RESEARCH ALERT YEARBOOK 2012 EDITION

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RA RESEARCH ALERT

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introduction

The consumer trends revealed in the *Research Alert Yearbook* overlap the specific chapter breakdowns and operate on many levels.

For example, while there's a chapter titled Emerging Majorities and Cultural Values, you'll also find data about Hispanic, Black, and Asian American consumer behavior and attitudes in subsections of the chapters on Finance, Mobile Devices, and Shopping and Spending.

Similarly, there is a wealth of detail on shopping and spending throughout the book relative to everything from consumer electronics, to media use, to groceries, to family.

The Index is a wonderful way to pull together data from across chapters through the widest angle lens. The same is true for the search function in a PDF. You'll draw your own conclusions based on the statistics and insight most relevant to your query.

Among the overarching themes illuminated in the *2012 Yearbook* are:

- how diversity (which means different things in different contexts to different people) is a norm that governs many aspects of life, taste, culture, and media use;
- new attitudes toward work and thrift in a troubled economy;
- the new multi-media, multi-platform universe;
- and how social media has become a universal tool for personal and brand communication.

Diversity As The Norm

The American population has always been one in flux; it's perhaps our defining characteristic, and arguably our strongest. American households and families are becoming ever-more diverse in a variety of ways — race/ethnicity, family structure, sexual orientation of partners and parents, multiple generations living together, adults living with roommates.

In less than 10 years, non-Hispanic Whites will be the minority among family households. Already, four in 10 U.S. families are Black, Hispanic, and/or Asian. Nearly a quarter of U.S. children are Hispanic.

The majority of Black and Hispanic fathers have at least one child outside of marriage, and almost half of fathers overall do. Among households headed by unmarried partners, almost four in 10 include the biological children of at least one partner. Some 45% of all U.S. households are headed by unmarried adults.

Meanwhile, laws supporting marriage rights for gays and lesbians enjoy broad-based support. This diverse America is not the melting pot of the early 20th Century, however. Part of our increasing acceptance of diverse cultural backgrounds is a tendency to embrace the new-to-us foods, music, art, and traditions of our neighbors. Seven in 10 Americans say they could be attracted to someone of a different racial/ethnic background than their own.

Hispanics, Asians, and African Americans are proud of their cultural heritages, and they're much more likely to live a rich, bicultural existence than to melt into the larger whole. They're changing America as much as it's changing them.

Understanding the Struggle

The long recession has affected Americans at all income levels — and shown us not just how to make do with less, but also how to focus on what we care about most. Despite being least financially secure, Black and Hispanic Americans are the most at ease among all racial/ethnic groups about their current finances — and most optimistic about their futures. It may simply be that because their incomes have been lower for a long time, they're better accustomed to managing their immediate needs and focusing on spending time with family and friends. If this is true, it may be that the lingering recession will impart greater resilience to people who had not before experienced much financial hardship.

It's already apparent that there is a certain fellowship in weathering tough times; anyone who's chatted with a fellow customer waiting in line at a grocery store has probably experienced this. We all talk about prices, and finding or keeping work, and there is a level of immediate camaraderie. It doesn't solve the problem, but it is a warmer, more human experience than waiting in line during boom times.

Work Is About More Than Work

Job satisfaction is a major factor in people's contentment with where they live. It's no secret that Baby Boomers are delaying retirement — more than eight in 10 plan to continue working after they're eligible to retire. It's not (only) that they feel they need the money; they're also worried about "settling down."

Many Boomers have come to view this part of their lives as an opportunity to try something they've always wanted to do, even if that means beginning all over again. If they succeed in their reimagined retirement goals — of staying engaged with life, of having some fun, of doing something true to themselves — it may change how their successors think about retirement, too.

Multiple Media, Multiple Retail Channels

Our changing population is working, playing, and shopping in a rapidly changing society; there are parallel shifts happening in media and at retail. They're both due to the growing adoption of mobile devices, and with them, Internet access on the go. Marketers can no longer think in terms of online shoppers vs. offline shoppers, nor of mobile shoppers vs. other shoppers. More than eight in 10 adults have cell phones, four in 10 mobile phone owners have smartphones, and smartphones make up more than half of new phone purchases. As use of cell phones and home Internet access become increasingly universal, all shopping is becoming cross-channel shopping.

The in-store shopper has researched her purchase ahead of time online, perhaps by reading reviews from other consumers who have bought the item, perhaps by checking with her friends on Facebook, perhaps by visiting the manufacturer's site. That doesn't mean she won't also pull out her phone to take photos of something that catches her eye in the store, and send them to her friends for an "Is this better?" opinion.

She might have brought a printed online coupon with her, or she might check around on the Internet from her smartphone while she's waiting in line at the register. She might (sorry to say), discover that the same item is offered for a significantly lower price at another retailer and go home to buy it online. Or do so right then and there.

Although consumers are increasingly pleased with their online shopping experiences, there's also a renewed appreciation for the three-dimensional experience of shopping in stores. For the most part, mobile is acting as a partner to in-store shopping, not a competitor. Consumers may be newly empowered with price comparison tools in the palms of their hands, but many of the most popular shopping features mobile offers are those that enhance the in-store experience: checking store locations and hours, checking stock on particular items, getting directions, snapping photos and connecting with friends, reading reviews, and so on.

Similarly, as consumers' media and entertainment options have multiplied, so has their desire to be connected "wherever/whenever" with their favorite shows, movies, music, games, etc. More than half of Internet users watch online video each week, and two thirds have paid for online content, but it doesn't seem to be leading to "cord cutting" of their television subscription services. That's not to say that they're always paying close attention, however. Multitasking with media is rampant, and viewers are just as likely to be checking Facebook during programs as during commercials.

Social Media

Social media have moved solidly into the mainstream — 65% of online adults use them — and women are the heaviest users (69%). Facebook is by far the most widely used, while Twitter is the most likely to be accessed via mobile. Social networkers use the sites primarily to keep in touch with existing friends (and family), rather than to reach out to new people who share their interests. While there are still significant trust issues around e-commerce via social networks, that area is expected to develop in the next few years.

Social media users are relatively open to interacting with brands on the networks (especially Facebook), but they expect to receive tangible rewards for doing so — such as access to exclusive promotions, deals, and special events. They also want companies to respect their virtual space, to fit into what is primarily a fun-oriented space in an unobtrusive way, without invading their sense of privacy.

Conclusion

Whether you read through cover-to-cover (hard to imagine!), or hunt for a fact to fill in a blank, or browse for background, context, or trends, the *2012 Research Alert Yearbook* will offer new insights, and more data every time you return to it. We hope you'll do so often!

affluent consumers

Affluent Americans are disproportionately White, and almost twice as likely as members of the overall U.S. population to be Baby Boomers. The wealthiest 10% of Americans account for 46% of affluents' total net worth.

More than three quarters of affluent Americans acquired their wealth through income from their own work; about a quarter inherited at least some of it. While nearly all say they're more well-off than their parents were, fewer than half expect their offspring or other heirs to have as much wealth as they do now.

The majority of affluent parents haven't fully disclosed to their kids how much money they have. Younger affluents and those in the top tier of net worth are most likely to buy luxury goods; Boomers have largely shifted their focus to spending on experiences rather than items. Affluents age 65 and older are less likely than younger affluents to have lost confidence in financial institutions or to have changed their spending habits due to the recession.

Although three quarters of affluent Americans are optimistic about their prospects for the coming year, affluent women feel less secure about their personal finances than their male counterparts do. There is concern among all affluent income groups about the decline in real estate values.

Four In 10 Affluents Are Boomers

Affluent Americans (defined as those with household incomes of $100,000 or more) have a median household income of $141,000 per year, and a median net worth of $544,000, according to Ipsos Mendelsohn. Together, they account for $1.4 trillion in annual spending.

Although only about one in 10 (11%) have household incomes of $250,000 or more, this segment represents a third of total income among affluents. Similarly, the 10% who have a household net worth of $2 million or more account for nearly half (46%) of total net worth among the affluent population.

More than eight in 10 affluent Americans are White (85%), compared to 72% of Americans overall (according to the latest data from Census 2010). Affluents are more likely than members of the general population to be Asian but less likely to be Black or Hispanic. More than one in 10 affluent Americans (15%) speak a language other than English at home. Two percent of affluent Americans are lesbian/gay/bisexual/transgender.

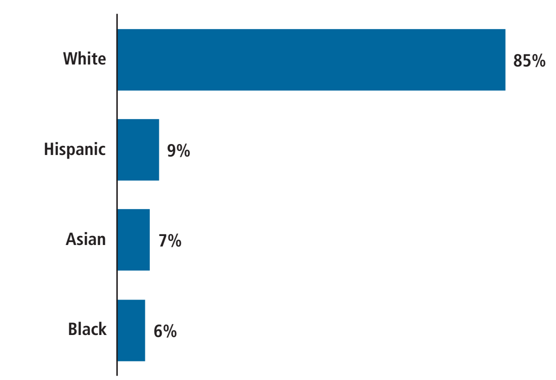
The 25.2 million affluent Baby Boomers make up 43% of affluent adults in the U.S. Gen Xers are the next biggest segment, at 16.9 million.

In some ways, affluent Gen Xers and Millennials are similar — they are equally comfortable with technology and spend similar amounts of time online — while in other ways their attitudes and habits differ, partly because they're at different stages in their lives.

Eight in 10 affluent Millennials are unmarried, compared to only 15% of Xers who are unmarried. Two in 10 Millennials have children under 18 at home, compared to 69% of Xers who have kids at home.

It's not surprising, then, that Xers are more likely than Millennials to watch movies or TV with their families several times a week (70% vs. 50%), or that Xers are more likely to say they almost always choose brands based on what their

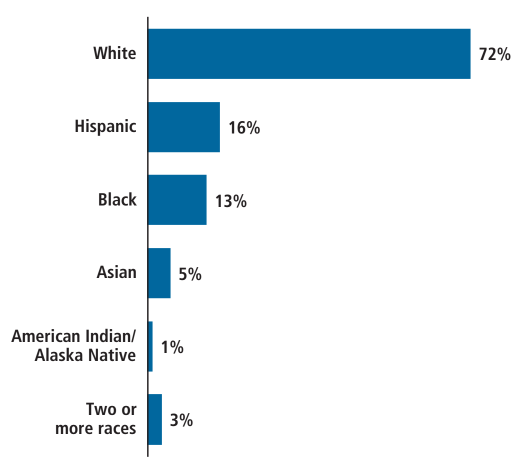
AFFLUENT AMERICANS, BY RACE/ETHNICITY



NOTE: Hispanics may be of any race.

SOURCE: Ipsos Mendelsohn

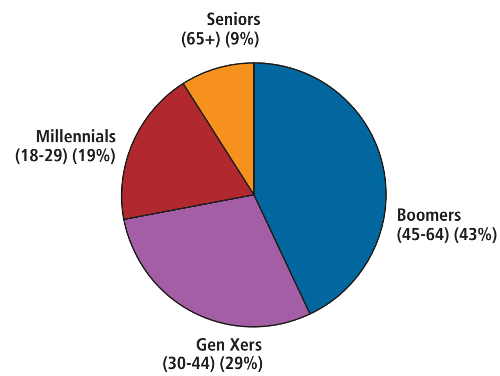
U.S. POPULATION, BY RACE/ETHNICITY



NOTE: Hispanics may be of any race.

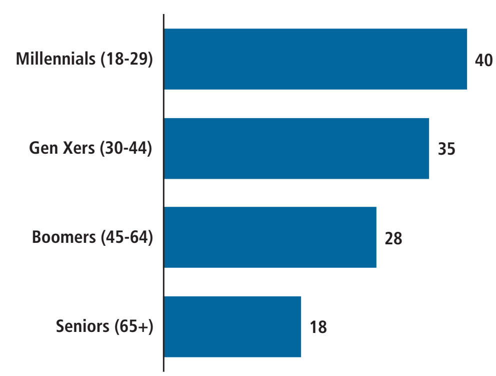
SOURCE: U.S. Census Bureau, 2010

AFFLUENT AMERICANS, BY GENERATION



SOURCE: Ipsos Mendelsohn

HOURS AFFLUENT AMERICANS SPEND ON THE INTERNET EACH WEEK, BY GENERATION



SOURCE: Ipsos Mendelsohn

children prefer (25% vs. 8%). Xers are also the most likely among affluent adults to consider their jobs careers rather than “just a job.”

Millennials are most likely among affluent adults to say that music is an important part of their lives, to want to stand out from the crowd, and to proffer advice.

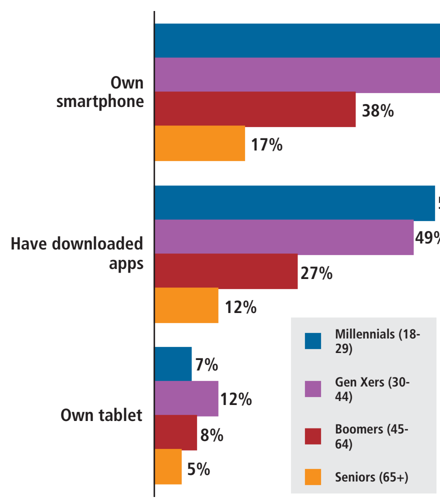
Boomers are most likely to say they’re still spending more cautiously than they used to. They’re also more likely than affluents overall to be focused on home renovations or decorating projects: More than half (56%) say they regularly take on do-it-yourself projects at home.

Seniors have the highest average net worth of any generation ($1,686,000), and are more likely than younger affluents to vote, hold current passports, and buy luxury cars. More than seven in 10 affluents age 65 or older (72%) say they prefer to buy American-made products.

Affluent adults who have children under 18 at home (38% of all affluent households) are more likely than those without kids at home to own multiple mobile devices and to be active on social networks. More than eight in 10 affluents with kids at home (83%) have four or more mobile devices in the household, compared to 73% of affluents without kids at home.

More than half of those with kids at home (52%) have updated a profile on a social networking site in the past 30 days, compared to 45% of those without kids. Affluent social networkers with children have an average of 161 social network contacts; those without children have an average of 137. [The Ipsos Mendelsohn study also includes psychographic profiles, information on media preferences and habits, and data on leisure and travel.]

AFFLUENT AMERICANS’ USE OF MOBILE DEVICES, BY GENERATION



SOURCE: Ipsos Mendelsohn

SOURCES: “Affluent Generations: From Affluent Millennials to Affluent Seniors, The Ipsos Mendelsohn Affluent Survey,” Mark Kostelec, SVP, 1271 Ave. of the Americas, 15th Fl., New York, NY 10020; 212-265-3200; mark.kostelec@ipsos.com; www.ipsos-na.com. Price: Contact for information.

“Overview of Race and Hispanic Origin: 2010,” March 2011, U.S. Census Bureau, 4600 Silver Hill Rd., Washington, DC 20233; 301-763-4636; pio@census.gov; www.census.gov. Price: Available online at no charge.

Luxury Spending Is Rebounding Slowly

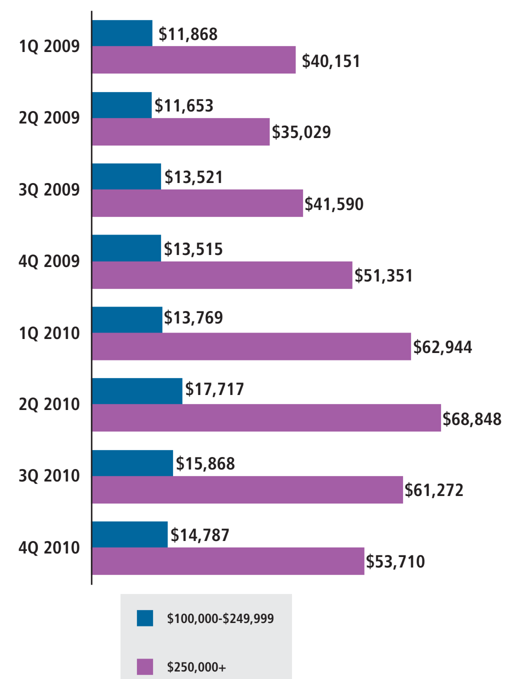
Consumer spending on luxury goods rose steadily from 2nd quarter 2009 through 2nd quarter 2010, then tapered off and declined slightly through the end of 2010, according to Unity Marketing. Ultra-affluent consumers — those with household incomes of $250,000 or higher — increased their spending on luxury goods and services by 34% between early 2009 and the end of 2010, while consumers with incomes of $100,000-$249,999 increased their spending on luxury items by 25% during that time.

Luxury purchases still haven’t rebounded fully from the recession, however; only about four in 10 affluent consumers bought luxury home goods, personal items, or experiential services in 2010, compared to more than half in 2006.

The study identifies ultra-affluents and younger affluents (age 44 and younger) as the key growth markets for luxury purchases. Although ultra-affluent households make up only 2% of U.S. households, they spend three or four times as much as affluent households with incomes of less than $250,000.

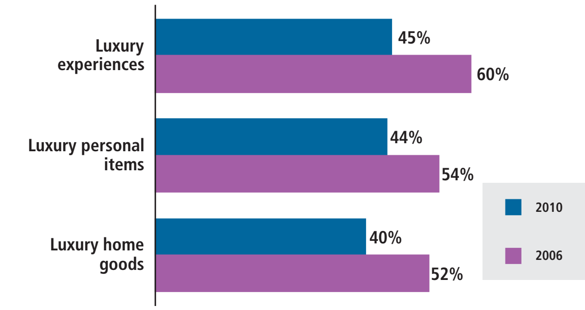
Younger affluents are of interest to luxury marketers because they’re more likely to be focused on acquiring goods than affluent Boomers, who have shifted away from buying objects to seeking new experiences.

AFFLUENT CONSUMERS’ QUARTERLY SPENDING ON LUXURY PURCHASES, 2009-2010, BY ANNUAL HOUSEHOLD INCOME



SOURCE: Unity Marketing

LUXURY PURCHASES BY TYPE, 2010 VS. 2006
(% of affluent consumers who made these purchases)



SOURCE: Unity Marketing

SOURCE: "The Luxury Report 2011: Ultimate Guide to the Luxury Consumer Market," Unity Marketing, Pam Danziger, President, 206 E. Church St., Stevens, PA 17578; 717-336-1600; pam@unitymarketingonline.com; www.unitymarketingonline.com. Price: $3,5000.

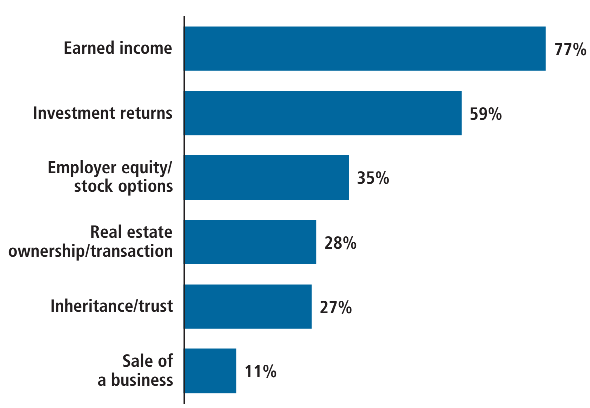
Affluents Hesitate To Discuss Wealth With Kids

More than three quarters of high net worth Americans (with investable assets of $3 million or more) accumulated their wealth through income from their work, while just over a quarter inherited at least some of it, according to U.S. Trust (multiple responses were allowed).

More than four in 10 plan to continue working after "retirement," including 16% who plan to embark on new careers, 7% who want to start new businesses, and 21% who say they will simply never retire from their current work. Just under half (47%) feel there have been personal costs to creating their wealth.

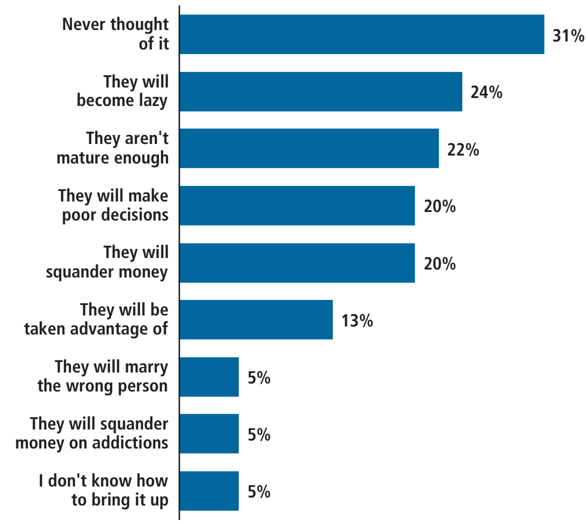
While more than nine in 10 (96%) say they're wealthier than their parents, just under half (49%) expect their heirs to be equally or more well-off. Nine in 10 (91%) have made wills, and 88% have estate plans, but 39% of those with estate plans acknowledge that they're not comprehensive.

HOW AFFLUENT AMERICANS ACQUIRED THEIR WEALTH



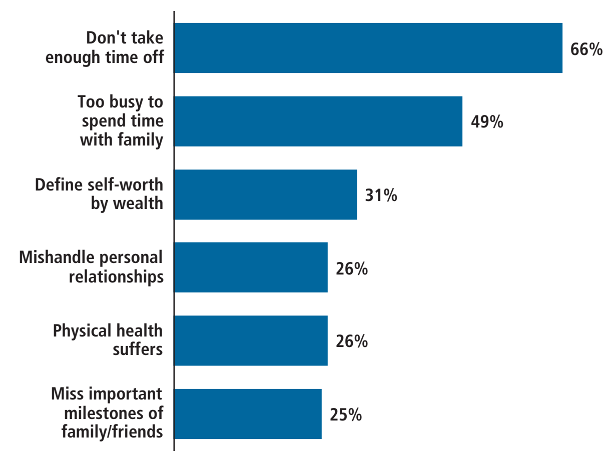
SOURCE: U.S. Trust

WHY AFFLUENT PARENTS DON'T DISCUSS THEIR WEALTH WITH THEIR CHILDREN



SOURCE: U.S. Trust

PERSONAL "COSTS" OF ACQUIRING WEALTH
(Among high net worth individuals who say there's been a personal cost)



SOURCE: U.S. Trust

NUMBER OF HIGH NET WORTH HOUSEHOLDS IN THE U.S., 2011
(By investable assets, not including primary residence)

$1 million or more	5.6 million
$1 million to $4.9 million	4.8 million
$5 million or more	782,000
$10 million or more	182,000

SOURCE: U.S. Trust

Only a third of high net worth parents (33%) have disclosed full details of their wealth to their children. Just over half (52%) have disclosed some details, while 15% haven't told their children anything about the family finances.

For the most part, parents' reluctance to tell their children about the family wealth stems from fears that they won't handle the information responsibly.

SOURCE: "U.S. Trust Insights on Wealth and Worth: Survey of High Net Worth and Ultra High Net Worth Americans, 2011," U.S. Trust, Bank of America Private Wealth Management, Keith Banks, President, One Bryant Park, New York, NY 10036; 212-852-1000; also, Lauren Sambrotto; 646-743-0812; l.sambrotto@bankofamerica.com; www.ustrust.com/survey. Price: Available online at no charge.

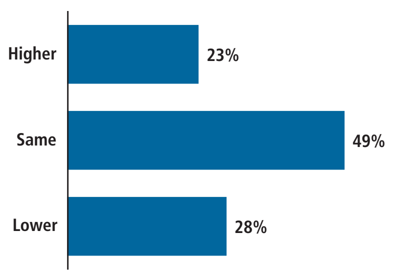
Affluents Optimistic About Business

Affluent consumers are more optimistic about the country's overall economic and business conditions than about their immediate financial prospects, but fewer than a third expect their incomes to decrease in the coming year, according to a survey of U.S. adults with a minimum net worth of $800,000 by the American Affluence Research Center.

Nearly two thirds of affluent adults (65%) own or have access to smartphones and/or tablets. Ownership varies with age, income, and net worth. Those under age 50 are more than twice as likely as those age 60 and older to own smartphones (84% vs. 38%). People with annual incomes of $200,000 or more are more likely than those with incomes below $200,000 to own them (73% vs. 40%).

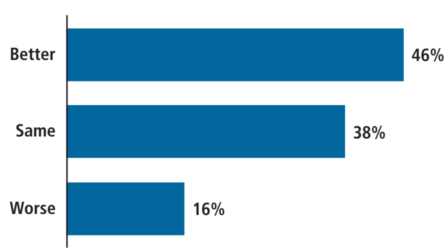
Half (50%) of affluent consumers who own mobile devices and/or computers use social media such as Facebook, LinkedIn, and Twitter. Of these, Facebook is the most popular (80% of social media users participate), followed by LinkedIn (60%). Women are more likely than men to be Facebook users.

HOW AFFLUENT AMERICANS EXPECT THEIR HOUSEHOLD INCOMES TO CHANGE IN THE NEXT YEAR



SOURCE: American Affluence Research Center

HOW AFFLUENT AMERICANS EXPECT OVERALL BUSINESS CONDITIONS TO CHANGE IN THE NEXT YEAR



SOURCE: American Affluence Research Center

Use of social media decreases with age; 64% of affluents under age 50 use them, compared with 33% of those age 60 and older. Among affluent social media users, 18% have signed up to receive product information or updates from a company on Facebook.

Although four in 10 affluent consumers plan to try and reduce or defer their spending during the next year, vacation travel is a bright spot — 26% expect to spend more on domestic and 20% on international travel.

Affluent men are more likely than affluent women to be planning to buy or lease new cars in the coming year (24% vs. 19%). Affluent consumers under age 50 are more likely than those age 50 and older to be planning to buy vacation homes this year.

SOURCE: "The Affluent Market Tracking Study #19, April 15 2011," American Affluence Research Center, Ron Kurtz, President, PO Box 382, Alpharetta, GA 30009; 770-740-2200; info@affluenceresearch.org; www.affluenceresearch.org. Price: $395; $595 with cross-tabulations.

Most Millionaires Are Self-Made, Over Age 60 — And Their Numbers Are Rising

Millionaire households are on the rise, according to Spectrem Group. The number of U.S. households with net worth — not including primary residence — of $1 million or more grew 8% to 8.4 million from 2009 to 2010, and 16% from 2008 to 2009.

The number of ultra-high net worth households (net worth of $5 million or more) grew 8% to 1.06 million in 2010. Households with net worth of $500,000 or more grew 6% to 13.5 million, and those worth $100,000 or more grew 5% to 36.2 million during this time.

The number of millionaires remains below its 2007 peak of 9.2 million, but the number of households worth $100,000 or more is at an all-time high.

When asked how they obtained their wealth, the vast majority of affluent adults cite hard work as the most important factor, and a large proportion also stress the importance of education. Fewer than a third of any affluent segment say they inherited their wealth.

Millionaires are more likely than those with net worth of $100,000 to $1 million to hold advanced degrees. Ultra-high net worth Americans are more likely than affluents with lower net worth to work more than 60 hours per week.

The ultra-affluent are also most likely to work as senior corporate executives, physicians or dentists, or business owners.

Among affluents, those in the $100,000 to $1 million group have been most strongly affected by the recession and are most concerned about having enough to live on in retirement, and maintaining their standard of living.

Two thirds of the $100,000 to $1 million group (67%) are worried about having enough money set aside for retirement, and 31% have had to delay their retirement. Nearly half (46%) have vowed to not take on as much debt in the future, more than twice the number in either of the $1 million-plus groups.

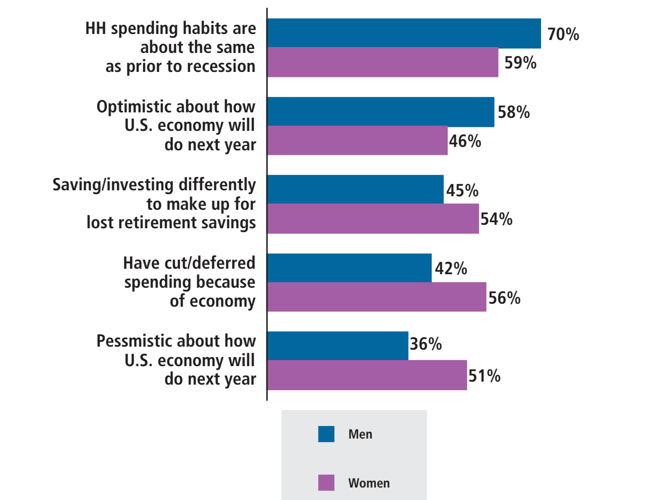
One area in which all affluent consumers have had their confidence shaken is the value of their homes; about four in 10 of each group say the recession has shown them that their primary homes are not stable assets.

More than half (54%) of affluent adults with $500,000 or more in investable assets (not including real estate) say their households have been directly affected by declining real estate values, according to a separate study by Mintel.

On the whole, however, affluent adults expect to prosper. Eight in 10 affluent Americans are optimistic about their personal financial prospects in the next five years, and three quarters are optimistic about the next year.

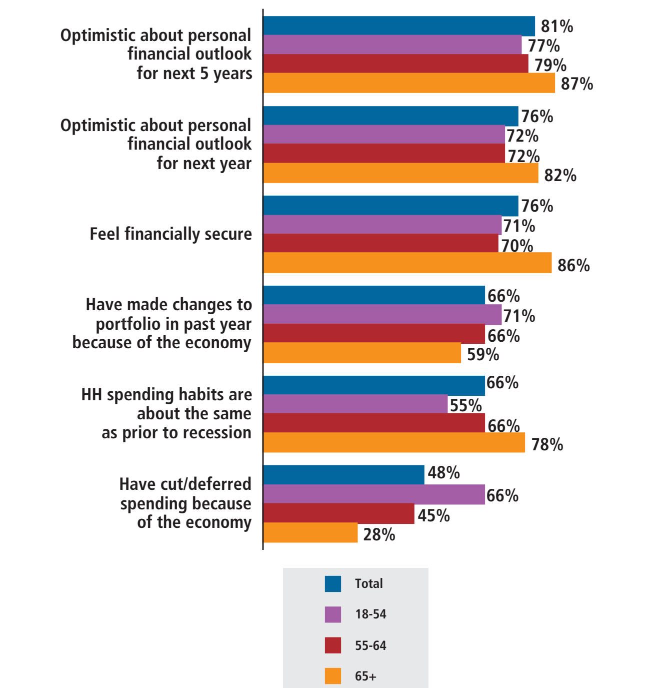
Affluent women are less likely than their male counterparts to feel financially secure, and they're more likely to have decreased or deferred spending because of the recession. Although the majority (72%) of female affluents are optimistic about their personal financial outlook, more than half (51%, compared to 36% of men) are pessimistic about how the U.S. economy will be doing a year from now.

AFFLUENT ADULTS' ATTITUDES ABOUT FINANCES, BY GENDER, 2011



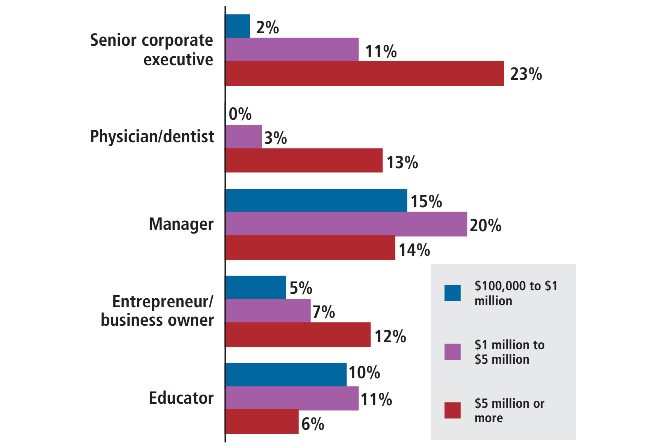
SOURCE: Mintel International Group

AFFLUENT ADULTS' ATTITUDES ABOUT FINANCES, BY AGE, 2011



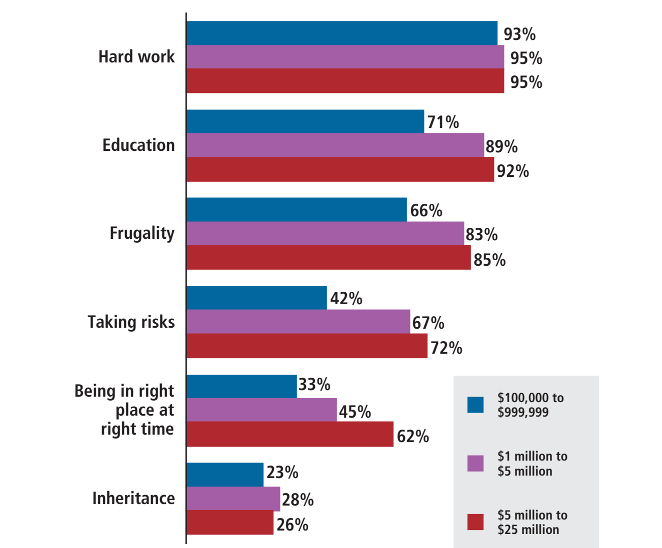
SOURCE: Mintel International Group

CURRENT OR FORMER OCCUPATIONS OF AFFLUENT AMERICANS, BY NET WORTH



SOURCE: Spectrem Group

HOW AFFLUENT AMERICANS ACQUIRED THEIR WEALTH



Note: Multiple responses allowed.

SOURCE: Spectrem Group

Affluent adults over age 65 are more optimistic about their finances than their younger counterparts. They're less likely to have changed spending habits or investment portfolios or to have lost confidence in financial institutions.

AVERAGE AGE OF AFFLUENT ADULTS, BY NET WORTH

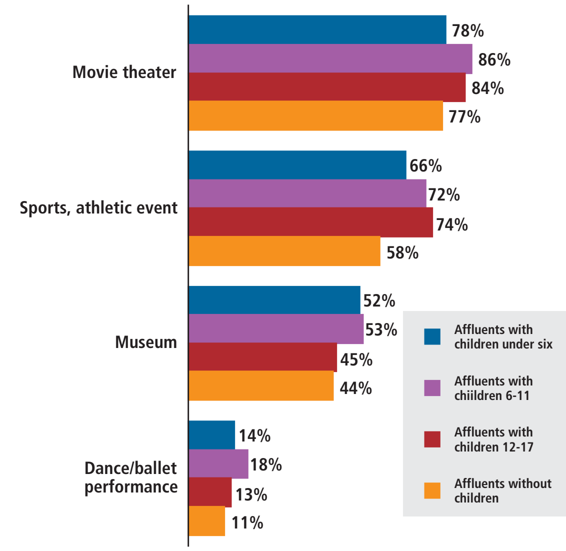
$100,000 to $1 million	58
$1 million to $5 million	63
$5 million or more	67

SOURCE: Spectrem Group, 2011

SOURCES: "Affluent Market Insights 2011," Spectrem Group, Tom Wynn, Director, 840 S. Waukegan Rd., #211, Lakeforest, IL 60045; 224-544-5353; info@spectrem.com; www.spectrem.com; www.millionairecorner.com. Price: $49.95.

"Wealth Management – U.S. – January 2011," Mintel International Group, Susan Menke, VP, Behavioral Economist, 351 W. Hubbard St., #801, Chicago, IL 60654; 312-932-0400; info@mintel.com; www.mintel.com. Price: £2,476 ($4,001).

ACTIVITIES ATTENDED BY AFFLUENT FAMILIES DURING THE PAST YEAR



SOURCE: Ipsos Mendelsohn

The Impact Children Have On Purchases, Preferences, And Shopping Behaviors Of Affluent Families

Interest in sports is a key sign that households include children, says Ipsos Mendelsohn's Donna Sabino. "Excluding Hispanics, no one cares about soccer unless they have children."

This is especially true among affluent families (defined as those with household incomes of $100,000 or more). Soccer and professional football are followed more closely by affluent families with children under age 18 than by affluent families without children.

As marketers seek out consumers who still are spending despite the uncertain economic climate, affluent families are an increasingly sought-after target.

Kid Power In Affluent Families

Affluent families only comprise 8% of total U.S. households, but they are responsible for 17% of all consumer expenditures, and 21% of total household income. But the preferences and habits of these 9.3 million households differ from those of middle- and lower-income families, as well as those of affluent households without children.

For one, kids dominate their world. Three in four affluent parents (73%) "definitely agree" that their families are their top priority in life, compared to 52% among affluent adults without children under age 18. Nearly three in 10 affluent families with children (28%) say they "almost always" purchase brands their children prefer.

One in two affluent families with children (50%) say the kitchen is the center of their family lives.

Affluent families favor gadgets that help enable them to save time and stay connected to their children. Affluent households with kids are more likely than those without children to own DVRs and to "always" use them to fast-forward through commercials. They are also more likely to access the Internet via smartphones, laptops, and/or tablets.

Affluent families with children spare no expense ensuring their homes are entertainment hubs. Seven in 10 (70%) watch TV or movies together as a family several times each week. The majority of these families own a flat LCD or plasma screen TV (76%) that's larger than 40 inches (72%) and is connected to a game console (73%).

Affluent families also spend time and money on other parts of their homes. One in three (35%) plan on redecorating or remodeling soon, and 53% regularly take on do-it-yourself projects.

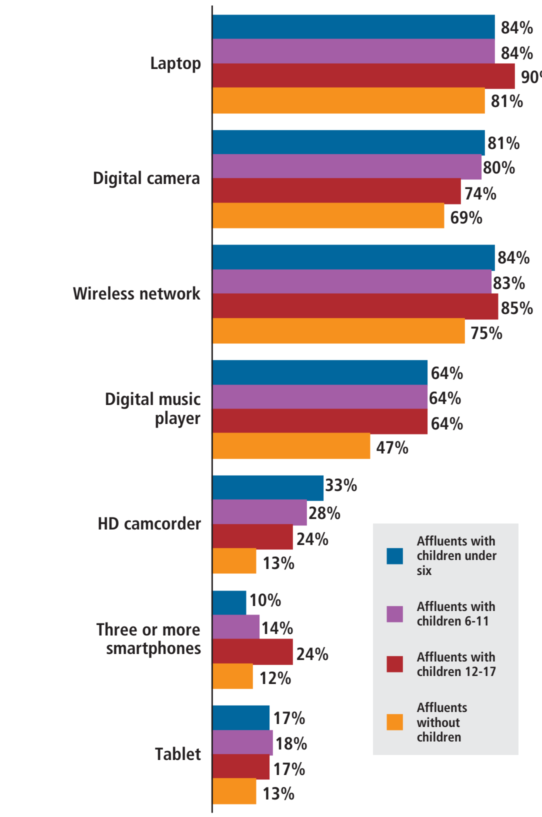
Affluent families with children think of themselves as influencers. Nearly half (47%) say they like to offer advice to others, and 62% spend time researching products before making a purchase.

The brand preferences, as well as shopping habits, are dividing affluent households with children compared to those without children. Nike, Nintendo and Sony products are more likely to be found in affluent homes with children than households without. Conversely, affluent households without children are more likely to favor L.L. Bean, Dockers, Liz Claiborne, and Tommy Bahama.

Although affluent shoppers with and without children are equally likely to visit Walmart, Target, and Best Buy, affluent families with children are more likely to shop at Kohl's, The Gap, and Apple. Affluent households without children are more likely to shop at Macy's, Nordstrom, Talbots, and Williams-Sonoma.

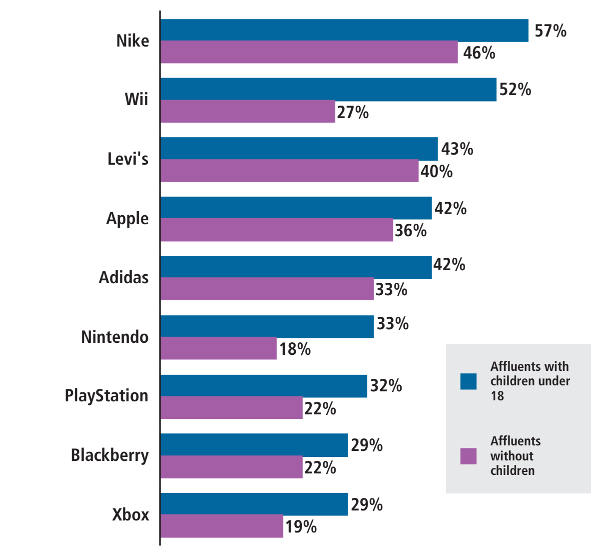
Affluent families with children also are more likely to have visited Chili's restaurants, Red Robin, and/or Texas Road-

DEVICES OWNED BY AFFLUENT FAMILIES, BY PRESENCE AND AGE OF CHILDREN IN HOUSEHOLD



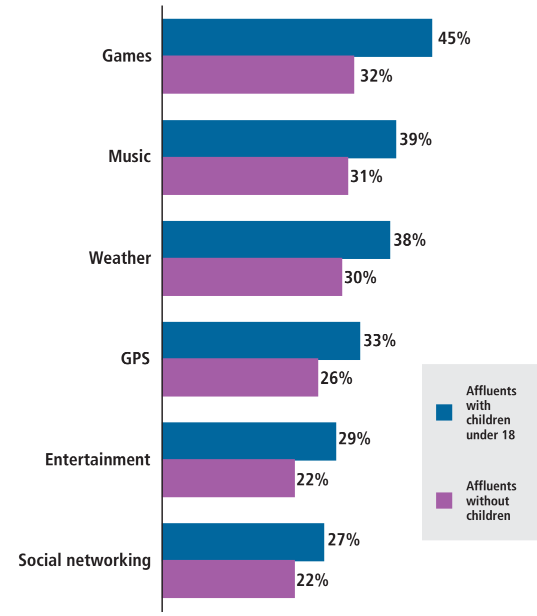
SOURCE: Ipsos Mendelsohn

BRANDS OWNED BY AFFLUENT HOUSEHOLDS, WITH AND WITHOUT CHILDREN



SOURCE: Ipsos Mendelsohn

SMARTPHONE APPS USED BY AFFLUENT HOUSEHOLDS, WITH VS.THOSE WITHOUT CHILDREN



SOURCE: Ipsos Mendelsohn

house within the past 12 months. It seems that children aren't much of an influencing factor in whether affluent families eat at IHOP (32% with children, 30% without).

SOURCE: Ipsos Mendelsohn, Donna Sabino, SVP Kids and Family Insights, 275 Seventh Ave., New York, NY 10001; 212-524-8242; donna.sabino@ipsos.com; www.ipsos.com.

The More Affluent The Household, The More Active It Is Online

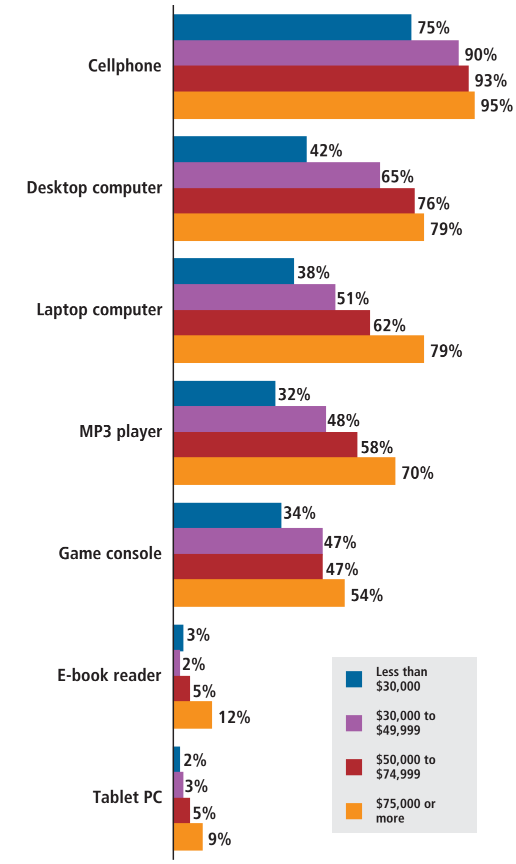
Households with annual incomes of $75,000 or greater are more likely than those with lesser annual incomes to have high-speed Internet access at home and own Internet-ready devices, according to Pew Internet & American Life Project.

Nearly all higher-income Americans (95%) use the Internet, and 87% have broadband access from home. Those numbers drop to 57% and 40%, respectively, among those with annual household incomes of less than $30,000.

Whereas Internet use and broadband access drop off significantly among lower income households, cell phone penetration does not:

- 95% of those in households with annual incomes of $75,000 or greater have a cell phone, as do
- 93% of those in households with annual incomes of $50,000 to $74,999;
- 90% of those in households with annual incomes of $30,000 to $49,999; and
- 75% of those in households with annual incomes of less than $30,000.

INTERNET-READY DEVICE OWNERSHIP, BY ANNUAL HOUSEHOLD INCOME, 2010



SOURCE: Pew Internet & American Life Project

Those with higher incomes go online more frequently. More than half of those with annual household incomes of $75,000 or more (55%) go online from home several times a day, compared to 44% of those in the $50,000 to $74,999 income range, 42% in the $30,000 to $49,999 income range, and 31% in the less than $30,000 income range.

SOURCE: "Use of the Internet In Higher-Income Households," 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.

factoids

➤ Four in 10 affluent consumers (with incomes of $200,000 or higher) who **follow brands** on social networks do so to get deals or discounts. *(eMarketer; phone: 212-763-6010)*

➤ Americans with household incomes of $100,000 or more spent $4,100 on vacation and other **personal travel** in 2010. *(Ipsos Mendelsohn; phone: 212-265-3200)*

automotive

High costs of gasoline are a continuing source of concern for U.S. consumers, but few are willing to consider alternative forms of transportation such as car-pooling or mass transit. Although new-car buyers claim that fuel efficiency is their number-one consideration after price, other studies find that fewer than a fifth of Americans would consider buying electric vehicles.

Price may be a barrier to entry; non-owners cite lower prices as the top factor that would motivate them to consider electric vehicles. Even so, fewer than a quarter say they'd switch to a hybrid or other fuel-efficient vehicle in response to rising gas prices.

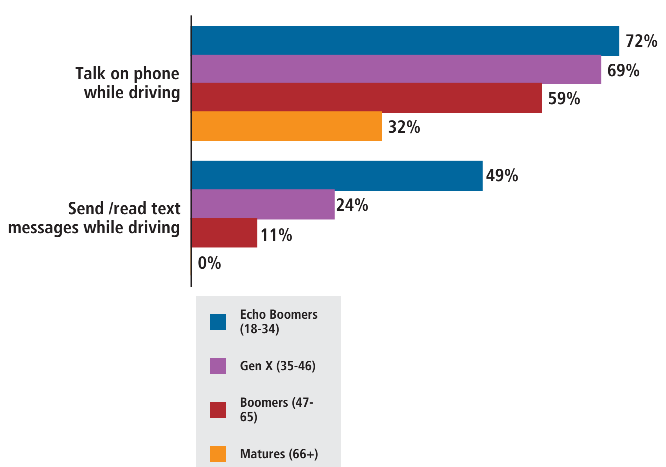
What Americans think drivers should do and what they actually do when behind the wheel are often at odds. About nine in 10 adults think using a cell phone while driving is unsafe, but almost seven in 10 have talked on their phones while driving in the past month, and almost a quarter have written and/or read text messages. Similarly, more than nine in 10 parents claim to be safe drivers, but more than eight in 10 teens say they've observed their parents driving carelessly.

Most Adults Think Using Cell Phone While Driving Is Dangerous, But Do It Anyway

Although nine in 10 adults are aware that using a cell phone while driving is unsafe, 60% of drivers who have cell phones talk while driving, and nearly a quarter (22%) send and/or read text messages while driving, according to the Harris Poll.Drivers under age 35 are more likely than those 35 and older to talk on the phone and/or text while driving. The majority of drivers (60%) who use their phones while at the wheel use handheld phones rather than hands-free devices, even though 77% say it's safer to use hands-free devices.

Almost four in 10 adults (38%) live in states requiring the use of hands-free headseats for cell phone use while driving, up from 14% in 2006. Almost half of adults think it's very dangerous to use a cell phone while driving, and another 26% think it's somewhat dangerous.

USE OF CELL PHONES FOR TALKING AND TEXTING WHILE DRIVING, BY GENERATION



SOURCE: Harris Poll

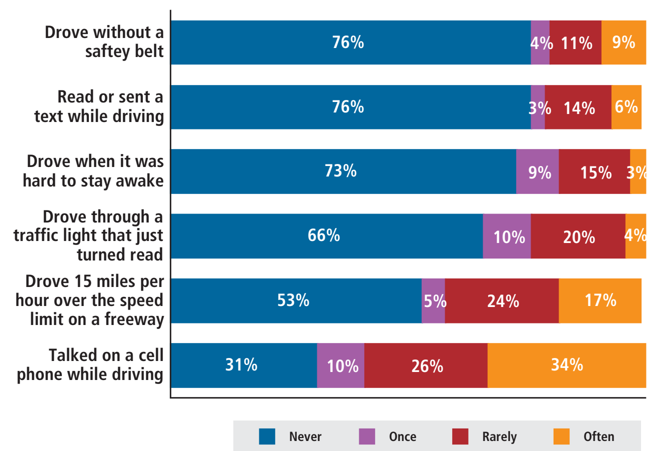
SOURCE: Harris Poll #84, July 20, 2011, Humphrey Taylor, Chairman, 161 Sixth Ave., New York, NY 10013; 585-272-8400; info@harrisinteractive.com; www.harrispollonline.com; www.harrisinteractive.com

Cell Phones And Driving Don't Mix, But Drivers Talk And Text Anyway

Drivers say the most serious offenses are texting or emailing while driving (88%) or driving under the influence of alcohol (87%), according to AAA Foundation. Nearly two thirds of drivers (62%) think that talking on a cell phone is a seriously dangerous. By comparison, half (50%) think that speeding is a seriously dangerous behavior.

The vast majority of drivers (69%) have talked on a cell phone while driving in the prior month, whereas far fewer have sent or read a text message while driving (24%). Nearly half (47%) have driven more than 15 miles per hour over the speed limit on a freeway.

RISKY BEHAVIORS DRIVERS ENGAGED IN DURING THE PRIOR MONTH, 2010



NOTE: Totals may not add up to 100% due to rounding.

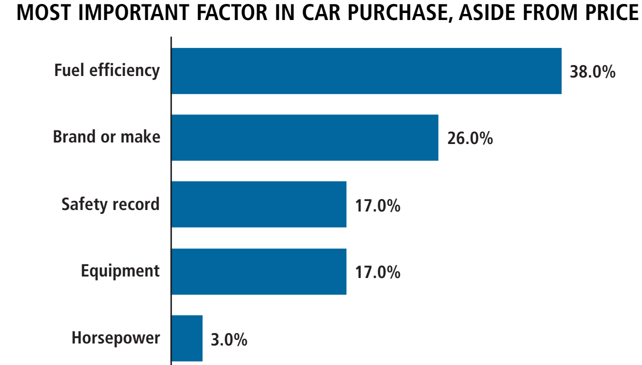
SOURCE: AAA Foundation

SOURCE: "2010 Traffic Safety Culture Index," AAA Foundation, Peter Kissinger, President, 607 14th St. NW, #201, Washington, DC 20005; 202-638-5944; www.aaafoundation.org.

Car Shoppers Want Fuel-Efficient Vehicles

When shopping for a car, fuel efficiency is the most important factor, aside from price, according to AdGenesis. Interest in fuel efficient vehicles increases with age; 44% of shoppers age 60 and older consider it most important, compared with 33% of 18-25-year-olds.

MOST IMPORTANT FACTOR IN CAR PURCHASE, ASIDE FROM PRICE



SOURCE: AdGenesis

SOURCE: AdGenesis, Michael Kelley, CMO, 242 W. 30th St., 8th Fl., New York, NY 10001; 646-350-4418; info@adgenesis.com; www.adgenesis.com

Sales Of Clean Diesel Vehicles Are Growing Faster Than Hybrid Sales

"Clean diesel" vehicles are projected to make up 7% of the total U.S. car market by 2017, according to J.D. Power & Associates data cited by the Diesel Technology Forum.

Sales of all diesel cars in the U.S. increased 37% between 2010 and 2011, compared to a 10% overall increase in auto sales during that time. Sales of clean diesel vehicles grew 20% between August 2010 and August 2011, according to HybridCars.com and Baum & Associates data cited. Electric-gasoline hybrid sales declined 12% during that time.

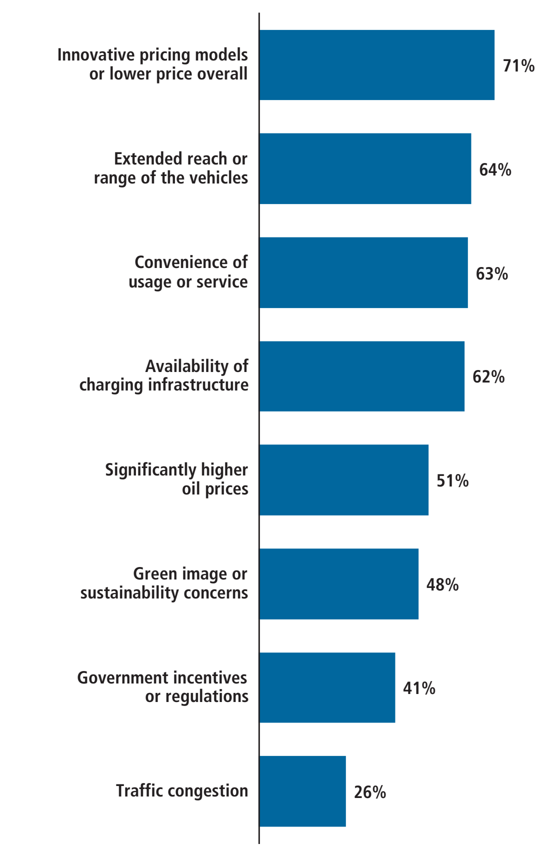
SOURCE: Diesel Technology Forum, Allen Schaeffer, Executive Director, 5291 Corporate Dr., #102, Frederick, MD 21703; 301-668-7230; aschaeffer@dieselforum.org; www.dieselforum.org. Price: Contact for information.

Many Barriers Affect Americans' Consideration Of Electric Vehicles

More than four in 10 drivers (42%) have never heard of or know very little about electric-only vehicles, according to IBM Institute for Business Value. Some 19% of drivers would consider buying an electric vehicle. Three in 10 (30%) would consider buying one that got less than 100 miles per charge — most get 50-100 miles. Four in 10 (40%) would pay 10% more for an electric vehicle than for a similar gas, diesel, or hybrid vehicle.

The cost to retrofit their residence for home charging for an electric vehicle is a major barrier to purchase, with only 13% willing to spend $1,000 to do so.

FACTORS THAT WOULD MOTIVATE DRIVERS TO SWITCH TO AN ELECTRIC VEHICLE, 2010



SOURCE: IBM Institute For Business Value

SOURCE: "Electric Cars Stir Interest But Face Obstacles," IBM Institute For Business Value, John Buscemi, 1 New Orchard Rd., Armonk, New York 10504; 914-766-2607; jbuscemi@us.ibm.com; www.ibm.com. Price: Call for information.

Drivers Want High-Tech Features

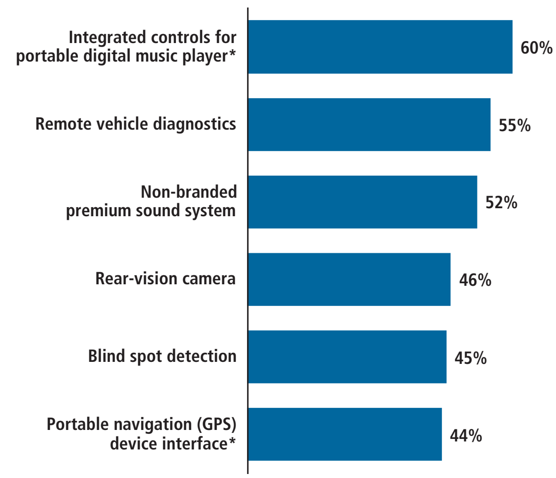
More than eight in 10 drivers (86%) who own smartphones use them while they're in the car, according to J.D. Power and Associates. The two most common uses are making/receiving calls and searching for directions.

Smartphone owners are interested in automotive technologies that help them use their phones more seamlessly while driving, as well as features that enhance safety.

After finding out the typical prices for the features, half (50%) would like to have wireless connectivity systems in their next vehicle, and 45% would like to be able to use their smartphones as remote controls for unlocking doors, opening the trunk, or starting the engine.

Among drivers who are currently using a free trial of satellite radio, 54% say they're definitely or probably planning to buy the service for their next vehicle.

CAR FEATURES DRIVERS ARE INTERESTED IN BUYING
(After finding out the price)



*Among those who own this type of device.

SOURCE: J.D. Power and Associates

SOURCE: "2011 U.S. Automotive Emerging Technologies Study," J.D. Power and Associates, Mike VanNieuwkuyk, Executive Director of Global Vehicle Research, 2625 Townsgate Rd., Westlake Village, CA 91361; 805-418-8000; information@jdpa.com; www.jdpower.com. Price: Contact for information.

Car Buyers Expect Pressure At Dealership

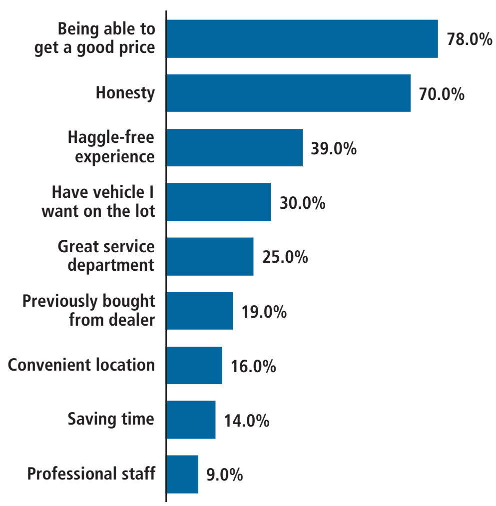
More than half of people shopping for new (58%) or used (53%) cars expect to be pressured by the dealer, and almost as many expect the dealer to have the upper hand during the process, according to TrueCar.

Being able to get a good price and feeling that they're dealing with an honest salesperson are the two most important factors when choosing a car dealership. More than eight in 10 (82%) feel that if they're trading in a vehicle or selling one to a dealer, they won't get a fair trade-in value or sales price (45% agree strongly, and 37% agree). Nine in 10 new-car shoppers (89%) and 86% of used-car shoppers feel that it would be helpful to have information about what other people who bought the same car within the past month paid for it. Nine in 10 new-car shoppers (91%) would find it valuable to have a dealer offer a no-haggle price upfront.

Fewer than half (45% of new-car shoppers and 37% of used-car shoppers) expect their car shopping experience to be pleasant. The majority of car shoppers trust the car brand they're buying (85% of buyers for both new and used cars), and expect to get a good deal (60% of new-car buyers and 62% of used-car buyers).

Still, getting to that good deal takes work, and 76% of new-car shoppers and 80% of used-car shoppers would value having a good friend in the car business.

MOST IMPORTANT FACTORS IN CHOOSING A CAR DEALERSHIP



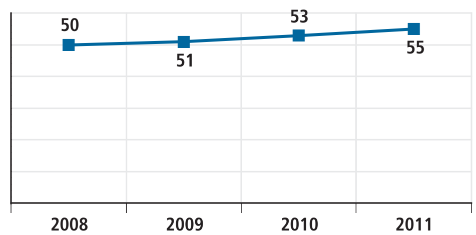
SOURCE: TrueCar

SOURCE: TrueCar, Jason White, EVP Marketing, 225 Santa Monica Blvd., 6th Fl., Santa Monica, CA 90401; 800-200-2000; info@truecar.com; www.truecar.com

Older Drivers Buy More Cars

The median age of car buyers has increased steadily over the past four years, according to J.D. Power & Associates. Drivers ages 65 and older buy 25% of new cars and light

MEDIAN AGES OF NEW-CAR BUYERS, 2008-2011



Note: Age is of principal driver on new-car registrations. Registrations are tracked over a 12-month period between May and April, so 2011 data reflects registrations from May 2009 to April 2010.

SOURCE: J.D. Power & Associates

VEHICLE BRANDS MORE LIKELY TO BE BOUGHT BY ADULTS AGES 65+ THAN BY THOSE YOUNGER THAN 65

Buick	336% more likely
Lincoln	217% more likely
Cadillac	158% more likely
Mercury (no longer manufactured)	121% more likely
Chrysler	106% more likely
Lexus	44% more likely
Saturn	43% more likely

SOURCE: J.D. Power & Associates

TOP 10 VEHICLE MAKES AND MODELS, 2011, DRIVERS UNDER AGE 65 VS. 65 AND OLDER

TOP 10 MAKES

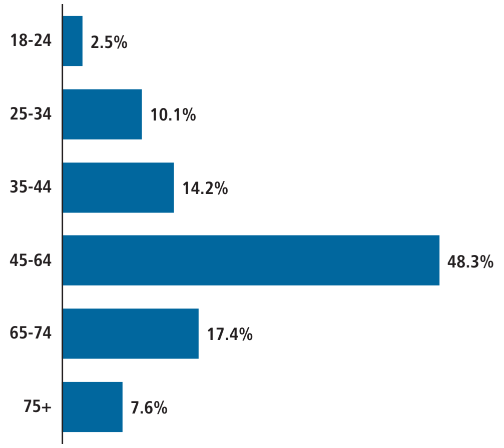
UNDER AGE 65	AGES 65 AND OLDER
Toyota	Toyota
Honda	Ford
Ford	Chevrolet
Chevrolet	Honda
Nissan	Nissan
Hyundai	Hyundai
Volkswagen	Lexus
Kia	Kia
Mazda	Buick
Subaru	GMC

TOP 10 MODELS

UNDER AGE 65	AGES 65 AND OLDER
Honda Civic (non-hybrid)	Toyota Camry (non-hybrid)
Toyota Camry (non-hybrid)	Honda Accord sedan
Toyota Corolla	Ford F-Series LD
Honda Accord sedan	Chevrolet Silverado LD
Ford F-Series LD	Honda CR-V
Honda CR-V	Toyota Corolla
Chevrolet Silverado LD	Honda Civic (non-hybrid)
Nissan Altima (non-hybrid)	Nissan Altima (non-hybrid)
Toyota RAV4	Ford Fusion (non-hybrid)
Ford Escape (non-hybrid)	Toyota Prius

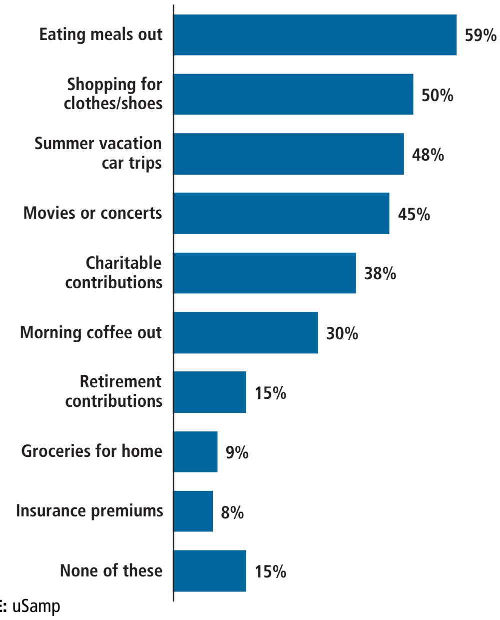
SOURCE: J.D. Power & Associates

NEW-CAR BUYERS, BY AGE, 2011



SOURCE: J.D. Power & Associates

EXPENDITURES AMERICANS WILL CURTAIL TO SAVE MONEY IF GAS PRICES REMAIN HIGH



SOURCE: uSamp

trucks, up from 18% in 2008. Drivers 45 and older account for 73% of all new car purchases, up from 66% in 2008.

Drivers 65 and older are more likely than younger drivers to favor midsize and larger cars. They're 25% more likely than drivers 64 or younger to buy domestic vehicles and 9% more likely to buy Korean vehicles.

While the top brands and models of cars are similar across age groups, older adults are much more likely than younger adults to buy certain brands.

SOURCE: "2011 Power Auto Offline Media Report," J.D. Power & Associates, John Tews, Director, Media Relations, 2625 Townsgate Rd., Westlake Village, CA 91361; 805-418-8599; media.relations@jdpa.com; www.jdpower.com. Price: This data was customized for RESEARCH ALERT. To purchase research, call sales at 805-418-8156 or email: information@jdpa.com.

People Are Keeping Cars Longer

Americans are keeping their cars longer than they used to, according to The NPD Group. More than half (52%) plan to keep their cars for five years or more. The majority expect their vehicles to need repairs or maintenance in 2011; 61% of these will leave the work to professionals. Do-it-yourselfers' sources of information include:

- Friends/family (57%);
- Repair manuals (46%);
- Mechanic (42%);
- Internet (including videos and social networks) (42%); and
- Store personnel (16%).

SOURCE: "2011 Aftermarket Outlook Survey," The NPD Group, David Portalatin, Industry Analyst, Automotive Aftermarket, 900 West Shore Rd., Port Washington, NY 11050; 516-625-0700; contactnpd@npd.com; www.npd.com. Price: Contact for information.

Gas Prices May Alter Summer Plans

Nearly three quarters of Americans (74%) are very concerned about rising gasoline prices, and almost two thirds (65%) expected to reduce the number of trips they take by car in the summer of 2011, according to uSamp.

Women (80%) are more likely than men (69%) to say they're very concerned, and those who live in the South are more likely than residents of other regions to be very concerned.

When asked about transportation alternatives they'd consider to contend with rising gas prices, the majority (69%) would choose to simply limit the trips they make by car. A quarter (25%) would carpool and 23% would consider getting a more fuel-efficient vehicle. Only a fifth (20%) would consider taking mass transit, and 15% would think about buying a hybrid or electric vehicle.

The younger the consumer, the more likely he or she is to consider alternatives such as carpooling and switching to hybrids or other fuel-efficient vehicles. Adults ages 25-34 and residents of the Northeast and West are most willing to take mass transit (likely because of greater availability in these regions).

When asked what they'd be willing to sacrifice in order to save money if gas prices remain at current levels or increase, women's top sacrifices are eating out (62%) and shopping for clothes or shoes (57%); men's are eating out (57%) and summer car trips (46%). Nearly a quarter of adults age 55 and older (24%) say they're not willing to sacrifice anything, compared to 12% each of 18-24 and 25-34-year-olds.

Most Americans expect gas prices to increase by at least 30 cents per gallon in the next year; 55% expect prices to increase by 50 cents or more.

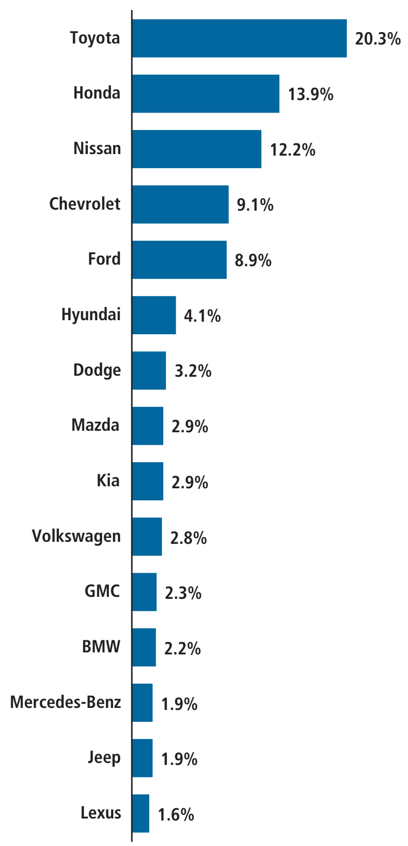
SOURCE: "Gasoline Usage Survey, May 2011," uSamp, Gregg Lavin, Cofounder and President, 16501 Ventura Blvd., #250, Encino, CA 91436; 818-524-1218; sales@usamp.com; www.usamp.com

Hispanic Vehicle Brand Preferences: Toyota Rules, But Buick Is Climbing

Hispanics' automotive purchases account for 8.7% of the total market, according to Polk. The automotive market is recovering faster among Hispanics — Hispanic purchases rose nearly 7% in the first three quarters of 2010, compared to a 4% increase over the same period for the overall U.S. automotive market.

Toyota dominates the Hispanic market with more than a 20% share. By comparison, the top three American auto brands — Chevrolet, Ford, and Dodge — account for a combined 21% share. Although Buick is not among Hispanics' top 15 brands, its sales to Hispanics rose by 83% over the prior year. Cadillac, Hyundai, GMC, Kia, and Infinity have also increased their sales to Hispanics by 25% or more.

SALES OF VEHICLES TO HISPANICS, BY BRAND, JANUARY 2010 - SEPTEMBER 2010



SOURCE: Polk

SOURCE: "Hispanics and the U.S. Auto Market," Polk, Andrew Price, VP Automotive Retail Solutions, 26955 Northwestern Hwy., Southfield, MI 48033; 800-464-7655; andrew_price@polk.com; www.polk.com. Price: Call for information.

How Teens Learn To Drive

Teens learn how to drive by practicing an average 3.21 days and 1.60 hours each week, according to the AAA Foundation for Traffic Safety. Some 40% of the practice happens during the weekend. Most teens (50%) practice on two cars, primarily a passenger or sedan type (50%); 26% learn via a minivan, 18% on an SUV, and 6% via a pick-up truck.

Six in 10 teens (60%) practice driving outside the standard driver education course. Mom is their main teacher, though she is often just winging it. Only 8% of parents receive materials that offer advice for parents of beginning drivers. Parents say the top teen driving mistakes involve turning and braking. However, after two weeks, parents typically feel their teen is ready to drive unsupervised in light traffic or on a two-lane country road.

A few parents don't provide their undivided attention in teaching their teen to drive. Some 4% operate a cellphone or PDA, 3% read or handle papers, and 2% eat or drink. Teens, conversely, are on their best behavior, reporting no distracting habits, including 74% who drive with zero or barely audible music.

Once teens receive their license, they are more likely to share a vehicle with a parent or sibling than get their own (60% vs. 40%). They typically drive a passenger car (60%) or SUV (17%).

WHERE TEENS LEARN TO DRIVE

Empty parking lot	40%
Local neighborhood	10%
Their driveway	8%
Gravel road in the country	2%

SOURCE: AAA Foundation for Traffic Safety

SOURCE: AAA Foundation for Traffic Safety, 607 14th St., NW, #201, Washington, DC 20005; 202-638-5944; www.aaafoundation.org.

Teens Think Texting While Driving Isn't As Dangerous As Drinking And Driving

The majority of 14-17-year-olds (55%) strongly agree that drinking while driving can be fatal, compared to 36% who strongly believe texting while driving can kill, according to State Farm and Harris Interactive. Similarly, 78% of 14-17-year-olds strongly agree drinking while driving can result in an accident, compared to 63% who agree that texting while driving can cause accidents.

Teens are more likely to feel they can narrowly avoid accidents while texting than while drinking behind the wheel (55% vs. 36%). Notably, teens who have never texted while driving are more likely than those who have texted while driving to feel this behavior can cause an accident (73% vs. 52%).

Teens who talk with their parents about driving are more likely than those who don't discuss driving issues with their parents to feel texting (67% vs. 56%) and drinking (82% vs. 72%) can result in accidents.

SOURCES: Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

State Farm, Laurette Stiles, VP Strategic Resources, One State Farm Plz., Bloomington, IL 61710; 309-766-2311; www.statefarm.com.

Parents Make Teen Drivers Contribute Car Maintenance Money

Teen drivers bump their parent's insurance premiums up an average $800 a year, according to Nationwide Insurance. Seven in 10 parents (70%) add their teen to their policies and typically pay two thirds of costs associated with driving, which include gas and insurance. Four in 10 parents (41%) pay all costs, while 32% split costs with their teens. Only one in six parents say their teens pay for all of their own driving expenses.

Auto insurance is parents' top concern when it comes to teen driving expenses (66%), followed by increased premiums if their teen gets into an accident (55%), and gas (54%).

Parents are making sacrifices in order to afford the added expense of a teen driver, including cutting back on entertainment expenses (40%), eating out less (38%), and forgoing vacations (35%). Two in 10 parents (21%) say their teens drive the family car instead of getting their own vehicles; 15% have decided against purchasing their teen a car as originally planned.

SOURCE: Nationwide, Elizabeth Giannetti, One Nationwide Plz., Columbus, OH 43215; 614-249-7705; giannee@nationwide.com; www.nationwide.com.

Teens And Parents Diverge On Driving

Nearly all parents (95%) believe they're safe drivers, yet 82% of their teens say they see their parents behave carelessly when driving, according to Ford. One in two parents (51%) admit their teens have asked them to slow down, stop talking or texting, or generally drive more safely.

Parents' worst offenses, according to teens, include distraction due to eating or drinking (57%), talking or texting without a headset (42%), and grooming or applying makeup (32%). Young people look to their parents for driving education. Three in four tweens (78%) and 66% of teens say their parents have "a lot of influence" on the way they drive, and an additional 66% of teens say their parents' actions often speak loudest. Only one in four (25%) have had formal driving education.

SOURCE: Ford, Susan Krusel, 16800 Executive Plaza Dr., Dearborn, MI 48126; 313-322-7998; skrusel@ford.com; www.ford.com.

Kids Are Safer Driving With Gramps Than With Parents

Children under age 16 riding in a car with a grandparent are 30% less likely to be injured in a car accident than children riding with parents; children riding with a parent have a 5% increased risk of being injured in an accident, according to a study published in the journal *Pediatrics*. In general, adults over age 65 are most likely to be involved in automobile accidents.

After adjusting the data to account for car model and the severity of the crash, researchers find children who ride with their grandparents are 50% less likely than those riding with parents to be injured in an accident.

However, grandparents aren't perfect. Some 25% of the cars driven by grandparents lack "optimal" child restraint, and 2% of grandparents skip child restraints entirely.

SOURCE: *Pediatrics*, Fred Henretig, Author, Children's Hospital of Philadelphia; 215-590-4713; henretig@email.chop.edu.

factoids

➤ Two thirds of parents of teens (66%) are concerned about the cost of **auto insurance** for their sons/daughters. *(Nationwide Insurance; phone: 614-249-7705)*

➤ **Teen drivers** cost their families an average of $3,100 per year in auto insurance, gasoline, and other associated expenses. *(Nationwide Insurance; phone: 614-249-7705)*

➤ Seven in 10 parents (70%) of **teen drivers** add their teens to their own auto insurance policies. *(Nationwide Insurance; phone: 614-249-7705)*

➤ Six in 10 radio listeners in the U.S. and Canada (61%) say their primary vehicles include **connectivity** for mobile phones or MP3 players. *(Jacobs Media; phone: 248-353-9030)*

➤ One in 10 **cars** on the road have their "check engine" lights on. *(*Men's Health *magazine; phone: 610-967-5171)*

➤ More than a quarter (27%) of U.S. consumers say they're less likely to buy Japanese- or Korean-made **cars** since the 2011 tsunami because they're worried about parts becoming scarce or expensive. *(TNS; phone: 310-545-1746)*

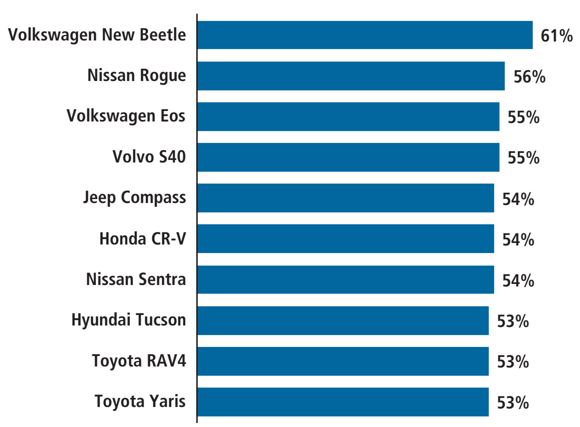
➤ U.S. consumers spent an average of $192 on **gasoline** in February 2011, up from $179 in February 2010. *(CredAbility; phone: 404-260-3108)*

➤ More than eight in 10 U.S. consumers (85%) say they would be interested in buying a plug-in **electric vehicle**. *(Nielsen; phone: 646-654-5000)*

➤ A man driving a "hot" car is considered 15% more **attractive** to women than the same man would be if he were driving a "neutral" car. *(Dr. Michael Dunn, University of Wales; phone: 011-44-29-2041-7323)*

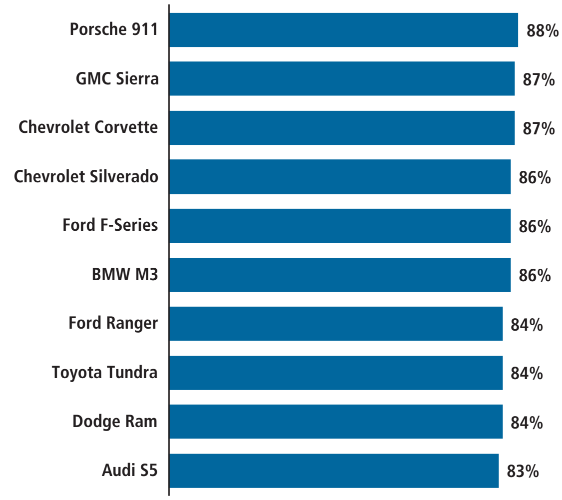
➤ 28% of teens have sent text messages while **driving**; 35% of teens who have their own cars have done so. *(AAA; phone: 516-873-2364)*

➤ **CAR MAKES/MODELS WITH HIGHEST PROPORTIONS OF FEMALE BUYERS**



SOURCE: TrueCar.com

➤ **CAR MAKES/MODELS WITH HIGHEST PROPORTIONS OF MALE BUYERS**



SOURCE: TrueCar.com, Jesse Toprak, VP Industry Trends and Insights, 225 Santa Monica Blvd., 12th Fl., Santa Monica, CA 90401; phone: 800-200-2000; info@truecar.com; www.truecar.com

➤ Fifty-eight percent of drivers in Washington state — 77% of men and 45% of women — are comfortable **driving in snow**. *(PEMCO Insurance; phone: 206-628-4000)*

➤ More than seven in 10 Gen Yers (71%), aged 19-31, prefer **import car brands**, up from 49% in 2009. *(Deloitte; email: evela@deloitte.com)*

➤ Gen Yers (82%) are more excited than Gen Xers (71%) and Baby Boomers (66%) about shopping for a **new vehicle**. *(Deloitte; phone: 203-708-4406)*

➤ People with household incomes of $100,000 or more are 19% more likely than those with lower incomes to click on online **automotive offers**. *(AdGenesis; phone: 646-350-4418)*

consumer electronics

Ownership of consumer electronics varies considerably by age, education, income, and — for some products — gender and race/ethnicity. Younger generations are not only early adopters of tech products in general; they're also strongly drawn to portable devices — a preference that begins early. Children ages 2-5 are more likely to know how to play with smartphone apps than they are to know how to tie their shoes.

Most of the consumer electronics on the wish lists of children and teens are portable devices, as are the majority of the electronics products they already own. Among adults, MP3 player ownership is most strongly tied to age; nearly three quarters of Millennials own them, while fewer than half of adults 50 and older do. Millennials are the only group of adults who are more likely to own laptops than desktop computers.

Ownership of some devices — such as eReaders — varies more by income and education than by age. Although few Americans own eReaders or tablets, ownership is growing rapidly, especially (in the case of eReaders) among college graduates, Hispanics, and families with children.

There are also gender differences in ownership of electronics and in purchase influences. Among parents, moms are more likely than dads to ask their spouses and/or kids for opinions/advice when buying electronic devices, while dads are more likely than moms to ask friends or colleagues, and to read reviews.

More than a third of teens and tweens say their parents sometimes buy consumer electronics products based on their recommendations, but only half that many parents admit to being swayed by their kids' opinions.

Women And Men Rely On Familiar Brands For Consumer Electronics

Brand familiarity is the key purchase driver for both men and women when shopping for consumer electronics, reports NPD Group.

Men are more likely than women to buy consumer electronics items because they're becoming more popular or are sold as part of a package deal or bundle.

Women are more likely to seek products that will work with others they already own and offer good value. Women also want consumer electronics that look fashionable, a consideration that's not on men's radar.

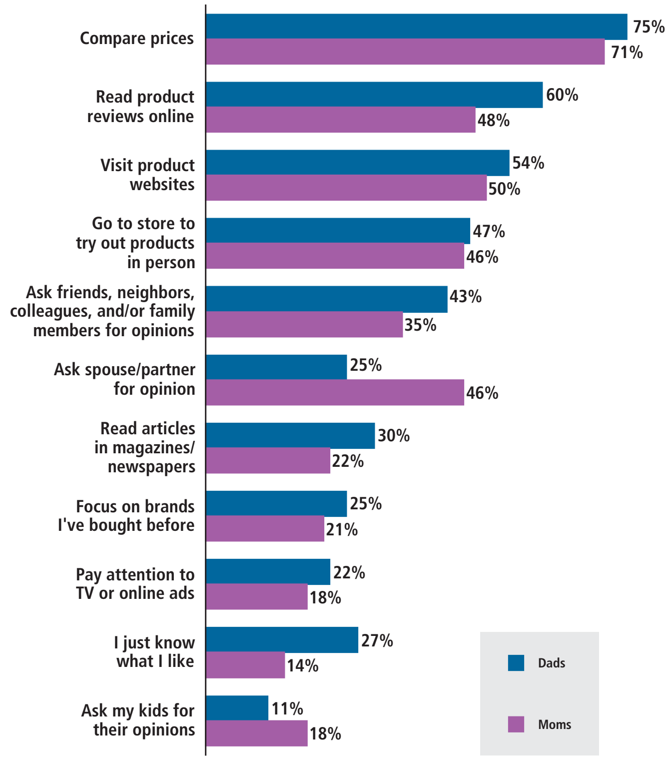
When trying to decide which brand or model of electronics or computer equipment to buy, more than seven in 10 dads (75%) and moms (71%) find it helpful to compare prices, according to Harris Interactive data provided specially for Research Alert.

Moms and dads are equally likely to visit product websites, but more dads than moms read online reviews.

Dads are more likely than moms to ask friends, neighbors, colleagues, or family members for their opinions on consumer electronics/computers, while moms are more likely than dads to ask their spouses/partners or their kids.

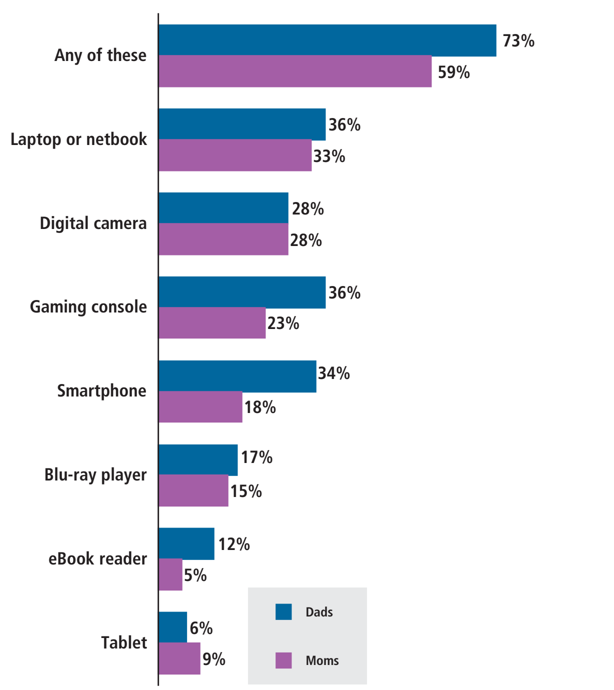
Parents of teens (ages 13-17) are twice as likely as parents of tweens (ages 8-12) to ask for their children's opinions (18% vs. 9%).

HOW MOMS AND DADS CHOOSE WHICH BRANDS/MODELS OF COMPUTERS AND/OR ELECTRONICS TO BUY



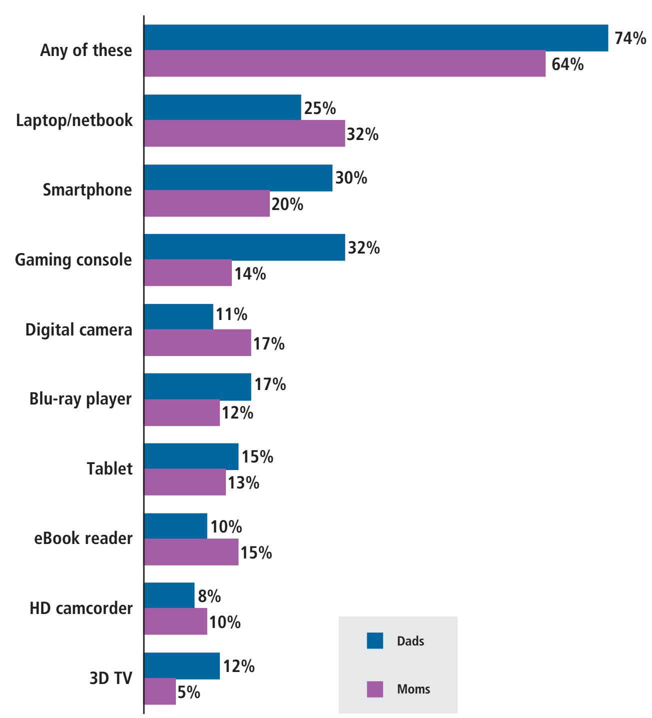
SOURCE: Harris Interactive

COMPUTERS/ELECTRONICS PURCHASED BY HOUSEHOLD IN PAST YEAR, ACCORDING TO MOMS AND DADS



SOURCE: Harris Interactive

COMPUTERS/ELECTRONICS MOMS AND DADS SAY THEIR HOUSEHOLDS WILL PROBABLY BUY IN THE NEXT YEAR



SOURCE: Harris Interactive

More than seven in 10 dads say their households have purchased computers or electronic devices in the past year, compared to about six in 10 moms who say so.

SOURCES: "The Brand Landscape Report 2011," NPD Group, Dee Warmath, SVP Retail Insights and Global Product Development, 900 West Shore Rd., Port Washington, NY 11050; 516-625-0700; contactnpd@npd.com; also, Beth Boyle; 516-625-4603; beth.boyle@npd.com; www.npd.com. Price: Contact for information.

Harris Interactive, custom tabulations for EPM Communications, December 2010, 161 Sixth Ave., New York, NY 10010; 585-272-8400; info@harrisinteractive.com; www.harrisinteractive.com. Price: Contact for information.

Gadget Usage Varies By Generation

Ownership and usage of electronic devices varies significantly by generation, according to the Pew Research Center.

For example, while more than eight in 10 adults (85%) own cell phones, and 90% live in households with at least one working mobile phone, Millennial and Gen X adults use their phones very differently from Boomers and members of the Silent Generation. For some types of devices, there are also significant differences in ownership and usage habits of Millennials vs. Gen Xers.

Taking photos and sending/receiving texts are the most universally used mobile phone functions, apart from talking. More than half of all mobile phone owners under age 75 take photos with their phones. Texting is more widely used by adults ages 55 and younger, but about half of Older Boomers (ages 57-65) use it, too.

Among all the devices studied by Pew — cell phones, desktop and laptop computers, MP3 players, game consoles, e-Book readers, and tablets — MP3 players show the widest split in ownership by age. Nearly three quarters of Millennials own iPods or other MP3 players, but fewer than half of adults over 50 do.

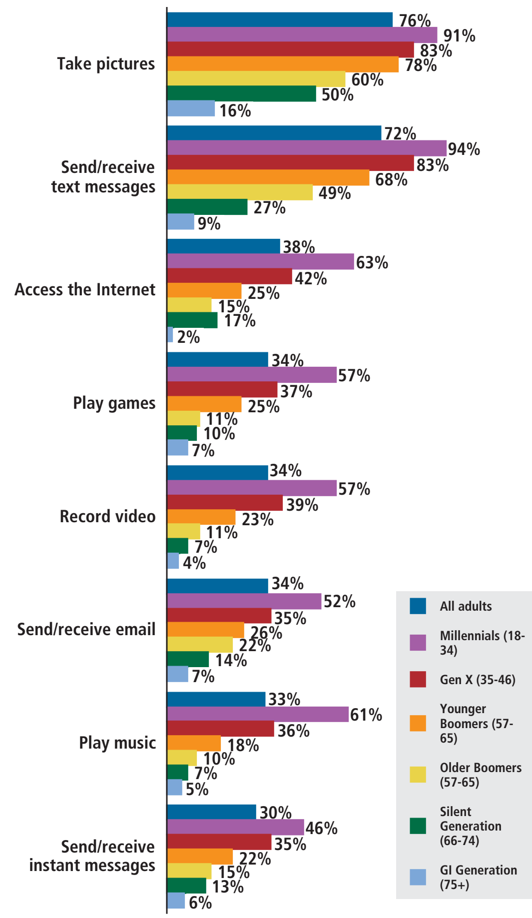
Millennials are the only generation more likely to own laptops than desktop computers. Interestingly, while there's a sharp drop-off in ownership of MP3 players between Millennials and Gen Xers, the two groups are equally likely to own another type of entertainment device — gaming consoles.

There are few age differences in ownership of e-Book readers; income and education levels are more significant predictors of e-Book use.

Millennials are 57% more likely than adults of other ages to look at and/or respond to ads sent by text message, finds a separate study by GfK MRI. One in 10 Millennials who own cell phones have viewed ads sent via text messaging in the past 30 days, and 5% have responded to such ads or bought products via text during that time. By comparison, 6% of all mobile phone owners have looked at text ads and 3% have responded to them in the past 30 days.

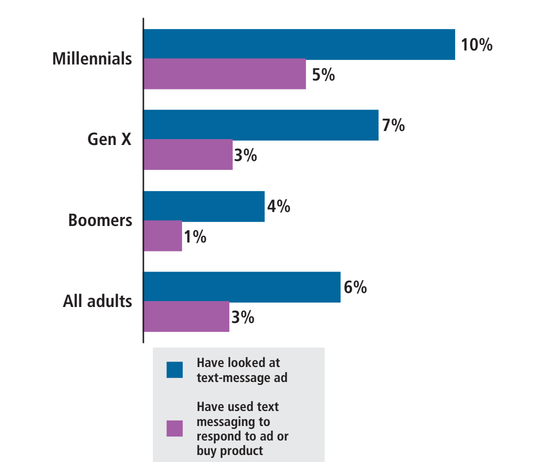
The younger the mobile phone owner, the more likely he/she is to read or respond to text-message ads. Receptivity to text-messaging ads is also influenced by the owner's relationship with his/her phone.

USE OF MOBILE PHONE FEATURES BEYOND TALK, BY GENERATION



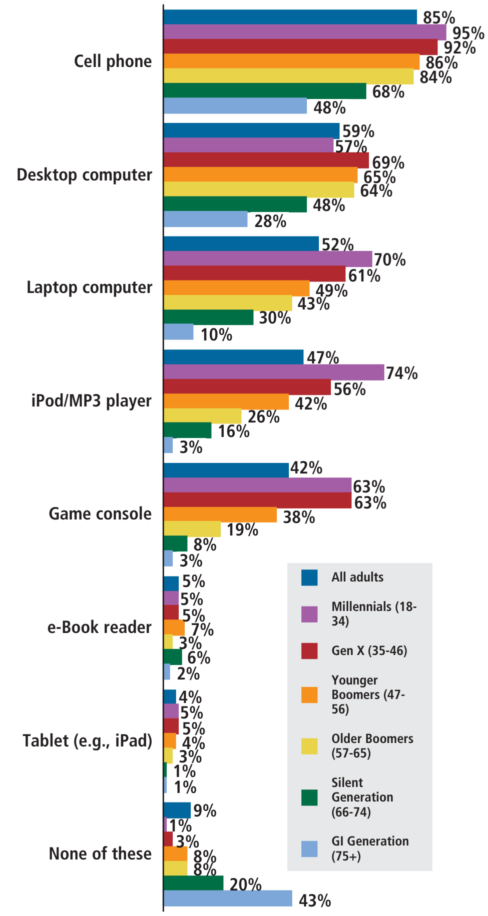
SOURCE: Pew Research Center

RECEPTIVITY TO TEXT-MESSAGING ADS, BY GENERATION



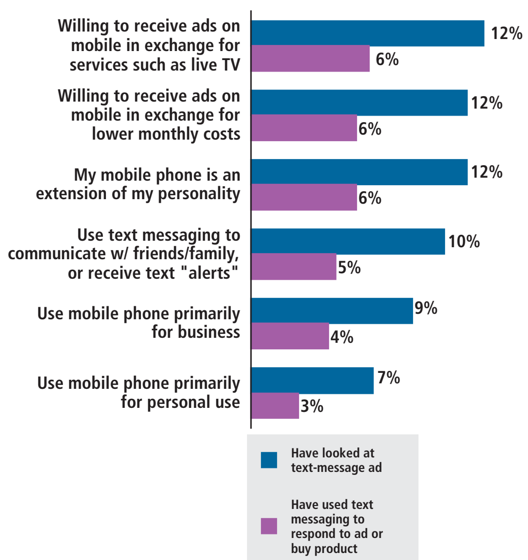
SOURCE: GfK MRI

OWNERSHIP OF ELECTRONIC DEVICES, BY GENERATION



SOURCE: Pew Research Center

RECEPTIVITY TO TEXT-MESSAGING ADS, BY CELL PHONE HABITS & ATTITUDES



SOURCE: GfK MRI

People who use text messaging regularly for communication, people who feel that their phones are extensions of their personalities, and those who are willing to receive ads on their phones in exchange for free services or discounts are more receptive to text-message advertising.

Interestingly, people who use their phones primarily for business are more receptive to these ads than those who use their phones mostly for personal use.

SOURCES: "Generations and Their Gadgets, February 2011," Pew Research Center, Internet & American Life Project, Kathryn Zickuhr, Web Coordinator, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; kzickhur@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

"Survey of the American Consumer, Wave 63, March-October 2010," GfK MRI, Anne Marie Kelly, SVP Marketing & Strategic Planning, 75 Ninth Ave., 5th Fl., New York, NY 10011; 212-884-9200; annemarie.kelly@gfkmri.com; www.gfkmri.com. Price: Contact for information.

E-Reader Ownership Doubled In Six Months

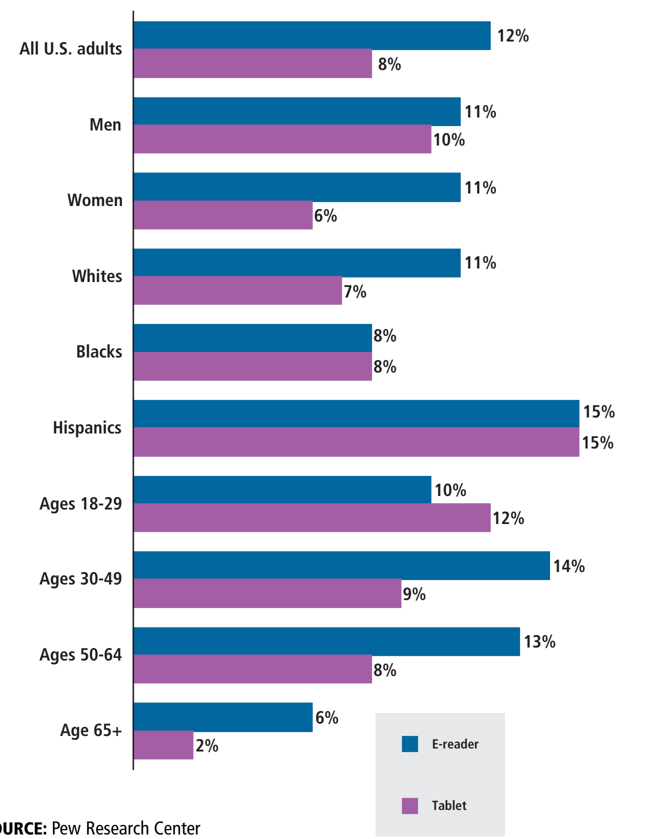
Ownership of e-readers in the U.S. doubled from 6% to 12% between November 2010 and May 2011, according to the Pew Research Center. Tablet ownership grew more slowly, from 5% to 8% over the same period. Hispanics are more likely than non-Hispanics to own e-readers, and ownership among this group tripled between November 2010 and May 2011.

Adults ages 30-49 (14%) and 50-64 (13%) are more likely than members of other age groups to own e-readers; ownership is growing fastest among 30-49-year-olds (up 180% between November 2010 and May 2011; calculations by RESEARCH ALERT).

College graduates are much more likely than those with less education to own e-readers, and ownership is rising rapidly among this group. In November 2010, 8% of college grads owned e-readers; by May 2011, 22% owned them. Adults with children under 18 are more likely than those without children to own e-readers (16% vs. 10%), and ownership among parents grew 167% between November 2010 and May 2011.

Nearly a quarter (24%) of those with household incomes of $75,000 or more own e-readers in May 2011, up from 12% in November 2010.

U.S. ADULTS WHO OWN E-READERS AND TABLETS, BY SELECTED DEMOGRAPHIC CHARACTERSTICS, MAY 2011



SOURCE: Pew Research Center

Men and women are equally likely to own e-readers, but men are more likely than women to own tablets. Tablet ownership skews younger than e-reader ownership; 18-29-year-olds are more likely than older adults to own them.

As with e-readers, high-income, highly educated adults are more likely to own tablets than those with lower incomes or less education. Hispanics are more likely to own tablets, and ownership levels are on par with Hispanics' ownership of e-readers (15% each).

Just 3% of U.S. adults own both devices; 9% own e-readers but not tablets, and 5% own tablets but not e-readers.

SOURCE: "E-reader Ownership Doubles in Six Months," June 27, 2011, Pew Research Center, Kristen Purcell, Associate Director for Research, Pew Internet and American Life Project, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; info@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

Readers Of E-Books Buy Fewer Print Titles

Women account for 60% of readers of e-books but only 56% of "Power Buyers" — those who buy e-books at least once a week, according to The Book Industry Study Group. Almost a fifth (18%) of those who read e-books are Power Buyers. Readers ages 30-44 comprise 28% of overall readers and 40% of Power Buyers.

Seven in 10 Power Buyers (70%) use dedicated e-book readers as their preferred reading device, as do 61% of overall readers of electronic books. Two in 10 Power Buyers prefer to read on iPads or other tablets.

Nearly half of users of e-books have reduced their purchases of print titles since they began reading electronic books; 48% are buying fewer paperbacks and 42% are buying fewer hardbacks. Four in 10 (44%) say they're buying more books overall since they began reading e-books, and 35% say they're spending more money on books.

The top influences on consumers' e-book buying decisions are seeing low prices in ads (32% have bought e-books as a result), receiving free/promotional sample chapters (32%), and reading online book reviews (31%).

E-book features consumers would like (but don't currently have on the specific device they own) include the ability to view color photos and graphics, the opportunity to buy an e-book before the print version goes on sale, the ability to give away or lend an e-book when they're finished reading it, the ability to buy bundled electronic and audio books, the ability to view video, and the ability to access embedded links to related information.

SOURCE: "Consumer Attitudes Toward E-Book Reading, Volume 2" April 2011, Book Industry Study Group (BISG), Mindy Im, Director of Marketing, 370 Lexington Ave., #900, New York, NY 10017; 646-336-7141, x13; mindy@bisg.org; www.big.org. Price: $3,300 for BISG members; $6,500 for non-members.

Family Electronics: Who Are The Key Purchase Influencers And Which Family Members Know Most About Tech Devices?

Today's tweens and teens are tech-savvy and they know it. Teens feel they possess superior knowledge over their parents regarding the videogame console (85%), smartphone (57%), laptop (55%), and 3D TV (35%), according to About.com's ConsumerSearch Survey and Harris Interactive. "It's not too surprising that teens claim they know a lot about technology, but it is interesting that teens know so much about some items, [such as] 3D TVs considering [these devices] aren't on their personal horizon," says About.com's Christine Frietchen.

Teen, Tween Tech Experts

Tweens are slightly less confident than teens in comparing their knowledge with that of their parents: less than one in five claim to know more about the smartphone (15%), tablet computer (14%), and 3D TV (11%). "The big differences between tweens and teens are that tweens are more sensitive to advertising and teens are far more price sensitive than I guessed they would be," she says. Teens are more than twice as likely as tweens (67% vs. 23%) to claim price determines their brand preference.

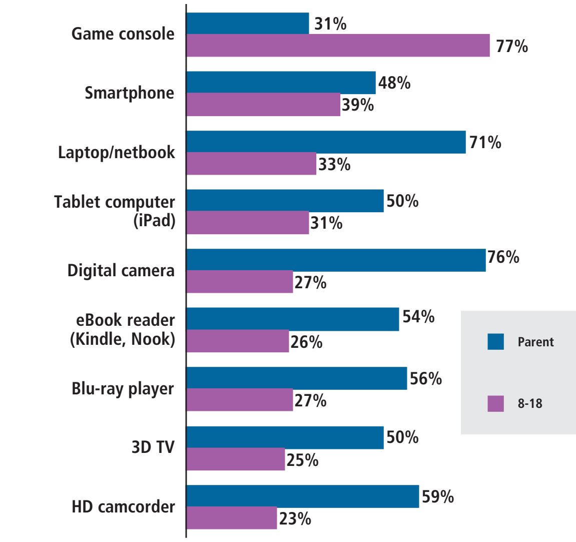
Young people's technological knowledge reflects broader cultural changes, says Frietchen. "Tweens and teens know a lot less than their parents about digital cameras and camcorders, but it makes sense since they just use their smartphones to take pictures and record video," she says.

Girls are just as likely as boys to know about the latest gadgets. "There's a lot said about girls not being into technology and science, but we find that they are far more confident about technology — 10 points in some cases — than boys," says Freitchen. Girls are more likely than boys to feel they know more than their parents about laptops (42% vs. 33%), digital cameras (43% vs. 27%), and smartphones (44% vs. 34%).

"A Battle Of Egos"

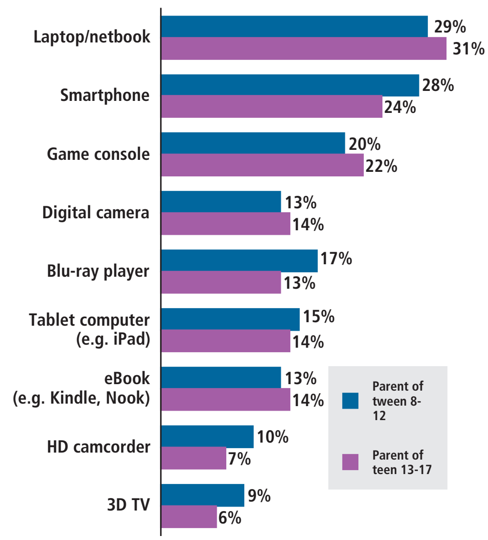
While tweens and teens claim to be tech experts, there's a disconnect between parents and their children on exactly how much influence either has over the elec-

PARENT OR CHILD WHO CONSIDERS SELF MORE KNOWLEDGEABLE THAN THE OTHER ABOUT ELECTRONICS/COMPUTERS



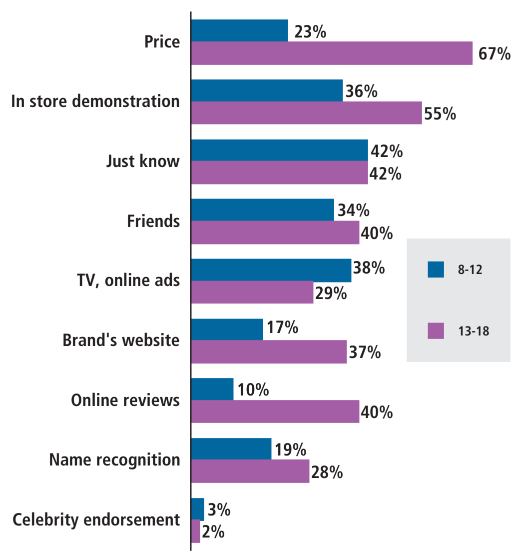
SOURCES: About.com, Harris Interactive

EXPECTED FAMILY ELECTRONICS/COMPUTER PURCHASES IN 2011, ACCORDING TO PARENTS, BY AGE OF CHILDREN



SOURCES: About.com, Harris Interactive

HOW TWEENS, TEENS DETERMINE THEIR PREFERRED ELECTRONICS/COMPUTER BRANDS



SOURCES: About.com, Harris Interactive tronic or computer purchase. "It's a battle of egos," jokes Frietchen.

One in three 8-18-year-olds (34%) say their parents sometimes purchase his or her electronic and computer recommendations, whereas only 15% of parents say they seek their kids' opinions before they purchase electronics or computers. Moms are slightly more likely than dads to seek their kid's input (18% vs, 11%). Parents primarily focus on price (72%), reading reviews online (53%), and visiting product websites (51%) before making electronic or computer purchases.

The Celebrity Factor

Despite the fact that Ashton Kutcher pitches Nikon cameras and Justin Timberlake stars in ads for Sony Vaio, celebrity endorsements are extremely ineffective in swaying brand preference and purchase intent among both parents and their children.

"I am surprised it is so low (1%-3%) since we see so many [celebrity] endorsements. I don't think Polaroid would pay Lady Gaga quite so much money if they knew they really don't get much out of it," says Freitchen.

SOURCESS: About.com, ConsumerSearch Survey, Christine Frietchen, Editor-in-Chief, 212-204-1752; cfrietchen@about.com. Also, Meredith Worsham, 249 W. 17th St., New York, NY 10011; 212-204-2617; mworsham@about.com; www.about.com.

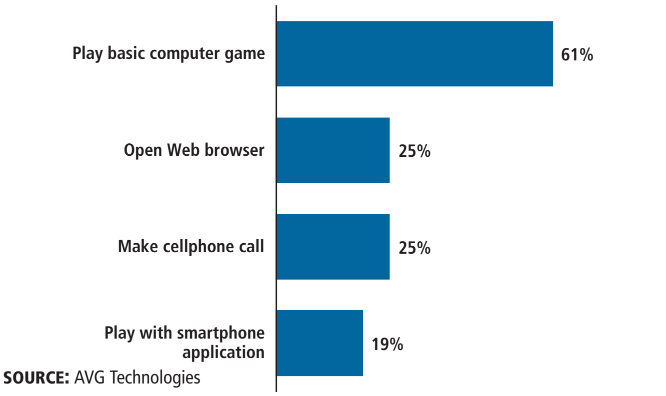
Harris Interactive, Alyssa Hall, Project Supervisor, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

Kids Accomplish Tech Benchmarks At An Early Age

Kids aged 2-5 are more likely to be able to play with a smartphone application than to be able to tie their shoelaces (19% vs. 9%), according to AVG Technologies.

Those aged 4-5 are, unsurprisingly, able to accomplish more tasks than those 2-3, but it's relatively close. For instance, 17% of 2-3-year-olds can play with a smartphone application compared to 21% of 4-5-year-olds.

TASKS THAT 2-5-YEAR-OLDS ARE ABLE TO ACCOMPLISH ON THEIR OWN



SOURCE: AVG Technologies

There is little difference between the sexes when it comes to technology usage. Some 59% of girls and 58% of boys can play a computer game; 28% and 29%, respectively, can make a cellphone call.

SOURCE: AVG Technologies, Siobhan MacDermott, Policy Officer, Glenholm Park, Brunel Dr., Newark, Nottinghamshire, UK NG24 2EG; 415-299-2945; siobhan.macdermott@avg.com; www.avg.com.

TV, Computers Most Used CE Devices By 4-14-Year-Olds

TVs are the most widely used consumer electronic device among 4-14-year-olds, according to NPD Group. Computers — both desktop and laptop — are the second most used device. Notably, children in this age group are altering what they do on computers: their visits to social networking sites are up, but they are playing fewer CD-ROM games and are streaming less music.

Three in 10 households with kids aged 4-14 (30%) purchased a cellphone in the past year, making it the most acquired consumer electronics device. In terms of future intent, these homes are equally as likely to purchase HDTVs and digital cameras as they are cellphones.

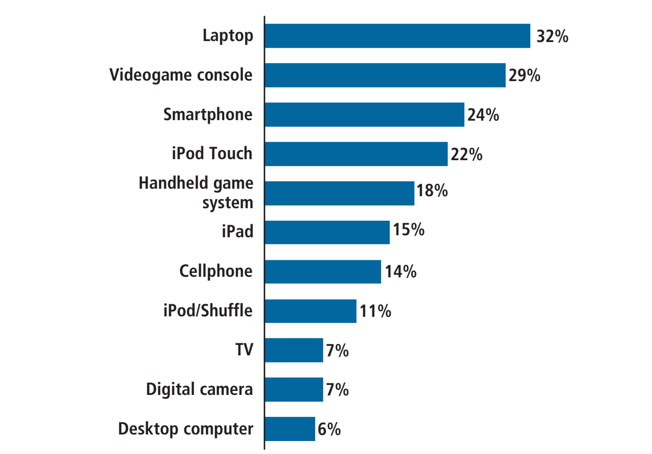
Those aged 4-14 are interested in portability. Four of the five top devices owned by this age group allow them to access entertainment on-the-go: portable videogame systems, portable digital music players, digital cameras, and cellphones. Console videogame systems are the only exception.

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.

6-14-Year-Olds Desire Mobile Tech Devices

Laptops are the most desired technology product desired by 6-14-year-olds, according to PlayScience Lab. With the

6-14-YEAR-OLDS' MOST DESIRED TECHNOLOGY



SOURCE: PlayScience Lab

exception of a videogame console, five of the top six technologies on their wish lists are mobile devices.

Kids, unsurprisingly, evolve their must-have products as they age. This is partly due to the fact they might already own items, but also because they become more interested in multi-faceted devices rather than a device that allows them to play games.

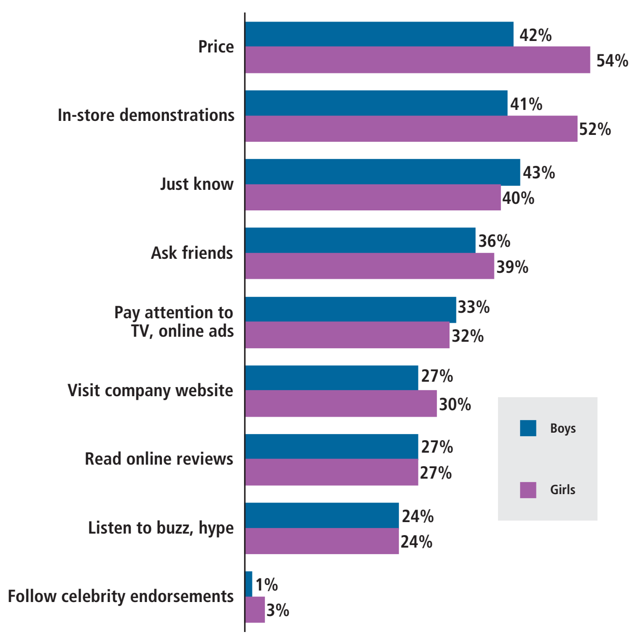
For instance, 6-7-year-olds are more than twice as likely as those age 12-14 to want a handheld game system (26% vs. 10%). Conversely, 12-14-year-olds are more likely than 6-7-year-olds to want a netbook (9% vs. 3%) or iPad (26% vs. 14%). Interestingly, the desire to own an iPad drops to 7% for 8-9-year-olds before rising to 14% for 10-11-year-olds.

SOURCE: PlayScience Labs, Shari Munoz, Director Research, PO Box 2318, Marion, NC 28752; 646-808-5333; info@playsciencelab.com; www.playsciencelab.com.

Price Is Top Factor In Picking Favorite Electronics Brands, Say 8-18-Year-Olds

Both boys and girls 8-18 say price determines their preferred electronics or computer brands, according to About.com and Harris Interactive. Girls are slightly more likely than boys to also be swayed by seeing the product in store or by asking their friend's opinions.

HOW BOYS, GIRLS AGED 8-18 DETERMINE THEIR FAVORITE ELECTRONICS, COMPUTER BRANDS



SOURCES: About.com, Harris Interactive

SOURCES: About.com, ConsumerSearch Survey, Christine Frietchen, Editor-in-Chief, 212-204-1752; cfrietchen@about.com. Also, Meredith Worsham, 249 W. 17th St., New York, NY 10011; 212-204-2617; mworsham@about.com; www.about.com. Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

Children Want Computers To Be More Human

Children's vision for the computers of the future centers on greater interactivity, more intuitive interfaces, and a more "real" presence in the physical world, according to a global study of children age 12 and younger by research firm Latitude. When asked to draw pictures of what they'd like their computers and/or the Internet to do differently than they do now, more than three quarters drew images of computers interacting with human beings directly, through touch or voice commands.

Children in Europe, the U.S., and Australia are more interested in the process of interacting with computers — such as talking to or playing games with them — than in using them for tasks. Children in Africa and South Asia, on the other hand, want computers to provide practical assistance such as help with homework, or creative tools that help them make more realistic drawings or create movies.

Kids in Africa, South Asia, and Latin America are more likely than their counterparts in Europe, North America, and Australia to envision more personable, human-like computers or robots. Almost three quarters (74%) of kids in Africa and South Asia would like technology that would help them learn new skills or perform tasks such as cleaning their rooms.

SOURCE: "Children's Future Requests for Computers & The Internet," Latitude, Ian Schulte, Director of Business & Tech Development, 275 Cabot St., Beverly, MA 01915; 978-921-0712; ischulte@latd.com; www.latd.com.

College Students Say Tablets Help Them Study

Seven in 10 college students and college-bound high school seniors are interested in owning tablets, according to the Pearson Foundation. Only 7% of college students and 4% of high school seniors currently own tablets, but 20% of college students and 7% of high school seniors plan to purchase one in the next six months.

Among those who own tablets, 86% feel that their tablets help them study more efficiently, and 76% think their tablets help them perform better in their classes.

More than eight in 10 tablet owners (86%) think professors should integrate tablet-based activities into their courses, even though only two in 10 say some of their professors currently use tablets.

Students prefer digital formats over print for reading textbooks (55% of both college students and high school seniors), course-related materials such as journals (62% of college students and 49% of high school seniors), and leisure books (55% of college students and 59% of high school seniors). More than seven in 10 tablet owners (73%) prefer reading textbooks in digital formats.

SOURCE: "Pearson Foundation Survey on Students and Tablets," Pearson Foundation, Susan Aspey, 1330 Ave. of the Americas, New York, NY 10019; 800-745-8489; susan.aspey@pearson.com; www.pearsonfoundation.org. Price: Contact for information.

factoids

- The average U.S. household spent $1,179 on **consumer electronics** products between January 2010 and January 2011. *(Consumer Electronics Association; phone: 703-907-7600)*
- Almost a fifth of U.S. adults (19%) plan to buy **e-Readers** in the next six months. *(Affinity Research; phone: 212-922-9582)*
- Eight in 10 **tablet owners** (82%) use the devices primarily at home. *(AdMob; phone: 650-931-3940)*
- More than two thirds of **tablet owners** (68%) use their devices for at least one hour per day. *(AdMob; phone: 650-931-3940)*
- Three quarters of **tablet** users (77%) say their laptop or desktop computer usage increased after buying a tablet. *(AdMob; phone: 650-931-3940)*
- Almost half (46%) of U.S. households own **MP3 players**; 63% of these own iPods. *(Nielsen; phone: 646-654-5000)*
- More than a quarter (26%) of the **mobile apps** smartphone and tablet users downloaded in 2010 were only opened once. *(Localytics; phone: 617-418-4422)*
- Two thirds of Americans (66%) buy **accessories** for their electronic devices at a physical store location. *(Consumer Electronics Association; phone: 703-907-7080)*
- Three fourths of **iPad owners** (75%) use their device five days a week, including 55% who use it daily. *(Knowledge Networks; phone: 908-497-8040)*
- Of the 17.6 million **computer tablets** shipped worldwide in 2010, 84% were iPads. *(Juniper Research; phone: 408-716-5483)*
- Almost half of workers (47%) who watch **online videos** on their mobile devices at work hide the devices under the table while watching. *(Harris Interactive; phone: 585-272-8400)*
- More than half of consumers (53%) shopping for **consumer electronics** have left a store without purchasing because they couldn't decide what to buy. *(Retrevo; phone: 855-738-7386)*

demographics

The U.S. population is undergoing a number of shifts — in racial/ethnic composition, family and household structure, and age — all of which affect how marketers allocate resources and shape communications. In addition, nearly a third of U.S. households consist of one person living alone; 45% of all households are headed by unmarried adults.

Among households headed by unmarried opposite-sex partners, nearly four in 10 include the biological children of at least one partner. At the same time, the population is aging; children now make up less than a quarter of the total population — the smallest percentage since the Census Bureau began tracking.

The majority of U.S. population growth is coming from its Hispanic residents, whose population grew more than eight times as much as that of non-Hispanics between 2000 and 2010. Looking forward, the rate of growth for this group is likely to slow as borders have been tightened, immigration has slowed, and the Hispanic birth rate appears to be declining.

The younger the demographic, the more racially and ethnically diverse it is. Just over half of U.S. children under 12 are non-Hispanic White, compared to nearly eight in 10 people age 55 and older. Nearly a quarter of U.S. children are Hispanic. One in four children under 18 have immigrant parents, and one in eight U.S. residents were born outside the U.S.

Immigrants from Latin America and Asia account for eight in 10 foreign-born U.S. residents. Three in 10 foreign-born Americans are from Mexico alone, and more people of Puerto Rican origin live in the U.S. than in Puerto Rico itself. It may be impossible to overstate the importance of Hispanics in the U.S. population of the near future — and of the present. Many marketers have an incomplete understanding of Hispanic American identity, culture, and language use. Language use in particular is often viewed in binary terms — Spanish-dominant or English dominant. The reality is that among multilingual Americans, language preference often shifts from moment to moment according to context, company, and the content of the conversation.

Boomers And Gen Xers Have Youthful Attitudes

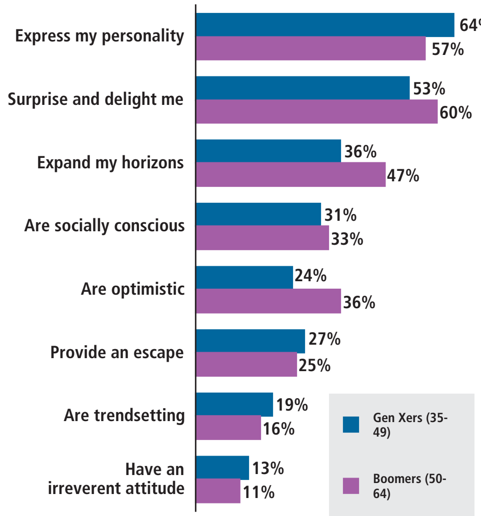
Youth may be more a state of mind than a demographic, according to The Geppetto Group. Attitudes traditionally associated with teens and young adults in their 20s play significant roles in Boomers' and Gen Xers' brand choices.

Six in 10 adults ages 35-64 favor brands that help them express their personalities, and more than half like brands that surprise them.

Boomers are more drawn than Xers are to brands that surprise them, broaden their horizons, or express an optimistic point of view. Gen Xers are more likely than Boomers to seek out brands that express their personalities.

Women are more likely than men to be drawn to brands that surprise them or serve as a means of self-expression, while men are more likely than women to see the appeal of an irreverent attitude or the opportunity to broaden their horizons.

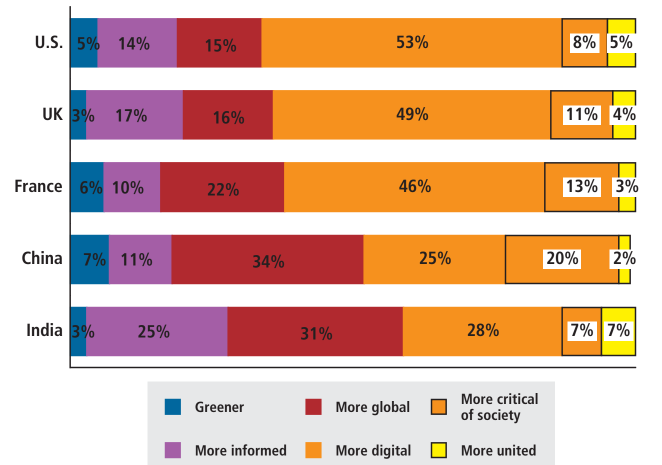
YOUTH-ORIENTED CHARACTERISTICS THAT INFLUENCE BOOMERS' AND GEN XERS' CHOICES OF BRANDS



SOURCE: The Geppetto Group

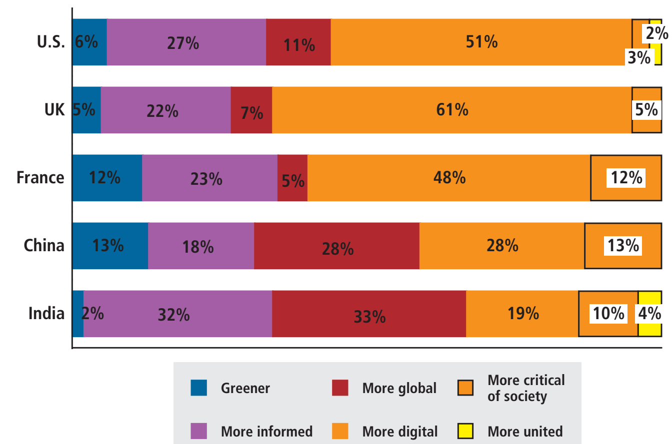
SOURCE: "Geppetto's Youthink: Driving Brand Appeal Via Mindset Over Demographics, April 2011," G-Nome, division of The Geppetto Group, Rachel Geller, Chief Strategic Officer, 114 Fifth Ave., 4th Fl., New York, NY 10011; 212-462-8142; rgeller@geppettogroup.com; www.geppettogroup.com. Price: Contact for information.

BIGGEST DIFFERENCE BETWEEN THOSE AGED 18-25 AND 40-55, ACCORDING TO TODAY'S YOUTH, BY COUNTRY



SOURCE: Euro RSCG

BIGGEST DIFFERENCE BETWEEN THOSE AGED 18-25 AND 40-55, ACCORDING TO 40-55-YEAR-OLDS, BY COUNTRY



SOURCE: Euro RSCG

Just Call Millennials The Digital Generation

Millennials cite the digital divide as the top issue that separates them from previous generations over being green, informed, or global, according to Euro RSCG's survey of those living in China, France, the UK, India, and the U.S. The older generations concur that the digital divide is the biggest difference between the generations.

U.S. millennials are slightly more idealistic than those age 40-55 in believing the world needs to be changed (92% vs. 83%) and that today's youth has a duty to change the world (83% vs. 57%). It's a good thing Millennials want to take a stand since the older generation feels today's youth has more power to change the world than they did (65% vs. 53%).

Change is most likely to come from social media users (44%), say millennials, followed by the products they consume (23%), corporations (20%), and politics (13%). U.S. millennials are less likely than those in the UK, China, France, and India to have faith in politics effecting change.

While U.S. millennials feel social media is about entertainment (79%), they are nearly equally as likely to claim social media is about current affairs and forcing

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.

Singles Head 45% Of Households

More than four in 10 U.S. residents ages 18 and older (44%) were unmarried as of 2010 — a total of 99.6 million, according to the U.S. Census Bureau. Men make up 55% of unmarried adults 18 and older. Some 17% of unmarried adults are ages 65 and older.

The 59.1 million households headed by unmarried people represent 45% of all U.S. households. Nearly three in 10 households (27%) consist of a single person living alone, up from 17% in 1970.

Among households headed by unmarried opposite-sex partners, 38% include at least one biological child (of either partner). Almost 12 million single parents live with their children, including 9.9 million mothers and 1.8 million fathers.

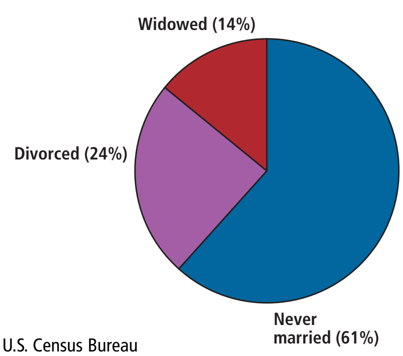
Of the 6.5 million households headed by unmarried partners in 2009, 581,300 (0.9%) were same-sex partner households [calculations by Research Alert].

More than a third of women ages 15-50 (35%) who gave birth in 2008 were unmarried (including never-married, divorced, or widowed) at the time, according to 2009 data (the latest available).

More than eight in 10 unmarried people ages 25 and older (85%) had high school diplomas or more education as of 2010; 25% had bachelor's degrees or higher.

Unmarried adults made up 38% of registered voters who participated in the 2008 presidential election.

UNMARRIED ADULTS IN THE U.S., 2010



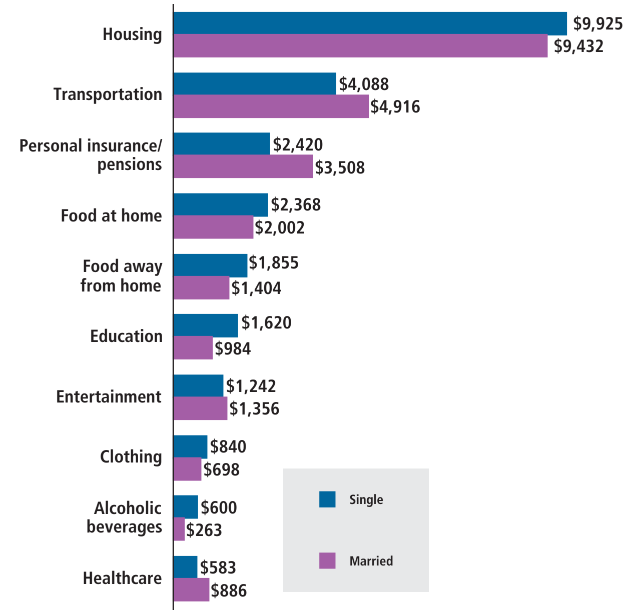
SOURCE: U.S. Census Bureau

SOURCE: "Single Life," August 2011, U.S. Census Bureau, Public Information Office, 4600 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

Married People Spend Less Than Singles

Per capita spending is similar among single and married adults in their early 20s, but by the late 20s, singles spend more, according to the Bureau of Labor Statistics. Married 21-26-year-olds earn more than singles, but by 27-29 the gap closes. Some differences in spending are due to economies of scale, but others are affected by lifestyle.

PER CAPITA SPENDING BY SINGLE AND MARRIED ADULTS AGES 21-29, BY CATEGORY, 2009



SOURCE: Bureau of Labor Statistics

SOURCE: "Focus on Prices and Spending: Consumer Expenditures: 2009," May 2011, U.S. Bureau of Labor Statistics, William Hawk, Economist, 2 Massachusetts Ave., NE, #2850, Washington, DC 20212; 202-691-5131; hawk.william@bls.gov; www.bls.gov

Utah Is U.S. State With Most Kids

Children comprise more than 20% of the total populations of Utah, Texas, Idaho, Arizona, and Georgia, according to the U.S. Census Bureau. Unsurprisingly, the states with the largest overall populations — California, Texas, Florida, and New York — have the largest numbers of children.

U.S. STATES WITH THE MOST CHILDREN UNDER 14 PER CAPITA

Utah	25.2%
Texas	22.1%
Idaho	21.3%
Arizona	20.8%
Georgia	20.6%
Alaska	20.4%
Nevada	20.3%
Mississippi	20.2%
New Mexico	19.9%
California	19.8%

SOURCE: U.S. Census Bureau

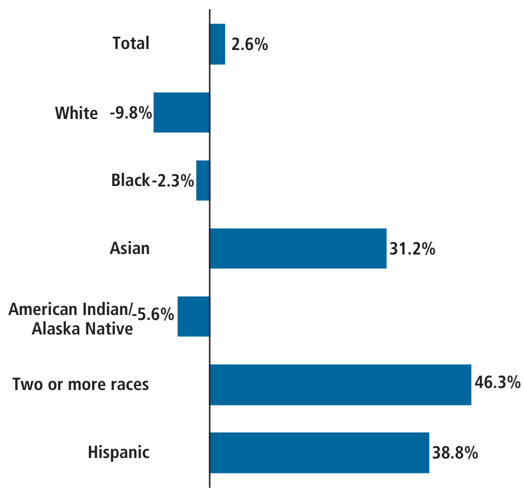
SOURCE: U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov.

Percentage Of Children In U.S. Reaches A New Low

Children under age 18 make up 24% of the total U.S. population; those under age 15 make up 20%, the lowest percentages since the U.S. Census began tracking the data, according to the Population Reference Bureau. These proportions are expected to drop even further to 23% by 2050. There are 74.2 million children living in the U.S; 54% are non-Hispanic white, 23% are Hispanic, 14% are Black, and 4% are Asian. Children of immigrants comprise one in four children under age 18.

Michigan, Rhode Island, Vermont, and Washington, D.C. experienced the largest declines in numbers of children, while Arizona, Florida, Georgia, Nevada, and Texas saw the largest increases.

CHANGES IN POPULATION OF U.S. CHILDREN UNDER AGE 18, 2000-2010, BY RACE/ETHNICITY



SOURCE: Population Reference Bureau

SOURCE: Population Reference Bureau, Mark Mather, Associate Vice President, 1875 Connecticut Ave., NW, #520, Washington DC 20009; 800-877-9881; popref@prb.org; www.prb.org.

Black Buying Power Tops $1 Trillion

People of African descent make up the majority of Black Americans, but the population also includes people of West Indian, Asian, and Latin American descent, according to Nielsen. There are currently more than 42 million Blacks in the U.S., and they are expected to wield $1.1 trillion in buying power by 2015.

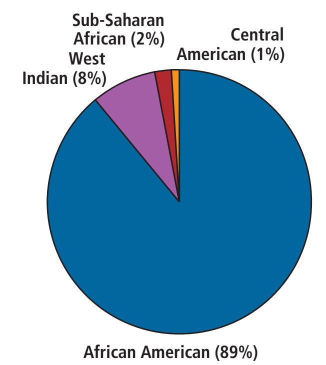
The number of Black households with annual incomes of $75,000 or more grew 64% between 2000 and 2009, according to Census data cited.

The Black population is younger than the national average; 47% are under age 35.

The “digital divide” between Whites and Blacks has largely disappeared; Blacks are more likely than others to visit Twitter, download movies, and take classes online, finds Nielsen. They’re more likely than average to make online purchases of beer, wine, or liquor (17% more likely); baby clothes or shoes (12%); and women’s clothes or shoes (5%).

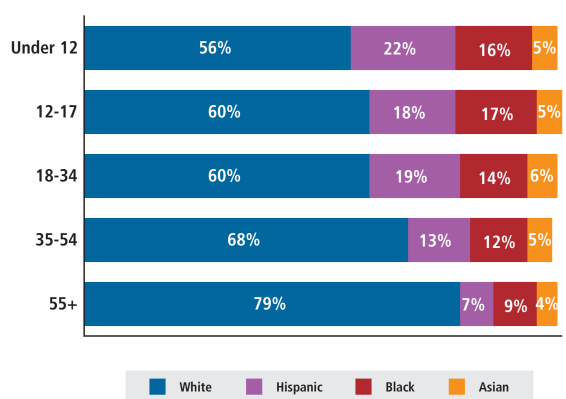
One third of Black Americans own smartphones; more than half of those under age 35 own them. More than four in 10 Blacks (44%) who bought new mobile phones in the first quarter of 2011 bought smartphones, compared to 36% of overall mobile phone buyers who did so.

BLACK AMERICANS, BY COUNTRY OF ORIGIN



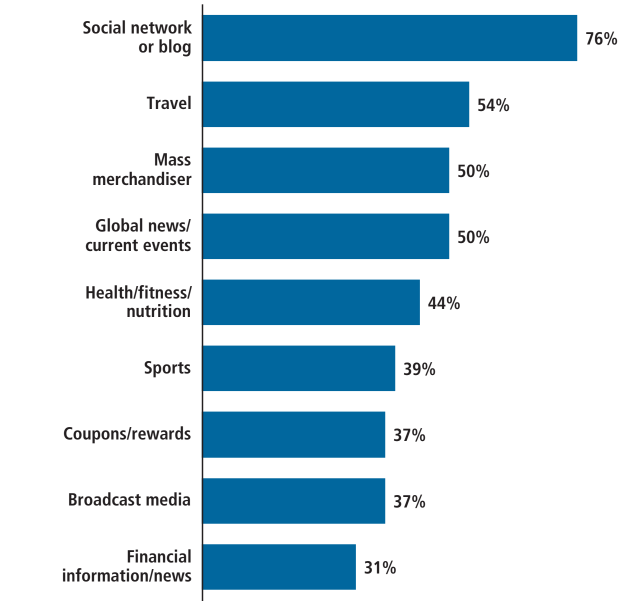
SOURCE: Nielsen

U.S. POPULATION BY AGE AND RACE/ETHNICITY



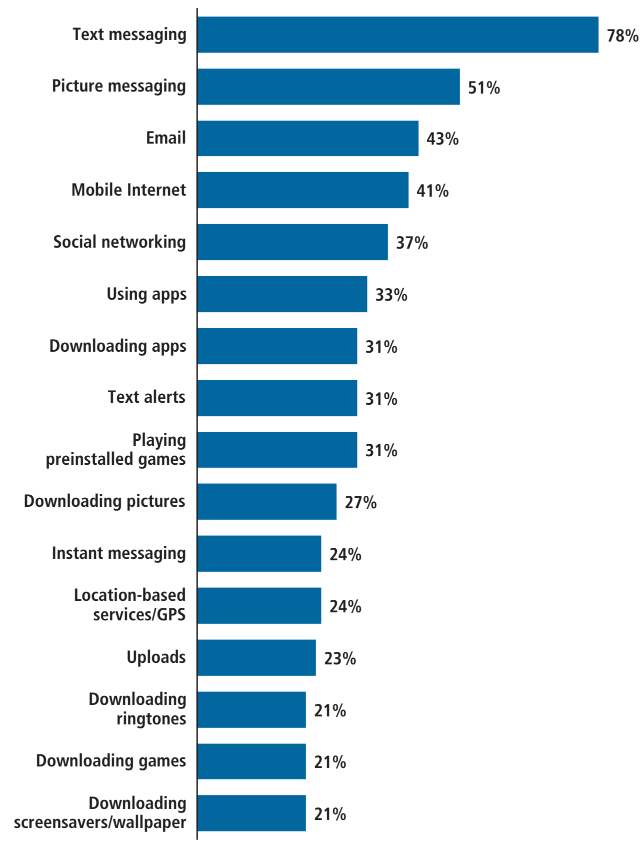
SOURCES: U.S. Census Bureau, Nielsen

WEBSITES VISITED BY BLACK INTERNET USERS, JULY 2011



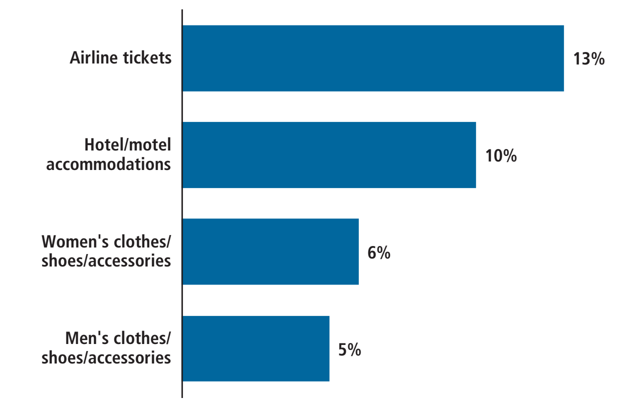
SOURCE: Nielsen

HOW BLACK AMERICANS USE THEIR MOBILE PHONES
(% who did each activity during the first quarter of 2011)



SOURCE: Nielsen

ITEMS PURCHASED ONLINE BY BLACK AMERICANS IN PAST SIX MONTHS



SOURCE: Nielsen

Whether their mobile phones are smart- or traditional, Blacks spend more than twice as much time talking on them as Whites do: 1,298 minutes vs. 606 minutes per month.

SOURCE: "State of the African American Consumer," September 2011, Nielsen, Susan Whiting, Vice Chair, 770 Broadway, New York NY 10003; 646-654-5000; also; Rebecca Roussell, Director of Public Affairs Communications; 312-385-6507; rebecca.roussell@nielsen.com; www.nielsen.com. Price: Available online at no charge.

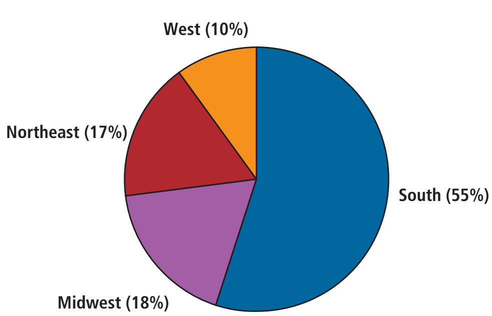
Majority Of U.S. Blacks Live In The South

More than half of Black Americans live in the South, according to the U.S. Census Bureau. Single-race Blacks are more geographically concentrated than mixed-race Blacks, and they're more likely to live in the South (57% vs. 36%).

Mixed-race Blacks are more than twice as likely as single-race Blacks to live in the West (23% vs. 9%).

Single- or mixed-race Blacks comprised more than a quarter of the population in Mississippi (38%), Louisiana (33%), Georgia (32%), Maryland (31%), South Carolina (29%), and Alabama (27%). They made up 52% of the population in the District of Columbia.

GEOGRAPHIC DISTRIBUTION OF BLACK POPULATION IN U.S., 2010



NOTE: Includes those who identify themselves as Black alone or in combination with other races.

SOURCE: U.S. Census Bureau

Mixed-race Blacks are twice as likely as single-race Blacks to live in California (12% of all mixed-race Blacks live there, compared to 6% of single-race Blacks).

STATES WITH LARGEST BLACK POPULATIONS, 2010
(In millions)

New York	3.3
Florida	3.2
Texas	3.2
Georgia	3.1
California	2.7
North Carolina	2.2
Illinois	2.0
Maryland	1.8
Virginia	1.7
Ohio	1.5

NOTE: Includes those who identify themselves as Black alone or in combination with other races.

SOURCE: U.S. Census Bureau

SOURCE: "The Black Population: 2010," September 2011, U.S. Census Bureau, 4600 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

Hispanic, Asian Populations Growing Fastest

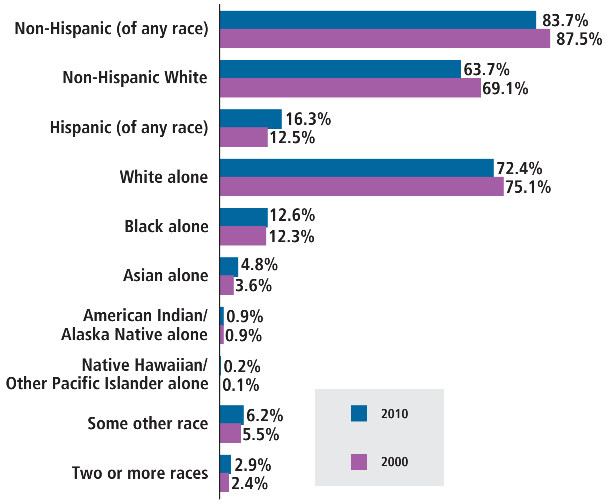
Growth in the Hispanic population accounted for more than half (56%) of the total population growth in the U.S. between 2000 and 2010, according to the U.S. Census Bureau. The Hispanic population grew 43% during this time, from 35.3 million to 50.5 million, while the non-Hispanic population grew 5%. [Note: Hispanics may be of any race.]

The number of people identifying their race as Asian alone grew 44% during this time, from 10.2 million to 14.7 million (calculations by Research Alert). The number of people identifying themselves as Black alone grew 12%, from 34.7 million to 38.9 million. The population of people identifying their race as American Indian or Alaska Native alone grew 16%, from 2.5 million to 2.9 million (calculations by Research Alert). The number of people identifying themselves as being of two or more races grew 32%.

Native Hawaiian and Other Pacific Islanders (56%) and American Indian/Alaska Natives (44%) were most likely to identify themselves as belonging to more than one race. The majority of those who classified themselves as belonging to more than one race were biracial. The most common multiple-race combinations were White and Black (20% of all multiracial Americans), White and "some other race" (19%), White and Asian (18%), and White and American Indian/Alaska Native (16%). People belonging to three or more races made up 8% of the multiracial population. Only 6% of Hispanics identified themselves as being from two or more races.

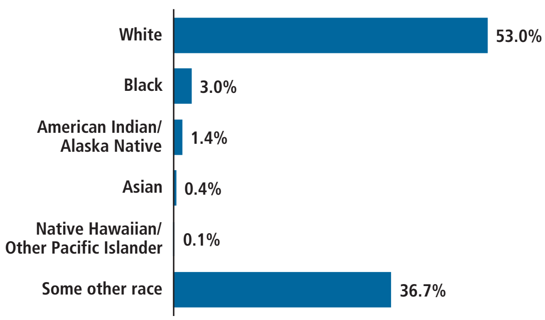
Although the Census 2010 instructions explained that Hispanic origin would be treated separately from race, many His-

U.S. POPULATION BY RACE AND ETHNICITY, 2010 VS. 2000



SOURCE: U.S. Census Bureau

U.S. HISPANIC POPULATION BY RACE, 2010*



*Hispanics who identified themselves as being from only one race.

SOURCE: U.S. Census Bureau

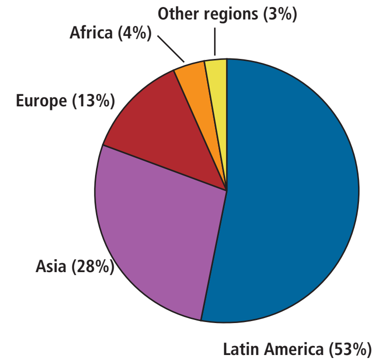
panics indicated their countries of origin or identified as "Latino" when answering the question on race. These responses were classified as "some other race." Nearly all (97%) people in the "some other race" category are Hispanic.

SOURCE: "Overview of Race and Hispanic Origin: 2010," March 2011, Pub. No. C2010BR-02, U.S. Census Bureau, Public Information Office, 4600 Silver Hill Rd., Washington DC 20233; 301-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

Majority Of Foreign-Born From Latin America

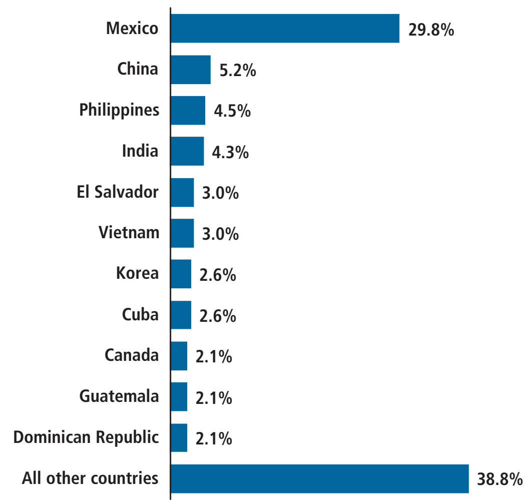
One in eight U.S. residents (12.5%) were born outside of the U.S. as of 2009 (the most recent data available), according to the U.S. Census. The number of foreign-born U.S. residents grew 24% between 2000 and 2009, to 38.5 million. More than eight in 10 (81%) came from Latin America and Asia. Just over one in 10 (13%) came from Europe, representing a dramatic shift from 1960, when 75% of foreign-born residents came from Europe.

REGION OF ORIGIN FOR FOREIGN-BORN U.S. RESIDENTS



SOURCE: U.S. Census Bureau, American Community Survey, 2009

COUNTRY OF ORIGIN OF FOREIGN-BORN U.S. RESIDENTS
(as % of total foreign-born population)



SOURCE: U.S. Census Bureau, American Community Survey, 2009

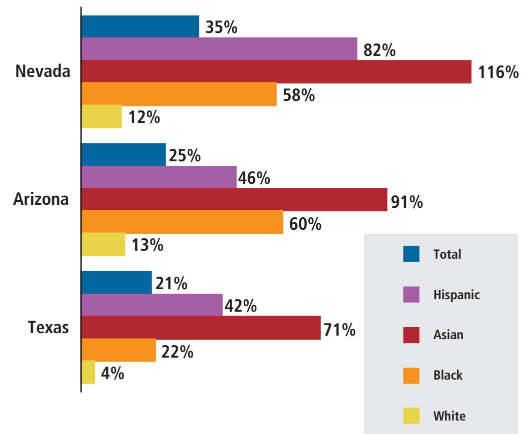
Mexico is by the far the largest single country contributing to the U.S. population; 29.8% of all foreign-born U.S. residents were born in Mexico.

SOURCE: "Place of Birth of the Foreign-Born Population: 2009," American Community Survey Brief, October 2010, U.S. Census Bureau, Elizabeth Grieco, Co-author, 4600 Silver Hill Rd., Washington, DC 20233; 301-763-2422; director@census.gov; www.census.gov/population/www/socdemo/foreign/ Price: This report is available online at no charge.

Hispanic Population Larger Than Projections

In most of the 33 states for which Census 2010 data has been released, Hispanic population numbers are higher than the projected estimates, according to an analysis of Census data by the Pew Hispanic Center. Between full Census counts, the Census Bureau calculates annual estimates of population data based on birth and death certificates, immi-

POPULATION GROWTH IN HIGH-GROWTH STATES, 2000-2010, BY RACE/ETHNICITY



SOURCES: U.S. Census Bureau, Horowitz Associates

gration data, and similar records. So far, Hispanic population totals from the 2010 Census have been running an average of 1.5% higher than these estimates.

U.S. Hispanics are playing a major role in the overall growth of the U.S. population, accounting for 58% of total population growth between 2000 and 2010 (in the states for which 2010 Census data is available).

In six of the states for which 2010 data have been released — Arizona, California, Colorado, Illinois, New Jersey, and Texas — Hispanics have historically made up significant proportions of the population. In these states alone there are 30 million Hispanics, who comprise 31% of the states' overall population. In the remaining 27 states counted thus far, Hispanics make up 7% of the population (a total of 8.7 million).

States with the largest gaps between estimates and counts include Alabama (15.9% higher than estimate), Louisiana (13.2%), and Kansas (10.8%).

Texas, Nevada, and Arizona have seen the highest growth in combined numbers of Hispanic, Asian, and Black Americans between 2000 and 2010, according to a separate analysis of Census 2010 data by Horowitz Associates presented at the Multicultural Media Forum. Black, Hispanic, and Asian Americans make up 55% of the total population of Texas (up from 48% in 2000), 46% of the population of Nevada (up from 35%, and 42% of the population of Arizona (up from 36%). Hispanic populations in Alabama, Arkansas, North Carolina, Maryland, Mississippi, and South Dakota grew more than 100% during this time.

In states with the highest rates of overall population growth, Black, Hispanic, and Asian American populations are driving most of this growth.

SOURCES: "How Many Hispanics? Comparing New Census Counts With the Latest Census Estimates," Pew Hispanic Center, Pew Research Center, Jeffrey Passel, Senior Demographer, 1615 L St., NW, #700, Washington, DC 20036; 202-419-3600; info@pewhispanic.org; www.pewhispanic.org

Horowitz Associates, Adriana Waterston, VP Marketing and Business Development, 1971 Palmer Ave., Larchmont, NY 10538; 914-834-5999; adrianaw@horowitzassociates.com; www.horowitzassociates.com

U.S. Census Bureau, Public Information Office, 4600 Silver Hill Rd., Washington, DC 20233; 301-763-4636; pio.2010@census.gov; www.census.gov

Acculturation, Language Are Complex Issues

Traditional ways of segmenting the U.S. Hispanic consumer market are falling short of the reality of Hispanic Americans' lives, according to Communispace. Acculturation is no longer a one-way journey from new immigrant to assimilated American, especially for Latinos. Not only do first-generation immigrants want to preserve their cultural traditions and pass them on to their children, but Hispanics born in the U.S. view themselves as belonging to two cultures — American and country of origin.

Language is often viewed as a marker of acculturation, but it's not as simple as Spanish-dominant means less acculturated and English-dominant means more acculturated. In a study examining language preference and self-image as Latino vs. American, those who preferred to take the survey in English were more likely to identify themselves as either equally Latino and American or primarily Latino than as primarily American.

Moreover, 61% of respondents chose to take the survey in English, including more than a quarter of those who regularly read online content in Spanish.

Language Use Is Situational

Among Hispanics who speak both English and Spanish, language use is fluid — partly it depends on the situation (such as work or home, formal or informal), but even within a single context, there is a tendency to switch languages depending on what's being discussed. For example, coworkers may be speaking English while discussing work, but switch to Spanish while talking socially.

When asked to name the situations where they feel most strongly connected to Latino culture, Hispanics cite family, moral values, language, cooking/eating, religion, music, socializing, and who lives in the household as the situations and experiences that make them feel most connected.

Entertainment, media, clothing, humor, shopping, and politics are least meaningful for Hispanics' cultural heritage.

SOURCE: "¿Me Entiendes? Revisiting Acculturation," Communispace, Manila Austin, Ph.D., VP Research, Arsenal on the Charles, 100 Talcott Ave., Watertown, MA 02472; 617-607-1400; communispace@communispace.com; www.communispace.com. Price: Available online at no charge.

U.S. Has More Puerto Ricans Than Puerto Rico

More Hispanics of Puerto Rican origin live in the U.S. (50 states plus District of Columbia) than in Puerto Rico (4.4 million vs. 4.0 million), according to the Pew Hispanic Center. Hispanics of Puerto Rican origin are the second-largest country of origin group, comprising 9% of U.S Hispanics. (Hispanics of Mexican origin are the largest group, accounting for 66% of all Hispanics in the U.S.)

Two thirds of Puerto Rican Hispanics in the U.S. (2.9 million) were born in the 50 states or District of Columbia, although those born in Puerto Rico also have U.S. citizenship.

Eight in 10 Puerto Rican Hispanics (81%) living in the U.S. are proficient English speakers, compared with 63% of U.S. Hispanics overall. More than half (54%) of Puerto Ricans living in the U.S. live in the Northeast, including 24% who live in New York. Three in 10 (30%) live in the South.

Puerto Rican Hispanics are more highly educated than Hispanics overall; 73% have high school diplomas or more education, compared with 61% of Hispanics overall. Median income for Puerto Rican Hispanics in the U.S. is $25,000, compared with $20,000 for all U.S. Hispanics.

SOURCE: "Hispanics of Puerto Rican Origin in the United States, 2009," May 26, 2011, Pew Hispanic Center, Daniel Dockterman, Research Assistant, 1615 L St., NW, #700, Washington, DC 20036; 202-419-3600; info@pewhispanic.org; www.pewhispanic.org. Price: Availabile online at no charge.

Mexican Americans Are Driving Growth In U.S.-Born Hispanic Population

The majority of growth among the U.S. Hispanic population is now coming from births rather than immigration, reports the Pew Hispanic Center. This is being driven by Mexican Americans, the largest country-of-origin group among U.S. Hispanics. The 31.8 million Mexican Americans comprised 63% of the total U.S. Hispanic population, in 2010, according to Census data cited. Between 2000 and 2010, the Mexican American population in the U.S. grew by 11.4 million; new births accounted for 63% of the increase.

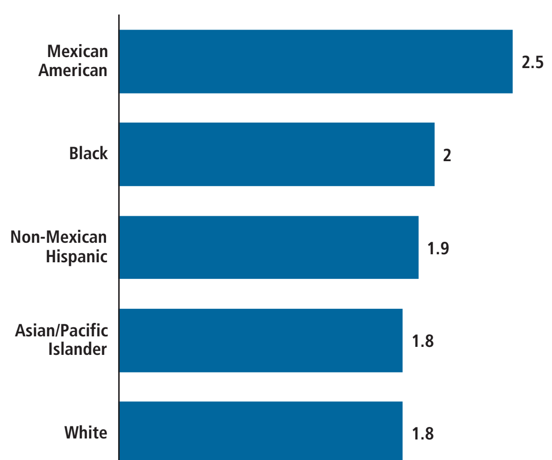
The U.S. Hispanic population overall grew from 35.3 million in 2000 to 50.5 million in 2010; 58% of this increase was due to births rather than immigration. Among several other major country-of-origin groups, however, births accounted for less than half of growth: 39% of growth among Hispanics from Central or South America and 38% of growth among those from Cuba.

Several demographic factors affect the Mexican American birth rate. They're younger than Hispanics from other regions — a median age of 25, vs. 30 for Hispanics of non-Mexican origin, 32 for Blacks, 35 for Asians, and 41 for Whites. Mexican American women also tend to have larger families than other U.S. Hispanics and non-Hispanics. Mexican Americans comprised 10% of the U.S. population in 2008, but Mexican American mothers gave birth to 16% of all babies born in the U.S. that year.

Mexican American first-generation immigrants have more children than U.S.-born women of Mexican descent: an average of 2.7 among immigrants ages 40-44, vs. 2.1 among their native-born counterparts.

SOURCE: "The Mexican American Boom: Births Overtake Immigration," July 14, 2011, Pew Hispanic Center, 1615 L St., NW, #700, Washington, DC 20036; 202-419-3600; info@pewhispanic.org; www.pewhispanic.org. Price: Available online at no charge.

AVERAGE NUMBER OF CHILDREN BORN TO U.S. WOMEN AGES 40-44, BY RACE/ETHNICITY

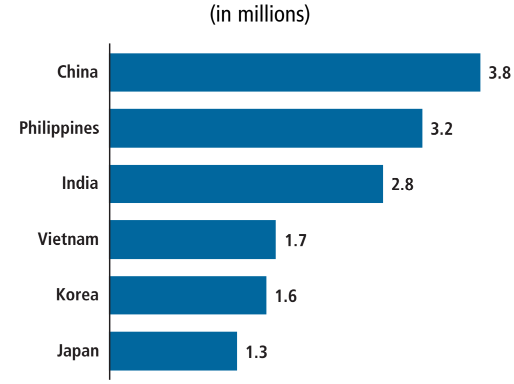


SOURCE: Pew Hispanic Center

Chinese Are Largest U.S. Asian Population

The U.S. population includes 17.3 million people of Asian descent, including 14.7 million who describe their race as Asian alone and another 2.6 million who are Asian in combination with one or more additional races, according to the U.S. Census Bureau's 2010 Census. Asian Americans make up 5.6% of the total U.S. population, but account for much larger shares in certain states. California has the largest number

ASIAN AMERICANS' COUNTRIES OF ORIGIN
(in millions)



SOURCE: U.S. Census Bureau

of Asians (5.6 million), while Asians make up the largest share of residents of Hawaii (39% are Asian alone, and 57% are Asian alone or in combination).

Chinese Americans constitute the largest group of Asians in the U.S., followed by Filipinos. Asian Americans have a median household income of $68,780, but income differs significantly by country of origin.

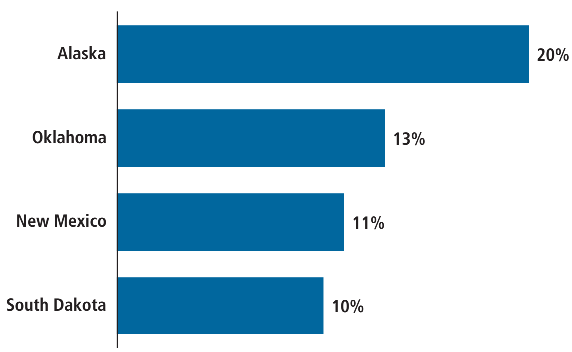
Asian Americans are more likely than overall U.S. adults to have completed college; 50% of single-race Asians age 25 and older hold bachelor's degrees or higher, compared to 28% of all U.S. adults. Two in 10 Asians have graduate or professional degrees — twice the national average.

SOURCE: Census 2010 and American Community Survey 2009, Pub. No. CB11-FF.06, March 2011, U.S. Census Bureau, Public Information Office, 4600 Silver Hill Rd., Washington, DC 20233; 302-763-3030; pio@census.gov; www.census.gov. Price: Available online at no charge.

American Indian Population Growth Outpaces That Of Overall Population

The 5.2 million American Indian and Alaska Natives made up 1.7% of the U.S. population as of 2010, according to the U.S. Census Bureau. Between 2000 and 2010, the American Indian and Alaska Native population grew 26.7%, compared with 9.7% growth in the overall U.S. population. By 2050, the American Indian and Alaska Native population is projected to reach 8.6 million, or 2% of the total population. The median age of this group is 29.0, much younger than the median age of the overall U.S. population: 37.2.

STATES WITH HIGHEST PROPORTIONS OF AMERICAN INDIANS/ALASKA NATIVES
(as % of total population of state)



SOURCE: U.S. Census Bureau

SOURCE: U.S. Census Bureau, Public Information Office, 4600 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov

factoids

- ➤ The U.S. is the only member country in the Organization for Economic Cooperation and Development (OECD) in which the average heights of adult men and women are no **taller** at ages 45-49 than at ages 20-24. (OECD; PHONE: 011-33-1452-49700)
- ➤ More than three quarters of Millennials (77%) say they're delaying **major life events** such as getting married or buying homes due to tough economic times. *(Generation Opportunity; phone: 703-622-6244)*

education

Most high school students plan to go to college, but girls are more likely than boys to say so. Among adults in their mid- to late-20s, women are more likely than men to have bachelor's degrees or more education. Asians are the most highly educated Americans — more than half have at least a bachelor's degree, compared to a third or fewer of those in other racial and ethnic groups.

Prospective college students are more likely to be worried about how they'll finance their educational expenses than they are to be concerned about getting accepted or doing well once they're admitted. More than six in 10 say cost is a very important factor in choosing a college or university. Prospective students visit an average of two or three campuses during their application process, and more than half watch college/university admissions videos on YouTube.

Children and teens have high expectations for their schools when it comes to integrating technology into the curriculum. More than half of high school students say their schools are not doing a good job of using new technology in the classroom; almost three quarters of their teachers say their schools are doing a good job.

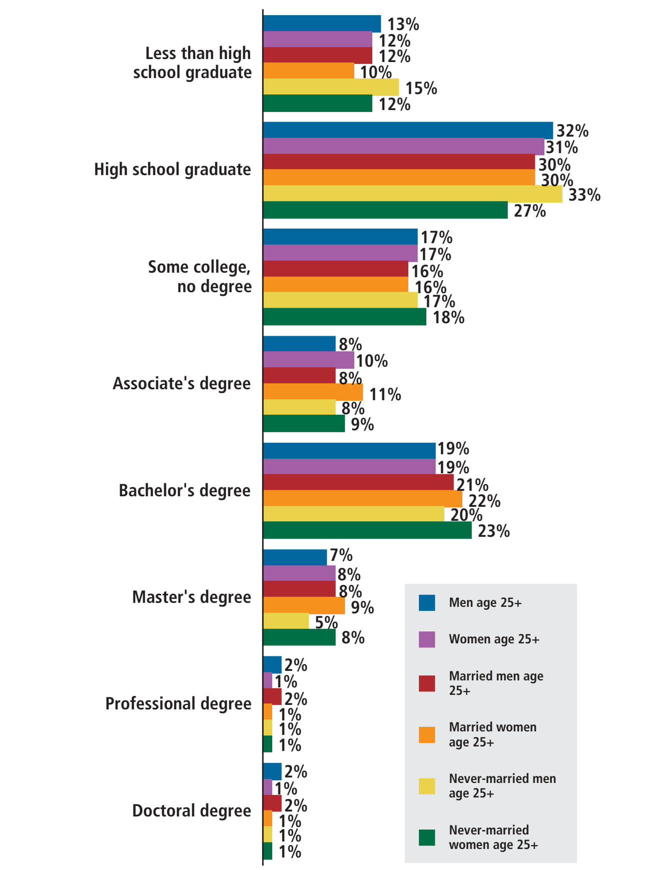
Women In 20s Have More Education Than Men

Three in 10 U.S. adults age 25 and older have bachelor's degrees or more education, according to the U.S. Census Bureau. Among employed adults, 37% of women and 35% of men have bachelor's degrees or advanced degrees. The gender gap is more pronounced among young adults ages 25 to 29 (employed or not): 36% of these women have bachelor's degrees or more education, compared to 28% of men.

Asian Americans are much more likely than members of other racial/ethnic groups to have bachelor's degrees or advanced degrees: 52% of Asian Americans age 25 and older have this level of education, compared to 33% of non-Hispanic Whites, 20% of Blacks, and 14% of Hispanics.

Nearly nine in 10 adults age 25 and older (87%) have at least a high diploma or equivalent, up from 84% in 2000.

EDUCATION LEVELS OF AMERICANS AGE 25+, BY GENDER AND MARITAL STATUS



NOTE: Calculations by Research Alert.

SOURCE: U.S. Census Bureau

SOURCE: "Educational Attainment in the United States: 2010," April 2011, U.S. Census Bureau, Robert Bernstein, Public Information Office; 301-763-3030; pio@census.gov; www.census.gov

Asians Are 73% More Likely Than Adults Overall To Have At Least A Bachelor's Degree

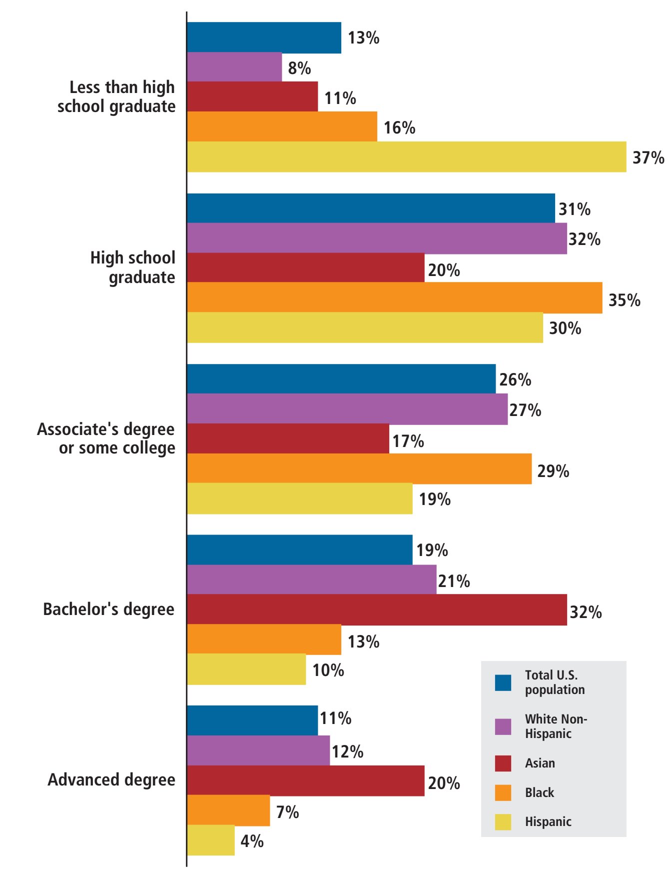
Asian Americans are more highly educated than their White, Black, or Hispanic peers, according to the 2010 Census. More than half of Asians (52%) — alone or in combination with other races — living in the U.S. have bachelor's degrees or more education, compared to 30% of overall U.S. residents, 33% of Non-Hispanic Whites, 20% of Blacks (alone or in combination with other races), and 14% of Hispanics.

Almost nine in 10 Americans (87%) have high school diplomas or more education; 89% of Asians, 92% of Whites, 84% of Blacks, and 63% of Hispanics have at least a high school education.

Black women are more highly educated than Black men, but Asian men have higher levels of education than Asian women. There's little gender difference in education levels of White men and women or Hispanic men and women.

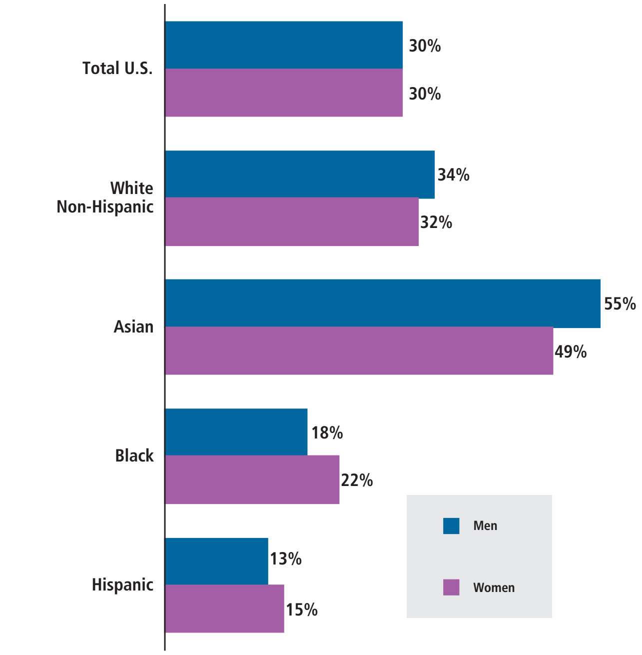
Asian Americans are the most likely group to be employed, although Hispanics are most likely to participate

HIGHEST LEVEL OF EDUCATION COMPLETED AMONG U.S. ADULTS, BY RACE AND ETHNICITY, 2010



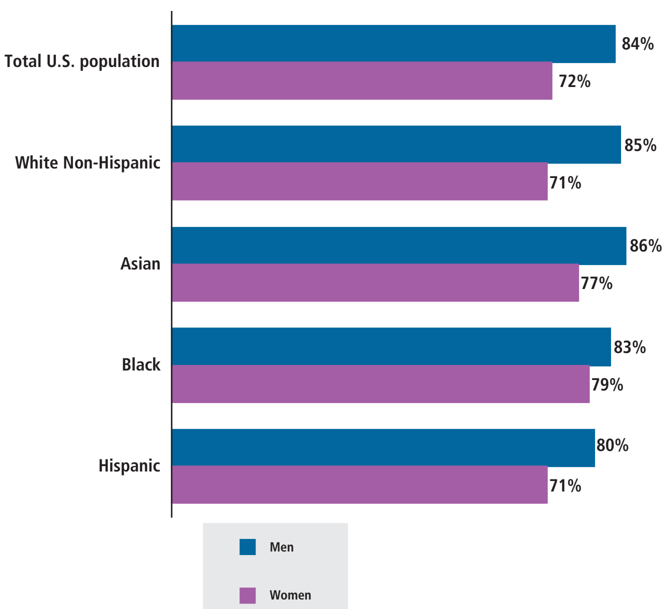
SOURCE: U.S. Census Bureau

U.S. MEN AND WOMEN WHO HOLD BACHELOR'S DEGREES OR HIGHER, BY RACE/ETHNICITY, 2010



SOURCE: U.S. Census Bureau

U.S. MEN AND WOMEN WHO WORK FULL-TIME, BY RACE/ETHNICITY, 2010



SOURCE: U.S. Census Bureau

in the labor force (which includes both those who are employed and those currently unemployed but seeking work). More than nine in 10 Asian adults ages 16 and older (92%) who are part of the civilian labor force are employed.

Asian men (92%) and women (93%) are equally likely to be employed.

Blacks are least likely to participate in the labor force (62%, compared to 65% of overall adults). More than eight in 10 Black adults (83%) who participate in the labor force are employed. Black women (87%) are significantly more likely than Black men (79%) to be working.

More than two thirds of Hispanics (67%) are in the labor force. Of these, 87% are employed: 88% of Hispanic women and 87% of Hispanic men.

Among non-Hispanic Whites, 91% of those participating in the labor force are employed, including 90% of men and 93% of women.

SOURCE: "Current Population Survey: 2010," U.S. Census Bureau, Public Information Office, 4600 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov

Majority Of Students Plan To Go To College

Three quarters of current middle and high school students (76%) plan to earn bachelor's degrees (38%) or graduate/professional degrees (38%), according to MetLife. Another 16% plan to get associate's degrees or technical/trade school certificates.

Female high school students are more likely than their male peers to plan to earn college degrees (83% vs. 72%). The gender gap occurs in the transition from middle school to high school; 73% of middle school girls and 72% of middle school boys plan to earn college degrees.

More than eight in 10 middle and high school students (84%) believe their career opportunities would be severely limited if they didn't complete some post-secondary education. Most students are optimistic about their prospects: 81% think it's very (42%) or somewhat (39%) likely that they'll be able to find jobs in their chosen fields. That proportion has decreased somewhat in the past few years, however. In 1997, 50% of students felt it very likely that they'd be able to find jobs in their chosen fields.

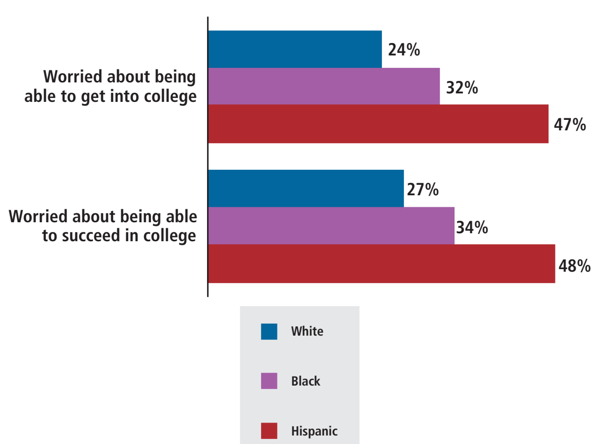
Students tend to be more worried about financing their post-secondary education (57% worry a lot) than about getting into college (31%) or being able to succeed once they're there (33%). Black and Hispanic students are more likely than White students to be worried about getting into and doing well in college.

More than nine in 10 parents of secondary school students (93%), 85% of secondary school teachers, and 84% of middle and high school students consider it either essential or very important for high schools to ensure that graduating seniors are well-prepared for college and/or careers.

More than nine in 10 teachers (99% of English teachers and 92% of math teachers) consider the ability to write clearly and persuasively essential or very important. Fewer than half (45%) of English teachers and 50% of math teachers think high-level math skills such as trigonometry and calculus are essential or very important.

Fortune 1000 executives rate critical thinking (99%), problem solving (99%), and writing skills (97%) as essential or very important for graduating high school seniors.

MIDDLE AND HIGH SCHOOL STUDENTS WHO ARE VERY WORRIED ABOUT COLLEGE ACADEMICS, BY RACE/ETHNICITY



SOURCE: MetLife

SOURCE: "The MetLife Survey of the American Teacher: Preparing Students for College and Careers, Part 1: Clearing the Path, March 2011," Ted Mitchell, 1095 Ave. of the Americas, 40th Fl., New York, NY 10036; 401-827-3236; tjmitchell@metlife.com; www.metlife.com/teachersurvey

Cost Influences College Selection

More than a third of college freshmen (37%) say the current economy "heavily" or "highly" influenced their college choice, according to Maguire Associates and FastWeb. While 82% applied for need-based financial aid, only 56% received it from the schools they're attending; 50% received merit-based aid. Among students who are not attending their first-choice schools, 31% cite cost as the reason.

A third of students (33%) whose first-choice schools were public but who enrolled at private colleges appealed their financial aid packages. Among those students, nearly half (45%) received more aid from their chosen schools as a result. Among students who preferred private colleges but enrolled in public schools, 19% appealed their aid offers, with 32% receiving additional assistance.

REASONS STUDENTS SELECTED THEIR COLLEGE, 2011

Quality of major	45%
Scholarship, financial assistance	43%
Total costs	41%
Academic reputation	38%

SOURCES: FastWeb, Maguire Associates

SOURCES: Fastweb, Mark Kantrowitz, Publisher, 444 N. Michigan Ave., #600, Chicago, IL 60611; 312-832-2345; info@fastweb.com; www.fastweb.com.

Maguire Associates, Tara Scholder, SVP, 5 Concord Farms, 555 Virginia Rd., #201, Concord, MA 01742; 978-371-1775; www.maguireassoc.com.

Family Is Key Influencer To Attend College, Say High School Students

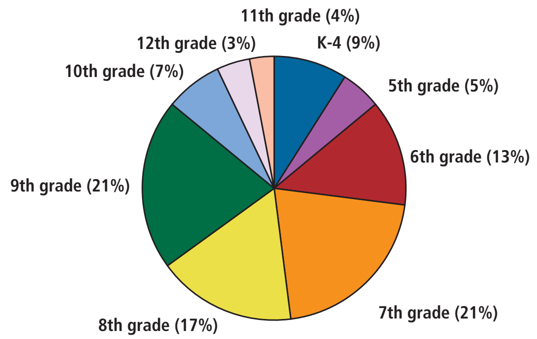
Family members are the ones who possess the most influence in urging high school students to attend college, according to the non-profit What Kids Can Do, the Public Education Foundation in Chattanooga, and the Alliance for Education in Seattle. Three in four students (75%) say their families "influence" them a lot in their college decision; 43% cite a mentor, coach, or community member, 43% say a teacher, and 34% say friends.

Students are most likely to first discuss college during middle school; 13% first spoke of college in 6th grade, 21% in 7th, and 17% in 8th grade.

High Schoolers Discuss College

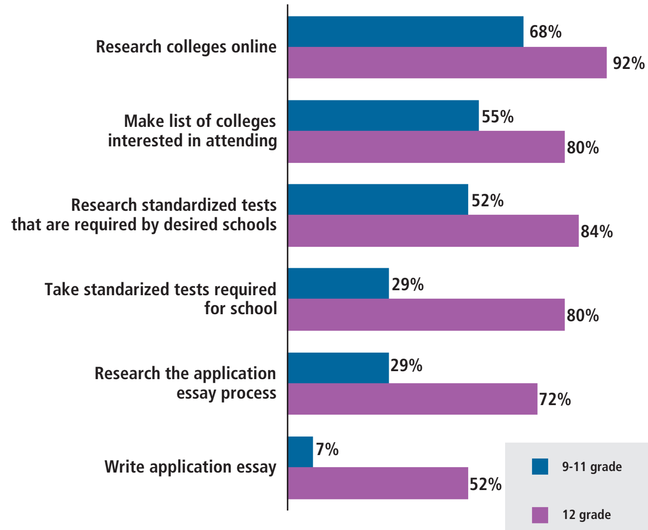
Girl high school students are more likely than their male

WHEN HIGH SCHOOL SENIORS FIRST SPOKE WITH A FAMILY MEMBER, TEACHER, OR COUNSELOR ABOUT ATTENDING COLLEGE



SOURCES: What Kids Can Do, Public Education Foundation, Alliance for Education

STUDENTS' COLLEGE PREPARATION, BY GRADE LEVEL



SOURCES: Alliance for Education, Public Education Foundation, What Kids Can Do

peers to discuss their plans for college. Seven in 10 girls (70%) have spoken with their peers "many times" about college, compared to 56% of boys who have done the same. Girls are also more likely to talk college with school counselors (31% vs. 28%) and teachers (28% vs. 26%).

Parents are the first people White, Black, and Hispanic students turn to if they encounter any problems with their college plans. Asian students are more likely than White, Black or Hispanic students to seek advice from friends, school counselors, or teachers.

Two in three students (68%) participate in an extracurricular activity and 62% volunteer. Asian students (73%) are most likely to volunteer, followed by Whites (73%), Hispanics (60%), and Blacks (51%). White students are most likely to participate in extracurricular activities, followed by Asians (67%), Blacks (60%), and Hispanics (27%).

White students also are most likely to be paid for work (44%), compared to 38% of Blacks (38%), 36% of Asian and 27% of Hispanic students.

The average high school student visits 2-3 campuses and applies to 2-5 schools.

SOURCES: Alliance for Education, 509 Olive Way, #500, Seattle, WA 98101; 206-343-0449; info@alliance4ed.org; www.alliance4ed.org.

Public Education Foundation, 100 E. 10th St., #500, Chattanooga, TN 37402; 423-265-9403; www.pefchattanooga.org.

What Kids Can Do, Barbara Cervone, PO Box 603252, Providence, RI 02906; 401-247-7665; info@whatkidscando.org; www.whatkidscando.org.

High School Seniors Turn To Social Media To Research Colleges

Nearly six in 10 high school seniors (57%) watched a YouTube video created by a college or university when researching potential schools, according to Maguire Associates and financial assistance website FastWeb. A similar percentage (56%) searched for scholarships using social media or networking sites and 53% have read posts about a school on a social network. However, only 15% would contact an admission counselor through a social network.

Students may turn to the Internet to research schools, but once there, they still prefer face-to-face interaction. The vast majority (84%) prefer in-person instruction by professors, while 12% prefer a mix of online and classroom instruction and 2% want to learn only via the Internet.

Two in three (68%) say the economy has "greatly" or "somewhat" influenced their college application choices, up from 60% in 2009. Students ultimately select a school based on quality of major (94%), value (including quality and cost 92%), employment opportunities after graduation (91%), availability of need- or merit-based aid (87%), and total costs (87%).

HIGH SCHOOL STUDENTS' TOP POTENTIAL COLLEGE MAJORS

Health professions	22%
Business	9%
Biological/biomedical sciences	9%
Engineering	8%
Performing/Visual arts	7%
Education	7%

SOURCES: Fastweb, Maguire Associates

SOURCES: Fastweb. Mark Kantrowitz, Publisher, 444 N. Michigan Ave., #600, Chicago, IL 60611, info@fastweb.com; www.fastweb.com.

Maguire Associates, Tara Scholder, SVP, 5 Concord Farms, 555 Virginia Rd., #201, Concord, MA 01742; 978-371-1775, www.maguireassoc.com.

Students On College And Careers

Middle and high school students worry more about having enough money to pay for college (57%) than about being able to get into (31%) or succeed (33%) in college, according to MetLife and Harris Interactive. Half of middle school students (54%) and 60% of their parents rate their schools as fair or poor in providing information to students about college requirements.

College degree is needed. More than eight in 10 middle and high school students (84%) and 77% of corporate executives believe there are few to no career opportunities for those who do not complete some education beyond high school. Teachers predict only 51% of their students will actually graduate from college.

