



Youth and Young Adult Research Report

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Who is a YAYA?

- YAYAs are approximately 18-24 years old.
- Unlike other generational groups such as Baby Boomers and Gen Xers, YAYAs don't stay YAYAs their whole lives. A person is only a YAYA while they are between 18 and 24 years of age.
- The U.S. Census Bureau estimates the YAYA population to be over 29 million.¹
- YAYAs account for 9.9 percent of the U.S. population.¹
- Children of the baby boomers are sometimes referred to as the echo boomers.
- YAYAs have been known to exhibit "negative" traits such as:
 - o impatient
 - o skeptical
 - o blunt
 - o expressive
 - o image-driven
 - o inexperienced
- YAYAs have been known to exhibit "positive" traits such as:
 - o adaptable
 - o technologically savvy
 - o learning-oriented
 - o an efficient multi-tasker
 - o tolerant (especially in terms of diversity)
- Currently, YAYAs are also referred to as:
 - o Generation Y
 - o Generation WHY
 - o Generation Next
 - o Nexers



- o Millennials
- o The Digital Generation
- o Boomlets
- o Baby Busters
- o The iGeneration
- o The Net Generation
- o Netizens

Gender:

- 50.5 percent are male²⁰
- 49.5 percent are female²⁰

Race:

- 31 percent of YAYAs identify themselves as non-white.²⁰
- YAYAs are the most ethnically diverse generation ever, according to the racial breakdown of YAYAs from the 2000 census¹
 - o White = 18,761,162
 - o Black = 3,804,437
 - o Hispanic = 4,743,880
 - o American Indian/Alaska Native = 287,785
 - o Asian = 1,133,431
 - o Native Hawaiian/Other Pacific Islander = 50,708
 - o Other = 1,803,589
 - o Two or more races = 798,542
- YAYAs are used to working with people who belong to a different ethnic group.²¹

Religion:

- Young adults (18-34) are less likely to identify themselves as being “religious” or “somewhat religious” than senior citizens and all adults.²
 - o Young Adults
 - 27 percent identify themselves as being “religious.”
 - 43 percent identify themselves as “somewhat religious.”
 - 9 percent identify themselves as “somewhat secular.”
 - 14 percent identify themselves as “secular.”
 - 7 percent don’t know.



YAYA Demographics





Region:



- The greatest concentration of the YAYA population is in the Southeast.¹



Education:



- 18 percent have not graduated high school.¹



- 33.9 percent have graduated high school.¹



- 39.5 percent have an associate's degree or have attended some college.¹



- 8.6 percent have a bachelor's degree or higher.¹



Economic Status:



- 8.3 percent of YAYAs own homes.¹



- 6.2 million people age 18-34 make over \$100,000.¹



- People age 15-24 have a purchasing power exceeding \$350 billion.



Population Projections



- College-educated and affluent YAYAs are delaying childbearing longer than those with lower-income.⁴



- The average age for YAYAs to have their first child is 27, but many of the lower-income YAYAs have been parents since their teenage years.⁴



- The more affluent YAYAs are waiting to have children closer to 30, and many are spending time experiencing freedom before settling down.⁴



Trends in Living Arrangements:



- 1 in 3 female YAYAs is married.⁴



- Fewer YAYAs now fit the stereotype of the “boomerang generation;” those who are single and living at home with parents well into their twenties.



- YAYAs may be plagued by “Helicopter Parents;” parents who take care of everything for their children, making it more difficult for them to be taken seriously.



- The average number of square feet for homes in the market nationally is at 2,300 (up from 980 in 1950), making the prospect of buying for YAYAs much more expensive and less feasible.²⁵



- Rising trends include multi-family housing such as condos and multiplexes.²⁵



- “Green developments,” sustainable buildings within walking distance of necessities, are another growing trend because YAYAs are largely urban.²⁵



YAYAs & Politics

- YAYAs are becoming a new political force vital to candidates' success.⁵
- 10 million voters age 18-29 voted in the 2006 mid-term elections.⁵
 - Only 8 million voted in the 2002 mid-term elections.
- In the 2000 Presidential Election, YAYAs had a voter turnout of 42 percent.⁵
- YAYA voter turnout increased to 54 percent in 2004.⁵
 - This was the biggest increase of any age group.
- Reasons for this increased turnout:
 - The Internet offers YAYAs the chance to interactively mobilize supporters, organize rallies, and exchange candidate information.⁵
 - YAYAs feel passionately about the War in Iraq, global warming, and national security.⁵

