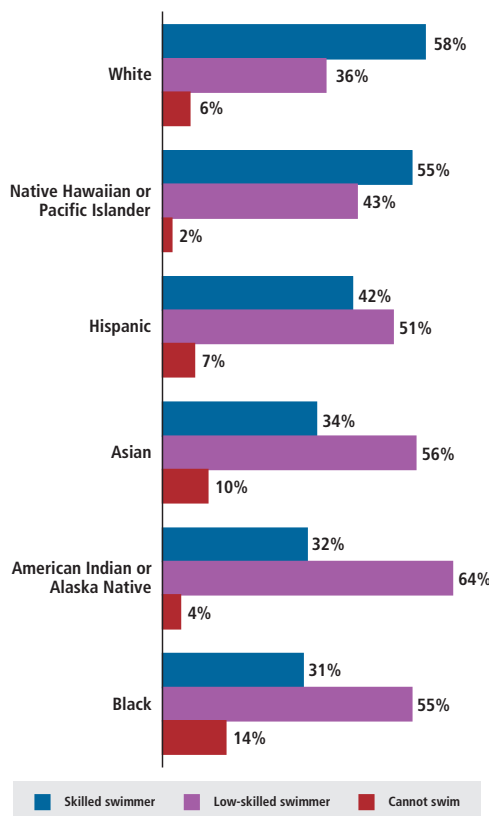
A majority of fantasy sports players got started because it sounded like something fun to try, but most also wanted to compete in a league. Of those who play, 71% plan to play as much as they have in prior years, and 8% expect to spend more time playing than in the past.

SOURCE: "Fantasy Sports Research," Fantasy Sports Trade Association, Jeff Thomas, President, PO Box 896, Kenosha, WI 53141; 262-308-5544, jeff.thomas@sportsbuff.com; www.fsta.org. Price: \$600 membership fee.

**Childrens' Ability And Attitude Toward Swimming Varies By Race**

Black and Hispanic children aged 4-18 are less like than White children to say swimming is an activity they enjoy,

**SWIMMING ABILITY OF CHILDREN AGED 4-18, BY RACE/ETHNICITY, 2010**



SOURCE: USA Swim

according to USA Swim. Black children are more likely than Whites to say they do not like to get their hair wet when swimming, and less likely to say their friends know how to swim or that their parents encourage them to swim.

Hispanic children are more likely than Whites to say they are not physically fit, which affects their ability to swim, and that they are concerned about injuring themselves while swimming. They are less likely to believe they could be a successful competitive swimmer.

**SOURCE:** "Constraints Impacting Minority Swimming Participation, Phase II," USA Swimming, Erin Greene, 1 Olympic Plaza, Colorado Springs, CO 80909; 719-216-4212; [egreene@usaswimming.org](mailto:egreene@usaswimming.org); [www.usaswimming.org](http://www.usaswimming.org). Price: Available online at no charge.

## factoids

- ▶ Nearly a quarter of Americans (24%) plan to watch the **World Cup** soccer tournament, including 31% of men and 17% of women. (*Zogby; phone: 202-429-0022*)
- ▶ Nearly 50% of Americans would skip work to watch their team in a big **college football game**, and 17% would skip a family wedding to do the same. (*Dave & Buster's; phone: 214-357-9588*)
- ▶ Fewer than one in 10 adults (8%) went **skiing or snowboarding** in the prior year; those in New Hampshire (22%) are the most likely to participate in the sports. (*The Media Audit; phone: 800-324-9921*)
- ▶ The vast majority of Americans (85%) **exercise** at least one day a week; of those 74% workout at home, compared to only 20% who go to a gym. (*Rasmussen Reports; phone: 732-776-9777*)
- ▶ Nearly a quarter of adults (24%) plan to watch the Masters golfing event due to **Tiger Woods's** return to the sport. (*Zogby Interactive; phone: 877-462-7655*)
- ▶ American adults take an average of 5,117 **steps per day**, compared to an average of 7,168 for Japanese adults and an average of 9,650 for Swiss adults. (*American College of Sports Medicine; phone: 317-637-9200, x133*)



# travel & leisure

Those who fly for travel or business have a variety of complaints about the experience — from anger over baggage fees to annoyance at security measures — but they still get on board, and spending on travel rebounded in 2010.

Americans scrimped and saved to be able to afford a family vacation, a luxury many did not manage the year before. One way they found deals on vacations was by booking last-minute flights.

Most travelers planned to visit somewhere new; urban vacations were most popular, followed by beach trips. When it comes to booking, most do so online. Americans are most trusting of vacation recommendations from friends and families, and they are nearly equally trusting of travel agents, online travel agencies, and online trip advisory sites.

Americans have slightly more free time than in previous years, which many filled with TV shows and sleeping. Watching TV is Americans' most common leisure activity, so much so that when their favorite shows go on summer hiatus, they fill the time they spend watching those shows with summer shows or reruns.

But Americans are also physically active. A third exercise regularly, and most keep busy with events and hobbies, such as gardening, volunteer work, and photography. Most Americans read during their leisure time, a hobby that has seen a resurgence thanks to the popularity of e-reader devices. Those who have e-readers use them frequently and read and buy a greater number of books per year than those who do not own an e-reader.

## The Modern Traveler Is Environmentally-Conscious And Uses New Media As A Source For Information And Deals

Travel is a key indicator of consumer confidence in the economy, and according to Travelocity, marketers and advertisers have reason to smile. It finds that 49% of Americans plan to increase their travel in 2010 compared to the prior year. That is up from 21% six months ago, and only 10% in 2009. Meanwhile, the proportion planning to decrease its amount of travel fell to only 7%, down from 34% in 2009.

While most travelers (56%) do not have a set budget for travel in 2010, 34% of those who do say it is greater than it was in 2009.

Even though Americans are traveling again, they're still pinching pennies. More than three quarters (76%) will likely book a packaged vacation as a way to save. However, many will also spend more if there is a deal to be had: a third (33%) would stay in a higher rated hotel, 30% would book a trip they had not expected to take, and 18% would extend their stay to take advantage of deals.

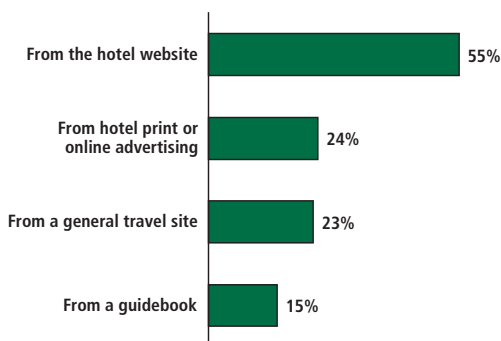
### Eco-Travel

More than four in 10 travelers (42%) are “green” travelers — self-described as being concerned about the environment — according to Community Marketing Inc. Green travelers have the same motivations as other travelers: 58% made their most recent trip for rest and relaxation. Most (55%) travel to visit friends and family, 49% to explore their destination city, and 40% to engage in a particular activity in the region.

Green travelers are motivated primarily by their overall concern for the environment (81%), but also specifically by global warming (51%), their interest in supporting businesses that engage in sustainable practices (40%), personal health concerns (37%), and their children’s future (25%).

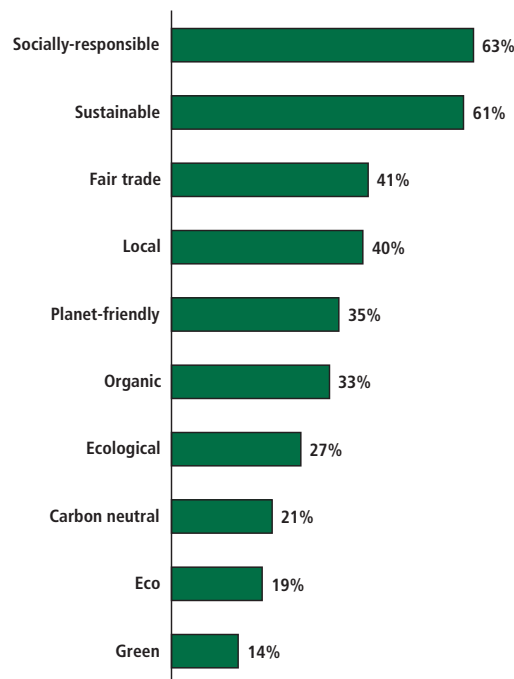
Despite their interest in eco-friendly travel, only a slight majority of green travelers (54%) took what they considered to be a “greener” vacation in the prior year. That number is

HOW GREEN TRAVELERS LEARN ABOUT A HOTEL'S GREEN INITIATIVES, 2009



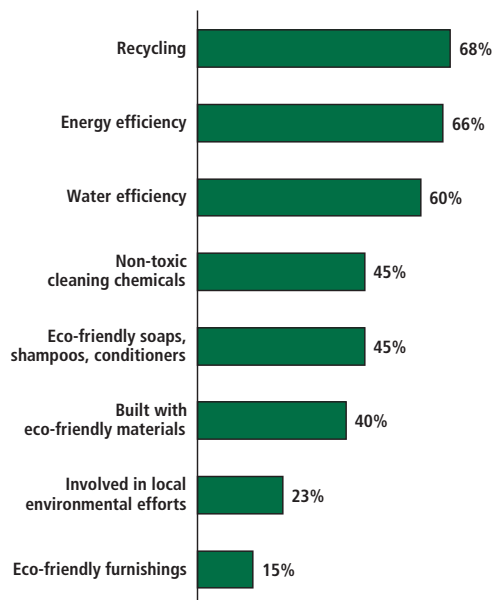
SOURCE: Community Marketing Inc.

MARKETING TERMS THAT GREEN TRAVELERS PREFER, 2009



SOURCE: Community Marketing Inc.

GREEN INITIATIVES OF MOST IMPORTANCE TO GREEN TRAVELERS WHEN SELECTING A HOTEL, 2009



SOURCE: Community Marketing Inc.

likely low because most green travelers cannot name an eco-friendly airline (65%) or hotel (60%).

They define green travel as:

- ▶ Incorporating eco-friendly hotels that use renewable

energy sources, recycles, and reuses linens instead of daily washing (87%);

- ▶ Relying on mass transit (60%);
- ▶ Sourcing from local businesses (50%);
- ▶ Incorporating companies that donate to environmental causes (45%);
- ▶ Including carbon neutral offsets built into pricing (38%); and
- ▶ Incorporating companies that have qualified for third-party green certification (32%).

With green travelers most commonly defining eco-friendly travel based on their hotel choices, it is logical that the vast majority (86%) always participate in the hotel's green initiative, such as reusing towels or using in-room recycling. Nearly four in 10 (39%) claim a hotel's green initiative is more important than the brand of hotel, and 30% say it is more important than its star rating. However, only 10% say it is more important than price, and a mere 8% say it is more important than location.

More than two thirds of green travelers (68%) plan to shop for greener travel and destinations in the future, and 24% will make it a priority to visit environmentally-threatened areas, such as Mt. Kilimanjaro, Antarctica, and parts of Alaska. One in five (20%) would pay more to visit green destinations.

### Travel and Social Networking

Most travelers (59%) visit social networks, finds YPartnership. Nearly half of those who do upload photos and videos to their profiles (49%), and 46% rate products and services they have used. A small proportion also uses such sites to seek out information for travel, including:

- ▶ Asking for advice about a destination (11%);
- ▶ Asking for advice about a travel service provider (8%);
- ▶ Learning about travel deals (6%);
- ▶ Getting updates on destinations and travel service providers (5%); and
- ▶ Joining communities with like travel interests (5%).

**SOURCES:** "Traveler Confidence Report," Travelocity, Amanda Borichevsky (Vollmer PR), 3150 Sabre Dr., Southlake, TX 76092; amanda@vollmerpr.com; www.travelocity.com. Price: Available upon request at no charge.

"Green Traveler Study," Community Marketing Inc., David Paisley, 584 Castro St., #834, San Francisco, CA 94115; 415-437-3800; david@communitymarketinginc.com; www.communitymarketinginc.com. Price: Call for information.

"TravelHorizons," YPartnership, Amanda Jackson, 423 S. Keller Rd., #100, Orlando, FL 32810; 407-838-1812; amanda.jackson@ypartnership.com; www.ypartnership.com. Price: \$3,200 for U.S. Travel Industry Association members; \$4,000 for non-members.

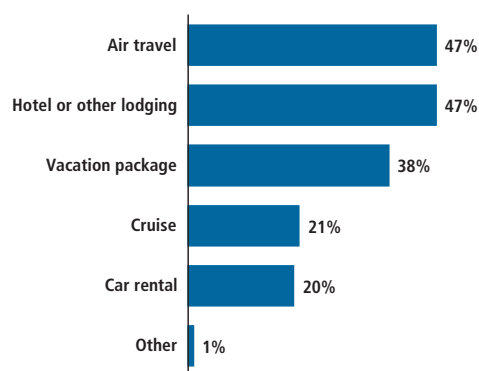
U.S. Travel Industry Association, Cathy Keefe, 1100 New York Ave. NW, #450, Washington, DC 20005; 202-408-8422; ckeefe@tia.org; www.tia.org.

## Travelers Embrace 'Flash Sales' To Get Deals On Trips

More than a quarter of Americans (27%) have taken a "last-minute" vacation in the prior year, according to YPartnership. That is about equivalent to the proportion who took a "staycation" within 50 miles of their local area as an alternative to a vacation that would have required traveling a greater distance.

On average, these last-minute travelers planned their trips just six days in advance of their departure. Some 14% booked the trip as the result of a "flash sale," such as an email blast relating time-sensitive deals or discounts.

TYPES OF TRAVEL THAT AMERICANS HAVE BOOKED FOR A LAST-MINUTE TRIP, 2010



**SOURCE:** YPartnership

**SOURCE:** "2010 Portrait of American Travelers," YPartnership, Amanda Jackson, 423 S. Keller Rd., #100, Orlando, FL 32810; 407-838-1812; amanda.jackson@ypartnership.com; www.ypartnership.com. Price: \$2,950.

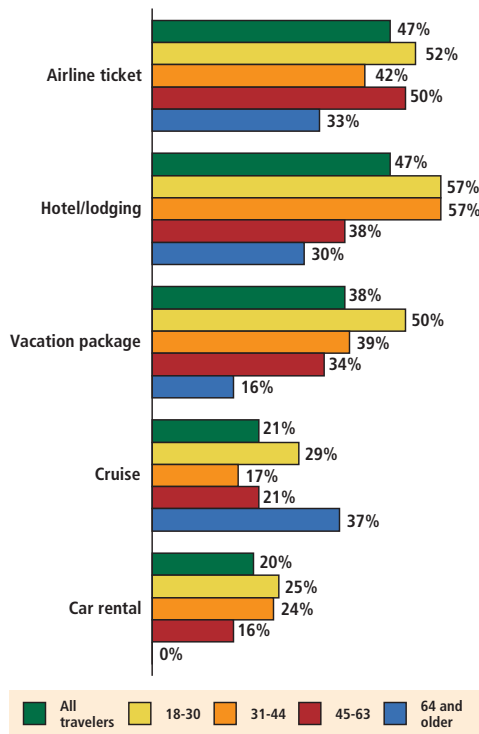
## Travelers Get Going With Last-Minute Trip Purchases

More than a quarter of travelers (27%) took at least one last minute trip in 2009, reports YPartnership. One in seven (14%) booked their last minute trip as the result of an email from a travel service supplier that required an immediate response to book the featured price or offer. Those aged 18-30 (17%) and 31-44 (18%) are more likely than their older peers to do so. However, travelers aged 64 and older are more likely than all other groups to book a last-minute cruise.

Those with incomes of \$125,000 or more (21%) are more likely than average to book a last-minute trip. They are significantly more likely than those with incomes of \$50,000 to \$125,000 to book a cruise (29% vs. 20%).

Four in 10 travelers who made a last-minute purchase because of an email (40%) booked either a hotel room or airfare, while 38% booked a vacation package.

**TYPES OF TRAVEL PURCHASES TRAVELERS HAVE MADE IN RESPONSE TO A LAST-MINUTE EMAILED OFFER, 2009**



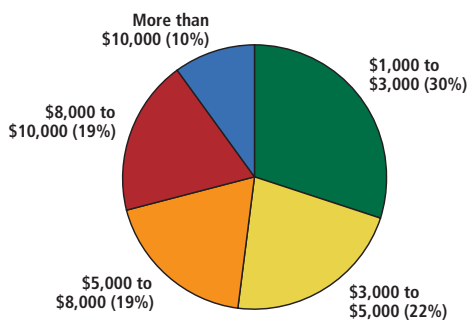
SOURCE: Ypartnership

SOURCE: "2010 Portrait Of American Travelers," Ypartnership, Amanda Jackson, 423 S. Keller Rd., #100, Orlando, FL 32810; 407-838-1812; amanda.jackson@ypartnership.com; www.ypartnership.com. Price: Call for information.