Writing trumps math. English and math teachers are more likely to rate the ability to write clearly and persuasively (99%, 92%) as very important than to view knowledge in higher-level mathematics as absolutely essential (45%, 50%).

Science Less Important Than Communication. Corporate executives rate critical thinking (99%), problem solving (99%), and strong writing skills (97%) as very important for career-readiness, while only 31% say advanced science courses and 40% say advanced math knowledge are essential to the workforce.

Global awareness. Two in three parents (63%), corporate executives (65%), and teachers (63%) feel that knowledge of other cultures and international issues is absolutely essentials to be ready for college and a career.

SOURCE: MetLife, Ted Mitchell, 700 Quaker Ln., Warwick, RI 02887; 401-827-3236; tjmitchell@metlife.com; www.metlife.com.

School Counselors Promote College Attendance

Young adults are evenly split between saying their school counselors did a great job getting to know them (47%) and feeling they were just an anonymous face in the crowd (48%), according to research by Public Agenda for the Bill & Melinda Gates Foundation. Nearly one in five young adults (19%) who believe they were badly counseled delay going to college.

Those who felt their counselors didn't get to know them also are less likely than those who felt they had good relationships with counselors to receive financial aid information (41% vs. 51%) and to be disappointed in their choice of college (46% vs. 35%). They are less likely to select a school based on academic reputation (41% vs. 51%) or to be offered a scholarship (32% vs. 44%).

Even among young adults who say their counselors took the time to get to know them grade their counselors less than favorably. More than four in 10 (45%) rate their counseling skills as "poor" or "fair." They rate other school officials more positively. Three in four young adults (75%) say they had a coach or teacher who really inspired them and motivated them to do their best, and 67% say they had a teacher who encouraged them to attend college.

Young adults who fail to complete college are more likely than those who do graduate to come from families with lower incomes and levels of education. Fewer than half of those with college degrees claim their parents generally had financial trouble throughout their childhood, compared to 58% of those who didn't complete college.

REASONS COLLEGE STUDENTS SELECTED THEIR PARTICULAR SCHOOL

Convenient, close to home/work	25%
Offers major/program of interest	14%
Quality education, teachers, reputation	10%
Right atmosphere, "felt right"	10%
Location	9%
Affordable	8%
Family member, friends attend, parents' choice	5%
Betterment, potential job opportunities	5%
Scholarship, financial aid	4%
Only place accepted	4%
Stepping stone to another college	2%
Good sports program	2%

SOURCE: Public Agenda, Bill & Melinda Gates Foundation

SOURCE: Bill & Melinda Gates Foundation, Kate James, Chief Communications Officer, Foundation Operations, P.O. Box 23350, Seattle, WA 98102; 206-709-3100; www.gatesfoundation.org.

Teens See College As Mandatory

More than nine in 10 teens (91%) are enrolled or plan to enroll in college, and 68% expect to pursue an advanced degree, such as a master's or Ph.D., according to TD Ameritrade.

Even though 80% of teens believe a college education is essential to future success, many aren't willing to go into debt in order to achieve this goal. Only 19% feel the tuition from a "big name" school such as Harvard, Yale, or Princeton is worth the expense, with an additional 15% saying big name schools are not worth the cost because they don't guarantee a job.

Two in three teens (68%) are saving a portion of their own money to pay for college, up from 62% of teens who did so in 2009. Nearly half of teens (48%) say their parents regularly put aside money for their college tuition, more than double the number of adult respondents (26%) who said their parents did the same when they were teens.

SOURCE: TD Ameritrade, Stuart Rubinstein, Managing Director, Online Engagement, 31 W. 52nd St., New York, NY 10019; 212-827-7000; stuart.rubinstein@tdameritrade.com; www.tdameritrade.com.

Applicants Stressed Over College Entrance

The number of college applicants reporting "high" or "very high" levels of stress continues to climb, reaching 69% in 2011, up from 13% in 2003, according to the Princeton Review. Otherwise, applicants' reasoning when choosing schools to apply to remains relatively similar to last year's concerns. Seven in 10 (72%) report the economic downturn has impacted their college decisions and 86% say financial aid will be "very necessary," both similar to responses in 2010.

The statistics most important to applicants include the average SAT score range of admitted freshman (38%), percent of applicants accepted (24%), percent of students receiving financial aid (21%), and graduation rate (17%).

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

Students and parents still differ on distance; 50% of parents hope their child's college is located no more than 250 miles from them. The largest number of students (66%) prefer colleges more than 250 miles away, compared to 64% who said the same in 2010.

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

College Students On Why They Attend College, How They Pay For It, And Volunteer Plans

More than half of college freshmen (53%) took out loans to fund their schooling in 2010, up from 49% who did so in 2008. This is the highest level in a decade, according to the Higher Education Research Institute at UCLA. Nearly three in four (73%) depended on grants and scholarship to help with college costs in 2010, up from 70% in 2009.

Six in 10 college freshman (62%) cite cost as a "very important" factor in determining which college to attend. Some 5% say their fathers are unemployed and 9% have unemployed mothers. These financially-strapped students are almost as likely as freshmen with no financial concerns to have been accepted by their first-choice college in 2010 (78% vs. 80%), but are less likely to have actually enrolled in that school (55% vs. 69%).

Freshman who say the economy has impacted their college plans also are less likely to attend a school more than 100 miles away from home (44% vs. 55%) but more likely to live with family members than on-campus (18% vs. 11%).

Three in four freshman (73%) feel the primary benefit of attending college is that it increases earning power, up from 53% who felt this way in 1971. Other "very important" reasons freshman attend college include to learn about things that interest them (83%), gain a general education and appreciation of ideas (73%), to prepare for graduate school (60%), and to become a more cultured person (51%).

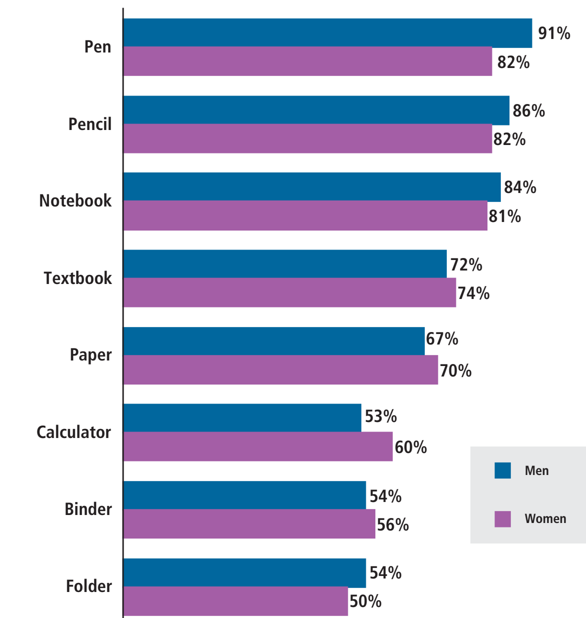
Three in 10 (31%) indicate there is a "very good chance" they will volunteer in college. A similar percentage (32%) believe there's a "very good chance" they will study abroad during their college years.

SOURCE: Higher Education Research Institute at UCLA, Sylvia Hurtado, Director, 3005 Moore Hall, Box 951521, Los Angeles, CA 90095; 310-825-1925; www.heri.ucla.edu.

Pens, Pencils Top Items In College Students' Backpacks

If you need to borrow a pen, it's best to ask a male college student, according to Ypulse. More than nine in 10 men (91%) carry at least one pen in their backpack, compared to only 82% of women college students. Women, however, are slightly more likely than men to have a piece of paper (70% vs. 67%).

WHAT COLLEGE STUDENTS CARRY IN THEIR BACKPACKS, BY GENDER



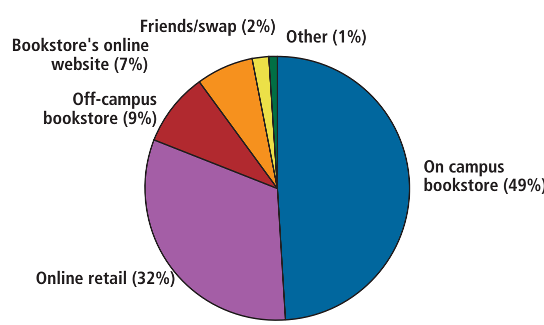
SOURCE: Ypulse

SOURCE: Ypulse, Dan Coates, President, 130 William St., 6th Fl., New York, NY 10038; 888-292-8855, x2, dan@ypulse.com; www.ypulse.com.

College Textbook Sales Total $7.5 B

College students spend $7.5 billion on college textbooks, according to digital learning platform Xplana. The majority

WHERE COLLEGE STUDENTS PURCHASE TEXTBOOKS



SOURCE: Xplana

of sales come from on-campus bookstores (49%) and online retailers (32%).

While digital textbook sales currently represent a small portion of the overall textbook market (0.5%), they are projected to comprise 18% of the textbook market by 2018.

SOURCE: Xplana, Rob Reynolds, Chief Product Designer, 573-239-9025, rreynolds@xplana.com; www.xplana.com.

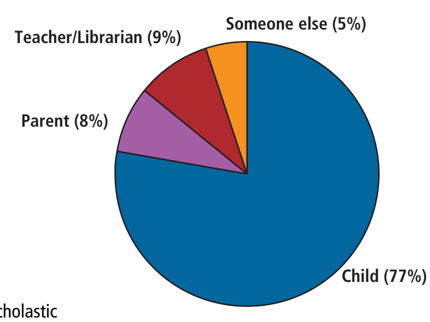
Kid Readers Enjoy Opening Their Imagination

Nine in 10 girls 6-17 (90%) and 81% of boys the same age feel proud and have a sense of accomplishment when they finish reading a book, according to Scholastic. Both parents and children agree the most important outcome in reading books for enjoyment is to open up the imagination and be inspired.

Nearly eight in 10 children and teens (79%) read for fun at least weekly, though there is a steady decline in the frequency after age eight. Parents aren't snobby about their children's reading selections. Only 11% "strongly prefer" their children read classic or award-winning books. Parents of girls are slightly more likely than parents of boys to feel this way (13% vs. 10%).

The most effective ways to ensure a child loves to read includes keeping interesting and kid-friendly titles at home, placing time limits on their usage of electronics, and having a parent who also loves to read books.

THE PERSON WHO SELECTED THE LAST BOOK 6-17-YEAR-OLDS READ AND FINISHED



SOURCE: Scholastic

SOURCE: Scholastic, Francie Alexander, Chief Academic Officer, 557 Broadway, New York, NY 10012; 212-343-6100; falexander@scholastic.com; www.scholastic.com.

Weighing The Influence Of Digital Technology On Teachers' Roles

As technology becomes an essential teaching tool, there is a definite divide between the experienced and less-experienced teacher, according to Scholastic. Two in three teachers with fewer than three years of experience (66%) feel digital resources engage their students in learning, compared to 45% of teachers with more than 20 years of experience who express similar beliefs. Half of new teachers (51%) believe digital resources help students' academic achievement compared to 34% of the veteran teachers.

Students, themselves, tend to want technology both in and out of the classroom. Nearly six in 10 6-17-year-olds (57%) express interest in reading a book on a digital device, such as a computer or e-reader. One in four have already done so. However, even with access to e-books, two in three children and teens say they will still read traditional print books.

Children and teens may flock to technology, but they are far from web-savvy. Four in 10 6-17-year-olds say the information they find online is "always accurate."

Redefining The Role Of Teachers

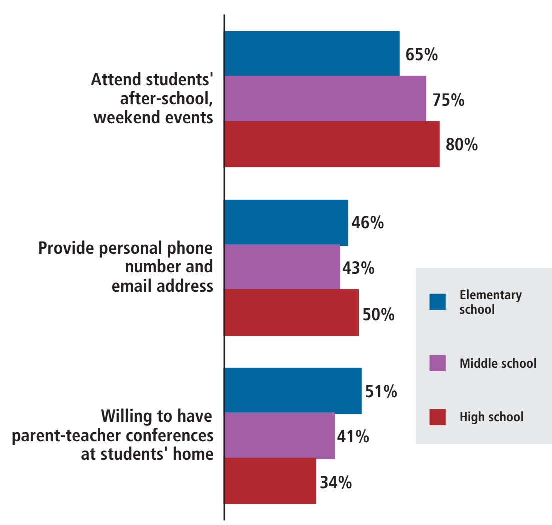
With education reform continuing to be a key issue, teachers are weighing in with their thoughts, including the move to redefine what it means to teach. Nearly all teachers (93%) believe schools must provide students with more than just a diploma. More specifically, teachers feel schools need to prepare students for careers relevant for the 21st century (71%), teach them ways to succeed at college (11%), and how to deal with life skills management (11%), including understanding a mortgage and managing a bank account.

Only 16% of teachers "agree strongly" that students enter their classrooms prepared for their specific grade level. Notably, 11th and 12th grade teachers are more likely than 9th and 10th grade teachers to feel their students are academically on-track and will succeed in college.

Teachers' reasons for the lack of students' success fall into three areas: lack of academic preparation (38%), lack of student motivation (34%), and lack of encouragement from family and friends (27%). They feel the best ways to improve students' achievement include having clearer academic standards (95%), establishing common standards across states (90%), and tougher academic standards (85%).

Eight in 10 high school teachers (81%) attend after-school and weekend events in which their students participate, according to Scholastic. Half of elementary school teachers (51%) are even willing to have parent/teacher conferences at students' homes.

TEACHERS' INVOLVEMENT WITH THEIR STUDENTS OUTSIDE OF THE CLASSROOM, 2010



SOURCE: Scholastic

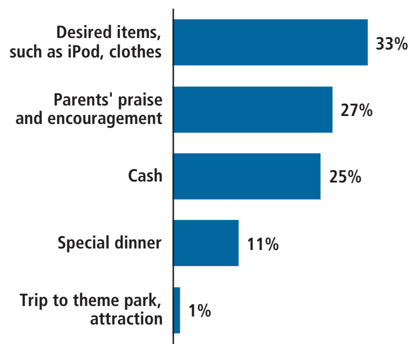
SOURCE: Scholastic, Francie Alexander, Chief Academic Officer, 557 Broadway, New York, NY 10012; 212-343-6100; falexander@scholastic.com; www.scholastic.com.

Students And Parents Support Incentives For Good Grades

More than three in four children and teens under 17 (77%) feel their parents should give rewards for good grades, according to Northwestern Mutual Foundation. Six in 10 parents over 30 (60%) agree with this sentiment.

Children and teens are most likely to be motivated by "desired items" (33%) such as clothes, games, or an iPod, though one in four (27%) feel their parents' encouragement is enough of an incentive. Students are less enthused over experiential incentives such as a "special dinner at a favorite restaurant" (11%) or a visit to a theme park or attraction (1%).

TOP MOTIVATORS TO STUDENTS FOR ACHIEVING GOOD GRADES



SOURCE: Northwestern Mutual Foundation

SOURCE: Northwestern Mutual, Jean Towell, 720 E. Wisconsin Ave., Milwaukee, WI 53202; 800-323-7033; www.northwesternmutual.com.

How Students Measure In Reading, Math, Science

U.S. students outperform their international counterparts on reading literacy, possess similar levels of science literacy, and are less successful in math literacy, according to the Program for International Student Assessment (PISA) and the National Center for Education Statistics. Three in 10 U.S. 15-year-olds (30%) are capable of reading difficult tasks, such as embedded information, construing meaning from nuances in languages, and critically evaluating a text, Girls score slightly higher on literacy scales than boys, while Blacks and Hispanics have lower averages than White students. Slightly less than two in 10 U.S. students (18%) score below the baseline level of reading proficiency.

Nearly three in 10 U.S. students (27%) score at or above math proficiency levels demonstrating they can solve problems that involve visual and spatial reasoning and carry out sequential processes. Slightly more than two in 10 (23%) score below a baseline level of math proficiency.

Three in 10 U.S. students (29%) can integrate explanations from different disciplines of science to connect to life situations. Two in 10 (18%) are below baseline level of proficiency for science.

SOURCE: National Center for Education Statistics, Holly Xie, 1990 K St., NW, Washington, DC 20006; 202-502-7314; holly.xie@ed.gov; www.nces.ed.gov.

Girls Prefer Single-Gender Classes More Than Boys

Two in three students in grades K-12 (65%) say their enjoyment of school increased when they started attending single-gender classes, according to South Carolina Department of Education.

Girls believe their single-gender classes have increased their academic performance and attitudes more than their male peers think single-gender classes have improved their performance. Black students also respond more positively than White students.

SOURCE: South Carolina Department of Education, David Chadwell, Education Associate, Office of Public School Choice and Innovation, 1429 Senate St., #707-C, Columbia, SC 29201; 803-609-9654; dchadwel@ed.sc.gov; www.ed.sc.gov.

Preschool Private And Public Enrollments Skew White

There are nearly eight million kids 3-6 enrolled in nursery school and more than six million enrolled in kindergarten, according to U.S. Census figures. However, there's a notable discrepancy depending on the child's race/ethnicity. White children are significantly more likely than Black or Hispanic children to attend public or private nursery school.

Asian families, per their cultural backgrounds, tend not to place their children in pre-kindergarten programs and prefer to educate their children at home.

SCHOOL ENROLLMENT, 3-6-YEAR-OLDS, BY RACE/ETHNICITY
(In thousands)

	NURSERY		KINDERGARTEN		ELEMENTARY	
	PUBLIC	PRIVATE	PUBLIC	PRIVATE	PUBLIC	PRIVATE
White	1,832	1,572	2,835	293	2,375	247
White, non-Hispanic	1,188	1,387	1,982	262	1,585	213
Black	640	171	575	40	427	51
Asian	107	132	146	21	147	20
Hispanic	717	213	916	32	878	34
TOTAL	4,484	3,475	6,454	648	5,412	565

SOURCE: National Center for Education Statistics

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

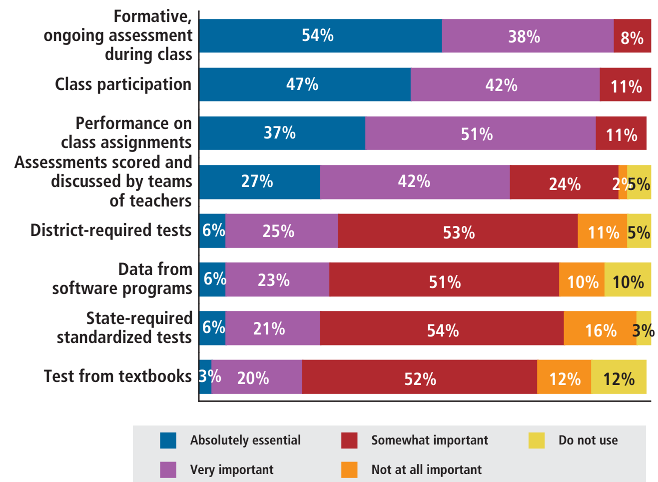
U.S. Census Bureau, Public Information Office, 400 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov.

Teachers Cite Family, Friend Support, And Drive As Key Student Motivators

Teachers attribute the reasons they feel high school students are unprepared for college to a lack of encouragement from family and friends (38%), lack of student motivation (34%), and a lack of academic preparation (27%), according to the Gates Foundation and Scholastic.

Formative, ongoing assessments and class participation are cited as two of the more effective ways to measure academic achievement.

MOST EFFECTIVE WAYS TO MEASURE STUDENT PERFORMANCE, ACCORDING TO TEACHERS



SOURCES: Scholastic, Bill & Melinda Gates Foundation

SOURCES: Bill & Melinda Gates Foundation, Kate James, Chief Communications Officer, Foundation Operations, P.O. Box 23350, Seattle, WA 98102, 206-709-3100; www.gatesfoundation.org.

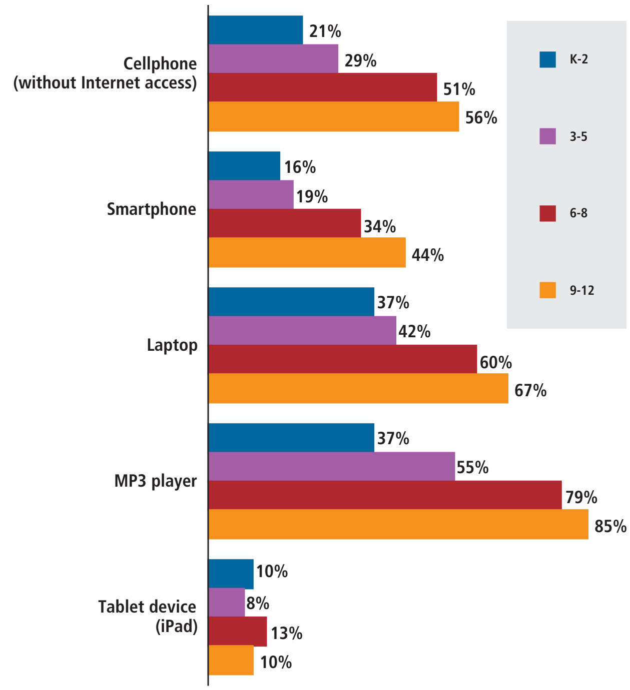
Scholastic, Francie Alexander, Chief Academic Officer, 557 Broadway, New York, NY 10012; 212-343-6100; falexander@scholastic.com; www.scholastic.com.

Students Want More Technology In Classrooms; Principals Want Less

Students' ownership of high-tech devices increases significantly between elementary and middle school, according to educational advocacy group Project Tomorrow. More than half (51%) of 6th to 8th graders own non-Internet cellphones, and 34% own smartphones, compared to 29% and 19%, respectively, of 3rd to 5th graders. Laptop ownership also rises from 42% to 60% during the same time frame. Interestingly, the same number of students in grades K-2 claim to own a tablet device as those in high school (both 10%) — most likely the younger children are referring to their parents' tablets.

Two in three parents are willing to buy their children a mobile device if the school allows it, and 61% like the idea of students using mobile devices to access online textbooks.

TECHNOLOGY OWNERSHIP BY GRADE LEVEL



SOURCE: Project Tomorrow

However, 65% of principals say there is little to no chance their students will use their own mobile devices for instructional purposes in 2011.

Schools are more likely to allow their students Internet access. Three in 10 high schools (30%) and 19% of middle schools offered classes with some type of Internet curriculum in 2010, up from 18% of high schools and 13% of middle schools that did so in 2009.

More than half of students (53%) do not think their schools are doing a good job of leveraging new technologies to enhance learning. Three in four high school teachers (74%), 72% of principals, and 62% of parents of high school students feel their schools are doing a good job of using technology to enhance learning.

WAYS HIGH SCHOOL STUDENTS WANT TO BE ABLE TO USE CELLPHONES AT SCHOOL

Check grades	74%
Conduct research	68%
Take notes in class	59%
Collaborate, communicate with friends	53%
Use calendar	50%
Access online textbooks	44%
Send emails	44%
Learn about school activities	40%
Create and share documents and video	37%

SOURCE: Project Tomorrow

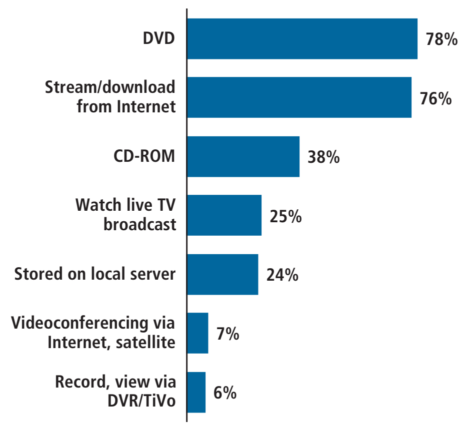
SOURCE: "Speak Up 2010,"" Project Tomorrow, Julie Evans, CEO, 15707 Rockfield Blvd., #250, Irvine, CA 92618; 949-609-4660, x15; jevans@tomorrow.org; www.tomorrow.org.

Digital Tech Usage Is Up In Classrooms

Nearly all K-12 teachers (97%) use digital media for classroom instruction, according to Grunwald Associates and PBS. One in four (24%) use digital media every day.

Teachers who stream or download video content increased from 55% in 2007 to 76% in 2010. This increased usage matches their growing perceptions of the benefits for their students. Two in three teachers (66%) feel video content increases student motivation, 47% feel it increases student creativity, and 42% say it increases student achievement. Teachers admit to needing tech support. Three in four (78%) encounter difficulties, such as skipping or pausing, when streaming video.

VIDEO CONTENT USED IN THE CLASSROOM



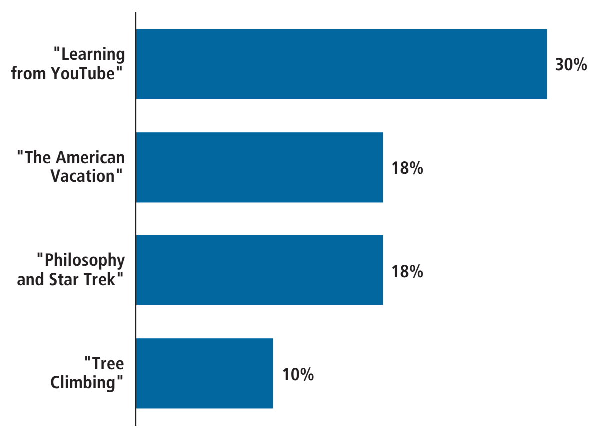
SOURCES: Grunwald Associates, PBS

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

PBS, Rob Lippincott, SVP Education, 2100 Crystal Dr., Arlington, VA 22202; 703-739-5000; www.pbs.org.

factoids

- Sixty-eight percent of college students feel they were adequately prepared to handle first-year **college coursework**; 69% of high school teachers feel their graduating seniors are not adequately prepared for college coursework. *(Deloitte; phone: 203-708-4806)*
- More than half (51%) of **school teachers** avoid doing certain types of projects with their classes because they dread having to clean up afterwards. *(Procter & Gamble; phone: 513-983-1100)*
- The average **parent-teacher conference** lasts 20 minutes. *(Family Education Network; phone: 617-671-2000)*
- By 2015, 25% of sales revenues from new **textbooks** will be from e-books. *(Xplana; phone: 573-239-9025)*
- Half of Americans think U.S. **public schools** are getting worse. *(United Way Worldwide; phone: 703-836-7112)*
- Only 3% of Americans think people who go to Ivy League **colleges** make better workers. *(Rasmussen Reports; phone: 732-776-9777)*
- College administrators feel the most effective way to **communicate with students** is via email (75%), followed by web postings (45%), and text messaging (33%). *(Campus Management Corp.; phone: 800-483-9106)*
- Nearly a quarter of adults with **college degrees** (23%) ignore search engine ads, compared to 17% who have high school diplomas or less education. *(Adweek/Harris Interactive; phone: 212-539-9600)*
- More than half of U.S. adults (57%) think **college students** receive a fair to poor return for their investment in education. *(Pew Research Center; phone: 202-419-4300)*
- **COLLEGE COURSES U.S. ADULTS CONSIDER "WORTH THE TUITION"**



NOTE: Courses were selected from curricula at U.S. colleges or universities.

SOURCE: *Vanity Fair/60 Minutes* Poll; phone: 212-286-8180

- More than half of families (52%) with children in elementary, middle, or high school will buy **electronics** as part of their 2011 back-to-school shopping. *(National Retail Federation; phone: 202-783-7971)*
- Half of parents say they won't do any of their **back-to-school** shopping online in 2011. *(Accenture; phone: 312-842-5012)*
- The number of people applying to full-time **M.B.A. programs** declined 10% between fall 2010 and fall 2011. *(Graduate Management Admission Council; phone: 703-668-9600)*
- More than three quarters (78%) of lawyers, 70% of U.S. Senators, and 65% of doctors in the U.S. are alumni of **fraternities or sororities**. *(The Odyssey; phone: 888-272-2595)*

emerging majorities & cultural values

The face of America is increasingly diverse, and that's changing Americans' notions of beauty. The majority of U.S. men and women consider mixed-race features to be the ideal; seven in 10 say they could be attracted to someone of a different race than their own.

By 2020, non-Hispanic White families will be in the minority; currently four in 10 households with children are Black, Hispanic, and/or Asian. Where once immigrants strove to blend into U.S. culture, now recent arrivals seek to preserve their unique heritage at the same time that they adapt to their new surroundings. The result is an increasingly multicultural nation that is intermixed but not homogenized, in which so-called ethnic foods, music, fashion, and words find their way into mainstream culture as well.

Culturally driven differences in attitudes, motivations, and behavior extend to many areas of life, from media use and device ownership to shopping and spending, to philanthropic activities. For example, Black Americans spend more time than members of any other racial/ethnic group watching television, while Hispanics are the biggest moviegoers, especially among 18-24-year-olds. Asian families spend the largest proportion of their household food budgets on dining out.

Asians, Blacks, and Hispanics are more likely than non-Hispanic Whites to live in multigenerational households, and the number of these households is growing rapidly.

College enrollment among Hispanics is growing four times faster than that among Asians and Blacks, while that among Whites is decreasing. Black and Hispanic Millennials are more likely than their White counterparts to view owning a business as a sign of success.

These attitudinal differences suggest patterns of change for U.S. society in the near future.

Multigenerational Households On The Rise, Especially Among Non-Whites

Asians, Blacks, and Hispanics are more likely than Whites to live in multigenerational households — more than a fifth of each group do, compared with 13% of non-Hispanic Whites, according to the Pew Research Center.

Between 2007 and 2009, the number of Americans living in multigenerational households grew from 46.5 million to 51.4 million — an increase of nearly 11%. The largest increase in multigenerational living took place among Hispanics — 18%. The number of Blacks living in multigenerational households grew 9%, Whites 9%, and Asians 7%.

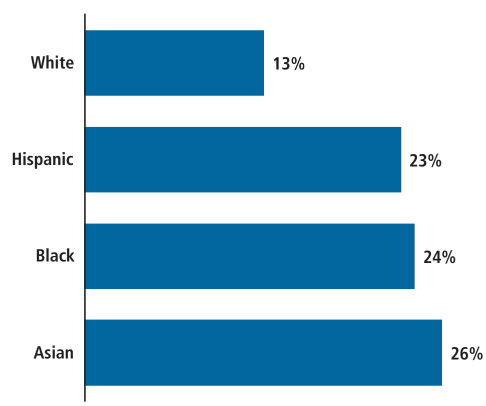
Although the numbers of Americans living in multigenerational households have been increasing steadily since 1980, the average rate of growth has hovered around 2% annually. The recent spike is a response to continuing economic hardship — and although incomes among multigenerational households are lower (after adjusting for household size) than those among other households, their poverty rates are also lower: 12% vs. 15%.

For unemployed adults, living with relatives makes a significant difference: 18% of those in multigenerational households are below the poverty line, compared with 30% of unemployed people living in other household types.

The median household incomes of Hispanics who live in multigenerational households are 19% higher than those of Hispanics living in other types of households; Blacks living in multigenerational households have incomes 11% higher than those in other households. There are also income differences between multigenerational and non-multigenerational households with foreign-born heads of house.

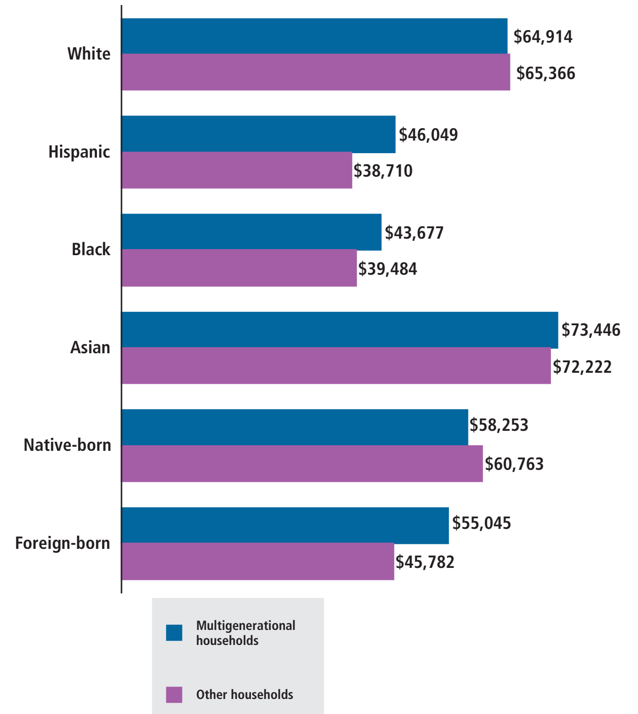
More than half of multigenerational households (58%) consist of two adult generations — typically a household head living with either an adult child or a parent. Adults ages 25-34 are the most likely age group to live in multigenerational households, and also the group that saw the biggest increase in such living arrangements (up 17% between 2007 and 2009). Nearly eight in 10 25-34-year-olds who lived in multigenerational households (79%) in 2009 were living

AMERICANS WHO LIVE IN MULTIGENERATIONAL HOUSEHOLDS, BY RACE/ETHNICITY



SOURCE: Pew Research Center

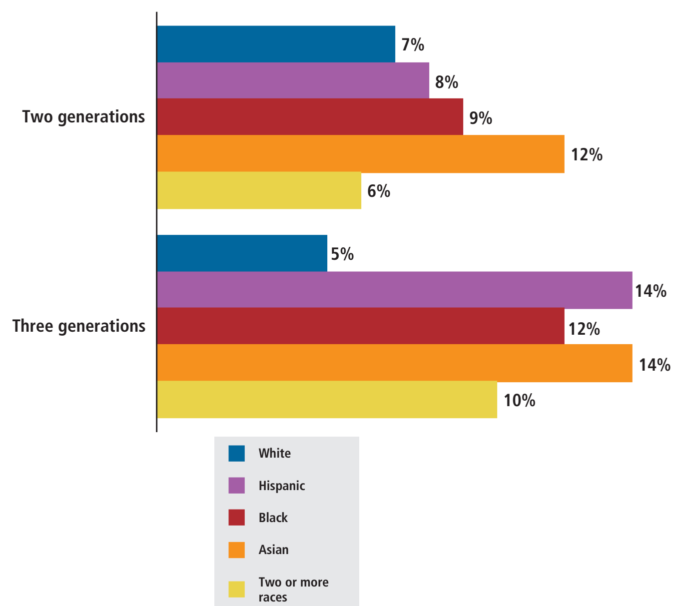
MEDIAN HOUSEHOLD INCOMES, MULTIGENERATIONAL HOUSEHOLDS VS. OTHER HOUSEHOLDS, BY RACE/ETHNICITY AND PLACE OF BIRTH



NOTE: Incomes adjusted for household size.

SOURCE: Pew Research Center

NUMBER OF GENERATIONS LIVING IN MULTIGENERATIONAL HOUSEHOLDS, BY RACE/ETHNICITY



SOURCE: Pew Research Center

with either their own parents or a head-of-house of their parents' age.

Hispanic and Asian multigenerational households tend to have larger numbers of members contributing to the overall household income than other multigenerational households do — an average of 2.6 income earners per household, compared to 2.1 earners in White households and 2.0 earners in Black households.

SOURCE: "Fighting Poverty in a Tough Economy, Americans Move in With Their Relatives," October 2011, Pew Research Center, Paul Taylor, Director, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4372; info@pewsocialtrends.org; www.pewsocialtrends.org. Price: Available online at no charge.

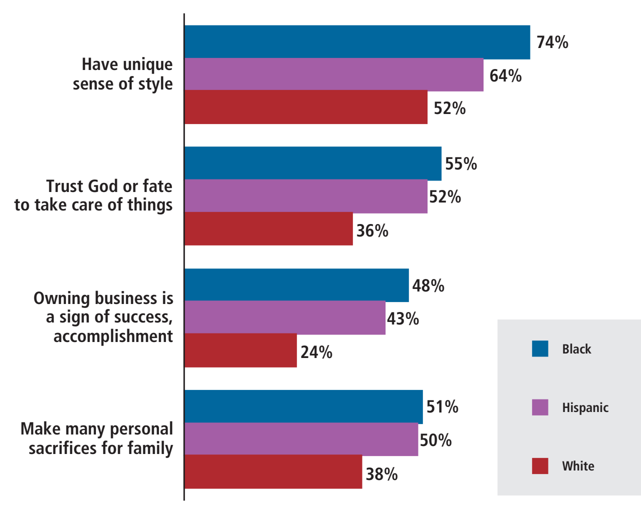
Millennials Maintain Pride In Own Cultures

Millennials are more diverse ethnically and racially than older generations. Ethnic children, for instance, will compose the majority of children under age 18 by 2019, according to the U.S. Census Bureau.

This diversity brings forth more openness and acceptance towards other cultures, according to Yankelovich. More than one in four millennials (27%) consider themselves extremely open to and accepting of other cultures, compared to 14% of seniors who feel the same.

Even though Millennials are open to other cultures, they also possess high levels of pride in their own cultures. The majority of Black (85%) and Hispanic (76%) Millenials say they would like to participate in more activities that celebrate their culture and heritage.

MILLENNIAL ATTITUDES AND BELIEFS, BY RACE/ETHNICITY, 2011



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.

Mixed-Race Is Now Beauty Ideal

Nearly two thirds of women (65%) and 62% of men believe that mixed-race/ethnicity women are considered the beauty ideal, according to *Allure* magazine. This represents a radical shift from 1991, when a similar survey found the perceived ideal to be the all-American blonde personified by Christie Brinkley.

When asked to choose the most attractive man and woman from a series of photographs of models of various races and ethnicities, 54% of women and 48% of men selected a Latina model. Six in 10 women (61%) chose an Indian male model as most attractive. Seven in 10 adults say they could be attracted to someone of a different race or ethnicity than their own.

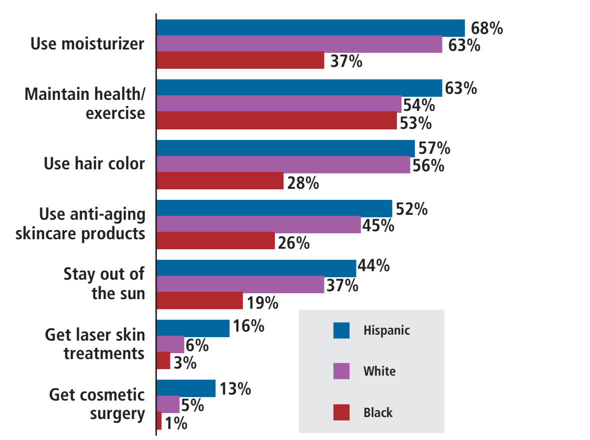
More than eight in 10 men (82%) and women (87%) believe that the increased diversity of the U.S. population has changed what people consider beautiful. Seven in 10 women (71%) and 67% of men think there's no longer such a thing as an "all-American" look.

Changing ideals have manifested in new preferences for skin tone and hair color, shape/predominance of facial features, and body dimensions and shapes. For example, 75% of men and 73% of women say that a curvy body type is considered more appealing now than it has been over the last 10 years. Among women who would like to change their skin tone, 70% would like it to be darker.

African American women exhibit the greatest self-confidence about their own looks, rating themselves an average of eight on a 10-point scale of attractiveness, compared to Hispanics and Caucasian women, who rate themselves an average of five. African American women are least likely to be on diets, and most likely to believe that a male stranger would find them very attractive.

That confidence persists into later life; a third of Black women say they plan to do nothing at all to fight the signs of aging, while 85% of White and Hispanic women will be taking steps to ward off visible signs of age.

HOW WOMEN PLAN TO FIGHT SIGNS OF AGING, BY RACE/ETHNICITY



SOURCE: *Allure* magazine, March 2011

SOURCE: "The Allure American Beauty Survey," Allure Magazine, March 2011, Elizabeth Bliss, Public Relations Manager, 4 Times Sq., New York, NY 10036; 212-286-4588; elizabeth_bliss@condenast.com; www.allure.com. Price: Full survey results are in the March 2011 issue, $2.95; selected data are online: http://www.allure.com/magazine/2011/03/american-beauty-census#slide=1

Internet Use Varies By Race/Ethnicity

Hispanics are less likely than Blacks and Non-Hispanic Whites to have broadband Internet access at home, according to the Pew Hispanic Center. They're also less likely than Whites to use the Internet at all, or to own cell phones — though there are no significant differences between Hispanics and Blacks in these areas.

When comparing Hispanics and Whites with similar levels of income and education, gaps in Internet usage, home broadband access, and cell phone ownership disappear.

Among Internet users, 84% of Whites have broadband at home, compared to 78% of Blacks and 69% of Hispanics. Although Hispanics are less likely than Whites to own cell phones, Hispanic cell phone owners are more likely than their Non-Hispanic White counterparts to use their phones to access the Internet (40% vs. 34%), send/receive email (36% vs. 31%), and use instant messaging (45% vs. 24%).

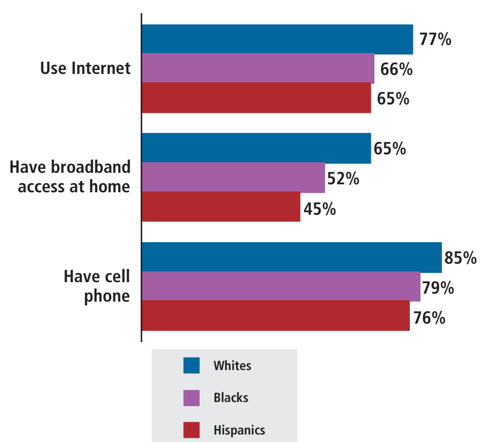
Blacks who own cell phones (51%) are more likely than either Whites or Hispanics to access the Internet from their phones. Both Blacks and Hispanics (6% of each) are more likely than Whites (1%) to access the Internet from their cell phones in lieu of having Internet service at home.

Young Hispanics and those born in the U.S. are more likely than older and foreign-born Hispanics to use the Internet. English-dominant and bilingual Hispanics are more likely than their Spanish-dominant counterparts to be online, as well. There is a slight male skew among Hispanic Internet users, while there are no gender differences in Internet use among Blacks and Whites. When looking specifically at home Internet use, however, both Black men (62%) and Hispanic men (58%) are slightly more likely than Black women (55%) and Hispanic women (53%) to be online.

Many demographic and lifestyle factors affect cell phone ownership among Hispanics, including age, gender, language preference, income, education, and geography. Suburban-dwelling Hispanics are less likely than either urbanites or rural dwellers to own cell phones. Perhaps cell phones provide a source of connection that's more needed in rural areas than suburban ones.

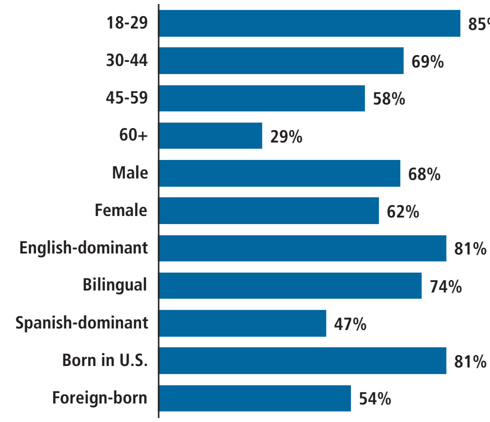
SOURCE: "Latinos and Digital Technology, 2010," February 9, 2011, Pew Hispanic Center, Gretchen Livingston, Senior Researcher, 1615 L St., NW, #700, Washington, DC 20036; 202-419-3600; info@pewhispanic.org; www.pewhispanic.org. Price: Available online at no charge.

AMERICANS' INTERNET AND CELL PHONE USE, BY RACE/ETHNICITY, 2010



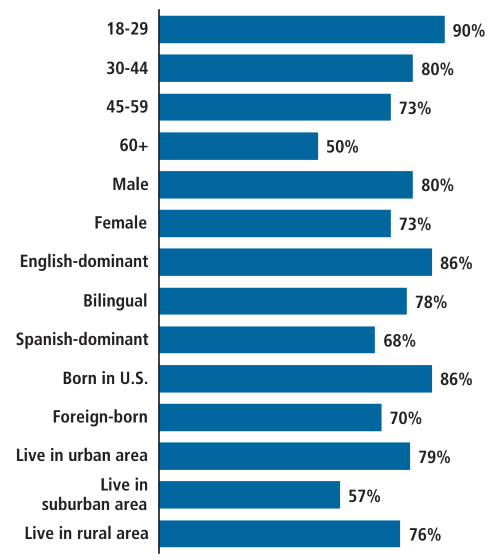
SOURCE: Pew Hispanic Center

HISPANICS WHO USE THE INTERNET, BY SELECTED CHARACTERISTICS



SOURCE: Pew Hispanic Center

HISPANICS WHO OWN CELL PHONES, BY SELECTED CHARACTERISTICS



SOURCE: Pew Hispanic Center

White Families Will Be Minority By 2020

Four in 10 U.S. households with children under 18 are African American, Hispanic, and/or Asian American, and the majority will be by 2020, according to Nielsen. Already, nearly half of families (47%) whose head of the household is age 33 or younger are Black, Hispanic, and/or Asian.

African American households own an average of four TV sets and watch about 40% more hours of TV than the average U.S. household. They also index above-average for watching premium cable channels.

They use the most mobile voice minutes of any racial/ethnic group — an average of 1,261 per month.

Hispanic households are more likely than the average U.S. household to have cell phones with Internet (55%) and video (40%) capabilities, and they're the heaviest users of text messaging. Ownership of smartphones is highest among Hispanics and Asians (45% each).

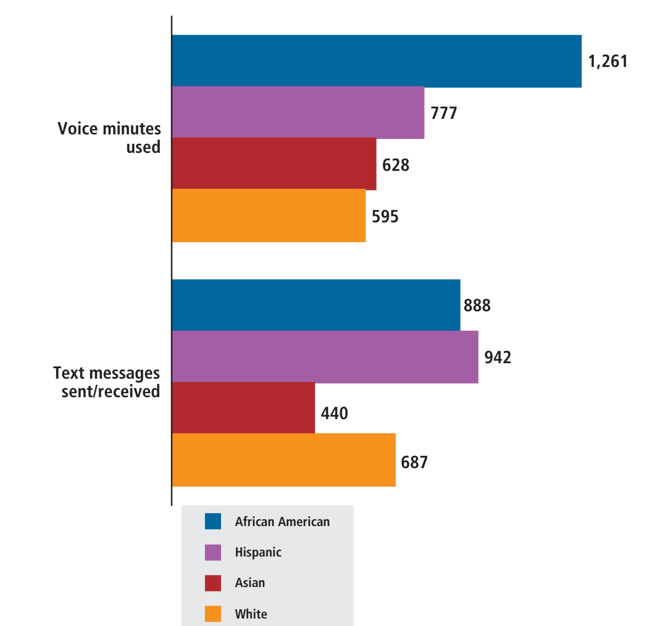
Hispanics are three times more likely to use mobile banking services (30%) than online banking (11%). Although fewer Hispanic households have Internet access than the national average (62% vs. 77%), those that do have access spend just as much time online as overall U.S. households (26 hours).

Asian Americans outpace other groups in time spent on the Internet — spending 80 hours per month online from computers, and viewing 3,600 web pages — more than three times as many as any other group. Though they watch less TV than other racial/ethnic groups, they stream twice as much online video as the average household.

While online, African Americans tend to visit music sites, Hispanics spend time at Latin-topical sites such as MSN Latino, and Asians prefer technology sites.

SOURCE: "The New Digital American Family, April 2011," Nielsen, Doug Anderson, SVP Research and Thought Leadership, 700 Broadway, New York, NY 10003; 646-654-5000; also, Elizabeth Luke, Communications Analyst – Mobile; elizabeth.luke@nielsen.com; www.nielsen.com. Price: Available online at no charge.

MONTHLY MOBILE PHONE VOICE AND TEXT USE, BY RACE/ETHNICITY



SOURCE: Nielsen

Blacks And Hispanics Give To Causes

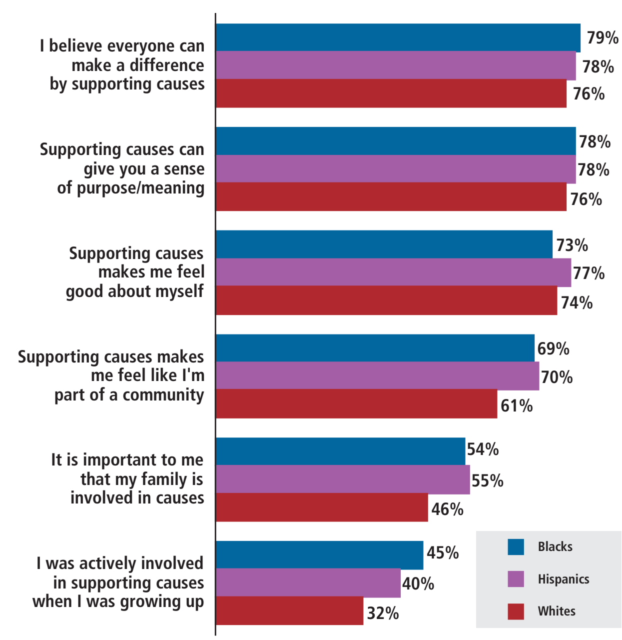
More than half of Blacks (53%) and Hispanics (52%) are actively involved with causes, compared to 42% of Non-Hispanic Whites, according to a study by Georgetown University and Ogilvy Public Relations. In addition to being more likely than Whites to get involved with causes, Blacks and Hispanics have different reasons for becoming involved, gravitate toward different causes, and participate in different ways than Whites.

They're more likely than Whites to value social networking as an avenue for promoting and supporting social issues and causes and more likely to name social media as a top source of information on causes.

Blacks and Hispanics emphasize the community aspects of getting involved with causes, and they're more likely than Whites to make efforts to get their families involved or to have started their participation in childhood.

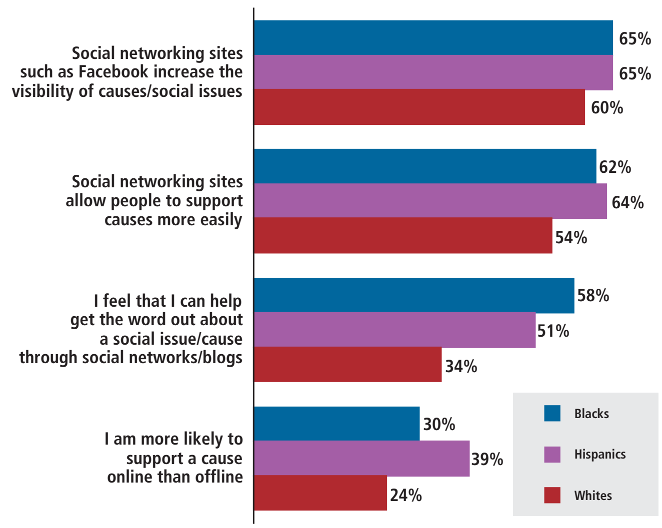
Blacks and Hispanics are more likely than Whites to be involved in programs for diabetes, domestic violence, bullying, childhood obesity, and relief efforts for Haiti. Blacks are more likely than Whites or Hispanics to be involved in

AMERICANS' ATTITUDES ABOUT SUPPORTING CAUSES, BY RACE/ETHNICITY



SOURCE: Georgetown University

AMERICANS' ATTITUDES ABOUT SOCIAL NETWORKS AND INTERNET AS TOOLS FOR SUPPORTING CAUSES, BY RACE/ETHNICITY



SOURCE: Georgetown University

efforts to combat hunger and breast cancer. Hispanics are more likely than Whites or Blacks to be involved in efforts around global warming, gay marriage, and autism.

SOURCE: "Dynamics of Cause Engagement," Center for Social Impact Communication, Georgetown University, Julie Dixon, Deputy Director, 3101 Wilson Blvd., Arlington, VA 22201; 202-687-8552; jld227@georgetown.com; http://csic.georgetown.edu. Price: Available online at no charge.

Hispanic Women Spend Most Time On Housework; Black Men Have Most Leisure

Hispanic women spend more time than women of other racial/ethnic groups performing daily household duties — an average of two and a half hours per day, according to the Bureau of Labor Statistics.

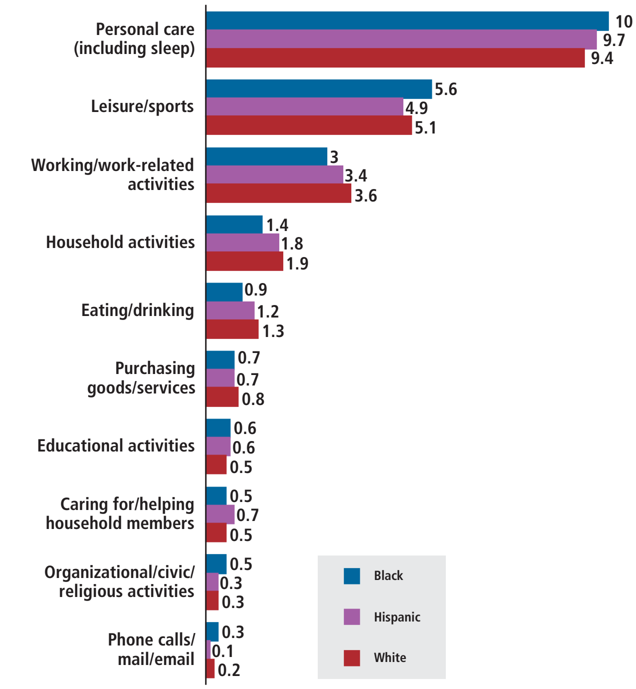
White and Hispanic men spend more time on work and work-related tasks than Black men do (just over four hours per day for White and Hispanic men, compared to 3.7 hours for Black men). Black men spend more time on sports and leisure activities than White or Hispanic men (6.1 hours for Black men, vs. 5.5 hours each for White and Hispanic men).

Women of all races/ethnicities spend less time on leisure activities than men do. Hispanic women spend about four and a quarter hours on leisure activities or sports on a given day, while Black women spend nearly an hour more.

Black women spend more than 10 hours on personal care activities, but this includes time spent sleeping. Black women and men spend almost twice as much time participating in civic, religious, or organizational activities as Hispanics or Whites do.

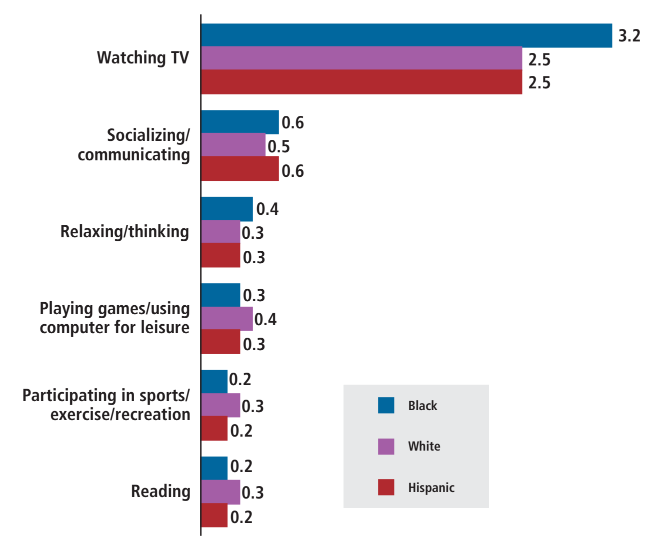
Even on weekends, Blacks spend more time engaged in sports or leisure activities than Whites or Hispanics do, but the disparities are smaller than during the week.

DAILY HOURS SPENT ON VARIOUS ACTIVITIES IN 2010, BY RACE/ETHNICITY



SOURCE: Bureau of Labor Statistics

DAILY HOURS SPENT ON SPECIFIC LEISURE ACTIVITIES ON WEEKDAYS, BY RACE/ETHNICITY



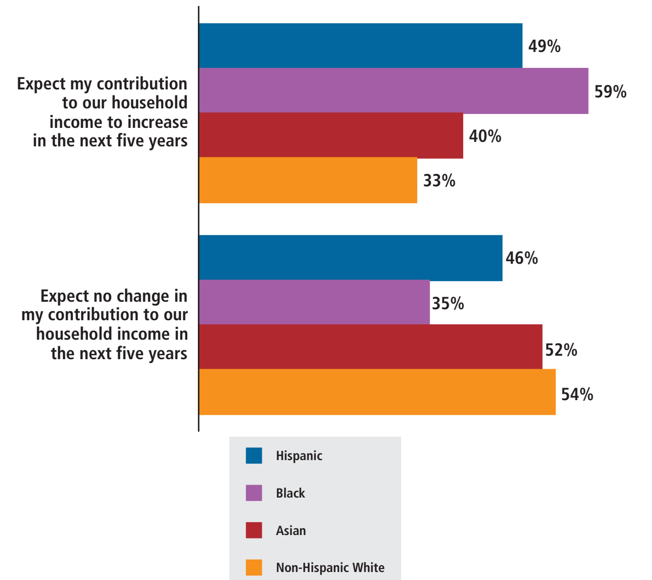
SOURCE: Bureau of Labor Statistics

SOURCE: "American Time Use Survey, 2010 Results," June 22, 2011, Bureau of Labor Statistics, Division of Information and Marketing Services, 2 Massachusetts Ave., NE, #2850, Washington, DC 20212; 202-691-5200; atusinfo@bls.gov; www.bls.gov/tus. Price: Availabile online at no charge.

Black And Hispanic Women Are More Optimistic Than Non-Hispanic Whites

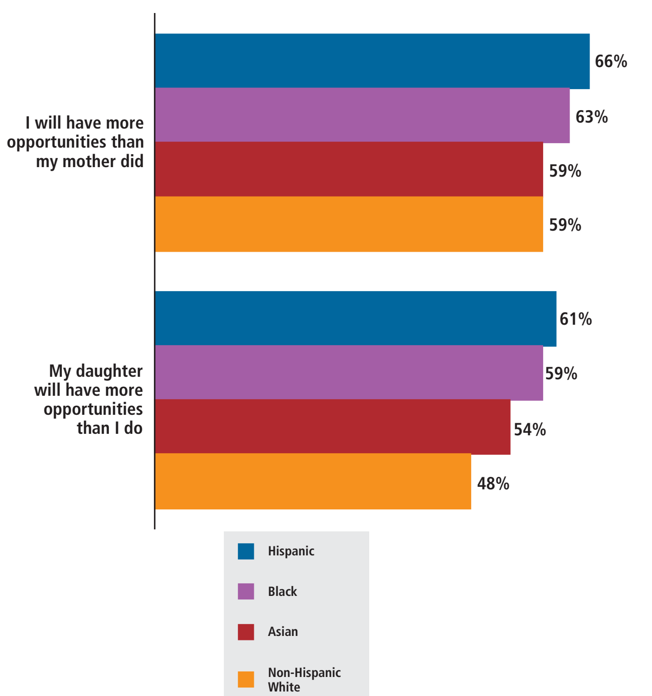
Black and Hispanic American mothers are more likely than their non-Hispanic White counterparts to believe their daughters will have more opportunities than they do,

U.S. WOMEN'S EXPECTATIONS ABOUT THEIR INCOME IN THE NEXT FIVE YEARS, BY RACE/ETHNICITY



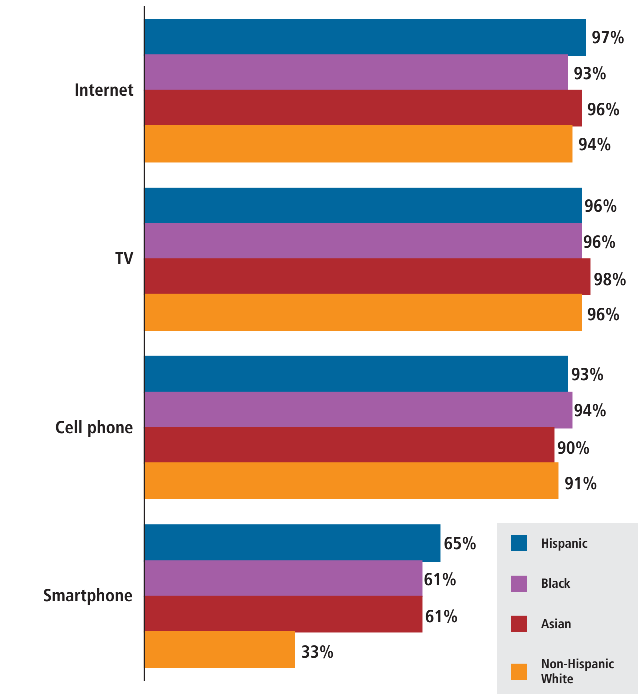
SOURCE: Nielsen

U.S. WOMEN'S BELIEFS ABOUT OPPORTUNITIES FOR THEMSELVES AND THEIR DAUGHTERS, BY RACE/ETHNICITY



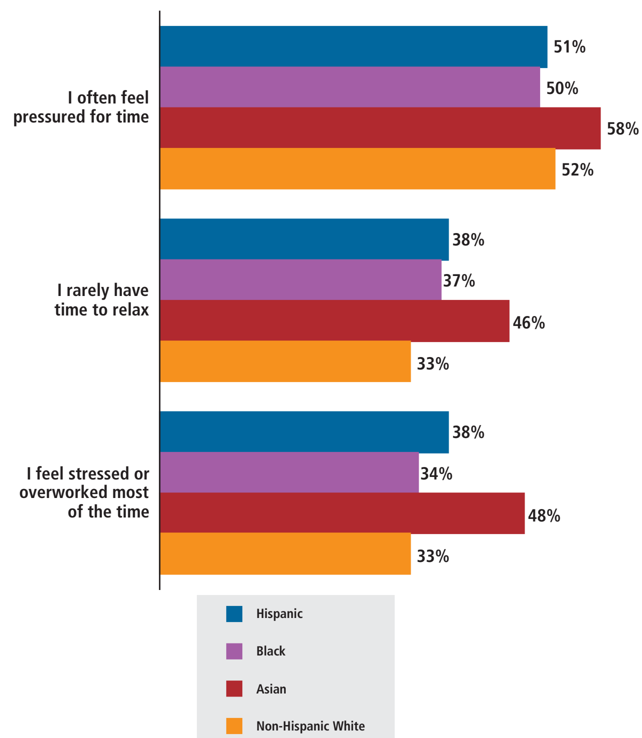
SOURCE: Nielsen

U.S. WOMEN'S OWNERSHIP OF ENTERTAINMENT AND COMMUNICATION TECHNOLOGIES, BY RACE/ETHNICITY



SOURCE: Nielsen

U.S. WOMEN'S EXPERIENCE OF STRESS, BY RACE/ETHNICITY



SOURCE: Nielsen

according to Nielsen. Black, Hispanic, and Asian women are also more likely than White non-Hispanic women to expect their own contributions to household income to increase in the next five years.

Asian American women are more likely than other U.S. women to experience high levels of stress on a regular basis.

Media Use And Ownership

Black, Hispanic, and Asian women are nearly twice as likely as non-Hispanic White women to own smartphones, though there are few differences in ownership of other media and communications technology.

Majorities of U.S. women in all racial/ethnic groups believe that computers, cell phones, and smartphones have made their lives better. Hispanic women (56%) are less likely than Asian (67%), White (67%), or Black (62%) women to feel this way about computers.

Asian women are most likely of all women to feel that smartphones are making their lives better — 72% say so, compared to 65% of Hispanic, 64% of Black, and 64% of White women. Women have less-positive views of the roles of television, radio, and videogames in their lives.

SOURCE: "Women of Tomorrow: U.S. Multicultural Insights," November 2011, Nielsen, 770 Broadway, New York, NY 10003; 646-654-5000; www.nielsen.com. Price: Available online at no charge.

Where Hispanics Find Product Information And Shop; Acculturation, Family Size Influence Spending

Hispanics' use of shopping channels largely mirrors that of the general population. Mass merchants are their top channel, and two in 10 (20%) have shopped at Wal-Mart or Target in the past three months, according to Scarborough Research.

Hispanics who primarily speak Spanish are less likely than those who primarily speak English or those who speak both with equal ease to shop in-store or online, and they're more likely to shop by phone or mail order, finds Google.

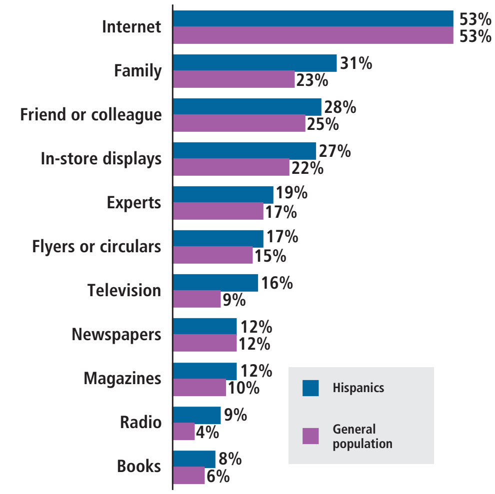
Looking at specific retail and product categories reveals some interesting differences between Hispanic and general population shopping behavior.

For example, Hispanics (38%) are less likely than adults overall (43%) to have bought home improvement products in the past six months, but equally likely to have bought home furnishings (30% of Hispanics and 32% of overall adults), according to Google.

Automotive

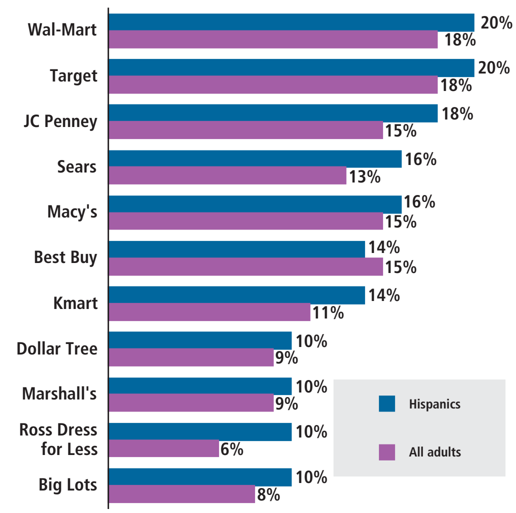
Hispanic adults are more likely than members of the general population to rely on friends and family as sources for information when shopping for automotive products. Hispanics are also more likely than adults overall to utilize in-store displays, television, and radio as sources of information for these products.

SOURCES OF INFORMATION WHEN SHOPPING FOR AUTOMOTIVE PRODUCTS, HISPANICS VS. GENERAL POPULATION



SOURCE: Google

RETAILERS SHOPPED BY HISPANICS IN PAST THREE MONTHS, 2010



SOURCE: Scarborough Research

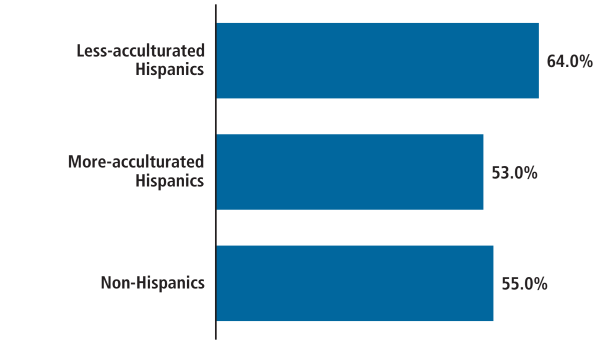
Bilingual Hispanics are more likely than either English-dominant or Spanish-dominant Hispanics to use the Internet (61% vs. 50% and 51%, respectively) and magazines (18% vs. 10% each) to gather information when shopping for automotive products.

Consumer Packaged Goods

When shopping for consumer packaged goods, Hispanics are more likely than members of the overall population to get product information from TV (28% vs. 22%), family members (27% vs. 23%), and magazines (19% vs. 11%).

Their top sources of information, however, are in-store displays (37% vs. 43%) and the Internet (31% vs. 32%).

HISPANICS WHO USUALLY BRING THEIR CHILDREN WITH THEM WHEN THEY GROCERY SHOP



SOURCES: SymphonyIRI and Synovate

Spanish-dominant Hispanics use a wider array of sources than English-dominant Hispanics when seeking information on consumer packaged goods, especially friends and family (40% of Spanish-dominant vs. 33% of English-dominant), Internet (38% vs. 27%), TV (32% vs. 20%) and magazines (24% vs. 12%).

English-dominant Hispanics are more likely than their Spanish-dominant counterparts to get product information from in-store displays (40% vs. 29%).

PRODUCTS HISPANICS ARE MORE LIKELY TO HAVE BOUGHT IN PAST YEAR, COMPARED TO ALL ADULTS, 2010

HOME FURNISHINGS	
Mattresses under $250	35% more likely
Mattresses $250-$499	28% more likely
Carpeting/floor coverings under $250	25% more likely
Draperies/window treatments under $250	19% more likely
ELECTRONICS	
Stereo equipment under $250	38% more likely
Stereo equipment $250-$499	16% more likely
Stereo equipment $500-$999	17% more likely
Stereo equipment $1,000-$2,999	18% more likely
Television under $250	45% more likely
Television $250-$499	19% more likely

SOURCE: Scarborough Research

Favorite Stores

Hispanics are more likely than adults overall to shop at off-price clothing chains, mass merchants, warehouse clubs, dollar stores, and some department stores, according to Scarborough Research — most notably JC Penney and Sears, both of which have extensive Hispanic-targeted marketing programs.

Reflecting their typically larger family sizes, Hispanics are more likely than members of the general population to have bought children's clothing (23% more likely) and infants' clothing (22% more likely) in the past year, and 80% more likely to have used baby food in the past 30 days.

Hispanic households are more likely than overall households to have a bought a variety of household furnishings in the past year, but only at comparatively low price points. They're willing to spend more on stereo and television equipment, and are 16% more likely than general market households to subscribe to satellite TV.

Less-acculturated Hispanics are more likely than more-acculturated Hispanics to bring their children grocery shopping, finds SymphonyIRI.

SOURCES: "Google U.S. Hispanics, December 2010," Google, Vicky Campetella, Global Communications and Public Affairs, 1600 Amphitheatre Pkwy., Mountain View, CA 94043; 650-253-0000; vcampetella@google.com; www.google.com. Price: This study is proprietary.

Scarborough Research, Allyson Mongrain, Director, Marketing & Communications, 770 Broadway, New York, NY 10003; 212-654-8426; amongrain@scarborough.com; www.scarborough.com. Price: Custom research provided to Research Alert. Contact for price information.

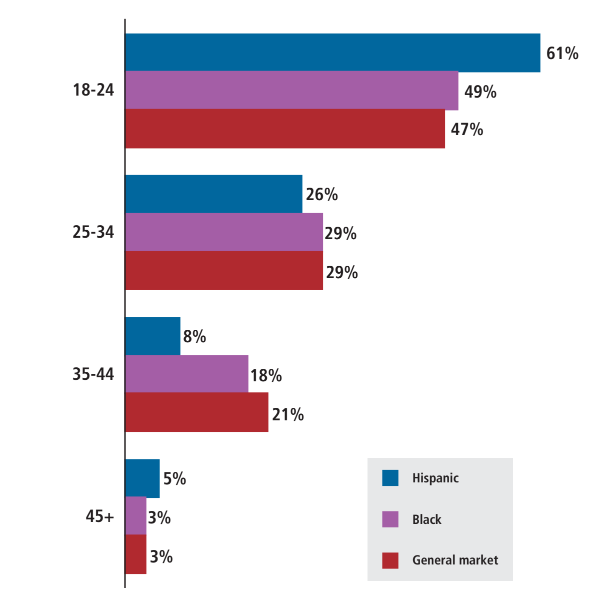
"HispanicLink," SymphonyIRI and Synovate, Staci Covkin, Consumer & Shopper Insights, SymphonyIRI, 150 N. Clinton St., Chicago, IL 60661; 973-449-3457; staci.covkin@symphonyiri.com; www.symphonyiri.com. Price: Contact for information.

Hispanics Are Avid Moviegoers, Mobile Users

Hispanics go to the movies more frequently than non-Hispanics, according to mobile marketing agency Briabe Mobile and mobile social network MocoSpace; nearly a quarter (24%) see three or more movies per month in the theater, compared with 15% of overall adults and 19% of Blacks.

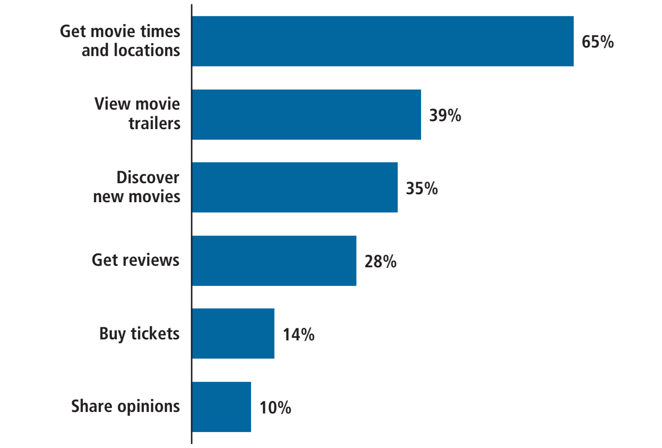
The difference is primarily driven by Hispanics ages 18-24, who are 30% more likely than their general market coun-

AMERICANS WHO SEE THREE OR MORE MOVIES IN THEATERS PER MONTH, BY AGE AND RACE/ETHNICITY



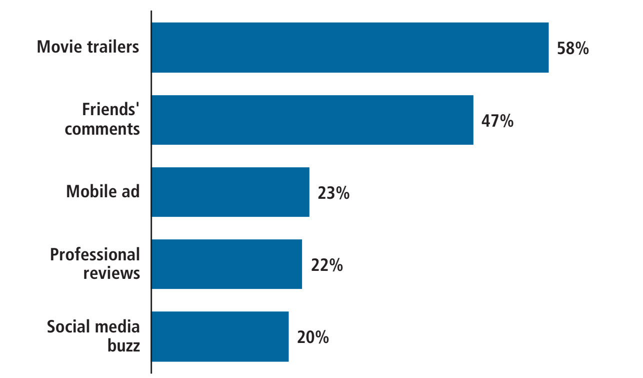
SOURCE: Briabe Mobile/MocoSpace

MOVIE-RELATED ACTIVITIES HISPANICS DO ON THEIR MOBILE PHONES



SOURCE: Briabe Mobile/MocoSpace

MOST INFLUENTIAL INFORMATION OBTAINED VIA MOBILE PHONE FOR CHOOSING MOVIES, ACCORDING TO HISPANICS



SOURCE: Briabe Mobile/MocoSpace

terparts to see three or more movies per month (calculations by Research Alert). Hispanics ages 35-44 are less than half as likely as overall adults that age to see movies frequently.

More than seven in 10 Hispanics (72%) use their mobile phones to make movie plans; looking up movie times and theater locations is the most common activity. More than half (55%) use their phones within four hours of seeing a movie; 18% use them within four to eight hours.

Among Hispanics ages 18-24, 60% use their phones within four hours of showtime. Hispanic moviegoers ages 45 and older are more likely than those ages 18-24 to use their phones to plan for movies a day or more ahead of time (17% vs. 11%).

When using their mobiles to decide which movie to see, trailers and friends' comments are the most important factors in their decisions.

Blacks (41%) and Hispanics (40%) are more likely than general market consumers (31%) to be influenced in their movie choices by ads on their mobile phones. Mobile search, mobile banner ads, and ads in mobile apps have the strongest influence on Hispanics' movie choices. Hispanics ages 18-24 are more likely than those 25 and older to be influenced by mobile app ads.

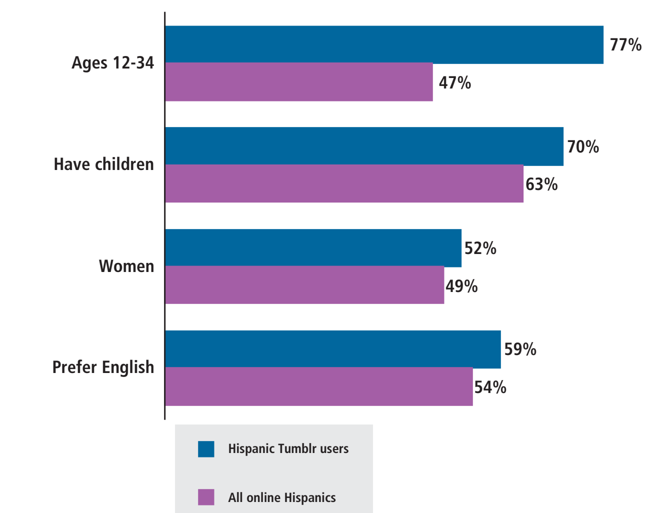
More than half of Hispanics (55%) who participate in mobile social networks discuss movies on the networks. Hispanics ages 45 and older (58%) are just as likely as those ages 18-24 to talk about movies on mobile social networks.

SOURCE: "The Mobile Consumer: Hispanics, Movies, and Mobile," July 2011, Briabe Mobile and MocoSpace. Briabe Mobile, James Briggs, CEO, 634A Venice Blvd., Venice, CA 90291; 310-694-3283; info@broabemobile.com; www.birabemobile.com. MocoSpace, Justin Siegel, Cofounder/CEO, 186 South St., 2nd Fl., Boston, MA 02111; 617-542-1614; mktg@corp.mocospace.com; www.mocospace.com

Tumblr Social Site Is Attracting Increasing Numbers Of Hispanics

The number of Hispanic monthly visitors to photo blogging site Tumblr grew 312% between 2010 and 2011, compared to 218% growth in overall visitors, according to comScore data cited by Captura Group.

SELECTED CHARACTERISTICS OF HISPANIC USERS OF TUMBLR, VS. ONLINE HISPANICS OVERALL



SOURCE: Captura Group

NUMBER OF U.S. HISPANIC VISITORS TO SELECTED WEBSITES, PER MONTH

Univision.com	3,500,000
MSN Latino	1,500,000
Tumblr	1,500,000
Terra.com	740,000
AOL Latino	650,000

SOURCE: Captura Group

Hispanics made up 11% of the site's total visitors in July 2011 — a total of 1.5 million visited that month. Hispanics who use Tumblr are more likely than overall U.S. Hispanics to be ages 12-34, Female, parents, and to prefer speaking English, according to Captura Group. [Note: The site only recently added Spanish-language functionality.]

SOURCE: Captura Group, Lee Vann, Founder, 3714 Fourth Ave., San Diego, CA 92103; 619-681-1856; lee@capturagroup.com; www.capturagroup.com. Price: Contact for information.

Hispanics Are Worried About Losing Jobs

More than a third (37%) of U.S. Hispanics describe themselves as "very" worried that they or someone in their household will become unemployed, according to a poll of Hispanic registered voters in the U.S. by Latino Decisions and Impremedia. Foreign-born Hispanics (44%) are more likely than those born in the U.S. (31%) to be concerned.

More than half (51%) say they've been worried many times that they won't have enough money to pay all of their bills in a given month (no significant difference between foreign- and U.S.-born).

Hispanics cite immigration (47%), the economy (44%), job creation (21%), and education (20%) as the issues facing the Latino community that they consider most important for the President and Congress to address.

SOURCE: Latino Decisions, Dr. Gary Segura, c/o Pacific Market Research, 15 South Grady Way, #620, Renton, WA 98057; 877-271-2300; info@latinodecisions.com; www.latinodecisions.com. Price: Poll results are available on website, free of charge.

College Enrollment Among Hispanics Jumps

Between October 2009 and October 2010, the number of 18-24-year-old Hispanics enrolled in college increased by 24%, according to the Pew Hispanic Center. Enrollment among 18-24-year-old Blacks grew 5% and that among Asians grew 6%, while enrollment among non-Hispanic Whites decreased 4% during this time.

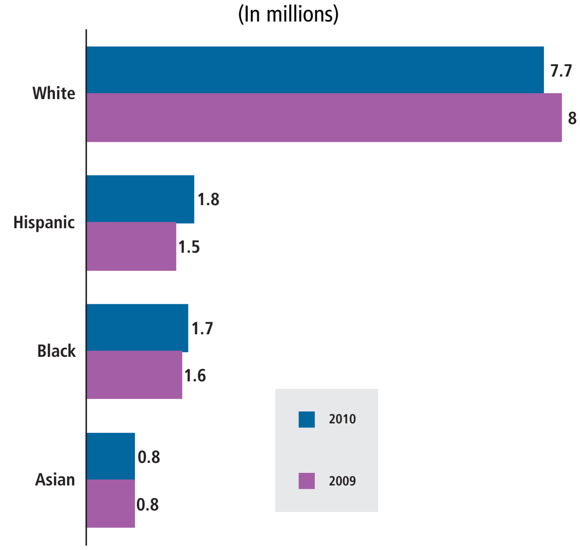
Non-Hispanic Whites made up 63% of all 18-24-year-old college students in 2010, the lowest proportion since the Census Bureau began tracking these statistics in 1993.

Hispanics made up 15% of all 18-24-year-olds enrolled in college in 2010, although Black students outnumbered Hispanic students on campuses by a small margin.

Part of the increase is attributable to 7% increase in the 18-24-year-old Hispanic population, but the majority is due to increases in high school completion and interest in/eligibility for higher education. More than seven in 10 Hispanics (73%) had completed high school in 2010, the highest level ever recorded. More than four in 10 18-24-year-old Hispanics (44%) with high school diplomas were enrolled in college in October 2010, up from 39% in 2009.

High school completion and college enrollment among Black 18-24-year-olds also reached record levels in 2010.

18-24-YEAR-OLDS ENROLLED IN COLLEGE, BY RACE/ETHNICITY, OCTOBER 2010 VS. OCTOBER 2009
(In millions)



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

More than eight in 10 18-24-year-old Blacks (83%) had completed high school in October 2010; 38% of all Blacks in this age group were enrolled in college, up from 37% in 2009. Among those with high school diplomas, 46% were enrolled in college (on par with 2009).

Hispanics are more likely than other college students to be enrolled in community colleges; just over half of 18-24-year-old Hispanic college students (54%) attend four-year-colleges, compared to 63% of Black students, 73% of White students, and 78% of Asian students.

One factor contributing to increases in college enrollment is a continued lack of jobs available to young adults. Only 60% of 20-24-year-olds were employed at the end of 2010. For many young adults, pursuing a college degree not only represents a way to improve their job prospects, but also offers a temporary alternative to unsuccessful job-seeking.

SOURCE: "Hispanic College Enrollment Spikes, Narrowing Gaps With Other Groups," August 2011, Pew Hispanic Center, Richard Fry, Senior Research Associate, 1615 L St., NW, #700, Washington, DC 20036; 202-419-3600; info@pewhispanic.org; www.pewhispanic.org. Price: Available online at no charge.

Asians Are Biggest Spenders On Dining Out

Asian families spend more on dining out than families of other racial/ethnic groups, according to Technomic and C3. Almost half (48%) of Asian families' food spending is devoted to food eaten away from home, compared with 41% of spending by Caucasians, 38% by Hispanics, and 36% by African Americans.

Moms consider dining at full-service restaurants to be the most enjoyable way to eat out, and they assess restaurants based on how comfortable their families will be there and whether the restaurant offers food their kids will eat.

Among Asians, moms of Filipino origin are most likely to take their families frequently to fast-food restaurants (63% are heavy users); moms from India (32%) and Japan (29%) favor fast-casual restaurants. Among Hispanics, 54% of moms of Mexican origin are frequent customers of fast-food restaurants, while 20% of moms of Central American origin are frequent customers of fast-casual restaurants.

Although families make the majority of out-of-home eating decisions jointly, moms are more likely than other family members to say they're the sole decision-makers.

The vast majority of moms say they're spending cautiously (96%), and 17% say they're making long-term changes in their spending habits because of the recession. Asian moms are least likely to feel their families' lives are being affected by the recession; 41% are currently "living comfortably."

SOURCE: "Today's Mom: Understanding the Foodservice Attitudes and Behaviors of Major Ethnic Groups," Technomic and C3. Technomic, Patrick Noone, VP, 300 South Riverside Plz., #1200, Chicago, IL 60606; 312-506-3852; pnoone@technomic.com; www.technomic.com. Price: Contact for information.

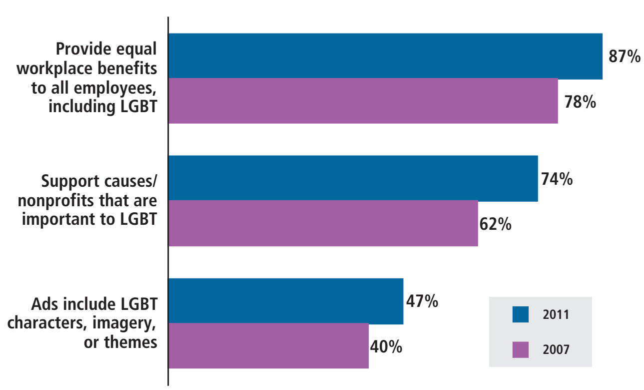
Gay/Lesbian Consumers Care More About Corporate Actions Than Ads

Lesbian, gay, bisexual, and transgendered (LGBT) adults are increasingly influenced in their purchase decisions by how companies treat their employees and which causes they support, according to Witeck-Combs Communications and Harris Interactive.

Inclusion of gay/lesbian characters or storylines in advertising is also persuasive but has less of an impact than what the company does as a corporate citizen and employer.

Almost a quarter of LGBT adults (23%) have switched brands in the past year because they found a product made by a competitor that supports LGBT causes. Seven in 10 (71%; up from 66% in 2007) say they'll remain loyal to a brand that's gay-friendly or supports LGBT causes even if less supportive competitors offer lower prices or greater convenience.

FACTORS THAT MAKES LGBT ADULTS MORE LIKELY TO CONSIDER BUYING BRAND



SOURCES: Witeck-Combs and Harris Interactive

SOURCES: Witeck-Combs Communications and Harris Interactive. Witeck-Combs Communications, Bob Witeck, 2120 L ST., NW, #850, Washington, DC 20037; 202-887-0500, x19; bwiteck@witeckcombs.com; www.witeckcombs.com. Price: Contact for information.

Harris Interactive, 161 Sixth Ave., New York, NY 10013; 585-272-8400; info@harrisinteractive.com; www.harrisinteractive.com

Americans Appreciate Cultural Diversity In Society And In Stores

Eight in 10 Americans (80%) believe that one of the best aspects of the U.S. is its cultural diversity, according to The Futures Company and Cheskin Added Value. Many Americans have members of another race/ethnicity as part of their extended families, including 47% of Blacks, 32% of non-Hispanic Whites, and 30% of Hispanics.

Most — 82% of Blacks, 77% of Hispanics, and 69% of non-Hispanic Whites — have "learned many new things" from a member of a different race/ethnicity. More than a third of Hispanics (37%), 27% of Blacks, and 22% of non-Hispanic Whites view themselves more as citizens of the world than as citizens of the U.S.

Diversity affects more than Americans' world views — it has an impact on the products they buy. Most appreciate the growing influence of other cultures on the products they use, including 83% of Blacks, 77% of Hispanics, and 64% of non-Hispanic Whites.

SOURCE: "Influence of Ethnic Identity on Consumer Behavior," Cheskin Added Value, Stephen Palacios, EVP, 11 Madison Ave., 12th Fl., New York, NY 10010; 917-860-0517; spalacios@cheskin.com; www.cheskin.com. Price: Call for information.

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.

Hispanics Feel Respected As Consumers

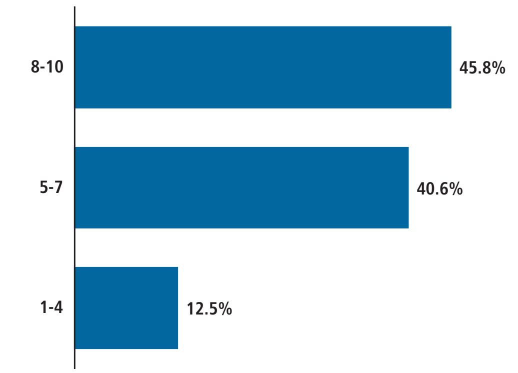
Most U.S. Hispanics believe that as a group they have a high degree of importance to U.S. companies and brands — 59% feel they're very important, and 34% say they're important, according to a Newlink Research survey for management consulting firm Garcia Trujillo. The majority feel that U.S. companies respect Hispanics as consumers; 46% believe they show Hispanics a high level of respect (8-10 on a 10-point scale).

When it comes to how they're treated as employees, however, Hispanics hold less-positive views of U.S. companies. Four in 10 (42%) believe Hispanics have few opportunities to climb the management ladder, and 23% think they face serious obstacles to advancement and training.

Hispanics who perceive a lack of advancement opportunities cite language (60%) and lack of college/university degrees (22%) as their chief obstacles. They welcome oppor-

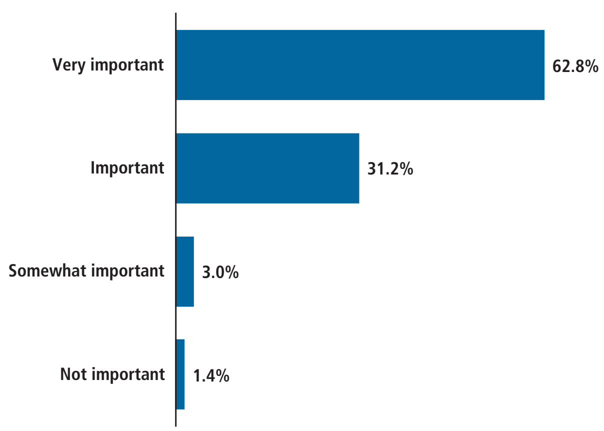
HISPANICS' PERCEPTIONS OF HOW MUCH U.S. COMPANIES RESPECT THEM AS CONSUMERS

(Based on 10-point scale where 10 = highest level of respect)



SOURCE: Garcia Trujillo

IMPORTANCE OF SPANISH-SPEAKING SPOKESPEOPLE IN U.S. COMPANIES' ADS AND INFORMATION, ACCORDING TO HISPANICS



SOURCE: Garcia Trujillo

tunities to improve their skills at work. Seven in 10 Hispanics (72%) consider on-the-job training or professional development courses to be very important. In general, Hispanics rate U.S. companies favorably in terms of their level of commitment to their Hispanic employees: 45% rank companies 8-10 on a 10-point scale.

They'd like to see companies become more involved in social, political, and economic issues of concern to Hispanic communities, and they want companies to hire more Hispanics, especially in managerial and executive-level positions. Two thirds (67%) say they'd be more inclined to buy products and services from companies that demonstrated real commitment to the U.S. Hispanic community.

Hispanics would also like to see more U.S. companies provide Spanish-language versions of their websites and create advertisements in Spanish as well as English. Nine in 10 (91%) consider it very important (62%) or important (29%) that U.S. companies offer Spanish-language websites. Both English-dominant and Spanish-dominant Hispanics would like to see more ads and websites available in Spanish.

Most likely this reflects the significant amount of language crossover in daily use, even among those who favor one language or the other. About four in 10 English-dominant Hispanics use some Spanish-language Internet on a daily basis, according to Nielsen data cited.

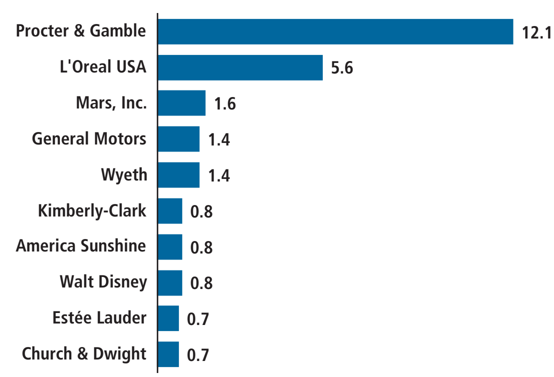
Similarly, one in three English-dominant Hispanics spend an hour or more per day watching Spanish-language television, and about the same proportion of Spanish-dominant Hispanics spend an hour or more per day watching English-language television, according to Nielsen data cited.

SOURCE: "Garcia Trujillo Hispanic Consumer Insight Survey: Latinos' Emotional Connection With Companies and Brands, February 2011," Garcia Trujillo, Charles Garcia, CEO, 1221 Brickell Ave., #1200, Miami, FL 33131; 305-390-0532; angela@garciatrujillo.com; www.garciatrujillo.com. Price: This study is available for download at no charge.

Ad Spending In Hispanic Magazines Up 30% In First Half Of 2011

U.S. COMPANIES SPENDING MOST ON ADS IN HISPANIC MAGAZINES, JANUARY-APRIL 2011

(in $ millions)



SOURCE: Media Economics Group

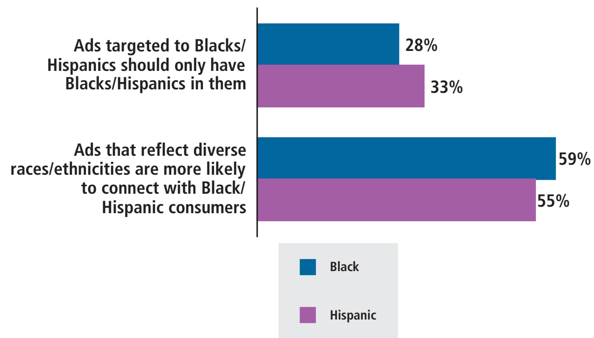
SOURCE: "Hispanic Magazine Monitor," May 2011, Media Economics Group, Carlos Pelay, 7427 Matthews-Mint Hill Rd., #105-364, Charlotte, NC 28227; 704-841-2030; info@media-economics.com; www.media-economics.com

Blacks, Hispanics Want Culturally Relevant Ads

Ads that feature families — especially multiple generations of family — carry more weight with Black and Hispanic consumers than with non-Hispanic White consumers, according to Time Inc./Motivo research presented at the Advertising Research Foundation Convention, March 2011.

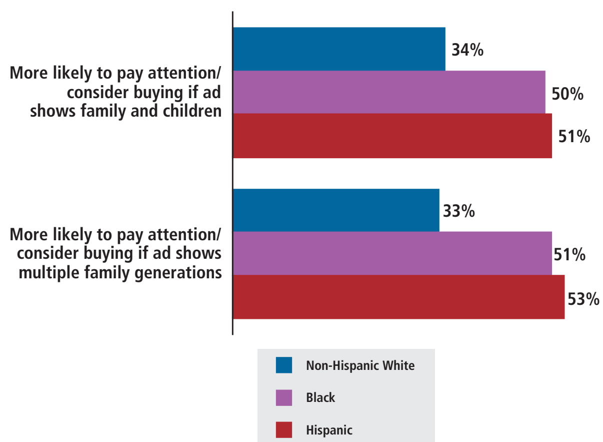
Although Blacks and Hispanics respond favorably to ads that are clearly targeted to their racial/ethnic groups (by virtue of being placed in targeted media, cast with Black or

BLACK AND HISPANIC CONSUMERS' PREFERENCES FOR DIVERSITY IN CASTING OF ADS



SOURCES: Time Inc. and Motivo Insights

ATTITUDES ABOUT SEEING FAMILIES IN ADVERTISING, BY RACE/ETHNICITY



SOURCES: Time Inc. and Motivo Insights

Hispanic actors, scripted in Spanish, etc.), they are even more receptive to seeing ads with diverse casts placed in mainstream media. Nearly six in 10 Hispanics (58%) and 54% of Blacks say that when they see or hear an ad targeted to Hispanic or Black consumers in non-targeted media, it stands out, and it makes them feel that the company values them as consumers.

Similarly, while an ad produced in Spanish serves as a clear cue that the brand wants to speak to Hispanics, other aspects of cultural relevance are just as important. Fewer than half of Hispanics — even those who are relatively unacculturated — believe ads targeted to Latinos should always be in Spanish.

The key is to reflect Black and Hispanic consumers' cultural values — family gatherings, religious and cultural traditions, pride in being a bicultural American — as well as portraying diverse faces. When communicating with Hispanics who consider themselves bicultural, for example, it's important to know that both language and behavior shift with the context of the moment — place, people, and what's going on or being discussed.

SOURCE: "Marketing to the Multicultural Consumer: New Insights on Culture, Context, and Brands," Betsy Frank, Chief Research and Insights Officer, Time Inc., 1271 Ave. of the Americas, New York, NY 10020; 212-522-1212; research@timeinc.com; www.timeinc.com. Gonzalo Perez, Owner and Principal, Motivo Insights, 1521 Alton Rd., #400, Miami Beach, FL 33139; 646-662-5524; gonzalo@motivoinsights.com; www.motivoinsights.com. Price: Contact for information.

Majority Of Americans Think U.S. Has Made Progress In Civil Rights

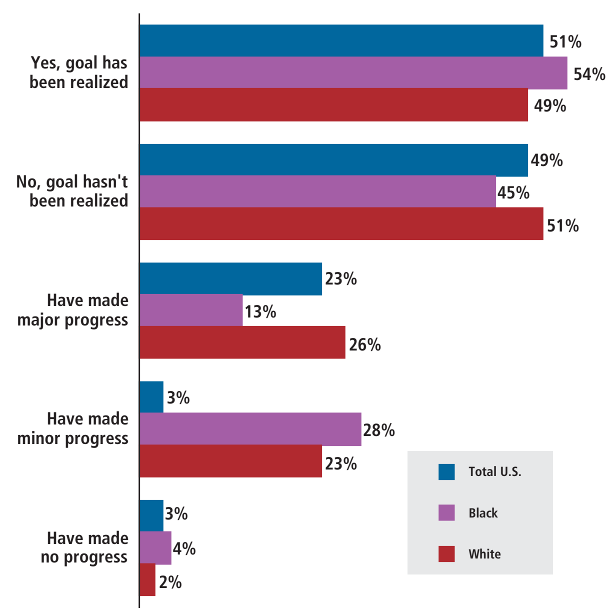
Blacks are slightly more optimistic than Whites about whether Martin Luther King, Jr.'s vision of racial equality has become a reality in the U.S., according to a *USA Today*/Gallup poll. Almost three quarters of Americans (74%) think major progress has been made toward that goal, or that it's been achieved; only 3% feel that no progress has been made. Almost nine in 10 Americans (89%) think civil rights for Blacks in the U.S. have improved during their own lifetimes.

Nine in 10 Americans (99% of Blacks and 89% of Whites) support the establishment of a national memorial to Dr. King's life and work, and seven in 10 (95% of Blacks and 65%) of Whites hold highly favorable opinions of Dr. King (four or five on a five-point scale).

By comparison, only 12% of Americans held highly favorable views of Dr. King when this question was asked in 1966.

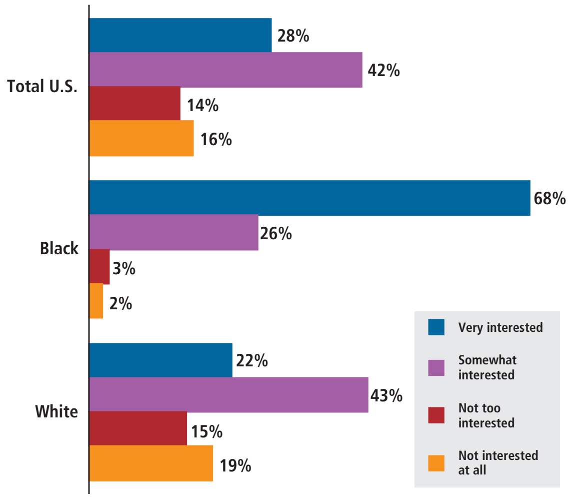
Blacks are more likely than Whites to express interest in visiting the new King monument in Washington, D.C., but 70% of Americans overall are either very or somewhat interested.

AMERICANS' VIEWS ON WHETHER MARTIN LUTHER KING'S GOAL OF RACIAL EQUALITY HAS BEEN REALIZED, BY RACE



SOURCE: *USA Today*/Gallup

AMERICANS' LEVEL OF INTEREST IN VISITING THE MARTIN LUTHER KING, JR. NATIONAL MEMORIAL, BY RACE



SOURCE: *USA Today*/Gallup

SOURCE: *USA Today*/Gallup poll, August 2011, Gallup, Jeffrey Jones, Editor, 901 F St., NW, Washington, DC 20004; 202-715-3030; www.gallup.com. Price: Available online at no charge.

factoids

- Four in 10 single African American women (41%) look for **dates** at church, compared to 24% of African American men who look there. *(*Ebony *magazine; phone: 312-322-9429)*
- More than half of unmarried African American women (52%) in relationships want to **marry** their current partners; 42% of African American men want to marry theirs. *(*Ebony *magazine; phone: 312-322-9200)*
- Hispanics (48%) are least likely to eat the recommended daily servings of **fruits and vegetables**; Blacks are most likely (58%). *(Gallup; phone: 202-715-3030)*
- Some 7.2 million U.S. **Hispanics** used Gmail in July 2011. *(Captura Group; phone: 619-681-1856)*
- Hispanics who prefer speaking Spanish are more likely than members of the general public to own or plan to **buy tablets and/or e-Readers**. *(Center for Hispanic Marketing Communication, Florida State University; phone: 850-644 8766)*
- More than four in 10 Hispanics (45%) who live in Los Angeles **speak only English** or are bilingual but prefer English. *(Geoscape; phone: 888-211-9353; info@geoscape.com)*
- More than seven in 10 Asian American households (72%) have **broadband Internet access**. *(Horowitz Associates Market Research & Consulting; phone: 914-834-5999)*
- More than seven in 10 U.S. Hispanics (74%) visit **Facebook** monthly. *(Captura Group; phone: 619-681-1856)*
- 61% of Black Americans say they've experienced **racism** at work. *(*Ebony*; phone: 212-397-4500)*

entertainment & media use

As the options for consuming media and entertainment shift and multiply, the lines between the two are blurring. Although more Americans consider television their primary entertainment medium, computers are gaining rapidly, especially among men under 35. The majority of Internet users watch online video, which can be viewed on an increasing array of devices — computers, tablets, smartphones, gaming consoles, Internet-connected TVs. Entertainment is increasingly interactive and/or participatory; the most widely viewed genre of online video is consumer-created content.

Social media and reality TV have softened (or eliminated) the barriers between celebrities and "ordinary" people, and high-quality videogames enable players to feel as if they're participating in their own adventure films.

There's also an increasing connection between communication and entertainment. Not only are the devices used often the same, but mobile and social media make it easy to share links and files, as well as to discuss whatever we're watching, playing, or listening to.

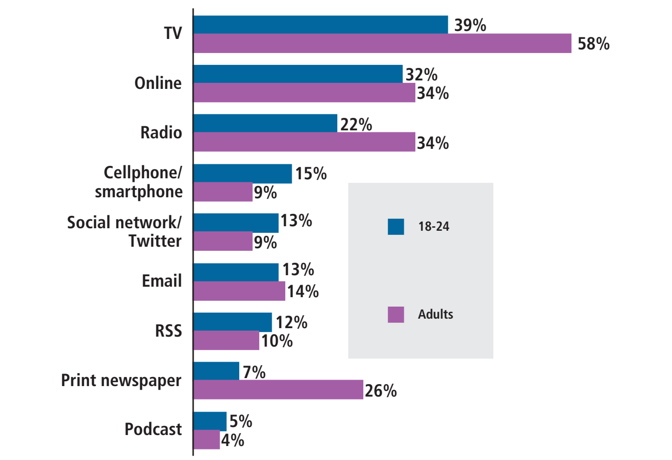
Cannibalization or Enhancement?

It's unclear as yet whether new media are shifting consumers' attention away from traditional forms. The short answer is that having multiple options for media and entertainment allows consumers to be more connected to their chosen forms of entertainment at all times. U.S. households' cable/satellite TV subscriptions have held steady despite the growth of online video, and the vast majority of subscribers say they're unlikely to cancel. At the same time, however, consumers' attention is finite — and increasingly split among several simultaneous activities.

Three In 10 Young Adults Avoid All News

Three in 10 18-24-year-olds (31%) consumed no news yesterday, compared to 17% of older adults, according to Pew's People & The Press report. Those who did consume news primarily received the information via TV (39%) or online (32%). Only 7% received their news from a print newspaper.

WHERE YOUNG ADULTS GET THEIR NEWS, 2010



SOURCE: Pew Research Center

SOURCE: People & The Press, Scott Keeter, Director Survey Research, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4350; www.peoplepress.org.

Magazine Readers Use Both Print And Digital

More than 184 million U.S. adults read magazines in print or electronic form each month, according to Affinity. The average magazine consumer reads 8.1 different magazines.

More than half of those who read print magazines (51%) also read at least some digital magazine content. Nine in 10 readers of digital magazines also read them in print. Nearly half of all magazine readers — 89 million — read both print and digital formats.

More than half of those who read digital magazines (51%) say they enjoy using features not offered by print versions, such as clicking on links to get more information. More than a third (36%) have clicked on advertisers' links.

PROFILE OF PRINT MAGAZINE READERS

Women	54%
Men	46%
Median age	46.4
College graduate	32%
Median HH income	$63,465

SOURCE: Affinity

PROFILE OF DIGITAL MAGAZINE READERS

Women	51%
Men	49%
Median age	39.8
College graduate	38%
Median HH income	$70,429

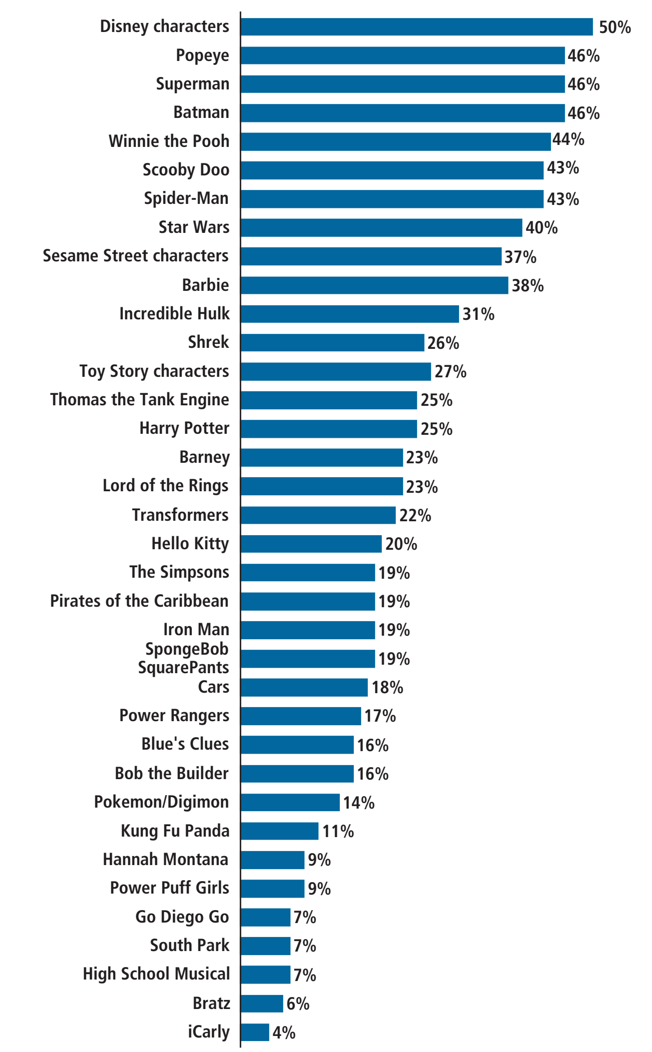
SOURCE: Affinity

SOURCE: Affinity, Tom Robinson, Managing Director, 315 Madison Ave., #801, New York, NY 10017; 212-922-9582, x201; tom@affinityresearch.net; www.affinityresearch.net. Price: Contact for information.

Superheroes Maintain Equity, Tween Girl Stars Do Not, Say Adults

Superman, Batman, and Spider-Man are the top kid-targeted characters that adults feel are classic and will never lose their relevance, according to the NPD Group. Nick-

CHILDREN'S CHARACTERS THAT ADULTS CONSIDER CLASSIC AND SAY WILL NEVER GO OUT OF FASHION



SOURCE: NPD Group

elodeon's iCarly, Bratz, and High School Musical are most likely to go out of fashion.

Interestingly, adults feel Popeye is more long-lasting than Barbie, Incredible Hulk has more equity than Iron Man, and Shrek has more staying power than SpongeBob Squarepants.

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.

Casual Piracy Is Common In U.S., But 'Large-Scale' Activity Is Rare

Nearly half of U.S. adults (46%) have purchased, copied, or downloaded unauthorized music, TV shows, or movies, according to Columbia University's American Assembly. In addition, 56% of Americans say it is "reasonable" to share music files with friends; for movie and TV files, the proportion is nearly the same (54%).

Amidst such popular acceptance of piracy, however, a slight majority of U.S. adults support new government measures to enforce intellectual property rights. Some 58% of Internet users support measures for Internet service providers to "block" infringing material. The supporting majority predictably fades when the measures are characterized as censorship, blocking of legal content, or surveillance of Internet use.

"Large-scale" digital piracy is relatively rare, according to the American Assembly: 2% of adults have more than 1,000 unauthorized music files in their collections, while 1% of adults have more than 100 unauthorized digital movie files.

The American Assembly's "Copy Culture" survey was conducted in August 2011 by Princeton Survey Research Associates International, with results based on telephone interviews with some 2,300 adults living in the continental United States.

SOURCE: The American Assembly, Joe Karaganis, VP, 475 Riverside Dr., #456, New York, NY 10115; 212-870-3500; jk2991@columbia.edu; www.americanassembly.org.

What Entertainment Consumers Want In Cloud-Based Services

While it's early days for consumer awareness of cloud-based entertainment services, fewer than 30% of U.S. broadband households currently view "digital lockers" as an attractive alternative for music or video, according to a new study by Parks Associates.

The research firm points to device interoperability and fragmentation as among the market's major inhibitors. Industry efforts such as the Digital Entertainment Content Ecosystem's UltraViolet initiative and Disney's Studio All Access aim to overcome these barriers.

The benefits of cloud services are popular with consumers, indicating significant market potential. For example, more than 50% of U.S. consumers consider multi-room access to music and video content and guaranteed replacement of lost or damaged media to be equally important features of a digital locker.

A separate study by TDG Research reveals one way in which a surprising number of broadband households have accessed digital video in their living rooms: PC-to-TV connections.

One third of adult broadband users have used some form of PC-to-TV connection at least once a year, according to TDG. Nearly 17% of this group claim to use a PC-to-TV connection on a daily basis.

SOURCES: Parks Associates, Tricia Parks, CEO, 5310 Harvest Hill Rd., #235, Dallas, TX 75230; 972-996-0207; tricia@parksassociates.com; www.parksassociates.com.

TDG Research, Greg Stockard, Research Services Manager, 9555 Lebanon Rd., #701, Frisco, TX 75035; 469-287-8040; gs@tdgresearch.com; www.tdgresearch.com.

TV Marketers Face A Tougher Time Than Their Theatrical Peers Selling Consumers On 3D

3D may have juiced theatrical admissions in 2010, providing studios with a relatively straightforward marketing hook. But moviegoers aren't bringing their enthusiasm for 3D home.

Marketers of new 3D televisions and related programming would seem to have their work cut out for them in 2011, with most consumers in the U.S. either nonplussed by the technology, intimidated by the hardware's price, or simply satisfied with the high-definition TV they just bought, according to two new reports.

New Programming May Raise Purchase Intent

U.S. consumer interest in 3D TV trails every other region of the world, according to Nielsen. While two percent of North American respondents to an online survey claim to already own a 3D television, only 6% say they probably or definitely will purchase a 3D set in the next 12 months. More than three quarters (76%), meanwhile, say they probably or definitely will not.

Nielsen's Frank Stagliano says that the recent "format war" between Blu-ray and HD DVD products, along with competing plasma and LCD display technologies, have "trained consumers to wait" on purchasing new consumer electronics "until widespread adoption is more likely." Stagliano adds that some consumers are also deterred by the perceived usability of a 3D set and requisite glasses, fearing that 3D technology may inhibit TV as a relaxing medium.

Yet the 24-hour 3D TV network launching in early 2011 from Discovery, Imax, and Sony may work to change consumer impressions of the technology, the analyst says.

A separate study conducted by Nielsen, along with the Cable & Telecommunications Association for Marketers (CTAM) and CBS Vision, reveals a range of TV viewer opinions of home 3D programming.

The study involved 12 groups and families watching 30 minutes of 3D TV content in a traditional living room space at Sony's 3D Experience Media Lab in the MGM TV City facility in Las Vegas. The study also incorporates impressions of 425 nationwide participants, viewing the same material in a theater-style environment. (The content included clips from a range of genres — nature, sports, comedy, a music concert, movies, and videogames.)

While 60% of participants said that the 3D material was "better" than their current 2DTV viewing, fewer than half (48%) found the 3D content more engaging. Among types of programming viewers would most like to see in 3D, movies (54%) trail sports (64%) and nature features (62%).

Remarking on the study results, CBS Vision's David Poltrack notes that creators of top-rated TV shows, such as dramas, have yet to conceive of their programs in the stereoscopic medium. Ultimately, however, Poltrack sees the industry embracing the format, and consumers following suit: "People are going to watch special episodes of their favorite programs in 3D."

High HDTV Ownership As Backdrop

A survey of the market adoption of high-definition TVs sheds light on how long a battle 3D home entertainment marketers may have ahead of them.

Some 61% of households in the U.S. have at least one HDTV set, and about 26% have multiple HDTVs, according to Leichtman Research Group (LRG). Comparatively, in 2005, 12% of U.S. households had at least one HDTV, and only 1% had more than one.

While less than 1% of all U.S. households currently have an HDTV set that is 3D-capable, nearly 80% of adults in the U.S. have heard of 3D TV. Yet among that group, just 8% say they are very interested in purchasing a 3D set.

Price seems to be a chief factor. Six in 10 HDTV owners (60%) report spending under $1,000 on their HDTV set — compared to 48% last year, and 34% two years ago. An EML survey of prices of 45 3D TVs available at Best Buy — among retailers, one of 3D's most ardent supporters — turned up just one set selling for under $1,000 three days before Christmas.

3D technology also arrives at a time when most households consider themselves "set" with new television purchases. Some 21% of all households purchased a new TV set in the past 12 months, and 18% of all households plan to purchase a new TV set in the next 12 months, according to LRG.

Notably, the mean annual household income of those very interested in getting a 3D TV is 18% below the mean of the LRG survey sample.

SOURCES: CBS Vision, David Poltrack, Chief Research Officer/President, 51 W. 52nd St., #2486, New York, NY 10019; 212-975-3883; dfpoltrack@cbs.com; www.cbs.com.

CTAM, Anne Cowan, SVP Communications & Marketing, 201 N. Union St., #440, Alexandria, VA 22314; 703-837-6577; anne@ctam.com; www.ctam.com.

Leichtman Research Group, Bruce Leichtman, President, 3 Ellison Ln., Durham, NH 03824; 603-397-5400; info@leichtmanresearch.com; www.leichtmanresearch.com.

Nielsen Entertainment, Frank Stagliano, EVP/GM, 1 N. Lexington Ave., 14th Fl., White Plains, NY 10601; 914-328-9100; www.nielsen.com.

Awareness Of 3D TVs Up; Aversions Remain

Consumer awareness of 3D LCD televisions has increased from 28% in September 2010 to 36% in February 2011, while awareness of 3D plasma TVs rose from 21% to 32% over the same period, estimates NPD. However, some consumers harbor an aversion to wearing 3D glasses at home. The prices of 3D TV sets also remain a market inhibitor, despite reductions over the last year. NPD reports the average price of a 3D LCD set to be $1,705 as of February; the average 3D plasma set, meanwhile, retails for $1,214.

SOURCE: NPD Group, Ross Rubin, Director Industry Analysis, 250 Park Ave. S., 7th Fl., New York, NY 10003; 212-515-8777; ross_rubin@npd.com; www.npd.com.

3D TV Owners Are Watching, With Glasses

Six in 10 3D television owners (60%) actually watch 3D programming on their displays, according to a survey of some 3,000 3D TV owners conducted by SmithGeiger for The Digital Entertainment Group (DEG).

Among other facets of the emerging market for 3D home entertainment:

- Feature films on Blu-ray 3D discs are the most popular type of content among 3D television viewers (78%).
- Nearly three quarters of 3D TV owners (74%) own two or more pairs of stereoscopic glasses.
- Four in 10 (40%) report receiving 3D programs through a cable or satellite channel.
- 28% of 3D TV owners also own a PlayStation 3 videogame console; 78% of these owners have upgraded their PS3 to watch 3D Blu-ray discs, while 76% have enabled 3D videogame play on their systems.

SOURCE: DEG: The Digital Entertainment Group, Lyndsey Schaefer, Associate Director, 10635 Santa Monica Blvd., #160, Los Angeles, CA 90025; 424-248-3811; schaefer@degonline.org; www.degonline.org.

Discs Still Dominate Movie Consumption

U.S. consumers still watch more movies on DVD and Blu-ray Disc than via all digital-video options combined, according to an online survey of nearly 10,000 consumers by the NPD Group.

Over the past three months (January-March, 2011), 77% of consumers reported watching a movie on a DVD or Blu-ray disc; the percentage remains unchanged from the same period in 2010. Those who viewed movies from physical discs reported watching an average of four hours per week, which is also unchanged from the prior year. By comparison, 68% watched a movie on a TV or cable network channel, 49% went to a theater, and 21% used paid video on demand through their TVs.

When asked about their recent spending on home video, consumers reported that 78% of their home video budgets went to the purchase and rental of DVD and BD, including online and in-store retail purchases and rentals, while 15% was spent on video subscription services such as Netflix that offer a mix of physical and streaming rentals. Digital video downloads, paid streaming, paid transactional video-on-demand (VOD), and pay-per-view (PPV) comprised the remaining 8%.

Overall per-capita spending on home video fell by 2% during the first quarter, according to the survey.

SOURCE: NPD Group, Russ Crupnick, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-0700; russ_crupnick@npd.com; www.npdgroup.com.

More DVDs Rented From Kiosks Than Retail Stores

Unsurprisingly, the share of DVDs and Blu-ray Discs rented from Redbox and other standalone kiosks overtook the share of retail store rentals in the U.S. in 2010, according to NPD.

Netflix and other subscription services comprise 41% of video rentals as of the third quarter of 2010, followed by kiosk rentals at 31%, and in-store rentals at 27%. The share of videos rented from kiosks increased by 10 percentage points since the third quarter of 2009, while subscription rental services' share is up by two percentage points. In-store rentals are down by 13 points, as fewer consumers visit flagging Blockbuster outlets and smaller shops.

SOURCE: NPD Group, Russ Crupnick, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-0700; russ_crupnick@npd.com; www.npdgroup.com.

Home Movie Market Contracts In '10, Despite Blu-ray, Digital Growth

Blu-ray software sales rose by 68% in 2010, helping to offset slackening demand for DVDs in the home entertainment market, according to year-end figures released by DEG: The Digital Entertainment Group.

Consumers purchased $1.8 billion worth of Blu-ray discs in 2010. Blu-ray rentals, meanwhile, topped $500 million, with rentals from brick-and-mortar outlets up 34% over 2009.

Blu-ray devices — including set-top players and videogame consoles — have sold through more than 28.5 million units since the format's launch in 2007. Some six million devices sold in the fourth quarter of 2010 alone, bringing total units sold during the year to 11.25 million, according to DEG with input from retail tracking sources.

Digital distribution also contributed materially to the home entertainment sector in 2010, edging Blu-ray in overall annual value.

Consumer spending on broadband electronic sell-through (EST) and video on demand (VOD) were up a combined 19% to $2.5 billion. VOD brought in $1.8 billion, up 21% for the year, while EST grew 16% to $683 million.

The trade group estimates that VOD transactions offset the decline of the entire rental category. Without VOD, rentals would have been down by 2% for the year; with VOD, the category is up by 2% to $7.8 billion. (The DEG bases its 2010 rental estimates on input from multiple studios and restated 2009 figures from Rentrak.)

Overall consumer transactions for prerecorded content grew by 1% during the year.

The combined value of the movie rental and sell-through businesses during 2010 was $18.8 billion, a 3% decline from 2009. DVD sales and rentals slipped 11% in value year-over-year, ending 2010 at $14 billion.

SOURCE: DEG: Digital Entertainment Group, Lyndsey Schaefer, Associate Director, 10635 Santa Monica Blvd., #160, Los Angeles, CA 90025; 424-248-3811; schaefer@degonline.org; www.degonline.org.

DVD Decline Still Outpaces Growth In VOD, Downloads, Blu-ray

Releasing home entertainment spending figures for the first quarter of 2011, DEG: The Digital Entertainment Group says that studios faced a difficult comparison with last year's blockbuster-heavy Q1, as total home entertainment spending decreased 9.8% year-on-year to $4.2 billion.

Sell-through of DVDs and other packaged goods was down by a total of 20% during the quarter, to $2.1 billion. However, the trade group notes that the box-office value of the 2011 quarter's release slate was 25% less than during the same period in 2010. In addition, unlike last year's quarter, Q1 2011 lacked the Easter holiday weekend, which according to the group remains a considerable home entertainment marketing opportunity.

Blu-ray disc sales continued to grow, up by nearly 10% from Q1 in 2010, while sales of Blu-ray players (including PlayStation 3 consoles) increased by 13% during he quarter. The total household penetration of Blu-ray compatible devices now stands at nearly 30 million U.S. homes.

Digital businesses are also increasing. Video-on-demand products were worth $473.2 million to the industry during the quarter, an 8.7% increase from Q1 2010. Electronic sell-through sales increased 10.4% to $140.6 million.

The DEG adds that sell-through of both physical and digital home entertainment products has picked up by 20% year-over-year in the first few weeks of the second quarter.

SOURCE: DEG: Digital Entertainment Group, Lyndsey Schaefer, Associate Director, 10635 Santa Monica Blvd., #160, Los Angeles, CA 90025; 424-248-3811; schaefer@degonline.org; www.degonline.org.

Spending On Disc Rentals Rises

Home entertainment consumers still love their DVD and Blu-ray discs — especially when it comes to rentals.

Consumer spending on disc rentals during the second quarter of 2011 topped $1.48 billion, a 5.9% increase from the same quarter in 2010, according to Rentrak. Discs-by-mail subscription services and rental kiosks fueled the growth — which is hardly surprising, given the number of brick-and-mortar rental outlets that have closed in the past 12 months.

Rentrak's David Paiko notes that although overall brick-and-mortar rental activity declined during the second quarter, "many of the larger brick-and-mortar [chains'] average revenue per store increased versus last year — which indicates that the lesser performing stores are the ones being closed, and the remaining stronger performing stores are doing well."

Paiko adds that the home entertainment industry could see "a more energized brick-and-mortar rental segment for the second half of the year," thanks to the staying power of remaining local stores and Blockbuster's implementation of a new marketing strategy.

Rentrak does not break out the role of individual companies played in the Q2 disc-rental increase. One wonders how large a part Netflix's discs-by-mail service played during the second quarter, given the company's emphasis on streaming services; the effect of Netflix repositioning discs-by-mail as a stand-alone subscription option, distinct from streaming, remains to be seen.

The Rentrak data follows a first-half 2011 report by DEG: The Digital Entertainment Group that estimated consumers' overall rental spending, including streaming subscriptions and video-on-demand transactions, is now outpacing purchases of discs and downloadable files.

SOURCE: Rentrak, David Paiko, VP Home Video, 7700 NE Ambassador Pl., 3rd Fl., Portland, OR 97220; 503-284-7581; www.rentrak.com.

Video Rentals Outpace Sales In First Half Of 2011

Mid-year home entertainment spending data from DEG: The Digital Entertainment Group shows Americans preferring video rentals over purchases of packaged and digital media for the first time since the year 2000. But preferences have not shifted so suddenly: the trade group has included subscription plans such as Netflix's DVD and streaming service within its rental category for the first time this year.

During the first half of 2011, total rental revenue — including subscription services, automated kiosks, video-on-demand, and brick-and-mortar outlets — topped $4.1 billion, an 11% increase from the first half of 2010 (see table below). Increases in subscriptions, kiosks, and video-on-demand offset a 28% decline in rental revenues from brick-and-mortar chains during the period (largely brought about by Blockbuster's store closures).

In comparison, sales of DVDs, Blu-ray discs, and electronic downloads declined by 17% from the first half of 2010, to $4.1 billion. The DEG claims the industry faces difficult year-over-year comparisons with 2010: last year, Twentieth Century Fox Home Entertainment's *Avatar* sold more than 12 million discs in the second quarter alone.

DEG also reports that the total household penetration of Blu-ray devices now stands at 31.6 million U.S. homes; consumer spending on Blu-ray (including both sales and rentals) increased by 10% during the first half of 2011.

U.S. HOME ENTERTAINMENT CONSUMER SPENDING, JANUARY-JUNE, 2010-2011 (IN MILLIONS)

	FIRST HALF 2010	FIRST HALF 2011	% CHANGE
SELL-THROUGH			
Packaged goods (DVD, Blu-ray)	$4,738	$3,870	-18.3%
Electronic sell-through	$260	$270	3.9%
Total sell-through	$4,998	$4,140	-17.2%
RENTALS			
Brick-and-mortar rental	$1,242	$897	-27.8%
Subscription plans (discs by mail, streaming)	$1,074	$1,564	45.7%
Kiosks	$576	$806	39.8%
Video-on-demand	$890	$929	4.4%
Total rentals	$3,782	$4,195	10.9%
TOTAL U.S. HOME ENTERTAINMENT SPENDING	**$8,780**	**$8,336**	**-5.1%**

NOTE: Figures and percentages are rounded.

SOURCE: DEG: Digital Entertainment Group

SOURCE: DEG: Digital Entertainment Group, Lyndsey Schaefer, Associate Director, 10635 Santa Monica Blvd., #160, Los Angeles, CA 90025; 424-248-3811; schaefer@degonline.org.

African Americans Watch More TV Than Others

African Americans watch an average of two hours more television per day than adults overall, according to Nielsen. Asian Americans watch two hours less per day than others.

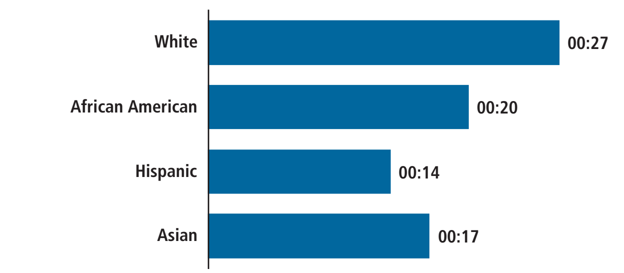
There are interesting differences in formats consumed as well — African Americans spend more time than other groups watching DVDs and playing console-based videogames, while Non-Hispanic Whites spend more time watching programs recorded on DVR.

Whites are most likely to own DVRs, while Hispanics are least likely. African Americans watch much more live TV than members of any other racial/ethnic group: more than six hours per day. Asians watch less than half as much; Whites watch just over four hours.

Although choice of programming varies considerably by race and ethnicity, NFL football is the most-watched broadcast programming by Blacks, Whites, and Asians.

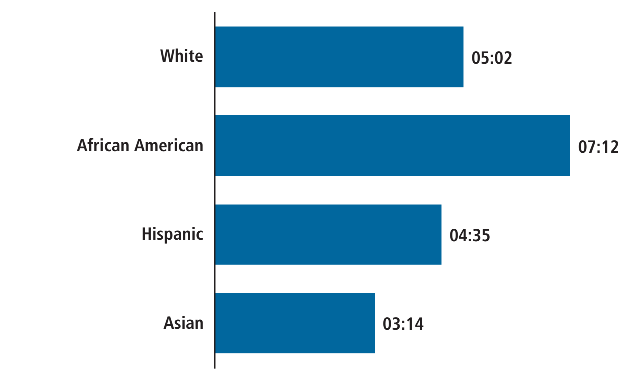
SOURCE: "State of the Media: March 2011, U.S TV Trends by Ethnicity," Kathleen Mathus, Communications Analyst, Television, Nielsen, 770 Broadway, New York, NY 10003; 646-654-5000; kathleen.mathus@nielsen.com; www.nielsen.com. Price: Available online with registration.

DAILY TIME AMERICANS SPEND WATCHING TV PROGRAMS RECORDED ON DVR, BY RACE/ETHNICITY
(hours: minutes)



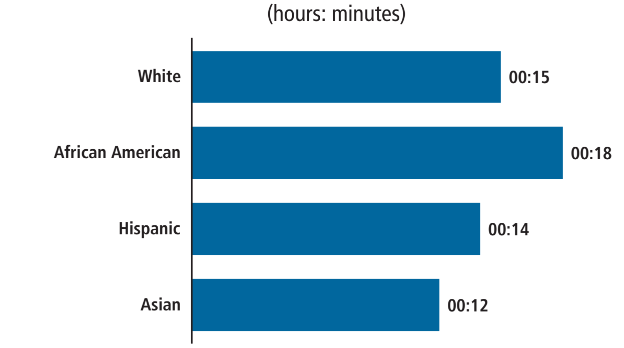
SOURCE: Nielsen

DAILY TIME AMERICANS SPEND WATCHING TV (ALL FORMS), BY RACE/ETHNICITY
(hours: minutes)



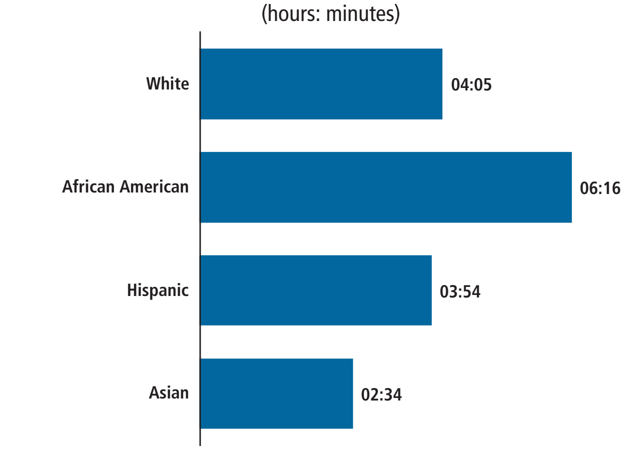
SOURCE: Nielsen

DAILY TIME AMERICANS SPEND WATCHING DVDS, BY RACE/ETHNICITY
(hours: minutes)



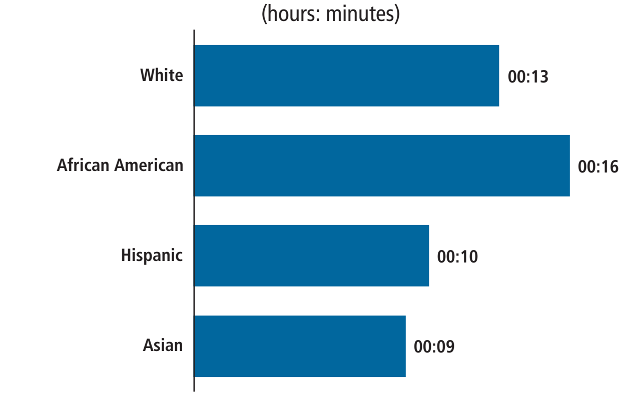
SOURCE: Nielsen

DAILY TIME AMERICANS SPEND WATCHING LIVE TV, BY RACE/ETHNICITY
(hours: minutes)



SOURCE: Nielsen

DAILY TIME AMERICANS SPEND PLAYING VIDEOGAMES, BY RACE/ETHNICITY
(hours: minutes)



SOURCE: Nielsen

Asians Juggle Mobile Web With Other Media

Asian Americans are more likely than other U.S. adults to combine their mobile Internet use with other forms of media, according to Luth Research cited in *Profiles of the U.S. Simultaneous Media User,* by the Editors of Research Alert. Asians are twice as likely as Non-Hispanic Whites to watch TV while accessing the Internet on their phones, and almost twice as likely as Blacks and Hispanics to do so.

Blacks are more likely than Hispanics, Whites, or Asians to use print media such as books, magazines, and newspapers while going online on their phones.

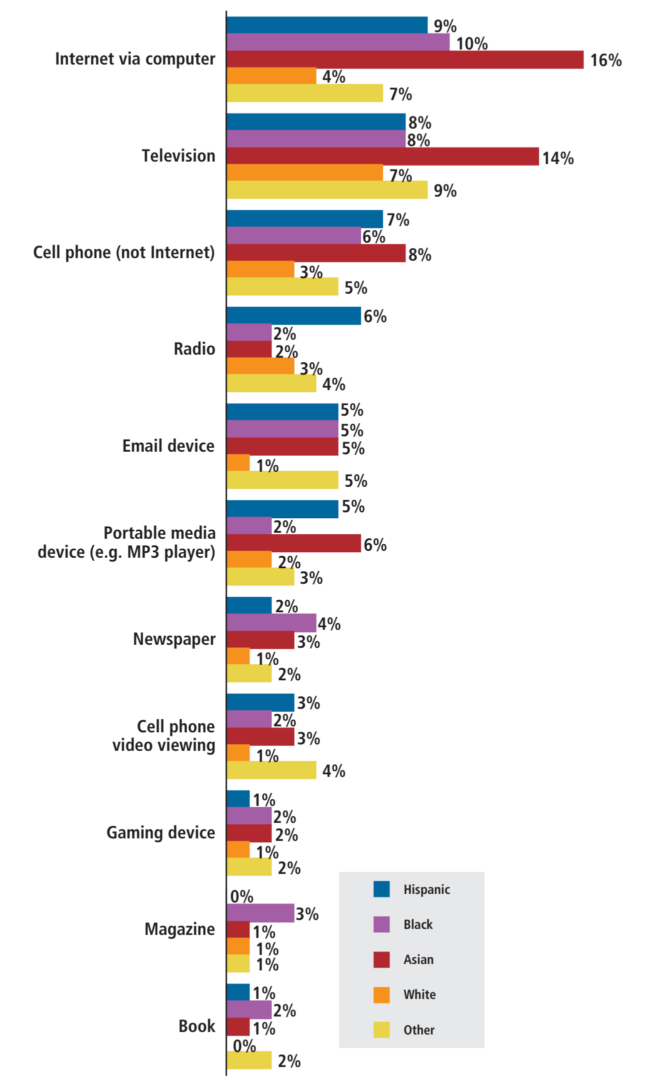
Hispanics are more likely than members of other racial/ethnic groups to combine being online at a computer with listening to the radio or talking on cell phones. Asians are least likely of all racial/ethnic groups to combine listening to the radio with accessing the Internet via computer.

Asians are less likely than either Blacks or Hispanics to watch TV while using the Internet on a computer but are more likely to use the Internet on both mobile phones and computers at the same time.

Blacks and Hispanics are more likely than Whites or Asians to use MP3 players and similar portable media devices while they're on the Internet via computer.

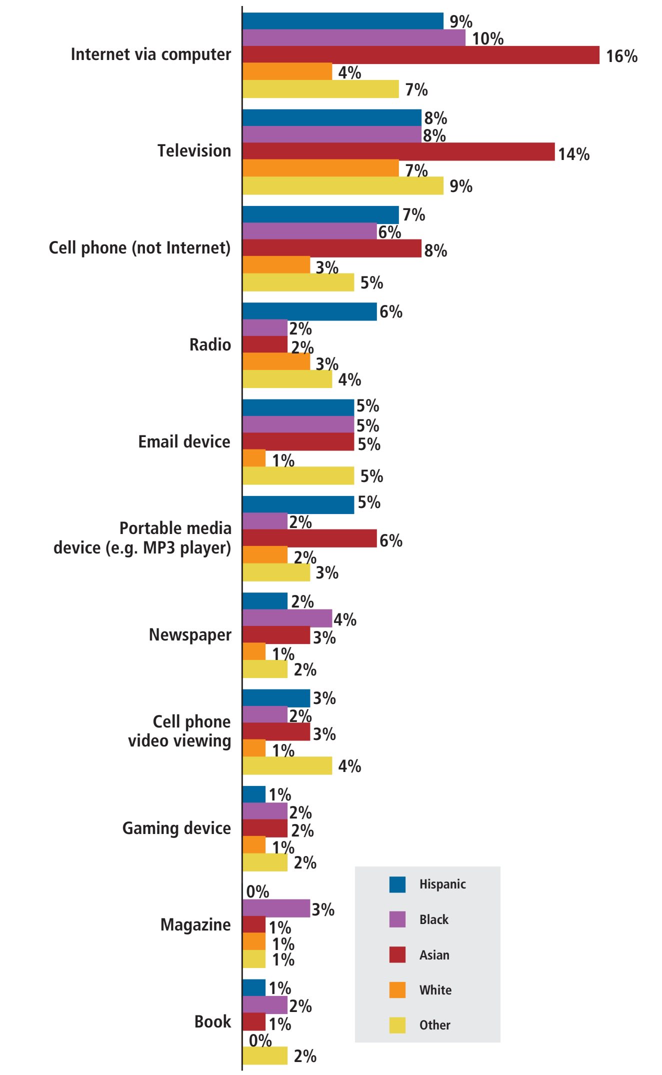
Americans whose race/ethnicity is listed as "other" spend the most time using two or more media simultaneously — a mean of 16.0 hours per week. Hispanics spend nearly 15 hours per week using media in combination. Non-Hispanic Whites are the least likely to use multiple media together, but they still spend nearly 13 hours doing so in a typical week.

MEDIA U.S. CONSUMERS USE WHILE USING INTERNET ON MOBILE PHONE, BY RACE/ETHNICITY



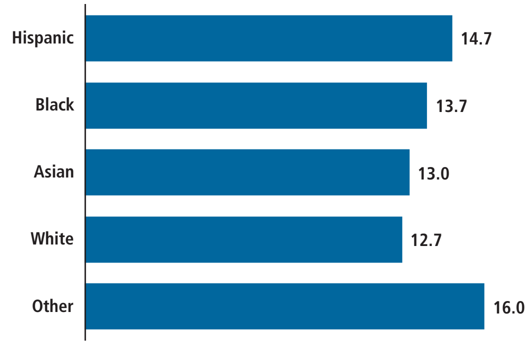
SOURCE: Luth Research

MEDIA U.S. CONSUMERS USE WHILE USING INTERNET ON COMPUTER, BY RACE/ETHNICITY



SOURCE: Luth Research

MEAN HOURS PER WEEK AMERICANS SPEND USING TWO OR MORE MEDIA SIMULTANEOUSLY, BY RACE/ETHNICITY



SOURCE: Luth Research

SOURCE: "Profiles of the U.S. Simultaneous Media User: Television, Online, Mobile, Print," EPM Communications, Ira Mayer, President, 19 W. 21st St., #303, New York, NY 10010; 212-941-0099; imayer@epmcom.com; www.epmcom.com. Price: $597; $497 for subscribers.

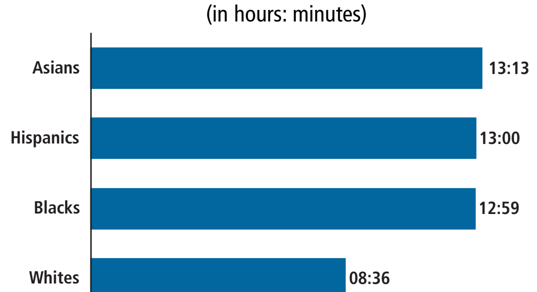
Minority Kids And Teens Spend The Most Time "Plugged In" To Media

Asian American children and teens ages 8-18 spend the most time "plugged in," followed by Hispanic, Black, and White children, according to a report from Northwestern University. Overall, minority children spend 4.5 hours more than White kids using media and mobile devices each day.

Blacks (3:23 or three hours, 23 minutes) and Hispanics (3:08) spend the most time watching TV each day, compared to Asians (2:28) and Whites (2:14).

Similarly, Blacks (84%) and Hispanics (77%) are most likely to have TVs in their bedrooms; 64% of Whites and Asians have them in their rooms. More than three in four Blacks (78%) and 67% of Hispanics say the TV is "usually" on during meals. Some 58% of Whites and 55% of Asians usually eat meals in front of the TV.

8-18-YEAR-OLDS' DAILY MEDIA USE, BY RACE/ETHNICITY
(in hours: minutes)



NOTE: Media use includes watching TV, playing videogames, listening to music, and using cellphones.

SOURCE: Northwestern University

Asian teens and children spend the most time each day using mobile devices (3:07); their Hispanic counterparts spend 2:53 each day using mobile devices, Blacks spend 2:52, and Whites spend 1:20 each day.

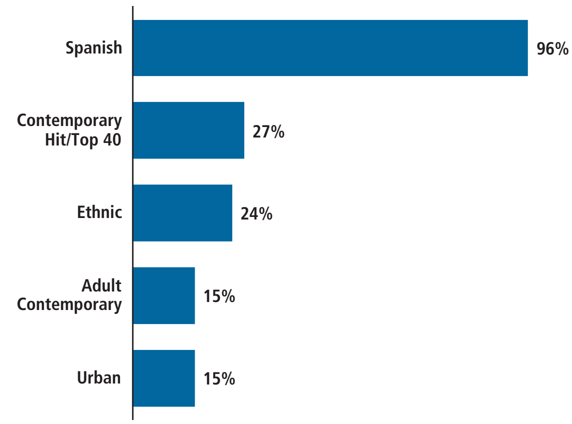
Teens and children, regardless of race/ethnicity, spend only about 16-20 minutes a day on schoolwork.

SOURCE: Northwestern University, Ellen Wartella, Director Center on Media and Human Development, School of Communication, 2240 Campus Dr., Evanston, IL 60208; 847-467-2750; ellen-wartella@northwestern.edu.

Blacks, Hispanics Prefer Targeted Radio

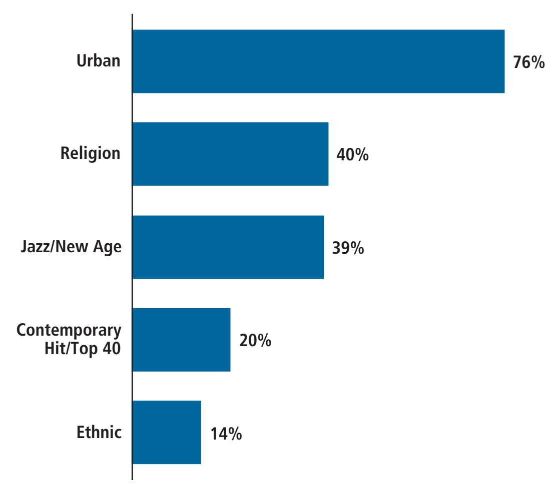
Blacks' and Hispanics' radio listening preferences differ significantly from those of the general market, according to research at the University of Minnesota. Urban format stations attract more than half of Black listeners (54%), while drawing only 4% of non-Black listeners. Black listeners

TOP FIVE HISPANIC RADIO FORMATS,
BY PROPORTION OF LISTENERS WHO ARE HISPANIC



SOURCE: Carlson School of Management, University of Minnesota

TOP FIVE BLACK RADIO FORMATS,
BY PROPORTION OF LISTENERS WHO ARE BLACK



SOURCE: Carlson School of Management, University of Minnesota account for more than three quarters (76%) of Urban stations' total audience.

Five formats — Urban, Religion, Contemporary Hit Radio/Top 40, Jazz/New Age, and Adult Contemporary — attract 86% of all Black listeners and only a third (33%) of non-Black listeners.

Similarly, Spanish-format radio attracts 51% of all Hispanic listeners and less than 1% of non-Hispanic listeners; 96% of these stations' listeners are Hispanic. Other popular formats among Hispanics include Contemporary Hit Radio/Top 40, Adult Contemporary, Urban, and Oldies.

Although the majority of "minority-format" radio stations are not minority-owned, minority-owned stations are more likely to broadcast in these formats than in other formats.

SOURCE: "Radio Station Ownership Structure and the Provision of Programming to Minority Audiences: Evidence from 2005-2009," June 6, 2011, Joel Waldfogel, Professor, Carlson School of Management, University of Minnesota, 321 19th Ave., So, Minneapolis, MN 55455; 612-626-7128; jwaldfog@umn.edu; www.umn.edu. Price: Available online at no charge.

Super Bowl Gaining Black & Hispanic Viewers

African Americans and Hispanics tuned into Super Bowl XLV in record numbers, reports Nielsen. Viewership increased 20.5% among Hispanics between 2010 and 2011, and 11.6% among African Americans (calculations by Research Alert). Viewership among all adults rose only 4.7% during that time.

SUPER BOWL VIEWING AMONG AFRICAN AMERICANS AND HISPANICS, 2009-2011

(Numbers in thousands)

	AFRICAN AMERICANS	HISPANICS	OVERALL U.S. POPULATION
2011	12,508	10,042	111,441
2010	11,242	8,275	106,453
2009	10,666	7,842	98,716

NOTE: Includes live and same-day viewing.

SOURCE: Nielsen

SOURCE: Nielsen, Kathleen Mathus, Communications Analyst, Television, 770 Broadway, New York, NY 10003; 646-654-5000; Kathleen.mathus@nielsen.com; www.nielsen.com. Price: Contact for information.

Theatrical Market Increasingly Driven By 3D Films, Frequent Moviegoers: MPAA

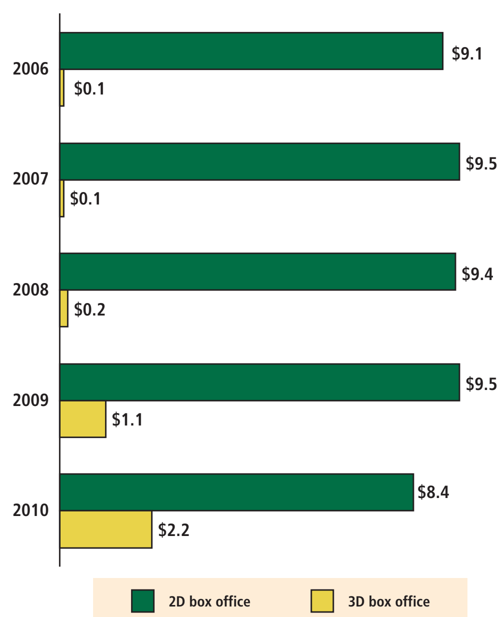
The overall moviegoer market in the U.S. and Canada was flat in 2010 at $10.6 billion, with audiences for premium-priced 3D films and frequent moviegoers comprising a higher proportion of the market than ever, according to the Motion Picture Association of America (MPAA).

The number of tickets sold in the U.S. and Canada declined by 5% in 2010 to 1.34 billion, representing a return to the market level of 2008. While the MPAA estimates the number of unique moviegoers to be up by 3% compared to the previous year, the average number of movies they attended declined to six in 2010, from 6.5 in 2009.

The 3D market comprised 21% of the 2010 box office in the U.S. and Canada, compared to just 2% in 2008. 3D receipts topped $2.2 billion in 2010, double 2009's total. One in three people in the U.S. and Canada saw a 3D movie in 2010, with younger audiences representing the market's most avid consumers. Some 64% of moviegoers ages 2-17 viewed at least one 3D movie in 2010. Studios released 3D versions of 25 films in 2010, up from 20 in 2009.

Frequent moviegoers — those who go to the movies once a month or more — also continue to drive the market. Frequent moviegoers make up only 11% of the total population in the U.S. and Canada, but they purchased more than half of all tickets sold in 2010.

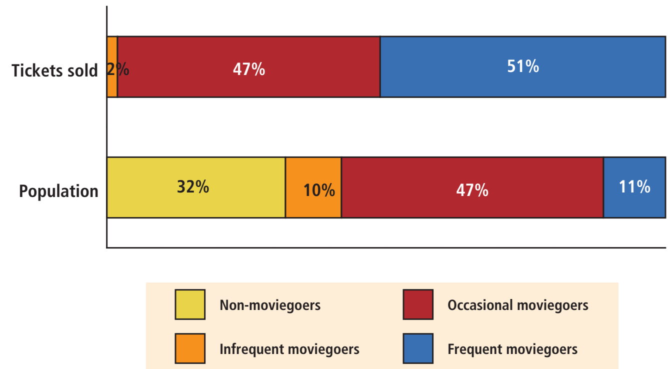
U.S./CANADA BOX OFFICE: 2D VS. 3D
In Billions of U.S. Dollars



NOTES: MPAA calculates 3D box office and release numbers based on data from MPAA member studios and from IHS Screen Digest. Includes only box office earned from 3D showings, not total box office for films with a 3D release.

SOURCE: MPAA/Rentrak Box Office Essentials

U.S./CANADA MOVIEGOER PROPORTION OF POPULATION AND TICKETS SOLD, 2010



NOTES: MPAA's demographic attendance analysis is based on survey research (sample size=4,253) and attendance projections by Infogroup/Opinion Research Corporation. Beginning in 2009, several changes were made to the survey research, including covering calendar year, rather than summer-to-summer, and all age groups of movie ticket age (age 2 and over), rather than age 12 and over only. Therefore, data prior to 2009 is not comparable. All demographics are based on U.S. surveying only.

SOURCE: MPAA

The number of frequent moviegoers rose to 35 million, up by three million people from 2009. Men of nearly all age groups joined the frequent moviegoer category in 2010, along with women aged 18-39. The only decline in the number of frequent moviegoers occurred among 40-49-year-olds: the number of women in the frequent category in that age group dropped by nearly one million in 2010, according to the MPAA. In total, female frequent moviegoers purchased fewer tickets in 2010, while male frequent moviegoers purchased more.

More than two-thirds of the combined population of the U.S. and Canada (68%) — some 222.7 million people — went to the movies at least once in 2010. The number of moviegoers increased by 2.6% over 2009's total of 217.1 million, outpacing the countries' population growth (1%, based on data from the U.S. Census Bureau and Statistics Canada for the population aged 2 and over).

Audiences aged 12-24 represent nearly one quarter of moviegoers, and nearly one-third of tickets sold. However, fewer tickets were sold to 18-24 year olds in 2010. The 25-39 age group, meanwhile, increased its attendance to 25% of tickets sold in 2010, compared to 20% in 2009.

SOURCE: Motion Picture Association of America (MPAA), Elizabeth Kaltman, VP Corporate Communications, 15301 Ventura Blvd., Bldg. E, Sherman Oaks, CA 91403; 818-995-6600; www.mpaa.org.

Music Marketing: Digital Services, Indie Stores Gain Share In 2010; Streaming Of Top Tracks Doubles

As entertainment marketers enter the new decade, growth opportunities center largely on digital distribution and e-commerce. At least for the music industry, the digital market is evolving differently than labels envisioned (read: hoped) it would, according to analysis of year-end data by Nielsen SoundScan.

Meanwhile, the last brick-and-mortar music retailers standing — having so far withstood the decline of CD sales — may have modest growth prospects ahead of them, if mass merchants and chains cut floor space for packaged music at a faster rate.

Digital Song Sales Stall In '10; Streaming Surges

Sales of digital tracks passed the 1 billion mark for the third straight year in 2010, reports Nielsen SoundScan. Surprisingly, however, the overall category grew by only 1% from 2009.

Still, 2010 was a growth year for a handful of hit songs, which wound up commanding a greater share of the overall market. Five digital tracks each broke the 4 million sales mark in 2010, compared to four in 2009; 37 songs had sales exceeding 2 million, compared to 31 in 2009. In addition, nine different artists broke the 10 million digital track sales barrier, compared to four artists in the previous year.

Internet streaming of top songs more than doubled in 2010, establishing the platform as ripe for sponsorships and tie-ins from mass-market advertisers. The 10 most-streamed songs in 2010 collectively accounted for 190.4 million plays, representing a 140% increase over the 79.2 million plays garnered by the 10 most-streamed songs in 2009, according to Nielsen Broadcast Data Systems.

A key issue in 2011 will be whether track downloads resume their growth, or whether music audiences demonstrate an even greater preference for streaming access over digital library building.

CURRENT VS. CATALOG ALBUM SALES 2009-2010
(In Millions)

	2010	2009	CHANGE
Current physical	143.0	170.8	-16.2%
Current digital	44.3	39.1	13%
Catalog physical	97.0	126.6	-23.4%
Catalog digital	41.9	37.3	12%
Deep catalog physical	74.9	95.9	-21.9%
Deep catalog digital	31.2	27.5	13%

NOTE: "Catalog" releases are 12-36 months old. "Deep Catalog" releases are more than 36 months old.

SOURCE: Nielsen SoundScan

ONLINE PHYSICAL ALBUM SALES VS. DOWNLOADS
(In Millions)

	2010	2009	CHANGE
Online album sales*	24.9	25.3	-1.6%
Digital album sales	86.3	76.4	13.0%

NOTE: *Physical albums sold via e-commerce sites. Period spans Jan. 4, 2010 through Jan. 2, 2011.

SOURCE: Nielsen SoundScan

TOP 10 SELLING DIGITAL TRACKS, 2010

TITLE/ARTIST	UNITS SOLD (MILLIONS)
1. "California Gurls"/Katy Perry feat. Snoop Dogg	4.4
2. "Hey, Soul Sister," Train	4.3
3. "Love The Way You Lie"/Eminem feat. Rihanna	4.2
4. "Dynamite"/Taio Cruz	4.1
5. "Airplanes"/B.o.B. feat. Hayley Williams	4.0
6. "OMG"/Usher feat. Will.i.am	3.8
7. "Not Afraid"/Eminem	3.4
8. "Just The Way You Are"/Bruno Mars	3.3
9. "Break Your Heart"/Taio Cruz feat. Ludacris	3.2
10. "Need You Now"/Lady Antebellum	3.2

NOTE: Sales figures combine all versions of same song.

SOURCE: Nielsen SoundScan

TOP 10 INTERNET STREAMED SONGS, 2010

TITLE/ARTIST	STREAMS (MILLIONS)
1. "Love The Way You Lie"/Eminem feat. Rihanna	22.4
2. "Need You Now"/Lady Antebellum	22.1
3. "Tik Tok"/Ke$ha	20.2
4. "Just A Dream"/Nelly	19.5
5. "Just The Way You Are"/Bruno Mars	18.5
6. "Airplanes"/B.o.B. feat. Hayley Williams	18.5
7. "Breakeven"/Script	18.2
8. "Break Your Heart"/Taio Cruz feat. Ludacris	17.5
9. "I Like It"/Enrique Iglesias feat. Pitbull	16.9
10. "OMG"/Usher feat. Will.i.am	16.9

SOURCE: Nielsen Broadcast Data Systems

LP ALBUM SALES, 2010
(In Millions)

	2010	2009	CHANGE
Vinyl units sold	2.8	2.5	14%

SOURCE: Nielsen SoundScan

ALBUM SALES BY SELECTED GENRES, 2010
(In Millions)

	2010	2009	CHANGE
Alternative	53.7	68.2	-21%
Christian/Gospel*	24.2	27.8	-13%
Country	43.7	46.1	-5%
Latin	12.4	16.5	-25%
Metal	32.6	38.7	-16%
R&B	57.9	69.9	-17%
Rap	27.3	26.4	3%
Rock	103.7	124.2	-16%
Soundtrack	16.4	19.0	-14%

NOTE: Titles may appear in more than one genre.

SOURCE: Nielsen SoundScan/*Christian SoundScan

Mass Merchants, Specialty Chains Scale Back

Mass merchants such as Walmart and chains such as Best Buy claimed a smaller share of album sales in 2010, which provided growth opportunities for digital retailers such as iTunes and independent brick-and-mortar shops. (Granted, they are larger slices of a smaller pie, with total album sales posting another double-digit decline.)

Mass merchants now account for 33% of total album sales, compared to 36% in 2009, according to SoundScan. Chains' share is down to 23% from 29% in the previous year. Digital download services currently account for more than a quarter (26%) of album sales, while e-commerce sales of physical albums at Amazon.com and other online storefronts account for 7%.

Independent music stores gained two percentage points in 2010, growing their album market share to 8% from 6% in 2009. Products such as vinyl LPs continue to provide a hook for indie shops: while vinyl album sales rose in 2010 to 2.8 million units total, 71% of all vinyl albums were purchased at an independent music store, SoundScan says.

One Week At A Time

The undeniable climate change in the music industry has brought with it new sales extremes.

Total music purchases during the week ending Dec. 26, 2010 topped 60 million. That is the third-highest weekly 2010 total in SoundScan's history; the same week in 2008 still claims the most music purchases with 65 million.

Yet early in 2011, the lows were ever lower.

Post-holiday weeks are typically soft for album sales. Alternative rock band Cake's album, *Showroom of Compassion,* topped album sales for the week ending January 16th with the lowest-ever total in the Soundscan era: 44,000 copies.

The lowering of the music sales bar, combined with the continuing mass-media cachet of the *Billboard* charts, spell opportunities for savvy second-tier music marketers — similar to the seasonally slow box office weekends that film marketers fight over. For long-term marketing campaigns, Number One is still No. 1.

SOURCE: Nielsen SoundScan, Rob Sisco, President, 1 N. Lexington Ave., 14th Fl., White Plains, NY 10601; 914-328-9100; rsisco@vnuentertainment.com; www.soundscan.com.

Digital Music Market Posted Modest Gains In 2010: RIAA

Music fans in the U.S. purchased 1.16 billion digital singles in 2010, representing an increase of just 2% from 2009, according to year-end figures released by the Recording Industry Association of America (RIAA).

Although the trade group acknowledges that digital download unit growth was modest, stronger growth in digital album shipments (up 8.8% in 2010, to 83.1 million units), along with the first full year of labels' variable pricing strategy at digital retail, helped the total value of the digital download market increase by 10% in 2010, to $2.2 billion.

The value of the digital single market alone was up 12% last year, to $1.36 billion, as labels priced more hit songs at $1.29 each on iTunes. Those value gains could prove to be short-lived, however, if Amazon succeeds in capturing market share with its newly introduced 69-cent pricing of hit tracks.

Including products such as ringtones and subscriptions, along with digital performance royalties, the overall digital music market in 2010 was worth $3.2 billion — an increase of 3% over 2009. The RIAA notes that value gains in download sales and digital performance royalties offset a 28% sales slide in mobile products.

Don't Call It A Comeback

On the physical distribution side, CD sales declined 21% to $3.36 billion, while the industry shipped 23% fewer units (225.8 million).

Vinyl continues to provide a relatively feel-good datapoint. Shipments of vinyl LPs and EPs increased by 25% year-over-year in 2010 to 4 million units, representing a value of $87 million. While the year-over-year increases are substantial, they must be viewed in context. The vinyl shipment total pales in comparison to the format's peak year in 1977, when labels shipped more than 344 million discs.

Last year was not the first to see a vinyl resurgence, either. As *Digital Music News* recently pointed out, sales of LPs and EPs in 1998 topped 3.4 million; that year represents 6% higher sales than 2009's total of 3.2 million.

DIGITAL AND PHYSICAL MUSIC MARKETS, 2010

	2009	2010	CHANGE
Total units (millions)	1,851.8	1,726.3	-6.8%
Total value (millions)	$7,683.9	6,850.1	-10.9%
PERCENT OF SHIPMENTS			
Physical	59%	53%	
Digital	41%	47%	

NOTE: Units total includes both albums and singles, and does not include subscriptions or royalties.

SOURCE: RIAA

SOURCES: Digital Music News, Paul Resnikoff, Publisher, 1158 26th St., #206, Santa Monica, CA 90403; 310-928-1498; www.digitalmusicnews.com.

RIAA, Joshua Friedlander, VP Research & Strategic Analysis, 1025 F St. NW, 10th Fl., Washington, DC 20004; 212-775-0101; www.riaa.com.

Volume Looking Up In U.S. Album Sales

U.S. music consumers purchased 228.5 million albums in 2011 through September, a 3.3% increase over the same period in 2010, according to Nielsen SoundScan. As a result, the music industry is on pace to post its first annual album sales increase since 2004, *Billboard* reports.

Hit titles are part of the story — Adele's *21*, released in

February 2011, has sold nearly 3.8 million copies through September (both physical and digital units). But the year has also seen a breakthrough in purchases of digital albums, which are up 19.7% to 74.1 million units through September. Digital represents 32.4% of the total albums sold in the year to date.

Of course, a volume increase does not necessarily equate to a revenue lift for music retailers, which have run aggressive price promotions on some of the year's biggest releases (e.g., Amazon and Lady Gaga).

SOURCES: Nielsen Entertainment, Chris Muratore, VP Merchant Services & Emerging Growth, 646-654-5000, chris.muratore@nielsen.com.

Digital Music Consumers Use Diverse Formats

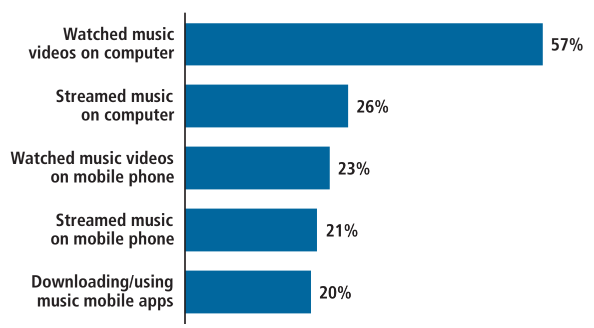
Music videos are the most popular format for digital music consumption, according to Nielsen and MIDEM. Nearly six in 10 global online consumers (57%) have watched music videos on computers in the last three months. Music consumption habits are diverse; most digital music consumers use a variety of formats. Currently the computer is the most popular tool for accessing digital music, but interest in listening to audio and watching videos on mobile devices is growing.

Physical formats still have a following, too: 42% of online consumers plan to buy music on CD or DVD in the next few months.

Almost half of music consumers (49%) listen to digital music on their computers several times a week; 28% listen daily. More than a third stream music (36%) or listen at social networking sites (35%) several times a week. Three in 10 (30%) listen to music on their mobile phones and 27% listen on portable MP3 players several times a week.

Adults ages 21-34 form the core audience for digital music; they're more likely to engage with digital music in all formats. These young adults are more likely than others to download music for free (legally or illegally) and are also the most likely to be willing to pay for music downloads. Half have downloaded music for free in the past three months, and 20% have paid for music downloads during the same time.

HOW GLOBAL ONLINE CONSUMERS HAVE USED DIGITAL MUSIC IN PAST THREE MONTHS



SOURCES: Nielsen and MIDEM

SOURCES: "The Hyper-Fragmented World of Music," March 2011; "Digital Music: Willingness to Pay for Music," January 2011; and "Digital Music Consumption and Digital Music Access," January 2011, by Nielsen and MIDEM. Nielsen, Matthew Hurst, Communications Analyst, 770 Broadway, New York, NY 10003; 646-654-5000; matthew.hurst@nielsen.com; www.nielsen.com. (Studies available for download on Nielsen website.)

MIDEM, Stéphane Gambetta, Marketing Director, 11 rue du Colonel Pierre Avia - BP 572, 75726 Paris Cedex 15, France; 011-33-141904634; stephane.gambetta@reedmidem.com; www.midem.com.

Why They Buy: Ownership Prevails Over Streaming Access In Music

Approximately nine in 10 online music consumers (89%) prefer to "own" the music they like rather than stream it, according to an Insight Research Group survey commissioned by subscription service eMusic.

Nearly as many online music consumers (86%) "feel that ownership gives them security that their files will not disappear." This consumer sentiment should also comfort marketers of paid video downloads, including forthcoming UltraViolet movies.

Among the survey's other findings:

- Only 13% pay to stream music online; 84% of consumers who pay to stream also purchase digital music files.
- 74% stream music for free, but wouldn't pay to stream.
- 39% of online music consumers would consider storing music files they own in a cloud-based locker, so that they can listen to them anywhere.

Insight Research Group conducted the survey in August and September 2011, obtaining responses from 1,000 online music consumers ages 18-64 nationwide. An unspecified portion of the survey group subscribe to eMusic's service.

SOURCE: eMusic, Brad Soroca, CMO, eMusic, 244 Fifth Ave., #2070, New York, NY 10001; 212-201-9240; www.emusic.com.

Mobile Music Firm: iTunes Users Listen To Just 19% Of Their Libraries

Digital music consumers never actually play most of the songs and albums they have acquired, according to a study by an app developer that helps iTunes users transfer music playlists to Android devices.

"The average iTunes library has 5,409 songs of which 4,195 have never been played. Put another way: we listen to about 19% of the music we own," according to Music WithMe, which says that it derives its figures from anonymous customer data.

The mobile music firm does not appear to account for resets of song play counts that occur when iTunes users transfer their collections to a new computer or rebuild their libraries.

Nevertheless, Music WithMe concludes that new "cloud-based" streaming services such as Google Music, which invite consumers to upload their entire music libraries to online lockers, largely represent a waste of time. (While in its beta version, Google's music storage service is free.)

SOURCE: ParkVu (Music WithMe), Michelle Jones, Community Manager, 806 1/2 E. Market, Louisville, KY 40206; 502-410-2137; music.withme.com.

Netflix Viewers Favor Streaming To TVs, Hulu Users Stick With PCs

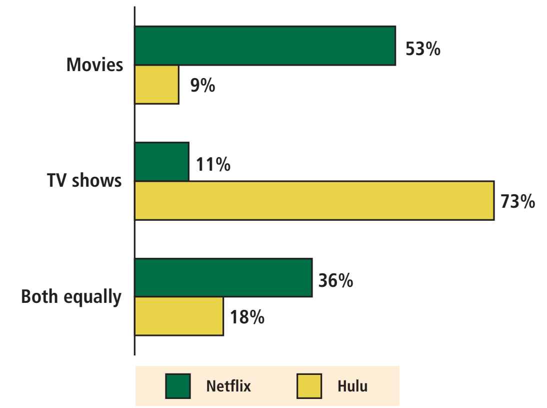
Most Netflix users (90%) use the service to watch streaming movies and TV shows on their televisions, while computer screens remain the most popular medium for rival Hulu streaming service (89%), according to Nielsen.

Half of all Netflix users (50%) access the service via an Internet-connected videogame console, be it Sony's PlayStation 3, Microsoft's Xbox 360, or Nintendo's Wii. The percentage of Hulu users accessing the service via game consoles is notably smaller (8%).

Viewers also use other Internet-enabled devices, such as the Roku Box, Google TV devices and Apple TV, as means for connecting with both Hulu and Netflix. But usage of any one of these devices remains small. For example, the Roku box — one of the first Internet video receivers for televisions, claims only 5% of Netflix users and 3% of Hulu users.

Hulu and Netflix users also trend toward different content types. Some 73% of Hulu users view primarily TV shows, compared to 11% of Netflix users, Nielsen says, citing survey data from March 2011. More than half (53%) of Netflix users watch primarily movies, while 9% of Hulu users say the same. Twice as many Netflix users as Hulu users watch both movies and TV shows equally (see graph below).

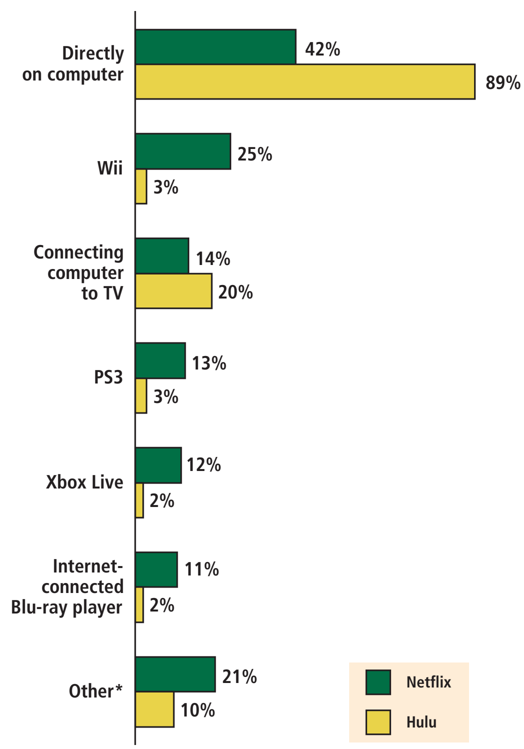
WHAT NETFLIX AND HULU USERS ARE WATCHING



NOTE:Data from online survey of 12,000 Netflix/Hulu users, March 2011.

SOURCE: Nielsen

HOW NETFLIX AND HULU USERS ARE WATCHING VIDEO



NOTES:*Other includes Internet-enabled TV; Roku box; directly on mobile phone; iPad; TiVo (Netflix only); Google TV; and Apple TV. Data from online survey of 12,000 Netflix/Hulu users, March 2011. Respondents could select more than one method.

SOURCE: Nielsen

These percentages, however, will likely fluctuate as both Netflix and Hulu diversify their content mix, and implement new access restrictions on certain programming. In late July, for example, Netflix began streaming the first four seasons of Lionsgate's hit TV series, *Mad Men*. Hulu, meanwhile, is implementing a program with Fox in August whereby paid "Hulu Plus" subscribers can view new episodes of TV series such as *Glee* the day after they air on Fox's broadcast network; users of Hulu's free service must wait 8 days after broadcast to access the same episodes online.

SOURCE: Nielsen, Matt O' Grady, EVP Media Audience Measurement, matt.ogrady@nielsen.com; www.nielsen.com.

For Streaming Video Service Users, Price Matters Most

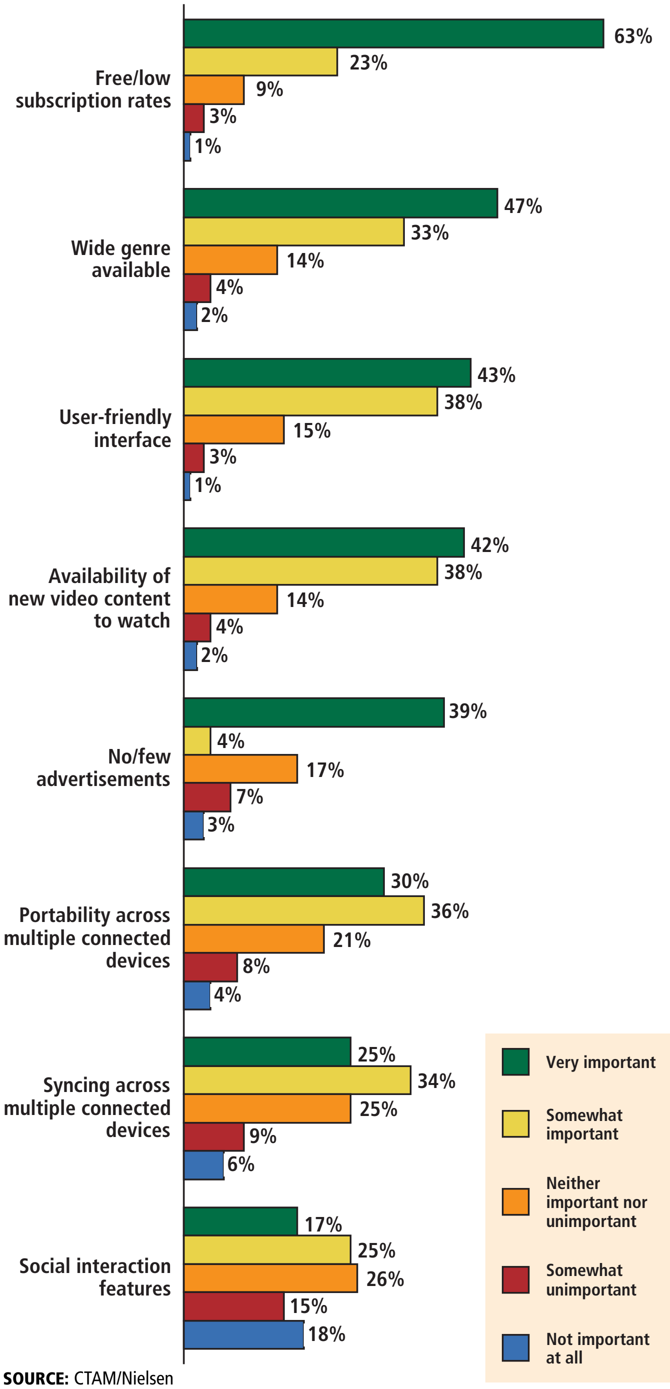
UltraViolet, Keychest, and TV Everywhere marketers, take note: among users of Internet video services such as Hulu, Netflix, and YouTube, content still wants to be free. Consumers' continued emphasis on price is especially significant as TV and film studios prepare to introduce more premium services enabling digital and mobile access to video programming.

Free or low subscription rates are important to 86% of users, according to the Cable & Telecommunications Association for Marketing (CTAM) and Nielsen. Meanwhile, 80% of the survey's 1,510 respondents say that availability of new content, along with a wide range of content genres, are other important service attributes.

Fewer respondents, albeit more than half, place importance on portability across multiple connected devices (66%), or syncing across multiple connected devices (59%).

Consumer awareness of these features may be relatively

IMPORTANCE OF VIDEO APP ATTRIBUTES



SOURCE: CTAM/Nielsen

low — i.e., they just don't know they want portability and syncing yet. Indeed, the CTAM/Nielsen data reveals the opportunity, as well as the challenge, for marketers to sell consumers on the value of new digital services such as TV Everywhere and UltraViolet.

Cable operators and networks only recently began offering TV Everywhere-type video apps, enabling subscribers to access digital streams of programming from computers and portable devices. Meanwhile, Hollywood is readying two cloud-based mobile access platforms — the multi-studio-backed UltraViolet, and Disney's All Access Keychest — for this holiday season.

SOURCE: CTAM, "Roadmap to Video Apps (What Makes Consumers APPy?)," Angie Britt, VP Advanced Products., 120 Waterfront St., #200, National Harbor, MD 20745; 301-485-8901; www.ctam.com/videoapps.

Buyers of Blu-ray Players Favor Streaming Capabilities

Among U.S. consumers who intend to buy a Blu-ray set-top player in the next 6 months, 50% cite their desire to stream subscription video services more easily to their TV as a primary motivating factor, according to The NPD Group.

Some 15% of U.S. consumers reported using a Blu-ray player in the prior six months in March 2011, up from 9% the prior year. Meanwhile, the number of Blu-ray disc buyers in the U.S. has grown to account for more than one-fifth of the country's packaged home entertainment market.

NPD estimates that there are currently 116 million physical disc buyers in the U.S., which is down 9.4% from 128 million in 2009. However, NPD says, the country's nearly 26 million Blu-ray buyers have helped to keep that number from sliding further. Blu-ray buyers are also beginning to buy more movies than they did in 2009 or 2010, including both new releases and older catalog content, thanks to lower disc prices.

Blu-ray players, along with connected TVs, will be the predominant drivers of household broadband video adoption over the next several years, NPD says. By 2015, 175 million users will watch broadband video from their homes.

Pay TV will be impacted by the growth of broadband video, but broadband video is unlikely to entice consumers to completely end their pay TV subscriptions. According to NPD, only 4% of consumers have completely given up pay TV service — although 9% say they have reduced the amount they spent on pay TV in the past year, and an additional 11% say they are likely to reduce their pay TV in the next year.

SOURCE: NPD Group, Russ Crupnick, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-0700; russ_crupnick@npd.com; www.npdgroup.com.

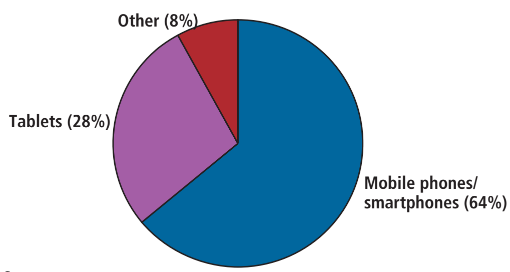
Media Usually Don't Have Consumers' Full Attention; Most TV Viewers Are Engaged In Other Activities

Seven in 10 adults ages 18-49 are engaged in at least one other activity while watching TV during primetime, according to Media Behavior Institute data cited by Nielsen. Eight in 10 viewers who watch at noon are also doing other activities.

In terms of media used concurrently with television, social networks are the media most likely to be used while watching either live TV or shows recorded on DVR, according to Media Behavior Institute data cited.

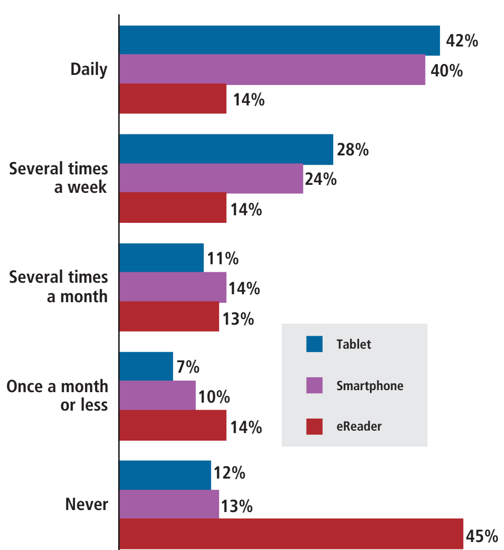
In many cases this reflects viewers discussing what they're viewing with their social network connections. Print, mobile for talk and/or text, and Internet are all equally likely to be used while watching TV (about 20% of viewers use each). Fewer use these media while watching DVR-recorded programs, with the exception of print, which is used as often as while watching live TV.

U.S. INTERNET TRAFFIC ON DEVICES OTHER THAN COMPUTERS, BY TYPE OF DEVICE, AUGUST 2011



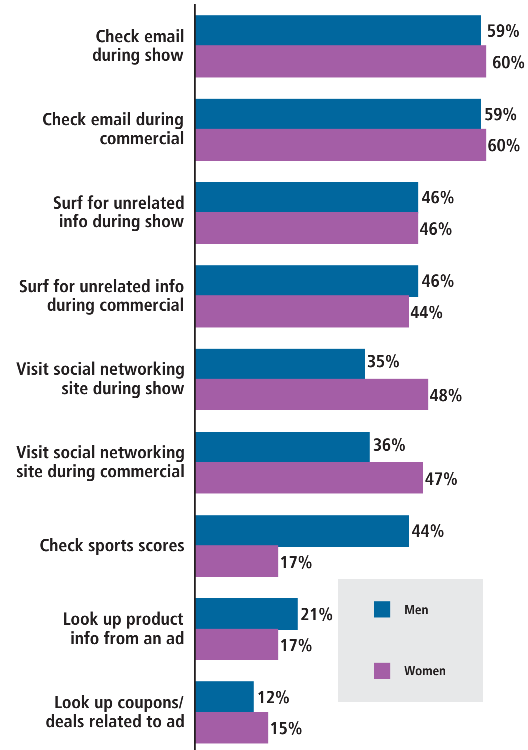
SOURCE: comScore

HOW OFTEN AMERICANS USE MOBILE DEVICES WHILE WATCHING TV
(Among tablet, smartphone, and eReader owners)



SOURCE: Nielsen

HOW MEN AND WOMEN USE TABLETS AND/OR SMARTPHONES WHILE WATCHING TV



SOURCE: Nielsen

Four in 10 owners of smartphones (40%) or tablets (42%) use these devices every day while watching TV. The top use of smartphones or tablets while watching TV is checking email; viewers are just as likely to check email during the program they're watching as they are during commercial breaks. Women are more likely than men to use their mobile devices to visit social networks, while men are more likely than women to use theirs to check sports scores (reflecting the gender skews of these activities overall).