US Adults Who Use Online Video for Campaign Information, by Age, December 2007 (% of respondents)

	18-29	30-39	40-49	50-64	65+	Total
Have watched candidate speeches/announcements	22%	17%	13%	10%	5%	13%
Have watched interviews with candidates	23%	18%	11%	9%	3%	13%
Have watched campaign commercials	25%	9%	10%	10%	4%	12%
Have watched candidate debates	20%	16%	10%	9%	2%	12%
Any of the above	41%	28%	20%	21%	7%	24%

Source: Pew Research Center for the People and the Press and Pew Internet & American Life Project, "Internet's Broader Role in Campaign 2008," January 11, 2008

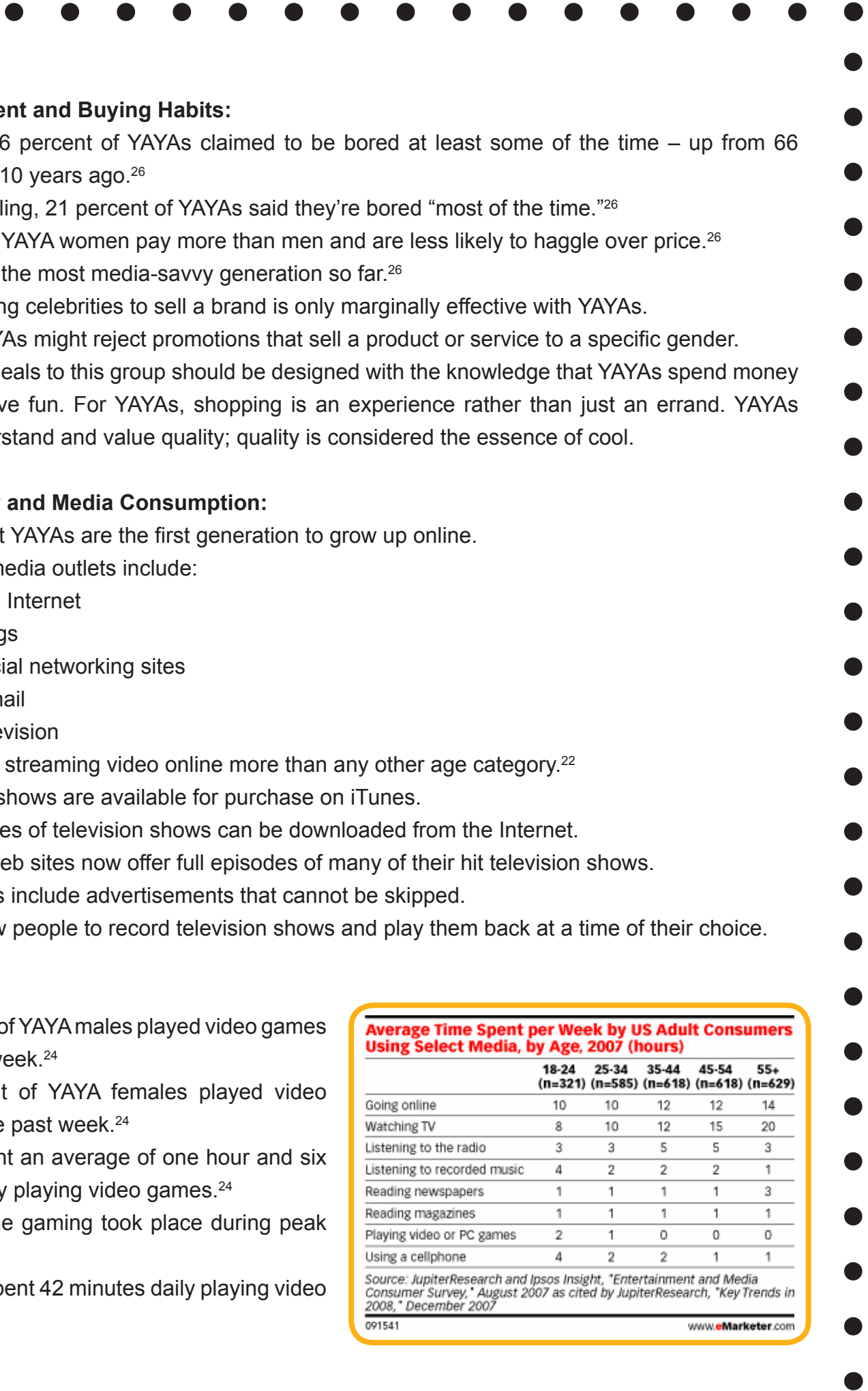
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YAYA Habits