**Family Vacations Are Back In 2010**

The vast majority of families with children (92%) plan to take at least one family vacation in 2010, up from 88% in 2009, according to TripAdvisor. Some 33% plan to take both domestic and international family trips, up 5% from the year prior. Three quarters (75%) plan to spend the same or more on family travel in 2010 compared to 2009.

**AMOUNT FAMILIES PLAN TO SPEND ON VACATIONS IN 2010**



SOURCE: TripAdvisor

To entertain their children on trips, 45% of parents turn on a TV or DVD player, 23% encourage their children to read, and 10% give their kids new toys.

SOURCE: "Family Travel," TripAdvisor, Brooke Ferencsik, 141 Needham St., Newton, MA 02464; 6174-670-6575; bferencsik@tripadvisor.com; www.tripadvisor.com.

**Family Vacation Plans Up In 2010**

More than nine in 10 families (92%) will vacation this year, up from 88% who did so last year, according to travel community Trip Advisor. Half of parents (48%) say the ability to spend quality time together is the most enjoyable aspect of the family vacation. Also:

- ▶ 52% of parents believe travel is "very important" to a child's education, with an additional 35% believing it's "somewhat important."
- ▶ 75% of those under age 18 have visited more than six U.S. states and 73% have traveled internationally.
- ▶ 44% of parents think airplanes are the most stressful mode of transportation, while 16% cite car travel. Three in 10 (31%) say traveling with children is stress-free.
- ▶ 11% of parents have given their child an antihistamine to put them to sleep while traveling.
- ▶ TV or DVD players are the resources most likely to be used by parents to entertain children while traveling (45%); 23% encourage kids to read books, and 10% rely on new toys.
- ▶ The largest number of families (47%) expect to spend roughly the same amount on family trips as they did last year, while 28% expect to spend more; 30% will spend \$1,000-\$3,000, 22% will spend \$3,000-\$5,000, 19% will spend \$5,000-\$8,000, and 10% will spend more than \$10,000.

**MOST POPULAR FAMILY VACATION ACTIVITIES, 2010**

Relaxing at beach	69%
Visting historical site	62%
Visiting a museum	50%
Visting a national park	46%
Visiting an amusement or theme park	41%

SOURCE: Trip Advisor

**PRICE INCREASE ADULTS WILL ACCEPT IN ORDER TO ENJOY CHILD-FREE SECTIONS**

Airplane	33%
Restaurant	32%
Pool	26%
Hotel	21%
Beach	21%
Museum	9%

SOURCE: Trip Advisor

SOURCE: Trip Advisor, Alexandra Botti, 464 Hillside Ave., Needham, MA 02494; 617-670-6529; abotti@tripadvisor.com; www.tripadvisor.com.



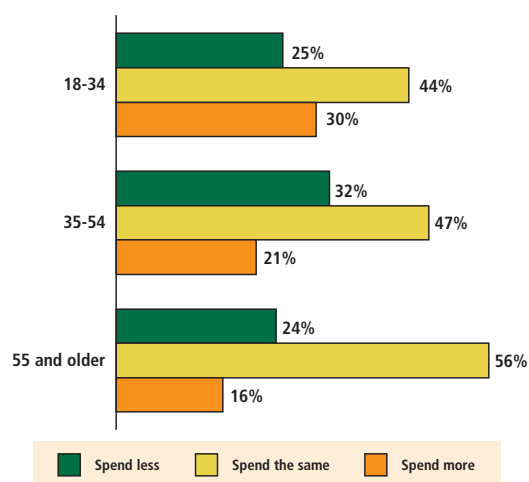
## Tentative Travelers Will Spending Less In 2010

More than a quarter of travelers 27% plan to spend less on vacations in 2010 than they did in 2009, 22% plan to spend more, and 50% plan to spend the same amount, according to the Gallup Poll.

Three in 10 (30%) expect to spend less on hotel stays in 2010, and 29% expect to spend less on flights.

Those aged 35-54 (32%) are the most likely to say they will spend less on vacations in 2010, while those aged 18-34 (30%) are the most likely to say they will spend more.

TRAVELERS' EXPECTED SPENDING ON VACATIONS IN 2010 COMPARED TO 2009



SOURCE: Gallup Poll

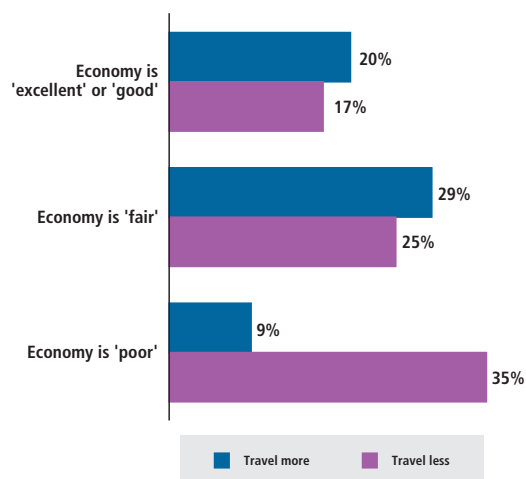
SOURCE: "Travel Industry Dealing With Cautious Consumers," Gallup Poll, Lydia Saad, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.gallup.com.

## Americans Sacrifice For Summer Vacation: After A Recession Rollback, Travel Plans Are On An Upswing

Once sacrosanct, many Americans gave up their summer vacations — and other travel occasions — during the economic downturn. As the country emerges from recession, Americans are beginning to travel again, though the way they purchase airfare, hotel rooms, and packages has changed. Rather than making advance travel plans, they are searching for last-minute deals; those who do plan ahead are deal-oriented and price conscious.

Overall, 18% of Americans are planning more summer travel than in 2009, while 27% plan to travel less, according to Gallup. Perceptions about the economy continue to affect travel plans — those more optimistic about current conditions are more likely to be upping their travel plans. Simi-

AMERICANS SUMMER TRAVEL PLANS, COMPARED TO THEIR PERCEPTION OF THE ECONOMY, 2010



SOURCE: Gallup

larly, their expectations for the future affect their plans: those who think it will get worse are more likely to say they will travel less (33%) than more (10%).

Travelers aged 50 and older are more likely to plan less travel than more travel. Among men aged 50-plus, 23% will travel less, versus 17% who will travel more; 27% of women aged 50-plus will travel less, versus 8% who will travel more. This group is among the hardest hit by the recession. With their retirement savings drastically reduced during the recession, they are cutting back on "luxuries" and unnecessary expenses, including travel.

Those who are traveling are more willing to increase the amount they spend on getting to their destination than the amount they spend on food, housing, entertainment, and other incidental vacation expenses. Nearly a third (32%) plan to spend more on transportation, compared to 19% who expect to spend less. Some 27% plan to spend more on other vacation costs, compared to 21% who expect to spend less.

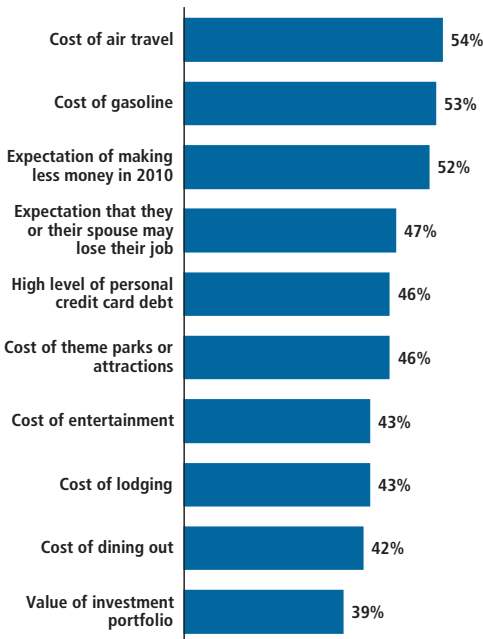
A variety of monetary issues factor into Americans' decisions to take vacations, with the ever-vacillating costs of air travel (54%) and gasoline (53%), topping the list in 2010, according to Ypartnership (see chart, p.5). Those factors leapfrogged financial issues, including personal debt and stock portfolio value, which play less of a role in travel decisions than in 2009.

### Kicking Off The Summer Vacation Season

Nearly a third of Americans planned to travel during Memorial weekend 2010, up from 24% in 2009, according to Deloitte. In addition, 17% planned to take longer trips than they did in the prior year. Two thirds (65%) will take a vacation between Memorial weekend and Labor Day.

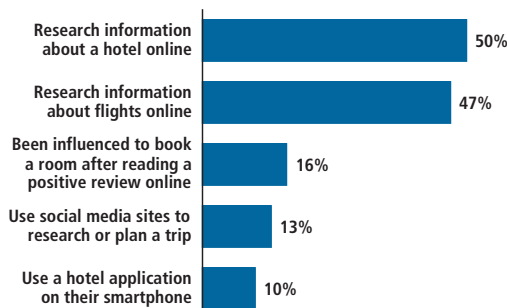
The nearly a third of travelers (31%) who postponed a vacation in the prior year were planning to take one in 2010,

**MONETARY FACTORS INFLUENCING AMERICANS' PLANS TO VACATION IN 2010**



SOURCE: Ypartnership

**HOW AMERICANS USE TECHNOLOGY TO RESEARCH OR MAKE TRAVEL PLANS, 2010**



SOURCE: Deloitte

notes TripAdvisor. Most travelers will spend the same amount (42%) or more (31%) on travel in 2010 as in 2009, reports TripAdvisor. Nearly half (49%) say the economy will not affect their travel plans.

Most of those who plan to travel (62%) will vacation somewhere new in 2010. A slight majority (55%) plan to visit a city, 45% will go to a beach, and 22% will visit a resort.

While they should be relaxing, some vacationers encounter annoyances. Out-of-control children (48%) top their lists, followed by people cutting in line at theme parks and attractions (10%), and erratic drivers (10%).

Some travelers let loose while away from home. They have:

- ▶ Been publicly intoxicated (17%);
- ▶ Went skinny dipping (13%);

- ▶ Visited a private beach or pool without permission (8%);
- ▶ Had a spontaneous romantic fling (8%); and
- ▶ Sunbathed nude (7%).

Air regulations regarding the transport of liquids — particularly beauty products — have some female travelers frazzled, finds Unilever. They would be willing to give up freebies including movies (55%) and drinks (32%) to be able to keep their beauty items with them at all times during travel, regardless of size. More than a third (37%) would even give up a first-class seat, and 16% would accept a middle seat between crying children for the privilege.

Nearly a quarter of workers (23%) plan to take a week off for vacation in 2010, up from 19% in 2009, according to CareerBuilder. Some 12% will take two weeks off. More than two in 10 (21%) are not planning a vacation because they cannot afford it.

About half of employers (49%) expect workers to check in while on vacation, including 37% who say it is necessary when they are working on major projects. That exceeds workers' plans — only 25% say they will check in, regardless of what they are working on.

**SOURCES:** "One in Four Plan To Travel Less This Year," Gallup, Dennis Jacobe, Chief Economist, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.gallupoll.com. Price: Available online at no charge.

"TravelHorizons," Ypartnership, Amanda Jackson, 423 S. Keller Rd., #100, Orlando, FL 32810; 407-838-1812; amanda.jackson@ypartnership.com; www.ypartnership.com. Price: Call for information.

"Summer Travel," Deloitte, Cory Ziskind, 1633 Broadway, New York, NY 10019; 212-492-4408; cziskind@deloitte.com; www.deloitte.com. Price: Call for information.

"Annual Travel Survey," TripAdvisor, Brooke Ferencsik, 141 Needham St., Newton, MA 02464; 617-4-670-6575; bferencsik@tripadvisor.com; www.tripadvisor.com.

"Annual Vacation Survey," CareerBuilder, Richard Castellini, VP Consumer Marketing, 8420 W. Bryn Mawr Ave., #1000, Chicago, IL 60631; richard.castellini@careerbuilder.com; www.careerbuilder.com. Price: Available online at no charge.

"Degree Women Body Mists Survey," Unilever, Malini Patel, Brand Manager, 205 N. Michigan Ave., Chicago, IL 60601; 312-661-2456; www.unilever.com. Price: Available online at no charge.

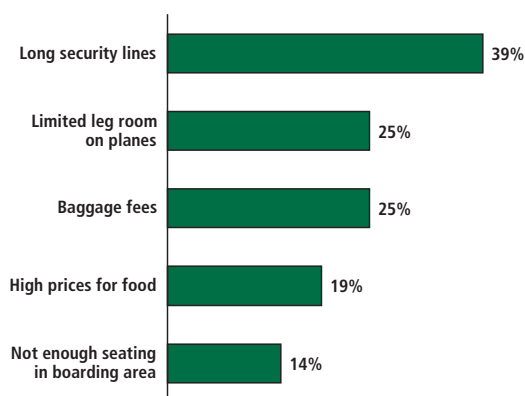
**Fliers Have Complaints But Get On Board**

Baggage fees are among travelers' top complaints, and 58% often carry on their baggage to avoid the charges, reports TripAdvisor. Most travelers (62%) are comfortable putting their bag above someone else's row if the compartment above their row is full, though 57% would prefer that each seat on the plane had an assigned space overhead, even if that meant bags would have to be smaller.

While travelers are okay with being subjected to full body scanners at the airport, only 45% would say anything if the person sitting next to them were accessing inappropriate content on their computer using in-flight Wi-Fi. Only 27% would alert a flight attendant, whereas 22% would ask the

person to refrain from accessing the content and file a complaint with the airline. When it comes to accessing Wi-Fi themselves, 30% would be more likely to book a flight with in-flight Wi-Fi. Most (61%) would not pay extra for Wi-Fi, and 27% would not pay more than \$5.

#### TRAVELERS TOP COMPLAINTS ABOUT FLYING, 2010



SOURCE: TripAdvisor

SOURCE: "Second Annual Air Travel Survey," TripAdvisor, Brooke Ferencsik, 141 Needham St., Newton, MA 02464; 617-670-6575; bferencsik@tripadvisor.com; www.tripadvisor.com.

## Anxious Air Travelers: Security Scares Them

Some 71% of travelers experience anxiety at the airport or during other travel situations, says Case Logic. The majority of those who are nervous in air travel situations (68%) say it is due to airport security-related issues. They are most commonly anxious or frustrated about having to remove their shoes (57%), putting things back into their carry-on bag after going through security (56%), and having to remove their laptops or netbooks from their cases (23%).

Most air travelers (72%) have forgotten an item they needed during a trip. They most commonly forget toiletries, such as a toothbrush or sunscreen (81%). A majority (55%) has forgotten an electronics item, and 50% have forgotten the charger for an electronic item. Most travelers have only themselves to blame if they forget an item; 93% pack their own bags. Men (24%) are more likely than women (6%) to say they have allowed their spouse to pack their bag.

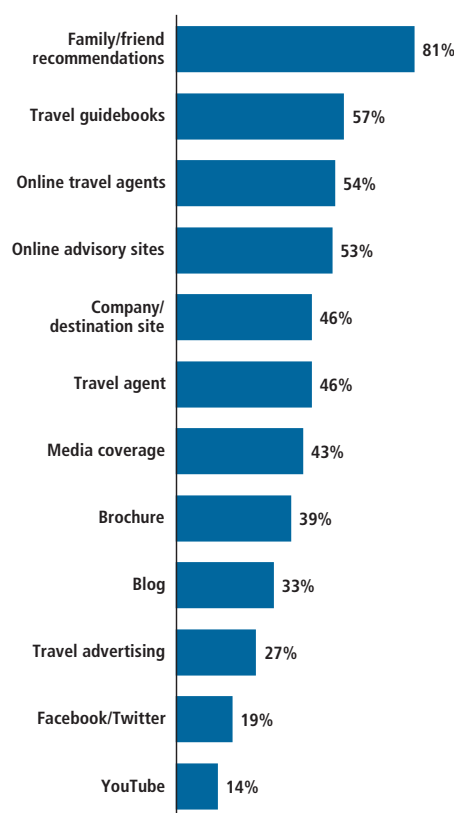
Overall, 7% of travelers are avoiding airline baggage fees by only taking as much as they can fit into their carry-on luggage.

SOURCE: "Travel Survey," Case Logic, Jeff Warde, Global Director of Marketing, 6303 Dry Creek Pkwy., Longmont, CO 80503; 303-652-1110; j.warde@caselogic.com; www.caselogic.com.