Although women make up the majority (55%) of social network users, men comprise 55% of those who talk about TV programs on social networks.

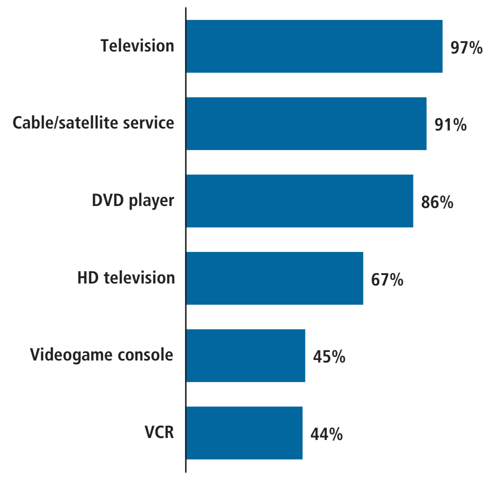
Consumers are becoming increasingly device-agnostic in how they use media, whether it's for communication, information-gathering, or entertainment. As their options expand, and as the devices themselves become ever-more-multifunctional, people are starting to use whatever is most convenient or otherwise best suited to the needs of the moment.

Although computers still account for more than 90% of online traffic, that is changing rapidly, according to comScore. Globally, the U.S. has the second-highest proportion of Internet traffic (measured as browser-based page views) coming from sources other than computers (6.8%); Singapore is highest, at 7.2%. U.S. Internet traffic from non-computer sources grew 9% between May and August 2011 (calculations by Research Alert).

Mobile phones account for the majority of non-computer Internet traffic, but tablets are quickly gaining ground. In May 2011, tablets accounted for 23% of non-computer traffic; by August, their share had risen to 28%.

Asian Americans are more likely than Americans of other races to watch TV or go online on a computer while also accessing the Internet on a cell phone, according to Luth Research data cited in "Profiles of the U.S. Simultaneous Media User," from EPM Communications, publisher of Research Alert. Hispanics are more likely than non-Hispanics to watch TV, go online via computer, or listen to radio while using their cell phones to talk or text. Women are 46% more likely than men to watch TV while talking or texting on a cell phone, and 29% more likely to access the Internet via computer while talking or texting, according to Luth Research data cited (calculations by Research Alert).

TV/VIDEO TECHNOLOGIES OWNED BY U.S. HOUSEHOLDS, 2011



SOURCE: Nielsen

SOURCES: "Cross-Platform Is The New Norm," October 2011, Nielsen, Pat McDonough, SVP Insights & Analysis, 770 Broadway, New York, NY 10003; 646-654-5000; patricia.mcdonough@nielsen.com; www.nielsen.com. Price: Available online at no charge.

Media Behavior Institute, Jim Spaeth, Co-founder, 116 E. 27th St., 6th Fl., New York, NY 10016; 212-696-9299; info@mediabehavior.com; www.mediabehavior.com

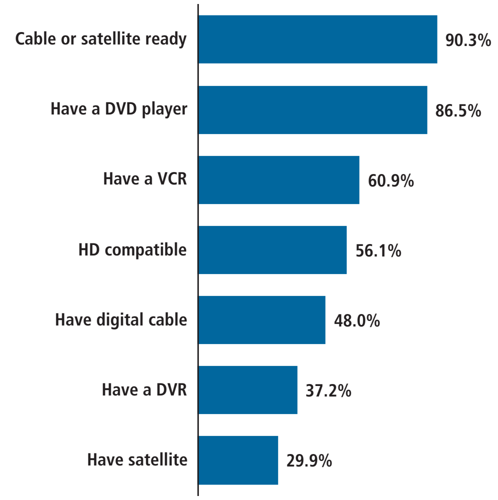
"Digital Omnivores: How Tablets, Smartphones, and Connected Devices Are Changing U.S. Digital Media Consumption Habits," October 2011, comScore, Mark Donovan, SVP Mobile, 11950 Democracy Dr., #600, Reston, VA 20190; 703-438-2000; www.comscore.com. Price: Available online at no charge.

"Profiles of the U.S. Simultaneous Media User: Television, Online, Mobile, Print," 2011, EPM Communications, Ira Mayer, Publisher, 19 W. 21st St., #303, New York, NY 10010; 212-941-0099; info@epmcom.com; www.epmcom.com. Price: $597; $497 for Research Alert members.

Americans' TV Viewing Is Assisted By Cable, DVD, VCR, And DVR

There are 115.9 million households with televisions in the U.S., and the average household has 2.5 sets, according to

DEVICES THAT ARE HOOKED UP TO AMERICANS' TV SETS, 2010



SOURCE: Nielsen Company

Nielsen Company. Almost two thirds of those sets are standard definition, and one third are high definition.

Households with at least one high definition set own more TVs overall than those with only standard definition sets (2.7 vs. 2.1). High definition households own an average of 1.5 HDTVs and 1.2 standard definition TVs.

Some 31% of Americans own four or more TV sets.

Americans watch an average of 35.6 hours of TV in a typical week. Adults aged 65 and older over-index, watching an average of 48.9 hours, and children aged 2-11 under-index, watching an average of 25.8 hours.

Some 2 hours, 9 minutes, of Americans' TV viewing is time-shifted. In addition, more than a fifth of TV viewing (21%) in households with a DVR is time-shifted. Nearly half of commercials (45%) that are recorded are watched, which suggests that not all those who are time-shifting TV are also time-crunching TV.

SOURCE: "State of the Media 2010: U.S. Audiences & Devices," 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.

Four In 10 Households Own DVRs

Almost four in 10 U.S. households (38%) own DVRs, according to Nielsen. White and Asian households are more likely than Hispanic or Black households to have DVRs.

DVR watching is most prevalent among affluent households; those with incomes of $100,000 or more make up 29% of DVR playback watchers, but only 19% of the overall population. Although the majority (62%) of DVR viewers are younger than 45, the demographics are shifting as the technology moves into mainstream adoption.

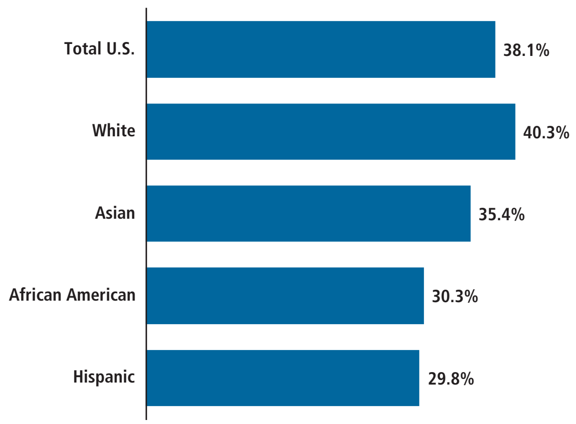
Most (88%) of the primetime broadcast programming that's recorded on DVR is played back within three days after the original airtime; 49% is played back the same day. Prime watching hours for recorded programming are the same as for live TV watching: peak hours are 9-10 p.m.

In the majority of DVR households, the DVR is part of the cable box (58%) or satellite box (40%); only 3% of DVR owners have stand-alone devices.

Although watching prerecorded shows allows viewers to fast-forward through commercials, many DVR viewers do watch the ads.

Some genres are more popular than others for watching in recorded form. Viewers often prefer to watch sports and news programs live, while science fiction and sitcoms are likely to be watched later.

DVR OWNERSHIP IN U.S. HOUSEHOLDS, BY RACE/ETHNICITY



SOURCE: Nielsen

SOURCE: "December 2010 State of the Media: DVR Use in the U.S.," Nielsen, Kathleeen Mathus, Communications Analyst, Television, 770 Broadway, New York, NY 10003; 646-654-5000; kathleen.mathus@nielsen.com; www.nielsen.com. This report is available for download: http://blog.nielsen. com /nielsenwire/wp-content/uploads/2010/12/DVR-State-of-the-Media-Report.pdf

Almost Half Of TV Households Have DVRs; On-Demand Viewing Up

Approximately 44% of TV households in the U.S. have at least one digital video recorder (DVR), and a third of DVR households (14% of all households) have more than one DVR, according to Leichtman Research Group. DVR owners remain largely satisfied with the time-shifting service: 80% give their DVRs a rating of 8-10 (on a 1-10 scale with 10 being excellent), compared to 80% in 2010, and 77% in 2009.

Meanwhile, nearly three quarters of all digital cable subscribers (73%) have ever used video-on-demand (VOD) — be it a cable provider's own VOD offer, or Netflix's streaming Watch Instantly service. Most VOD users (87%) have watched an on-demand program in the past month; nearly two thirds of digital cable subscribers overall (62%) have used VOD in the past month, representing an increase of 10 percentage points from 2010.

Some 62% of cable VOD users (both free and premium programming) give their services an 8-10 rating, compared to 60% in 2010, and 55% in 2009. But viewers of paid VOD programming are generally more satisfied with the service than viewers of free programs: some 74% of premium VOD users give the service an 8-10 rating, compared to 54% of non-premium on-demand users who do so.

More than six in 10 Netflix subscribers (63%) rate the company's Watch Instantly feature between "8" and "10" (on a 1-10 scale, with "10" being an extremely important feature or benefit of the Netflix service). That percentage compares favorably to 48% in 2010, and 37% in 2009. [Leichtman Research Group conducted its satisfaction survey between August and September of 2011, as Netflix stumbled in explaining its price increase for combined discs-by-mail and streaming services.]

One in five Netflix subscribers (20%) use the Watch Instantly service daily, compared to 10% who did so in 2010. More than half (57%) use the Watch Instantly service on a weekly basis, compared to 43% in 2010.

More than three quarters of Watch Instantly users (78%) watch movies and TV shows from the service on their TVs.

Netflix remains largely complementary to cable: 86% of Netflix households subscribe to a multi-channel video service, and 43% with multi-channel video service subscribe to a premium service — similar to all households in the sample, and similar to Netflix households in 2010.

SOURCE: Leichtman Research Group, Bruce Leichtman, President, 3 Ellison Ln., Durham, NH 03824; 603-397-5400; info@leichtmanresearch.com; www.leichtmanresearch.com.

Fifteen Minutes Serve As The Prime Of 'Primetime'

Within the traditional primetime television window during the week is 8:00 p.m. to 11:00 p.m., more Americans tune in from 9:15 p.m. to 9:30 p.m. than any other period, according to Nielsen. The tail end of primetime — 10:45 p.m. to 11:00 p.m. — is when the fewest viewers use their televisions.

There are no differences between when men and women watch TV during primetime, Nielsen says. Age is a factor, however: for viewers ages 18-49, 9:45 p.m. to 10:00 p.m. is prime viewing time, while 8:00 p.m. to 8:15 p.m. is when they use their TVs the least.

SOURCE: Nielsen, Kathleen Mathus, Communications Analyst, Television, 770 Broadway, New York, NY 10003; 646-654-5000; kathleen.mathus@nielsen.com; www.nielsen.com.

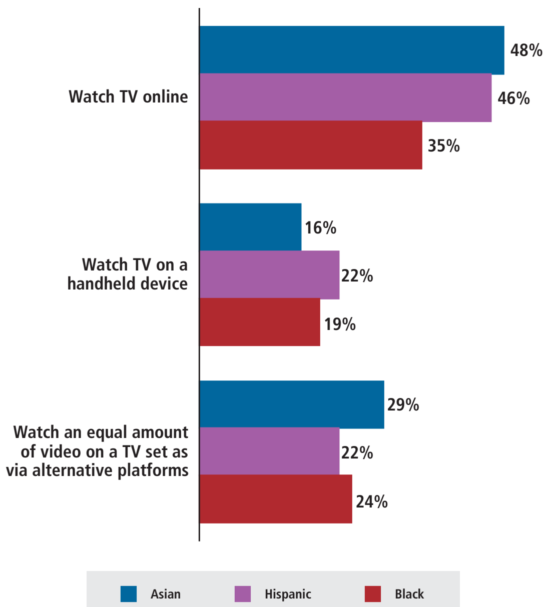
Americans Embrace Alternative Video Platforms, But Don't Cancel Subscription TV Services

Although Americans are embracing alternative platforms such as handheld devices and online streaming to view television programs, 75% of Whites, 75% of Hispanics, 74% of Blacks, and 70% of Asians report they primarily watch television via a traditional TV set, according to Horowitz Associates.

In addition, a small proportion of each population would consider canceling their traditional TV subscription services if more of their favorite TV programming were available online. Only 13% of Blacks, 18% of Hispanics, 24% of Asians, and 25% of Whites would think about doing so.

It is important to note that Hispanics and Blacks are less likely than Whites and Asians to have broadband Internet access at home, though they are rapidly adopting the technology.

USE OF ALTERNATIVE VIDEO VIEWING PLATFORMS, BY RACE/ETHNICITY



SOURCE: Horowitz Associates

SOURCE: Horowitz Associates, Adriana Waterson, VP Marketing & Business Development, 1971 Palmer Ave., Larchmont, NY 10538; 914-834-5999; adrianaw@horowitzassociates.com; www.horowitzassociates.com.

TV Research Roundup: Urban Markets Embracing 'Alternative' Sources; DVR Penetration Still On The Rise

Among urban consumers, viewing of television programming is becoming increasingly fragmented across "alternative" devices, ranging from streaming-video boxes and game consoles hooked into home sets, to smartphones and tablets. Meanwhile, across all U.S. TV audiences, time-shifting via digital video recorders (DVRs) continues to establish itself as a new norm.

Urban Markets Use Alternative TV Sources

On at least a weekly basis, nearly one third of urban consumers (31%) watch TV content via alternative platforms such as on a computer/laptop, on a mobile device/tablet, or streamed directly from the Internet to the TV through an "over-the-top" device such as an Apple TV, a Vudu Box, an Xbox, or a Blu-ray player, according to Horowitz Associates.

Those who use alternative platforms for TV spend, on average, 15% of their viewing time on a platform other than traditional TV. This is in addition to time devoted to digital TV platforms such as DVRs and video-on-demand (VOD).

Multicultural urban consumers over-index for using alternative platforms for TV compared to their White counterparts, Horowitz reports. Almost half of Asian urban consumers (41%) watch TV content on alternative platforms at least weekly, as do 37% of Hispanic and 36% of Black urban consumers, versus 25% of White non-Hispanic urban consumers. Through a computer/laptop alone, 35% of Asians report at least weekly TV viewing, compared to 22%, 17%, and 15% among Hispanic, Black, and White consumers, respectively.

Computers and over-the-top platforms aside, penetration of video-enabled mobile devices such as smartphones/iPhones, iPads, and gaming gadgets increased from 35% in 2010 to 46% in 2011. This, along with the expanded availability of mobile apps providing access to professionally created content from major media companies, is paving the way to an increase in viewership of TV content on mobile platforms. Self-reported weekly viewership of TV content on mobile devices alone has increased from 4% in 2010 to 10% in 2011. Incidence of weekly mobile TV viewing is highest among Black and Hispanic urban consumers: 14% of each group report at least weekly viewing, compared to 7% among White and 5% among Asian urban consumers.

DVR Usage Spreading

The DVR is still gaining influence among American TV households, according to Nielsen.

Overall time-shifting of programs by U.S. TV audiences increased by double digits in the third and fourth quarters of 2010, with the average American watching nearly 10 and a half hours of time-shifted TV at the end of the year. The biggest year-over-year increase was in the third quarter, when time-shifting increased 17.9% over the same period in 2009; the fourth quarter saw a 13.4% year-over-year gain.

The overall increases in time-shifting are not primarily sdriven by more DVR viewing per home, Nielsen says, but by more homes using DVRs. During the fourth quarter, the average person in a DVR home watched nearly 26 hours of time-shifted television per month, representing a year-over-year increase of 19 minutes.

SOURCES: "State of Cable and Digital Media — 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.

"State of the Media: TV Usage Trends," Nielsen, Jon Gibs, VP Analytics, 700 Broadway, New York, NY 10003; 646-654-5000; jon.gibs@nielsen.com; www.nielsen.com.

Nine Out Of 10 U.S. Consumers Pay For TV Service

Even with the rise of Internet and mobile video — and television ownership down — the overall number of U.S. households paying for TV services has held steady over the past year, research firm Nielsen maintains in a new report.

Some 91% of consumers pay for cable, satellite, or telco-provided TV service as of the first quarter of 2011, Nielsen says. In addition, overall TV viewership increased by 22 minutes per month per person from last year.

In May, Nielsen reported the first decline in television ownership among U.S. consumers in the past 20 years. Among the contributing factors: "a small subset of younger, urban consumers" seemed to favor watching TV programs via computers and mobile devices.

But while it avoids any mention of "cord-cutting" in its new report, Nielsen now says that the heaviest at-home viewers of streaming video content — led by those ages 18-34 — watch less traditional TV than the general population, while the lightest TV watchers stream more.

For now, "cord cutting" seems to consist mostly of cable TV subscribers switching to either satellite or telco TV service.

Nielsen posits a coexistence between traditional TV and streaming among most households. "Though we're seeing strong growth for mobile and Internet video, traditional TV remains dominant," says Nielsen's Matt O'Grady. "Each month, U.S. consumers spent nearly 159 hours viewing TV in their homes, four and a half hours viewing Internet video on their computer, and more than four hours watching video on their mobile devices."

SOURCE: Nielsen, Matt O' Grady, EVP Media Audience Measurement, matt.ogrady@nielsen.com; www.nielsen.com.

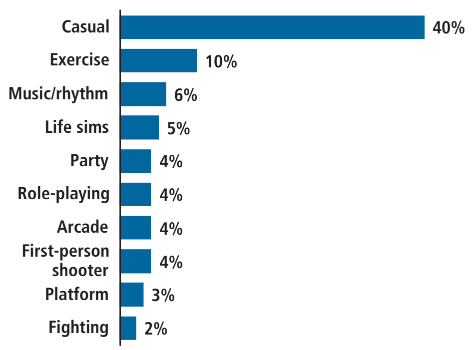
As Videogames Shift Toward Mobile, Consoles Are Becoming Multi-Function Entertainment Centers

Just over a quarter of U.S. households (26%) buy videogames, according to Nielsen. Women make up half (50%) of videogame players, but their gaming preferences and motivations for playing differ from men's, according to Interpret. Women's top gaming genres are casual, exercise, and music, while men gravitate to first-person shooter and casual titles, as well as traditional sports and role-playing games.

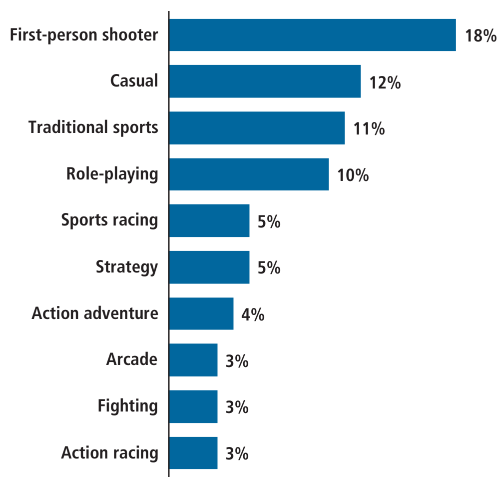
Women (53%) are more likely than men (44%) to prefer playing solitary games, even when they're playing online, and less likely to enjoy competing against other players, teaming up and collaborating, or talking about games with others.

Interest in gaming is growing fastest among women ages 45-65, who make up 33% of all female gamers, up 22% since 2009 (calculations by Research Alert). Women in this age group strongly favor casual games (67% prefer them), while gamers in their teens and 20s enjoy a wider range of games.

WOMEN'S FAVORITE VIDEOGAME GENRES

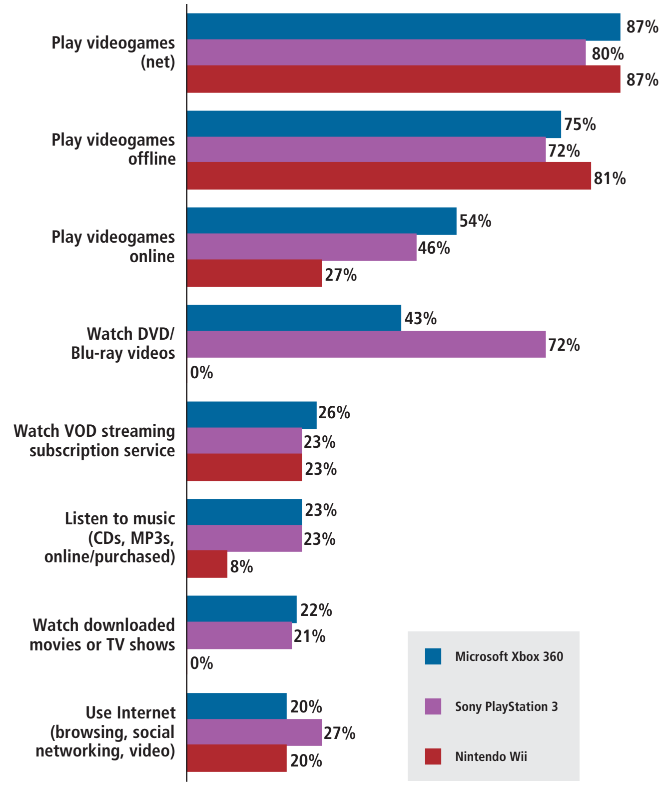


MEN'S FAVORITE VIDEOGAME GENRES



SOURCE: Interpret

HOW VIDEOGAME CONSOLE OWNERS AGES 13+ USE THEIR CONSOLES



SOURCE: Nielsen

Gaming Consoles

Although women and men are equally likely to play videogames, male console owners spend significantly more time using their consoles each week than female console owners do, according to Nielsen. The gender gap is especially pronounced among owners of Microsoft Xbox 360 and Sony PlayStation 3 consoles.

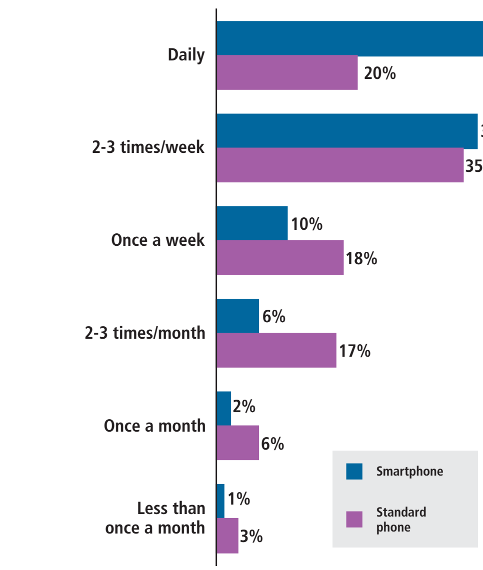
Consoles are increasingly used as multipurpose entertainment platforms. Usage of consoles for non-gaming activities varies according to specific brand, in part because some companies have emphasized these functions in their marketing and product development.

PlayStation 3 owners, for example, spend less than half their time (49%) with the device on gaming, compared to 69% for owners of the Nintendo Wii and 62% for owners of the Xbox 360. About a quarter of console owners use their devices for activities such as watching videos on demand; listening to music on CD or MP3; and using the Internet for social networking, watching video, or browsing.

Mobile Gaming

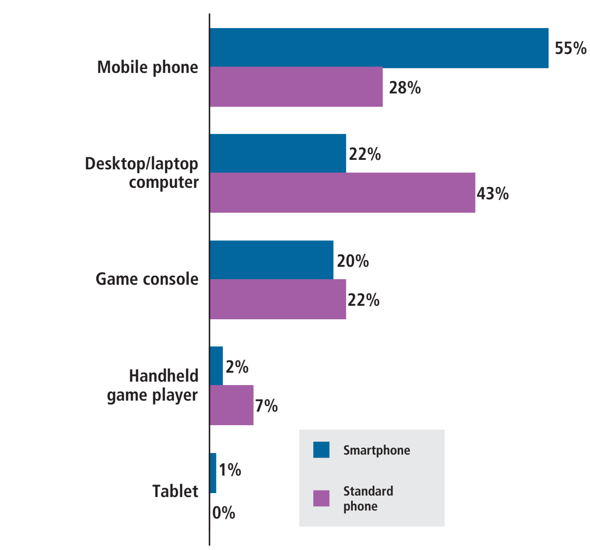
More than half of mobile phone owners (52%) in the U.S. and UK have played games on their phones, according to Information Solutions Group for PopCap Games. British

HOW OFTEN U.S. AND UK MOBILE GAMERS PLAY, BY TYPE OF MOBILE PHONE OWNED



SOURCE: Information Solutions Group for PopCap Games

DEVICES MOBILE GAMERS USE MOST OFTEN WHEN PLAYING VIDEOGAMES, BY TYPE OF MOBILE PHONE OWNED, 2011



SOURCE: Information Solutions Group for PopCap Games

mobile phone owners (73%) are more likely than their U.S. counterparts to have used their phones for gaming (44%). Two in 10 American mobile owners (21%) and 35% of British mobile owners are avid mobile gamers (defined as having played in the past week).

U.S. mobile gamers are more likely than their UK counterparts to recommend games they like to others: 60% of U.S. gamers who have played in the past month have recommended games to others, compared to 53% of UK gamers.

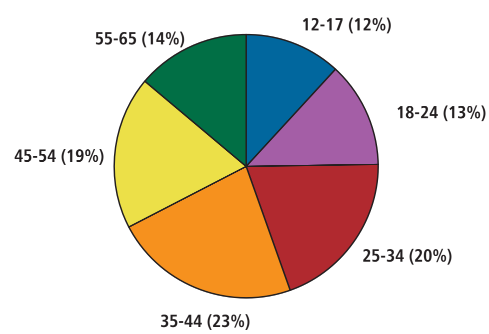
Just over half (55%) of avid mobile gamers are male. Almost half (47%) of avid mobile gamers play daily, as do 35% of mobile gamers (defined as those who have played at least once in the past month). Owners of smartphones are much more likely than owners of traditional phones to be avid mobile gamers. Six in 10 mobile gamers (61%) and 69% of avid gamers own smartphones.

Smartphone owners also spend more time playing mobile games than owners of traditional cell phones do: 37% of smartphone owners play at least an hour per week, compared to 25% of owners of traditional phones. Smartphone gamers bought an average of 5.4 mobile games in 2010, compared to 2.9 bought by gamers with standard phones.

Smartphone owners spent $25.57 and standard-phone owners spent $15.70 on mobile games in 2010. Although mobile gaming is more widespread in the U.K, U.S. gamers spend more money on mobile games. U.S. gamers spent an average of $25.25 on mobile games in 2010 and expect to spend $25.94 in 2011, while UK gamers spent $17.85 in 2010 and expect to spend $18.82 in 2011.

Gaming accounts for 23% of non-calling mobile phone usage among all mobile gamers and 27% among avid gamers. Mobile gamers are transferring some of their videogame play from computers to mobile phones. In 2009, 53% said they played videogames most often on their computers, while 17% said they played most often on their phones. In 2011, 30% play most often on computers, while 44% play most often on mobile phones.

FEMALE VIDEOGAME PLAYERS, BY AGE, 2011



SOURCE: Interpret

SOURCES: "Nielsen 360 Gaming Report," January 2011, Nielsen, Charlie Pollak, Senior Analyst, Games Research, 200 W. Jackson, #2100, Chicago, IL 60606; 312-583-5249; charlie.pollak@nielsen.com; www.nielsen.com. Price: Contact for information.

"Games and Girls: Video Gaming's Ignored Audience, May 2011," Interpret, Josh Bell, VP New Media Group, 227 Broadway, #300, Santa Monica, CA 90401; 310-255-0590, x304; josh.bell@interpretllc.com; www.interpretllc.com. Price: $795.

"2011 PopCap Games Mobile Phone Gaming Research," Information Solutions Group, Carll Frye, Founder, 227 Bellevue Way NE, #300, Bellevue, WA 98004; 425-373-1115; carll@infosolutionsgroup.com; www.infosolutionsgroup.com. Price: Available online at no charge.

The 'Video' In Videogame Consoles

One in five (21%) consumers aged 13 to 54 watch TV programs or movies using a videogame console system at least once a month, according to Knowledge Networks. This includes viewing of DVDs and Blu-ray discs, as well using the system's Internet connection to access streaming or downloadable content.

The research company examines the various ways consumers access TV and movie content outside of standard "live" TV viewing. As with other emerging sources, usage of videogame systems to view video content is far higher among younger viewers than older ones (see table) — a potential harbinger of growing demand for other so-called "over the top" devices.

DVDs still dominate the alternate-to-telecast space by a wide margin, being used at least once a month to watch movies or TV shows by 62% of 13-54 viewers (via set-top disc players, game consoles, or other devices). The next closest formats are DVR, with about half as much usage, and streaming through a PC.

USE OF VIDEOGAME SYSTEMS TO WATCH TV PROGRAMS OR MOVIES, BY AGE

USES CONSOLE AT LEAST ONCE/MONTH TO WATCH VIA...	ALL PERSONS 13-54	13-31	32-45	46-54
DVDs	17%	27%	13%	7%
Blu-ray discs	6%	10%	4%	2%
Streamed/Downloaded video	6%	11%	3%	1%
TOTAL USE	**21%**	**31%**	**17%**	**8%**

SOURCE: Knowledge Networks

SOURCE: Knowledge Networks, Patricia Graham, CMO/EVP, 230 W. Monroe St., #1420, Chicago, IL 60606; 312-416-3660; pgraham@knowledgenetworks.com; www.knowledgenetworks.com.

Total Consumer Spending On Games Flat In 2010

Consumer spending on gaming content — including purchases of new and used physical videogames, along with rentals, subscriptions, digital full-game downloads, social games, downloadable content, and mobile apps — ranged between $15.4 and $15.6 billion in 2010, according to a preliminary estimate by the NPD Group. The total represents sales that are flat to down by as much as 1% when compared to 2009.

Spending on new physical games at retail continues to account for the majority of the total. U.S. retail sales of new physical videogames (including portable, console, and PC game formats) ended 2010 at $10.1 billion, a 5% decline over the $10.6 billion generated in 2009.

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.

PlayStation's Digital Game Sales Gain On Xbox Live Arcade

Sony's PlayStation Network chipped away at Microsoft's lead in digital videogame sales during the second half of last year, with the online network grossing an estimated $49.4 million between July and December of 2010, according to Forecasting & Analyzing Digital Entertainment (FADE).

PlayStation Network posted 40% sales growth during the six month period (compared with 2009), outpacing the concurrent 18% increase at Microsoft's Xbox Live Arcade. The Sony network, which pulled in an estimated $9.3 million in December alone, now counts more than 100,000 monthly users.

The top-selling digital title on PlayStation during the period was Ubisoft's *Scott Pilgrim vs. The World*, for which Sony snagged an exclusive release window, with 190,000 copies sold.

For titles sold via multiple digital platforms, PlayStation is approaching sales parity with Xbox, FADE adds. "In 2009, Microsoft enjoyed a two-to-one sales advantage for multi-platform titles launching simultaneously. Today, that advantage is nearly even with first-month typical sales being 55/45 among new titles [such as] *Costume Quest*, *Pac-Man CE DX*, and *X-Men Arcade*," says FADE's Benjamin Schlichter.

SOURCE: Forecasting and Analyzing Digital Entertainment (FADE), Keith Jackson, Director Business Development, 508-269-7297; kjackson@fadellc.com; www.fadellc.com.

Downloadable Content Popularity Increasing Among Console Gamers

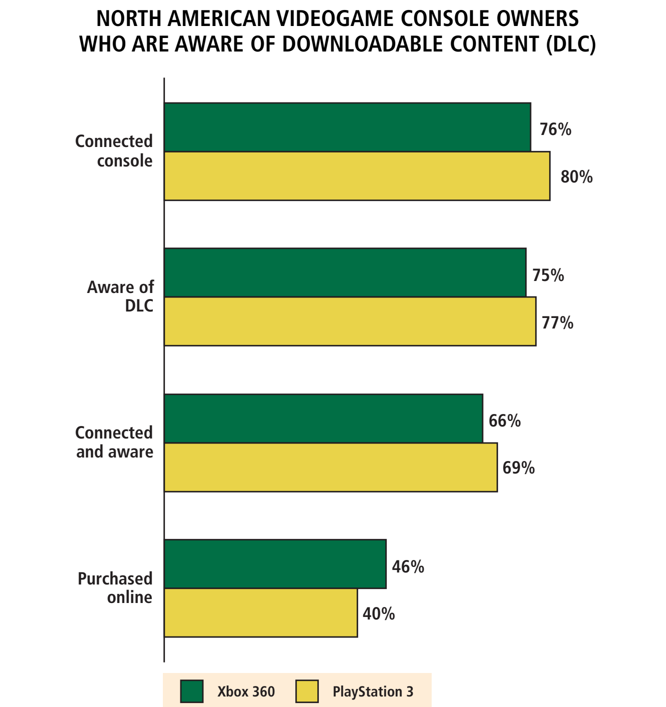
An increasing number of console gamers are purchasing supplemental downloadable content (DLC) for packaged titles, while downloads of full-length games are on the rise as well, according to market research firm EEDAR.

An estimated 14.5 million Xbox 360 gamers — representing 46% of the system's total user base — have purchased DLC such as expansion packs and cheat codes through March 2011, EEDAR reports. In comparison, some 7.8 million PlayStation 3 owners (25% of the total user base) have purchased DLC.

Six in 10 console owners prefer game publishers to release downloadable content for a given title within a month of the title's release, while 30% prefer DLC to be available within three months.

Meanwhile, nearly two-thirds of "core" game fans (64%) own at least one full-length downloadable game, compared to 45% of "casual" game fans and 51% of fans of both genres. The Xbox 360 base leads in downloadable game activity as well, with more than half of console owners purchasing at least one downloadable game in 2010.

Nearly three quarters of those who purchase downloadable games for the PlayStation 3 or Xbox 360 (74%) say they first download a demo of the game "most of the time" or "always."



SOURCE: EEDAR

SOURCE: EEDAR, Geoffrey Zatkin, President/COO, 2075 Corte Del Nogal, #B, Carlsbad CA 92011; 760-579-7100; gzatkin@eedar.com; www.eedar.com.

Wii Consoles Most Likely In Gaming Households' Family Rooms

Roughly half of the latest-generation video- game consoles sit in living/family rooms, according to Nielsen. The system most likely to be found in family rooms is the motion-controlled, social-oriented Nintendo Wii (59%). However, with increasing takeup of motion-control accessories from Microsoft and Sony, the Xbox 360 (currently in 42% of console households' living rooms) and the PlayStation 3 (45%) are both poised to gain living-room share.

The location of videogame consoles within homes is taking on new significance with console makers' addition of video-on-demand and other entertainment options to their online networks. All three of the major consoles, for example, offer connectivity to Netflix's live video streaming; Sony's PlayStation Network also offers free ad-supported streaming of movies and TV series via corporate cousin Crackle.com.

After living/family rooms, kids' bedrooms are the most popular location for game consoles (20% of gaming households). The Xbox 360 is most popular in this space (28%), nearly double the rate of both the PS3 (16%) and Wii (14%).

Nielsen derives the percentages from consumers' claims of TV ownership, location, and console connection in a January 2011 survey.

SOURCE: "Nielsen 360° Gaming Report: U.S. Market," Nielsen, Michael Flamberg, Director Client Consulting, 6255 Sunset Blvd., Los Angeles, CA 90028; 323-817-1597; michael.flamberg@nielsen.com; www.nielsenmedia.com.

Videogames Trump Social Media Among Teens

Eight in 10 teens (80%) use social media, mostly to keep in touch with friends, according to a Harris Interactive study for child sponsorship charity World Vision.

Although use of social media is widespread, more teens would give it up for a day than would give up videogames, TV, sports, cell phones, or computers. Some 72% of teens ages 13-17 spend their free time playing videogames in 2011, up from 63% in 2009.

SOURCE: World Vision, Michele Tvedt, PO Box 9716, Department W, Federal Way, WA 98063; 253-815-1000; mtvedt@worldvision.org; www.worldvision.org.

Gamers Want Action

Action videogames edged out sports and "shooter" titles as the best-selling genre in 2010, according to NPD Group data released by the Entertainment Software Association (ESA).

Action titles comprised 21.7% of all video-game sales in 2010, followed by sports games (16.3%), shooter games (15.9%), and family entertainment titles (9.1%). The burgeoning "casual" game genre comprised 5.2% of sales last year.

Among other videogame market stats:

- 19% of most frequent game players pay to play online games, according to the ESA. Puzzles, board games, game shows, trivia titles, and card games collectively account for most (47%) of the online game market.
- The average videogame player age is 37 —three years older than the average player age in 2010. More than half of the videogame market (53%) is between the ages of 18 and 49.
- Nearly three-quarters of American households (72%) play computer or console videogames, an increase from 67% in 2010.
- Games rated E for Everyone claimed 44% of all 2010 computer and console game sales, followed by M for Mature (24%), T for Teen (19.5%) and Everyone 10+ (12.3%).

SOURCE: Entertainment Software Association, "2011 Sales, Demographic And Usage Data," Dan Hewitt, Senior Director Communications, 575 7th St. NW, #300, Washington, DC 20004; 202-223-2400; dhewitt@theesa.com; www.theesa.com.

Videogame, Movie Ratings Matter Less To Young Parents

Whereas older generations may still view technology with some suspicion (or at least unfamiliarity), today's young moms and dads are just as comfortable with the latest gadgets as their children are. This comfort breeds confidence, according to Ipsos OTX MediaCT.

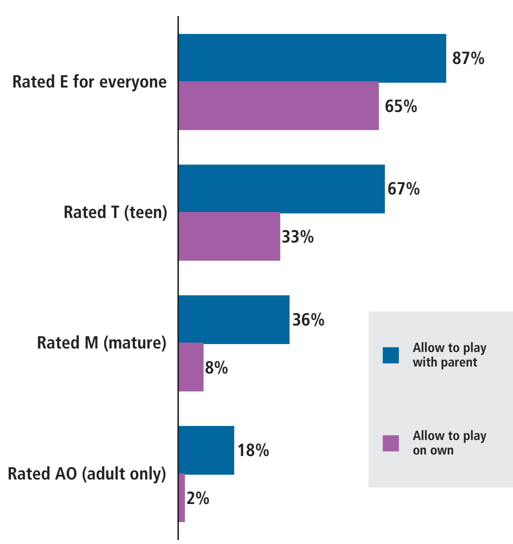
"Parents are now the final arbiter of what's appropriate for their children. They aren't paying attention to traditional guidelines and institutions, such as videogame or movie ratings," says Ipsos OTX MediaCT's Donna Sabino. Parents create their own "fuzzy boundaries," she says. "They appreciate that there are hard-and-fast rules, but that's just not how they make their decisions."

This means today's children are more likely to encounter media and other content that would have traditionally been off-limits to them. One in six parents of boys 9-12 (16%) allow their children to play videogames rated M, such as *Grand Theft Auto* and *Mortal Kombat*, while 51% let them play T-rated games, such as *Final Fantasy* and *World of Warcraft*.

One in four parents (26%) allow their children under age 12 to see PG-13 movies on their own, and 20% take their children to see R-rated movies. Four in 10 children under 12 — 10% of those ages 6-8 — visit social networks that have a minimum age of 13. Furthermore, 79% of parents who allow their kids to join social networks say they are friends with their kids on the sites.

Another influencing factor in children being exposed to older content at a young age is the fact that many parents consume these products alongside their children. More than eight in 10 parents (84%) have played a videogame with their 6-12-year-old children within the past week, according to Ipsos. This may stem from parental preferences as well as parenting philosophy: dads may prefer to play the *Call of Duty* videogame with their sons rather than *Kirby's Epic Yarn*.

PARENTS OF 6-12-YEAR-OLDS WHO ALLOW THEIR CHILDREN TO PLAY VIDEOGAMES, BY RATING

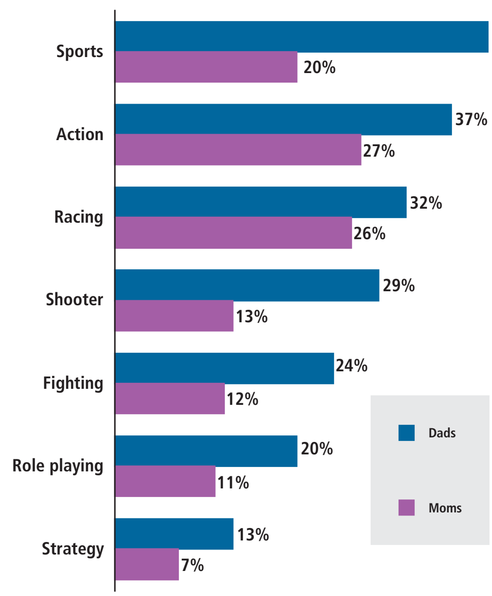


SOURCE: Ipsos OTX MediaCT

Sports, Action Top Family Genres

Three in four dads (73%) who own a console or handheld gaming device play videogames with their kids for at least one hour each week, compared to 38% of moms who play videogames with their children, according to Ipsos OTX MediaCT. The most popular genres dads and their kids play together include sports (41%), action (37%), and racing (32%).

VIDEOGAME GENRES PARENT GAMERS PLAYED WITH THEIR CHILDREN DURING THE PAST WEEK, 2011



SOURCE: Ipsos OTX MediaCT

SOURCE: Ipsos OTX Media CT, Donna Sabino, SVP Kids and Family Insights, 275 Seventh Ave., New York, NY 10001; 212-524-8242; donna.sabino@ipsos.com; www.ipsos.com.

With VOD Services On The Rise, Will Apple Still Dominate?

Apple's iTunes store accounted for nearly two thirds of U.S. electronic sell-through and Internet video-on-demand consumer spending combined in 2010 (64.5%), according to IHS Screen Digest.

While Apple's total market share declined from 74.4% in 2009, the research firm notes that the company's continued dominance coincides with a 60% revenue increase in the overall EST/iVOD movie business during the year.

IHS research director Arash Amel notes that while competing services proliferated in 2010, "iTunes managed to grow because of the introductions of the iPad and the second-generation Apple TV, which have spurred the company's movie rental offerings and have invigorated the iTunes multi-screen ecosystem.

"We expect that in the United States, Apple's strong performance in iVOD will allow it to continue to bypass the video-on-demand services offered by many major cable operators," Amel adds.

Microsoft's Zune video platform claimed the No. 2 spot for EST/iVOD consumer spending in 2010, with a 17.9% share, followed by Sony's PlayStation store (7.2% share).

While the Microsoft and Sony networks — along with Amazon.com's online VOD service —continue to ramp up the competitive pressure on Apple, the most significant rival for iTunes in the medium term could be Walmart, IHS says.

The brick-and-mortar giant's drive for market share for Vudu, its U.S. online movie service, has generated a spike in consumption for the service starting in the fourth quarter of 2010. The service has offered $0.99 promotional pricing on iVOD rentals, and has added support for a wider range of devices, including Sony's PlayStation 3.

"The future of the online movie business may come down to a competitive battle between Apple and Walmart," Amel says. "Although Walmart is not on the charts yet, the company soon will become a major player if its current momentum continues. The company already represents a critical source of revenue for the major Hollywood studios because of its massive sales of Blu-ray and DVD movies—and now is expanding this business into the online realm."

Walmart generated more than $3.5 billion in revenues for movie studios from sales of physical discs in 2010, according to IHS.

U.S. MOVIE ELECTRONIC SELL-THROUGH AND INTERNET VIDEO-ON-DEMAND MARKET SHARE, 2009-2010

Ranking By Percentage Of Total Consumer Spending

COMPANY	2009	2010
Apple	74.4%	64.5%
Microsoft	11.6%	17.9%
Sony	5.7%	7.2%
Others	8.3%	10.4%

SOURCE: IHS Screen Digest

SOURCE: IHS Screen Digest, Arash Amel, Research Director Digital Media, 1700 E. Walnut Ave., #600, El Segundo, CA 90245; 310-524-4007; analystinquiry@isuppli.com; www.isuppli.com.

Movies-on-Demand Market Yet To Crack $1 Billion

An average of 38 million set-top boxes per month accessed video-on-demand content in 2010, an 11% increase over 2009, according to research firm Rentrak. Yet 74% of all VOD transactions were for free programming.

Still, VOD represents a growing revenue stream for content owners: the movies-on-demand business, Rentrak says, rose 9.1% to nearly $1 billion in revenue last year.

Among free on-demand categories, music, children's, and television programming remain the most popular, with TV entertainment increasing the most during 2010 (31%).

Fewer than half of all VOD-enabled set-top boxes (44%) access on-demand services in an average month, according to Rentrak. VOD users, in contrast, had an average of 17.1 transactions per month in 2010.

The proportions of free content, paid transactions, and subscription services in 2010 is similar to the contours of the VOD market in 2009, as is the percentage of VOD-enabled households that use VOD services.

SOURCE: Rentrak, Carol Hinnant, SVP Business Development, The Chrysler Building, 405 Lexington Ave., 26th Fl., New York, NY 10174; 212.541.2480; www.rentrak.com.

Nearly One Quarter Of Adults Use Video-On-Demand

Nearly two-thirds of U.S. adults (62%) have either never heard of video-on-demand, never used it, or are unable to access VOD services, according to a Centris Research survey of some 40,000 people.

Nearly one quarter of respondents (24%) have used either free or transactional VOD in the past month. That percentage is slightly higher than a year-end 2010 estimate by DEG: The Digital Entertainment Group, which puts VOD market penetration at about 20%.

SOURCE: Centris, Bill Beaumont, President, 565 Virginia Dr., Fort Washington, PA 19034; 800-336-7674; www.centris.com.

DEG: Digital Entertainment Group, Lyndsey Schaefer, Director Executive Staff, 10635 Santa Monica Blvd., #160, Los Angeles, CA 90025; 424-248-3811; schaefer@degonline.org; www.degonline.org.

Kids' Goods Comprise 80% Of Entertainment/Character Licensing Market In U.S., Canada

Sister publication The Licensing Letter estimates that 80% of retail sales of licensed entertainment/character merchandise in the U.S. and Canada is for children's goods. "Children" for this purpose is defined as newborn to 13 years old. The U.S. and Canada together account for 41% of global Entertainment/Character licensing for all ages.

Children's goods dominate entertainment/character licensing worldwide, with Russia, Israel, and South Africa at the highest end of the spectrum, and Greater China, South Korea, and Japan the only markets where children's merchandise accounts for less than 80%.

As discussed in "International Licensing: A Status Report," TLL's study of global licensed merchandise sales and trends (www.epmcom.com/intl), entertainment/character licensing overall tends to be dominant in less mature licensing territories, where fashion, trademark/brand, and the major U.S. sports leagues are less developed or familiar.

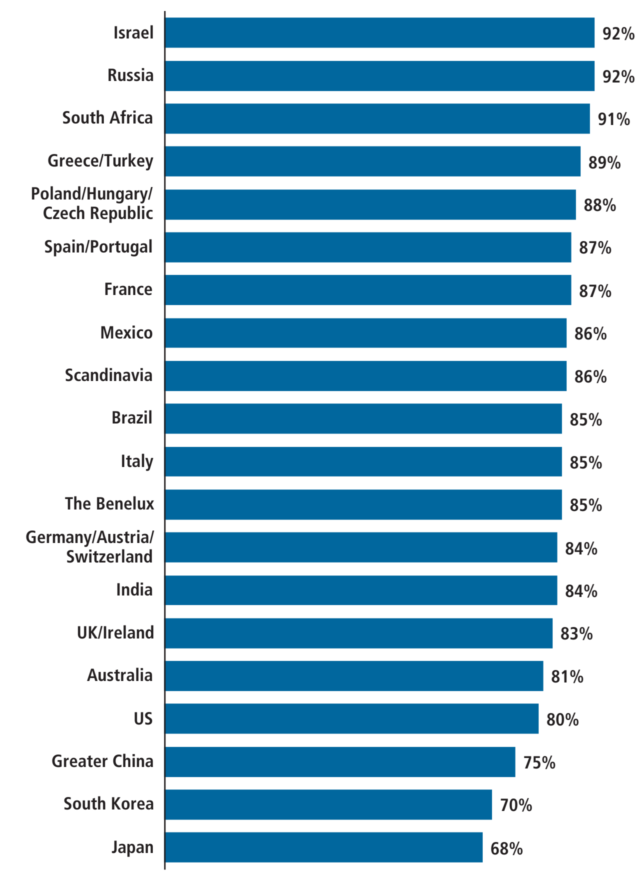
The exceptions are mature markets that have strong animation, videogame, and anime/manga industries, such as Japan and South Korea. In those markets, entertainmentcharacter is the largest single licensing sector — but more of the licensed merchandise is geared toward teens and young males, and in some instances young women.

As a result, while Japan represents 16% of worldwide retail sales of licensed entertainment/ character merchandise, and entertainment/ character properties account for 39% of retail sales in that country, Japan has the lowest stake in children's Entertainment/Character licensing of any territory TLL measured.

By contrast, the third largest market for entertainment/ character licensing is the UK/Ireland. This territory accounts for 6% of the worldwide entertainment/character market, and for 22% of sales of licensed merchandise in those countries. But the strength of preschool and children's television properties there, many with strong publishing programs, mean that the children's portion of entertainment/ character licensing there is 83%.

SOURCE: The Licensing Letter, Ira Mayer, Executive Editor, 19 W. 21st St., #303, New York, NY 10010; 212-941-1633 x27; imayer@epmcom.com; www.epmcom.com.

SHARE OF RETAIL SALES OF LICENSED ENTERTAINMENT/CHARACTER MERCHANDISE FOR CHILDREN, WORLDWIDE, BY TERRITORY, 2010

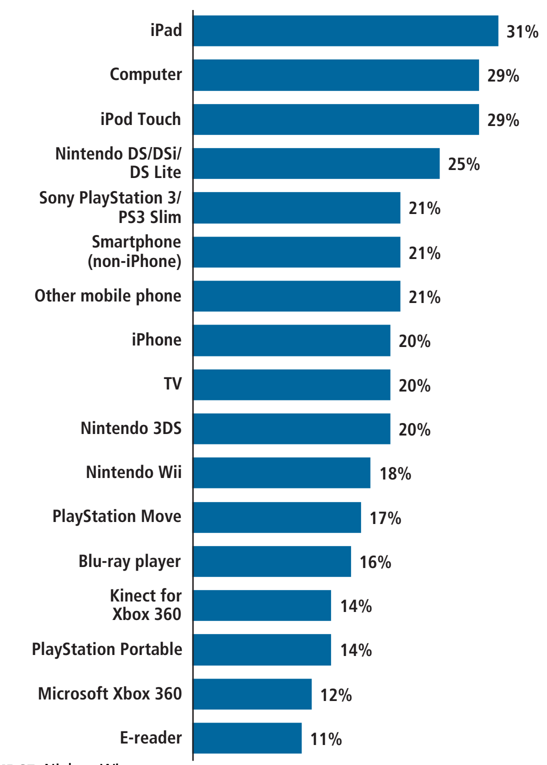


SOURCE: The Licensing Letter

iPad Tops Kids Wish List

Three in 10 kids 6-12 (31%) expect to have their own iPad within six months, according to Nielsen. This age group also

PRODUCTS 6-12-YEAR-OLDS EXPECT TO OBTAIN WITHIN SIX MONTHS



SOURCE: Nielsen Wire

expects to obtain a new computer (29%), iPod Touch (29%), and Nintendo DS (25%). They show less interest (or perhaps already own) an e-reader (11%) or Microsoft Xbox 360 (12%).

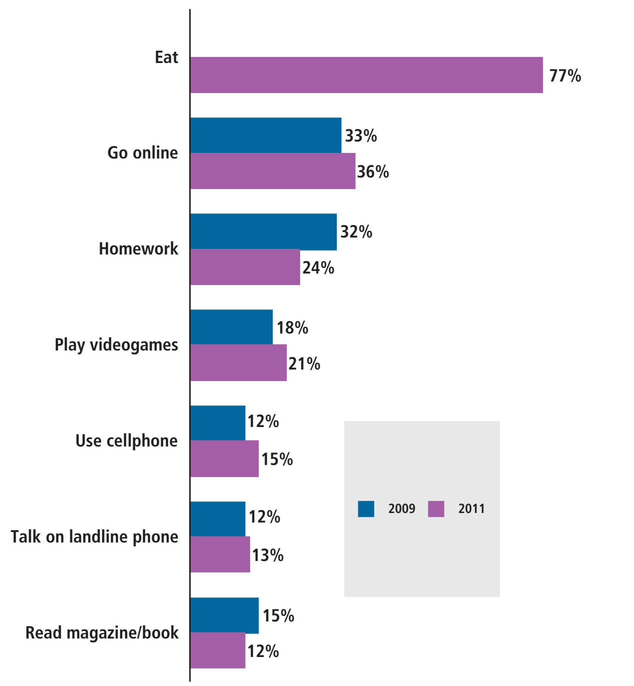
SOURCE: Nielsen Wire, Chris Quick, Client Services Manager, Mobile Media, 770 Broadway, 14th Fl., New York, NY 10003; 646-654-5000; nielsenwire@nielsen.com; www.nielsen.com.

Kids Eat, Go Online While Watching TV

Nearly half of the time children ages 6-12 (40%) spend in front of screens is spent watching live TV, according to Ipsos OTX MediaCT. They spend 5.3 hours each day — including simultaneous usage — with media activities such as playing videogames, surfing the Internet, and using cellphones.

Eating (77%) and going online are the top activities children ages 6-12 do while watching TV. Among children who use the computer while watching TV, 61% are playing games by themselves, 32% are visiting websites, 30% are browsing social networks, 25% are playing games with others, and 22% are using personal email.

ACTIVITIES CHILDREN 6-12 DO WHILE WATCHING TV, 2009 VS. 2011



NOTE: Survey did not ask about food consumption in 2009.

SOURCE: Ipsos OTX MediaCT

SOURCE: Ipsos OTX Media CT, Donna Sabino, SVP Kids & Family Insights, 275 Seventh Ave., New York, NY 10001; 212-524-8242; donna.sabino@ipsos.com; www.ipsos.com.

Ages Seven, Eight Represent Key Media, Technology Turning Point

Children largely expand their digital media habits at ages seven and eight, according to Sesame Workshop and the Joan Ganz Cooney Center. Their media habits shift from being primarily TV-centric to encompassing numerous devices, including handheld videogames, portable music players, computers, and cellphones.

About 20% of 4-5-year-olds use handheld videogames, compared to 46% of seven-year-olds. Fewer than half of six-year-olds use the Internet on a particular day, compared to 67% of eight-year-olds. Twice as many eight-year-olds as six-year-olds have their own TV in their bedroom (59% vs. 30%).

Cellphone ownership grows from 2% among 4-5-year-olds to 31% among 8-10-year-olds. However, these cellphone owners aren't heavy users. The average nine-year-olds spends 10 minutes talking and 20 minutes consuming media, such as games or music, each day.

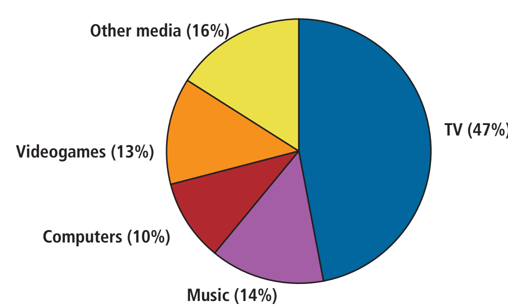
As children grow older, they also age out of certain behaviors and habits. Half of children under five use an electronic toy, compared to 33% of 6-8-year-olds and 13% of 9-11-year-olds. Public TV accounts for 13% of morning TV viewing among those under age five, and after that, their viewing begins to decline; as they age they turn to cable networks.

All children still largely exhibit traditional viewing habits, with TV as the dominant medium. During the week they spend three hours a day in front of a TV set and four hours during the weekend. TV is so popular that 48% of homes leave it on even when no one is watching it.

Digital Divide

There's a growing divide among children in regards to their access to technology. While older technologies such as TVs, VCRs, and DVDs, are universal in families regardless of income level or ethnic background, there are notable exceptions with Internet access and cellphones. Three in four white children have cellphones (76%) compared to 66% of Hispanic and 63% of Black children. Minority tween cellphone owners spend more time talking, texting, and using media on their phones than their White peers.

TIME CHILDREN UNDER 12 SPEND WITH MEDIA EACH DAY



SOURCES: Sesame Workshop, Joan Ganz Cooney Center

Three in four White children (75%) have home Internet access, compared to 62% of Hispanic and Black children; 60% of White and Black children age 5-9 use the Internet on a typical weekday, compared to 45% of Hispanic children. Black children spend more time online per session (41 minutes) than their White peers (27 minutes).

Half of children living in households earning more than $75,000 have wireless handheld devices, compared to 8% from families earning less than $25,000. High-income families are more than three times as likely as low income households to own an Internet-equipped cellphone (32% vs. 8%). Handheld videogames are a notable exception. Roughly the same percentage of children possess one of these devices whether their family income is less than $25,000 or more than $75,000.

Once lower-income or ethnic-minority families are given technology, their children are likely to use it, if not more so, with Internet usage as the sole exception.

Children's Internet usage differs depending on race/ethnicity and socio-economic background. Children from higher-income families tend to use computers for creative endeavors such as making videos, whereas children from lower-income families are more likely to play videogames.

SOURCESS: Joan Ganz Cooney Center, Michael Levine, Executive Director, One Lincoln Plz., New York, NY 10023; 212-875-6510; michael.levine@sesameworkshop.org; www.sesameworkshop.org.

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

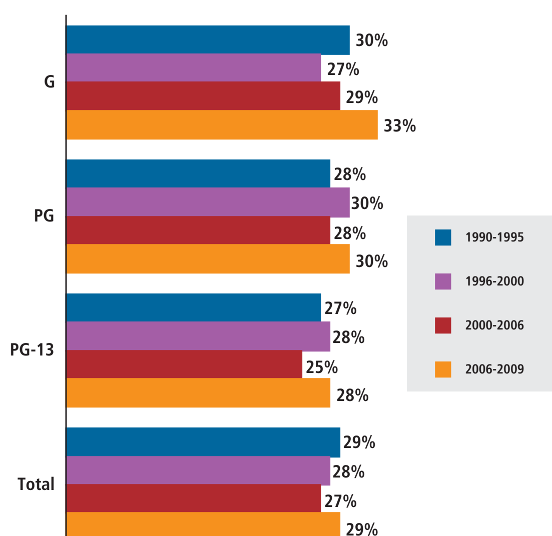
Boys Dominate Kid-Geared Films

Only three in 10 speaking characters (29%) appearing in G, PG, and PG-13 movies are female, according to a study conducted by the See Jane program, which seeks to reduce gender stereotypes in media aimed at children age 0-11. The study cites the primary reasons for the lack of female speaking characters as the male-dominated nature of the movie industry, the male target audience, and that men ticket buyers resist female stories.

Half of industry executives (50%) admit that it would be "not at all" difficult to feature more female characters, though 54% also say the gender balance must be appropriate for the story. Six in 10 industry executives (59%) feel there would be no financial repercussions if a cast were more balanced, with 30% feeling it would help increase profits.

SOURCE: See Jane Program, Dads and Daughters, Stacy Smith, Associate Professor, University of Southern California; 213-740-3951; stacysmi@usc.edu; www.dadsanddaughters.org

PERCENTAGE OF FEMALE SPEAKING CHARACTERS IN G, PG, PG-13-RATED FILMS



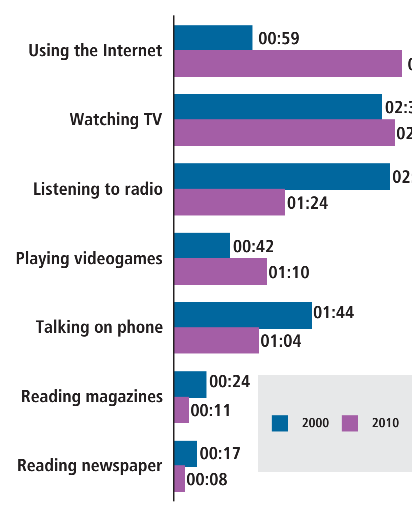
SOURCE: See Jane program

12-24-Year-Olds' Music Tastes Shift To Internet, Away From Radio, TV

There are twice as many radio listeners age 12-24 listening to Top 40/pop stations in 2010 as in 2000, while half as many are tuning into alternative rock stations, according to Arbitron and Edison Research. The report examines teen and young adult habits from 2000 and 2010 to find Internet usage has replaced radio listening. Time spent listening to over-the-air radio is down from two hours and 43 minutes in 2000 to one hour and 24 minutes today.

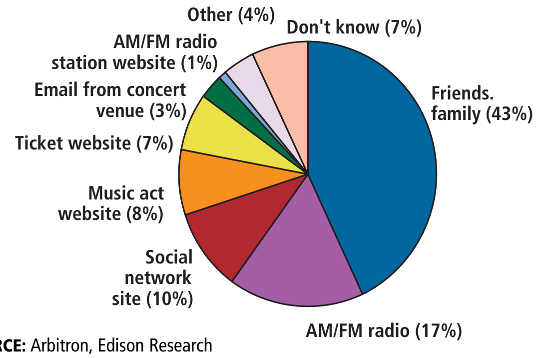
While teens may be listening to the radio less frequently, radio remains the top source for how teens learn about new music (51%), followed by friends (46%), YouTube (31%), and music video channels (23%). Fewer than two in 10 learn about new music featured on TV shows (18%), through appearances on TV shows (17%), and via social networking sites (16%).

TIME SPENT PER DAY ON SELECT MEDIA BY 12-24-YEAR-OLDS, 2000 VS. 2010



SOURCE: Arbitron, Edison Research

HOW TEENS LEARN ABOUT UPCOMING CONCERTS, 2010



SOURCE: Arbitron, Edison Research

Unfortunately for the concert biz, teens are attending fewer events. Only 12% have attended more than two concerts in the last year, compared to 24% who said the same in 2000. Almost two in three (64%) have not attended a single concert during the past year, compared to 43% in 2000.

CD purchases have dropped 62% over the past decade. Teens and young adults purchased an average 3.4 CDs a year in 2010, compared to 11.3 in 2000; 7% admit they download music illegally at least once a week.

SOURCES: Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriguez@arbitron.com; www.arbitron.com.

Edison Research, Tom Webster, VP, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; twebster@edisonresearch.com; www.edisonresearch.com.

Teens Are Key Earphone Purchasers

Four in 10 teens 13-17 (41%) have purchased new headphones within the past three months, according to the NPD Group. Adults tend to buy one every 14 months. Teens are twice as likely as adults to say they plan to purchase new headphones within the next year.

Music artist endorsements, most notably Dr. Dre and Justin Bieber, are extremely influential in enticing new headphone purchases. These endorsements rank highest with headphones under $20 and over $100.

SOURCE: NPD Group, Ross Rubin, Executive Director, Industry Analysis, 250 Park Ave., S, 7th Fl., New York, NY 10003; 212-515-8777; ross_rubin@npd.com; www.npd.com.

Apple Brands Reign Among Teens

The proportion of high school students who downloaded music online dropped to 77% in spring 2011 from 82% in 2007, according to Piper Jaffray's biannual "Taking Stock With Teens" survey. The proportion who admitted to using peer-to-peer networks remained about the same (65%).

Apple's iPod and iTunes remain the dominant music brands. The vast majority of teens (86%) own an iPod of some variety, and 95% use iTunes, up from 79% in 2007.

Apple's iPhone is also becoming a popular teen accessory, with a teen market share of 17%; 37% of teens who don't already own iPhones intend to purchase them in the next six months.

Netflix is also popular with teens, with 63% using the service in spring 2011, up from 42% in 2009.

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.

Harry Potter Is College Students' Top Book

Harry Potter is the most popular book to read for pleasure among college students, according to Anderson Analytics. *Twilight* ranks second among all students, though it's the top choice for women. Stieg Larsson's Millennium Trilogy, which includes *The Girl With The Dragon Tattoo*, comes in at number five for the first time. Previous top titles, such as Dan Brown's *Angels & Demons* and *The Da Vinci Code*, and the *Bible* fall out of the top five.

FAVORITE BOOKS AMONG COLLEGE STUDENTS, BY GENDER

Boys	Girls
1. Harry Potter	1. Twilight
2. Lord of the Rings	2. Harry Potter
3. World War Z	3. Eat Pray Love
4. 1984	4. The Last Song
5. The Lost Symbol	5. Stieg Larsson books

SOURCE: Anderson Analytics

SOURCE: Anderson Analytics, Tom Anderson, Managing Partner, Two Stamford Landing, 68 Southfield Ave., #100, Stamford, CT 06902; 203-912-7175; toma@andersonanalytics.com; www.andersonanalytics.com.

E-Readers Experience Growth Among College Kids

One in six college students (15%) own an e-reader, up from 8% in October 2010, according to OnCampus Research, the research division of the National Association of College Stores. Among those who own e-readers, Amazon Kindle is the most popular (52%), followed by Barnes & Noble's Nook (21%), Apple's iPhone (17%), and Apple's iPad (10%).

The iPad and Kindle (27% each) are the two brands students who don't currently own an e-reader are most interested in purchasing. Despite the growth of e-readers on campus, 75% of college students prefer to read books in print rather than electronically.

SOURCE: OnCampus Research, National Association of College Stores, Julie Traylor, Chief Planning and Research, 500 E. Lorain St., Oberlin, OH 44074; 800-622-7498, x2217; jtraylor@nacs.org; www.nacs.org.

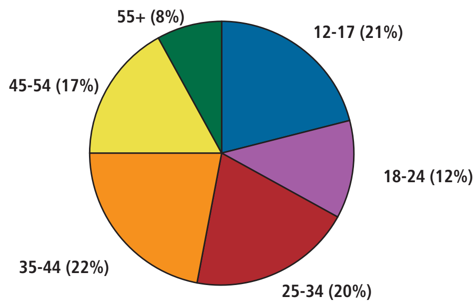
Teen Podcast Listeners Decline

The number of teens who listen to podcasts declined from 21% in 2006 to 10% in 2010, according to Arbitron and Edison Research. Podcast listeners among young adults ages 18-24 grew during the same time frame from 12% to 16%.

Two in three young podcast listeners (64%) do not subscribe to any podcast shows, while 14% subscribe to one, 8% to two, and 13% to at least three different programs. The majority of those who listen to podcasts do so either by computer/iTunes (42%) or websites/YouTube (35%). Fewer than one in 10 listen to podcasts automatically loaded to a portable player (6%) or dedicated mobile app (6%).

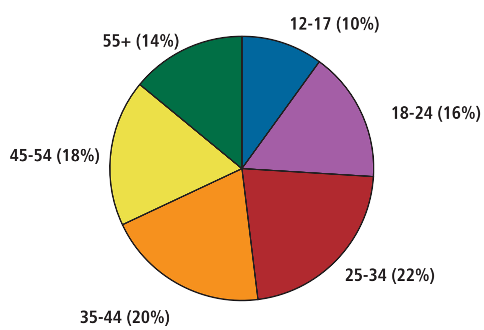
Teens and young adults learn about new podcasts primarily through the iTunes Directory (32%) or through a social network recommendation (20%). Some 13% learn about podcasts via search engines and 7% receive recommendations on blogs.

DEMOGRAPHICS OF PODCAST LISTENER, 2006



SOURCES: Arbitron, Edison Research

DEMOGRAPHICS OF PODCAST LISTENER, 2010



SOURCES: Arbitron, Edison Research

SOURCES: Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriguez@arbitron.com; www.arbitron.com.

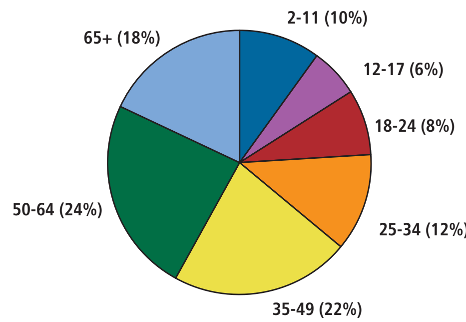
Edison Research, Tom Webster, VP, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; twebster@edisonresearch.com; www.edisonresearch.com.

Teens Are Age Group Least Likely To Watch TV

Some 10% of all television viewed in Q2 2010 was seen by 2-11-year-olds and 6% was seen by 12-17-year-olds, according to Nielsen. Teens comprise the lowest overall viewing demographic, though overall viewership increases with each older age group.

Both children aged 2-11 and teens 12-17 primarily spend their time each month watching traditional TV rather than time-shifted or DVR playback.

AGE BREAKDOWN OF TV VIEWING AUDIENCE



SOURCE: Nielsen

MONTHLY TIME SPENT USING VARIOUS MEDIA, IN HOURS/MINUTES, 2Q 2010

	2-11	12-17	18-24	25-34
Traditional TV	107:32	103:46	113:54	130:21
Timeshifted TV	6:49	6:01	6:56	12:52
DVR Playback (in homes with service)	16:13	15:50	19:30	29:29

SOURCE: Nielsen

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.

factoids

- ➤ More than seven in 10 women (73%) who work in professional or managerial jobs and have annual household incomes of $100,000 or more **read newspapers** in printed form. *(Newspaper Association of America; phone: 571-366-1000)*
- ➤ More than a third of Americans age 12 and older (34%) have listened to **online radio** in the past month. *(Arbitron; phone: 410-312-8500)*
- ➤ Affluent adults (with household incomes of $100,000 or more) spend 18 hours a week **watching TV**, compared to 34 hours a week spent by members of the general population. *(Interactive Advetrising Bureau; phone: 212-380-4700)*
- ➤ More than one in 10 households (13%) with **pay-TV service** (cable or satellite) have recently downgraded their plans; another 9% plan to do so. *(Parks Associates; phone: 972-490-1113)*
- ➤ Eight in 10 adults who spent $500 or more on business clothes in the past year (80%) habitually read **newspapers** (in print or online). *(Newspaper Association of America; phone: 571-366-1088)*
- ➤ Sales of **print books** dropped 10% to 307.1 million units in the first six months of 2011. *(Nielsen BookScan; phone: 646-654-5000)*
- ➤ More than three quarters (78%) of consumers' **home video** spending goes toward DVD or Blu-ray rentals or purchases. *(NPD Group; phone: 516-625-0700)*
- ➤ In a typical week, 85% of adults with at least some post-graduate education read **newspapers** in print or online. *(Newspaper Association of America; phone: 571-366-1000)*
- ➤ Netflix is the largest source of **Internet traffic**, consuming 30% of peak downstream traffic. *(Sandvine; phone: 519-880-2232)*
- ➤ Music fans attend an average of 1.5 live **concerts** per year. *(Live Nation; phone: 800-433-3061)*
- ➤ Sales of **audio CDs** dropped 9% between May 2010 and May 2011. (Billboard*; phone: 212-536-5336)*
- ➤ More than three quarters (77%) of consumers have watched **movies** on DVD or Blu-ray in the past three months. *(NPD Group; phone: 516-625-0700)*
- ➤

AMERICANS WHO ARE GOING OUT LESS OFTEN, 2009

Fine dining patrons	66%
Nightclub goers	65%
Casino and resort visitors	59%
Bar patrons	55%
Casual Dining patrons	52%

SOURCE: Nielsen; phone: 646-654-5000

FAST FACT:

Women's Favorite Segments On Morning Talk Shows

Nearly three in four women (72%) watch a morning show of some kind, according to MedeliaMonitor. Mothers are slightly more likely than those without kids to watch these shows, but whether a woman works does not affect her morning TV habits. When does she start watching?

WOMEN'S FAVORITE SEGMENTS ON MORNING TALK SHOWS

Local news	54%
National news	53%
Local weather	49%
Health segments	37%
Special interest/personal stories	37%
Cooking/food	32%
Celebrity/entertainment stories	24%
Shopping segments	21%
Parenting segments	19%
Money/finance segments	17%
International news	16%
National weather	7%

SOURCE: MedeliaMonitor

- ➤ Americans bought 1.16 billion **digital music** tracks in 2010, up 2% from 2009. [MUSIC] *(Recording Industry Association of America; phone: 202-775-0101)*
- ➤ Netflix accounts for 20% of all **movie downloading** in North America. *(Arbor Networks; phone: 978-703-6600)*
- ➤ The number of U.S. households that own **televisions** is projected to drop from 115.9 million (98.9%) in 2011 to 114.7 million (96.7%) in 2012. *(Nielsen; phone: 646-654-5000)*
- ➤ Nearly four in 10 **underage shoppers** (38%) are able to buy R-rated DVDs without being asked for ID. *(Federal Trade Commission; phone: 202-326-2222)*
- ➤ More than a third of those who go to the movies regularly (36%) — defined as those who have seen three or more movies in a theater in the prior six months — have streamed a full-length **movie online**, up 16% over 2009. *(Interpret; phone: 310-255-0590, x346)*
- ➤ More than a quarter of Internet radio listeners (27%) discover **new music** by hearing it on television. *(TargetSpot; phone: 212-631-0500)*
- ➤ Nearly two thirds of Americans age 55 and older (64%) have watched **TV shows** on the Internet. *(Harris Interactive; phone: 585-272-8400)*
- ➤ Two in 10 fans of ***Star Trek*** (19%) say the series has helped them identify and manage difficult situations in their lives. *(Daryl Frazetti, Professor of Anthropology, California State University Channel Islands; phone: 805-437-8400; daryl.frazetti@csuci.edu)*

- ➤ Four in 10 **television sets** (40%) in the U.S are HDTVs. *(Consumer Electronics Association; phone: 703-907-7600)*
- ➤ Lesbian/gay/bisexual/transgender (LGBT) characters made up 4% of regularly appearing characters on scripted broadcast **television shows** in the 2010-2011 season, an all-time high. *(Gay & Lesbian Alliance Against Defamation; phone: 323-933-2240)*
- ➤ Fewer than one fifth of **DVR owners** (18%) who fast-forward through ads remember the ads, compared to 29% of those who don't use DVRs. *(YuMe; phone: 650-591-9400)*

environment

American consumers want to help the environment — but only if it doesn't cost them too much. Residents of the U.S. and Canada are about half as likely as global consumers overall to say they're willing to pay extra for environmentally friendly products.

Price seems to be a deciding factor. About half of U.S. consumers say they prefer to buy green products but when push comes to shove they tend to buy whatever's cheapest. The "greenest" consumers are also among the most affluent and highly educated.

There's also confusion over what green means; the majority of consumers wish companies would communicate more clearly about their products' environmental benefits.

There's more than one kind of price to be paid; more Americans would prioritize economic growth over protecting the environment than vice-versa.

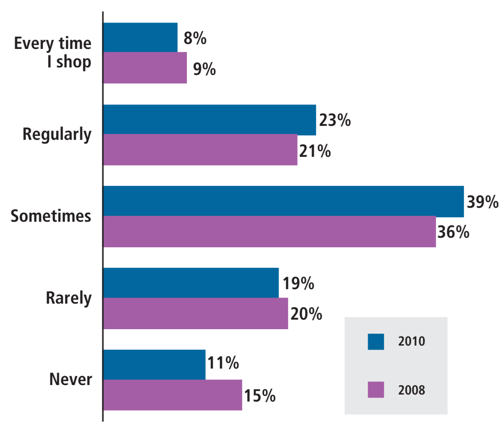
"Green" Is Important But Unclear

Seven in 10 U.S. consumers sometimes or always take environmental impact into consideration when making purchase decisions, according to Cone. There's a great deal of confusion surrounding the terminology used to describe environmentally friendly products, however.

Nearly eight in 10 (79%) Americans want companies to provide more information about the environmental impact of their products on the packaging. Three quarters (75%) wish companies would be clearer and help consumers understand the environmental terms they use to describe products and services.

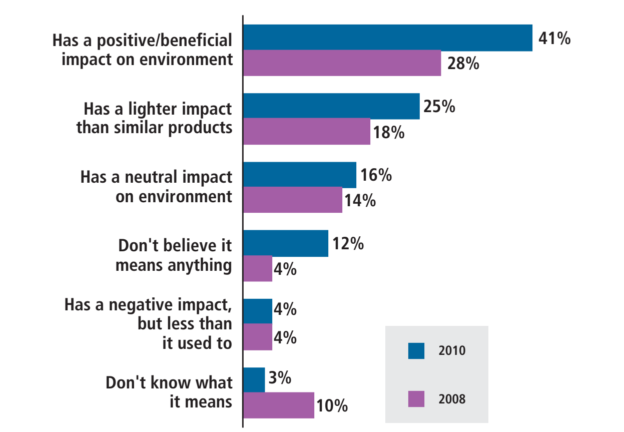
Although most consumers (97%) believe they understand what environmental marketing terms such as "green" or "environmentally friendly" mean, only 29% know that they refer to products with lower environmental impacts than comparable alternatives. Four in 10 (41%) mistakenly think such products actively improve the environment.

HOW OFTEN U.S. CONSUMERS CONSIDER ENVIRONMENTAL IMPACT OF PURCHASES



SOURCE: Cone Inc.

WHAT U.S. CONSUMERS THINK "GREEN" OR "ENVIRONMENTALLY FRIENDLY" MEANS IN PRODUCT ADS/LABELS



SOURCE: Cone Inc.

Nearly a quarter of consumers (23%) believe it's never acceptable for companies to make vague claims about products' environmental impact, while 59% say such claims are acceptable only when they're backed up with additional details.

Consumers don't demand environmental perfection of companies, but they're unforgiving of deception. Fewer than half (43%) trust companies to tell the truth about their environmental practices, down from 47% in 2008.

Once lost, that trust is hard to win back — 71% will stop buying a product that doesn't live up to its environmental claims, and of these, 37% will stop buying the company's products entirely.

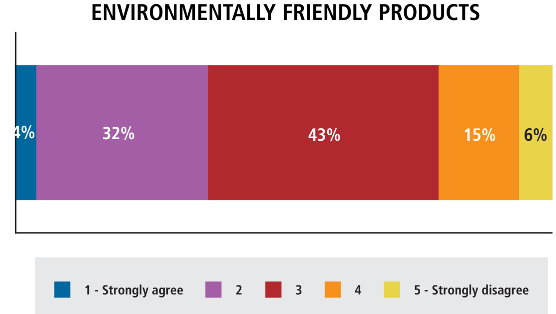
SOURCE: "2011 Cone Green Gap Trend Tracker," Cone Inc., Jonathan Yohannan, SVP of Corporate Responsibility, 855 Boylston St., Boston, MA 02166; 617-227-2111; jyohannan@coneinc.com; www.coneinc.com. Price: This study is available online at no charge.

Consumers Buy Green – When Price Is Right

More than a third of shoppers (36%) — 41% of those ages 18-34 — say they would pay more for products that are environmentally friendly, but the majority will only do so when it's convenient and cost-effective, according to The Integer Group and M/A/R/C Research.

More than eight in 10 (82%) turn off lights they're not using, and two thirds recycle, but fewer than half go to the extra effort of buying locally grown foods, unplugging electrical items they're not using, or buying locally made or used items. Fewer than a quarter are willing to give up their private cars by using public transportation, carpooling, bicycling, or walking. In general, shoppers' top priorities are quality (50%) and price (47%), and environmentally friendly products must also meet these criteria.

CONSUMERS WHO ARE WILLING TO PAY MORE FOR ENVIRONMENTALLY FRIENDLY PRODUCTS



SOURCES: The Integer Group and M/A/R/C Research

SOURCES: "The Checkout: Issue 2.11 – Green Report, March 2011," The Integer Group and M/A/R/C Research. The Integer Group, Mark McMullen, VP Business Development, 7245 W. Alaska Dr., Lakewood, CO 80226; 303-393-3000; shopperculture@integer.com; www.integer.com. Download (with registration) available at www.shopperculture.com. M/A/R/C Research, Scott Waller, VP Client Development, 1660 N. Westridge Cir., Irving, TX 75038; 972-983-0142; marketing@marcresearch.com; www.marcresearch.com

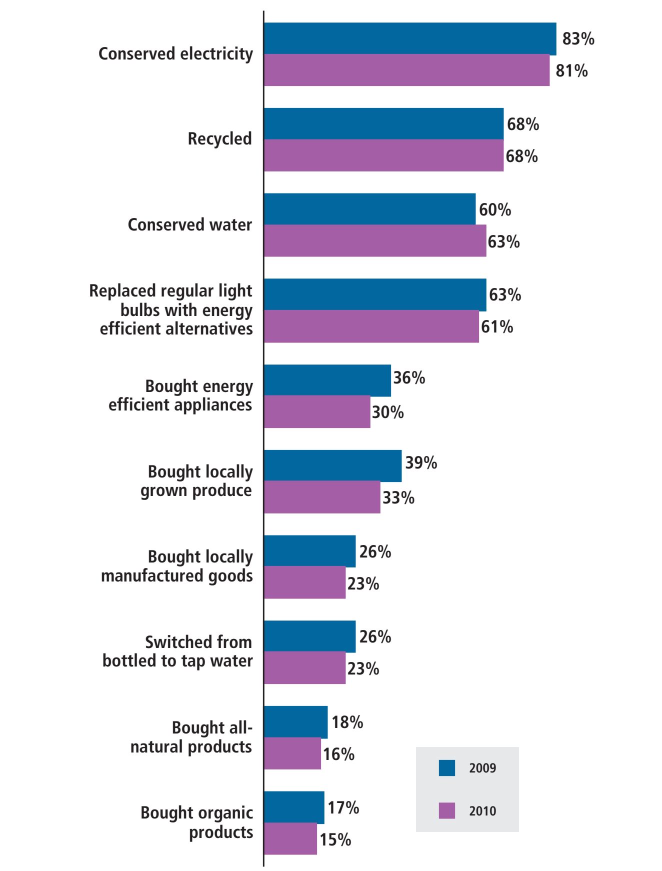
The Green Fad Fades: Eco-Friendly Is Less Important To Consumers

Americans are not only abandoning eco-friendly habits — such as conserving electricity and water and recycling — they are also relinquishing eco-friendly shopping behaviors, according to Harris Interactive.

Nearly three in 10 (29%) described themselves as environmentally conscious in 2010, similar to the 30% who said so in 2009. Some 27% claimed that environmental issues impact their purchase decisions, similar to the 26% who said so in 2009.

However, their actions suggest they are not as concerned about the environment as they were in prior years. Fewer are buying locally grown, natural, or organic products. They are also less likely to buy energy efficient appliances and replace regular light bulbs with energy-efficient alternatives.

ENVIRONMENTALLY FRIENDLY BEHAVIORS CONSUMERS HAVE ENGAGED IN, 2009 VS. 2010



SOURCE: Harris Interactive

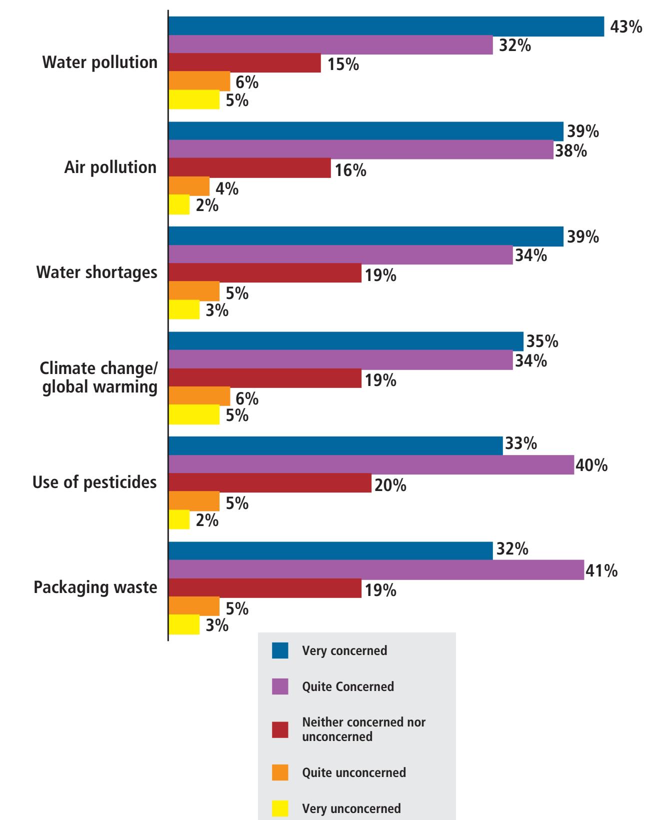
SOURCE: "Fewer Americans 'Going Green,'" Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

Consumers Like Environmentally Friendly Products But Won't Pay Extra For Them

Only about one in 10 North American consumers (12% of U.S. and Canadian residents) are willing to pay extra for environmentally friendly goods, compared to 22% of global consumers, according to Nielsen. Almost half (48%) of North Americans say they prefer to buy eco-friendly products but tend to put that aside and buy whatever's cheapest.

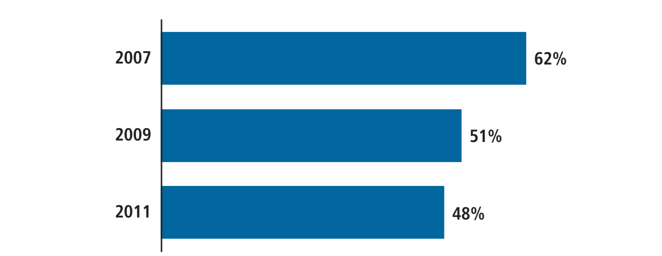
Almost two thirds of global consumers (64%) think organic products are better for the environment, but only 49% of North Americans think so. North American consumers are

GLOBAL CONSUMERS' LEVEL OF CONCERN ABOUT ENVIRONMENTAL ISSUES



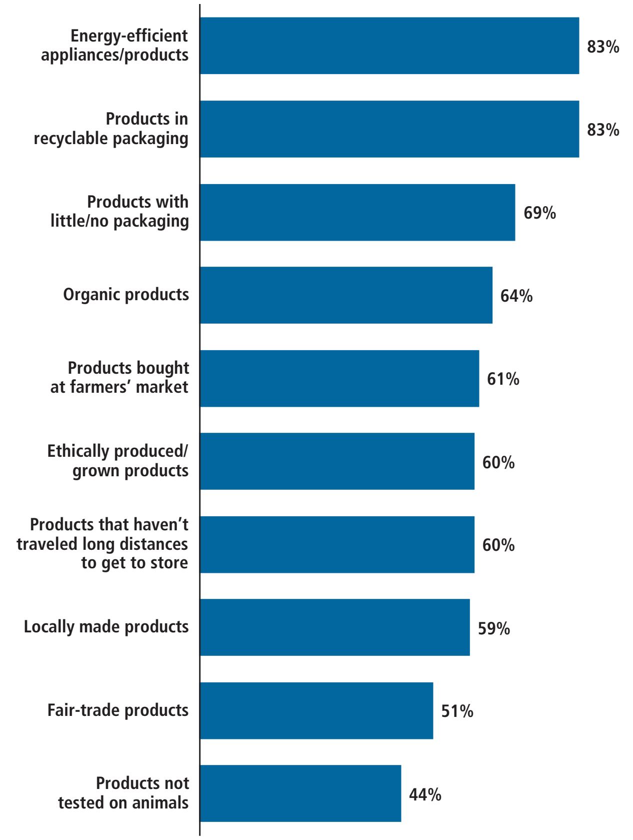
SOURCE: Nielsen

U.S. RESIDENTS WHO ARE/WERE CONCERNED ABOUT CLIMATE CHANGE, 2007-2011



SOURCE: Nielsen

PRODUCTS GLOBAL CONSUMERS BELIEVE HAVE A POSITIVE IMPACT ON THE ENVIRONMENT



SOURCE: Nielsen

more likely than residents of other countries to consider buying locally grown/produced products to be environmentally beneficial (65% vs. 59% of global consumers).

Residents of North America are less likely than those of other regions to be concerned about global warming. People who live in countries with extensive coastlines such as Portugal, Mexico, and Thailand are most likely to be concerned.

Among U.S. residents who say they're not concerned, 63% think climate change is caused by natural variation, not human actions. Globally, those who are not concerned about climate change tend to cite other, more pressing concerns as their chief reason.

SOURCE: "Sustainable Efforts & Environmental Concerns Around the World, August 2011," Nielsen, Jennifer Frighetto, Retail/Manufacturing/CPG, 770 Broadway, New York, NY 10003; 847-605-5686; jennifer.frighetto@nielsen.com; www.nielsen.com

"Super Green" Consumers Outspend Others

"Super Green" consumers — those who participate in 10 or more environmentally friendly activities on a regular basis — comprise only 5% of the population, but their consumer impact is significant, according to Scarborough Research. They're high-income, highly educated, and spend well above average in all retail categories, including household and luxury items.

They're 76% more likely than average adults to have annual household incomes of $150,000 or more, 91% more likely to own homes valued at $500,000 or more, and 60% more likely to own second homes.

Super Greens are concentrated in the Pacific Northwest and West, including San Francisco (where they make up 17% of the population); Seattle (13%); Portland, OR (11%); San Diego (11%); Denver (10%); and Austin, TX (10%).

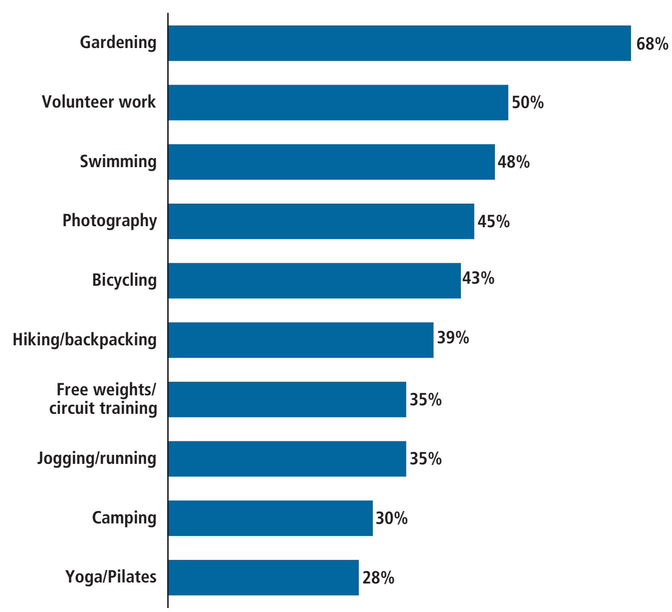
Members of Generation X are most likely to be Super Green, followed by Boomers. Super Greens are 86% more likely than overall U.S. adults to have college degrees, and 143% more likely to have post-graduate degrees.

They outspend average consumers in a variety of categories, including clothing, cosmetics, fine jewelry, electronics, luxury vehicles, and hardware/garden products. They're 21% more likely than the average consumer to spend $200 or more per week on groceries, 61% more likely to belong to a gym, and 219% more likely to ride a bicycle for transportation (although it should be noted that 93% drive most days). More than one in 10 carpool (13% — which makes them 94% more likely than overall adults to do so) or take buses (12% — 53% more likely than overall adults).

More than half of Super Greens (51%) have used Facebook in the past 30 days; they're 36% more likely than overall adults to have done so. They also index well above average for using LinkedIn (179% more likely) and Twitter (96% more likely).

TOP 10 ACTIVITIES AMONG SUPER GREEN CONSUMERS

(% who participated in the past year)



SOURCE: Scarborough Research

In their free time, Super Greens gravitate toward outdoor, active, and cultural pursuits.

TOP EVENTS ATTENDED BY "SUPER GREEN" CONSUMERS IN PAST YEAR

	% WHO ATTENDED	HOW MUCH MORE LIKELY THAN AVERAGE ADULT TO ATTEND
Art museum	42%	220%
Live theater	41%	114%
Professional sports event	41%	16%
Zoo	36%	44%
Rock concert	36%	121%

SOURCE: Scarborough

SOURCE: "All About the Super Greenies," Scarborough Research, Allyson Mongrain, Director, Marketing & Communications, 770 Broadway, New York, NY 10003; 703-451-3174; amongrain@scarborough.com; www.scarborough.com. Price: Available online at no charge.

Americans Worry About Water

Americans' top environmental concern is the health of the water supply, both drinking water sources and open bodies of water, according to Gallup. More than three quarters of adults say they worry a fair amount or a great deal about toxic waste contaminating soil and water; pollution of lakes, rivers, and reservoirs; and pollution of drinking water.

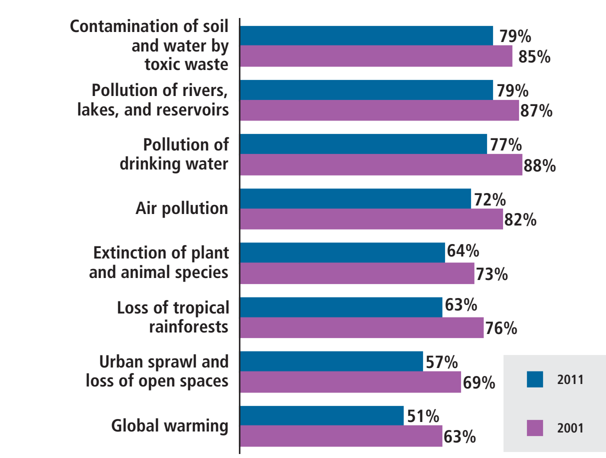
Despite being a more prominent topic in the headlines, global warming is lowest on Americans' list of environmental concerns, and fewer worry about it now than did in 2001.

Interestingly, Americans' level of concern about all environmental issues has declined since 2001, which likely reflects other issues — such as the Iraq War and the recession — taking precedence in their minds.

Natural disasters such as Hurricane Katrina, earthquakes, and the Gulf oil spill have underscored the importance of clean water, as well. More than half of adults (51%) worry a great deal about pollution of their drinking water.

AMERICANS' TOP ENVIRONMENTAL CONCERNS, 2011 VS. 2001

(% who are fairly or very worried)



SOURCE: Gallup

More than half (54%) of Americans believe that economic growth should take precedence over protecting the environment, while 36% are more concerned about the environment than the economy.

Young adults ages 18-29 (51%) are more likely than overall adults to place the health of the environment before economic growth.

SOURCE: Gallup poll, March 2011, Lydia Saad, 901 F St., NW, Washington, DC 20004; 202-715-3030; lydia_saad@gallup.com; www.gallup.com

factoid

10 "GREENEST" STATES IN THE U.S.

- Washington
- Colorado
- Massachusetts
- New York
- California
- Maryland
- New Jersey
- Minnesota
- Michigan
- Missouri

NOTE: Rankings are based on environmentally friendly consumer behaviors such as using renewable power, recycling and reusing, buying organic foods, driving hybrid vehicles, donating money to environmental groups.

SOURCE: Natural Marketing Institute; phone: 215-513-7300

family

Diversity is becoming the norm for American families, in race/ethnicity, family structure, and parents' sexual orientation. As discussed in the chapter on Emerging Majorities, four in 10 families with children are Black, Hispanic, and/or Asian. Nearly half of U.S. fathers have at least one child outside of marriage; the majority of Black and Hispanic fathers do. Multigenerational households are on the rise, and a significant proportion of grandparents provide financial support to their grandchildren. Nearly half of Americans support marriage rights for same-sex couples.

Millennials are less likely than members of any previous generation to believe a child needs both a mother and father to grow up happily. They're continuing a trend toward later marriage, and many are choosing cohabitation instead of or before marriage.

Parental roles are shifting, as well — albeit slowly. More than a third of fathers would prefer to stay home and take care of their kids full-time than work. Dads spend more time online with their kids than moms do, and they're more likely to take them to live shows or concerts.

Almost half of families eat dinner together at least six nights a week, and seven in 10 kids and teens say they feel closer to their parents when they're having dinner together. Parents have largely positive views of the role technology plays in family life, although they also try to keep tabs on their children's online activities. More than two thirds of parents feel their kids are overscheduled during the school year; some take matters into their own hands by pulling their children out of class for family vacations.

Children are being introduced to computers, mobile devices, and videogames earlier and earlier, in part because young parents are so attached to these technologies themselves.

Demographics Of Boomerang Families

Boomerang parents, defined as parents whose young adult children return to live with them, and parents without older children living at home are equally likely to say their children will have no trouble making it in the world (55% and 56%) and that having successful children is a sign of their own success (54% and 55%).

Half of Boomerang parents (52%) expect their children to allow them to move in with them when old age prevents them from living on their own.

DEMOGRAPHICS OF BABY BOOMER PARENTS WITH OLDER CHILDREN LIVING AT HOME VS. PARENTS WITHOUT CHILDREN LIVING AT HOME

	WITH KIDS	WITHOUT KIDS
Mean age of parent	53	57
Median household income	$84,800	$55,300
Live in current home more than 10 years	68%	55%
Have other children under 20 at home	40%	--
Married	85%	62%
Dual-income household	56%	42%

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.

Gen Y Places Kids Before Marriage

Young adults ages 18-29 are less likely than previous generations were at their age to consider marriage and family a natural combination, according to the Pew Research Center. While the majority do want both, they don't necessarily view marriage as a requirement for having children, and of the two goals they consider having children to be the larger priority.

More than half of births to 18-29-year-olds in 2008 were to unmarried mothers, compared with 39% in 1997. Although the proportion of births out of wedlock has increased, fewer young adults are having children early: 36% of 18-29-year-old women had ever had children in 2010, compared with 41% in 1998.

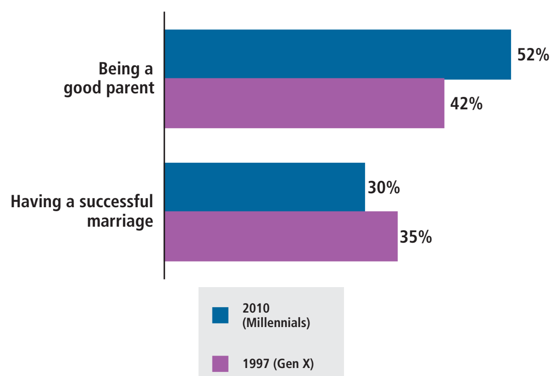
Millennials are continuing an ongoing trend toward marrying later in life — 22% of 18-29-year-olds are currently married, compared to 29% of Gen Xers who were married when they were 18-29. Cohabitation is becoming more widespread: 9% of Millennials are living with partners outside of marriage, compared to 6% of Gen Xers who lived with partners in 1997.

For most aspects of life, today's young adults feel that being married or single makes little difference to their chances of success. When it comes to raising a family, however, three quarters think it's easier to do within a marriage. About a third think it's easier to achieve career success as a single.

Seven in 10 young adults want to get married eventually, while 5% don't want to and 25% haven't made up their minds. Almost three quarters (74%) want to have children; 7% don't want to, and 19% don't know yet.

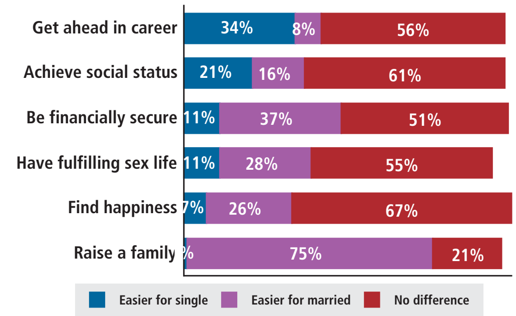
Young adults' top reason for wanting to get married is

WHAT 18-29-YEAR-OLDS CONSIDER "ONE OF THE MOST IMPORTANT THINGS IN LIFE," BY GENERATION



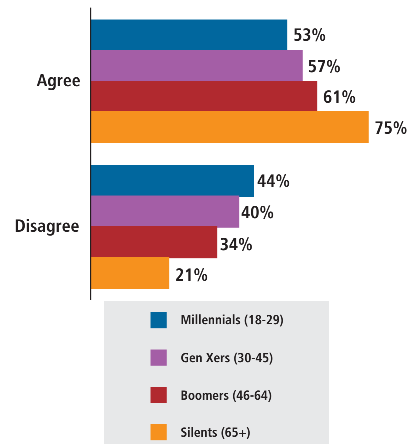
SOURCE: Pew Research Center

IMPACT OF MARITAL STATUS ON ABILITY TO ACHIEVE LIFE GOALS, ACCORDING TO MILLENNIALS



SOURCE: Pew Research Center

ADULTS WHO BELIEVE A CHILD NEEDS BOTH A MOTHER AND A FATHER TO GROW UP HAPPILY, BY GENERATION



SOURCE: Pew Research Center

love; fewer than half consider having children to be a very important reason.

SOURCE: "For Millennials, Parenthood Trumps Marriage, March 2011," Pew Research Center, Wendy Wang, Research Associate, Pew Social & Demographic Trends, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4375; info@pewsocialtrends.org; www.pewsocialtrends.org. Price: This study is available online at no charge.

For Gen Y Women, Family Takes Precedence Over Work

Gen Y working women (born between 1978 and 1994) consider family the most important part of life, followed by friends, according to the Business and Professional Women's Foundation. Nearly three quarters of Gen Y women who work (74%) consider family very important, compared to 29% who consider work very important.

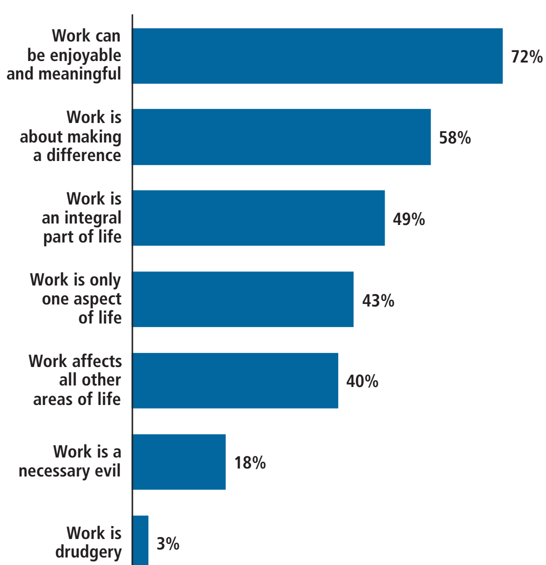
Women with children are more likely than those without to consider family very important (97% vs. 69%), while women without children are more likely than those with children to consider friends very important (53% vs. 25%). There are no significant differences in how moms and non-moms rate the importance of work.

While it may not be the most important part of their lives, Gen Y women have positive views toward work. They prioritize opportunities for achievement (50%), personal or organizational growth (48%), and helping others and/or society (43%) above financial compensation (39%).

Fitting Work Into Life

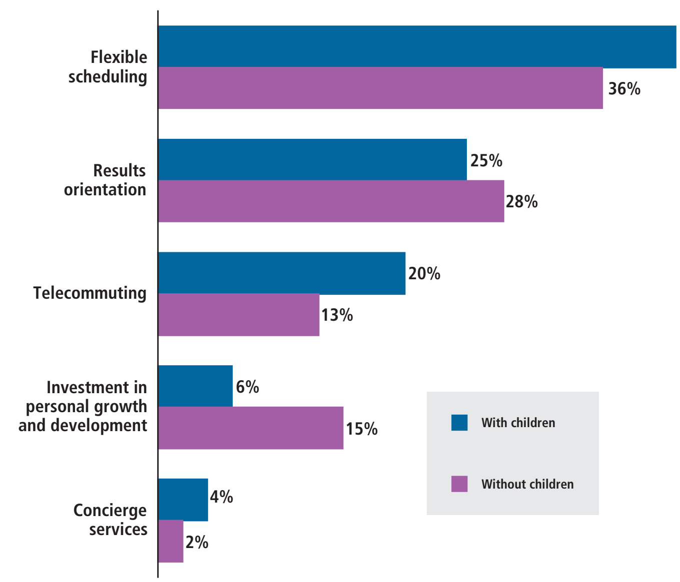
Although more than nine in 10 Gen Y women consider work-life balance very important (67%) or important (29%),

HOW GEN Y WOMEN FEEL ABOUT WORK



SOURCE: Business and Professional Women's Foundation

MOST IMPORTANT FEATURES OF WORK-LIFE BALANCE PROGRAM, ACCORDING TO GEN Y WOMEN WITH AND WITHOUT CHILDREN



SOURCE: Business and Professional Women's Foundation

they define this balance differently, depending on what kind of work they do.

Overall, half define work-life balance as integrating their work with their personal lives; 25% consider it having clear boundaries between the two, and 18% consider it having a workplace that reflects the realities of its workforce.

Salaried workers are more likely than hourly workers to define work-life balance as integrating work and personal life (54% vs. 43%), while hourly workers are more likely than their salaried counterparts to define it as having clear boundaries between the two (30% vs. 24%).

Women who work in education or administrative jobs are more likely than those who work in professional or sales/marketing jobs to define balance as clear boundaries.

Gen Y women are more likely to address work-life issues by taking personal steps such as trying to get enough sleep or take vacations, rather than confront work-life issues within their organizations.

Only a third have developed work styles and schedules that meet their needs and priorities; only one in 10 have discussed work-life balance issues with a manager or their human resources department.

Gen Y women consider work-life balance important whether or not they have children. One of their chief concerns about workplace policies and programs for work-life balance is that many such programs are designed around the needs of parents, sometimes at the expense of workers without children.

Gen Y women define their family responsibilities more broadly than being a wife and/or mother. They also place importance on other aspects of their lives such as hobbies, friends, exercise, and volunteer activities — and they consider all of these priorities for work-life balance.

SOURCE: "From Gen Y Women to Employers: What They Want in the Workplace and Why It Matters for Business: Research on Career Choices, Challenges, and Opportunities," Business and Professional Women's Foundation, Deborah Frett, CEO, 1718 M St., NW, #148, Washington, DC 20036; 202-293-1100; foundation@bpwfoundation.org; www.bpwfoundation.org. Price: Available online at no charge.

Families That Eat Together, Share Together

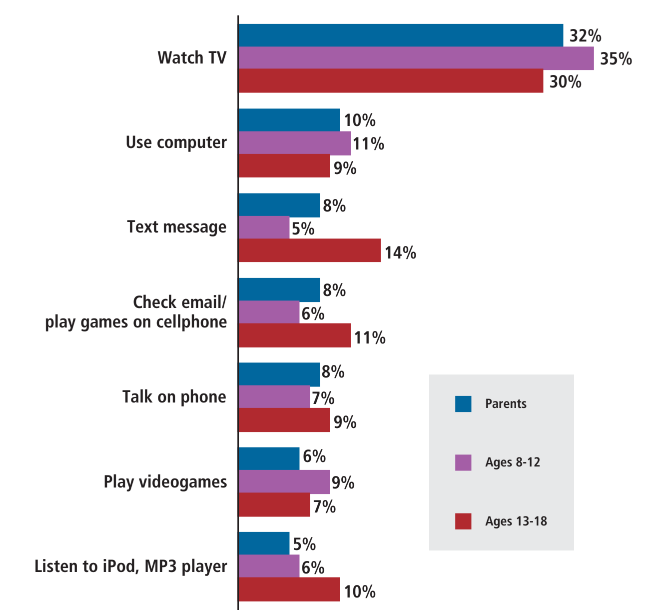
More than seven in 10 of those ages 8-18 (72%) feel closer to their parents and 70% appreciate them more when their families sit down together for a meal, according to Barilla and *Family Circle* magazine. More than eight in 10 parents (82%) feel closer to their children during meal time and 71% appreciate their children more when they take time to eat dinner together.

Parents and children agree on most characteristics that contribute to quality dinners , such as eating in the same room (77% of parents, 70% of kids), laughing (74% and 76%), being relaxed (69% and 70%), and ensuring that everyone is part of the conversation (66% and 65%). Kids are less likely than parents to feel that everyone must eat the same meal (54% vs. 60%) in order to have an enjoyable dinner.

Nearly half of parents and children (47%) say their families' busy schedules make it harder for them to find time to spend together. Three in 10 parents (30%) feel their children are often distracted at dinnertime, and 23% if kids feel the same way about their parents. One in three parents (32%) and kids (33%) always or often watch TV during dinner, and 27% of parents and 19% of kids use technological devices during dinner.

Nearly four in 10 parents (39%) say they had more family dinners when they were children than they have with their own children. Of those, 56% feel guilty for not having dinner with their families as regularly. Almost six in 10 parents (58%) feel guilty whenever they miss having dinner with their families.

ACTIVITIES FAMILIES "ALWAYS" OR "OFTEN" DO AT DINNER



SOURCES: Barilla, *Family Circle*

WHAT FAMILIES DISCUSS DURING DINNER

1. School/education
2. Activities, events among family members
3. An event in the news
4. Health/nutrition
5. A tough personal problem

SOURCES: Barilla, *Family Circle*

SOURCES: Barilla, Kirk Trofholz, President, 1200 Lakeside Dr., Deerfield, IL 60015; 847-405-7500; ktrofholz@barilla-usa.com; www.barilla-usa.com.

Family Circle magazine (Meredith), Linda Fears, Editor-in-Chief, 375 Lexington Ave., New York, NY 10017; 212-499-2000; linda.fears@meredith.com; www.familycircle.com.

Reasons Behind Having Children

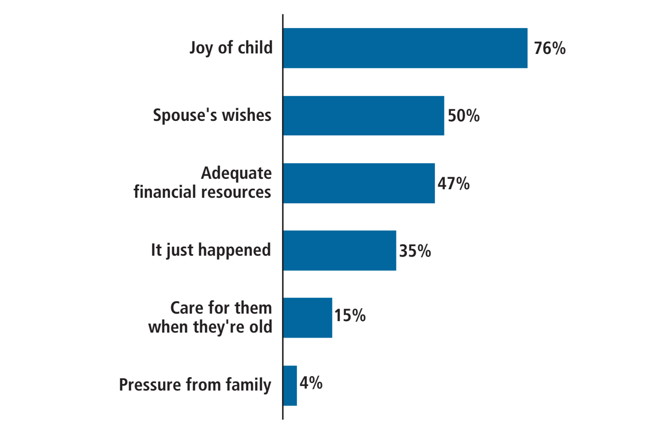
The largest number of Americans (46%) feel two children is the ideal number for a family; 26% say three; 9% say four, and 3% each say zero, one, or five or more, reports the Pew Center for Research. Among those with children, 61% with one or two consider that to be the ideal number; 53% with at least three believe three or more is ideal. Interestingly, 33% of parents with at least three kids say two is the ideal number, and an additional 2% wish they only had one child.

More than one in 10 Americans with children (11%) expect to have more, while 66% of Americans without kids want to have them.

Women are more likely than men to say the stress of raising children (56% vs. 44%) and the financial strain (52% vs. 44%) are important factors in limiting their family size.

The joy of having children ranks as the most important reason parents decide to have them, though 15% admit to having one in order to have someone take care of them when they are old.

WHY PARENTS DECIDE TO HAVE CHILDREN, 2010



SOURCE: Pew Research Center

SOURCE: Pew Research Center, D'vera Cohn, Senior Writer, Social & Demographic Trends, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4300; info@pewsocialtrends.org; www.pewsocialtrends.org.

Majority Of Black And Hispanic Dads Have Kids Outside Of Marriage

The majority of Black and Hispanic fathers have had children outside of marriage, according to the Pew Research Center. Overall, 46% of U.S. fathers have at least one biological child outside of marriage; 72% of Black fathers and 59% of Hispanic fathers do.

Black (44%) and Hispanic (35%) fathers are significantly more likely than White fathers (21%) to live separately from their children, as well. Even among fathers with children under age 5, Blacks (32%) and Hispanics (24%) are much more likely than Whites (10%) to be living apart from their kids.

Although fathers who live with their children naturally tend to be more involved with their children's daily lives than fathers who live separately from their kids, there are considerable variations in the level of involvement and contact among dads who live apart from their kids.

Black dads who don't live with their children are much more likely than White or Hispanic dads to talk to them frequently. Almost half (49%) of Black fathers who live separately from their kids talk to them several times a week about their daily activities and experiences, compared to 30% of White and 22% of Hispanic fathers.

Among fathers who live with their children, White (65%) and Black (62%) dads are more likely than Hispanic dads (45%) to read to their young children (under age 5) at least several times a week.

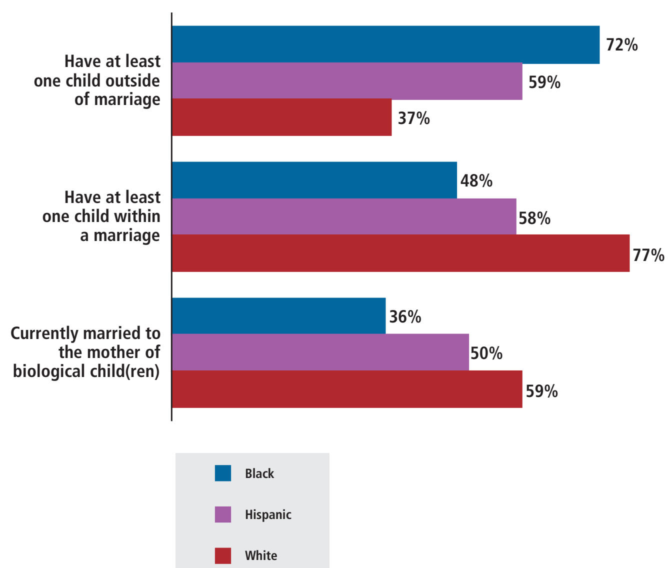
Hispanic fathers are much more likely than Black or White fathers to believe that people can't really be happy without children — 30% of Hispanic fathers agree or agree strongly with the statement, compared to 8% each of Black and White fathers. Among men without children, 19% of Hispanics think people can't be happy without having kids, compared to 4% of Whites.

The report also examines long-term trends that are contributing to changing family patterns, including an increasing number of fathers living apart from their biological offspring as well as fathering children outside of marriage and/or by more than one mother.

Overall marriage rates are declining, and family structures are becoming more complicated and fluid. Although fathers who live with their children are increasingly active in caring for and raising their children, larger numbers of fathers do not live with their children. Some of these fathers are in frequent contact with their children and play key roles in their daily lives, while others spend far less time with theirs.

SOURCE: "A Tale of Two Fathers: More Are Active, But More Are Absent," June 15, 2011, Pew Research Center, Paul Taylor, Director, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4375; info@pewsocialtrends.org; www.pewsocialtrends.org. Price: Available online at no charge.

FATHERHOOD WITHIN AND OUTSIDE OF MARRIAGE, BY RACE/ETHNICITY



SOURCE: Pew Research Center

Moms Value Manners Over Grades

More than three quarters of U.S. moms (77%) consider it more important for their children to have good manners than to earn good grades, according to Women at NBCUniversal. Just under half (49%) describe their ideal parenting style as "traditional."

Two thirds (66%) would rather be stay-at-home moms than work full-time. Among employed moms, 53% say they'd rather stay home and take care of their children full-time, but need to work for financial reasons.

When asked about the most serious issues facing children today, moms cited drug abuse and the "breakdown of the traditional family" as the top two. Coupled with an apparent yearning for traditional family roles is a recognition that fathers are taking a more active part in child-raising and household duties. Six in 10 moms (60%) believe that the number of stay-at-home dads will equal that of stay-at-home moms within the next 10-20 years.

That doesn't mean moms and dads see eye to eye on the current division of labor within the home. More than six in 10 dads (61%) say they split household duties and childcare equally with their partners, while only 27% of moms agree.

New moms often feel isolated, and younger moms are more likely than older moms to experience this. Four in 10 Gen Y moms (42%) felt isolated as new moms, compared to 24% of Gen X moms.

At the same time, moms overall often have trouble finding time for themselves; 31% admit to lingering over errands, appointments, commutes, or while in the shower just to get some downtime.

SOURCE: Women at NBCUniversal, Melissa Lavigne-Delville, VP of Trends and Strategic Insights, Integrated Media, 30 Rockefeller Plaza, New York, NY 10112; 212-644-2398; melissa.lavigne-delville@nbcuni.com; www.nbcuni.com. Price: Selected data available online; contact for additional information.

Moms Admit To Some Questionable Parenting Tactics

One in five moms say they have medicated their children to calm them down before traveling and one in 12 medicate their children on an average night in order to receive some downtime, according to a survey conducted by the Parenting Group and the *Today Show*. Almost one in two (49%) have knowingly sent a sick child to daycare or school.

Moms appear to value money over time with their kids. About four in 10 (42%) would prefer to receive a 50% raise at work rather than have 50% more time to spend with their kids. Nearly half (45%) would rather lose 15 pounds than add 15 points to their child's IQ.

Moms of boys have the most desire for a do-over. Of mothers who have ever wished their children were the opposite sex, two in three are moms of boys.

While moms admit to some questionable behaviors themselves, the vast majority (87%) are quick to judge one another. Moms are most critical with weight issues and weaning. One in three thinks negatively of moms of overweight kids and 43% think poorly of those who are still breastfeeding their children as toddlers.

SOURCES: The Parenting Group, Rachel Fishman Feddersen, Director Digital Content, Strategy, and Design; 2 Park Ave., New York, NY 10016; 212-522-8989; rachel.feddersen@bonniercorp.com; www.parenting.com.

Today Show, Gina Stikes, Director of Marketing, 30 Rockefeller Plz., New York, NY 10112; 212-664-7403; gine.stikes@msnbc.com; www.today.com.

Dad Gamers Play With Their Kids

Fathers of children age 12 and younger are more likely than mothers to participate in a variety of entertainment and computer-related activities with their children, according to Ipsos OTX MediaCT. While some differences — such as attending professional sporting events and playing videogames — are in line with overall gender differences, others are surprising.

Almost three quarters of fathers (73%) who own consoles or handheld gaming devices play videogames with their kids for an hour or more each week, compared to 38% of mothers who play that often.

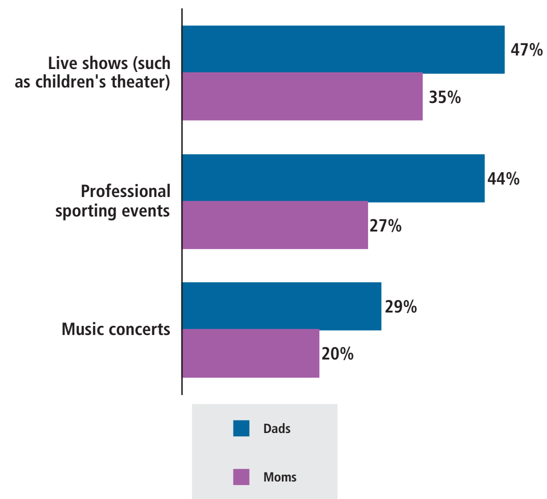
Fathers spend an average of 4.6 hours online with their kids every week, while mothers spend 2.9 hours. Dads are more willing than moms to pay for downloadable content for their kids, including music, games, movies, television, and educational materials.

More than eight in 10 fathers (84%) and 76% of mothers believe it's essential for children to learn computer skills as early as possible. A third of dads (33%) are friends with their kids on social networks, compared to 26% of moms (note that all children in this study are below the minimum age requirement of 13 for most social networks).

Fathers are more likely than mothers to take their children out to the movies or other events. Dads have taken their children to an average of 6.8 movies in the past year, compared to 4.4 for moms.

SOURCE: "Dads 2.0: LMX Family 2011," Ipsos OTX MediaCT, Donna Sabino, SVP Kids and Family Insights, 275 Seventh Ave., New York, NY 10001; 212-524-8242; donna.sabino@ipsos.com; www.ipsos.com. Price: Contact for information.

ENTERTAINMENT EVENTS TO WHICH PARENTS TAKE THEIR KIDS
(Regularly or sometimes)



SOURCE: Ipsos OTX MediaCT

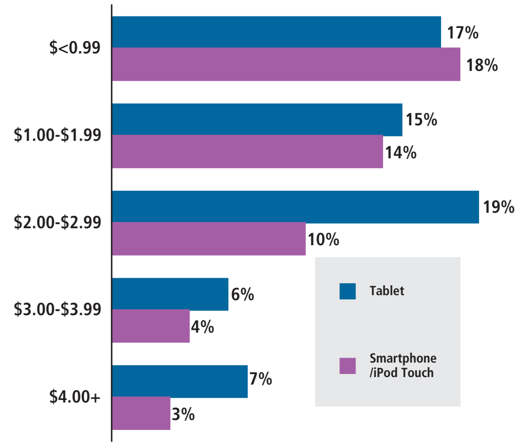
Dads Spend More Than Moms On Kid Apps

Parents typically download between one and five apps each month for their children, according to PlayScience Lab. They spend more on apps for tablet devices than for smartphones. While moms and dads are equally likely to download apps for their children, dads spend an average $.45 more than moms for phone apps and $.75 more for tablet apps.

When downloading apps for their children, parents of younger children are more likely than parents of older ones to prefer apps that teach literacy, art, creativity, social-emotional skills, and health and wellness. Parents of older children favor apps that teach problem solving skills, math, and history. Dads are more likely than moms to seek out apps that teach kids about science, history, and foreign languages. Moms tend to enforce more rules regarding their children's usage.

Parents express positive views about the value of mobile play. The majority feel mobile devices are good when traveling with their kids (70%), keeping their children occupied

AMOUNT PARENTS PAY TO DOWNLOAD APPS FOR THEIR CHILDREN, TABLET VS. SMARTPHONE, 2011



SOURCE: PlayScience Lab

(70%), enabling their children to be tech-savvy (57%), and helping to teach them new things (53%).

SOURCE: PlayScience Lab, Alison Bryant, President/Founder, P.O. Box 2318, Marion, NC 28752; 646-808-5333; info@playsciencelab.com; www.playsciencelab.com.

Parents Say School Interferes With Family Time

More than two in three parents (68%) feel their children are overscheduled during the school year and that it interferes with family time, according to *Parents* magazine and Lands' End. The majority (58%) also say it's difficult for their families to spend quality time together during the school year.

Nearly nine in 10 parents get stressed trying to manage their families' schedules and obligations during the school year, and 37% feel pressure from other parents to allow their children to participate in after-school activities.

Although families may be time-starved, they make efforts to spend time together. Nine in 10 (91%) specifically set aside designated "family time," and 99% think it's important for the entire family to eat dinner together as often as possible.

School Lunches

Parents have conflicting opinions when it comes to their children's school lunch programs. More than eight in 10 (85%) are concerned about the quality and healthfulness of these meals, yet 58% feel their schools offer healthy lunch programs.

Some choose to bypass the school meal program entirely. One in four (24%) say their children bring their own lunch to school five days a week. Most parents whose kids bring lunch send the meals in reusable containers (77%), though only 52% of parents say their kids always remember to bring the containers home.

SOURCES: Lands' End, Liz Pierce, Senior Design Director, 5 Lands' End Ln., Dodgeville, WI 53595; 608-935-9341; liz.pierce@landsend.com; www.landsend.com.

Parents magazine, Taryn Mohrman, Lifestyle Editor, 375 Lexington Ave., 10th Fl., New York, NY 10017; 212-499-2000; taryn.mohrman@meredith.com; www.parents.com.

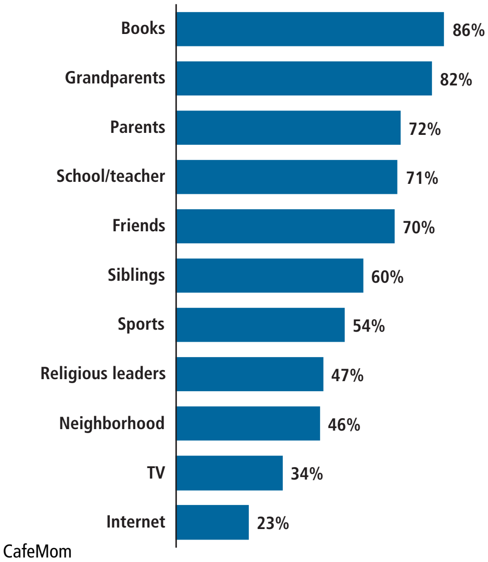
Moms Cite Books As Top Positive Influence On Their Kids

Moms feel books (86%) are more of a positive influence on their children than grandparents (82%), teachers (71%), and religious leaders (47%), according to CafeMom.

The vast majority of moms (84%) feel they spend enough quality time with their kids, averaging 28 hours a week. An equal percentage (88%) believe their kids spend enough time playing, exercising, and having fun.

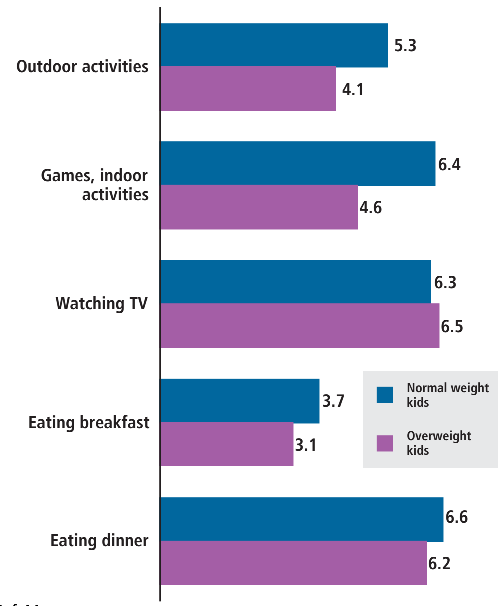
There appears to be a correlation between family togetherness and obesity. Moms with overweight children average 24 hours a week of family time, which is four hours fewer than moms of normal weight children. Moms with overweight kids are also five times more likely than moms of normal weight children to believe their children don't spend enough time playing and having fun and six times more likely to claim their child is unhappy.

POSITIVE INFLUENCES ON CHILDREN, ACCORDING TO THEIR MOMS



SOURCE: CafeMom

TIME SPENT TOGETHER AS A FAMILY EACH WEEK, ACCORDING TO MOMS, FOR THOSE WITH OVERWEIGHT VS. NORMAL WEIGHT CHILDREN



SOURCE: CafeMom

Moms place less importance on ensuring their children eat a healthy diet as their children age. Nine in 10 moms of preschoolers (90%) say making sure their kids eat right is a top priority, compared to 86% of moms of 6-12-year-olds and 79% of moms of 13-18-year-olds. Moms of preschoolers also spend 32% more time eating family meals with their kids than moms of teens do.

SOURCE: Cafemom (CMI Marketing), Laura Fortner, EVP Marketing and Insights, 401 Park Ave. S., New York, NY 10016; 646-435-6500; laura@cafemom.com; www.cafemom.com.

Moms Reading To Kids Begins Early

Nine in 10 families (92%) have an average 10 children's books at home, according to General Mills and Ipsos. Half of moms (53%) say reading is a favorite leisure activity that they do with their children and 67% read to their children daily; 26% do so a few times a week. Moms choose books for their educational value (62%), colorful illustrations (43%), topic (41%), and lessons or morals (38%).

SOURCE: "Mother And Child Activities," Ipsos, Nicolas Boyon, SVP, 1700 Broadway, 15th Fl., New York, NY 10019; 646-364-7583; nicolas.boyon@ipsos.com; www.ipsos-na.com.

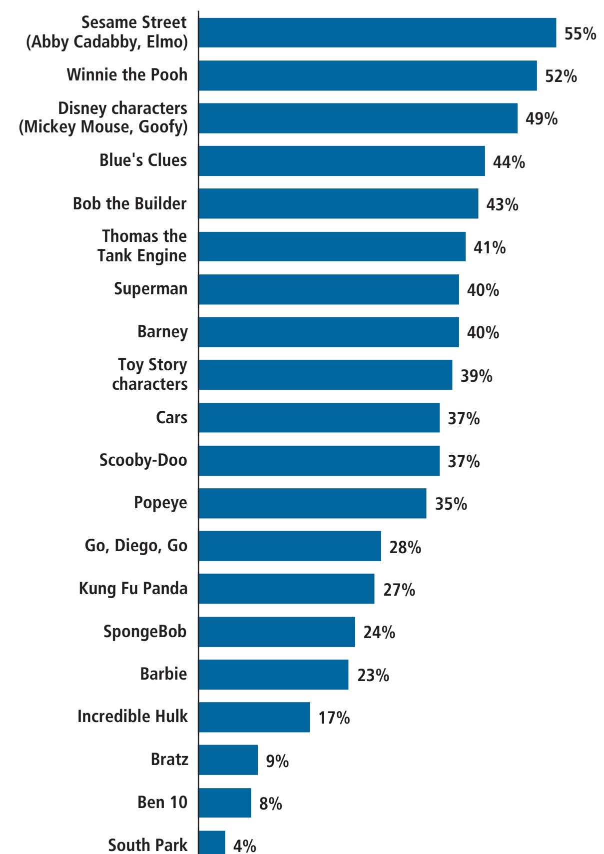
Sesame, Winnie The Pooh Deemed "Good Role Models" For Kids By Parents

Sesame Street characters and Winnie the Pooh are viewed by parents as the most positive movie or cartoon character role models for children, according to Mintel. Characters that are deemed good influencers for children tend to be a good fit for tie-ins to better-for-you food and grooming products, says Mintel.

Conversely, cartoon characters considered to be poor role models tend to maintain an edgy appeal that works well on products aimed at teens or young adults.

SOURCE: Mintel, Jennifer Ballard, 351 Hubbard St., 8th Fl., Chicago, IL 60610; 312-628-7946; jballard@mintel.com; www.mintel.com.

CARTOON, MOVIE CHARACTERS CONSIDERED "GOOD ROLE MODELS" BY PARENTS OF CHILDREN UNDER 13



SOURCE: Mintel

Kids And School In The A.M. Stress Parents Out

Six in 10 parents (60%) say getting their kids off to school in the morning is the most stressful part of their day, according to Lands' End and *Parents* magazine. To help ease the morning rush, many parents prepare the night before. Three in four (75%) bathe their kids the night before, 64% pack their children's backpacks, and 54% lay out their clothing. Among parents whose children don't wear uniforms, 74% say that apparel that allows them to mix-and-match items makes it easier to get kids dressed in the morning, and 73% say mix-and-match clothing makes it easier for kids to pick out their own outfits.

Parents want their children to enjoy childhood. More than nine in 10 (92%) feel kids should act appropriately for their age, while only 3% think kids should act mature and older than they are. More than half (55%) talk to their kids about the importance of being a kid, and 71% feel kids are trying to grow up too fast these days.

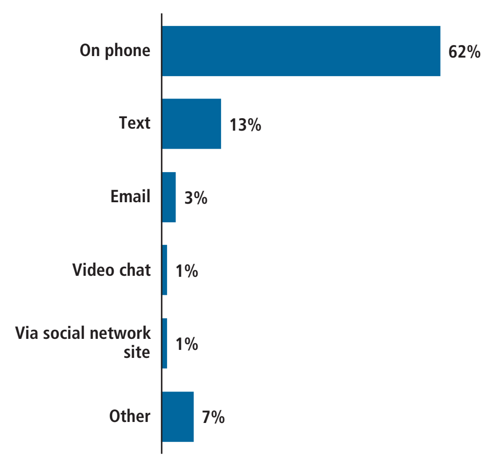
SOURCES: Lands' End, Liz Pierce, Senior Design Director, 5 Lands' End Ln., Dodgeville, WI 53595; 608-935-9341; liz.pierce@landsend.com; www.landsend.com.

Parents magazine, Taryn Mohrman, Lifestyle Editor, 375 Lexington Ave., 10th Fl., New York, NY 10017; 212-499-2000; taryn.mohrman@meredith.com; www.parents.com.

Most College Kids Talk To Parents Weekly

One in four college students (26%) talk with their parents several times a week, according to an AP/MTV poll. A similar percentage (24%) connect with their folks several

PRIMARY WAY COLLEGE STUDENTS TALK WITH THEIR PARENTS



SOURCES: MTV, AP

times a day, 22% touch base at least once a day, and 20% connect once a week. A mere 3% touch base monthly.

While students may prefer texting with their friends, the vast majority (62%) connect with their parents via the traditional way of using a telephone; 13% primarily text with their parents and 3% communicate via email.

SOURCES: Associated Press, Jack Stokes, 450 W. 33rd St., New York, NY 10001; 212-621-1739; jstokes@ap.org; www.ap.org.

MTV Networks, Colleen Fahey Rush, EVP Research, 1515 Broadway, New York, NY 10036; 212-258-8000; www.mtv.com.

Age Of Oldest Child Drives Moms' Purchases And Attitudes

The most important factor influencing moms' buying preferences is the age of their oldest child, according to Teri Thompson, CMO of Purdue University and founding member of the Marketing to Moms Coalition. These buying patterns are particularly evident in fast food and grocery purchases.

Drive-Thru Convenience

Moms of infants are 50% more likely than moms on average to say their fast food visits have increased year-over-year since the demands of caring for their infants leaves little time for their own food preparation.

In terms of where moms go, moms of preschoolers overwhelmingly prefer McDonald's, though pizza chains and Dunkin' Donuts also rank high. They are less likely to frequent Subway and Taco Bell because their children "do not readily consume sub-style sandwiches and spicy food," says Thompson.

There are some notable differences between the fast food habits of working and stay-at-home moms of preschoolers. Working moms are twice as likely as stay-at-home moms to visit fast food chains with their children regularly and to say that their preschoolers specifically request the restaurant.

While 49% of moms of preschoolers say their children provide input into the restaurant selection, this percentage increases to 65% among moms of elementary-aged children.

At The Grocery Store

Moms of preschoolers seek convenient, nutritious food choices with portion control. Moms would "rather spend time playing with or reading and singing to their child than fight the battle of perfect nutrition with the high chair occupant," says Thompson.

As with fast food preferences, the food buying habits of moms of preschoolers differs according to whether they work or stay at home. Working moms are less likely than stay-at-home moms to say their children specifically ask for "healthful" foods (11% vs. 18%) and more likely to hear requests for "treats," such as cookies and cupcakes (32% vs. 22%).

Working moms of preschoolers are more likely than their stay-at-home counterparts to say their children request juice or juice drinks (32% vs. 21%), though they also served their children more fruits and vegetables than stay-at-home moms (51% vs. 41%).

Moms of elementary-aged children have less control over what their children eat. Three in 10 moms of elementary-aged children (30%) say their kids spend their own money on junk food.

While moms strive to make dinner and breakfast healthy and nutritious, they are less stringent about the after-school snack. They typically purchase these snacks at the grocery store, and feel that cookies and crackers are acceptable.

Moms of elementary-school kids seem to fall prey to pester power. Half of these moms (52%) say their children request treats, compared to 46% of moms of preschoolers who say their children ask for these items. Four in 10 moms of elementary-aged children say their children ask for soda, compared to 22% of moms of preschool-aged kids.

The middle school years usher in a shift from a child who nags for specific items to being the teen who takes on responsibility for part of the food shopping. Two in three moms of teens (64%) ask their children to help with chores, compared to 49% of moms of tweens.

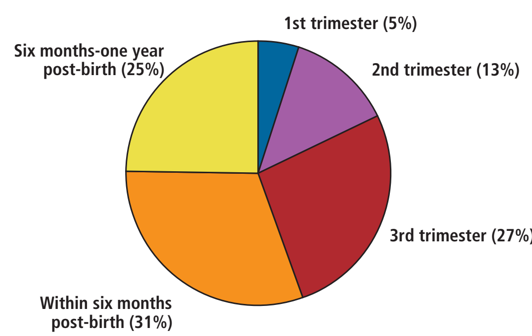
In addition to the household food spending teens and tweens influence, they also spend their own money on food and beverages. Teens age 13-17 are four times more likely to spend their own money on soda than 7-12-year-olds (16% vs. 4%) Teens are twice as likely as tweens to spend their own money to purchase candy and gum (31% vs. 15%).

SOURCE: *Tuning Into Mom*, Teri Lucie Thompson, VP Marketing and Media, Purdue University, West Lafayette, IN 47907; 765-494-2082; tlthompson@purdue.edu; www.marketingtomoms.org.

Moms-To-Be Spend $4,294 Prepping For Baby

Moms-to-be spend an average of $4,294 getting ready for their babies, according to TheBump.com. While 41% will spend more than $4,000, 58% say financial concerns have caused them to cut back on baby spending.

WHEN MOMS PURCHASE MOST OF THEIR BABY PRODUCTS



SOURCE: TheBump.com

AMOUNT MOMS-TO-BE SPEND ON BABY-RELATED PRODUCTS, BY REGION

Middle Atlantic (New York, Pennsylvania)	$4,625
New England (Maine, Massachusetts)	$4,546
Southwest Central (Texas, Oklahoma)	$4,499
South Atlantic (Florida, Virginia)	$4,294
Northeast Central (Michigan, Illinois)	$4,281
Pacific (California, Washington)	$4,256
Mountain (Colorado, Arizona)	$4,020
Southeast Central (Alabama, Louisiana)	$3,967
Northwest Central (Nebraska, Missouri)	$3,842
U.S. AVERAGE	$4,294

SOURCE: TheBump.com

More than half of their spending takes place post-pregnancy. Couples purchase about half of their pregnancy and baby items themselves and receive the other half as gifts or hand-me-downs.

More than eight in 10 moms-to-be (84%) register for baby gifts, an average of 4.5 months before the due date. They register for necessities, such as diapers, bottles, and formulas (94%); play items (89%); travel and car items (85%); safety items (80%); clothing (65%); and furniture (48%). Baby registry is dominated by two retailers: Babies R Us (80%) and Target (64%). Fewer than two in 10 register at Walmart (19%), Buy Buy Baby (9%), or Amazon.com (8%).

SOURCE: The Knot (The Bump), Jacalyn Lee, 462 Broadway, #6, New York, NY 10013; 212-219-8555, x1013; jacalyn@theknot.com; www.theknot.com.

Top Influencers For Baby Care Purchases

Women primarily rely on family and friends to learn about baby care products, according to Harbinger Ideas. They also seek out product reviews and professional opinions. They tend to avoid learning about these items via stories in the newspapers or through online advertising.

Women mostly want to learn about the product's quality, to find out if it fits their family needs, and to obtain product specifications. Notably, unlike other categories, such as toys or furniture, women don't place as much importance on finding the lowest priced baby products.

One in 10 women (10%) who write online reviews chime in with their opinions about baby care products, primarily to help others make smart purchases, to share a good experience, to share a bad experience, and because they were asked to share their thoughts.

TOP SOURCES WOMEN TURN TO FOR INFORMATION ON BABY CARE PRODUCTS

1. Friends/Family
2. Product reviews on (non-company) websites
3. Expert/professional opinion
4. Company websites
5. Advertising in TV/newspapers/TV News/Casual acquaintances

SOURCE: Harbinger Ideas

SOURCE: Harbinger Communications, Jeff Weiss, President, 252 Adelaide St., E, Toronto, ON Canada M5A 1N1; 415-960-5100; jweiss@harbingerideas.com; www.harbingerideas.com.

Grandparents Outspend Others

Households that include grandparents spend 4.4% more annually than non-grandparent households, translating to $300 more on average per year, according to Nielsen. Grandparents shop more frequently than average consumers, and they outspend average consumers in categories usually not associated with older adults, such as baby food, diapers, and toys.

Nearly four in 10 grandparents (39%) provide some kind of support for their grandchildren. Nearly a quarter (23%) buy clothes, 20% buy food and beverages, 16% help with household and personal care purchases, 10% contribute to education expenses, 8% help pay for daycare, and 5% help with medical care costs.

Grandparents who have one grandchild outspend those with multiple grandkids. Grandparents with solitary grandchildren spend 186% more than the average adult on toys and sporting goods, 65% more on baby foods, 33% more on disposable diapers, and 26% more on photography supplies.

Grandparent households spend more than non-grandparent households at supercenters, warehouse clubs, dollar stores, and convenience stores/gas chains.

Grandparents are enthusiastic users of email; 82% describe it as fast and easy, and it's the top online activity among adults who are expecting the birth of a grandchild.

SOURCE: "U.S. Grandparents Share More Than Love," February 2011, The Nielsen Company, Todd Hale, SVP, Consumer & Shopper Insights, 770 Broadway, New York, NY 10003; 646-654-5000; todd.hale@nielsen.com; www.nielsen.com. Price: Selected data are available online at http://blog.nielsen.com/nielsenwire/ Call for further information.

Families Spare No Expense For Graduates

Families expect to spend an average $983 on graduation parties for their high school and college students, according to party planning website GraduationParty.com. The average party takes place on a Saturday afternoon and includes 90 guests. Also:

- Two in three (67%) host parties in their own homes; 33% hold the event at a party room, park, or rental hall.
- 53% do not serve alcoholic beverages, 26% purchase food from a restaurant, and 28% hire a caterer.
- 47% use some type of Internet-based media to invite guests.
- 56% rent party equipment, such as tables, chairs, and tents.
- 37% complete some type of home improvement project, such as painting or deck repair, in order to prepare for a graduation party, spending an average $1,633 per project.
- 10% co-host parties with other graduates in order to save money.
- "Order less food" is the top response those who have hosted graduation parties in the past would do differently.

SOURCE: GraduationParty.com, Ginger Venable, 9172 Victoria Dr., Eden Prairie, MN 55347, 952-934-0932; ginger@graduationparty.com; www.graduationparty.com.

Technology Alters The Parent-Child Relationship As Families Disregard Traditional Rules And Guidelines

Today's children are undeniably multi-tasking digital natives, yet the same qualities also describe their parents. A 23-year-old parent was born in 1988, which means that by the time they entered elementary school, TV ads routinely provided web addresses and colleges were accepting admission applications online.

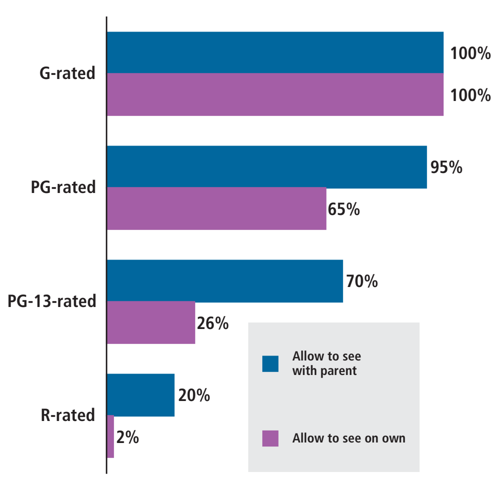
This tech-savvy generation of parents is ushering in a new way of raising children with implications that affect family-oriented marketers and advertisers.

Parents Know Best

Whereas older generations may still view technology with some suspicion (or at least unfamiliarity), today's young moms and dads are just as comfortable with the latest gadgets as their children are. And this comfort breeds confidence. "Parents are now the final arbiter of what's appropriate for their children. They aren't paying attention to traditional guidelines and institutions, such as videogame or movie ratings," says Ipsos OTX MediaCT's Donna Sabino. Parents create their own "fuzzy boundaries," she says. "They appreciate that there are hard-and-fast rules, but that's just not how they make their decisions."

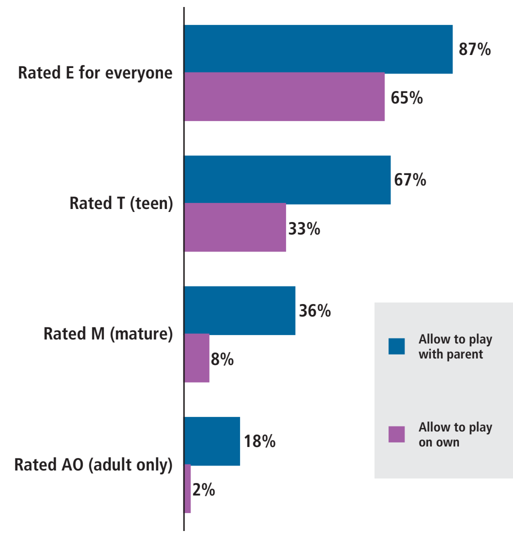
This means today's children are more likely to encounter media and other content that would have traditionally been off-limits to them. One in six parents of boys 9-12 (16%) allow their children to play videogames rated M, such as *Grand Theft Auto* and *Mortal Kombat*, and 51% let them play T-rated games, such as *Final Fantasy* and *World of Warcraft*.

PARENTS OF 6-12-YEAR-OLDS WHO ALLOW THEIR CHILDREN TO SEE MOVIES, BY RATING



SOURCE: Ipsos OTX MediaCT

PARENTS OF 6-12-YEAR-OLDS WHO ALLOW THEIR CHILDREN TO PLAY VIDEOGAMES, BY RATING



SOURCE: Ipsos OTX MediaCT

One in four parents (26%) allow their children under age 12 to see PG-13 movies on their own, and 20% take their children to R-rated movies with them. Four in 10 children under 12 — 10% of those ages 6-8 — visit social networks that have a minimum age of 13. Furthermore, 79% of parents who allow their kids to join social networks say they are friends with their kids on the sites.

Another influencing factor in children being exposed to older content at a young age is the fact many parents consume these products alongside their children. More than eight in 10 parents (84%) have played a videogame with their 6-12-year-old children within the past week, according to Ipsos. This may stem from parental preferences as well as parenting philosophy: dads may prefer to play the *Call of Duty* videogame with his son rather than *Kirby's Epic Yarn.*

An erosion of trust may also be at work. "Today's parents grew up with Enron, church scandals, Bernie Madoff; all of these traditional pillars of society they know aren't really true. What was supposed to be safe, sound, and dependable isn't. They say to themselves, 'I was a believer, but if this proved to be false, then maybe I am the best judge. I know my child and I am capable of making the best decisions.'" Sabino adds that when parents form opinions, they stick by them. They rarely waver in their belief that they know what's best for their children.

For marketers, this means young parents are less accepting of research-driven data or authoritative messages. They are skeptical of government endorsements and don't fully trust product package claims. The most effective campaigns convey a colleague to colleague message rather than teacher to student.

Potential Concerns

While it may be relatively harmless for parents to allow their children to watch R-rated movies, parental disregard for school rules can create problems for teachers.

Some educators say that they are having more difficulties with parents than with students — such as students skipping school because their parents decide that a family vacation should take precedence. Despite banning cellphones in school, some teachers say they've heard parents telling their kids to "hide" the devices in their backpacks.

"What does it say to children when their parent says it's okay to fudge their age on Facebook? Will kids figure out that perhaps their parent is a better judge [on this one issue] and knows them [to make the right decision] or will they feel that all rules don't matter and therefore will disregard all of them?" asks Sabino.

ACTIVITIES PARENTS DO WITH THEIR CHILDREN AGES 6-12 EACH WEEK, 2011

Watch live TV	94%
Watch DVR	92%
Read	92%
Listen to music	90%
Go online	87%
Play videogames	84%

SOURCE: Ipsos OTX

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

Parents Have Positive View Of Tech

Parents who have positive attitudes toward technology tend to be more optimistic in general than those who view technology as a negative force in their lives, according to research by Ogilvy & Mather and Communispace.

The study identifies four segments of families (parents with children ages 3-12), based on their attitudes toward technology:

- Tech Fast Forward (19% of parents): Uses more sophisticated technology than the average person, enthusiastic about technology
- Tech Forward (42%): Has integrated technology into life and would have difficulty functioning without it
- Tech Neutral (36%): Has incorporated technology into life on a basic level but less reliant on it than average
- Tech Backward (3%): Actively avoids technology

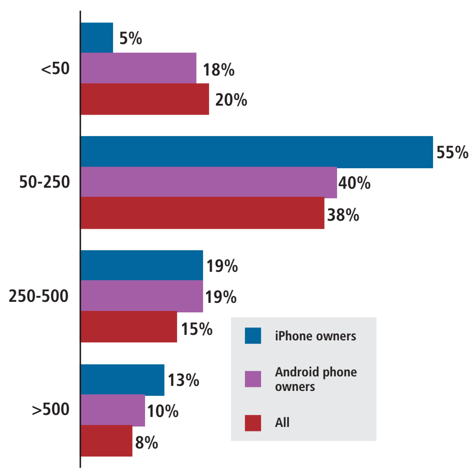
Tech Fast Forward parents are predominantly male (70%), more likely than the average parent to have household incomes of $150,000 or higher, to live in the South or on the West Coast, and to be Asian (twice as likely) or Black (33% more likely).

While most parents (84%) agree with the idea that "technology is a positive force in our lives," Tech Fast Forward parents are more likely to agree strongly (59% vs. 30%).

Tech Fast Forward parents are more likely than parents overall to view technology as facilitating connections and closeness with their children, rather than creating distance between family members.

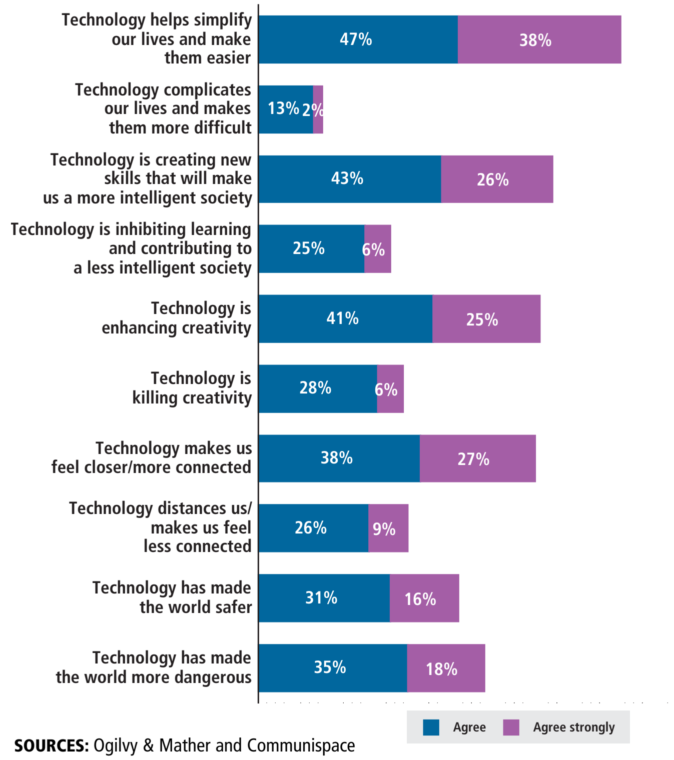
Tech Fast Forward parents are more sanguine than other parents about their children's future in general, and they have greater confidence than other parents in their children's abilities to handle privacy, safety, and other issues associated with technology.

HOW MANY FACEBOOK FRIENDS PARENTS HAVE



SOURCE: Retrevo

PARENTS' ATTITUDES ABOUT TECHNOLOGY



SOURCES: Ogilvy & Mather and Communispace

Parents Use Facebook To Keep Tabs

Almost half of parents with teenage kids (47%) have used Facebook to learn more about their teens' friends, according to Retrevo. More than a third (34%) check out the parents of their teens' friends on the site. Parents' use of Facebook to keep tabs on their children peaks during the teen years, then drops off sharply once their kids reach age 20.

Just over one in 10 parents (12%) investigate their teens' dates on Facebook; iPhone owners (20%) are more likely than other parents to do so. Parents who own iPhones are more active social networkers in general than other parents are.

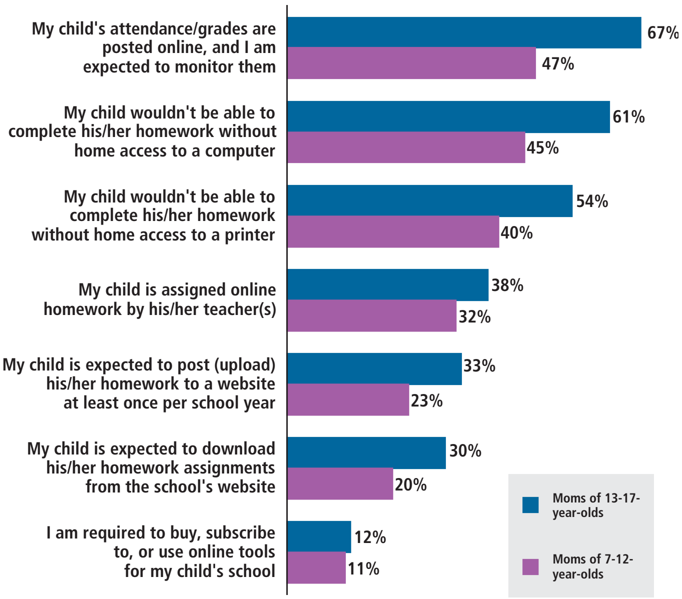
SOURCES: "Tech Fast Forward 2011: Plug In to See the Brighter Side of Life," Ogilvy & Mather and Communispace. Communispace, Manila Austin, Ph.D. VP Research, Arsenal on the Charles, 100 Talcott Ave., Watertown, MA; 617-607-1472; maustin@communispace.com. Ogilvy & Mather, Graceann Bennett, Managing Partner, Director of Strategic Planning, 350 West Mart Center Dr., #1100, Chicago, IL 60654; 312-856-8218; graceann.bennett@ogilvy.com; www. ogilvy.com. Price: Available online at no charge.

"Retrevo Gadgetology Report," June 2011, Retrevo, Paul Kaye, VP Sales and Business Development, 440 N. Wolfe Rd., Sunnyvale, CA 94085; 855-738-7386; paul@retrevo.com; www.retrevo.com. Price: Contact for information.

Moms Say Kids' Schoolwork Requires Home Computer

More than four in 10 U.S. moms with children ages 7-12 say having computer access at home is necessary for their children to complete their schoolwork. Nearly half say they're expected to monitor their children's progress online, according to the Marketing to Moms Coalition.

CHILDREN'S SCHOOLWORK THAT REQUIRES HOME COMPUTER ACCESS, ACCORDING TO MOMS



SOURCE: Marketing to Moms Coalition

Moms' planned back-to-school spending has declined most in electronics — down 13% to $48 from 2010 and 25% less than in 2009. Moms of 7-12-year-olds plan to spend an average of $409 on back-to-school items, down from $440 in 2010.

Almost eight in 10 moms (79%) say they're being asked to buy non-academic supplies for their children's classrooms, such as cleaning or storage supplies, toilet paper or facial tissues, and food and beverages.

The majority of moms (54%) shop for back-to-school items in physical retail stores, though 43% shop both online and in stores. Moms are cutting corners on back-to-school clothing, expecting to spend a mean of $126 in 2011, down from $154 in 2010.

SOURCE: "Back to School 2011 Highlights," Marketing to Moms Coalition. Current Lifestyle Marketing, Amy Colton, SVP, 111 E. Wacker Dr., Chicago, IL 60601; 312-929-0503; acolton@currentlm.com; www.talktocurrent.com; www. marketingtomoms.org. Price: Available online at no charge.

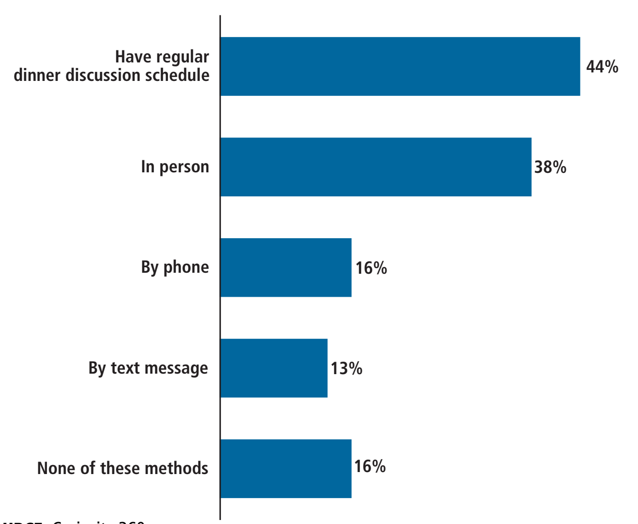
Families Put Mobiles Away At Dinner

Nearly half of families (47%) eat dinner together six or seven times per week, according to Curiosity 360. One in three gather around the dinner table 3-5 nights per week, 10% for 1-2 nights, 5% on special occasions, and 5% claim they never eat as a family.

More than one in four families (27%) have sent a text message to plan a meal with other family members, 18% have used email, 14% have used Facebook, and 8% have used instant message. However, the most common ways families typically discuss meals are through set schedules and in person.

Four in 10 families (40%) don't use cell phones while dining together, though they don't have any formal rules banning them; 24% of families don't allow cell phones and have

HOW FAMILIES REGULARLY DISCUSS DINNER PLANS



SOURCE: Curiosity 360

a rule forbidding them, 23% of families say sometimes someone will answer a call, and 3% of families claim someone is constantly using their phone while eating at the dinner table. No word on what the other 10% of families are doing.

SOURCE: Curiosity 360, Greg Livingston, Partner, 221 E. 4th St., #2300, Cincinnati, OH 45202, 513-744-6000, glivingston@curiosity360.com; www.curiosity360.com.

Preschoolers Live In Wired Households

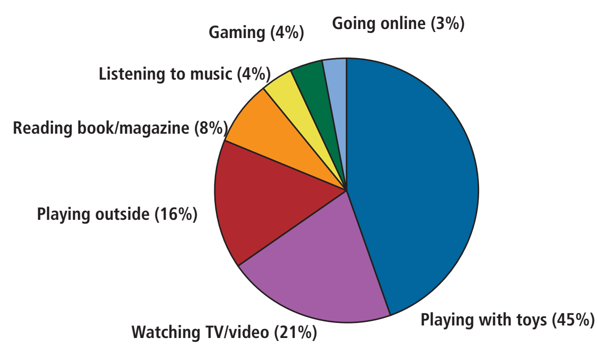
Today's preschoolers grow up in households even more wired than their older counterparts. Households with preschoolers are more likely than those with 6-12-year-old to own laptops (82% vs. 76%), handheld gaming devices (38% vs. 24%), gaming consoles (76% vs. 63%), and Internet-connected cellphones (69% vs. 65%), according to Ipsos OTX.

More than half of those under age two (54%) are able to play videogames on handheld gaming devices by themselves, and 49% are able to navigate their families' DVR systems to watch videos.

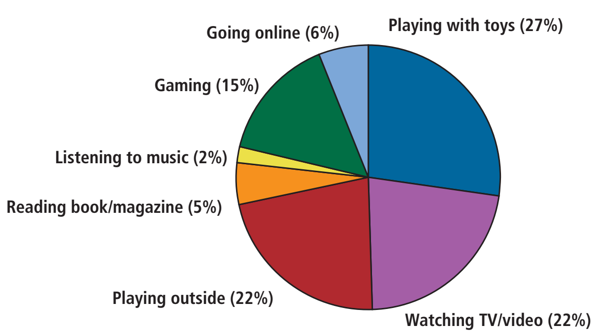
Technology is also affecting their play patterns. Although those under age two still spend most of their free time playing with toys, 4% play videogames and 3% access the Internet.

HOW PRESCHOOLERS SPEND TIME ON THEIR OWN

Ages 0-2

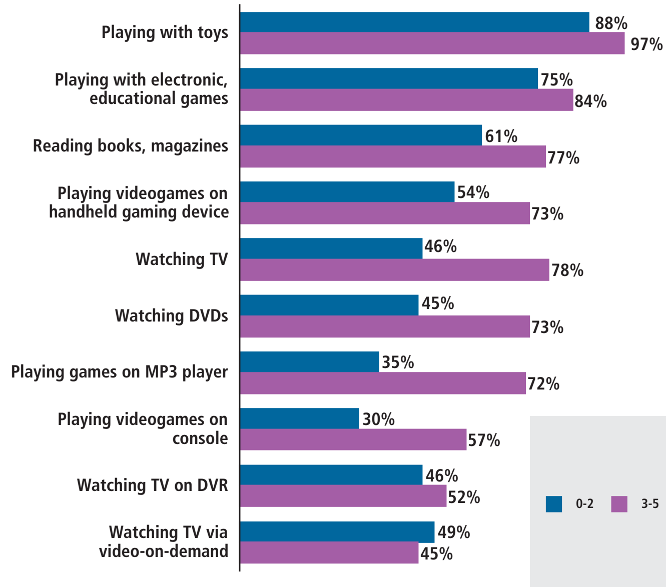


Ages 3-5



SOURCE: Ipsos OTX

ACTIVITIES PRESCHOOLERS DO ON THEIR OWN



SOURCE: Ipsos OTX

By the time children reach ages 3-5, they spend 15% of their free time on videogames and 6% on the Internet.

SOURCE: Ipsos OTX Media CT, Donna Sabino, SVP Kids and Family Insights, 275 Seventh Ave., New York, NY 10001; 212-524-8242; donna.sabino@ipsos.com; www.ipsos.com.

Teens Say Texting Grandparents Are "Cool"

Grandchildren ages 13-17 are more likely to keep in touch with their grandparents through text messages (27%) than through sending letters or cards (12%), according to app and texting software developer TextPlus.

More than half of grandchildren (54%) consider grandparents who text to be cool, and 34% consider them practical. There are many more teens who "would like" to text with their grandparents as those who "prefer" to do so (40% vs. 24%).

SOURCE: TextPlus (Gogii), Tricia Bertero, Chief Marketing Officer, 13160 Mindanao Way, Marina del Ray, CA 90292; 877-776-0611; contact@gogii.net; www.textplus.com.

Parents Have Own Views On Children's Technology Habits

Nearly half of parents of children ages 3-10 (47%) believe computer activities — not including games or the Internet — afford the greatest educational potential for their children, according to Sesame Workshop.

Fewer than two in 10 parents feel exploring or surfing the Internet (19%) or playing games on the computer (18%) offer educational value for their children. Relatively few parents say TV (9%), playing games on a TV-based console, or playing games on a cellphone (1%) are educational.

Almost three in four parents (73%) believe technology in general is important to their children's success in school, and 65% feel it's essential to their future career choices. More than two in three feel some videogames can help kids develop skills important to their academic success, and 57% say games give kids opportunities to practice interpersonal skills such as cooperating, negotiating, and communicating.

However, parents aren't unabashedly enthusiastic about all things digital. More than four in 10 (42%) feel some videogames are too violent for their children, and 52% feel technology takes up time their child should be spending on other activities.

Rules And Regulations

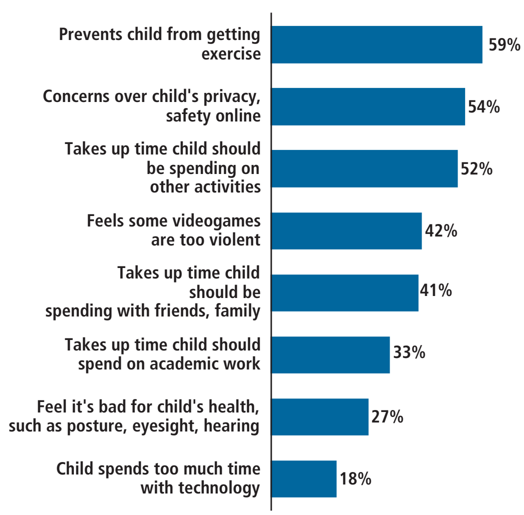
The majority of parents (64%) have rules regarding their children's media use, but determine the specifics on a case-by-case basis. Mobile devices and the Internet are the two categories on which parents oversee most carefully.

Overall, 22% of parents feel they have "strict" rules, while 8% have rules that "aren't strongly enforced," and 7% have no rules.

While one might assume parental personality would shape their opinions regarding media usage, the biggest factor is the child's age. Age seven is typically the age at which parents regulate media usage most carefully, after which the level of regulation declines. Most parents with children under six haven't yet set parental controls on their computers. Parents' age also impacts their monitoring: parents over 50 are most likely to set rules and those under 30 least likely, regardless of their child's age.

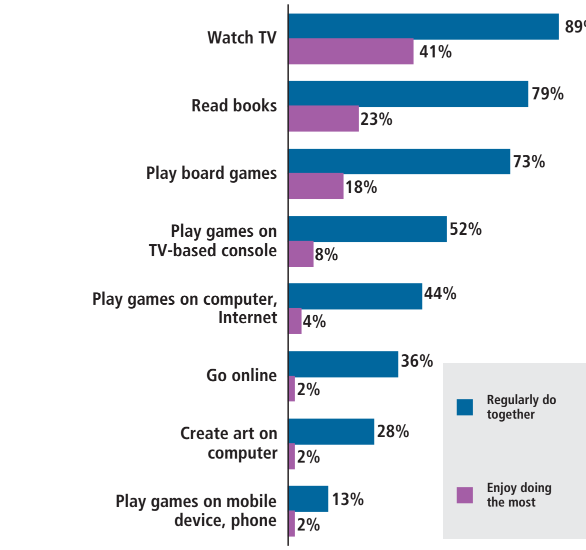
Three in four parents (75%) don't believe kids younger than seven should be using regular cellphones, and 83% are

REASONS PARENTS LIMIT THEIR 3-10-YEAR-OLD CHILDREN'S TIME WITH TECHNOLOGY



SOURCE: Joan Ganz Cooney Center at Sesame Workshop

ACTIVITIES PARENTS AND CHILDREN DO TOGETHER AND WHICH ONES PARENTS ENJOY DOING THE MOST



SOURCE: Joan Ganz Cooney Center at Sesame Workshop

against them using smartphones. More than seven in 10 parents (73%) think it's inappropriate for children under 13 to own smartphones, and 40% don't think children under 13 should own regular cellphones.

Nearly half of parents (47%) don't let their 3-10-year-old children use mobile devices at all, including cellphones, MP3 players, and handheld videogames. Of parents who let their children use mobile devices, 95% restrict their usage in some way, with 50% banning text messaging and 38% not allowing them to talk on the phone.

Nearly all children's Internet use (97%) is limited or monitored in some way. Seven in 10 computers (70%) have parental controls in place. The same percentage of families (70%) don't permit their children to visit social networks or chat online, and only 47% allow them to play Internet-based games.

SOURCE: Joan Ganz Cooney Center, Michael Levine, Executive Director, One Lincoln Plz., New York, NY 10023; 212-875-6510; michael.levine@sesameworkshop.org; www.sesameworkshop.org.

Parents Monitor Teen Online Activities, But Teens Don't Know They Are

One in three parents (36%) use Web monitoring software or a Web filter to keep tabs on their teens' online activities, according to GFI Software. Among teens who claim their parents aren't using such software, 10% of parents actually are.

One in four teens (24%) and 33% of parents aren't sure if Internet safety is taught at school. Furthermore, while 72% of teens access the Internet at school, 26% of parents aren't sure if their teens' school monitor their Internet use.

Nearly all parents (94%) say they have spoken to their teens about Internet safety, though 10% of teens say this discussion never happened, and another 6% can't remember if such a conversation took place.

Teens do try to conceal their online footprints. More than four in 10 (42%) clear their browser history, with 5% doing so frequently. More than eight in 10 teens with Facebook accounts (83%) say they use privacy settings to help hide content from their parents, and 34% have created online accounts that their parents don't know about.

Three in four parents (73%) believe most teens do things online that they wouldn't want their parents to know about.

There may be a reason for parental concern. One in four teens (24%) have visited a website intended for adults, with 13% of teen boys admitting they do so "often" or "sometimes." More than half of those who visit adult websites (53%) lie about their age to gain access.

Nearly half of teens (47%) say their home computers have been infected by viruses, even though 77% of teens and 76% of parents are "very" or "somewhat" confident their machines won't be infected.

Although the majority of families (89%) have anti-virus software installed on their home computers, only 28% update it daily, and 24% don't know if they update their virus software. More than one in three parents (37%) who bring work computers home let their teens use them. More than half of teens (57%) and 60% of parents use thumb drives to transfer data from one computer to another.

More than three in 10 teens (31%) have said things online that they wouldn't say in person. Girls are twice as likely as boys to have been bullied online or via text message (15% vs. 7%).

Nearly one in three teens (29%) have been contacted online by strangers; of that group, 62% say it's happened on more than one occasion and 23% have responded to the strangers in some way.

SOURCE: "Parent-Teen Internet Safety Report," GFI Software, Jarred LeFebvre, 15300 Weston Parkway, #104, Cary, NC 27513; 866-389-5597, x6108;

factoids

➤ More than six in 10 parents (62%) occasionally monitor their children while they're on **social networks**. *(SocialShield; phone: 800-239-0120)*

➤ More than three in 10 recently **married women** (31%) have bachelor's degrees. *(U.S. Census Bureau; phone: 301-763-3030)*

➤ Almost two thirds of **working moms** (65%) read to their children during the summer. *(*Working Mother*; phone: 212-779-5000)*

➤ The majority of parents with teenage children (54%) log onto their teens' **social networking accounts** to monitor their activities. *(SocialShield; phone: 800-239-0120)*

➤ More than a third of Gen Y moms (34%) say their children were using **laptop computers by age 2**. *(*Parenting*; phone: 212-522-8989)*

➤ Seven in 10 adult **caregivers** (72%) are taking care of one of their parents. *(Gallup; phone: 202-715-3030)*

➤ The **number of annual births** in the U.S. dropped 7% to 4 million between 2001 and 2010. *(Demographic Intelligence; phone: 434-286-2275)*

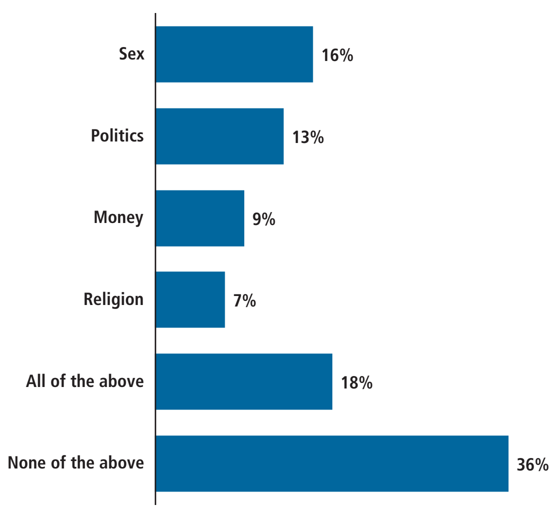
➤ More than half (56%) of married adults in the U.S. consider their **marriages** excellent; 29% say they're good. *(Rasmussen Reports; phone: 732-776-9777)*

➤ One fifth of U.S. men and women ages 50-69 have been **married** twice. *(U.S. Census Bureau; phone: 301-763-3030)*

➤ Almost two thirds (65%) of adults age 18 and older bought flowers for **Mother's Day** in 2011. *(BIGresearch; phone: 614-846-0146)*

➤

MOST UNWELCOME DINNER TABLE DISCUSSION TOPICS IN U.S. HOUSEHOLDS



SOURCE: 60 Minutes/*Vanity Fair* Poll, *Vanity Fair,* 4 Times Sq., 7th Fl., New York, NY 10036; 212-286-2860; www.vanityfair.com

FAST FACTS:

Baby Names

- The most popular names for Hispanic baby girls born in 2010 were Sophia, Valentina, and Isabella.
- The most popular names for Hispanic baby boys were Santiago, Sebastián, and Matiás.

SOURCE: BabyCenter, Aimee Geller Promisel, 163 Freelon St., San Francisco, CA 94107; 646-487-6380, x206; aimee.geller@babycenter.com; www.babycenter.com.

About half (49%) of U.S. adults say their **mothers** were more influential than their fathers in their upbringing; 33% say their fathers were more influential. *(Rasmussen Reports; phone: 732-776-9777)*

➤ First marriages that end in **divorce** last a median of eight years. *(U.S. Census Bureau; phone: 301-763-3030)*

➤ More than one in 10 women (13%) say they've broken up with a man they were **dating** because he didn't want children (or did if the woman didn't). *(*Women's Health*; phone: 610-967-5171)*

➤ Americans planned to spend $3.1 billion on **Mother's Day brunches** in 2011. *(National Retail Federation; phone: 800-673-4692)*

➤ More than half (55%) of **married couples** in the U.S. have been married for 15 years or more. *(U.S. Census Bureau; phone: 301-763-3030)*

➤ Three quarters of parents wish they had time to take their children to **playgrounds** more often. *(KaBOOM; phone: 202-464-6186)*

➤ More than one in 10 **brides** (13%) offered interactive food stations — such as a sushi chef or sommelier with wine tasting — at their weddings in 2010. *(TheKnot.com; phone: 212-219-8555)*

➤ Seven in 10 parents (70%) feel it's more unsafe for kids today to **play** outside than when they were young. *(Smarty Pants; phone: 203-847-5766)*

➤ Britney Spears is the **celebrity** moms would least want babysitting their children (31%), followed by Courtney Love (26%) and Octomom (24%). *(Yahoo!; phone: 626-685-5600)*

➤ More than a quarter of **expecting moms** (28%) got manicures or pedicures before delivering their babies. *(BabyCenter; phone: 646-487-6380)*

- More than one fifth of **married women** (21%) earned at least $5,000 more than their husbands in 2010. *(U.S. Census Bureau; phone: 301-763-3030)*

- 46% of Americans feel that two children is the ideal **family size**; 26% say three, 9% say four, and 3% say zero. *(Pew Research Center; phone: 202-419-4300)*

➤ Twenty-one percent of women don't want to have **children**. *(*Glamour*; phone: 212-286-2860)*

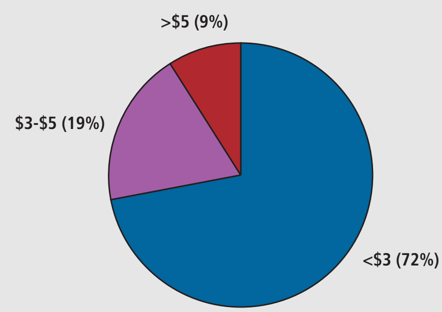
- 29% of U.S. mothers have had to borrow money to buy **diapers**. *(Kimberly-Clark; phone: 920-721-2000)*
- Teens are more likely to think their mom is **"cool"** (63%) than their dad (47%). *(Ipsos; phone: 312-665-0552)*
- More than a third of U.S. **fathers** (36%) would rather stay home and take care of their children full-time than work. *(NBCUniversal; phone: 212-644-5191)*
- Just under half (46%) of heterosexual adults support the legal right for **same-sex couples** to marry; 10% are undecided. *(Harris Interactive; phone: 585-272-8400)*
- Some 6.7 million U.S. adults have **grandchildren** under the age of 18 living with them. *(U.S. Census Bureau; phone: 301-763-3030)*
- In 72% of **weddings**, both partners are in their first marriages. *(U.S. Census Bureau; phone: 301-763-3030)*

FAST FACT:

Fairies Price Kids' Teeth Under $3

The majority of "tooth fairies"(72%) leave less than three dollars per tooth, according to *Redbook*. Two in 10 (19%) place $3-$5 and a generous 9% give at least $5 for every tooth.

AMOUNT TOOTH FAIRIES GIVE CHILDREN PER TOOTH



SOURCE: *Redbook*

finance

Americans at all levels of income are feeling unease about the economy; even those in the highest income bracket are cutting back on their spending. Women are more likely than men to have been unable to pay bills on time, visit a doctor, or fill a prescription in the past year due to cost.

The division between the household wealth of non-Hispanic Whites and that of Blacks and Hispanics is at its highest point since 1984. White households' median wealth is 20 times that of Hispanic households and 18 times that of Black households.

Hispanics are less likely than Whites, Blacks, or Asians to feel financially secure. Despite having an unemployment rate equal to that of Hispanics — and more than twice that of Whites — Blacks are the most likely to be optimistic about their personal finances.

The majority of teens get allowance from their parents, and three in 10 have jobs. Most teens have to do some form of work or chores in exchange for their allowance. Children from more affluent families tend to have less money in their personal bank accounts than those from middle-income families. More than six in 10 teens have savings accounts; parents consider having such an account the most important tool in teaching financial responsibility.

Americans Dealing With Financial Hardship

Between 2007 and the end of 2010, 17% of U.S. women and 11% of men "doubled up" (took in or moved in with other adults) in order to save on household expenses, according to the Institute for Women's Policy Research. Family members and romantic partners are the most likely candidates for doubling up. Women are more likely than men to have moved in with/taken in family members (13% of women vs. 10% of men), romantic partners (7% vs. 5%), and unrelated roommates (4% vs. 2%). [See also related story on page 8.]

Women are more likely than men to be having difficulty meeting routine living expenses, including monthly bills, food, healthcare, and transportation costs.

A quarter of women (25%) and 21% of men have been unemployed (and looking for work) for at least one month during the past two years. Women ages 18-34 are twice as likely as men that age to have been unemployed in the past two years (50% vs. 24%). More than four in 10 single mothers (42%) have been unemployed in the past two years. Among employed adults, women are less likely than men to say they have enough saved to cover two months' of expenses (43% vs. 61%).