Dining Habits:

- YAYAs are very busy, so they often go out to eat.
- YAYAs are attracted to quick service restaurants that meet several criteria:⁸
 - Quick service
 - Portable foods
 - Inexpensive pricing
 - Menu variety
- YAYAs are constantly active, and time is of the essence.
- YAYAs are adventurous.
 - Because YAYAs are always on the go, they tend to eat later.
 - Enjoy extended hours of availability
 - Over 50 percent of YAYAs eat late night fast food.⁷
- YAYAs want more for their dollar.
 - Larger portions are key



Entertainment and Buying Habits:

- In 2006, 76 percent of YAYAs claimed to be bored at least some of the time – up from 66 percent just 10 years ago.²⁶
- More troubling, 21 percent of YAYAs said they're bored "most of the time."²⁶
- As buyers, YAYA women pay more than men and are less likely to haggle over price.²⁶
- YAYAs are the most media-savvy generation so far.²⁶
 - o Using celebrities to sell a brand is only marginally effective with YAYAs.
 - o YAYAs might reject promotions that sell a product or service to a specific gender.
 - o Appeals to this group should be designed with the knowledge that YAYAs spend money to have fun. For YAYAs, shopping is an experience rather than just an errand. YAYAs understand and value quality; quality is considered the essence of cool.

Technology and Media Consumption:

- The current YAYAs are the first generation to grow up online.
- Available media outlets include:
 - o The Internet
 - o Blogs
 - o Social networking sites
 - o E-mail
 - o Television
- YAYAs use streaming video online more than any other age category.²²
- Television shows are available for purchase on iTunes.
- Full episodes of television shows can be downloaded from the Internet.
- Network Web sites now offer full episodes of many of their hit television shows.
- Those sites include advertisements that cannot be skipped.
- DVRs allow people to record television shows and play them back at a time of their choice.

Gaming

- 80 percent of YAYA males played video games in the past week.²⁴
- 55 percent of YAYA females played video games in the past week.²⁴
- Males spent an average of one hour and six minutes daily playing video games.²⁴
- Much of the gaming took place during peak TV hours.²⁴
- Females spent 42 minutes daily playing video games.²⁴

Average Time Spent per Week by US Adult Consumers Using Select Media, by Age, 2007 (hours)

	18-24 (n=321)	25-34 (n=585)	35-44 (n=618)	45-54 (n=618)	55+ (n=629)
Going online	10	10	12	12	14
Watching TV	8	10	12	15	20
Listening to the radio	3	3	5	5	3
Listening to recorded music	4	2	2	2	1
Reading newspapers	1	1	1	1	3
Reading magazines	1	1	1	1	1
Playing video or PC games	2	1	0	0	0
Using a cellphone	4	2	2	1	1

Source: JupiterResearch and Ipsos Insight, "Entertainment and Media Consumer Survey," August 2007 as cited by JupiterResearch, "Key Trends in 2008," December 2007