## Most Travelers Trust Online Travel Agencies And Advisory Sites

When booking travel, consumers are naturally most trusting of recommendations from those closest to them, friends and family (81%), finds Ypartnership. However, it is not the person-to-person aspect of the recommendation that sways them — they are less trusting of travel agents than online travel agencies, but few trust recommendations from Facebook or Twitter connections.

#### TRAVELERS WHO HAVE A GREAT DEAL OF TRUST IN INFORMATION SOURCES, 2010



SOURCE: Ypartnership

SOURCE: "2010 Portrait of American Travelers," Ypartnership, Amanda Jackson, 423 S. Keller Rd., #100, Orlando, FL 32810; 407-838-1812; amanda.jackson@ypartnership.com; www.ypartnership.com. Price: \$2,950.

## Sunday Is Not A Day Of Rest For Most Americans

Most Americans (83%) look forward to Sundays, according to *Parade* magazine. More than six in 10 (61%) say it is the day when they take care of the things that are most important to them.

Food is an important aspect of Americans' Sunday routines:

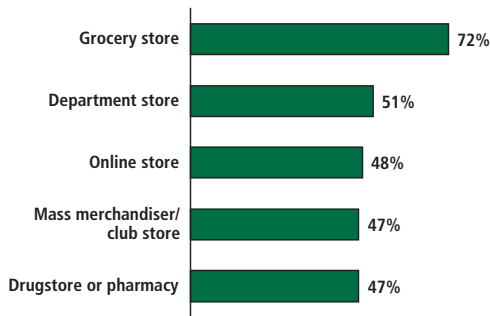
- ▶ 91% have breakfast at home;
- ▶ 89% cook or prepare a meal;
- ▶ 86% have dinner as a family at home;
- ▶ 69% eat out at restaurants; and
- ▶ 59% entertain guests at their homes.

They also take care of their homes. The majority clean or do laundry (76%), work in their garden (56%), and tackle home improvement projects (53%).

Planning for the week ahead is a key Sunday chore. Nearly three quarters (73%) figure out the grocery items they will need, and 62% make a to-do list. Slightly more than half (52%) review and organize their personal finances, and 52% research future purchases.

Most Americans make shopping trips on Sunday, mostly to the grocery store. No surprise, considering part of the day is spent compiling a grocery list.

TYPES OF STORES AMERICANS SHOP ON SUNDAYS, 2010



SOURCE: Parade magazine

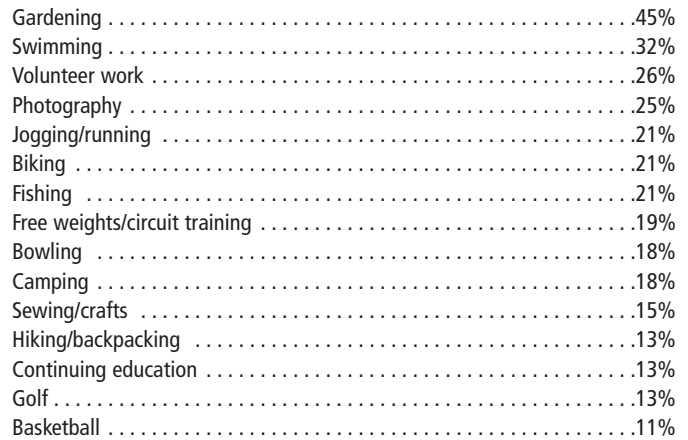
SOURCE: "Sunday In America," Parade, Jim Hackett, SVP Marketing, 711 3rd Ave., New York, NY 10017; 212-450-7125; jim\_hackett@parade.com; www.parade.com. Price: Summary of findings available upon request at no charge.

## Americans Get Busy With Events & Activities

Although most Americans acknowledge that they do not get outside often enough, many of the most common activities they engage in are outdoor hobbies — including gardening (45%), biking (21%), and fishing (21%) — according to Scarborough Research.

Most adults also attended an event or visited a park or attraction during the prior year. Sporting events were most popular, with 35% attending a professional sports game, and 16% a high school sports event. A quarter (25%) visited a zoo; 20% attended a live theatre performance; 13% went to an art museum; and 11% attended a rock concert.

ACTIVITIES AMERICANS ENGAGED IN DURING THE PRIOR YEAR, 2010



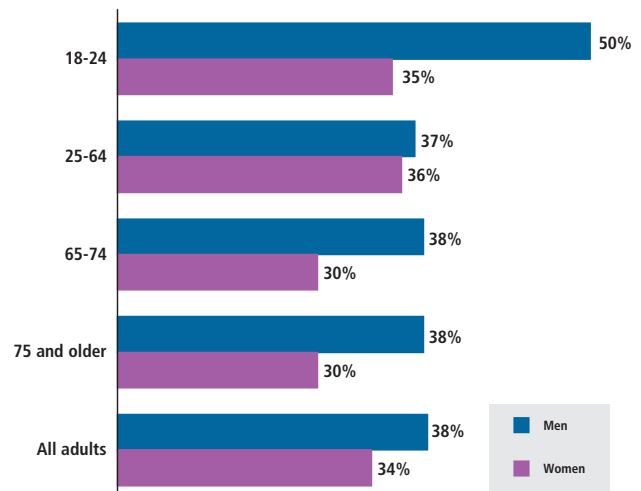
SOURCE: Scarborough Research

SOURCE: "American Events And Activities," Scarborough Research, Allyson Mongrain, Director Marketing and Communications, 770 Broadway, New York, NY 10003; 646-654-8426; amongrain@scarborough.com; www.scarborough.com.

## Americans Sweat It Out, Especially Men

More than a third of adults (35%) engaged in regular leisure-time physical activity in the first three quarters of 2009, an increase over 32% in the same period of 2008, and the highest proportion in over a decade, according to the Centers For Disease Control & Prevention. Among all age groups, men were more likely than women to do so.

LEISURE-TIME PHYSICAL ACTIVITY OF ADULTS, BY AGE, MEN VS. WOMEN 2009



SOURCE: Centers For Disease Control & Prevention

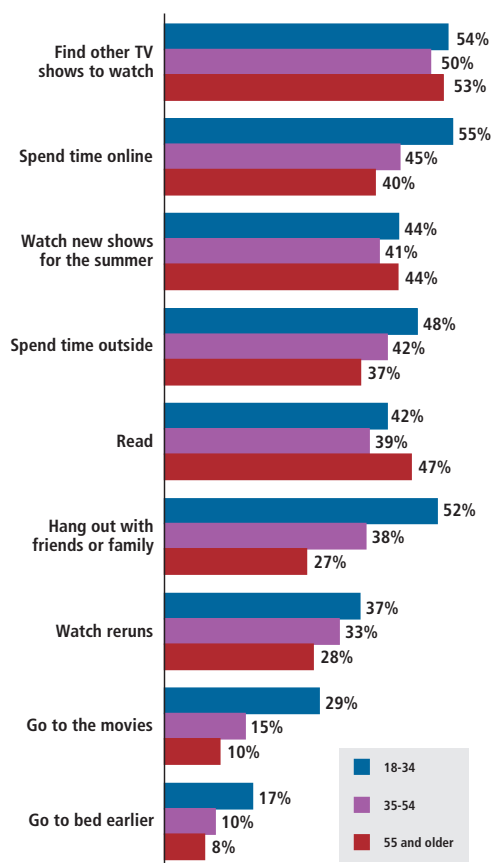
SOURCE: "Health Interview Survey," Centers For Disease Control & Prevention, Stephen Blumberg, Division of Health Interview Statistics, 3311 Toledo Rd., #2112, Hyattsville, MD 20782; 301-458-4107; sblumberg@cdc.gov; www.cdc.gov.

## Summer Hiatus: Most Fill TV Time With Other TV Shows

During the summer season when TV shows go on hiatus, most Americans (52%) fill that time by finding other shows to watch, while 43% tune in to new summer shows and 33% watch reruns, finds BIGresearch. Nearly half (46%) will spend a greater amount of time online, and 42% will spend time outdoors.

The way they fill the time varies widely by age, with the youngest group most likely to spend more time online, hang out with friends, or find other shows to watch. The oldest group is most likely to spend more time reading. Middle-aged Americans are least likely to fill that time with other TV shows.

HOW AMERICANS FILL TIME DURING WHICH THEY USED TO WATCH TV WHEN SHOWS GO ON SUMMER HIATUS, BY AGE, 2010



SOURCE: BIGresearch

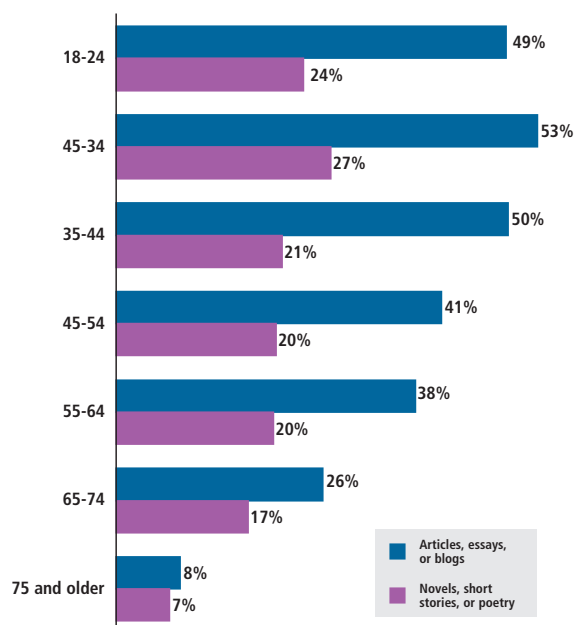
SOURCE: "American Pulse, May 2010," BIGresearch, Phil Rist, VP Strategic Initiatives, 450 W. Wilson Bridge Rd., #370, Worthington, OH 45085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Available upon request at no charge.

## Electronic Media Allow Readers To Engage With Literature, Articles, Essays, And Blogs

More than two in 10 adults (21%) connect with literature — novels, short stories, or poetry — through electronic media, according to the National Endowment for the Arts. That is half the proportion who use electronic media to read articles, essays, or blogs (42%).

Women (22%) are more likely than men (19%) to engage with literature via electronic media, whereas men (43%) are more likely than women (41%) to access articles, essays, or blogs via electronic media. Age is also a factor, with 25-34 year olds more likely than their peers to access literature, as well as articles, essays, and blogs, via electronic media.

AMERICANS WHO ACCESS WRITTEN WORKS VIA ELECTRONIC MEDIA — ARTICLES, ESSAYS, OR BLOGS VS. NOVELS, SHORT STORIES, OR POETRY, BY AGE 2010



SOURCE: National Endowment for the Arts

SOURCE: "How Technology Influences Arts Participation," National Endowment For The Arts, Sunil Iyengar, Director, Office of Research & Analysis, 1100 Pennsylvania Ave. NW, Washington, DC 20506; 202-682-5400; www.arts.gov. Price: Available online at no charge.

## E-Books Are Bright Spot In Book Sales In 2009

Sales of books totaled \$23.9 billion in 2009, a 1.8% decrease from the prior year, according to the Association of American Publishers. However, sales were up 1.1% year over year since 2002.

The most promising sector in 2009 was e-books, with sales up nearly 200%, and as additional e-readers and

portable reading devices enter the market, the category will continue to grow. Another bright spot was adult hardbound books, with sales up 7%. The category posted a 13% decline in 2008, a downturn attributed to the recession.

**SALES OF BOOKS, BY CATEGORY, 2009**  
(In thousands of dollars)

CATEGORY	SALES	CHANGE '09 VS. '08
Trade total	\$8,067,524	-0.1%
Adult hardbound	\$2,604,159	6.9%
Adult paperbound	\$2,241,386	-5.2%
Juvenile hardbound	\$1,704,475	-5.0%
Juvenile paperbound	\$1,517,504	2.2%
Book clubs & mail order	\$588,461	-2.0%
Mass market paperback	\$1,042,143	-4.0%
Audiobooks	\$191,979	-12.9%
Religious	\$658,724	-9.0%
e-books	\$313,167	176.6%
Professional	\$3,357,022	-2.9%
K-12 education	\$5,237,976	-13.8%
Higher education	\$4,264,543	12.9%
All other	\$134,167	-20.6%
<b>TOTAL</b>	<b>\$23,855,706</b>	<b>-1.8%</b>

SOURCE: Association of American Publishers

SOURCE: "Estimate of Total Book Sales 2009," Association of American Publishers, Tina Jordan, 71 Fifth Ave., 2nd Fl., New York, NY 10003; 212-255-0200, x263; www.publishers.org.

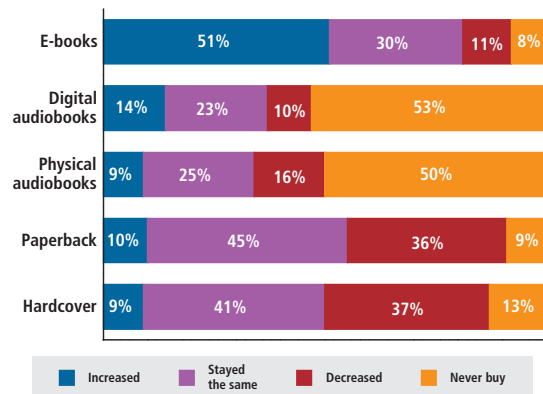
## E-Books Are Poised To Shake Up The Print World

Electronic editions of books account for a mere 5% of dollar sales of books in 2010, up from 1.5% in 2009, according to Book Industry Study Group (BISG) and R.R. Bowker. It is a small proportion, however, it is on the cusp of substantial growth as an increasing number of Americans embrace e-readers. BISG attributes the increase between 2009 and 2010 to the popularity of e-readers as holiday gifts, and it expects the devices to be even more common in 2011.

A slight majority of avid readers (51%) have increased their purchase of e-books in the prior year, which is about four times the number who increased their purchase of physical book formats. Meanwhile, physical book formats suffered, with more than a third reporting they decreased their purchase of hardcover and paperback books.

Since book buyers acquired their first e-book, 15% buy only e-books, unless there is not an e-book version available, and 9% buy only e-books even if there is no e-book version. A quarter (25%) buy mostly e-books, 17% have no preference, and 19% say it depends on the book. Only 8% buy only print books. In fact, 32% of avid readers would wait up to

**TRENDS IN AVID READERS' PURCHASES OF PHYSICAL AND DIGITAL BOOKS OVER THE PRIOR YEAR, 2010**



SOURCE: Book Industry Study Group & R.R. Bowker

three months to buy the e-book edition rather than the hardcover edition of a new title, compared to 21% who would succumb and buy the hardcover, and 9% who would buy both versions.

The most common reasons readers prefer e-books on e-readers is because they are portable (2.67, on a scale from 0 to 3 where 0 is no benefit to 3 is high benefit), offer instant access to books (2.62), can carry multiple titles on one device (2.61), have access to a large selection of e-books (2.58), and can take advantage of the low cost of e-books compared to print books.

SOURCE: "Consumer Attitudes Toward E-Book Reading," Book Industry Study Group, Angela Bole, 370 Lexington Ave., #900, New York, NY 10017; 646-336-7141; angela@bisg.org; www.bisg.org. Pricing: See the BISG website for pricing tiers.

## E-Reader Owners Read More, Buy More Books

Fewer than one in 10 Americans (8%) use an e-reader, according to Harris Interactive. Those who live in the East (14%) are significantly more likely than all other regions to own an e-reader.

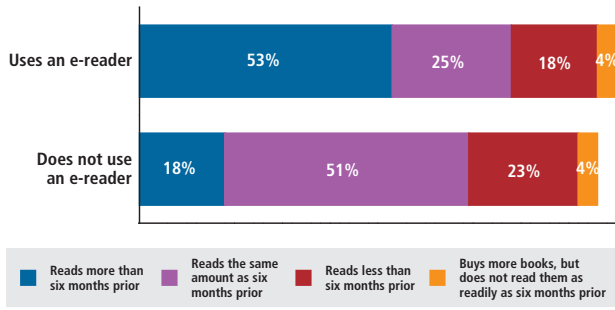
Those with e-readers consume more literature than those without. Four in 10 Americans overall (40%) read more than 10 books a year, including 19% who read more than 20 books a year. Among those with e-readers, 62% read more than 10 books a year, including 26% who read more than 20 books.

Those with e-readers are more likely than those without to buy books: only 8% of e-reader owners did not buy a book in the prior year, compared to 21% of Americans overall. More than a third of e-reader owners (37%) bought more than 10 books in the prior year, compared to 22% of those without such a device.

Among those who do not have an e-reader, 12% say it is likely they will get one in the next six months. Those in the West (16%) and East (14%) are more likely than those in the

South (12%) and Midwest (7%) to say they are likely to buy. Although Echo Boomers, aged 18-33, are rapidly adopting other technology, they (11%) are less likely than Gen Xers, aged 34-45 (15%), and Boomers, aged 46-64 (14%), to plan to buy an e-reader. Matures, aged 65 and older (7%), are the least likely planning to buy one.