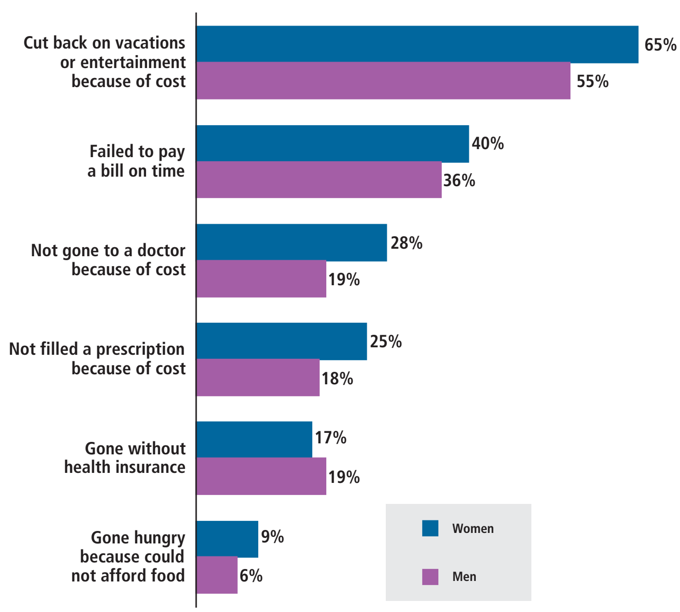
Black and Hispanic women and single moms are especially likely to be having trouble meeting expenses, and they're more likely than other adults to be using food stamps. A quarter of all women (25%) and 19% of men have had trouble getting or paying for medical care for themselves or family members in the past year.

Nearly four in 10 Hispanic women (39%) and 29% of Hispanic men have had these difficulties, as have 25% of Black women and 28% of Black men. Almost four in 10 single moms (38%) have had problems getting medical care for themselves or their families.

White women are twice as likely as White men to say they've had trouble paying their rent or mortgage in the past year (21% vs. 10%), while Black women and men are about equally likely (33% vs. 28%), and Hispanic women are less likely than Hispanic men to say so (31% vs. 38%).

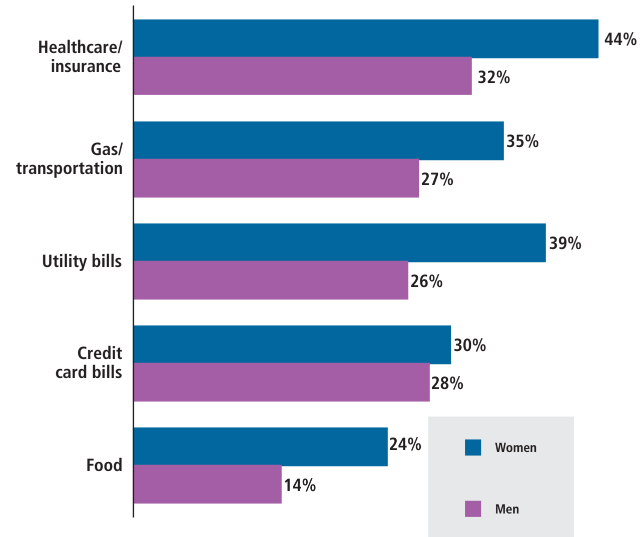
SOURCE: "Women and Men Living on the Edge: Economic Insecurity After the Great Recession, An IWPR/Rockefeller Survey of Economic Security," October 2011, Institute for Women's Policy Research, Jeffrey Hayes, Ph.D., Senior Research Associate, 1200 18th St., NW, #301, Washington, DC 20036; 202-785-5100; hayes@iwpr.org; www.iwpr.org.

FINANCIAL DIFFICULTIES AMERICANS HAVE HAD IN THE PAST YEAR, BY GENDER



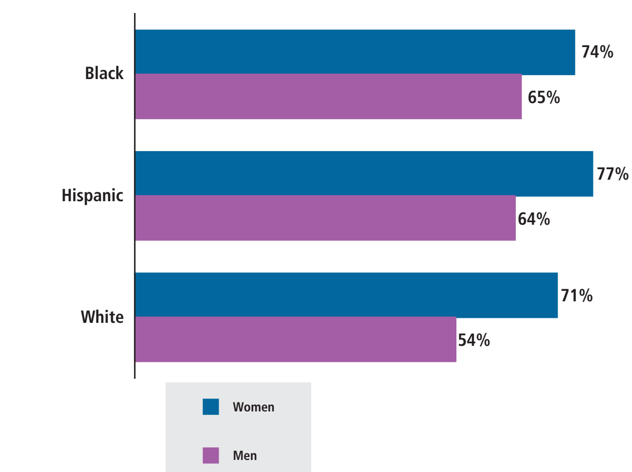
SOURCE: Institute for Women's Policy Research

CURRENT TROUBLES AFFORDING BASICS, BY GENDER



SOURCE: Institute for Women's Policy Research

AMERICANS WHO HAVE HAD TO CUT BACK ON THEIR HOUSEHOLD SPENDING IN THE PAST YEAR, BY GENDER AND RACE/ETHNICITY

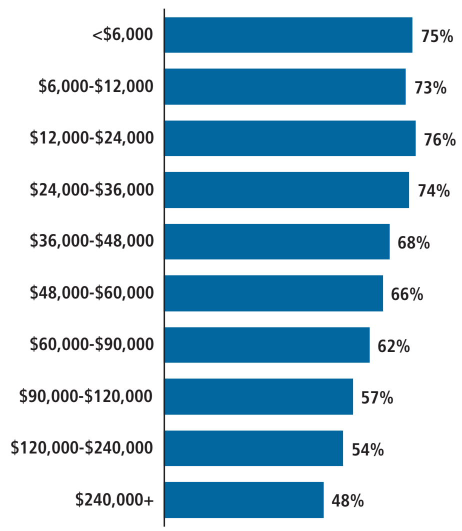


SOURCE: Institute for Women's Policy Research

Even High-Income Americans Are Scaling Back On Spending

More than two thirds of Americans (68%) say they're cutting back on their weekly spending as of June 2011, according to Gallup. This percentage is on par with June 2010 but represents a 4% drop in cutting back since May 2011 (calculations by Research Alert). Spending and saving behaviors vary significantly by income, but even high-income households are likely to say they're cutting back on spending.

AMERICANS WHO ARE CUTTING BACK ON WEEKLY SPENDING, BY HOUSEHOLD INCOME, JUNE 2011



SOURCE: Gallup

SOURCE: "Americans Still Cutting Back, But Slightly Less As Summer Starts," Gallup Daily Tracking, September 2010-May 2011, Frank Newport, Ph.D., Editor in Chief, *Gallup Daily News,* 502 Carnegie Center #300, Princeton, NJ 08540; 609-924-9600; www.gallup.com. Price: Available online at no charge.

Americans Plan To Save, Not Spend Tax Refunds

Two thirds of Americans (66%) expect to receive income tax refunds this year, according to BIGresearch. Adults ages 25-34 (81%) and 18-24 (75%) are most likely to be expecting refunds, while those ages 65 and older are least likely (46%).

Of those who anticipate getting refunds, 42% will put the money into savings, and an equal number will use it to pay off debts. Three in 10 will use it for everyday expenses, while 13% plan to make major purchases and 12% plan to take vacations (multiple responses allowed).

SOURCE: BIGresearch, February 2011, Phil Rist, EVP Strategic Initiatives, 450 West Wilson Bridge, #370, Worthington, OH 43085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com

Most Adults Use Online Banking

Nearly eight in 10 U.S. consumers (79%) visit their banks' websites daily or weekly, according to Mintel. More than a third (35%) of adults say online banking is their favorite way to handle transactions, while 25% still prefer to go to the branch, according to American Bankers Association data cited.

A quarter of adults have accounts with Internet-only banks as well as accounts with brick-and-mortar banks; 3% have accounts solely at Internet banks, according to Mintel.

When asked why they don't use Internet-only banks, consumers say they're concerned about security, followed by customer service-related issues such as ATM fees and ease of depositing or cashing checks.

Four in 10 consumers (40%) have paid their bills online using their banks' websites in the past six months, and a third primarily use this method. More than six in 10 (62%) have paid with paper checks in the past six months.

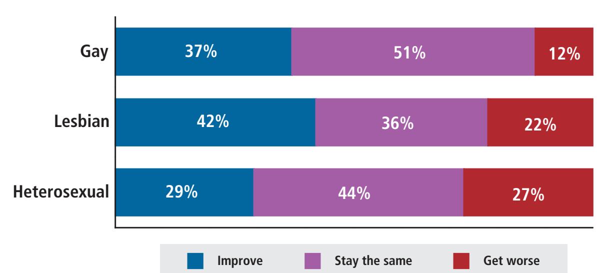
More than three quarters (78%) are satisfied with their banks' online banking services. If their banks began charging fees for online bill paying services, 80% of consumers would stop using the services. Only 7% say they'd be willing to pay $5 per month for online bill paying, and 5% would pay $10.

SOURCE: "Online Banks – U.S. – February 2011," Mintel International Group, Susan Wolfe, VP of Financial Services, 351 W. Hubbard St., #801, Chicago, IL 60654; 312-628-7946; swolfe@mintel.com; www.mintel.com. Price: £2,463 ($3,975).

Gays/Lesbians Are Optimistic About Economy

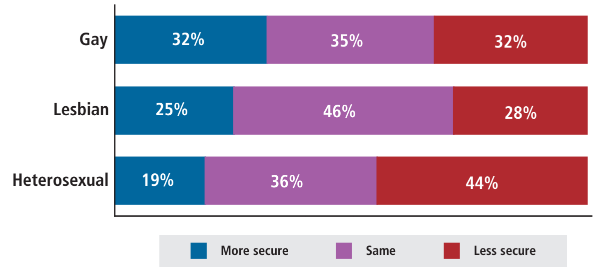
Gay and lesbian consumers (39%) are more likely than heterosexual consumers (29%) to believe the economy will improve in 2011, according to Witeck-Combs. One reason for gay and lesbian optimism is that they are more likely than heterosexuals (30% vs. 19%) to feel financially secure.

LGBT VIEW OF THE U.S. ECONOMY IN 2011 VS. 2010



SOURCE: Witeck-Combs

LGBT VIEW OF PERSONAL FINANCIAL SECURITY IN 2011 VS. 2010



SOURCE: Witeck-Combs

SOURCE: "Lesbians and Gays Remain More Hopeful About U.S. Economy And Personal Finances," Witeck-Combs Communications, Bob Witeck, CEO, 2120 L St. NW, #850, Washington, DC 20037; 202-887-0500; bwiteck@witeckcombs.com; www.witeckcombs.com.

Public's Trust In Institutions Erodes

Public trust in major institutions — business, government, media, and non-governmental organizations — in the U.S. declined sharply between January 2010 and January 2011, according to Edelman's Trust Barometer.

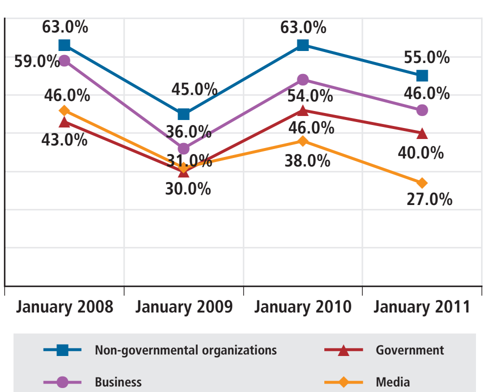
The U.S. was the only country out of the 10 surveyed in which trust in institutions declined across the board.

The study attributes the loss of confidence in institutions to a convergence of economic, political, and social factors, such as high unemployment, product safety recalls, the Gulf oil spill, and the S.E.C. suit against Goldman Sachs.

Looking at specific industries, Americans' trust that U.S. banks will do "what is right" dropped 46 percentage points between 2008 and 2011 to just 25%. Trust in automotive companies rose 17 points during that time to 32%. Trust in technology companies remained fairly high, only dropping from 78% in 2008 to 73% in 2011.

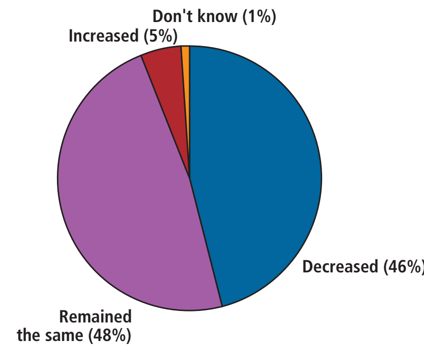
Worldwide, independent academics and other experts are considered the most credible sources of infomation about

U.S. PUBLIC'S TRUST IN MAJOR INSTITUTIONS, 2008-2011



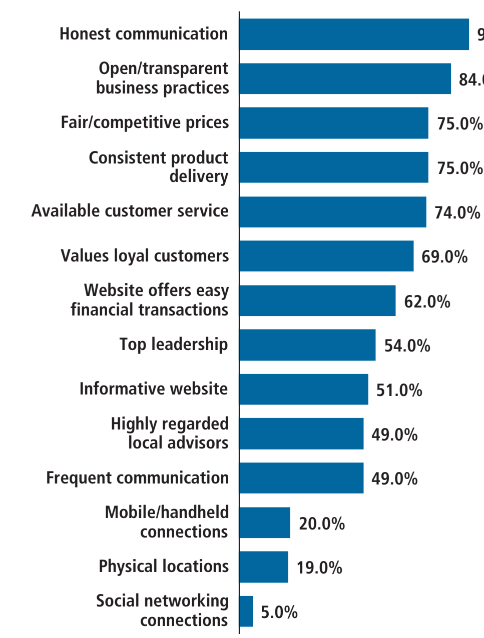
SOURCE: Edelman

INDIVIDUAL INVESTORS' TRUST IN U.S. FINANCIAL SERVICES COMPANIES, 2010 VS. 2009



SOURCE: Edelman

WHAT INDIVIDUAL INVESTORS CONSIDER IMPORTANT TO OVERALL REPUTATION OF A FINANCIAL SERVICES COMPANY



SOURCE: Edelman

companies (70%), followed by company technical experts (64%), financial or industry analysts (53%), and company CEOs (50%).

Companies that have established a base of trust with consumers enjoy a halo effect in times of difficulty. Only a quarter of people worldwide (25%) will believe negative information about a company they trust after hearing it one or two times, but 57% will believe negative information about a company they don't trust.

Nearly half of U.S. individual investors with incomes of at least \$50,000 and \$10,000 in investable assets say their trust in financial institutions has declined in the past year, according to a separate Edelman study. Of those whose trust has declined, 57% cite "greedy" behavior on the part of financial companies as the chief cause.

About half (49%) say they trust financial institutions in general. Community and regional banks are most-trusted; private equity firms are least-trusted.

Investors believe the most credible sources of financial information are brokers, advisors, agents, or bankers (37%); portfolio managers (15%); friends or family (14%); and news media (12%). Fewer than one in 10 believe corporate communications or senior executives at financial services companies are credible.

Despite these views, 62% cite national news outlets and 48% cite financial services companies' websites as the sources of financial information they use most regularly.

Word-of-mouth has impact, as well; 54% say they share financial information with others at least once a month. Men are more likely than women to share financial information (12% of men share it daily, compared to 6% of women), and face-to-face communication is the most common method (94%).

SOURCES: "Trust in U.S. Financial Services Survey, 2011," Edelman, Jeff Zilka, GM, Financial Communications & Investor Relations, 200 E. Randolph St., 63rd Fl., Chicago, IL 60601; 312-240-3389; jeff.zilka@edelman.com; www.edelman.com. Also, "2011 Edelman Trust Barometer," Latraviette Smith, SVP Global Communications; latraviette.smith@edelman.com. Price: The U.S. Financial Services study and key findings from the Trust Barometer are available online at no charge.

Recession Hit Hispanic And Black Households Hardest

The gap in wealth between White non-Hispanic consumers and Hispanic and/or Black consumers is higher than at any time since 1984, according to Pew Research Center analysis of U.S Census data. The median wealth of White households is 20 times that of Hispanic households and 18 times that of Black households (wealth is defined as value of total assets minus debts).

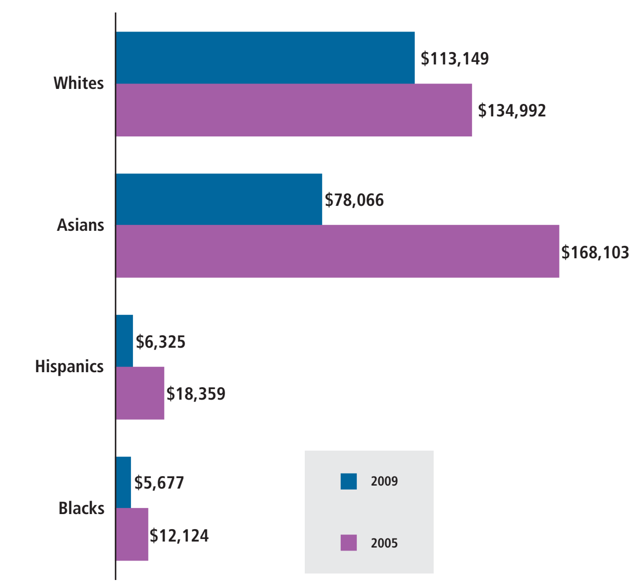
More than three in 10 Black (35%) and Hispanic (31%) households had zero or negative net worth in 2009, compared with 15% of White households [2009 data was recently released by the U.S. Census Bureau].

The recession and decline in home values between 2006 and 2009 hit Hispanic, Black, and Asian households harder than White households, resulting in a 66% decrease in median net worth among Hispanic households, a 54% decrease among Asian households, and a 53% decrease among Black households, compared to a 16% decrease among White households.

One reason for the significant decline in Hispanics' net worth is the geographic concentration of Hispanic Americans in California, Florida, Nevada, and Arizona — areas hit hardest by declining home values. The median level of home equity among Hispanic homeowners dropped by half between 2005 and 2009 — $99,983 to $49,145. Asian homeowners, also concentrated in California, were similarly affected.

Home equity values among Black and White homeowners declined as well, but not as precipitously: Blacks' median home equity declined from $76,910 to $59,000, and Whites' declined from $115,364 to $95,000.

MEDIAN NET WORTH OF U.S. HOUSEHOLDS, 2009 VS. 2005, BY RACE/ETHNICITY



SOURCE: Pew Research Center

Homeownership among Hispanics dropped from 51% to 47% between 2005 and 2009, and that among Blacks declined from 47% to 46%, while ownership among Whites stayed consistent at 74%.

The decline in wealth among Asians — whose net worth was highest of all groups in 2005 — was also affected by high immigration levels between 2004 and 2009. Median net worth in 2009 among Asians who were not recent immigrants was $116,555 — a 31% decline since 2005.

SOURCE: "Wealth Gaps Rise to Record Highs Between Whites, Blacks and Hispanics," Pew Research Center, Paul Taylor, Director, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4372; info@pewsocialtrends.org; www.pewsocialtrends.org

Blacks Have Hopeful Outlook On Finances

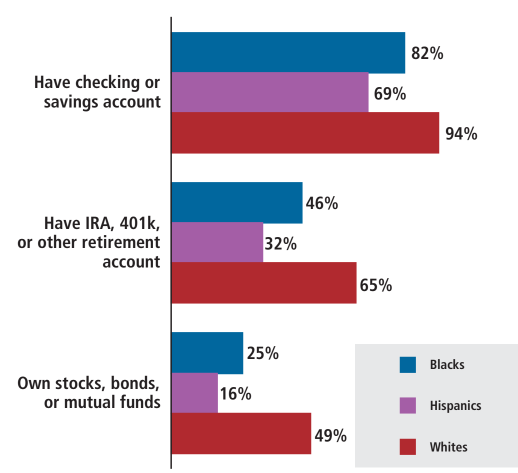
Blacks are more likely than either Hispanics or Non-Hispanic Whites to be optimistic about their personal finances, finds a study by *The Washington Post*, Kaiser Family Foundation, and Harvard University. Fewer Blacks (43%) than Whites (56%) or Hispanics (58%) say the current economy is a source of stress for them.

Blacks (84%) are also more likely than Hispanics (79%) or Whites (73%) to say they feel hopeful about their own finances. Six in 10 Blacks (62%) expect their families' finances to improve in the next year, compared with 51% of Hispanics and 36% of Whites.

Blacks are least likely to have felt the need to cut back on entertainment, vacation travel, or dining out in order to save money, and most likely to have loaned money to others. Hispanics (29%) are almost twice as likely as Blacks (16%) and somewhat more likely than Whites (19%) to say they've taken on more credit card debt in the past three years.

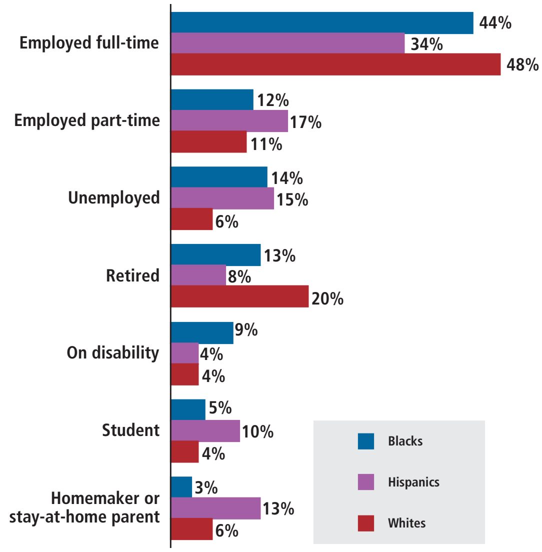
More Blacks than Hispanics or Whites have moved or otherwise changed their living situations to save money.

OWNERSHIP OF FINANCIAL INSTRUMENTS, BY RACE/ETHNICITY, 2011



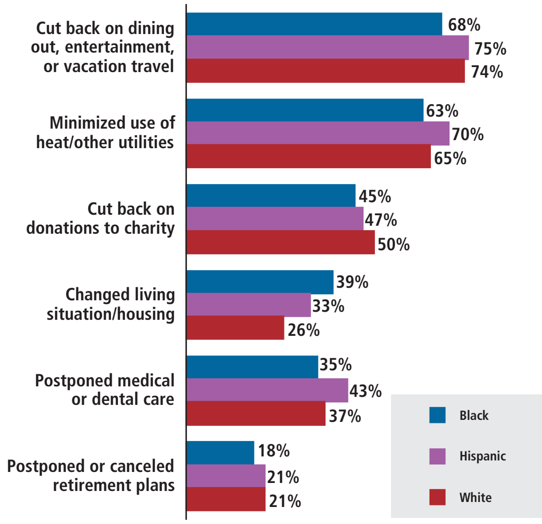
SOURCE: *The Washington Post*/Kaiser Family Foundation/Harvard University

CURRENT EMPLOYMENT STATUS, BY RACE/ETHNICITY, 2011



SOURCE: *The Washington Post*/Kaiser Family Foundation/Harvard University

STEPS TAKEN TO SAVE MONEY IN PAST THREE YEARS, BY RACE/ETHNICITY, 2011



SOURCE: *The Washington Post*/Kaiser Family Foundation/Harvard University

Hispanics are least likely to feel financially secure — 52% feel very (12%) or somewhat (40%) secure, compared to 65% of Blacks (16% very and 49% somewhat) and 67% of Whites (17% very and 59% somewhat). Hispanics (34%) are much more likely than Blacks (22%) or Whites (18%) to feel that they're falling behind financially.

Hispanics (39%) are more likely than either Blacks (27%) or Whites (21%) to say that they or a family member have been laid off in the past year.

Blacks and Hispanics are less likely than Non-Hispanic Whites to own investments such as stocks or mutual funds, or to hold retirement accounts such as 401ks or IRAs.

SOURCE: "Race and Recession Survey, February 2011," *The Washington Post*/Kaiser Family Foundation/Harvard University, Kaiser Family Foundation, Mollyann Brodie, Ph.D., SVP for Executive Operations and Director, Public Opinion & Survey Research, 2400 Sand Hill Rd., Menlo Park, CA 94025; 650-854-9400; mbrodie@kff.org; www.kff.org. Price: Toplines may be downloaded free of charge: http://www.kff.org/kaiserpolls/8159.cfm

Hispanic Business Owners Lack A Financial Strategy

The typical Hispanic business owner is male (54%), is aged 44 years, is married, and has a college degree (62%), according to the San Antonio Hispanic Chamber of Commerce. About half of Hispanic owned-businesses (51%) have revenues of less than $100,000 per year.

The vast majority of Hispanic business owners (85%) believe that having a financial plan would increase the success of their business, though only 38% have a documented strategy in place. Most (57%) wish they were more in control of their finances. Nearly half (46%) feel they don't have enough time to manage their investments.

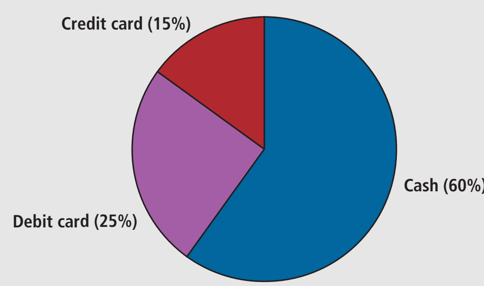
SOURCE: "Financial Planning Survey," San Antonio Hispanic Chamber Of Commerce, Randy Escamilla, 200 East Grayson, #203, San Antonio, TX 78212; 210-225-0462; randye@sahcc.org; www.sahcc.org. Price: Available upon request at no charge.

FAST FACT:

Paying With Paper Or Plastic

Hispanics aged 50 and older prefer to pay with cash.

PREFERRED METHOD OF PAYMENT AMONG HISPANICS AGED 50 AND OLDER, 2010



SOURCE: AARP Viva

SOURCE: AARP Viva Polls, Gretchen Anderson, Research Analyst, 601 E St. NW, Washington, DC 20049; 202-434-6343; www.aarp.org/viva.

Money Matters: How Much Money Teens Have, Where They Get It, And What They Purchase And Save

Teens carry an average $30 in cash and have $742.70 in their bank/savings account, according to C&R Research. Those in middle-income households earning $35-$99,000 a year carry more money and have more money in their bank accounts than teens in homes earning more than $100,000 a year ($37.70 vs $25.60, $1,304.20 vs. $618.60). Black teens have significantly less cash on them ($16.90) and saved in their bank accounts ($233.10).

HOW MUCH MONEY TEENS HAVE, BY SELECT CHARACTERISTICS, 2011

	ON THEM	SAVINGS ACCOUNT
Age		
Teen 13-15	$30.30	$720.40
Teen 16-17	$31.30	$770.60
Gender		
Boys 13-17	$31.60	$800.20
Girls 13-17	$30.10	$698.00
Household income		
<$34,000	$30.90	$747.10
$35,000-$99,000	$37.70	$1,304.20
$100,000+	$25.60	$618.60

SOURCE: C&R Research

TEEN'S FINANCIAL PORTFOLIO, 2011

Savings account	63%
ATM/debit card in own name	23%
Parent's ATM/debit card	4%
Pre-paid credit card0.	5%
Checking account	18%
Paypal, Internet account	9%
Stocks, investments in own name	8%
Major credit card in own name	4%
Parent's credit card	1%

SOURCE: C&R Research

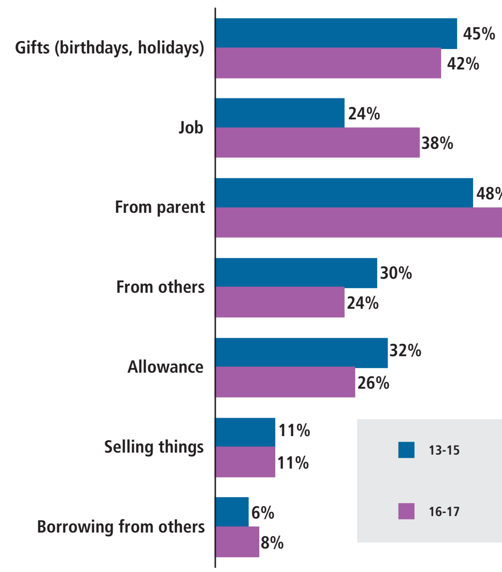
Parents gave their teens an average $17 during the week surveyed in addition to their $13.30 weekly allowance. Parents of teens 16-17 are a little more generous with the extra cash ($20.50) while parents in households earning more than $100,000 are the most stingy ($13). Teens also received $48.80 in gifts during the past month, with boys receiving more than girls ($51.90 vs. $46.40).

Money Falling From The Sky

Teens have multiple revenue streams. Four in 10 (41%) receive money as gifts and 30% have jobs. Black teens are significantly less likely than the average teen to have a job (9%) and more likely to get extra cash from a parent (64%).

There are strings attached to the money teens receive. The majority of teens (79%) have to work in order to

WHERE TEENS GET MONEY, 2011, BY AGE



SOURCE: C&R Research

receive their allowance, primarily doing household chores, cleaning their room (74%), doing homework and getting good grades (46%), and taking care of a pet (43%).

Teen boys are more likely than girls to sell "things" to get money (12% vs. 9%), whereas girls are more likely to borrow from others (9% vs. 5%). Teens also fall along gender stereotypes in that girls primarily receive money from babysitting while boys earn money from lawn and yard work.

It's worth noting that young teens are just as eager and aggressive in earning money. One in four 13-15-year-olds baby-sits and 40% earn money from running errands. "Mommy helper" is an emerging job for many tween girls, says C&R Research's Amy Henry. "I live near Philadelphia and see many 13-year-olds riding their bikes as they help these moms. It's not technically baby-sitting since the mom tends to be there, but they are just an extra hand." They also are paid relatively well at $8-$9 an hour.

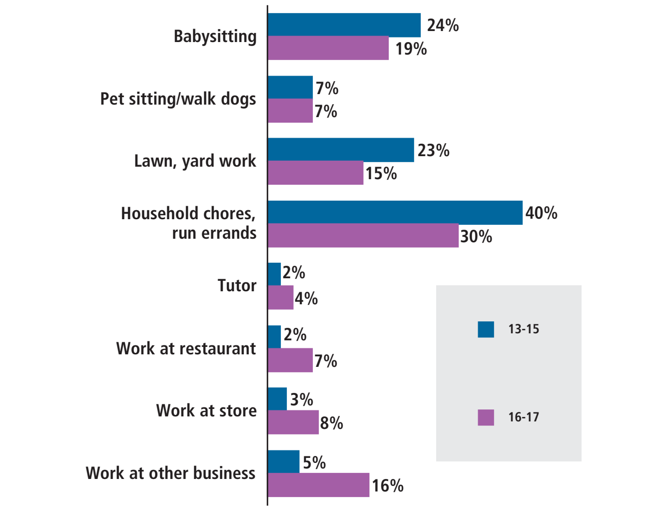
What Teens Purchase

Teens dole out the most cash on eating out, snacks, beverages, and candy. Teen girls are more than three times as likely as boys to have purchased clothing or shoes during the past week (22% vs. 6%) and twice less likely to have bought videogames (5% vs. 12%).

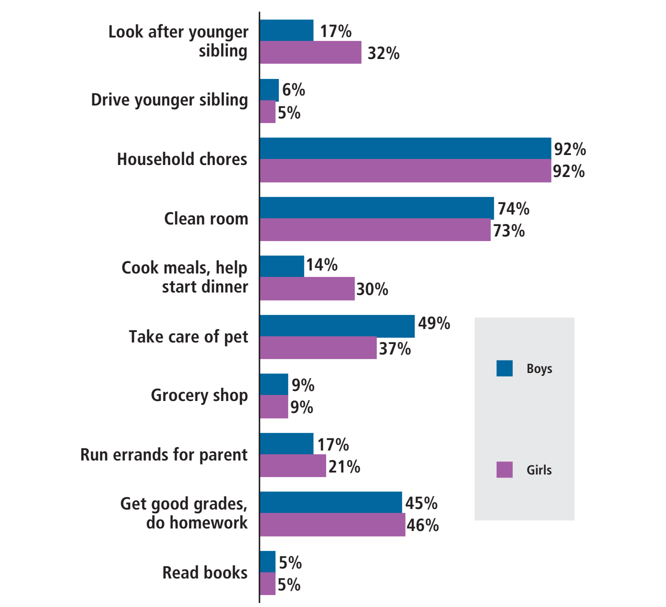
Black teens spend a little more than average going to the movies (15% vs. 11%). Middle-income teens tend to spend the most when compared to teens from higher or lower income families.

One in four teens has their own ATM/debit card (23%) and older teens are significantly more likely than younger ones to have their own checking accounts (29% vs. 9%). Black

WHAT TEENS HAVE DONE IN THE PAST MONTH TO EARN MONEY, BY AGE, 2011



CHORES BOYS, GIRLS AGE 13-17 DO TO RECEIVE AN ALLOWANCE, 2011

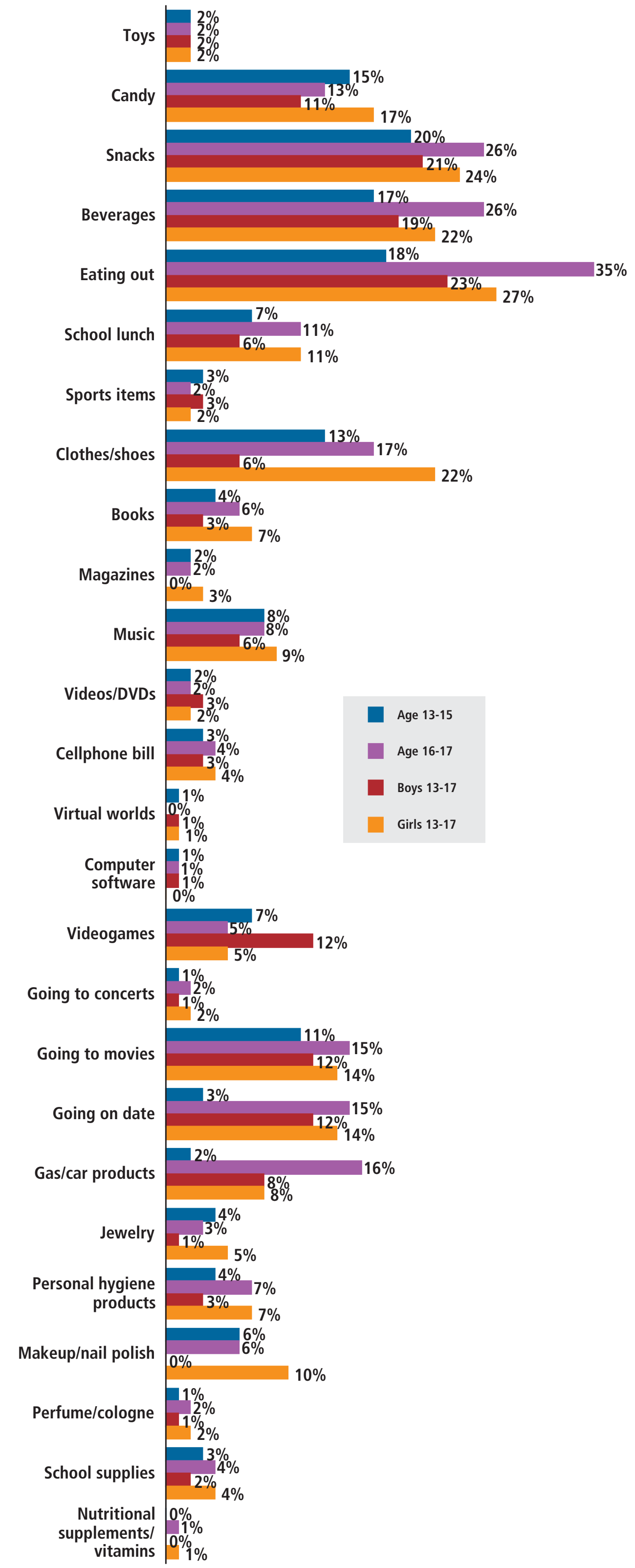


SOURCE: C&R Research

teens are twice as likely as teens in general to have an Internet or Paypal account (18% vs. 9%).

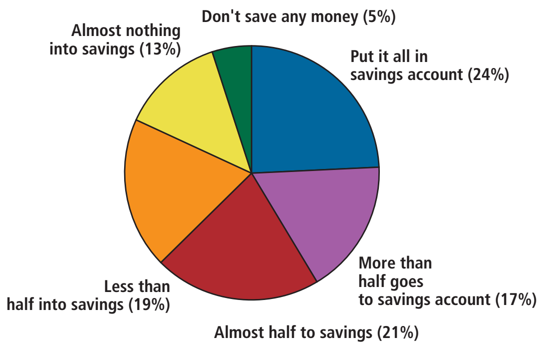
Middle class teens tend to be the most financially diverse when compared to their higher or lower income peers. Three in four middle class teens (75%) have a savings account, compared to 66% of lower and 61% of higher income teens. One in six middle class teens (15%) have stocks or investments, compared to 8% for both lower or higher class teens.

WHAT TEENS PURCHASED DURING PAST WEEK, BY AGE, GENDER, 2011



SOURCE: C&R Research

HOW MUCH MONEY TEENS SAVE, 2011



SOURCE: C&R Research

Lower (11%) and higher income teens (13%) are more likely than middle class teens (8%) to say they have a credit card instead of an allowance. However, roughly the same proportion of teens across income levels say their parents pay their credit card bills.

SOURCE: C&R Research, Amy Henry, VP Youthbeat, 500 N. Michigan Ave., Chicago, IL 60611; 312-828-9200; amyh@crresearch.com; www.crresearch.com.

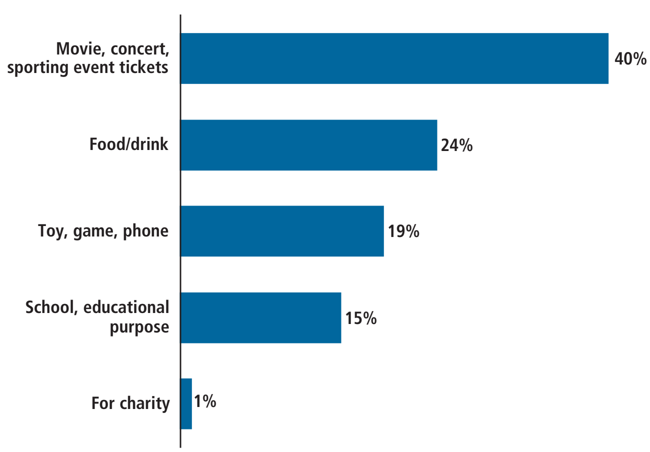
Most Kids Get Extra Money From Parents

Two in three kids under age 18 (66%) "always" receive extra money beyond their allowance when they ask their parents, according to Northwestern Mutual Foundation's TheMint.org. The most common reason kids seek extra money is to buy movie, concert, or sporting event tickets (40%), followed by food or beverages (23%), and toys, games, or a phone (19%).

Parents of today's children claim they are more generous with money than their own parents were. Only 12% of those 18-45 and 8% of those 46-59 were "always" given extra money when they asked their parents. Parents also say they used their money for less superficial purchases. Nearly half of those over age 60 said their extra money was used to purchase an item for school or education purchases, compared to 15% of today's teens and children who use their money for those purposes.

SOURCE: Northwestern Mutual Foundation, TheMint.org, Janie Schiltz, Director, 720 East Wisconsin Ave., Milwaukee, WI 53202; 414-271-1444; www.northwesternmutual.com.

WHAT KIDS BUY WITH EXTRA MONEY RECEIVED FROM PARENTS



NOTE: Extra money is defined as anything outside of an allowance

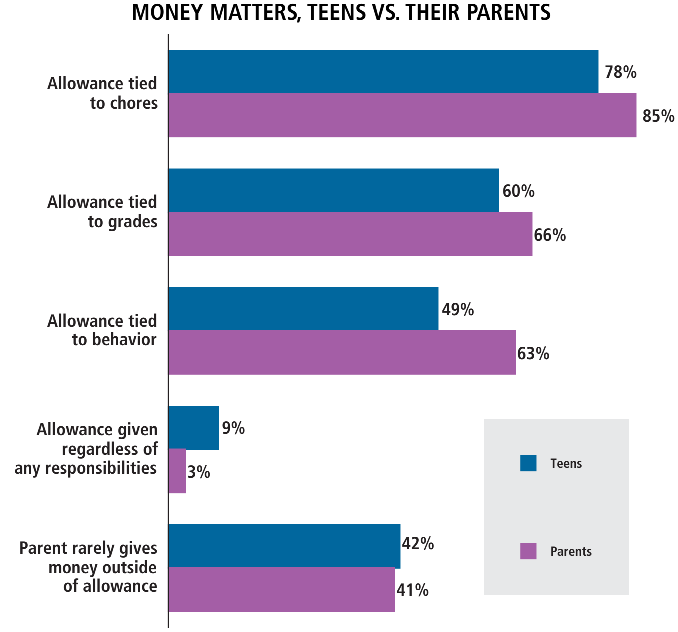
SOURCE: Northwestern Mutual

Teens Get $66 Each Month From Parents

More than half of parents (55%) give their teens an allowance, according to American Express. Teens, on average, receive $66 per month from their parents taking into account their allowance, money for food and clothes, and extra spending cash.

Almost half of teens (49%) say that having to ask their parents for money is a "hassle," according to American Express. Parents also are uneasy discussing money matters with their teens. One in three (36%) feel talking to their teens about an allowance is comparable to or more difficult than "the stressful experience of negotiating the purchase of a car."

MONEY MATTERS, TEENS VS. THEIR PARENTS



SOURCE: American Express

SOURCE: American Express, Vanessa Capobianco, 200 Vesey St., New York, NY 10285; 212-640-5445; vanessa.k.capobianco@aexp.com; www.americanexpress.com.

Teens And Money Management

More than three in four teens (77%) consider themselves knowledgeable about money management, according to Charles Schwab. Yet teens are less likely to know how to balance a checkbook or check the accuracy of a bank statement today than they were in 2007 (60% vs. 43%). They are also less knowledgeable about how to manage a credit card (64% vs. 39%), and less likely to understand how credit card interest and fees work (43% vs. 32%).

Today's teens would not fare well on *The Price Is Right* game show either. They are more likely to know exactly what an iPod costs than the price of a gallon of milk or the total of their monthly cellphone bill. Half have "no idea" how much car insurance costs, even though saving for a car is a top priority for them. One in three say their parents have discussed the importance of participating in a 401K or retirement plan once they get their first job, but only 17% know exactly what a 401K plan is.

In light of the recession, 64% of teens are more grateful for what they have and 58% are less likely to ask their parents for things they want. A majority also have a greater appreciation for their parents' hard work, and 39% say they appreciate their families more than they used to.

More than three in four (77%) label themselves "super savers," while the remaining 23% characterize themselves as "big spenders." Three in four (76%) say their main reason for saving is to pay for college, though 73% agree that it's important to have enough emergency savings "in case times get tough." If big spenders unexpectedly received $500, 82% would purchase music and clothes, while 69% would go out with friends.

More than eight in 10 teens (82%) say their parents have taught them the basics of money management, and 77% feel their parents are great role models when it comes to money management. When parents talk to their teens about money management, they are most likely to discuss saving, how to be a smart shopper, how to pay for college, and the importance of budgeting. The top subjects teens want to discuss with their parents are how to invest money, how to establish good credit, and their career aspirations.

SOURCE: Charles Schwab, Sarah Bulgatz, 211 Main St., San Francisco, CA 94105; 415-667-0328; sarah.bulgatz@schwab.com; www.schwab.com.

Teens On College, Finances, And Their Futures

More than eight in 10 teens (83%) believe they'll be financially independent of their parents by age 24, according to Junior Achievement and the Allstate Foundation. Nearly nine in 10 (89%) feel they'll be as financially well-off as their parents, with 75% thinking they are currently budgeting their money successfully. That said, only 39% think they are using credit cards effectively.

More than nine in 10 teens (92%) learn about money management from their parents, though fewer than half (43%) actually discuss money management as a family. Teen girls are more likely than teen boys to say their parents talk to them about finances (57% vs. 48%).

Nearly all teens surveyed (97%) plan on going to college, though 66% admit that their college plans have changed due to the recession. Half are working more than they originally expected to pay for school, and 42% now plan to attend college closer to home.

SOURCES: Allstate Financial, Kate Hollcraft, 2775 Sanders Rd., Nothbrook, IL 60062; 847-402-5600; kate.hollcraft@allstate.com; www.allstatefoundation.org.

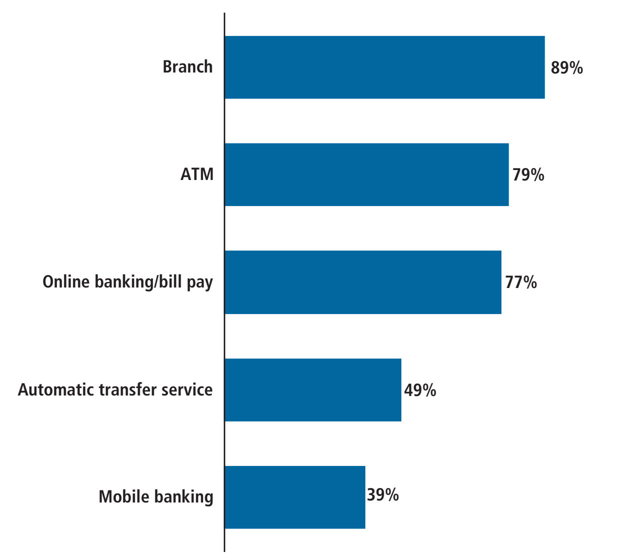
Junior Achievement, Stephanie Bell, Director Marketing, Media Relations, 1 Education Way, Colorado Springs, CO 80906; 719-540-6171; sbell@ja.org; www.ja.org.

College Students Bank Primarily In Person

Nine in 10 college students (89%) visit a bank branch at least once a month, according to Synergistics Research. Three in four use ATMs (79%) or online banking (77%) at least once a month, and half (49%) utilize a bank's automatic transfer service monthly.

HOW COLLEGE STUDENTS INTERACT WITH THEIR BANK

(% who do so at least monthly)



SOURCE: Synergistics Research

SOURCE: Synergistics Research, Genie Driskill, COO/SVP Research, 2951 Flowers Rd., #230, Atlanta, GA 30341; 404-237-3373; synergistics@src-co.com; www.synergisticsresearch.com.

Savings Accounts Are Finance 101 For Kids

Parents say teaching their children the basics of a savings account (81%) is the top financial lesson that children need to know in order to be fiscally responsible, according to online coupon website CouponCabin.com. Three in four (76%) feel imparting wisdom about bargain hunting and saving money is the most critical lesson, 73% think it's about budget creation, and 32% feel it's important to teach them about making investments.

Nearly half of parents (47%) feel it's important to teach their children about being financially savvy so they are properly prepared for the unexpected. A key way nearly half of parents (45%) teach their children money matters is through an allowance. They believe providing an allowance encourages kids to be responsible and to do their chores (78%), teaches them the value of a dollar (73%), and introduces them to the basics of budgeting (68%).

Among topics parents wish they had learned as children are the fact that credit is not just free money, how to understand student loan issues, and to start saving for retirement at an early age.

SOURCE: CouponCabin.com, Allison Nawoj, 1319 119th St., 2nd Fl., Whiting, IN 46394; 312-488-6664; anawoj@couponcabin.com; www.couponcabin.com.

factoids

➤ A slight majority of Americans (53%) are **saving for retirement**; among those who are not, they most commonly say they don't know where to start (29%). *(ING; phone: 770-980-4865)*

➤ Two thirds of consumers (66%) believe that big **banks** have lost touch with regular people, and 58% say larger banks cannot match the customer service of small banks. *(TNS; phone: 212-991-6194)*

➤ Women (46%) are more likely than men (38%) to simply want to know the **performance of their investments** or retirement accounts than to know the underlying reasons for success or failure, which may explain why men (59%) are more likely than women (51%) to say they have learned from their investment mistakes. *(Charles Schwab; phone: 415-667-0475)*

➤ Nearly eight in 10 Americans in their 20s (79%) feel overwhelmed by their **financial situation**, and 57% are at least somewhat dependent on their parents to pay bills. *(American Express; phone: 212-640-2274)*

➤ Two thirds (66%) of Americans are tired of being **frugal** but believe they have to continue doing so. *(National Foundation for Credit Counseling; phone: 940-691-6322)*

➤ Four in 10 adults (40%) think doing their own **taxes** is more dangerous than cutting their own hair. *(OfficeMax; phone: 630-438-7800)*

➤ More than four in 10 Americans (45%) have brought lunch from home in the past six months as a way of **saving money.** *(Harris Poll, March 2011; phone: 585-272-8400)*

➤ Half of women ages 65 and older rely on **Social Security** for 80% or more of their income. *(Institute for Women's Policy Research; phone: 202-785-5100)*

➤ Nearly a quarter (24%) of Americans describe themselves as "**upwardly mobile**, while 44% label themselves as "poor" or "working class." *(Citibank; phone: 212-559-1000)*

➤ Four in 10 Americans (41%) say their **credit scores** are 700 or higher; 11% say theirs are 550 or lower. *(Western Union; phone: 720-332-1000)*

➤ Nine in 10 college students (89%) visit a **bank branch** at least once a month. *(Synergistics Research; phone: 404-237-3373)*

➤ Nearly half of Americans (47%) say they wouldn't be able to raise $2,000 **cash** within 30 days without selling some of their possessions. *(National Bureau of Economic Research; phone: 617-868-3900)*

➤ The average annual **income** in 2010 was $44,000 for men, and $31,000 for women. *(GfK MRI; phone: 212-884-9200)*

➤ More than a third of consumers are skimping on **groceries** they would normally buy, to help make up for the high cost of gasoline. *(TNS; phone: 877-541-9930)*

➤ Almost a quarter of Americans (24%) have cut back on their use of **dry cleaning** services as a way to save money. *(Harris Poll; phone: 585-272-8400)*

➤ Household with working moms have an average annual **income** of $81,900, compared to $73,400 for overall households. *(Scarborough Research; phone: 646-654-8400)*

➤ Two thirds of U.S. **$100 bills** in circulation are currently outside the U.S. (Fast Company*; phone: 212-389-5300)*

➤ More than nine in 10 U.S. adults (95%) think they do a better job of managing their **personal finances** than Congress does of managing its budget. *(BIGresearch; phone: 614-846-0146)*

food & beverages

Nearly nine in 10 Americans think grocery prices have increased recently, and almost a quarter are worried about having enough money to feed their families in the coming year. More than a third of Americans — and more than four in 10 Hispanics and Blacks — know someone who has gone hungry in the past year. The majority of Americans believe that older adults often have to choose between paying for prescriptions and buying food. Coupons and circulars are increasingly popular, as Americans look for ways to stretch their food budgets.

Spending on groceries is up, due not only to rising food prices, but also to consumers' desire to save money and have greater control over nutritional content and food preparation by eating at home more often. Although the majority of adults prefer organic foods — and sales of organics are growing, while sales of conventional foods are flat — price is a deterrent.

Almost half of parents claim to always choose healthy foods for their kids, but kids often resist. Younger children eat predominantly healthy snacks, for example, but gravitate toward potato chips, candy, and ice cream as they get older. Likewise, most elementary school-age kids eat breakfast daily, but only half of middle-schoolers do. Among teens, healthy eating habits tend to be clustered with other healthy habits; those who are physically active eat more vegetables and fruit and drink less soda than their more sedentary peers.

Once they're out of the house, college students skip meals frequently and only eat four or five servings of fruits and vegetables per week. Their older counterparts don't do much better; just over half describe the foods they buy as healthy/nutritious. There's increasing awareness of the importance of good nutrition in maintaining overall health, but intentions and actions are often at odds. There are also differences between how consumers choose what they eat at the grocery store and what they eat in restaurants. While they're not unaware of health concerns when dining out, health is construed more generally when someone else is doing the cooking — such as choosing grilled menu items over fried. Ultimately, in restaurants, taste takes priority over health.

Most Adults Drink; Beer Is Clear Favorite

Nearly three in 10 U.S. adults (29%) drink alcohol at least once a week, including 10% who drink weekly and 5% who drink daily, according to Harris Interactive.

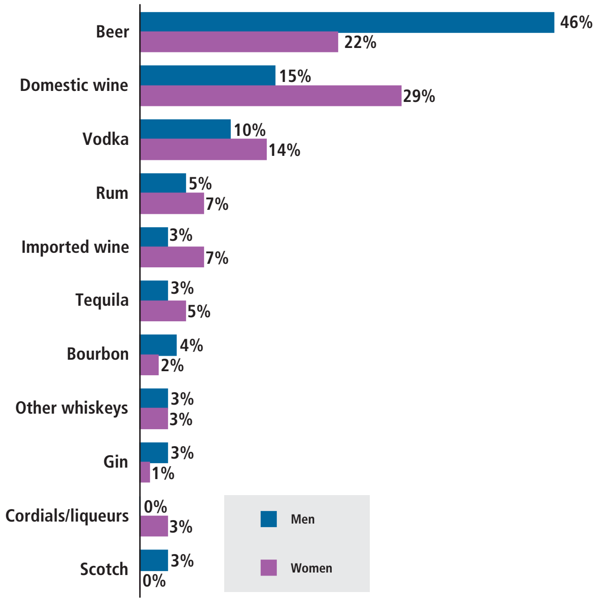
Just under half (49%) drink at least once a month. Only 22% never drink at all. Men drink more regularly than women; 38% of men drink at least once a week, compared with 21% of women.

Beer is the most widely consumed alcoholic beverage; 63% of those who drink at least several times a year choose beer when they drink, while 54% choose domestic wine. Only 28% drink imported wine — the same proportion who drink tequila. Four in 10 (41%) drink vodka, and 34% drink rum.

Beverage choice differs by gender: men have a strong preference for beer, while women prefer wine. Age also affects drink preferences. Consumers ages 21-46 (Gen Y and Gen X), favor beer, while Boomers are more evenly divided between beer-lovers and wine aficionados. Adults ages 66 and older favor domestic wines.

SOURCE: Harris Poll #46, April 2011, Harris Interactive, Regina Corso, SVP Public Relations and Youth Research, 161 Sixth Ave., New York, NY 10013; 585-214-7412; info@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

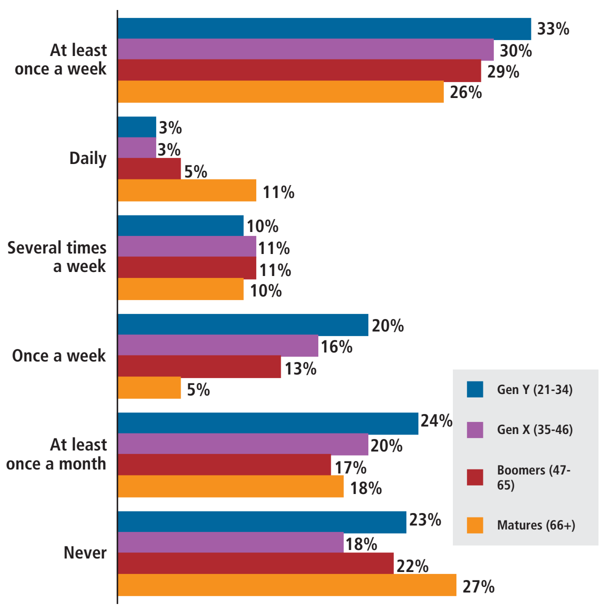
MOST FREQUENTLY CONSUMED ALCOHOLIC BEVERAGES, BY GENDER



NOTE: Adults who drink at least several times a year were asked to choose the one drink they have most often.

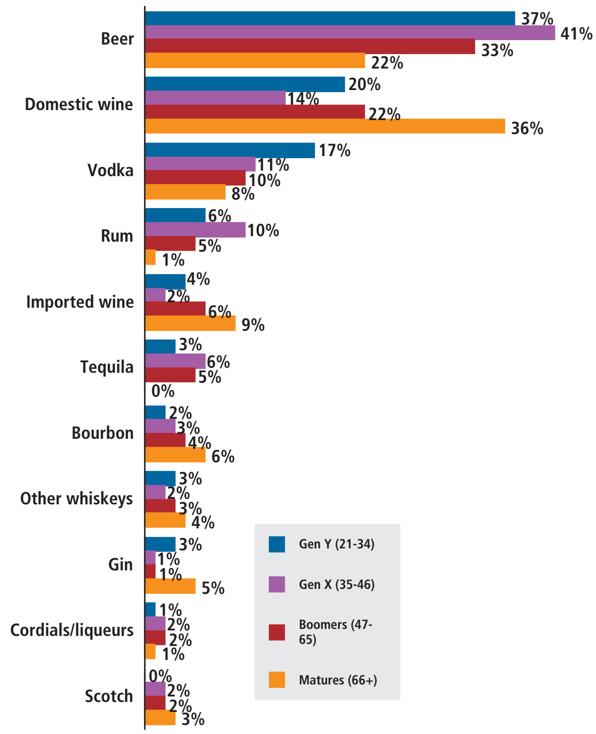
SOURCE: Harris Interactive

HOW OFTEN U.S. ADULTS DRINK ALCOHOL, BY GENERATION



SOURCE: Harris Interactive

MOST FREQUENTLY CONSUMED ALCOHOLIC BEVERAGES, BY GENERATION



NOTE: Adults who drink at least several times a year were asked to choose the one drink they have most often.

SOURCE: Harris Interactive

Americans Know Good Nutrition — In Theory

Americans are knowledgeable about nutrition and its role in weight management, but that doesn't necessarily translate into healthy eating habits, finds Harris Interactive. Americans say freshness (89%), fiber content (81%), whole grain content (81%), and fat content (80%) are their top considerations when buying food and beverages. When asked what's most important to manage weight, they cite protein (83%), fat (81%), whole grain (81%), calories (80%), and saturated fat (79%).

More than three quarters (76%) of Matures (age 66+) have some kind of dietary restriction, compared to 58% of Boomers (47-65), 50% of Gen Xers (35-46) and 51% of Echo Boomers (18-34).

When asked about how their food is produced/sourced, there's considerable interest in locally sourced produce (71% consider this important), environmentally friendly packaging (65%), and antiobiotic-free meat (61%) — organic foods are at the bottom of the list (42%).

SOURCE: Harris Poll #52, April 27, 2011, Harris Interactive, Andrew Compagno, Research Manager, Consumer Goods, Restaurant and Retail Research, 161 Sixth Ave., New York, NY 10013; 585-214-7412; info@harrisinteractive.com; www.harrisinteractive.com

Adults Intend To Eat Healthy

When it comes to practicing healthy habits, Americans have good intentions but mediocre follow-through, according to The NPD Group. More than six in 10 adults (62%) intend to exercise regularly, but fewer than half (46%) actually do so. More than half (56%) plan to limit their calorie intake, but only 38% actually do.

Four in 10 (44%) plan to eat small, frequent meals rather than fewer large ones, but only 29% actually put this into practice. Motivations for practicing healthy eating and exercise habits differ by age; younger consumers are more likely to be motivated by a desire to lose weight, while older consumers simply want to feel good. The desire to live longer is a top motivation for adults of all ages.

SOURCE: "Healthy Eating Strategies by Generations," The NPD Group, Dori Hickey, Director of Product Development, 900 West Shore Rd., Port Washington, NY 11050; 516-625-0700; contactnpd@npd.com; www.npd.com

Half of Consumers Read Nutrition Labels

Just over half of consumers (51.8%) say they frequently read nutrition labels before buying food products to be sure that the products don't contain anything they wish to avoid eating, according to The NPD Group.

Label-readers are most interested in calorie content, total fat content, sugar, sodium, and proportion of total calories from fat.

Interest in nutrition has tapered off since labeling was made mandatory for packaged foods in the mid 1990s; in 1995, 64% of consumers said they frequently checked nutrition labels.

SOURCE: The NPD Group, National Eating Trends, Harry Balzer, Chief Industry Analyst, 900 West Shore Rd., Port Washington, NY 11050; 516-625-0700; www.npd.com. Price: Contact for information.

Many Are Dieting — Or Feel They Should Be

More than one in five Americans (21%) are currently dieting, and just as many believe they should be on diets, finds Baeta Corp.

Adults ages 16-34 (26%) are significantly more likely than those ages 35-54 (19%) or 55 and older (19%) to be currently dieting. Those ages 35-54 (23%) and 55 and older (25%) are more likely than 16-34-year-olds to feel that they should be dieting (16%).

Women (40%) are much more likely than men (28%) to be either currently dieting or to have dieted in the last year. Half of men (50%) say they haven't dieted in the past year and don't feel the need to, compared with 40% of women who say so.

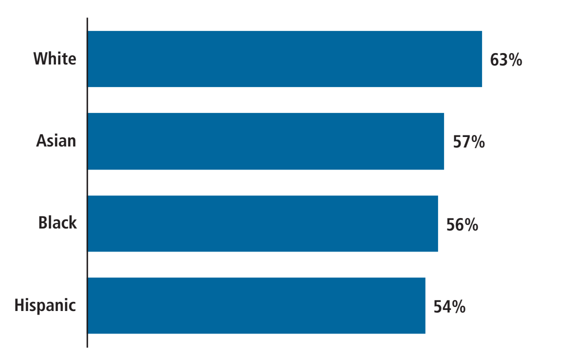
Dieters cite cravings (55), fading willpower (50%), hunger (49%), stress (44%), and a lack of timely results (31%) as their biggest challenges. More than one in 10 (13%) of Americans who tried to lose weight by dieting in 2010 eventually gave up.

SOURCE: Baeta Corp, Lee Smith, Chief Marketing Officer, 1 Bridge Plaza, Suite 275, Fort Lee, NJ 07024; 201-471-0988, x103; lee_smith@baetacorp.com; www.baetacorp.com. Price: Contact for information.

Blacks Diet For Health, Not Weight Loss

Black adults who are dieting are more likely to be doing so for health reasons than to lose weight, according to Mintel. Seven in 10 Black adults (70%) who are watching what they eat and/or limiting how much they eat say they're doing it for their general health, while 52% are trying to prevent or control high blood pressure, and 46% are trying to maintain their current weight.

DIETERS WHO ARE DOING SO TO LOSE WEIGHT, BY RACE/ETHNICITY



SOURCE: Mintel

Nearly half (49%) of Blacks who are watching what they eat have a hard time sticking to diets, and 42% believe most diets don't work. Black dieters struggle with finding healthy options at restaurants (35%), hunger pangs (26%), and being "bored" by the foods on their diets (26%). Six in 10 (60%) say they'd like to eat healthy foods more often, but that they're too expensive.

SOURCE: "The Diet of the Black Consumer – U.S., May 2011," Mintel, Leylha Ahuile, Senior Multicultural Analyst, 351 W. Hubbard St., 8th Fl., Chicago, IL 60654; 312-932-0400; info@mintel.com; www.mintel.com. Price: $3,995.

Many Adults Skimp On Breakfast

People who are overweight are more likely than those who are obese or normal weight to take steps to lose weight, according to Harris Interactive. This includes eating smaller portions, limiting carbohydrate intake, keeping track of calories, and drinking water instead of higher-calorie beverages.

Normal-weight (64%) and overweight (66%) adults are more likely than those who are obese (49%) or morbidly obese (34%) to exercise regularly.

Dinner is the most commonly eaten full meal; 37% eat a full or well-balanced dinner five or more times per week, and another 37% do so 3-4 times per week. Many adults skip breakfast or skimp on it — 22% never eat a full breakfast, and 38% eat a full breakfast only once or twice a week. More than half (55%) make do with a limited breakfast such as a cup of coffee at least once a week.

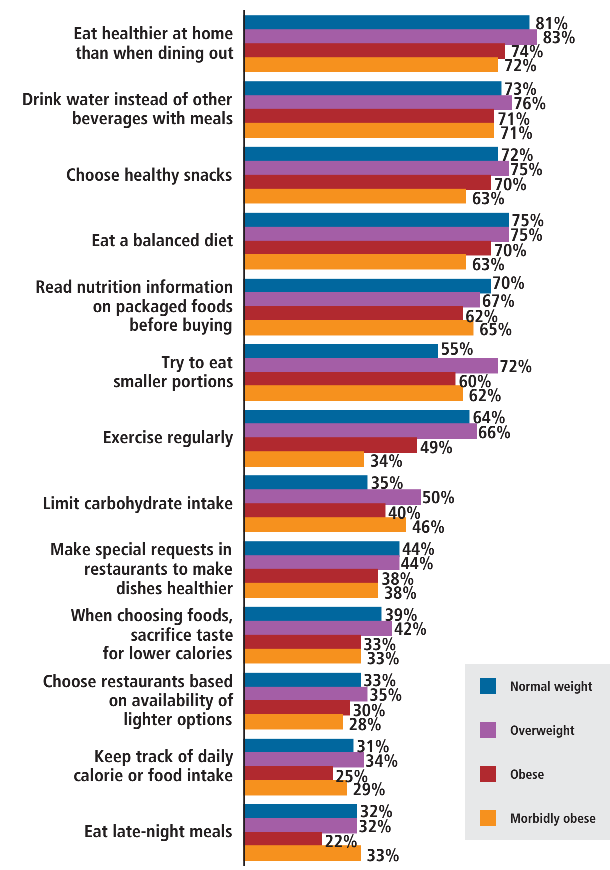
Normal-weight (22%) and overweight (29%) people are more likely than their obese (13%) and morbidly obese (17%) counterparts to eat a full breakfast five or more times a week.

Interestingly, there is little difference among various body types when it comes to how often they eat dessert. The majority eat dessert or some kind of after-dinner treat 1-2 times per week (48%) or 3-4 times per week (23%). About one in 10 (13%) eat dessert five or more times a week, and 16% never eat it.

The authors note that because the study is based on self-reported behavior, some of the data may reflect what people think they should be doing rather than their actual behavior.

SOURCE: The Harris Poll #137, Harris Interactive, Humphrey Taylor, Chairman — The Harris Poll, 161 Sixth Ave., New York, NY 10013; 585-214-7412; info@harrisinteractive.com; www.harrisinteractive.com. Price: Contact for information.

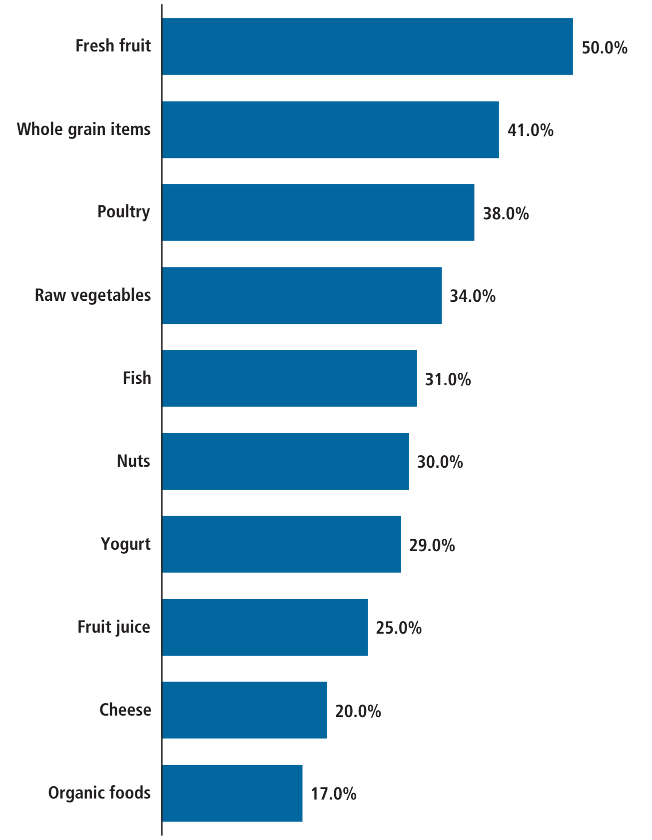
EATING AND EXERCISE HABITS OF ADULTS, BY BODY TYPE



NOTE: Body type definitions are based on Body Mass Index measurements.

SOURCE: Harris Interactive

FOODS ADULTS SAY THEY'VE BEEN EATING MORE OF IN PAST FEW MONTHS



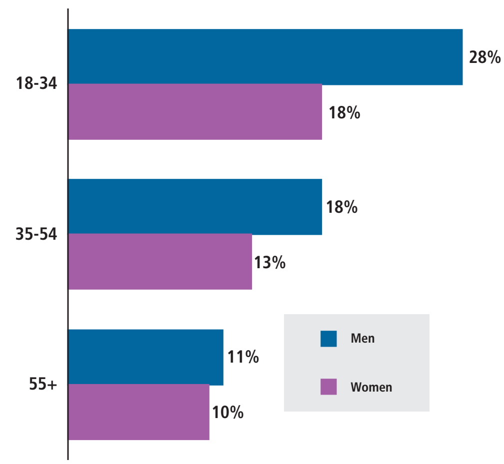
SOURCE: Harris Interactive

Men Most Likely To Skip Breakfast

More than a quarter of men under 35 (28%) skip breakfast, according to The NPD Group. Among children under 18, teenagers ages 13-17 are most likely to skip breakfast (14%). A total of 31 million Americans (about one in 10) routinely skip breakfast. Adults age 55 and older are least likely to skip.

Three quarters of Americans (of all ages) who do eat breakfast eat it at home. Women are less likely than men to go without breakfast, but those who do are more likely than men to cite time constraints as their chief reason.

U.S. ADULTS WHO SKIP BREAKFAST, BY AGE AND GENDER



SOURCE: The NPD Group

SOURCE: "Morning MealScape 2011," The NPD Group, Dori Hickey, Director, Product Management, 900 West Shore Rd., Port Washington, NY 11050; 516-625-0700; also, Kim McLynn; 847-692-1781; kim.mclynn@npd.com; www.npd.com. Price: Contact for information.

Burgers Still Dominate The Grill

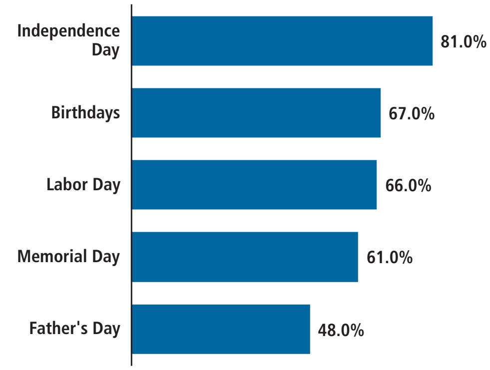
Dinner is the meal most often made on an outdoor grill, according to grill manufacturer Weber. Nearly nine in 10 grill owners (89%) say they grill dinner on a regular basis, while 35% grill lunch regularly. Only 3% cook breakfast on their grills.

Nearly all respondents grill burgers outside (96%); 93% grill beef burgers, 14% grill turkey burgers, and 6% grill veggie burgers. The most popular burger toppings are onions (62%), tomatoes (61%), lettuce and ketchup (tied at 59%), and mustard (50%).

Foods considered most challenging to cook on an outdoor grill include dessert (34%), fish or pizza (tied at 27%), shellfish (25%), and fruit (22%).

More than seven in 10 American households (71%) own outdoor grills and/or smokers. Gas grills are most popular (67%), followed by charcoal (46%). One in 10 own smokers, and 4% own outdoor electric grills (totals are higher than 100% due to ownership of multiple types). Three in 10 grill owners have two or more outdoor grills or smokers, and 5% have three or more.

MOST POPULAR HOLIDAYS FOR GRILLING



SOURCE: Weber-Stephen Products

Fewer Americans are doing their grilling away from their homes as compared to last year (53% vs. 65%). After the home, campgrounds are the next-favorite venue for grilling (37% grill there), followed by parks (28%), beaches (18%), and car tailgates (17%).

Men are the primary grillers in 61% of U.S. grilling households; women and men share the task equally in 20% of households. Almost half of grill owners (49%) say they use their outdoor grills all year round.

Grill and smoker owners cook outside an average of five hours per week; 22% say they're doing more grilling this year than last year. More than three quarters (78%) describe grilling as an "extremely" or "pretty" important activity when entertaining guests.

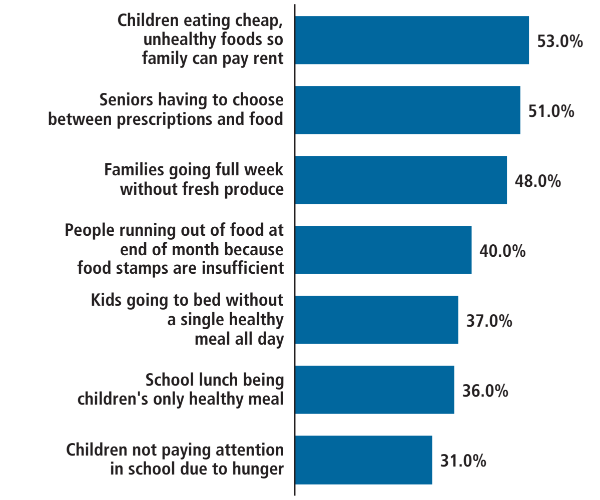
SOURCE: "2011 Weber GrillWatch Survey," Weber-Stephen Products, Jeanine Thompson, Events and Promotions Manager, 200 E. Daniels Rd., Palatine, IL 60067; 224-836-2662; jthompson@weberstephen.com; www.weber.com. Price: Contact for information.

Americans Are Worried About Hunger

Nearly a quarter of U.S. adults (24%) are very (10%) or fairly (14%) worried about having enough money to feed their families in the next year, according to the Food Research and Action Center. Women are slightly more likely than men to be worried (26% vs. 23%), and Hispanics (39%) and African Americans (31%) are more likely than Whites (21%) to be worried.

More than a third of U.S. adults (35%) say they personally know someone who has experienced hunger in the past year; nearly half (46%) of Hispanics and 43% of African Americans say so. Urban (37%) and rural (36%) residents are more likely than suburban dwellers (30%) to know someone who's struggled with hunger.

Among those with a personal connection to someone who's gone hungry in the last year, 22% say the person they



SOURCE: Food Research and Action Center

know was a friend, neighbor, or church member. About one in 10 say it was a member of their immediate (9%) or extended (8%) family, or that they themselves struggled with hunger (8%).

Half of adults (50%) say they'd be embarrassed to seek public assistance or charity to help feed themselves, and 84% think others experience embarrassment when they're in need of assistance.

SOURCE: "Hunger in America, February 2011," Food Research and Action Center, Jim Weill, President, 1875 Connecticut Ave., NW, #540, Washington, DC 20009; 202-986-2200; www.frac.org

Candy Eaters Are Less Likely To Be Overweight

Children who eat candy are less likely to be obese or overweight than their non-candy-eating peers, according to Louisiana State University research published in the journal *Food & Nutrition*.

Researchers tracked the eating habits of children ages 2-18 to compare to their height and weight. While candy consumption is linked to higher calorie intake and higher levels of sugar consumption, there's no association with weighing more. In fact, candy eaters actually have a lower risk of being overweight or obese. This may be because candy and the related sugar high cause children to be more active.

One in three children (32%) involved in the study eat candy every day, with girls consuming slightly more candy than boys. Chocolate candy eaters are likely to be older than non-chocolate candy eaters. Black children tend to eat more sugar candy and gum, while White children tend to prefer chocolate candy.

Researchers point out that the overall diets of the children in the study, regardless of candy consumption, are nutritionally poor.

SOURCE: "Association of Candy Consumption with Body Weight Measures," *Food & Nutrition Research*, 2011, Carol O'Neil, Study Author, Louisiana State University, AgCenter, Baton Rogue, LA 70803; 225-578-1631; coneil1@lsu.edu.

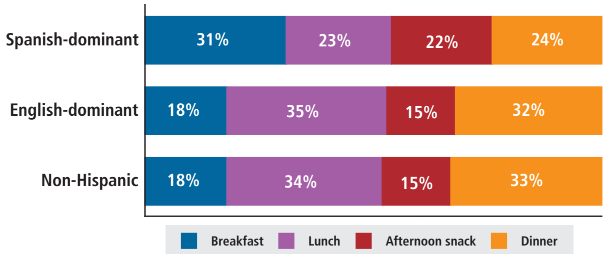
Spanish Speakers Eat Breakfast At Restaurants

Language preference affects when and how Hispanics eat at restaurants, according to The NPD Group. Hispanics who speak only or mostly Spanish are more likely than those who speak predominantly English to eat their breakfast at restaurants.

Spanish speakers are also more likely than those who primarily speak English to bring children when they eat at restaurants.

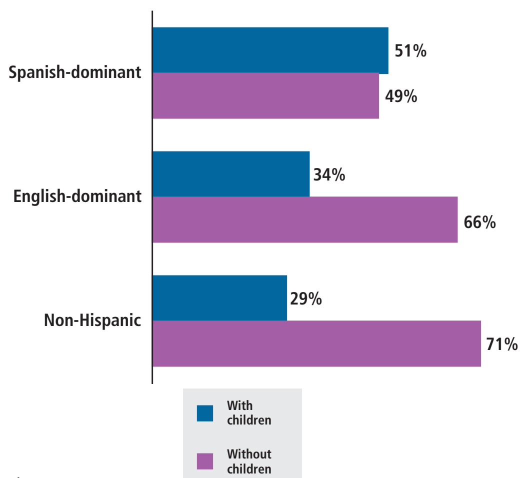
MEALS EATEN AT RESTAURANTS, BY ETHNICITY AND LANGUAGE PREFERENCE

(Specific meals as % of total restaurant meals)



SOURCE: The NPD Group

PROPORTION OF RESTAURANT MEALS EATEN WITH CHILDREN, BY ETHNICITY AND LANGUAGE PREFERENCE



SOURCE: The NPD Group

SOURCE: "CREST Hispanic Market Report," The NPD Group, Bonnie Riggs, Restaurant Industry Analyst, 900 West Shore Rd., Port Washington, NY 11050; 847-962-1767; bonnieriggs@npd.com; www.npd.com. Price: Contact for information.

In Restaurants, Taste Matters Most

When dining in restaurants, taste is the top priority in choosing what to eat, but when shopping for groceries, health takes priority, according to *The Lempert Report*.

Grocery shopping involves more exact decision-making; shoppers focus on avoiding or limiting specific foods or ingredients. At restaurants, diners think about health in more general terms, such as choosing grilled over fried items.

HOW CONSUMERS MAKE FOOD CHOICES: RESTAURANTS VS. SUPERMARKETS

PRIORITIES AT RESTAURANTS	
Taste	84%
Health	64%
Price	61%
PRIORITIES AT SUPERMARKETS	
Health	90%
Price	80%
Taste	80%

SOURCE: The Lempert Report

SOURCE: *The Lempert Report*, Phil Lempert, Editor, 3015 Main St., #320, Santa Monica, CA 90405; 310-392-0448; phil@supermarketguru.com; www.supermarketguru.com. Price: Contact for information.

Restaurant Diners Are Switching To Tap Water

Consumers are ordering more tap water and fewer other beverages when dining at restaurants, reports The NPD Group. Between 2006 and 2011, the number of servings of tap water ordered increased by 2.8 billion, while the number of servings of other beverages ordered decreased by 2.7 billion.

Tap water accounts for 10% of all beverages ordered at restaurants, while carbonated soft drinks and coffee combined make up 49%.

Restaurant patronage overall declined 1% between 2006 and 2011, while beverage orders (other than tap water) declined 6%.

Cost is a primary factor in the decline in beverage orders; consumers cite free refills as one of the reasons to order tap water. Other beverages being ordered more frequently include iced tea (which also often includes free refills), smoothies, frozen/slushy drinks, and specialty coffee drinks.

SOURCE: "Beverages at Foodservice: Satisfying Our Thirst for Beverages," The NPD Group, Bonnie Riggs, Restaurant Industry Analyst, 900 West Shore Rd., Port Washington, NY 11050; 516-625-0700; www.npd.com. Price: Contact for information.

Women Shop For Groceries More, Use More Coupons Than Men

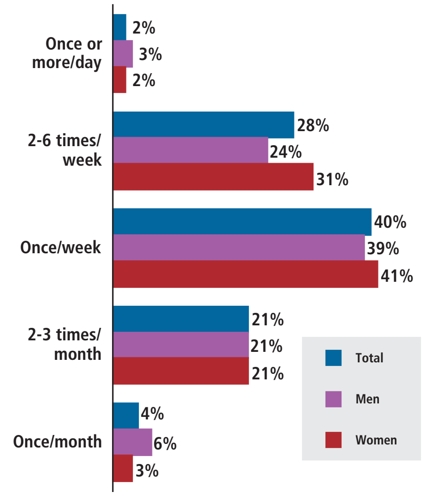
American consumers shop for groceries an average of 1.8 times per week, according to AlixPartners. Women shop more frequently than men; 74% shop once a week or more, compared to 66% of men. Women are more receptive than men are to in-store sampling — 84% of women and 74% of men say free samples and in-store coupons sometimes or always convince them to buy new products.

Six in 10 women (62%) always or almost always use a shopping list (compared with 39% of men), and 45% of women always or almost always use coupons when creating their lists (compared with 39% of men).

The majority of shoppers expect to spend as much or more on groceries in 2011 as they did in 2010. Among those who expect to be spending less, 48% say it's because their current personal financial situation makes it necessary to cut back, and 42% say it's because their other household expenses have gone up.

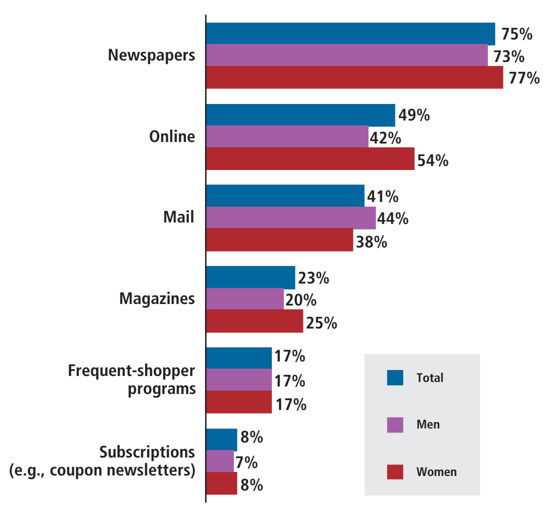
A similar proportion (41%) are cutting back because they're concerned about their economic future, and 37% say their household income has been reduced.

HOW OFTEN U.S. CONSUMERS SHOP FOR GROCERIES, BY GENDER



SOURCE: AlixPartners

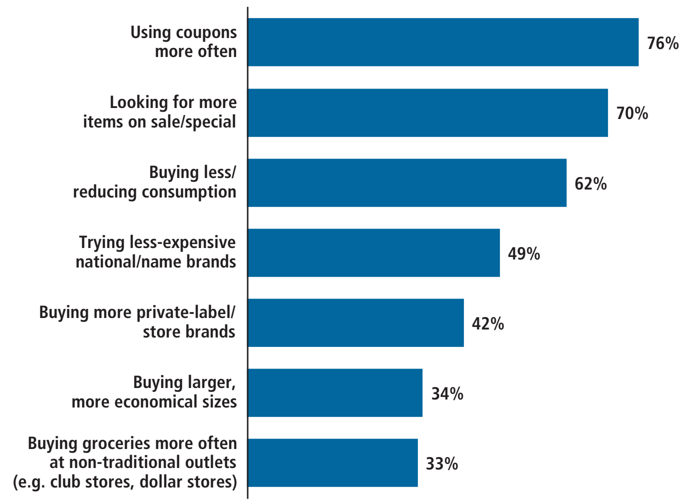
WHERE GROCERY SHOPPERS GET COUPONS, BY GENDER



SOURCE: AlixPartners

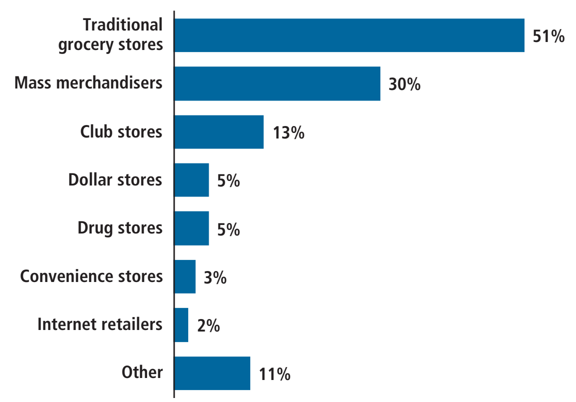
CONSUMERS' STRATEGIES FOR SAVING MONEY ON GROCERIES

(Among those who are decreasing grocery spending)



SOURCE: AlixPartners

WHERE CONSUMERS BUY THEIR GROCERIES



SOURCE: AlixPartners

SOURCE: "AlixPartners Grocery Shopper Preferences Survey," July 2011, AlixPartners, Tim Yost, Director Global Communications, 2000 Town Center, #2400, Southfield, MI 48075; 248-358-4420; tyost@alixpartners.com; www.alixpartners.com. Price: Contact for information.

Food Is Getting More Expensive, Say Grocery Shoppers

Nearly nine in 10 U.S. consumers (88%) believe food prices at grocery stores have increased recently, according to Deloitte. More than six in 10 (62%) say they've changed their buying behavior as a result — buying different brands or products, smaller sizes, or simply doing with less.

More than two thirds (67%) think food prices at restaurants are increasing, while 19% believe they're staying about the same. Almost seven in 10 (68%) say they've changed their dining out behavior in some way. Of these, 90% are simply eating out less frequently, while 24% are eating at lower-priced restaurants more than they used to and 16% are ordering less expensive items at their regular restaurants (multiple responses allowed).

More than four in 10 consumers (45%) say they've changed their food buying behavior due to high gas prices; 73% of these have cut down on the number of trips they make to food stores. Just over a third (34%) do more of their shopping at discount food stores. Others have shifted what they buy — buying lower-priced foods or fewer total items — to cut down their overall expenditures.

The majority of consumers (61%) shop for groceries 1-3 times per week; 30% shop 1-3 times a month. Supermarkets and supercenters (such as Walmart) are the top channels for food shopping.

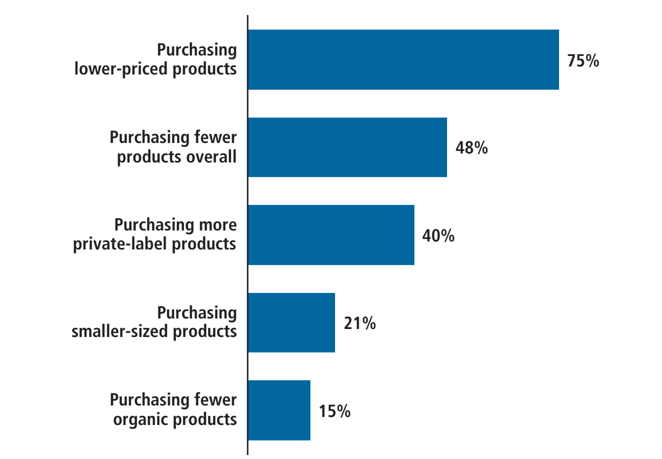
Among the 35% of consumers who own smartphones or other web-enabled mobile devices, a third (33%) have used these devices for grocery shopping activities while in the store.

Three quarters of consumers (76%) say they're increasingly on the lookout for healthy options when they're buying groceries. Grocery shoppers express the strongest interest in high-fiber, low-sugar, low-salt, low-calorie, and low-carb foods. They're less interested in organic foods and fully prepared meals.

SOURCE: "2011 Consumer Food and Product Insight Survey Part Two," July 2011, Deloitte, Courtney Flaherty, Retail, 333 Ludlow St., Stamford, CT 06902; 203-905-2708; cflaherty@deloitte.com; www.deloitte.com. Price: Available online at no charge.

HOW CONSUMERS HAVE CHANGED THEIR GROCERY SHOPPING HABITS DUE TO RISING PRICES

(Multiple responses allowed)



SOURCE: Deloitte

Consumers Up Grocery Spend, Trim Dining Out

Nearly half of Americans (48%) spend $106 or more per week on groceries, up from 43% who did so in 2010, according to the National Grocers Association. The increase reflects a shift toward eating at home instead of dining out, as consumers look for ways to economize while still eating well. More than nine in 10 Americans (92%) eat at home three or more times a week, up from 89% in 2010 and 87% in 2008.

Just over a quarter (27%) eat at full-service restaurants once or more per week, though dining out is beginning to rebound gradually. In 2010, 21% ate out one or two times per week; in 2011, 23% do.

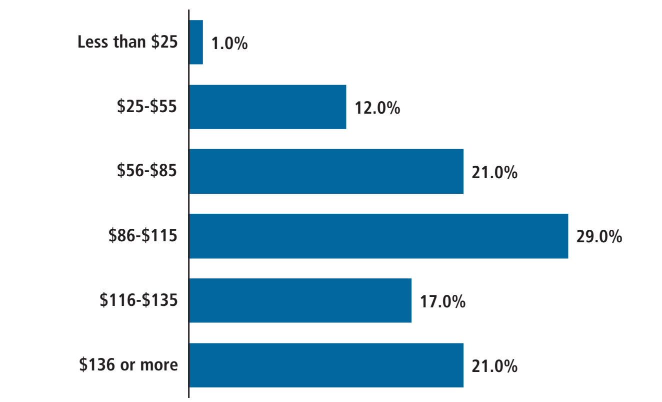
Saving money may be important, but health matters, too. The proportion of consumers who say they never eat fast food rose from 18% in 2009 to 27% in 2011. Another 40% say they eat fast food less than once a month.

Both budget and health concerns are playing into the desire to cook more and better meals at home. More than half of Americans (51%) say they've been cooking at home more often in the past two years, while another 40% have been doing about the same amount of cooking as they did before.

Three quarters of adults (75%) say it's important to them to become better cooks. Of those who have been doing more cooking at home, 63% say it's improved their skills in the kitchen. Nearly seven in 10 adults (69%) are confident in the kitchen; 47% are enthusiastic cooks, and 23% claim to have "the magic touch" (multiple responses allowed).

As noted in the Nielsen study, consumers are making more small shopping trips and fewer large ones. The proportion who shop for groceries twice a week rose from 26%

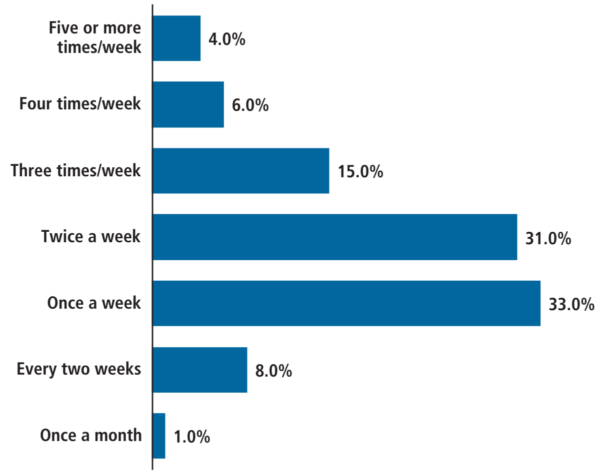
HOW MUCH AMERICANS SPEND ON GROCERIES EACH WEEK, 2011



SOURCE: National Grocers Association in 2009 to 31% in 2011. The number who shopped once a week dropped from 37% in 2009 to 33% in 2011.

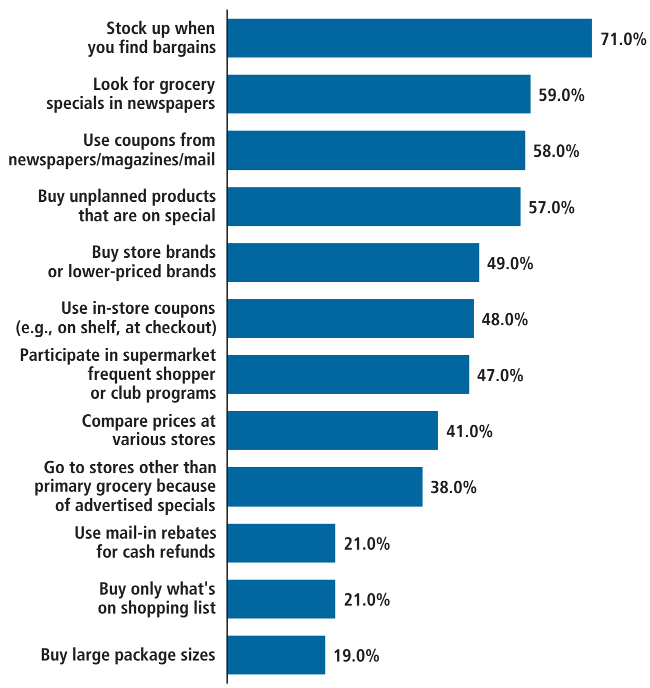
Consumers buy the majority of their groceries at supermarkets/grocery stores, though warehouse clubs and specialty food stores are gaining popularity.

HOW OFTEN AMERICANS SHOP FOR GROCERIES, 2011



SOURCE: National Grocers Association

U.S. CONSUMERS' GROCERY SHOPPING HABITS, 2011



SOURCE: National Grocers Association

SOURCE: "2011 Consumer Survey Report," National Grocers Association, Peter Larkin, President & CEO, 1005 N. Glebe Rd., #250, Arlington, VA 22201; 703-516-0700; info@nationalgrocers.org; www.nationalgrocers.org

Shoppers Want To Buy Healthy Foods, But Their Families' Preferences Are A Barrier

Only a slight majority of Americans (52%) say their food purchases are healthy, according to M Booth & Associates. They say the recession has made a difference in their food purchases, though 64% would pay more for healthy food. They evaluate the healthiness of the food they eat by nutrition labels, with more than 80% saying they pay attention to the nutritional value of the food they buy for their children. Most parents (57%) feel pressured to find ways to give their children affordable, tasty, nutritious meals. Some 42% say their children are eating healthier than they did two years ago.

The researchers identify six types of food shoppers:

Child Pleasers

- 27% of shoppers;
- They trade off nutritional value of meals to appease their children's preferences to avoid a "dinner standoff";
- 48% find it difficult to keep their food purchases healthy; and
- Overt messaging about nutritional value of food does not resonate with them and may even drive them away.

Jugglers

- 18% of shoppers;
- They try to balance cost, nutrition, and their children's preferences, with the decision often coming down to cost; and
- They read nutrition labels but often settle for the food they know will be eaten.

Budget Driven

- 16% of shoppers;
- They do a reasonable job of buying healthy foods despite budget constraints;
- They shop green markets and do more cooking from scratch than any other segment; and
- They are very conscious of the nutritional value of the food they give their children.

Short Cuts

- 14% of shoppers;
- 32% find it hard to keep their food purchases healthy; and
- They opt for "quick and simple" over "natural" or "organic."

Healthy Savvies

- 13% of shoppers;
- They buy local foods and cook from scratch;
- They rely on nutrition labels to make sure they buy the healthiest products; and
- Their children are picky eaters and can make meal time a challenge.

Naturals

- 13% of shoppers;
- They are strong advocates for healthy, wholesome lifestyles;
- They are more likely than average to be vegetarian, have adopted probiotics, and cook from scratch; and
- They are happy to pay a premium for healthy foods despite the economy.

SOURCE: "Better 4 You Survey," M Booth & Associates, Rich Goldblatt, Co-Director, 300 Park Ave. S, 12th Fl., New York, NY 10010; 212-539-3264; richg@mbooth.com; www.mbooth.com. Price: Call for information.

Adults Resist Healthy Food Premium

Although many Americans are trying to eat more healthfully, cost can be a deterrent, according to The NPD Group. The majority of adults (70%) expect prices for healthier restaurant dishes to be the same as for less-healthy items, but 41% of those ages 18-24 expect to pay somewhat more and 15% expect to pay a lot more, while 44% expect prices to be comparable.

Adults age 50 and older are more likely than their younger counterparts to be interested in eating healthful foods, but they're less willing to pay extra for them. Seven in 10 adults age 50 and older (70%) say they're not willing to pay more for healthier menu choices, while 25% say they'd pay somewhat more. Only 5% say they'd pay a lot more.

Diners visiting full-service restaurants are more likely than those at quick-service restaurants to expect the prices for healthful and less healthful choices to be the same.

Consumers of all ages say they'd feel more satisfied with their restaurant experiences if there were more healthful options offered at the same prices as other items, including on value menus.

SOURCE: "Consumers Define Healthy Eating When They Go Out to Eat," The NPD Group, Bonnie Riggs, Restaurant Industry Analyst, 900 West Shore Rd., Port Washington, NY 11050; contactnpd@npd.com; www.npd.com. Price: Contact for information.

Kids Are Key Reasons Families Buy Fresh Fish

Nearly two in 10 families (18%) are purchasing more fresh seafood than they did a year ago primarily because they want their children to eat healthier, according to the Perishables Group. Among families that aren't purchasing fresh seafood, cost (82%) is cited as the top reason; 7% are buying less fresh fish because their children have moved out of the home.

Overall, 58% of families are purchasing less fresh seafood than a year ago, compared to 89% of families who are purchasing less fresh beef, 85% who are buying less fresh chicken, and 71% who are buying less fresh pork.

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SOURCE: Perishables Group, Steve Lutz, EVP, 119 W. Main St., #200, West Dundee, IL 60118; 509-884-2616; steve@perishablesgroup.com; www.perishablesgroup.com.

Families With Tweens, Teens Spend $9,000 Annually On Food

Growing children need a lot of food, according to the U.S. Bureau of Labor Statistics. Families with children 6-17 spend nearly $2,000 a year more on food products than families with children under six. The categories with the largest jump include bakery items ($375 to $561), pork ($161 to $242), and food eaten away from the home ($2,980 to $4,221).

There's relatively little difference in food and beverage spending for families with 6-17-year-olds and those with children over age 18 still living at home ($9,696 vs. $9,393).

ANNUAL SPENDING ON FOOD AND BEVERAGES, BY OLDEST CHILD'S AGE

	UNDER 6	6-17	OVER 18
Cereal, cereal products	$247	$265	$268
Bakery products	$375	$561	$497
Beef	$237	$316	$370
Pork	$161	$242	$248
Other meats	$139	$178	$163
Poultry	$201	$228	$235
Fish, seafood	$136	$174	$187
Fresh milk, cream	$232	$226	$201
Other dairy products	$367	$412	$387
Fresh fruits	$298	$331	$305
Fresh vegetables	$270	$287	$272
Processed fruits	$156	$174	$173
Processed vegetables	$135	$158	$157
Sugar, sweets	$177	$215	$241
Fats, oils	$133	$141	$148
Miscellaneous foods	$1,048	$1,099	$1,053
Nonalcoholic beverages	$416	$468	$530
Food away from home	$2,980	$4,221	$3,958
TOTAL	$7,708	$9,696	$9,393

SOURCE: U.S. Bureau of Labor Statistics

SOURCE: U.S. Bureau of Labor Statistics, 2 Massachusetts Ave. NE, #4675, Washington, DC 20212; 212-691-6339; atusinfo@bls.gov; www.bls.gov/tus.

Shoppers Find Fault With Markets

When shopping for groceries, consumers' pet peeves include a lack of sufficient cashiers on duty (44%) and items being placed too high for them to reach (35%), according to SupermarketGuru.com.

More than a quarter complain about promotional displays impeding the flow of traffic through the aisles (28%) and items being moved around too much so they're hard to locate quickly (27%). Narrow aisles (25%) and insufficient bagging staff (20%) are also problems.

Nearly a third (31%) say these annoyances pop up on most shopping trips, but 59% continue to patronize their local supermarkets because they're convenient to home or work.

Specific issues in the perishables (dairy and produce) and service (meat/seafood, deli, bakery) departments include high prices (38%), inconsistent freshness (34%), items being out of stock (28%), short pull-dates (25%), and insufficient signage above the foods on display (22%).

Shoppers' chief complaints about supermarket sales include stores running out of the items on sale (62%), requiring additional purchases in order to get sale prices or free items (46%), and offering register coupons with short timeframes (32%). Note: Multiple responses were allowed.

Source: "Retailers' Most Annoying Habits," SupermarketGuru.com, Phil Lempert, Editor, 3015 Main St., #320, Santa Monica, CA 90405; 310-392-0448; phil@supermarketguru.com; www.supermarketguru.com. Price: Selected data are available online.

Consumers Are Spending More On Groceries But Getting Less

Although careful spending and bargain-hunting have become virtually universal among American shoppers, there is an increasing divide in shopping behavior and attitudes between consumers with household incomes below $45,000 and those with higher incomes, according to marketing agency Acosta.

Shoppers with household incomes of $45,000 or less are almost twice as likely as those with incomes of $100,000 or more to be cutting down on the number of routine shopping trips they make compared to last year — 29% vs. 17%.

Two in 10 shoppers say they're spending less because of job losses; nearly a quarter of those with incomes under $45,000 (23%) have lost jobs, been demoted, or have experienced some other type of negative job outcome in the past year.

Consumers in all income brackets except $100,000+ are more likely to say their household incomes have changed for the worse than for the better in the past year.

Despite careful shopping, most consumers are spending more each month on groceries in 2011 than they did in 2010 — but they're getting less for their money.

Shoppers Come Prepared

Almost three quarters of Americans (74%) bring written shopping lists with them when they go grocery shopping. A third (33%) use websites or apps to help them plan their routine shopping trips.

Among those who use apps or websites, 52% find grocery store websites most helpful for planning their shopping trips, while 48% rely on coupon sites, 29% use consumer packaged goods sites, and 24% use cooking websites.

More than eight in 10 shoppers (85%) use traditional grocery store circulars in their shopping.

More than half of consumers (56%) have used more grocery coupons in the past six months than they typically did before that time, according to automated retail company Coinstar. Consumers are trying to shop within their means; 42% pay for groceries with debit cards, and 27% with cash.

Eight in 10 (81%) say they've spent as much on groceries in the past three months as they did in the previous three months.

Nearly half of consumers are trying to save money by purchasing more store brand items (48%), and 42% are buying fewer "discretionary" items at grocery stores, such as magazines or candy.

Consumers want to see immediate, tangible value for their participation in loyalty programs; 57% say they're most encouraged to use loyalty or value cards when instant rewards are credited to a current purchase. More than half of shoppers (56%) have used supermarket loyalty or value cards for purchases in the past six months.

SOURCES: "The Why Behind The Buy," Fall 2011, Acosta Sales & Marketing, Colin Stewart, SVP Acosta Insights, 6600 Corporate Center Pkwy., Jacksonville, FL 32216; 904-470-4213; cstewart@acosta.com; www.acosta.com. Price: Available online at no charge.

"Coinstar Grocery Snapshot Survey," Coinstar, Engle Saez, VP Category Management and Consumer Experience, 1800 114th Ave., SE, Bellevue, WA 98004; 425-943-8000; info@coinstar.com; www.coinstar.com. Price: Contact for information.

Majority of Consumers Prefer Organic Foods

Almost six in 10 U.S. adults (58%) say that given a choice, they prefer to eat organic foods, according to Thomson Reuters and NPR. Interest in organic foods decreases with age; 63% of adults younger than 35 prefer organics, as do 61% of those ages 35-64, but only 45% of adults ages 65 and older prefer them.

While cost is a factor, education has a greater impact than income on consumers' preference for organic foods. Almost two thirds (64%) of adults with college degrees or more education prefer organics, compared to 53% of those with a high school education or less.

Among those who prefer organic foods, the top motivations are a desire to support local farmers (36%) and being concerned about toxins in conventionally grown/produced foods (34%). College-educated adults are more likely than those with less education to be motivated by concern about toxins (43%).

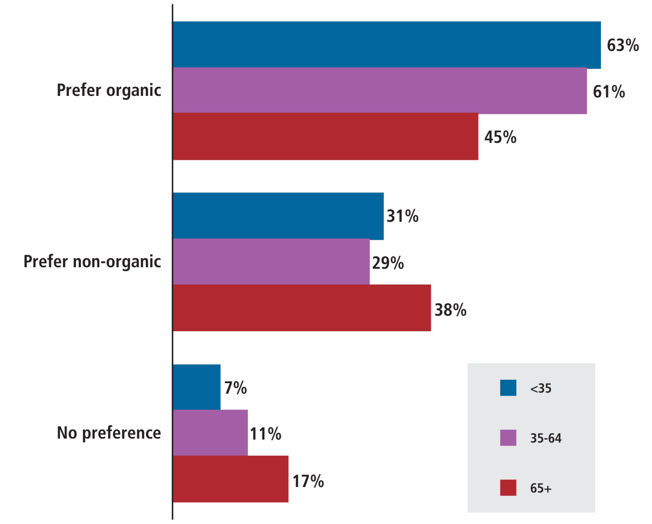
Adults with household incomes of $25,000 to $49,999 are more likely than those with higher or lower incomes to be motivated by wanting to support local farmers (40%). Adults in this income bracket are also most likely to prefer buying produce at farmers' markets (49%, compared to 43% of adults overall).

Those who prefer conventionally produced foods are most likely to do so because they perceive organic foods as being more expensive (54%) and less readily available than non-organic foods (21%).

Adults under 35 (36%) and those ages 35-64 (35%) are more likely than those ages 65+ (30%) to say the availability of organic options influences their food choices in restaurants. Adults with lower household incomes (41% of those with incomes of less than $25,000) are more likely than those with higher incomes (29% of those with incomes of $100,000 or more) to say their choices of restaurant meals would be influenced by having organic options on the menu.

SOURCE: "Thomson Reuters-NPR Health Poll: Organic Food," June 2011, Calvin Mitchell, SVP Corporate Affairs, 3 Times Sq., New York, NY 10036; 212-223-4000; calvin.Mitchell@thomsonreuters.com; www.thomsonreuters.com. Available for download at: http://healthcare.thomsonreuters.com/npr

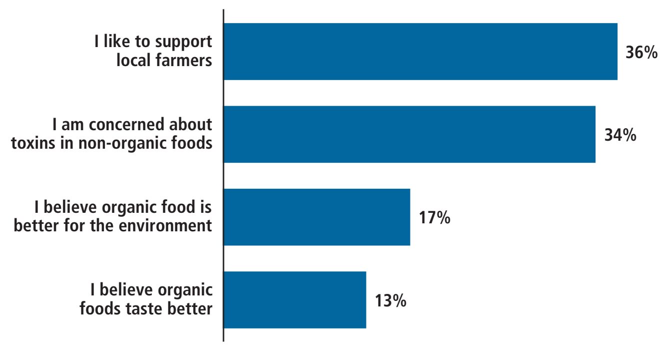
CONSUMER PREFERENCES FOR ORGANIC VS. NON-ORGANIC FOODS, BY AGE



SOURCE: Thomson Reuters/NPR

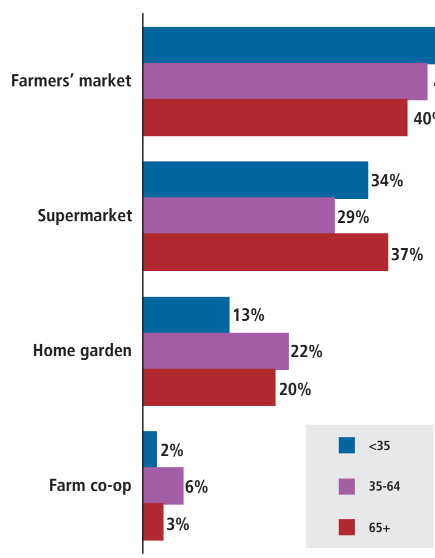
WHY AMERICANS PREFER ORGANIC FOODS

(Among those who do)



SOURCE: Thomson Reuters/NPR

WHERE CONSUMERS PREFER TO GET FRESH PRODUCE, BY AGE



SOURCE: Thomson Reuters/NPR

Organic Foods Market Is Growing

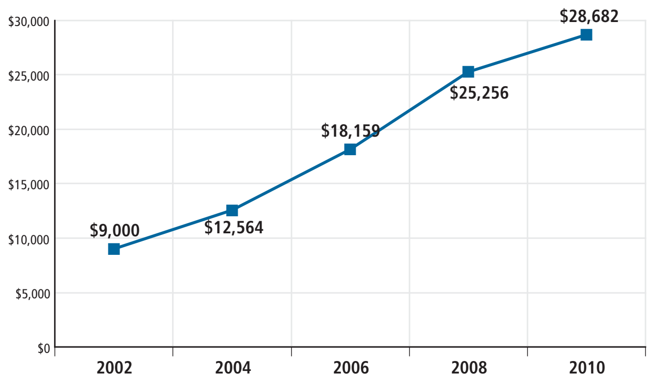
U.S. consumers spent $28.6 billion on organic foods and other products in 2010, according to the Organic Trade Association. Sales of organic foods grew 8% between 2009 and 2010, up from 5% between 2008 and 2009. Although food makes up 93% of the market for organic products, sales of non-food items are growing faster — 10% between 2009 and 2010.

Sales of organic food comprise only 4% of overall food sales, but where organics are growing, non-organic food sales have stayed flat. Sales of organic fruits and vegetables grew 12% to $10.6 billion in 2010, accounting for 40% of all organic food sales.

Organics make up 12% of total U.S. fruit and vegetable sales. Organic dairy products grew 9% to $3.9 billion in sales in 2010, making up 6% of the total U.S. dairy market.

The top-selling categories in non-food organic products are nutritional supplements (which grew 7% to $681 million in 2010), fiber for linens and clothing (up 16% to $605 million), and personal care products (up 7% to $490 million).

GROWTH OF ORGANIC PRODUCTS, 2002-2010
(Consumer sales in $ millions)



SOURCE: Organic Trade Association

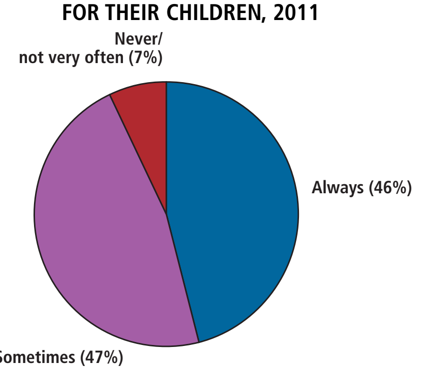
SOURCE: "2011 Organic Industry Survey," Organic Trade Association, Barbara Haumann, Senior Writer/Editor, 28 Vernon St., #413, Brattleboro, VT 05301; 802-275-3820; bhaumann@ota.com; www.ota.com. Price: $795 for OTA members; $1,495 for non-members.

Parents Making More Of An Effort To Buy Healthy Food Products For Their Kids

Almost half of parents (46%) "always" make healthy or nutritious food purchases when buying for their children. That's up 11 points since 2009 to 46%, according to the Food Marketing Institute and *Prevention* magazine. Nevertheless, a similar percentage of parents claim to never make these purchases.

Dinners are the most consistently healthy meals, with 65% of parents ensuring their kids eat nutritious meals, followed by breakfast (59%), and lunch and snacks (47% each).

FREQUENCY WITH WHICH PARENTS PURCHASE HEALTHY FOODS FOR THEIR CHILDREN, 2011



SOURCES: Food Marketing Institute, *Prevention* magazine

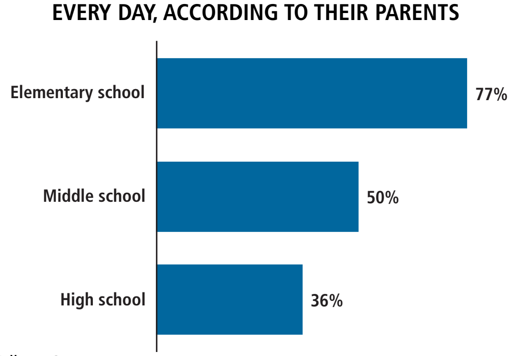
SOURCES: Food Marketing Institute, Leslie Sarasin, President/CEO, 2345 Crystal Dr., #800, Arlington, VA 22202; 202-452-8444; fmi@fmi.org; www.fmi.org.

Prevention magazine, Rodale, Laura Petasnick, Publisher, 733 Third Ave., 7th Fl., New York, NY 10017; 212-808-1632; laura.petasnick@rodale.com; www.prevention.com.

Moms Want Kids To Eat Breakfast Every Day But Many Don't

Nine in 10 moms (89%) want their children to eat breakfast every day, but only 60% say their kids do, according to Kellogg. More than half of adults (54%) say they'd like to eat breakfast every day; 34% do.

U.S. SCHOOL-AGE CHILDREN WHO EAT BREAKFAST EVERY DAY, ACCORDING TO THEIR PARENTS



SOURCE: Kellogg Company

Moms are almost twice as likely as dads (82% vs. 42%) to claim that they're the primary grocery shoppers in their households. Four in 10 moms (42%) use coupons when shopping for breakfast items, compared to 30% of dads.

Moms are more likely than dads to consider fiber content very important when choosing breakfast cereals (55% vs. 44%), though their top consideration is taste (59% of moms and 55% of dads). Moms are also more likely than dads to look for cereals with low sugar content (55% vs. 44%).

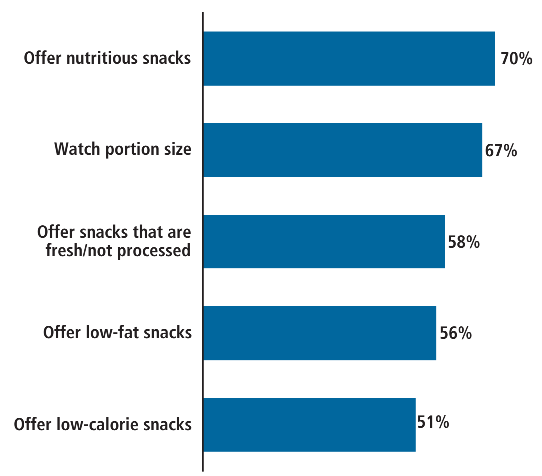
SOURCE: Kellogg Company, Doug VanDeVelde, SVP Morning Foods Marketing and Innovation, One Kellogg Sq., PO Box 3599, Battle Creek, MI 49016; 269-961-3799; www.kelloggcompany.com. Price: This study is proprietary.

Parents Teach Kids Healthy Eating Habits Through Nutrients, Portion Control

One in three parents (35%) view snacks as an opportunity to teach their children about healthy eating, according to SymphonyIRI Group. Their preferred strategies include offering nutritious snacks (70%), watching portion size (67%), and offering snacks that are fresh and not processed (58%).

More than seven in 10 parents (71%) look for snacks that are inexpensive, and 43% will compromise on nutritional value to save money. Three in 10 families (30%) are trying to make household snacks last longer.

HOW PARENTS TEACH THEIR CHILDREN TO EAT HEALTHY SNACKS



SOURCE: SymphonyIRI Group

SOURCE: SymphonyIRI Group, Sally Lyons Wyatt, 250 E. Fifth St., #700, Cincinnati, OH 45202; 513-651-0500; sally.lyonswyatt@symphonyiri.com; www.symphonyiri.com.

My Kid Eats More Fruit Than Yours, Say Parents

Nearly half of parents with children under age 18 (48%) feel their kids eat more fruit than other children, while 35% think their children consume equal amounts as their peers, according to grocer Meijer. Some 13% feel their kids eat less fruit than other children.

Parents are less confident that their children consume larger amounts of vegetables than other kids. More than one in three (36%) say their kids eat more vegetables than other children, while 40% feel they eat about the same amount as other children, and 20% say their children eat fewer vegetables than others in their age group.

SOURCE: Meijer, Frank Guglielmi, 2929 Walker Ave., Grand Rapids, MI 49544; 734-844-2781; frank.guglielmi@meijer.com; www.meijer.com.

Black Teens See More Soft Drink Ads Than White Teens Do

Black teens viewed 80% to 90% more TV ads for sugary and energy drinks (including soda, fruit drinks, and other sweetened soft drinks) than their White peers did in 2010, according to the Yale University Rudd Center for Food Policy & Obesity.

Black teens saw three times as many ads for Sprite as White teens, and four out of six Sprite ads had Black main characters. Similarly, Black teens viewed more than twice as many ads for Vitamin Water, Mountain Dew, and 5-Hour Energy as White teens did. Black teens are also more likely than their White peers to visit soft drink brand websites; 16 out of 43 websites were visited at least 25% more often by Black teens than by White teens.

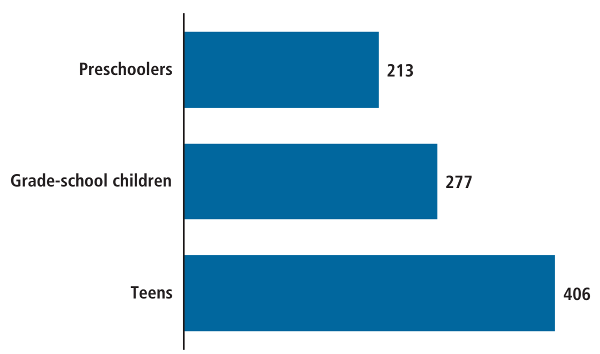
Although the majority of sugared beverage brands don't advertise extensively on Spanish-language TV or radio, Hispanic teens heard six times as many Mountain Dew ads and three times as many SoBe Lifewater and Amp Spanish-language radio ads as adults did in 2010.

Hispanic preschool-age children saw more Spanish-language TV ads for Coca-Cola Classic and Powerade than non-Hispanic children their age. Preschoolers also saw more Spanish-language TV ads for sweetened beverages than older children or teens.

Hispanic children saw 49% more ads and Hispanic teens saw 99% more ads for sweetened drinks on Spanish-language TV in 2010 than they did in 2008. Ads for water, diet drinks, 100% fruit juice, and other beverages without added sugar accounted for 40% of beverage ads seen by adults and 28% of beverage ads seen by children and teens.

SOURCE: "Evaluating Sugary Drink Nutrition Marketing to Youth," Rudd Center for Food Policy & Obesity, Marlene Schwartz, Ph.D., Deputy Director, Yale University, PO Box 208520, New Haven, CT 06520; 203-432-0662; marlene.schwartz@yale.edu; www.yaleruddcenter.org. Price: Available online at no charge at www.sugarydrinkfacts.org

AVERAGE NUMBER OF TV ADS FOR SUGARED AND ENERGY DRINKS SEEN BY CHILDREN IN 2010, BY AGE



SOURCE: Yale Rudd Center for Food Policy and Obesity

Teens Who Drink Sports Beverages Lead Healthier Lifestyles Than Teen Soda Drinkers

Teens who are active in sports and physical activities are more likely than their less active peers to eat more fruits and vegetables and are less likely to drink regular soda, according to research published in the journal *Pediatrics*.

Teens who drink soda and sports drinks are less active, watch more TV, play more videogames, and engage in less nutritious eating habits.

Six in 10 teen boys (60%) and 50% of teen girls drink at least one soda, sports drink, or sugary beverage (iced-T, fruit punch) each day. Boys tend to increase their daily soda consumption from 8th to 11th grade, whereas girl soda consumption remains constant. This reverses among teens from lower socio-economic households, where girls tend to drink more soda as they age, whereas boys remain consistent.

Black teens drink fewer sodas and more sports drinks than Hispanic or White teens.

SOURCE: "Dietary and Activity Correlates of Sugar-Sweetened Beverage Consumption Among Adolescents," *Pediatrics*, October 2010, www.pediatrics.org

Snack Choices Become Less Healthy As Children Age

The younger the child, the more likely he or she is to eat a healthy snack, according to the NPD Group.

The top three snacks eaten by children ages 2-5 are fresh fruit, refrigerated yogurt, and fruit cups or applesauce. Less-healthy options, such as gum and potato chips, begin to infiltrate kids' snacking choices during ages 6-12. By the time kids reach 13-17, fresh fruit is the only healty snack remaining in their top five choices.

TOP SNACKS AMONG 2-17-YEAR-OLDS, BY AGE GROUP

AGE 2-5	AGE 6-12	AGE 13-17
1. Fresh fruit	1. Fresh fruit	1. Gum
2. Yogurt	2. Gum	2. Fresh fruit
3. Fruit cup/applesauce	3. Potato chips	3. Potato chips
4. Chocolate/candy bars	4. Yogurt	4. Chocolate/candy bars
5. String/prepackaged cheese	5. Chocolate/candy bars	5. Ice cream

SOURCE: NPD Group

SOURCE: NPD Group, Anita Frazier, Entertainment IndustryAnalyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita_frazier@npd.com; www.npd.com.

Collegians Crave Global, Exotic Fare

College students are asking for Mediterranean food, customized meals, and gluten-free options in 2011, 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.

There's also a shift towards integrating technology into food orders. Sodexo is testing apps that allow students to check out the menu, order, pay remotely and pick up their meals in person.

Food preferences vary by region, according to the company. Students attending school in the South Central U.S. enjoy vegan fare and pita with hummus. Students in the Midwest favor Thai, Asian, and Latino fusion as well as fresh avocado. The Northwest tends to enjoy local seafood and fresh fruit. Vietnamese and Spanish-style tapas are preferred by students in the Mid-Atlantic region, while those in the Southeast like local, sustainable seafood and produce, and Southwest students favor homemade California rolls and custom Asian cuisine.

FOODS INCREASINGLY SOUGHT BY COLLEGE STUDENTS, 2011

1. Grilled chicken souvlaki kabob
2. Paella
3. Spanakopita
4. Cous cous chicken stew
5. Orecchiette with broccoli and garbanzo beans
6. Fattoush and sumac (pita bread salad with tangy dressing)
7. Spanish tomato bread with manchego cheese
8. Edamame and corn salad
9. Pesto pasta bowl
10. Wild mushroom risotto balls with pesto aioli

SOURCE: Sodexo

SOURCE: Sodexo, Monica Zimmer, 9801 Washingtonian Blvd., Gaithersburg, MD 20878; 301-987-4461; monica.zimmer@sodexo.com; www.sodexousa.com.

College Students Seek Healthier On-Campus Meals At Places That Stay Open Later

More than four in 10 college students (44%) say their school's dining program is "somewhat" important in deciding where to enroll, according to Technomic.

While two in three students (62%) eat at on-campus dining facilities at least weekly, only 34% are satisfied with their options. One of their biggest gripes is the lack of healthy offerings. Only 28% are satisfied their school provides enough healthy menu choices. Among other findings:

- 21% are limiting their meat consumption.
- 47% say food customization is very important so they can omit or substitute ingredients, up from 43% of students who felt this way in 2009.
- 48% "strongly agree" that they want on-campus dining facilities to stay open later at night.

SOURCE: "College and University Consumer Trend Report," Technomic, Sara Monnette, Director Consumer Research, 300 S. Riverside Plz., Chicago, IL 60606; 312-506-3848; smonnette@technomic.com; www.technomic.com.

College Students Are Not Eating Fruits, Veggies

Male college students eat about five servings of fruits and vegetables a week; female college students consume four servings a week, according to research published in the *Journal of Nutrition Education and Behavior*. The USDA recommends five daily servings.

Both male and female college students skip meals frequently, though overall, females had better eating habits, including reading food labels and eating in the college dining halls more frequently than their male counterparts. Male students also consume more fat in their diets.

SOURCE: *Journal of Nutrition Education and Behavior,* Brad Cardinal, Study author, Oregon State University, College of Public Health and Human Sciences, 220 Langton Hall, Corvallis, OR 97331; 541-737-2506; brad.cardinal@oregonstate.edu; www.jneb.org.

factoids

- U.S. consumers spent $10.7 billion on **juices** and juice drinks between June 2010 and June 2011. *(Nielsen; phone: 646-654-5000)*
- Nine in 10 men ages 18-35 (90%) have **eaten at McDonald's** in the past three months. *(Lab42 Market Research; phone: 312-685-1242)*
- Almost eight in 10 consumers who are trying to avoid **eating sugar** (79%) are doing so because they think it's better for their overall health. *(The Hartman Group; phone: 425-452-0818)*
- Four in 10 refrigerated **hot dogs** sold annually (40%) are purchased between Memorial Day and Labor Day. *(Nielsen; phone: 646-654-5000)*
- Sales of **organic hot dogs** grew 29% between June 2010 and June 2011. *(Nielsen; phone: 646-654-5000)*
- Americans eat more than 150 million **hot dogs** on Independence Day. *(National Hot Dog and Sausage Council; phone: 202-587-4200)*
- Two thirds of Americans (66%) claimed to practice **healthy eating habits** in May 2011, roughly even with the 68% who said so in May 2010. *(Gallup; phone: 202-715-3030)*
- More than half of Americans (52%) say they're likely to choose a **restaurant** based on how much it supports the local community and/or charitable activities. *(National Restaurant Association; phone: 202-331-5900)*
- Almost a quarter of those who eat **ethnic foods** (23%) say they first tried them after reading cookbooks with dishes from other countries. *(Mintel; phone: 312-932-0400)*
- Men spend an average of eight minutes researching their **beer** choices before buying. (Men's Health*; phone: 212-808-1429)*
- The majority of **tea** (80%) consumed in the U.S. is iced. *(World Tea Expo; phone: 702-253-1893)*
- Tea is the second most heavily consumed **beverage** in the world (water is first). *(U.S. Department of Agriculture, Agricultural Research Service; phone: 301-504-6078)*

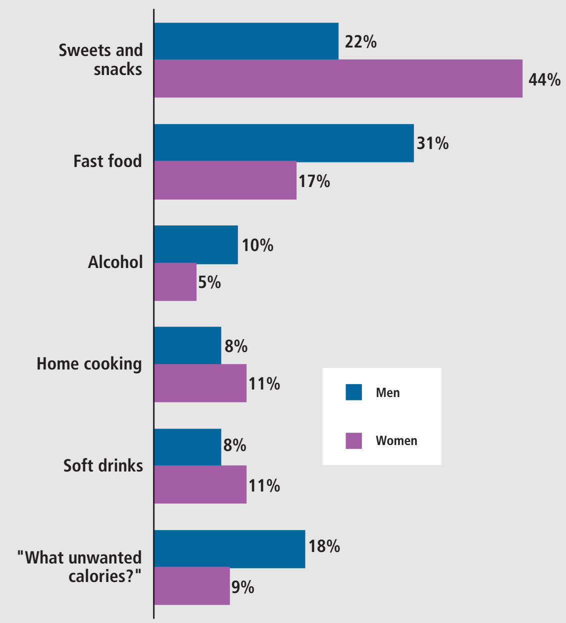
FAST FACTS: Seafood

- U.S. residents consumed (or otherwise utilized) 63.6 pounds of **seafood** per capita in 2010. *(National Marine Fisheries Service; phone: 301-427-8300)*
- U.S. consumers spent $50.3 billion on **seafood** eaten at restaurants, carry-out, or from caterers in 2009. *(National Marine Fisheries Service; phone: 301-713-2370)*
- Eighty-four percent of **seafood** eaten in the U.S. is imported. *(National Marine Fisheries Service; phone: 301-713-2370)*

FAST FACTS: Diet

- More than half of U.S. adults (54%) think they're doing all they can to eat a **nutritionally balanced diet**, but 76% aren't eating enough fruits and vegetables. *(HealthiNation; phone: 646-556-6768)*
- More than two thirds of U.S. adults (68%) are **overweight** or obese. *(National Center for Health Statistics; phone: 301-458-4000)*
- Fewer than one third of U.S. adults (32%) have been advised by their **doctors** to lose weight. *(Harris Interactive; phone: 301-458-4000)*
- Americans who live in West Virginia are most likely to be **obese** (34%); those in Colorado are least likely (20%). *(Gallup; phone: 202-715-3030)*

WHERE MEN AND WOMEN GET MOST OF THEIR UNWANTED CALORIES



SOURCE: *60 Minutes/Vanity Fair* Poll. Vanity Fair, Mary Connelly, Associate Publisher, 4 Times Sq., 7th Fl., New York, NY; 212-286-8180; www.vanityfair.com.

WHY AMERICANS BUY MEALS FROM FOOD TRUCKS

It was at/near an event I was attending	28%
It delivers to my place of business	25%
I happened to walk by	24%
I specifically make trips to it	14%
I was influenced by someone else	3%

SOURCE: "Food Truck Innovation Report," Technomic, Patrick Noone, VP, 300 S. Riverside Plaza, #1200, Chicago, IL 60606; 312-506-3852; pnoone@technomic.com; www.technomic.com

➤ Four in 10 Americans trying to cut down on their soda intake (41%) think **fruit juice** is the best replacement. *(Nestlé Waters North America; phone: 203-531-4100)*

➤ More than three quarters of **salt** (77%) in the typical American diet comes from processed food. *(U.S. Department of Health and Human Services; phone: 703-305-7600)*

➤ There are 960,000 **restaurants** in the U.S. *(National Restaurant Association; phone: 202-331-5900)*

➤ Three quarters of Americans say they try to eat **seasonal foods** (29% strongly agree and 48% agree somewhat). *(The Hartman Group; phone: 425-452-0818)*

➤ Sales of **cow's milk** declined 4% between June 2010 and June 2011. *(Nielsen; phone: 646-654-5000)*

➤ Four in 10 Americans are "**flexitarians**" — meat eaters who consciously choose to avoid meat some days for health or economic reasons. *(The Hartman Group; phone: 425-452-0818)*

➤ Nearly half of Americans (48%) eat a **hamburger** at least once a week, up from 38% in 2009. *(Technomic; phone: 312-506-3852)*

➤ It would take approximately 3,168,000,000 **Cheerios** laid end to end to circle the earth at the equator. *(General Mills; phone: 763-764-7600)*

➤ Americans consumed 398 million pounds of **canned tuna** in 2009. *(National Marine Fisheries Service; phone: 202-482-3436)*

➤ The average supermarket **apple** is 14 months old. *(Martin Lindstrom Company; phone: 213-814-2730)*

➤ Americans consumed 26.4 billion pounds of **beef** in 2010. *(U.S. Department of Agriculture; phone: 202-694-5183)*

➤ Nearly a third of Americans (32%) prefer their **hamburgers** to weigh seven ounces or more. *(Agricultural Marketing Resource Center; phone: 866-277-5567)*

➤ Almost half (49%) of Americans' total food budget is spent on **restaurants**, up from 25% in 1955. *(National Restaurant Association; phone: 202-331-5900)*

➤ Seven in 10 Americans are deficient in **vitamin D**. *(Milk Processor Education Program; phone: 202-737-0153)*

➤ Only half of men (50%) eat the recommended servings of **fruit and vegetables** four or more days a week. *(Gallup; phone: 202-715-3030)*

➤ "Being too big" and "inconvenient" are the primary reasons consumers don't purchase **watermelons**. *(National Watermelon Promotion Board; phone: 407-657-0261)*

➤

SHOPPERS SAY LOCALLY-SOURCED PRODUCTS ARE DEFINED AS PRODUCTS GROWN:

In my state	44%
Within a certain radius of home/grocery store	41%
On a small (family-owned and operated) farm	13%
Some other definition	2%

SOURCE: Food Marketing Institute

FAST FACTS: Coffee

➤ Almost one in five **iced coffee** drinkers (18%) say their favorite thing about the beverage is being able to drink coffee through a straw. *(Dunkin' Donuts; phone: 781-737-5200)*

➤ More than eight in 10 **coffee drinkers** (86%) drink it at home on a typical day. *(National Coffee Association; phone: 212-766-4007)*

➤ American consumers ordered 500 million **iced coffee** drinks in restaurants in 2010. *(The NPD Group; phone: 516-625-0700)*

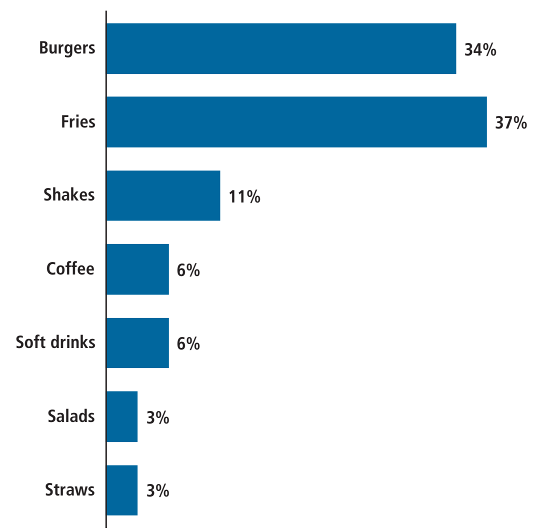
➤ More than half of **iced coffee** drinkers (56%) like it better than hot coffee, even during winter. *(Dunkin' Brands; phone: 781-737-5200)*

➤ Almost two thirds (64%) of people looking for an energy boost drink **iced coffee**; 22% drink energy drinks. *(Dunkin Donuts; phone: 781-737-5200)*

➤ Four in 10 U.S. adults ages 18-24 (40%) and 54% of those ages 25-39 drink **coffee** every day. *(National Coffee Association of U.S.A.; phone: 212-766-4007)*

➤

FAVORITE ITEMS AT MCDONALD'S AMONG MEN AGES 18-35



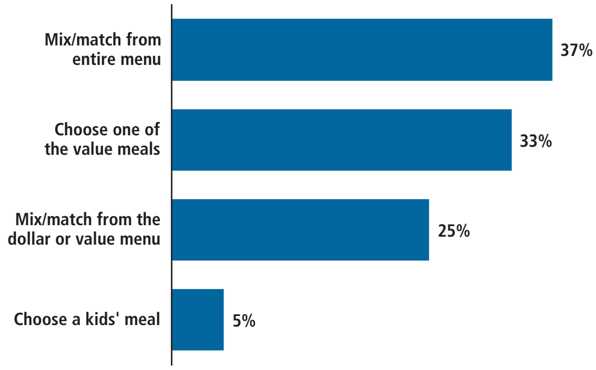
SOURCE: Lab42 Market Research, Laura Rokita, VP, 213 N. Racine Ave., Chicago, IL 60607; 312-685-1242; info@Lab42; www.lab42.com

➤ Pasta entrees make up one of every four prepared entree dishes on **restaurant menus**. *(MenuMine; 708-386-7579)* Z

➤ Nearly half of adults (47%) would buy meals from a **food truck** near their home or office if it offered food from a favorite restaurant. *(National Restaurant Association; phone: 202-331-5900)*

➤ Six in 10 moms (62%) avoid beverages containing **sugar** when shopping for their children. *(Hartman Group; phone: 425-452-0818)*

➤ **WHAT MEN AGES 18-35 EAT AT FAST FOOD RESTAURANTS**



SOURCE: Lab 42 Market Research, Laura Rokita, VP, 213 N. Racine Ave., Chicago, IL 60607; 312-685-1242; info@lab42.com; www.lab42.com.

➤ Americans eat an average of 3,754 **calories** per day. The recommended daily intake is 2,500-2,800 for adult men and 2,000 for adult women. *(The Hartman Group; phone: 425-452-0818)*

➤ Americans bought $2.6 billion in **gluten-free foods** in 2010. *(Packaged Facts; phone: 240-747-3015)*

➤ A quarter of people who like **ethnic foods** (25%) were introduced to their favorites because they live in diverse neighborhoods; 18% first tried them while traveling abroad. *(Mintel; phone: 312-628-7946)*

➤ Nearly six in 10 adults (57%) say they're more likely to patronize restaurants that offer food produced via **organic** or other environmentally friendly methods. *(National Restaurant Association; phone: 202-331-5900)*

➤ Sales of **private-label foods** are expected to grow from 25% of the global grocery market to 50% by 2025. *(Rabobank, Food and Agribusiness Research; phone: 011-31-30216-2758)*

➤ Americans spent more than $3.2 billion on **potato chips** ($10 per capita) between February 2010 and February 2011. *(Nielsen; phone: 646-654-5000)*

➤ The average American will **consume** 20,000 potatoes over the course of a lifetime. *(National Geographic; phone: 202-857-7027)*

➤ Grocery shoppers who are buying **potatoes** spend an average of 47 minutes in the store, compared to 37 minutes spent by shoppers not buying potatoes. *(U.S. Potato Board; phone: 303-369-7783)*

➤ Households that include children spend an average of $138.90 on **groceries** per week; households without children spend $82.80. *(Food Marketing Institute; phone: 202-452-8444)*

➤ U.S. adults spend an average of 75 minutes per day **eating** and/or drinking; French adults spend more than two hours. *(Organization for Economic Cooperation and Development; phone: 202-785-6323)*

➤ Almost half of (49%) of adults worldwide are trying to lose **weight**. *(Datamonitor; phone: 212-686-7400)*

➤ Two thirds of grocery shoppers check nutrition labels when buying **processed meats**: 29% check every time, and 37% check sometimes. *(American Meat Institute; phone: 202-587-4200)*

➤ Eight in 10 Americans (80%) think they're eating enough **fiber**; one in 10 actually do. Twenty percent think meat provides fiber, and 10% think water does. *(Kellogg; phone: 269-961-2000)*

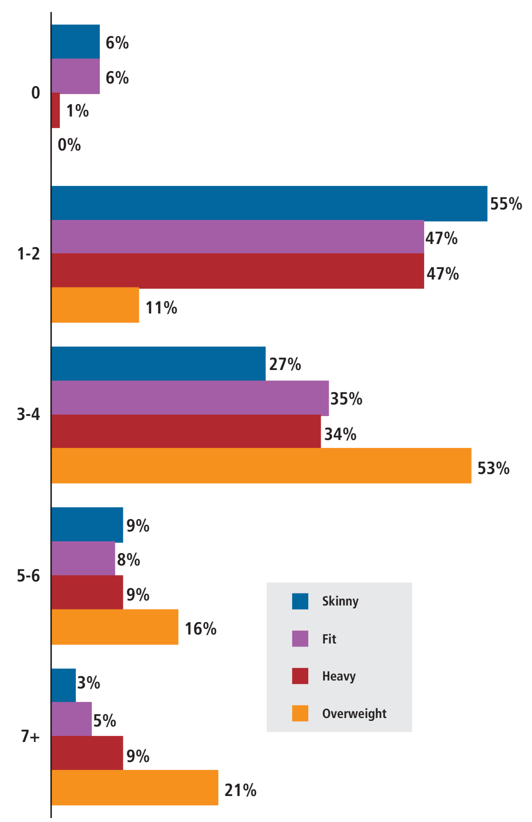
➤ A majority of Americans (57%) **dined out** at a casual restaurant in the prior year, spending an average of $13.60 per meal per person. *(Alix Partners; phone: 248-204-8689)*

➤ Two thirds of cooks (66%) baked at least one **pie** during the 2010 Christmas and Hanukkah holidays, and those aged 25-34 plan to bake an average of three pies in 2011. *(Crisco; phone: 800-766-7309)*

➤ The vast majority of parents (82%) and kids (72%) feel closer to their families when they have dinner together, though 47% say busy schedules are a barrier to having **family dinners**. *(Wasa/Barilla; phone: 847-405-7500)*

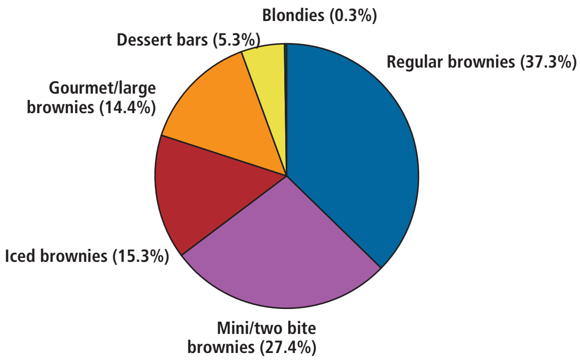
➤ Nearly a third of U.S. women (32%) have eaten/cooked with food that was significantly past its **sell-by date**. (Better Homes and Gardens*; phone: 212-551-7189)*

➤ **HOW MANY TIMES MEN AGES 18-35 HAVE EATEN FAST FOOD IN THE PAST THREE MONTHS, BY SELF-DESCRIBED BODY TYPE**



SOURCE: Lab 42, 213 N. Racine Ave., Chicago, IL 60607; 312-685-1242; info@lab42.com; www.lab42.com

➤ **U.S. BROWNIE/DESSERT BAR SALES, 2011**



SOURCE: Perishables Group

➤ Almost four in 10 men ages 18-35 (38%) have six or more packets of **hot sauce** from Taco Bell at home. *(Lab 42; phone: 312-685-1242)*

➤ Americans spent $5.2 billion on **frozen pizza snacks** between March 2010 and March 2011. *(Nielsen; phone: 646-654-5000)*

➤ The best-selling **ice cream** flavor at Ben & Jerry's Scoop Shops is vanilla. *(Ben & Jerry's; phone: 802-846-1500)*

➤ Twelve percent of women crave pickles when they're **pregnant**. *(*Women's Health *magazine; phone: 212-697-2040)*

health

Some 16% of Americans lack health insurance, but among some populations — Hispanics, Blacks, and low-income households — the proportion is much higher. The majority of adults with health insurance get it through their employers.

Searching for health information is the third most common online activity, and most Internet users say they'd be open to using a secure website to communicate with their doctors and pay medical bills. Among Generation Y, the majority would switch doctors to obtain this service.

Children's physical activity levels decline during their preteen years; kids say they'd be more active if their neighborhoods included more safe places to play; if their schools offered more fun activities before, during, and after class; and if more of their friends wanted to join in.

The pressure to look good, if not healthy, begins early; more than 200,000 teens had cosmetic surgery in 2010, and another 13,000 had Botox. A substantial number of children and teens take prescription medications on a regular basis, as well.

Often overlooked in discussions of health but central to overall well-being is the topic of sleep. Among Americans 13 and older, teens get the most sleep and Gen Xers the least, yet teens and 20-somethings are more likely than Gen Xers or Boomers to complain about lack of sleep.

Health Is One Of Top Online Searches

Eight out of 10 online adults (80%) use the Internet to find health information, according to the Pew Research Center. Looking for health-related content is the third most-common online activity, after emailing and using search engines.

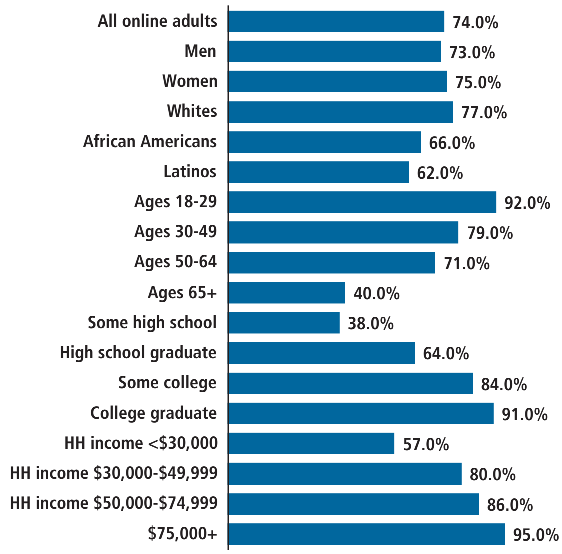
Women are more likely than men to look for all types of health information online. Not surprisingly, adults who are caregivers for loved ones are more likely than non-caregivers to look for health information online. Nearly half (48%) of Internet users who look online for health information say their most recent health-related searches were on behalf of other people.

Caregivers (53%) and parents with children at home (56%) are even more likely to have looked for health information for someone else in their last search.

The higher a person's education level, the more likely he/she is to seek health information online.

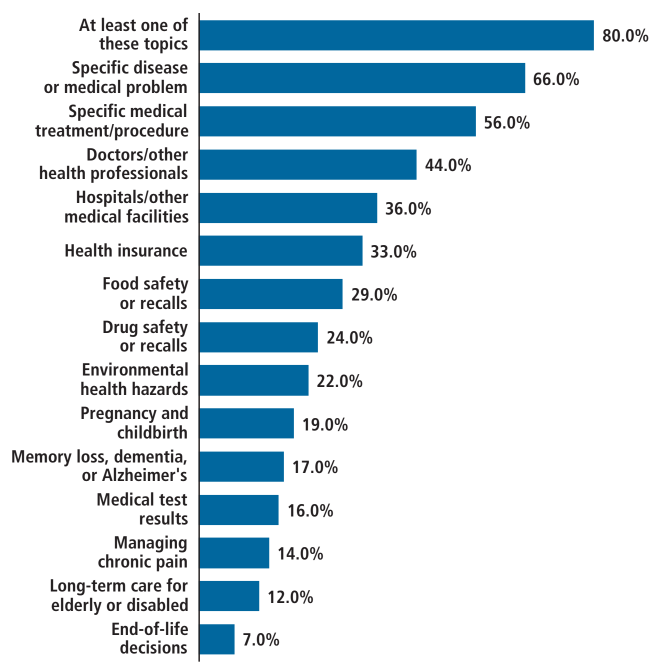
SOURCE: "Health Topics, February 2011," Pew Research Center, Internet and American Life Project, Susannah Fox, Associate Director, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; sfox@pewinternet.org; www.pewinternet.org. Price: This study is available as a free download: http://www.pewinternet.org/reports/2011/healthtopics.aspx

ONLINE ADULTS WHO LOOK FOR HEALTH INFORMATION ON THE INTERNET, 2011



SOURCE: Pew Research Center

HEALTH TOPICS INTERNET USERS RESEARCH ONLINE



SOURCE: Pew Research Center

Online Access To Doctors Is Popular

U.S. adults are very open to the idea of using the Internet to communicate with healthcare providers, finds Intuit Health. Nearly three quarters (73%) say they'd use a secure online communication portal to schedule medical appointments, pay bills, and/or get lab results.

Two in 10 say it's not easy to reach their doctors' offices to ask questions, make appointments, or get lab results. Half would switch doctors in order to get the convenience of online communication with their doctors. Gen Y (59%) adults are more likely than Boomers (29%) to say they'd switch.

The majority of adults are comfortable with online sharing of their health information; 78% would use a secure online method to access their medical histories and share information with their doctors. More than eight in 10 (81%) would take advantage of the opportunity to schedule their own appointments and fill out medical/patient registration forms online.

Rising costs of healthcare are a major area of concern; 62% say their healthcare costs increased in 2010, and 66% expect costs to increase in the future. Seven in 10 are somewhat or very concerned about managing their healthcare bills.

More than four in 10 patients (45%) wait more than a month before paying medical bills. Women are more likely than men to delay payment. More than half of adults (57%) have had at least one medical bill go to a collection agency. Four in 10 (41%) aren't confident that their medical bills are accurate.

SOURCE: "Health Care Check-Up Survey," Intuit Health, Steve Malik, President & GM, Intuit Health Group, 2632 Marine Way, Mountain View, CA 94043; 650-944-6000; www.intuithealth.com

Allergies Are On The Rise In The U.S.

One in five Americans have allergies, according to Quest Diagnostics. Children are more likely than adults to have them; 53% of children ages 2-17 who get tested are sensitive to at least one allergen, compared with 37% of adults.

Adults and children who have asthma are 20% more likely than those who don't to have allergies (53% of those with asthma have allergies, compared to 44% of those who don't). Asthma patients have an average of 4.1 allergies, compared to 3.4 for patients who don't have asthma. Asthma is more likely to be linked with indoor allergies such as mold, dust mites, and pets, than with food or pollen allergies.

Men and boys are more likely than girls and women to have allergies. Allergy rates are growing across demographics, however. Overall sensitivity to common allergens grew 6% during the four-year period studied, and the number of patients having tests done increased 19%.

Environmental allergies are growing fastest, likely due to climate change: allergies to ragweed grew 15%, and allergies to mold grew 12%.

U.S. CITIES WITH HIGHEST ALLERGY RATES, 2011

OVERALL	RAGWEED	MOLD	FOOD	DUST MITES
Dallas	Phoenix	Dallas	Baltimore	Miami
Phoenix	Las Vegas	Riverside, CA	Seattle	San Diego
Baltimore	Kansas City	Phoenix	Cincinnati	San Francisco
Washington, DC	Riverside, CA	Los Angeles	Washington, DC	Orlando
Boston	Dallas	Chicago	Boston	Boston

SOURCE: Quest Diagnostics

SOURCE: "Allergies Across America, Allergy Report 2011," Quest Diagnostics, Nicholas Conti, VP Business Development, 3 Giralda Farms, Madison, NJ 07940; 973-520-2901; www.questdiagnostics.com. Study is available for download at: www.questdiagnostics.com/healthtrends.

Nearly One In 10 Kids Have Food Allergies

Nearly one in 10 children under age 18 (8%) — or 5.9 million U.S. children — have food allergies, according to research published in the journal *Pediatrics*. Of those children, 39% have severe allergic reactions, and 30% have multiple food allergies. Children are most commonly allergic to peanuts (25%), milk (21%), and shellfish (17%).

Asian and Black children are more likely than White children to have food allergies, but are less likely to have them formally diagnosed.

SOURCE: "The Prevalence, Severity, And Distribution Of Childhood Food Allergy In The United States," *Pediatrics*, 2011; Children's Memorial Hospital, Ruchi Gupta, Study Author, rugupta@childrensmemorial.org.

A Global Look At Childhood Obesity

One in three parents worldwide (32%) worry about the issue of childhood obesity in their own home, according to Synovate eNation. Those living in Brazil (82%), Chile (76%), and Egypt (75%) express the most concern. Parents in Denmark (83%), the UK (81%), and the U.S. (80%) are most likely to be unconcerned about obesity in their own home.

However, although parents in Denmark, the UK, and the U.S. may not feel obesity is a problem at home, the majority feel childhood obesity is a problem for their country (71%, 66%, 69%).

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.

Children's Habits And Attitudes Toward Food And Exercise

Black and Hispanic children aged eight to 17 (75% and 65%, respectively) are more likely than White children the same age (56%) to eat a lunch prepared by their school, finds the American Dietetic Association. Nearly half of Black children (48%) buy a meal or snack from a school vending machine or snack bar, compared to 32% of Hispanic children and 22% of White children.

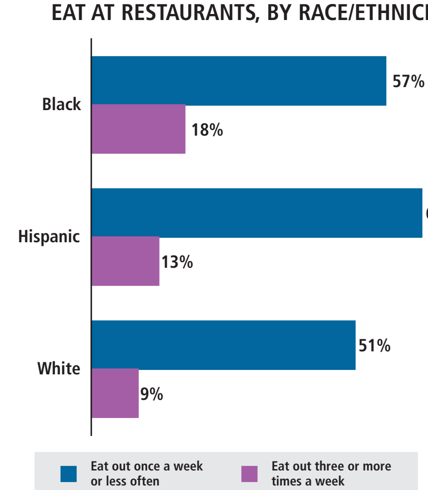
The meal they most commonly skip is breakfast with 37% of Black children, 24% of Hispanic children, and 22% of White children saying they only eat breakfast occasionally. Only 5% each of Hispanic and Black children skip dinner, as do 3% of White children.

Hispanic children (50%) are more likely than White (45%) and Black children (43%) to eat a meal with an adult in their family at least once a day.

A majority of Hispanic children (56%) would be interested in meeting with a registered dietician to learn how their diet affects their health, compared to 47% of Black children and 27% of White children. Hispanic children (46%) are also more likely than Black (40%) and White children (27%) to be interested in meeting with a dietician to learn how to prepare a healthy meal.

Children say they would be more physically active if their school offered more fun programs before school (59% to 79% depending on their race/ethnicity), during classes (80% to 89%), and after school (77% to 92%). They also say they

FREQUENCY WITH WHICH CHILDREN AGED 8-17 EAT AT RESTAURANTS, BY RACE/ETHNICITY



SOURCE: American Dietetic Association would be more active if there were more safe places to play in their neighborhood (66% to 86%) and if their friends wanted to do more physical activity (87% to 89%).

SOURCE: "Family Nutrition And Physical Activity Survey," American Dietetic Association, Ryan O'Malley, 120 S. Riverside Plz., #2000, Chicago, IL 60606; 312-899-4769; romalley@eatright.org; www.eatright.org.

One In Four Kids, Teens Take Prescription Meds

One in four children and teens regularly take a prescription medication, according to Medco Health Solutions. Unlike older Americans who take a wider variety of medications, prescriptions for those under 19 are concentrated in three categories: ADHD, antibiotics, and asthma/COPD. Insurance companies spend $233 on drug plans for those under 19, compared to $1,833 on covering those over 65.

SOURCE: Medco Health Solutions, Robert Epstein, Chief Medical Officer/President Research Institute, 100 Parsons Pond Dr., Franklin Lakes, NJ 07417; 201-269-3400; medcoresearchauthors@medco.com; iwww.medco-health.com.

Kids, Teens Notice, But Aren't Influenced By, Menu Calorie Info

Children and teens under 17 order meals containing an average 650 calories per each fast food visit, according to a study by New York University's School of Medicine and Wagner Graduate School of Public Service. The study reviews the ordering habits of children and teens living in low-income communities before and after restaurants began posting calorie information. Half notice the calorie information, though only 9% say it influences their order.

In order to get kids to lower their calorie count, researchers recommend restaurants provide an "anchor number" to give some context to the numbers. For instance, posting the total amount of calories a healthy adult or child should eat in a day.

SOURCE: Wagner Graduate School of Public Service, Rogan Kersh, Study Author, Associate Professor Public Policy, 295 Lafayette St., 2nd Fl., New York, NY 10012; 212-998-7400; rogan.kersh@wagner.nyu.edu.

Kid Fitness Drops Between 11 and 12

Genetics, socio-economic status, and gender may be more influential in combating childhood obesity than physical activity, according to research published in *Medicine & Science in Sports and Exercise.*

The study finds the most active children come from races/ethnicities with the highest levels of obesity. Black children engage in the most physical activity, while White children are the least active. Researchers believe childhood obesity may be more linked to the fact the child's parents are also overweight and these families consume more sugar-sweetened beverages and high-fat foods. They also point out that White children may be participating in activities that are unable to be monitored by accelerometers, such as swimming and biking.

Researchers find children, regardless of race/ethnicity, experience a sharp decline in physical activity between ages 11 and 12. Children 6-11 engage in twice as much physical activity than those age 12-19.

Boys are also significantly more likely than girls to be physically active. In fact, normal weight girls are less active than their obese boy counterparts.

SOURCE: "Physical Activity in U.S. Youth," *Medicine & Science in Sports & Exercise,* Donna Spruijt-Metz, Author, University of Southern California, Keck School of Medicine, 213-324-7077; dmetz@usc.edu.

Teens Nip And Tuck — Mostly Their Noses

The most common cosmetic procedures among teens ages 13-19 in 2010 were nose reshaping, male breast reduction, ear surgery, laser hair removal, and laser treatment of leg veins, according to the American Society of Plastic Surgeons. Some 218,909 teens had cosmetic surgery in 2010, accounting for only 2% of the total number of cosmetic treatments.

TOP TEEN COSMETIC PROCEDURES

Surgical Procedures

	TOTAL NUMBER	% CHG 2010 VS. 2009
Nose reshaping	35,005	0%
Male breast reduction	13,530	5%
Ear surgery	8,763	11%
Breast implants	8,525	4%
Liposuction	3,205	1%
Dermabrasion	2,907	7%
Eyelid surgery	1,922	2%
Chin augmentation	1,070	-8%
Breast lift	1,665	4%
Lip implants	171	-22%
Breast implant removal	78	8%
TOTAL	76,841	3%

Minimally Invasive Procedures

	TOTAL NUMBER	% CHG 2010 VS. 2009
Laser hair removal	66,664	2%
Laser treatment of leg veins	20,991	5%
Laser skin resurfacing	19,466	19%
Botox	13,467	13%
Chemical peel	5,474	2%
Soft tissue fillers (e.g. collagen)	4,885	15%
Sclerotherapy	2,030	-3%
TOTAL	142,068	5%

SOURCE: American Society of Plastic Surgeons

SOURCE: American Society of Plastic Surgeons, Plastic Surgery Foundation, 444 E. Algonquin Rd., Arlington Heights, IL 60005; 847-228-9900; www.plasticsurgery.org.

Teens Get Most Sleep, Gen X Least

Gen X (ages 30-45) and Boomer (46-64) adults get less sleep than members of Gen Y (19-29) and Z (13-18) do, according to the National Sleep Foundation. Teenagers get the most sleep — an average of seven hours, 26 minutes on weeknights, while Gen Xers get only six hours and 48 minutes. Despite getting more sleep than members of the two older generations, more than half of Gen Y adults (51%) and 46% of Gen Z teens say they rarely or never get a good night's sleep during the week.

More than half of teens (53%) and Gen Y adults (52%) take naps on weekdays, compared to 38% of Gen Xers and 41% of Boomers. Gen Xers and Boomers are less likely than members of the younger generations to feel their weekday routines don't allow for adequate sleep, even though they're sleeping fewer hours. Gen Xers are the heaviest users of caffeine (an average of 3.5 servings per day), though majorities of each group drink caffeinated beverages daily. Naps and coffee don't always help enough — more than half of adults (52%) admit to having driven while drowsy.

The sleep habits of Gen Xers and Boomers are similar in several ways; they get up at about the same time in the morning (6 a.m. on weekdays) and go to bed around the same time at night (11:12 p.m. for Gen Xers; 10:58 p.m. for Boomers). They're less likely than members of the two younger generations to catch up on sleep by napping or sleeping in on weekends.

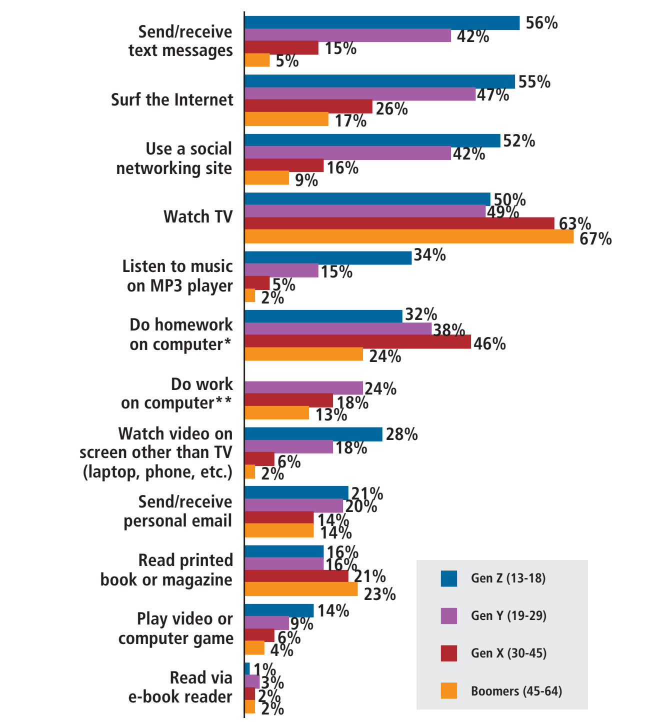
In addition, both Boomers and Xers are more likely than members of Gen Y or Z to read printed books or magazines before going to bed.

Teens and Gen Y adults are much more likely than Boomers or Gen Xers to use personal electronics close to bedtime, though all ages watch TV before bed.

Gen Y adults (38%) are more likely than teens (28%), Gen Xers (22%), or Boomers (12%) to sleep with their mobile phones nearby, with the ringers turned on.

SOURCE: "2011 Sleep in America Poll: Communications Technology in the Bedroom," National Sleep Foundation, Russell Rosenberg, Ph.D., Vice Chairman, 1010 N. Glebe Rd., #310, Arlington, VA 22201; 703-243-1697; nsf@sleepfoundation.org; www.sleepfoundation.org. Price: Available online at no charge.

ACTIVITIES ENGAGED IN DURING LAST HOUR BEFORE TRYING TO SLEEP, BY GENERATION

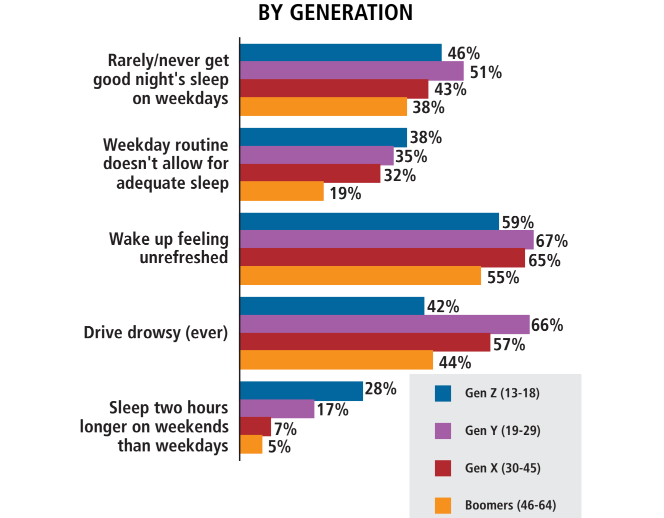


* Asked only of those who are in school.

** Asked only of those who are employed.

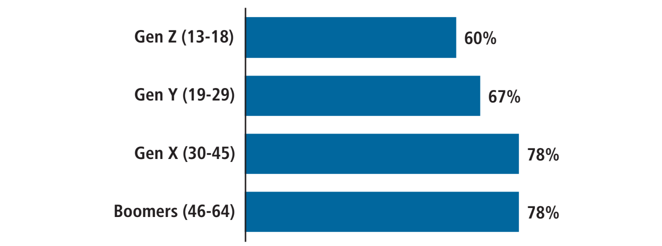
SOURCE: National Sleep Foundation

SLEEP HABITS OF U.S. ADULTS AND TEENS, BY GENERATION



SOURCE: National Sleep Foundation

AMERICANS WHO DRINK CAFFEINATED BEVERAGES DAILY, BY GENERATION



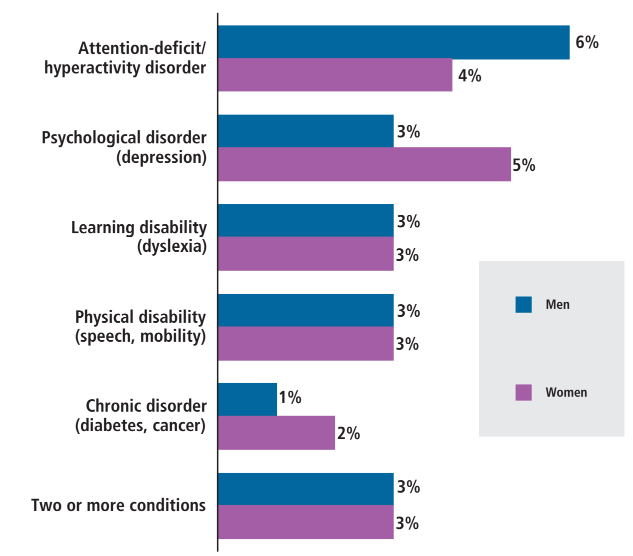
SOURCE: National Sleep Foundation

Male College Freshmen Suffer From ADD; Females From Depression

More college freshmen self-identify as having ADHD (5%) or a psychological disorder (4%) than any other disability or condition, according to the Higher Education Research Institute at UCLA. Girls are nearly twice as likely as boys to say they have been diagnosed with depression, while boys are more likely to say they have ADHD.

The number of students beginning college with a learning disability has steadily increased since the survey first started asking the question in 1983.

SELF-REPORTED DISABILITIES/MEDICAL CONDITIONS CLAIMED BY COLLEGE FRESHMEN, BY GENDER, 2011



SOURCE: Higher Education Research Institute at UCLA

SOURCE: Higher Education Research Institute at UCLA, Sylvia Hurtado, Director, 3005 Moore Hall, Box 951521, Los Angeles, CA 90095; 310-825-1925; www.heri.ucla.edu.

Young Hispanics Most Likely To Be Uninsured

Hispanic young adults ages 20-29 are less likely than their non-Hispanic peers to have health insurance, according to the National Center for Health Statistics. More than half (54%) of Hispanics in their 20s were uninsured in 2009, compared to 34% of non-Hispanic Blacks and 24% of non-Hispanic Whites.

Only a third (33%) of Hispanic young adults had private health insurance, compared to 43% of non-Hispanic Blacks and 66% of non-Hispanic Whites. Lack of insurance has a significant impact on how often people visit the doctor and whether they have a consistent source of medical care.

Most young adults with health insurance — whether private or through Medicaid — had regular doctors or other sources of routine medical care, with little variation by race/ethnicity. Among the uninsured, Hispanics (33%) were less likely than non-Hispanic Blacks (40%) or Whites (47%) to have regular sources of medical care.

Overall, six in 10 Hispanic young adults (61%) had visited doctors at least once in the preceding year, compared to 76% of both non-Hispanic Whites and non-Hispanic Blacks.

SOURCE: "Young Adults Seeking Medical Care: Do Race and Ethnicity Matter?" NCHS Data Brief No. 55, January 2011, National Center for Health Statistics, 3311 Toledo Rd., Hyattsville, MD 20782; 800-232-4636; cdcinfo@cdc.gov; www.cdc.gov/nchs. Price: Available online, free of charge.

One in Six Are Without Health Insurance

Nearly half of Americans (45.8%) have an employer-based health insurance plan, 25.3% have a government plan, and 11.2% have a different type of plan, according to Gallup Poll. The remaining 16.4% are uninsured. The proportion of uninsured rose above 16% in early 2009 and has hovered above that line since.

Hispanics (38.9%) are more likely than average to be uninsured, as are Blacks (20.2%). Whites (12.2%) and Asians (12.0%) are less likely than average to be without insurance.

Income also significantly affects insurance rates. Those with an annual household income of less than $36,000 (29.7%) are the most likely to be uninsured, with rates rising to 9.9% among those with annual household incomes of $36,000 to $89,999, and to 4.7% among those with annual household incomes of $90,000 or more.

The proportion of those without health insurance is inversely correlated to age: 28.0% of 18-26 year olds are uninsured, as are 25.5% of 27-35 year olds, 18.8% of 36-44 year olds, 14.9% of 45-64 year olds, and 3.1% of those aged 65 and older.

Rates of uninsurance are down most among Hispanics (down 1.0% between 2009 and 2010) and Asians (down 1.1%). Rates are up most among with annual household incomes of $36,000 to $89,999 (up 0.6% over the same period) and those aged 36-44 (up 0.5%).

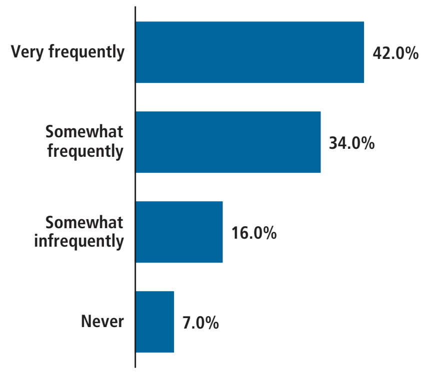
SOURCE: "Well-Being Index," Gallup, Elizabeth Mendes, Analyst, 901 F St. NW, Washington, DC 20004; 202-715-3030; www.galluppoll.com. Price: Available online at no charge.

Workers Don't Stay Home Sick

More than three quarters (76%) of workers say they often go to work when they're sick, even though 34% worry about picking up illnesses from coworkers who do the same, according to Accountemps.

Few employees (11%) say their managers discourage workers from staying home when they're sick; half say managers actively encourage them to stay home. Fewer than one in 10 workers (8%) are impressed by the dedication of coworkers who come in sick, and 31% are concerned about their well-being.

HOW OFTEN EMPLOYEES COME TO WORK WHEN THEY'RE SICK



SOURCE: Accountemps

SOURCE: Accountemps, Michael Weiss, Senior Public Relations Manager, 2884 Sand Hill Rd., #200, Menlo Park, CA 94025; 650-234-6383; michael.weiss@rhi.com; www.accountemps.com. Price: Contact for information.

Fish Oil Is Most Popular Supplement

Among users of dietary supplements, the most popular products are fish oil, multivitamins, vitamin D, calcium, and Coenzyme Q-10 (CoQ10), according to ConsumerLab.com. Use of vitamin D grew 52% between 2008 and 2010; 56% of supplement users purchased it in 2010.

Fish oil is rising in popularity; 76% bought it in 2010, up from 74% in 2009. Multivitamin use declined from 72% in 2009 to 70% in 2010.

Women are more likely than men to use vitamin D, calcium, or probiotics, while men are more likely to use CoQ10, glucosamine/chondroitin, vitamin E, nutrition powders and drinks, and herbs and extracts.

Adults ages 35-44 are more likely than those age 75-84 to take multivitamins (73% vs. 68%), while 75-84-year-olds are more likely to take vitamin D (65% vs. 48%).

Online retailers are the most popular source for dietary supplements, used by nearly half (47%) of buyers, up from 44% in 2009 and 40% in 2008.

SOURCE: 2011 Survey of Vitamin and Supplement Users Report. ConsumerLab.com, Lisa Sabin, VP for Business Development, 333 Mamorineck Ave., White Plains, NY 10605; 609-936-0770; lisa.sabin@consumerlab.com; www.consumerlab.com. Price: Contact for information.

Handwashing Is On The Rise

More than eight in 10 adults (85%) washed their hands after using public restrooms in 2010, up from 77% in 2007, and the highest proportion ever observed, according to the American Cleaning Institute. Nearly all adults (96%) claim to always wash their hands, however.

Women typically outperform men when it comes to post-restroom hygiene. More than nine in 10 women (93%) in public restrooms washed their hands in 2010, up from 88% in 2007. More than three quarters of men in public restrooms (77%) washed their hands, up from 66% in 2007.

Adults have become more truthful about their handwashing behavior — researchers found smaller gaps between observed and self-reported behavior in 2010 than in 2007.

Location affects handwashing behavior; men are least likely to wash their hands at sports stadiums and most likely to wash them at museums. Women are least likely to wash their hands at train stations and most likely to wash them at museums and sports stadiums.

- 89% of adults say they always wash their hands after using the bathroom at home.
- 82% say they always wash their hands after changing diapers.
- 39% say they always wash their hands after sneezing or coughing.
- 27% say they always wash their hands after handling money.

More than seven in 10 adults (74%) use antibacterial soap, according to a separate study from the same organization.

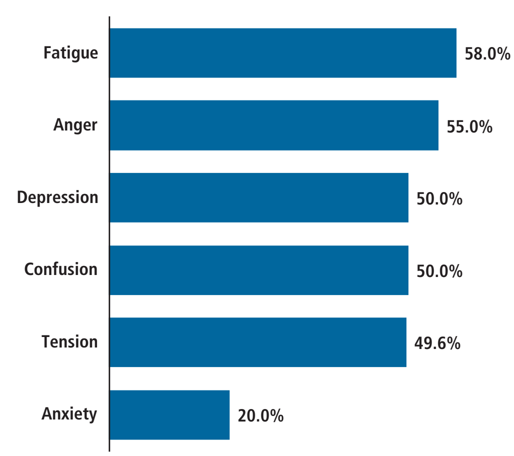
SOURCE: American Cleaning Institute, Brian Sansoni, 1331 L St., NW, Ste. 650, Washington, DC 20005; 202-347-2900; bsansoni@cleaninginstitute.org; www.cleaninginstitute.org. Price: Contact for information.

Videogames Reduce Depression

Playing casual videogames (such as puzzle games) ameliorates symptoms of clinical depression and anxiety in adults, according to a study at East Carolina University.

The study — which used psychological, biochemical, and psycho-physiological measurements to assess changes in

REDUCTION OF DEPRESSIVE SYMPTOMS THROUGH PLAY OF CASUAL VIDEOGAMES
(% reduction after one month of play)



SOURCE: East Carolina University

depression symptoms — found a 57% average reduction in symptoms.

Videogame play produced both short-term (after 30 minutes of play) and cumulative long-term (after one month of play at least three times a week) improvements.

Participants experienced significant reductions in tension, anger, fatigue, and other symptoms associated with clinical depression, and a 33% increase in vigor. Overall mood improved 65%, and somatic (physical) symptoms improved an average of 36%.

SOURCE: "The Efficacy of Prescribed Casual Videogames in Reducing Clinical Depression and Anxiety," Carmen Russoniello, Ph.D. et al, East Carolina University, College of Health and Human Performance, Minges Coliseum, Greenville, NC 27858; 252-328-4630; russonielloc@ecu.edu; www.ecu.edu/biofeedback. Price: This study is available online at no charge.

factoids

- Americans are more likely to want to **lose weight** because they don't like the way they look (40%) than because they feel unhealthy (27%). *(Herbalife; phone: 310-237-2703)*
- One in 10 Americans ages 18 and older (9.6%) have been to a **hospital** in the past month because of their own illness or that of someone they know. *(Packaged Facts; phone: 240-747-3095)*
- Patients who stay in **hospitals** during February are less satisfied with their hospital experience than those who stay at other times of the year. *(Press Ganey Associates; phone: 574-232-3387)*
- Dentists recommend that people **brush their teeth** for two minutes; the average American brushes for 27 seconds. *(Procter & Gamble; phone: 513-983-1100)*
- One in five wearers of **prescription eyeglasses** (20%) sometimes drive while wearing non-prescription sunglasses instead. *(Essilor of America; phone: 214-496-4463)*
- Women who drink one or more cups of **coffee** daily have a 22%-25% lower risk of having a stroke than those who drink less coffee. *(Susanna Larsson, Ph.D., National Institute of Environmental Medicine, Karolinka Institute, Stockholm, Sweden; phone: 011-46-8524-86059; email: susanna.larsson@ki.se)*
- People whose spouses **nag** them frequently are 300% more likely to develop heart disease than those with more easy-going partners.*(Rikke Lund, M.D., Ph.D., Institute of Public Health, University of Copenhagen; phone: 011-45-353-27992; email: rilu@sund.ku.dk)*
- Residents of Massachusetts are most likely to have **health insurance**; those who live in Texas are least likely. *(Gallup; phone: 202-715-3030)*
- The average **prescription drug** label lists 70 potential side effects. *(Jon Duke, Assistant Professor, Indiana University School of Medicine; phone: 317-423-3232)*
- More than a third (36%) of consumers who use **homeopathic medicines** heard about them from friends or family members. *(Boiron; phone: 610-325-7464)*
- Four in 10 Americans ages 45-64 have been to a **therapist** or psychiatrist, but only 23% of those 65+ have. *(60 Minutes/*Vanity Fair *Poll; phone: 212-286-8180)*
- Fewer than half of Americans (46%) plan to get **flu shots** in 2011. *(Rasmussen Reports; phone: 732-776-9777)*
- Some 32 million Americans take three or more **medications** daily. *(PhRMA; phone: 202-835-3400)*
- Only 37% of Americans are considered to be at a **normal weight**. *(Gallup; phone: 202-715-3030)*
- Nearly seven in 10 Americans who **smoke** (69%) say they want to quit; 52% have tried within the past year. *(Centers for Disease Control and Prevention; phone: 800-232-4636; cdcinfo@cdc.gov)*
- Three quarters of Americans (75%) say they don't always take **prescription medications** as directed. *(National Council on Patient Information and Education; phone: 301-340-3940)*
- Just over a quarter of men (28%) **floss** their teeth daily. *(*Glamour*; phone: 212-286-2860)*

home

Although a similar proportion of homeowners planned home improvement projects in 2011 as did so in 2010, the amount they planned to spend on these projects was just over half what it was in 2010. Americans' continuing concern over whether their homes will hold value may be one reason they're holding back on investing too heavily in remodeling projects.

Some homeowners are looking to move into rentals, primarily for the flexibility renting offers in case they need to relocate for a job. The Internet is a key resource for apartment hunting — including real estate listings, classified ads, and search engines.

The average U.S. woman spends twice as much time as the average man doing household tasks or taking care of children on a typical day. Although three in 10 men say they do the majority of the household cleaning in their homes, six in 10 women say they do all of it. Regardless of who's doing the cleaning, products that help get the job done faster are highly sought-after. Parents are concerned that their cleaning products be child-safe, but some feel that safer products simply don't clean as well as standard ones.

Renters Want Up-To-Minute Info

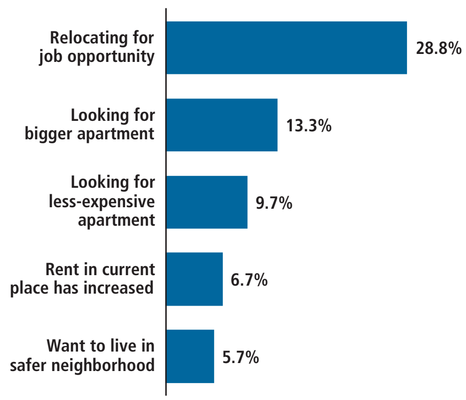
Eight in 10 apartment-hunters (81%) use online real estate listing services to find apartments for rent, according to Apartments.com. Other resources include online classifieds (46%), search engines (38%), word-of-mouth (31%), and local newspapers (27%).

Nearly two thirds (64%) say being able to check real-time availability of apartments is crucial to their search. Of the 80% of apartment-hunters who use their mobile phones to help them find rentals, half use smartphones.

Two in 10 people looking for apartments are current homeowners who are looking to switch to renting. Top reasons for moving include job opportunities and more space.

Among homeowners who are switching to renting, flexibility to be able to relocate for work is a chief motivation.

APARTMENT-HUNTERS' REASONS FOR MOVING



SOURCE: Apartments.com

SOURCE: "What Renters Want," Apartments.com, Tammy Kotula, Public Relations & Promotions Manager, 175 W. Jackson, 8th Fl., Chicago, IL 60604; 312-601-5249; tkotula@apartments.com; www.apartments.com. Price: Contact for information.

Homeowners Are Renovating On The Cheap

Almost two thirds of U.S. homeowners (64%) plan to tackle home improvement projects this year, compared to 62% who did so in 2010, according to American Express. The amount they expect to spend on renovations is significantly lower than last year, however — an average of $3,400, compared to $6,200 in 2010.

Homeowners' current reluctance to invest a lot of money in renovations may stem from concerns about whether their homes are holding value. Fewer than half (43%) believe they could sell their homes for their desired asking price if they were to put them on the market now.

More than six in 10 (64%) plan to do at least some of the work themselves, while 20% will hire contractors for all of the work, and 11% will ask family members to do the work. Among the do-it-yourselfers, 30% plan to ask friends and/or family for help, 21% plan to have contractors do some specialized projects, and 13% plan to do all of the work themselves.

Almost a third of those planning home improvements (30%) have set their sights on projects that will make their homes more environmentally friendly. Increasing energy efficiency is a popular goal; 16% will install energy-efficient windows and/or doors, 12% will add insulation, 11% will install energy-efficient roofing, and 10% will put in energy-saving heating/ventilation/cooling systems.

Indoor renovations are more popular than outdoor renovations. Bathrooms are the top target for room remodeling projects.

SOURCE: American Express Spending & Saving Tracker, March 2011, American Express, Leah Gerstner, 200 Vesey St., New York, NY 10285; 212-640-3174; leah.m.gerstner@aexp.com; www.americanexpress.com. Price: Contact for information.