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YAYAs and Cell Phones

- Nearly 16 percent of homes have no landlines.³
- 32.3 percent of YAYAs live in a household with a cell phone, but no landline.⁹
- 31.5 percent of African Americans YAYAs are cell-only.⁹
- 30.5 percent of Hispanic YAYAs are cell-only.⁹
- 33.2 percent of all other YAYAs are cell-only.⁹
- 81 percent of YAYAs have a cell phone.⁹
- 38 percent of YAYAs pay their own cell phone bill.¹⁰
- 71 percent of YAYAs admit to talking on the phone while driving.¹¹
- 24 percent of YAYAs admit to text messaging while driving.¹¹
- 1 percent of YAYAs admit to e-mailing while driving.¹¹
- 51 percent of YAYAs send and receive at least 6 text messages a day.¹²
- 26 percent of female YAYAs said the cell phone was the most important technological product in their lives.¹²
- 57 percent of YAYAs have either sent or received an invitation to a date via message.¹²
- 78 percent of YAYAs make spontaneous social arrangements via cell phone.¹²
- 55 percent of female YAYAs reported using their cell phone in public situations to deter people from approaching them.¹²
- As the technological capabilities of cell phones continue to improve, advertisers see that cell phones can be the ultimate link in multi-platform campaigns.
- i.e. iPhone and other media-oriented phones
- 25 percent of YAYAs say “trendiness” is important when selecting a phone.¹³
- Only 10 percent of adults ages 35+ agree.
- In 2005, YAYAs averaged 126 total text messages (sent and received) per month.¹⁴
- YAYAs more than doubled 25- to 36-year-olds, who averaged 56 total texts.
- Data services include technologies such as the wireless web, video, text messaging, game downloads, instant messaging and e-mail. These options are transforming the mobile phone into an always-with-you, always-on communication-information-entertainment device.²³
- Satellite radio offers a greater diversity of programming channels in a mostly commercial-free environment.⁶
- Recently, brief commercials have been introduced to satellite radio.⁶
- 18- to 34-year-olds are satellite radio providers’ number one age group for current subscribers as well as for those planning on buying in the next six months.⁶
- 5.6 percent of YAYAs have satellite radio, 4.4 percent plan to buy it in the next six months and 28.5 percent plan to buy it some day.⁶



YAYAs Online

Social Networking Web Sites:

- People are increasingly utilizing the Internet as a means of conversation rather than simply a medium for information.¹⁵
- Two popular social networking sites saw rapidly increasing activity from June 2006 to June 2007.¹⁵
 - o MySpace improved from 66.4 to 114 million unique visitors, an increase of 72 percent.
 - o Facebook went from 14 to 52.2 million unique visitors, an increase of 270 percent.
 - o Special interest Web sites are becoming increasingly popular.

Select Weekly Online Activities* of US Internet Users, by Age, February-March 2007 (% of respondents in each group)

	Millennials (13-24)	Generation X (25-41)	Baby boomers (42-60)	Matures (61-75)	Total
Watching and reading personal content created by others	71%	56%	40%	36%	51%
Searching, downloading and listening to music	78%	57%	36%	17%	50%
Visiting online gaming sites where you can actually play games	66%	51%	39%	38%	49%
Maintaining and sharing photographs	53%	52%	38%	43%	46%
Visiting TV show Web sites	48%	52%	43%	34%	46%
Conducting job searches	31%	52%	43%	17%	39%
Participating in auction sites	30%	49%	37%	32%	38%
Reading/posting on message boards	51%	43%	29%	22%	38%
Seeking financial/investment information	20%	42%	42%	41%	38%
Socializing	62%	41%	25%	18%	37%
Reading blogs	55%	42%	27%	16%	36%
Watching YouTube or other video streaming sites	62%	41%	24%	11%	36%
Creating personal content	58%	41%	19%	16%	34%
Participating in a discussion board or forum	34%	33%	24%	19%	28%
Watching TV shows online	34%	28%	19%	9%	24%
Maintaining your own personal Web site	36%	27%	14%	7%	22%
Keeping a Web log (blog)	35%	25%	7%	1%	18%
Using a computer video camera	20%	19%	14%	8%	16%
Using computer's microphone to conduct audio chats or Internet phone calls	15%	15%	10%	6%	13%

Note: n=2,211; *frequent or occasional
 Source: Deloitte & Touche USA LLP, "The Future of Media: Profiting from Generational Differences" provided to eMarketer, April 16, 2007

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- o Users interact with others sharing the same hobbies and interests.
- o Friendster has over 54 million users, most of which are in their 20s and 30s and are looking for new friendships and relationships.²⁷
- o Frequent visitors to networking sites are more likely than average Internet users to visit retail sites offering books, music, apparel, and electronics.¹⁶
- o Over 95 percent of heavy visitors of social networks visited retail sites in August 2007.¹⁶
 - Only 80 percent of all Internet users visited retail sites in that time.¹⁶
 - Of 61.2 million unique visitors to apparel sites in August 2007, 15.2 million were heavy social networkers.¹⁶
 - In 2007, \$900 million was spent advertising on social networking sites, a \$550 million increase from the 2006 total of \$350 million.¹⁵
 - By 2010, advertisers will spend over \$2 billion annually on social networking sites.¹⁵
 - Social networking users take the form of many different personalities:
 - o "Netrepeneurs" utilize sites to make

money.