**AMERICANS' READING HABITS,  
E-READER OWNERS VS. NON-OWNERS, 2010**



**SOURCE:** Harris Interactive

**SOURCE:** "Harris Poll: E-Readers," Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

## factoids

- ▶ A third of travelers (33%) **plan to take more trips** in the coming year than they did in the prior year, up from 28%; only 14% plan to cut back on travel, down from 20%. (*Decision Analysts'* phone: 415-716-7983)
- ▶ Eight in 10 moms who are planning a **family vacation** in 2010 (80%) say their family will have to make sacrifices to afford the trip; most commonly, they will eat out less often to save money (42%). (*WhyMomsRule.com*; phone: 615-327-1189)
- ▶ Support for **high-speed rail** has declined to 88% of Americans who are open to using such transit for long-distance travel within the U.S., down from 94% the prior year. (*America THINKS*; phone: 816-527-2383)
- ▶ As of February 2010, 56% of Americans were planning to take a **leisure trip** in the next six months, and 15% were planning to take a business trip. (*YPartnership*; phone: 407-875-1111)
- ▶ Air travelers top **complaints about flights** are the lack of leg room (25%) and baggage fees (25%). (*TripAdvisor.com*; phone: 617-670-6759)
- ▶ In preparation for a **vacation**, 55% of travelers buy new clothes, 53% get a haircut, 25% go on a diet, and 14% undergo professional body hair removal. (*TripAdvisor*; phone: 415-829-8158)
- ▶ A majority of workers (56%) feel more **in need of a vacation** in 2010 than they have in the past, and 36% feel more comfortable taking a vacation based on improvement in the economy. (*CareerBuilder*; phone: 773-527-3637)
- ▶ One in 10 travelers (10%) have used a **hotel** application on their smartphone to manage their reservations, access their loyalty program account, pay a bill, or check in or out of the hotel. (*Deloitte*; phone: 212-492-4408)

### FAST FACTS:

#### E-Readers

- ▶ 86% of e-reader owners use their devices at least once a week.
- ▶ 51% use their devices daily.
- ▶ E-reader owners read an average of 2.6 books a month, compared to an average of 1.9 books a month read by those who do not have an e-reader.

**SOURCE:** Marketing And Research Resources, 7101 Guilford Dr., #101, Frederick, MD 21704; 240-575-7100; www.m-rr.com. Price: Call for information.

### FAST FACTS:

#### Crafting

- ▶ 56% of households worked on at least one craft project in 2009.
- ▶ At \$27.4 billion, total spending on crafting was essentially flat compared to 2008. Americans spent the most on scrapbooking (\$2.4 billion), home decor painting and accessories (\$2.2 billion), and woodworking (\$1.5 billion).
- ▶ Top motivations for crafting are a sense of accomplishment and relaxation.

**SOURCE:** Craft & Hobby Association; 201-835-1224; www.craftandhobby.org.

- ▶ Men (46%) are more likely than women (34%) to be certain they will take a **vacation** in the 2010 summer season. (*Ipsos Public Affairs*; phone: 612-205-4733)
- ▶ Two thirds of business travelers aged 25-34 (65%) **update their Facebook pages** to let their friends and contacts know where they are, and 40% tweet about their business trips; by comparison, 40% of business travelers overall use hotel wi-fi to access Facebook. (*Omni Hotels & Resorts*; phone: 972-871-5625)
- ▶ Most families (77%) will take a **road trip** during the summer, and 60% of moms sing songs with their children while in the car to keep them entertained and occupied. (*Rayovac*; phone: 608-275-3340)
- ▶ A quarter of Americans (25%) expect to spend **three or more weeks traveling** in 2010, with a third (33%) planning to spend upwards of \$1,200 in the process. (*GfK*; phone: (011) +49 911-395-3606)
- ▶ The vast majority of Americans (84%) have a hard time finding fun, affordable **summer activities**. (*Dave & Buster's*; phone: 214-357-9588)
- ▶ Most pet owners (61%) have **traveled with their pet** in the past year, with 5% saying they always bring their animals on trips. (*TripAdvisor*; phone: 415-829-8158)
- ▶ Chicagoans (55%) are more likely than Americans overall (51%) to skip taking a **summer vacation** in 2010. (*Citi*; phone: 212-559-0486)
- ▶ More than a third of Americans (36%) plan to **take a trip** in Fall 2010, with 42% of travelers saying it will be their biggest trip of the year; most of those planning a fall trip (54%) will visit an urban city. (*TripAdvisor*; phone: 415-829-8158)
- ▶ More than seven in 10 air **travelers** (71%) experience anxiety when they travel; they most commonly are anxious due to waiting for their flight (75%) and passing through security (68%). (*Case Logic*; phone: 303-652-4338)



- **Consumer complaints** to the U.S. Department of Transportation rose 32% in the past year to 8,797. (*U.S. Department of Transportation; phone: 202-366-4000*)
- When Americans are on **vacation**, the majority would rather see a sunset than a sunrise (66%), try new food than stick to what they regularly eat (66%), allow for spontaneity than stick to a structured schedule (60%), and get up early than sleep in (55%). (*Ipsos; phone: 646-313-6117*)
- The state with the highest **hotel room rates** is New York, where travelers spend an average of \$193 per night; the state with the lowest room rates is in Kansas, where travelers spend an average of \$84 per night. (*Hotels.com; phone: 469-335-8442*)



# work

High rates of unemployment continued into 2010, with four in 10 unemployed workers being out of a job for half a year or longer.

Despite the bleak economy, most workers who were laid off in 2009 were able to find new full-time jobs in 2010, with most making the same or more money as at their previous job.

The number of workers who searched for a new job online surpassed the number who searched newspaper classifieds.

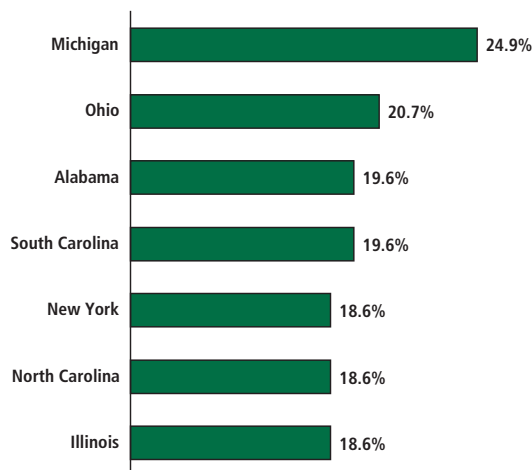
It is no surprise that the employed feel less secure in their jobs than they have in the past. Many have taken on additional tasks to compensate for layoffs, which is affecting their sense of work/life balance. The number of workers who appreciate their jobs has fallen, and employee morale is low. More than half would consider changing careers if the opportunity were to arise.

## Most Emerging Majority Workers Lack 'Good Jobs'

There were 15.7 million unemployed workers in the U.S. in December 2009, according to the Economic Policy Institute. That amounted to 6.3 unemployed workers per available job, up from 1.7 in October 2007.

Emerging majorities are less likely than Whites to have "good jobs" — defined as a job with a salary that would provide 60% of the income that would support a family, health insurance, and retirement benefits. Nearly a third of Whites (31.5%) have good jobs, compared to 28.1% of Asians, 21.8% of Blacks, and 14.4% of Hispanics.

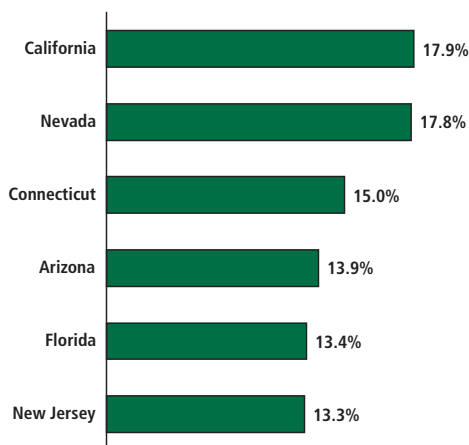
STATES WITH THE HIGHEST RATE OF UNEMPLOYMENT AMONG BLACKS, 2010 (PROJECTED)



NOTE: Among 18 states with Black populations large enough to generate projections.

SOURCE: Economic Policy Institute

STATES WITH THE HIGHEST RATE OF UNEMPLOYMENT AMONG HISPANICS, 2010 (PROJECTED)



NOTE: Among 12 states with Hispanic populations large enough to generate projections.

SOURCE: Economic Policy Institute

SOURCE: Economic Policy Institute, Karen Conner, Assistant Communications Director, 1333 H St. NW, #300, East Tower, Washington, DC 20005; 202-775-8810; kconner@epi.org; www.epi.org. Price: Available online at no charge.

## Laid Off Workers Find New Employment

More than half workers who were laid off in the prior year (58%) have found new jobs, reports CareerBuilder, with 51% securing full-time jobs, and 7% part-time work. Of those who found new jobs:

- ▶ 61% are making the same or more money;
- ▶ 51% are working in a different field;
- ▶ 26% needed to relocate to find work; and
- ▶ 22% got their job through a personal referral, whereas 21% used an online job board.

SOURCE: "Survey of Workers Who Were Laid Off, November 2009," CareerBuilder.com, Richard Castellini, VP Consumer Marketing, 8420 W. Bryn Mawr Ave., #1000, Chicago, IL 60631; richard.castellini@careerbuilder.com; www.careerbuilder.com.

## BLS Statistics: Who Are The Unemployed?

As of February 2010, 14.8 million Americans were unemployed (or 9.7%), according to the Bureau of Labor Statistics, up from 12.7 million the year prior (or 8.2%). Unemployment among men aged 20 and older grew to 10.0%, while unemployment among women rose to 8.0%. A quarter (25.0%) of working aged teens (aged 16-19) were unemployed, up from 21.8% the year prior.

The unemployed included:

- ▶ Those who lost their jobs (9.6 million, up from 7.9 million);
- ▶ Those who chose to leave their jobs (866,000, up from 820,000);
- ▶ Those who recently re-entered the workforce (3.5 million, up from 2.9 million); and
- ▶ Those who entered the workforce for the first time (1.2 million, up from 1.0 million).

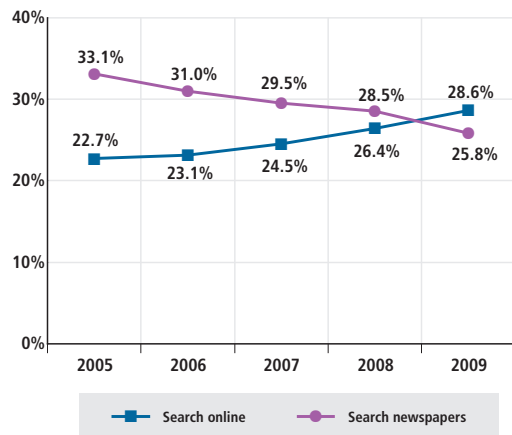
More than four in 10 unemployed workers (40.9%) had been out of work for 27 weeks or more, 18.1% for 15-26 weeks, 22.8% for 5-14 weeks, and 18.3% for fewer than five weeks.

SOURCE: "Employment Situation: Household Data, February 2010," Bureau of Labor Statistics, Division of Labor Force Statistics, 2 Massachusetts Ave. NE, #4675, Washington, DC 20212; 202-691-6378; www.bls.gov. Price: Available online at no charge.

## More Job Hunters Search Online Rather Than In Newspapers

The proportion of Americans who regularly review postings on job classified websites (28.6%) surpassed the proportion who regularly review classifieds in newspapers (25.8%) in 2009, according to The Media Audit. Online job seekers in every market are different. For example, in Ann

### AMERICANS WHO REGULARLY REVIEW JOB CLASSIFIEDS POSTED ONLINE VS. IN NEWSPAPERS, 2005-2009



SOURCE: The Media Audit

Arbor, MI, 28% of online job seekers have an advanced college degree, compared to 11% in Orlando, FL. In Orlando, job hunters are most often looking for work in computer information processing or fine arts, whereas in Ann Arbor, they are seeking work in hotel/lodging services or the banking industry.

The metro areas with the greatest proportion of online job hunters are:

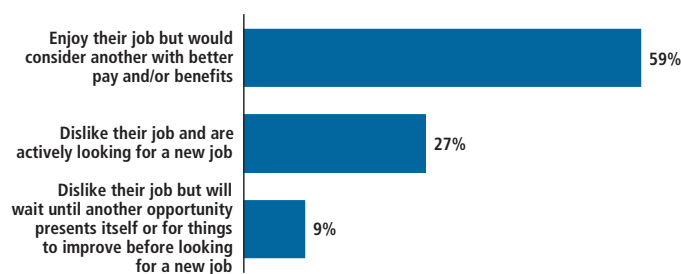
- ▶ Ann Arbor, MI (39.1%);
- ▶ Orlando, FL (36.7%);
- ▶ Raleigh-Durham, NC (35.3%);
- ▶ Salt Lake City, UT (35.0%);
- ▶ Atlanta, GA (34.8); and
- ▶ Reno, NV (34.8%).

SOURCE: "2009 National Report," The Media Audit, Robert Jordan, President, 10333 Richmond Ave., #200, Houston, TX 77042; 800-324-9921; rjordan@themediiaudit.com; www.themediiaudit.com. Price: Call for information.

## The Grass Is Always Greener At Another Job

The vast majority of workers (95%) do not expect to work in the same job for the rest of their careers, according to

### WORKERS' ATTITUDES TOWARD FINDING A NEW JOB, 2010



SOURCE: Spherion

Spherion Staffing Services. In fact, although most workers enjoy what they are doing, they would consider another job with better pay and/or benefits.

The recession may have removed workers' rose-colored glasses: 62% feel less secure in their jobs, and 37% feel more negative about their job than they did prior to the recession. A slight majority (53%) have had to assume additional responsibilities or workload during the recession because coworkers were laid off. That might contribute to the sentiment of 57% of workers who say their company does not support their efforts to maintain a good work/life balance.

SOURCE: "Labor Day Workforce Survey," Spherion Staffing Services, Marli McCleary, 2050 Spectrum Blvd., Fort Lauderdale, FL 33309; 800-422-3819; marlimcleary@spherion.com; www.spherion.com.

## Retirement Can Wait, Say Older Workers

The most common reason workers over age 60 are putting off retirement? Because they cannot afford to stop working (72%), according to CareerBuilder. Women (76%) are more likely than men (68%) to delay retirement for financial reasons.

Other reasons this group is postponing retirement include:

- ▶ They enjoy their job and work environment and don't want to leave (71%);
- ▶ They need the health insurance and additional benefits provided by their employers (50%);
- ▶ They fear being bored in retirement (24%); and
- ▶ They enjoy feeling needed at work (15%).

SOURCE: "Retirement Survey," CareerBuilder.com, Richard Castellini, VP Consumer Marketing, 8420 W. Bryn Mawr Ave., #1000, Chicago, IL 60631; richard.castellini@careerbuilder.com; www.careerbuilder.com. Price: Available online at no charge.

## Workers Take Dim View Of Being Employed

In 2010, fewer than half of workers appreciate their job more due to the recession (39%), compared to 55% who felt that way in 2009, reports Adecco. In fact, only 17% are willing to work harder to avoid layoffs (down from 20%), and only 19% are willing to work longer hours (down from 21%). While 39% appreciate having a job at the beginning of the week, another 31% are indifferent.

Most workers (51%) would switch careers given the opportunity; Gen Xers in particular feel this way, with 56% longing for a different profession. Two in 10 Gen Xers affected by the recession (20%) are thinking about going back to school.

Workers' confidence in management has declined as the recession persists. Some 7% say the recession has positively impacted the management team at their work, but that is down slightly from 9% in 2009. One in 10 (10%) appreciate their boss more as the result of the recession, but that is down from 16% in 2009.

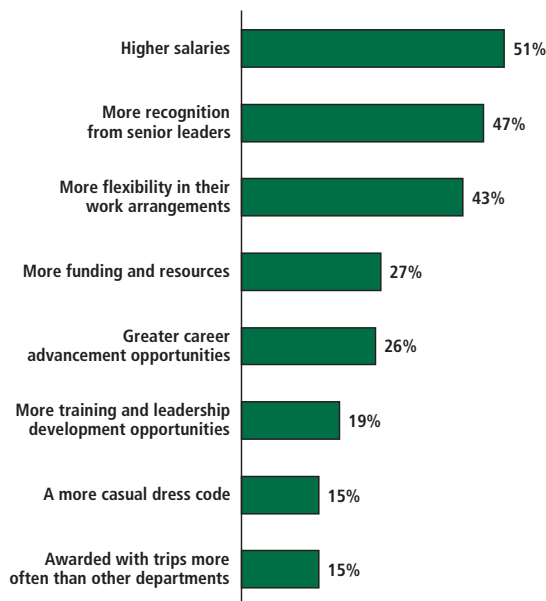
**SOURCE:** "Workplace Insights Survey," Adecco Group, Anthony Guerrieri, 175 Broadhollow Rd., Melville, NY 11747; 917-434-4296; anthony.guerrieri@adeccona.com; www.adeccona.com. Price: Available online at no charge.