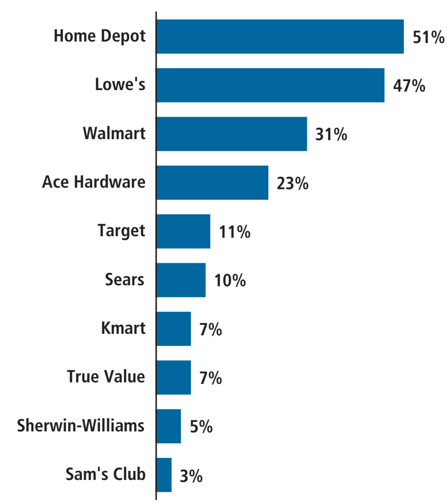
Landscaping Is Top Home Project

Landscaping and interior painting and/or wallpapering are the most common home improvement projects, undertaken by nearly three in 10 homeowners in the past year, according to Scarborough Research.

In all, 50 million homeowners have done landscaping projects and 47 million have painted or wallpapered their homes in the past year. About half that number have put in new carpeting or other floor coverings or remodeled their bathrooms.

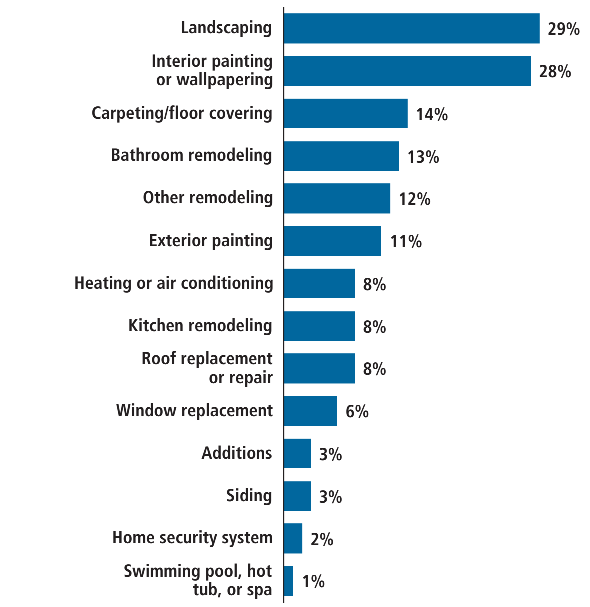
Home improvement warehouse retailers Home Depot and Lowe's are homeowners' top choices for remodeling supplies, but mass merchants also attract a significant number of home improvement shoppers.

WHERE HOMEOWNERS SHOP FOR HOME IMPROVEMENT PRODUCTS, 2011



SOURCE: Scarborough Research

HOME IMPROVEMENTS MADE BY U.S. HOMEOWNERS IN PAST YEAR, 2011



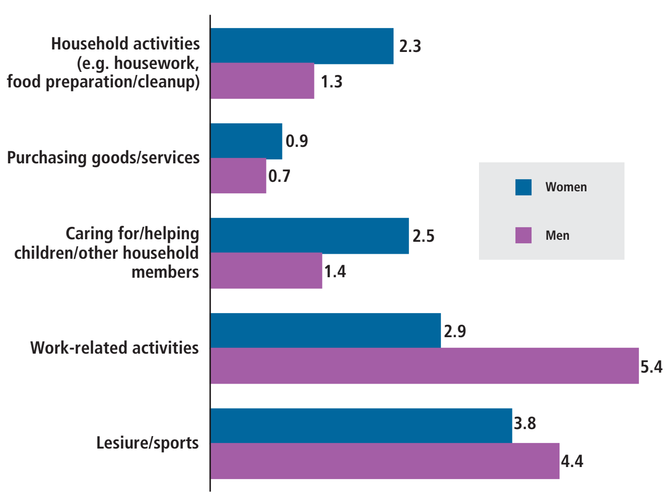
SOURCE: Scarborough Research

SOURCE: Scarborough Research, Allyson Mongrain, 770 Broadway, New York, NY 10003; 703-451-3174; amongrain@scarborough.com; www.scarborough.com

Household Tasks Divide Along Gender Lines

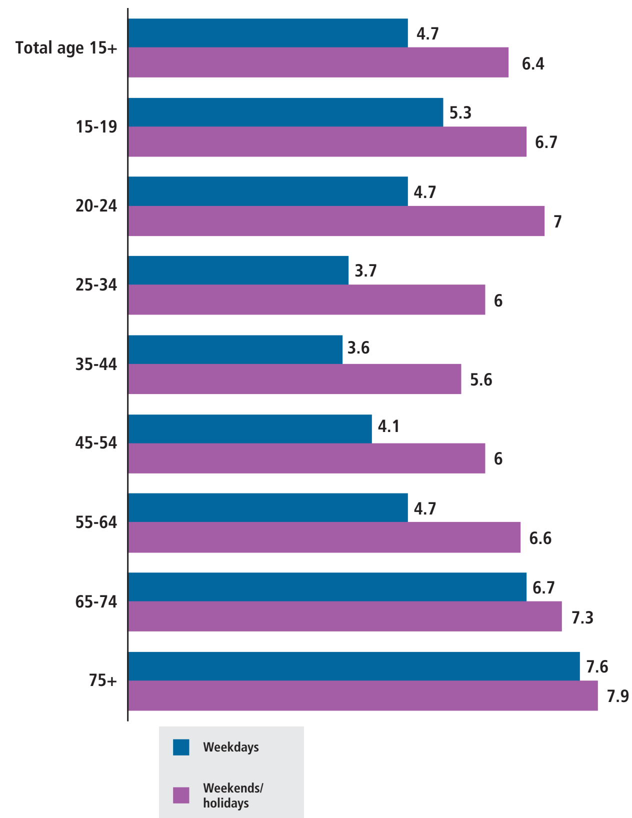
Women spend about twice as much time as men do performing household duties or caring for children on a typical day, according to the Bureau of Labor Statistics. This is true of both employed and non-employed adults.

DAILY HOURS WOMEN AND MEN SPENT ON VARIOUS ACTIVITIES IN HOUSEHOLDS WITH CHILDREN UNDER AGE 6, 2010



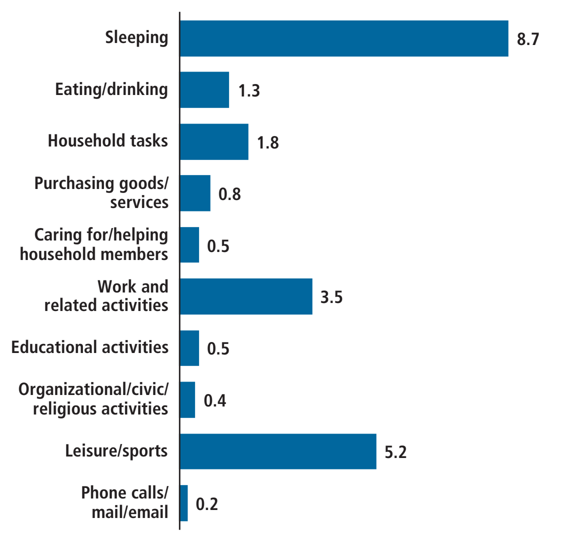
SOURCE: Bureau of Labor Statistics

DAILY HOURS AMERICANS SPENT IN LEISURE/SPORTS ACTIVITIES IN 2010, BY AGE



SOURCE: Bureau of Labor Statistics

DAILY HOURS ALL AMERICANS SPENT IN VARIOUS ACTIVITIES IN 2010



SOURCE: Bureau of Labor Statistics

On a typical day, 84% of women and 67% of men perform some type of household activities, including housework (49% of women and 20% of men), food preparation and cleanup

(68% of women and 41% of men), lawn and garden care (8% of women and 12% of men), and household management (21% of women and 14% of men). Three in 10 women (30%) and 20% of men spend time caring for or otherwise helping other members of the household on a given day.

Men spend more time than women do engaging in leisure activities or playing sports: an average of 5.6 hours per day, compared to 4.8 hours for women. Television occupies the bulk of Americans' leisure time; eight in 10 watch on a given day, for an average of nearly three and a half hours. Fewer than two in 10 (19%) play sports or exercise on a given day.

The division of labor in households with children splits along traditional gender lines. In households with no children under 18, the gender gaps in time spent on household tasks and work-related tasks are smaller but still significant.

SOURCE: "American Time Use Survey: 2010," June 22, 2011, Bureau of Labor Statistics, Division of Information and Marketing Services, 2 Massachusetts Ave., NW, Room 2850, Washington, DC 20212; 202-691-6339; atusinfo@bls.gov; www.bls.gov/tus

Cleaning Habits Stick With Women

More than nine in 10 women (94%) say they still use the cleaning techniques they learned as children, according to SC Johnson. Eight in 10 moms (81%) teach their daughters how to clean, and half of moms (50%) still call their own mothers for cleaning advice.

Almost eight in 10 women (79%) feel that the cleanliness of their homes is a direct reflection of themselves. Six in 10 women (60%) say they're responsible for all the cleaning in their households. Four in 10 (42%) say keeping their homes clean has become more important over the years.

SOURCE: "Scrubbing Bubbles Dirty Work Index," SC Johnson, Jam Stewart, 1525 Howe St., Racine, WI 53403; 262-260-2440; jmstewar@scj.com; www.scjohnson.com. Price: Contact for information.

Men Are Cleaning House, Too

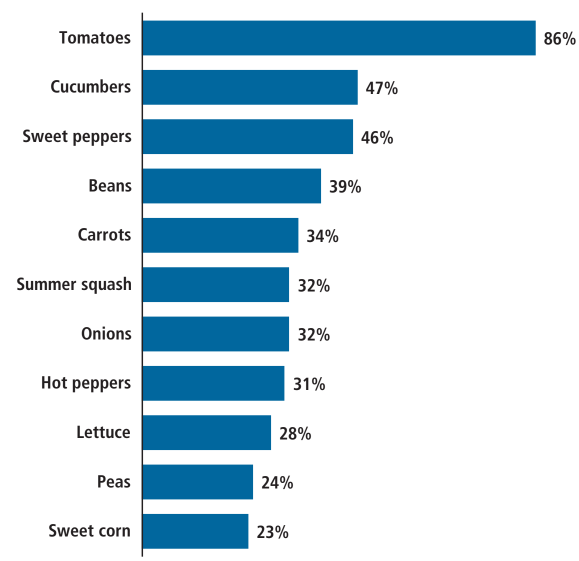
Three in 10 men (31%) say they do the majority of household cleaning in their homes, up from 17% in 2006, according to Mintel. Of these, 55% say housecleaning gives them a sense of accomplishment, compared to 62% of women who say so. Four in 10 women and men (42%) who do most of the cleaning at home say they'd pay extra for any product that enables them to clean faster.

Almost six in 10 adults with children under 18 at home (59%) are willing to pay extra for child-safe cleaning products, though another 20% feel that child-safe products don't clean as thoroughly as other products.

SOURCE: "Household Cleaning: The Consumer – U.S. – May 2011," Mintel, Jennifer Ballard, 351 W. Hubbard St., 8th Fl., Chicago, IL 60654; 312-932-0400; jballard@mintel.com; www.mintel.com. Price: £2,447 ($3,911).

factoids

- More than a third of Americans (36%) spend only 5-8 waking hours per day in their **homes**; 62% spend 12 hours or less. *(HomeGoods; phone: 508-390-1000)*
- U.S. homebuyers are less satisfied with **real estate companies** in 2011 than they were in 2010. *(J.D. Power & Associates; phone: 805-418-8000)*
- 21 million adults live in their **parents' homes**. *(U.S. Census Bureau; phone: 301-763-3691)*
- More than a quarter (26%) of U.S. Internet users have bought vegetable **seeds**, and 19% have bought garden fertilizer in the past year. *(Mintel International Group; phone: 212-796-5710)*
- Americans planned to spend an average of $61.16 on Independence Day **barbecues** in 2011, 12% more than in 2010. *(BIGresearch; phone: 614-846-0146)*
- More than two thirds (68%) of **home gardeners** who grow food are age 45 or older. *(National Gardening Association; phone: 802-863-5251)*
- The top reason **home gardeners** choose to grow their own food is to have better-tasting produce (58%). *(National Gardening Association; phone: 802-863-5251)*
- More than half (54%) of those who grow their own **vegetables or fruits** are doing it to save money on food bills. *(National Gardening Association; phone: 802-863-5251)*
- **MOST POPULAR VEGETABLES GROWN IN U.S. HOME GARDENS**



SOURCE: National Gardening Association; phone: 802-863-5251; www.garden.org

human behavior & attitudes

Americans think their society is becoming increasingly rude. Although they cite politics and pop culture as the least civilized spheres, half have experienced a lack of civil behavior in social networks and/or at their children's schools. More than nine in 10 wish others would exercise better etiquette when using their mobile phones in public — though nearly a fifth admit their own behavior isn't any better.

Lack of consideration for others may have its roots on the playground. Despite the best efforts of educators and media to ameliorate bullying among schoolchildren, children's self-reported behavior hasn't changed from 2008.

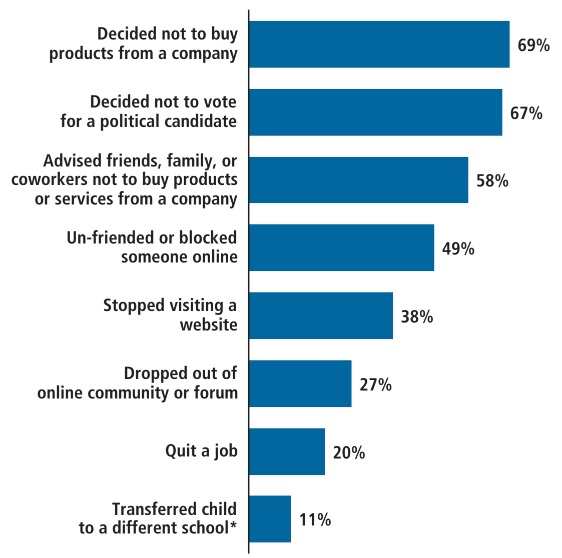
It's not our imagination that life is somewhat easier for beautiful people; attractiveness is correlated with a higher likelihood of happiness, and unattractiveness with lower likelihood. Among Millennials, most aspects of life are best experienced with friends and/or family. They're sociable in their shopping habits, eating habits, and of course online.

Society Is Becoming Increasingly Uncivil, Say Americans

Nearly two thirds of Americans (65%) feel that a lack of civility in U.S. society is a major problem, according to KRC Research for Weber Shandwick and Powell Tate. Another three in 10 consider lack of civility a minor problem. More than half (55%) expect the problem to get worse in the next few years, up from 39% who said so in 2010.

Americans consider politics (80%), pop culture (75%), the media (74%), the government (73%), the music industry (71%), and the general public sphere (70%) to be the most uncivil environments. Many have personally experienced incivility at work (43%), in online social networks (49%), and at their children's schools (50% of parents say so). Nearly seven in 10 (69%) feel that cyber bullying is getting worse.

ACTIONS AMERICANS HAVE TAKEN BECAUSE OF UNCIVIL BEHAVIOR



*Asked only of parents

SOURCE: Weber Shandwick

SOURCE: "Civility in America 2011," Weber Shandwick, Powell Tate, and LRC Research. Weber Shandwick, Jennifer Norton, Media and Marketing, The Americas, 919 Third Ave., New York, NY 10022; 212-445-8314; jnorton@webershandwick.com; www.webershandwick.com. Price: Available online at no charge.

Cause Tie-Ins Reduce Donations

Consumers who purchase products tied to a cause marketing program are less likely to also contribute money directly to the same charity (or others) than those who don't buy products with cause tie-ins, according to research at the University of Michigan. When given the opportunity to donate directly to a cause and/or buy cause-marketed products, the majority of consumers buy instead of donating.

Consumers tend to think of buying cause-marketed goods as a charitable act, and they give less as a result. Even when the marketer's contribution is factored in, a cause marketing program can decrease total donations to a charity.

Because people have an awareness that buying products as a means of giving to charity is not as selfless as giving money directly, the boost in happiness that typically accompanies donating to charity is also reduced.

SOURCE: "Can Supporting A Cause Decrease Donations and Happiness? The Cause Marketing Paradox," Aradhna Krishna, Ph.D., Dwight F. Benton Professor of Marketing, University of Michigan, Ross School of Business, 701 Tappan St., Ann Arbor, MI 48109; 703-764-2322; aradhna@umich.edu; www.umich.edu

Beautiful People Are Happier

Better-looking people tend to live happier lives than their less-attractive counterparts, according to economists at the University of Texas. There's a corresponding opposite effect; being unattractive decreases one's likelihood of being happy.

While the impact of beauty on happiness is not large (it's smaller than that of income, for example), it is significant. People whose looks are rated (by others) as being in the top third of attractiveness are 10% happier than those whose looks are rated as being in the bottom sixth.

Direct Vs. Indirect Impact

The authors estimate that at least half of beauty's effect on happiness is indirect — good-looking people tend to earn higher incomes and marry higher-earning spouses than less-attractive people. Other studies have shown that higher incomes lead to higher levels of happiness and satisfaction with life.

While beauty affects women's and men's happiness equally, its benefits for women are more likely to be both direct and indirect, whereas the benefits to men are largely indirect.

SOURCE: "Beauty Is the Promise of Happiness?" published by the Institute for the Study of Labor (IZA), March 2011, Daniel Hamermesh, Ph.D., et al, Department of Economics, University of Texas, Austin, TX 78712; 512-475-8526; hamermes@eco.utexas.edu; www.utexas.edu

Mobile Etiquette Is Deteriorating

Nine in 10 U.S. adults (92%) wish other people practiced better etiquette when using their mobile devices in public places, according to Ipsos research conducted for Intel. Nearly two in 10 (19%) admit to having bad mobile phone behavior themselves, but say they don't change because everyone else's behavior is just as bad.

More than half of adults (54%) have witnessed people using mobile devices while driving, 48% have seen people using them in public restrooms, and 32% have seen them used in movie theaters. Nearly a quarter say they've seen someone using a laptop while driving.

Bad behavior with mobile devices is a source of annoyance for many; 65% get angry with people who practice poor mobile etiquette, and 88% say people rarely think about the impact of their behavior on others when using mobile devices in public.

Top complaints include:

- Using mobile devices while driving (73%);
- Talking too loudly on mobile phone when in public (65%); and
- Using mobile while walking down street (28%).

Three quarters of adults (75%) think mobile manners are getting worse. Respondents say they see five examples of bad mobile etiquette on a typical day.

SOURCE: Intel, "2011 State of Mobile Etiquette Survey," Jessica Hansen, 2200 Mission College Blvd., Santa Clara, CA 95054; 408-765-8080; jessica.l.hansen@intel.com; www.intel.com. Price: This study is proprietary.

Most Adults Devote Time To Groups

Three quarters of U.S. adults (75%) participate in voluntary groups of some kind, such as hobby, religious, and civic groups, according to the Pew Research Center. The average adult actively participates in 3.51 groups and devotes 5.64 hours per week to group-related activities.

Women are more likely than men to participate in religious or spiritual groups, consumer groups, support groups, groups for older adults, parent-teacher groups, book clubs, and arts-related groups.

Men are more likely than women to be involved in sports or recreation leagues (their own or their children's), sports-related fan groups, sports fantasy leagues, veterans organizations, and gaming groups.

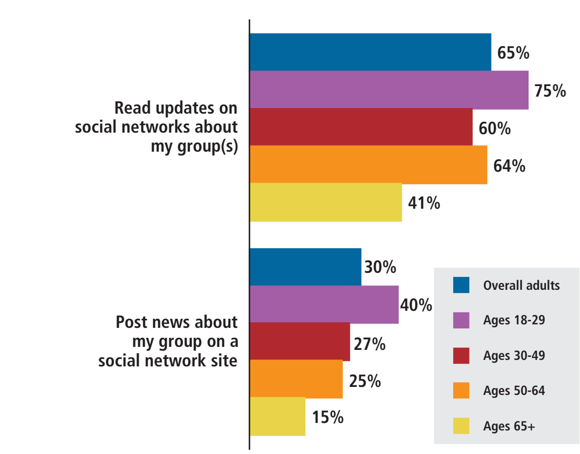
Internet users (80%) are more likely than those who are not online (56%) to participate in groups, and users of social media are even more likely to do so: 82% of Facebook users and 85% of Twitter users do.

Internet users tend to be more actively engaged in group activities than non-users, and their deeper level of involvement is reflected in their attitudes about their groups' activities and accomplishments.

Six in 10 Internet users (62%) — compared with 47% of non-users — say that in the past year they've felt really proud of something their group has accomplished or a positive difference it's made. Nearly half (48%) of Internet users and 35% of non-users say they've accomplished something within their group that they couldn't have done themselves.

Use of the Internet and social media helps group members stay connected to one another, draw public attention to issues of interest to the group, recruit new members, raise money, organize activities, and accomplish other goals.

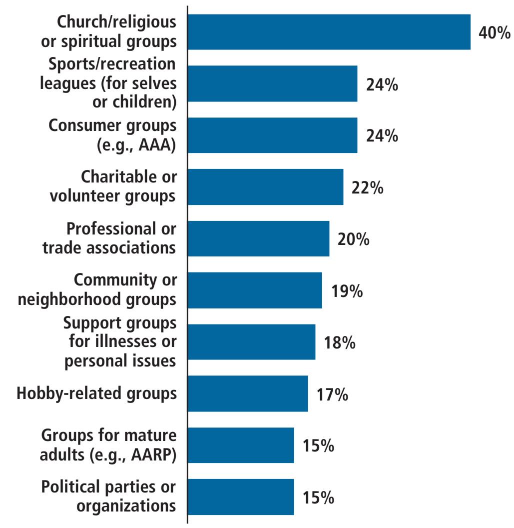
USE OF SOCIAL MEDIA IN GROUPS, BY AGE



NOTE: Sample is social network users who participate in groups.

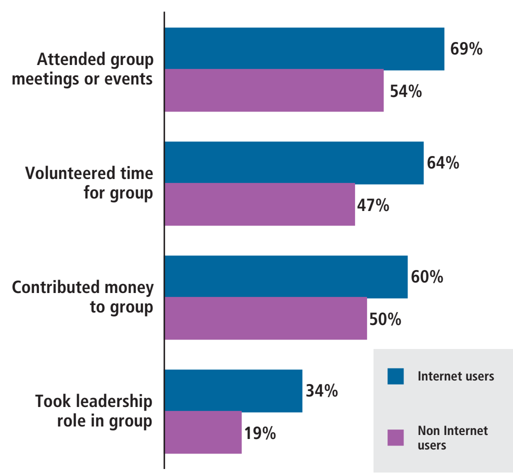
SOURCE: Pew Research Center

TOP 10 TYPES OF VOLUNTARY GROUPS, BY PERCENTAGE OF U.S. ADULTS WHO PARTICIPATE



SOURCE: Pew Research Center

PARTICIPATION IN GROUP ACTIVITIES IN PAST 30 DAYS, INTERNET USERS VS. NON INTERNET USERS



SOURCE: Pew Research Center

HOW GROUPS USE THE INTERNET

Group has page on social networking site (e.g. Facebook)	48%
Group uses text messaging to communicate with members	42%
Group has a blog	30%
Group uses Twitter to communicate with members	16%

SOURCE: Pew Research Center

SOURCE: "The Social Side of the Internet," Pew Research Center's Internet & American Life Project, Lee Rainie, Director, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; info@pewinternet.org; www.pewinternet.org Price: No charge.

Millennials Take A Social Approach To Shopping And Eating, Exercise

Millennials take a social approach to shopping — they like to shop with friends and family, and seek friends' opinions before making big decisions.

Millennials (ages 16-34) are more likely than people ages 35 and older to go grocery shopping with spouses, children, and/or other family members, according to advertising and marketing agency Barkley. Millennial women are twice as likely as women ages 35+ to shop for clothing with friends, spouses, or relatives.

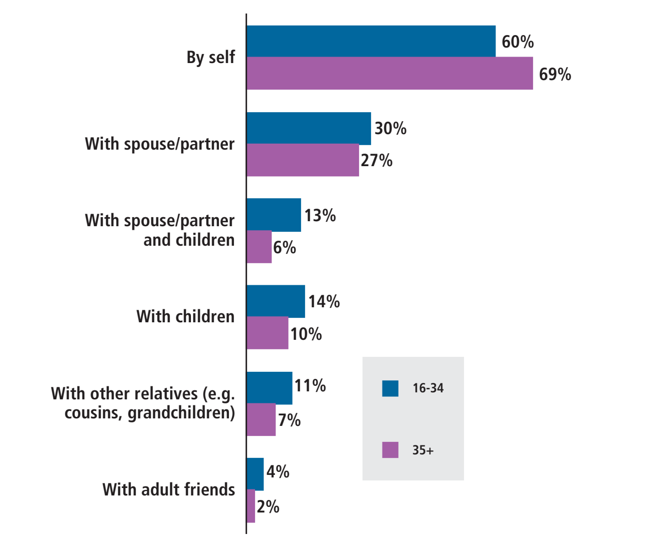
Millennials have far more connections on social networks than those ages 35 and older; more than half (55%) of 16-34-year-olds have 101 or more Facebook friends. Millennials are three times more likely than people ages 35+ to have more than 500 Facebook friends.

Millennials are significantly more likely than those 35 and older to seek input from their friends, family, and coworkers or classmates when choosing which products to buy and making bigger life decisions.

Millennials' friends provide more intangible kinds of support, too: the majority say that when their friends agree with their plans it makes them feel more excited about carrying them out.

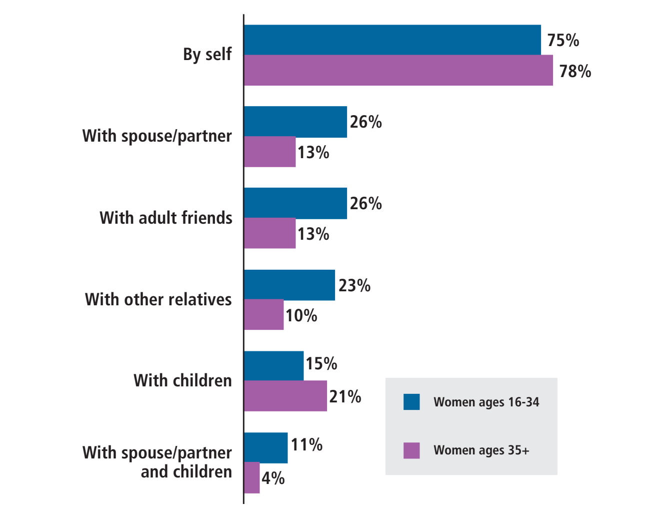
Millennials take a holistic approach to health and nutrition. Four in 10 think they eat healthier foods than their par-

HOW AMERICANS GROCERY SHOP — ALONE OR WITH COMPANIONS, BY AGE



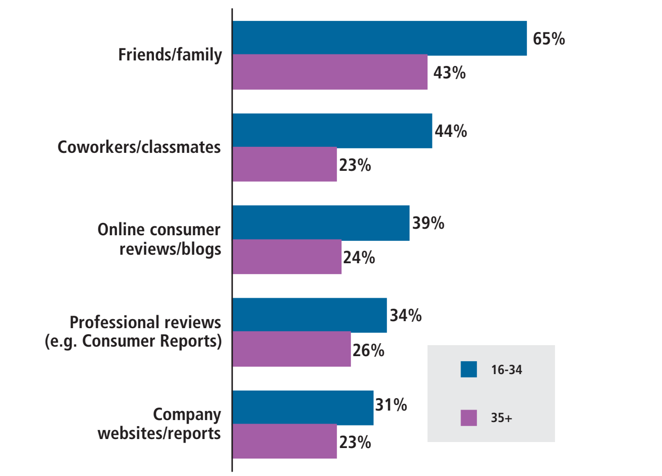
SOURCE: Barkley

HOW WOMEN SHOP FOR CLOTHES — ALONE OR WITH COMPANIONS, BY AGE



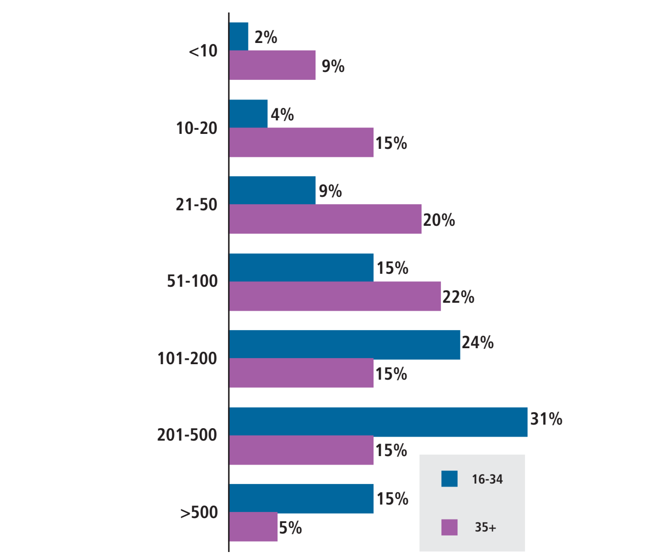
SOURCE: Barkley

INFLUENCES ON PRODUCT DECISIONS, MILLENNIALS VS. PEOPLE AGES 35+



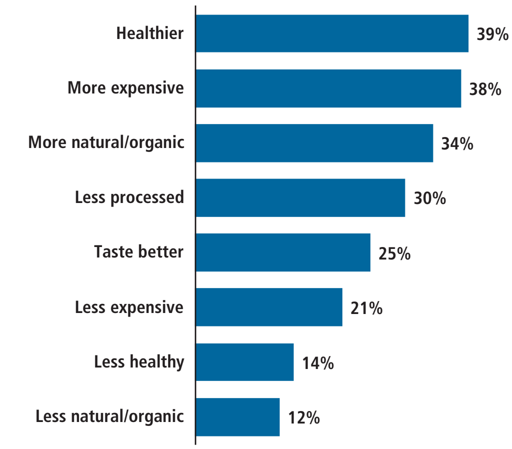
SOURCE: Barkley

HOW MANY FACEBOOK FRIENDS MILLENNIALS HAVE, VS. PEOPLE AGES 35+



SOURCE: Barkley

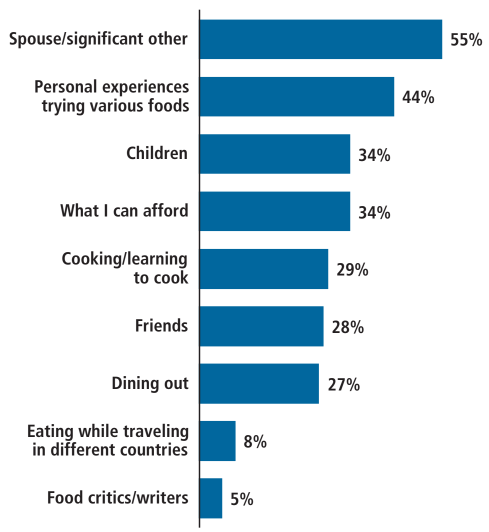
HOW MILLENNIALS BELIEVE THE FOODS THEY EAT COMPARE TO THOSE THEIR PARENTS EAT



SOURCE: The Hartman Group

INFLUENCES ON MILLENNIALS' FOOD/BEVERAGE PREFERENCES

(Respondents were asked to choose three)



SOURCE: The Hartman Group

ents, and they define that as being fresh, unprocessed, and natural/organic, according to The Hartman Group, which defines Millennials as ages 16-30. They're interested in exercise that can be easily and enjoyably integrated into their lives — such as bicycling to work, participating in group sports, and playing physical videogames such as Wii.

Millennials take a social approach to eating, and are less rigid about when and where they have meals; almost three in 10 (29%) say they tend to eat several small meals throughout the day rather than breakfast, lunch, and dinner.

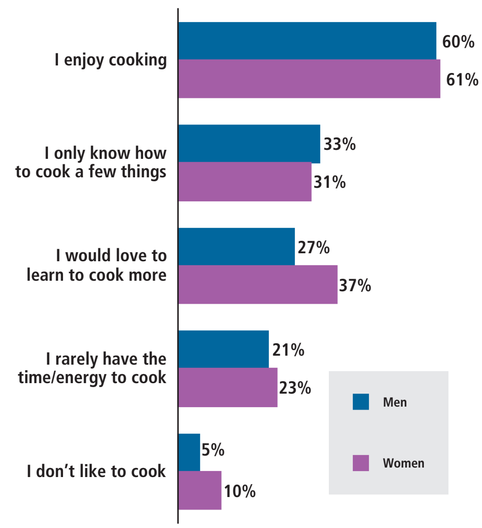
Compared with adults over 30, Millennials are less likely to feel comfortable eating a meal alone at home (45% vs. 54%), less likely to eat home-cooked meals regularly (39% vs. 51%), and more likely to eat whatever and whenever they feel like (39% vs. 30%).

Six in 10 Millennials say they enjoy cooking; men and women are equally likely to say so.

Although the majority of Millennials eat meat, they're more likely than Gen Xers or Boomers to eat vegetarian meals part or all of the time.

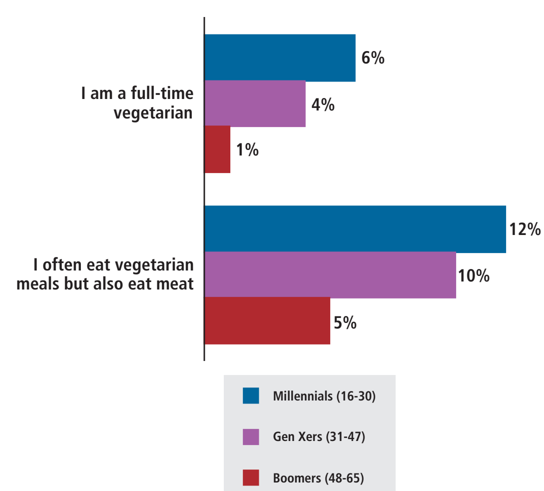
Six in 10 Millennials eat out at least once a week, compared to half of consumers over 30. They're more likely than older consumers to be influenced in their choice of restaurants by friends' recommendations or the wishes of people they're dining with — though their top criterion is what kind of food they're in the mood for.

MILLENNIALS' ATTITUDES ABOUT COOKING, BY GENDER



SOURCE: The Hartman Group

VEGETARIAN EATING, BY GENERATION



SOURCE: The Hartman Group

SOURCES: "American Millennials: Deciphering the Enigma Generation," August 2011, Barkley, Jeff Fromm, SVP Sales, Marketing & Innovation, 1740 Main St., Kansas City, MO 64108; 816-423-6195; jfromm@barkleyus.com; www.barkleyus.com. Price: Contact for information. [Detailed findings will be presented at the "Share. Like. Buy." conference, Sepember 22-23, 2011; www.sharelikebuy.com.]

"Culture of Millennials, 2011," The Hartman Group, Blaine Becker, Senior Director, Marketing & Business Relations, 3150 Richards Rd., #200, Bellevue, WA 98005; 425-452-0818, x124; blaine@hartman-group.com; www.hartman-group.com. Price: $15,000.

Most Millennials Give To Charity

More than nine in 10 Millennials ages 20-35 (93%) donated money to nonprofit organizations in 2010, according to a study by Johnson, Grossnickle and Associates in partnership with Achieve. Nearly eight in 10 (79%) volunteered their time to organizations.

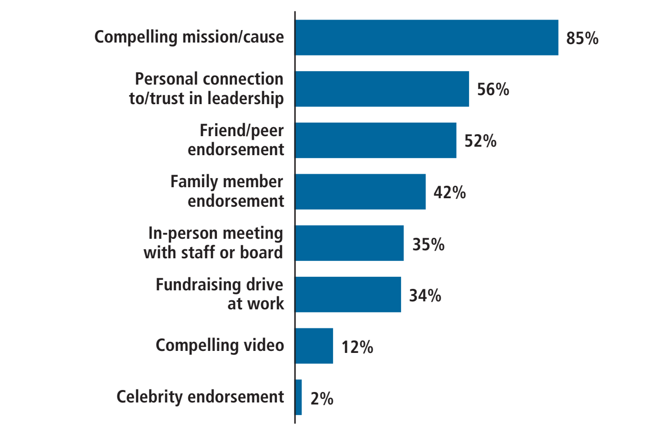
Most donors gave to more than one charity; 61% gave money to three or more. Millennials are more likely to give modest donations to multiple organizations than larger single gifts: 58% said their largest single donation was less than $150. More than a fifth (21%) made donations totaling $1,000 or more and 37% gave $500 or more over the course of the year, however.

When choosing whether to support a specific charity, Millennials are most concerned with the organization's primary mission or cause and how trustworthy its leadership is. They want to know how their donations will be used, and they want to see evidence that their support is making a difference.

More than eight in 10 (84%) say they're very (60%) or somewhat (24%) likely to support an organization they feel they can trust. Nine in 10 (90%) would stop giving money to an organization that lost their trust.

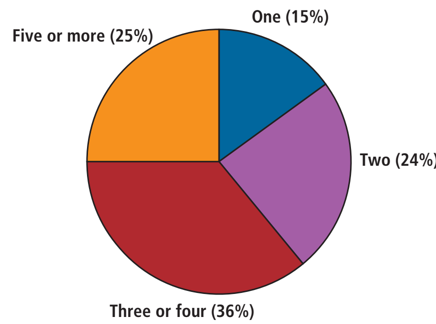
Millennials prefer to be contacted for charitable donations via email and to find out about nonprofit organizations on the Web, but they're most likely to give in response to personal requests through traditional channels. Rather than suggesting a disconnect between stated and actual preferences, the study authors believe it's a reflection of nonprofits not having caught up to Millennials' preferred communication styles.

FACTORS THAT MOTIVATE MILLENNIALS TO DONATE TO CHARITIES



SOURCE: Johnson, Grossnickle & Associates

NUMBER OF ORGANIZATIONS EACH MILLENNIAL DONOR SUPPORTED IN 2010



SOURCE: Johnson, Grossnickle & Associates

SOURCE: "Millennial Donors Report 2011," Johnson, Grossnickle and Associates, Deanna Lepsky, Marketing Associate, 29 S. Park Blvd., Greenwood, IN 46143; 317-215-2413; info@millennialdonors.com; www.millennialdonors.com.

Boys More Likely Than Girls To Bully, But Behaviors Remain Similar To 2008

Bullying may be in the news, but teens cite similar actions and behaviors as those in 2008, according to Josephson Ethics Institute. One in three teens (33%) says physical violence is a big problem at their school, compared to 36% who said the same in 2008. Half (50%) have bullied, teased, or taunted someone within the past year, compared to 53% in 2008.

Today's teens are equally likely as those in 2008 to mistreat someone because they belong to a different group (21% in 2010 vs. 22% in 2008), use a racial slur (42% each), hit a person because they were angry (52% vs. 54%), or take a weapon to school (10% vs. 11%).

Teens may share similarities to their 2008 counterparts, but there's a definite division between the sexes in 2010. Teen boys, for instance, are more than twice as likely as girls to "strongly agree" it's okay to hit or threaten a person who makes them angry (12% vs. 5%). Boys are slightly more likely to say they have never been bullied (55% vs. 50%) and to have bullied someone at least two times in the past year (33% vs. 21%). Girls, conversely, are more likely to feel physical violence is a problem at their school (37% vs. 30% for boys) and to say they answered the entire survey in complete honesty (76% vs. 73%).

Both boys and girls feel very safe at school (76% each) and say they could get alcoholic drinks if they desired (68% each).

SOURCE: "The Ethics Of American Youth, 2010," Josephson Institute, Richard Jarc, Executive Director, 9841 Airport Blvd., #300, Los Angeles, CA 90045; 310-846-4800; www.charactercounts.org.

July Fourth Parades During Childhood Linked To Republican Leanings

Experiencing one rain-free Fourth of July before age 18 increases the likelihood of voting for a Republican candidate at age 40 by one percentage point and raises the likelihood of identifying as a Republican by 0.76 percentage points, according to Harvard researchers.

The study analyzes the impact of Fourth of July celebrations during childhood on political preferences and behaviors later in life and finds the impact peaks at ages 7-10 and 15-18 among Republican voters. (Researchers used the absence of rain as a proxy for Fourth of July celebrations, since families are less likely to participate if it's raining, and events are often cancelled due to bad weather.)

The likelihood that individuals will attend political rallies, make campaign donations, and work for political parties as adults also rises with each rain-free July Fourth they experienced in childhood.

Researchers theorize that right-wing leaning is connected to participation in Fourth of July celebrations because children under age 18 are still forming their political beliefs; there tends to be a political congruence between the patriotism promoted at Fourth of July events and Republican beliefs, and the celebrations foster political participation.

However, these events appear to only support right-wing leaning. There's no evidence that Fourth of July events affect Democratic preferences. The researchers also believe more study should be done on the impact Fourth of July events may have on military enlistments and religious beliefs.

SOURCE: "Shaping the Nation: Estimating the Impact of Fourth of July Using A Natural Experiment," Harvard Kennedy School, David Yanagizawa-Drott, Author, david_yanagizawa-drott@harvard.edu.

Young Kids Believe What They Are Told

Three-year-olds are likely to trust information spoken to them even when it's incorrect, according to University of Virginia research published in *Psychological Science.*

The study had adults showing children a red and yellow cup and then hiding a sticker under the red cup. Adults randomly told children that the sticker was under the red cup, incorrectly under the yellow cup, or placed an arrow on the yellow cup without saying anything.

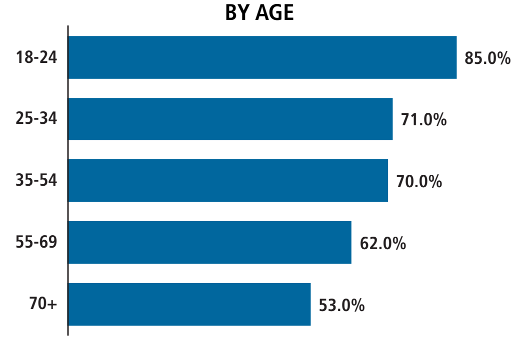
When the children were told to look under one cup to find a sticker, children who saw an adult use an arrow to point to the sticker under the yellow cup realized it was incorrect and quickly disregarded this information. However, those who heard the adult say the sticker was under the yellow cup continued to believe it would be there.

Researchers say children develop a specific bias to believe what they are told because parents typically tell them things they believe to be true.

SOURCE: "Young Children Have A Specific, Highly Robust Bias To Trust Testimony," *Psychological Science*, Association for Psychological Science, Vikram Jaswal, Author, University of Virginia, 434-243-2409; jaswal@virginia.edu; www.learningtothink.org.

factoids

- More than one in five men (22%) trim their **chest hair**. *(*Glamour*; phone: 212-286-2860)*
- One third of adults (33%) have hidden from family/friends in order to check their **email** while on vacation. *(Osterman Research; phone: 253-630-5839)*
- Single childless adults ages 18-34 are 60% more likely than overall adults to go to **bars or night clubs**. *(The Media Audit; phone: 713-626-0333)*
- Three quarters of U.S. adults (76%) say Americans are becoming **less civilized** and more rude. *(Rasmussen Reports; phone: 732-776-9777)*
- Almost four in 10 **parents** (37%) admit to having snooped on their kids by reading their email or checking the call log on their cell phones. *(Retrevo; phone: 855-738-7386)*
- More than one in five men (22%) have at least one broken **appliance** at home; 44% would rather buy a new one than fix the old one. *(*Men's Health*; phone: 610-967-5171)*
- Nearly one in 10 visitors to professional sports events (8%) are too **drunk** to drive home afterwards. *(Division of Epidemiology and Community Health, University of Minnesota, Darin Erickson, Ph.D.; phone: 612-626-0516)*
- A third (33%) of people attending **school reunions** show up to get a chance to compare their physical appearance with that of their former classmates. *(United Online; phone: 818-287-3000)*
- More than one in 10 Canadians (11%) say their **hair stylists** know more of their secrets than their significant others do. *(Ipsos Reid; phone: 416-572-4474)*
- More than half of Americans (57%) often **recommend** products and services to others, down from 75% who did so in 2008. *(Colloquy; phone: 513-248-9184)*
- Nearly half of women (46%) and 38% of men secretly wish they could throw away an item their significant other keeps on display at **home**. *(HomeGoods; phone: 508-390-1000)*
- **ADULTS WHO MADE NEW YEAR'S RESOLUTIONS FOR 2011, BY AGE**



SOURCE: IBOPE Zogby International; phone: 202-429-0022; www.ibopezogby.com

- Restaurant patrons in Philadelphia **tip** more than those in other cities — an average of 19.6%. New York City patrons tip 19.0% (the national average), and Los Angeles patrons tip 18.4%. *(Zagat Survey; phone: 212-404-6416)*
- More than a fifth of Americans ages 13-64 (22%) have **cell phones** with the ringers left on in their bedrooms when they go to sleep. *(National Sleep Foundation; phone: 202-347-3471)*
- Americans who participate in Independence Day parades as children are more likely to become **Republicans** as adults. *(Harvard Kennedy School, David Yanagizawa-Drott, Assistant Professor of Public Policy; phone: 617-495-8479)*

mature consumers

Americans age 60 and older are more likely than younger adults to be emotionally healthy and generally content with their lives. At the same time, however, Boomers are more likely than younger adults to be dissatisfied with the present situation — especially economic matters — in the U.S. They're also more likely than Americans of other ages to say their personal financial circumstances have been negatively affected by the recession.

Almost nine in 10 Boomers plan to continue working after they're eligible for retirement — but they're just as likely to do so out of a desire to stay active both mentally and physically as out of financial need. For many, retirement means relocation — usually to a warm climate.

Although they're more worried than younger adults about the recession's impact on their finances, mature Americans own most of the wealth in the U.S. and are the fastest-growing population in the U.S. workforce. Adults over 50 make half of all discretionary purchases in the U.S., but many retailers aren't set up in a way that appeals to older shoppers.

As people age, their shopping habits and preferences change. For many older adults, shopping is an opportunity to get out and socialize, and even to get a bit of exercise. More than two thirds of adults over 60 prefer to shop at small stores that are close to where they live. The older the shopper, the more likely he or she is to want to walk to the store rather than drive. They also prefer a small, well-edited selection of merchandise to an overwhelming array.

Baby Boomers Hold A Mix Of Negative And Optimistic Attitudes As Their Cohort Enters Its Senior Years

Baby Boomers, born between 1946 and 1964, began turning 65 at the start of 2011. They are entering their senior years as the U.S. attempts to crawl out of recession, which has left many Boomers feeling frustrated and depressed about the country and their personal situations. Boomers (80%) and those aged 65 and older (76%) are more likely than those aged 18-29 (60%) and 30-45 (69%) to feel dissatisfied with the way things are going in the U.S., according to the Pew Research Center.

In addition, 21% of Boomers say their standard of living is lower than that of their parents, compared to 14% of other adults. More than a third of Boomers (34%) believe their children will not have as high a standard of living as they have had, compared to 21% of other adults. Boomers (57%) are more likely than other adults to say their financial situation has gotten worse since the start of the recession. They are more likely than other adults to oppose federal programs that would cut their income:

- 80% of Boomers oppose taxing employer-provided health insurance benefits, compared to 72% of adults overall;
- 68% oppose eliminating the tax deduction for interest paid on home mortgages, compared to 56% of adults overall; and
- 63% oppose raising the qualifying age for social security benefits, compared to 58% of adults overall.

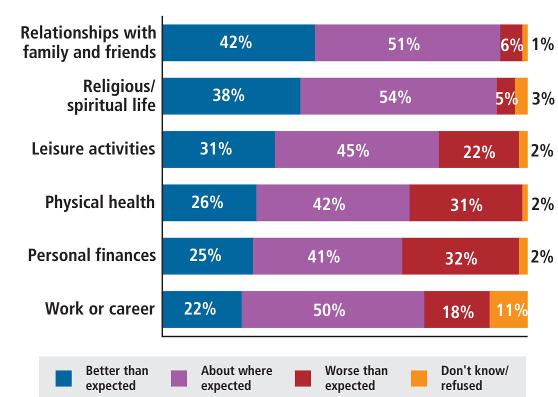
Boomers are more likely to say their physical health and personal finances are not as good as they expected than to say they are better than expected. It is therefore logical that they most commonly say they want to improve their health (35%) and finances (25%) over the next five years. On the other hand, their relationships with family and friends are far exceeding their expectations, as are their leisure time activities. Despite their recent financial challenges and their negative perceptions of the U.S.'s progress, 87% of Boomers turning 65 describe themselves as hopeful. The vast majority is also confident (84%) and optimistic (82%). Yet most (51%) say they are also uncertain and 43% are anxious. Seven in 10 (70%) say their lives are exciting, compared to only 25% who say life is boring.

Most Boomers (54%) do not plan to delay their retirement despite the financial challenges of the recession, according to Charles Schwab. The vast majority (88%) plans to continue to work after becoming eligible for retirement, though that decision is as much the result of needing the money (cited by 28%) as that they want to keep mentally, physically, and socially active (25%).

Boomers turning 65 in 2011 most commonly believe that "old age" begins at 80, yet 56% of them say they are now senior citizens. Those who think of themselves as seniors say it's because they're over 60 and that they get discounts, whereas those who disagree say it's because they still feel active and young at heart.

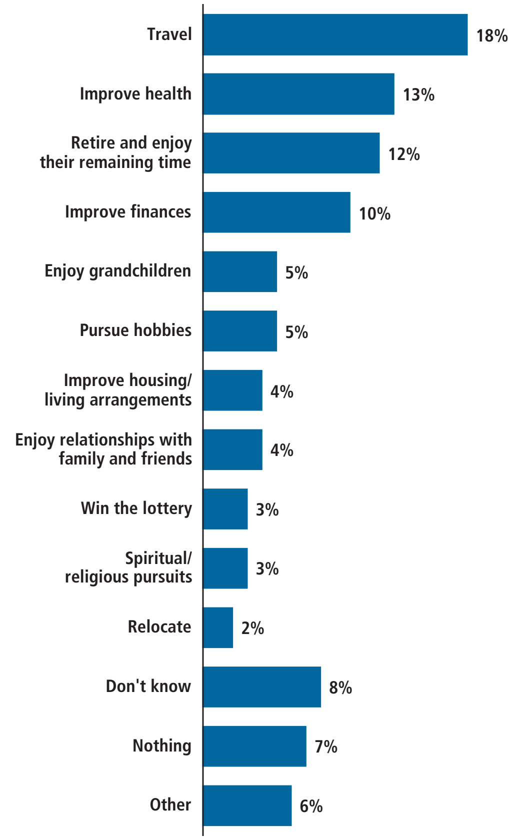
Nearly half of Boomers turning 65 (49%) say they are less active than they were 15 years ago, though 15% say they are

THE STATE OF BABY BOOMERS' LIVES, AMONG THOSE TURNING AGE 65 IN 2011



SOURCE: AARP

MAJOR AMBITIONS OR DREAMS BABY BOOMERS TURNING AGE 65 WOULD LIKE TO ACCOMPLISH IN THE NEXT FIVE YEARS, 2011



SOURCE: AARP

more active, according to Del Webb. Some 45% work out at least a few times a week. The vast majority does so for their health (88%), 50% to improve their appearance, 42% to reduce stress, and 22% to improve their self-confidence.

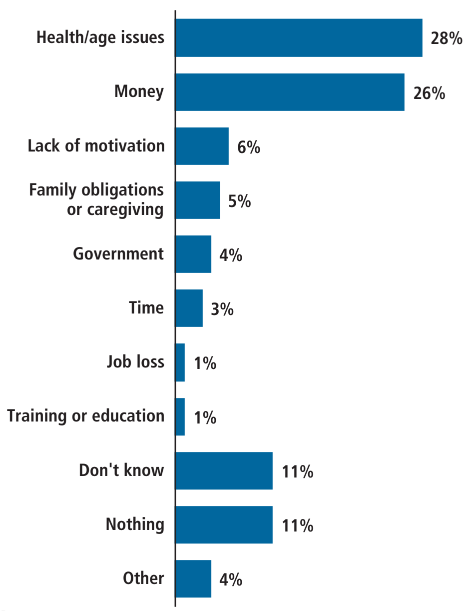
Nearly four in 10 (39%) have sought out new hobbies or educational opportunities in the past few years. Six in 10 (60%) have participated in volunteer activities, most commonly to keep busy andbecause it makes them feel good.

A third of Boomers turning 65 (32%) plan to move when they retire, and 34% have already moved upon retirement. They are most commonly considering moving to:

- North Carolina (19%);
- South Carolina (16%);
- Florida (15%);
- Tennessee (12%);
- Virginia (10%);
- Arizona (6%); and
- California (6%).

Whereas 45% have no preference in the type of community they move to, 35% would like it to include residents of all ages, and 20% would like it to be restricted to those over a certain age.

BARRIERS THAT BABY BOOMERS TURNING AGE 65 BELIEVE WILL KEEP THEM FROM ACHIEVING THEIR AMBITIONS OR DREAMS, 2011



SOURCE: AARP

SOURCES: "Real Life Retirement Survey," Charles Schwab, Matt Hurwitz, 211 Main St., San Francisco, CA 94105; 415-667-0480; matt.hurwitz@schwab.com; www.schwab.com. Price: Available online at no charge.

"Baby Boomers Approach Age 65 — Glumly," Pew Research 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.

"Approaching 65: A Survey of Baby Boomers Turning 65 Years Old," AARP, Jeff Love, 601 E. Street NW, Washington, DC 20049; 202-434-6279; jlove@aarp.org; www.aarp.org/research. Price: Available online at no charge.

"Baby Boomer Survey," Del Webb (PulteGroup), Eric Younan, 100 Broomfield Hills Pkwy, #300, Broomfield Hills, MI 48304; 248-433-4542; eric.younan@pulte.com; www.dwboomersurvey.com. Price: Available online at no charge.

Adults Ages 60+ Are Most Emotionally Healthy

Americans ages 60 and older are more likely than younger adults to be emotionally healthy and content with their lives, finds Gallup. The connection between emotional health and age holds true after controlling for other demographic and lifestyle factors such as gender, race, employment, marital status, and satisfaction with standard of living.

Emotional health is measured on a scale of 1-100, with scores over 90 indicating high emotional health. Survey participants are asked about the emotions they felt the previous day, such as learning, smiling, feeling enjoyment, being treated with respect, feeling worried, angry, sad, or stressed.

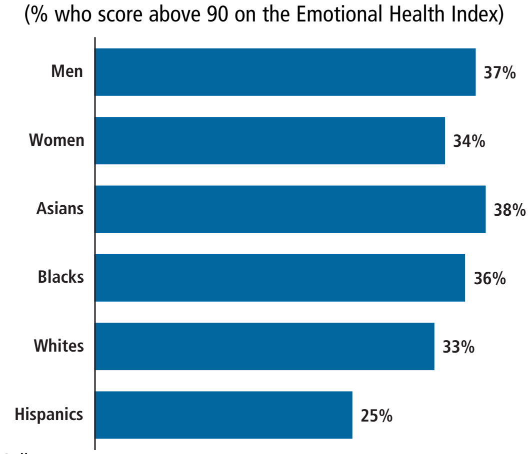
Emotional health is lowest during ages 25-54 — only about a quarter of Americans score above 90 during these ages — and peaks at about 36% among those ages 65 to 79. About a third of adults ages 80-94 have high emotional health scores.

College-educated adults are more likely than those with less education to have high emotional health scores late in life; 46% of adults age 65 and older with post-graduate degrees and 43% of those with bachelor's degrees have high emotional health scores, compared with 30% of those with high school diplomas or less education.

Asians are most likely to be emotionally healthy and Hispanics are least likely. Marriage does not necessarily confer good emotional health — perhaps, say the researchers, because of variations in relationship quality.

EMOTIONALLY HEALTHY ADULTS AGES 65 AND OLDER, BY GENDER AND RACE/ETHNICITY

(% who score above 90 on the Emotional Health Index)



SOURCE: Gallup

SOURCE: "Gallup-Healthways Wellbeing Index," January2010-June 2011, Gallup, Magali Rheault, Senior Consultant, Social and Economic Analysis, 901 F St., NW, Washington, DC, 202-715-3030; www.gallup.com

Older Consumers Shop Often, Differently Than Younger Adults

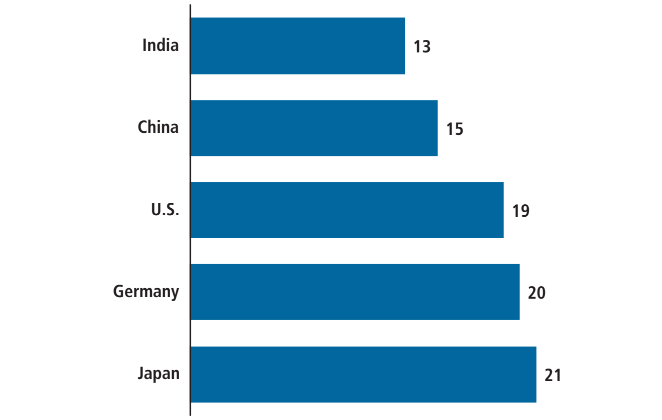
People over age 50 own 80% of financial assets in the U.S. and are responsible for half of all discretionary spending, according to A.T. Kearney.

Globally, the over-60 population is growing 2.6% annually, compared to 1.2% growth in the overall population. The population of adults age 80 and older is growing 4% per year.

By 2030, 22% of Americans will be age 60 or older. Americans age 65 and older and those age 75 and older are the fastest-growing segments of the workforce. By 2020, Americans age 60 and older will account for 24% of total household income in the U.S, according to A.T. Kearney's analysis of United Nations and U.S. Census Bureau data.

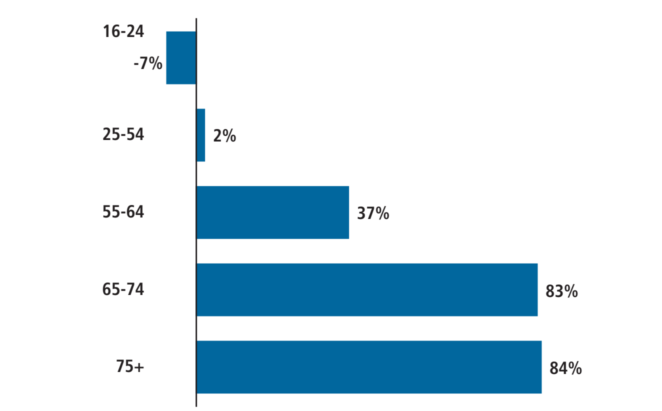
Mature consumers' shopping habits differ markedly from those of younger consumers — and in ways that run counter to many retailers' current configurations. More than two thirds of global consumers age 60 and older (68%) prefer to shop at smaller stores in close proximity to their homes. The older the shopper, the more likely he/she is to prefer walking to the store rather than driving.

AVERAGE NUMBER OF YEARS A 60-YEAR-OLD WILL LIVE "IN FULL HEALTH" IN VARIOUS COUNTRIES, 2010



SOURCES: World Health Organization, A.T. Kearney

PROJECTED GROWTH IN U.S. LABOR FORCE, BY AGE, 2006-2016



SOURCES: U.S. Bureau of Labor Statistics, A.T. Kearney

The majority — 63% of those ages 60-70 and 75% of those over 70 — would like to be able to sit down in stores. Product packaging is an issue for most, both in terms of ease of opening and size of print.

Consumers age 60 and older spend more of their income on food, beverages, and non-prescription healthcare products, and less on clothing and transportation than younger consumers do. Two thirds of 70-80-year-olds shop twice a week or more often.

For many mature consumers, shopping is a social activity and/or an opportunity to get some exercise. They're more likely than younger consumers to shop on weekdays and/or in mornings; they value friendly service over speed of checkout and well-edited and organized product selection over wide array of choices.

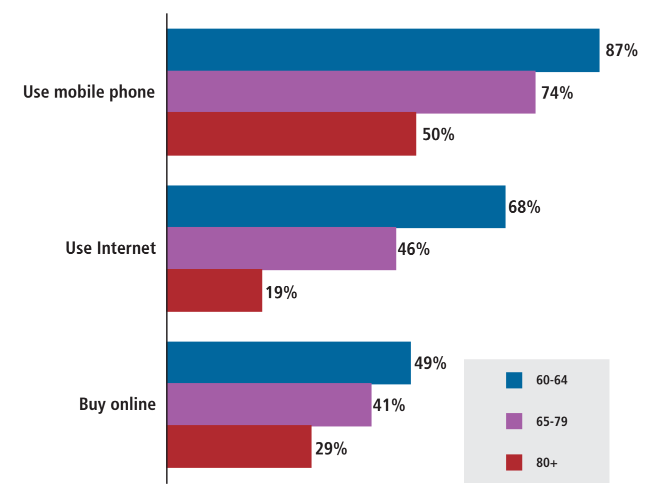
Mature consumers are less receptive than younger consumers are to promotions, especially those that require buying multiples or large sizes.

Four in 10 (43%) say they'll only buy products on promotion if they believe the quality is equal to their usual brand, and 22% say promotions have no impact on them. Just over a third (34%) buy products on promotion whenever possible.

Many of those 60 and older express negative views of advertising, finding it too focused on young people and too loud.

Among the 50% with Internet access, online shopping offers an alternative retail environment where information can be viewed in a comfortable type size and read at leisure. Almost seven in 10 (69%) have both mobile and landline phones, while 22% have landlines only, and 11% have mobile phones only.

USE OF INTERNET AND MOBILE PHONES AMONG GLOBAL CONSUMERS AGE 60 AND OLDER



SOURCE: A.T. Kearney

SOURCE: "What Do Mature Consumers Want?" May 2011, A.T. Kearney, Martin Walker, Senior Director, Global Business Policy Council, 8100 Boone Blvd., #400, Vienna, VA 22182; 703-891-5500; martin.walker@atkearney.com; www.atkearney.com. Price: Available online at no charge.

mobile devices & media

With the rapid rise of smartphone ownership, mobile has expanded from a communication device to one that connects users to information, interaction, entertainment, and commerce. More than eight in 10 adults have cell phones. Smartphones make up more than half of new cell phone purchases.

Americans have become very attached to their mobiles; more than a third use them for purposes other than voice calls before getting out of bed in the morning, and a similar proportion feel anxious when their phones are out of arm's reach. The majority even bring them into the bathroom.

Almost three in 10 cell phone owners expect their phones to become their primary entertainment devices. Smartphone owners use their phones for a much wider array of activities than owners of traditional cell phones — even those available on traditional cell phones, such as photos, music, and video.

Although mobile shopping is still in its early days, it's growing fast, and the medium has become an important adjunct to in-store shopping. Smartphone and tablet owners are receptive to promotions, coupons, and marketing via mobile. The majority remember mobile ads, and are comfortable making purchases from their devices. People who own both tablets and smartphones make more purchases via mobile than owners of just one of these devices.

When looking at mobile shopping, it's important to remember that mobile devices' role goes far beyond the purchase itself. They're used throughout the shopping process, for gathering product information, checking stock, looking for store locations and hours, reading reviews, comparing prices, looking for promotions, getting friends' opinions, downloading coupons, and so on.

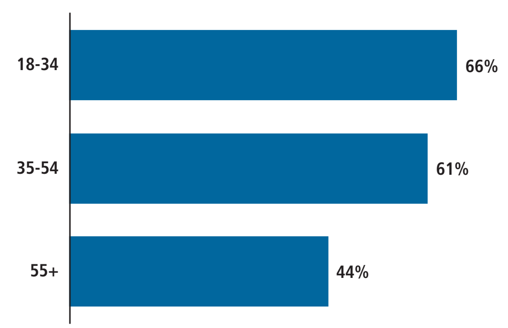
Majority Of Smartphone Owners Remember Mobile Ads

Six in 10 smartphone owners remember having seen a mobile ad, and two thirds (67%) remember the type of company or product in the ad, according to Greystripe. Mobile users under age 35 are more likely than older consumers to recall seeing mobile ads. Mobile users ages 18-34 are more likely than those ages 35-54 to remember the brand categories they see in mobile ads (72% vs. 63%).

Almost eight in 10 mobile users (79%) say they're comfortable making purchases from their mobile devices, according to JiWire. More than four in 10 smartphone owners (43%) have installed and used apps from specific retailers on their mobiles, but only 14% say the apps helped them make a purchase, according to Retrevo.

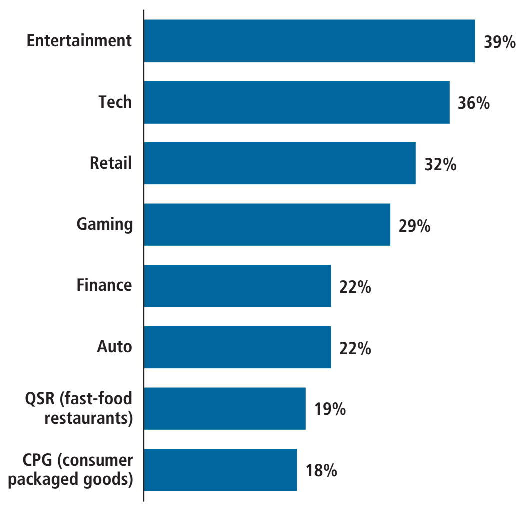
While the apps may not be succeeding in helping consumers make purchases from their phones, the majority of smartphone owners have used their mobiles to help them make purchases while they were in retail stores.

SMARTPHONE USERS WHO REMEMBER HAVING SEEN A MOBILE AD, BY AGE



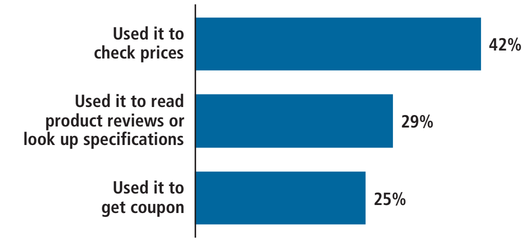
SOURCE: Greystripe

PRODUCT CATEGORIES FOR WHICH CONSUMERS HAVE SEEN MOBILE ADS



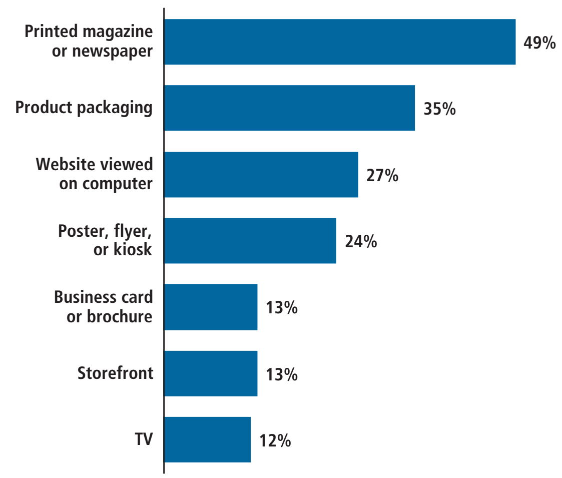
SOURCE: Greystripe

HOW SMARTPHONE OWNERS HAVE USED THEIR PHONES TO HELP THEM MAKE PURCHASES IN-STORE



SOURCE: Retrevo

SOURCES OF QR CODES SCANNED ON MOBILE DEVICES IN JUNE 2011



SOURCE: comScore

Shoppers do admit to sometimes using retail stores as places to check out products in person before buying online, however: 66% of shoppers overall and 78% of smartphone owners have looked at products in-store and later bought them online.

Coupons And Codes

More than four in 10 owners of smartphones and/or tablets (42%) say they've used their mobile devices to scan bar codes in-store or to show promo codes or text messages to cashiers, according to Proper Mobile Insights. More than a third have scanned QR codes using their phones or tablets (36%).

In June 2011, 14 million mobile users scanned QR codes with their devices (just over 6% of the total mobile audience ages 13 and older), according to comScore. Men comprised 61% of those who scanned codes that month, and 18-34-year-olds made up 53%. Almost six in 10 of those who scanned QR codes in June did so from their homes (58%), while 39% did so at retailers (multiple responses permitted).

Mobile users with household incomes of $100,000 or more are more likely than those with lower incomes to scan QR codes.

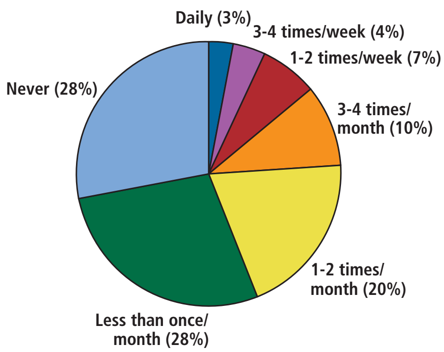
Almost half of smartphone and/or tablet users (47%) say they've received text messages with special offers on their phones, according to Prosper Mobile Insights. Email is the preferred way to receive coupons and special offers, however.

Location-Based Offers

Two thirds of smartphone/tablet users (67%) agree with the statement "Location-based mobile coupons are very convenient and useful" — 43% agree strongly, and 24% agree somewhat. More than four in 10 (45%) are concerned about security issues related to their location being tracked, although only 18% feel strongly about it.

More than seven in 10 mobile users (72%) purchase local deals, according to JiWire.

HOW OFTEN MOBILE USERS PURCHASE LOCAL DEALS



SOURCE: JiWire

SOURCES: "Mobile Ad Awareness," June 2011, Greystripe, Kevin Granath, VP Sales, 333 Bryant St., #LL120, San Francisco, CA 94107; 415-651-2650; sales@greystripe.com; www.greystripe.com. Price: Available online at no charge.

"JiWire Mobile Audience Insights Report, Q1 2011," David Staas, SVP Marketing, 150 Post St., #500, San Francisco, CA 94108; 415-821-8600; insights@jiwire.com; www.jiwire.com. Price: Available online at no charge.

"Retrevo Pulse Report," October 2011, Retrevo, Paule Kaye, VP Sales & Business Development, 440 N. Wolfe Rd., Sunnyvale, CA 94085; 855-738-7386; paul@retrevo.com; www.retrevo.com. Price: Selected data available online at no charge; contact for additional information.

"Mobile Survey," September 2011, Prosper Mobile Insights, Chrissy Wissinger, Communications, 400 W. Wilson Bridge, #200, Worthington, OH 43085; 614-846-0146; info@prospermobile.com; www.prospermobile.com. Price: Available online at no charge.

"comScore MobiLens," August 2011, comScore, Mark Donovan, SVP Mobile, 11950 Democracy Dr., #600, Reston, VA 20190; 703-438-2000; www.comscore.com. Price: Selected data available online at no charge; contact for additional information.

'Freemium' Apps: For Games, Small Segment Of Big Spenders Drives In-App Purchasing

Only 3% of consumers spend money for virtual goods within so-called "freemium" game apps, according to mobile app research house Flurry. Yet a small segment of freemium iOS and Android game app users are spending big bucks on in-game purchases, validating the business model.

Not only is the rise of in-app purchases changing how game developers design their apps and plan for profitability; it also is changing the marketing calculus for app retailers such as Amazon, which is aggressively pitching developers on "free app of the day" promotions for its Appstore. (See related stories, pages 3 and 5.)

Among iOS and Android "freemium" gamers who make in-game purchases, 71% spend less than $10 per transaction, Flurry says. But even within this "under $10" group, most in-game
purchases hover around $9.99, followed by $4.99; fewer than 2% of the transactions in this group are 99 cents or less.

What's more, the average in-game purchase is valued at $14. Flurry attributes the average to the 13% of freemium gamers who spend more than $20 per in-game transaction: in fact, 5% of all purchases are for amounts greater than $50.

While the over-$50 spending segment is small, it represents 30% of the overall market for freemium in-game goods.

By the end of 2011, Flurry forecasts that the total U.S. market for iOS and Android game apps — including paid apps as well as freemium titles — will surpass $1 billion.

SOURCE: Flurry Analytics, Jeferson Valadares, GM Games, 282 2nd St., #202, San Francisco, CA 94105; www.flurry.com.

Virtual Goods: What Exactly Are 'Freemium' Game Players Buying?

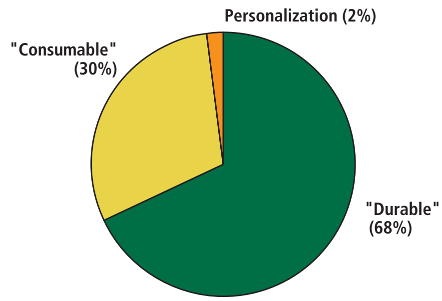
A small segment of "freemium" iOS and Android game app users are spending real money on in-game purchases: the average in-game purchase is valued at $14, according to mobile market research firm Flurry (EML, Aug. 15, 2011, p. 1). But what types of virtual goods are these game players buying?

Flurry divides virtual in-game items into two main product categories: "durable" and "consumable." In freemium games, durable goods provide a permanent game play benefit: e.g., virtual armor to protect a character in a role-playing game. Consumable virtual goods, in contrast, can be depleted when gamers use them: e.g., hand grenades in a war game, or fertilizer for virtual crops in a farm simulation.

Virtual consumables account for more than two thirds (68%) of all in-game purchase transactions, while virtual durable goods account for 30%, Flurry says. A third category — "personalization" items for avatars that, while durable, provide no game play benefits — commands a small share of in-game purchases (2%).

As a percentage of total dollars spent, the market is evenly split between virtual consumables and durable goods, Flurry finds. The most popular virtual purchase, consumable or otherwise, is for "premium" virtual currency, which game players can spend in a variety of ways to accelerate

PURCHASE TRANSACTIONS FOR VIRTUAL GOODS WITHIN IOS AND ANDROID "FREEMIUM" GAMES



SOURCE: Flurry Analytics

progress in a game. With premium currency, game players often can purchase exclusive virtual items that allow them to advance through a game even faster.

SOURCE: Flurry Analytics, Jeferson Valadares, GM Games, 282 2nd St., #202, San Francisco, CA 94105; www.flurry.com.

Shoppers Seek Out Mobile Coupons While In Retail Stores

More than half of smartphone owners have looked for mobile coupons while shopping in stores (55%) or used coupons that they already had on their phones (56%), according to Insight Express research cited in *How Mobile Devices Are Changing The Way Americans Shop*, a new report from the publishers of Research Alert.

More than a third say they always (13%) or almost always (22%) look for mobile coupons in-store. Similar proportions always (9%) or almost always (26%) use mobile coupons they've already obtained. Half of mobile owners have made a special trip to a store after receiving a mobile coupon. Grocery stores are the most popular places to use mobile coupons.

One in five mobile Internet users (20%) use or request coupons on their phones while shopping in stores or at the mall, according to Yahoo/Nielsen research cited.

Text Message Coupons Are Preferred

Mobile shoppers are more receptive to receiving coupons via text messages than through any other channel. More than half of smartphone owners (54%) have received text messages with special offers, according to Prosper Mobile Insights research cited. A quarter of mobile phone owners cite text messaging as their preferred way to receive coupons, according to Insight Express.

More than a quarter of smartphone owners have used coupons they received in text messages (28%), have downloaded coupons to print later (26%), or have shown sales clerks email coupons on their phones (26%). Just under a quarter (23%) have used coupons they found in mobile apps.

SOURCES: "How Mobile Devices Are Changing The Way Americans Shop: Research On Behavior, Attitudes, And Marketing Preferences," September 2011, EPM Communications, Ira Mayer, President/Publisher, 19 W. 21st St., #303, New York, NY 10010; 212-941-0099; info@epmcom.com; www.epmcom.com. Price: $750 ($650 for subscribers to Research Alert).

"InsightExpress' Mobile Consumer Research," March 2011, InsightExpress, Joy Liuzzo, Senior Director, Mobile Research, 333 Ludlow St., South Tower, 2nd Fl., Stamford, CT 06902; 203-359-4174; support@insightexpress.com; www.insightexpress.com. Price: Contact for information.

"The Mobile Shopping Framework Study: The Role of Mobile Devices in the Shopping Process," January 2011, Nielsen/Yahoo, Nielsen, Elizabeth Luke, Communications Analyst, Mobile, 700 Broadway, New York, NY 10003; phone: 646-654-5000; elizabeth.luke@nielsen.com; www.nielsen.com. Price: Contact for information.

"Smartphone Survey," May 2011, Prosper Mobile Insights, Phil Rist, EVP Strategic Initiatives, 450 W. Wilson Bridge Rd., #370, Worthington, OH 43085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Contact for information.

More Than 60 Apps Downloaded Per Apple Device

Total app downloads from Apple's App Store have not yet overtaken cumulative digital music sales at iTunes, as research firm Asymco expected they would by the end of 2010. But Asymco asserts that app downloads, which passed the 10-billion mark in January, will surpass iTunes track sales by the end of March 2011.

The total-apps figure already represents an attach rate of more than 60 apps for every iPhone, iPad, or iPod Touch sold, the firm estimates. Asymco does not take into account users who have replaced an old iPhone or iPod Touch with a new model; this factor likely drives the actual app attach rate even higher.

Also among the unknowns: the balance between free and paid content, something that has not been much of a factor with the iTunes music store. (See related story, next page.)

SOURCE: Asymco, Rami Salle, Business Development, rami.salle@asymco.com; www.asymco.com.

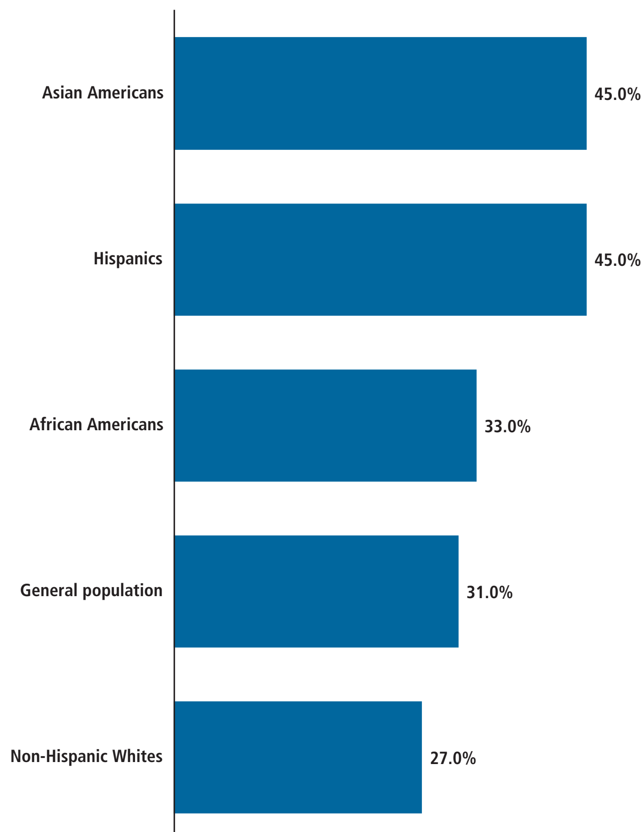
Emerging Majorities Big On Smartphones

Black, Hispanic, and Asian Americans are more likely than members of the general U.S. population to own smartphones, according to Nielsen.

Among smartphone owners, Asian Americans tend to prefer iPhones, while African Americans favor Blackberry devices, and Hispanics are nearly equally split among Android, Blackberry, and iPhone operating systems.

Of consumers who have purchased mobile phones in the past six months, 60% of Asians, 56% of Hispanics, and 44% of Blacks bought smartphones, compared to 42% of non-Hispanic Whites.

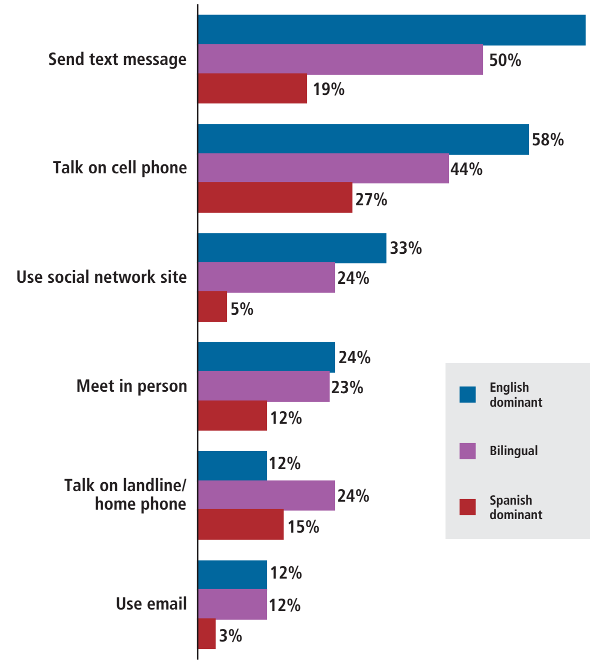
MOBILE PHONE OWNERS WHO HAVE SMARTPHONES, BY RACE/ETHNICITY, DECEMBER 2010



SOURCE: Nielsen

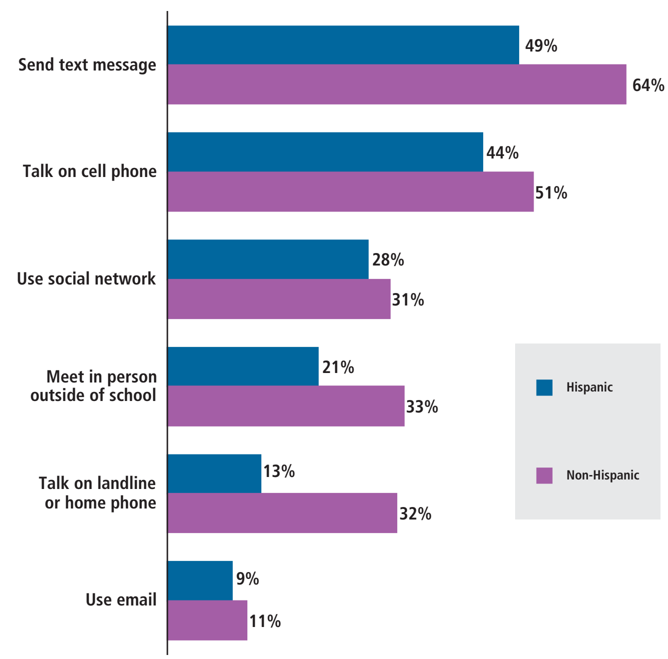
SOURCE: The Nielsen Co., Elizabeth Luke, Communications Analyst, Mobile, 770 Broadway, New York, NY 10003; 800-864-1224; Elizabeth.luke@nielsen.com; www.nielsen.com. Price: Contact for information.

HOW TEEN, YOUNG ADULT HISPANICS COMMUNICATE DAILY, BY PRIMARY LANGUAGE



SOURCE: Pew Hispanic Center

HOW 16-17-YEAR-OLDS COMMUNICATE, HISPANIC VS. NON-HISPANIC



SOURCE: Pew Hispanic Center

Young Hispanics Prefer To Text, Call Via Mobile To Connect With Friends

Teen and young adult Hispanics 16-25 primarily text message to communicate with their friends daily (50%), followed by using a cell phone (45%) and through social networking sites (23%), according to the Pew Hispanic Center. Email is the least common form of daily communication among young Hispanics.

English-dominant Hispanics are more likely than bilingual or Spanish-dominant Hispanics to use mobile and Internet technology to connect with friends. Nearly seven in 10 English-dominant Hispanics (68%), for instance, text daily, compared to 50% of bilingual Hispanics and 19% Spanish-dominant Hispanics.

While there aren't many significant gender differences so far as how they communicate with friends, there are variations between U.S.-born and immigrant Hispanics. U.S.-born Hispanics are nearly three times as likely as their foreign born peers to socialize with their friends through a social networking site (31% vs. 10%) and are more likely to catch up with friends in person (24% vs. 16%).

SOURCE: "The Latino Digital Divide: The Native-Born Versus The Foreign-Born," "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.

Smartphones Are Becoming The All-In-One Device Of Choice

Americans are migrating toward bundling organizational, communication, entertainment, and information functions into one device — increasingly the smartphone or tablet. In some cases, these devices have made others obsolete, but they're not yet replacing computers. The demographics of early adopters for a truly all-in-one device may surprise marketers.

Smartphones accounted for the majority (55%) of new mobile phone purchases as of May 2011, up from just over a third (34%) in May 2010, according to Nielsen. Almost four in 10 (38%) mobile phone users own smartphones. Smartphone owners favor devices that use the Android operating system — 38% of smartphone owners have Android phones.

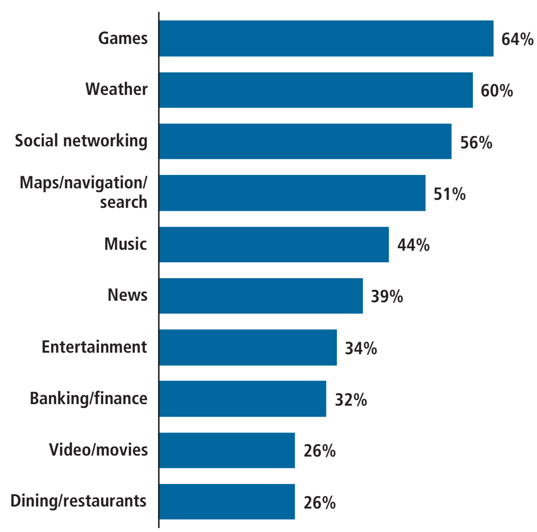
Pew finds that 35% of all American adults own smartphones; of the 83% of adults who own mobile phones, 42% own smartphones. Low-income smartphone owners are more likely than those with higher incomes to access the Internet primarily from their phones — 40% of those with household incomes of less than $30,000, vs. 29% of those with incomes of $30,000-$49,999 and 17% of those with incomes of $50,000 or more, do so.

Four in 10 owners of smartphones and/or tablets (44%) say these are their devices of choice for accessing the Internet, according to Prosper Mobile Insights, while Pew finds that 25% of smartphone owners access the Internet primarily from their phones.

Although than a quarter (24%) say smartphones or tablets have replaced their computers, more than half say they've replaced GPS units (52%) or alarm clocks (61%), and more than four in 10 say they've replaced digital cameras (44%), personal organizers (42%), and landline phones (40%), according to Prosper.

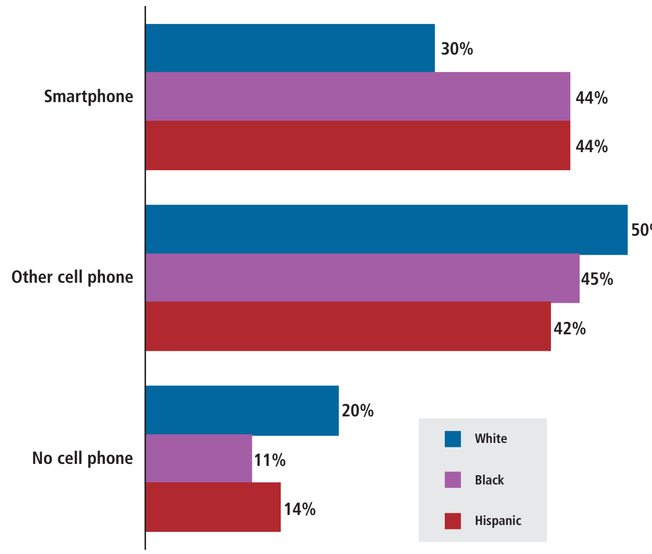
Almost six in 10 smartphone or tablet owners (58%) are somewhat (24%) or very (34%) comfortable using their devices to pay for transactions at retail checkouts.

MOST FREQUENTLY USED SMARTPHONE APPS



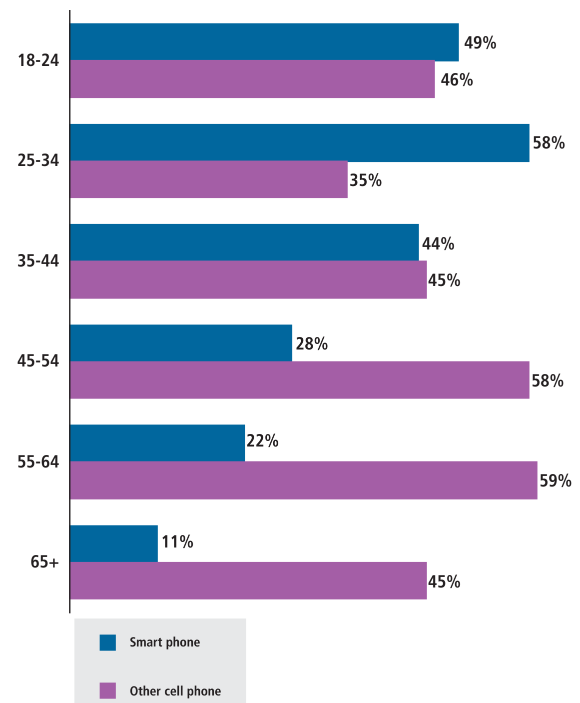
SOURCE: Nielsen

OWNERSHIP OF SMARTPHONES AND CELL PHONES, BY RACE/ETHNICITY



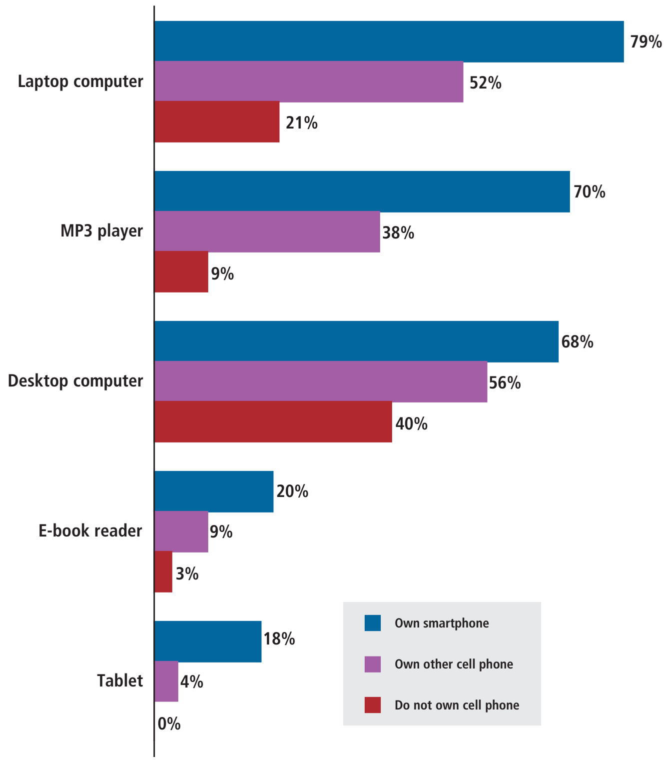
SOURCE: Pew Internet and American Life Project

OWNERSHIP OF SMARTPHONES VS. STANDARD CELL PHONES, BY AGE



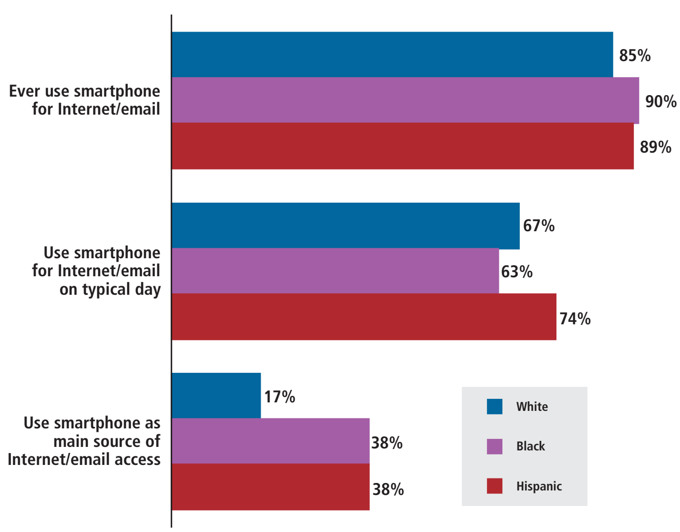
SOURCE: Pew Internet and American Life Project

OWNERSHIP OF COMPUTERS AND ELECTRONICS, BY OWNERSHIP OF SMARTPHONE/CELL PHONE



SOURCE: Prosper Mobile Insights

USE OF SMARTPHONES TO ACCESS INTERNET, BY RAC/ETHNICITY



SOURCE: Pew Internet and American Life Project

SOURCES: "In U.S., Smartphones Now Majority of New Cell Phone Purchases," June 30, 2011, and "Play Before Work: Games Most Popular Mobile App Category in U.S.," July 6, 2011, Nielsen, Elizabeth Luke, Communications Analyst, Mobile, 770 Broadway, New York, NY 10003; 646-654-5000; elizabeth.luke@nielsen.com; www.nielsen.com. Price: Available online at no charge.

"35% of American Adults Own A Smartphone," July 11, 2011, Pew Internet & American Life Project, Pew Research Center, Aaron Smith, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; info@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

"Prosper Mobile Insights June 2011 Mobile Survey," Prosper Mobile Insights, Kim Rayburn, SVP Client Solutions and Marketing, 450 West Wilson Bridge Rd., #370, Worthington, OH 43085; 614-846-0146; kim@bigresearch.com; www.biginsight.com. Price: Contact for information.

Americans Are Tethered To Their Cell Phones

One in three adults (30%) feel anxious when their cell phone is not within arm's reach, according to ReCellular. It may be for this reason that most even bring their phones into the bathroom (53%).

Cell phones have obviously changed peoples' behavior — 87% now only know a few phone numbers by heart and wouldn't know how to reach loved ones if they lost their phones. More than a quarter (28%) admits to spending more time texting or reading messages than they do face-to-face with friends or family.

Those aged 18-34, having come of age with mobile technology, are more likely than average to sleep with their cell phones (40%) and text at the dinner table (33%). Some 17% of 25-34 year olds would even rather lose their car keys than their cell phones.

SOURCE: "Cell Phone Behavior," ReCellular, Chuck Newman, CEO, 2300 Traverwood Dr., Ann Arbor, MI 48105; 734-205-2200; cnewman@recellular.com; www.recellular.com.

Snapshot Of Americans' Cell Phone Usage: Voice, Texting, And Web

There are 228 million American cell phone users, according to Nielsen Company. More than a third of those (36% or 83.2 million) go online from their mobile phones.

Just under a third (31%) have smartphones. The average smartphone user has 27 apps downloaded to his or her device.

Women spend 818 minutes a month using their phones for voice calls and send and receive an average of 716 text messages. Men spend an average of 640 minutes a month on

TEXT MESSAGES SENT AND RECEIVED PER MONTH, BY AGE, 2010

9-12	1,178
13-17	3,705
18-24	1,707
25-34	758
35-44	585
45-54	379
55-64	126
65 and older	41

SOURCE: Nielsen Company

voice calls and send and receive an average of 555 text messages. Teens are by far the most prolific texters, with 13-17 year olds sending and receiving more than double the number of text messages as other age groups.

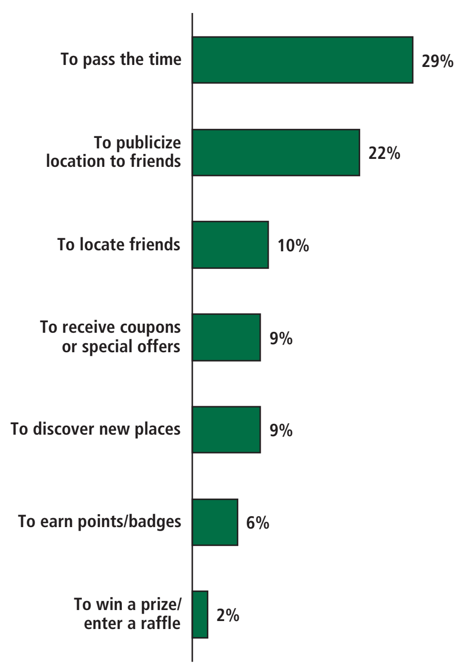
SOURCE: "Media Universe," Nielsen Company, Susan Whiting, Vice Chair, 770 Broadway, New York, NY 10003; 646-654-8499; susan.whiting@nielsenmedia.com; www.nielsen.com. Price: Call for information.

Mobile Consumers Slow To Respond To Location-Based Marketing Efforts

Despite the popularity of location-based services among smartphone users, location-based advertising and promotions have yet to catch on, according to Lightspeed Research.

More than one third of respondents on Lightspeed's mobile consumer panel (37%) have checked in using a location-based application during the past six months — with the percentage jumping to 54% among 18-24-year-old males. Among those who do, more than half (52%) check in with Facebook Places, while 18% use Foursquare and 12% use Google Latitude. Three in 10 location app users (31%) check in at least once a day, with 21% checking in several times per day. The most popular locations for people to check into through location-based apps are home (52%), a restaurant (50%), a store (40%) and work (39%).

PRIMARY REASONS THAT MOBILE CONSUMERS USE LOCATION-BASED APPS



NOTE: Base is among those who have used a location-based app in the last six months.

SOURCE: Lightspeed Research

Most users of location-based apps are motivated to do so by social concerns: 29% use them to pass time, 22% want to publicize their locations to friends, and 10% want to locate their friends. Only 9% use location-based services to get coupons or special offers. Moreover, only 2% use them to win prizes or enter raffles.

The majority of mobile consumers (56%) have not responded to any location-based promotions in the past six months.

Lightspeed conducted its survey in November, 2010, attracting some 4,700 respondents.

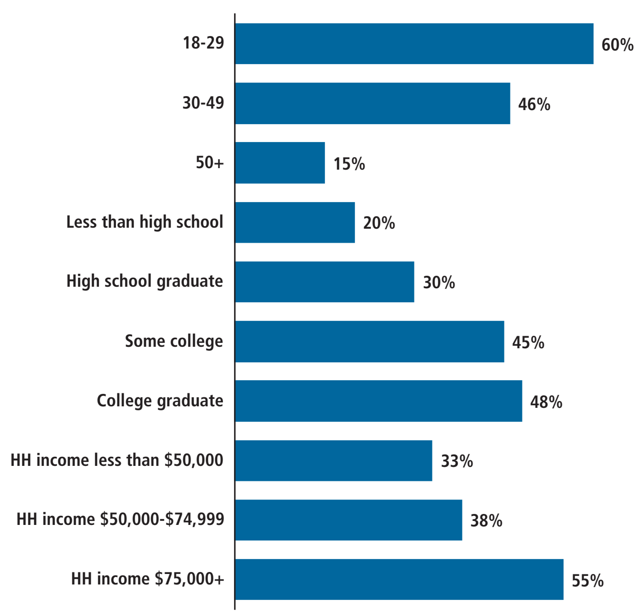
SOURCE: Lightspeed Research, Naor Chazan, Marketing Director Americas, 3 Mountain View Rd., 3rd Fl., Warren, NJ 07059; 908-630-3443; www.lightspeedresearch.com.

Eight In 10 Adults Have Mobile Phones

More than eight in 10 U.S. adults (84%) have cell phones, as of August 2011, according to the Pew Internet and American Life Project. Of these, 38% have downloaded at least one app to their phones, and 43% say their phones came preloaded with apps. Half of cell phone owners (50%) have apps on their phones (downloaded or preloaded), up from 43% in May 2010.

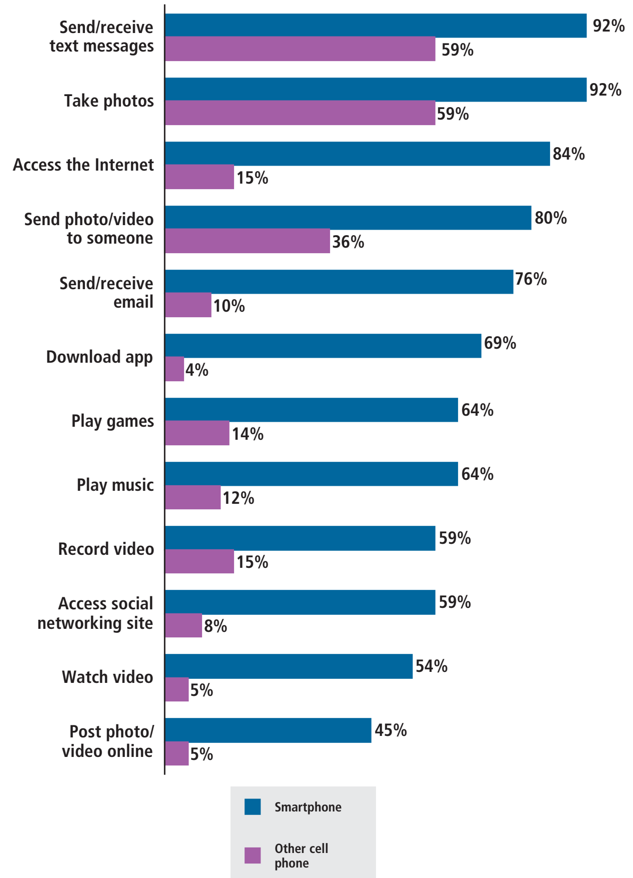
Adults under age 30 are most likely to download apps to their phones, while those age 50 and older are least likely. One in 10 U.S. adults own tablets, and of these, 75% download apps to their tablets. More than eight in 10 tablet own-

ADULTS WHO HAVE DOWNLOADED APPS TO CELL PHONES, BY AGE, EDUCATION, AND INCOME
(% of each group who have downloaded apps)



SOURCE: Pew Internet and American Life Project

HOW AMERICANS USE THEIR MOBILE PHONES, SMARTPHONES VS. OTHER CELL PHONES



SOURCE: Pew Internet and American Life Project

ers (82%) who have downloaded tablet apps have also downloaded apps to cell phones.

More than four in 10 U.S. mobile phone owners (43%) have smartphones as of the third quarter of 2011, according to Nielsen. Among mobile users ages 25-34, 62% have smartphones.

Smartphone owners are more likely than owners of traditional cell phones to use their devices for a wide range of activities — even those that don't require use of the Internet, such as taking photos, sending text messages, playing games, and listening to music, according to Pew.

U.S. mobile owners spend an average of 81 minutes per day using mobile apps, compared to 74 minutes per day using the Internet accessed by either mobile or desktop, as of June 2011, according to Flurry Analytics (analyzing comScore and Alexa Internet use data along with Flurry's own data on app use). This is the first time that mobile app use has outstripped Internet use. By comparison, in June 2010, web use was 64 minutes per day, and mobile app use was 43 minutes.

SOURCES: "Half of Adult Cell Phones Owners Have Apps On Their Phones," November 2, 2011, and "Americans and Their Cell Phones," August 15, 2011, Pew Internet and American Life Project, Kristen Purcell, Associate Director for Research, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; info@pewinternet.org; www.pewinternet.org.

"Generation App," November 3, 2011, Nielsen, Matthew Hurst, Communications Analyst, Online, 770 Broadway, New York, NY 10003; 646-654-5000; matthew.hurst@nielsen.com; www.nielsen.com

"Mobile Apps Put the Web in Their Rear-View Mirror," June 20, 2011, Flurry Analytics, Peter Farago, VP Marketing, 282 2nd St., #202, San Francisco, CA 94105; 415-348-1445; www.flurry.com.

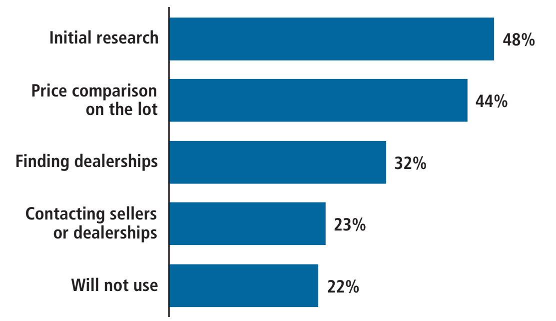
Smartphones Are Car Shopping Tools

Nearly eight in 10 smartphone owners (78%) who plan to buy a new car in the next year expect to use their mobiles as part of the buying process, according to Greystripe. More than a quarter of those who own smartphones with touch screens (26%) expect to be shopping for cars in the next year, and another 24% plan to buy within the next three years.

Of those who plan to buy in the next year, 31% say they'll definitely be buying new cars, and another 29% may buy new cars. Four in 10 plan to buy used cars.

Of those shopping for new cars in the coming year, more than half (55%) are considering both American and foreign models. Owners of touch-screen smartphones are nearly three times more likely than members of the overall population to be planning to buy a new car in the next year.

HOW SMARTPHONE OWNERS WILL USE THEIR PHONES TO SHOP FOR NEW CARS



NOTE: Multiple responses allowed. Sample is smartphone owners who plan to buy a new car in the next year.

SOURCE: Greystripe

SOURCE: "Mobile Auto Insights, April 2011," Greystripe, Kevin Granath, VP of Sales, 333 Bryant St., #LL120, San Francisco, CA 94107; 415-651-2650; sales@greystripe.com; www.greystripe.com. Price: Available online at no charge.

Tablet Ownership Is Small But Growing Fast

Although only 10% of online adults currently own computer tablets (such as iPads), 17% of those who don't currently own tablets plan to buy them in 2011, according to Zoomerang. Nine in 10 tablet owners (90%) say they'd recommend them to friends, family members, or colleagues. The top uses for tablets are Internet browsing and email, though the most-widely downloaded tablet apps are leisure and entertainment-oriented: games, sports, music, reading, and general entertainment.

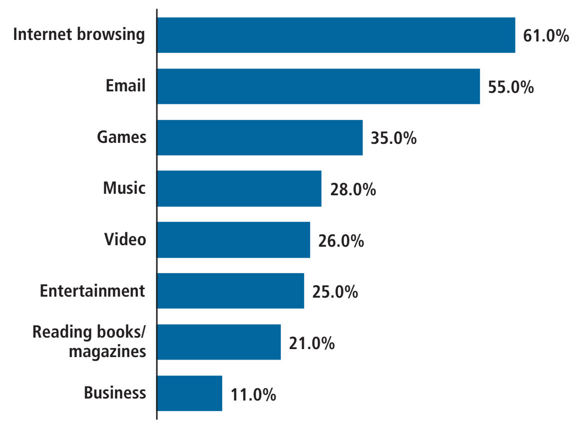
More than half of tablet owners (51%) say use of their primary computer(s) hasn't been affected by owning a tablet, and 28% say they use their computers more frequently than they did before.

The most important factors in choosing what type of tablet to buy include price (56%), type of connectivity (wi-fi, 3G, 4G — 46%), operating system (44%), and features (41%).

Among those who don't plan to buy a tablet in 2011, 21% cite price as the chief reason, but 53% say they simply don't need or want one.

SOURCE: "The Tablet Revolution of 2011," Zoomerang, Alex Terry, GM, 150 Spear St., #600, San Fracisco, CA 94105; 415-957-2200; sales@zoomerang.com; www.zoomerang.com

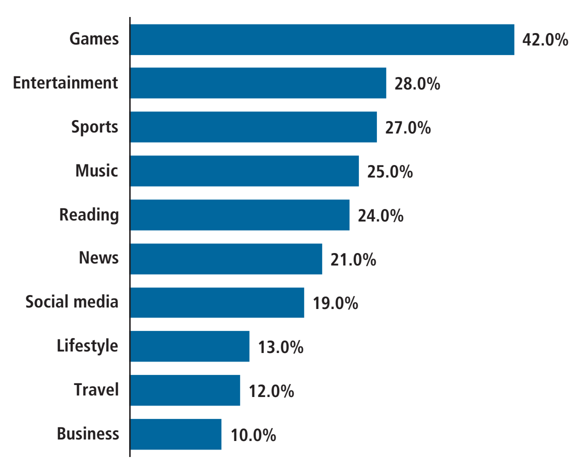
HOW AMERICANS USE THEIR COMPUTER TABLETS



NOTE: Respondents were asked to choose their top three uses.

SOURCE: Zoomerang

TOP 10 TYPES OF APPS USERS HAVE DOWNLOADED FOR THEIR TABLETS



SOURCE: Zoomerang

iPad Continues To Dominate Among Tablets

Apple's iPad continues to dominate the tablet computer market, commanding an 82% share between its 3G/Wi-Fi and Wi-Fi-only models, according to first-quarter 2011 research from Nielsen.

Tablets that employ the rival Android operating system have not been in the market for as long as Apple's iPad, which debuted in the U.S. in April 2010. The Android tablets also carry a range of features; some are cheaper than the iPad, while others are more expensive. Dell launched a 5-inch version of its budget-priced Streak tablet in the U.S. in August 2010, and began offering a 7-inch version in February 2011. Samsung debuted a 3G version of its 7-inch Galaxy Tab last November; a Wi-Fi-only version just began hitting shelves in April 2011. Motorola's 10.1-inch, high-end Xoom tablet arrived in February 2011, while a Wi-Fi-only version debuted in March.

During the first quarter, the Samsung Galaxy Tab proved to be the most popular iPad competitor, garnering a 4% share of the overall market.

Among Nielsen's other findings on the tablet market:

- Nearly half of all tablet owners (49%) report being the only ones in their household using their particular tablet; 51% share their device with others in the household.
- When asked whether they used other connected devices more often or less often since purchasing a tablet, 27% of those who also own e-Readers said they use their e-Reader less often or not at all – the same percentage as those who also own portable media players. One in four tablet owners who also own a portable games console (25%) are using those devices less often, if at all, since purchasing a tablet.

SOURCE: Nielsen, Matthew Hurst, Communications Analyst, 770 Broadway, New York, NY 10003; 646-654-5000; matthew.hurst@nielsen.com; www.nielsen.com.

'Free' Content Trumps 'Paid' Among iPad Users

More than three quarters of iPad owners (76%) use their iPads at least five days a week, while 55% of owners use the device every day, according to Knowledge Networks. But these users are largely bringing a "free Internet" mindset to the iPad, with only a small portion of users willing to pay for content.

In the research firm's survey of 205 iPad owners and users, the early adopter group preferred an ad-supported model for content access over a pay model by nearly a 6-to-1 ratio. Additionally, six of the seven top reported iPad activities are familiar ones such as web surfing and email.

Some 70% of iPad users have read an e-book on the device, while 61% have read an electronic magazine or journal, and 51% have watched network TV programs. Yet only 13% of iPad users would be willing to pay extra for an iPad-friendly version of a print magazine or TV show that they already pay for in its conventional format (i.e., a magazine or pay-TV subscription).

Users who watch TV episodes or movies on their iPads most often learn about the content from branded apps created by services such as Netflix, SlingBox, or YouTube. Word-of-mouth comes in second in the Knowledge Networks survey, ahead of TV networks' own apps and Apple's iTunes store.

CONTENT THAT IPAD USERS HAVE CONSUMED ON THEIR DEVICES, 2010

E-books	70%
Electronic magazines or journals	61%
Network TV programs	51%
Paid-for content (all types)	13%

SOURCE: Knowledge Networks

SOURCE: Knowledge Networks, David Tice, VP/Group Account Director, 570 South Ave. E., Cranford, NJ 07016; 908-497-8075; dtice@knowledgenetworks.com; www.knowledgenetworks.com.

iPad Users Listening To Music, Playing Casual Games

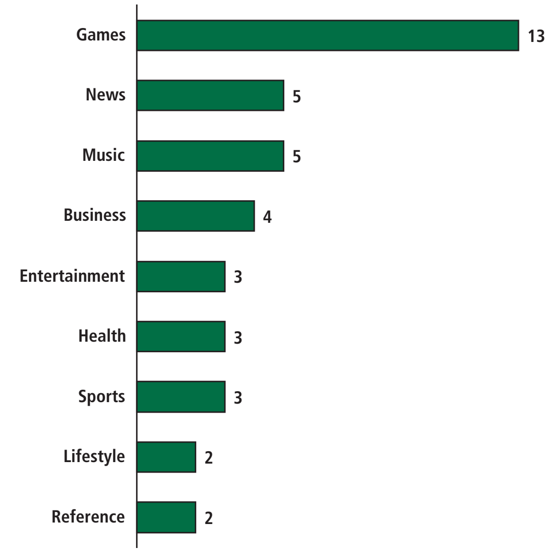
Among iPad owners, music apps are second only to news in terms of the time users spend with them, according to mobile app analytics company Localytics.

The research firm compares the average time an iPad user spends between opening a particular app and closing it with the average time across all app categories. Users keep music apps open more than two times (228%) as long as the average app; this could be explained by users keeping streaming radio apps such as Pandora open and playing music through a stereo while they do other activities. In comparison, users keep game apps and general entertainment apps open for less time than the average session length across all genres.

Indeed, iPad users appear to be playing short, more casual game apps, rather than more in-depth, time consuming titles. Yet game apps are most popular among iPad users in terms of the number of sessions they open per month — roughly 13, compared to five times a month for music apps and three times a month for general entertainment apps.

AVERAGE IPAD APP SESSIONS PER MONTH, BY GENRE

Among All iPad Users, August 2011



SOURCE: Localytics

SOURCES: Localytics, Daniel Ruby, Director Online Marketing, 1 Cambridge Ctr., 6th Fl., Cambridge, MA 02142; 617 418 4422; www. localytics.com.

Among Tablet Owners, Time With Devices Supplanting Time With TV

More than one third of tablet computer owners (34%) already spend more time each day using their devices than they do watching TV, according to Google's AdMob. The survey of some 1,400 tablet users reveals game playing to be the most common tablet activity, at 84% of respondents; more than half (51%) consume entertainment such as music or videos on their devices.

Among other findings on the nature of tablet use: 68% of tablet users spend at least 1 hour a day on their tablet, and 82% primarily use their tablet at home.

SOURCE: AdMob, Jason Spero, VP/Managing Director, North America, 60 E. 3rd Ave., #225, San Mateo, CA 94401; 650-931-3940; www.admob.com.

Tablets Used For TV And Movies

Half of tablet owners (50%) watch both TV shows and movies on their devices, according to In-Stat. Among 18-24-year-olds who own smartphones and/or tablets, half discuss TV shows on social networks.

SOURCE: In-Stat, Rick Vogelei, Marketing Manager, 14646 N. Kierland Blvd., #100, Scottsdale, AZ 85254; 480-483-4476; rvogelei@in-stat.com; www.in-stat.com. Price: Contact for information.

Smartphones And Tablets Are Part Of Users' Lives — And They're Changing The Way They Use The Internet

Smartphones are becoming increasingly integrated into their owners' lives: 35% use non-voice applications on their devices before they get out of bed in the morning, according to mobile phone manufacturer Ericsson.

The most common activity performed before getting up is checking Facebook (18%), and it's also an important early-morning activity for smartphone owners once they're out of bed (22%). About a quarter of smartphone owners check email on their phones (24%) and access the Internet via their phones' browsers (23%) soon after getting up.

About three in 10 (29%) use Google Maps during their morning commutes, and 28% listen to music on their phones.

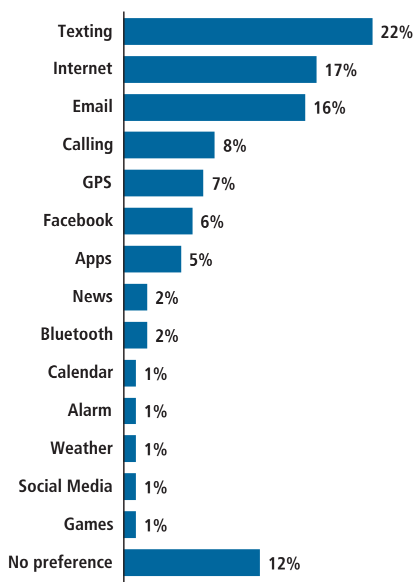
The most active times of day for non-voice smartphone use are early and late evening, but more than half of owners use their devices steadily throughout the day, with a significant dip in use during dinner.

Although half (51%) of smartphone owners use their phones while lying in bed, tablets (57%) and e-book readers (61%) are even more widely used in bed, according to Nielsen. Owners of e-readers spend 37% of their total time using the devices while lying in bed, while tablet owners spend 21% of their tablet time in bed; smartphone owners spend 11% of their smartphone time in bed.

Watching television is the activity most likely to be combined with tablet and smartphone use — making up 30% and 20% of total device usage time, respectively. Not surprisingly, smartphones are the devices considered most valuable as shopping companions or to pass the time while waiting.

Smartphones are increasingly integrated into shopping behaviors such as researching products, reading reviews, and finding stores, according to Prosper Mobile Insights. Half of owners have made purchases on their phones.

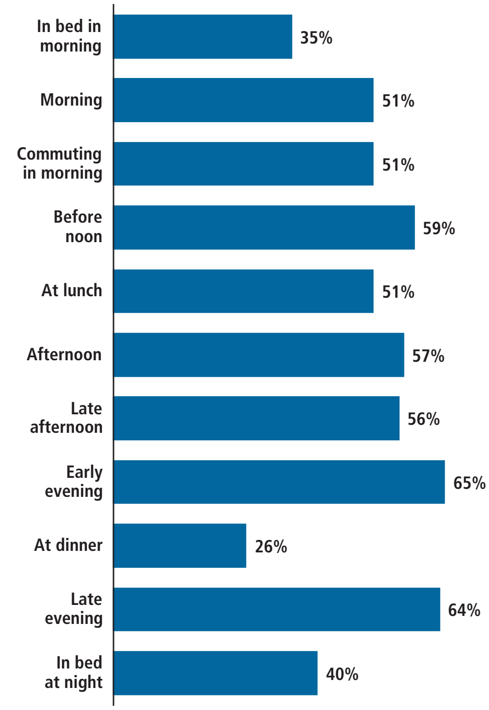
SMARTPHONE FUNCTIONS OWNERS "CAN'T LIVE WITHOUT"



NOTE: Respondents were asked to choose one.

SOURCE: Prosper Mobile Insights

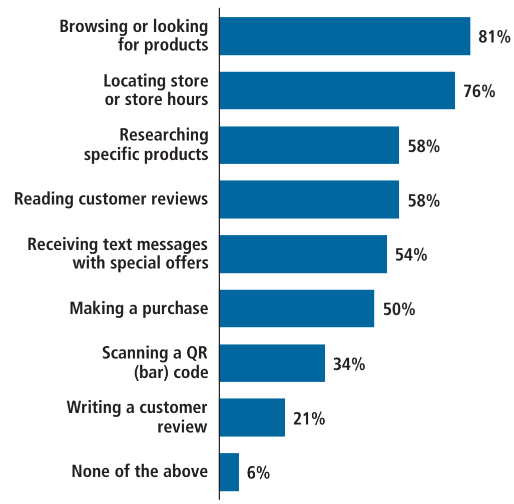
TIMES OF DAY U.S. CONSUMERS USE SMARTPHONES, 2011



NOTE: Multiple responses permitted.

SOURCE: Ericsson

HOW SMARTPHONE OWNERS USE THEIR PHONES TO SHOP
(% who have ever used function)



SOURCE: Prosper Mobile Insights

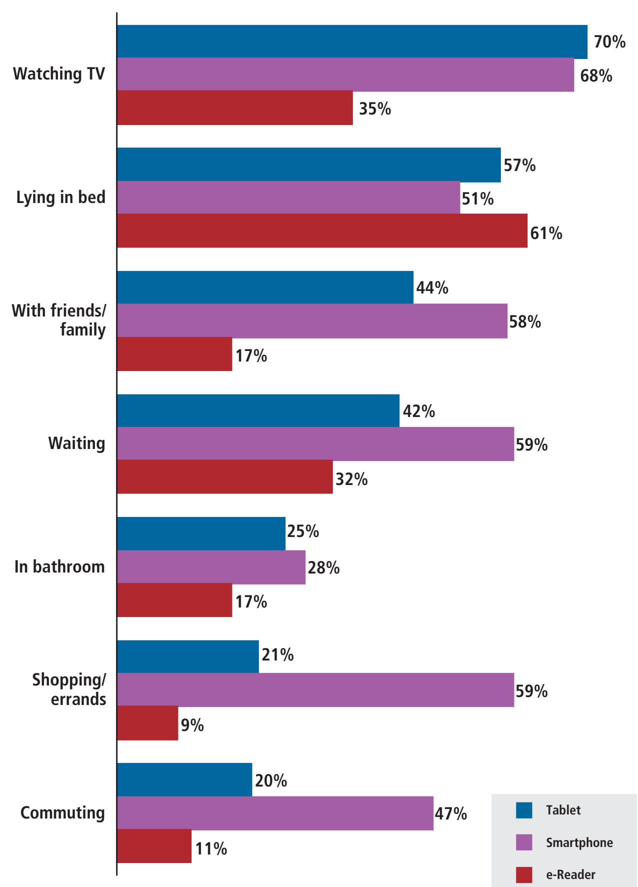
The majority of smartphone owners take full advantage of their devices' capabilities. More than eight in 10 use at least some of their phones' applications (such as weather and social media), and 53% agree with the statement, "I use my smartphone for all of the functions…it's my life."

More than half of smartphone owners (56%) prefer to access the Internet on their phones rather than using computers.

Smartphones have changed the way people use the Internet, according to Ericsson. Prior to their introduction, consumers used the Internet in discrete chunks of time — whether at work, at home, or in Wi-fi hotspots. Adoption of smartphones has enabled people to be online whenever the need or whim strikes, and the result is a more fluid engagement with the medium. Apps make the process more intuitive and immediate than using a browser, which means that consumers interact with online content so seamlessly that it barely registers as being online. There are also indications that users of smartphones and tablets focus more on the app than the device — content and connection matter more than the screen used to get there.

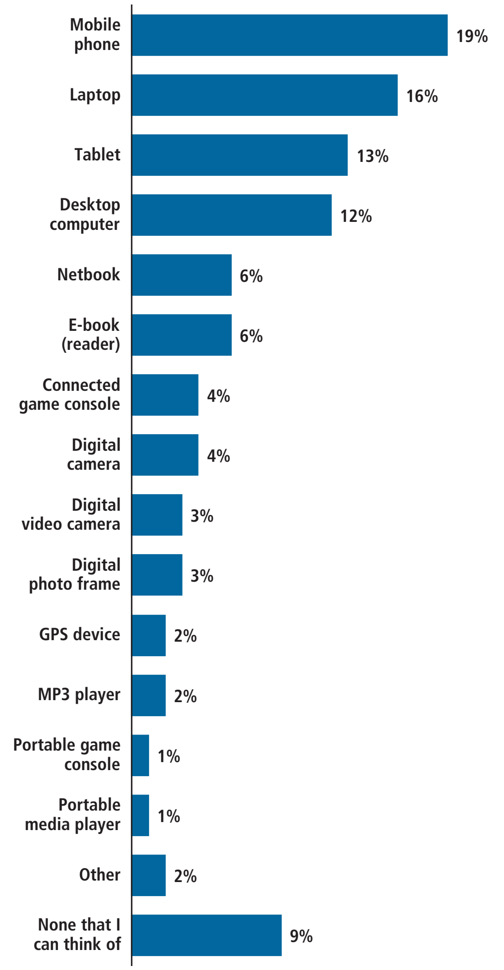
ACTIVITIES MOST LIKELY TO BE COMBINED WITH TABLET, SMARTPHONE, OR E-READER USE

(% who use the device during each activity)



SOURCE: Nielsen

ELECTRONIC DEVICES U.S. CONSUMERS PLAN TO BUY NEXT



NOTE: Respondents were asked to choose one device.

SOURCE: Ericsson

There is, however, a distinction between the physical experience of using tablets and smartphones versus laptops. The open-screen format of smartphones and tablets makes these devices seem more accessible than laptops and encourages frequent, nearly continuous use.

When it comes to devices that consumers plan to buy soon, tablets are already more popular than desktop computers, and are gaining ground on laptops.

SOURCES: "From Apps to Everyday Situations," Ericsson ConsumerLab, Mikael Eriksson Bjorling, Consumer Behavior Expert, SE-164 80 Stockholm, Sweden; 011-46-10-719-0000; asq.us@ericsson.com; www.ericsson.com. Price: Available online at no charge.

"Q1 2011 Mobile Connected Device Report," Nielsen, Elizabeth Luke, Communications Analyst, Mobile, 700 Broadway, New York, NY 10003; phone: 646-654-5000; elizabeth.luke@nielsen.com; www.nielsen.com. Price: Selected data available online at no charge.

"Smartphone Survey, May 2011," Prosper Mobile Insights, Phil Rist, EVP Strategic Initiatives, 450 W. Wilson Bridge Rd., #370, Worthington, OH 43085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Available online with registration.

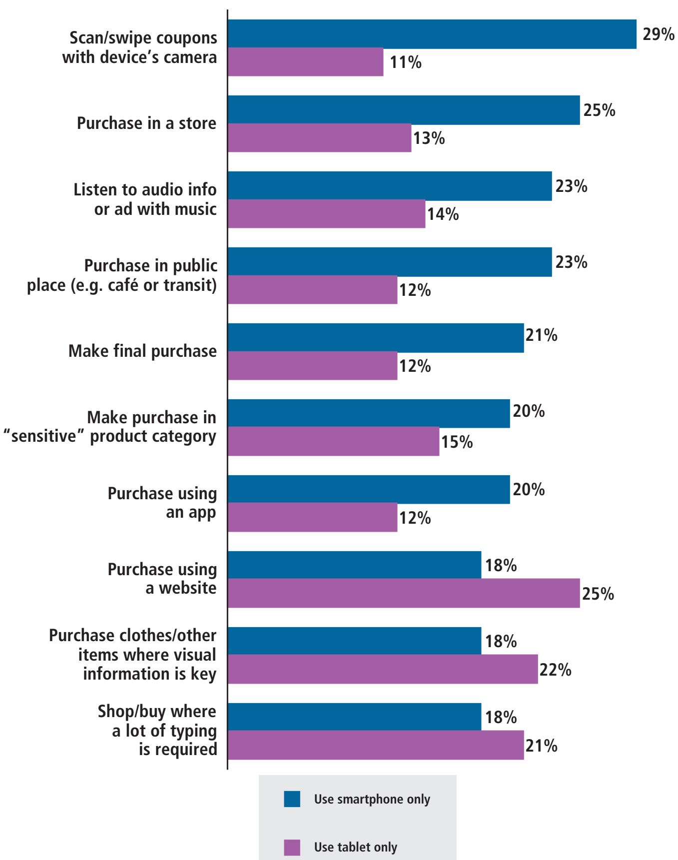
Owning Both Tablet And Smartphone Leads To More Mobile Shopping

Consumers who own both smartphones and tablets do more mobile shopping than those who own only smartphones, finds Ipsos OTX MediaCT. Owners of both devices bought an average of 18.3 items via mobile in the past year, compared to 10.4 items bought by those who own only smartphones.

More than six in 10 "dual device" owners say they may have (35%) or are sure they have (28%) spent more than they otherwise would because of mobile shopping — compared to 13% of smartphone-only owners who are sure they've spent more and 16% who say they may have spent more because of mobile shopping.

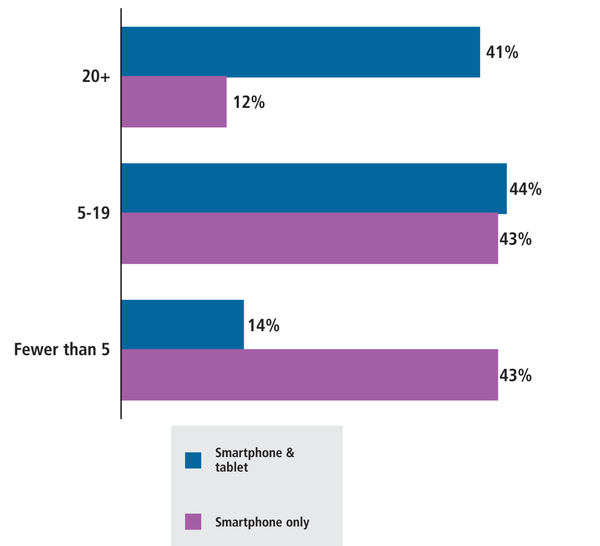
People who own both devices are more likely to use smartphones than tablets for in-store purchases or purchases made in public settings (such as on public transit), as well as being more likely to scan/swipe coupons or listen to audio on them. They're somewhat more likely to use tablets than smartphones for making purchases on websites.

WHICH DEVICES OWNERS OF BOTH SMARTPHONES AND TABLETS USE FOR VARIOUS SHOPPING ACTIVITIES



SOURCE: Ipsos OTX MediaCT

NUMBER OF PURCHASES MADE VIA MOBILE, OWNERS OF BOTH SMARTPHONES & TABLETS VS. OWNERS OF SMARTPHONES ONLY



SOURCE: Ipsos OTX MediaCT

SOURCE: Ipsos OTX 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: Contact for information.

Mobiles Go Everywhere — Really

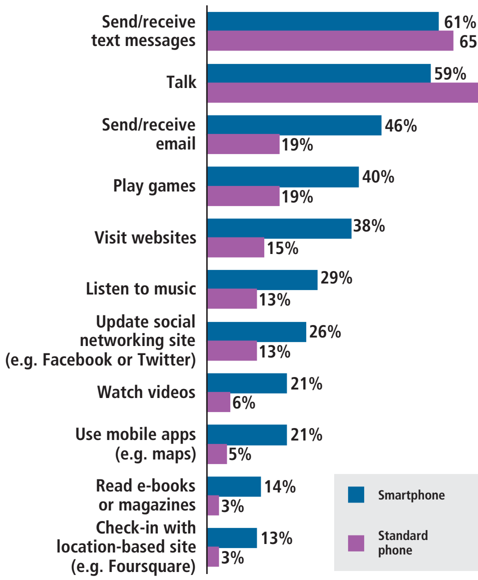
Consumers' desire to stay connected (and/or entertained) at all times knows no bounds; more than half of mobile phone owners admit to having used their phones while using the restroom, according to Insight Express. Two thirds of smartphone owners (66%) have used their phones in the toilet, while 51% of owners of standard phones have done so.

Looking at specific ways people use their phones in the bathroom, the majority are using them to communicate — talking, texting, or emailing — but substantial numbers are also using them for entertainment.

Owners of smartphones, having access to a wider variety of functions in their devices, are more likely than owners of standard phones to use them for entertainment, web-surfing, and social networking. The most traditional form of in-bathroom entertainment — reading a book or magazine — ranks lowest on the list.

Restrooms aren't the only surprising place people bring their phones — more than half of employed adults who have smartphones check them while they're driving, according to CareerBuilder. People who work in sales (66%) are most likely to use their smartphones while driving, compared to 59% of those who work in business or professional services occupations and half of health care workers. For many, checking in constantly is a requirement; 18% of workers say their jobs require them to be accessible via mobile during non-business hours, while 14% feel obligated to keep tabs on work via mobile because of the poor economy.

HOW PEOPLE USE THEIR MOBILE PHONES IN THE BATHROOM, SMARTPHONES VS. STANDARD PHONES



SOURCE: InsightExpress

SOURCES: "Digital Consumer Portrait: Mobile Usage in the Bathroom, February 2011," InsightExpress, Joy Liuzzo, Senior Director, 333 Ludlow St., North Tower, 5th Fl., Stamford, CT 06902; 203-359-4174; jliuzzo@insightexpress.com; www.insightexpress.com. Price: Contact for information.

CareerBuilder, Allison Nawoj, Corporate Communications Manager, 200 N. LaSalle St., Chicago, IL 60601; 773-527-2437; allison.nawoj@careerbuilder.com; www.careerbuilder.com

Morning Is Mobile Email Time

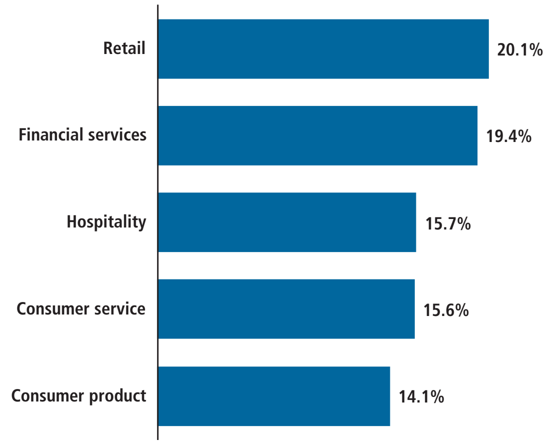
Users of mobile email are most likely to read emails on their phones during the early morning, according to Knotice. Opening of mobile emails peaks between 6 a.m. and 7 a.m., then drops off sharply at 9 a.m., when most mobile users are at work and checking email on their phones less frequently. It picks up again during the late evening, from 10 p.m. to midnight.

Owners of iPhones are most likely to open their mobile emails, opening 8.7% of the emails they receive, followed by iPad owners (2.0%) and Android owners (1.9%).

The comparatively low open rate among Android users is especially striking given that Android devices overtook iPhones in terms of numbers owned at the end of 2010.

Emails sent by retailers are most likely of all marketing emails to be opened (20.1% of those sent are opened), while business-to-business emails (3.0%) are least likely to be opened via mobile.

MARKETING EMAILS CONSUMERS ARE MOST LIKELY TO OPEN ON THEIR MOBILE PHONES, BY INDUSTRY



SOURCE: Knotice

SOURCE: "Mobile Email Opens Report, Q4 2010," January 2011, Knotice, Brian Deegan, CEO and Co-founder, 526 S. Main ST., #705, Akron, OH 44311; 800-801-4194; info@knotice.com; www.knotice.com. Free download: http://www.knotice.com/reports/knotice_mobile_email_opens_reports_q42010.pdf

Close To Half Of Mobile Phone Owners In U.S. Play Games

More than half of mobile phone owners (52%) in the U.S. and UK have played games on their phones, according to Information Solutions Group for PopCap Games. Mobile phone owners in the UK (73%) are more likely than their U.S. counterparts to have used their phones for gaming (44%). Two in 10 American mobile owners (21%) and 35% of UK mobile owners are avid mobile gamers (defined as having played in the past week).

U.S. mobile gamers are more likely than their UK counterparts to recommend games they like to others: 60% of U.S. gamers who have played in the past month have recommended games to others, compared to 53% of UK gamers.

Just over half (55%) of avid mobile gamers are male. Almost half (47%) of avid mobile gamers play daily, as do 35% of mobile gamers (defined as those who have played at least once in the past month). Owners of smartphones are much more likely than owners of traditional phones to be avid mobile gamers. Six in 10 mobile gamers (61%) and 69% of avid gamers own smartphones.

Smartphone owners also spend more time playing mobile games than owners of traditional cell phones do: 37% of smartphone owners play at least an hour per week, compared to 25% of owners of traditional phones. Smartphone gamers bought an average of 5.4 mobile games in 2010, compared to 2.9 bought by gamers with standard phones.

Smartphone owners spent \$25.57 and standard-phone owners spent \$15.70 on mobile games in 2010. Although mobile gaming is more widespread in the UK, U.S. gamers spend more money on mobile games. U.S. gamers spent an average of $25.25 on mobile games in 2010 and expect to spend $25.94 in 2011, while UK gamers spent $17.85 in 2010 and expect to spend $18.82 in 2011.

Gaming accounts for 23% of non-calling mobile phone minutes among all mobile gamers and 27% among avid gamers. Mobile gamers are also transferring some of their videogame play from computers to mobile phones. In 2009, 53% said they played videogames most often on their computers, while 17% said they played most often on their phones. In 2011, 30% play most often on computers, while 44% play most often on mobile phones.

SOURCE: Information Solutions Group, Carll Frye, Founder, 227 Bellevue Way NE, #300, Bellevue, WA 98004; 425-373-1115; carll@infosolutionsgroup.com; www.infosolutionsgroup.com.

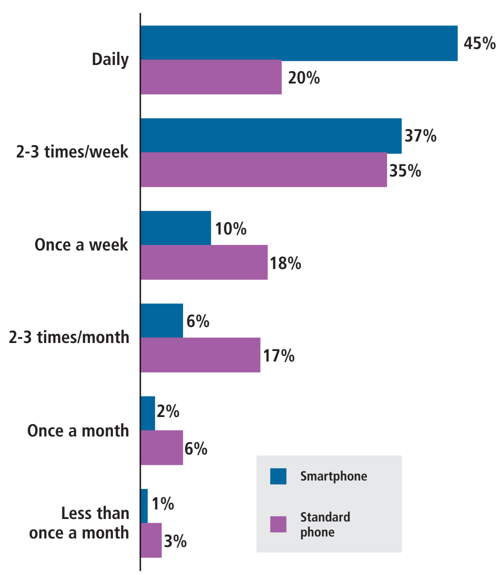
Cell Phones Encounter A Variety Of Accidents

More than a third of U.S. online consumers (36%) say they (or someone they know) have dropped a cell phone in a toilet, according to Retrevo. Three in 10 have spilled coffee or some other liquid on a cell phone (30%), or dropped the phone into a pool, lake, or other body of water (31%). Four in 10 consumers (44%) have broken a cell phone (or know someone who has) by dropping it on the floor.

Owners of Blackberry smartphones (62%) and iPhones (61%) are more likely than those who own Android phones (49%) to have protected their phones with a password. Almost four in 10 Android owners (39%) admit that they haven't taken any steps to prevent someone else from accessing the data on their phones. Owners of Android phones (39%) are also more likely than Blackberry owners (31%) or iPhone owners (26%) to say they don't know how they'd get their phones back if they lost them.

SOURCE: Retrevo Gadgetology Report, June 2011, Retrevo, Paul Kaye, VP Sales and Business Development, 440 N. Wolfe Rd., Sunnyvale, CA 94085; 855-738-7386; paul@retrevo.com; www.retrevo.com. Price: Contact for information.

HOW OFTEN U.S. AND UK MOBILE GAMERS PLAY, BY TYPE OF MOBILE PHONE OWNED



SOURCE: Information Solutions Group for PopCap Games

What Kids Do And Like On iPhones

Two in three kids 4-7 have used an iPhone or iPod Touch, with most (85%) using one that is owned by a parent, according to PBS Kids and the Joan Ganz Cooney Center at Sesame Workshop. Kids typically play games on these devices, with each session lasting 5-20 minutes.

More than half of children (54%) do not need an adult to help them with the iPod/iPhone; in fact, 64% of kids say these devices are "easy" or "very easy" to use. Even when children encounter difficulties, they don't give up or get bored. They continue playing until they master or overcome the problem themselves, groups the report.

While children may not need help using these devices, nearly all (97%) like it when a parent/friend/family member helps them play with it; 61% prefer playing with someone else rather than alone.

Parents typically see these devices as tools for distraction rather than educational vehicles. Kids use them in the car, but 86% of apps are downloaded by the parent. Only 12% of parents rate the educational potential of apps as a 9 or 10 (1 being no potential, 10 being a great learning tool.)

What Kids Like In Apps:

Keep it fresh. Many children "burn out" if there are not new levels or content to keep them interested.

Fast Load Time. Children get bored and impatient if they have to wait for content to load between questions or levels. It's also important for devices to feature kid-friendly components, such as an obvious power button. They also want the design to minimize the necessity of a sweeping motion, and to increase the size of the menu icons.

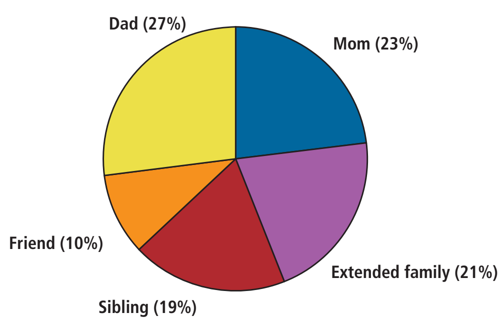
Humor. Kids seek out activities that make them laugh, even when the content is too hard or easy.

Incentives, goals. Kids like having a goal to reach or having something — such as collecting virtual stickers — for motivation. However, once they collect the prizes or reach their goal, children are likely to abandon the game.

Parental involvement. Younger children, in particular, enjoy having a parent as a playmate. Developers, for instance, could create games that allow for them to play together either on the same device or on two devices that can be synchronized.

[Ed note: It's important to note that the report only covers Apple's iPod and iPhone. Google's Android is emerging as a viable alternative with "unexpected" and "steady" adoption rates. In some regions overseas, Android is more popular than Apple.]

OWNER OF IPHONE THAT KIDS PLAY WITH



SOURCES: Joan Ganz Cooney Center PBS Kids

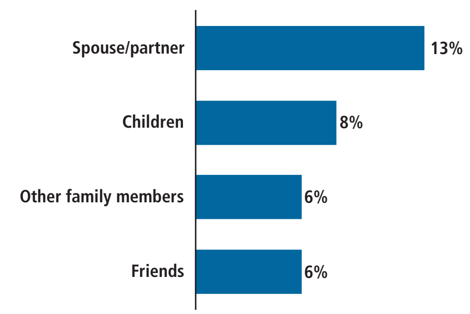
SOURCES: Joan Ganz Cooney Center, Michael Levine, Executive Director, One Lincoln Plz., New York, NY 10023; 212-875-6510; michael.levine@sesameworkshop.org; www.sesameworkshop.org.

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

Kids Download Apps On Own At Age Nine

Children begin downloading apps to a parent's phone at age nine, according to Nielsen. Children download 30% of the total apps on their parents' devices.

WHO DOWNLOADS APPS TO A PARENT'S PHONE, 2011



SOURCE: Nielsen

SOURCE: Nielsen, Nic Covey, Director of Insights, 200 W. Jackson Blvd., #2700, Chicago, IL 60606; 312-385-6718; nic.covey@nielsen.com; www.nielsen.com

Most Kid-Related Apps Are Free; Gaming Is Most Popular

More than eight in 10 apps (82%) downloaded for children are free, according to the NPD Group. The zero cost is the key selling point, with 75% of downloaders acknowledging it as the reason they acquired the app.

Overall, most devices have fewer than 20 apps specifically for children; 7% have more than 60. Although kids spend the most time playing game-related apps, they are most likely to download music-related apps. Six in 10 downloads are music-related (61%), followed by games, and video.

Three in 10 app users (30%) delete apps that aren't used within a week, while only 1% of kid-related apps are abandoned after one time.

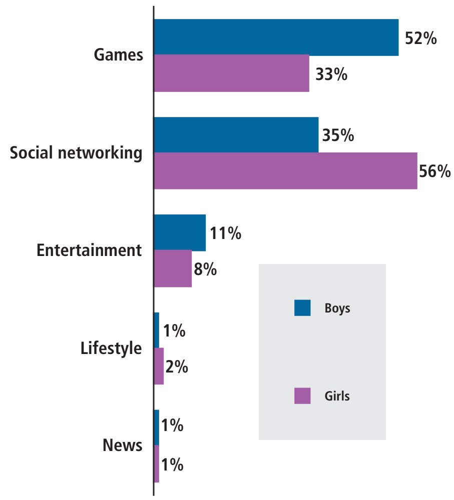
SOURCE: NPD Group, Anita Frazier, Entertainment Industry Analyst, 900 W. Shore Rd., Port Washington, NY 11050; 858-755-1854; anita_frazier@npd.com; www.npd.com.

Teen Smartphone App Preferences

When it comes to smartphone app usage, teens favor games and social networking tools the most, according to market research firm Lab42. Teen boys who use smartphones prefer game apps (52%), while teen girls who use smartphones prefer social networking apps (56%). Teens' top app preferences are roughly in line with those of smartphone-owning moms, who most frequently or commonly use social networking apps (82%) and game apps, according to Mom Central Consulting.

APPS USED MOST OFTEN BY TEENS, BY GENDER, 2011

Among teen smartphone users

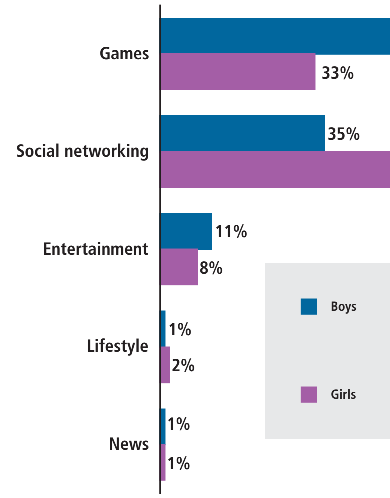


SOURCE: Lab42

SOURCE: Lab42, Laura Rokita, VP Market Research, 213 N. Racine Ave., Chicago, IL 60607; 312-685-1242; info@lab42.com; www.lab42.com.

Mom Central Consulting, Erica Gatlin, VP Client Strategy, 77 Chapel St., Newton, MA 02458; 617-244-3002; egatlin@momcentral.com; www.momcentral.com.

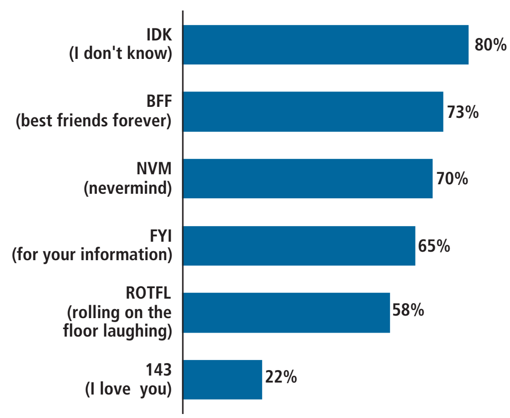
APPS USED MOST OFTEN BY TEENS, BY GENDER, 2011



NOTE: Among teen smartphone users

SOURCE: Lab42

TEENS WHO ARE ABLE TO IDENTIFY COMMON TEXT ACRONYMS



SOURCE: Lab42

Teen Texting And Phone Habits

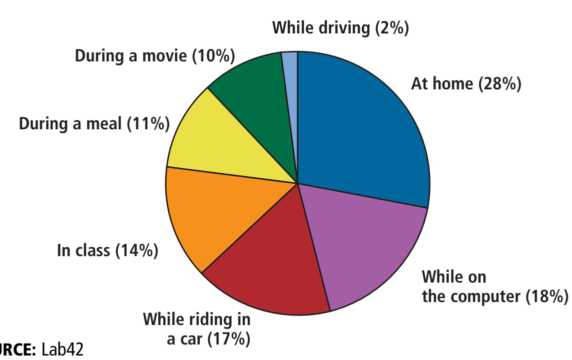
Nearly half of teens (45%) send at least 30 text messages per day, primarily to "just chat" (54%) or to make plans with friends (20%), according to market research firm Lab42. Teens are less likely to use text messaging to gossip (10%), flirt (7%), or to check in with their parents (3%).

Teens overwhelmingly prefer to text than talk on their phones (71% vs. 29%). The largest number (34%) talk on their cellphones for less than 15 minutes per day; 13% talk for more than an hour every day.

Teens also use their phones to send pictures. About half (51%) say they send a few picture messages each month, while 19% send one to three a day, and 6% send more than three a day. One in four (24%) never send picture messages.

SOURCE: Lab42, Laura Rokita, VP Market Research, 213 N. Racine Ave., Chicago, IL 60607; 312-685-1242; info@lab42.com; www.lab42.com.

WHERE TEENS PRIMARILY SEND AND RECEIVE TEXT MESSAGES, 2011



SOURCE: Lab42

Teens Aren't Big On QR Scanning

Quick-response (QR) barcode scans are swiftly gaining favor among entertainment marketers (see, for example, Brand Synergy Group's Rihanna concert campaign for Nivea, EML, Sept. 1, 2011, p. 1). Teens, however, appear to be less interested in the mobile-device technology than their parents, according to several studies.

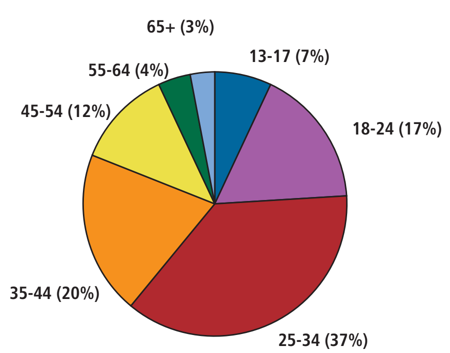
Teens and college students, for instance, are more likely to use daily deal app Groupon than QR scans (32% vs. 21%), according to Ypulse. Two in three teens and college students have no idea what QR codes are, and 6% have seen them but can't figure out how to use them.

Among those who have heard of QR codes, 42% think they are easy and useful, 13% think they are useful but difficult to use, and 9% think they are easy to access but not useful, Ypulse says.

Youth marketing firm Dubit reports that 72% of those ages 11-18 in the UK either do not have or are unaware that they have the necessary software to read QR codes on their phones. Only 43% can correctly identify a QR barcode scan. More than two in 10 (22%) think it's an RFID tag (for retailers), while 19% don't know what it is, and 12% think it's an infograph. Among teen girls in the UK, 8% think a QR scan is a magic-eye picture.

Other studies show the QR audience as nearly evenly split between those older than age 35 and those younger. Only 7% of teens ages 13-17 have used the technology, according to comScore. Yet those between ages 25-34 account for 37% of QR code scanners, and those ages 18-24 are 36% more likely than the average adult to use QR code scanners.

AGE BREAKDOWN OF QR SCANNERS, SUMMER 2011



SOURCE: comScore

SOURCES: comScore, Mark Donovan, SVP Mobile, 11950 Democracy Dr., #600, Reston, VA 20190; 703-438-2000; mdonovan@comscore.com; www.comscore.com.

Dubit Research, Paula Cubley, Head of Marketing, The Half Roundhouse, Wellington Rd., Leeds, UK LS12 1DR; 01-113-3947-920; enquiry@dubitlimited.com; www.dubitresearch.com.

Ypulse, Melanie Shreffler, Editor-in-Chief, 299 Broadway, #1900, New York, NY 10007; 646-597-6726, x306; melanie@ypulse.com; www.ypulse.com.

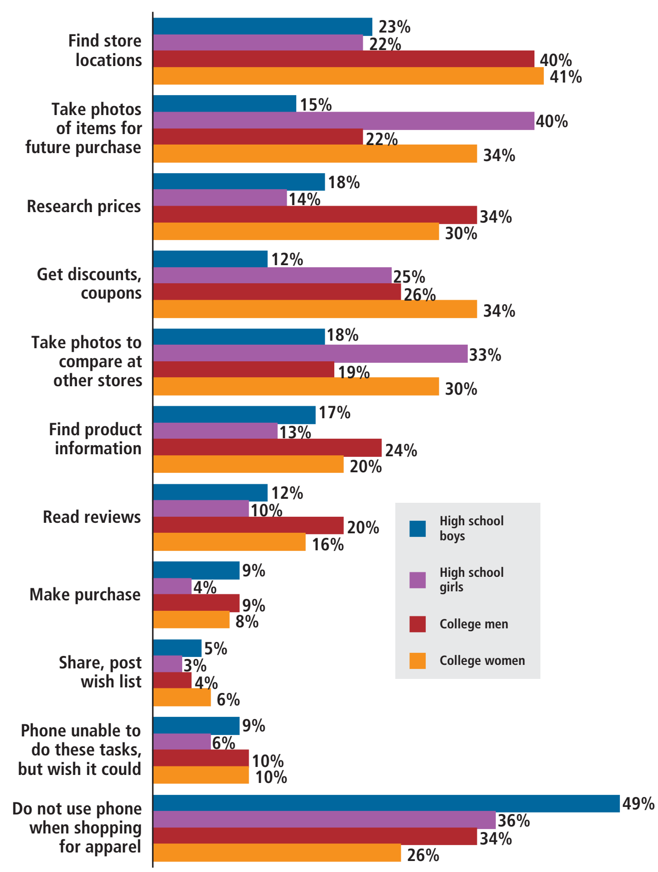
Smartphones Assist Students With Apparel, Accessories Purchases

Two in three high school and college students (66%) who have smartphones use them when shopping for apparel and accessories, according to Ypulse. Girls are more likely than guys to take photos of products they want to buy in the future and as a reminder to look for similar items.

Black students more likely than students of other races/ethnicities to use their phones when shopping. Some 15% make purchases from their phones, compared to 8% of students overall. Black students are also more likely to search store locations, compare prices, and post "wish lists" of desired products online.

Asian and Hispanic students are more likely than White or Black students to use their phones to research products and read reviews.

HOW HIGH SCHOOL AND COLLEGE STUDENTS USE THEIR SMARTPHONES TO SHOP FOR APPAREL/ACCESSORIES, 2011



SOURCE: Ypulse

SOURCE: Ypulse, Melanie Shreffler, Editor-in-Chief, 299 Broadway, #1900, New York, NY 10007; 646-597-6726, x306; melanie@ypulse.com; www.ypulse.com.

Teens Fall, Order Food While Texting

With teens sending an average 3,000 texts messages per month, they frequently multi-task while doing so:

- 23% have tripped/fallen when texting;
- 58% text while on the toilet;
- 46% text while ordering food and drinks;
- 59% text with family while in the same house;
- 60% text with friends while in the same room;
- 22% have asked strangers to stop texting because it was a nuisance.

SOURCE: TextPlus (GOG11), Drew Olanoff, Director of Community, 13160 Mindanao Way, Marina del Rey, CA 90292; 877-776-0611; bizdev@gogii.net; www.textplus.com.

factoids

➤ A third of mobile phone owners (33%) have used their devices to access a **retailer's website**, most commonly to compare prices (56%) or products (46%). *(ForeSee Results; phone: 734-327-3852)*

➤ A third of cell phone owners (33%) are stressed out because **mobile technology** means they are constantly available to their employers, whereas 20% are stressed about keeping up with new technology. *(VTech; phone: (011) 852-2680-1000)*

➤ More than a quarter (26%) of the **mobile apps** smartphone and tablet users downloaded in 2010 were only opened once. *(Localytics; phone: 617-418-4422)*

➤

TOP 10 CITIES FOR GPS SEARCHES

1. Los Angeles
2. Dallas/Ft. Worth
3. Chicago
4. Houston
5. Atlanta
6. Detroit
7. Miami
8. San Antonio
9. New York
10. Riverside-San Bernadino, CA

SOURCE: TeleNav, March 2011, Darius Pczuski, VP Marketing, 1130 Kifer Rd., Sunnyvale, CA 94086; 408-245-3800; business@telenav.com; www.telenav.com

➤ **Used phones** make up fewer than 5% of mobile phones sold in the U.S. *(International Data Corp.; phone: 508-872-8200)*

➤ There are 5 billion **mobile phone** subscribers worldwide; by the end of 2011, one billion of these will have broadband. *(ABI Research; phone: 516-624-2500)*

➤ One in 20 global mobile phone owners (5%) **buy tickets** for entertainment, events, or travel on their mobile phones. *(Juniper Research; phone: 011-44-1256-830001)*

➤ Almost three in 10 adults (29%) say they'd use a quick-service restaurant mobile phone app to **place food orders**. *(National Restaurant Association; phone: 202-331-5900)*

➤ More than six in 10 **smartphone** owners (62%) believe their devices are out of date — or will be by the time their contracts are up. *(Retrevo; phone: 855-738-7386)*

➤ **Mobile commerce** is projected to reach $119 billion worldwide by 2015. *(BitWizards; phone: 850-226-4200)*

➤ Seventy million U.S. consumers accessed **email** through smartphones or other mobile devices in 2010. *(MarketingSherpa; phone: 401-247-7655)*

➤ Four in 10 smartphones owned by U.S. consumers use the **Android** operating system. *(Nielsen; phone: 646-654-5000)*

➤

TOP 10 MOBILE APP CATEGORIES, MAY 2011

Music/Entertainment
Games
Mobile Social Networking
Communications
Weather
News
Health & Fitness
Productivity/Tools
Travel/Local
Sports

SOURCE: Millennial Media; phone: 410-522-8705

➤ Smartphone owners whose phones weigh five ounces or less are more likely than those with **heavier phones** to be satisfied with them. *(J.D. Power and Associates; phone: 248-312-4119)*

➤ Smartphone owners are more likely than feature phone owners to send/receive **text messages** (86% vs. 60%). *(Mobile Marketing Association; phone: 646-257-4515)*

➤ Between 7 a.m. and 11 p.m., more than 20 million U.S. consumers per hour are using **mobile apps**. *(Flurry; phone: 415-348-1445)*

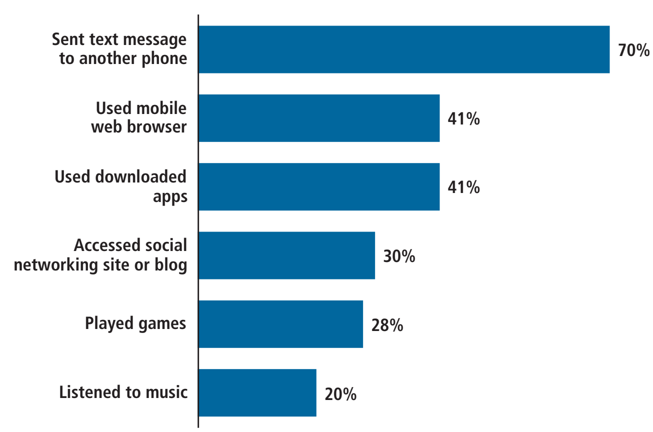
➤ Almost four in 10 consumers who buy content from **iTunes** (39%) have purchased mobile apps so far in 2011, up from 31% in 2010. *(The NPD Group; phone: 516-625-0700)*

➤ Almost a fifth of mobile shoppers (19%) are comfortable **spending** $500 or more on a single purchase from a smartphone and/or tablet. *(JiWire; phone: 415-821-8600)*

➤ Almost three in 10 mobile phone owners (29%) have **turned off their phones** in the past 30 days just to get a break from using them. *(Pew Research Group; phone: 202-419-4500)*

➤

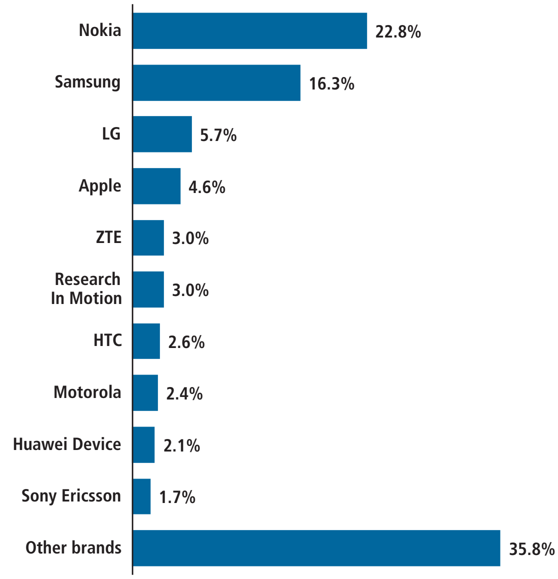
ACTIVITIES U.S. MOBILE PHONE OWNERS DID ON THEIR PHONES IN JULY 2011



SOURCE: comScore MobiLens, Stephanie Flosi, Senior Marketing Communications Analyst, 233 S. Wacker Dr., #3400, Chicago, IL 60606; 312-777-8801; sflosi@comscore.com; www.comscore.com. Price: Contact for information.

➤

MARKET SHARE OF MOBILE DEVICE BRANDS WORLDWIDE, SECOND QUARTER 2011



SOURCE: "Market Share: Mobile Communication Devices by Region and Country, 2Q 2011," Gartner, Inc., Annette Zimmerman, Principal Research Analyst, 56 Top Gallant Rd., Stamford, CT 06902; 203-964-0096; info@gartner.com; www.gartner.com. Price: $9,995.

➤ Among magazine readers who noticed ads with 2D **bar-codes** in them, 4% took pictures of the codes on their cell phones. *(GfK MRI; phone: 212-884-9200)*

➤ An estimated 19.8 million U.S. adults are expected to redeem **mobile coupons** in 2011. *(eMarketer; phone: 212-763-6010)*

➤

MEDIA CONTENT IPAD OWNERS CONSUME ON THEIR DEVICES, 2010

eBooks	70%
Electronic magazines or journals	61%
Network TV programs	51%
Paid-for content	13%

SOURCE: Knowledge Networks; phone: 908-497-8040

online

Internet access is nearly universal, and the vast majority of those with access at home have broadband. Two thirds of online Americans have paid for online content — most often music or software. More than half watch online videos at least once a week, watching for more than five hours per week. Short-form videos make up the majority of online video viewing. Consumer-created videos such as those on YouTube are the most widely viewed, followed by music videos and full-length TV shows.

Although specific figures vary depending on the research methods (and how social networks are defined for the particular study), it's clear that the majority of Americans (two thirds or more) are now using social networks. Women are more active users than men — they make up the majority of users of most social nets, and tend to log in more frequently than men do. A third of social network users log in more than once a day.

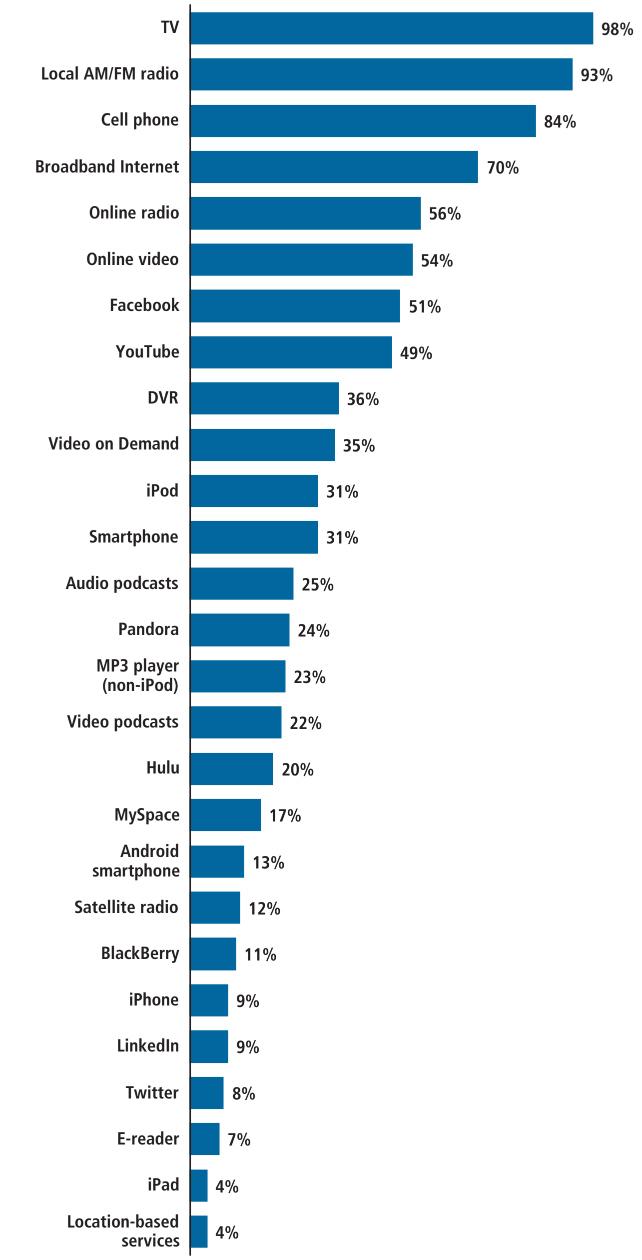
Facebook is the most widely used social network, while Twitter is the network most likely to be accessed via mobile. The majority of social media users go on the networks to keep in touch with family and existing friends rather than to meet new people. Although a quarter of social network users have "friended" or follow brands or companies, more than seven in 10 say no social networks influence their purchase decisions. A separate study finds social networks having more influence, though it's primarily through shoppers' personal contacts rather than direct interaction with the brand.

As online shopping and participation in social networks becomes ubiquitous, privacy becomes a stronger concern. It's not that consumers are unwilling to part with personal information, but they weigh the risks and benefits of doing so in each situation.

Internet Access Is Nearly Universal In U.S.

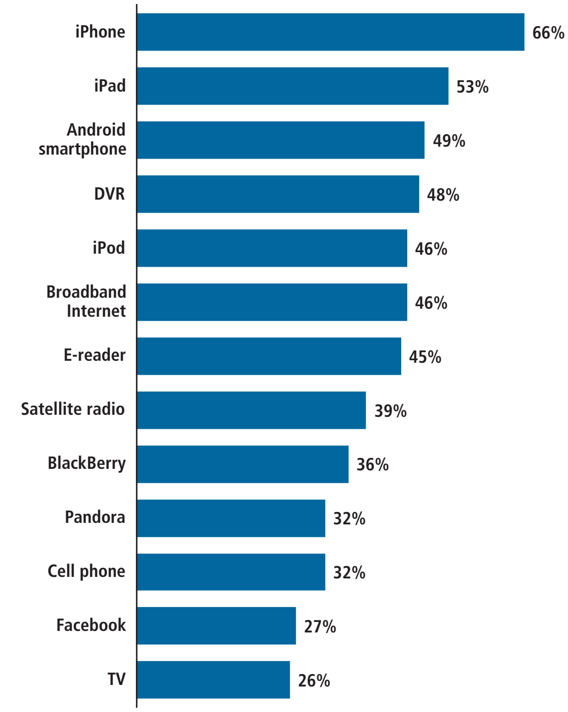
Nearly nine in 10 Americans age 12 and older (88%) have Internet access from some location, according to Edison Research and Arbitron. Of those who have Internet access at home, 86% have broadband, while 8% have dialup. More than half (51%) of all consumers age 12 and older have two or more working computers at home, about double the number who said so in 2004.

OWNERSHIP/USAGE OF ENTERTAINMENT/COMMUNICATION DEVICES AND SERVICES BY AMERICANS AGE 12 AND OLDER



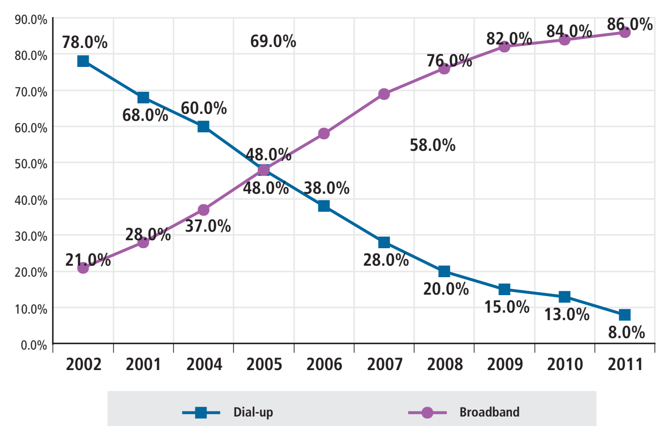
SOURCES: Edison Research and Arbitron

OWNERS/USERS WHO "LOVE" THEIR ELECTRONIC DEVICES



SOURCES: Edison Research and Arbitron

HOME INTERNET ACCESS: DIAL-UP VS. BROADBAND, 2002-2011



SOURCES: Edison Research and Arbitron

Almost two thirds (65%) of households with Internet access have wi-fi networks.

Online video viewing has tripled in the past four years: 38% of Americans age 12 and older watch online video in a given week, up from 12% in 2006. Three in 10 (31%) have watched videos on YouTube in the past week, and 41% have watched in the past month.

Owners of iPhones, iPads, or Android smartphones are most likely to say they "love" their devices.

SOURCE: "The Infinite Dial 2011: Navigating Digital Platforms," Edison Research and Arbitron. Edison Research, Steve Lemma, Research Coordinator, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; www.edisonresearch.com. Arbitron, Bill Rose, SVP Marketing, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-312-8000; www.arbitron.com.

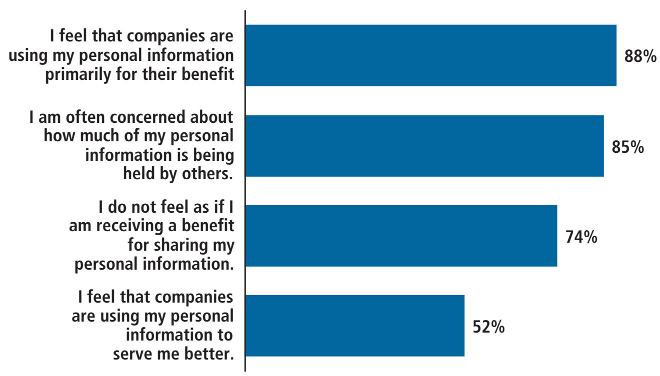
Consumers Are Concerned About Privacy, Expect To Be Rewarded For Sharing Data

Seven in 10 global adults (70%) are worried about the erosion of personal privacy due to digital information storing and sharing, according to McCann Worldgroup. Three quarters (75%) agree with the statement, "People share far too much personal information online these days."

Consumers are most concerned about having their financial information stolen or misused; they're less concerned about companies tracking their shopping or web browsing behavior in order to send them targeted ads and marketing offers.

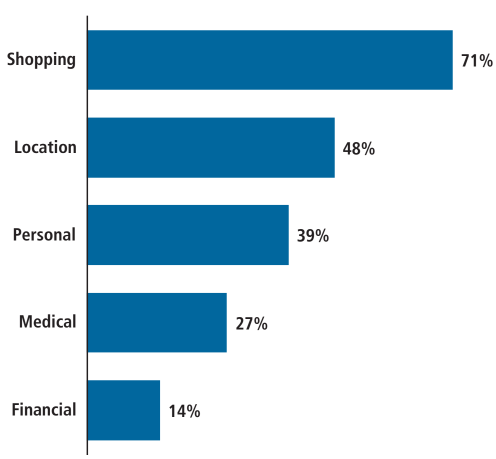
NORTH AMERICAN CONSUMERS' VIEWS ON HOW COMPANIES ARE USING THEIR PERSONAL INFORMATION

(Agree strongly or somewhat)



SOURCE: LoyaltyOne

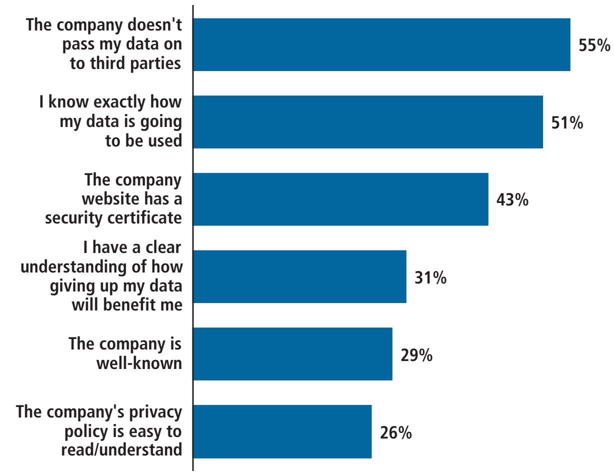
GLOBAL CONSUMERS' WILLINGNESS TO SHARE SPECIFIC TYPES OF DATA WITH BRANDS ONLINE



SOURCE: McCann Worldgroup

MOST IMPORTANT FACTORS IN HOW COMPANIES HANDLE CONSUMER PRIVACY ONLINE

(Respondents were asked to choose three)



SOURCE: McCann Worldgroup

More than eight in 10 global consumers (86%) believe there are benefits to sharing certain types of data with companies online. Almost two thirds (65%) cite having better access to discounts and promotions as a key benefit, and 49% cite having companies show them new products of interest as a benefit.

Most Trusted Industries

Consumers are most likely to trust banks (69% of global consumers and 65% of U.S. consumers) and credit card companies (57% of global consumers and 46% of U.S. consumers) to handle their personal data responsibly. Only two in 10 trust dating websites.

Segmenting By Attitude

The study segments both global and U.S. consumers by attitudes toward privacy; U.S. consumers are more likely than others to be highly concerned about their online privacy.

- **Savvy Shoppers**: Willing to share data with companies provided they receive benefits such as discounts in return and they feel confident that the company will safeguard their information.
- **Sunny Sharers**: Have a largely positive view of sharing information online; want to be connected and engaged. Careful when sharing financial information but share freely otherwise.
- **Eager Extroverts**: Heavily involved in social media; share personal details freely and frequently, but are concerned about their online habits affecting their personal and professional reputation.
- **Walled Worriers**: The most private and least trusting segment; willing to receive offers or news via email, but require assurances that any data collected won't be

shared with third parties.

- **Cautious Communicators**: Not especially worried about losing privacy but dislike mailings, messages, and frequent marketing contacts.

Questioning Company Motives

North Americans are skeptical about companies' motives for gathering their personal information, according to a study of consumers in U.S. and Canada by loyalty and relationship marketing firm LoyaltyOne. Almost nine in 10 (88%) feel that companies use consumers' personal information primarily for their own benefit, not that of the consumers.

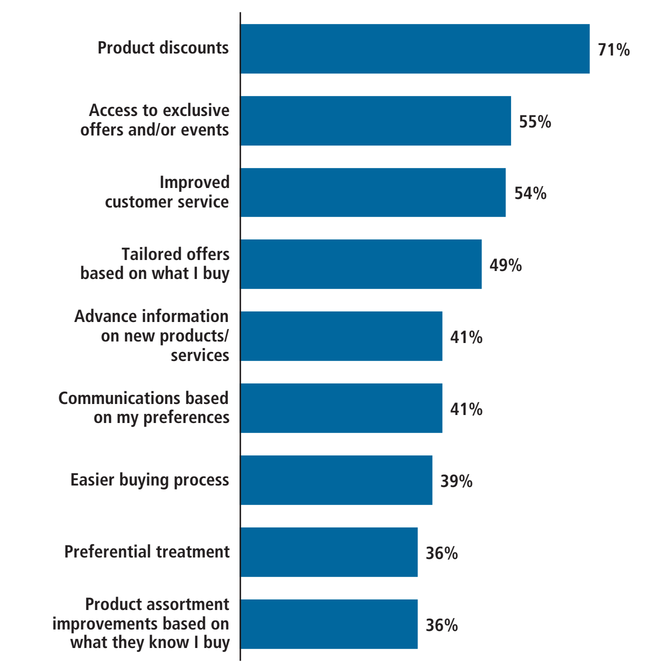
The majority don't feel that they're receiving any benefit for sharing their information, and only 9% strongly agree that companies are using their personal information to serve them better.

Consumers expect to receive tangible rewards — especially in the form of discounts and exclusive offers — in exchange for providing their personal information to companies.

Nearly a quarter of North American consumers (23%) have decided not to purchase an item they were interested in because they weren't sure how the company would use their personal information.

Four in 10 (43%) have refused to give personal information to a salesperson who asked for it.

WHAT CONSUMERS EXPECT TO RECEIVE IN EXCHANGE FOR PROVIDING PERSONAL INFORMATION



NOTE: Multiple responses allowed

SOURCE: LoyaltyOne

SOURCES: "The Truth About Privacy," October 2011, McCann Worldgroup, Mary Perhach, EVP/Chief Communications Officer, 622 Third Ave., New York, NY 10017; 646-865-4024; mary.perhach@mccannwg.com; www.mccannworldgroup.com. Price: Summary available online at no charge.

"Challenges Marketers Face in A Privacy-Worried World: A Report on U.S. and Canadian Consumer Attitudes About Responsible Data Collection and Use," October 2011, LoyaltyOne, Bryan Pearson, President/CEO, 438 University Ave., #600, Toronto, Ontario M5G 2L1 Canada; 416-228-6500; loyaltyonesales@loyalty.com; www.loyalty.com. Price: Available online at no charge.

People Dislike Barrage Of Email

More than three quarters (77%) of online adults in the U.S. say they've become more cautious in the past year about giving out their email addresses to companies, according to social media and email marketing firm Exact Target.

Almost two in 10 (18%) say they never open email from companies, even though 93% of U.S. online consumers subscribe to permission-based email. Seven in 10 (70%) say they always open emails from their favorite companies.

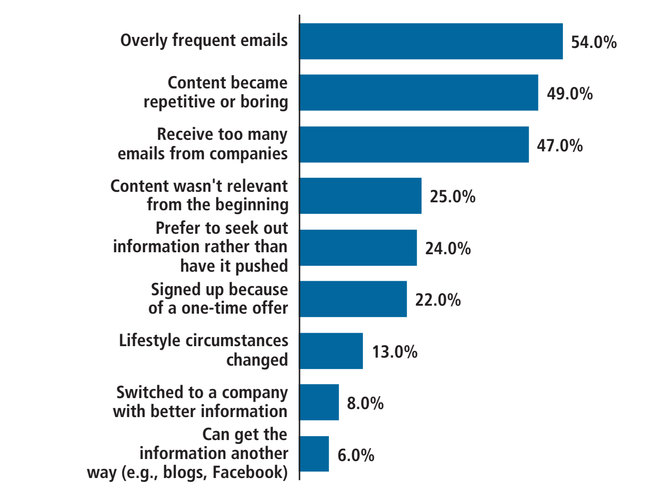
Eight in 10 online consumers (83%) check their email at least once a day; 64% check several times per day.

Nine in 10 email users (91%) have at some point signed up to receive emails from a company and later decided they didn't want to keep getting them. When this happens, nearly a quarter (23%) simply delete or ignore the unwanted emails rather than unsubscribing or even marking the messages as "junk" or "spam."

About two thirds (67%) go through the effort of unsubscribing, while 2% set up filters in their email programs to remove the emails from their inboxes.

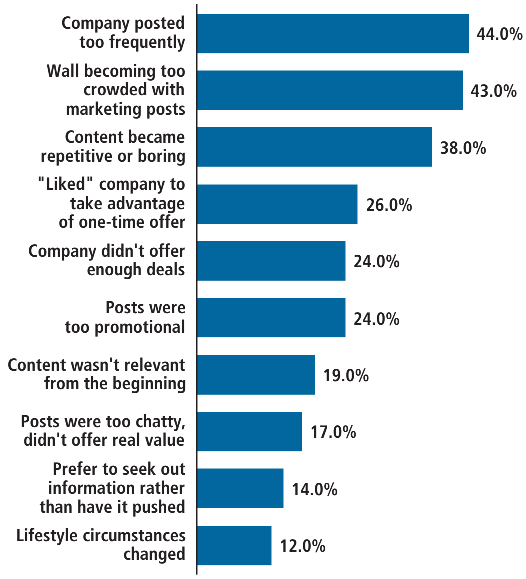
Consumers cite being contacted too frequently as the top reason they choose to unsubscribe from permission-based emails; it's also the chief reason Facebook users decide to "un-like" a company on Facebook.

REASONS PEOPLE UNSUBSCRIBE FROM OPT-IN EMAILS



SOURCE: Exact Target

REASONS PEOPLE "UN-LIKE" COMPANIES ON FACEBOOK



SOURCE: Exact Target

Almost two thirds (65%) of online adults are currently active on Facebook, and 73% have created Facebook profiles at some point. Eight in 10 Facebook users (84%) check their Facebook pages at least once a week, and 68% check at least once a day.