## Favoritism Affects Employees' Morale

Nearly four in 10 employees (38%) claim there is departmental favoritism at their workplace, finds CareerBuilder. Sales departments (cited by 15% of workers) are most commonly believed to get preferential treatment, followed by human resources (11%), and accounting/finance (6%).

Such favoritism has an effect on employee morale. Nearly a quarter of workers (23%) say morale is low in their company.

**PERKS EMPLOYEES BELIEVE FAVORED DEPARTMENTS RECEIVE, 2009**



**SOURCE:** CareerBuilder

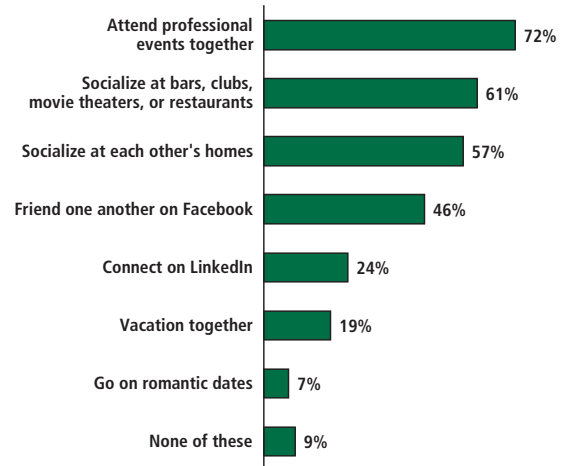
**SOURCE:** "Employee Morale Survey," CareerBuilder, Richard Castellini, VP Consumer Marketing, 8420 W. Bryn Mawr Ave., #1000, Chicago, IL 60631; richard.castellini@careerbuilder.com; www.careerbuilder.com.

## Workers Enjoy Friendships With Colleagues, But Managers Discourage Fraternization

More than a third of workers (38%) have colleagues they consider friends and with whom they interact outside of work, according to Ipsos. Women (42%) are more likely than men (34%) to have such workplace friendships.

Some 45% of women say their families know their friends from work, compared to 34% of men. A third of women (33%) discuss personal matters with their work friends, compared to 26% of men. Men (42%) are more likely than women (32%) to say it is smarter to keep their work lives and personal lives separate.

**ACTIVITIES THAT WORKERS SAY ARE ACCEPTABLE FOR COWORKERS TO DO TOGETHER, 2010**



**SOURCE:** Ipsos

Fewer than half of managers (49%) and non-managers (29%) support the development of such friendships among coworkers. However, most employees say that such friendships create a more supportive workplace (70%), increase teamwork (69%), improve morale (56%), and enable sharing of knowledge and open communication.

**SOURCE:** "Workplace Friendships," Ipsos, Nicolas Boyon, SVP, 1700 Broadway, 15th Fl., New York, NY 10019; 646-364-7583; nicolas.boyon@ipsos.com; www.ipsos-na.com.

## Teens Compete Against Each Other For Summer Jobs

Managers responsible for hiring summer staff say the top obstacle for teens looking for a summer job is another teen who is also looking for work, according to SnagAJob.com. Overall, the majority of managers (53%) think it's difficult for teens to find summer jobs.

The primary attribute managers look for in seasonal employees is a positive attitude (36%), followed by schedule flexibility (27%), and previous experience (23%). They also advise teens to turn off their cellphone and refrain from texting during interviews.

**SOURCE:** SnagAJob.com, Shawn Boyer, CEO, 4880 Cox Rd., #200, Glen Allen, VA 23060; 804-236-9934; www.snagajob.com.

## Americans' Top Office Offenses

Only one in eight workers (13%) do not encounter any pet peeves during the workday, according to Ipsos. The most common annoyance is people with poor time management skills, cited by 43%. Within that category, workers complain about others who:

- ▶ Take long breaks for lunch, to smoke, or surf online (22%);

- ▶ Abuse sick days (11%);
- ▶ Host meetings without structure or an agenda (11%);
- ▶ Hold meetings that start late or run over (10%);
- ▶ Are distracted on their BlackBerry or text during a meeting (10%); and
- ▶ Miss deadlines (9%).

Those who have issues with coworkers most commonly resolve them by speaking with the offending party (29%). One in 10 (10%) vent to a coworker, and 9% take up the issue with their boss or supervisor. Only 1% leaves an anonymous note. More than a quarter (27%) do not deal with the situation at all.

#### WORKERS COMPLAINTS ABOUT THEIR COWORKERS' HABITS, 2010

Poor time management . . . . .	43%
Gossip . . . . .	36%
Messy community spaces . . . . .	25%
Loud noises (talking, speaker phone, cell ringtones) . . . . .	21%
Potent scents (perfume, food, smoke) . . . . .	20%
Use of personal electronics in meetings . . . . .	15%
Political conversations . . . . .	12%
Misuse of email . . . . .	12%
Personal use of social media sites . . . . .	12%

**SOURCE:** Ipsos

**SOURCE:** "Workplace Pet Peeves," Ipsos, Nicolas Boyon, SVP, 1700 Broadway, 15th Fl., New York, NY 10019; 646-364-7583; nicolas.boyon@ipsos.com; www.ipsos-na.com. Price: Available online at no charge.

## Fewer Workers Say 'Gimme A Break' At Lunch

The "lunch hour" isn't an hour for most workers, according to CareerBuilder. A third (32%) take less than a half hour for lunch, 5% take less than 15 minutes, and 10% never take a lunch break. One in six (16%) work right through their lunch hour. Nearly one in five (18%) typically do not leave their desks and eat in their office each day of the week.

The recession has affected workers' lunch habits. Nearly half (47%) have been packing lunch more often than they used to in order to save money or to eat healthier.

The recession is also taking its toll on smokers, with 44% more likely to quit because of the cost of their habits. More than one in five (21%) are taking fewer smoke breaks during the work day, and 20% have quit all together.

Most workers who smoke take three smoke breaks a day (70%), and another 12% take upwards of five breaks a day. The majority (78%) say their smoke breaks last up to ten minutes each.

**SOURCE:** CareerBuilder, Richard Castellini, VP Consumer Marketing, 8420 W. Bryn Mawr Ave., #1000, Chicago, IL 60631; richard.castellini@careerbuilder.com; www.careerbuilder.com.

## factoids

- The average number of years a male worker stays in the **same job** is 5.2, down from 5.9 years in 1983; among women, the average tenure is 4.9 years, up from 4.2 over the same period. (*Employee Benefit Research Institute; phone: 202-775-6356*)
  - The vast majority of those who suffer from an excessive sweating disorder (86%) are fearful of going on **job interviews**, and 27% avoid them all together. (*International Hyperhidrosis Society; phone: 302-650-4781*)
  - One in seven men (15%) and one in 10 women (10%) have sabotaged a **co-worker** out of jealousy. (*Harlequin; phone: 416-445-5860*)
  - Of the 53% of workers who have had a crush on a coworker, only 36% have had an **office romance**; 73% of workers believe that workplace relationships jeopardize one's opportunities for advancement. (*Spherion; phone: 800-422-3819*)
- 
- HOW WORKERS MULTITASK DURING THEIR LUNCH HOUR, 2010**
- |                                  |     |
|----------------------------------|-----|
| Hanging out with coworkers ..... | 23% |
| Running errands .....            | 18% |
| Doing work .....                 | 16% |
| Walking .....                    | 10% |
| Shopping .....                   | 7%  |
| Working out .....                | 3%  |
- SOURCE:** CareerBuilder; phone: 773-527-2437
- 
- More than a quarter of Gen Y workers (26%) are nervous about the stability of their **jobs**, and 27% say they enjoy their jobs less than they did in the prior year, up from 16% in 2009. (*Adecco Group; phone: 917-434-4296*)
  - More than two in 10 workers (21%) check their **smart-phones** every time the device rings or vibrates; 18% say their company requires them to be available outside of work; and 14% feel obligated to constantly be in touch with work during the recession. (*CareerBuilder; phone: 773-527-2437*)
  - Of the 45% of workers who participate in **office pools**, they most commonly bet on the Super Bowl (68%), the men's NCAA basketball tournament (56%), and the lottery (34%). (*Spherion; phone: 800-422-3819*)
  - Nearly six in 10 **teachers** (59%) are very satisfied with their choice of profession, compared to 17% who say it is likely they will leave teaching within two years. (*MetLife; phone: 401-827-3236*)
  - More than four in 10 **office workers** (42%) have stolen supplies from a coworker's desk; while most simply forgot to return the items they borrowed, 23% purposely kept them because they believed their coworker had done the same to them. (*OfficeMax; phone: 630-864-6066*)

### ➤ PEOPLE WHO HAVE GIVEN WORKERS POOR CAREER ADVICE, 2009

A co-worker .....	58%
A boss .....	54%
Parents/relatives .....	35%
Spouse/significant other .....	30%
A mentor .....	21%
None of these .....	25%

**SOURCE:** The Createive Group; phone: 650-234-6104

More than half of **working moms** (52%) would stay home with their children if they had the means to do so; 30% are the sole breadwinners for their families. (*Adecco; phone: 917-434-4296*)

- A slight majority of **workers who were laid off** in the prior three months (51%) have found new positions; most (61%) had to take a pay cut, though 39% were able to find a better-paying job. (*CareerBuilder; phone: 773-527-1164*)
- Nearly a quarter of **hiring managers** (22%) say candidates are using unusual tactics to get their attention when sending in resumes and during interviews, up from 12% in 2008. (*CareerBuilder; phone: 773-527-2437*)
- Two thirds of **office workers** aged 22 to 29 (66%) feel more confident in social situations than professional situations. (*Dentyne/Cadbury; email: katharine.beyer@cadbury.com*)
- Nearly a quarter of workers (24%) plan to **work from home** at least a few days during the summer; men (28%) are more likely than women (19%) to enjoy such flexibility. (*Adecco Group; phone: 917-434-4296*)
- A handshake may seal the deal when a company **hires** a new employee, but a weak handshake (cited by 26% of hiring managers) is less likely than poor eye contact (67%) or bad posture (33%) to negatively affect their decision to hire a candidate. (*CareerBuilder; phone: 773-527-2437*)
- Nearly all workplace safety officials (98%) have witnessed workers not wearing **required protective gear** while on the job, with workers most commonly saying the reason for their non-compliance is that the gear is uncomfortable (40%). (*Kimberly-Clark; phone: 770-587-8048*)

### ➤ MOST COMMON ERRORS POTENTIAL HIRES MAKE DURING INTERVIEWS, ACCORDING TO EXECUTIVES, 2010

Dressing inappropriately .....	57%
Appearing disinterested .....	55%
Speaking negatively about a current or previous employer .....	52%
Appearing arrogant .....	51%
Answering a cell phone or texting during the interview .....	46%
Not providing specific answers .....	34%
Not asking good questions .....	34%

**SOURCE:** CareerBuilder; phone: 773-527-2437



#### ISSUES EMPLOYEES FACE WHEN RETURNING TO THE WORKFORCE, 2009

Becoming acclimated to new culture/coworkers	32%
Learning new technologies/protocols	23%
Adapting to a new routine/schedule	22%
Building their professional confidence	10%
Other/don't know	13%

SOURCE: OfficeTeam; phone: 650-234-6289

- ▶ Three in 10 workers (30%) who **called in sick** worked from home; similarly a third of workers who took vacation checked in with work while they were away. (*Spheerion Staffing Services*; phone: 800-422-3819)
- ▶ Nearly three fourths of workers (74%) do not like that they spend so much time **sitting at work**; women spend an average of 27 hours a week sitting in front of a computer or mobile device, compared to 23 hours for men. (*Ipsos*; phone: 646-364-7583)

#### WOMEN'S CAREER DESIRES, 2009

Work that makes a positive impact on society	89%
Opportunity to develop professional expertise	85%
Good work/life balance	80%
Opportunity to express and act in line with their values	79%
Opportunity for meaningful advancement	76%

SOURCE: Simmons College; phone: 617-521-2369

- ▶ Nearly a third of workers (31%) believe they could do their **boss's job** better than he or she does it, and 60% do not believe their boss could do their job as well as they do. (*CareerBuilder*; phone: 773-527-2437)
- ▶ A slight majority of workers (53%) would stay in their **current job**, even if offered a better job elsewhere, and 80% expect to still be working at their current place of employment in a year. (*GfK Custom Research*; phone: 212-240-5300)
- ▶ Nearly nine in 10 **workers** (89%) are confident their paycheck is accurate. (*American Payroll Association*; phone: 210-226-4600, ext. 2277)
- ▶ One in six **unemployed workers** (17%) received a job offer since becoming unemployed, but 92% rejected the offer, most commonly because the pay was too low compared to their previous salary (cited by 54%). (*CareerBuilder*; phone: 773-527-1164)
- ▶ Three in 10 **office managers** (30%) say their jobs have been more stressful than in the previous year, compared to 11% who say their stress is less. (*OfficeTeam*; phone: 650-234-6289)
- ▶ Managers say it takes an average of nine weeks to determine if a **new hire** is a good fit for their role within a company. (*The Creative Group*; phone: 650-234-6277)

- ▶ A majority of Americans (58%) would consider taking a **part-time job** to supplement their income. (*Pampered Chef*; phone: 630-792-7610)

- ▶ More than a quarter of employers (27%) say they have noticed an increase in employee **sick days**, which they attribute to a higher rate of stress and burnout due to the economy. (*CareerBuilder*; phone: 773-527-1164)
- ▶ Nearly a third of office managers (31%) do not take any additional **vacation days** — aside from employer-provided vacation time — between Thanksgiving and New Year's, and 25% only take an extra day or two; fewer than a quarter (25%) take an additional week or more. (*OfficeTeam*; phone: 650-234-6289)

#### REASONS WORKERS HAVE CONSIDERED QUITTING THEIR JOBS UPON RETURNING FROM SUMMER VACATIONS, 2010

Lack of communication or involvement by upper management	40%
Lack of promotion despite good work results	37%
Being overworked	34%
Lack of company vision	31%
Belief that colleagues are incompetent	28%

SOURCE: AffectSolutions for Regus; phone: 212-398-9680



# youth

American youth have not changed fundamentally in the past few years: they are multicultural, tech savvy, engaged with causes, and always seeking entertainment. However, much like their parents, money weighs on their minds. Parents are using allowances and chores as a way to teach their children about budgeting and finances.

Despite their worries, young people remain optimistic, and expect to see and accomplish great things in their lifetimes.

Millennial children tend to have liberal viewpoints and are accepting of people's differences. Emerging majority children feel that their racial/ethnic heritage defines them as a person. Most kids say they make friends easily. Still, they believe that good looks are the key to popularity.

Playing with friends is still children's favorite leisure activity, but for this generation of children, that likely includes playing videogames. Most children consider themselves "gamers," and most teens have a gaming console. Driving and puzzle games are their favorite genres. Children's interest in gaming spikes around age nine, and they begin to spend their money on games instead of toys.

## Teens Spend Their Days Doing Typical Things: Sleeping, School, And Eating

There's little difference in how boys and girls 15-19 spend their time in a typical day, averaged over a full year, according to the Bureau of Labor Statistics. Nearly 10 hours are devoted to sleeping and three hours are spent on educational activities. Boys, however, spend one more hour a day on leisure and sports activities. Girls, interestingly, spend about 12 more minutes a day eating than their male counterparts.

Similarly, the data shows parents don't have a lot of time for themselves. As would be expected, those with children younger than age 6 spend the most time in a typical day taking care of household members, including children under age six (2 hours, 8 minutes), compared to those with children aged 6-17 (51 minutes) and adults without children (3 minutes).

Parents of young children also get the least sleep (8 hours, 30 minutes), compared to 8 hours, 41 minutes for adults without children. Parents spend more time working and doing work related activities (4 hours, 2 minutes, for parents of young children and 4 hours, 20 minutes, for parents of older children) than do non-parents (3 hours, 27 minutes).

**HOW 15-19-YEAR-OLDS SPEND A TYPICAL DAY,  
GIRLS VS. BOYS, 2009**  
(In hours:minutes)

	GIRLS	BOYS
Sleeping and personal care	10:21	10:38
Eating and drinking	1:12	1:00
Household activities	:86	:55
Buying consumer goods	:71	:38
Taking care of household members, siblings	:19	:18
Taking care of non-household members	:26	:26
Working, work-related activities	:98	1:10
Education (attending classes and homework)	3:49	3:06
Organizational, civic, religious activities	:25	:37
Leisure and sports	5:25	6:24
Telephone calls, mail, and email	:37	:27

NOTE: Time spent is an average of all 15-19-year-olds, whether they participate in the activity or not.

SOURCE: Bureau of Labor Statistics

SOURCE: "American Time Use Survey," U.S. Bureau of Labor Statistics, 2 Massachusetts Ave. NE, #4675, Washington, DC 20212; 212-691-6339; atusinfo@bls.gov; www.bls.gov/tus.

## Children's Lives And What They Expect To See In Their Lifetime

Children aged 3 to 12 say they get to spend enough time with their family, according to *Highlights for Children*. They most commonly cite playing games (39%) — whether make believe, board games, or video games — as their favorite family activity, followed by watching TV or movies (19%),

outdoor activities (14%), and cooking or eating together (10%).

Most kids have living grandparents. Of those who do, 49% keep in touch with them by telephone, and 39% visit their grandparents or their grandparents visit them. About 6% text or email, and a few with particularly tech-savvy grandparents (3%) talk with them via Skype or another Voice over Internet Protocol.

Children are aware of world issues, and the most common problems they would change are pollution (11%), ending war (10%), and to better protect animals (9%). Some 4% of children were concerned about the oil spill in the Gulf. Children in the Northeast (19%) and West (14%) are more likely than average to be concerned about pollution, while those in the Southeast (12%) and South Central (10%) are more concerned than average about money issues.

In regard to their own lives, children most want to change their bedtime to a later hour (22%). They also commonly would like to change the rules related to having to clean up (9%), and what and where they can eat (9%). One in 10 kids (10%) think that all of their parents' rules were fair and wouldn't make changes, while 4% think they should be able to live without any rules.

Looking to the future, 18% of children expect to have flying cars within their lifetime. In fact, 27% of the inventions they think they will see in years to come are related to cars with special features or new technologies. More than a third of children believe they will visit space in their lifetimes, with boys (44%) more likely than girls (32%) to say so.

SOURCE: "State Of The Kid, 2010," *Highlights for Children*, Christine French Clark, Editor in Chief, 1800 Watermark Dr., Columbus, OH 43215; 614-486-0631; www.highlights.com. Price: Available online at no charge.

## Kid Insight: Their Favorite Activities, Bedtime, And Allowance

Six in 10 children age 3-12 receive an allowance, most commonly between \$3 and \$5 per week, according to *Highlights for Children*. Nearly all (92%) have chores in order to receive their money. Kids living on the West coast are most likely to receive an allowance, while kids living in the North central part of the U.S. are the least likely.

Children's favorite activity with their parents is to play — videogames, make-believe, or board games. Kids also enjoy

### TOP CAREER ASPIRATIONS, BOYS AND GIRLS, 3-12, 2010

BOYS	GIRLS
1. Athlete/coach	1. Veterinarian/Work with animals
2. Doctor	2. Teacher
3. Scientist	3. Artis
4. Engineer	4. Singer
5. Public safety	5. Doctor

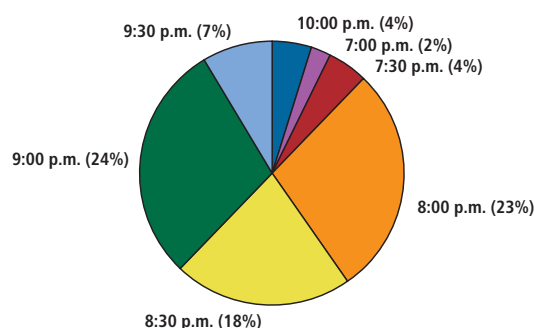
SOURCE: *Highlights for Children*

watching TV or movies with their parents and spending time outdoors.

The most common bedtime on school nights is 9 p.m. for 9-12-year-olds, with 8 p.m. as the most likely time for 3-8-year-olds. Bedtime is the key complaint among kids today, with the largest number (22%) wishing their parents would allow them to stay up later. One in 10 (10%) think all of their parents' rules are fair and would not change any of them, but 9% would change rules about cleanliness or where and when they eat. Some 4% want to live without any rules.

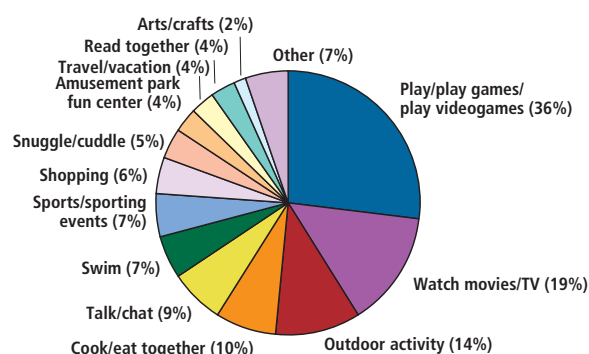
Grandparents are a key presence in the lives of today's kids, with nearly half of those with living grandparents (49%) regularly talking with their grandparents via the telephone. Four in 10 (39%) visit with them in person. And kids are more likely to write an old-fashioned letter than send their grandparents an email.

KIDS' AGE 3-12 WEEKNIGHT BEDTIME, 2010



SOURCE: *Highlights for Children*

KIDS' AGE 3-12 FAVORITE FAMILY ACTIVITY, 2010



SOURCE: *Highlights for Children*

SOURCE: "State of the Kid 2010," Highlights for Children, Patricia Mikelson, 1800 Watermark Dr., Columbus, OH 43215; 614-324-7003; pmmikelson@highlights-corp.com; www.highlights.com; www.stateofthekid.com.

## Parents Use Allowance To Teach Kids Finance

The vast majority of parents of children aged 6-16 (91%) plan to teach their children about financial responsibility in 2010, reports American Express. The most common lessons they will focus on include:

- ▶ Understanding debt and its impact on spending and saving (30%);
- ▶ The value of a dollar through a rewards system, such as an allowance (25%); and
- ▶ How money is earned and used in everyday life (21%).

Nearly two thirds of parents (62%) give their children allowances, averaging \$12 per week. Of those, 47% of parents expect that the child's allowance will be spent rather than saved. That breaks down to:

- ▶ 23% who do not put any restrictions on how their children are allowed to spend their allowances;
- ▶ 13% who give allowances for non-essentials, such as movie tickets, toys, or games; and
- ▶ 10% who expect their children to spend the money on essentials such as lunch.

Only 18% give their children an allowance specifically so it can be deposited into their savings account or saved in their piggy banks.

SOURCE: "Spending & Saving Tracker," American Express, Lisa Gonzalez, 200 Vesey St., New York, NY 10285; 212-640-2851; lisa.a.gonzalez@aexp.com; www.aexp.com.

## Financial Concerns, Future Weigh Heavy On College Students' Minds

College students are worried about their future due to economic issues, according to Harvard's Institute of Politics. They are concerned about being able to pay bills and meet their financial obligations (60%), affording a place to live (58%), paying for health care (56%), and losing their job (46% of those in the work force).

Nearly half (48%) are concerned about being able to stay in school, including 45% of four-year undergraduates and 64% of community college students. The vast majority (84%) believes it will be difficult to find a job after graduation, and only 11% think it will be easy. In 2006, 37% thought finding a job would be easy.

Fewer than half of college students (46%) believe they will be better off financially when they are their parents' age, compared to 11% who think they will be worse off, and 24% who think their situation will be the same. The remaining 19% were not sure or declined to answer.

SOURCE: "Financial Poll," Harvard Institute of Politics, Esten Perez, 79 John F. Kennedy St., Cambridge, MA 02138; 617-496-4009; www.iop.harvard.edu. Price: Available online at no charge.

## What Students Carry In Their Backpacks

Girls attending high school and college are twice as likely as their male peers to carry their cellphones and wallets inside their backpacks, according to Ypulse Research. Boys tend to carry these items in their pockets. However, boys are just as likely as girls to carry an MP3 player in their backpack.

Three in four male students (75%) and 50% of women students carry backpacks. One in three women (33%) prefer to use shoulder bags or fashion totes.

Pens, pencils, notebooks, and textbooks are the four most found items in a backpack. One in three boys (33%) and one in four girls (25%) carry a laptop computer and nearly half of all backpacks include a flash drive.

Girls are slightly more likely than boys to carry gum (50% vs. 33%) and granola bars (20% vs. 14%). One in three backpacks contain bottled water, and an additional 20% contain a reusable water bottle.

**SOURCE:** Ypulse Research, Dan Coates, President, 130 William St., 6th Fl., New York, NY 10038; 888-292-8855, x2; dan@ypulse.com; www.ypulse.com.

## Children Have Liberal Views, Value Their Ethnic Heritage

There are 74 million children under the age of 18 in the U.S., and that number will grow to 82 million by 2021, according to Nickelodeon. A slight majority is White (56%), 22% are Hispanic or Latino, and 14% are Black. [Ed: For more on the changing racial composition of the U.S., see "Census Update..." on p. 6.]

Black youth (52%) are the most likely to say that cultural beliefs and traditions define them, followed by 48% of Hispanic youth, and 38% of White youth.

Children are generally more liberal in their beliefs than are their parents:

- ▶ 71% of both children and parents approve of living together before marriage.
- ▶ 88% of children and 82% of parents approve of interracial marriage.
- ▶ 65% of children and 57% of parents approve of same-sex couples to raising children.
- ▶ However, 55% of children and 61% of parents say divorce is okay.

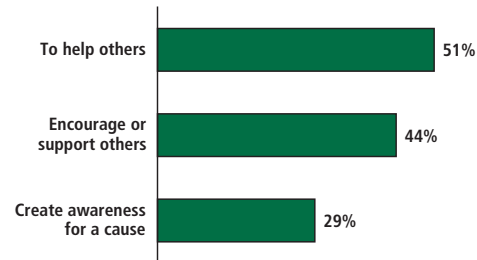
**SOURCE:** "A Portrait of Three Generations," Nickelodeon, Ron Geraci, SVP Research, 1515 Broadway, 37th Fl., New York, NY 10036; 212-846-1000; ron.geraci@nick.com; www.nick.com. Price: Call for information.

## Helping Hand: Teens Do Good With Social Nets

The vast majority of teens (88%) use social networking sites daily, including 70% who spend at least an hour or more on such sites each day, finds Junior Achievement and Deloitte. Most (58%) would consider the ability to access social networks at work when evaluating a job offer from a

potential employer. However, they do not consider the reactions of college admissions officers (40%), present or future employers (38%), or parents (30%) when they post something to a social network.

### HOW TEENS USE SOCIAL NETWORKS TO DO GOOD, 2009



**SOURCE:** Junior Achievement and Deloitte

**SOURCE:** "Teen Ethics Survey," Junior Achievement and Deloitte, Stephanie Bell, Director Marketing & Media Relations, 1 Education Way, Colorado Springs, CO 80906; 719-540-6171; sbell@ja.org; www.ja.org.

## Technology Is In Teen Boys' DNA

While both teen boys and girls spend a significant amount of time with technology, their interest in it varies widely by gender.

Boys aged 15-19 and girls the same age both believe technology makes them more organized, but boys are more likely than girls to enjoy discussing technology, to feel confident enough about their knowledge of technology to give advice on the topic, and to think technology is fun.

### TEENS OPINIONS OF TECHNOLOGY AND ELECTRONICS AS COMPARED TO THE 'AVERAGE' TEENAGER, BOYS AGED 15-19 VS. GIRLS AGED 15-19, 2009

	BOYS	GIRLS
Give others advice when they are looking to buy technology or electronics	44%	-23%
Often discuss technology or electronics with others	34%	-29%
Among the first of their friends to try new technology products	28%	-26%
Enjoy learning about technology or electronics from others	16%	-11%
When they find a technology product they like, they recommend it to people they know	16%	-2%
Are fascinated by new technology	10%	11%
Technology helps make them more organized	10%	6%
Want others to say "wow" when they see their electronics	7%	-14%
Think computers can be a good source of entertainment	4%	-4%

**NOTE:** For example, boys are 44% more likely than the average teen to give others advice on technology, while girls are 23% less likely than average to do so.

**SOURCE:** Mediamark Research & Intelligence

**SOURCE:** "2009 TeenMark Study," Mediamark Research & Intelligence, Anne Marie Kelly, SVP Marketing and Strategic Planning, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-884-9204; annemarie.kelly@mediamark.com; www.mediemark.com. Price: Call for information.

## Parents Want To Restrict Teen Driver Licenses

Most parents (53%) believe their child should have a restricted driver's license — limiting passengers and the hours they can drive — until the age of 18, according to the Insurance Institute for Highway Safety. In addition, 66% think their child should not have a learner's permit until they are age 16.

Among parents who are in favor of limiting nighttime driving, 50% believe young drivers should not be allowed to drive after 10 p.m., and an additional 29% believe the restriction should begin at 9 p.m. Among parents in favor of restricting passengers riding with young drivers, 38% believe they should not be allowed to transport any non-relative passengers, and 44% believe it should be restricted to one non-relative in the car.

Parents in the Northeast are more likely than average to be in favor of age restrictions on driver's licenses, with 88% saying a teen should not have a learner's permit until age 16 and 64% in favor of restricting driving privileges of those under age 17. Parents in the Midwest are less likely than average to be in favor of age restrictions, with 51% saying a teen should not have a learner permit until age 16, and 40% in favor of restricting driving privileges for those under age 17.

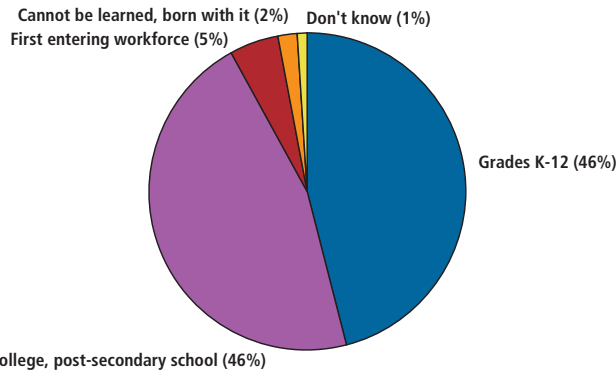
**SOURCE:** "Teen Driving Limits," Insurance Institute For Highway Safety, Adrian Lund, President, 1005 N. Glebe Rd., Arlington, VA 22201; 703-247-1500; publications@iihs.org; www.iihs.org.

## Teens Plan To Launch Their Own Companies In Hopes Of Controlling Their Destiny

The largest number of teens (26%) hope to start their own businesses as a way to control their own destiny, according to Junior Achievement. Two in 10 (21%) intend to start a company because they prefer to work for themselves rather than someone else, 15% believe it will enable them to raise money for causes they care about, and another 15% believe they can earn more money by running their own company.

While 51% intend to start their own business, they also have realistic expectations. Six in 10 (58%) believe starting a company will be difficult, but possible, while only 5% think it's going to be easy. Teens also admit there is more security in working for someone than in being an entrepreneur (49% vs. 47%).

### THE BEST TIME TO LEARN ENTREPRENEURIAL SKILLS, SAY TEENS



SOURCE: Junior Achievement

SOURCE: Junior Achievement, Stephanie Bell, Director Marketing & Media Relations, 1 Education Way, Colorado Springs, CO 80906; 719-540-6171; sbell@ja.org; www.ja.org.

## Economy Is Top Concern Among Teens

Although the economy shows modest signs of recovery, it remains the top concern among teens, according to C&R Research, speaking at the What Teens Want conference. The environment is notably not on their list, which C&R's Amy Henry attributes to perspective. "They worry about things that are harder to control than things that they have been trained to fix. They know they can do things to help the environment."

Teens have also been raised to voice their opinions, which has led to a feeling of entitlement, says Henry. They aren't satisfied with companies supporting causes, but they also feel they have a voice in what causes those companies support. She points to campaigns by Pepsi and Best Buy that are led by consumer directives.

### TEENS' TOP CONCERNS, 2010

Economy	59%
Cure for diseases	49%
Child abuse	47%
War	46%
Education	44%

SOURCE: C&R Research

SOURCE: C&R Research, Amy Henry, VP Youthbeat, 500 N. Michigan Ave., Chicago, IL 60611; 312-828-9200; ahenry@crresearch.com; www.crresearch.com.

## Teens Confident They Will Land Dream Jobs

Two in three teens (65%) are confident that one day they will land their dream job, according to Junior Achievement. However, 84% say they would forego the perfect job for the opportunity to make a difference in the world. More than seven in 10 (71%) would trade their dream job in exchange for a high salary, 52% in order to have decision-making responsibilities, 39% for one that offers challenges, and 32% would give up their dream job for a position that allows them to receive publicity and recognition.