More than six in 10 (64%) Facebook users have chosen to be fans of at least one company on the site. On the other hand, 55% have "liked" a company and later decided they didn't want to see the company's posts. More than half (51%) of those who are fans of companies say they rarely or never visit the companies' pages after becoming fans.

Twitter is less widely used than email or Facebook; only 17% of U.S. online adults have created Twitter accounts, and only 9% are active users. Among Twitter users, 64% check their feeds at least once per day, and 48% check several times a day.

Four in 10 (41%) have chosen to follow a company and later stopped following. Nearly half (47%) of those who have created Twitter accounts have stopped using them completely.

Although it's not as widely used as Facebook or email, people who are active on Twitter are less likely to stop following companies once they've started than users of Facebook or email are to cease contact with companies through those media.

Twitter users are more put off by boring content than users of email or Facebook; it's their top reason to stop following brands on Twitter.

SOURCE: "The Social Breakup," Exact Target, Tim Kopp, Chief Marketing Officer, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; tkopp@exacttarget.com; www.exacttarget.com. Price: Free download available at: http://www.exacttarget.com/resources/sff8.pdf

The Best Online Advertising Formats Include Games, Quizzes, 3D Images

Successful online campaigns featuring 3D images, quizzes, polls, or games maximize the time users spend interacting, viewing, and engaging with an ad, according to video advertising company, Unicast.

Unicast's report — measuring user engagement and interaction — finds messenger units, which are ads displayed in instant message platforms, are highly successful in getting young users to engage and interact with an online ad.

Just as various formats perform more effectively than others, certain industries do a better job than others in employing them. To that end, restaurants and technology companies feature ads with the highest engagement times. The viewer spends an average 42 seconds interacting with a technology ad and 27 seconds with a restaurant ad.

Apparel manufacturers receive some of the highest click-through rates — calculated by total clicks divided by total impressions — at .55%.

Retailers garner the best ad display time — the length ad is shown on webpage — at 144 seconds per each ad. Consumer packaged food goods score well in video play time — length a video plays with ad including auto and user initiated — at 26 seconds.

Notably, these metrics tend to require additional insight. Ads that incorporate rollover elements, for instance, may attract a high — but ultimately negative — interaction rate as the user closes or tries to minimize the advertisement. Furthermore, it's uncertain which benchmark is more valued than another. Are click-through rates more important than engagement?

CHARACTERISTICS OF ONLINE ADS, BY INDUSTRY

INDUSTRY	CLICK-THROUGH RATE	DISPLAY TIME (IN SECONDS)	LENGTH OF VIDEO PLAY (IN SECONDS)	LENGTH OF ENGAGEMENT (IN SECONDS)
Apparel	0.55%	43	12	21
Beverages	0.41%	34	7	7
Consumer packaged goods: food	0.70%	30	9	8
DVD/video	0.05%	48	6	13
Film	0.49%	32	12	18
Music	0.10%	72	12	31
TV	0.17%	74	12	22
Video/Online games	0.44%	45	11	18
Restaurants	0.24%	43	12	27
Sporting goods	0.63%	50	17	18
Technology	0.44%	103	8	42

SOURCE: Unicast

SOURCE: Unicast, James Dillon, GM/Corporate SVP, 200 W. Cesar Chavez, #201, Austin, TX 78701; 512-469-5900; unicastbi@unicast.com; www.unicast.com.

Two-Thirds Of Internet Users Say They Pay For Online Content

Nearly two-thirds of Internet users (65%) have paid to download or access some kind of online content, from music to online dating personals, according to Pew Research Center's Internet & American Life Project.

Music and software are the most popular types of content, with 33% of Internet users reporting having downloaded or accessed each. More than one in five users (21%) have paid for cell phone or tablet apps. Meanwhile:

- 19% have paid for digital games;
- 18% have paid for digital newspaper, magazine, or journal articles or reports;
- 16% have paid for videos, movies, or TV shows;
- 11% have paid for members-only premium content from a website that has other free material on it; and
- 10% have paid for e-books.

Though the range of available content is broad, nearly half of Internet users (46%) have purchased only one or two types.

Among the survey's other findings:

- More Internet users pay for subscription services (23%) than download an individual file (16%) or access streaming content (8%).
- Of those Internet users reporting a dollar amount for purchasing online content, the typical user spent $10 per month.

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

P2P Traffic Tapering?

A study from Arbor Networks suggests that peer-to-peer movie downloading is fading as legitimate video streaming services, namely Netflix, rise in popularity.

The software firm shares data with *Wired* that estimates Netflix to have a 20% share of North American network traffic, while BitTorrent claims an 8% share. At its height in 2007, BitTorrent claimed a 30% share of traffic, Arbor Networks says.

There are several qualifications, however:

- Arbor Networks notes that "direct download" traffic from cyberlocker sites such as Megaupload is on the rise. It's unclear, then, whether a reduction in P2P volume necessarily translates to a reduction in overall file-sharing.
- *Wired* cites older research from Sandvine (2009-2010) that suggests P2P traffic continued to grow along with the increase in legal streaming services.
- The overall U.S. market for Internet content has hardly been static over recent years. According to Akamai's most recent State of the Internet report, 36% of U.S. Internet connections run at "high broadband" rates greater than 5 Mbps as of the fourth quarter of 2010. That figure represents a 12% year-over-year increase. Arbor Networks' most recent traffic share numbers would seem to represent slices of a larger pie than 2007.

SOURCE: Akamai Technologies, Robert Wood, SVP/Chief Development Officer, 8 Cambridge Ctr., Cambridge, MA 02142; 877-325-2624; www.akamai.com.

Arbor Networks, Paul Morville, VP Business Development, 6 Omni Way, Chelmsford, MA 01824; 978-703-6600; www.arbornetworks.com.

Photo Filing Is Now An Online Activity

The vast majority of Americans (82%) capture holiday memories with a digital camera, and 27% do so using a camera built into their cell phones, reports Photobucket. That's compared to 14% who took video and 11% who used a professional photographer.

A majority (58%) uploads photos to the Web to view, edit, and manage their collection of images. Most of those (53%) use three or more online photo storage sites. They most commonly share their online images via a social network (57%), a photo sharing site (49%), and by email (47%). Far fewer (27%) plan to print and mail hard copies of pictures.

Who is primarily responsible for snapping family photos?

- Mom (33%);
- Child/children (18%);
- Dad (17%); and
- Other family members (20%)

SOURCE: "Holiday Photo Usage Survey," Photobucket, James Goss, VP Operations, PO Box 559, Broomfield, CO 80038; 720-560-2072; www.photobucket.com.

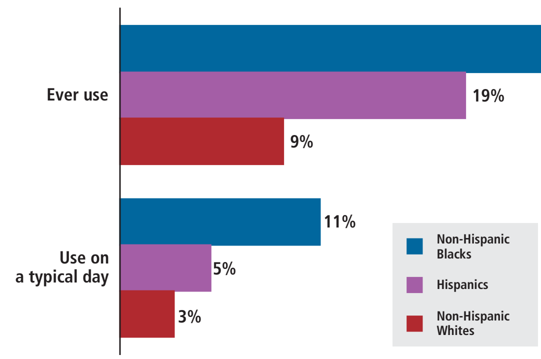
Twitter Finds Fans With Blacks And Hispanics

Black and Hispanic Internet users are more likely than their Non-Hispanic White counterparts to use Twitter, according to the Pew Research Group.

Blacks are twice as likely as Hispanics and nearly four times as likely as Whites to visit Twitter daily. The gap between Black and White Twitter users grew significantly between November 2010 and May 2011 — from eight percentage points to 16.

More than half (54%) of all Twitter users access the site on their mobile phones (the study did not break down this behavior by race/ethnicity due to sample size limitations).

U.S. TWITTER USERS, BY RACE/ETHNICITY



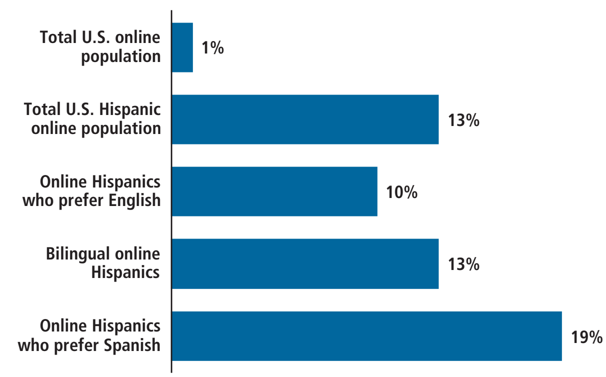
SOURCE: Pew Research Group

SOURCE: "Twitter Update 2011," June 1, 2011, Pew Internet and American Life Project, Pew Research Center, Aaron Smith, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4300; info@pewresearch.org; www.pewinternet.org. Price: Available online at no charge.

Online Spanish-Speakers Are Growth Market

Nearly two thirds of online Hispanics under age 34 (65%) either prefer to speak Spanish or are bilingual, according to Captura Group. As in overall population growth, growth of the online Hispanic market is outpacing that of the overall online market. Currently 14.6 million online Hispanics are bilingual or prefer Spanish.

GROWTH OF ONLINE HISPANIC POPULATION, BY LANGUAGE PREFERENCE, APRIL 2010-APRIL 2011



SOURCE: Captura Group

SOURCE: Captura Group, Lee Van, Founder, 3714 Fourth Ave., San Diego, CA 92103; 619-681-1858; lee@capturagroup.com; www.capturagroup.com. Price: Contact for information.

Online Videos Move Into Mainstream; Consumer-Created Clips Dominate But Movies And TV Are Gaining Viewers

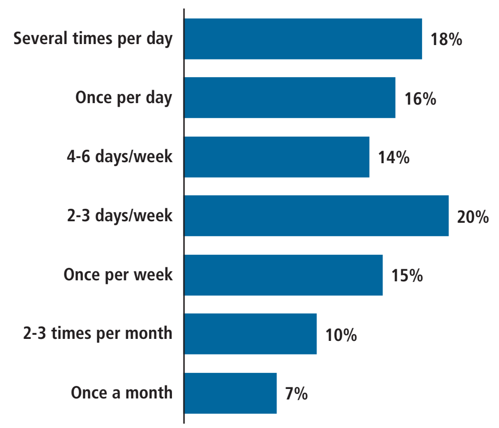
Online video is becoming mainstream entertainment, with young adults beginning to shift some of their viewing from traditional TV to online.

More than half of U.S. Internet users watch videos online at least once a week and nearly a quarter watch them daily, according to Frank Magid Associates. Viewing of online videos has grown among every age group of Internet users ages 8-64 since 2010. Internet users ages 18 and older spend an average of 5.6 hours per week watching online videos, up from 4.6 hours per week in 2010.

More than 173 million people watched online video in the U.S. during February 2011, viewing 31 billion streaming videos, according to a separate study by OMD.

More than half (56%) of those who watch online video weekly or more often are male, and viewership is growing fastest among 18-34-year-old men, according to Frank Magid Associates. Men ages 18-34 who watch online videos are

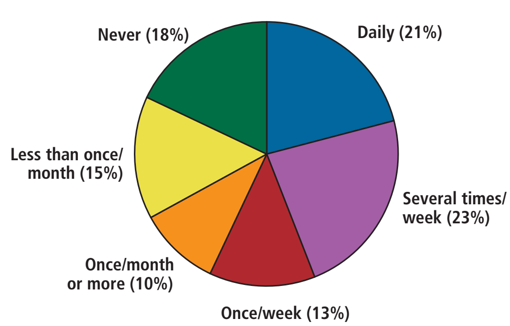
HOW OFTEN VIEWERS OF STREAMING VIDEO WATCH, JULY 2011



NOTE: Sample is individuals 18 and older who watch at least once a month

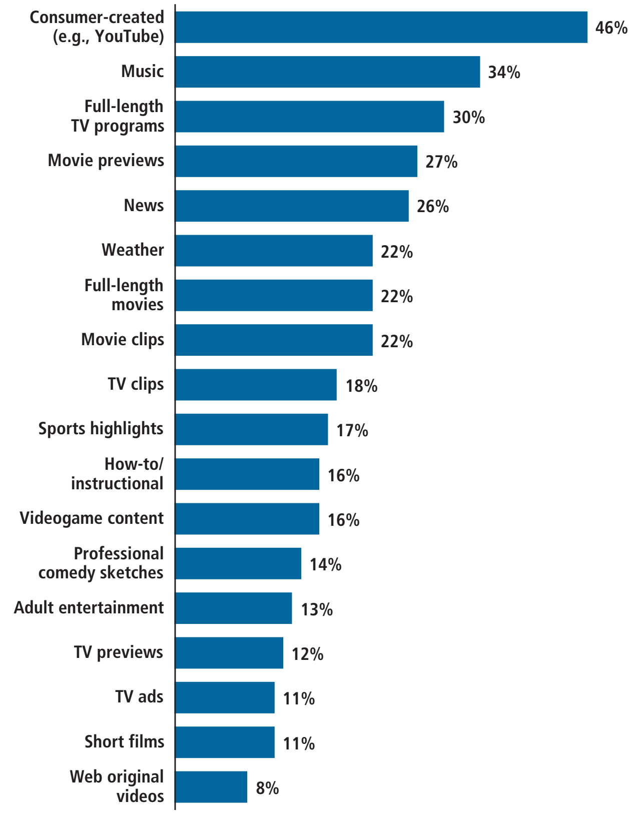
SOURCE: OMD

VIEWING OF VIDEOS ONLINE AMONG INTERNET USERS AGES 8-64, APRIL 2011



SOURCE: Frank Magid Associates

TYPES OF VIDEOS VIEWED MOST WIDELY ONLINE
(% of online video viewers who watch regularly)



SOURCE: Frank Magid Associates

more likely to consider their computer their primary entertainment medium than their television (39% vs. 28%).

The total online video audience, however, is 51% male/49% female, according to May 2011 comScore data cited by OMD.

Consumer-created videos such as those shown on YouTube are the most widely viewed genre, although viewership of full-length TV programs and movies is growing, finds Frank Magid Associates.

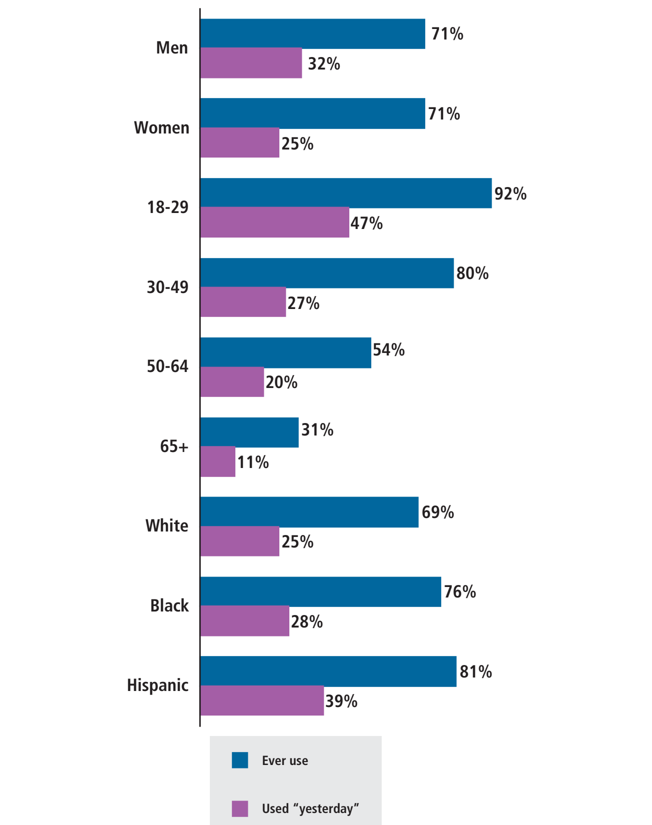
Four in 10 consumers overall (44%) consider television their primary entertainment medium, while 32% cite computers as theirs.

Although previous Nielsen studies found that avid video viewers had the heaviest viewing across all formats, this pattern is shifting; there's now a correlation between heavy viewing of online (streaming) video and light viewing of traditional TV, according to Nielsen. The pattern is most pronounced among adults ages 18-34 — among consumers in this age group, those who spend the most time watching online videos spend the least time watching TV, and vice versa.

Although streaming video is starting to pull some viewers' time away from television, the majority of online video viewers (65% of those who watch at least monthly) wouldn’t cancel their cable/satellite TV service and use streaming video as a replacement, according to OMD.

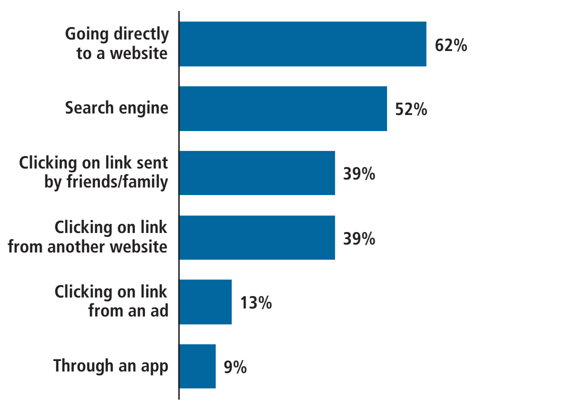
One fifth of videos watched online are shared with others after viewing. Viewers ages 18-24 share 28% of the videos they watch and those ages 25-34 share 24%.

ONLINE ADULTS WHO USE VIDEO SHARING SITES, BY AGE, GENDER, AND RACE/ETHNICITY, JULY 2011



SOURCE: Pew Internet and American Life Project

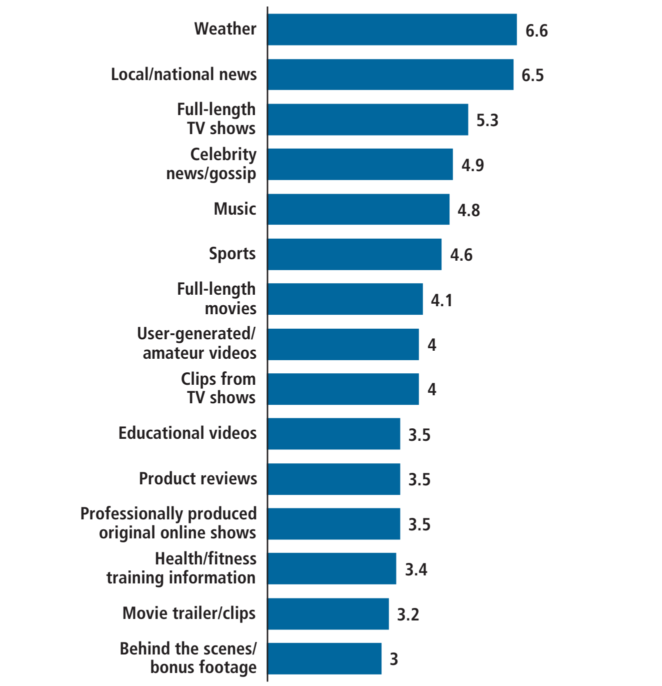
HOW ONLINE (STREAMING) VIDEO VIEWERS FIND NEW VIDEOS TO WATCH



NOTE: Multiple responses allowed

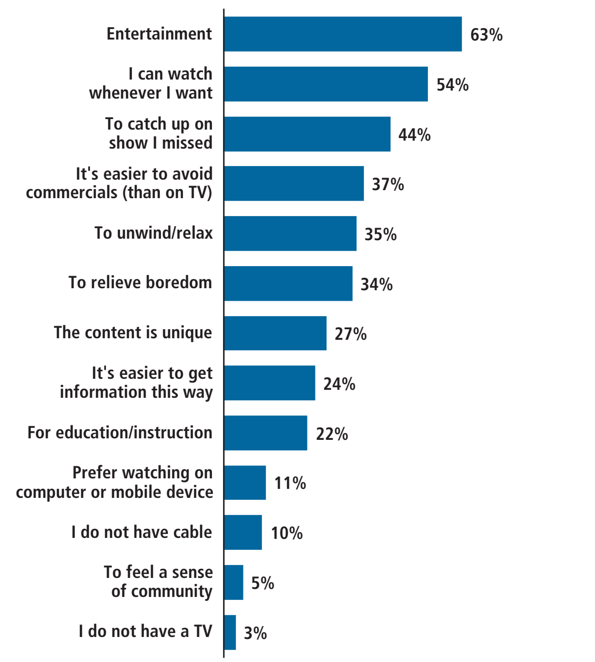
SOURCE: OMD

HOW MANY TIMES PER WEEK VIEWERS WATCH STREAMING VIDEO, BY GENRE



SOURCE: OMD

WHY CONSUMERS WATCH ONLINE (STREAMING) VIDEO



NOTE: Multiple responses allowed

SOURCE: OMD

More than seven in 10 Internet users (71%) use video-sharing sites such as YouTube or Vimeo, finds the Pew Internet and American Life Project. As with overall online video consumption, young adults are the most likely to use these sites: nearly half (47%) of 18-29-year-olds used them "yesterday," compared to 28% of all online adults. Black and Hispanic adults are more likely than non-Hispanic Whites to use video sharing sites.

TIME SPENT PER MONTH WATCHING VIDEOS ONLINE VS. TELEVISION, BY AGE, FIRST QUARTER 2011

(Hours: minutes)

	12-17	18-24	25-34	35-49	50-64	65+
Watching online video on computer	3:40	7:41	6:54	4:40	3:17	2:30
Watching online video on mobile phone	8:40	5:47	3:37	3:28	2:53	2:10
Watching (live) TV	107:40	123:00	137:04	160:52	198:13	220:49

NOTE: Sample is users of respective media.

SOURCE: Nielsen

SOURCES: "Magid Media Futures: Online Video Reaches New Heights In Digital Nation 2011," Frank Magid Associates, Andrew Hare, Research Analyst, 8500 Normandale Lake Blvd., #630, Minneapolis, MN 55437; 612-216-0703; ahare@magid.com; www.magid.com. Price: Contact for information.

"Expanding Platform, Shrinking Screens," July 2011, OMD (Omnicom Media Group), Pamela Marsh, Ph.D., Director, Custom research and Insights, 195 Broadway, 19th Fl., New York, NY 10007; 212-590-7244; pamela.marsh@annalect.com; www.omd.com. Price: Contact for information.

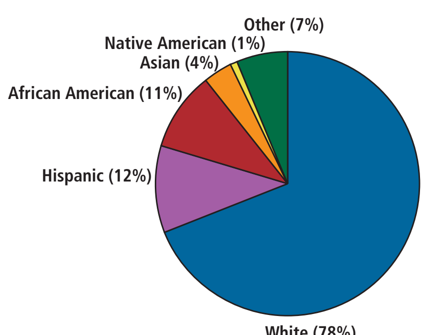
"State of the Media: The Cross-Platform Report," Quarter 1 2011, Nielsen, Kathleen Mathus, Communications Analyst, Television, 770 Broadway, New York, NY 10003; 646-654-5000; kathleen.mathus@nielsen.com; www.nielsen.com. Price: Available online at no charge.

"71% of Online Adults Now Use Video-Sharing Sites," July 25, 2011, Pew Internet and American Life Project, Kathleen Moore, Author, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; kmoore@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

Popularity Of Online And Mobile Video Isn't Hurting Television — Just Offering More Ways To View

Far from cannibalizing American consumers' television viewing, the increasing array of options for watching TV and video appears to be adding to their total viewing time — enabling people to access entertainment whenever and wherever it suits them. How, where, and when consumers watch is split along demographic lines — and is continually shifting.

ONLINE VIDEO VIEWERS, BY RACE/ETHNICITY, 2011



SOURCE: Nielsen

MONTHLY TV VIEWING, LIVE AND TIMESHIFTED, BY AGE, 4TH QUARTER 2010

(hours: minutes)

AGE	TRADITIONAL TV	DVR PLAYBACK
2-11	112:46	17:06
12-17	105:07	16:04
18-24	124:29	18:44
25-34	137:55	30:59
35-49	156:01	30:16
50-64	189:22	30:37
65+	210:34	26:22

NOTE: Live TV viewing is all U.S. TV households; DVR playback viewing is DVR households only.

SOURCE: Nielsen

Timeshifted TV Viewing

More than a third of U.S. consumers age 12 and older (36%) own or use DVRs, and 35% watch Video-On-Demand (VOD), according to Edison Research and Arbitron.

In 4th quarter 2010, the average American watched two hours and 21 minutes of timeshifted TV per week (including households with and without DVRs). Nearly four in 10 households (38%) that have televisions also have DVRs as of February 2011, according to Nielsen.

DVR usage is highest among adults ages 25-64, who watched more than 30 hours per month of TV recorded on DVR in 4th quarter 2010. Teens and adults ages 18-24 are least likely to watch programs recorded on DVRs, and most likely to watch videos on their mobile phones.

Non-Hispanic Whites are the heaviest users of DVRs, while African Americans watch the most live TV and DVD video. Hispanic households are least likely to own DVRs — only 29% have them, compared to 38% of overall U.S. households with TVs.

Online Video

More than half of Americans age 12 and older (54%) watch online video, according to Edison and Arbitron. Nearly half (49%) watch videos on YouTube. Three in 10 (31%) have watched videos on YouTube in the past week, and 41% have watched in the past month. The audience for online video has tripled in the past five years — 38% watch in a typical week in 2011, up from 12% in 2006. Online video viewers spend an average of three hours, 26 minutes per week watching in this format, up from two hours, 20 minutes in 2008.

Nearly 144 million Americans watched videos online via computers in January 2011; women (54%) are more likely than men (46%) to watch online video, according to Nielsen.

More than 172 million U.S. Internet users watched online videos in April 2011, spending an average of almost 15 hours watching that month, according to comScore. Google was the top source for video — primarily due to Google-owned YouTube.

Users of social networking sites are more likely than online adults overall to visit network TV and other broadcast media websites — 49% of social network users and blog readers visited TV network sites in January 2011, compared to 40% of all online Americans, according to Nielsen. Half of Facebook users and 76% of Twitter users visited TV network and broadcast media during that time.

TOP ONLINE VIDEO SOURCES, BY NUMBER OF UNIQUE VIEWERS, APRIL 2011

	VIEWERS (000)	AVG. MONTHLY MINUTES WATCHED
Total U.S. audience	172,064	896.9
Google sites	142,720	286.1
VEVO	55,151	99.2
Yahoo sites	53,197	37.5
Facebook.com	46,695	19.6
Microsoft sites	46,547	40.8
Viacom Digital	42,590	80.4
AOL	40,112	42.3
NBC Universal	38,710	13.6
Turner Digital	29,454	33.0
Hulu	26,193	206.0

SOURCE: comScore

Connected TVs

Three in 10 U.S. households have at least one TV set that's connected to the Internet —whether directly, through videogame systems, or via Blu-Ray players — up from 24% in 2010, according to Leichtman Research Group. One in 10 U.S. adults (10%) watch online video using these devices at least once a week, up from 5% in 2010. Much of the increase is due to Netflix usage; 30% of Netflix subscribers watch videos from the Internet weekly, compared to 3% among non-subscribers.

Nearly a quarter of U.S. households (23%) have Internet-connected videogame systems, 10% have Internet-connected TVs, and 7% have Internet-connected Blu-Ray players (some households have more than one connected device).

Mobile Video

Nearly 25 million mobile subscribers (8%) watched videos on their mobile phones in 4th quarter 2010 — a 41% increase from 2009. Teens ages 12-17 watched an average of seven hours and 13 minutes of video per month on mobile phones in 4th quarter 2010, compared to an average of four hours and 20 minutes for all mobile subscribers, according to Nielsen.

Nearly half of all smartphone owners (48%) watch videos on their phones in a typical week, according to Google/Ipsos OTX Media CT. More than four in 10 (43%) visit video sharing websites on their smartphones, while 17% visit full-length TV programming websites.

Cable and Satellite Still Strong

Nearly nine in 10 U.S. households (88%) subscribe to a pay television service — 53% to cable, 32% to satellite, and 10% to fiber optic (some subscribe to more than one), according to the Consumer Electronics Association. Fewer than one in 10 (8%) get their TV service exclusively through antenna reception. More than three quarters (76%) say they're unlikely or very unlikely to cancel their pay TV service, and only 10% say they're likely or very likely to do so.

Despite the growing popularity of alternate screens, cable TV and satellite subscriptions have remained steady for the past five years, at about 90% of U.S. households, according to Edison and Arbitron. Even among monthly viewers of online streaming TV content, traditional television accounts for more than three hours of viewing per day — three hours, 11 minutes, compared to three hours, 43 minutes among the overall population.

SOURCES: "The Infinite Dial 2011: Navigating Digital Platforms," and "Television Ownership on the Decline: Are Americans 'Cutting the Cord?'" Edison Research and Arbitron. Edison Research, Steve Lemma, Research Coordinator, 6 W. Cliff St., Somerville, NJ 08876; www.edisonresearch.com. Price: Available online at no charge.

"State of the Media, TV Usage Trends: Q3 and Q4 2010," and "State of the Media, Trends in TV Viewing: 2011 TV Upfronts," Nielsen, Kathleen Mathus, Communications Analyst, Television, 770 Broadway, New York, NY 10003; 646-654-5000; kathleen.mathus@nielsen.com; www.nielsen.com. Price: Available online at no charge.

"comScore Video Metrix, April 2011," comScore, Stephanie Lyn Flosi, Sernior Marketing Communications Analyst, 233 S. Wacker Dr., #3400, Chicago, IL 60606; 312-777-8801; press@comscore.com; www.comscore.com. Price: Contact for information.

"Emerging Video Services V," Leichtman Research Group, Bruce Leichtman, President/Principal Analyst, 3 Ellison Ln., Durham, NC 03824; 603-397-5400; info@leichtmanresearch.com; www.leichtmanresearch.com. Price: Contact for information.

"The Mobile Movement: Understanding Smartphone Users, April 2011," Google/Ipsos OTX MediaCT. Ipsos OTX MediaCT, Tom Harbeck, SVP Strategy & Marketing, 275 Seventh Ave., #2001, New York, NY 10001; 212-524-8231; tharbeck@otxresearch.com; www.ipsos-na.com. Price: Available online at no charge: http://www.google.com/think/insights

"Cord Cutting and TV Service: What's Really Going On? May 2011," Consumer Electronics Association, Brian Markwalter, SVP of Research and Standards, 1919 S. Eads St., Arlington, VA 22202; 703-907-7600; info@CE.org; www.CE.org. Price: Available online at no charge.

Online Video Uptick

Some 178 million U.S. Internet users watched online video content in June, engaging in an all-time high of 6.2 billion viewing sessions during the month, according to comScore.

Viewers spent an average of 16.8 hours watching video in June, an increase of 16% from June 2010, when comScore measured an average viewing time of 14.5 hours.

As usual, Google sites, mainly YouTube, sit atop comScore's top-10 ranking of online video properties, attracting 149.2 million unique viewers in June. Notably, Amazon sites appear on the online video top-10 list for the first time, with the company's sites having garnered 21.2 million unique viewers and 43.2 million viewing sessions during the month.

The number of viewers made Amazon the tenth-most popular online video destination that month — right behind Hulu, which attracted 26.7 million users. But it's unclear whether Amazon's Instant Video service — its would-be competitor to Hulu and Netflix — drove the company's comScore ranking.

Whereas Hulu viewers spent an average 184.8 minutes (roughly 3 hours) watching TV shows and movies on the site during June, Amazon viewers spent an average of just 8.3 minutes watching video during the same time period.

TOP U.S. ONLINE VIDEO PROPERTIES BY UNIQUE VIDEO VIEWERS, JUNE 2011

Total U.S., Home/Work/University Locations

PROPERTY	TOTAL UNIQUE VIEWERS (000)	VIEWING SESSIONS* (000)	MIN. / VIEWER
Total Internet	178,447	6,255,493	1,008.3
1. Google Sites	149,281	2,311,116	324.1
2. Vevo	63,003	399,503	112.0
3. Yahoo! Sites	52,665	247,834	34.8
4. Microsoft Sites	50,663	286,892	32.8
5. Viacom Digital	49,493	274,933	76.8
6. Facebook.com	47,687	167,137	20.7
7. AOL, Inc.	43,915	251,987	49.3
8. Turner Digital	30,063	121,301	46.2
9. Hulu	26,701	156,939	184.8
10. Amazon Sites	21,247	43,193	8.3

NOTE: *A viewing session is defined as a period of time with continuous video viewing followed by a 30-minute period of video inactivity.

SOURCE: comScore Video Metrix

SOURCE: comScore, Andrew Lipsman, Senior Analyst, 500 W. Madison Ave., #2980, Chicago, IL 60661; 312-775-6510; alipsman@comscore.com; www.comscore.com.

Internet Video-On-Demand: iTunes Stays On Top; Vudu Rising

Despite a proliferation of competing services, iTunes' share of U.S. consumer spending for Internet video-on-demand and movie electronic sell-through increased to 65.8% during the first half of 2011, up slightly from 64.9% for the same period in 2010, according to IHS.

Among all online movie providers, iTunes experienced the largest revenue increase during the first half. IHS attributes iTunes' success chiefly to the rising consumer usage of Apple's AirPlay system, which allows wireless video streaming to televisions and other consumer electronics. Other contributing factors include the rising adoption of iPads (and their usage for video streaming).

Meanwhile, Vudu's share of electronic sell-through and Internet video-on-demand movie revenue rose to 5.3% in the first half of 2011, up from 1% during the same period in 2010. Vudu owner Walmart has upped its promotion of the service, which also features rental pricing that is competitive with automated DVD kiosks (at $1 or $2 per day).

Vudu's gain spelled losses for both Microsoft's Zune Video Marketplace, whose share of the market declined during the first half of 2011 to 16.2 % (down from 18.5% during the same period in 2010); and for Sony's PlayStation Store, whose share declined to 4.4% (from 8.2% in the prior-year period). Amazon stands as the fifth most popular online movie service, with a 4.2% share of the electronic sell-through and Internet video-on-demand market.

SOURCE: iSuppli (IHS), Debra Jaramilla, Manager Marketing, 310-524-4047; djaramilla@isuppli.com; www.isuppli.com.

Video Sharing Sites Attract Rural Internet Audience

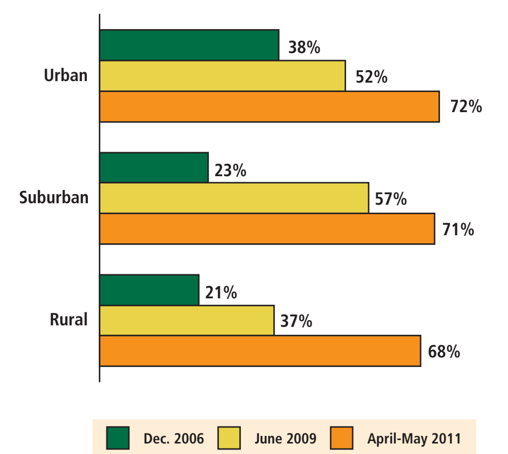
Rural Internet users are now just as likely as online adults in urban and suburban areas to have sampled videos at YouTube, Vimeo, and other video sharing sites, according to the Pew Research Center's Internet & American Life Project. Some 68% of rural Internet users have visited such sites, compared with 72% of urban Internet users and 71% of online suburbanites. The research center notes that the differences between the percentages are statistically insignificant.

However, rural Internet users still are less likely to visit video sharing sites on a typical day (14%) than either urban Internet users (33%) or online suburban adults (31%).

Among all Internet users, those age 18-29 are most likely to have visited video sharing sites (92%) and most likely to do so on a typical day (47%).

VISITS TO VIDEO SHARING SITES, BY RESIDENTIAL AREA

Percentage Of Online Adults Who Have Visited Such Sites



NOTE: n=2,277 adult Internet users age 18 and older. Most recent interviews were conducted in English and Spanish April 26, 2011 – May 22, 2011; respondents include 755 cell phone interviews.

SOURCE: Pew Research Center Internet and American Life Project

SOURCE: Pew Research Center, Internet & American Life Project, Aaron Smith, Sr. Research Specialist, 1615 L St. NW, #700, Washington, DC 20036; 202-419-4500; asmith@pewinternet.org; www.pewinternet.org.

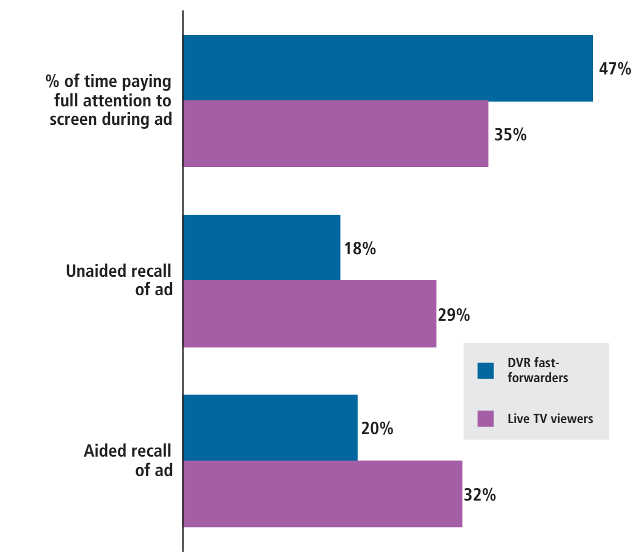
Online Video Earns Closer Attention Than TV

Consumers watching online videos (60%) are more likely than those watching TV (52%) to pay full attention to the content, according to IPG Media Lab and YuMe. When ads come on TV, the proportion of viewers paying full attention drops 29% (calculations by Research Alert). Online video viewers' attention drops only 8%. More than half of online video viewers (55%) pay attention to video ads during their programs, compared with 37% of TV viewers.

Viewers fast-forwarding through ads while watching on DVR pay closer attention to the ads than those watching live video, but they're less likely to remember them. While there are no significant gender differences in attention to ads, women are more likely than men to remember video ads unaided, whether on TV or online. Online video viewers have higher recall of brands seen in online video ads than TV viewers do of brands in TV ads.

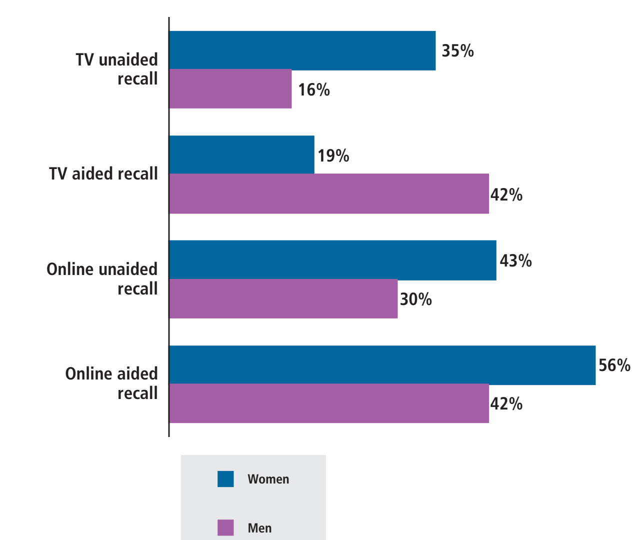
SOURCE: "Advertising Attention in the Wild — A Comparison of Online and Televised Video Advertising, May 2011," IPG Media Lab and YuMe. IPG Media Lab, Brian Monahan, EVP, Managing Partner, 5700 Wilshire Blvd., #452, Los Angeles, CA 90036; 323-930-3500; brian.monahan@ipglab.com; www.ipglab.com. YuMe, Ed Haslan, SVP Marketing, 1204 Middlefield Rd., Redwood City, CA 94063; 650-591-9400; yume_info@yume.com; www.yume.com

ATTENTION TO AND RECALL OF TV ADS, PEOPLE WHO FAST-FORWARD THROUGH ADS ON DVR VS. WATCH LIVE TV



SOURCES: IPG Media Lab and YuMe

RECALL OF TV AND ONLINE VIDEO ADS BY GENDER



SOURCES: IPG Media Lab and YuMe

Online Video Viewing Is Growing Fast

Nearly half (49%) of those who watch online videos watch on a daily basis, according to a YuMe study of U.S. teens and adults ages 13-54 who watch at least once a week. Two thirds (66%) say they're watching more often now than they did a year ago, and 48% expect to watch even more in 2011.

DEMOGRAPHIC PROFILE OF ADULTS WHO ARE WATCHING MORE ONLINE VIDEOS THAN THEY DID 12 MONTHS AGO (FEBRUARY 2011)

78% are ages 35-54
70% are female
65% have no children at home
51% have college degrees or more education
50% are unmarried

SOURCE: YuMe

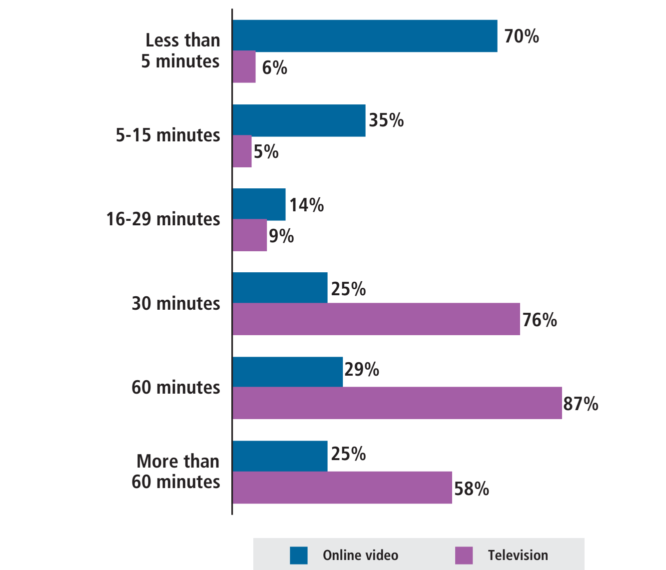
While the mean time spent watching online videos is about an hour a day (7 hours per week), most are watching a series of short videos rather than one or two long ones.

Flexibility is a big part of the appeal of online video; 60% of viewers say they watch because it allows them to watch videos whenever they want to, and 50% like to watch television programs online that they've missed during the regular TV broadcast.

Online video viewers are less likely to multitask when they're watching online than when they're watching traditional television. They're also less likely to skip ads during an online video than they are while watching recorded television programs: 29% say they skip ads on online video 75% or more of the time, while 49% say they skip ads on recorded TV 75% or more of the time.

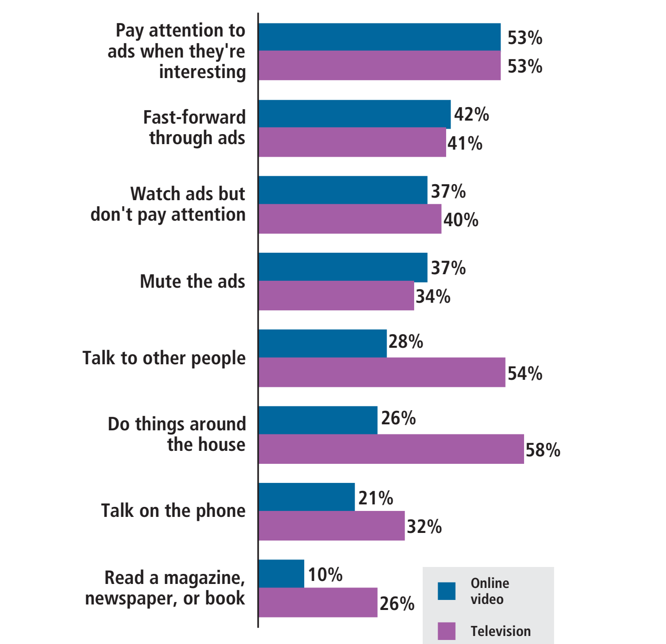
Online video appears to have moved beyond early adopters and is being embraced by mainstream adults (see profile).

LENGTH OF VIDEOS WATCHED AT LEAST ONCE A WEEK, ONLINE VS. TV



SOURCE: YuMe

BEHAVIOR DURING ADS ON ONLINE VIDEO VS. TV



SOURCE: YuMe

SOURCE: "Online Video and Television Viewing Attitudes and Behaviors," February 2011, YuMe, Ed Haslam, SVP, Marketing, 1204 Middlefield Rd., Redwood City, CA 94063; 650-591-9400; getresults@yume.com; www.yume.com. Price: Free download.

Webisodes: What Makes A Successful Online Video Series — And Effective Ways To Utilize Online Content

Everyone in the entertainment industry is able to easily recite the most popular and successful online series: *Prom Queen*, backed by Michael Eisner's Vuguru, attracted more than 11 million views. Alloy Media & Marketing's *Private* Web series received 14 million views. *LonelyGirl15* garnered more than 100 million views throughout its run.

Every day yet another production company announces its intentions to develop online content specifically for a young audience. Yet the concept of online video creates confusion among interested brand marketers who struggle to understand:

- What makes a successful series;
- The most effective ways to utilize online content;
- And whether it's a viable or profitable opportunity.

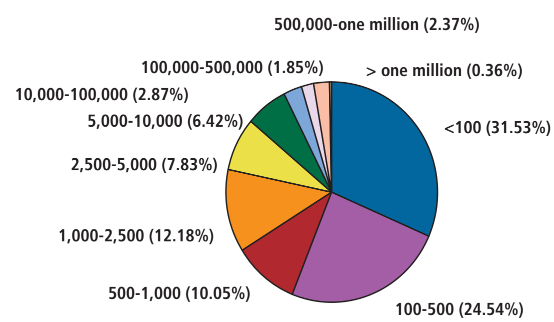
The Fundamentals

The most common types of online videos are branded and viral. "The bulk of the views [are less for] professionally-produced branded Web series and more for those created by independent producers, like Fred," who averages almost 700,000 views per day, says TubeMogul's David Burch. "These are often 'branded' in the sense that they do brand integration deals and larger media appearances."

In general, viral videos are relatively inexpensive to develop with expenses totaling less than $5,000; branded online series cost $50,000-$1 million for about eight episodes. There's no consensus on length — some advise each episode not should exceed two minutes — but each clip needs to immediately catch a viewer's attention. Two in 10 viewers (19%) click away within the first 10 seconds, according to Visible Measures. Videos tend to have short lifecycles. A typical video receives 75% of its total 90-day views within 20 days, and half of its views in six days, according to TubeMogul.

"The idea that viewers are just going to find your show organically is as likely to happen as lightning striking you," says Visible Measures Matt Cutler. However, there are a few

YOUTUBE VIDEOS, BY NUMBER OF VIEWS



SOURCE: TubeMogul

factors that increase the likelihood of attracting millions of viewers:

Benchmark. Before a brand even sets up a camera, Cutler recommends setting metrics, including what it expects to achieve and total number of viewers "I advise [brands] set a relatively aggressive target. From a brand perspective, one million exposures seems to be the threshold, though it's hard to [accomplish]."

Most companies view online videos as ways to build brand loyalty, to introduce or to "test" a property, or to gain enough traction (and audience) to sell rights to TV or DVD. As of now, online videos are not a profitable end-all. Even Alloy Media & Marketing, which produces numerous online series using financial support from advertisers, doesn't break even on its programs, reports Bloomberg.

Humor And Surprise. Young viewers tend to flock to online videos that are irreverent, humorous, or unexpected. "Most people have seen everything these days, so they are totally psyched to see something they haven't [seen] before," says Cutler. Music video parodies and animated clips also tend to attract younger viewers, while celebrities aren't as helpful. "Celebrities can initially drive interest, but [traffic] tends to only come from their fanbase," says Cutler.

Remember, It's Not TV. Brands cannot transfer ad-driven TV content directly to the Internet. Each comes with a completely different advertising model and creative experience. Importantly, online viewers prefer to communicate with others, typically while watching the clip or immediately after. This means brands need to develop online forums or communities to facilitate this dialogue. "The most successful videos leave room for a conversation. They don't spell it out, but leave things open-ended," says Cutler.

Support Strategy. The relatively few viral success stories highlight the fact that it takes work to build and execute a Web series. It's non-negotiable that brands complement a web series with paid advertising, including offline and online effort. This support must drive initial traffic to the site and help maintain its visibility throughout the series' run. Half of video streams (52%) are discovered via direct traffic, says TubeMogul, which means viewers are specifically navigating to select videos. Google is the largest external source of traffic (39%), followed by Yahoo! (6%), Bing (2%), and Facebook (0.40%).

Frequency. Viewers have short attention spans so it's crucial that new videos are constantly uploaded. "Weekly is better than monthly, which is better than seasonally," says Cutler. There's no firm rule on when videos should debut: some believe summer months are best when students aren't in school, while others feel weekends are better. The only critical component is sticking with a set time schedule so viewers know when to tune in.

PERCENTAGE OF VIEWERS WHO ABANDON WATCHING ONLINE VIDEOS, BY VIEWING TIME

10 seconds	19%
30 seconds	33%
60 seconds	44%
90 seconds	53%
120 seconds	59%

SOURCE: Visible Measures

Jump In Front Of A Parade

While many brands relish the opportunity and the control that comes with creating their own series, analysts advise companies "find a parade and jump in front of it," which means to align with an already established online series. "There are many people who already have a large following. Find one that is relevant to your brand and set up a financial relationship," says Cutler.

There are many options when exploring this type of endeavor, ranging from overt product placement to discreetly placing a logo at the bottom of the screen.

If companies are willing to be the brunt of a joke, Cutler suggests they work with BlendTec, maker of $500 blenders. Its popular online series features the CEO "blending" popular items in its machines, such as an iPad or iPhone. Each clip receives around one million views, and the going-rate for brand placement is $10,000, says Cutler.

SOURCES: Alloy Media and Marketing, Sean Horvath, EVP Sales and Entertainment, 6300 Wilshire Blvd., #2150, Los Angeles, CA 90048; 323-937-7070; shorvath@alloymarketing.com; www.alloymarketing. com. Also, Jodi Smith, VP Public Relations, 212-329-8359; jsmith@alloymarketing.com.

TubeMogul, Communications Director, 1250 53rd St., #6, Emeryville, CA 94608; 510-653-0501; david@tubemogul.com; www.tubemogul.com.

Visible Measures, Matt Fiorentino, 25 Kingston St., 5th Fl., Boston, MA 02111; 617-482-0222; mfiorentino@visiblemeasures.com; www.visiblemeasures.com. Also, Matt Cutler, mcutler@visiblemeasures.com.

Social Network Usage Tops 90% Of Online Adults

Nine in 10 U.S. Internet users visit social networking sites every month, according to comScore. The average Internet user spent 4.5 hours on social networking sites each month in 2010. Social networking accounts for 15.6% of total time spent online by global Internet users ages 15 and older and 14.4% of time spent by U.S. users.

Women are more active social networkers than men. Women spent 16.8% of their online time on social networking sites in December 2010 (up 4.5 percentage points from December 2009). Men, in comparison, spent 12.0% of their online time on social networking sites during the same month (up 2.9 points year-over-year).

Facebook is by far the most popular social networking site, accounting for 10% of page views to any type of site by U.S. Internet users in 2010. Three in 10 online sessions included a visit to Facebook, and the site's unique visitors climbed to 153.9 million in the U.S. alone as of December 2010 (up 38% from 2009).

Demographics of Facebook and Twitter users changed between 2009 and 2010. The proportion of Facebook users between the ages of 35 and 54 dropped from 39.0% to 35.4%, while the shares of users below age 18 and those age 55 and older grew.

Twitter's user profile shifted to nearly half 18-34-year-olds (46.6%), up from 37.2% in 2009. Only 9.5% were under 18 in 2010, down from 17.5% — partly, comScore believes, due to increasing numbers of younger users accessing the site via mobile or third-party Twitter apps that are not included in the tracking.

Online Video Viewing Trends

Online video viewing grew significantly during 2010: 179 million Americans watched each month, and 88.6 million watched on an average day in December 2010 (up 32% from 67.3 million in December 2009).

The average U.S. Internet user spent more than 14 hours watching online video in December 2010, up by 10% from 12.7 hours in December 2009.

Online viewing from laptop computers grew 45% between January 2010 and January 2011, according to Nielsen. Most of this growth was due to heavier viewing by existing users; the number of viewers grew only 3% during this time. Viewers streamed an average of 101 videos in January 2011, up 28% from 2010.

YouTube was the top video streaming destination in terms of numbers of total videos streamed — nearly 8.5 million in January 2011. Viewers spent the most time watching videos streamed from Netflix — an average of 11 hours, 8 minutes per person in January 2011. That is not surprising, given that most videos on YouTube are short, while most Netflix streams are of full-length movies or TV show episodes.

SOURCES: "U.S. Digital Year in Review, 2010," comScore, Sarah Radwanick, 316 Occidental Ave. S., #200, Seattle, WA 98104; 206-268-6310; press@comscore.com; www.comscore.com.

"January 2011: Online Video Usage Up 45%," Nielsen, Matthew Hurst, Online Communications Analyst, 770 Broadway, New York, NY 10003; 646-654-5000; matthew.hurst@nielsen.com; www.nielsen.com.

Two Thirds Of Online Adults Use Social Networks; Fastest Growth Is Boomers

Nearly two thirds of Internet users ages and 18 and older (65%) use social networking sites, up from 61% in 2010, according to the Pew Internet and American Life Project. Half of all adults overall (50%) use them.

On a given day, 43% of online adults are on social networks, up from 38% in 2010. Only email (61%) and search engines (59%) are used by more people on a typical day.

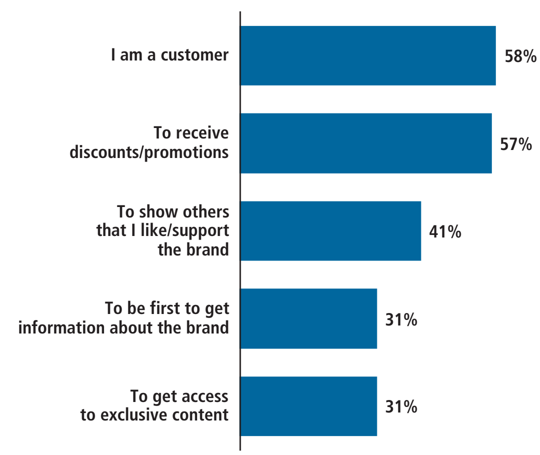
Online women ages 18-29 are most likely to use social networks — 89% have ever used them, and 69% use them on a typical day.

There are strikingly few differences in social network usage by race or income level.

Although use of social networks is most widespread among 18-29-year-olds, it's growing fastest among Boomers. The proportion of 50-64-year-olds using social networks on a typical day grew 60% between May 2010 and May 2011, compared to 18% growth among 30-49-year-olds and no growth among 18-29-year-olds.

Social networks account for 23% of all time Americans spend on the Internet, according to Nielsen. Facebook is not only the most widely used social network; it's also the most visited site on the Internet. U.S. Internet users spent 53,457,258 minutes on Facebook in May 2011, more than on any other branded website (excluding time spent watching online video).

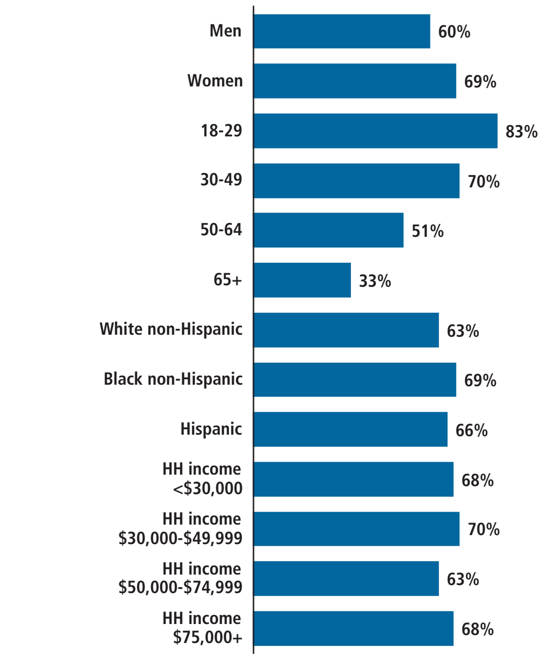
TOP REASONS CONSUMERS GIVE FOR BECOMING FANS OF BRANDS ON FACEBOOK



SOURCE: Chadwick Martin Bailey

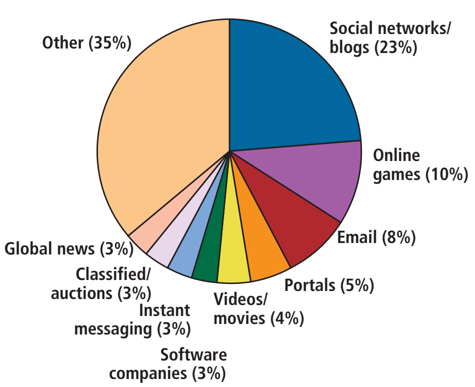
SOCIAL NETWORK USERS

(% of online adults in each group who have ever used social networks)



SOURCE: Pew Internet and American Life Project

HOW ONLINE AMERICANS DIVIDE THEIR INTERNET TIME



SOURCE: Nielsen

More than half of online Americans ages 18 and older spend at least an hour per week on Facebook, according to Chadwick Martin Bailey.

Who's Using Social Apps

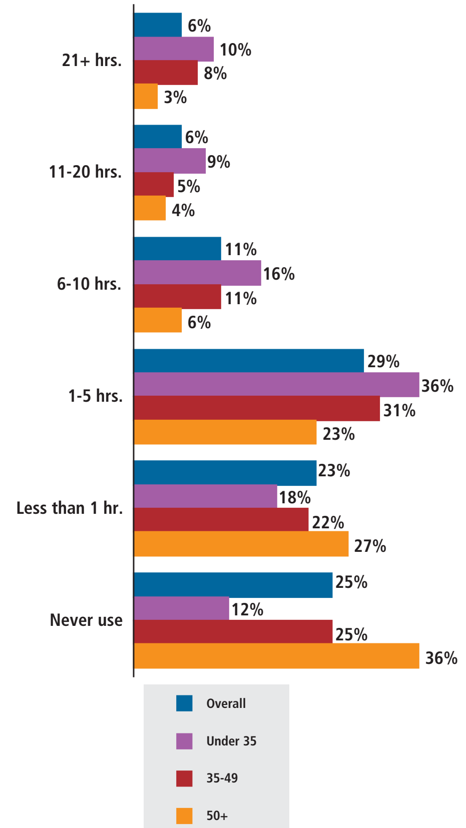
Almost four in 10 social media users (37%) access social networks from their mobile phones, according to Nielsen. Usage of social networking apps has grown 30% since the third quarter of 2010. Facebook is the most widely used social networking app. LinkedIn skews oldest: 34% of LinkedIn app users are age 45 or older.

Six in 10 smartphone app users (60%) have downloaded at least one social networking app — they're second in popularity only to game apps (67%) and weather apps (65%). Women are more likely than men to watch video on social networking sites, but men who do watch video spend more time viewing.

Facebook Fans

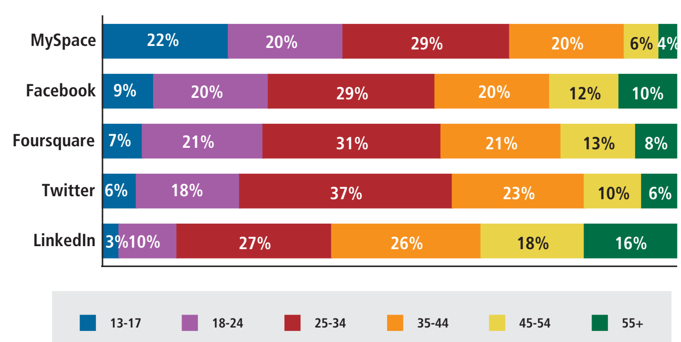
More than half of Internet users 18-34 (56%) interact with their favorite brands on Facebook, according to Chadwick

HOW MUCH TIME AMERICANS SPEND ON FACEBOOK EACH WEEK, BY AGE



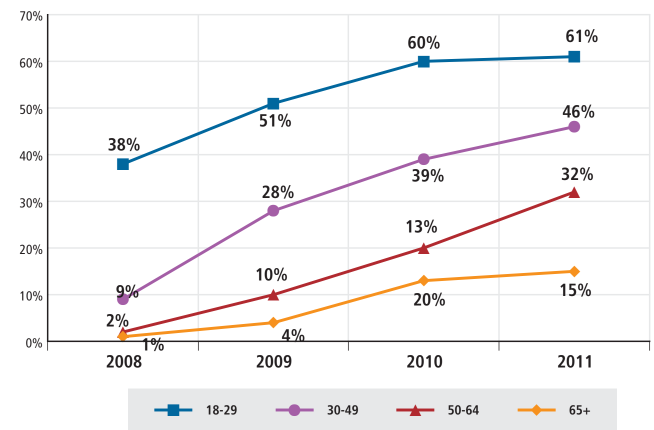
SOURCE: Chadwick Martin Bailey

AGE DISTRIBUTION OF SOCIAL NETWORK APP USERS



SOURCE: Nielsen

GROWTH IN USE OF SOCIAL NETWORKS, BY AGE, 2008-2011



SOURCE: Pew Internet and American Life Project

Martin Bailey. Among Facebook users 18 and older who are fans of brands, 77% read the brands' posts, news feeds, and/or posted offers. Fewer share their experiences with the brand or tell others about brand news (17%) or post about the brand (13%). More than three quarters of fans (76%) have never changed their minds and "unliked" a brand once they became fans.

Becoming a fan of a brand on Facebook tends to make consumers more likely to recommend the brand to friends (56% say they're more likely), and more likely to buy that company's products (51%).

SOURCES: "65% of Online Adults Use Social Networking Sites," Pew Internet and American Life Project, Mary Madden, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; info@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

"State of the Media: The Social Media Report, Q3 2011," Nielsen, Matthew Hurst, Communications Analyst, Online, 770 Broadway, New York, NY 10003; 646-654-5000; matthew.hurst@nielsen.com; www.nielsen.com. Price: Available online at no charge.

"2011 Chadwick Martin Bailey Consumer Pulse," Chadwick Martin Bailey, Kristen Garvey, VP Marketing, 179 South St., 3rd Fl., Boston, MA 02111; 617-350-8922; www.cmbinfo.com. Price: Selected data available online at no charge.

Social Media Are Becoming Mainstream; Facebook Is Most Widely Used But Twitter Is Growing Fastest

Social networking is becoming an increasingly mainstream activity. Contrary to media portrayals of digital interactions as isolating, active social networkers are more likely than others to have strong support networks.

Moving Into Mainstream

Nearly six in 10 online adults (59%) use social networking, an increase of 74% since 2008, according to the Pew Internet and American Life project (calculations by Research Alert). Social networking is growing fastest among adults over 35, nearly half of whom (48%) use social networks, more than double the 18% who did in 2008. In 2008, 68% of social network users were between the ages of 18 and 35; by 2010, more than half (52%) were 36 or older.

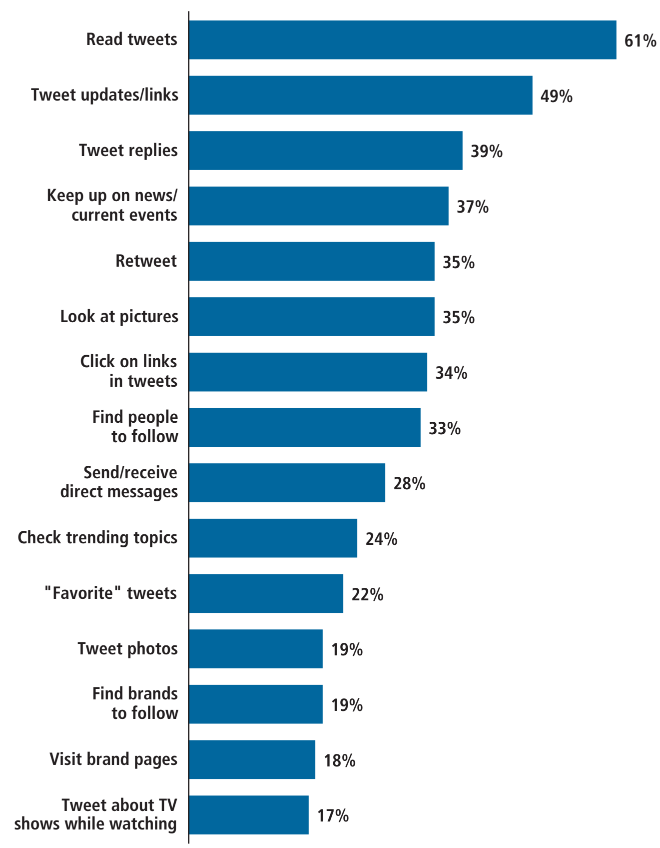
Who Uses Which Network

Women make up the majority of social network users (56%, up from 53% in 2008), with the exception of LinkedIn, which is used by more men than women. Facebook is by far the most widely used social network; 92% of social network users have Facebook accounts. Just under three in 10 (29%) are on MySpace, 18% are on LinkedIn, and 13% are on Twitter. Facebook and Twitter users are most actively engaged with the sites: 52% of Facebook users log on daily, as do 33% of Twitter users. Only 7% of MySpace users and 6% of LinkedIn users log on daily.

Women Lead Facebook

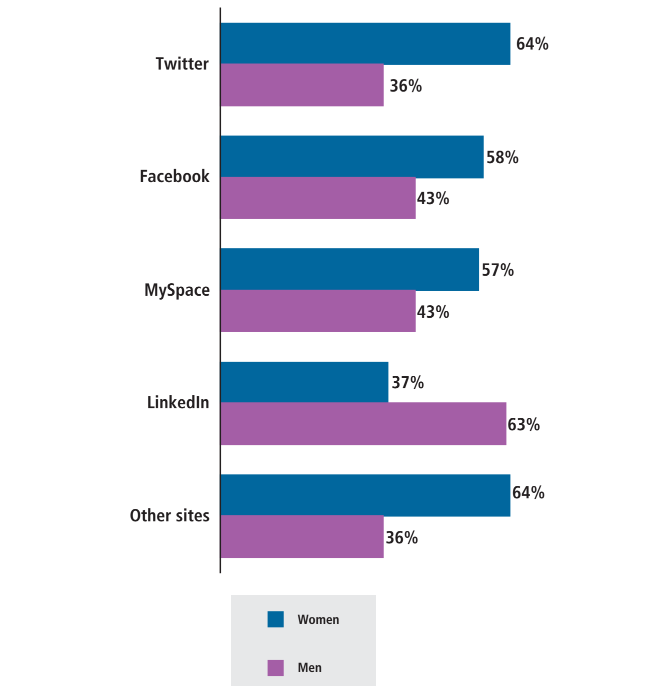
Women who are on Facebook post status updates more frequently than men do: 18% of women post once a day or more, compared to 11% of men. Almost a third of Facebook

TWITTER USERS' ACTIVITIES
(% who ever do)



SOURCE: Compete

GENDER DISTRIBUTION OF SPECIFIC SOCIAL NETWORKS



SOURCE: Pew Internet and American Life Project

users ages 18-22 (31%) post status updates at least once a day.

Facebook users comment on other people's status updates more frequently than they post their own. More than half (53%) of Facebook users comment on other users' posts at least once a week, and 22% comment at least once a day, compared to 44% who post their own updates at least once a week, and 15% who post once a day or more.

Virtual And "Real-Life" Friends

The average Facebook user has 229 friends on the site; many of these are people with whom he or she might otherwise lose touch. Facebook users have met 93% of their Facebook friends in person, however. Four in 10 Facebook users (40%) have friended all of their closest "real-life" friends on the site, up from 29% who had done so in 2008.

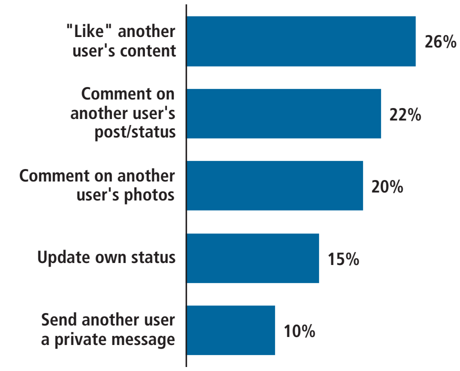
In general, Facebook makes its users feel more socially connected and supported. People who visit Facebook several times daily have 9% more friends they consider their core confidants than other Internet users do. They're also more likely than other Internet users to receive emotional support and/or tangible help (such as someone to take care of them when they're sick), and to have people to spend time with.

Internet users (46%) and social networkers (45%) are more likely than non-Internet users (27%) to feel that most people can be trusted. Facebook users who visit the site several times a day are 43% more likely than other Internet users and three times more likely than non-Internet users to feel this way.

Twitter Users Are Highly Connected

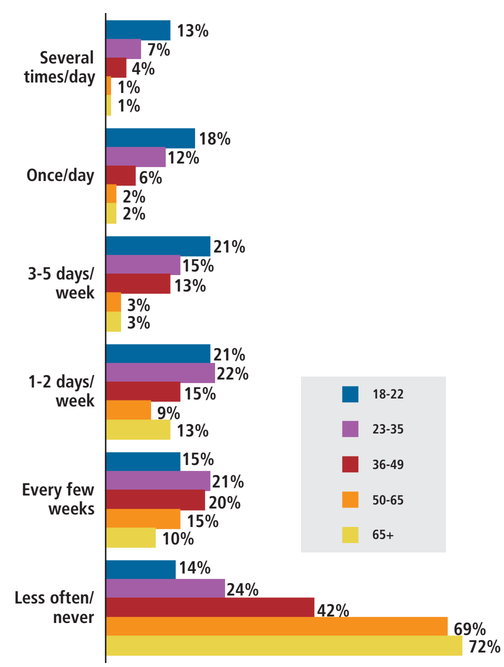
Twitter users are more likely than users of other social media to log in via mobile devices, according to Compete. More than four in 10 Americans who use Twitter (43%) access the site through cell phones or smartphones and 9% through tablets, compared to 34% and 7%, respectively, of Facebook users and 9% and 4% of LinkedIn users (the study did not look at MySpace users). Pew finds an even higher proportion of Twitter users accessing the site via mobile: 54% of users with cell phones or smartphones access the site on them.

WHAT FACEBOOK USERS DO ON A TYPICAL DAY



SOURCE: Pew Internet and American Life Project

HOW OFTEN FACEBOOK USERS POST STATUS UPDATES, BY AGE



SOURCE: Pew Internet and American Life Project

Although the numbers of people using Twitter are still relatively small, the site is growing fastest among the social networks studied by Pew. Twitter use among 25-34-year-olds doubled between November 2010 and May 2011 (from 9% to 19%). Twitter users and MySpace users are more racially and ethnically diverse than users of Facebook and LinkedIn.

Twitter users are much more active than overall adults in online social activities, according to GfK MRI: They're 506% more likely to write blogs; 451% more likely to upload videos; and 314% more likely to post reviews or comments on blogs, message boards, and other forums. They're also 209% more likely to be published writers and 269% more likely to own e-readers. Conversely, owners of e-readers are more likely than the average adult to be active on social networking sites in general, including Facebook, Twitter, and LinkedIn.

More than half of Twitter users who follow a brand (56%) and 47% of Facebook users who "like" a brand say they're more likely to buy that brand's products after signifying their allegiance. More than six in 10 (62% of Twitter users and 60% of Facebook users) say they're more likely to visit the brand's website; 59% of Twitter users and 55% of Facebook users are more likely to recommend the brand to others after following/liking it, according to Compete.

Consumers' top reasons for following or liking brands are to learn about discounts and promotions and to get free stuff. Twitter users are more likely than Facebook users to followa brand because they want product updates, to stay informed about the company, to interact with the company, or purely for fun.

SOURCES: "Social Networking Sites and Our Lives," June 16, 2011, and "13% of Online Adults Use Twitter," June 1, 2011, Pew Internet and American Life Project, Lee Rainey, Director, and Aaron Smith, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; info@pewinternet.org; www.pewinternet.org. Price: Available online at no charge.

"Four Things You Might Not Know About Twitter," June 13, 2011, Compete Pulse, Compete Inc., Cynthia Stevens, Director of Marketing, 4 Copley Pl., #700, Boston, MA 02116; 617-933-5600, x5651; cstevens@compete.com; www.competeinc.com. Price: Available online at no charge: http://compete.com/newsletter/

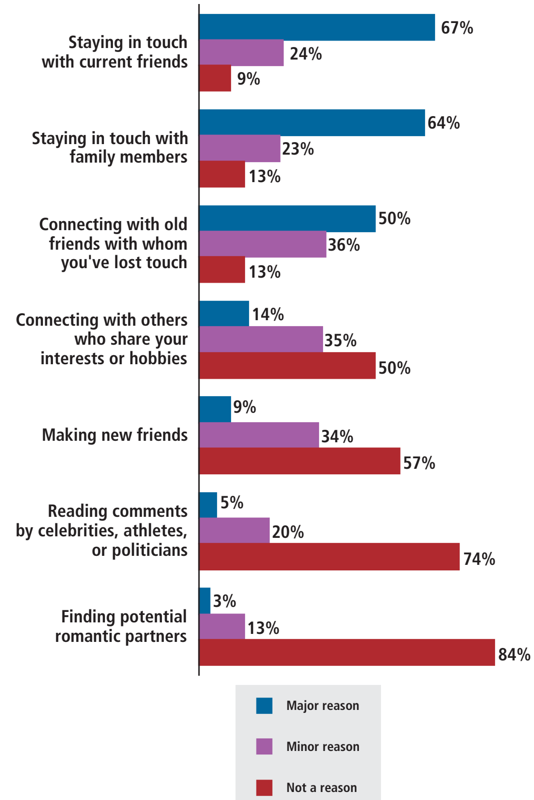
"Survey of the American Consumer, Spring 2010," GfK MRI, Anne Marie Kelly, SVP Marketing and Strategic Planning, 75 Ninth Ave., New York, NY 10011; 212-884-9204; Annemarie.kelly@gfkmri.com; www.gfkmri.com. Price: Contact for information.

Social Media Is Used To Keep In Touch Rather Than To Meet New People

Americans use social media primarily to stay in touch with family members and friends they already have, rather than to make new friends, find romantic partners, or connect around shared hobbies, according to the Pew Research Center. Two thirds of online adults 18 and older (66%) use social media.

Women are more likely than men to cite staying in touch with family members (72% vs. 55%) and with current friends (70% vs. 63%) as chief reasons for using social networks. Parents are more likely than adults without children to cite connecting with old friends as a significant reason for using these networks (56% vs. 47%).

WHY AMERICANS USE SOCIAL NETWORKING SITES



SOURCE: Pew Research Center

Social networkers ages 50-64 are more likely than those ages 18-29 to say connecting with others who share their interests or hobbies is a major reason they use the networks (18% vs. 20%).

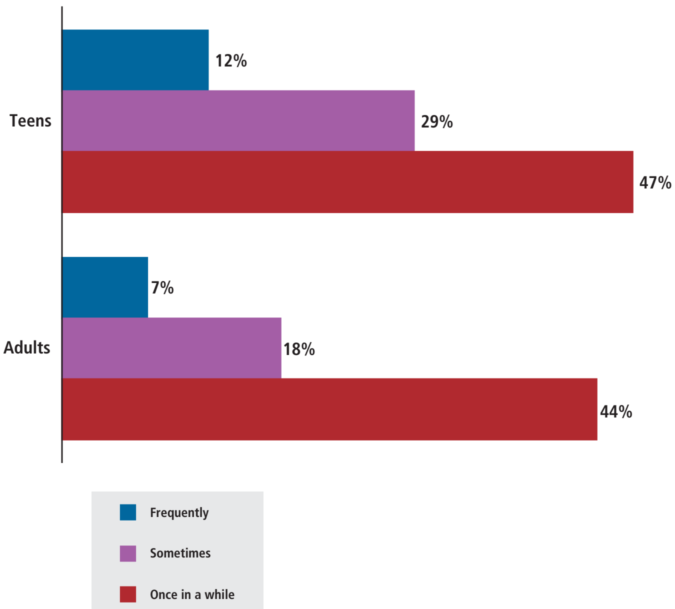
Blacks and Hispanics are more likely than non-Hispanic Whites to use social media to read comments by celebrities, politicians, or athletes: 10% of Blacks and 11% of Hispanics cite it as a major reason, compared to 3% of Whites. Another 31% of Blacks and 26% of Hispanics cite this as a minor reason, compared to 16% of Whites.

Social Networks Are (Mostly) Nice Places

Almost all U.S. teens (95%) are Internet users, and of these, 80% use social networks, according to a separate study by Pew. For the most part, teens have positive views of their experiences on social media: 69% say their peers are mostly kind to one another when interacting on the sites.

Two in 10 say teens are primarily unkind to one another, and 11% say it depends on the situation. By comparison, 85% of adults believe people are primarily kind in their interactions on social networks, while 5% believe they're mostly unkind.

HOW OFTEN TEENS AND ADULTS WITNESS CRUEL BEHAVIOR ON SOCIAL NETWORKS



SOURCE: Pew Research Center

Nearly nine in 10 teens (88%) say they've witnessed cruel behavior among teens on social network sites at some point, compared to 69% of adults who've seen such behavior among their contemporaries. More than one in 10 teens (15%) say they themselves have been treated cruelly by someone on a social network in the past year.

SOURCE: "Why Americans Use Social Media," Pew Internet and American Life Project, Pew Research Center, Aaron Smith, Senior Research Specialist, 1615 L St., NW, #700, Washington, DC 20036; 202-419-4500; info@pewinternet.org; www.pewinternet.org

Social Networks, TV Sites On The Rise With Online Consumers

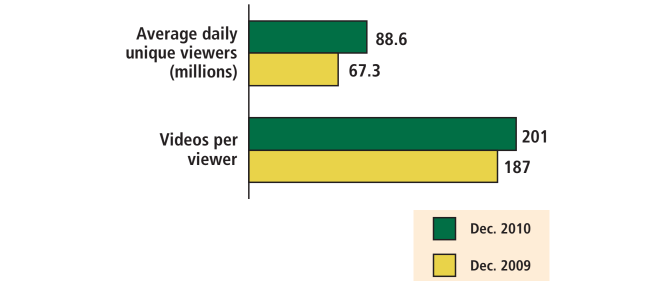
Social networking currently claims a larger share of online consumers' time than entertainment, according to comScore's annual review of digital media markets. But the rise of online TV sites and services may change the balance in 2011.

Entertainment as a category claims 12.6% of consumers' time online, up 0.8 percentage points from a year ago. Social networks' share rose 3.8 percentage points during 2010, claiming a 14.4% share.

Online video posted double-digit growth in 2010, both in terms of viewership and time spent. Online video sites and services claimed some 88.6 million daily unique users in December 2010, a 31% increase from December 2009. Within this category, both Hulu and television networks' own sites posted gains in the time consumers spend with them.

In the fourth quarter of 2010, Hulu itself accounted for 323 million hours of online TV viewing, up 17% from the previous year. Meanwhile, time spent on the sites of the five major broadcast networks (ABC, CBS, CW, Fox, and NBC) rose 82% year over year to 162 million hours in Q4. The total combined time spent viewing online TV on Hulu and the five network sites grew by 33% in 2010 over the prior year.

GROWTH IN U.S. ONLINE VIDEO MARKET, 2009-2010



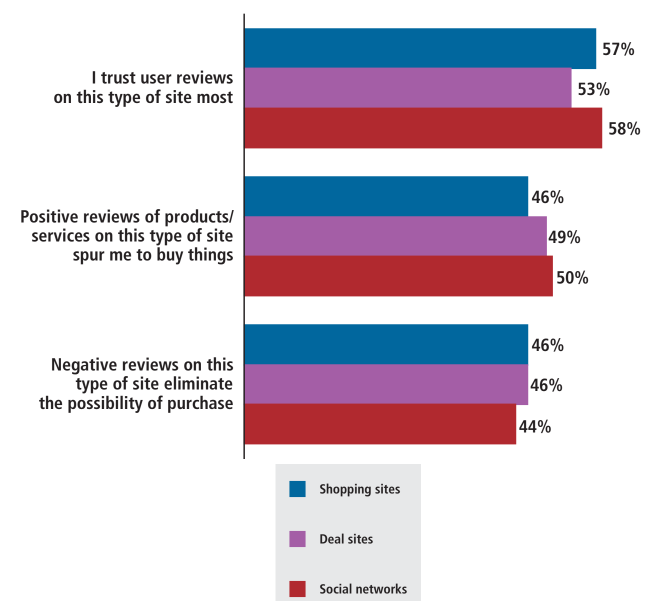
SOURCE: comScore Video Metrix

SOURCE: "The 2010 U.S. Digital Year In Review," comScore, Sarah Radwanick, Marketing Communications Manager, 316 Occidental Ave. S., #200 & 310, Seattle, WA 98104; 206-268-6310; www.comscore.com.

Social Networks Are Source Of Product Research And Reviews

Two thirds of active social network users (66%) use these sites in the early stages of product research, according to Performics/ROI Research. More than half use them to share their experience after purchasing and/or to check in with

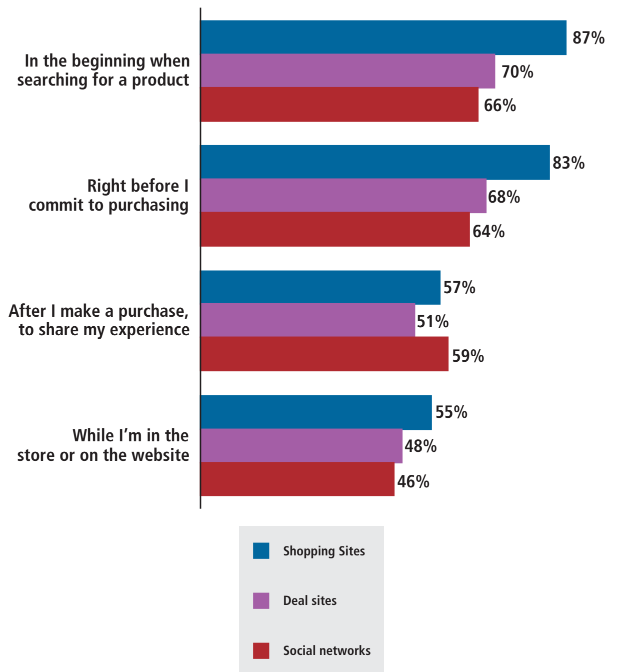
INFLUENCE OF ONLINE REVIEWS ON SHOPPING DECISIONS



SOURCE: Performics/ROI Research

HOW CONSUMERS USE SHOPPING SITES, DEAL SITES, AND SOCIAL NETWORKS DURING THE SHOPPING PROCESS

(% who use frequently or occasionally)



NOTE: Sample is active users of social networks.

SOURCE: Performics/ROI Research

their contacts before they commit to buying an item. Nearly two in 10 social network users visit deal sites (19%), social networks (18%), or shopping sites (17%) daily in search of coupons and deals.

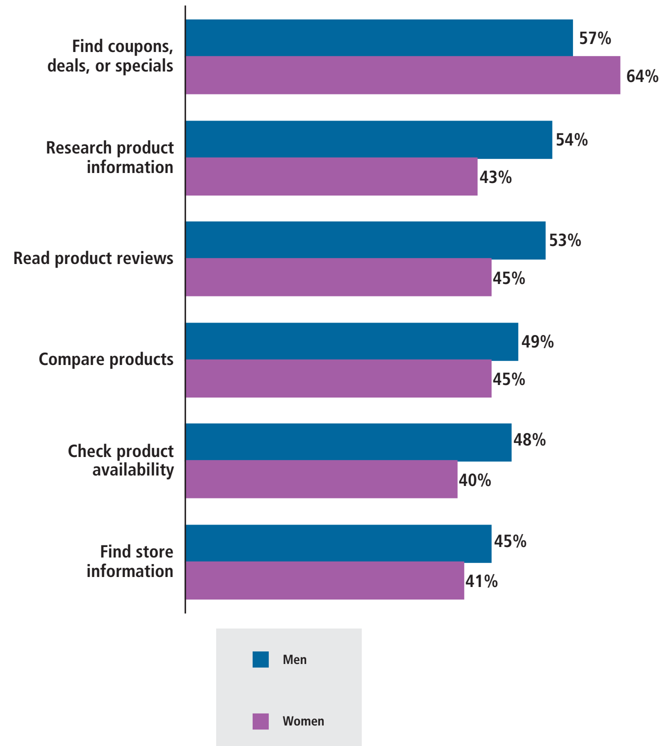
Men are more likely than women to use social networks for researching products and reading reviews; women are more likely to use them for finding coupons or deals.

More than two thirds of social network users (68%) visit company, brand, or product pages on social networks at least occasionally as part of their shopping process. Men are more likely than women to do so (71% vs. 64%). More than seven in 10 social network users (78% of women and 72% of men) "like" a company, brand, or product after making a purchase (frequently or occasionally). More than eight in 10 18-29-year-olds (82%) and 30-49-year-olds (80%) "like" companies/brands/products on Facebook after making purchases, compared to 64% of those 50 and older who do so.

Consumer feedback has a significant impact on purchase decisions; more than four in 10 active social network users say seeing negative reviews on shopping, deal, or social sites eliminates any possibility that they will purchase the item. More than seven in 10 social network users (72%) feel that shopping sites are an important part of the purchase process, compared to 58% who consider deal sites important and 41% who consider social networks important.

HOW MEN AND WOMEN USE SOCIAL NETWORKS FOR SHOPPING

(% who use once a week or more)



NOTE: Sample is active users of social networks.

SOURCE: Performics/ROI Research

SOURCE: "Gender Inequity: Social Network, Shopping, & Deal Site Behavioral Differences," October 2011, Performics and ROI Research. Performics, Dana Todd, SVP Marketing and Business Development, 111 E. Wacker Dr., #1500, Chicago, IL 60601; 312-739-0222; info@performics.com; www.performics.com. Price: Available online at no charge.

ROI Research, Christine Kurtz, Director of Analytics, 48-50 W. Chestnut St., #300, Lancaster, PA 17603; 717-435-1850; information@roiresearch.com; www.roiresearch.com

Facebook Users "Like" Frequently But Want Rewards And Privacy

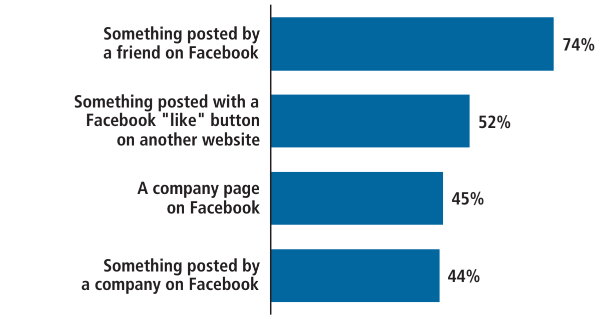
More than nine in 10 Facebook users (93%) click the "like" button at least once a month, according to Exact Target. The most common activity is "liking" something posted by a Facebook friend.

Facebook users ages 25-34 are more likely than other users to "like" 11 or more companies. The more companies a consumer "likes," the greater his/her expectations of getting rewards for doing so. Older Facebook users also expect more significant rewards for "liking" companies than younger Facebook users do; those ages 35-51 have the highest expectations, while 18-26-year-olds have the lowest.

Not all Facebook users who "like" a brand on the site (or on another site) are giving the company blanket permission

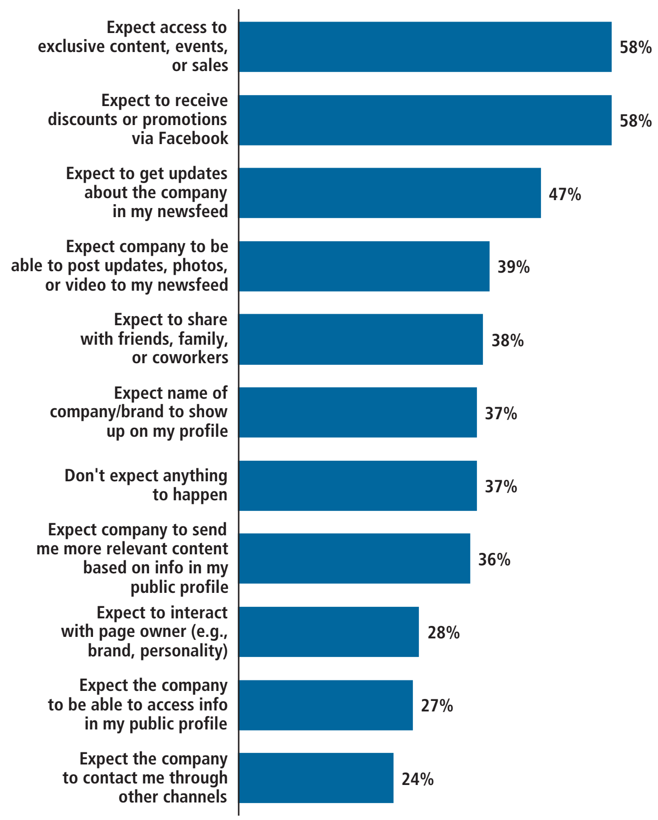
WHAT FACEBOOK USERS "LIKE" AT LEAST MONTHLY

(Among those who have ever "liked" a brand)



SOURCE: Exact Target

CONSUMERS' EXPECTATIONS AFTER "LIKING" BRAND ON FACEBOOK



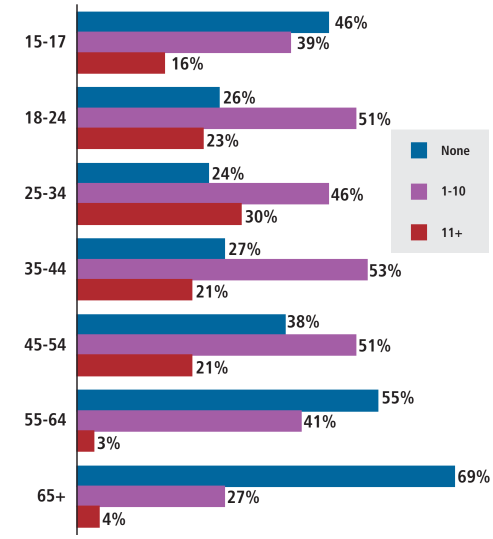
SOURCE: Exact Target

to market to them, however. Nearly four in 10 users (39%) who have "liked" a brand's Facebook page say that never means the company has permission to post marketing messages to their newsfeed or wall; 46% say it sometimes means the company has permission.

More than a third of Facebook users (35%) say they never "like" company pages on the site. Among those who do "like" some companies' pages, the top reasons for not "liking" company pages are an unwillingness to be bombarded by marketing/advertising and concerns about their privacy or that of their friends.

More than half of Facebook users (56%) feel that marketers should not access their public profile information even after they've "liked" the company. Users age 45 and older are most likely to be opposed to marketers accessing their public profile information (70% say they shouldn't, compared with 47% of those ages 25-34).

HOW MANY BRANDS FACEBOOK USERS HAVE "LIKED," BY AGE



SOURCE: Exact Target

SOURCE: "The Meaning of Like," September 2011, Mitch Frazier, Branding, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; sales@exacttarget.com; www.exacttarget.com. Price: Available online at no charge.

Beauty Fans Receptive To Promos On Facebook

Facebook users who are interested in beauty products are receptive to brands' Facebook posts about contests and promotions — more so than consumers of other products, according to L2 Think Tank. Posts providing product information also generate significant interest from beauty con-

TOP 10 BEAUTY BRANDS ON FACEBOOK, BY NUMBER OF FANS

Victoria's Secret	14,884,174
Burberry	7,518,594
Dior	4,454,632
Chanel	4,338,475
Dolce & Gabbana	3,203,572
M.A.C. Cosmetics	2,168,563
Dove	2,155,087
Sephora	1,675,656
Clinique	1,362,083
CoverGirl	1,227,911

SOURCE: L2 Think Tank

sumers. The posts most likely to be clicked on, however, are those with comments from other consumers.

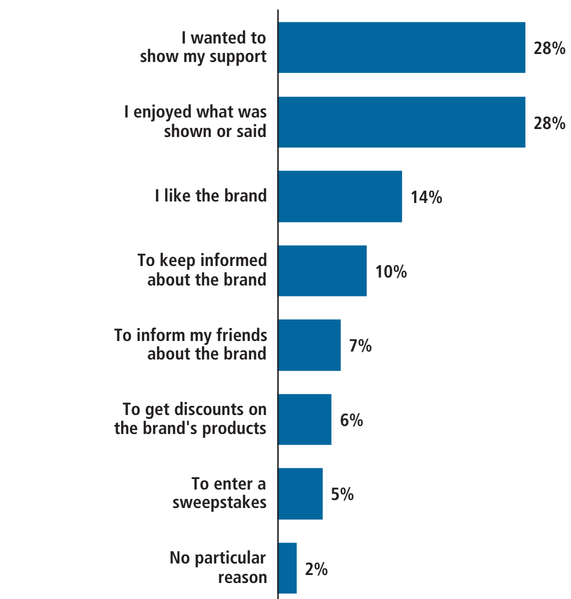
Facebook accounts for 11% of all traffic to beauty brand websites.

SOURCE: "L2 Digital IQ Index: Beauty," September 27, 2011, L2 Think Tank for Digital Innovation, Scott Galloway, Founder, 51 E. 12th St., 2nd Fl., New York, NY 10003; 212-388-1355; info@L2thinktank.com; www.L2thinktank.com.

Facebook Users Click "Like" To Show Support

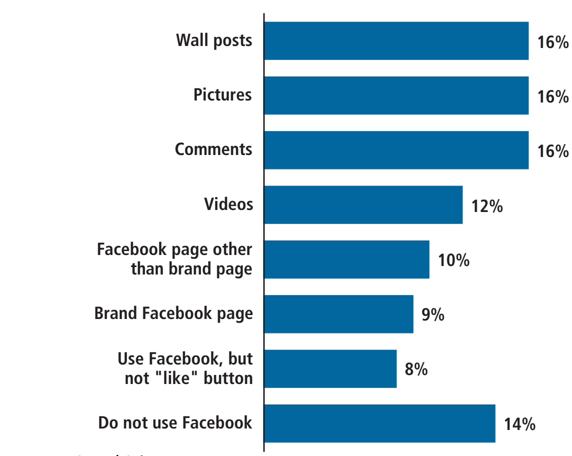
Wall posts, photos, and comments are the types of content most likely to garner "likes" on Facebook, while brand pages are least likely, finds Crowd Science. Top reasons for "liking" something on Facebook are expressing enjoyment and/or showing support.

REASONS FOR "LIKING" SOMETHING ON FACEBOOK



SOURCE: Crowd Science

ITEMS AMERICANS HAVE "LIKED" ON FACEBOOK
(% who have "liked" the type of content)



SOURCE: Crowd Science

SOURCE: "Just Ask! Facebook 'Like' Buttons," Crowd Science, November 2011, Nerissa Sardi, VP of Marketing, 1735 Technology Dr., #780, San Jose, CA 95110; 408-573-7889; info@crowdscience.com; www.crowdscience.com. Price: Contact for information.

Facebook Users Really 'Like' TV Shows

Some 275 million Facebook users have "Liked" a television show on their profiles, according to the social network. These users "Like" an average of six TV shows each.

As of mid-May, 17 of the 100 most "Liked" Facebook pages were TV shows, according to the Inside Facebook website (see table). Animated comedy *Family Guy* garners the most fans, with 31.1 million "Likes" as of May 27.

MOST 'LIKED' TV SHOWS ON FACEBOOK, MAY 2011

SHOW	NUMBER OF 'LIKES' (MILLIONS)
Family Guy	31.1
The Simpsons	27.4
SpongeBob SquarePants	22.5
House	21.9
Two And A Half Men	19.5
Glee	14.1
Grey's Anatomy	14.0
How I Met Your Mother	13.3
Futurama	13.2
The Big Bang Theory	13.0

NOTE: Data through May 27, 2011.

SOURCE: Inside Facebook

SOURCES: Facebook, Justin Osofsky, Director Media Partnerships, 471 Emerson St., Palo Alto, CA 94301; 650-543-4800; www.facebook.com.

Inside Facebook, Justin Smith, Editor, 650-468-5175; justin@insidefacebook.com; www.insidefacebook.com.

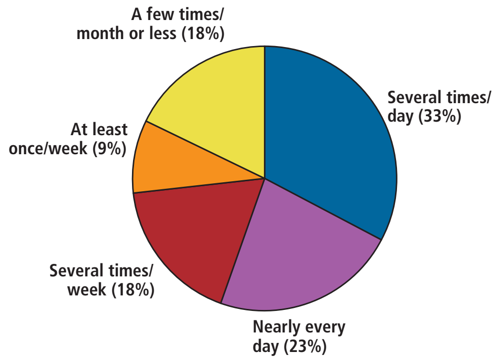
Majority Of Americans On Facebook

The number of Americans age 12 and older who visit social networking sites several times per day grew 18% between 2010 and 2011, to 46 million, according to Edison Research and Arbitron (calculations by RESEARCH ALERT). Frequent users of social networks tend to be young (68% are 12-34) and female (57%).

Facebook is the most widely used social network; 51% of Americans age 12 and older are on Facebook, while 52% have profiles on at least one social network. Although similar proportions of Americans are aware of Facebook (93%) and Twitter (92%), fewer than one in 10 (8%) use Twitter. African Americans make up a disproportionately large share of Twitter users: 22% use Twitter at least monthly, while their share of the overall population is only 12%, according to the 2010 Census.

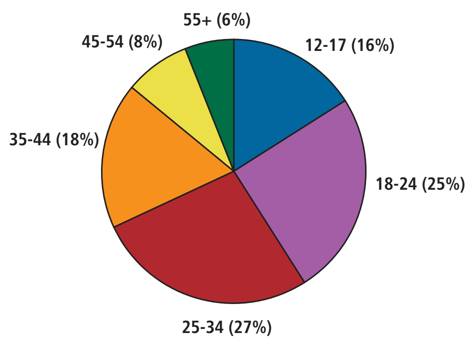
Users of other social networks are more likely than members of the overall population to use Twitter: 98% of Twitter

HOW OFTEN SOCIAL NETWORK USERS VISIT THE NETWORKS



SOURCE: Edison Research and Arbitron

FREQUENT USERS OF SOCIAL NETWORKS, BY AGE



SOURCE: Edison Research and Arbitron

users also use Facebook.

Frequent users of social networks are more likely than members of the overall population to rely solely on mobile phones. More than a third (36%) have mobiles but no landlines, compared to 24% of the overall population. Frequent users of social networks also more likely to have smartphones (56% vs. 31% of the overall population). Ownership of smartphones may encourage social networkers to check in frequently; 64% of frequent social networkers visit the sites on their mobile phones, compared to 43% of social network users overall.

A quarter of social network users (25%) follow or "friend" brands or companies on social networks, while 43% of frequent social networkers do. Among social network users who follow at least one company or brand, 80% cite Facebook as the site they use most often to connect with brands/companies. Fewer than 10% follow brands at any other social networking site.

When asked about the influence of social networks on their purchasing decisions, 24% of social network users say Facebook influences their decisions the most, but 72% say no social networks influence their decisions.

Consumers are more likely to show their support for favorite local businesses by "liking" them on Facebook (20%) than by writing online reviews (13%), according to CityGrid Media. Four in 10 adults ages 18-35 (40%) and 49% of 18-24-year-olds support businesses by "liking" them on Facebook, as do 25% of women.

More than half of adults ages 18-35 (52%) research local businesses on two or more websites before trying them. Of these, 63% look the business up on Google, 24% visit Facebook, and 21% check review sites.

Although 75% of all adults tell their friends about local businesses they like, 47% of those ages 18-35 are more strongly influenced by what the business owner has to say about his/her establishment on social networks or in reviews than by what their friends say. Fewer than one in 10 (8%) say a special deal is their top reason for trying a local business.

SOURCES: "The Social Habit II: The Edison Research/Arbitron Internet and Multimedia Study 2011," Edison Research, Tom Weber, VP Strategy, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; twebster@edisonresearch.com; www.edisonresearch.com. Price: Available online at no charge.

CityGrid Media, Kara Nortman, SVP Publishing, 8833 W. Sunset Blvd., West Hollywood, CA 90069; 800-611-4827; www.citygridmedia.com. Price: Contact for information.

Facebook And College Freshmen

Half of college freshman (52%) have at least 300 friends on Facebook, according to Mr Youth. However, this demographic draws a clear line between online and offline relationships. The majority (73%) only consider someone a "friend" if they have hung out in person.

College freshman remain engaged with social networks. Three in four (76%) spend over an hour on Facebook every day, and 40% visit the site more than 10 times per day. Two in three (67%) access Facebook from their smartphone, and 59% visit Facebook during class. Also:

- 71% have "liked" a brand on Facebook just to receive an offer.
- 43% have "liked" more than 20 brands on Facebook.
- 66% look up a store after learning their friend had checked-in via Foursquare or Facebook Places.
- 65% start researching the next model for their current product immediately after making a purchase.
- 73% earn virtual currency, with Facebook Credits (36%), Farmville Cash (25%), and Microsoft Points (17%) as the most popular.

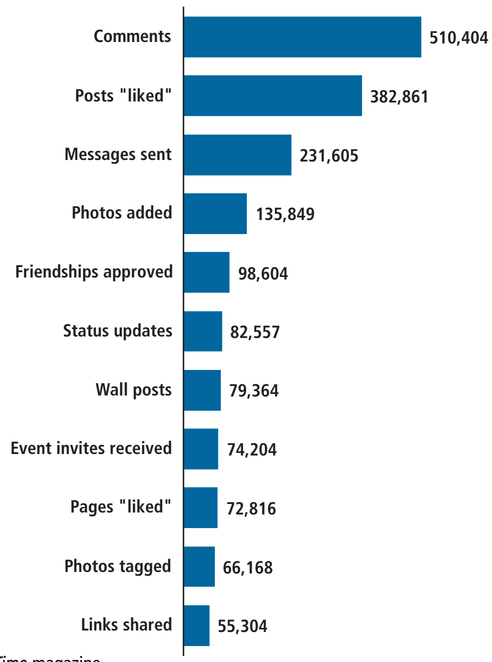
This group also is more forthcoming with some personal details than with other pieces of data. While the majority share photos of themselves (84%), discuss their relationship status (69%) or disclose their sexual orientations (69%), they are very unlikely to make their physical location, what products they purchase, or their mailing address public. However, 91% make their Facebook Places and Foursquare check-ins public.

SOURCE: Mr Youth, Matt Britton, CEO, 75 Ninth Ave., 4th Fl., New York, NY 10011; 212-779-8712; mattb@mryouth.com; www.mryouth.com.

Users Conduct One Million Facebook Activities Each Minute

There are more than one million activities performed every minute on Facebook, according to *Time* magazine. Users are most likely to make comments (510,404), claim they "like" a post (382,861), and send messages (231,605). Some 135,849 photos are added every 60 seconds, with the most photo uploads occurring last Halloween (339 million photos).

FACEBOOK ACTIVITIES THAT HAPPEN EVERY 60 SECONDS



SOURCE: *Time* magazine

SOURCE: *Time* magazine, Steve Cambron, Marketing Director, 1271 Avenue of the Americas, New York, NY 10020; 212-522-8935; steve_cambron@timeinc.com; www.time.com.

Twitter Audience: Smaller, More Active, More Impatient

As of Nov. 29, 2010, 8.25 million U.S. adults had made at least one visit to Twitter.com during the previous 30 days, down 13.5% from the 9.54 million adults who had visited the site in the 30 days prior to Nov. 30, 2009, according to Experian Simmons DataStream.

Twitter visitors check out the microblogging site 10 times per month, on average — a 37% increase from last year. However, the duration of the average Twitter.com session has declined 13%, according to Experian Hitwise: from 15 minutes, 12 seconds on Nov. 27, 2009 to 13 minutes, 12 seconds on Nov. 28, 2010.

SOURCE: Experian Simmons, John Fetto, Senior Marketing Manager, 600 Third Ave., New York, NY 10016; 212-749-3162; john.fetto@experian.com; www.experian.com.

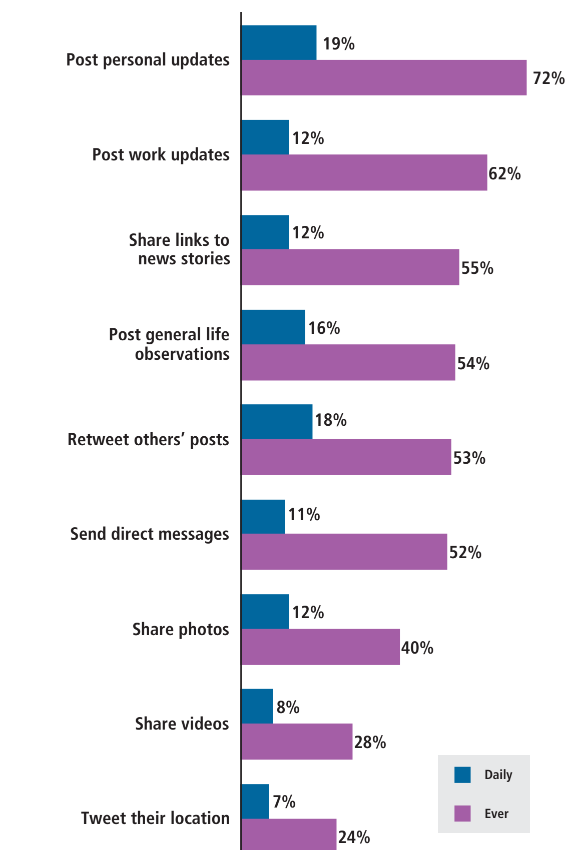
Twitter Users: Who Uses The Status Update Site And How

Fewer than one in 10 Americans (8%) use Twitter. Women (10%) are more likely than men (7%) to do so. Those aged 18-29 (14%) are at least twice as likely as their older counterparts — 7% of 30-49 year olds, 6% of 50-64 year olds, and 4% of those aged 65 and older — to use the service.

Hispanics (18%) and Blacks (13%) are significantly more likely than Whites (5%) to use Twitter. In addition, Urban residents (11%) are more likely than those living in suburban (8%) and rural areas (5%) to use Twitter.

More than a third of Twitter users (36%) check the site at least once a day, including 24% who visit the site several times a day.

TWITTER USERS' ACTIVITIES ON THE SOCIAL NETWORK, DAILY VS. EVER, 2010



SOURCE: Pew Internet & American Life Study

SOURCE: "8% Of Online Americans Use Twitter," 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.

Consumers Resist Registering At Websites

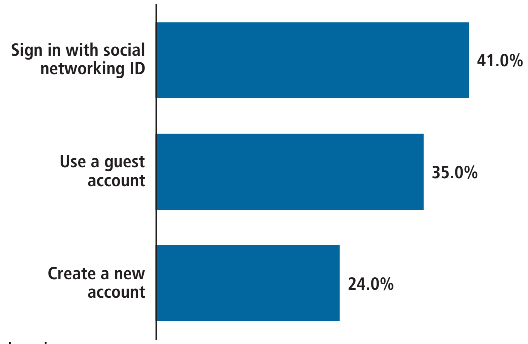
Only one in four consumers who use social neworking are willing to register at websites, finds Janrain. Three quarters (76%) say they've given incomplete or incorrect information when creating new accounts on company websites, while 24% are always truthful when registering.

If they forget a username or password on a site they've already registered for, 45% will abandon the page rather than answer security questions or reset their passwords.

Two thirds (66%) of social network users say they'd like to have the option of signing in to other websites using their existing social networking accounts.

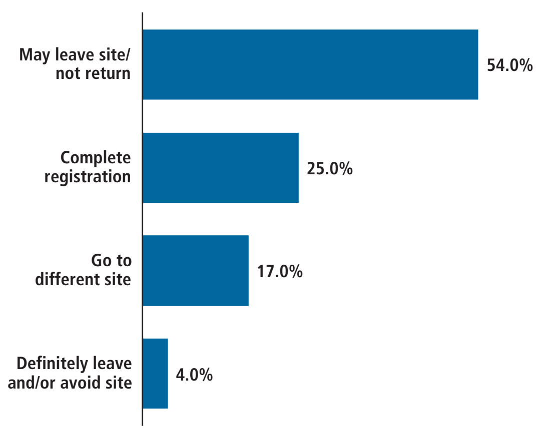
More than half (55%) of social network users say they're more likely to return to websites that automatically recognize them by their social network identities. Just under half (48%) say they're more likely to buy products from sites that recognize them by their social networking identities.

SOCIAL NETWORK USERS' PREFERRED MEANS OF SIGNING INTO WEBSITES



SOURCE: Janrain

SOCIAL NETWORK USERS' REACTIONS TO BEING ASKED TO REGISTER AT WEBSITES



SOURCE: Janrain

SOURCE: "Consumer Perceptions of Online Registration and Social Sign-In," Janrain, Larry Drebes, CEO & CTO, 519 SW 3rd Ave., #600, Portland, OR 97204; 503-243-1176; info@janrain.com; www.janrain.com. Free download with registration: http://www.janrain.com/consumer-research-social-signin

Motivating And Capitalizing On "Likes;" Facebook Fan Research Suggests Most Effective Engagement Strategies

Facebook has become a critical channel for companies to connect with today's youth. With 500 million members and counting, there are relatively few 15-year-olds that don't have Facebook accounts. What follows is an overview of research from ExactTarget, Vitrue, and Beyond that will help marketers tailor Facebook (and other social media) campaigns for maximum impact.

Brands Should Post Messages Before Noon

Fans primarily "like" a brand on Facebook in order to receive discounts or promotions, according to social media management company Vitrue. Users also become fans to publicly show support for a company, as a way of self-branding, and to receive free products.

Friday posts from brands generate the most user engagement, which mean users will post comments and "share" a link; brand postings on Saturday and Sunday receive the least amount of attention from users.

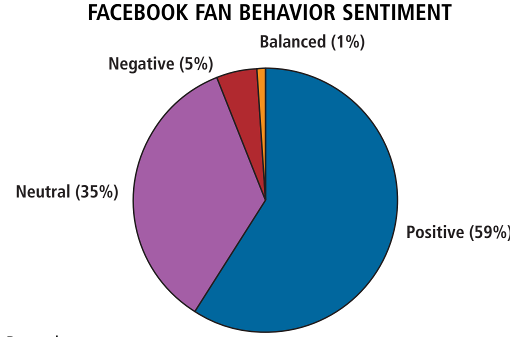
There are some notable differences for two youth-favored categories. Messages by consumer packaged goods brands posted on Thursday are 136% more effective in getting user response and engagement than if the same message is posted on a Wednesday and it's 51% more effective than if the same message is posted on Sunday, finds Vitrue.

Similarly, a fast food chain message posted on Facebook on a Wednesday is 34% more effective than the same message posted on a Sunday, 156% more effective than the message posted on a Saturday, and 147% more effective than the message posted on a Tuesday.

In general, messages posted before noon receive 65% more interaction from fans, with fast food chains as a notable exception. These companies receive a better response rate when they post messages after noon, which Vitrue attributes to the fact that users are most likely to be hungry and thinking about meals during the afternoon.

Brands also get better response rates to messages posted at the top of the hour (:0 to :15 minutes).

FACEBOOK FAN BEHAVIOR SENTIMENT



SOURCE: Beyond

Facebook Users Like Pretty Pictures

Image and video posts are more effective than text-only posts in getting fans to interact with a brand. Users prefer images to video. Vitrue reports images or pictures receive 22% more engagement from users than video posts. This is likely due to the difficulty in creating good video content, as well as the fact that users typically must spend a few minutes watching a video (compared to spending just seconds to view an image) and that a video has to be extremely memorable for users to watch and then share it.

REASONS USERS "LIKE" BRANDS ON FACEBOOK

Receive discounts and promotions	40%
Publicly show support for a company	39%
Receive free products	36%
Stay informed of company activities	34%
Receive information on future products	33%
Learn of upcoming sales	30%
Fun or entertainment	29%
Obtain access to exclusive content	25%
Someone recommended it	22%
Learn more about a company	21%
For education about company topics	13%
To interact	13%

SOURCE: ExactTarget

Fans Speak Out

Young fans are pretty enthusiastic about the brands they endorse on Facebook. The majority of posts (59%) praise brands and only 5% of posts are negative. Most Facebook fans prefer to air their grievances in private, says Beyond. When users complain about brands, 80% do so via email, 54% by phone, 28% write a letter, and 20% submit a website form.

It's probably a good thing fans prefer to bypass Facebook to vent their concerns. Only 0.3% of requests for help from a company representative receive a response and 2.2% of requests for help from other fans receive feedback. To be fair, it's difficult for brands to separate the important messages from the nonsensical. Some 15% of fan posts are self-promotional spam and 6% are irrelevant messages (e.g. my cat is like me), reports Beyond.

Maximizing Fan Engagement

The agency Beyond outlines a few key strategies shared among sites with relatively high fan bases. They include:

Don't Try Too Hard. Companies that post frequently on their own page tend to have fewer fans partly because fans tend to feel uncomfortable when brands appear to be too closely monitoring the interaction. That said, there's a fine line between too much and too little. Infrequent postings often result in "out of sight, out of mind."

Accept The Good And Bad. The overall tone towards the company (e.g. haters) does not impact the number of fans on the page, nor does the proportion of positive to negative posts. Having said that, brands should not ignore negative comments. Since users prefer using other channels to vent their frustrations, Beyond recommends funneling these detractors to appropriate channels and addressing them accordingly.

Utilize All Media. The number of images posted on the page — both by the brand and fan — correlates with a higher fan count. However, images and videos are great to lure fans to the site, but direct questions are most effective in getting fans to make comments and encourage interaction. Beyond recommends aiming for a ratio of brand comments to fan comments of 1:10. There's also a high correlation between the number of fans and pages that feature numerous applications, such as games.

SOURCES: Beyond, David Hargreaves, CEO, 77 Maiden Ln., 3rd Fl., San Francisco, CA 94108; 415-260-7814; david@bynd.com; www.bynd.com.

ExactTarget, Morgan Stewart, Director Research Strategy, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; mstewart@exacttarget.com; www.exacttarget.com.

Vitrue, Erika Brookes, VP Marketing, 101 Marietta St., #1700, Atlanta, GA 30303; 404-478-8320; erika@vitrue.com; www.vitrue.com.

Auto And Fashion Brands Have Most "Likes"

Fashion and cosmetics brands are the most active on Facebook, according to a study of upscale brands by L2 Think Tank. Brands that post most frequently or interact with fans aren't necessarily most popular.

PRESTIGE BRANDS WITH THE LARGEST FACEBOOK FANBASES, MAY 2011

BRAND	NUMBER OF "LIKES"
Burberry	6,106,161
BMW	5,466,041
Gucci	4,380,365
Ferrari	4,246,766
Chanel	3,659,547

PRESTIGE BRANDS THAT POST MOST FREQUENTLY ON FACEBOOK

BRAND	POSTS PER WEEK
Oscar de la Renta	43
Dolce & Gabbana	35
Diane von Furstenberg	30
Bobbi Brown	25
Benefit	24

PRESTIGE BRANDS THAT RESPOND MOST OFTEN TO FAN POSTS

BRAND	% OF WEEKLY FAN POSTS TO WHICH BRAND RESPONDS
L'Occitane	66%
Kiehl's	52%
Korbel	50%
Vacheron Constantin	50%
Aveda	45%

SOURCE: L2 Think Tank

SOURCE: "Facebook IQ, June 2011" L2 Think Tank, Scott Galloway, Founder, 821 Broadway, 2nd Fl., New York, NY 10003; 212-388-1355; info@L2thinktank.com; www.L2thinktank.com.

Social Media Moms Seek Online Recommendations For Purchases

Nearly eight in 10 moms with children under 18 are active in social media, including having Facebook or Twitter accounts and blogging, according to NPD Group and Child's Play Communications. Of these social media moms, 23% have purchased a children's product as a result of a recommendation from a social network or blog.

Active social media moms who purchase a children's product based on a social media recommendation did so an average five times in the past year; 55% made the purchase through a recommendation from a personal review blog and 40% from a Facebook recommendation.

SOURCES: Child's Play Communications, Sarah Fraser, 135 W. 29th St., #701, New York, NY 10001; 212-488-2060 x 14; sf@childsplaypr.com; www.childsplaypr.com.

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.

The Evolution of Social Media: A Look At Young Users

Girls aged 6-17 are spending less time on Facebook and MySpace, but using niche sites, such as Poptropica, Stardoll, and Club Penguin, more. These niche sites allow for greater anonymity and fit their unique interests, according to Bridge Ratings. The girls' primary uses of social media include:

- Social networking to make friends and for companionship;
- Twitter to stay in touch and see what others are talking about; and
- Niche networks to fuel their hobbies and other interests.

SOURCE: 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.

Nearly All Kids Have Online Footprint By Two

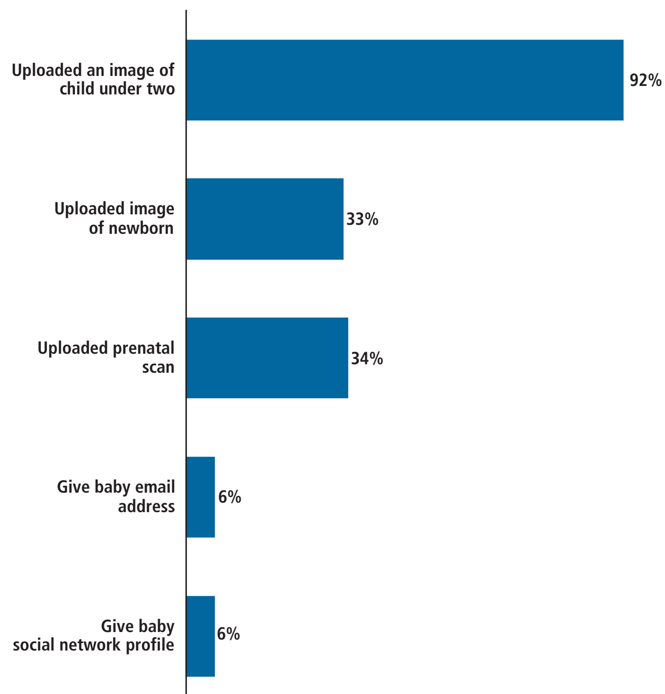
Some 92% of U.S. children have an online presence by their second birthday, according to Internet security firm AVG Technologies. One in four U.S. parents have uploaded an image of a sonogram.

Parents are primarily motivated to post these pictures and content in order to share them with friends and family. Two in 10 U.S. moms (22%) post baby pictures to increase their own social network profiles and 18% say they are simply following their peers.

Overall, moms are only moderately concerned (3.5 on a scale of one to five, with five being very concerned) about the amount of online information they have posted about their children.

SOURCE: AVG Technologies, Siobhan MacDermott, 1 Executive Dr., 3rd Fl., Chelmsford, MA 01824; 415-299-2945; siobhan.macdermott@avg.com; www.avg.com.

DIGITAL REPRESENTATION OF U.S. CHILDREN UNDER AGE TWO

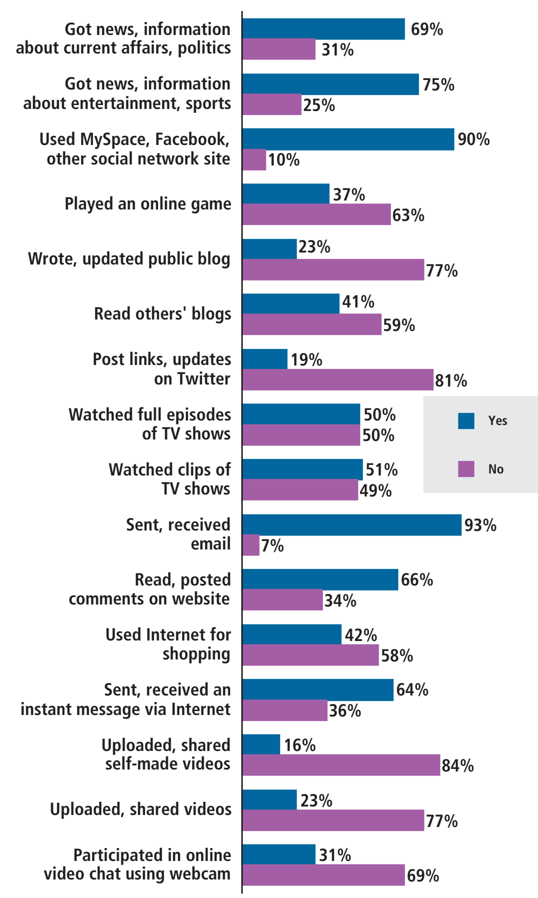


SOURCE: AVG

Half Of Teens, Young Adults Spend Hours on Internet Daily

Half of 18-24-year-olds (52%) spend 2-6 hours a day using the Internet, according to an AP-MTV poll conducted by Edison Media. Only 15% go online less than two hours a day, while 33% use the Internet for more than six hours each day. These teens and young adults, unsurprisingly, spend most of their Internet time visiting social networking sites, getting news, and sending email.

INTERNET ACTIVITIES PERFORMED BY 18-24-YEAR-OLDS WITHIN PAST WEEK



SOURCES: AP, MTV

This group also spends a lot of time on mobile phones: 39% send 31-100 text messages each day. Some 10% send more than 201 text messages daily.

SOURCES: Associated Press, Jack Stokes, 450 W. 33rd St., New York, NY 10001; 212-621-1739; jstokes@ap.org; www.ap.org.

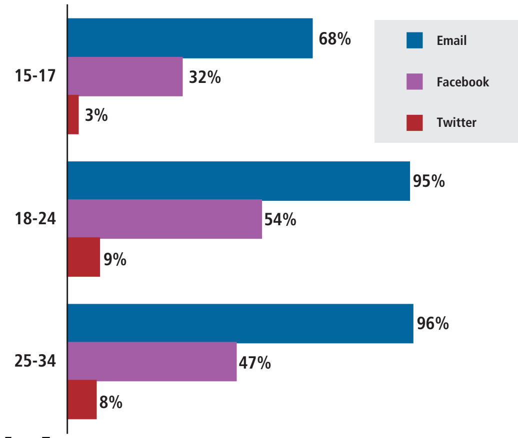
MTV Networks, Colleen Fahey Rush, EVP Research, 1515 Broadway, New York, NY 10036; 212-258-8000; www.mtv.com.

Teens Most Likely To Engage Brands Via Email

Two in three 15-17-year-olds (68%) receive at least one permission-based email a day, according to ExactTarget. By comparison, 95% of those age 18-24 receive at least one such email daily.

One in three teens (32%) are fans of at least one company on Facebook, but only 3% of teens with a Twitter account follow at least one brand via that service.

ONLINE USER ENGAGEMENT WITH BRANDS VIA EMAIL, FACEBOOK, AND TWITTER, BY AGE



SOURCE: ExactTarget

SOURCE: ExactTarget, Morgan Stewart, Director Research Strategy, 20 N. Meridian St., Indianapolis, IN 46204; 317-423-3928; mstewart@exacttarget.com; www.exacttarget.com

Teens' Online Privacy And Their Parents' Monitoring Behaviors

Eight in 10 teens (80%) use privacy settings to hide content from friends or parents and 18% have been embarrassed or disciplined as a result of an online posting, according to online privacy agency Truste and Lightspeed Research. Teens are increasingly aware of potential privacy issues and parents are definitely more active in monitoring their teens' online behavior.

Three in four parents (74%) monitor their teens' accounts, with 50% doing so weekly, 35% daily, and 10% monthly. More than eight in 10 parents (84%) feel they have a solid understanding of their teens' online activities and a similar percentage (84%) are confident their teen is responsible in posting personal information on social networks.

Even though parents may feel their teen is responsible, 82% would like to delete information from their child's account or at least exert more control. Nearly nine in 10 (89%) want default privacy settings on all teen accounts.

TEENS' WILLINGNESS TO ACCEPT ONLINE FRIENDS THEY DON'T KNOW

Always accept	8%
Accept some	34%
Never accept	26%

SOURCES: Truste, Lightspeed Research

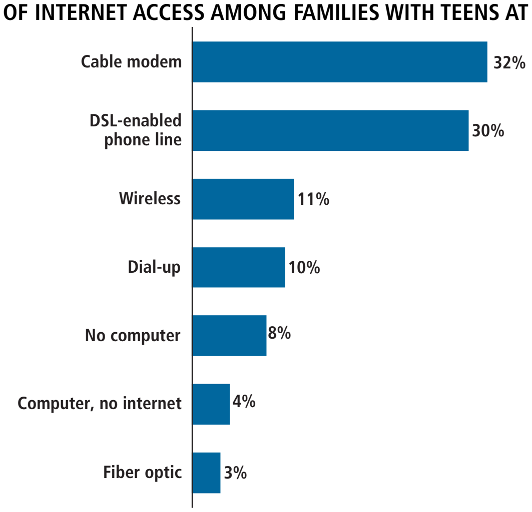
SOURCES: Lightspeed Research, 180 Mount Airy Rd., #100, Basking Ridge, NJ 07920; 908-630-0542; info@lightspeedresearch.com; www.lightspeedresearch.com.

Truste, Fran Maier, Executive Director/President, 685 Market St., #270, San Francisco, CA 94105; 415-520-3400; fmaier@truste.org; www.truste.org.

Not All Teens Have Internet Access

It's true that most teens are tech-savvy online mavens, yet it also must be pointed out that not all teens are this way. Two in 10 teens (20%) live in homes that either have no Internet access or have only dial-up connections, according to the Pew Research Center. Furthermore, 79% of teens who do not go online with a computer at home also do not access the Internet with their cell phones.

TYPE OF INTERNET ACCESS AMONG FAMILIES WITH TEENS AT HOME



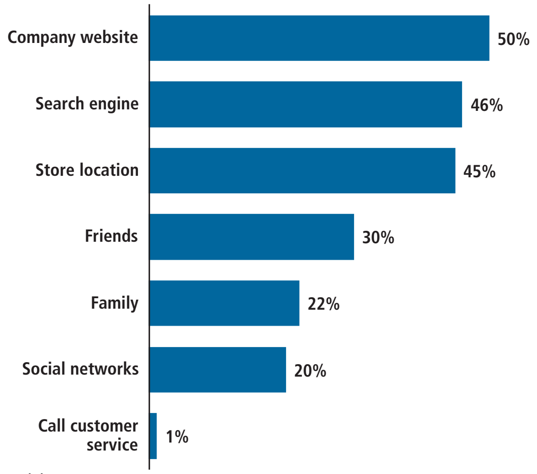
SOURCE: Pew Internet & American Life Project

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.

Millennials Turn To The Internet For Customer Service Information

Seven in 10 Millennials say they would express their negative feelings about a brand, ranging from discouraging a friend from purchasing a product to posting an online video, according to Edelman. The global report of those living in the U.S., Brazil, Canada, China, Germany, India, Italy, and the UK also finds millennials, unsurprisingly, turn to the Internet for help in dealing with companies. The largest number would seek information about customer service via the company's website (50%) or an online search engine (46%). Less than 1% would call customer service.

FIRST PLACE MILLENNIALS TURN TO FOR INFORMATION ON CUSTOMER SERVICE



SOURCES: Edelman, StrategyOne

SOURCES: Edelman, Alex Abraham, Consumer Marketing 200 E. Randolph St., 63rd Fl., Chicago, IL 60601; 312-240-3000; alex.abraham@edelman.com; www.edelman.com.

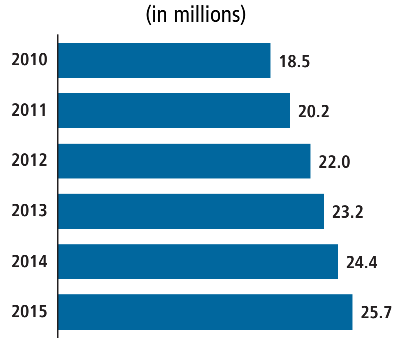
StrategyOne, Chuck Brinker, Primary Market Research, 200 E. Randolph St., 62nd Fl., Chicago, IL 60601; 312-240-2794; chuck.brinker@strategyone.com; www.strategyone.com.

26 Million Children Will Be Online By 2015

The number of Internet users under age 12 is projected to increase from 20.2 million in 2011 to nearly 26 million in 2015, according to eMarketer.

U.S. INTERNET USERS UNDER AGE 12, 2010-2015

(in millions)



NOTE: Those under age 12 who use the Internet from any location via any device at least once a month.

SOURCE: eMarketer

SOURCE: eMarketer, Debra Aho Williamson, Senior Analyst, 75 Broad St., New York, NY 10004; 206-275-1568; dwilliamson@emarketer.com; www.emarketer.com.

COMPANIES THAT ARE DOING A GREAT JOB MARKETING TO TEENS VIA FACEBOOK AND WHY

Users prefer companies that provide deals and discounts, and that avoid jargon or boring ad-speak, according to an ExactTarget survey of Facebook users. (It's important to note the total number of fans a brand accumulates is not an effective way to measure the success of a Facebook marketing campaign.) These five companies are cited by survey participants as effectively reaching them as "fans:"

Oreo: Continuous coupons and freebies keep the brand's eight million-strong fanbase growing.

Victoria's Secret: The six million fans, primarily women, enjoy publicly showing their support of the brand and learning of new product offerings.

iTunes: The seamless integration between the iTunes music service and Facebook easily allows users to flip between the two sites. It's important to integrate the Facebook presence with other social and web-based media.

Dove: Though the company has fewer than 200,000 fans, it responds quickly to posts and has created a tight community of like-minded brand ambassadors.

SOURCE: ExactTarget

factoids

- Americans' use of **social networking** sites has grown 93% since 2006. *(Netpop Research; phone: 415-647-1007)*
- More than eight in 10 U.S. Internet users (86%) watched **online video** in July 2011. *(comScore; phone: 312-777-8801)*
- Eight in 10 unmarried, childless Americans ages 18-34 (81%) have visited **Facebook, Twitter, or MySpace** in the past month. *(The Media Audit; phone: 713-626-0333)*
- More than six in 10 parents (62%) occasionally **monitor their children** while they're on social networks. *(SocialShield; phone: 800-239-0120)*
- Facebook is the most widely visited **website** among online Americans, accounting for 11% of all visits. *(Hitwise; phone: 212-380-2900)*
- Women age 50 and older are 31% more likely than those younger than 50 to **click on ads** on Facebook. *(Social Code; phone: 202-261-2847)*
- More than half of online men (53%) and 34% of online women have watched **online videos** while at work. *(Qumu; phone: 650-396-8530)*
- Almost nine in 10 (87%) of *Billboard*'s Top 100 Musicians of 2010 have **Twitter** accounts. *(Twitter; phone: 415-896-2008)*
- Consumers tweet about **websites** that include a "tweet" button seven times more frequently than they do about those with no button. *(Bright Edge; phone: 650-627-3513)*
- Almost half of 18-34-year-olds (48%) log onto **social networks** just before going to bed. *(Lightspeed Research; phone: 908-605-4480)*
- A quarter of shoppers who use social networks (25%) check the pages of their **favorite brands** at least once a month. *(Compete; phone: 617-933-5600)*
- Women who work in the ranching industry are better at **networking** than men in that industry; men who work in the cosmetics industry are better at networking than women in that industry. *(LinkedIn; phone: 650-687-3600)*
- More than a quarter of U.S. Internet users ages 18 and older (28%) watched online videos on a **video-sharing** site (such as YouTube) "yesterday." *(Pew Internet and American Life Project; phone: 202-419-4500)*
- U.S. online **retail spending** (excluding corporate and automotive purchases) was $37.5 billion in 2nd quarter 2011. *(comScore; phone: 866-276-6972)*
- Four in 10 Internet users (39%) who create **social sign-ins** (profiles to be used when logging into websites) use their Facebook identities to do so. *(Janrain; phone: 503-243-1176)*
- Seven in 10 consumers (73%) who prefer to do their **shopping online** cite saving time as the primary reason. (*Invesp; phone: 800-421-7393)*
- More than one in 10 searches (13%) on the Dogpile search engine are for **erotic content**. *(*A Billion Wicked Thoughts, *by Ogi Ogas Ph.D. et al; authors@billionwickedthoughts.com. Penguin Books, Amanda Walker; phone: 212-366-2212)*
- A quarter of consumers (25%) who post complaints about brands on **Facebook or Twitter** expect to receive a response within one hour; 6% expect a response within 10 minutes. *(Lightspeed Research; phone: 908-605-4480)*
- Millenials are 29% more likely than the average adult to feel that their interactions on **social networking sites** are just as meaningful as in-person interactions. *(GfK MRI; phone: 212-884-9200)*
- Nearly three quarters of **small businesses** (73%) use social media for marketing. *(Constant Contact; phone: 781-482-7039)*
- Moms are almost twice as likely to become fans of brands or products as they are to become fans of or "like" celebrities on **social networks** (58% vs. 27%). *(Parenting Group; phone: 212-779-5264)*
- Internet users look to **blogs** for reviews and recommendations for consumer electronics (35%), computer hardware/software (33%), and movies (33%). *(BlogHer; 650-551-1364)*
- Almost half of U.S. adults (105.8 million people) have visited a **social media** website within the past month. [*(GfK MRI; phone: 212-884-9200)*
- More than nine in 10 U.S. companies (94%) do not use any social media to gather **customer feedback**. *(MarketTools; phone: 415-957-2200)*
- Users of **broadband Internet** spend 48% of their spare time online on a typical weekday. *(NetPop Research; phone: 415-647-1007)*
- Five of the 10 most widely followed **Twitter** users are musical performers. *(Twitalyzer; phone: 503-282-2601)*
- Four in 10 women (41%) find it annoying when their friends brag about their achievements on **Facebook**. *(*Women's Health *magazine; phone: 212-697-2040)*
- 71% of consumers know that their **online behavior** may be tracked, but only 40% realize that this tracking is anonymous. *(Knowledge Networks; 650-289-2000)*
- Half (50%) of **Twitter users** view tweets on their mobile devices, and 40% post via mobile. *(Kleiner Perkins; phone: 650-233-2750)*
- 200 million people play games on **Facebook** each month. *(Parks Associates; phone: 972-490-1113)*
- Customer satisfaction with **e-commerce websites** dropped 2.6% between 2010 and 2011, to its lowest level since 2004. *(American Customer Satisfaction Index; phone: 734-913-0788)*
- More than half (58%) of moms who use **social media** have "liked" a brand on Facebook. *(The Parenting Group; phone: 407-628-4802)*

➤ Adults aged 18-34 (42%) **follow brands** on social networks, compared to 32% of 35-54 year olds and 16% of those aged 55 and older. *(Burst Media; phone: 781-852-5291)*

➤ One in six teens (16%) who are friends with their parents on a **social network** say it was a condition of their being allowed to create their own profile. *(Kaplan; phone: 212-453-7538)*

➤ More than six in 10 online Americans (61%) believe that websites know **non-personal information** about them, and 55% believe sites know personal information about them. *(Burst Media; phone: 781-272-5544)*

➤ **Social media** users click on links an average of two minutes after they've been posted or otherwise shared. *(Unruly Media; phone: 212-586-7859)*

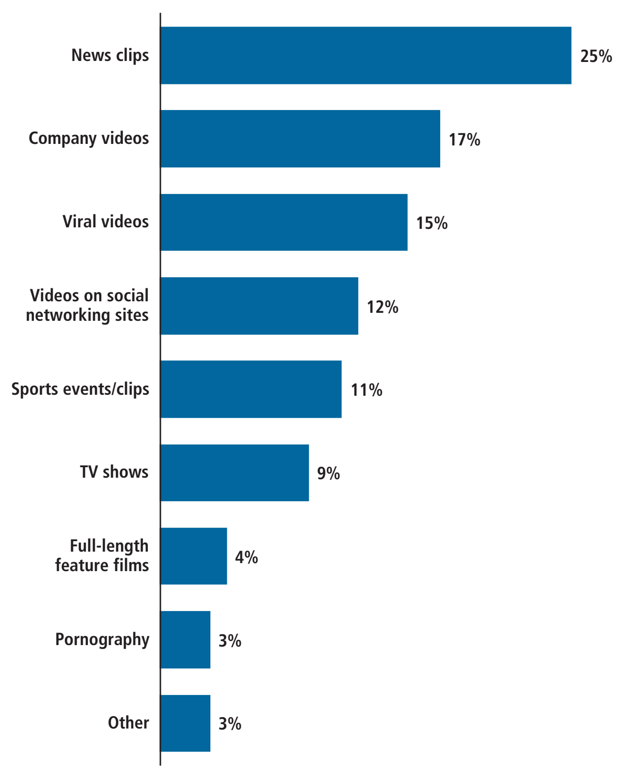
➤ Global sales of **virtual products** used in mobile social media are expected to reach $4.7 billion by 2016. *(Juniper Research; phone: 011-44-1256-830-001)*

➤ More than 72 million Americans accessed **social networks** or blogs via their mobile phones in August 2011. *(comScore Media Metrix; phone: 703-438-2000)*

➤ Some 13% of visitors to a media website watch **pre-roll ads.** *(TubeMogul; phone: 510-653-0501)*

➤

TYPES OF ONLINE VIDEOS AMERICANS WATCH WHILE AT WORK



SOURCE: Harris Interactive, 161 Sixth Ave., New York, NY 10013; 585-272-8400; info@harrisinteractive.com; www.harrisinteractive.com.

➤ Global men are more likely than women to visit a company's website because of a piece of **direct mail** they received (49% vs. 44%). *(GI Insight; phone: 011-44-116-225-2089; marketing@gi-solutionsgroup.com)*

➤ Consumers are most likely to open **direct marketing emails** from travel companies (18%) and least likely to open ones from medical organizations (7%). *(MailerMailer; phone: 301-825-5658)*

➤ Online Americans interact with an average of 11.8 brands via **marketing emails**. *(MailerMailer; phone: 301-825-5658)*

➤ Women age 50 and older are 31% more likely than those younger than 50 to **click on ads** on Facebook. *(Social Code; phone: 202-261-2847)*

pets

The majority of U.S. households have pets, and nearly all pet owners think of their animals as part of the family. Women are more likely than men to live with pets, and Gen Xers are more likely than members of other generations. Cats and dogs are most popular; more people have dogs than cats, but cat owners are more likely to have multiple cats than dog owners are to have multiple dogs.

Americans spent an estimated $50 billion on their pets in 2011, the majority of it on food and veterinary care. They're not just buying basics, however; the majority buy holiday gifts for their pets. Most cats and dogs get to sleep in their owners' beds, and one in 10 follow them to work.

When asked what's most important in keeping pets healthy and happy, more pet owners cite love and attention than nutrition or exercise, which may account for the high proportion of pets that are overweight or obese.

Americans Consider Pets Family

Six in 10 U.S. adults (62%) currently have pets at home, according to Harris Interactive. Women (69%) are more likely than men (55%) to have pets, and Gen Xers are more likely than older or younger adults to have them. Whites (66%) and Hispanics (65%) are almost twice as likely as African Americans (32%) to have pets. Pet ownership increases with income level but decreases with education.

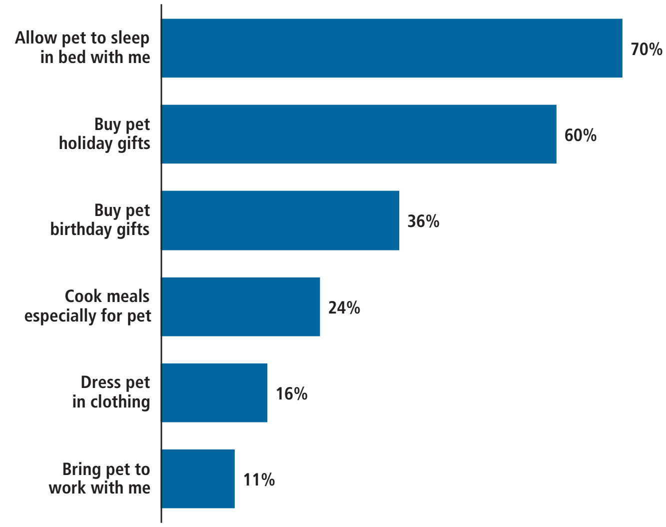
Dogs and cats are the most popular pets — 69% of pet owners have dogs, and 51% have cats. Echo Boomers (ages 18-34) are more likely than members of other generations to have dogs, while Gen Xers (ages 35-46) are more likely than those in other generations to have cats. Cat owners are more likely to have multiple cats than dog owners are to have multiple dogs — 54% of those who own cats have two or more, compared to 37% of dog owners with two or more dogs.

Nine in 10 pet owners (91%) consider their pets to be part of their families, and six in 10 (60%) buy gifts for their pets. Women (95%) are more likely than men (85%) to think of their pets as family. Echo Boomers are more likely than members of older generations to allow their pets to sleep with them (76% do so frequently or occasionally), buy their pets holiday (66%) or birthday presents (50%), dress them in clothing (28%), or bring them to work (21%).

Cats are more likely than dogs to be allowed to sleep with their owners (82% of cats vs. 70% of dogs), but dogs receive more gifts and are more likely to have special meals cooked for them.

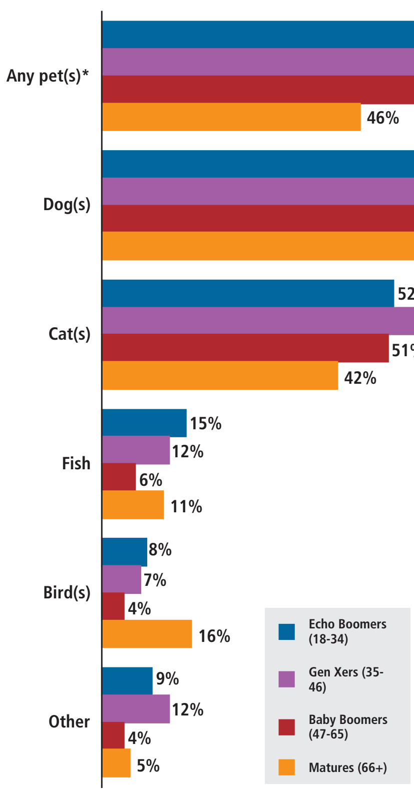
SOURCE: Harris Poll #70, June 2011, Regina Corso, SVP Public Relations and Youth Research, Harris Interactive, 161 Sixth Ave., New York, NY 10013; 585-272-8400; info@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

PET OWNERS' BEHAVIOR TOWARD THEIR PETS



SOURCE: Harris Interactive

AMERICANS WHO OWN PETS, BY GENERATION



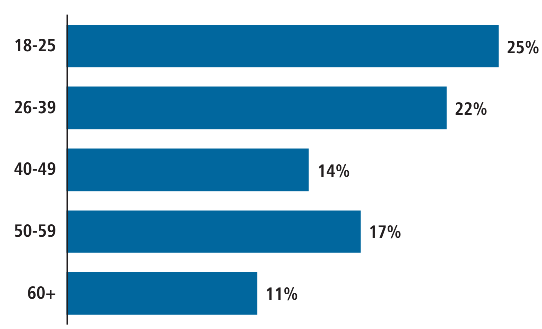
*NOTE: Base for own any pet is all U.S. adults; base for others is pet owners.

SOURCE: Harris Interactive

The Majority Of U.S. Homes Include Pets

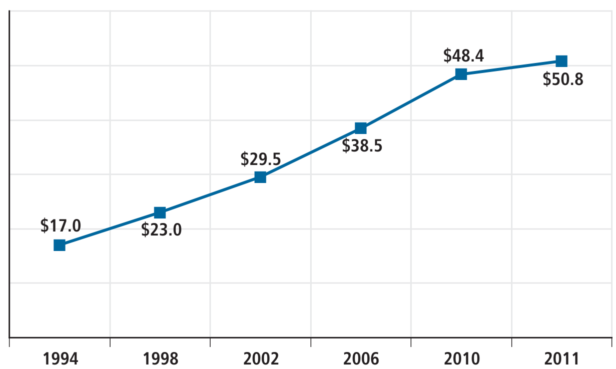
More than six in 10 U.S. households (62%) — a total of 72.9 million homes — include at least one pet, according to the American Pet Products Association. Pet ownership has increased 11% since the APPA began conducting the survey in 1988 (calculations by Research Alert). Dogs have the

AMERICANS WHO SPEND MORE THAN $100 PER MONTH ON THEIR PETS, BY AGE OF OWNER



SOURCE: AdGenesis

U.S. HOUSEHOLDS' SPENDING ON PETS, 1994-2011
(in $billions)



NOTE: Spending for 2011 is projected.

SOURCE: American Pet Products Association

largest presence in terms of numbers of households, but cats are more numerous.

Americans spent more than $48 billion on their pets in 2010, and are expected to top the $50 billion mark in 2011. The largest percentage of that will be spent on food ($19.5 billion), followed by veterinary care ($14.1 billion).

Dog owners spend more than cat owners do on kennels and other travel-related expenses, vitamins, grooming, and treats. Expenditures on food and vet care are fairly similar.

Spending on pets tends to decrease with age (of the humans), according to AdGenesis. The majority of households (57%) spend less than $50 per month.

PET OWNERSHIP AMONG U.S. HOUSEHOLDS
(households in millions)

Dogs	46.3
Cats	38.9
Freshwater fish	11.9
Birds	5.7
Small animals	5.0
Reptiles	4.6
Horses	2.4
Saltwater fish	0.7

SOURCE: American Pet Products Association

U.S. PET POPULATIONS, BY SPECIES
(in millions)

Freshwater fish	151.1
Cats	86.4
Dogs	78.2
Birds	16.2
Small animals	16.0
Reptiles	13.0
Saltwater fish	8.6
Horses	7.9

SOURCE: American Pet Products Association

SOURCES: "2011-2012 National Pet Owners Survey" and spending statistics compiled from separate market research, American Pet Products Association, Marian Thielsen, Director of Marketing, 255 Glenville Rd., Greenwich, CT 06831; 203-532-0000; mthielsen@americanpetproducts.org; www.americanpetproducts.org. Price: Selected data are available online.

"Market Insights Report: Pets We Have," AdGenesis, Michael Kelley, CMO, 242 W. 30th St., 8th Fl., New York, NY 10001; 646-350-4418; insights@adgenesis.com. Price: Available online at no charge.

Majority Of U.S. Pets Are Overweight

More than half of pet dogs (56%) and cats (54%) in the U.S. are overweight, according to the Association for Pet Obesity Prevention. About a third of cats (32%) and 35% of dogs in the study are overweight; 22% of cats and 21% of dogs are obese.

Obesity rates among pets have increased every year since the group began measuring in 2007. Between 2007 and 2010, obesity among cats climbed 16% and that among dogs doubled (calculations by Research Alert). The authors note that improved measurement standards for obesity among dogs may be partly responsible for the large increase.

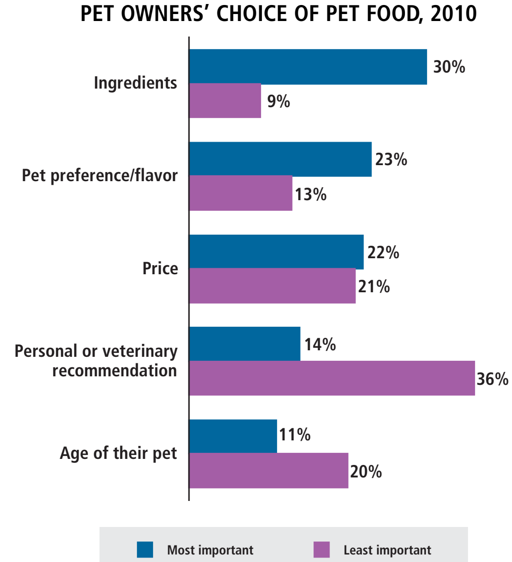
Fewer than one in 10 cats (7%) or dogs (5%) are considered "thin." Fewer than 1% of either species are underweight.

SOURCE: "2010 Pet Obesity Survey," Association for Pet Obesity Prevention, Dr. Ernie Ward, President, 9256 Beach Dr., Calabash, NC 28467; 910-579-5550; drward@seasidevet.com; www.petobesityprevention.com

Pet Owners Place Importance On Showing Affection For Their Pets

Nearly half of Americans who have a cat or dog (45%) say that giving their pets lots of love and attention is the most

MOST IMPORTANT AND LEAST IMPORTANT FACTORS INFLUENCING PET OWNERS' CHOICE OF PET FOOD, 2010



SOURCE: Ipsos

important factor in giving them a happy healthy life, according to Ipsos. By comparison, only 19% say routine vet care is the most important factor, followed by 17% who cite regular exercise, and 15% who cite age appropriate diet and nutrition. The vast majority (71%) says showering their pet with toys and treats is least important to giving them a happy life.

When choosing a food brand for their pet, ingredients are the most important factor. Pet owners are least likely to place importance on the recommendations of their vet or friends and family.

Pet owners are divided on the importance of price of pet food. They are about as likely to say it is the most important factor in their choice (22%) as the least important factor (21%). Pet owners aged 18-34 (30%) are more likely than average to say price is most important, and less likely to say it is least important (17%). Conversely, pet owners aged 55 and older (15%) are less likely than average to say that price is the most important factor in their brand choice, and more likely to say it is least important (29%).

SOURCE: "Pet Parents Survey," 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.

factoids

➤ When choosing food for their **pets**, 11% of dog and cat owners decide based on their pets' ages. *(Iams; phone: 800-446-3075)*

➤ "**Cat people**" prefer Diet Coke; "**dog people**" prefer Mountain Dew. *(Civic Science; phone: 412-559-9032)*

➤ Two thirds of **pet owners** (67%) believe their pet has a sixth sense and know when bad weather is approaching. *(Petside.com/Procter & Gamble; phone: 513-983-1000)*

➤ A slight majority of pet owners (53%) say that the bill for a **veterinary visit** is usually much higher than they expect. *(Bayer Animal Health; phone: 913-268-2577)*

relationships

Women's and men's ideas of what makes someone of the opposite sex attractive are…opposite. Men consider women who look happy to be most attractive, while women consider men who look happy to be least attractive. Similarly, women are most attracted to men who look proud, while men are least attracted to women who look that way.

Americans are becoming more open-minded about relationships; almost half are in favor of same-sex couples' rights to marry, and, as discussed in a previous chapter, the majority of adults say they could be attracted to someone of a different race/ethnicity from their own.

Half Of Americans Support Same-Sex Marriage

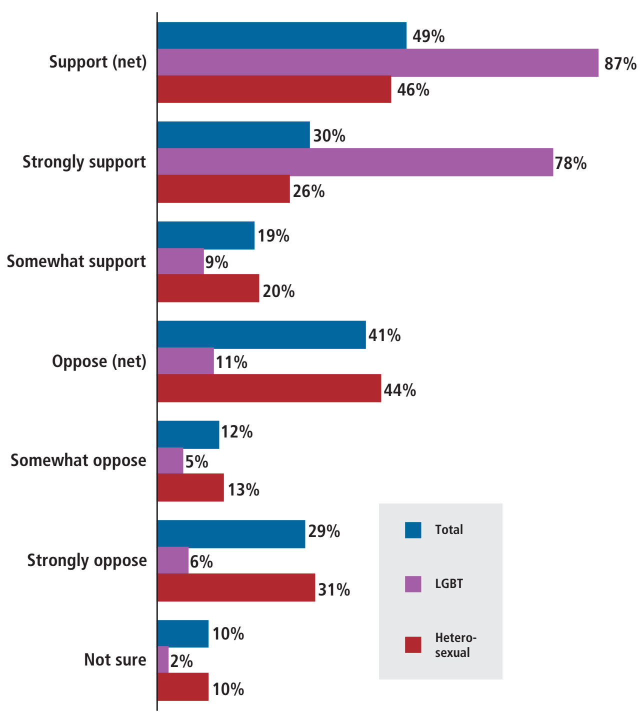
Almost half of U.S. adults (49%) support laws allowing same-sex couples to marry, according to Witeck-Combs Communications and Harris Interactive. More than half of Americans (53%) agree that same-sex marriages granted in any U.S. state should be legally recognized in all others.

Four in 10 lesbian, gay, bisexual, and/or transgender (LGBT) adults (40%) would consider changing jobs if their current position required a transfer to a state that did not recognize same-sex marriages.

Almost two thirds of LGBT Americans (65%) and 52% of heterosexuals believe that if more states pass laws granting equal marriage rights for same-sex couples, gay and lesbian families will migrate to such states.

Two thirds of LGBT (66%) and 27% of heterosexual adults think that states with same-sex marriage rights will enjoy greater economic benefits than those without such laws. Three quarters of LGBT (75%) and 46% of heterosexual adults believe that eventually same-sex marriage laws will be enacted throughout the U.S.

AMERICANS WHO SUPPORT MARRIAGE RIGHTS FOR SAME-SEX COUPLES



SOURCES: Witeck-Combs Communications, Harris Interactive

SOURCES: Witeck-Combs Communications, Bob Witeck, CEO, 2120 L St., NW, #850, Washington, DC 20037; 202-887-0500, x19; bwiteck@witeckcombs.com; www.witeckcombs.com

Weddings Are Expensive, Even For Guests

Wedding guests spend an average of $490 per person, not including buying gifts, according to American Express. Participants such as bridesmaids or best men spend $539. Americans attend an average of two weddings each year.

WEDDING EXPENSES FOR GUESTS
(average expenditure per person for attending one wedding)

Special clothing ($113 for wedding participants, such as bridesmaids)	$64
Hotel	$106
Transportation	$96
Dining out	$70
Pre-wedding parties (e.g. bachelor/bachelorette)	$56
Jewelry	$47
Arrangements for care of children/pets	$26
Other expenses	$24

SOURCE: American Express

When buying wedding gifts for close family members, consumers spend an average of $196. Half of Americans prefer to receive cash as wedding gifts, but only 32% prefer to give cash. Almost four in 10 (38%) prefer to buy gifts from registries, while 23% prefer to receive gifts from their registries.

SOURCE: American Express Spending & Saving Tracker, March 2011, Leah Gerstner, 200 Vesey St., New York, NY 10080; 212-640-3174; leah. m.gerstner@aexp.com; www.americanexpress.com. Price: Contact for information.

Weekends Are Best Time For Sex

Saturday is the most popular day for sex, according to adult products retailer Adam & Eve. Three in 10 U.S. adults (30%) who have a preferred day of the week choose Saturday, while 22% prefer Friday and 20% prefer Sunday. The most popular weekday is Wednesday (14%). Nearly two thirds (65%) have no preference.

SOURCE: Adam & Eve, Chad Davis, Marketing Director, 302 Meadowland Dr., Hillsborough, NC 27278; 919-644-8100; chad@adameve.com; www.adameve.com. Price: Contact for information.

Happy Men Are Unattractive

Men consider women who look happy to be the most attractive, but women consider men who look happy to be least attractive, according to researchers at the University of British Columbia.

When shown a series of photographs of opposite-sex people displaying facial expressions and body language indicating pride, shame, or happiness, men ranked the happy-looking women as most attractive and the proud-looking women as least attractive. Women who looked ashamed were ranked in the middle — but more attractive than those with neutral expressions.

Men didn't consider women who looked proud to be definitively unattractive — merely less attractive than those with other expressions.

In contrast, photos of proud-looking men were ranked as most attractive by women, with men who looked ashamed ranking next most attractive — above men with neutral or happy expressions.

Women older than 30 were more likely than younger women to have negative views of men who looked ashamed, and to have positive views of those who looked happy.

SOURCE: "Happy Guys Finish Last: The Impact of Emotion Expressions on Sexual Attraction," Jessica Tracy et al, University of British Columbia, April 11, 2011, *Emotion,* Journal of the American Psychological Association. Prof. Jessica Tracy, University of British Columbia, 2136 West Mall, Vancouver, B.C. V6T 1Z4; 415-902-0757; jtracy@psych.ubc.ca; www.ubc.ca. Study available online at: http://www.publicaffairs.ubc.ca/wp-content/uploads/2011/05/Happy-Guys...in-pres-Emotion.pdf

factoids

- More than a quarter of men (27%) will try to talk to an **attractive woman** sitting next to them on a plane. *(*Men's Health; *phone: 610-967-5171)*
- Two thirds of men (67%) put on **cologne** before a date. *(*Glamour; *phone: 212-286-2860)*
- Two in 10 **men** (21%) hold in their stomachs the first time a woman sees them naked. *(*Glamour *magazine; phone: 212-286-2860)*
- Fans of the band Coldplay are less likely than fans of 20 other pop bands to have **sex on a first date**. Fans of Nirvana are most likely to do so. *(Tastebuds Media; phone: 011-44-20-7267-8549; hello@tastebuds.fm)*
- Fifteen percent of single African Americans think people should **wait until marriage** to have sex; 5% think it's a good idea to have sex on the first date. *(*Ebony *magazine; phone: 312-322-9429)*
- More than one in 10 women who sleep with partners (14%) would consider getting **separate beds** if it would help them get a better night's sleep. *(*Women's Health *magazine; phone: 212-808-1683)*
- 72% of people tilt their heads to the right when **kissing**. *(University of Amsterdam; phone: +31-20-525-9111)*
- Adults age 18-34 are three times more likely than those age 35-54 to complain about **brands** on the companies' Facebook pages. *(Lightspeed Research; phone: 908-605-4480)*
- Almost two thirds (65%) of Internet users have viewed **wedding photos** on a social network; 3% have seen funeral pictures. *(Lightspeed Research; phone: 908-605-4480)*
- One in 10 Facebook users (10%) have falsely changed their **relationship status** on the site to "in a relationship" in an attempt to make an ex-partner jealous. *(Amy Muise, Psychology Department, University of Guelph, Ontario; phone: 519-824-4120; amuise@uoguleph.ca)*
- Six in 10 shoppers (60%) plan to buy something other than flowers or chocolates for their significant other for **Valentine's Day**; 18% plan to give a gift card. *(eBillme; phone: 613-270-8755, x3400)*
- Americans who celebrate **Valentine's Day** planned to spend an average of $68.98 on romantic partners, $6.30 on friends, $5.04 on pets, $4.97 on teachers or classmates, and $3.41 on coworkers. *(National Retail Federation; phone: 202-783-7971)*
- More than three quarters (77%) of adults say they'd be more upset if their partners didn't get them anything for **Valentine's Day** than if their partners got them gifts they didn't like. Those who are in longer-term relationships are more likely than those in shorter ones to say they'd be more upset to receive a gift they didn't like than to receive nothing at all. *(DDB Worldwide Communications Group; phone: 312-552-6439)*
- Almost half of African Americans ages 13-21 (48%) have lied to get out of uncomfortable **sexual situations**. *(*Essence *magazine; phone: 212-522-1212)*

shopping & spending

Cross-channel shopping — shopping online and off, via Internet or mobile, and often combining two or more channels in the same shopping mission — has become the new norm. Retailers that create a consistent shopping and customer service experience across all of their channels will have a significant advantage over their competitors. What do cross-channel shoppers (read: everybody) want? Consistency, convenience, and personalization. If a store doesn't have an item in stock, the customer wants the salesperson to be able to search inventory at other stores and have it sent. Shoppers want pricing and promotions to be consistent from mobile to website to physical store. They want the telephone sales rep to have access to the same buying history as the website, and to have a tailored shopping experience in any medium. Perhaps most of all, they want to be able to pick up or return items purchased online or via mobile in-store.

Having constant access to product, price, and promotion information, as well as a direct line to consumer reviews and friends' feedback, has given consumers an unprecedented level of empowerment. It has also altered the trajectory of the shopping process; research — including gathering and giving opinions — is now ongoing, up to and even after the moment of purchase. More than half of online shoppers believe the Internet has made them less impulsive.

Smartphone owners have higher expectations of retailers but are more open to giving out personal information in exchange for a customized shopping experience. Mobile shopping has also reinvigorated brick-and-mortar shopping, as consumers can combine the Internet's unlimited access to information, reviews, and promotions with being able to see and touch products. The key is to remember that mobile shoppers and online shoppers are not separate audiences (and they will become less so over time as ownership of smartphones and mobile devices expands), and they will use whichever channel meets their needs at the moment.

This chapter also includes seasonal spending forecasts to provide an understanding of how consumers perceive their anticipated shopping and spending behavior while they're in the midst of it.

Consumer Spending: Weary Of Holding Back, They're Still Cautious About Money

Although the National Retail Federation predicts a 4% increase (to $2.47 trillion) in total retail sales in 2011, U.S. consumers are spending less on daily purchases so far this year than they did in 2010. Americans spent an average of $58 per day in January 2011, down 6% from $62 in January 2010, and 40% lower than the $97 spent daily in January 2008, according to Gallup (calculations by Research Alert).

Spending varies by age, geography, gender, and income. Women spend less than men do on a daily basis, but their spending rose between January 2010 and 2011, while men's declined. Consumers who live in the Eastern states spent slightly more in January 2011 than they did the previous January, while those in the Midwest spent significantly less from one year to the next.

While upper-income adults spend about twice as much per day as their lower- and middle-income counterparts, both groups spent less in January 2011 than in January 2010.

Four in 10 adults (40%) expect to spend about the same amount in 2011 as they did in 2010, according to a separate study by American Express. More than one in 10 (14%) say they'll spend more this year than last year.

Spending Priorities

During an extended period of economic difficulties, people across a wide range of incomes and family situations have to make decisions about what they can and cannot do without. Some goods and services that make acceptable short-term sacrifices become harder to say no to over the long haul. Clothes and shoes wear out, hair grows, and so on.

When asked what they can do without, and what they consider essential, consumers say they'll readily go without luxuries such as upscale cosmetics, jewelry, and handbags; spa services such as manicures/pedicures and facials; dinners at fine restaurants; and some forms of entertainment, according to a BIGresearch survey for the National Retail Federation.

They're not willing to give up the technologies that keep them connected to one another, however — 82% consider their home Internet service essential, and 64% wouldn't go without (basic) mobile phone service. This may reflect the increasing value of these technologies as entertainment portals as well.

Some sacrifices are a matter of degree. For example, while 89% of adults are willing to give up shopping for apparel at specialty stores and 75% at department stores, only 48% would give up shopping for clothes at discount stores.

Similarly, 61% consider basic cable or satellite TV essential, but only 27% feel that way about premium cable or satellite service. Nine in 10 will give up fine dining, but fewer are willing to forego eating at casual sit-down restaurants (68%) or fast-food places (61%).

There are some interesting — and in some cases surprising — demographic variations in what people consider essential or expendable.

Women are more willing than men to give up new jeans (79% vs. 73%) and shoes (72% vs. 68%) — though they're less likely to be willing to stop shopping for clothes at discount stores (43% vs. 53%).

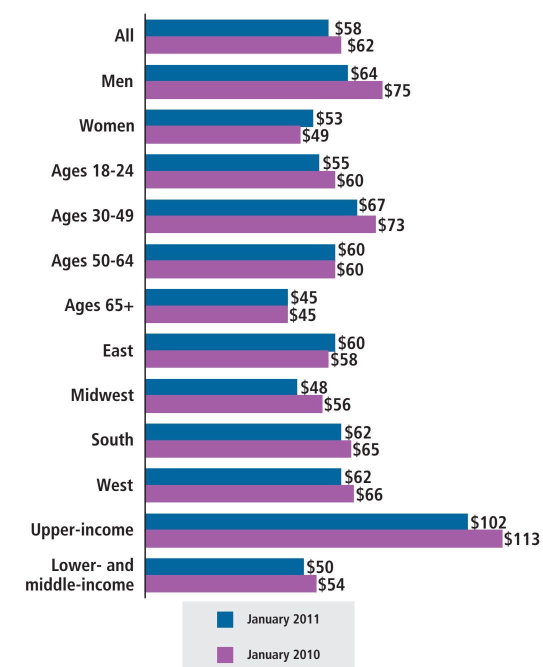
Women are also more strongly attached to their Internet service (84% consider it essential, compared to 79% of men). As evidence of the Internet's status as a fully mainstream medium, consumers' unwillingness to give it up increases with age. The study authors believe that younger consumers' greater willingness to give up Internet service may reflect the increasing availability of wi-fi.

Young adults ages 18-34 are less willing than adults overall to give up a variety of goods and services, such as organic and gourmet foods, spa services, mobile Internet and upgraded mobile devices, fine dining, on-demand video streaming services, and gym memberships. They're less likely than other adults to have already cut back, and more likely to say they plan to do so shortly.

Interestingly, among those who wouldn't consider giving up their upgraded mobile phones, there's little difference by income level: 22% of those with incomes of less than $50,000 and 24% of those with incomes of $50,000 and above consider them essential.

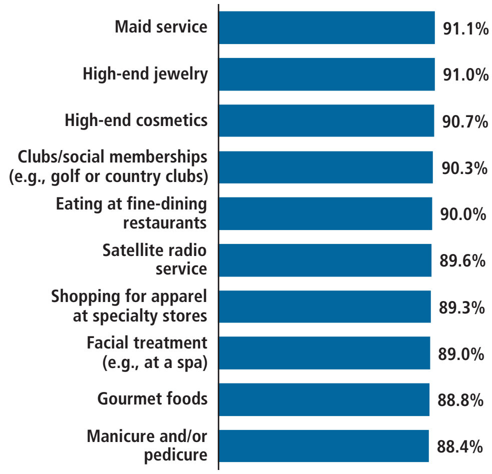
Consumers plan to spend more this year than they did last year on personal grooming (73%), health/fitness (70%), and clothing for themselves (61%), according to American

U.S. CONSUMERS' AVERAGE DAILY SPENDING, JANUARY 2011 VS. JANUARY 2010



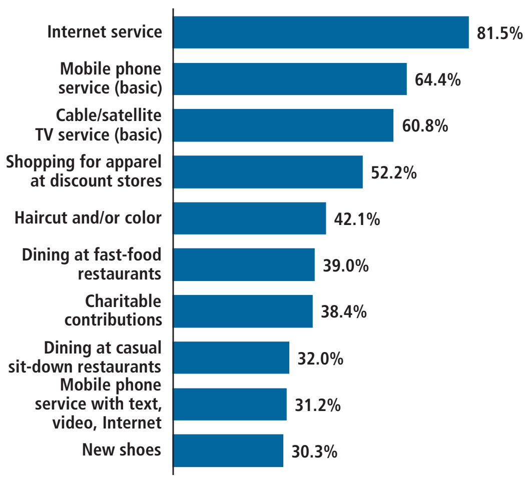
SOURCE: Gallup

TOP 10 ITEMS U.S. CONSUMERS CONSIDER EXPENDABLE
(% who would give up item to save money)



SOURCE: BIGresearch for National Retail Federation

TOP 10 ITEMS U.S. CONSUMERS CONSIDER ESSENTIAL
(% who would not give up item to save money)



SOURCE: BIGresearch for National Retail Federation

Express. They're least likely to increase their spending on tablet computers or e-book readers (30%), portable media players (32%), jewelry (34%), and videogame systems and games (34%).

Retail Channels

When asked where they're shopping more frequently, compared to a year ago, consumers say they're patronizing superstores, discount grocery stores, and drugstores most, according to a separate study by BrandSpark for *Better Homes and Gardens*. They're visiting gourmet or specialty food stores, natural food stores, and convenience stores less frequently than last year.

When choosing where to shop for food, beverages, health and beauty aids, or household products, consumers are most concerned with freshness, low prices, and finding what they need in stock. They're less likely to be motivated by the availability of recipes, in-store samples, or a wide variety of organic products.

Six in 10 consumers (63%) say they're likely to buy products that are recommended by others, and three quarters (75%) like sharing their opinions. Eight in 10 (80%) love telling friends and family when they've gotten a good deal.

Although the majority (78%) take pride in the things they own (48% agree and 30% agree completely with the statement), fewer than half believe that people are judged by their possessions (35% agree and 10% agree completely).

Good And Bad Experiences

More than one in five consumers (21%) who had good experiences with online retailers during the 2010-2011 holiday season recommended the retailers to friends, according to a separate study by Harris Interactive for customer experience management company RightNow.

Nearly a third (31%) made additional purchases from these retailers, and 13% posted positive reviews online. Almost three in 10 (28%) online shoppers read customer reviews on social networking and review sites as part of their information-gathering process for online shopping.

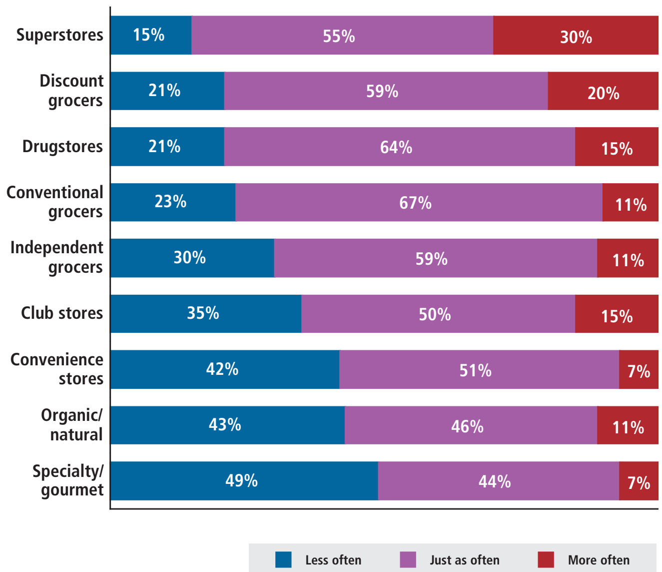
Consumers who feel their complaints are being taken seriously tend to respond favorably. More than two thirds (68%) of customers who posted complaints or negative reviews on social networking or review sites about specific retailers received responses from the retailers.

Of these, 34% deleted their negative reviews after being

MOST IMPORTANT FACTORS WHEN SHOPPING FOR FOOD, HEALTH & BEAUTY, OR HOUSEHOLD PRODUCTS

SOURCE: BrandSpark for *Better Homes and Gardens,* January 2011 contacted by the retailers, 33% subsequently posted positive reviews, and 18% made further purchases from the retailers.

STORES CONSUMERS ARE SHOPPING MORE OFTEN THAN THEY DID A YEAR AGO



SOURCE: BrandSpark for *Better Homes and Gardens,* January 2011

SOURCES: "Retail Sales Outlook 2011," National Retail Federation, Matthew Shay, President/CEO, 325 7th St., NW, #1100, Washington, DC 20004; 202-783-7971; shaym@nrf.com; www.nrf.com. Price: Free to NRF members; call for price information for non-members. Also, "Adjusting to the New Normal," *Stores* magazine, February 2011, Susan Reda, Executive Editor; 516-437-1245; redas@nrf.com.

"Gallup Daily Tracking, January 2011," Gallup, Dennis Jacobe, Ph.D., Chief Economist, 901 F St., NW, Washington, DC 20004; 202-715-3030; dennis_jacobe@gallup.com www.gallup.com. For product and price information, contact: Eric Nielsen; eric_nielsen@gallup.com.

"American Express Spending and Saving Tracker," American Express, Christine Elliott, 200 Vesey St., New York, NY 10285; 212-640-0622; christine.s.elliott@aexp.com; www.americanexpress.com. Price: Contact or visit https://businessinsights.americanexpress.com for information.

"American Pulse Survey, December 2010," BIGresearch, Phil Rist, EVP Strategic Initiatives, 450 West Wilson Bridge, #370, Worthington, OH 43085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Contact for information.

"American Shopper Study," *Better Homes and Gardens*, Christina Poletto, 375 Lexington Ave., New York, NY 10017; 212-551-7189; christina.poletto@meredith.com; www.bhg.com. Price: This study is proprietary.

BrandSpark International, Robert Levy, President & CEO, 1075 Bay St., #1002, Toronto, ON M5S 2B1, Canada; 647-727-4578; rlevy@brandspark.ca; www.brandspark.ca

"The Retail Consumer Report, 2011," RightNow, Greg Gianforte, CEO, 136 Enterprise Blvd., PO Box 9300, Bozeman, MT 59718; 406-522-4200; ggianforte@rightnow.com; www.rightnow.com. Price: This study is available for download at no charge.

Looks, Financial Goals Take Priority In 2011

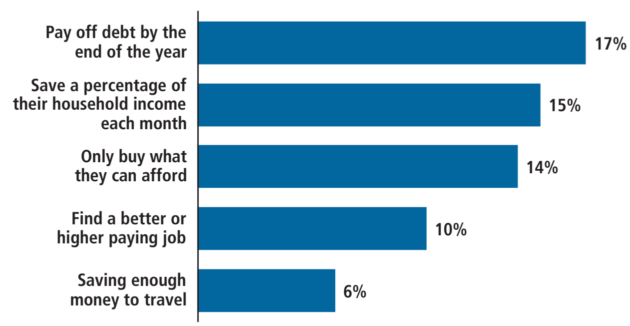
A slight majority of Americans are planning to spend more (14%) or the same amount (40%) in 2011 as they did in 2010, with the remaining 46% planning to spend less, according to American Express.

Many are focusing on looking good, with 73% planning to spend on grooming, 70% on health and fitness, ad 61% on clothing. Nearly half (47%) are planning to increase their spending on health and fitness, with their primary expenditures including:

- Gym membership (average of $131 per month);
- Fitness equipment (average of $127 per month);
- Personal trainer (average of $127 per month);
- Eating programs (average of $75 per month); and
- Fitness-related videogames (average of $60 per month).

The vast majority (83%) have set financial goals for 2011, down slightly from the 89% who did so in 2010. They plan to increase their savings an average of $2,600 during the course of the year.

MOST COMMON FINANCIAL GOALS, 2011



SOURCE: American Express

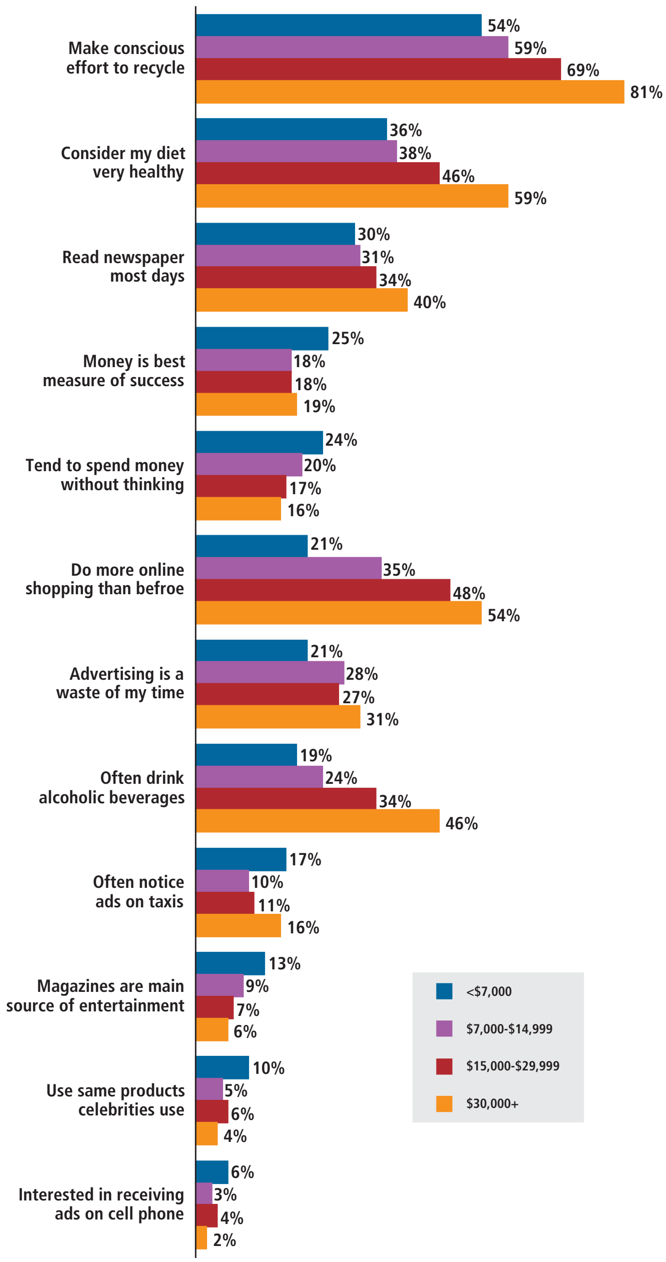
SOURCE: "Spending & Saving Tracker, January 2010," American Express, Mona Hamouly, 200 Vesey St., New York, NY 10285; 212-640-0572; mona.l.hamouly@aexp.com; www.aexp.com.

Discretionary Spending $1.5 Trillion

More than a quarter (28%) of Americans' annual spending is on discretionary purchases, such as entertainment and dining out, according to Experian Simmons. The average U.S. household spends $12,800 each year on such purchases; in all, Americans spend $1.47 trillion annually on discretionary items. While the most lavish spenders are small in number, they account for more than a tenth (11%) of all discretionary spending in the U.S. Households with incomes of $250,000 or more spend nearly 10 times more on discretionary items than those with incomes of less than $25,000.

Minority households account for a quarter (25%) of total discretionary spending in the U.S. Hispanic households spend more than $132.1 billion, Black households spend

U.S CONSUMERS' ATTITUDES BY ANNUAL DISCRETIONARY SPENDING



SOURCE: Experian Simmons

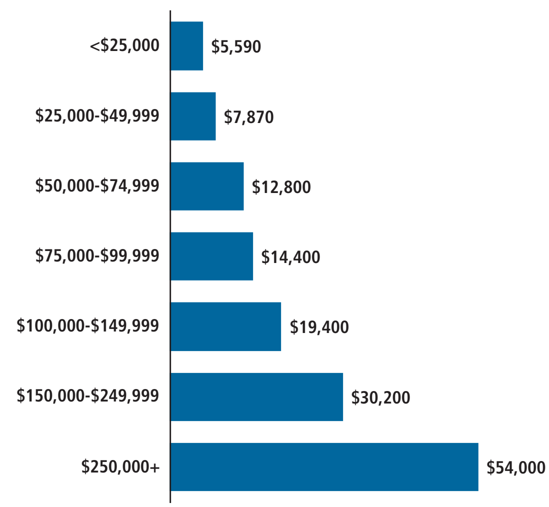
$113.8 billion, and Asian households spend $85.3 billion annually on discretionary purchases.