### NECESSARY FACTORS THAT TEENS BELIEVE WILL ENABLE THEM TO LAND A GOOD JOB, 2010

Believing in themselves	93%
Good grades	93%
College/technical/vocational degree	92%
High school diploma	92%
Being a team player, effectively communicate, show leadership skills	90%
Participation in student business competitions, job shadow programs	81%
Extracurricular activities, including sports	79%
Being mentored, networking	64%

SOURCE: Junior Achievement

SOURCE: "2010 Kids and Careers Survey," Junior Achievement, Stephanie Bell, One Education Way, Colorado Springs, CO 80906; 719-540-6171; sbell@ja.org; www.ja.org.

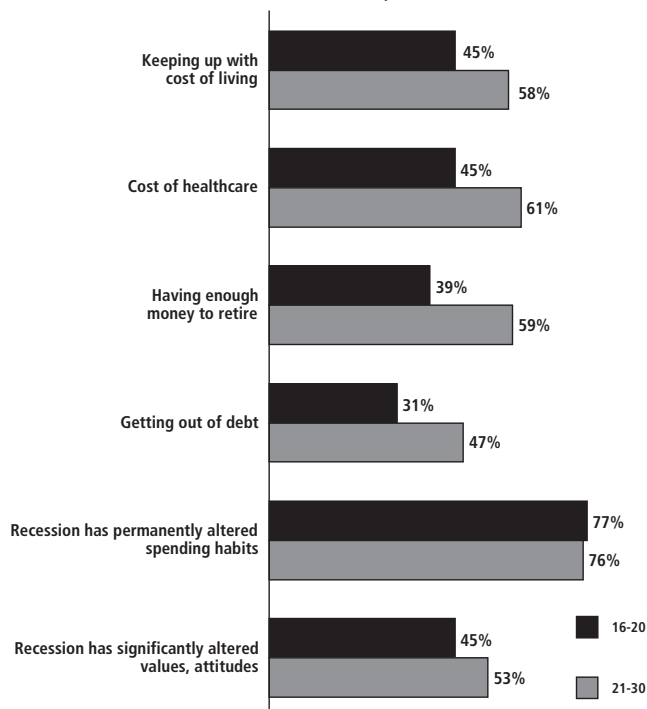
## Teens, Young Adults Want More Control And Are Willing To Pay More For It

Two in three 16-20-year-olds (65%) and 63% of those aged 21-30 believe that in order to be happy they must be in control of every aspect of their lives, according to Yankelovich.

This need to control also extends to the desire to control material items. 69% of 16-20-year-olds and 70% of 21-30-year-olds wish they had more opportunities to customize products to fit their lifestyles. Likewise, 43% of 16-20-year-olds and 40% of 21-30-year-olds are willing to pay more for these customizable products.



**CHIEF CONCERNS ABOUT THE ECONOMY, TEENS AND YOUNG ADULTS**



SOURCE: Yankelovich

SOURCE: Yankelovich, Emily Ross, Marketing Director, 400 Meadowmont Village Circle, #431, Chapel Hill, NC 27517; 919-932-8858; emily.ross@thefuturescompany.com; www.yankelovich.com.

**Teens Seek Difference, Not Similarity In Fashion**

Seven in 10 teens of both genders (70%) say that dressing fashionably is important to them, according to media mall advertiser the Eye and Arbitron. Teens are more than twice as likely to want to dress differently than their friends as to dress in similar styles.

**TEEN ATTITUDES ON FASHION, BEAUTY**

Dressing fashionably is important.....	70%
Hair is just as important as clothes.....	68%
Clothes form identity .....	62%
Always strive to look good .....	58%
Like to stand out by dressing differently than friends.....	52%
Have daily skin regimen.....	37%
Change fragrance choice frequently .....	36%
Enjoy trying new beauty products .....	30%
Label conscious .....	27%
Take fashion inspiration from celebrities .....	23%
Enjoy dressing like friends .....	20%

SOURCES: Arbitron, The Eye

SOURCES: Arbitron, Pierre Bouvard, President Sales and Marketing, 142 W. 57th St., New York, NY 10019; 212-887-1348; www.arbitron.com.

Eye, Michelle Schiano, VP Marketing, 747 Third Ave., 35th Fl., New York, NY 10017; 646-871-4430; www.eyecorp.com.

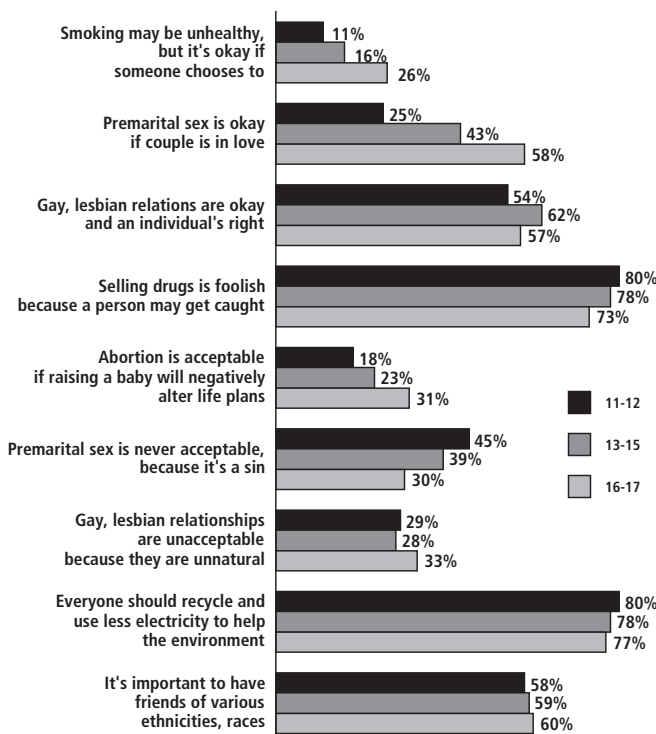
**Tweens, Teens More Accepting As They Age**

Girls aged 11-17 (59%) are much more likely than boys the same age (38%) to believe their friendships would not change if they discovered their close friend of the same sex was involved in a gay or lesbian relationship, according to Harris Interactive and the Girl Scouts of the USA. Similarly, girls are more likely than boys to be accepting of gay and lesbian relationships (65% vs. 54%).

The survey tracking values and beliefs among tweens and teens finds little difference between the genders on issues relating to smoking, suicide, selling drugs, and taking care of the environment.

There are slight differences among age groups. For instance, tweens aged 11-12 are much less accepting of smokers than those aged 16-17. Tweens are also more likely than those aged 16-17 to believe selling drugs is foolish, because a person may get caught. Older teens are more accepting of premarital sex and abortion than tweens.

**BELIEFS AND VALUES AMONG 11-17-YEAR-OLDS, BY AGE**



SOURCE: Harris Interactive, Girl Scouts of the USA

SOURCES: Girl Scouts of the USA, Joshua Ackley, Associate, 420 Fifth Ave., New York, NY 10018; 212-852-8038; jackley@girlscouts.org; www.girlscouts.org.

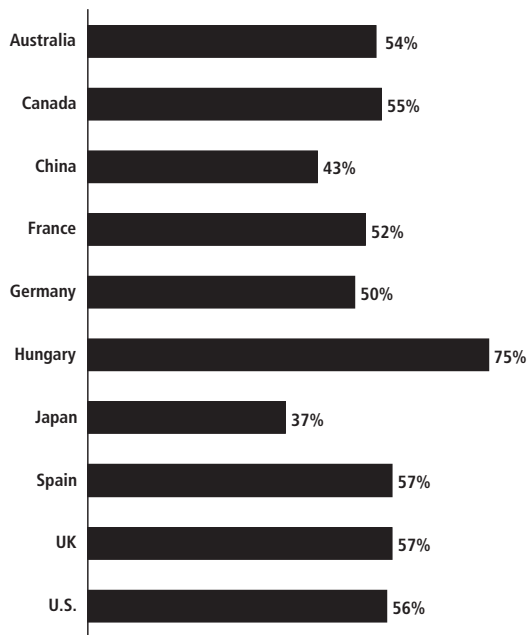
Harris Interactive, Humphrey Taylor, Chairman, the Harris Poll, 111 Fifth Ave., New York, NY 10003; 212-539-9600; htaylor@harrisinteractive.com; www.harrisinteractive.com.

## Half Of Tweens Feel They Make Friends Easily

More than half of 7-12-year-olds in the U.S. claim they are “very good at making friends,” according to Ikea. Tweens in Hungary are even more confident with their friend-making skills (75%) while those in Japan are least confident (37%).

More than three in four U.S. parents (77%) encourage their children to have lots of friends, rather than just one best friend. One in three parents (33%) say they always organize play dates in advance and 39% regularly arrange sleepovers so their children can maintain their friendships outside of school.

7-12-YEAR-OLDS WHO CONSIDER THEMSELVES “VERY GOOD AT MAKING FRIENDS,” BY COUNTRY



SOURCE: Ikea

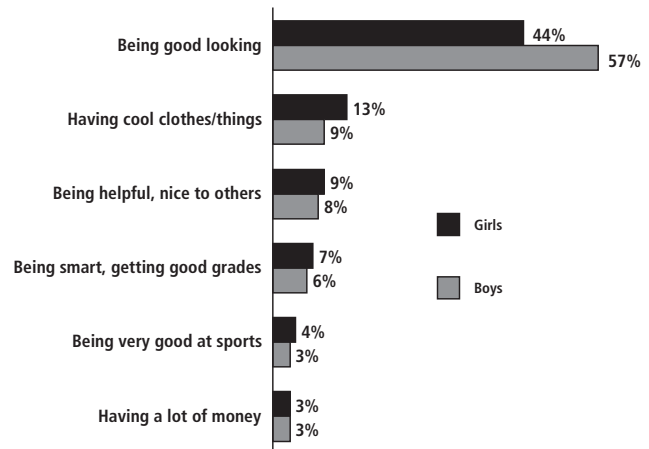
SOURCE: Ikea, Mona Astra Liss, 420 Alan Wood Rd., Conshohocken, PA 19428; 610-834-0180, x5852; mona.lisa@memo.ikea.com; www.playreport.org.

## Good Looks Are Key To Popularity

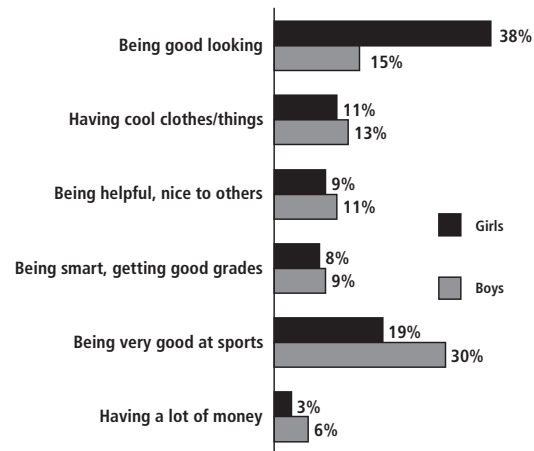
Both boys and girls in grades 3-12 overwhelmingly say looks are essential to a girl’s popularity, according to the Women’s Sports Foundation. Having cool clothes and products also help, but money and athleticism don’t.

Students split on reasons for a boy’s popularity. Girls believe attractiveness is the top factor, but boys place a higher premium on excelling in athletics.

WHAT MAKES A GIRL POPULAR



SOURCE: Women’s Sports Foundation



SOURCE: Women’s Sports Foundation

SOURCE: Women’s Sports Foundation, Aleia Naylor, Senior Marketing, Eisenhower Park, 1899 Hempstead Turnpike, #400, E. Meadow, NY 11554; 516-542-4700; anaylor@womenssportsfoundation.org; www.womenssportsfoundation.org.

## Inside Teen Girls’ Minds

Two in three teen girls (65%) tell their best friend or sister whenever their favorite brand or store has a sale, according to Euro RSCG Worldwide. Nearly six in 10 (57%) tell others when they discover a new brand or trend. They also aren’t shy about voicing displeasure. More than seven in 10 (72%) will tell “lots of people” about a bad experience with a brand, product, or service.

Teen girls tend to vary the ways they share this information with each other. Half pass it along via text message, 28% use the phone, 5% rely on Facebook, and another 5% use IM.

One in two teen girls typically shop at stores near their home, with 47% saying music and atmosphere at a retail store are important factors in their shopping experience.

Retail is preferred over online shopping by three in four girls, though 67% say they don't buy online because they lack a credit card. They spend less when shopping in groups. Teen girls spend 23% more when shopping with best friends or sisters over a group of friends. They spend 43% less when with a boy than with their best friend or sister.

Teen girls tend to look to celebrities rather than peers for advice on style. Four in 10 (42%) say their style is influenced by their favorite movie and TV stars, and 26% are influenced by the popular or "cool" girls at their school.

**SOURCE:** Euro RSCG Worldwide, Marian Salzman, President, 200 Madison Ave., 2nd Fl., New York, NY 10016; 212-367-6811; marian.salzman@eurorscg.com; www.forsistersbysisters.com.

## Millennials Believe Technology Defines Their Generation

Six in 10 Millennials (61%) believe their generation has a unique and distinctive identity, according to the Pew Internet & American Life Project.

One in four (24%) feel their generation is special because of their use of technology, 11% because of music/pop culture, and 7% because they are liberal and tolerant. As a com-

### WHAT MAKES THEIR RESPECTIVE GENERATION DISTINCT AND UNIQUE, 2010

MILLENNIAL	
Technology .....	24%
Pop culture .....	11%
Liberal/tolerant .....	7%
Smarter .....	6%
Clothes .....	5%
GEN X	
Technology .....	12%
Work ethic .....	11%
Traditional .....	7%
Smarter .....	6%
Respectful .....	5%
BOOMER	
Work ethic .....	17%
Respectful .....	14%
Values/morals .....	8%
"Baby Boomers" .....	6%
Smarter .....	5%
SILENT	
WWII .....	14%
Smarter .....	13%
Honest .....	12%
Work ethic .....	10%
Values/morals .....	10%

**SOURCE:** Pew Internet & American Life Project

parison, Boomer's feel their generation is unique due to their work ethic and the Silent Generation attributes their distinctive identities to WWII and the Depression.

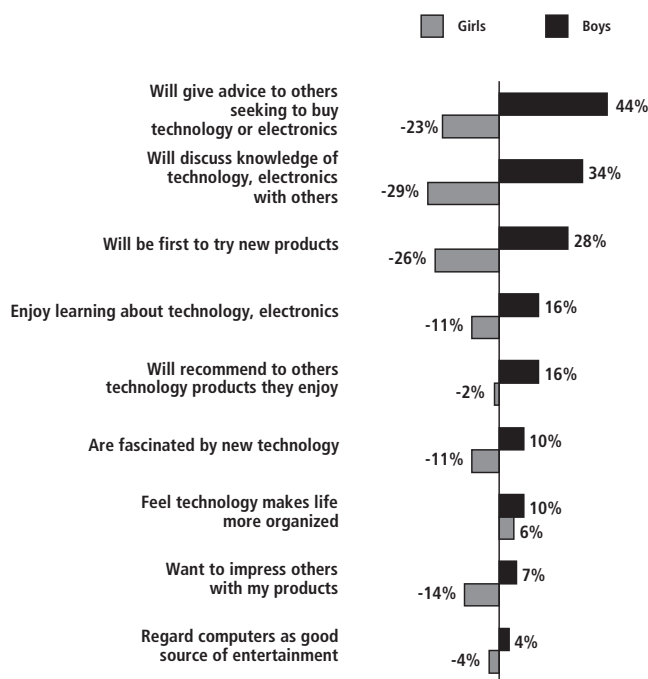
**SOURCE:** Pew Internet & American Life Project, John Horrigan, Associate Director Research, 1615 L St. NW, #700, Washington, DC 20036; 212-419-4500; jhorrigan@pewinternet.org; www.pewinternet.org.

## New Technology Fascinates Teen Boys, But Teen Girls Have Other Priorities

Teen boys age 15-19 are 10% more likely than teens aged 13-19 to agree they are "fascinated by new technology," whereas teen girls age 15-19 are 11% less likely to agree with that statement, according to MediaMark Research & Intelligence.

Teen boys, in general, are more eager to be viewed as influential and to test out new technology and electronic products. Conversely, teen girls are less apt to adopt new technologies or discuss their knowledge with others. Both genders, however, agree that technology makes their lives more organized.