People spend differently depending on their income levels, even for discretionary purchases. Households with the highest levels of discretionary spending are more likely than those with lower spending to own flat-panel TVs, DVRs, e-Book readers, and water filtration systems. They're also more likely to have pet dogs. Lower-spending households are more likely than higher-spending ones to buy disposable cameras and baby furniture.

Discretionary spending is indicative of other aspects of lifestyle and attitudes as well, including media use, eating habits, shopping motivations, and feelings about advertising.

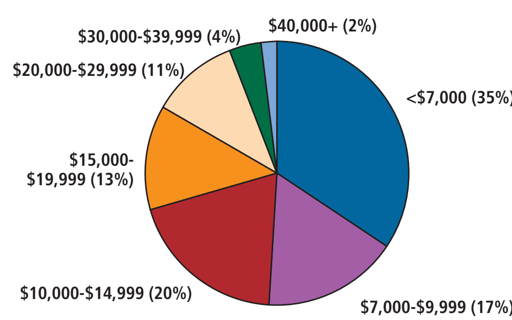
For example, those who spend $30,000 or more on discretionary purchases annually are 44% more likely than the average consumer to enjoy driving "faster than normal." Consumers who spend less than $7,000 on discretionary purchases are 18% more likely than average to say they often drive alone for the sense of freedom it gives them. The highest-spenders are 50% more likely than average to say they like to have control over people and resources, while the lowest-spenders are 21% more likely than average to feel that money is the best measure of success.

ANNUAL DISCRETIONARY SPENDING, BY HOUSEHOLD INCOME



SOURCE: Experian Simmons

DISTRIBUTION OF U.S. HOUSEHOLDS BY ANNUAL DISCRETIONARY SPENDING



SOURCE: Experian Simmons

SOURCE: "The 2011 U.S. Discretionary Spending Report," Experian Simmons, 1271 Ave. of the Americas, 45th Fl., New York, NY 10020; 800-918-9064 or 212-598-5400; simmonsmarketing@experian.com; www.experian.com/simmons. Price: Available for download with registration.

Shoppers Want Consistency Across Channels

As cross-channel shopping becomes the norm, consumers want a consistent shopping experience with seamless transitions among online, retail, and mobile, according to the E-tailing Group. The study asked shoppers about both their current shopping experiences and what an ideal cross-channel shopping experience would include. Key factors are:

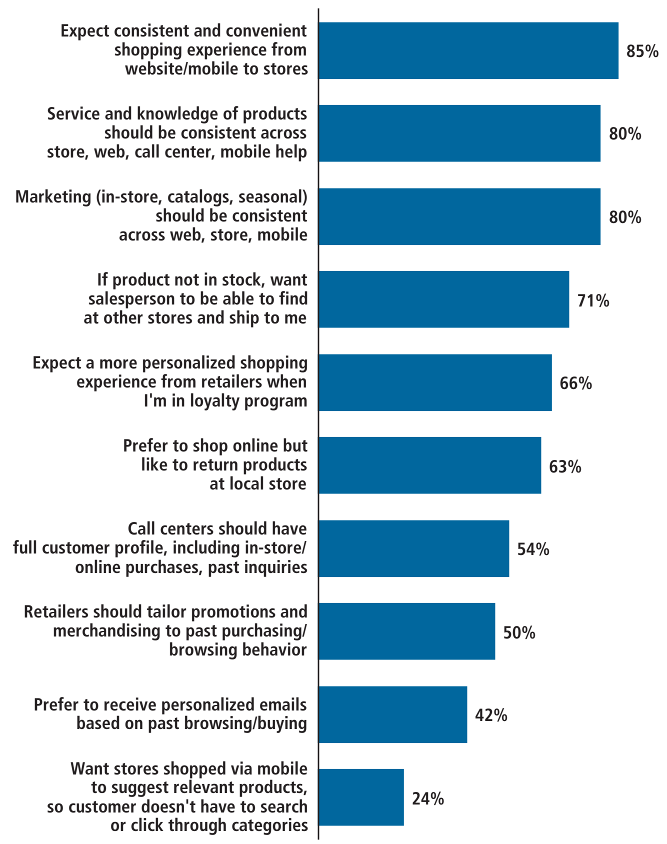
- Consistency in product inventory, pricing, and customer service across all channels
- Ease of purchasing and returns — especially the ability to return online or mobile purchases in-store
- Personalization — loyalty programs, promotion, and merchandising based on past purchases
- Fluid switching between channels, such as ability to send merchandise from another store or pick up product purchased online.

So far the retailers offering the best cross-channel shopping experiences are Best Buy, Amazon, and Walmart.

When asked about their current cross-channel shopping priorities, consumers are most likely to say that a combination of in-store and online shopping meets their needs best (67%), but the researchers say the rapid growth of mobile shopping suggests that mobile and social shopping will become significant channels in the near future.

FACTORS CONSUMERS CONSIDER IMPORTANT IN IDEAL CROSS-CHANNEL SHOPPING ENVIRONMENT

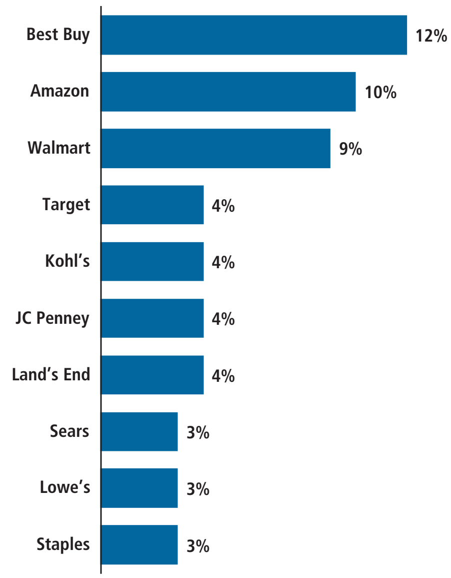
(% who consider it very or somewhat important)



SOURCE: The E-tailing Group

RETAILERS PROVIDING BEST CROSS-CHANNEL SHOPPING EXPERIENCE

(Open-ended responses)



SOURCE: The E-Tailing Group

10 MOST COMMON WAYS CONSUMERS USE VARIOUS SHOPPING CHANNELS

1. Compare prices online/buy online
2. Compare prices online/buy in store
3. Shop online/buy in store
4. Shop in-store/buy online
5. Research online/buy in store
6. Research online/buy online
7. Buy online; pick up in store
8. Buy online/return in store
9. Research on mobile/buy on mobile
10. Research on mobile/buy in store

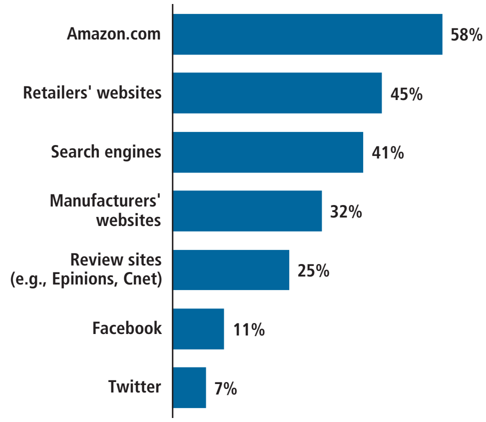
SOURCE: The E-Tailing Group

SOURCE: "Closing the Cross-Channel Gap," July 2011, The E-Tailing Group, Lauren Freedman, President, 1444 W. Altgeld St., Chicago, IL 60614; 773-975-7280; lf@e-tailing.com; www.e-tailing.com.

Shoppers Seek Out Other Consumers' Opinions, But Not Through Social Networks

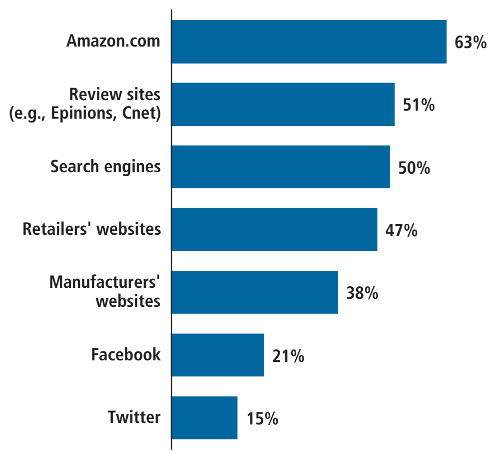
Consumer reviews and ratings of products are the most trusted form of online information, but shoppers are much more likely to look for them on retailers' sites and search engines than on social networks, according to The E-Tailing Group. About one in 10 online shoppers frequently seek out consumer reviews/ratings on Facebook or Twitter, com-

WHERE ONLINE SHOPPERS LOOK FOR CONSUMER-GENERATED REVIEWS OR RATINGS
(% who look all the time or very often)



SOURCE: The E-Tailing Group

MOST RELIABLE SOURCES OF CONSUMER REVIEWS AND RATINGS, ACCORDING TO ONLINE SHOPPERS, 2011
(% who consider them extremely or very credible)



SOURCE: The E-Tailing Group

pared to nearly six in 10 who look for them on Amazon.

Consumer reviews on Amazon, review sites, and search engines are considered most reliable. Even the websites of manufacturers and retailers are considered more credible sources of consumer reviews than social networks are.

Despite increasing participation in social networks and the growing importance of checking opinions of both friends and strangers as part of the product research process, shoppers appear to view social networks and shopping as separate spheres.

Nearly half of online shoppers (49%) say they never go to social sites such as Facebook and Twitter to do research and get ideas for their shopping missions. Another two in 10 (22%) say they rarely visit these sites for shopping research.

The majority of shoppers start their online product research with search engines or retailers' websites. When shopping for products typically requiring a lot of research — such as computers, electronics, or appliances — 71% spend more than a day doing research before buying. More than a third (37%) spend a week or more.

Half of online shoppers (50%) say product research takes up 75% or more of the total time they spend shopping online; 15% say it takes up 90% or more.

SOURCE: "The 2011 Social Shopping Study, Brief 1: Consumer Research Dynamics, Mobile and User-generated Content," June 2011, The E-Tailing Group, Lauren Freedman, President, 1444 W. Altgeld St., Chicago, IL 60614; 773-975-7280; lf@e-tailing.com; www.e-tailing.com. Price: Contact for information.

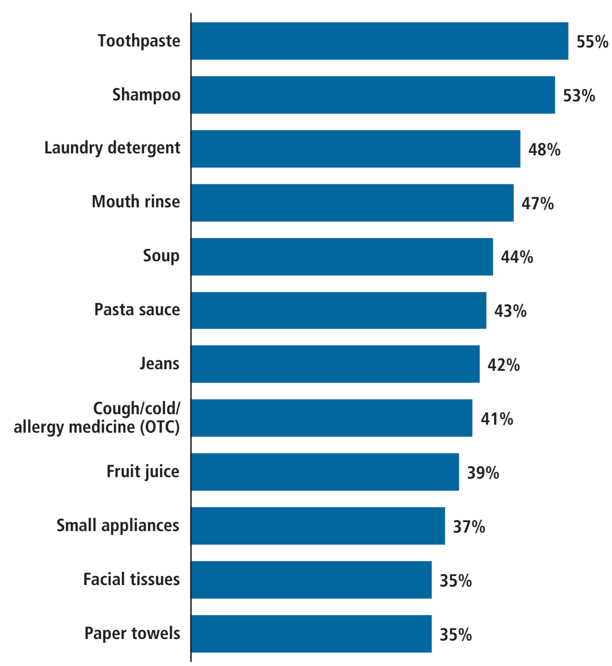
Shoppers Sacrifice Favorite Brands For Lower Prices More Than Half The Time

Fewer than half of shoppers (43%) typically buy the brands they want most, down 20% from 2008, according to comScore (calculations by Research Alert). Purchasing behavior differs by product category; consumers are most likely to buy their preferred brands when shopping for toothpaste or shampoo, and least likely to do so when shopping for household paper products.

The Internet is the top resource for price comparison among consumers under age 60, although those 60 and older rely most on newspapers.

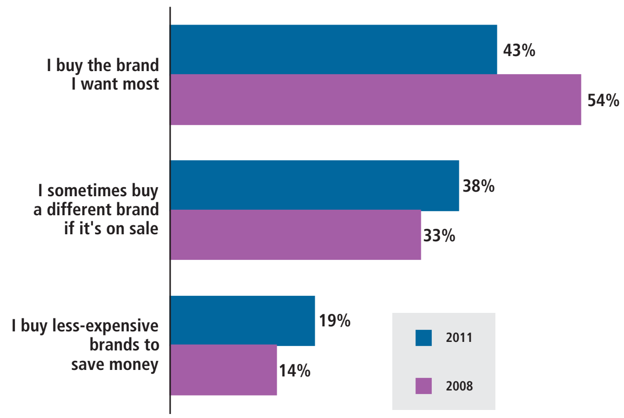
If asked to choose among having brands reduce the quality of ingredients by 10%, reduce the quantity per package

CONSUMERS WHO BUY THE BRAND THEY WANT MOST, BY SELECTED PRODUCT CATEGORIES, 2011



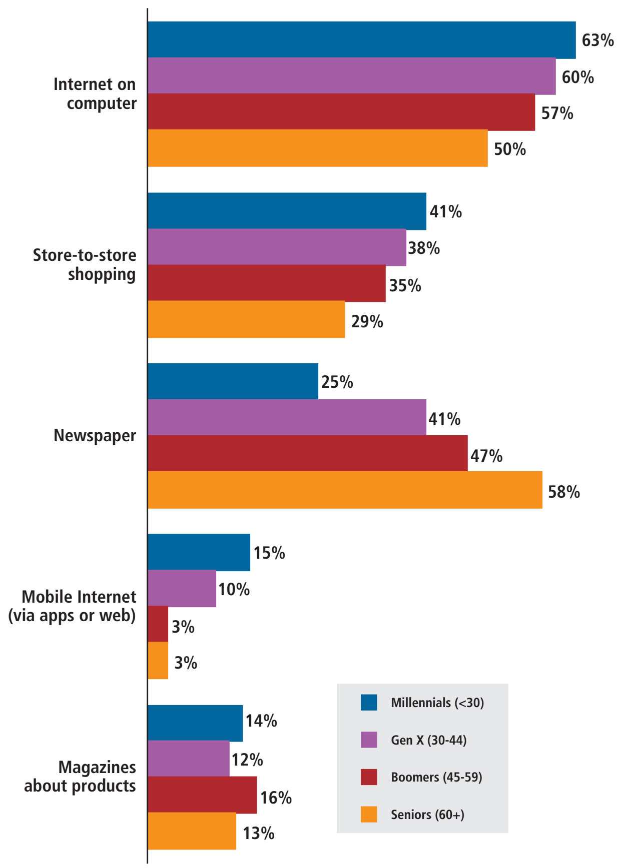
SOURCE: comScore

HOW CONSUMERS CHOOSE WHICH BRANDS TO BUY, 2011 VS. 2008



SOURCE: comScore

RESOURCES U.S. SHOPPERS USE TO COMPARE PRICES, BY GENERATION



SOURCE: comScore

by 10%, or increase the price by 10%, shoppers would choose to have the package size decreased. Just over half of consumers (54%) say they will occasionally change their brand choice if the company downsizes the package, while 32% say they won't change, and 14% say they usually or always will. Consumers are most tolerant of price hikes in jeans and small appliances.

SOURCE: "The Effects of the Recession on Brand Loyalty and 'Buy Down' Behavior: 2011 Update," October 2011, comScore, Stephanie Flosi, Senior Marketing Communications Analyst, 233 S. Wacker Dr., #3400, Chicago, IL 60606; 312-777-8801; sflosi@comscore.com; www.comscore.com

Small Errands Dominate Shopping Trips

Most shopping trips are small to medium-sized errands, either quick runs to pick up items for immediate needs or fill-in trips to get items forgotten on the last trip or needed before the next big trip, finds Nielsen. Shopping patterns vary by retail channel and income level, and change over time. Economic hardship tends to shift purchase patterns toward smaller trips, as consumers feel less confident spending large amounts of money at once, even though bigger packages are generally better values.

Convenience, drug, and dollar stores rely on small trips for most of their sales; supercenters and warehouse clubs consider large, stocking-up trips their bread and butter; and mass merchants and grocery stores attract a mixture of large, small, and medium-sized trips.

Looking at patterns of shopping between 2008 and 2010, however, consumers did an increasing amount of buying against retail "type."

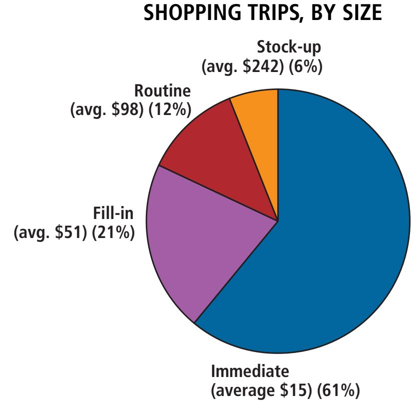
For example, affluent consumers (incomes of $100,000 and above) made more frequent and larger trips to drug, convenience, and dollar stores, while at the same time increasing their small trips to large-format stores such as supercenters and warehouse clubs.

Upper-middle income households ($70,000-$99,999) also increased the number of small trips to club stores and supercenters, while reducing their large trips overall.

Households with incomes of $50,000-$69,999 and $40,000-$49,999 shopped less frequently but took advantage of the values offered by supercenters and dollar stores.

Households with incomes of $20,000-$29,999 reduced their stocking-up trips by 10% across all channels, but made small trips to supercenters and club stores, as well as dollar

SHOPPING TRIPS, BY SIZE



SOURCE: Nielsen

stores. Those with incomes below $20,000 shifted their grocery buying to fewer, larger trips to stock up on necessities.

Food shopping accounts for the largest proportion of dollar sales, as well as being the prime motivator for small trips.

TOP 10 PURCHASES ON SHOPPING TRIPS FOR IMMEDIATE NEEDS

1. Milk
2. Bakery
3. Pet care
4. Cheese
5. Salty snacks
6. Soft drinks
7. Frozen meals
8. Fresh produce
9. Ice cream
10. Ready-to-eat cereal

SOURCE: Nielsen

SOURCE: Nielsen, Todd Hale, SVP Consumer and Shopper Insights, 770 Broadway, New York, NY 10003; 646-654-5000; www.nielsen.com

Americans Spending Less On Luxe Furniture But More On Clothes

Consumer spending on luxury furniture and home décor items decreased 14% between first quarter 2010 and 2011, according to American Express Business Insights. Ultra-affluent consumers cut back even more than overall consumers, decreasing their spending on furniture and décor by 22%.

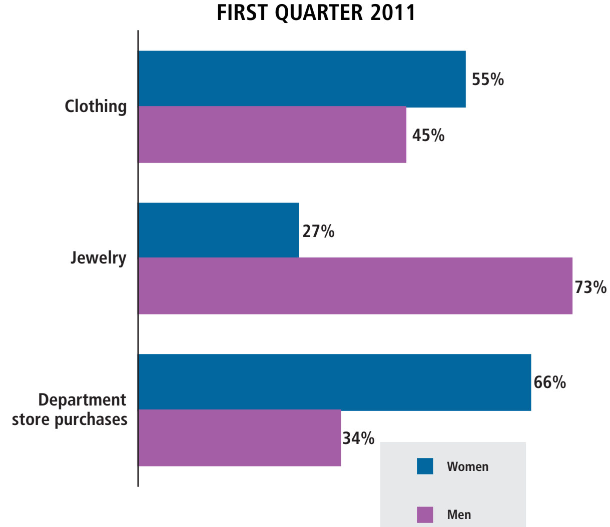
Other retail sectors saw modest growth between 2010 and 2011; consumers spent 3% more on luxury apparel and accessories (ultra-affluents spent 2%), and 5% more on jewelry.

Consumers shopped for clothes and jewelry less frequently but spent more on each outing: The average transaction size for clothing purchases grew 8%, and jewelry spending per transaction grew 15%.

Post-holiday sales encouraged consumers to keep shopping at department stores; overall spending in this channel grew 4% over first quarter 2010. Transaction size grew 3%, and volume grew 2%.

SOURCE: "Q1 2011 Spend Sights Report Luxury Retail: Furniture & Home Furnishings, Apparel & Accessories, Jewelry, and Department Stores, Q1 2011 vs. Q1 2010," American Express, Sarah Meron, VP Public Affairs and Communications – Corporate and Marketing, 200 Vesey St., New York, NY 10281; 212-640-5503; sarah.b.meron@aexp.com; www.americanexpress.com/businessinsights

GENDER DISTRIBUTION OF LUXURY PURCHASES, FIRST QUARTER 2011



SOURCE: American Express

Millennials Are Highly Engaged With Brands

Eight in 10 U.S. Millennials (80%) say once they find a company or product they enjoy, they will continue purchasing it, according to Edelman and StrategyOne. Two in three (64%) will share more personal information with these trusted brands. The global report of those living in the U.S., Brazil, Canada, China, Germany, India, Italy, and the UK also finds:

- 86% consult at least three information sources — including search engines, family members, and social networks — before purchasing new technology; 31% consult at least seven.
- 74% have talked to a friend about a favorite brand in the prior week; 54% discussed a product they didn't like.
- 76% believe friends and family members highly value their opinions on potential purchases.
- 20% have attended a brand-sponsored event in the last 30 days; of those 65% purchased a product featured at the event.
- 25% have joined at least seven brand-sponsored online communities.
- 57% would volunteer to try a new product from a trusted brand and post a review online.
- 47% write about positive experiences with brands online; 39% post negative experiences.

CATEGORIES FOR WHICH MILLENNIALS HAVE RECOMMENDED THAT A FRIEND OR FAMILY MEMBER PURCHASE A PRODUCT DURING PRIOR MONTH

Food	54%
Electronics	39%
Personal care products	37%
Clothing	35%
Beauty products	35%
Cleaning products	24%
Cooking products	19%
Pet products	19%

SOURCES: Edelman, StrategyOne

SOURCES: Edelman, Alex Abraham, Consumer Marketing 200 E. Randolph St., 63rd Fl., Chicago, IL 60601; 312-240-3000; alex.abraham@edelman.com; www.edelman.com.

StrategyOne, Chuck Brinker, Primary Market Research, 200 E. Randolph St., 62nd Fl., Chicago, IL 60601; 312-240-2794; chuck.brinker@strategyone.com; www.strategyone.com.

Six in 10 Consumers Donate To Causes

More than nine in 10 U.S. adults (96%) can name at least two causes that have personal significance to them, and 61% have donated money to causes in the past year, according to public relations and events firm MSL Group. Although most adults (95%) can name two or three causes that they'd like to see companies support, only 37% have purchased products in the past year because the brands or companies support specific causes.

Consumers consider being ethical to be part of the definition of a "leading company," and 68% say they expect companies they do business with to support causes. At the same time, however, they're skeptical of corporate motives; 67% think companies only support causes in order to sell more product, and 74% say there's often a disconnect between the causes companies choose to support and the types of products they manufacture.

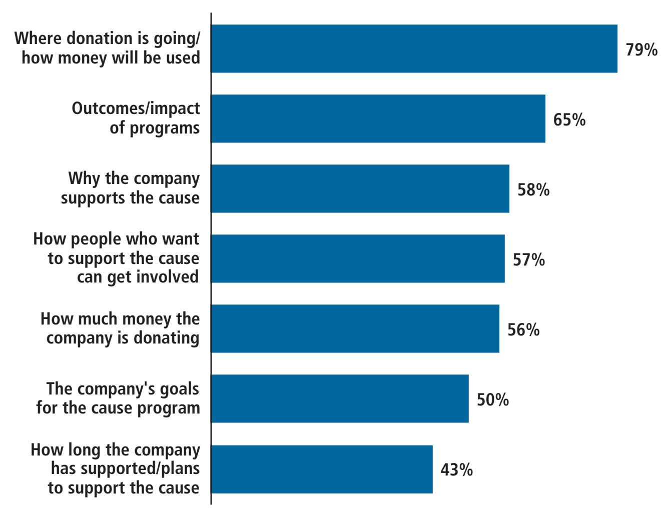
Nearly eight in 10 (78%) think most companies play it too safe when supporting causes — avoiding tackling tougher or more controversial social issues.

Consumers want companies to be upfront about their involvement in causes, and to give detail on why and how they're supporting particular causes.

Almost half of adults (48%) — and 79% of 18-24-year-olds — express their support for causes through "liking" them and discussing them with their contacts on social media such as Facebook. Causes Americans consider most important to them personally include education, health/disease prevention, animal rights/protection, environmental protection, and hunger. Consumers are most likely to have donated time and/or money to hunger and disaster relief in the past year, while they most want to see companies address education and the environment.

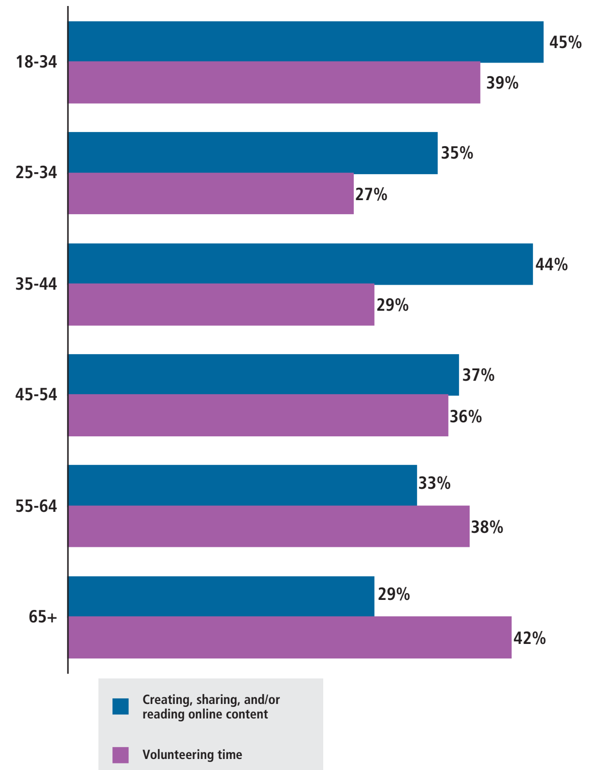
ASPECTS OF CORPORATE SUPPORT OF CAUSES CONSUMERS WANT COMPANIES TO DISCLOSE/COMMUNICATE

(% who consider it very important)



SOURCE: MSL Group

CONSUMER SUPPORT OF CAUSES: CREATING, READING, OR SHARING ONLINE CONTENT VS. VOLUNTEERING TIME



SOURCE: MSL Group

SOURCE: "MSL Group 2011 Social Purpose Index," Spring 2011, MSL Group, Scott Beaudoin, SVP, North America Director of Cause Marketing and CSR, 1675 Broadway, 9th Fl., New York, NY 10019; 212-468-4200; scott.beaudoin@mslgroup.com; www.mslgroup.com

Consumers Favor Easy-To-Enter Promos

Just over half of consumers (51%) say sponsorships influence their purchase decisions, but only 9% say they're highly influential, according to The Integer Group and M/A/R/C Research. The top two reasons consumers don't participate in promotions are feeling that their chances of winning a prize are low (33%) and feeling that the promotion requires them to share too much personal information.

The most popular methods for entering promotions are entering a code online, using an on-pack instant-win game, or scanning a loyalty card. Promotions requiring more physical effort to enter, such as collect-to-win, sending text messages or mailing in entry forms, are less popular.

The majority of consumers would prefer to be offered a modest prize with a reasonable chance of winning rather than a large price with a lower chance of winning.

SOURCE: "The Checkout, Issue 5, 2011: Sponsorship & Promotions Report," The Integer Group and M/A/R/C Research. The Integer Group, Craig Elston, SVP Insight & Strategy, 7245 W. Alaska Dr., Lakewood, CO 80226; 303-393-3000; celston@integer.com; www.integer.com and www.shopperculture.com. M/A/R/C Research, Randy Wahl, EVP Advanced Analytics, 1660 N. Westridge Cir., Irving, TX 75038; 800-884-6272; randy.wahl@MARCresearch.com; www.MARCresearch.com

U.S Households Spend $12,800 On Entertainment, Restaurants

An estimated 28% of Americans' annual spending is on discretionary goods and services, according to Experian Simmons. The typical U.S. household spends $12,800 on purchases such as entertainment, dining out, and personal care. Nearly half of U.S. households (52%) spend less than $10,000 on discretionary purchases each year, including 35% who spend less than $7,000. Some 6% of homes spend at least $30,000.

SOURCE: Experian Simmons, Jennifer Marshall, 955 American Ln., Schaumburg, IL 60173; 224-698-8798; jennifer.marshall@experian.com; www.experian.com.

"Fashionistas" Are Influenced By Friends

Women who follow fashion trends closely ("Fashionistas") are more likely than other women ("Commonistas") to be influenced by friends' recommendations about clothing, according to Cotton Inc.

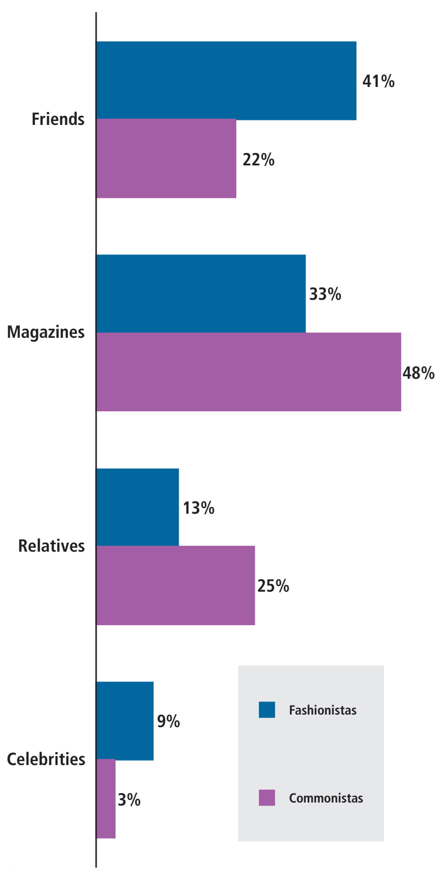
Fashionistas, who represent a third of women, are defined as being committed to fashion trend purchases and changing their apparel styles frequently. Commonistas are less sensitive to trends and prefer a more consistent clothing style.

Commonistas prefer to buy a complete outfit at a single store, while Fashionistas like to put together outfits from items purchased at a variety of stores.

Fashionistas (57%) are more likely than Commonistas (44%) to be optimistic about their personal finances.

Fashionistas are younger (average age of 35, vs. 43 for Commonistas), more likely to be single (42% vs. 27%), and to have kids at home (55% vs. 43%).

TOP INFLUENCES ON CLOTHING PURCHASES, FASHIONISTAS VS. COMMONISTAS



SOURCE: Cotton Inc.

SOURCE: "Insights: Retail Feels the Fashionista Influence," Cotton Inc. Lifestyle Monitor, 488 Madison Ave., New York, NY 10022; 212-413-8300; supplychaininsights@cottoninc.com; www.lifestylemonitor.cottoninc.com. Price: Available online, free of charge.

For Bra Buying, Comfort Is Key

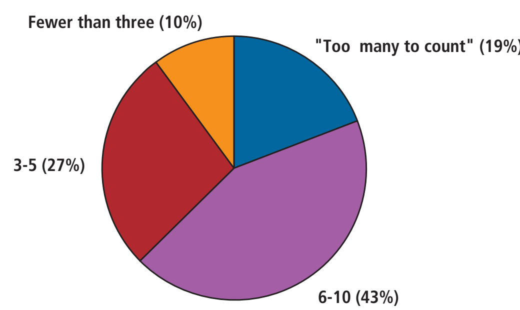
Nine in 10 women own three or more bras, and nearly a fifth own "too many to count," according to lingerie manufacturer Warner's. Despite the plethora of bras in the underwear drawer, 73% have one that they wear more than others.

What makes a bra a woman's favorite? Comfort is the top factor (25%), followed by providing good shape (12%), support (10%), and balancing comfort with style (10%).

More than half of women (54%) have never had a professional bra fitting. Six in 10 shop for intimate apparel online occasionally (62%), but only 6% do so frequently. One in three (32%) never shop for bras online.

Women dislike trying bras on at the store; 64% say they only return bras if they absolutely have to. Reasons women resist trying on bras include lack of time (16%), not knowing their size (16%), and poor dressing room lighting (5%).

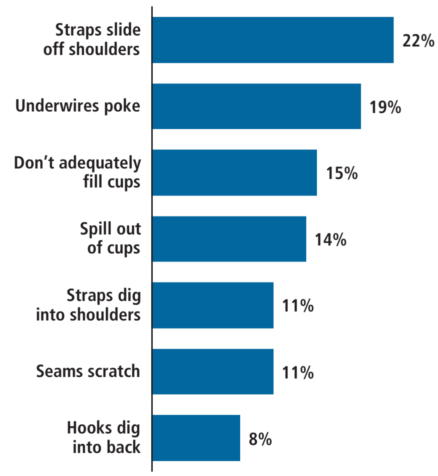
HOW MANY BRAS WOMEN OWN



NOTE: Does not total 100% due to rounding

SOURCE: Warner

WOMEN'S TOP COMPLAINTS ABOUT BRAS



NOTE: Multiple responses allowed.

Source: Warner's

SOURCE: Warner's, Ivory Razor, 470 Wheelers Farms Rd., Milford, CT 06461; 800-423-4313; irazor@warnaco.com; www.warners.com. Price: Contact for information.

Consumers Say They'll Keep Using Coupons After Economy Picks Up; Digital Forms Are Gaining Popularity

Nearly eight in 10 U.S. consumers (78%) used coupons regularly in 2010, and a third (33%) say they used more of them in 2010 than in the previous year, according to NCH Marketing. The total number of coupons distributed by marketers of packaged goods grew 7% between 2009 and 2010 to 332 billion.

Redemption of coupons increased 3% during this time; consumers used a total of 3.3 billion coupons to purchase packaged goods in 2010, saving a total of $3.7 billion in the process. Redemption of grocery coupons increased 10% to 2.2 billion coupons during that time.

While consumers are using more coupons for groceries, their use of coupons for health and beauty products declined 8% between 2009 and 2010 to 1.1 billion coupons redeemed, though it's still higher than the pre-recession figure of 0.9 billion in 2006.

Nearly nine in 10 consumers (89%) say they incorporate coupons when making their shopping lists, compared to 78% who used them to plan their lists in 2007. Among consumers who have felt the need to use more coupons due to their financial situation, the majority plan to continue using them.

While consumers still want (and need to) save money by using coupons, they don't want to spend a lot of time with the scissors to do so. Easier-to-use methods such as digital, instant, and shelf coupons are gaining in popularity.

Digital coupons are the fastest growing coupon format; distribution increased 37% between 2009 and 2010. Redemption of Internet coupons grew 81%, instant redeemable coupons grew 44%, and shelf pad coupons grew 21% between 2009 and 2010, according to Inmar. At the same time, redemption of free-standing insert coupons dropped 11%.

Digital coupon users are more affluent and highly educated than either members of the general population or users of traditional coupons, according to a separate report by Coupons.com. The average annual household income among those who print out digital coupons is $105,000, 26% higher than the national average. More than a third (36%) have college degrees, compared to 28% of users of newspaper coupons and 26% of the general population.

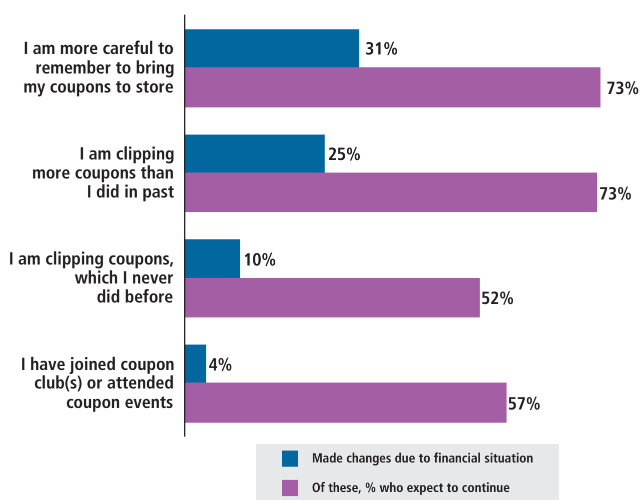
More than seven in 10 U.S. shoppers (73%) have used printable Internet coupons, according to Catapult/Ipsos OTX data cited by Coupons.com. Among those who use online coupons, 30% haven't looked at a Sunday newspaper in the past six months.

Although digital coupon use is growing faster than use of traditional coupon formats, print coupons remain the most widely used form, according to Experian/Simmons.

Over two thirds of U.S. adults (68%) use print coupons, compared with 22% who use digital coupons (as of February 2011). Interestingly, while owners of iPhones are more likely than others to use digital coupons (34% of iPhone owners vs. 21% of non-owners), they're more likely to use printed than digital ones.

Coupon use increases with education; 78% of those with college degrees plan to use coupons to save on rising grocery costs, compared with 51% of those with less than high

CHANGES IN USE OF COUPONS DUE TO PERSONAL FINANCIAL SITUATION



SOURCE: NCH Marketing

TOP 10 PRODUCT CATEGORIES FOR COUPON USE, FEBRUARY 2011

Ready-to-eat cereal
Yogurt
Refrigerated dough
Portable snacks
Vegetables
Baby products
Soup
Air, rug, and fabric care
Cheese
Lunchmeats

SOURCE: Coupons.com

TOP 10 PRODUCT CATEGORIES FOR MOBILE APP COUPON USE, FEBRUARY 2011

Ready-to-eat Cereal
Yogurt
Refrigerated dough
Portable snacks
Vegetables
Air, rug, and fabric care
Baby products
Dinner: multi-serve
Lunchmeats
Nutritional snacks

SOURCE: Coupons.com

school diplomas, according to a Harris Interactive study for Coupons.com.

Women (78%) are more likely than men (66%) to cite coupons as a money-saving strategy; they're also more likely to use tactics such as comparing unit prices (75% vs. 67%) and stocking up on goods when they're on sale (68% vs. 60%).

Almost three quarters of U.S. adults (74%) say they expect coupons and special offers to be much more important in their purchase decisions in the near future, according to The NPD Group.

When asked what they expect to do more often in six months than they currently do, 31% say they'll be using coupons from newspapers or magazines to purchase food and beverages, and 24% say they'll be searching for manufacturers' coupons online.

SOURCES: "Annual Coupon Facts, 2011" NCH Marketing, Analytical Services Team, 155 Pfingsten Rd., #200, Deerfield IL 60015; 847-317-5500; nchanalyticalservices@nchmarketing.com; www.nchmarketing.com. Price: This study is available online with registration.

"2010 Coupon Facts (Updated January 2011)," Inmar, Matthew Tilley, Director, Interactive Communication, 2601 Pilgrim Ct., Winston-Salem, NC 27106; 336-631-2500; solutions@inmar.com; www.inmar.com. Price: Contact for information.

"Digital Coupons Trends Report 2010," Coupons.com, Shachar Torem, VP of Sales, 400 Logue Ave., Mountain View, CA 94043; 650-605-4600; also, Patrick Crisp, patrick@coupons.com; www.coupons.com. Price: Contact for information.

"Print Coupon Use Strong Despite Increase in Digital Coupons," March 31, 2011, Experian Simmons, John Fetto, Senior Marketing Manager, 475 Anton Blvd., Costa Mesa, CA 92626; 714-830-7000; john.fetto@experian.com; www.experian.com. Also, "Experian Simmons 2010 U.S. Household Consumer Trend and Benchmark Report." Price: Selected data are available online with registration.

"The Economy Tracker: March 2011," and "What's Next on the Road to Recovery – June 2010," The NPD Group, Charlie Camarato, 900 West Shore Rd., Port Washington, NY 11050; 516-625-0700; contactnpd@npd.com. Also, Kim McLynn; 847-692-1781; kim.mclynn@npd.com; www.npd.com. Price: Contact for information.

Coupon Users Say They'll Keep Using Them No Matter What

More than nine in 10 shoppers who use coupons (96%) say they'd continue to use them even if they won the lottery, according to coupon and deal site RedPlum.

Three quarters (76%) cite newspapers as their primary source of coupons, while 59% get them from emails or coupon alerts, and 33% get them via Internet searches.

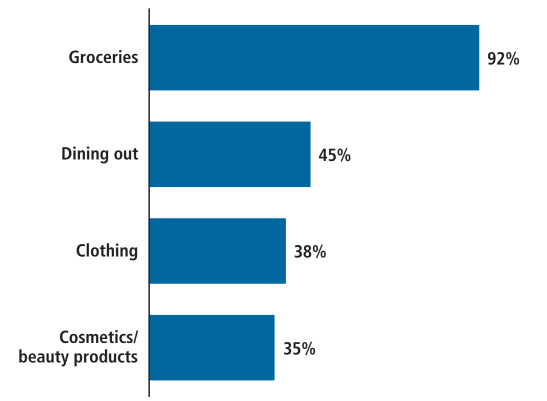
Six in 10 spend up to two hours each week looking for print coupons and deals; 31% spend three or more hours weekly looking for online coupons and deals. One in five (22%) have downloaded coupons to mobile devices, up 107% from 2010. Consumers ages 18-44 with children at home and household incomes of $75,000 or more are the most likely to use mobile coupons.

More than three quarters of coupon users (77%) say they save $11 or more each week using coupons, up from 67% who said so in 2010. Almost a quarter (23%) claim to save $50 or more each week by using coupons.

Among the 56% of teens who use coupons (according to their parents), clothing (25%), entertainment (19%), and beauty/grooming aids (18%) are the top categories for coupon use.

Eight in 10 consumers (81%) say they're using more coupons than they used to, in response to rising costs of food and gas. Seven in 10 (73%) are doing more planning before their shopping trips, and 69% are combining several errands into each shopping trip.

CATEGORIES FOR WHICH CONSUMERS USE COUPONS



SOURCE: RedPlum

SOURCE: "Fourth Annual RedPlum Purse String Study," August 2011, RedPlum (div. of Valassis), Lisa Reynolds, Mom Saver-in-Chief, 19975 Victor Pkwy., Livonia, MI 48152; 734-591-3000; affiliates@redplum.com; www.redplum.com.

Coupon Use Is Becoming A Way Of Life

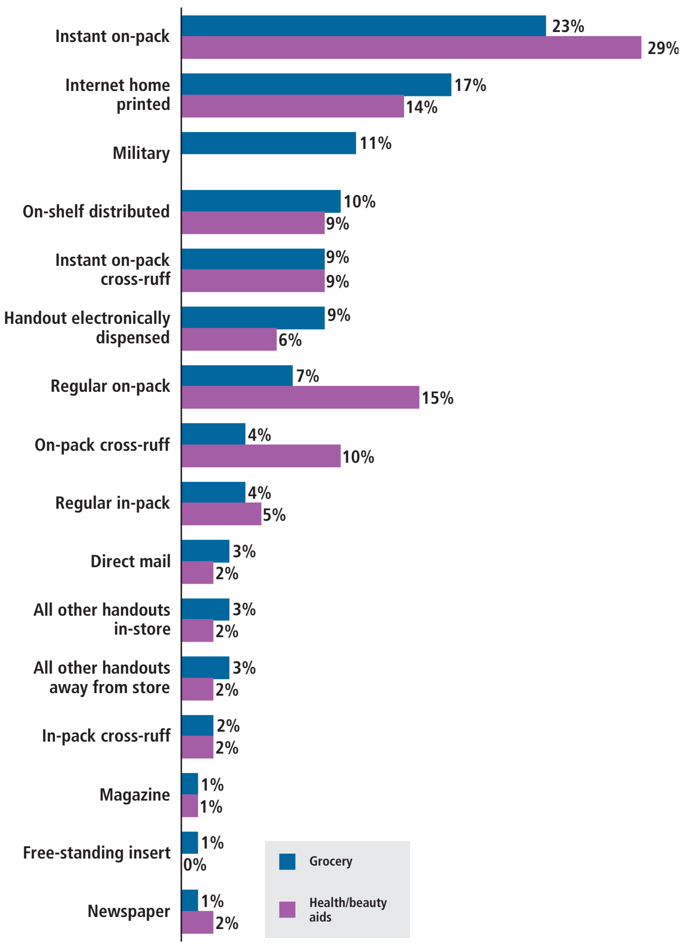
Consumers are continuing to increase their use of coupons, even though manufacturers are making fewer of them available, and are making them more difficult to redeem by shortening their expiration dates and requiring multiple purchases, according to NCH Marketing.

Marketers distributed 167 billion consumer packaged goods (CPG) coupons during the first half of 2011, down 6% from the same period in 2010. More than a quarter (27%) of CPG coupons required multiple purchases in the first half of 2011, up from 24% in first-half 2010. Consumers were given an average of 10.1 weeks to redeem each coupon, down from 11.3 weeks in 2010.

Consumers redeemed 1.75 billion coupons in the first half of 2011, up 3% from the previous year. Consumers saved an average of $1.57 per coupon — a total of $2 billion in the first half of the year, 5% more than in the first half of 2010.

The behavior indicates a long-term shift toward a focus on value and careful spending, according to the researchers. The expanding availability of digital coupons — which consumers may consider more convenient to access and use — may also be a factor.

COUPON REDEMPTION RATES, FIRST HALF OF 2011, BY MEDIA TYPE



SOURCE: NCH Marketing Services

SOURCE: "Mid-Year 2011 Coupon Facts Report," July 2011, NCH Marketing Services, Charlie Brown, VP Marketing, 155 Pfingsten Rd., Deerfield, IL 60015; 847-317-5500; NCHanalyticalservices@nchmarketing.com; www.nch-marketing.com.

Frequent Coupon Users Spend More Online

Frequent users of online coupons (those who use them more than six times a year) spend an average of $1,850 online per year, compared to $1,025 spent by light users, according to Forrester Consulting for WhaleShark Media.

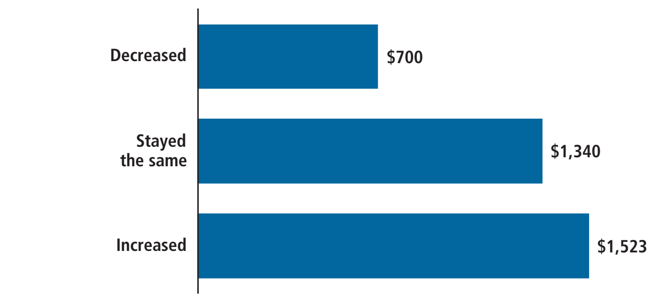
Those who increased their use of online coupons or promotion codes in the past year spent more on online purchases than those whose use of coupons and codes has declined or stayed the same.

Frequent users of online coupons are more open to trying new brands or switching brands than lighter users. The majority of online coupon users (60%) say they'd be likely to reconsider buying a product they'd placed in their shopping cart but had decided not to purchase if they received an online coupon or promotion code for it.

Eight in 10 coupon users (80%) think offering online coupons or promotion codes improves a company's image.

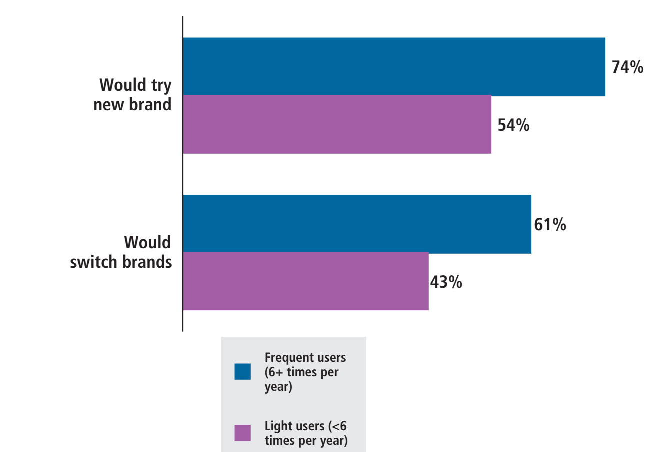
Shoppers who visit coupon websites are more likely than online shoppers overall to say online coupons or promotion codes often close the deal for them when they're undecided about a potential purchase (88% vs. 78%). Coupon website visitors have made an average of 13 online purchases the past six months, compared to 11 made by overall users of online coupons.

AMOUNT COUPON USERS SPENT ONLINE IN PAST YEAR: SHOPPERS WHO INCREASED VS. DECREASED ONLINE COUPON USE IN PAST YEAR



SOURCE: Forrester Consulting for WhaleShark Media

ACTIONS SHOPPERS WOULD TAKE IF THEY RECEIVED ONLINE COUPON OR PROMOTION CODE, FREQUENT COUPON USERS VS. LIGHT USERS



SOURCE: Forrester Consulting for WhaleShark Media

SOURCE: "The Impact of Online Coupons and Promotion Codes," September 2011, Forrester Consulting for WhaleShark Media. Forrester Consulting, 400 Technology Sq., Cambridge, MA 02139; 617-613-6000; msconsulting@forrester.com; www.forrester.com.

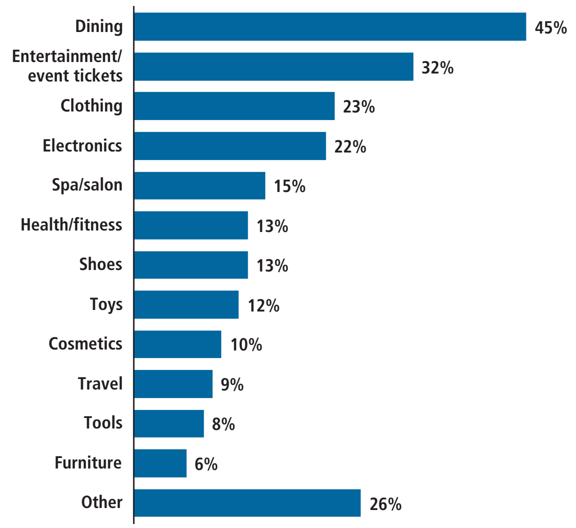
WhaleShark Media, Jill Balis, SVP Marketing, 301 Congress Ave., #700, Austin, TX 78701; 512-777-2970; www.whalesharkmedia.com. Price: Available online at no charge.

Daily Deal Buyers Come Back For More

Almost two thirds of shoppers (65%) who buy special one-day offers through sites such as Groupon and LivingSocial return to the businesses to make further purchases, according to Lightspeed Research. A quarter of consumers have purchased daily deals, and of these 69% have bought more than one in the past year. Six in 10 say the special offer influenced them to make a purchase they weren't sure about.

Six in 10 (60%) make additional purchases while they're redeeming their daily deals. Men (65%) are more likely than women (57%) to make additional purchases when they're visiting the business to redeem their deal. Four in 10 purchasers of daily deals also make purchases at nearby businesses when they're redeeming their offers.

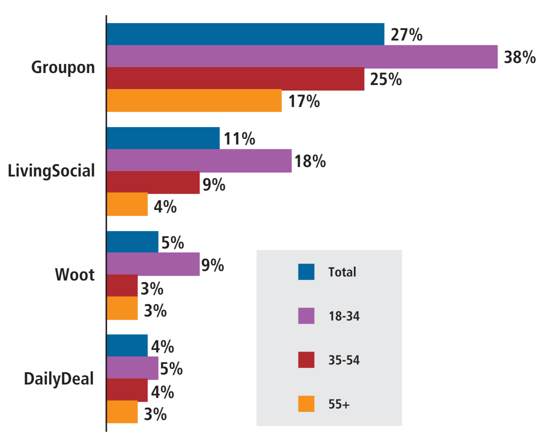
TYPES OF DAILY DEALS CONSUMERS HAVE BOUGHT



NOTE: Base is consumers who have ever purchased a daily deal.

SOURCE: Lightspeed Research

TOP DAILY DEAL SITES AMONG CONSUMERS, BY AGE
(among consumers who have ever bought from site)



SOURCE: Lightspeed Research

More than a third (35%) are willing to travel 20 miles or further to use a daily deal, though 23% have bought a deal and let it lapse without redeeming it.

Most consumers buy daily deals online via computer (94%), as opposed to via mobile. Men (8%) are more likely than women (4%) to buy daily deals via mobile web or app.

SOURCE: Lightspeed Research, April 2011, Naor Chazan, Marketing Director, Americas, 3 Mountain View Rd., 3rd Fl., Warren, NJ 07059; 908-605-4480; nchazan@lightspeedresearch.com; www.lightspeedresearch.com

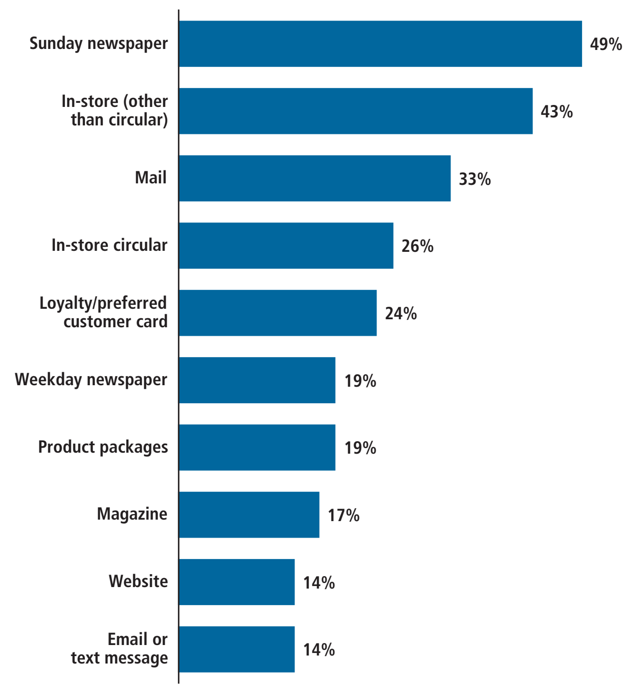
Newspaper Is Still Chief Source Of Coupons

Adults who use coupons for grocery shopping are most likely to get them from the Sunday paper and in-store, according to Scarborough Research. Coupon usage has grown 24% since 2006, and almost a quarter (22%) use some kind of digital coupon, including email, text, and Internet.

Digital Deal Seekers — defined as those whose households regularly get coupons online, via email, or in text messages — are more likely than adults overall to patronize local businesses such as restaurants, day spas, stores, and florists. They make up a third of households that spend $200 or more on groceries each week. More than nine in 10 (91%) have shopped at department stores in the past month.

They're more likely than consumers overall to have patronized fine jewelry stores (44% more likely), florists (30% more likely), and dry cleaners (37% more likely) in the past

WHERE U.S. CONSUMERS GET THEIR GROCERY/HOUSEHOLD COUPONS



NOTE: Multiple responses allowed

SOURCE: Scarborough Research

three months. They're 47% more likely than adults overall to practice yoga, 32% more likely to go to a gym, 31% more likely to enjoy swimming, and 27% more likely to go running.

Nearly half of Digital Deal Seekers (48%) have eaten at Chinese restaurants in the past month; 40% have eaten at Mexican restaurants, and 29% at Italian restaurants.

SOURCE: Scarborough Research, USA+ Study, Allyson Mongrain, Director, Marketing & Communications, 770 Broadway, New York, NY 10003; 703-451-3174; amongrain@scarborough.com; www.scarboroughresearch.com. Price: Contact for information.

Shopping Habits Vary By Race

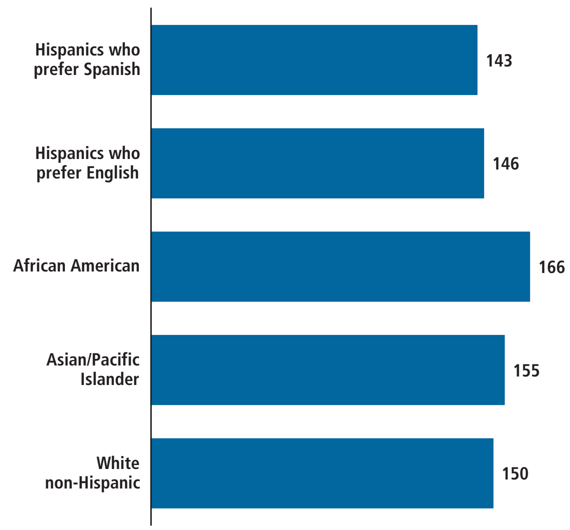
African Americans spend less per shopping trip than members of other races/ethnicities, but they shop more frequently, according to Nielsen. Their shopping trips focus on small retailers such as drugstores, convenience/gas station stores, and dollar stores over grocery stores and supercenters. Black shoppers spend more than the average U.S. consumer on basic food ingredients, non-alcoholic beverages, and personal care products.

Hispanics shop less frequently than members of other racial/ethnic groups, but they spend more per trip. Retail preferences vary by language; those who prefer English patronize supercenters, mass merchants, and drugstores most often, while those who prefer Spanish frequent dollar stores, convenience/gas stations, and warehouse clubs.

Hispanics outspend average U.S. households on personal care items; baby products; and food staples such as grains, oil, flour, and spices.

Asian/Pacific Islanders spend less per trip than Hispanics but shop more frequently. They outspend all other groups on fresh produce, nuts, pasta, soup, yogurt, and juice. In-store specials are important to this group; they buy nearly a third of their items on sale.

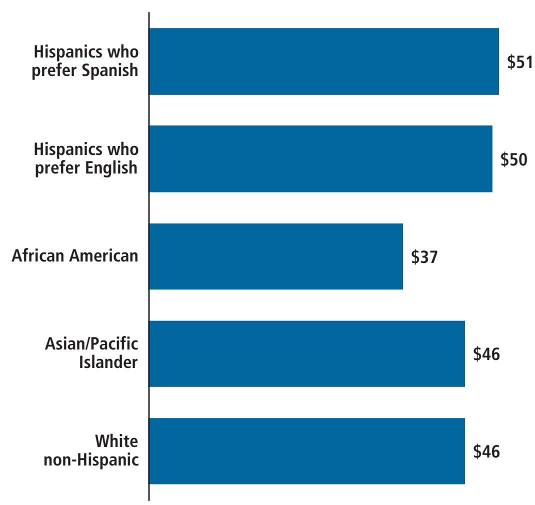
TOTAL SHOPPING TRIPS MADE BY U.S. HOUSEHOLDS IN 2010, BY RACE/ETHNICITY



NOTE: Excluding trips to buy only gas or prescription drugs.

SOURCE: Nielsen Homescan

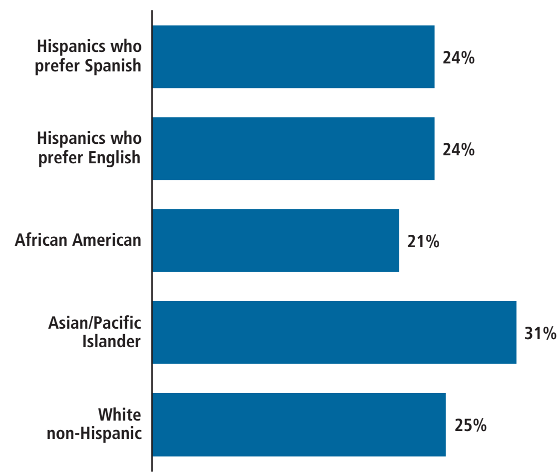
AVERAGE SPENDING PER SHOPPING TRIP IN 2010, BY RACE/ETHNICITY



NOTE: Excluding trips to buy only gas or prescription drugs.

SOURCE: Nielsen Homescan

PROPORTION OF TOTAL PURCHASES BOUGHT ON SPECIAL DEAL IN 2010, BY RACE/ETHNICITY



SOURCE: Nielsen Homescan

SOURCE: Homescan, annual data for period ending 12/25/2010, cited in "Dissecting Diversity: Understanding the Ethnic Consumer," Nielsen, Todd Hale, SVP Consumer & Shopper Insights, 770 Broadway, New York, NY 10003; 646-654-5000; todd.hale@nielsen.com; www.nielsen.com. Price: Selected data are available online.

Online, Mobile, And Social Tech Tools Are Making Shopping A More Proactive, Interactive Process

Online tools such as mobile web, digital coupons, and social networks have made shopping a more active process, and one in which consumers can exercise greater control over what they buy and how much they pay, according to Yahoo.

More than half of shoppers (55%) say the Internet has made them less impulsive in their shopping habits. Almost seven in 10 (69%) trust the Internet as a source of product information, compared to 43% who trust magazines, and 35% who trust television.

Price comparison sites and online or mobile coupons have helped make finding a good deal something to brag about. More than eight in 10 shoppers (82%) say finding a great deal on a product feels like winning, and 60% say it's specifically getting a better price than other shoppers that makes them feel like a winner.

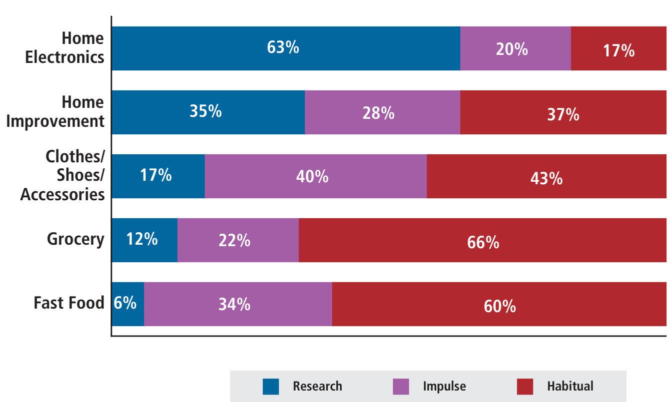
On the other hand, about half (49%) of shoppers give advice to others because they feel a sense of solidarity in their quest to get the best deal. Almost seven in 10 shoppers (69%) seek out more deals and coupons online than they used to, and 49% say they use more coupons these days because of the Internet.

The study classifies the increasing array of online shopping tools into three primary functions: discovery, evaluation, and socializing. Tools for information-gathering and discovery are the most widely used throughout the shopping process, including after the purchase is made.

Shoppers Expect Seamless Transitions

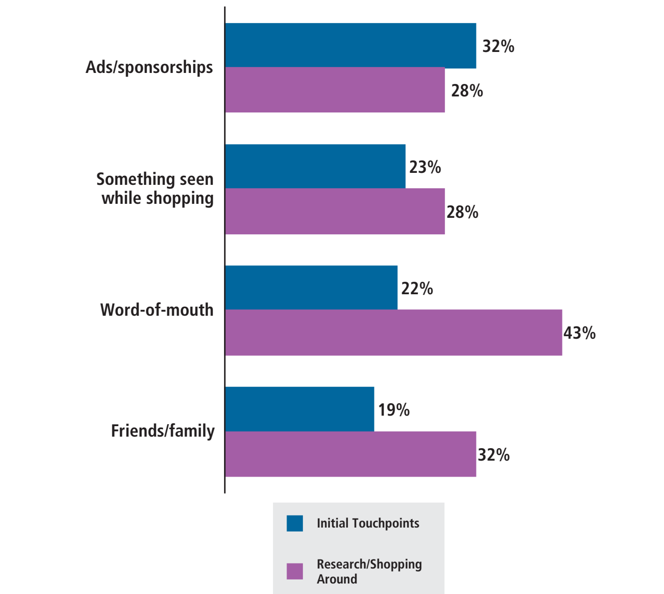
Owners of smartphones have higher expectations of retailers than other shoppers but are also more open to giving out personal information in exchange for a customized shopping experience, according to Demandware.

WHAT MOTIVATES SHOPPING TRIPS, BY SELECTED PRODUCT CATEGORIES



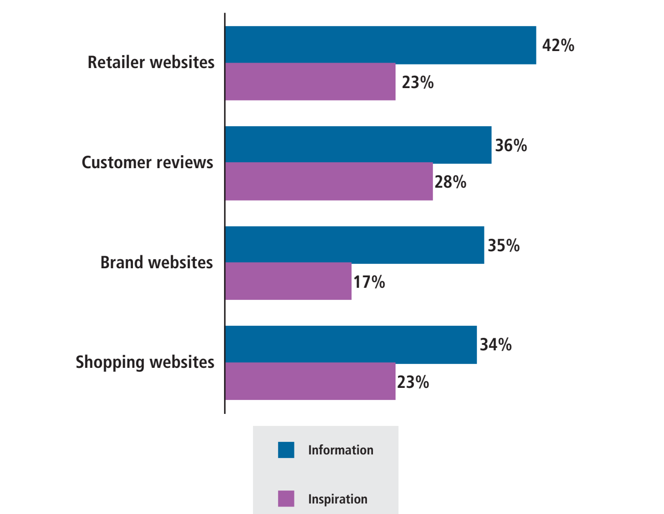
SOURCES: Microsoft, Carat N.A., Essential Research

INFLUENCES ON HOME ELECTRONICS PURCHASES, BY PHASE OF SHOPPING PROCESS



SOURCES: Microsoft, Carat N.A., Essential Research

BEST SOURCES OF ONLINE INFORMATION AND INSPIRATION FOR HOME ELECTRONICS PURCHASES



SOURCES: Microsoft, Carat N.A., Essential Research

Smartphones are contributing to a shopping landscape that is increasingly cross-platform, and smartphone owners expect retailers to provide seamless transitions among in-store, website, and mobile shopping channels.

Good online shopping experiences lead to positive word-of-mouth, but bad experiences lead to even more widespread word-of-mouth: 34% of smartphone owners post online reviews of good experiences, while 43% post reviews of bad experiences.

Four in 10 smartphone owners (45%) say that after a positive online shopping experience, they're more likely to shop in that company's physical stores as well. On the flip side, 51% of shoppers are less likely to make offline purchases from a company with whom they've had a negative online shopping experience.

Two thirds (67%) will tell friends, family, and/or coworkers about good online shopping experiences; 72% will tell them about bad experiences.

Research Is Constant

Instead of a linear path, shopping has become a dynamic process — one in which word-of-mouth and research play constant, integral roles, according to a global study by Microsoft, Carat N.A., and Essential Research (data presented here is U.S.-only). Consumers can continue to research and compare prices while they're in-store; they can send photos of items they're considering to friends to help them decide, and they can post opinions about shopping experiences from the checkout line.

Shopping missions can be characterized by core motivations: impulse purchases, habitual purchases, and well-researched purchases. Motivations vary significantly by category: home electronics purchases tend to be well-researched, whereas groceries are largely habitual buys. Clothing/accessories are about equally likely to be habitual or impulse purchases.

Consumers consider the Internet the most valuable source of research for all product categories except groceries (for which discount coupons are considered most important).

Each shopping "journey" has several touchpoints during which the consumer may be influenced by media, advertising and marketing, recommendations from friends, customer or editorial reviews, special offers, etc. Online, mobile, and social networking technologies have made the shopping process more complex, but they've also increased the number of touchpoints and spread them throughout the process — including at the point of purchase and after purchase (to influence future purchases and those of other shoppers).

A variety of influences can trigger awareness that a product is needed, such as seeing items while shopping for something else, hearing about products through word-of-mouth, viewing ads, or reading about products in articles or on blogs. Many of the same influences are also used in the research and information-gathering phase, and even checked in with during final decision-making.

Some elements of shopping are predetermined and less subject to influence by marketing or recommendations. For example, when shopping for home electronics, 72% of U.S. consumers have a set budget, while 45% have already decided which brand they plan to buy.

Consumers rate various online resources differently depending on what they're looking for — in some cases they're gathering data; in others they're looking for ideas/inspiration.

After they've made a purchase, 36% of home electronics buyers discuss their choices with friends and family, and 13% talk about the retail experience itself.

SOURCES: "The Long and Winding Road: Gamesmanship of Shopping," Yahoo Insights, Edwin Wong, Director, B2B Strategic Research and Insights, 701 First Ave., Sunnyvale, CA 94089; 408-349-3300; marketingsolutions@yahoo-inc.com; www. advertising.yahoo.com. Price: Selected data available online.

"Understanding the Power of the 'Smart Consumer,'" Demandware, Jamus Driscoll, VP Marketing, 5 Wall St., Burlington, MA 01803; 781-756-3700; info@demandware.com; www.demandware.com. Price: Selected data available online.

"New Shopper Journeys: The Influence of Digital Touchpoints," Microsoft, Carat N.A., and Essential Research. Microsoft, Beth Uyenco Shatto, Global Research Director, Microsoft, 200 E. Randolph Dr., #200, Chicago, IL 60601; 312-920-5600; bethu@microsoft.com; www.microsoft.com

Web And Mobile Shopping Tools Have Made Research An Integral Part Of The Buying Process

Research has become an integral part of the shopping process, thanks in no small part to the immediacy and breadth of information available on the Internet. More than four in 10 consumers (43%) always do research before buying, according to AMP Agency.

The desire to research prior to purchase varies considerably by product category; nearly two thirds (64%) always research their consumer electronics purchases, while fewer than a third (31%) always research before buying health and beauty aids.

Men are more likely than women to do online product research (including reading reviews) before buying computers and cars; women are more likely to research their clothing and book purchases online, says Lightspeed Research.

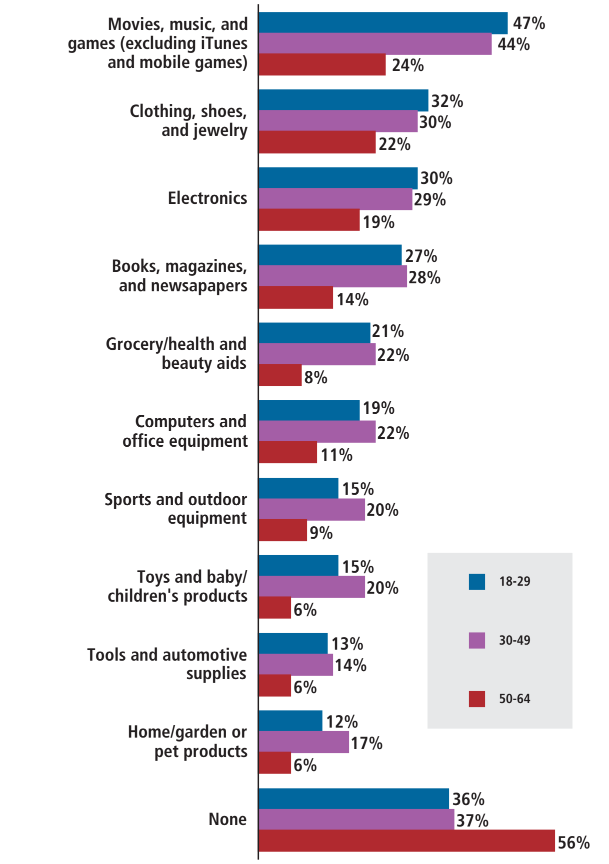
Consumers use a variety of resources for researching products, but online reviews — by both experts and consumers — carry the most weight. Five of the top 10 places consumers look for product reviews are online, according to Lightspeed.

Consumers rate their own prior experience with a brand as the strongest influence on their purchasing decisions, but after that online reviews from both consumers and subject experts rank highest, according to AMP. A significant proportion are swayed by input from their friends as well.

Positive online reviews have a stronger influence than negative reviews, and opinions of friends on social networking sites have less influence than personal conversations with friends and family, according to Lightspeed. Nearly half of consumers (47%) use brand or retailer websites for research, according to AMP.

When people go online looking for reviews, they're most interested in finding general reviews written by other consumers (72%) and cost comparisons (60%), followed by reviews of product features such as durability (42%) and functionality (42%).

ITEMS BOUGHT VIA MOBILE PHONE IN PAST SIX MONTHS, BY AGE

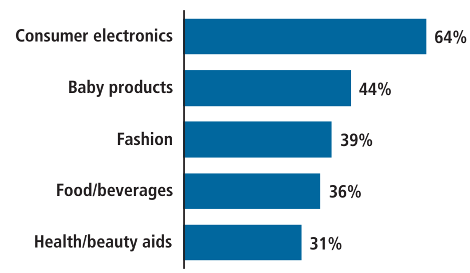


SOURCE: Adobe Systems

WHERE CONSUMERS LOOK FOR PRODUCT REVIEWS

SOURCE: Lightspeed Research

CONSUMERS WHO SAY THEY ALWAYS DO RESEARCH BEFORE BUYING PRODUCTS IN SPECIFIC CATEGORIES

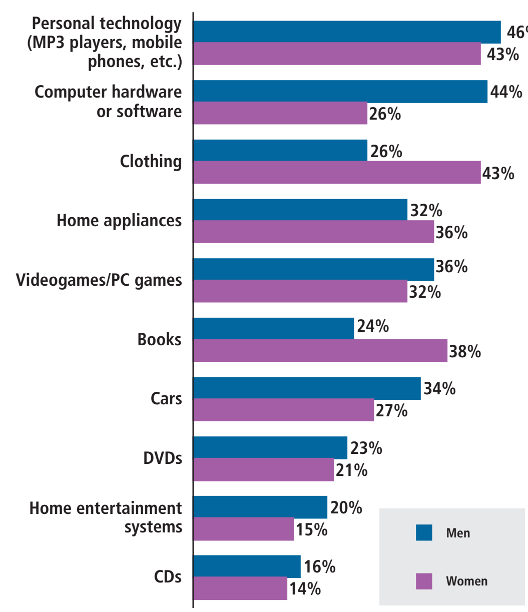


SOURCE: AMP Agency

TOP INFLUENCES ON CONSUMER BUYING DECISIONS

SOURCE: AMP Agency

PRODUCTS MEN AND WOMEN HAVE RESEARCHED ONLINE

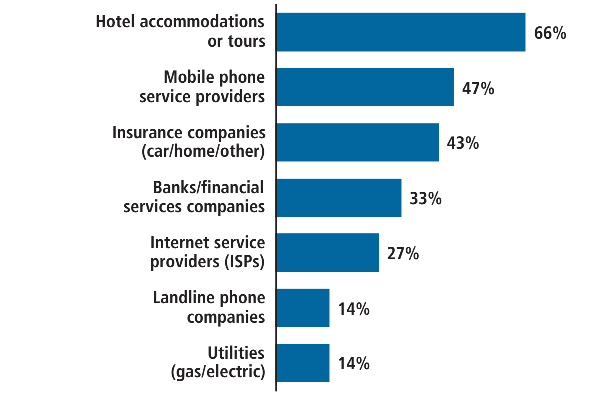


SOURCE: Lightspeed Research

Consumers use online resources to help them choose services as well as products; two thirds have researched tours or hotels online, and more than a third have researched financial services companies, insurance providers, and mobile phone service providers, Lightspeed reports.

More than six in 10 shoppers (62%) would be dissuaded from buying a product or service after reading 1-3 negative reviews. Younger consumers are more likely to give prod-

SERVICES CONSUMERS HAVE RESEARCHED ONLINE



SOURCE: Lightspeed Research

ucts/services a chance; 34% of 18-34-year-olds wouldn't change their minds about buying until they'd read five or more bad reviews, compared to 27% of 35-54-year-olds and 18% of those age 55+.

Easy access to product information and opinions from both consumers and experts is changing the way people shop. Product research and checking reviews has become part of the shopping process, and it's creating a decline in spontaneous purchasing, according to AMP.

While consumers are receptive to getting product information on retailers' and brands' own websites as well as from independent reviewers and category-specific sites, their research window is limited. The majority (60%) make a buying decision within a few days of beginning their research — 24% the same day.

SOURCES: "Inside the Buy: 2011 AMPlified Study," AMP Agency, Allison Marsh, VP Consumer Insights, 77 N. Washington, St., Boston, MA 02114; amplified@ampagency.com; www.ampagency.com. Price: Summary available online; custom reports and additional data available. Contact for pricing information.

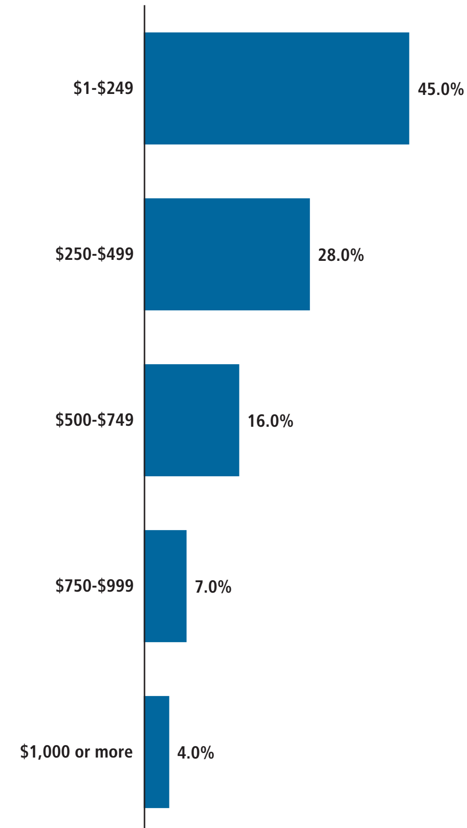
"Consumer Reviews and Research Online, March 2011," Lightspeed Research, Naor Chazan, Marketing Director, Americas, 3 Mountain View Rd., 3rd Fl., Warren, NJ 07059; 908-605-4480; nchazan@lightspeedresearch.com; www.lightspeedresearch.com. Price: Available online at no charge.

Shoppers Are Using Mobile Phones To Compare Prices, Find Information, And Make Purchases

Shopping through mobile phones is still an emerging retail channel, but it's growing quickly. Three in 10 owners of smartphones (30%) have used the devices to make purchases in the past year, according to Deloitte.

A separate study by Abode finds a much higher proportion (62%), but this is due to a survey sample that skews younger than the overall population and includes above-average ownership of smartphones. Although samples in several of the studies presented here are not representative of the general population, the results provide insights into

HOW MUCH CONSUMERS SPENT ON PURCHASES THROUGH THEIR MOBILE PHONES IN PAST YEAR*



* Excluding sales of digital goods.

SOURCE: Adobe Systems

the behaviors and attitudes of early adopters of mobile shopping.

A third (33%) of online shoppers used mobile phones or smartphones to access retailers' websites or mobile apps in 2010, up from 24% in 2009, according to ForeseeResults. Another 26% plan to do so in future.

Among those who have used to their phones to access retail sites or apps, more than half have used them for price comparisons.

How Shoppers Use Mobiles

Owners of smartphones believe the devices make in-store shopping faster (67%) and more enjoyable (61%), according to Accenture. More than half (57%) would shop more frequently at stores optimized for smartphone use.

Smartphone users prefer using their phones over asking store personnel for some types of information, such as finding the closest store that has a specific item in stock (71% prefer smartphone; 17% prefer employee) and being notified when an item comes into the store (73% vs. 15%). For advice on apparel or instructions on how to use home improvement products, more than half prefer the human touch.

Smartphone owners are receptive to coupon offers —

79% find it useful to download coupons to their phones, and 73% like to get instant coupons for items they're passing by in-store.

Mobiles Helped Holiday Shoppers

Mobile devices are often used as research tools while shopping in stores: 69% of mobile shoppers used their phones to visit a retailer's website while in-store during the 2010 holiday season (up from 52% in 2009), and 46% used them to visit competitors' sites (up from 25%).

More than one in 10 (11%) used their phones to make online purchases during the 2010 holiday season, up from 2% in 2009.

An even higher proportion of smartphone shoppers use their phones to make purchases: 26% of those who shopped with a smartphone during the 2010 holiday season used their phones to make purchases, according to BIGresearch.

Gender & Age Differences

Among mobile users with browser-enabled phones, nearly half (48%) have made at least one purchase via their mobiles, finds Lightspeed Research. Men (52%) are more likely than women (47%) to have done so.

More than half of 18-24-year-olds (52%) and 25-34-year-olds (51%) have bought items via their mobile phones, compared to 40% of those ages 45-54 and 38% of those ages 55-84.

Men in the two youngest groups are especially likely to make purchases on their mobiles: 59% of men ages 18-24 and 57% of men ages 25-34 have done so.

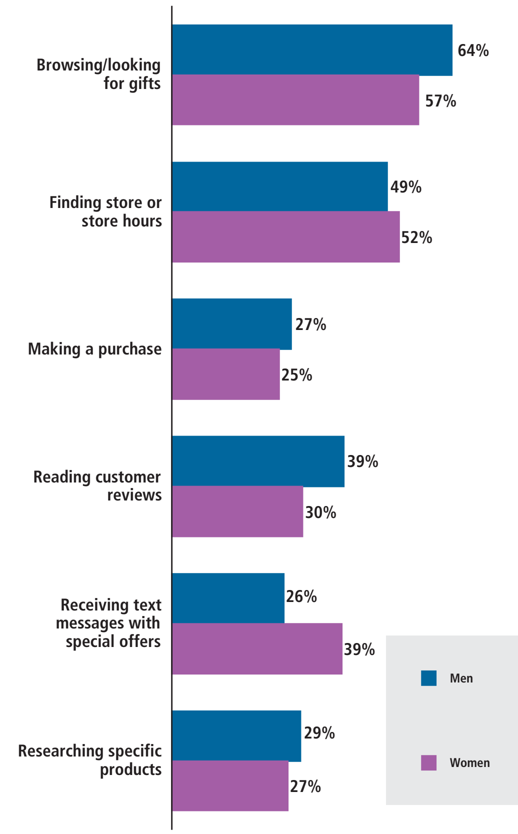
When asked why they haven't used their phones to make purchases, respondents' top reason is preferring to shop on a computer (47%). About one in 10 are concerned about payment security, prefer to shop in a store, or say their connection is too slow.

Mobile shoppers are more likely to make mobile purchases through websites than through apps; men outbuy women in both cases, according to JiWire. Among users of public WiFi hotspots, 28% of men and 18% of women have made purchases through mobile websites, and 21% of men and 14% of women have purchased through mobile apps.

Among consumers who have made purchases with their mobiles in the past year, 61% of men and 44% of women made at least six separate purchases during that time, finds Adobe.

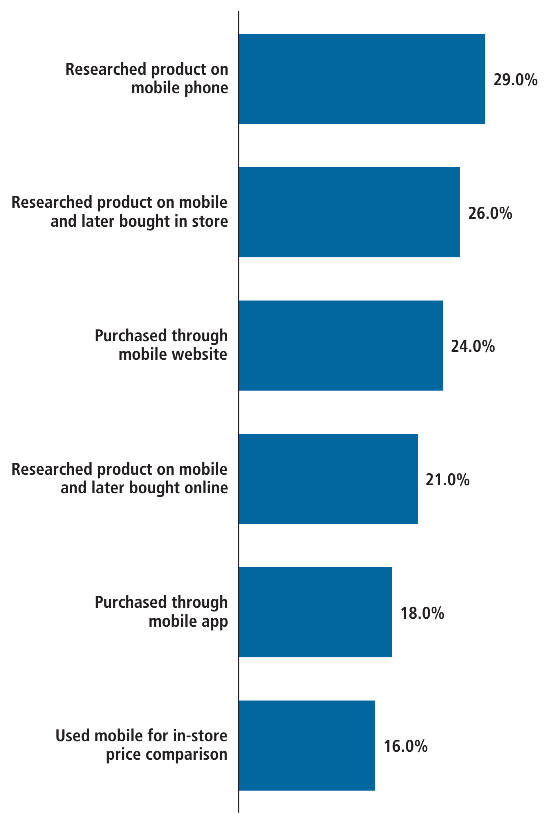
Nearly two thirds (64%) of iPhone owners who use their phones to shop have made at least six purchases in the past year. Men and iPhone users are more likely than women and

HOW MEN AND WOMEN USE THEIR MOBILE PHONES FOR SHOPPING



SOURCE: BIGresearch

HOW WIFI USERS SHOP VIA MOBILE PHONES



NOTE: Study sample is users of public WiFi hotspots.

SOURCE: JiWire

users of other devices to have spent $250 or more shopping from their mobile phones.

What Mobile Shoppers Are Buying

Mobile shoppers are most likely to buy games, apps, music, or ringtones for their phones, according to Lightspeed. Entertainment, prepared meals, and travel are other popular categories. Men are more likely than women to have bought consumer goods via mobile in the past six months, according to Adobe.

More than half (54%) of mobile shoppers prefer to make purchases through retailers' mobile websites, while 41% would rather use mobile apps, according to Lightspeed. Men and adults ages 25-34 are more likely than women and adults of other ages to prefer shopping through apps.

Credit cards are the most popular way to pay for purchases made through mobile phones (48%), followed by PayPal or similar payment systems (32%), and direct billing on a mobile phone bill. Men (52%) are more likely than women (46%) to prefer credit cards, while women (19%) are more likely than men (12%) to prefer direct billing. Consumers ages 55-84 express a marked preference for payment via credit card (61%).

In addition to expanding shoppers' options for making purchases and finding the information they need to make informed buying decisions, mobile shopping is beginning to influence consumers' views of retailers.

Shoppers who are highly satisfied with their mobile shopping experience with a particular retailer are 30% more likely to buy from that retailer online and/or offline and say they're more likely to recommend the company to friends.

SOURCES: "State of the Media Democracy," Deloitte, Phil Asmundson, Vice Chairman and Technology, Media, and Telecommunications Industry Leader, 1633 Broadway, New York, NY 10019; 212-489-1600; tmt@deloitte.com; www.deloitte.com. Price: Contact for information.

"Adobe Mobile Experience Survey," Adobe Systems Inc., Brad Rencher, VP & GM Omniture Business Unit, 345 Park Ave., San Jose, CA 95110; 415-506-6000; s7marketing@adobe.com; www.scene7.com or www.omniture.com. Price: Contact for information.

"ForeSee Results Report on Mobile Shopping, U.S. Edition 2010," ForeSee Results, Kevin Ertell, VP, Retail Strategy, 2500 Green Rd., #400, Ann Arbor, MI 48105; 800-621-2850; kevin.ertell@foreseeresults.com; www.foreseeresults.com. Price: Free download.

"Retailing in an Era of Mobility, July 2010," Accenture, Janet Hoffman, Managing Director, Retail Practice, 161 N. Clark, Chicago, IL 60601; 312-842-5012; janet.hoffman@accenture.com; www.accenture.com/mobileretail. Price: Free download.

"Consumer Intentions & Actions Survey, December 2010," BIGresearch, Phil Rist, EVP Strategic Initiatives, 450 West Wilson Bridge, #370, Worthington OH 43085; 614-846-0146; phil@bigresearch.com; www.bigresearch.com. Price: Contact for information.

"Mobile eCommerce, October 2010," Lightspeed Research, Naor Chazan, Marketing Director Americas, 3 Mountain View Rd., 3rd Fl., Warren, NJ 07059; 908-630-3443; www.lightspeedresearch.com. Price: Contact for information.

"JiWire Mobile Audience Insights Report, Q4 2010," JiWire, 150 Post St., Ste. 500, San Francisco, CA 94108; 415-877-4711; insights@jiwire.com; www.jiwire.com. Price: Free download.

Consumers Say Internet Offers The Best Shopping Experience

Consumers are more likely to be satisfied with the overall shopping experience when shopping online via computer than in any other retail channel, according to The E-tailing Group. When shopping online, consumers consider free shipping and free returns to be the most important factors in getting them to buy from the website.

More than half of consumers (56%) say they do online product research for half or more of all their purchases (in any channel). More than one in 10 (14%) say they research 90% or more of their purchases online prior to buying in any channel.

The amount of research consumers do prior to making a purchase varies with product category; travel and technology purchases are most likely to be planned and researched, while commodities such as health and beauty aids or office supplies are least likely.

Mobile Shopping

Smartphone users are about equally likely to use their phones for shopping research before shopping at bricks-and-mortar retailers and once they're in the store.

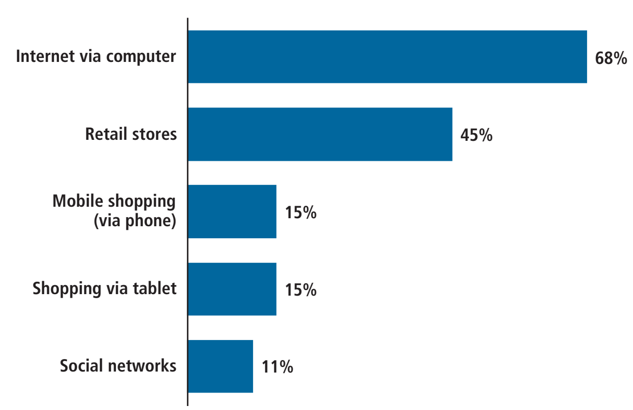
The majority of mobile shoppers expect to spend the same or more via smartphone in the coming year, and half expect to spend the same or more via tablet.

The majority of consumers are willing to interact with brands or retailers in some way online; the most popular formats are permission-based emails, ratings/reviews, and "liking" brands or retailers on social networks.

Social networks are still not a significant channel for purchasing, although their influence on related aspects of shopping — such as reviews and sharing opinions on products and brands — is growing.

Just over one in 10 online consumers (12%) have made a purchase from a social networking site in the past year. Just

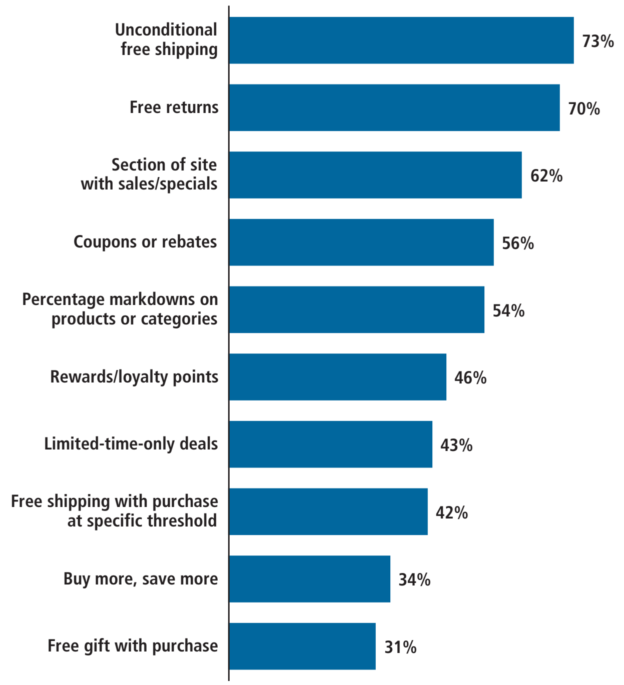
CONSUMER SATISFACTION WITH VARIOUS RETAIL CHANNELS
(% who rate the shopping experience as excellent or very good)



SOURCE: The E-tailing Group

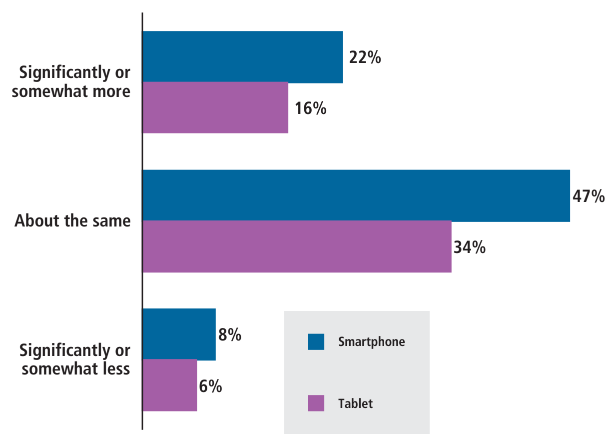
FEATURES THAT CONSUMERS CONSIDER MOST IMPORTANT WHEN BUYING FROM A WEBSITE

(% who rate them as critical or very important)



SOURCE: The E-tailing Group

HOW MUCH MOBILE SHOPPERS EXPECT TO SPEND VIA SMARTPHONE AND TABLET, COMING YEAR VS. PAST YEAR



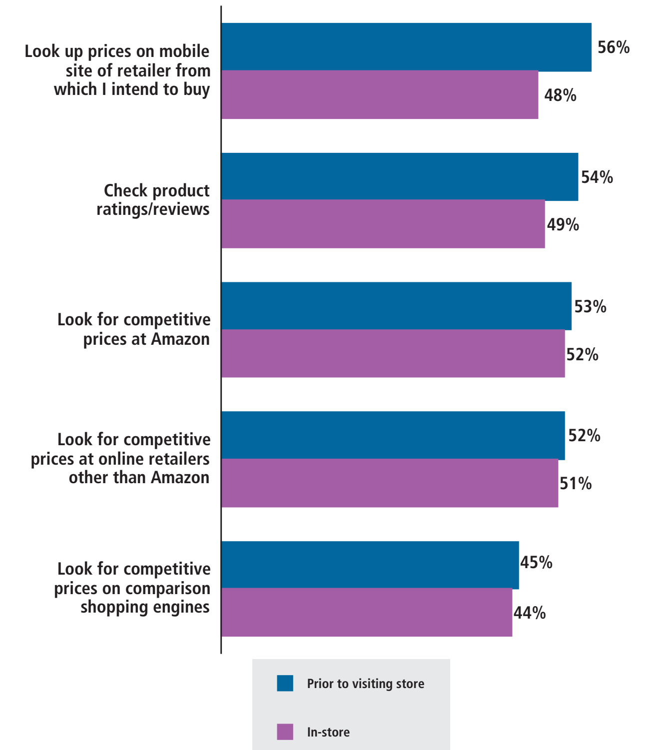
SOURCE: The E-tailing Group

under a fifth (17%) say Facebook is having more influence on their shopping experiences now than it did a few years ago — about on par with the proportion influenced by mobile apps (19%).

In a climate of bargain-hunting, it can be hard for retailers to entice consumers to pay full price.

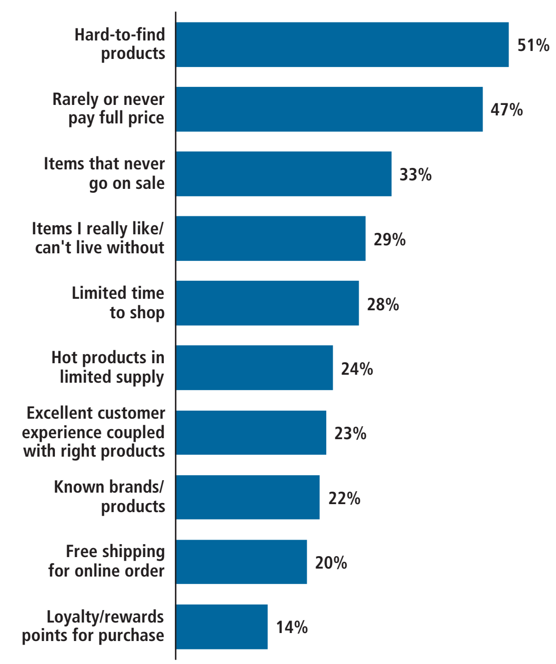
HOW SMARTPHONE OWNERS USE THEIR DEVICES TO SHOP AT RETAIL STORES

(Frequently, often, or sometimes)



SOURCE: The E-tailing Group

WHAT MOTIVATES CONSUMERS TO PAY FULL PRICE



SOURCE: The E-tailing Group

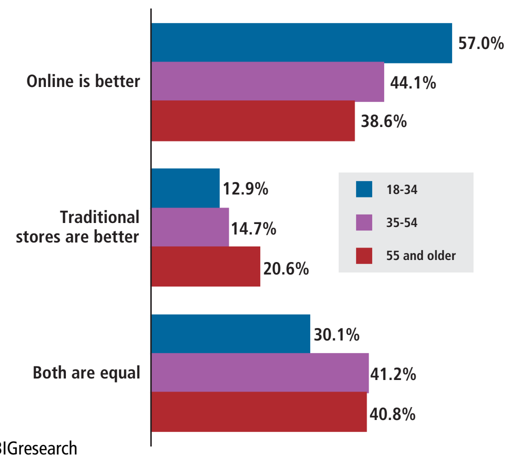
SOURCE: "The Connected Consumer," October 2011, The E-tailing Group, Lauren Freedman, President, 1444 W. Altgeld St., Chicago, IL 60614; 773-975-7280; LF@e-tailing.com; www.e-tailing.com. Price: Available online at no charge.

Online Shoppers Find The Best Assortments And Sales, Not Service

Of Americans who have ever shopped online, 45% are shopping more online compared to the prior year, and 41% are shopping the same amount online, according to BIGresearch. That's compared to 9% who are shopping more in brick-and-mortar stores and 53% who are shopping the same amount in stores.

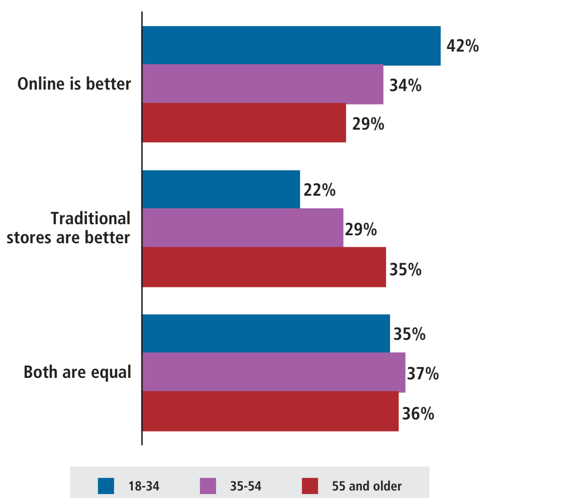
Nearly half of shoppers (46%) say they find the best selection of merchandise at online retailers, whereas only 16% say traditional stores have the best selections. Similarly, shoppers think they get better deals at online retailers (50%) than at traditional stores (14%). They are split on who has the best sales and promotions, with 35% saying online retailers, 29% saying traditional stores, and 36% saying they are equal.

SHOPPERS' PERCEPTIONS OF PRODUCT ASSORTMENTS, ONLINE RETAILERS VS. TRADITIONAL STORES, BY AGE, 2011



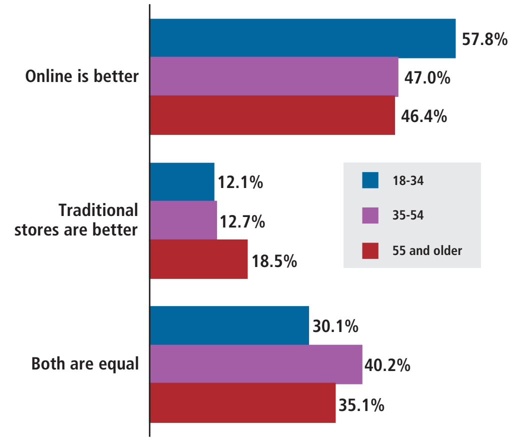
SOURCE: BIGresearch

SHOPPERS' PERCEPTIONS OF SALES AND PROMOTIONS, ONLINE RETAILERS VS. TRADITIONAL STORES, BY AGE, 2011



SOURCE: BIGresearch

SHOPPERS' PERCEPTIONS OF PRICES, ONLINE RETAILERS VS. TRADITIONAL STORES, BY AGE, 2011



SOURCE: BIGresearch

One area in which traditional stores clearly surpass online retailers is customer service, with 50% of shoppers saying that brick-and-mortar stores have the best service, compared to 20% who say online retailers do.

The younger the shopper, the more likely they are to espouse the benefits of online shopping over traditional shopping.

The vast majority of online shoppers (70%) prefer to shop online retailers who also have a physical presence. While that makes a difference in terms of trust, it also affects returns: 62% of shoppers who have returned an online purchase did so in person at a store.

SOURCE: "American Pulse: Online Shoppers," 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.

Online Shoppers Are Deal Oriented, Few 'Follow' Brands

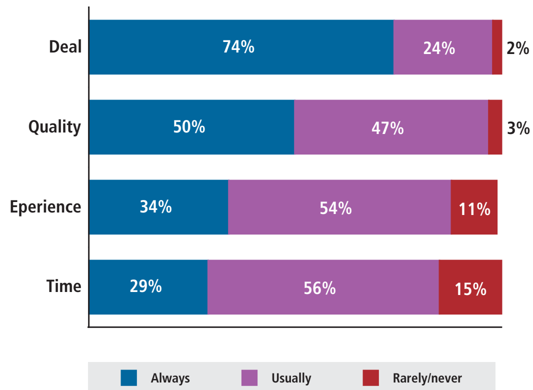
The overwhelming reason consumers choose to shop online is because they are looking for deals, according to M/A/R/C research. Nearly three quarters of online shoppers (74%) say finding a deal is always important when they shop online. Only 29% say time constraints are always important to their online shopping.

Very few consumers overall (6%) follow brands via social media. However, among those who do, the brand categories they are most likely to follow include:

- Entertainment (3.7% follow such brands on social media);

- Apparel (1.9%);
- Food (1.6%);
- Beauty (1.5%);
- Non-alcoholic beverages (1.5%);
- Alcoholic beverages (1.3%);
- Health (1.3%); and
- Household products (1.0%).

FACTORS CONSUMERS SAY ARE IMPORTANT WHEN SHOPPING ONLINE, 2010



SOURCE: M/A/R/C Research

SOURCE: "Digital Report: Shoppers' Adoption of Online Technologies for Both Brand Engagement and Purchase," 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 Vet Recommended Products Online Before Buying

Eight in 10 online consumers (80%) have changed their minds about purchasing a product or service that was recommended to them after they read negative reviews or other information online, according to Cone. Nearly nine in 10 (87%) say their decision to purchase something has been reinforced by positive reviews or information online.

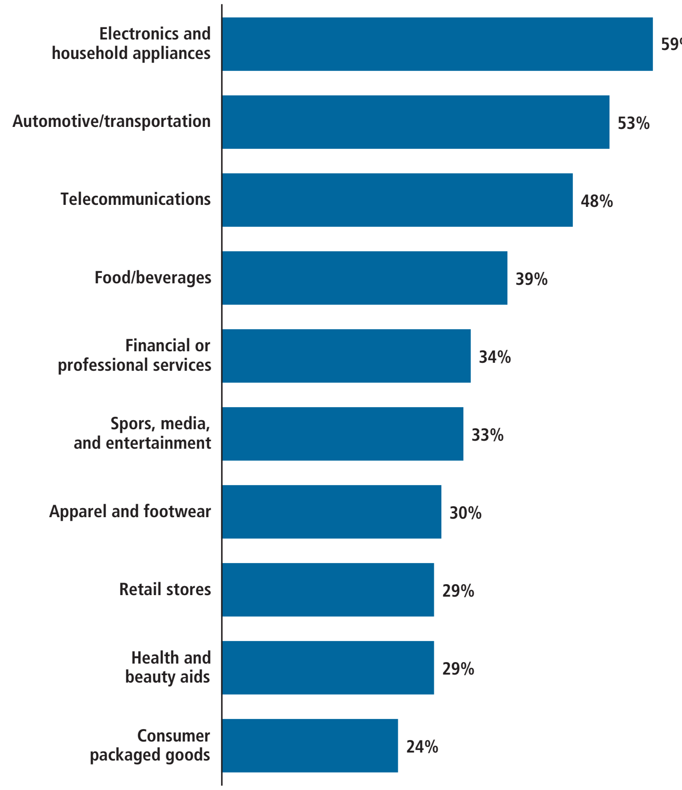
Consumers are most inclined to trust the opinions of people who have used the product or service (69%) and/or those who have expertise with the product category (60%).

When researching products or services they're considering buying, consumers utilize a variety of information sources, including user reviews, ratings, expert opinions, and blog posts.

Consumers are most likely to do additional research online before buying products that have been recommended to them when considering high- or moderate-cost purchases such as cars or computer equipment (89% of each), but more than three quarters say they research smaller-ticket items such as movies or restaurants (78%).

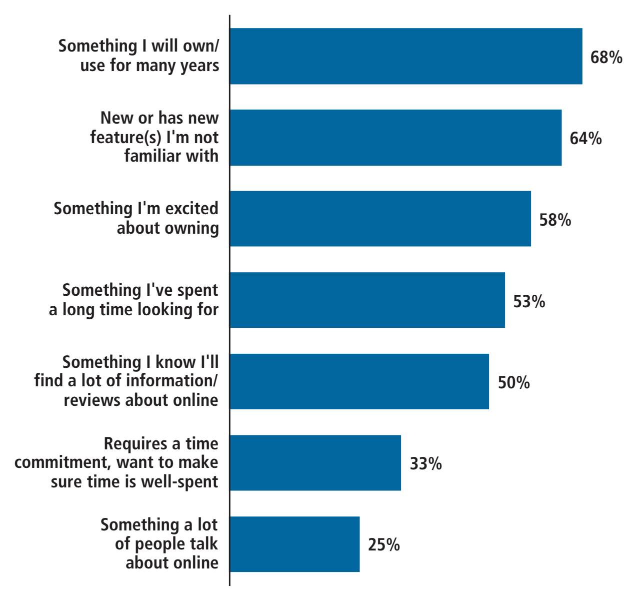
Nearly six in 10 (59%) say having easy access to the Internet via mobile phones has made them more likely to research products and services that have been recommended to them before deciding to buy.

TYPES OF PRODUCTS CONSUMERS ARE MOST LIKELY TO RESEARCH ONLINE BEFORE BUYING



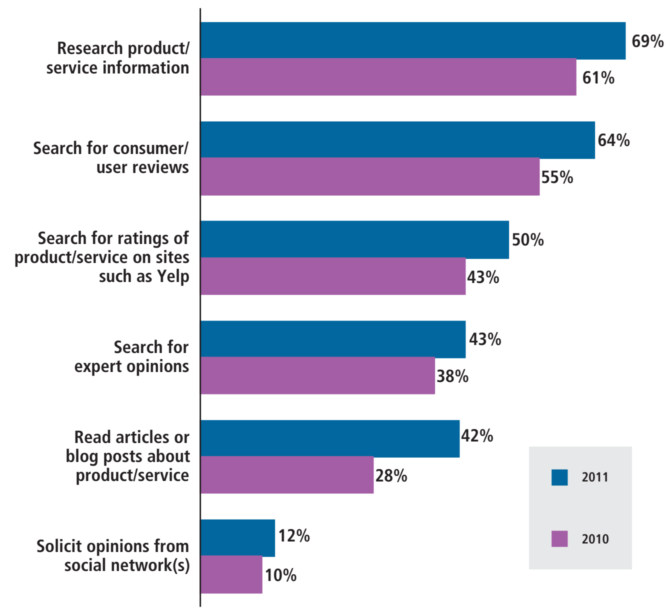
SOURCE: Cone

SITUATIONS IN WHICH CONSUMERS ARE MOST LIKELY TO RESEARCH PRODUCTS BEFORE BUYING



SOURCE: Cone

HOW CONSUMERS RESEARCH PRODUCTS/SERVICES ONLINE BEFORE BUYING, 2011 VS. 2010



SOURCE: Cone

SOURCE: "2011 Cone Online Influence Trend Tracker," Cone, Mike Hollywood, Director of New Media, 855 Boylston St., Boston, MA 02166; 617-227-2111; mhollywood@coneinc.com; www.coneinc.com.

Online Shoppers Looking Less, Buying More

Online shoppers are looking at fewer product pages per shopping session but purchasing more items per order than they were in 2008, according to IBM Coremetrics. The researchers believe this trend toward "surgical shopping" reflects mobile and social media cutting into time that was once spent on retail websites; it's also likely that shoppers' use of mobile for pre-shopping has streamlined the buying process at traditional retail websites.

The average value of an online order placed in April 2011 was $208.58, up 70% from $120 in June 2008. Online shoppers are also buying more items per order: an average of 8.26 products in March 2011, up from 4.8 in December 2008. At the same time, the average time spent on retail websites declined 30% between April 2008 and December 2010.

While still accounting for a small proportion of overall online sales, mobile is growing quickly — 6.5% of all online purchases in April 2011 were made via mobile web, and mobile accounted for 7.6% of all website traffic to online retailers.

Mobile visitors to retail sites view fewer pages on average per visit and spend less time on the sites than overall site visitors. More than six in 10 visitors (63%) to retail sites who arrive from social networks and 45% of mobile visitors look at only one page before leaving, compared to 35% of visitors overall.

PAGE VIEWS AND TIME SPENT ON RETAIL WEBSITES

	ALL VISITORS	MOBILE	SOCIAL*
Pages viewed per session	7.5	4.8	5.2
Average time on site	7:20	3:42	3:26

NOTE: "Social" refers to visitors arriving via a social network.

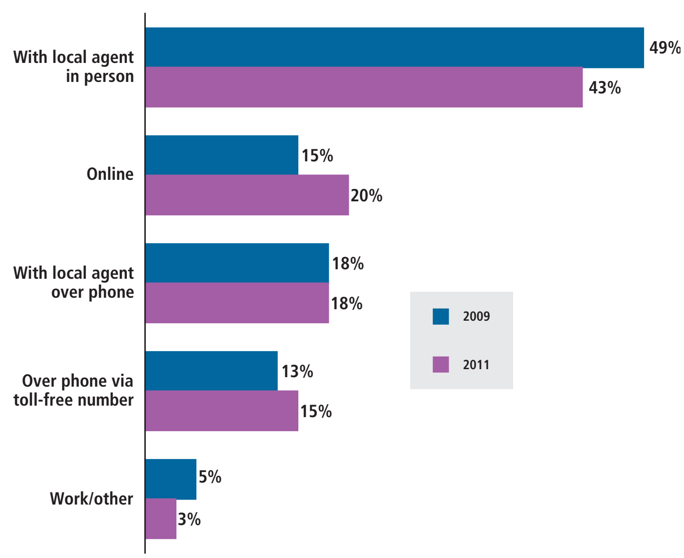
SOURCE: IBM Coremetrics

SOURCE: "IBM Coremetrics 4th Annual Online Retail Holiday Readiness Report," June 2011, Coremetrics (div. of IBM), John Squire, Chief Strategy Officer, 1840 Gateway Dr., San Mateo, CA 94404; 866-493-2673; cminfo@us.ibm.com; coremetrics.com. Price: Available online at no charge.

Online Auto Insurance Growing

The proportion of drivers who bought their auto insurance online grew from 15% to 20% between 2009 and 2011, according to comScore. During the same time frame, those buying through local insurance agents dropped from 49% to 43%.

HOW DRIVERS PURCHASE AUTO INSURANCE, 2009 VS. 2011



SOURCE: comScore

SOURCE: comScore, Carmela Aquino, 11465 Sunset Hills Rd., #200, Reston, VA 20190; 703-438-2024; caquino@comscore.com; www.comscore.com. Price: Contact for information.

Consumers Are Poised To Shop Strategically For Holidays

Concerns over the fluctuating prices of staples such as food and gasoline are driving cutbacks in consumer spending for the 2011 holiday season, according to Deloitte. Only one in 10 consumers plan to spend more in 2011 than they did in 2010. More than four in 10 (44%) have a specific holiday budget in mind.

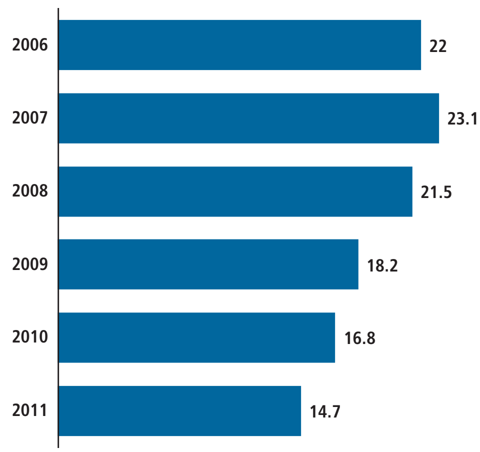
Consumers plan to save money by buying fewer gifts, as well as using tactics such as buying items on sale, comparing prices online, using coupons, and consolidating shopping trips to save on gas.

More than two thirds of consumers (68%) say they're changing how they shop for gifts to save money.

Although gift cards or certificates are the second most popular choice for gifts this holiday season, the number of consumers planning to buy them has declined 11% since 2010. Similarly, the number planning to give money as gifts has declined 7%, suggesting that though consumers plan to spend less money on gifts, they are taking time to choose personal items.

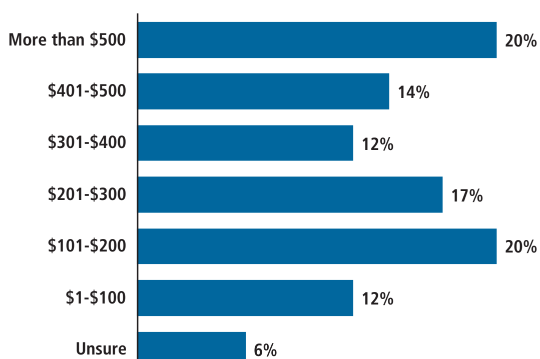
More than a quarter of U.S. shoppers (27%) plan to buy digital goods such as music, movie, or game downloads as gifts, according to Elastic Path Software. Shoppers who plan to buy digital gifts expect to spend about 42% of their total holiday gift budgets on these items. Buyers of digital gifts expect to spend $440 on holiday gifts, compared to an overall average of $349.

AVERAGE NUMBER OF HOLIDAY GIFTS CONSUMERS PLAN(NED) TO BUY, 2006-2011



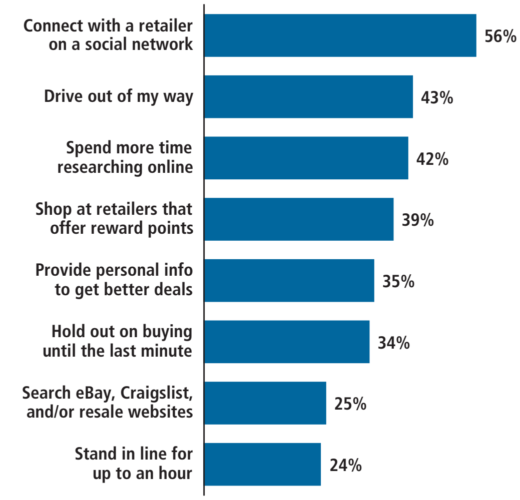
SOURCE: Deloitte

HOW MUCH CONSUMERS EXPECT TO SPEND ON HOLIDAY GIFTS IN 2011



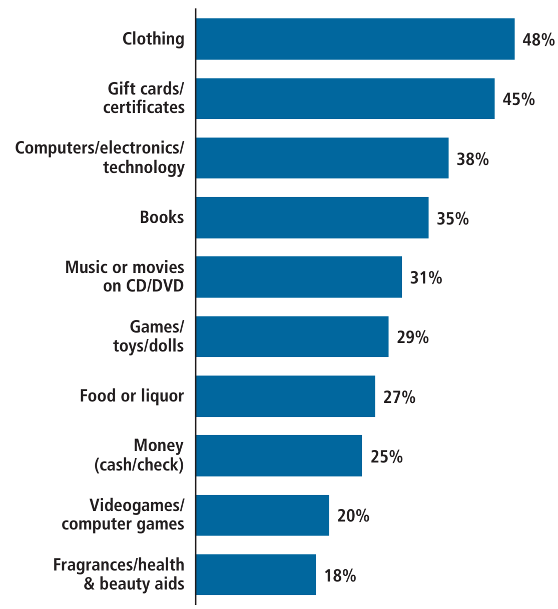
SOURCE: Elastic Path Software

WHAT HOLIDAY SHOPPERS ARE WILLING TO DO TO GET GOOD DEALS



SOURCE: Shopper Sciences

TOP 10 HOLIDAY GIFTS CONSUMERS PLAN TO PURCHASE IN 2011



SOURCE: Deloitte

Consumers with household incomes of $100,000 or more expect to spend an average of $2,142 on holiday gifts, socializing both at home and out, non-gift clothing, and home/holiday furnishings, up from $2,070 in 2010, according to Deloitte. Those with incomes below $100,000 expect to spend an average of $844, down from $962 in 2010.

Cross-Channel Is the New Norm

More than seven in 10 consumers (71%) expect to do at least some cross-channel shopping — most commonly buying in-store after researching online, according to Deloitte. About three in 10 shoppers begin their search for gift ideas in retail stores, according to Elastic Path Software. Consumers ages 18-34 are more likely than those 35 and older to look for gifts through social media sites or search engines.

Internet Is Key To Holiday Research

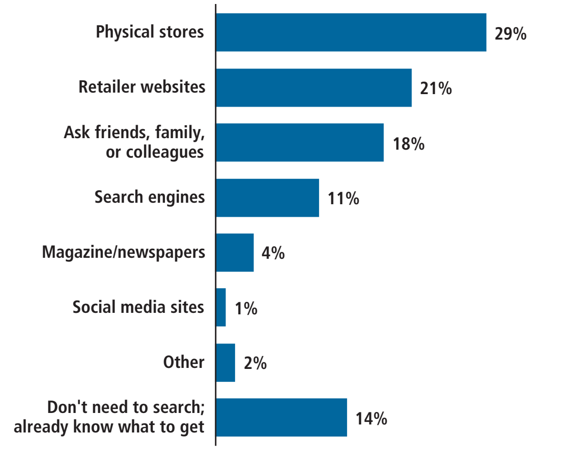
Consumers expect to do a third (33%) of their holiday spending online, but three quarters (75%) will do at least some of their shopping research online, according to Deloitte. Nearly seven in 10 (69%) say they're more likely to buy from online retailers if they offer free shipping.

Of the 44% of consumers who plan to use social media as part of their shopping arsenal, 57% will use it to find discounts, 51% to read reviews, 49% to look for gift ideas, and 46% to find out which gifts their friends or family want.

More than a third (34%) of consumers say they'll buy more of their holiday gifts online in 2011 than they did in 2010, according to Shopper Sciences. Four in 10 shoppers under age 40 (40%) plan to buy more of their gifts online this year, compared to 27% of those age 50 and older.

More than four in 10 consumers with household incomes of $100,000 or more will buy more of their gifts online this year, compared to 28% of those with incomes of $50,000 or less. More than four in 10 shoppers (42%) say they'll do more pre-purchase online research this year than they did last year. Even among shoppers who have a specific brand in mind, 85% will do some sort of research before buying.

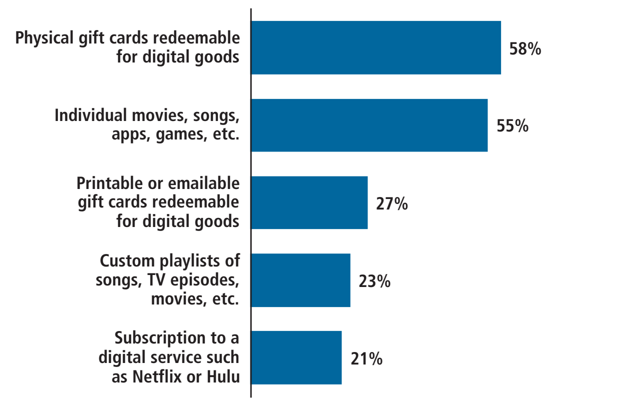
WHERE HOLIDAY SHOPPERS BEGIN LOOKING FOR GIFT IDEAS



SOURCE: Elastic Path Software

DIGITAL GOODS SHOPPERS PLAN TO BUY AS HOLIDAY GIFTS

(Among those who plan to buy digital goods as gifts)



SOURCE: Elastic Path Software

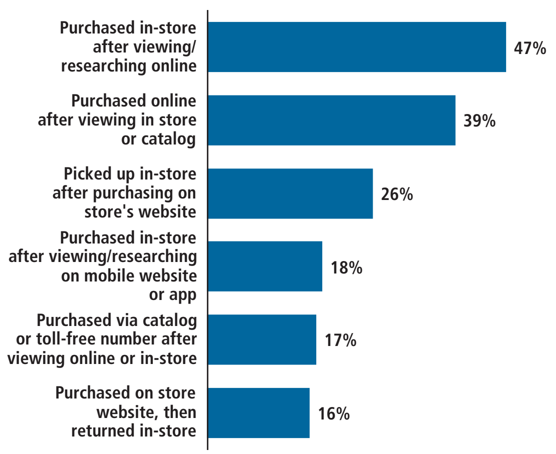
Mobile Shopping Is On the Rise

Online sales during November 2011 are expected to be 12%-15% higher than they were in November 2010, according to IBM Coremetrics. Of all visitors to retail websites in November, 15% are expected to be accessing the site via mobile devices. In October 2011, 11% of consumers used mobile devices to visit retailers' sites, up from 4% in October 2010. Just under one in 10 consumers who visited retail websites from social networks (9%) made purchases in October 2011.

Of the 42% of Americans who own smartphones, 27% say they'll use the devices for holiday shopping in 2011, according to Deloitte. Men are more likely than women to use smartphones for holiday shopping (31% of men vs. 24% of women), but women are more likely than men to use social media for holiday shopping (48% of women vs. 41% of men).

CROSS-CHANNEL SHOPPING BEHAVIOR

(% who have done so)



SOURCE: Deloitte

In both cases, the gender differences in holiday shopping reflect differences in overall usage as well (more men than women own smartphones, and more women than men use social media).

SOURCES: "Deloitte's 2011 Annual Holiday Survey," October 2011, Deloitte, Alison Paul, Vice Chairman, U.S. Retail and Distribution Leader, 2 World Financial Center; 212-436-2000; also, Courtney Flaherty, Retail; 203-905-2708; cflaherty@deloitte.com; www.deloitte.com. Price: Available online at no charge.

"Virtual Goods Mean Real Money This Holiday," Elastic Path Software, Amanda Dhalla, Ecommerce Consultant, 300-455 Granville St., Vancouver, BC, V6C 1T1 Canada; 604-408-8078; info@elasticpath.com; www.elasticpath.com. Price: Available online at no charge.

"2011 Holiday Shopping Trends," Shopper Sciences, Jeff Griffin, SVP/GM, 384 Northyards Blvd., Atlanta, GA 30313; 404-954-8335; also, Devora Rogers; devora.rogers@shoppersciences.com; www.shoppersciences.com. Price: Available online at no charge.

"IBM Coremetrics Benchmark," November 2011, IBM Industry Solutions, John Squire, Director, Product Management, Enterprise Marketing Management Group, 1 New Orchard Rd., Armonk, NY 10504; 650-645-8196; jsquire@us.ibm.com; www.ibm.com. Price: Selected data available online.

Consumers Plan To Spend Less Than Or Same As Last Year For Holidays; Most Spending Is For Family

Almost nine in 10 consumers (87%) plan to spend less than or the same as they did last year on holiday gifts in 2011, according to an Ipsos Public Affairs survey for Offers.com.

Americans expect to spend an average of $515.94 on gifts for family, friends, coworkers, and others, according to a BIGresearch study for the National Retail Federation. Gifts for family members account for 78% of total holiday gift spending, at an average of $403.26 (calculations by Research Alert).

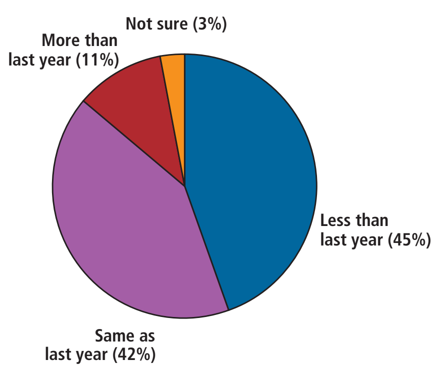
Total holiday spending is projected at $704.18 per person, including gifts, decorations, food, and other items. Men expect to spend somewhat more than women do — an average of $721.25 compared to $687.94. Those who live in the Northeast will spend more than those in other regions: $780.19, compared to $693.89 among residents of the South, $683.15 among those in the West, and $680.71 among those in the Midwest.

Consumers with household incomes of $50,000 or more expect to spend nearly twice as much as those with incomes below $50,000 — an average of $963.15 compared to $504.98.

If merchandise and pricing were the same, 69% would prefer to do their holiday shopping in retail stores; 26% would prefer to shop online, according to Ipsos. Almost half (47%) say they would shop online if that's where the better deals were this season, though 46% would still prefer to shop in-store.

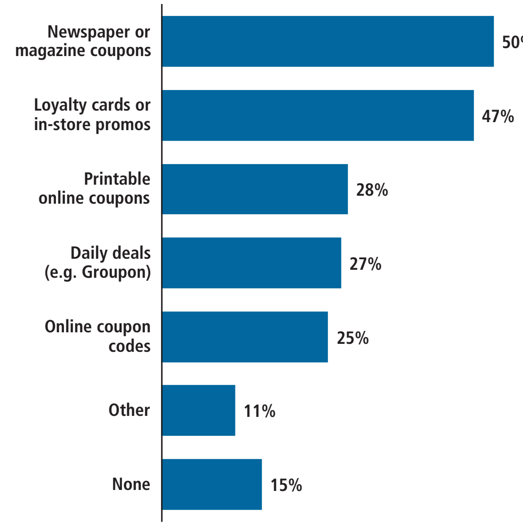
Women (49%) are more likely than men (39%) to say they plan to spend less on holiday gifts this year than last year, and they're more likely than men to say they'll look for online coupons or coupon codes before making holiday purchases (52% vs. 43%). Coupons are also more popular with holiday shoppers under age 55 than with older shoppers (53% vs. 37%). Four in 10 online shoppers say they always

HOW MUCH CONSUMERS EXPECT TO SPEND ON HOLIDAY PURCHASES IN 2011, COMPARED TO 2010



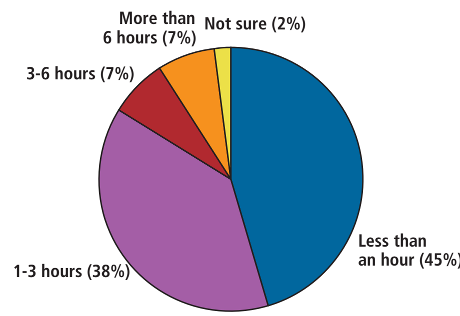
SOURCE: Ipsos Public Affairs for Offers.com

COUPONS OR PROMOTIONS USED IN THE PAST 30 DAYS



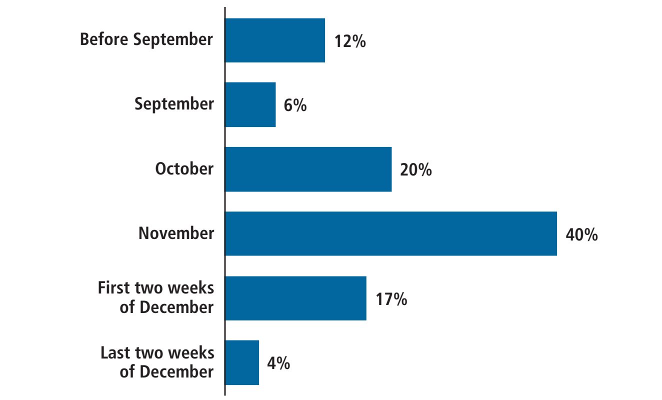
SOURCE: Ipsos Public Affairs for Offers.com

HOW MUCH TIME CONSUMERS SPEND DOING PRICE RESEARCH FOR EACH HOLIDAY PURCHASE



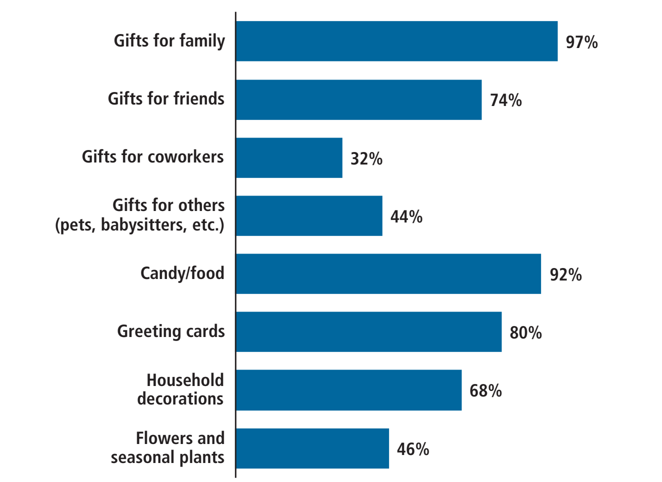
SOURCE: Ipsos Public Affairs for Offers.com

WHEN AMERICANS START SHOPPING FOR THE WINTER HOLIDAY SEASON



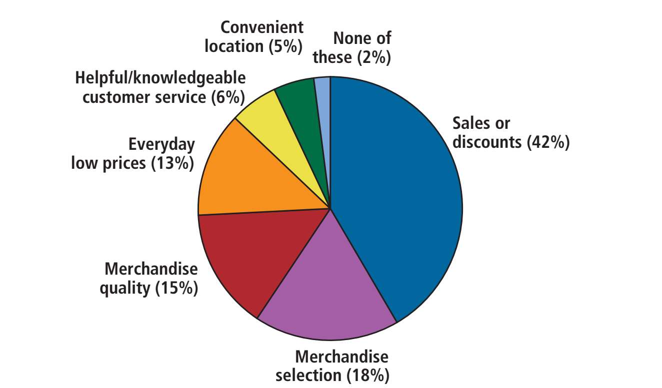
SOURCE: BIGresearch

HOLIDAY PURCHASES AMERICANS PLAN TO MAKE IN 2011



SOURCE: BIGresearch

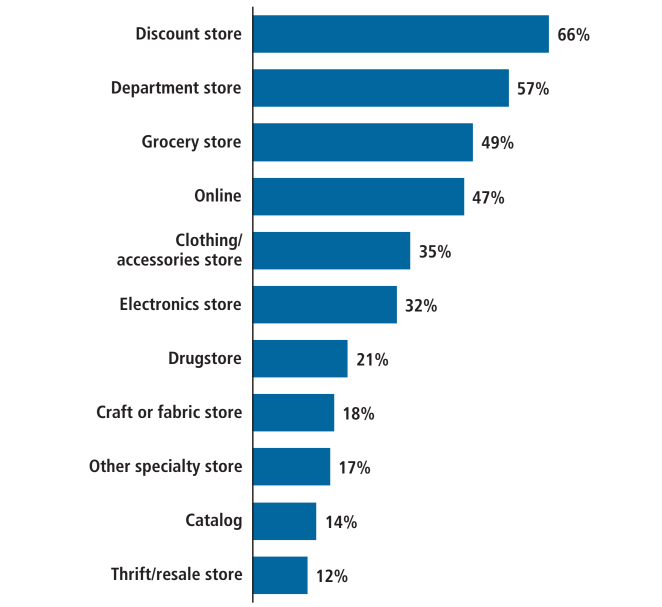
MOST IMPORTANT FACTOR IN CHOOSING WHERE TO SHOP FOR HOLIDAY ITEMS



NOTE: Total is greater than 100% due to rounding.

SOURCE: BIGresearch

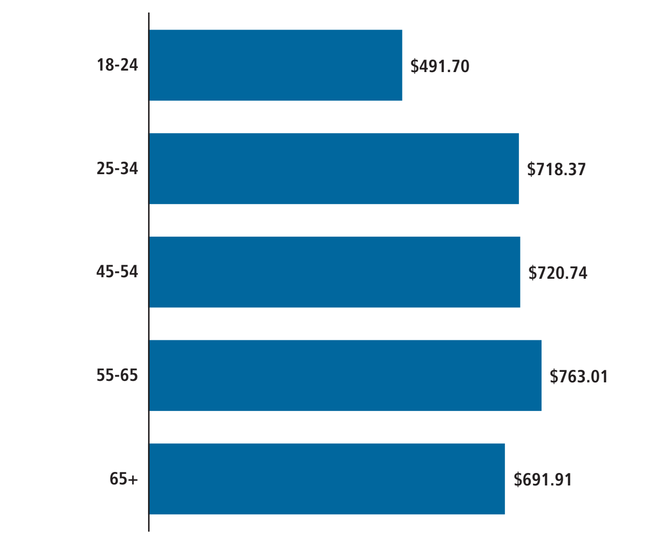
WHERE CONSUMERS PLAN TO BUY HOLIDAY ITEMS IN 2011



NOTE: Multiple responses allowed.

SOURCE: BIGresearch

HOW MUCH AMERICANS EXPECT TO SPEND ON HOLIDAY ITEMS IN 2011, BY AGE



NOTE: Includes gifts, decorations, greeting cards, food, plants; does not include holiday travel.

SOURCE: BIGresearch

(16%) or usually (24%) look for coupons or promotion codes when they're shopping online.

More than half of U.S. mobile owners (52%) plan to use their mobiles for shopping-related functions more during the 2011 holiday season than they did in 2010, according to

JiWire. Another 28% expect to use them as often as they did last year. Only 14% won't be using them at all.

Mobile devices are considered most helpful for comparing prices, researching products and/or reading reviews, and finding coupons or promotions.

The majority of Americans start their holiday shopping in October or November, though a fifth wait until December, according to BIGresearch.

Nearly all Americans plan to buy holiday gifts for family members, and the majority will buy them for friends, but fewer than a third plan to buy them for coworkers.

Consumers who will buy holiday greeting cards expect to spend an average of $33.37 on the cards plus postage. Those who will buy decorations plan to spend $68.33. Fewer than half expect to buy flowers or seasonal plants, but those who do plan to buy them expect to spend $39.71 on them. Food is a significant expense; holiday shoppers who plan to buy candy and seasonal foods will spend an average of $105.42.

Women are more likely than men to plan to shop for holiday items at discount stores, grocery stores, and craft or fabric stores, while men are more likely than women to plan to shop at electronics stores. When asked to choose the most important factor in choosing which store to shop for holiday items, more women than men cite sales or discounts (47% vs. 36%).

Almost half of Americans (47%) plan to do at least some of their holiday shopping online, but only about a fifth plan to do more than half of it online. Six in 10 shoppers (60%) plan to take advantage of holiday sales and/or discounts to buy additional (non-gift) items for themselves or their families, and they anticipate spending $217.89 on these purchases.

SOURCES: "Fall Shopping Poll," October 2011, Ipsos Public Affairs for Offers.com. Ipsos Public Affairs, Julio Franco, Senior Research Manager, 1271 Ave. of the Americas, New York, NY 10020; 646-313-6117; info@ipsos-na.com; www.ipsos-na.com. Price: Available online at no charge. Offers.com, div. of Vertive Inc., Steve Schaffer, CEO, 3271 Executive Center Dr., #100, Austin, TX 78731; 512-342-8378; www.offers.com.

"Mobile Audience Insights Report, Q2 2011," JiWire, David Blumenfeld, SVP Strategy & Business Development, 150 Post St., #500, San Francisco, CA 94108; 415-821-8600; insights@jiwire.com; www.jiwire.com. Price: Available via online subscription at no charge.

"2011 Holiday Consumer Intentions and Actions Survey," BIGresearch for the National Retail Federation. BIGresearch, Kim Rayburn, SVP Client Solutions & Marketing, 400 W. Wilson Bridge, #200, Worthington, OH 43085; 614-846-0146; kim@bigresearch.com; www.bigresearch.com. Price: Available online at no charge. National Retail Federation, Matthew Shay, President/CEO, 325 7th St., NW, Washington, DC 20004; 202-783-7971; shaym@nrf.com; www.nrf.com.

Holiday Spending: Fewer Shoppers Reaching For Packaged Media, As More Go For Tablets, Electronics

Spending data on the recent four-day Thanksgiving shopping weekend reveals an entertainment consumer base in transition, as fewer shoppers reached for packaged media products than in 2010, while more consumers snapped up tablets and other electronics.

The total number of Thanksgiving holiday shoppers (age 18 and older, shopping between Thursday and Sunday) rose to 226.8 million, up 6.7% from the same four-day period in 2010, according to BIGresearch survey data for the National Retail Federation's Shop.org website (calculations by ENTERTAINMENT MARKETING LETTER). The number of shoppers who purchased books, CDs, DVDs, videos, or videogames during the period declined by 6.2% year over year, to 83.9 million.

Still, the number of shoppers purchasing consumer electronics or computer-related accessories during the 2011 weekend increased by 6.9% from the same period in 2010, to 89.5 million.

Sales of tablets are reportedly proving more popular than ever among holiday shoppers — auguring well for marketers of digital entertainment in 2012.

Apple, which offered a rare (albeit small) discount on iPads and other items on Black Friday, was reported to have surpassed its own retail sales forecasts. One Piper Jaffray analyst who polled Apple retail stores on Black Friday (Nov. 25) found that each location was selling nearly 15 iPads per hour, a rate that was 68% higher than during Black Friday in 2010.

Meanwhile, at Amazon.com, customers purchased four times as many Kindle devices as they did during Black Friday 2010, according to the company. Although Amazon did not disclose how many Kindle units it sold over the four-day weekend, it noted that its new $199 Kindle Fire was the best-selling item across the entire site. "In addition," said the company's Dave Limp, "we're seeing a lot of customers buying multiple Kindles — one for themselves and others as gifts."

THANKSGIVING WEEKEND SPENDING ESTIMATES, 2011

Survey of shoppers age 18 and older

	2009	2010	2011
Estimated number of shoppers (millions)	195.5	212.5	226.8
Shoppers who purchased books, CDs, DVDs, videos, or videogames	40.3%	42.1%	37.0%
Shoppers who purchased consumer electronics or computer-related accessories	36.9%	36.7%	39.4%
Average individual holiday shopping spend	$343.31	$365.34	$398.62

NOTE: Period spans Thanksgiving Thursday, Black Friday, and following Saturday and Sunday (e.g., Nov. 24-27, 2011).

SOURCE: BIGresearch survey conducted for Shop.org

SOURCES: Amazon.com, David Limp, VP Amazon Kindle, 206-266-1000; www.amazon.com.

Apple, Matt Fischer, Director App Store, 408-974-0828; matt.fischer@apple.com; www.apple.com.

BIGresearch, Kim Rayburn, SVP Client Solutions & Marketing, 614-846-0146; kim@bigresearch.com; www.bigresearch.com.

National Retail Federation, Mike Gatti, SVP Member Relations, 202-626-8117; gattim@nrf.com; www.nrf.com.

Consumers Anticipate Holiday Spending

More than a third of U.S. consumers are planning to spend less on holiday gifts in 2011 than they did in 2010, according to BIGresearch. Fewer than one in 10 expect to spend more.

Compared to September 2010, consumers say they're shopping for sales more often (45%), making fewer shopping trips (45%), choosing to shop at stores closer to home (44%), buying more store brands or generics (38%), and using ad circulars for comparative shopping more often (32%). Consumers are also using their credit cards more often to pay for staples such as gas and groceries than they did last year.

Buying For Babies

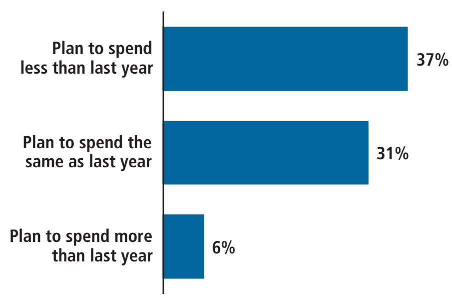
Among the 12% of consumers who shop for baby products, 48% prefer to buy these items at discount stores.

Price is the top criterion when choosing where to buy baby products (67% say so), followed by location (43%), selection (39%), quality (33%), and selection of brands (26%) [multiple responses were allowed].

More than a third of consumers who buy baby products shop for them most often at Walmart (35%); 40% of women do so. Walmart is the top store for more specific baby equipment as well, such as strollers or cribs (15% shop there most often for these products); 10% shop at Babies R Us, and 6% shop at Target.

Consumers who buy baby products spend an average of $31.70 per month on them; 24% spend $50 or more per month.

HOLIDAY SPENDING PLANS FOR 2011



SOURCE: BIGresearch

SOURCE: "Consumer Intentions and Actions, September 2011," BIGresearch, Kim Rayburn, SVP Client Solutions & Marketing, 400 West Wilson Bridge, #200, Worthington, OH 43085; 614-846-0146; biginfo@bigresearch.com; www.bigresearch.com.

Middle-Income Military Families More Likely To Cut Back On Gifts, Not Decorations

Seven in 10 military families with household incomes of at least $50,000 (70%) plan to cut back on their holiday spending this year, according to First Command Financial Services. More than four in 10 (42%) expect to reduce their gift budgets by at least $400 compared to last year.

Military families are more likely than civilian families to plan on shopping on Black Friday (43% vs. 36%) and to plan to do most or all of their gift-buying during that day (37% vs. 27%)

WAYS MILIARY FAMILIES ARE CUTTING BACK THEIR SPENDING THIS HOLIDAY SEASON

Give fewer gifts per person	32%
Set a maximum amount on gifts	31%
GIves gifts to fewer people	28%
Stay closer to home/reduce travel	26%
Spend less on decorations	21%
Buy gifts from discount stores	20%
Spend less on food	18%
Make gifts themselves	10%

SOURCE: First Command Financial Services

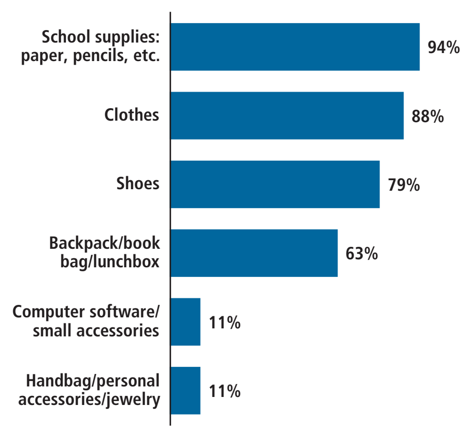
SOURCE: First Command Financial Services, Mark Leach, 1 FirstComm Plz., Fort Worth, TX 76109; 817-569-2419; msleach@firstcommand.com; www.firstcommand.com.

Back-To-School Shoppers Are Researching Online But Buying In-Store

Back-to-school shoppers plan to spend an average of $603.63 for fall 2011, a projected total of $22.8 billion for children in elementary, middle, and high school, according to BIGresearch for the National Retail Federation. When spending on clothing, electronics, furnishings, and other school supplies for college students is added to the mix, the projected total is $68.8 billion, up modestly from the $67.2 billion spent in 2010.

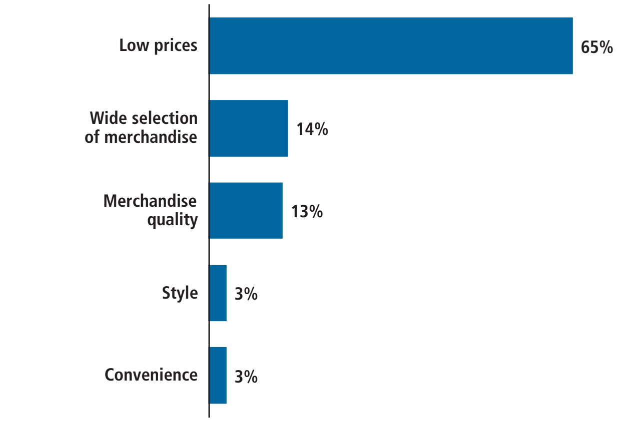
More than half of parents (55%) of children in grades K-12 plan to spend about the same on back-to-school items for their children as they did in 2010, according to Deloitte.

BACK-TO-SCHOOL ITEMS PARENTS PLAN TO PURCHASE, 2011



SOURCE: Deloitte

MOST IMPORTANT FACTORS IN PARENTS' CHOICE OF WHERE TO SHOP FOR BACK-TO-SCHOOL



SOURCE: Deloitte

HOW SMARTPHONE OWNERS WILL USE THE DEVICES FOR BACK-TO-SCHOOL SHOPPING

SOURCE: Deloitte

Three in 10 (31%) say they plan to spend more, while 14% will spend less.

Among parents who expect to spend more this year, six in 10 (60%) say they seem to spend more every year than they did the year before. Nearly a third (32%) say they have to spend more because school budget cuts are requiring parents to pick up the slack and help equip the classrooms (multiple responses were allowed).

Despite financial pressures, 63% of parents are excited about doing their back-to-school shopping, according to Toluna research for Buy.com. A third admit that they "love" school supplies, and 28% consider back-to-school shopping a "necessary evil." Another 10% say they'd rather be doing anything else.

Moms get most excited about picking out clothes and shoes for their kids (52%), while a quarter (25%) prefer buying basic school supplies such as notebooks and pens, 11% like buying backpacks or lunchboxes best, and 10% get most excited about art supplies and equipment.

AVERAGE SPENDING ON BACK-TO-SCHOOL ITEMS FOR CHILDREN IN GRADES K-12, BY PRODUCT CATEGORY

(Among those who plan to buy the items)

Clothing/accessories (excluding shoes)	$236.70
Shoes	$113.72
School supplies (e.g., notebooks, backpacks)	$96.04
Computers/electronics	$365.48

SOURCE: BIGresearch for National Retail Federation

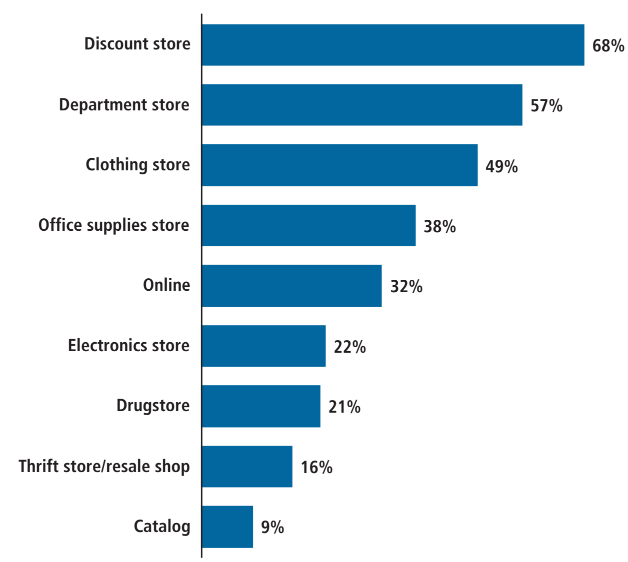
Where They Shop

When deciding where to shop, nearly two thirds of parents focus on finding low prices, according to Deloitte. No other attribute comes close to price in importance.

Although the Internet isn't a leading channel for back-to-school purchases, many parents research products and look for promotions online. Four in 10 parents (41%) will visit retailers' websites to print out coupons before shopping, according to PriceGrabber.

More than a third of back-to-school shoppers (35%) say they'll use social media to help them shop, up from 29% in 2010, reports Deloitte. Almost two thirds of back-to-school shoppers (64%) who own smartphones will use them in the shopping process. Three in 10 back-to-school shoppers (30%) who own tablets will use them to buy items for their children in grades K-12, according to the National Retail Federation. Nearly half of college students who own tablets plan to use the devices for their own back-to-school shopping.

WHERE PARENTS PLAN TO SHOP FOR BACK-TO-SCHOOL



NOTE: Multiple responses allowed

SOURCE: BIGresearch for National Retail Federation

When They Shop

Most parents still hold off until at least August to start their back-to-school shopping. Half (49%) said they would start making purchases in August, up from 38% in 2010, according to PriceGrabber. Only 14% began shopping in June, down from 26% in 2010.

More than half of parents (58%) start their shopping a few weeks before school begins, and 11% describe themselves as last-minute shoppers, according to Buy.com and Toluna.

SOURCES: "Back-to-School 2011," BIGresearch/National Retail Federation. BIGresearch, Kim Rayburn, SVP Client Solutions and Marketing, 450 W. Wilson Bridge, #370, Worthington, OH 43805; 614-846-0146; kim@bigresearch.com; www.bigresearch.com. National Retail Federation, Matthew Shay, President/CEO, 325 7th St., NW, #1100, Washington, DC 20004; 202-783-7971; shaym@nrf.com; www.nrf.com. Price: Available online at no charge.

"2011 Back-to-School Shopping Survey," July 2011, Deloitte, Alison Paul, Vice Chairman and U.S. Retail Sector Leader, 111 S. Wacker Dr., Chicago, IL 60606; 312-486-1000; also, Courtney Flaherty, Public Relations, Retail; 203-905-2708; cflaherty@deloitte.com; www.deloitte.com. Price: Available online at no charge.

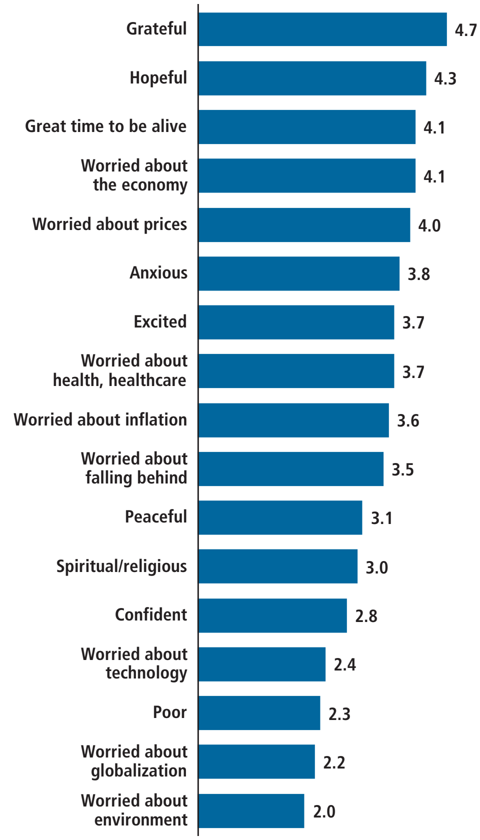
Buy.com, Neel Grover, CEO/President, 100 Aliso Viejo, CA 92656; 949-448-5400; www.buy.com. Toluna, 21 River Rd., Wilton, CT 06897; 203-834-8585; info@toluna.com; www.toluna.com. Price: Contact for information.

"Back-to-School Shopping Forecast," 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: Contact for information.

Snapshot of Consumer Attitudes

Consumers were most commonly feeling hopeful and grateful at the start of 2011, according to the Consumer Network. However, they also worry about the economy and prices for goods and services. Their greater expression of positive feeling may be more reflective of an attempt to ward off the negative vibes they also feel than a direct sentiment, suggests the researcher.

CONSUMER ATTITUDES, JANUARY 2011



NOTE: Based on a scale of one to five, where five describes them very well and one does not describe them at all.

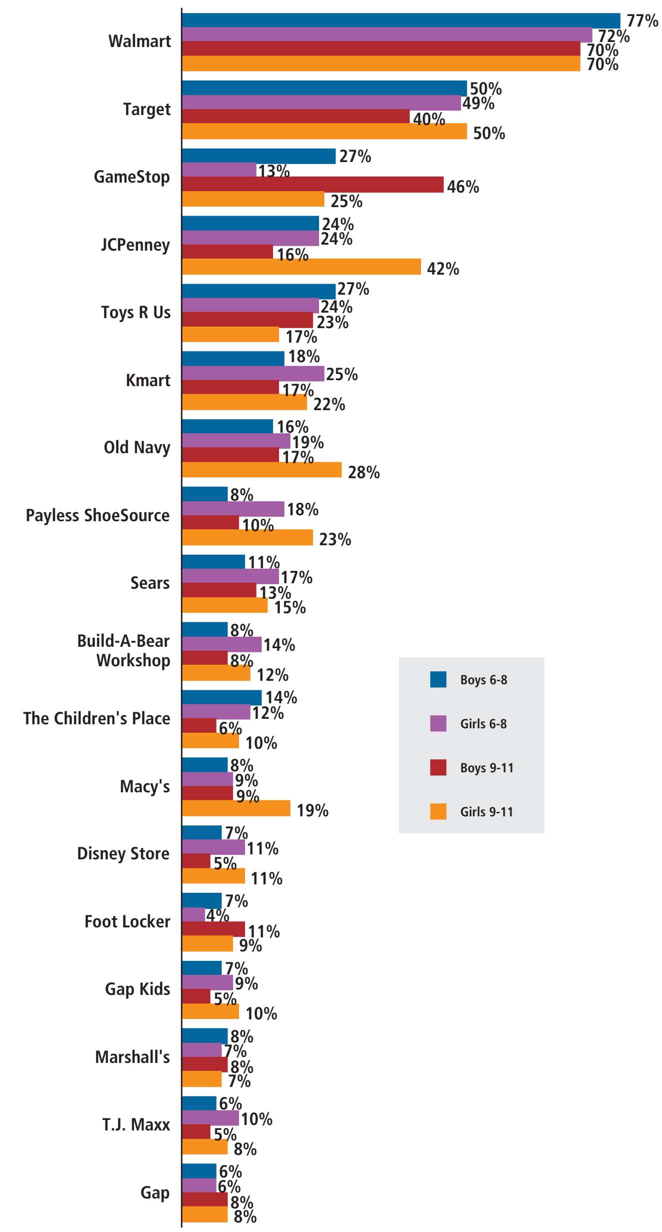
SOURCE: Consumer Network

SOURCE: "Feeling Grateful," *The Shopper Report*, January 2011, The Consumer Network, Mona Doyle, PO Box 42753, Philadelphia, PA 19101; 215-235-2400; shopperreport@cs.com. Price: $99 for a one-year subscription.

Tweens Most Frequently Visit Walmart

Nearly three in four children 6-11 (72%) visited a Walmart store during the past month, according to Mintel. Nearly half have roamed the aisles at Target. Kids presence at other retailers varies by age and sex. Girls 9-11 are much more likely than younger girls and boys in general to visit JCPenney and Macy's. Boys are significantly more likely than girls to frequent Foot Locker and GameStop.

RETAILERS KIDS AGE 6-11 VISITED DURING THE PAST MONTH



SOURCE: Mintel

SOURCE: Mintel, Joanna Peot, 351 Hubbard St., 8th Fl., Chicago, IL 60610; 312-628-7946; jpeot@mintel.com; www.mintel.com.

Top Influencers For Children's, Teens' Book Purchases

Seven in 10 kids' books (70%) are purchased by women, according to Bowker/PubTrack and the Association of Booksellers for Children. The report segments book purchasing into three categories — adults buying for those under seven, adults buying for kids 7-12, and teen buyers 13-17.

The analysis finds 80% of kid book purchases are not planned, with 40% classifed as "pure impulse." Adults purchase books for those under seven by listening to friends and family recommendations and browsing at bookstores. Public libraries influence children in their discovery of books.

Teens, by comparison, are most heavily influenced by parents, teachers, and close friends. While text messages and using Facebook are their two favorite fun leisure time activities, reading books ranks third. Notably, 80% of teens don't read e-books (yet).

WHERE KID'S BOOKS ARE PURCHASED/OBTAINED

1. School, public libraries
2. Barnes & Noble
3. Sam's Club/Walmart
4. Amazon
5. Borders
6. Target/Costco
7. Independent bookstores

SOURCES: Bowker/PubTrack, Association of Booksellers for Children

FACTORS THAT INFLUENCE TEENS TO PICK ONE BOOK OVER ANOTHER

1. It's a sequel
2. Familiar author
3. Back/flap copy
4. Title
5. Cover

SOURCES: Bowker/PubTrack, Association of Booksellers for Children

SOURCES: Association of Booksellers for Children, Kristen McLean, Executive Director, 6538 Collins Ave., #168, Miami Beach, FL 33141; 617-390-7759; Kristen@abfc.com; www.associationofbooksellersforchildren.com.

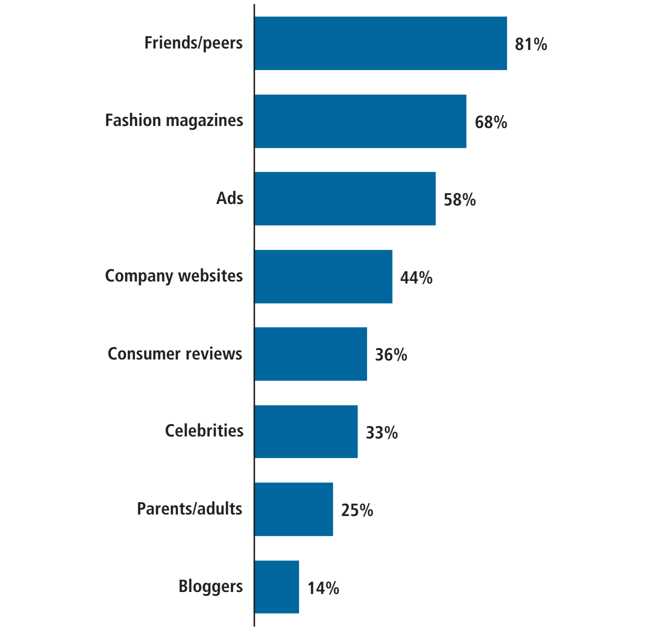
Bowker/PubTrack, Natalie Piccotti, Marketing Manager, 630 Central Ave., New Providence, NJ 07974; 908-286-1090; natalie.piccotti@bowker.com; www.pubtrackonline.com.

Teen Girls Love To Shop And Spend

More than four in 10 teen girls 13-18 (41%) have purchased 10 or more items of clothing in the past six months, according to Varsity Brands and Ketchum Global Research Network. An additional 21% have purchased 5-9 apparel items. Unsurprisingly given their spending, 80% claim shopping is one of their top hobbies and activities.

Four in 10 teen girls have purchased at least five CDs or online music items in the past six months and 31% have purchased at least five makeup or skincare products.

RESOURCES TEEN GIRLS RELY ON TO LEARN ABOUT LATEST TRENDS



NOTE: Multiple responses permitted

SOURCES: Varsity Brands, Ketchum Global Research Network

Teen girls serve as brand ambassadors. Half (53%) "believe their opinions greatly influence their friends' purchasing decisions." Eight in 10 (79%) have recommended or discussed apparel with a friend or family member in the past six months. During this same time frame, 72% have discussed books/magazines, 66% makeup/skincare, and 60% mobile products.

SOURCES: Ketchum Global Research Network, Joanne Puckett, EVP Global Research, 200 E. Randolph St., #3530, Chicago, IL 60601; 312-228-6886; Joanne.puckett@ketchum.com; www.ketchum.com.

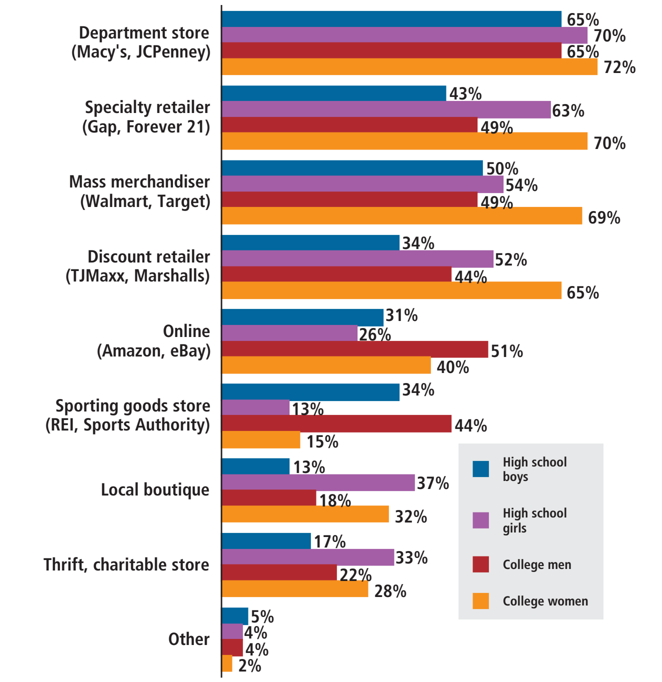
Varsity Brands, Marlene Cota, VP Corporate Alliances, Business Development, 6745 Lenox Center Court, #300, Memphis, TN 38115; 901-387-4306; mcota@varsityspirit.com; www.varsity.com.

High School & College Students' Shopping Behaviors And Preferences

High school girls spend nearly twice as much per month on clothing and accessories as high school boys ($124.96 vs. $65.82), according to Ypulse. College women also spend slightly more than their male counterparts ($139.46 vs. $111.40).

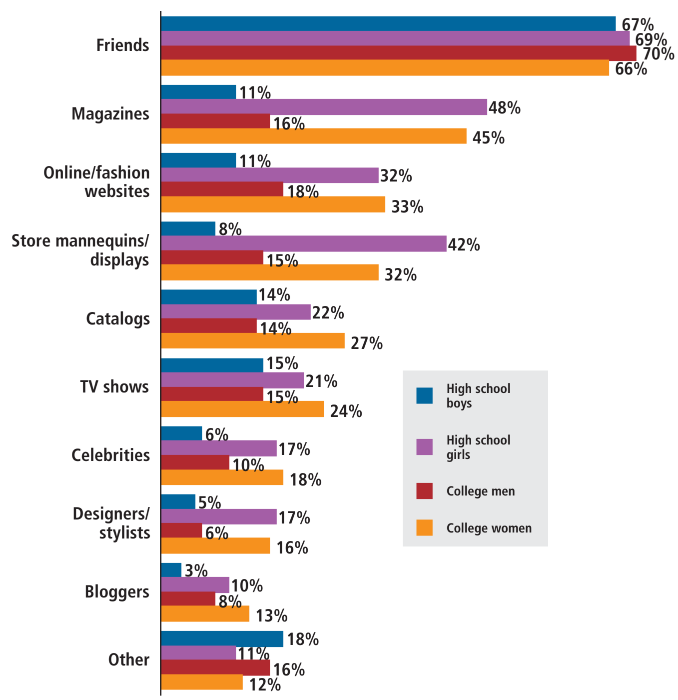
While both high school boys (62%) and girls (68%) have budgets when shopping for clothing and accessories, girls are more likely than boys to spend their own money (58% vs. 39%). Parents are also more likely to give high school-aged sons money for clothes than they are to give funds to daughters (65% vs. 56%).

WHERE HIGH SCHOOL AND COLLEGE STUDENTS PREFER TO SHOP, 2011



SOURCE: Ypulse

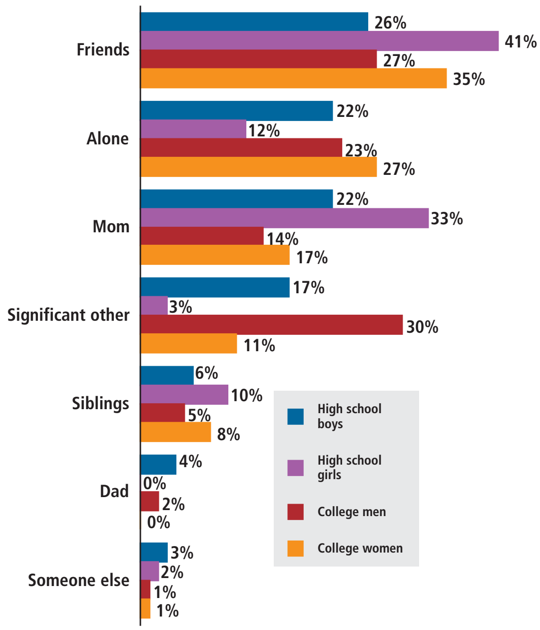
WHERE HIGH SCHOOL AND COLLEGE STUDENTS GET FASHION ADVICE, 2011



SOURCE: Ypulse

Friends are high school students' preferred shopping partners, though high school girls also enjoy outings with

HIGH SCHOOL AND COLLEGE STUDENTS' PREFERRED SHOPPING PARTNERS, 2011



SOURCE: Ypulse

their moms. Girls are more likely than boys to shop specialty retailers, discount stores, local boutiques, and thrift shops. Boys, conversely, prefer sporting goods retailers. Both genders enjoy shopping at department store chains.

High school students are nearly twice as likely as college students to describe their style as "unique," whereas college students are significantly more likely than high school students to describe their style as "classic, smart, and sophisticated."

Nearly one in two high school boys (48%) and girls (45%) have sought out an item they saw a character wear on TV or in a movie. While fewer than two in 10 students look to celebrities for fashion advice, boys admire the styles of Brad Pitt, Johnny Depp, and Justin Timberlake. Girls get inspiration from Selena Gomez, Jennifer Aniston, Lauren Conrad, and Taylor Swift.

AMOUNT SPENT SHOPPING BY HIGH SCHOOL AND COLLEGE STUDENTS, PER TRIP, 2011

High school boys	$79.58
High school girls	$89.15
College men	$99.25
College women	$78.52

SOURCE: Ypulse

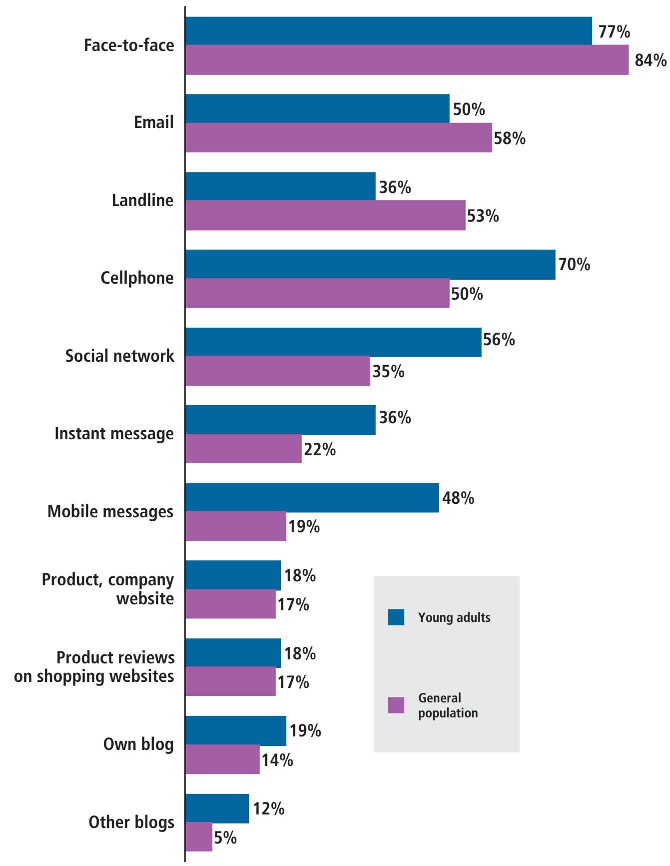
SOURCE: Ypulse, Melanie Shreffler, Editor-in-Chief, 299 Broadway, #1900, New York, NY 10007; 212-646-597-6726, x306; melanie@ypulse.com; www.ypulse.com.

Young Adults Turn To "New School" Methods To Discuss And Recommend Products

When discussing or recommending products or services, young adults use an average of 4.5 different communication methods, compared to members of the general population who use 3.9 methods, according to Colloquy.

Young adults tend to use "new school" channels, such as social networks, instant messages, and text messages. They are less likely to use "old school" channels, such as email, landline phones, and face-to-face conversations.

WAYS PEOPLE RECOMMEND OR DISCUSS PRODUCTS OR SERVICES, 2011



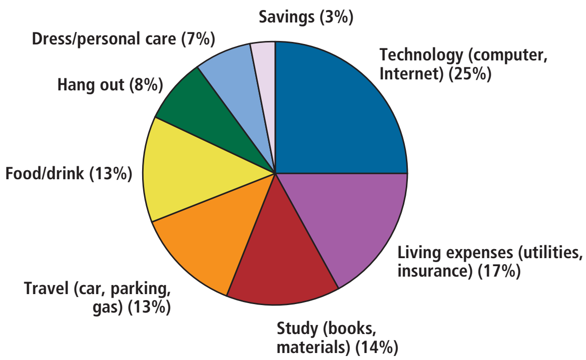
NOTE: More than one response permitted.

SOURCE: Colloquy

SOURCE: Colloquy, Josh Milner, 4445 Lake Forest Dr., #200, Cincinnati, OH 45242; 513-248-5918; josh.milner@colloquy.com; www.colloquy.com.

"Almost-Adults" Spend $785 A Month On Discretionary Expenses

There are more than 10.5 million "Almost-Adults" — two- and four-year college and graduate students ages 17-24 —



SOURCE: Moosylvania

living in the U.S., and they represent significant opportunities for brands as they transition from being dependent upon their parents to financially independent adults.

"Almost-Adults" aren't depriving themselves, despite an uncertain economy. More than half (52%) are keeping their discretionary spending steady or increasing it, compared to 38% of those ages 25-35 who are doing the same, according to Moosylvania, a marketing agency specializing in this segment.

Cash Or Credit?

"Almost-Adults" say they most often pay for their purchases using a debit card (61%), with the remaining purchases paid for with cash (23%) or credit card (16%). They use their credit cards most often for groceries (77%), at restaurants/bars (55%), for online purchases (55%), and for transportation (46%).

Every "Almost-Adult" has his or her own cellphone, with 77% saying their parents pay for it. Parents (97%) are also students' top resource for financial information; 35% rely on Google, 32% seek advice from friends, and 16% use company websites.

Parental Influence

Parents wield significant influence over their 17-24-year-old offspring, particularly regarding their choice of a wireless carrier (they stick with the same brand once their parents stop paying for their service) and toothpaste brand. However, this influence diminishes as their children become more independent.

Wireless And Landline-Less

This group is tech-savvy and connected. More than six in 10 (62%) connect to the Internet wirelessly using a laptop or hand-held device, and 55% visit social networks daily. Four in 10 (41%) only use cellphones, forgoing landlines, and they send an average 20 texts per day (much lower than most other estimates we've seen).

SOURCE: Moosylvania, Rodney Mason, CMO, 7303 Marietta Ave., St. Louis, MO 63143; 314-644-7987; rodney@moosylvania.com; www.moosylvania.com.

factoids

- Dollar sales of women's upscale **skincare products** were 14% higher in the first half of 2011 than they were during the same period in 2008. *(NPD Group; phone: 516-625-0700)*
- Americans spent 11% more on **lipstick** and other lip color products in January-April 2011 than they did in January-April 2010. *(The NPD Group; phone: 516-625-0700)*
- Americans spent $272.8 million on **dental floss** between January 2010 and January 2011, up 4% from the previous year. *(Nielsen; phone: 646-654-5000)*
- Nearly three quarters of consumers (72%) say that **customer service** is key in their decision to recommend a product or service to friends and family, and 69% would tell a friend or family member about a poor customer service experience. *(Spherion; phone: 800-422-3819)*
- The vast majority of consumers say unclean restrooms (95%) and unpleasant odor (92%) would negatively impact their perception of a **retail store**, even more than cite poor customer service (90%). *(Cintas; phone: 513-573-4211)*
- Only 70% of the clothing in most **people's drawers** actually gets worn. *(Hanes; phone: 336-519-6250)*
- Almost two thirds of women (65%) would rather **shop** for products for their homes than for shoes. *(HomeGoods; phone: 508-390-1000)*
- May is the biggest month for sales of **storage containers**. *(BSM Media; phone: 954-943-2322)*
- Almost nine in 10 **impulse purchases** (88%) are made because the product is on sale. *(The Hartman Group; phone: 425-452-0818)*
- Six in 10 women (60%) have made an **impulse purchase** in the past year. *(Milo.com; phone: 650-391-9346)*
- Of the 64% of U.S. shoppers who bought at least some **holiday gifts** online during the 2010 holiday season, 5% did all their shopping on the Internet. *(BIGresearch; phone: 614-846-0146)*
- Shoppers who go to a store by car are 44% more likely to make **unplanned purchases** than those who walk there. *(Milo.com; phone: 650-391-9346)*
- Almost a quarter of consumers (22%) stopped doing business with a company due to bad **customer service** in 2010. *(Satmetrix; phone: 650-227-8300)*
- Seven in 10 U.S. adults (70%) are willing to spend more for products and services offered by companies with excellent **customer service**. *(American Express; phone: 212-640-1627)*
- A quarter of consumers shopping for **back-to-school** (25%) will spend $500 or more on these purchases. *(PriceGrabber; phone: 323-601-1200)*
- More than one in 10 **mobile shoppers** (12%) make purchases on their phones at least once a week. *(Price Grabber/Experian; phone:323-601-1200)*

FAST FACTS: Coupons

- Americans' use of **coupons** to buy groceries has grown 24% since 2006. *(Scarborough Research; phone: 646-654-8400)*
- More than 96% of consumers who use **coupons** say they wouldn't stop using them even if they won the lottery. *(RedPlum; phone: 734-591-3000)*
- Almost half of online consumers worldwide (48%) use **coupons** to save on household items. *(Nielsen; phone: 646-654-5000)*
- U.S. consumers saved $2 billion in the first six months of 2011 by using **coupons**. *(NCH Marketing Services; phone: 847-317-5500)*

- More than three quarters of U.S. consumers (77%) say their household budgets are being affected by the cost of **gasoline**. *(BIGresearch; phone: 614-846-0146)*
- Almost four in 10 U.S. consumers (38%) think some **store brands** offer better quality than name brands. *(Nielsen; phone: 646-654-5000)*
- Just over one in 10 online Americans (12%) would trust Facebook to process **mobile payments**. *(Ogilvy & Mather; phone: 212-237-4000)*
- More than six in 10 shoppers (62%) search for **deals online** before at least half of their shopping trips. *(Booz & Co.; phone: 212-697-1900)*
- 78% of U.S. adults consider buying "green" products a way to shop with their **values**. *(NBCUniversal; phone: 212-664-5191)*
- More than half of U.S. consumers (53%) have bought **groceries** at Walmart in the past 90 days. *(BIGresearch; phone: 614-846-0146)*
- The average U.S. man takes 26 minutes to find what he's **shopping** for before leaving a store. *(*Men's Health*; phone: 212-808-1429)*
- Four in 10 consumers (41%) expect to spend less on **footwear** in the next few months. *(The NPD Group; phone: 516-625-0700)*
- Americans are expected to spend $50.8 billion on their **pets** in 2011. *(American Pet Products Association; phone: 203-532-0000)*
- Just under a quarter of Americans (23%) had begun their **holiday shopping** by the beginning of November. *(Rasmussen Reports; phone: 732-776-9777)*
- The average American adult planned to spend $72.31 on **Halloween** costumes, candy, and/or decorations in 2011. *(National Retail Federation; phone: 202-783-7971)*
- More than two thirds of U.S. adults (68%) would avoid returning to a retail store where they'd seen **empty shelves**. *(Galleria Retail Technology Solutions; phone: [011] 44-1270-824-444; www.galleria-rts.com)*

- More than half of Americans (53%) like to shop in **"pet-friendly"** stores (which allow pets inside). *(eBay Local; phone: 408-376-7400)*
- A third of Millenials (33%) think it's ok to switch or alter a **price tag** in order to get a discount, compared to 9% of Boomers. *(Yankelovich; phone: 212-896-8112)*
- 12% of Americans who watched the 2011 **Super Bowl** did so because they wanted to see the ads. *(Survey Sampling International; phone: 203-567-7230)*
- Four in 10 Americans have tried new retail stores, restaurants, or hotels because they'd received **gift cards** for them. Of these, 72% returned to that venue. *(Givex; phone: 877-478-7733)*
- Companies spent $56.13 per person in the U.S. on logoed **promotional products** in 2010. *(Advertising Specialty Institute; phone: 215-953-4000)*

sports & fitness

Professional football and the Olympics are the most widely followed sports; more than half of Americans are very or somewhat interested in each. Interest in specific sports differs by gender and race/ethnicity. Hispanics make up a disproportionate number of fans of professional boxing, while women make up the vast majority of gymnastics and figure skating fans. Overall, Blacks and Hispanics are more likely than Whites to be sports fans.

Sports offer an opportunity to socialize — whether as spectators or participants. Teens value the teamwork aspects of playing sports; most would rather be supporting members of a winning team than star players on a losing one. The majority of Americans have attended tailgate parties at football games.

About half of Americans participate in outdoor activities; fishing is most popular. Although three quarters of Americans claim that exercise is important in their daily lives, fewer than three in 10 exercise four or more days per week. Among those who exercise at least once a week, the vast majority do it for less than an hour at a time.

Exercising more and losing weight are Americans' top New Year's resolutions.

Football And Olympics Are Most Popular Sports In U.S.

More than half of Americans (53%) are "avid fans" (defined as being very interested) of one or more of the following sports: National Football League (NFL), Major League Baseball (MLB), National Basketball Association (NBA), National Hockey League (NHL), college football and/or basketball, NASCAR, and the Olympics, according to Scarborough Research.

Apart from these perennially popular sports, figure skating, gymnastics, pro boxing, and PGA Tour golf also draw considerable interest.

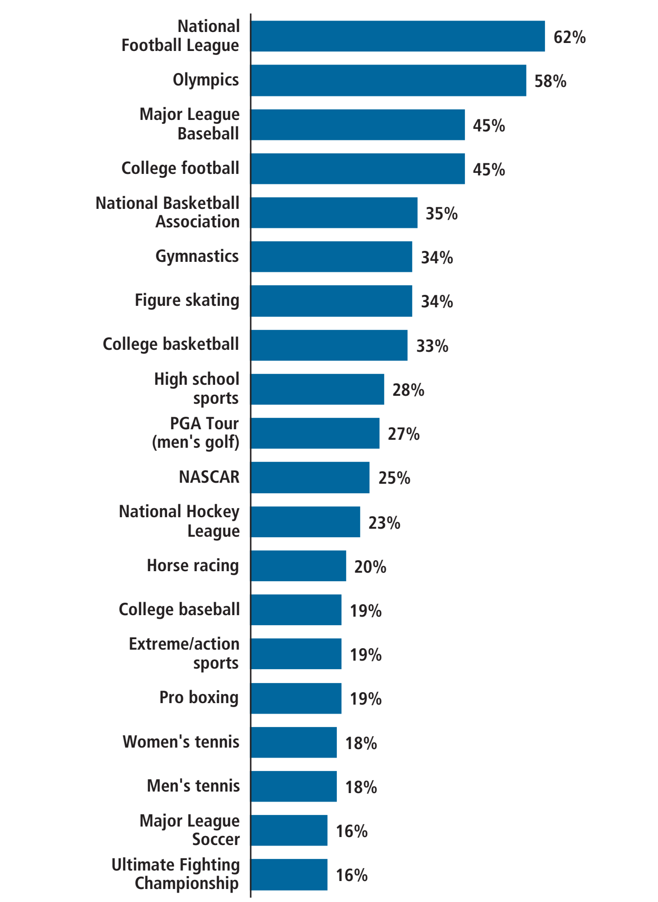
Gender Matters

Gymnastics and figure skating are much more popular with women than with men — 81% of avid figure skating fans and 73% of avid gymnastics fans are women.