TECHNOLOGY ATTITUDES, TEENS, BY GENDER



**SOURCE:** MediaMark Research & Intelligence

**SOURCE:** "2009 TeenMark Study," MediaMark Research & Intelligence, Anne Marie Kelly, SVP Marketing & Strategic Planning, 75 9th Ave., 5th Fl., New York, NY 10011; 212-884-9204; annemarie.kelly@mediamark.com; www.mediemark.com.

## Do Your Eyes Deceive You? Teens Say Their Social Network Behavior Is, Um, Cool

More than eight in 10 teens (83%) believe they do not behave unethically when it comes to using social net-

working sites, according to a Junior Achievement/Deloitte Teen Ethics Survey. However, 16% admit to posting content that may embarrass others, spreading rumors, or pretending to be someone else on these sites. More than half (54%) later regretted these types of behaviors. Also:

- ▶ 82% feel prepared to make ethical decisions at work.
- ▶ 40% do not consider the potential reactions of college admission officers when posting content online; 38% don't consider the reactions of present or future employers; and 30% don't consider their parents' reactions.
- ▶ Nearly six in 10 teens (58%) would consider their ability to access social networks at work when considering a job offer from a potential employer.
- ▶ 88% use social networks every day, with 70% using for more than one hour.

**SOURCE:** Junior Achievement, Stephanie Bell, Director Marketing & Media Relations, 1 Education Way, Colorado Springs, CO 80906; 719-540-6171; sbell@ja.org; www.ja.org.

## Kids Want Parents To Act Their Age

Children say they are more annoyed when their parents don't act their age than when their parents nag them, according to Nick News. Kids also dislike when their parents tell them to act their age or treat them as little kids.

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### IT'S SO ANNOYING TO CHILDREN WHEN PARENTS....

1. Don't act their age
2. Say, "Act your age!"
3. Nag
4. Treat child as a little kid
5. Tell old and corny jokes to child's friends
6. Say, "When you're older, you'll understand"
7. Say, "When I was your age"
8. Say, "Because I said so, that's why"
9. Obsess over things that don't matter
10. Say, "Go ask mom" or "Go ask dad"

**SOURCE:** Nick News

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**SOURCE:** Nickelodeon, Maria Poulos, 1515 Broadway, New York, NY 10036; 212-846-6283; maria.poulos@mtvstaff.com; www.nick.com.

## Majority Of Teens Own Game Consoles

Eight in 10 teens aged 12-17 (80%) own a video game console, such as Nintendo Wii or Sony PlayStation, compared to 37% of those over age 18, according to the Pew Internet & American Life Project. Boys are more likely than girls to own one (89% vs. 70%). Furthermore, one in four teens (24%) uses the device to go online.

Teens are twice as likely as adults to own a portable gaming device (51% vs. 18%). Among teens with a portable gaming device, 19% use it to access the Internet.

### OWNERSHIP OF VIDEOGAME CONSOLES AND PORTABLE GAMING DEVICES, BY AGE

	Console
12-13	81%
14-17	79%
18+	37%
	Portable
12-13	66%
14-17	44%
18+	18%

SOURCE: Pew Research & American Life Project

SOURCE: Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; www.pewinternet.org.

## Key Motivators In Purchasing Videogame Consoles

Blu-ray capabilities (65%) and affordability (63%) are the top purchase motivators to get videogamers to purchase a new gaming console system.

The survey specifically questioned the purchase intent of the PS3 to gauge whether the exclusivity of the *God of War III* videogame is a key selling point. Notably, only 12% cite a specific game title as the motivator in buying a console system.

### TOP MOTIVATORS IN PURCHASING A NEW VIDEOGAME CONSOLE

Seek Blu-ray capabilities	65%
Price reduction meets budget	63%
Library of available games	62%
Upgrade from PS2	62%
Friends own PS3; want to connect, play games with them	56%
Online capabilities	50%
Multimedia capabilities	49%
Ability to play multiplayer games on the PlayStation Network	42%
Attractive price bundle of HDTV/PS3	36%
A specific game title	12%

SOURCE: Nielsen

SOURCE: Nielsen Games, Michael Flamberg, Account Executive, 6255 Sunset Blvd., Los Angeles, CA 90028; 323-817-1597; michael.flamberg@nielsen.com; www.nielsenmedia.com.

## Gamer Parents Are Doing Their Research Before Buying For Kids

Seven in 10 parents (70%) pay attention to a videogame's ERSB rating when purchasing the game for their children, according to the Harrison Group and Activision Publishing. Two in three (62%) research the games their children want, typically online, before purchasing.

Three in four parents (76%) say videogames are a part of their family's life, and 63% of parents consider themselves gamers. Among these parent gamers, 52% of their videogame playing time is spent with their children.

SOURCES: "Ratings Are Not A Game," Activision Publishing, Dave Anderson, Senior Director Business Development, 3100 Ocean Park Blvd., Santa Monica, CA 90405; 310-255-2000; danderson@activision.com; www.activision.com.

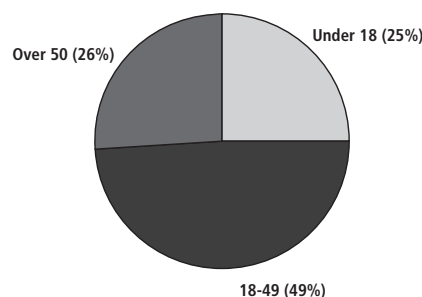
Harrison Group, Jim Taylor, Vice Chairman, One Exchange Pl. 21 W. Main St. 5 Fl., Waterbury, CT 06702; 203-573-0400; info@harrisingroupinc.com; www.harrisingroupinc.com.

## Parents Abridge Gamer Kids' Playtime

Parents are slightly more likely to place time limits on their children's videogame playing (79%) than on their Internet usage (72%), TV viewing (71%), or movie viewing (63%), according to the Entertainment Software Association.

Nearly all parents say they are present when games are purchased or rented for their child (92%) and that they monitor the games the kids play (94%). Two in three believe videogames are a positive part of their child's life.

### AGE BREAKDOWN OF VIDEOGAME PLAYERS



SOURCE: Entertainment Software Association

SOURCE: "Essential Facts About the Videogame Industry 2009," Entertainment Software Association, Dan Hewitt, 575 E. 7th St. NW, #300, Washington, DC 20004; 202-233-2400; dhewitt@theesa.com; www.theesa.com.

## Youth Videogame Usage Peaks At Ages 9-11

At 12.4 million, tweens aged 9-11 represent the largest segment of gamers among 2-17-year-olds, according to NPD Group. They play an average 10.6 hours per week, until they reach age 15, when hours spent gaming start to decrease. Those aged 2-5 comprise the smallest segment at 9.7 million.

Tweens aged 9-14 play games on an average of three systems or devices, more than the average 2.5 systems or

devices for all 2-17-year-olds. Gaming on non-traditional devices, such as cell phones, increases in popularity as they age and peaks at ages 15-17.

Overall, 55.7 million 2-17-year-olds — 82% — consider themselves gamers. Half (51%) play games online (51%), with most consisting of males aged 9-14.

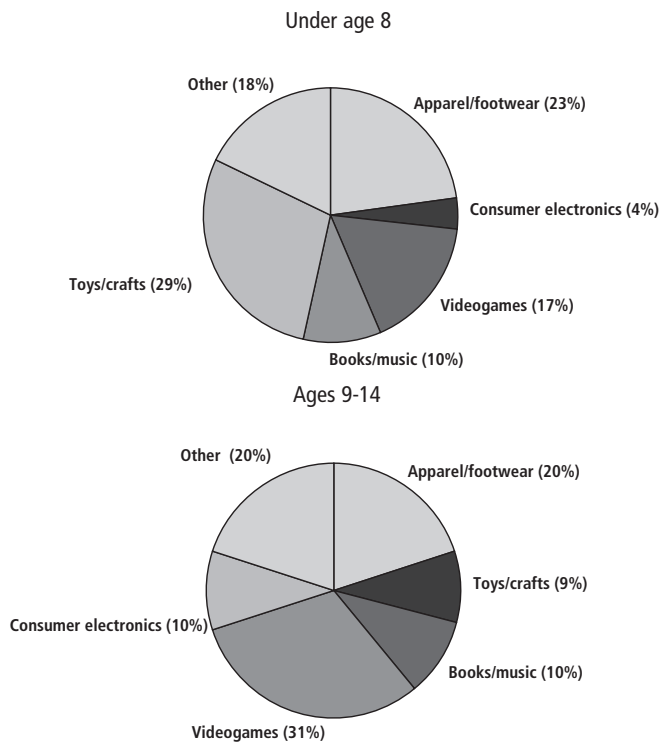
**SOURCE:** NPD Group, Anita Frazier, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita\_frazier@npd.com; www.npd.com.

## At Age Nine, Kids' Videogame Spending Soars, But Toy Purchases Plummet

The amount children spend on videogames jumps significantly between ages eight and nine, according to the NPD Group. Some 17% of overall spending by those under age eight is earmarked for videogames, compared to 31% among those aged 9-14.

Likewise, the amount spent on toys and crafts drops dramatically from 29% to 9%.

KIDS' BUDGETS, BY AGE



**SOURCE:** NPD Group

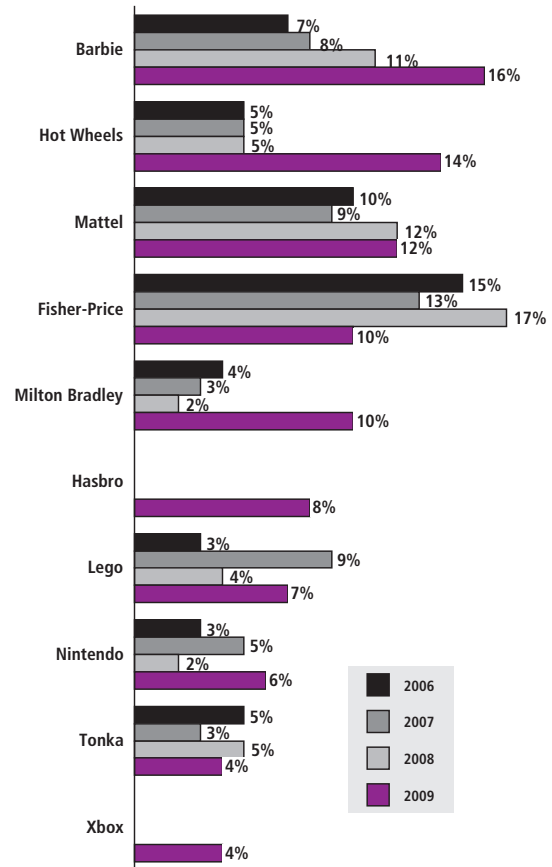
**SOURCE:** NPD Group, Anita Frazier, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita\_frazier@npd.com; www.npd.com.

## Shoppers Expect Retailers To Stock Barbie

Barbie is the top toy brand consumers expect to find when shopping in mass market stores, according to *Retailing Today*. The report monitors shoppers' unaided expectations when it comes to brand names they look for at mass market retailers.

One in six shoppers (16%) expect mass retailers to sell Barbie and 14% expect stores to carry Hot Wheels. Hasbro made its debut on the list this year, while Leap Frog, Little Tikes, and Sony PlayStation dropped off.

SHOPPER EXPECTATION OF TOY BRANDS THEY'LL FIND AT MASS MERCHANTS, 2006-2009



**SOURCE:** *Retailing Today*

**SOURCE:** "Retailing Today 2009 Top Brands Survey," *Retailing Today*, Leo J. Shapiro, George Rosenbaum, President, 153 W. Ohio St., #300, Chicago, IL 60610; 312-321-8111; www.ljs.com.

## Teen Gamers Flock To Driving, Puzzle Genres

Nearly all teens play videogames (97%), with racing and puzzle-type games as their preferred formats, according to the Pew Internet & American Life Project. Nine in 10 parents (90%) say they "always" or "sometimes" know what games

their children play. Three in four (73%) check game ratings and one in three (31%) actually play the game — either to monitor or for enjoyment — with their children. Parents of boys are more likely than parents of girls to play violent games and to monitor their child's game playing.

A majority of parents (62%) believe videogames do not effect their children, though 13% believe games have a negative influence.

#### MOST POPULAR VIDEOGAME GENRES AMONG TEENS

Racing (NASCAR, Mario Kart) .....	74%
Puzzle (Tetris, Solitaire) .....	72%
Sports (Madden, Tony Hawk) .....	68%
Action (Grand Theft Auto, Devil May Cry) .....	67%
Adventure (Legend of Zelda, Tomb Raider) .....	66%
Rhythm (Guitar Hero, Dance Dance Revolution) .....	61%
Strategy (StarCraft, Civilization IV) .....	59%
Simulation (The Sims, Rollercoaster Tycoon) .....	49%
Fighting (Tekken, Super Smash Bros.) .....	49%
First-Person Shooter (Halo, Counter-Strike) .....	47%
Role-playing (Final Fantasy, Blue Dragon) .....	36%
Survival Horror (Resident Evil, Silent Hill) .....	32%
MMOGs (World of Warcraft) .....	21%
Virtual Worlds (Second Life, Habbo Hotel) .....	10%

NOTE: Among teens who play videogames

SOURCE: Pew Internet & American Life Project

SOURCE: Pew Internet & American Life Project, Amanda Lenhart, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; [www.pewinternet.org](http://www.pewinternet.org)

## factoids

- ▶ Nine in 10 teens (90%) believe they will one day have their **perfect job**, with the vast majority saying that getting good grades (93%) and believing in themselves (93%) is what it takes to land their dream job. (*Junior Achievement*; phone: 719-540-6171)
- ▶ Six in 10 18-29 year olds (60%) are worried about being able to **pay their bills** and meet financial obligations, and 45% say their personal financial situation is bad. (*Harvard Institute of Politics*; phone: 617-496-4009)
- ▶ Teenage girls (60%) typically wait for an item to go on sale before buying, and 77% are more likely to buy a **sale item** than a full-priced item. (*Euro RSCG North America*; phone: 212-367-6811)
- ▶ Boys aged 12-17 are more likely than girls the same age to be motivated to **succeed in work** when given a high salary (74% vs. 67%) or promotions and raises (56% vs. 38%). (*Junior Achievement*; phone: 719-540-6171)
- ▶ Some 22% of teenagers do not have a **budget** for their spending money; of those, 32% believe that budgeting is something only adults need worry about, and it does not matter how their money is spent. (*Junior Achievement*; phone: 719-540-6171)
- ▶ More than two thirds of men aged 18-21 (69%) say it takes a while for their minds to **feel awake** in the morning, including 57% who say it takes several hours for them to feel they are functioning at full capacity. (*Unilever*; phone: 312-661-2326)
- ▶ Although 40% of children claim to know how to **swim well**, only 18% have taken a swimming lesson from a certified instructor. (*USA Swimming*; phone: 719-216-4212)
- ▶ A quarter of children (25%) attend **summer learning programs**, including 35% of Black children, 29% of Hispanic children, and 27% of children from low-income families. (*Afterschool Alliance*; phone: 202-371-1999)
- ▶ Nearly half of college students (47%) plan to **send out resumes** electronically when they begin looking for a job, compared to 27% who will send them out both electronically and on paper, and 17% who will send them on paper. (*Domtar*; phone: 514-848-5938)
- ▶ A majority of **babysitters** (54%) engage in an outdoor activity — such as going to a park or riding bikes — with the children in their charge, 30% work on arts and crafts, and 13% take the kids to a play group or on a field trip. (*Sittercity.com*; phone: 312-436-0952)
- ▶ More than four in 10 parents (41%) believe they influence their children's **clothing and product preferences**, acknowledging that these decisions are also influenced by friends (37%) and advertising (23%). (*Burst Media*; phone: 781-852-5291)
- ▶ Nearly a third of **children aged 8-18** (31%) want to get more involved in musical activities as the result of music related TV shows such as Glee or Camp Rock 2; 16% would like to learn an instrument, 14% want to try out for a school play, and 12% would like to take singing lessons. (*National Association of Music Merchants*; phone: 760-438-8007, x102)
- ▶ Teens most commonly name Steve Jobs (23%) as the **entrepreneur** they most admire, followed by J.K. Rowling (17%), Oprah (14%), and Jay-Z (13%). (*Junior Achievement*; phone: 719-540-6171)
- ▶ Just over half of children in grades one through 12 (51%) are **happy with the way they look**, a number that decreases with age: 30% of those in grades five through eight and 18% of those in grades nine through 12 are happy with the way they look. (*C&R Research*; phone: 312-828-9200)
- ▶ Whereas 82% of parents of 5-17 year olds who keep **guns** in their homes have discussed gun safety with their children, only 48% of parents who do not keep guns have done so. (*University of Michigan Health System*; phone: 734-764-2220)



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