Pro boxing is especially popular among Hispanics, who account for 35% of avid fans. Avid fans of pro boxing are more likely than adults overall to use smartphones to: watch free TV programs (110% more likely), check sports scores and updates (67%), and download and/or listen to music (58%).

MOST POPULAR SPORTS AMONG U.S. ADULTS 18 AND OLDER, 2011

(% who are very or somewhat interested)



SOURCE: Scarborough Research

Football Fans

More than seven in 10 U.S. men (71%) and 41% of women "follow" NFL football, according to a Harris Poll. Professional football has gradually been gaining a broader audience since 2006; 55% of Americans now watch, up from 48% in 2006. Residents of the western states (49%) are less likely than those in the East or Midwest (58% of each) to watch.

Blacks (72%) are significantly more likely than either Hispanics (51%) or Whites (54%) to follow the NFL. There are few differences in viewership by age, though 18-34-year-olds (52%) are slightly less likely than those ages 35-46 or 47-65 (57% of each) to watch.

AMERICANS' TOP 10 FAVORITE PROFESSIONAL FOOTBALL TEAMS, SEPTEMBER 2011

Dallas Cowboys
Pittsburgh Steelers
Green Bay Packers
New England Patriots
Chicago Bears
Indianapolis Colts
New York Giants
Washington Redskins
New York Jets

NOTE: Sample is adults who follow NFL football.

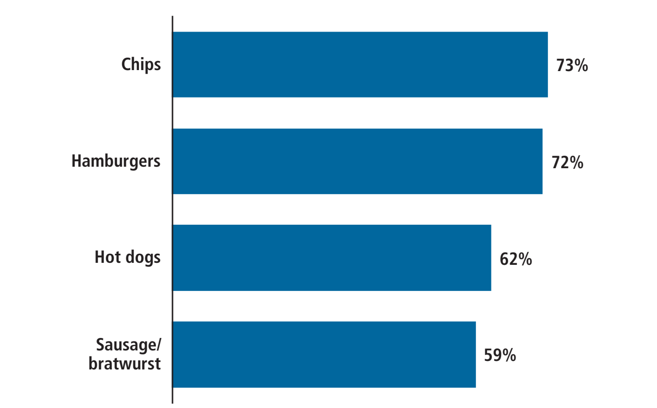
SOURCE: Harris Interactive

Sports As Social Events

More than six in 10 Americans (62%) have attended "tailgate" parties at high school, college, or professional football games, according to the Advertising Specialty Institute.

Nearly eight in 10 participants in tailgate or other football-related parties (79%) drink alcoholic beverages at the party. More than eight in 10 (83%) usually drink beer at foot-

FOODS EATEN AT FOOTBALL TAILGATE PARTIES



SOURCE: Advertising Specialty Institute ball parties; 27% drink liquor, and 17% drink wine. Almost four in 10 (38%) admit to having gotten drunk at football parties. More than seven in 10 (72%) have placed bets in football pools while at tailgate parties.

Two thirds (66%) have received free promotional football shirts with ads for sponsoring businesses as well as team logos on them. Six in 10 (62%) have bought logoed football t-shirts or polos, 52% have bought hats, and 44% have bought sweatshirts.

Women (20%) are almost twice as likely as men (11%) to have painted parts of their bodies as an expression of team spirit at football games.

SOURCES: Scarborough Research, Bill Nielsen, VP Scarborough Sports Marketing, 770 Broadway, New York, NY 10003; 646-654-8400; info@scarborough.com; www.scarborough.com. Price: Contact for information.

Harris Poll #105, October 2011, Harris Interactive, Regina Corso, SVP, Public Relations and Youth Research, 161 Sixth Ave., New York, NY 10013; 585-272-8400; info@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

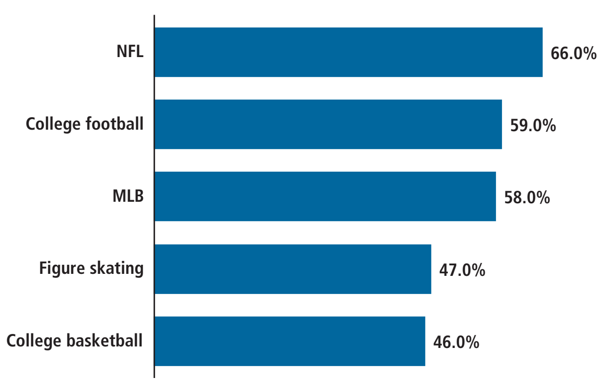
Advertising Specialty Institute, Larry Basinait, Executive Director of Research Services, Bucks County Technology Park, 4800 Street Rd., Trevose, PA 19053; 215-953-4000; lbasinait@asicentral.com; www.asicentral.com. Price: Selected data available online at no charge.

Hispanics And Blacks Are Big Sports Fans

Hispanics and Blacks are more likely than non-Hispanic Whites to be sports fans, according to ESPN. Four in 10 Blacks ages 12 and older (40%) are fans (ranking 8-10 on a 10-point scale of interest in sports), and 20% are avid fans (ranking 10). More than a third (35%) of Hispanics are fans, and 15% are avid, compared to 28% of Whites who are fans and 10% who are avid fans.

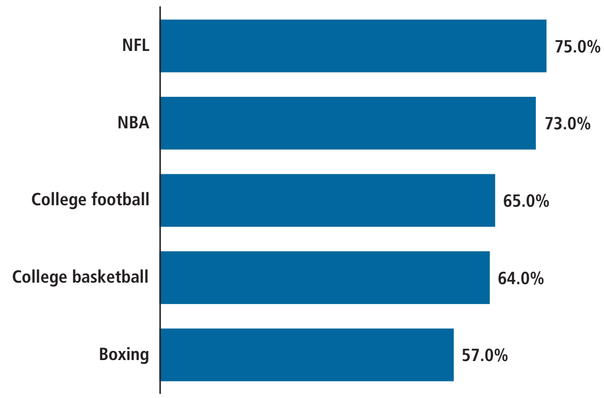
Blacks are slightly less likely than Whites or Hispanics to play in fantasy sports leagues (8%, compared with 9% each of Whites and Hispanics), but those who do play more frequently. Among adults who play in a given month, 71% of Blacks play two or more times per week, compared with 39% of Whites and 31% of Hispanics who play that often, according to MRI data cited by ESPN.

TOP 5 SPORTS AMONG NON-HISPANIC WHITES, BY TOTAL FAN BASE



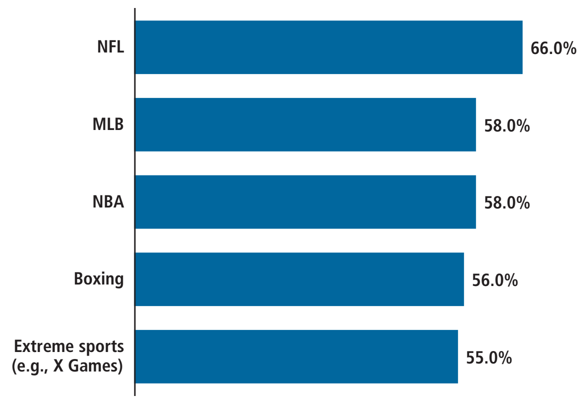
SOURCE: ESPN Sports Poll

TOP 5 SPORTS AMONG NON-HISPANIC BLACKS, BY TOTAL FAN BASE



SOURCE: ESPN Sports Poll

TOP 5 SPORTS AMONG HISPANICS, BY TOTAL FAN BASE



SOURCE: ESPN Sports Poll

Blacks and Hispanics follow wider varieties of sports than Whites do. Both Blacks and Hispanics follow an average of 12 sports, four of them avidly; Whites follow 11, three of them avidly.

Whites (32%) are more likely than Blacks (22%) or Hispanics (27%) to attend live sports events, according to MRI data cited. Among those who go to live events, 44% of Black attendees go regularly, compared to 32% of Hispanic attendees and 30% of White attendees.

Among Hispanics who speak primarily or solely English, NFL is the most popular sport, but among Spanish-speaking and bilingual Hispanics, soccer is most popular, according to Nielsen data cited.

ESPN's tracking of cross-platform consumption of its sports programming finds that Whites (29%) are more likely than Blacks or Hispanics (18% of each) to be daily users of ESPN.com. Whites (20%) and Hispanics (15%) are more likely than Blacks (7%) to listen to ESPN radio daily. Blacks (8%) are more likely than Whites (3%) or Hispanics (2%) to read ESPN magazine daily.

About one fifth of all the ESPN World Cup programming consumed by Hispanics (20%) and Blacks (19%) in 2010 occurred away from home. By comparison, 16% of Whites' consumption took place away from home. [SPORTS/FITNESS]

SOURCE: "Serving the Multicultural Sports Fan," presented by ESPN at Horowitz Multicultural Media Forum, March 16, 2011, Glenn Enoch, VP Integrated Media Research, 545 Middle St., Bristol, CT 06010; 860-766-2000; www.espn.com

Exercising Tops Americans' New Year Resolutions For 2011

About two thirds of American adults (68%) make new year's resolutions, according to Zogby. The older they are, the less likely they are to make resolutions (see chart).

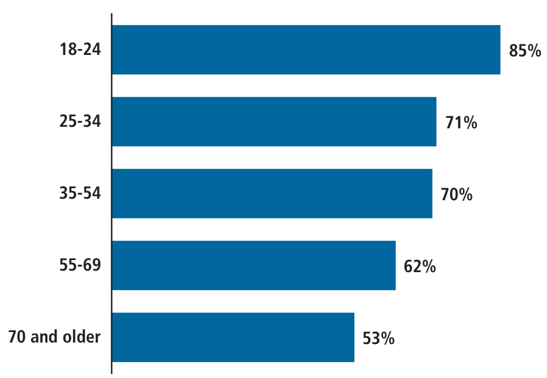
Of those who made resolutions for 2011, they most commonly plan to:

- Exercise more (41%);
- Lose weight (36%); and
- Save money (35%).

Exercising more is the most common resolution among all age groups, except for 25-34 year olds. Those aged 25-34 are more likely to resolve to save money (50%) than exercise (40%).

Saving money is the most common resolution among those with an annual household income of $35,000 to $50,000. Those with an annual household income of less than $25,000 are more likely to resolve to lose weight than save money.

AMERICANS WHO MADE NEW YEAR'S RESOLUTIONS FOR 2011, BY AGE



SOURCE: Zogby

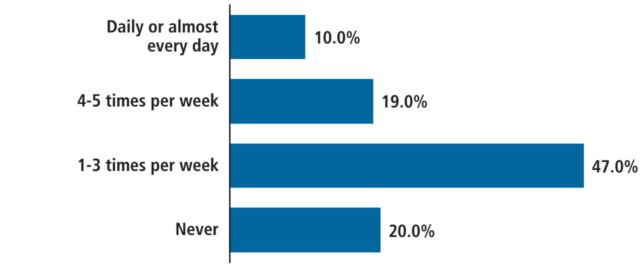
SOURCE: "New Year's Resolutions," Zogby, Stephanie DeVries, Managing Editor, 901 Broad St., Utica, NY 13501; 315-624-0200, x273; steph@zogby.com; www.zogby.com.

Americans Consider Exercise Important

Three quarters of U.S. adults consider exercise to be somewhat (42%) or very (33%) important in their daily lives, according to Rasmussen Reports.

Among those who exercise at least 1-3 times a week, 79% work out for 15 minutes to an hour. Only 9% exercise for longer than an hour, while 12% work out less than 15 minutes. Over a third of adults (35%) think they're overweight; 58% have dieted at some point in their lives.

HOW OFTEN U.S. ADULTS EXERCISE, 2011



SOURCE: Rasmussen Reports

SOURCE: Rasmussen Reports, John Troyan, Sales Manager, 625 Cookman Ave., #2, Asbury Park, NJ 07712; 732-481-5959; john.troyan@rasmussenreports.com; www.rasmussenreports.com. Price: Contact for information.

Fishing Is Most Popular Outdoor Activity

Nearly half of Americans over age five (49%) — 137.9 million individuals — participated in at least one outdoor activity in 2010, according to the Outdoor Foundation. Those ages 45 and older are less likely than those 25-44 to participate in outdoor activities (38% vs. 53%).

Fishing, running, and camping are the most popular outdoor activities. Adventure sports, including triathlons, backpacking, climbing, kayaking, rafting, and scuba diving, increased in popularity year-over-year.

Children and teens are more likely than adults to participate in outdoor activities. Participation rates stayed constant between 2009 and 2010 among children ages 6-12 (62% in 2010), teens ages 13-17 (61%), and adults ages 18-24 (56%). More than half of males ages 6-24 (53%) participated in at least one outdoor activity in 2010, down from 57% in 2009. Just under half (47%) of females the same age participated in 2010, up from 43% in 2009.

MOST POPULAR OUTDOOR ACTIVITIES AMONG ADULTS AGES 25 AND OLDER, 2010

	TOTAL PARTICPANTS
1. Fishing (fresh, salt, fly)	30.9 million
2. Running, jogging, trail running	30.0 million
3. Camping (car, backyard, RV)	25.0 million
4. Bicycling (road, mountain, BMX)	24.6 million
5. Hiking	22.8 million

SOURCE: Outdoor Foundation

OUTDOOR ACTIVITIES ADULTS AGES 25 AND OLDER DO MOST FREQUENTLY, 2010

	ANNUAL OUTINGS PER INDIVIDUAL
1. Running, jogging, trail running	86.1
2. Bicycling (road, mountain, BMX)	50.5
3. Birdwatching	42.0
4. Wildlife viewing	27.2
5. Fishing (fresh, salt, fly)	22.4

SOURCE: Outdoor Foundation

SOURCE: Outdoor Foundation, Christine Fanning, Executive Director, 1502 Sixth St., NW, Washington, DC 20001; 202-271-3252; cfanning@outdoorfoundation.org; www.outdoorfoundation.org.

Youth Outdoor Participation Jumps In Triathlons, Drops In Fishing

Running, biking, and camping were popular outdoor activities among those ages 6-24 in 2010, according to the Outdoor Foundation.

More than half of boys and young men ages 6-24 (53%) participated in at least one outdoor activity in 2010, down from 57% in 2009. Comparatively, 47% of girls and young women engaged in at least one outdoor activity in 2010, up from 43% in 2009.

While participation among White youth declined from 78% in 2009 to 71% in 2010, other racial and ethnic groups stay the same or increased slightly: Black youth outdoor participation grew from 8% in 2009 to 11% in 2010; Asian from 5% to 6%, and Hispanic from 7% to 9%.

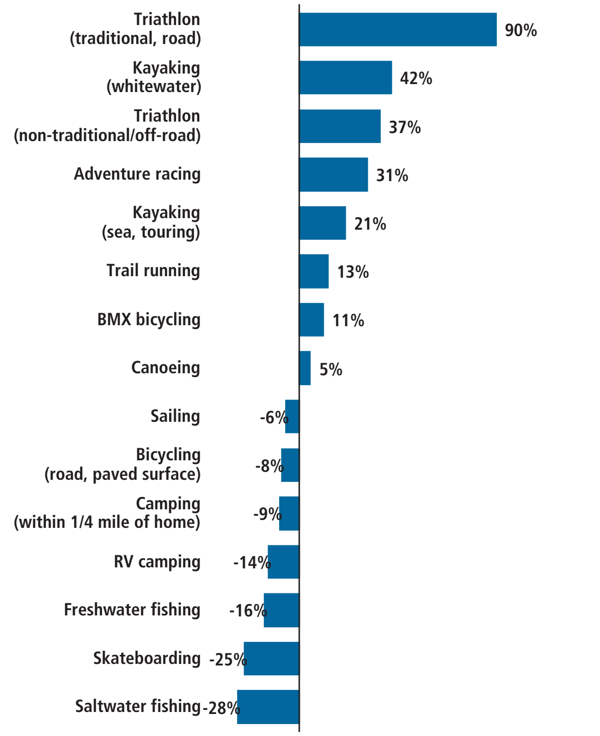
There's also a connection between income level and participation. While those from homes with annual incomes of at least $100,000 have the highest rates of outdoor participation (29%), the second highest level of participation comes from homes earning $25,000-$49,999 (22%). Youth from households with incomes of $75,000-$99,999 are least likely to participate in outdoor activities (13%).

Young people ages 6-24 participated in a total of 3.9 billion outdoor outings in 2010, with an average 82 outings per individual. Their top outdoor activities are mostly solitary: they jogged an average 89.4 times in 2010, bicycled 67.7 times, skateboarded 61.3 times, and birdwatched 32.4 times.

Youth participation in triathlons, kayaking, adventure racing, and trail running has increased significantly over the past three years, while car camping, sailing, and fishing are becoming less popular activities.

SOURCE: Outdoor Foundation, Christine Fanning, Executive Director, 1502 Sixth St., NW, Washington, DC 20001; 202-271-3252; cfanning@outdoorfoundation.org; www.outdoorfoundation.org.

TRENDS IN YOUTH OUTDOOR ACTIVITIES, PERCENTAGE CHANGE IN PARTICIPANTS FROM 2007 TO 2010



SOURCE: Outdoor Foundation

MOST POPULAR OUTDOOR ACTIVITIES FOR 6-24-YEAR-OLDS, BY PARTICIPATION RATE, 2010

	TOTAL U.S. PARTICIPANTS IN 2010
1. Running, jogging, trail running	20.4 million
2. Bicycling (Road, mountain, BMX)	17.8 million
3. Camping (car, backyard, RV)	15.0 million
4. Fishing (fresh, salt, fly)	14.5 million
5. Hiking	9.7 million

SOURCE: Outdoor Foundation

OUTDOOR ACTIVITIES 6-24-YEAR-OLDS DO MOST FREQUENTLY, ANNUAL AVERAGE PER INDIVIDUAL, 2010

	ANNUAL OUTINGS PER INDIVIDUAL
1. Running, jogging, trail running	89.4
2. Bicycling (road, mountain, BMX)	67.7
3. Skateboarding	61.3
4. Birdwatching	32.4
5. Surfing	21.9

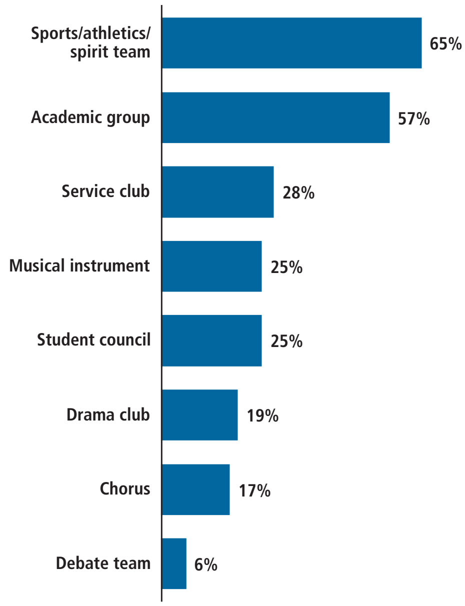
SOURCE: Outdoor Foundation

Sports Top Teen Girls' School Activities

More than nine in 10 teen girls (93%) participate in at least one activity at school, according to Varsity Brands and Ketchum Global Research Network. One in two feel they hold leadership positions and three in four feel people look to them as a leader.

Two in three teen girls (65%) participate in some type of athletics, most commonly soccer (33%), track and field (27%), tennis (25%), and basketball (25%). Four in five cite the "thrill of competition" as a key reason they play sports; 86% feel athletics allow them to make new friends.

TEEN GIRLS' SCHOOL-SPONSORED ACTIVITIES



SOURCES: Varsity Brands, Ketchum Global Research Network

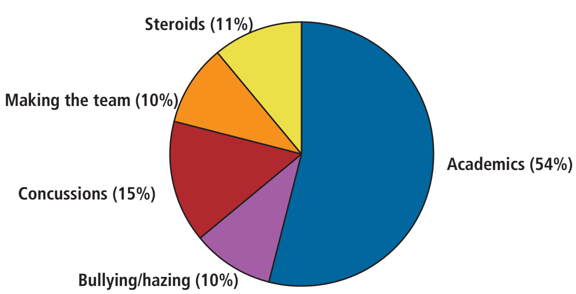
SOURCES: Ketchum Global Research Network, Joanne Puckett, EVP Global Research, 200 E. Randolph St., #3530, Chicago, IL 60601; 312-228-6886; Joanne.puckett@ketchum.com; www.ketchum.com.

Varsity Brands, Marlene Cota, VP Corporate Alliances, Business Development, 6745 Lenox Center Court, #300, Memphis, TN 38115; 901-387-4306; mcota@varsityspirit.com; www.varsity.com.

Teens: Athletes Need Mental Toughness, Drive More Than Talent

Teens overwhelmingly would prefer to be a supporting member of a winning team rather than be the best athlete on a losing team (72% vs. 28%), according to *ESPN Rise* magazine. They feel the most essential elements in being an elite athlete are mental toughness (46%), drive (40%), talent (12%), and good coaching (2%).

BIGGEST CHALLENGE FACING HIGH SCHOOL ATHLETES, ACCORDING TO TEENS, 2011



SOURCE: *ESPN Rise* magazine

SOURCE: *ESPN Rise* magazine, Jon Segal, Editorial Director, ESPN Plaza, Bristol, CN 06010; 860-766-2000; riseguy@espn.com; www.espnrise.com.

Football Is Most Dangerous Sport, Say Parents

Parents overwhelmingly feel football is the sport most likely to cause injury to children 5-14, according to non-profit Safe Kids USA. The number of young athletes who have sustained multiple injuries while playing team sports increased from 15% in 2000 to 21% in 2011. The most common injuries are sprains, muscle strains, bone or growth plate injuries, and heat-related illnesses.

Parents claim they are doing a good job of protecting their children from injury. They say their young athletes wear properly fitted equipment (88%), drink fluids regularly (85%), warm up before playing (76%), and are appropriately prepared for games as well as practices (73%). However, only 29% of parents feel coaches have the necessary skills to identify and prevent injuries, even though 57% say their coaches are certified in CPR, keep a first-aid kit on hand during play, and have a current copy of each player's medical history.

SPORTS WITH THE GREATEST RISK OF INJURY TO KIDS 5-14, ACCORDING TO PARENTS

Football	67%
Hockey	10%
Soccer	6%
Baseball/softball	5%

SOURCE: Safe Kids USA

SOURCE: Safe Kids USA, Kyle Johnson, 1301 Pennsylvania Ave., NW, #1000, Washington, DC 20004; 202-662-4463; www.safekids.org.

factoids

- ➤ Participation in **marathons** in the U.S. grew 203% between 2008 and 2010. *(Active Network; phone: 858-964-3813)*
- ➤ More than half of American workers (51%) participate in NCAA **college basketball betting** pools at work. *(OfficeMax; phone: 630-864-6066)*
- ➤ Young adults ages 18-29 increased their spending on **golf**-related items and activities 27% between 2007 and 2011. *(American Express Business Insights; phone: 212-640-5503).*
- ➤ Three in 10 visitors to **ski resorts** in 2010 (30%) were 17 years old or younger. *(National Ski Areas Association; phone: 303-987-1111)*

travel

Most Americans traveled for leisure in 2011; the majority expected to spend as much or more on leisure travel as they did in 2010. At the same time, however, travelers are looking to economize as much as possible. Getting a good deal on transportation and/or accommodation is the top factor in choice of weekend getaway destinations, and the majority of summer vacationers say they're having to cut back on everyday expenses to save up for their trips. Spending on economy lodgings is up, especially among affluent travelers.

The Internet is a key resource for both travel planning and purchasing, and mobile is growing. More than 15 million Americans are expected to book travel via mobile in 2012. More than nine in 10 owners of smartphones and/or tablets use them for travel planning, and the majority have booked travel on them or would consider doing so.

Consumer reviews of travel-related services and destinations are highly influential, and travel sites that include reviews enjoy higher growth in traffic than those that don't. Friends and family recommendations are the top source of information for family vacations, however.

Moms — especially Gen Y moms — are using social media to plan their vacations, to keep in touch while they're traveling, and/or to share their experiences.

Americans Return To The Skies: Most Will Travel More In 2011, And They Want A Deal When They Book

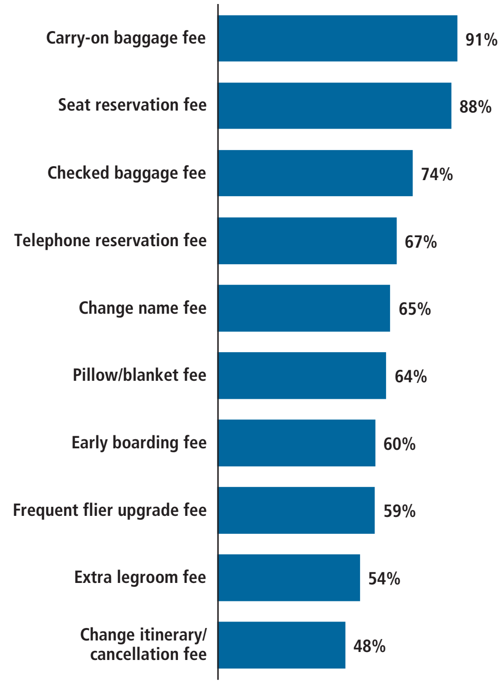
More than a third of travelers (36%) plan to spend more on leisure trips in 2011 than they did in 2010, and 42% plan to spend the same amount, according to TripAdvisor. Nine in 10 (90%) will take two or more leisure trips in 2011, on par with the 89% who did so in 2010.

Three quarters (75%) will travel to a domestic destination in the coming year, with the most popular cities being Las Vegas, New York, and San Francisco. Nearly seven in 10 (69%) will travel internationally, with 52% of those planning to visit Europe, 13% Asia, and 12% South America.

Deals were the best aspect of traveling in 2010, with 39% of travelers saying they enjoyed finding online travel deals and 22% taking advantage of cheaper hotel rates. Fees for carry-on baggage, cited by 69% of travelers, were by far perceived as the most onerous development.

Nearly 24% of travelers expect to fly more often in 2011 than they did in 2010, and 60% expect to fly the same amount. More than three quarters (77%) expect to pay fees for in-flight extras such as beverages or food. Despite their dislike of additional airline fees, 27% would pay extra to sit in a child-free section of a plane, and 19% would pay extra to sit in a quiet section.

AIRLINE FEES THAT TRAVELERS FIND 'VERY ANNOYING,' 2010



SOURCE: Consumer Travel Alliance

Travelers' deal-seeking behavior has made them much less loyal to hotel brands; 39% say they will be faithful to one brand in 2011, down from 59% in 2010. The brands they are most loyal to are:

- Marriott (24%);
- Hilton (18%); and
- Hampton Inn (7%).

While many of the "usual suspects" top the list of activities travelers plan to do while on vacation — such as visiting a historic site or a museum — the activities they have never done but are most interested in trying are a cruise (11%) and taking an educational course (11%).

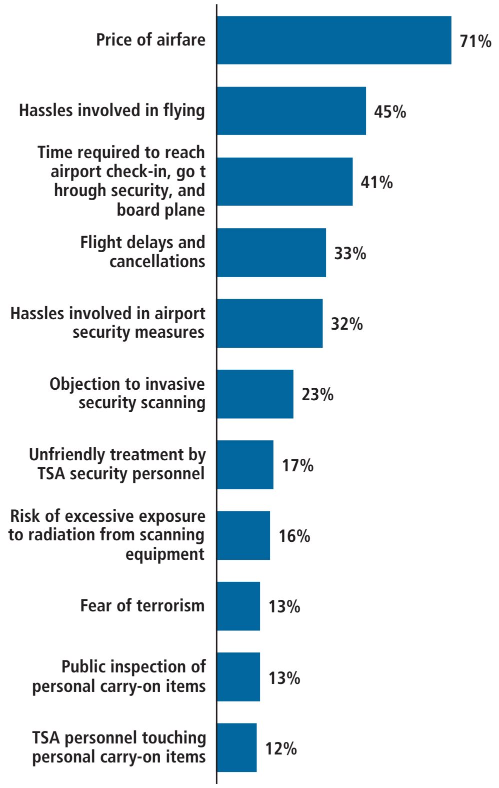
The vast majority of travelers (69%) connect with work while on vacation; 62% check work email, and 13% call the office to check in. One in six (16%) say their work often affects their vacation plans. Only 8% consider planning remote vacations to avoid checking in with work.

Nine in 10 travelers (90%) check in with home while away. Nearly three quarters (74%) check in via email, 40% via text, and 28% via social media.

Cutting Back On Travel

Some 28% of leisure travelers reported taking fewer trips in 2010 than they did in 2008, according to the U.S. Travel Association. Cost is the most common reason, but a substantial proportion cites travel hassles. Those aged 55 and older (51%) are more likely than those under age 55 (41%) to say hassles are a reason they do not fly as much.

REASONS LEISURE TRAVELERS TOOK FEWER TRIPS IN 2010 THAN IN 2008



SOURCE: U.S. Travel Association

Nearly half of travelers (49%) would fly more often if they would encounter fewer hassles in the process. The vast majority (75%) believe there is a better way to provide air travel security than the procedures in place in 2010.

Flying Fees

Although many add-on fees for air travel have been in place for a while, 66% of travelers are still surprised by a fee at least some of the times they fly. More than a quarter (26%) say such fees place a "great deal" of strain on the budget for their trip, and only 19% say fees do not affect their travel budget at all.

Nearly all travelers (99%) believe airlines should be forced to disclose all of their fees on every website that sells tickets.

SOURCES: "2011 Travel Forecast," TripAdvisor, Amelie Hurst, 41 Needham St., Newton, MA 02464; 415-829-8158; ahurst@tripadvisor.com; www.tripadvisor.com. Price: Available upon request at no charge.

"A Study of Air Traveler Perceptions Of Aviation Security Screening Procedures," U.S. Travel Association, Cathy Keefe, 1100 New York Ave. NW, #450, Washington, DC 20005; 202-408-2183; ckeefe@ustravel.org; www.ustravel.org. Price: Available online at no charge.

"The Annoying Fee Survey," Consumer Travel Alliance, Charlie Leocha, Director, 7062 Solomon Seal Ct., Springfield, VA 33152; 202-713-9596; leocha@consumertravelalliance.org; www.consumertravelalliance.org. Price: Available upon request at no charge.

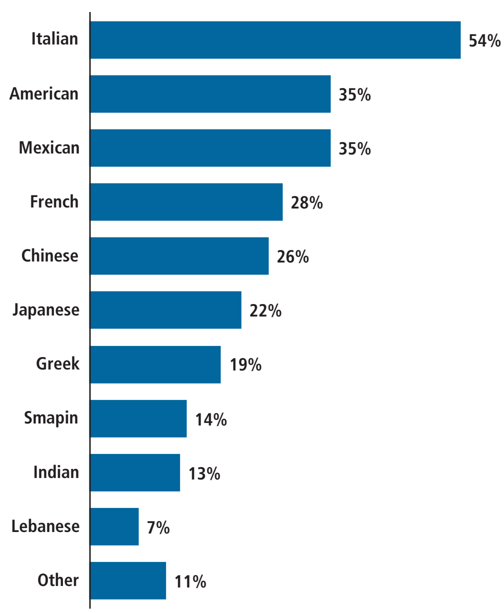
When In Rome... Travelers Try Local Cuisines

A majority of travelers make it a point to try the local cuisine when on vacation, including 29% who chose their destination specifically based on the cuisine, according to Hotels.com. At the other end of the spectrum is the 13% of travelers who are not willing to try any local cuisine and 18% who prefer to eat at an American fast food chain instead of a local restaurant.

Four in 10 travelers (40%) take advantage of the breakfast meal plan offered by their hotels — which is often included in the price of the room — and 7% choose an all-inclusive meal plan offered by the hotel. Some 36% of travelers choose to seek out local markets and restaurants rather than eat meals at their hotels.

SOURCE: "What Travelers Prefer To Eat On Vacation," Hotels.com, Taylor Cole, Director of PR & Social Media, 10440 North Central Expy., #400, Dallas, TX 75231; 469-335-8442; taycole@hotels.com; www.hotels.com.

CUISINES AMERICAN TRAVELERS PREFER TO EAT WHEN ON VACATION, 2010



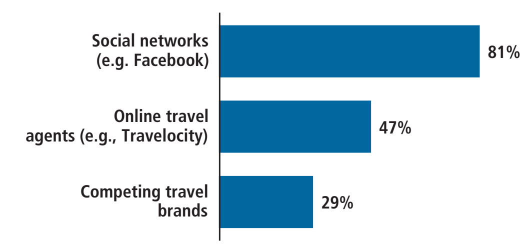
SOURCE: Hotels.com

Airlines Lead Travel Industry Online

Nearly half of all airline tickets are booked online, according to a study by ISM, the L2 Think Tank for Digital Innovation, and George Washington University. The study rates various brands and sectors within the travel industry, assigning them "digital IQ" scores based on the effectiveness of their websites, digital marketing, social media, and mobile efforts.

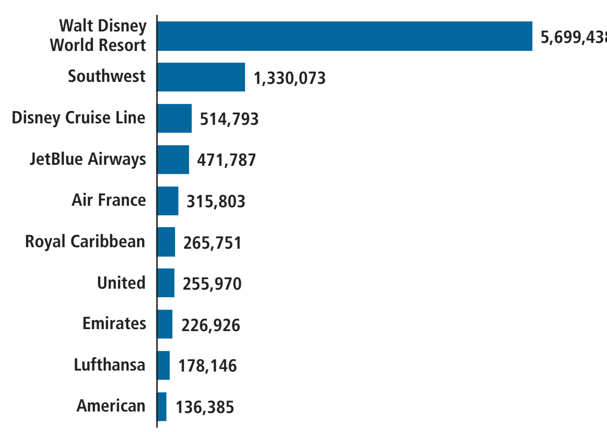
Digital IQ translates into online sales — airlines, with an average digital IQ of 113, sell 48% of their tickets online,

SITES THAT DRIVE MOST TRAFFIC TO TRAVEL BRAND WEBSITES
(% of travel brand websites that receive traffic from sites)



SOURCES: L2, ISM, George Washington University

TRAVEL BRANDS WITH THE MOST FACEBOOK "LIKES," MARCH 2011



SOURCES: L2, ISM, George Washington University while cruise lines, with an average digital IQ of 86, sell only 9% of tickets online. Hotels are in between, with an average digital IQ of 97 and 30% of rooms booked online.

Consumers who are shopping for travel online visit an average of 20 or more sites, with social networks accounting for an increasing share of referrals to travel brand sites. Consumers are receptive to email; 63% of those who receive email from travel companies are more likely to purchase services from those brands.

Two thirds of travel shoppers are influenced by consumer travel reviews, but only 9% of travel brands include user reviews on their sites. Traffic to brand sites that include reviews grew 24% between March 2010 and March 2011, compared to 7% growth for sites without reviews.

Mobile is a growth area for travel purchases; 15.1 million consumers are expected to book travel via mobile in 2012.

Moms Plan Vacations Online

More than half of moms (54%) use social media to either plan family vacations or share their travel experiences, finds Bohan Advertising. About a third (32%) use social media during the planning stages; 21% use it during their vacations, and 29% use it afterwards to post photos or share experiences. Gen Y moms (73%) are much more likely than Gen X (53%) or Boomer (37%) moms to use social media relative to family vacations.

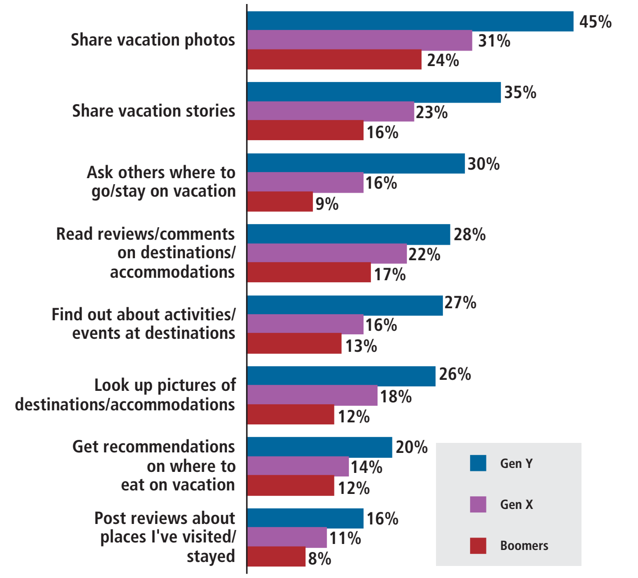
Moms' use of the Internet for travel planning is shifting from research to purchase. The proportion of moms who use the Internet more for learning about destinations or accommodations than they used to dropped from 52% in 2010 to 38% in 2011. At the same time, the proportion who use it more for booking travel services grew from 30% to 35%.

When seeking travel information and advice online, moms trust user reviews on sites such as Trip Advisor the most (43%), followed by opinions posted on Facebook (20%) and blogs (17%). Gen Y moms are more likely than older moms to trust information on Facebook (30% of Gen Y vs. 17% of Gen X and 16% of Boomers). They're also more inclined to trust smartphone travel apps (23% of Gen Y vs. 14% of Gen X and 8% of Boomers). [Travel/Tourism, Family, Online]

SOURCES: "Digital IQ Index: Travel, April 26, 2011," L2, Maureen Mullen, Research & Advisory Group, 821 Broadway, 2nd Fl., New York, NY 10003; 212-388-1355; maureen@L2thinktank.com; www.L2thinktank.com. Price: Available online at no charge. Also, ISM, Melissa Dowler, CMO, 745 Boylston St., 7th Fl., Boston, MA 02116; 617-353-1822; mdowler@ismboston.com; www.ismtravels.com. George Washington University, Stuart Levy, Assistant Professor, Department of Tourism and Hospitality Management, 2201 G St., NW, Funger Hall, #301, Washington, DC 20052; 202-994-1706; slevy@gwu.edu; www.gwu.edu.

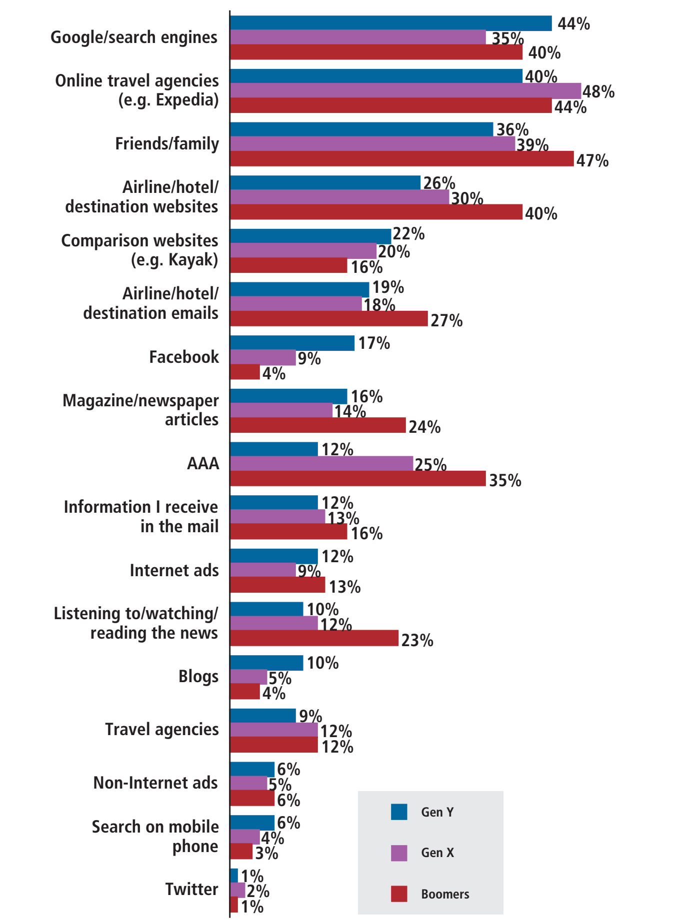
"2011 Family Travel Survey," WhyMomsRule.com, div. of Bohan Advertising, John Sharpe, CMO, 124 12th Ave. So., Nashville, TN 37203; 615-327-1189; jsharpe@bohanideas.com; www.bohanideas.com; www.whymomsrule.com. Price: Available online at no charge.

HOW MOMS USE SOCIAL MEDIA FOR FAMILY VACATIONS, BY GENERATION



SOURCE: Bohan Advertising

WHERE MOMS LOOK FOR TRAVEL DEALS ONLINE



SOURCE: Bohan Advertising

Travelers Say Airfares, Plane Interiors Are Least Satisfactory Aspects Of Flying

U.S. travelers who have flown commercial airlines in the past six months are most likely to be satisfied with the ease of ticket-buying and least likely to be satisfied with airfares and the comfort of the plane, according to MarketTools.

The majority of flights (73%) were taken for personal trips; 13% were for business trips and 14% were for a combination of business and leisure.

Three quarters of travelers (76%) who have flown in the past six months took one or two trips. Fewer than one in 10 (9%) have taken five or more trips.

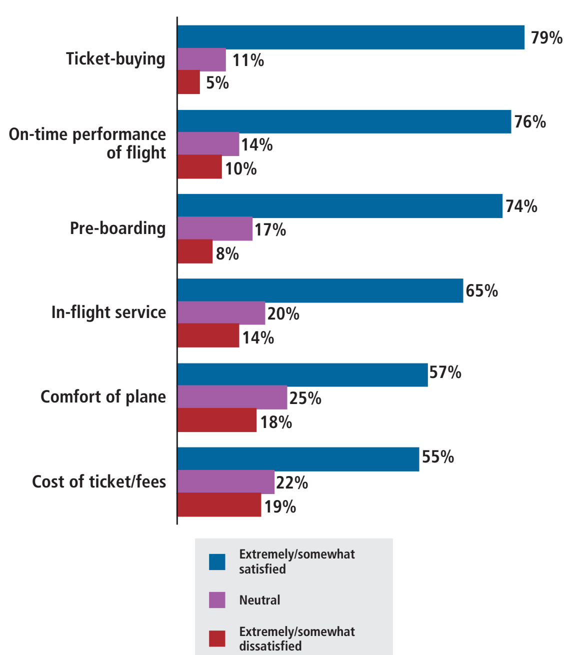
Most Buy Tickets Online

Almost eight in 10 airline tickets are purchased online; 57% from airlines' websites and 22% from travel booking sites such as Orbitz or Expedia. While 79% of travelers were extremely (45%) or somewhat (34%) satisfied with their most recent ticket-buying experiences, only 55% were satisfied (20% extremely and 35% somewhat) with the prices they paid.

Consumers are most satisfied with the customer service at Southwest Airlines — 34% cite it as best — more than twice as many as any other airline. The next most popular is Delta, cited by 14%. When asked which airline they used for their most recent trip, 24% said they flew Delta, and 19% flew Southwest.

One in 10 travelers in the study have posted complaints about their air travel experiences on social media networks.

SATISFACTION WITH VARIOUS ASPECTS OF AIR TRAVEL



SOURCE: MarketTools

Passenger Satisfaction Declining

Overall passenger satisfaction with airlines declined 1.5% between 2010 and 2011, according to the American Customer Satisfaction Index. Satisfaction with airlines has dropped 10% since 1995, from 69 to 65 on a 100-point scale.

Southwest scores highest in 2011, at 81, while Delta scores lowest among the major airlines measured, at 56%, a 10% drop from the previous year.

New baggage fees may be partly to blame for declining satisfaction with the industry; passengers who pay to check their bags are less likely to be satisfied with air travel than those who don't (58 vs. 68).

When asked what they find most irritating about fellow airplane passengers, travelers are most likely to complain about sitting next to someone with strong body odor (64%), according to DDB.

Respondents were asked to choose from a list that included a crying baby (23%), a passenger who talks incessantly about boring subjects (8%), and an obese person (6%). Adults with young children at home are more likely than others to be tolerant of crying babies.

SOURCES: "Satisfaction With U.S. Airline Carriers," May 2011, MarketTools, Justin Schuster, VP Enterprise Products, 150 Spear St., San Francisco, CA 94105; 415-957-2200; info@markettools.com; www.markettools.com. Price: Contact for information.

American Customer Satisfaction Index, June 2011, Claes Fornell, Founder, 625 Avis Dr., Ann Arbor, MI 48108; 734-913-0788; info@theacsi.org; www.theacsi.org. Price: Available online at no charge.

"DDB Life Style Study," DDB, James Lou, U.S. Chief Strategist, 200 E. Randolph, Chicago, IL 60601; phone: 312-552-6000; james.lou@ddb.com; also, Mia Sissac; 313-552-6439; www.ddb.com. Price: Contact for information.

New York Is Most-Visited U.S. City

New York City received the most visits from overseas travelers of any U.S. city in 2010, according to the U.S. Department of Commerce. Los Angeles (33%), Seattle (33%), and Las Vegas (31%) had the highest growth in number of foreign visitors between 2009 and 2010, while Tampa/St. Petersburg, Florida experienced a 15% decline.

The Mid-Atlantic states receive the largest proportion of foreign visitors (36% of all visitors to the U.S.), followed by the South Atlantic.

TOP 5 U.S. CITIES FOR FOREIGN VISITORS, MAY 2011

CITY	NUMBER OF VISITORS IN 2010	GROWTH 2009-2010
New York City	8,462,000	9%
Los Angeles	3,348,000	33%
Miami	3,111,000	17%
Orlando	2,715,000	13%
San Francisco	2,636,000	18%

SOURCE: U.S. Department of Commerce

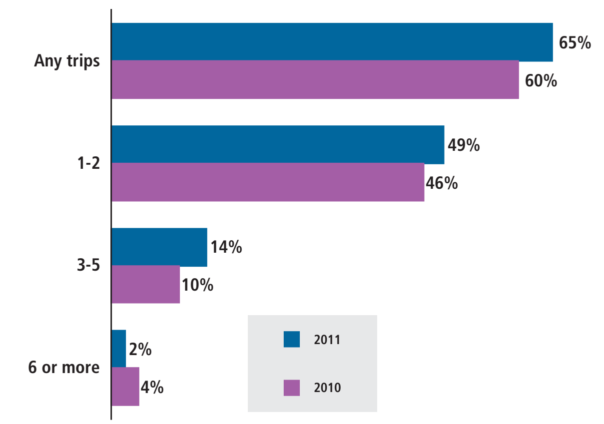
SOURCE: "Overseas Visitation to U.S. States, Cities, and Census Regions (2010)," May 2011, U.S. Department of Commerce, International Trade Administration, Office of Travel and Tourism Industries, 1401 Constitution Ave., NW, Washington, DC 20230; 202-482-0140; otti@trade.gov; http://tinet.ita.doc.gov. Price: Available online at no charge.

Gays And Lesbians Planning More Summer Trips Than Last Year

More gay and lesbian Americans are planning to travel for leisure this summer than did last summer (65% in 2011 vs. 60% in 2010), according to Witeck-Combs Communications. Those who are planning to travel for leisure or business during the summer expect to spend an average of $1,300, up from $1,058 in 2010.

The majority of lesbian and gay adults plan to take more (9%) or the same number (63%) of leisure trips this year as they did last year. Six in 10 (60%) will take the same number of weekend getaways as they did in 2010, while 12% plan to take more.

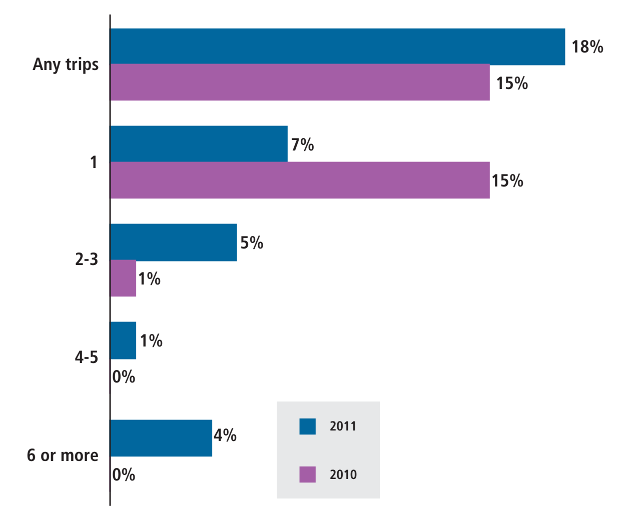
SUMMER LEISURE TRIPS PLANNED BY U.S. GAY/LESBIAN ADULTS, 2011 VS. 2010



NOTE: 2010 categories were 1-2 trips, 3-4 trips, and 5 or more trips.

SOURCE: Witeck-Combs Communications

SUMMER BUSINESS TRIPS PLANNED BY U.S. GAY/LESBIAN ADULTS, 2011 VS. 2010



NOTE: 2010 categories were 1-2 trips, 3-4 trips, and 5 or more trips.

SOURCE: Witeck-Combs Communications

Three quarters say their leisure trips will be the same length (73%) or longer (2%) than they were last year. Rising gas prices and other economic concerns aren't deterring the majority of gay and lesbian travelers. When asked how the economy will affect their leisure travel plans, 63% say they plan to take the same number of leisure trips by car as last year, while another 9% plan to take more car trips than last year.

SOURCE: Witeck-Combs Communications, Bob Witeck, CEO, 2120 L St., NW, #850, Washington, DC 20037; 202-887-0500, x19; info@witeckcombs.com; www.witeckcombs.com. Price: Contact for information.

Vacation Travel Is Up, Especially With Family

More Americans are planning to take family vacations this summer than last year; seven in 10 travelers planning summer trips will be bringing their families, up from 45% in 2010, according to American Express. Getaways with friends (women-only or men-only) are also on the rise; 15% expect to take such trips this year, up from 10% in 2010.

Nearly six in 10 Americans (59%) are planning summer vacation travel, up from 51% in 2010. On average, travelers plan to take two one-week trips and three weekend trips over the summer, spending $1,200 per person on week-long vacations, and $300 per person for weekend getaways.

Four in 10 cite being able to get good deals on hotels, flights, and other services as the strongest factor in choosing weekend getaway destinations. Other considerations include plans of friends, family, or significant others (32%); variety of activities (31%); and proximity to a beach (29%).

Six in 10 Americans planning summer vacation trips are cutting back on everyday expenditures, including dining out (38%), buying clothes (30%), home improvement (25%), entertaining friends (24%), spa or salon services (20%), and buying gadgets/tech items (18%). Although high gas prices continue to be a concern, 38% are choosing to drive instead of fly in order to save money. A quarter (24%) plan to save money by choosing affordable destinations.

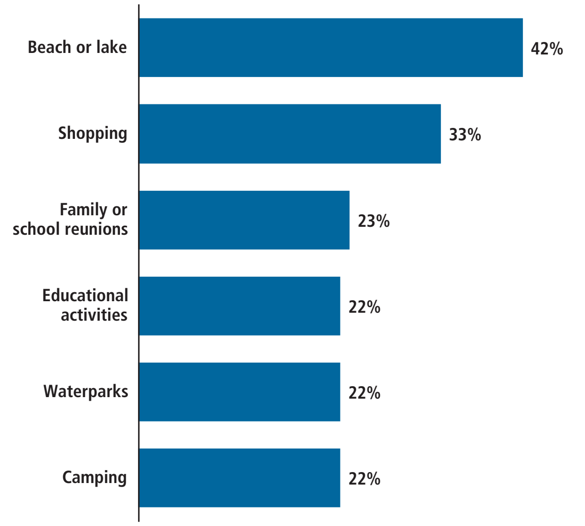
More than four in 10 Americans (45%) would choose perfect weather all summer over free gas (29% would choose

TOP 10 SUMMER VACATION DESTINATIONS IN U.S., 2011

Florida
California
New York
North Carolina
Texas
Nevada
South Carolina
Wisconsin
Illinois
Massachusetts

SOURCE: American Express

AMERICANS' FAVORITE VACATION ACTIVITIES



SOURCE: American Express

the gas), according to Hilton Worldwide. Six in 10 would rather drive alone for 10 hours with no stereo than sit on a 10-hour flight with crying children. Just under half (49%) would rather leave their high-tech devices at home for a month-long vacation than vacation for a week without other people around.

SOURCES: "American Express Spending & Saving Tracker," May 2011, American Express, Marisa Schneer, 200 Vesey St., New York, NY 10285; 212-640-2228; marisa.s.schneer@aexp.com; www.americanexpress.com. Price: Contact for information.

Hilton Worldwide, Scott Carman, Director, Customer Marketing Communications, 7930 Jones Branch Dr., #1100, McLean, VA 22102; 703-883-5803; scott.carman@hilton.com; www.hiltonworldwide.com. Price: Contact for information.

Family Travelers Eye Hawaii, National Parks As Next Destination

Four in 10 U.S. leisure travelers (44%) took at least one vacation that included children in 2010 according to Meredith Travel Marketing and Ypartnership. Two in three grandparents (67%) traveled with a grandchild. Family travelers, on average, spent $4,000 on leisure travel last year.

Children are more influential in some aspects of family travel than in others — primarily deciding what the family does for fun (62%), during the initial planning decisions (48%), and planning when and where to dine out (46%).

Nearly nine in 10 family travelers (87%) use the Internet to make a reservation and 23% visit a blog to learn more information about a destination or travel service supplier.

Family travelers are most interested in visiting the Hawaiian Neighbor Islands (73%), national parks (71%), Honolulu (69%), and Orlando (59%) during the next two years. Two in three families (64%) want to take a cruise during the next two years. Internationally, family travelers express the most desire to visit the Caribbean (31%), Europe (30%), and Mexico (21%) during the next two years.

WHERE FAMILY TRAVELERS TURN FOR INFORMATION PLANNING FAMILY VACATIONS

Family member/friend	82%
Travel guidebook	57%
Online travel agency	57%
Reviews posted on sites like TripAdvisor	55%

SOURCE: Meredith, Ypartnership

SOURCES: Meredith Travel Marketing, Patrick Taylor, 125 Park Ave., New York, NY 10017; 212-551-6984; patrick.taylor@meredith.com; www.meredith.com.

Ypartnership, Amanda Jackson, 423 S. Keller Rd., #100, Orlando, FL 32810; 407-838-1812; amanda.jackson@ypartnership.com; www.ypartnership.com.

Consumers Shift Travel And Leisure Spending To Less-Expensive Options

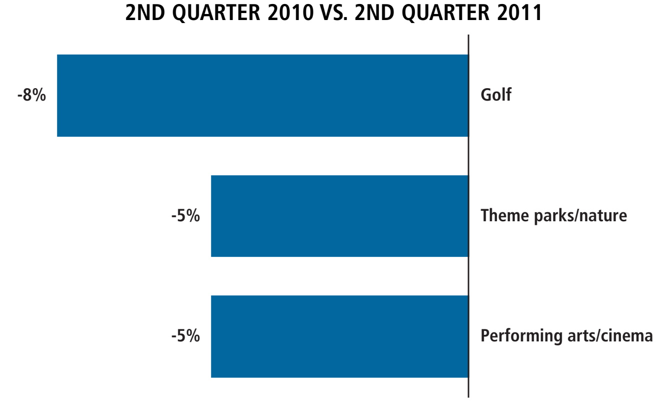
Consumers are shifting their spending habits in travel, entertainment, and dining toward less-expensive options, according to American Express Business Insights.

Travelers in the U.S. spent 26% more on economy lodging in the 2nd quarter of 2011 than in the 2nd quarter of 2010. Spending on economical hotels/motels increased most among affluent consumers (up 52%), who also increased their spending slightly on luxury accommodations (3%).

Consumers and business travelers bought 4% fewer airline tickets in 2nd quarter 2011 than they had in 2010, but spent 5% more per ticket, resulting in a 1% increase in total spending on airfares for the quarter.

Consumers overall spent 5% more on economy airfares than they had in 2010, while affluent consumers spent 2% less on economy tickets. Consumers spent 3% less on car rentals in 2nd quarter 2011 than they did in the same period in 2010. They also decreased spending on cruises by 1%.

DECLINES IN CONSUMER SPENDING IN ENTERTAINMENT/LEISURE, 2ND QUARTER 2010 VS. 2ND QUARTER 2011



SOURCE: American Express Business Insights

Spending on meals at quick-service restaurants (QSR) grew 4% between second-quarter 2010 and the same period in 2011, while spending at casual restaurants decreased 3% and that at fine dining establishments decreased 1%. Consumers are still eating out; they're just choosing less-expensive places: the number of dining occasions per consumer grew 3%.

Spending on entertainment/leisure activities declined across the three categories measured. Affluent consumers increased their spending on theme parks and natural attractions by 4%, but decreased in all other categories.

SOURCE: "Q2 2011 Spend Sights Report Travel: U.S. Airline, Car Rental, Cruise, and Lodging Categories," American Express Business Insights, Christa Degnan Manning, Director, Expert Insights Research, Advisory Services, American Express Global Business Travel, 200 Vesey St., New York, NY 10285; 212-640-5130; also, Tracy Pauroski, Director, Public Affairs & Communication, Global Travel Services; 212-640-8409; tracy.j.pauroski@aexp.com; www.americanexpress.com

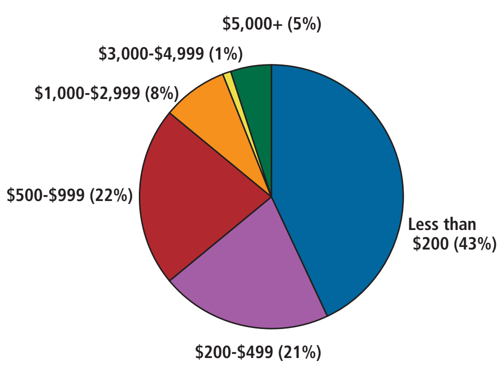
Mobile Devices Are Travel Resources, From Research And Planning To Sightseeing And Dining

Mobile devices are becoming indispensable travel partners — both for planning before the trip and getting information on the go. More than nine in 10 users of touch-screen smartphones (94%) or iPads (91%) use these devices for travel planning, according to Greystripe. More than two thirds of iPad owners (67%) and 55% of touch-screen smartphone owners travel two or more times per year.

The majority of smartphone (60%) and iPad owners (69%) who travel twice a year or more use mobile websites for travel planning activities such as researching local attractions and making reservations; half use mobile apps for these activities (52% and 50%).

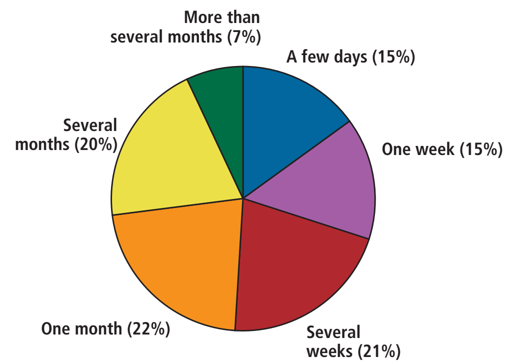
Seven in 10 (73% of iPad users and 70% of smartphone users) agree strongly or somewhat that mobile devices are useful tools for researching, planning, and booking travel.

MAXIMUM CONSUMERS ARE COMFORTABLE SPENDING ON TRAVEL PURCHASE VIA MOBILE



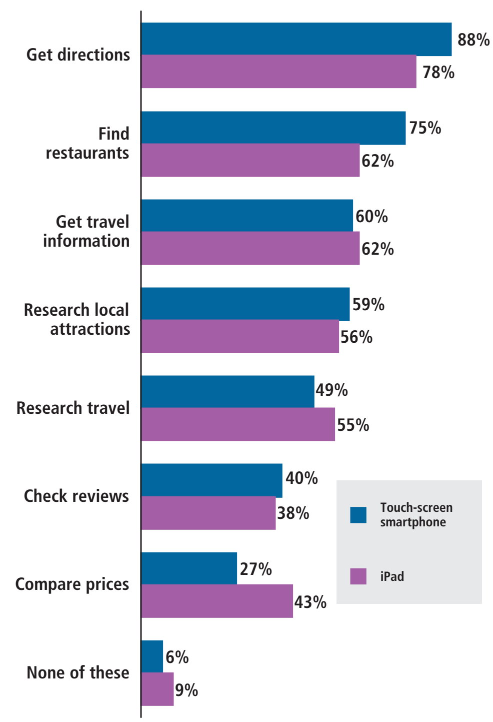
SOURCES: Mojiva and Insight Express

HOW FAR IN ADVANCE MOBILE USERS PLAN TRAVEL



SOURCES: Mojiva and Insight Express

TRAVEL-RELATED ACTIVITIES FOR WHICH SMARTPHONE AND TABLET OWNERS USE THEIR DEVICES



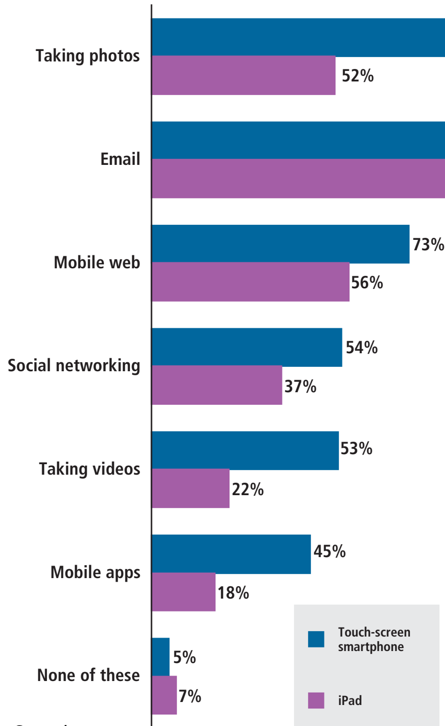
NOTE: Sample is mobile users who travel twice or more per year.

SOURCE: Greystripe

Six in 10 iPad users (60%) and 49% of smartphone users who travel twice or more per year have booked travel using their mobile devices. Mobile users cite online search, price, and recommendations as the strongest influences in their travel decisions. Smartphone users are somewhat more likely than iPad users to say they make travel choices based on the availability of discounts, coupons, or promotions.

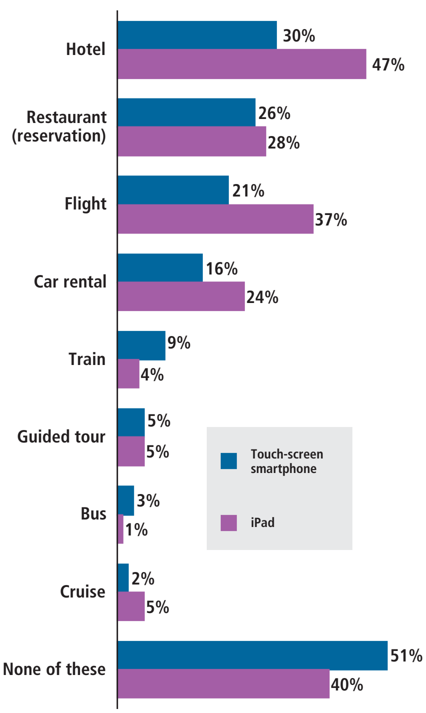
Smartphones see wider use than iPads do during travel for all activities except email — no doubt smartphones' portability plays a role.

HOW CONSUMERS USE THEIR MOBILE DEVICES WHILE TRAVELING



SOURCE: Greystripe

TRAVEL SERVICES CONSUMERS HAVE BOOKED VIA MOBILE DEVICES



SOURCE: Greystripe

The majority of mobile consumers (73%) make travel arrangements one month or less in advance of their trips, according to an Insight Express study for Mojiva. Almost eight in 10 mobile users (79%) typically travel in summer; 36% travel in spring, 32% in fall, and 27% in winter.

Six in 10 mobile users (61%) say they'd consider booking travel services via mobile devices. Of those who say they'd buy travel services via mobile, 42% would book hotels, 31% would book flights, 28% would buy vacation packages, 27% would rent cars, 21% would buy cruises, and 14% would purchase guided tours. For the most part, consumers who are willing to purchase travel services via mobile prefer to buy only services costing $500 or less on the devices.

SOURCES: "Smartphone and Tablet Travel Insights," September 2011, Greystripe, Kevin Granath, VP of Sales, 33 Bryant St., #LL120, San Francisco, CA 94107; 415-651-2650; sales@greystripe.com; www.greystripe.com. Price: Available online at no charge.

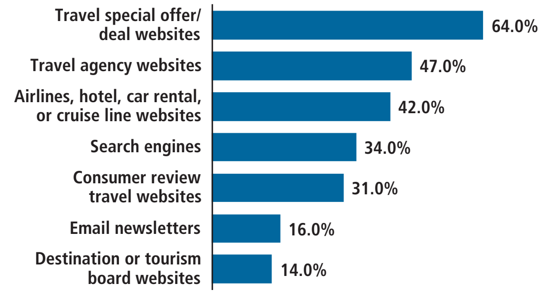
"Mojiva Mobile Audience Guide, Travel 2011," Mojiva, Amy Vale, Marketing Manager, 136 Baxter St., New York, NY; 646-862-6201; avale@mojiva.com; www.mojiva.com. Price: Available online at no charge.

Insight Express, Joy Liuzzo, Senior Director, Mobile Research, 333 Ludlow St., South Tower, 2nd Fl., Stamford, CT 06902; 203-359-4174; info@insightexpress.com; www.insightexpress.com

factoids

- One in five smartphone owners (20%) have downloaded a **travel app** to their device. *(Ypartnership; phone: 407-838-1812)*
- Between January and November 2010, 55 million people from other countries **visited the U.S.** *(U.S. Department of Commerce Office of Travel and Tourism Industries; phone: 202-482-0140)*
- Almost half of Americans (48%) vow to use other means of travel because of new security measures at U.S. **airports**, including full body scans and pat downs. *(Ibope Zogby International; phone: 315-624-0200)*
- Americans spent $94.5 billion on travel and tourism **abroad** in 2010. *(U.S. Department of Commerce, Office of Travel and Tourism Industries; phone: 202-482-0140)*
- **Airplane passengers** will talk to the person sitting next to them for an average of five minutes before trying to end the conversation. *(*Men's Health*; phone: 610-967-5171)*
- One fifth of U.S. adults (20%) say they won't be taking a **summer vacation** in 2011. *(AdGenesis; phone: 646-350-4418)*
- Hilton Hotels ranked highest in customer satisfaction among U.S. **hotel** chains as of June 2011. *(American Customer Satisfaction Index; phone: 734-913-0788)*
- Italy is Americans' top choice for international **vacation destinations** (if money were no object). *(Harris Interactive; phone: 585-272-8400)*
- A third of Americans (33%) do not plan to take **vacations** in 2011. *(BIGresearch; phone: 614-846-0146)*
- More than half of working Americans (57%) don't use up all their allotted **vacation time** at the end of the year, leaving an average of 11 days unused. *(JetBlue Airways; phone: 718-709-3089)*
- If given the opportunity to **vacation** anywhere outside of the U.S., 19% of Americans would choose a destination in the Asia/Pacific region. *(Harris Interactive; phone: 212-539-9600)*

AMERICANS' TOP RESOURCES FOR TRAVEL PLANNING



NOTE: Respondents were asked to choose three.

SOURCE: TravelZoo, Christie McConnell, Senior Marketing Manager, 590 Madison Ave., New York, NY 10022; 212-484-4912; cmcconnell@travelzoo.com; www.travelzoo.com

work

Almost half of full-time employees have considered leaving their current jobs, although the majority are at least somewhat satisfied with them. Salary is the least satisfactory aspect of Americans' current jobs. Job satisfaction is a strong factor in people's general contentment with where they live.

An increasing proportion of Americans are working after traditional retirement age, and the trend does not appear to be connected to the current recession.

With more adults in their 50s, 60, and 70s staying in the workforce, there are bound to be generational differences in communication styles and expectations between older and younger workers. In general, older workers tend to view work as more central to their lives and to place a lower priority on leisure time than younger workers, but many other perceived generational differences don't hold true. Nevertheless, many workers not only make age-based assumptions about coworkers but also perceive themselves as conforming to generational stereotypes.

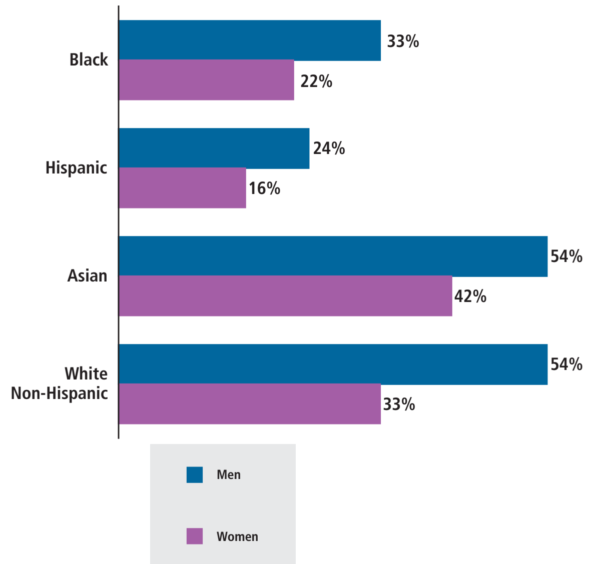
Workers younger than 35 are more likely than their older counterparts to believe they're overqualified for their current jobs. Nearly half of Millennials are in jobs that aren't what they'd like to be doing. Women are twice as likely as men to work in administrative or clerical positions.

The majority of workers would be willing to undertake professional training or other education to improve their skills so they could get better jobs. It's a tough climate, though — even teens who are lucky enough to have part-time work are keeping these jobs year-round instead of drifting in and out between summers.

Asian Americans Are Highest Earners

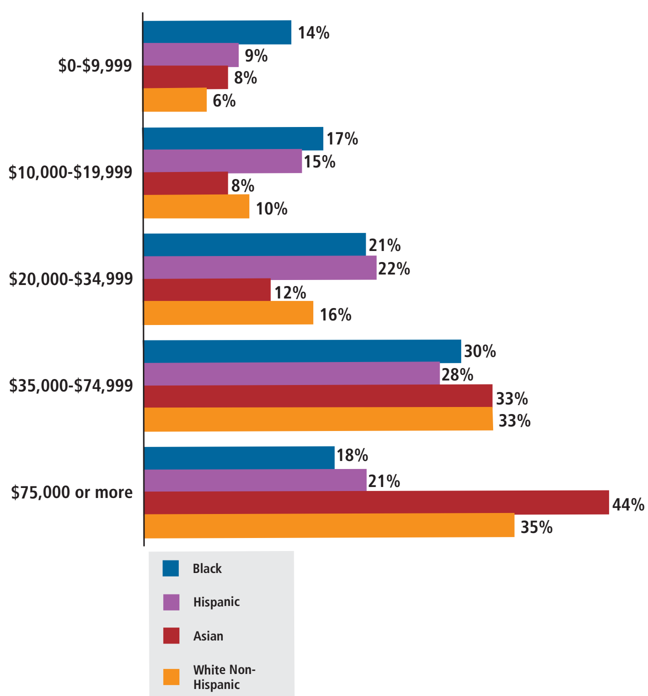
Asian Americans who work full-time are 49% more likely than employed Americans overall to earn $100,000 a year or more, according to the U.S. Census Bureau [calculations by

U.S. FULL-TIME WORKERS WHO EARN $50,000 OR MORE ANNUALLY, BY GENDER AND RACE/ETHNICITY



SOURCE: U.S. Census Bureau

TOTAL ANNUAL HOUSEHOLD INCOME, BY RACE/ETHNICITY



NOTE: Data on Blacks and Asians is for race alone or in combination with other races.

SOURCE: U.S. Census Bureau

Research Alert]. Asians are three times as likely as Hispanics or Blacks to earn six-figure salaries. Nearly two in 10 working Asians (17%) earn $100,000 or more per year, compared to 12% of Whites and 4% each of Blacks and Hispanics. Almost half (49%) of Asians earn $50,000 or more annually, compared to 45% of Whites, 27% of Blacks, and 21% of Hispanics.

Men who work full-time earn significantly more than their female counterparts; this holds true for all racial/ethnic groups. The male/female wage gap is smallest among Asians; Asian men are 29% more likely than Asian women to earn $50,000 or more per year [calculations by Research Alert]. Black and Hispanic men are 50% more likely than their female counterparts to earn $50,000 or more per year, and White men are 64% more likely than White women to earn that much.

SOURCE: Current Population Survey, Annual Social and Economic Supplement, 2010; release date June 2011, U.S. Census Bureau, Public Information Office, 600 Silver Hill Rd., Washington, DC 20233; 301-763-3030; pio@census.gov; www.census.gov

Dog Owners Dominate C-Suite Jobs

People who own dogs are more likely than those who own other kinds of pets to have jobs in senior management such as CEO or CFO, according to CareerBuilder.com. Those who own snakes or other reptiles are most likely to earn six-figure salaries.

Workers who keep birds as pets are more likely than owners of other pets to be satisfied with their jobs. Pet owners tend to cluster in specific professions:

- Dog owners: professors, nurses, information technology professionals, military professionals, and entertainers.
- Cat owners: physicians, real estate agents, science/medical lab technicians, and machine operators.
- Bird owners: Advertising professionals, sales representatives, and construction workers.
- Reptile owners: Engineers, social workers, editors/writers, and police officers.

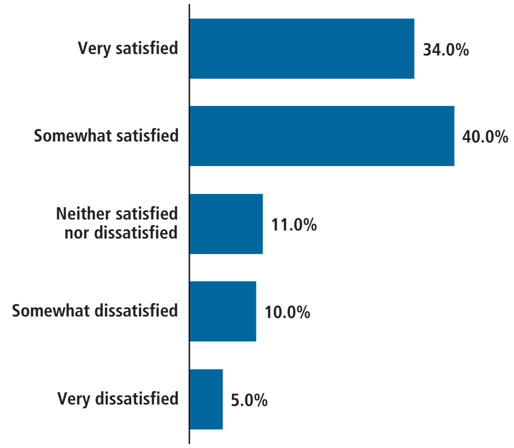
SOURCE: CareerBuilder.com, Jennifer Grasz, 200 N. LaSalle St., #1100, Chicago, IL 60601; 773-527-1164; jennifer.grasz@careerbuilder.com; www.careerbuilder.com. Price: Contact for information.

Workers Are Unhappy With Salaries

Almost half (47%) of full-time employees have considered leaving their current positions, and 21% have already applied for other jobs in the past six months, according to enterprise feedback management and market research firm MarketTools. At the same time, however, 74% are either very satisfied or somewhat satisfied with their current jobs.

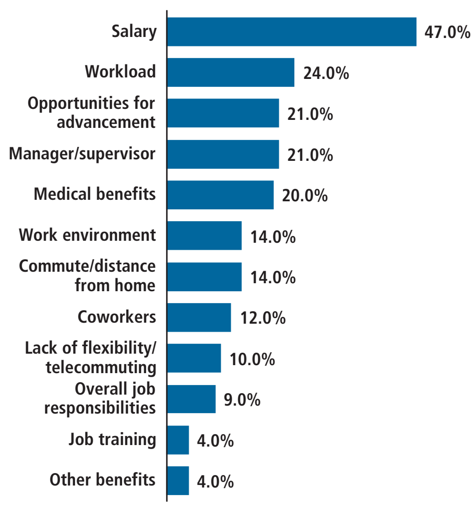
Salary is the top reason for dissatisfaction, cited by nearly half of respondents. Workload, lack of opportunities for

JOB SATISFACTION AMONG FULL-TIME EMPLOYEES, MARCH 2011



SOURCE: MarketTools

ASPECTS OF THEIR JOBS WORKERS FIND LEAST SATISFACTORY



NOTE: Multiple responses allowed.

SOURCE: MarketTools

advancement, and conflicts with supervisors are also factors.

Six in 10 employees (61%) say their companies don't have formal programs to solicit employee feedback. Among companies that do request feedback, most ask quarterly or less often, though almost a quarter (23%) request it at least once a week.

SOURCE: "Employee Satisfaction and Employee Feedback, March 2011," MarketTools, Justin Schuster, VP of Enterprise Products, 150 Spear St., San Francisco, CA 94105; 415-957-2049; info@markettools.com; www.markettools.com. Price: Contact for information.

Workers Hold Age-Based Stereotypes

Assumptions about generational characteristics can lead to workplace tensions and lowered productivity, finds workforce development firm AchieveGlobal. In addition, many widely accepted beliefs about the various generations don't hold up to scientific scrutiny.

The following general age-based differences are the only ones the study found scientifically valid:

- Older workers have a stronger sense of personal commitment to work and regard it as more central to their lives than younger workers do;
- Younger employees value their leisure time more highly than older employees;
- Younger workers self-report a greater degree of individuality at work than older workers do.

Stereotyped thinking about coworkers based on their ages is common among workers of all ages and at all levels within companies. Workers at the highest managerial levels are the most likely to make age- or generation-based assumptions about other employees.

Interestingly, workers are also likely to view their own abilities and habits as conforming to generational stereotypes.

SOURCE: "Age-Based Stereotypes: Silent Killer of Collaboration and Productivity," AchieveGlobal, Craig Perrin, Director of Product Development, 8875 Hidden River Pkwy., #400, Tampa, FL 33637; 813-631-5517; call.center@achieveglobal.com; www.achieveglobal.com/agestereotypes. Free download with registration.

Americans Are Working Later In Life

Increasing numbers of Americans are working well into what used to be considered the retirement years, according to the Employee Benefit Research Institute (EBRI). From a low point of 29.4% in 1993, the percentage of adults ages 55 or older who are in the labor force has steadily increased, reaching 40.2% in 2010.

Nearly half (46.4%) of men ages 55 and older were in the labor force in 2010, as were 35.1% of women. Nearly all of the overall growth in labor force participation among this group is due to an increase in the proportion of women continuing to work after age 55. The proportion of men ages 55 and older participating in the labor force in 2010 reflects a 6% decline since 1975. By comparison, the proportion of women age 55 and older increased 52% over the same time frame (calculations by Research Alert).

Among women ages 55-59, more than two thirds (68%) were in the labor force in 2010.

Highly educated adults tend to stay in the workforce longer than their less-educated peers. More than six in 10 adults (63%) ages 55 and older with graduate or professional degrees were in the labor force in 2009, compared to only 22% of those without high school diplomas.

Although the recession has affected older Americans' retirement incomes, particularly those whose assets include stocks, bonds, and mutual funds, there's also a need to continue working to retain access to employment-based health insurance. Extended participation in the labor force appears to be a long-term trend, which has continued despite the economic downturn, rather than solely because of it.

SOURCE: "Labor-Force Participation Rates of the Population Age 55 and Older: What Did the Recession Do to the Trends?" EBRI Notes, February 2011, Employee Benefit Research Institute, Craig Copeland, Report Author, 1100 13th St., NW, #878, Washington, DC 20005; 202-775-6356; copeland@ebri.org; www.ebri.org

Part-Time Workers Most Likely To Volunteer

People who are employed part-time are most likely to do additional volunteer work — 33% do, compared to 28% of full-time workers and 24% of unemployed adults, according to the Bureau of Labor Statistics. Although it might seem counterintuitive, adults who are not in the labor force are least likely of all groups to volunteer — 22%.

The likelihood of volunteering rises with education; 42% of adults with bachelor's degrees or more education volunteered in 2010, compared with 29% of those with associate's degrees or some college, 18% of high school graduates, and 9% of those without high school diplomas.

Participation in volunteer activities rises sharply between ages 25-34 (22% volunteer) and ages 35-44 (32%) and then gradually tapers off with age.

Women (29%) are more likely than men (23%) to volunteer. Women are more likely than men to volunteer to tutor or teach; raise funds; collect, prepare, distribute, or serve food; provide office services; and collect, make, or distribute crafts, clothing, or other non-food items.

Men are more likely than women to volunteer to provide general labor or supply transportation; coach or referee sports teams; provide professional or management assistance, such as serving on board committees; and serve as ushers, greeters, or ministers.

SOURCE: "Volunteering in the United States, 2010," Bureau of Labor Statistics, Division of Information and Marketing Services, PSB Suite 2850, 2 Massachusetts Ave., NE, Washington, DC 20212; 202-691-5200; blsdata_staff@bls.gov or cpsinfo@bls.gov; www.bls.gov/cps

Good Jobs Linked With Higher Satisfaction With Community

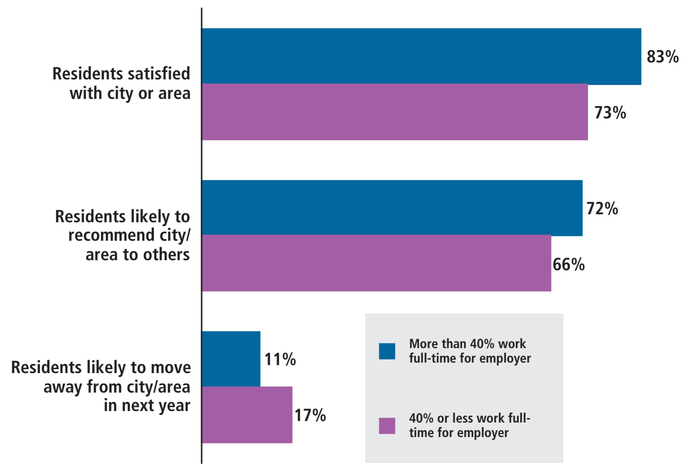
People are more likely to be satisfied with where they live in countries where more than 40% of workers are employed full-time than in countries where 40% or less are employed full-time, according to Gallup.

Among the 134 countries studied, none of the countries with comparatively high proportions of people employed in "good jobs" (defined as full-time jobs working for employers) had high proportions of people planning to leave their communities.

Although other factors such as political stability and income per capita affect residents' quality of life, there are consistent ties between the number of good jobs and residents' level of attachment to where they live, even when comparing countries whose living standards are otherwise similar.

A separate Gallup study finds that 14% of adults worldwide would like to relocate permanently to a different country from the one in which they're living. The U.S is the preferred destination, chosen by 23%. Others in the top five are the UK (7%), Canada (7%), France (5%), and Spain (4%, tied with Australia, Germany, and Saudi Arabia).

GLOBAL RESIDENTS' SATISFACTION WITH THEIR COMMUNITIES, BY LEVEL OF EMPLOYMENT IN THEIR COUNTRIES



SOURCE: Gallup

SOURCE: Gallup, Steve Crabtree, Consultant, 901 F St., NW, Washington, DC 20004; 202-715-3030; socialandeconomicanalysis@gallup.com; www.gallup.com. Price: Selected data available online at no charge.

Young Workers Feel Overqualified

A third (33%) of full-time employees in the U.S. consider themselves overqualified for their jobs, according to Ipsos Public Affairs. Only 3% feel they're underqualified. Workers younger than 35 are more likely than those age 35 and older to consider themselves overqualified (44% vs. 27%). Adults with college degrees are more likely than those with less education to feel overqualified (38% vs. 30%).

More than six in 10 workers (62%) wish they had more skills — 41% wish for "hard skills" such as a degree or industry-specific knowledge, while 30% would like to improve their "soft skills," such as leadership and organizational intelligence.

Almost two thirds of workers (64%) would be willing to take action to improve their skills in order to get a better job. Workers under 35 are more willing to take such steps than older workers who are established in their careers.

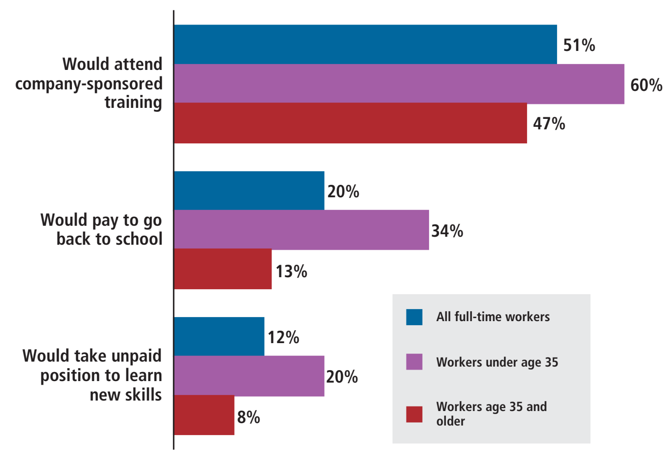
Nearly four in 10 female workers (38%) think they're paid less than men in comparable positions, up from 34% in 2008, according to CareerBuilder. A similar proportion believe men have better opportunities for career advancement in their organizations, up from 26% in 2008. Three in 10 men surveyed (30%) hold management positions, compared to 21% of women. Almost half of women (49%) describe their jobs as administrative or clerical, compared to 25% of men.

The majority of men believe that women and men are paid equally for comparable work in their organizations (84%) and that career advancement opportunities are equal (77%).

SOURCES: Ipsos Public Affairs, Rebecca Sizelove, Senior Research Manager, 1271 Ave. of the Americas, 15th Fl., New York, NY 10020; 212-584-9253; rebecca.sizelove@ipsos.com; www.ipsos-na.com. Price: Conatct for information.

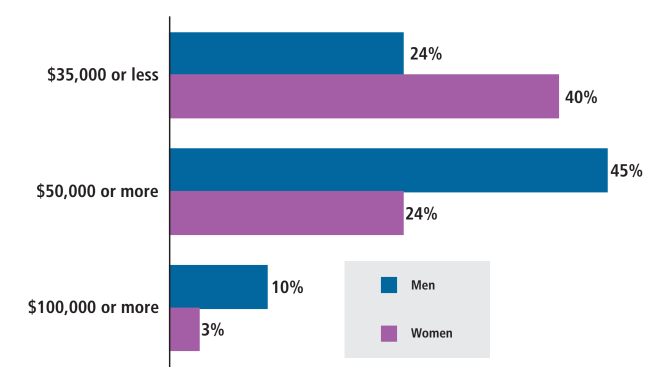
CareerBuilder, Jennifer Grasz, 200 N. LaSalle St., #1100, Chicago, IL 606061; 773-527-1164; jennifer.grasz@careerbuilder.com; www.careerbuilder.com. Price: Contact for information.

ACTIONS U.S. WORKERS WOULD BE WILLING TO TAKE TO IMPROVE SKILLS SO THEY CAN GET A BETTER JOB



SOURCE: Ipsos Public Affairs

SELF-REPORTED ANNUAL SALARIES OF FULL-TIME WORKERS, BY GENDER, 2011



SOURCE: CareerBuilder

Summer Work? Ha. Teens Toil For Their Money Year Round

The most lucrative employers for those ages 13-15 are restaurants, while those 16-17 earn the most by working at a business other than retail or the food industry, according to C&R Research.

Today's teens work year-round — at least those who can find employment in this struggling economy. Four in 10 13-15-year-old restaurant workers (40%) toil at their part-time jobs year round, compared to 22% who work part-time during the summer and 21% who work periodically just to earn a little extra money.

Likewise, 43% of 13-15-year-olds who work in retail are employed part-time throughout the year, while 18% work part-time during the summer and 34% work periodically.

The trend is even more pronounced when it comes to those 16-17. Some 78% of 16-17-year-old retail workers work part-time throughout the year, with only 13% only working part-time during the summer.

Nearly six in 10 16-17-year-olds (57%) work part-time at a restaurant and 14% work full-time throughout the year. One in four work part-time during the summer and 5% work full-time during the summer months.

WEEKLY EARNINGS BY TEENS, BY INDUSTRY, 2011

	13-15	16-17
Restaurant	$92.90	$112.80
Retail	$78.30	$119.20
Other business	$72.50	$135.60

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.

What Millennials Want In A Job

Nearly half of employed Millennials (49%) are in a job they do not want to be in, according to SBR Consulting. A similar percentage (46%) feel the economy has "severely hampered my start in life." More than one in four (27%) still rely on their parents for financial support to help pay bills.

Despite the challenging work environment, 64% are positive about their future career path. They also realize they are lucky to have a job. One in three (36%) have worked for a company that has laid off employees since 2007. While nearly half (46%) would prefer to work for themselves, only 9% plan to open a business within the next five years.

When asked to describe their dream careers, their top three goals are compensation, a flexible work schedule, and the opportunity to make a difference. They might also want to consider a 401K, as only 41% make saving for retirement a priority.

SOURCE: SBR Consulting, Stacey Randall, Chief Consultant, 704-362-4071; stacey@sbrconsulting.com; www.sbrconsulting.com.

Students Seek Careers Full Of Passion, Fulfillment

Eight in 10 high school and community college students think a career should be something that brings "enjoyment and fulfillment to their life," according to career counseling agency CPP. Nearly three in four (72%) plan to choose a job that aligns with their passions, and 53% believe this job will play a role in defining them as an individual. Almost six in 10 (58%) believe "enjoyment of the work itself" is the primary motivator for people who are highly successful in their careers.

Most students are future-focused. More than eight in 10 (81%) "constantly" or "frequently" think about their future career, though 26% admit they have "little to no defined career direction."

Most students don't believe their parents feel passionate about or fulfilled by their work. their parents have. More than half say their parents like what they do but they suspect they'd rather do something else" (30%) or that their parents don't like what they do, but feel they need to do it for the money (27%).

SOURCE: CPP, Noreen Chan, 1055 Joaquin Rd., 2nd Fl., Mountain View, CA 94043; 800-624-1765, x162, nchan@cpp.com; www.cpp.com.

factoids

- Almost a quarter of **employed adults** are looking for a new job outside of their current company. *(Rasmussen Reports; phone: 732-776-9777)*
- Nearly nine in 10 adults (89%) think it will be difficult for recent college graduates to find **jobs**. *(Rasmussen Reports; phone: 732-776-9777)*
- Men are three times more likely than women to **earn** at least $100,000 a year (10% vs. 3%). *(Careerbuilder.com; phone: 773-527-1164)*
- The cost to maintain the **office candy jar** averages $546 a year. *(Hartman Group; phone: 425-452-0818)*
- The proportion of **workers** who habitually come to work late dropped from 20% in 2008 to 15% in December 2010. *(CareerBuilder; phone: 773-527-1164)*
- More than one in 10 Americans (13%) think having an **affair with a boss** could lead to a promotion. *(Adecco Group; phone: 212-227-0110)*
- Women's and men's earnings will become equal in 2056 if the **wage gap** continues to close at its current pace. *(Institute for Women's Policy Research; phone: 202-785-5100)*
- Of U.S. residents who have worked for the **military** in the past five years, 69% are Non-Hispanic White, 14% are Black, 11% are Hispanic, and 3% are Asian. *(Pew Hispanic Center; phone: 202-419-3600; calculations by* RESEARCH ALERT*)*
- More than three quarters of workers (78%) had job-related New Year's resolutions, and 61% say **work** will be more of a priority for them in 2011 than it was in 2010. *(Monster.com; phone: 978-823-2627)*
- Half of **information technology** professionals split their work time among office, home, and other remote locations. *(Forrester Research; phone: 617-613-6441)*

FAST FACTS: Company Picnics

- 41% of **U.S companies** plan to host them in 2011.
- 63% say **family members** are always or sometimes invited.
- 50% of **employees** say they usually attend.
- Average company **picnic costs**: $4,116.
- Seven in 10 always (41%) or sometimes (28%) include giveaways of **promotional items**.
- **Top giveaways** are: t-shirts (51%), games/toys such as Frisbees (44%), caps/headwear (32%).

SOURCE: Advertising Specialty Institute; phone: 215-953-4000; www.asicentral.com

FAST FACTS: Restaurants

- The **restaurant industry** employs about 10% of the total U.S. workforce.
- More than half (56%) of first-line supervisors/managers in **food preparation** and service are women; 16% are Hispanic (men or women), and 15% are African American.
- Almost half (46%) of **restaurant employees** hope to own their own restaurants someday.
- Almost half (47%) of all adults have worked in the **restaurant industry** at some point in their lives.

SOURCE: National Restaurant Association; phone: 202-331-5900; www.restaurant.org

youth

Media and technology are part of children's lives beginning almost as soon as they're born. More than a third of moms say their children are using cell phones and/or smartphones and handheld and/or console videogames by age four. Toddlers watch more than three hours of television daily, and more than one in 10 children have TV sets in their bedrooms by age three.

That doesn't mean they're not also engaged in reading and playing with traditional toys, however; it's simply that new media and high-tech devices are an integral part of their early landscape. Children use and want the devices adults have; three in 10 6-12-year-olds want to "buy" iPads, computers, and iPod Touch devices in the next six months.

The increasing media and tech savvy of very young children reflects, in part, the fact that their Millennial parents have grown up using these media and devices.

Young parents play videogames with their young children, and "friend" their preteens on Facebook. More than seven in 10 working Millennials claim they couldn't live without the Internet, and almost four in 10 college students feel they couldn't refrain from checking their mobile devices for more than 10 minutes.

For better or worse, children believe there are real differences between girls and boys. The majority believe boys are better than girls at sports, while small proportions believe girls are better than boys at various activities, including sports, fashion, dancing, gymnastics, academics, cooking/cleaning, and behaving nicely.

Kids Buy Toys & Candy; Want iPads

Children ages 6-11 receive an average of $7.35 per week in allowance money, according to Mintel data cited in an eMarketer report. How they choose to spend their money varies by age and gender — toys, candy, and videogames are priorities.

Kids also aim for big-ticket items beyond the reach of a weekly allowance, with the number-one consumer electronics item on their list being an iPad.

TOP 5 ITEMS KIDS AGES 6-8 BUY WITH ALLOWANCE

BOYS		GIRLS	
Toys	70%	Toys	74%
Videogames	48%	Candy/gum	48%
Candy/gum	40%	Videogames	13%
Movies	12%	Movies	11%
Collecting cards	11%	Clothing	11%

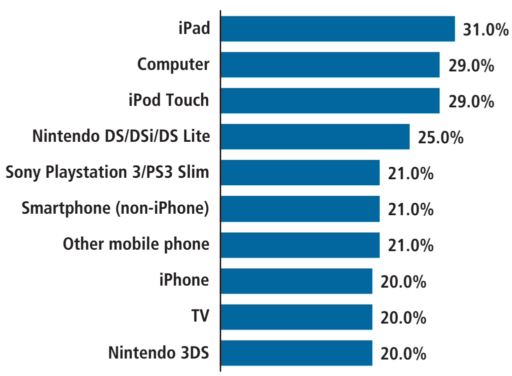
SOURCE: Mintel, December 2010, cited by eMarketer

TOP 5 ITEMS KIDS AGES 9-11 BUY WITH ALLOWANCE

BOYS		GIRLS	
Videogames	70%	Candy/gum	46%
Toys	46%	Toys	42%
Candy/gum	37%	Clothing	39%
Collecting cards	18%	Videogames	19%
Movies	11%	Movies	12%

SOURCE: Mintel, December 2010, cited by eMarketer

CONSUMER ELECTRONICS KIDS AGES 6-12 WOULD LIKE TO BUY IN NEXT 6 MONTHS, OCTOBER 2010



SOURCE: Nielsen, cited by eMarketer

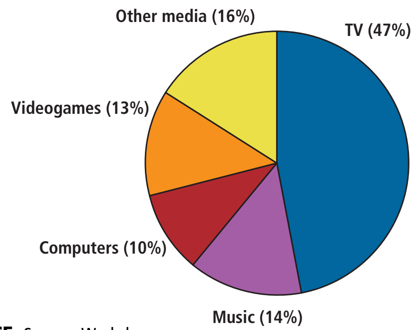
SOURCE: "Demographic Profile — Children, February 2011," eMarketer, David Iankelevich, VP Sales and Business Development, 75 Broad St., 31st Fl., New York, NY 10004; 212-763-6037; diankelevich@emarketer.com; www.emarketer.com. Price: $695.

Toddlers Watch Three Hours Of TV Daily

Eight out of 10 toddlers and preschoolers watch television on a typical day, according to The Joan Ganz Cooney Center at Sesame Workshop. Children ages 2-5 watch an average of three hours and 33 minutes of television daily.

School-age children watch slightly less TV than preschoolers; kids ages 6-11 watch seven fewer minutes of TV and video than those ages 2-5. TV makes up almost half of kids' media use. A quarter of five-year-olds have TV sets in their bedrooms, and by age eight more than half do.

HOW CHILDREN AGES 5-10 SPEND THEIR MEDIA TIME



SOURCE: Sesame Workshop

When they're young, at least, much of children's TV viewing is educational and geared specifically to their age group: public television programs account for 13% of morning viewing among kids ages five and younger, while Nickelodeon makes up 27% and the Disney Channel 16%.

Older children are quickly becoming comfortable with alternative and portable video formats; among kids ages 8-18, 20% of total video viewing occurs via mobile phones or online.

SOURCE: "Always Connected: The New Digital Media Habits of Young Children," Lori Takeuchi, Director of Research, The Joan Ganz Cooney Center, Sesame Workshop, 1900 Broadway, New York, NY 10023; 212-595-3456; cooney.center@sesameworkshop.org; www.joanganzcooneycenter.org

FACTS ABOUT U.S CHILDREN

The percentage of teens ages 12-17 enrolled in gifted classes has increased from 21% in 1998 to 27% in 2009, according to the most recent Census figures. Other findings:

- Youth participation in sports decreased from 41% in 2006 to 36% in 2009.
- The number of children who eat dinner with a parent seven times a week grew from 69% in 1998 to 72% in 2009.
- The proportion of children whose parents praised them at least three times a day increased from 48% in 1998 to 57% in 2009.
- In 2009, 45% of children ages 1-2 were read to at least seven times a week, up from 37% in 1998.
- In 2009, 5% of children ages 6-11 and 9% of teens ages 12-17 repeated a grade.

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

Children Use Media Early, Often

Media use starts almost as soon as life begins, with children under age two using everything from handheld videogames to MP3 players independently, according to Ipsos OTX Media CT.

Households with preschool children are more likely than those with children ages 6-12 to own laptops (82% vs. 76%), gaming consoles (76% vs. 63%), Web-enabled mobile phones (69% vs. 65%), and handheld gaming devices (38% vs. 24%). (This is most likely because younger children tend to have young parents; both Millennials and Gen Xers are avid gamers, according to Pew Research — see RESEARCH ALERT, April 15, 2011.)

By ages 3-5, the majority of children are watching TV, DVDs, and DVR programs; playing videogames on consoles, handhelds, and MP3 players; reading books or magazines; and playing electronic educational games by themselves.

Children ages 6-12 spend 28% of their waking hours using media on a typical day — a total of 3.7 hours. Children's media use is growing, mostly due to increased videogame play. Time spent playing videogames nearly doubled between 2008 and 2011 (including time spent multitasking), from just over half an hour to nearly an hour. Gaming is a family activity: More than eight in 10 parents of 6-12-year-olds (84%) who own videogame devices say they play games on them with their children every week.

More than nine in 10 parents watch live TV and DVR recordings with their kids weekly. Watching video is an increasingly pan-medium activity; more than half of parents have watched videos on gaming consoles (65%), iPads (64%), and desktop (57%) or laptop (54%) computers with their kids in the past week. Nearly half have watched on netbooks (48%) or iPod Touch devices (47%).

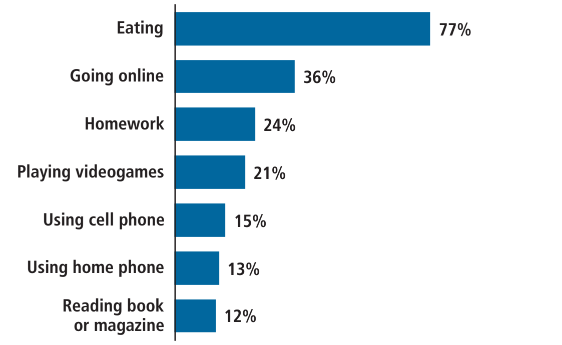
Television still accounts for the largest share of kids' media use, making up 40% of their daily media time. Like adults, children often engage in other activities while they're watching TV.

Kids ages 6-12 who go online while they're watching TV are most likely to be playing online games by themselves (61%), visiting websites (32%), browsing social networks (30%), playing games with others (25%), and using email (22%).

Almost a quarter of children ages 6-12 — 10% of 6-8-year-olds, 23% of 9-10-year-olds, and 41% of 11-12-year-olds — visit social networks regularly, despite most social networking sites' policies that users must be 13 or older. Nearly eight in 10 parents (79%) whose children visit social networks have "friended" their kids.

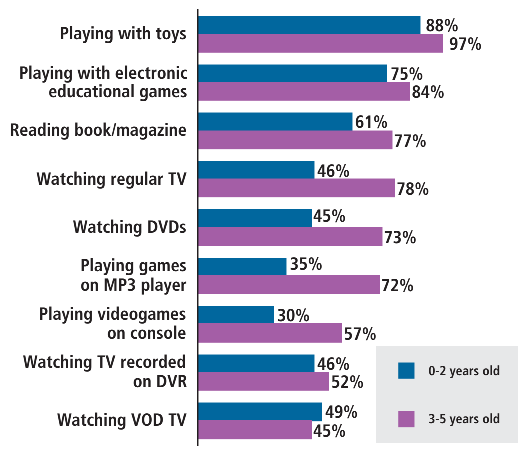
SOURCE: "LMX (Longitudinal Media Experience) Family: A Brief History of the Future, April 2011," Ipsos OTX Media CT, Donna Sabino, SVP Kids and Family Insights, 275 Seventh Ave., New York, NY 10001; 212-524-8242; donna.sabino@ipsos.com; www.ipsos.com. Price: Contact for information.

ACTIVITIES CHILDREN AGES 12 AND UNDER DO WHILE WATCHING TV



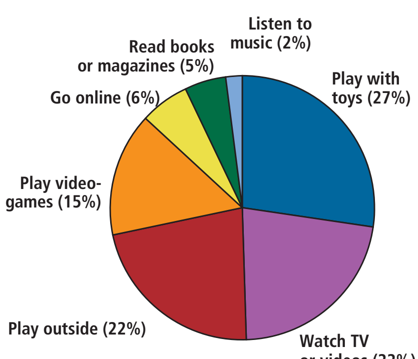
SOURCE: Ipsos OTX Media CT

ACTIVITIES PRESCHOOL-AGE CHILDREN DO BY THEMSELVES



SOURCE: Ipsos OTX Media CT

3-5-YEAR-OLDS' FAVORITE ACTIVITIES TO DO ON THEIR OWN



SOURCE: Ipsos OTX Media CT

Preschoolers Watch TV Every Day

Eight out of 10 toddlers and preschoolers watch television on a typical day, according to The Joan Ganz Cooney Center at Sesame Workshop. Children ages 2-5 watch an average of three hours and 33 minutes of television daily.

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When they're young, at least, much of children's TV viewing is educational and geared specifically to their age group: public television programs account for 13% of morning viewing among kids ages five and younger, while Nickelodeon makes up 27% and the Disney Channel 16%.

Older children are quickly becoming comfortable with alternative and portable video formats; among kids ages 8-18, 20% of total video viewing occurs via mobile phones or online.

SOURCE: "Always Connected: The New Digital Media Habits of Young Children," Lori Takeuchi, Director of Research, The Joan Ganz Cooney Center, Sesame Workshop, 1900 Broadway, New York, NY 10023; 212-595-3456; cooney.center@sesameworkshop.org; www.joanganzcooneycenter.org

For Kids, Summer Means Media

More than half of parents with children under 18 at home (57%) say they relax their restrictions on their kids' media use during the summer, according to Adweek/Harris Interactive.

About a quarter (26%) don't loosen their media restrictions during summer, while 17% say they never restrict their children's media use. Parents who live in the Midwest (21%) and South (20%) are more likely than those in the Northeast (11%) to say they never restrict their kids' media use.

Televisions of their own are the first entertainment/media technology children acquire; more than one in 10 children have televisions in their bedrooms by age 3.

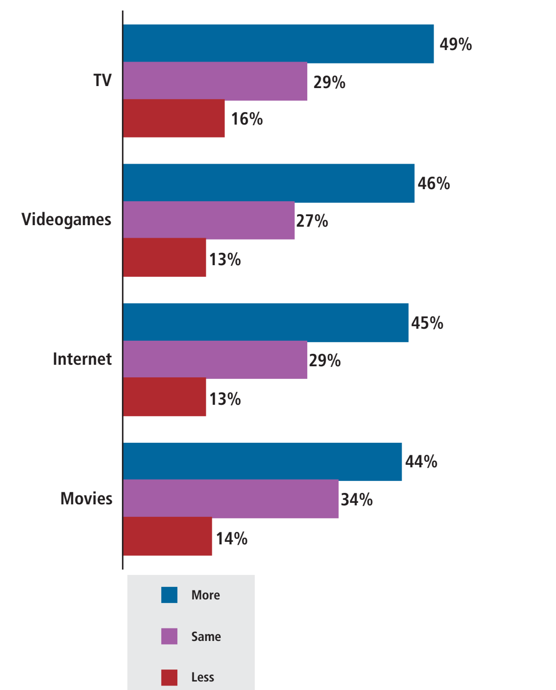
More than a third of moms say their children were using cell phones and/or smartphones, videogame (console) systems, and handheld gaming devices by age four, according to a *Parenting* magazine/BlogHer study. The younger the parent, the earlier her kids start using media and communication devices.

Although children begin using their parents' technology (and their own) early, they're not as attached to it as moms (at least according to moms). Moms are most likely to cite their laptops and cell phones as the devices they can't live without.

Kids' preferences are more evenly split among various devices, though more than half of moms (53%) say they haven't seen their children go for more than a day without watching TV. More than seven in 10 moms say they themselves haven't gone more than a day without using their mobile phones (71%) or the Internet (71%).

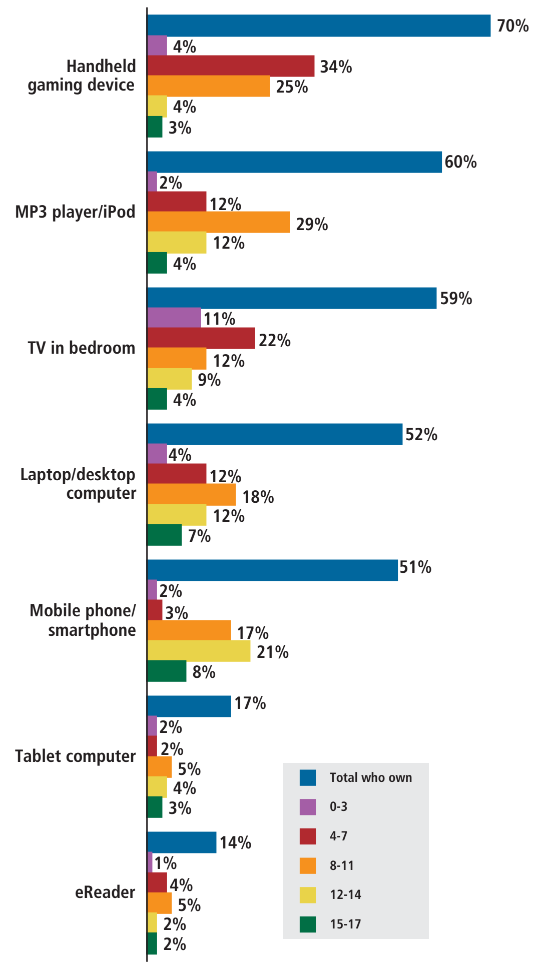
Moms place the highest value on the devices that help

HOW MUCH MEDIA CHILDREN AGES 17 AND YOUNGER CONSUME IN SUMMER, COMPARED TO SCHOOL YEAR



SOURCE: Harris Interactive

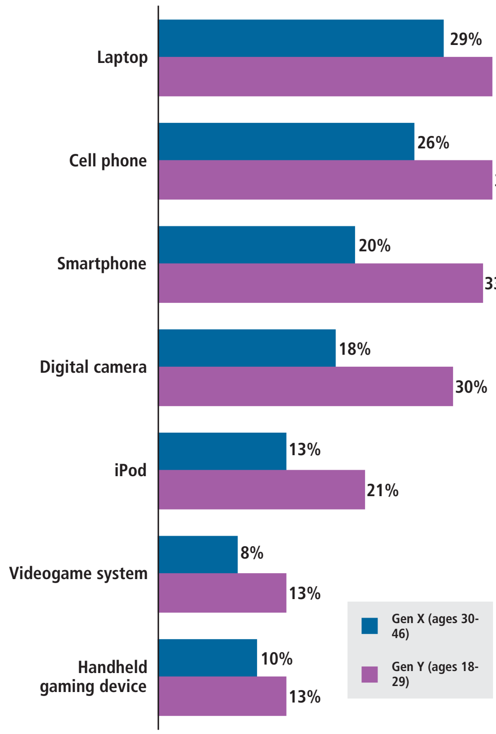
PERSONAL TECHNOLOGY OWNED BY CHILDREN AGES 17 AND YOUNGER AND AGE AT WHICH THEY GOT IT



SOURCE: Harris Interactive

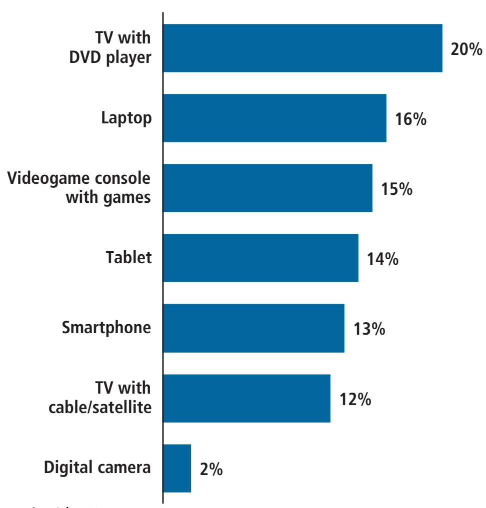
them organize their lives, communicate, and work — computers and mobile phones. Nearly nine in 10 moms define computers and Internet access as necessities rather than luxuries (88% of each). Social media is a big part of staying in touch; more than eight in 10 use Facebook at least once a day; 46% log on three or more times per day.

GEN X AND Y MOMS WHOSE CHILDREN STARTED USING TECH DEVICES BY AGE 2



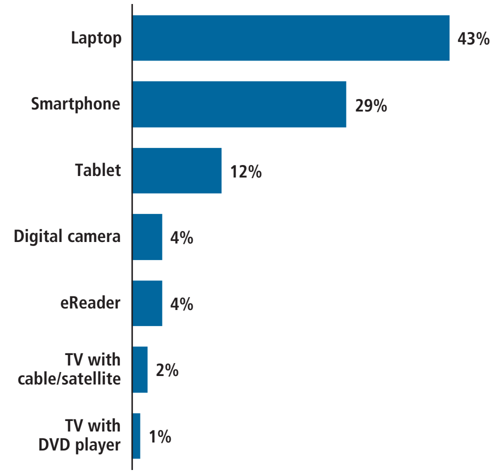
SOURCE: *Parenting*/BlogHer

TECH DEVICES KIDS CONSIDER INDISPENSABLE, ACCORDING TO MOMS



SOURCE: *Parenting*/BlogHer

TECH DEVICES MOMS CONSIDER INDISPENSABLE
(Respondents were asked which device they would choose if they could have only one)



SOURCE: *Parenting*/BlogHer

SOURCES: "Harris Poll #93," August 24, 2011, Harris Interactive, Samantha Braverman, Sr. Project Researcher, 161 Sixth Ave., New York, NY 10013; 585-272-8400; info@harrisinteractive.com; www.harrisinteractive.com. Price: Available online at no charge.

"Today's eMoms: Engaged, Enabled, Entertained," August 2011, Parenting magazine and BlogHer. The Parenting Group, Jamie Engel, Group Associate Publisher, 2 Park Ave., 10th Floor, New York, NY 10016; 212-779-5121; jamie.engel@bonniercorp.com; www.parenting.com. Price: Available online at no charge.

Food, Tech Brands Top Kids' Most Loved Brands

Kid's favorite brands mirror their interests as they age, according to Harris Interactive. Harris ranks top brands based on familiarity, quality, and purchase consideration to find tweens 8-12 favor expected young-skewing brands, such as Disney, Toys R Us, and Nickelodeon.

Technology-based brands, such as iPod and Google, and snack food and beverage brands start to appear during the teen years and technology brands become even more prevalent for young adults 18-24.

There is one brand that is a timeless favorite. Oreo's ranks in the top 10 regardless if a child is six, 16, or 24. Marketing agency Smarty Pants conducts a similar brand equity study and its findings mirror Harris's, including Nintendo's Wii as the top brand among children (YMA, 12/15/10).

SOURCE: Harris Interactive, Regina Corso, SVP Youth and Education Research, 161 Sixth Ave., New York, NY 10013; 212-539-9522; rcorso@harrisinteractive.com; www.harrisinteractive.com.

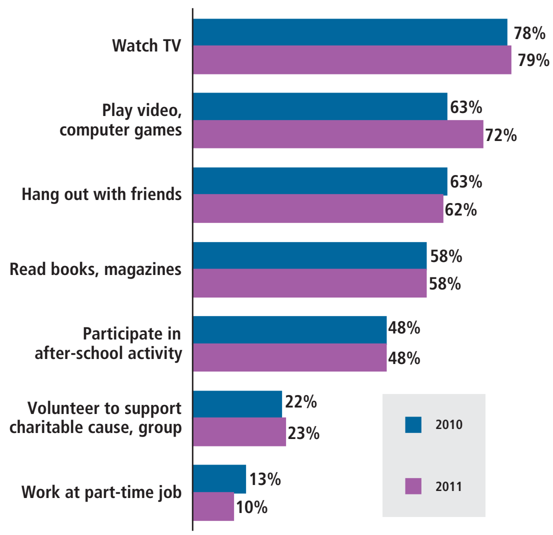
Teens Spend Free Time Watching TV, Playing Video Games, Hanging With Friends

Teens typically spend their free time watching TV (79%) and playing video or computer games (72%), according to World Vision and Harris Interactive.

Although nine in 10 teens (90%) feel it's more important than ever to help others that are less fortunate and 88% wish they could do more to help those in need, only 23% say they volunteer during their free time.

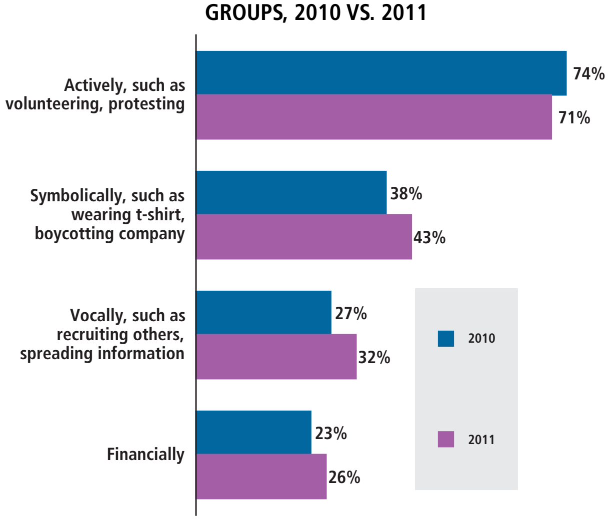
Teens primarily show their support to charitable groups actively (43%) or symbolically (37%). One in four (26%) donate money.

HOW TEENS SPEND THEIR FREE TIME, 2010 VS. 2011



SOURCES: World Vision, Harris Interactive

HOW TEENS PERSONALLY SUPPORT CHARITABLE CAUSES, GROUPS, 2010 VS. 2011



SOURCES: World Vision, Harris Interactive

FAVORITE CHILDREN'S BRANDS, BY AGE

8-12

1. Wii
2. Doritos
3. Oreo's
4. M&M's
5. DIsney Channel
6. Nickelodeon
7. Nintendo DS
8. McDonald's
9. Toys R Us

13-17

1. Reese's Peanut Butter Cups
2. iPod
3. Google
4. M&M's
5. Oreo's
6. Subway
7. Hershey's Milk Chocolate
8. Target
9. Sprite

18-24

1. Google
2. Facebook
3. iPod
4. Gatorade
5. Target
6. Subway
7. Apple
8. iTunes
9. Reese's Peanut Butter Cups

SOURCE: Harris Interactive

SOURCES: Harris Interactive, Alyssa Hall, 161 Sixth Ave., New York, NY 10013; 212-539-9749; ahall@harrisinteractive.com; www.harrisinteractive.com.

World Vision, Joan Mussa, SVP Donor Engagement Advocacy, P.O. Box 9716, Dept. W, Federal Way, WA 98063; 253-815-1000; info@worldvision.org; www.worldvision.org.

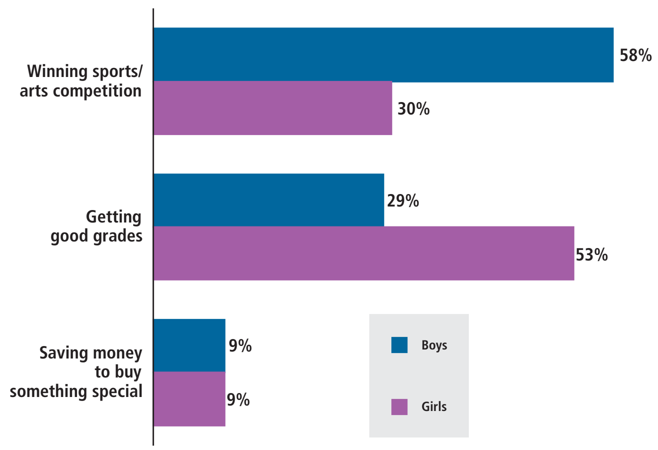
Children Take Pride In Getting Good Grades

When asked what accomplishments they're most proud of, children are most likely to cite earning good grades (45%), but there are significant differences by gender, according to the Northwestern Mutual Foundation. Boys are most likely to be proud of winning sports or arts competitions, while girls are most likely to be proud of getting good grades.

Doing well in their academic classes is the goal to which children express the strongest commitment (47%), followed by learning new skills such as playing sports or musical instruments (28%), and trying to stay healthy (17%).

Boys are significantly more likely than girls to be focused on learning to play sports or musical instruments (46% vs. 15%), while girls are more likely than boys to cite staying healthy as a major goal (30% vs. 1%).

ACCOMPLISHMENTS IN WHICH CHILDREN TAKE GREATEST PRIDE, BY GENDER



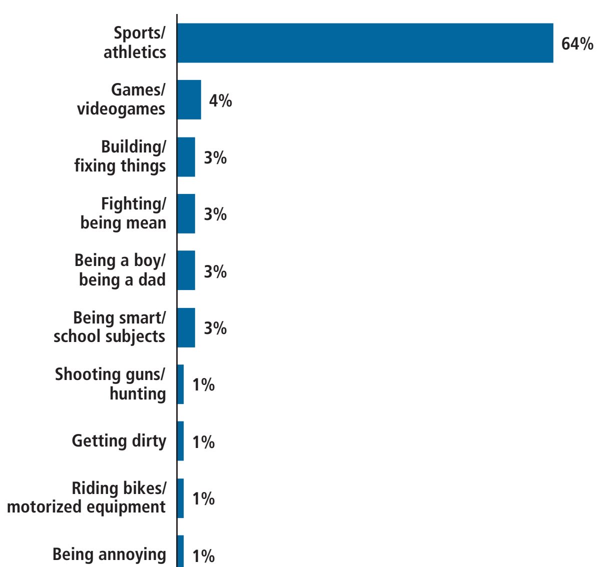
SOURCE: Northwestern Mutual Foundation

SOURCE: Northwestern Mutual Foundation, Rebekah Barsch, VP Market Strategy & Training, 720 E. Wisconsin Ave., Milwaukee, WI 53202; 414-665-6555; rebekahbarsch@northwesternmutual.com; www.northwesternmutual.com; www.themint.org.

Kids Think Boys Are Better At Sports

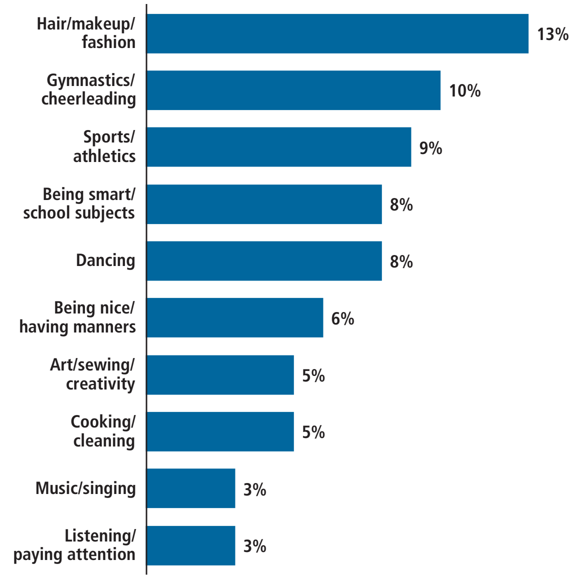
Almost two thirds of children ages 2-12 (64%) think boys are better than girls at sports and athletic activities, according to *Highlights for Children*. Kids are more evenly divided

ACTIVITIES KIDS THINK BOYS DO BETTER



SOURCE: *Highlights for Children*

ACTIVITIES KIDS THINK GIRLS DO BETTER



SOURCE: *Highlights for Children*

on activities that girls do better than boys.

More than nine in 10 (93%) think their parents are happy. Kids believe their parents' top worries are about them or other family members (77%); 31% believe it's specifically their health and safety that concerns their parents most. About one in 10 (13%) think their parents worry most about money.

SOURCE: "2011 State of the Kid Report," *Highlights for Children*, Christine French Cully, Editor-in-Chief, 803 Church St., Honesdale, PA 18431; 570-253-1080; also, Hillary Bates, Communications Specialist; 614-487-2640; hillary.bates@highlights.com; www.highlights.com. Price: Available online at no charge.

Girls Just Like Hanging With Friends

Being with friends is the top activity enjoyed by girls 6-18, followed by shopping and listening to music, according to the virtual world Stardoll Network and Carat Global. One in seven regularly purchase products online. Eight in 10 13-15-year-old girls (79%) and 65% of those under 13 have their own cellphone. Three in 10 (30%) regularly watch TV shows online for more than 10 minutes. Also:

Girls Under 12

- 64% use a videogame console.
- 60% have never read a newspaper.
- Prefer to communicate via instant message rather than social networks.

Girls 13-15

- YouTube and Facebook are their two favorite social networks.
- 25% regularly visit online shopping sites, with 13% purchasing products.

- This age group starts to access the mobile web and mobile social networks.

Girls 16-18

- Interest in music peaks, with 50% listing the activity in their top five favorite things to do.
- Prefer to use social networks over instant messaging.

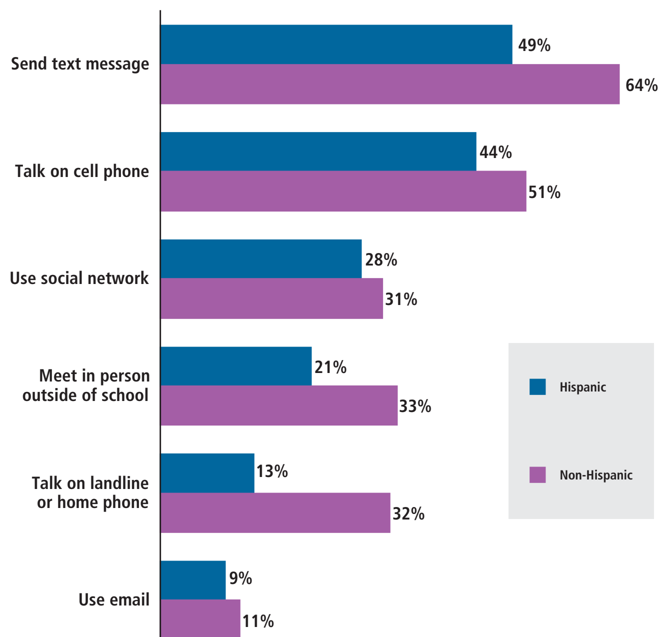
SOURCE: Stardoll Network, Joan Lockwood, 011-44-020-7292-7143; joan@stardoll.com; www.stardoll.com.

Hispanic Teens Talk, Text Less

Non-Hispanic 16-17-year-olds are more likely than their Hispanic peers to text (64% vs. 49%), talk on cell phones (51% vs. 44%), and use social networks (31% vs. 28%) to talk with their friends, according to the Pew Research Center.

Hispanic teens born outside the U.S. are even less likely to communicate electronically with their friends. Just over a quarter of foreign-born Hispanic teens (26%) text their friends daily, compared to 65% of those born in the U.S. About three in 10 (29%) talk to friends via cell phone daily, compared to 55% of their U.S.-born peers. This is partly explained by the fact that foreign-born Hispanic teens are less likely than their U.S.-born peers to own cell phones (70% vs. 84%).

HOW TEENS AGES 16-17 COMMUNICATE, HISPANIC VS. NON-HISPANIC



SOURCE: Pew Research Center

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.

The Impact Of Technology, Digital Devices On Kid Literacy

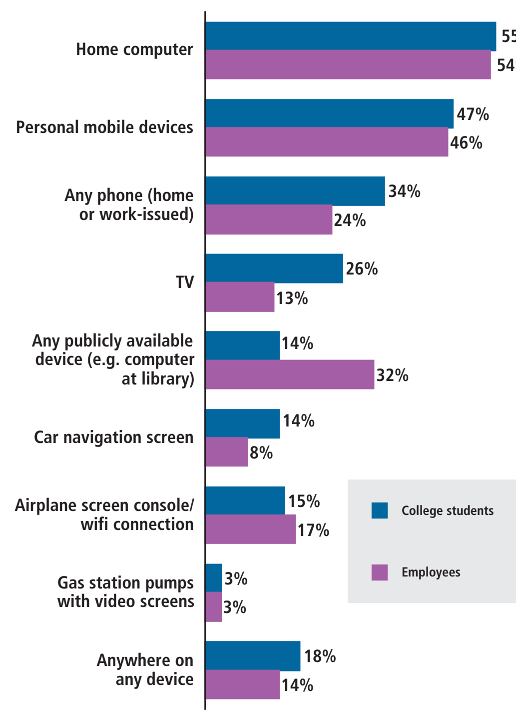
Children age 6-8 spend more time reading than they do playing videogames, watching TV, and going online. Yet their time reading decreases as they age so that by age 15, reading is bypassed by all digital activities, according to Scholastic. While kids aren't that concerned over this development, the majority of parents (56%) are.

Three in four parents (78%) wish they could take one of their child's devices away for a week, with the specific device varying by gender. Parents of boys wish to disconnect the videogame console, while parents of girls, unsurprisingly, wish they could take away the cellphone.

One in four children and teens (25%) have read a book on a digital device, most commonly a desktop computer. Younger children 9-11 (63%) express the most interest in reading books on a digital device, compared to 56% of those age 12-14 and 53% of those 15-17.

One pressing concern among parents is that technology is negatively impacting or altering the definition of their child's literacy. More than half of 9-17-year-olds (54%) consider searching for information online reading. Furthermore, children and teens are twice as likely as parents to feel reading comments posted on Facebook (28% vs. 15%) and three

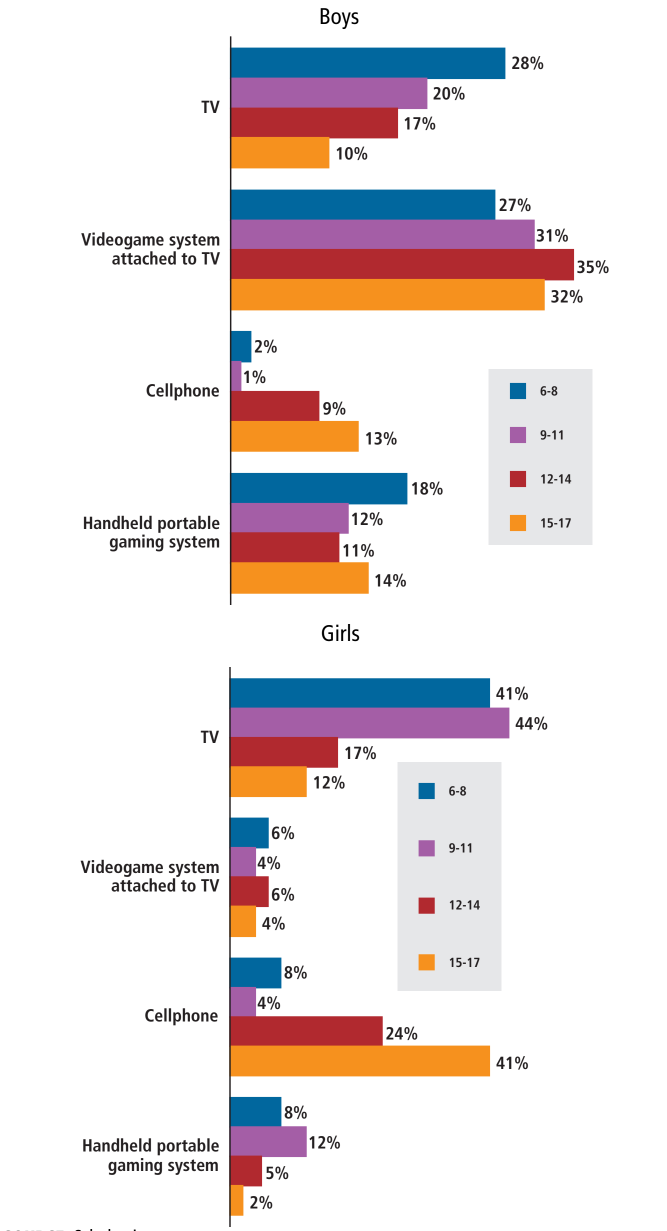
PLACES/DEVICES FROM WHICH U.S. COLLEGE STUDENTS AND EMPLOYED MILLENNIALS EXPECT TO BE ABLE TO ACCESS THEIR EMPLOYERS' NETWORKS IN FUTURE



NOTE: Multiple responses allowed

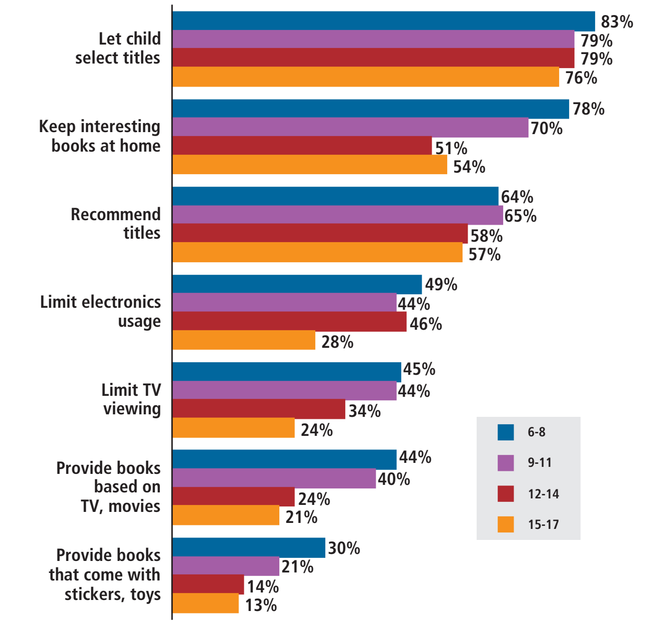
SOURCE: Cisco

TOP DEVICES PARENTS WOULD WANT THEIR CHILD TO STOP USING FOR A WEEK, BY GENDER & AGE



SOURCE: Scholastic

KIDS OUTLINE HOW PARENTS CAN INCREASE THEIR FREQUENCY OF READING, BY AGE



SOURCE: Scholastic

DEVICES USED BY 9-17-YEAR-OLDS TO READ BOOKS

Desktop computer	17%
Laptop, netbook	13%
Handheld device (iPod Touch, cellphone)	8%
Digital eBook (Kindle, Nook, Sony eReader)	7%
Apple iPad	3%

NOTE: More than one response permitted.

SOURCE: Scholastic

SOURCE: Scholastic, Francie Alexander, Chief Academic Officer, 557 Broadway, New York, NY 10012; 212-343-6100; falexander@scholastic.com; www.scholastic.com.

times as likely to feel text messages count as reading (25% vs. 8%).

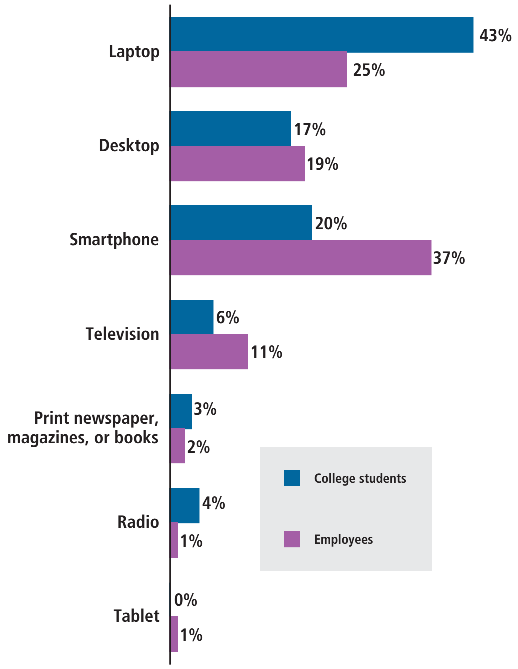
Nevertheless, children still enjoy the old fashioned way of reading. Two in three (66%) say they will always want to read books printed on paper, even though there are eBooks available.

Millennials Consider Internet Essential, Say Computers Are Their Most Important Pieces Of Technology

Seven in 10 employed U.S. Millennials (73% of those ages 21-29) say they couldn't live without the Internet, as do 58% of college students ages 18-24, according to Cisco. [The research examined the two groups separately for comparison purposes. —Ed.]

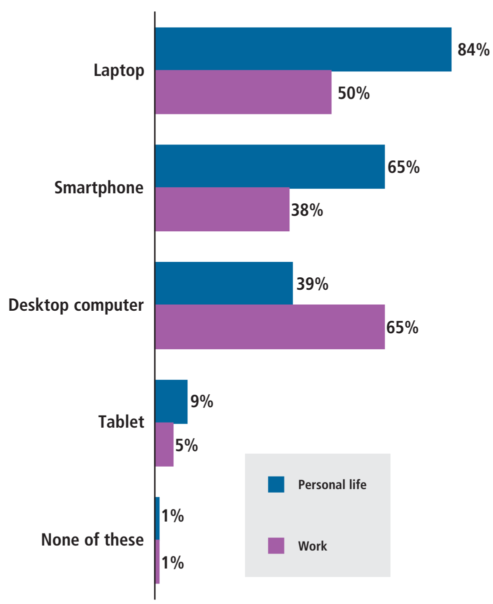
Millennials who live in China are most likely to say they couldn't live without the Internet (78% of working 21-29-year-olds and 71% of 18-24-year-old college students); those who live in Russia are least likely (38% of employees and 30% of students).

MOST IMPORTANT TECHNOLOGY IN DAILY LIFE, ACCORDING TO U.S. MILLENNIAL COLLEGE STUDENTS AND EMPLOYEES



SOURCE: Cisco

TECHNOLOGICAL DEVICES U.S. EMPLOYED MILLENNIALS USE IN THEIR WORK AND PERSONAL LIVES



SOURCE: Cisco

Just under a third of global and U.S. Millennial college students (32% of each) feel that the Internet is as important to them as food and water; nearly two thirds of Brazilian (65%) and Chinese (64%) students feel this way.

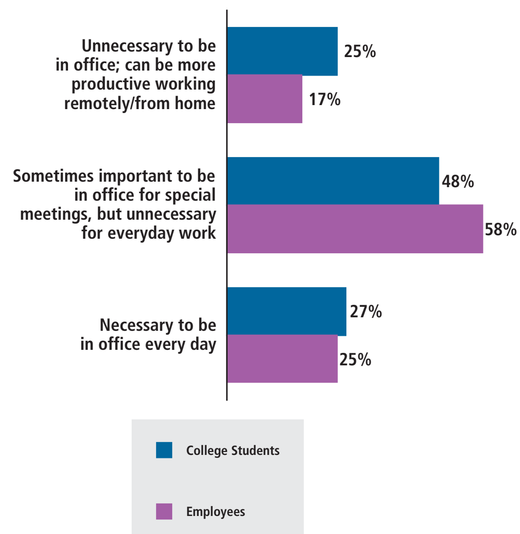
Globally, both college students and working Millennials cite their computers as the most important technologies in their daily lives. When broken out by desktop vs. laptop, however, U.S. working Millennials are more likely to cite their smartphones than either desktop or laptop computers as the most important piece of technology in their daily lives.

Students Value Internet Over Dating

Worldwide, college students consider the Internet to be more important in their daily lives than going out with friends, dating, or music. French college students are least likely of students worldwide to consider the Internet the most important activity in their daily lives (7%) and most likely to consider dating the most important (54%).

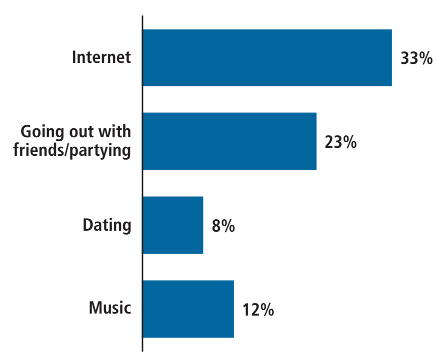
College students in Brazil and China are most likely of global students to cite the Internet as most important (72% and 59%, respectively). German (36%) and UK (33%) students are most likely to cite going out with friends as most

U.S. COLLEGE STUDENTS' AND WORKING MILLENNIALS' ATTITUDES ABOUT OFFICE PRESENCE AND PRODUCTIVITY



SOURCE: Cisco

ACTIVITIES U.S. COLLEGE STUDENTS CONSIDER MOST IMPORTANT IN THEIR DAILY LIVES



SOURCE: Cisco

important, but almost as many students in both of these countries consider the Internet most important (30% of each).

Globally, 64% of college students would rather have Internet access than a car. U.S. students would prefer a car, by a small margin: 54%. More than eight in 10 students in China (85%) and Japan (84%), and more than seven in 10 students in India (77%), Germany (75%), and the UK (72%) would choose the Internet over a car.

Although U.S. college students are more likely to consider spending time with friends important than keeping up to date on Facebook (36% vs. 18%), those in Spain (54%), Brazil (50%), India (45%), China (41%), and Italy (38%) cite Facebook as the most important social activity of their day.

More than three quarters of U.S. college students (79%) and working Millennials (76%) log onto Facebook at least once a day.

Workplace Priorities

If offered two jobs, one with a slightly higher salary but less flexibility in terms of working remotely and using mobile devices at work, and the other with greater flexibility, just over half of Millennial employees worldwide (55%) would choose the job with the higher salary.

Those in the UK (72%), Spain (65%), U.S. (62%), France (60%), and Germany (60%) are most likely to choose salary over flexibility. Millennials in Brazil (59%), India (57%), Russia (57%), Canada (52%), and China (51%) are most likely to choose the job with greater flexibility.

Worldwide and in the U.S., majorities of both college students and working Millennials don't consider/expect it to be necessary to be in an office every day in order to accomplish their work.

U.S. Millennial workers are about half as likely as Millennials globally to think their expertise with social media was a factor in getting their current job: 14% vs. 31%.

SOURCE: "2011 Cisco Connected World Technology Report," September 2011, Cisco, Marie Hatter, VP Enterprise Marketing, 170 W. Tasman Dt., San Jose, CA 95134; 408-526-4000; also, Ben Stricker; 408-527-3199; bstricke@cisco.com; www.cisco.com. Price: Available online at no charge.

Kids Viewed Fewer Food, Drink Ads In 2009 Than In 2003

Children ages 2-5 saw an average of 10.9 food-related TV ads each day in 2009, down 17.8% from 2003, according to research published in the journal *Archives of Pediatrics and Adolescent Medicine.* Children ages 6-11 viewed an average 12.7 food-related TV ads each day in 2009, down from 6.9% in 2003.

Although children viewed fewer ads for food and beverage products in 2009 versus 2003, they saw more ads for fast food chains. In fact, exposure to fast food commercials increased by 21% for children ages 2-5 and 31% for children ages 6-11.

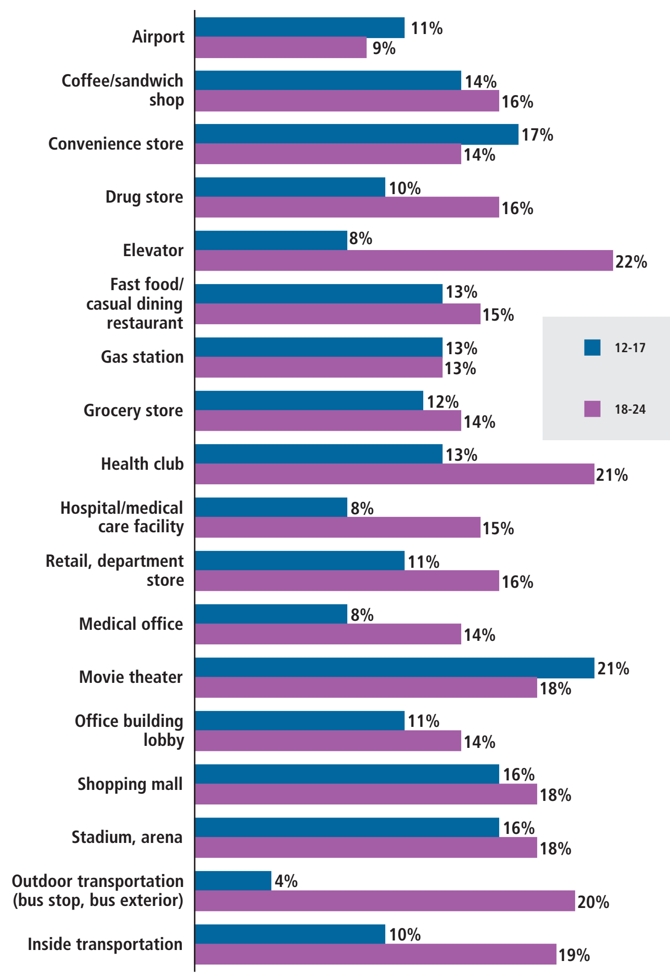
There's also been a decrease in the number of unhealthy products advertised to children, though the total number still remains relatively high. In 2009, 86% of food and drink ads viewed by children ages 2-11 featured products high in saturated fat, sugar, or salt, down from 94% in 2003.

SOURCE: "Trends in the Nutritional Content of TV Food Advertisements Seen by Children in the U.S.," *Archives of Pediatrics and Adolescent Medicine*, August 2011, Lisa Powell, Author, Institute for Health Research and Policy, University of Illinois at Chicago; 312-413-8468; powelll@uic.edu.

Movie Theater, Convenience Store Video Ads Capture Teen, Young Adult Attention

Seventy percent of 12-24-year-olds recall seeing a digital video display in the past month, according to Arbitron and Edison Research. Teens, in particular, are apt to encounter and remember video advertising displayed at movie the-

VIDEO ADVERTISING LOCATIONS WHERE TEENS, YOUNG ADULTS RECALL SEEING ADS



NOTE: Among those who recall ads

SOURCES: Arbitron, Edison Research

aters, coffee/sandwich shops and convenience stores. They are least likely to pay attention to transportation-based ads, such as exterior bus ads or on bus benches.

Young adults, comparatively, are most likely to pay attention to ads via health clubs and elevators and least likely to remember ads at the airport.

SOURCES: Arbitron, Ron Rodriguez, Marketing Communications, 9705 Patuxent Woods Dr., Columbia, MD 21046; 410-309-8822; ron.rodriguez@arbitron.com; www.arbitron.com.

Edison Research, Tom Webster, VP, 6 W. Cliff St., Somerville, NJ 08876; 908-707-4707; twebster@edisonresearch.com; www.edisonresearch.com.

Perceptions Of Future, Political Issues Vary Among Youth From Different Countries

Three in 10 U.S. young adults ages 20-29 (29%) "feel very positive" about the future of their country, compared to 45% of young adults globally who express optimism about their countries' futures, according to One Young World global consultancy. U.S. young adults are less likely than their global counterparts to say their career ambition is to run their own business (38% vs. 68%) or "work their way to the top of an established business" (40% vs. 64%).

Less than half of U.S. youth (42%) are concerned with climate change, compared to 69% of youth globally. Even though climate change may not be high on their lists of concerns, they also don't think world leaders are dropping the ball. Only 12% of U.S. youth feel the world's leaders are making significant progress toward combating climate change, compared to 65% of Chinese youth who feel this way.

U.S. youth express more positive viewpoints when it comes to technology. More than three in four (77%) feel the Internet has opened up greater business prospects for people their age."

SOURCE: One Young World, Oliver Stacey, Founder, Cupola House, 15 Alfred Pl., Camden, London Wc1E 7EB; 011-44-0-207-017-1546; oliver.stacey@oneyoungworld.com; www.oneyoungworld.com.

Peers Are Kids' Key Influencers

Children 6-11 primarily learn about new things from their classmates (84%) and TV ads (81%), according to Mintel. Half (48%) find out about new things from their parents and 40% turn to an older sibling.

There are notable age differences: those age 6-8 are more likely than those age 9-11 to have a smaller circle to learn about new products from, whereas kids 9-11 gain exposure from online ads and social networking sites.

Four in 10 kids 6-11 earn an allowance — an average $7.35 a week. Two in 10 children (20%) don't receive a weekly stipend, but say their parents buy them whatever they want. Those who do receive money are assigned chores that typically include cleaning their room, taking care of the pet, setting the table, and taking out the garbage. Boys are more likely than girls to take out the trash and mow the lawn. Girls, conversely, take care of the laundry and wash dishes.

SOURCE: Mintel, Fiona O'Donnell, Senior Analyst, 351 W. Hubbard St., 8th Fl., Chicago, IL 60610; 312-932-0400; fodonnell@mintel.com; www.mintel.com.

Teen Girls Express Contrasting Viewpoints Towards Fashion

Even though 65% of teen girls think the body image represented by the fashion industry is too skinny, 63% say it's unrealistic, and 47% feel it's unhealthy, 60% compare their bodies to fashion models, according to Dove and the Girl Scouts of the USA. Three in four teen girls say that fashion is "really important" to them.

Nine in 10 teen girls say the fashion industry (89%) and the media (88%) place "a lot of pressure" on teenage girls to be thin. Eight in 10 (81%) prefer to see "real" or "natural" photos of models rather than the airbrushed versions; 75% say they would be more likely to buy clothes featured on real-size models than on super-skinny ones.

While teen girls may claim to want to see more realistic images, they also seek to emulate skinny models. Half (48%) wish they were as skinny as models in fashion magazines, 47% say fashion magazines give them a body image to strive for, and 41% prefer to see fashion on skinny rather than fuller-sized models.

Black and Hispanic teen girls have more positive body images than White teens. Eight in 10 Hispanic girls (79%) are satisfied with their bodies, compared to 76% of Black and 72% of White teens. Nearly one in five Black teens (17%) say they are completely satisfied with their body, compared to 14% of Hispanic and 10% of White girls.

White teens (52%) are more likely than Black (32%) or Hispanic (42%) to think the fashion industry does a good job of representing diversity.

SOURCES: Dove (Unilever), Stacie Bright, 33 Benedict Pl., Greenwich, CT 06830; 203-625-1130; stacie.bright@unilever.com; www.dove.com.

Girl Scouts of the USA, Susan Swanson, VP Membership, 450 5th Ave., New York, NY 10018; 212-852-8012; sswanson@girlscouts.org; www.girlscouts.org

Generational Differences Among Today's Young Adults

It's no surprise that habits and behaviors shift over the years, yet a recent survey finds today's young adults 18-27 (and likely those younger) are unfamiliar with many occurrences that older Americans accept as standard, according to Opera Software.

- 40% have never heard a busy signal on their phone.
- 8% have never looked for a book in a library.
- 18% have never read a non-fiction book from cover-to-cover that was not for school or work.
- 13% have never sent a handwritten letter in the mail.
- 14% have never used a phone booth or other public phone.
- 32% have never subscribed to a print magazine.
- 75% have browsed the Internet on public transit.
- 31% have blogged via their cellphone.
- 90% have used their cellphone to share photos.

SOURCE: Opera Software, PO Box 2648, St. Hanshaugen, Oslo, Norway NO-0131; 011-47-2369-2400; www.opera.com.

College Students Seek Reliable, Trustworthy Brands With Value

"Value for money" (63%) is the most important brand attribute among 18-24-year-olds, followed by reliability (56%), and trustworthiness (54%), according to marketing agency Initiative. Its "Reset Generation" report emphasizes commonly held theories about the ways 18-24-year-olds interact with brands. They turn to the Internet to seek information about brands including visiting consumer review sites (43%), social network sites (34%), and blogs and forums (33%).

Although 41% are satisfied with the current ways brands communicate with them, 33% are open to participating in "direct discussion with the brand to help shape future products." One in three would attend "special branded events," and 12% would "participate in conversations about the brand with experts."

This group is equally as likely to share positive (82%) and negative (75%) brand experiences with friends and family members.

SOURCE: Initiative, Kendra Hatcher King, Worldwide Director, Insight & Innovation, One Dag Hammarskjold Plz., New York, NY 10017; 212-605-7000; www.initiative.com. Also, Tim Splengler, tim.splengler@us.initiative.com.

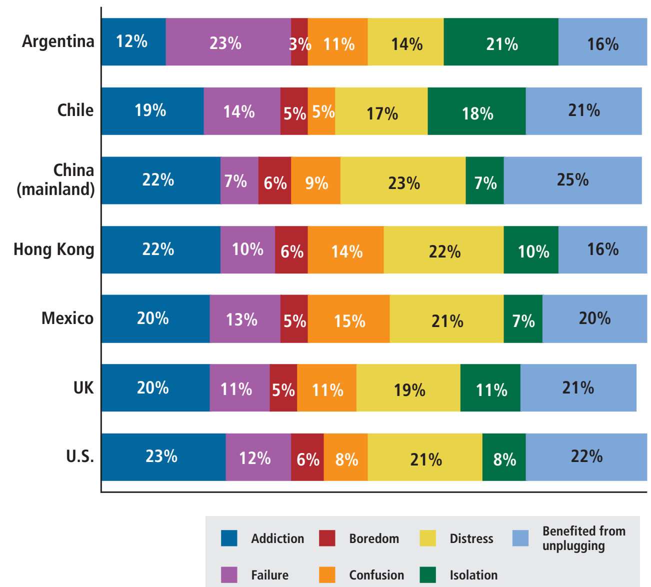
College Students Experience Both Fear And Relief When Unplugging From Technology

Although college students see benefits in unplugging from their technology for a day, they are more likely to describe negative experiences, such as boredom, distress, and to admit they are addicted to these devices, according to the International Center for Media & the Public Agenda at the University of Maryland. U.S. students are twice as likely to experience distress and feel addicted to media as they are to mention any benefit in unplugging from all technology for 24 hours.

These findings remain relatively consistent across various countries although students in Argentina are three times more likely than their U.S. counterparts to describe 24 hours without technology as "isolating."

SOURCE: "The World Unplugged," International Center for Media & the Public Agenda, University of Maryland, Susan Moeller, Director, 1117 Journalism Bldg., College Park, MD 20742; 301-405-2419; icmpa@jmail.umd.edu; www.icmpa.umd.edu.

HOW COLLEGE STUDENTS DESCRIBE THEIR MINDSET AFTER "UNPLUGGING" FROM TECHNOLOGY FOR 24 HOURS, BY COUNTRY



SOURCE: International Center for Media & the Public Agenda, University of Maryland

Board Game, Toy Makers Use Cellphones, Collaborative Play, And Apps To Remain Relevant Among Today's Youth

Game nights were a popular activity during the economic downturn as families searched for fun ways to spend time together that didn't involve a lot of money. Walmart and Hasbro even teamed up for a co-branded multi-platform marketing effort to encourage these gatherings.

As the economy (and discretionary spending) recover, game designers and toy companies hope to remain popular among families and teens by incorporating cellphones, pop culture fads, and a more collaborative play pattern into their 2011 board game offerings. Almost half of Americans 13 and older play board games "sometimes" or "frequently," according to CivicScience research conducted for Youth Markets Alert.

Apps Go Traditional And Vice Versa

Angry Birds may have arrived via new media and an app, but the birds are now flying towards more traditional categories. Striker Entertainment, the licensing agency for "Angry Birds" in the U.S., and Mattel are introducing Angry Birds Knock on Wood, a $14.99 board game. One player draws one of 56 "mission" cards that the other player must build to recreate a pig fortress. The first player then has several chances to knock the structure down using a slingshot and "angry birds."

Auto-tune aficionado T-Pain is taking his popular iPhone I Am T-Pain app that enables users to auto-tune their voices to a tangible product in the electronic I Am T-Pain microphone. Similar to the app, users auto-tune their voices over beats and record their creations.

As app developers muscle in on traditional game makers' shelf space, game makers, in turn, are incorporating a few app or digital-friendly features. The Phone Frenzy game assumes everyone has a cellphone. Players compete against one another to complete tasks, such as finishing a song lyric, by texting friends for the answers. The first player to receive the correct response, wins the round. Game designer and analyst Nate Scheidler selects this game as his "hottest game" for 2011.

Crayola is introducing the Crayola ColorStudio in which an iMarker — serving as a marker, crayon, pen, or paintbrush — interacts with an iPad's or iPhone's interface.

Identity Games is debuting the Living Game Board in which the game board itself is a sleeve for the iPad and the device's sensors detect when the physical board game pieces move.

While many of these digital features enhance game play, not all upgrades are necessary. Monopoly, for instance, is debuting Monopoly Live that features an electronic tower that eliminates the need for dice, paper money, Chance and Community Chest cards. Similarly, classic card game Uno is also selling Uno Roboto, a version with a robot that records each player's name and uses that name to issue commands, such as forcing a player to switch cards with another player.

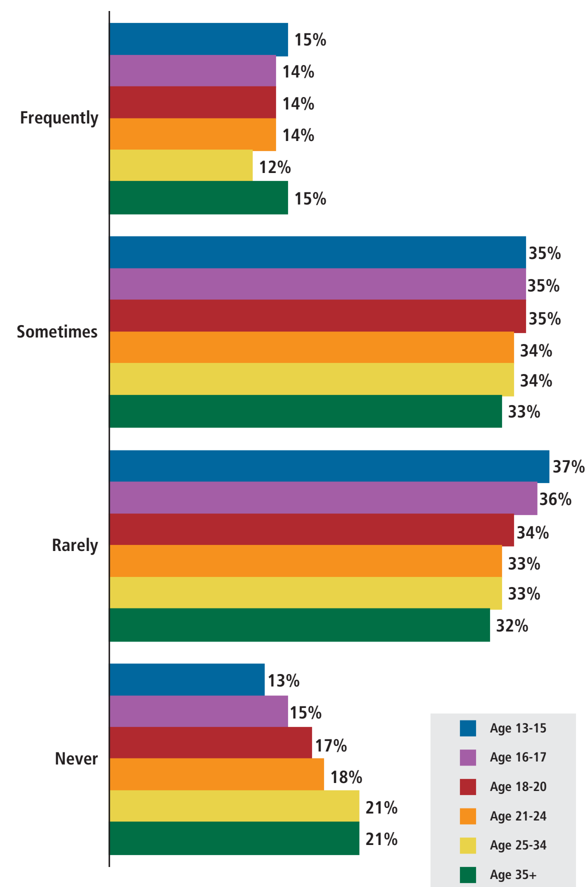
Let's All Get Along

Several game makers, including Ravensberger and Mayfair Games, are importing European titles to the U.S. in 2011, largely in the hopes of following the success of the German-born Settlers of Catan. The series in its various incarnations has sold more than 15 million copies worldwide since its 1995 debut.

These European games differ from U.S.-originated ones in that American-style games play to win, whereas European-developed titles incorporate collaborative play. It's Candyland vs. Risk. "The U.S. style of play is more cutthroat. They make moves to attack you. The [European] style of play is more passive aggressive," says Hasbro game designer Rob Daviau. "I am not building a road to cut you off, but if my road happens to make it so you cannot pass, well, sorry for the inconvenience and now I win."

Toy company Peaceable Kingdom is making its first foray into this style of play with five games for children, including Count Your Chickens!, Lost Puppies, and Mermaid Island.

HOW OFTEN PEOPLE PLAY BOARDGAMES, BY AGE



SOURCE: CivicScience exclusively for YMA

GAME-IFICATION OF AMERICA

From iPhones to family nights, game playing has never been more popular, says Hasbro's Rob Daviau. "I call it the game-ification of America. We can now play games at any time anywhere. We now turn everything into a game: brushing teeth and eating vegetables. It seems every task has some kind of reward aspect tied to it."

While the definition of what is considered a game has expanded over recent years, the play patterns of boys and girls remains constant. Boys like games with winners, losers and a clearly defined purpose; girls are less competitive and want to work together, says Daviau.

This collaborative style plays well to the current trend in so-called transmedia storytelling that invites an audience to unlock narrative elements of books, games, and TV shows across multiple media platforms.

Girls are more likely to prefer this style of play and parents tend to prefer purchasing collaborative games for younger children since they feel this play structure emphasizes teamwork and communication. Educators also are incorporating European games into classroom activities, says game designer and toy consultant Scheidler.

SOURCESS: Buffalo Games, Jonathan Leahy, Strategic Marketing Manager, 220 James E Casey Dr., Buffalo, NY 14206; 716-827-8393; jleahy@buffalogames.com; www.buffalogames.com.

CivicScience, John Dick, CEO, 3030 Penn Ave., Pittsburgh, PA 15201; 412-559-9032; jdick@civicscienceinc.com; www.civicscienceinc.com.

Hasbro, Patricia Riso, 443 Shaker Rd., East Longmeadow, MA 01028; 413-526-2307; priso@hasbro.com; www.hasbro.com.Also, Rob Daviau, Game Designer, rdaviau@hasbro.com.

Identity Games, Tijn Hoendervangers, Heemraadssingel 180, 3021 DL Rotterdam, +31-0-10-201-45-55; tijn@identitygames.nl; www.identitygames.nl.

Mattel, Juan Gutierrez, Director Worldwide Licensing, 333 Continental Blvd., #M1-1005, El Segundo, CA 90245; 310-252-3204; juan.gutierrez@mattel.com; www.mattel.com.

Mayfair Games, Bob Carty, Director Sales, 8060 St. Louis Ave., Skokie, IL 60076; 813-707-6659; mayfair@mayfairgames.com; www.mayfairgames.com.

Peaceable Kingdom, Donna Jaffe, President, 950 Gilman St., #200, Berkeley, CA 94710; 510-558-2051, x110; djaffe@pkpress.com; www.peaceablekingdom.com.

Smule (I Am T-Pain), Sunil Pareenja, 577 College Ave., Palo Alto, CA 94306; 650-521-0457; copyright@smule.com; www.smule.com.

Striker Entertainment, Russell Binder, 23371 Mulholland Dr., #289, Calabasas, CA 91364; 818-225-9355; russell@strikerent.com; www.strikerentertainment.com.

Top Characters Kids Want To See More Of In Licensing And Promotions

Wolverine, from the animated *X-Men* series, tops the list of characters children 6-12 most want to see on games, toys, apparel, or in a book, according to E-Poll. Other characters ripe for brand extensions include the duo Hoops & Yoyo from Hallmark's greeting cards and Animal Crossing Characters from the Nintendo videogame.

E-Poll also tracks characters that possess a low overall awareness level — between 10%-25% — among kids 6-12, but elicit strong support among those that do know of the property. To that end, Toothless from *How To Train Your Dragon* and Hallmark's Hoops & Yoyo score the highest among a small but loyal group of children who want to see more of these characters.

These findings also demonstrate that characters ripe for licensing span sources, including greeting cards, toys, and videogames, rather than primarily come from TV and movies.

CHARACTERS CHILDREN 6-12 MOST WANT TO SEE ON LICENSED PRODUCTS

CHARACTER	SOURCE
1. Wolverine	X-Men (animated)
2. Hoops & Yoyo	Hallmark greeting cards
3. Animal Crossing Characters	Nintendo Animal Crossing videogame
4. Ghost Rider	Ghost Rider animated comic book
5. Starfy	Nintendo Starfy videogame
6. Felix the Cat	Felix the Cat TV show
7. Jacob Black	Twilight movie franchise
8. Jack Skellington	Nightmare Before Christmas movie
9. Green Latern	Green Latern comic book (animated)
10. Iron Man	Iron Man live-action movie

SOURCE: e-Poll

CHARACTERS WITH A LOW OVERALL AWARENESS LEVEL AMONG 6-12-YEAR-OLDS, BUT HIGH APPEAL

CHARACTER	SOURCE
1. Toothless	How To Train Your Dragon movie
2. Hoops & Yoyo	Hallmark greeting cards
3. Jacob Black	Twilight movie franchise
4. Hiccup	How To Train Your Dragon movie
5. Sonny Munroe	Sonny With A Chance TV show
6. Tony Stark	Iron Man live-action movie
7. Animal Crossing characters	Nintendo Animal Crossing videogame
8. Samus	Nintendo Metroid videogame
9. Mata Nui	Lego Bionicles toy
10. Ghost Rider	Ghost Rider animated comic book

SOURCE: e-Poll

SOURCE: E-Poll, Michelle Waxman, SVP Corporate Development, 16133 Ventura Blvd., #905, Encino, CA 91436; 818-995-4960, x23; mwaxman@epoll.com; www.epollresearch.com.

Characters Kids Most Want To See In Videogames And TV Shows

Toothless, from DreamWorks Animation's movie *How To Train Your Dragon*, tops the list of characters children 6-12 who play videogames at least two times a week want to see in a videogame (excluding characters already in videogames), according to E-Poll (the findings are similar to those reported in a YMA June 1, 2010, article on the most desired characters for brand extensions).

While survey participants skewed modestly male (60% boys, 40% girls), the characters chosen were almost exclusively male, including Logan/Wolverine from *X-Men* and Albus Dumbledore from *Harry Potter*. Two *Transformers* robots also placed in the top 10.

Toothless also tops the list as the character kids are most interested in seeing in a TV show (excluding characters originating from TV). *How to Train Your Dragon* trainer Hiccup, Scrat from *Ice Age*, and *Shrek*'s Donkey also rank as characters kids wish to see on TV.

CHARACTERS CHILDREN 6-12 MOST WANT TO SEE IN VIDEOGAMES, 2011

CHARACTER	SOURCE
1. Toothless	*How To Train Your Dragon* movie
2. Logan	*Wolverine* comic series, movie
3. X-Men	Movie, comic book series
4. Albus Dumbledore	*Harry Potter* book series
5. Lego Anakin Skywalker	Toy based on movie
6. Megatron	*Transformers* movie and toy
7. Phineas	Disney series *Phineas & Ferb*
8. Avatar	From same name movie
9. Marvel's "The Avengers"	Marvel comics, 2012 movie
10. Autobots	*Transformers* movie and toy

SOURCE: E-Poll

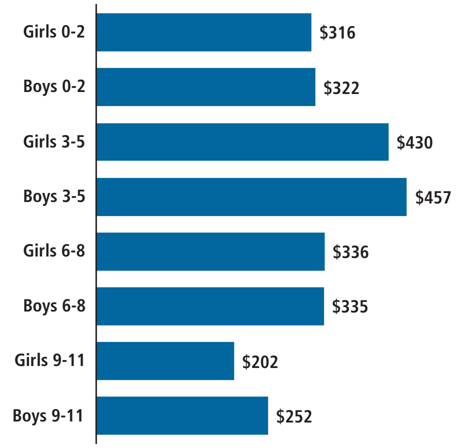
CHARACTERS CHILDREN 6-12 MOST WANT TO SEE IN TV SHOW, 2011

CHARACTER	SOURCE
1. Toothless	DreamWork Animation's *How To Train Your Dragon*
2. Scrat	20th Century Fox's *Ice Age*
3. Hiccup	DreamWork Animation's *How To Train Your Dragon*
4. Minions	DreamWork Animation's *Despicable Me*
5. Donkey	DreamWork Animation's *Shrek*
6. Bolt	Disney's *Bolt*
7. Aslan the Lion	Disney's *The Lion, The Witch, And The Wardrobe*
8. Madagascar Penguins	*Madagascar* movie
9. Po	DreamWorks Animation's *Kung Fu Panda*
10. Dug	Disney's *Up*

SOURCE: E-Poll

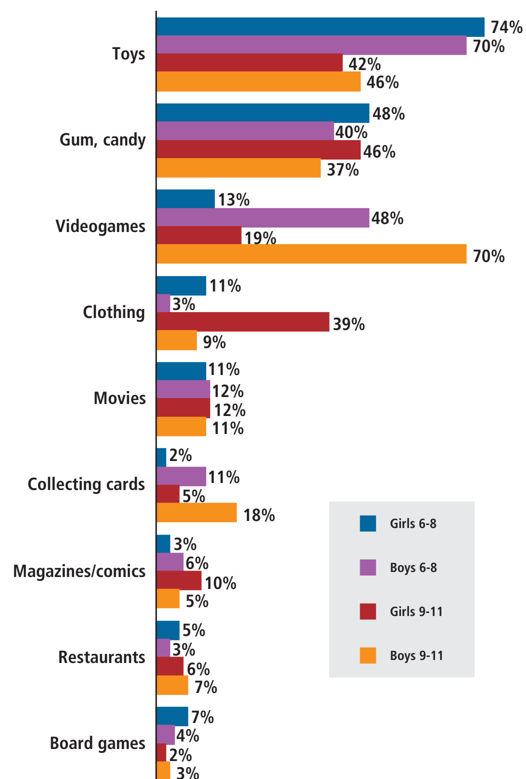
SOURCE: E-Poll, Michelle Waxman, SVP Corporate Development, 16133 Ventura Blvd., #905, Encino, CA 91436; 818-995-4960, x23; mwaxman@epoll.com; www.epollresearch.com.

AVERAGE AMOUNT PARENTS SPEND ON TOYS FOR THEIR CHILDREN EACH YEAR, BY AGE OF CHILD



SOURCE: NPD Group

PRODUCTS 6-11-YEAR-OLDS PURCHASE WITH THEIR ALLOWANCE, BY AGE GROUP, GENDER



SOURCE: Mintel

Online Toy Exchanges Pop Up To Sell Second-Hand Toys; Each Follows A Different Business Model

Toys are an essential component of childhood. Parents spend $300-$400 each year buying them for their children, according to NPD Group. And children themselves direct the largest proportion of their allowance — averaging $5-$10 a week — to toy purchases, according to Mintel.

Now, in addition to local independent efforts a la Craigslist and the Freecycle Network, several companies are establishing national online toy exchanges to capitalize on parents' desire for recycled toys (or to save money).

While the end result — second-hand toys delivered to a family's doorstep — is similar regardless of the service, each site operates a slightly different business model.

Netflix Of Toys

Toygaroo resembles Netflix and boasts billionaire and media mogul Mark Cuban as an investor. Parents select a plan, such as exchanging a toy in 30- or 60- day intervals, add items to the "toy pouch" queue, and FedEx delivers the item free of charge.

Toygaroo's least expensive plan costs $35.99 a month for a shipment every other month, with the average shipment costing $120. Parents also have the option of purchasing a toy instead of returning it. This service positions itself as a more upscale version of the toy swap, more akin to Gilt Groupe, than the typical mom-and-pop swap.

By contrast, ThredUp, which started as a clothing swap in spring 2009, serves as a surprise-type of an exchange in that members don't know exactly what they will be receiving. They select a "toy box" based on a short online description and pay $5 plus shipping to receive it. There are around 3,600 current boxes offered on the site, featuring desired brands such as PlayStation, Wii videogames, and LeapFrog's Leap Pads.

Members must also abide by the "golden rule" and send boxes filled with toys or clothing in order to continue to use the service. "The site's biggest challenge is skepticism around anonymity," says ThredUp's Karen Fein. "Swapping with strangers sounds like a risky concept."

While the site does not accept banner advertising, it is exploring "interactive ways to promote brands," says Fein. To that end, ThredUp recently launched Golden Threds, which are limited-edition boxes filled with new products offered by high end specialty retailers. These boxes are kind of like Easter eggs for ThredUp members in that they are a rare treat among second-hand goods. One recent promotion featured a Willy-Wonka styled treasure hunt.

ToySwap.com hues closely to eBay's business model in that the site simply serves as a conduit to the buyer and seller. The website lists toys by category, with the most popular searches for Barbie, Star Wars, and Videogame. It features primarily local Illinois advertisers, such as Arctic Air, Inc. and Jack & Jackie's Dino Jump.

SOURCES: Mintel, Jennifer Ballard, 351 W. Hubbard St., 8th Fl., Chicago, IL 60610; 312-628-7946, jballard@mintel.com; www.mintel.com.

NPD Group, David Riley, Director, 900 W. Shore Rd., Port Washington, NY 11050; 516-625-2277; david_riley@npd.com; www.npd.com.

ThredUp, Karen Fein, 59 Grant Ave., 2nd Fl., San Francisco, CA 94108, 518-265-2688; support@thredup.com; www.thredup.com.

Toygaroo, Nikki Pope, 3917 Fountain Ave., Los Angeles, CA 90029; 323-801-8180; nikki@toygaroo.com; www.toygaroo.com.

ToySwap, Toy Box Connection, Michelle Maxia, CEO, 13726 Woodridge, Orland Park, IL 60462; 708-691-2715, www.toyswap.com.

Disney Princesses Rank As Top Kids' License

Disney Princess is the best-selling licensed property for U.S. kids under age 15, followed by Dora the Explorer, Star Wars, and Barbie, according to the NPD Group.

By category, Disney Princess ranks as the most popular apparel and accessories license; Barbie is the top toy license; and Super Mario Brothers is the top license for videogames and PC software.

Purchases of licensed children's products tend to follow play patterns and interests. For ages 3-5 and 6-8, the most frequently purchased categories are toys/boardgames and apparel/accessories. By the time kids get to be 9-11, there's a gender split: the top licensed categories among tween girls are apparel/accessories and footwear; among tween boys, they're videogames and console systems.

The majority of licensed products are bought by adults under age 45 (presumably parents). Some 34% of licensed toys, for instance, are purchased by people ages 18-34 and 25% by those ages 35-44. Only 10% of toys purchased are bought by those over 65. The nag factor also doesn't seem as powerful for licensed products. Only 25% of licensed apparel/accessories and videogames sold are requested specifically by children. Kids have more sway over toys/boardgames and consumer electronics purchases. Some 66% of licensed consumer electronics purchases are specifically requested by kids.

Global Toys Sales Reach $83 Billion

Total global toy sales grew 5% in 2010 to reach $83.3 billion, according to NPD data. The U.S. remains the largest market with $22 billion in sales, followed by Japan, China, the UK, and France. These top five countries account for 50% of all global sales. Emerging markets of Brazil, Russian, India, and China grew 13% year-over-year.

TOP LICENSED CHILDREN'S PROPERTIES, BY TOTAL SALES

GIRLS 3-5	GIRLS 6-8	GIRLS 9-11
1. Disney Princess	1. Disney Princess	1. Hannah Montana
2. Dora the Explorer	2. Barbie	2. Disney Princess
3. Barbie	3. Hannah Montana	3. Super Mario Bros.
4. Disney Fairies	4. Disney Fairies	4. iCarly
5. Toy Story	5. Mario Kart	5. Barbie

BOYS 3-5	BOYS 6-8
1. Toy Story	1. Star Wars
2. Cars (the movie)	2. Toy Story
3. Spider-Man	3. Super Mario Bros.
4. Star Wars	4. Mario Kart
5. SpongeBob	5. Spider-Man

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. Also, Jane Zimmy, President, EuroToys, 011-33-5578-2525; jane.zimmy@npd.com.

Most Toy Purchases Are Planned

Four in 10 toy purchasers (42%) are looking for a specific toy and visit different retailers until they find it; 9% look online, according to the NPD Group. Two in 10 (22%) substitute another toy rather than visit another store. Building sets and youth electronics are the two toy categories most likely to be planned toy purchases.

The 38% of toy purchases that are unplanned are driven by child requests. Parents typically weigh whether to actually purchase the toy based on its price.

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.

Nursery, Clothing Top 2010 Kid Product Recalls

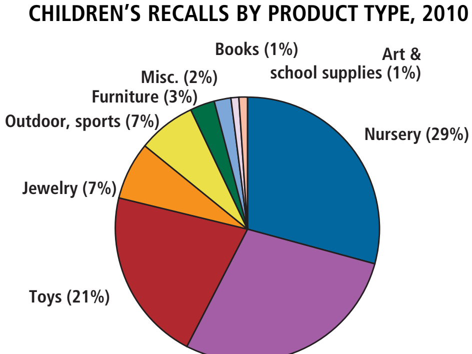
Nearly half of the products (45%) recalled by the U.S. Consumer Product Safety Commission in 2010 were children's products, according to the advocacy group Kids In Danger. Nursery products were the most-recalled category at 29%, followed by clothing (mostly for drawstrings) at 28%. Nursery products and clothing surpassed toys in 2010 as the leading recalled product types. Toys had been the most recalled category from 2001-2008, with toy recalls declining from 41% of the total in 2008 to 21% in 2010.

There were 11 recalls of at least one million units, with McDonald's recall of 12 million Shrek glasses tainted with cadmium as the largest single recall. Fisher-Price had five different recalls, Williams Sonoma brands — Pottery Barn Kids, Williams-Sonoma, and PBTeen — had five recalls. Graco and Step2 had three separate recalls each.

One in four children's product recalls (24%) involved injuries prior to the recall, up from 17% in 2009. The government imposed a total $2.7 million in fines for companies that violated safety regulations, mostly for excessive lead in toys and drawstrings in children's clothing.

SOURCE: "Moving Towards Safety 2010," Kids In Danger, Nancy Cowles, Executive Director, 116 W. Illinois St., #5E, Chicago, IL 60654, 312-595-0649; nancy@kidsindanger.org; www.kidsindanger.org.

CHILDREN'S RECALLS BY PRODUCT TYPE, 2010



SOURCE: Kids In Danger

Toy Sales At $21.87B In 2010

Retail sales of traditional toys increased 2% to $21.87 billion in 2010 from $21.46 billion in 2009, according to the NPD Group. Nearly half of these sales ($10.2 billion) came between October and December.

Building sets (23%) and plush (18%) were the two categories with the strongest rates of growth, followed by outdoor and sports toys (9%), dolls and infant/preschool (6% each). Youth electronics (-22%), action figures/accessories (-15%) and games/puzzles (-9%) experienced the largest sales declines year-over-year.

Toy purchases conducted online increased 22% between 2009 and 2010, while food/drug chains (6%) and toy stores (4%) also experienced growth. Department/major chains (-11%) and mass merchant/discount (-2%) experienced the largest declines year-over-year.

The top toy properties, based on total dollar sales, included Barbie, Crayola, Nerf, Star Wars, and Toy Story. Licensed toys comprised 25% of total sales in 2010, the same percentage as in 2009. The top 2010 licensed properties, based on total dollar sales, included Cars, Toy Story, Disney Princess, Thomas and Friends, and Star Wars.

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.

factoids

- Young women aged 16-25 (71%) are more likely than young men the same age (66%) to describe themselves as **creative**. *(Lemelson-MIT Program; phone: 617-258-0632)*
- Two thirds of **2-5 year olds** (67%) know how to operate a computer mouse, 61% are able to play videogames, and 25% can make mobile phone calls; there is no gender difference in the tech skills of young children. *(AVG Technologies; phone: 415-299-2945)*
- **Kids aged 6-11** are most likely to find out about new things from their classmates (84%) and from ads on TV (81%), followed distantly by an older sibling (40%). *(Mintel; phone: 312-628-7946)*
- Teens are most likely to name people they know as **role models**. When asked whom they admire most, other than their parents, 37% cite other relatives, 11% teachers or coaches, 9% friends, and 6% religious leaders. *(The Barna Group; phone: 805-639-0000)*
- On a typical day, **children and teens** (ages 8-18) spend an hour and 45 minutes doing physical activity and seven hours and 38 minutes using media. *(Kaiser Family Foundation; phone: 650-854-9400)*
- 84% of high school students who get **good grades** (As and Bs) say their homes smell pleasant (clean, lemony, etc.); 34% of students who earn Cs or below say their homes smell unpleasant (urine, mold, etc.). *(Smell & Taste Treatment and Research Foundation for The Clorox Company; phone: 312-938-1047)*
- Four in five teens who own cell phones **sleep with the phones** on or near their beds. *(Pew Research Center; phone: 202-419-4300)*
- **Teen drivers** run 40% more yellow lights when they know their friends are watching. *(Temple University; phone: 215-204-7485)*
- A quarter of 9-17-year-olds (25%) believe that sending and receiving **text messages** to/from friends counts as reading. *(Scholastic; phone: 212-343-6100)*
- Nearly four in 10 **college students** (38%) say they couldn't go more than 10 minutes without checking their tech device of choice (smartphone, tablet, etc.). *(Coursesmart; phone: 650-295-3830)*
- More than eight in 10 parents (84%) take their children to **fast-food** restaurants in a given week. *(Yale University Rudd Center for Food Policy and Obesity; phone: 203-432-6700)*
- An estimated 41 million children ages 5-14 went **trick-or-treating** in October 2010. *(U.S. Census Bureau; phone: 301-763-3030)*
- The average U.S. **child** carries a backpack/book bag with 22% of his or her body weight in it. *(American Chiropractic Association; phone: 703-276-8800)*
- Four in 10 parents (41%) pay for all the costs associated with their **teens' driving**; 6% say their teens pay themselves. *(Nationwide Insurance; phone: 614-249-7705)*
- More than four in 10 teens (43%) are worried about **aging**. (O: The Oprah Magazine*; phone: 312-633-1000)*
- Nine in 10 teen girls (91%) who wear **eyeliner** use the pencil form. *(Mintel; phone: 212-796-5710)*

index **boldface** numbers refer to figures and tables

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