- o “Connectors” enjoy sharing information and links.
- o “Transumers” join sites to meet people with similar interests.
- o “Collaborators” create and promote events online.
- o “Scene Breakers” look for new places interact.
- o “Essentialists” visit sites to stay connected with friends and family. (The majority of social networking site users are essentialists.)

Frequency with which US Adult Internet Users Visit Social Networking Sites, by Age, September 2007 (% of respondents)

	18-34	35-44	45-54	55+
Daily	25%	12%	10%	2%
Every few days	26%	17%	6%	4%
Once every 1-2 weeks	11%	12%	10%	2%
Once every 3-4 weeks	5%	3%	5%	2%
Less than once a month	9%	18%	13%	12%
Never	24%	39%	57%	78%

Note: n=933 ages 18+
Source: Dynamic Logic, "AdReaction 2007," provided to eMarketer, November 2007

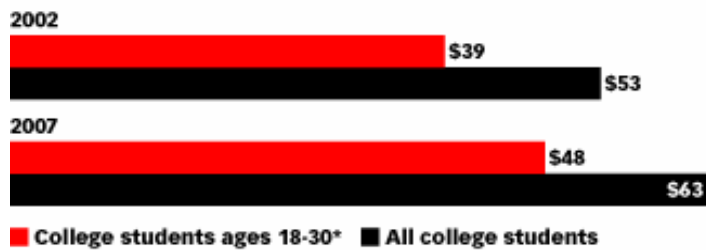
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Influence of College Segment:

- There were 18 million US college students in the fall of 2007.²⁸
- 95 percent of YAYA college students use the Internet at least once a month.²⁸
- More than 80 percent of YAYA college students use a social networking site regularly.²⁸
- 61 percent of YAYA college students who use social networking site say they interact with people they have never met in person.²⁸

Discretionary Spending of US College Students, by Age, 2002 & 2007 (billions)



Note: *n=1,592
Source: Alloy Media + Marketing, "Alloy College Explorer" conducted by Harris Interactive, Inc., August 2007

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- Nearly half of undergraduate YAYAs attend a community college.²⁸
- 75.8 percent of YAYA college students own a laptop.²⁸
- YAYA college students spend an average of 20 minutes per day sending and receiving text messages.²⁸
- 41 percent of YAYA college students own an MP3 player and 85 of them percent use it daily.²⁸
- YAYA college students ranked the following (in order) as the most socially

responsible brands: Ben & Jerry’s, Wal-Mart, Coca Cola, Newman’s Own, Target, Yoplait, Whole Foods, Burt’s Bees, Starbucks and Kashi.²⁹

- YAYA college students ranked the most important causes for a brand to be involved in. They are (in order): fair-labor practices, eco-friendly or green practices and donating to a charity or cause.²⁹

Influence of Urban Youth:

- There are 24 million 15- to 29-year-old urban youths, with \$500 billion in purchasing power.³⁰
- These YAYAs are seen as the trendsetters among youth.³⁰
- Most of the YAYAs in this segment are either black or Hispanic youths.³⁰
- Urban youth YAYAs are highly brand conscious.³⁰
- Urban youth YAYAs spend more on clothes than their suburban counterparts.³⁰
- Urban black YAYAs are much more brand loyal than the average person.³⁰
- Average discretionary spending for urban youth YAYAs per month is: \$74 on clothing, accessories and shoes; \$45 on technology; \$38 on entertainment; \$30 on cell phones; \$23 on sneakers; and \$15 on music.³⁰
- Urban youth YAYAs spend 45 percent more on clothing and accessories than other YAYAs.³⁰
- Urban youth YAYAs spend 2.5 times more on sneakers each month than other YAYAs.³⁰
- 54 percent of urban YAYAs own a laptop.³⁰

How Marketers Target YAYAs:

- Word of mouth is the number one way YAYAs like to learn about new products and services.³²
- TV advertising ranked second, although it was a more powerful driver for females than males.³²
- The most effective marketing seems to come from the coverage that appears to be the most organic, viral and non-commercial in nature.³

How Mobile Marketers Target YAYAs:

- 78 million Americans received mobile advertising in the final 3 months of 2007.¹⁷
- Sweepstakes and voting campaign messages are the most widely used forms of mobile marketing.¹⁶
- Obtaining votes used in polling via text message is significantly less expensive than through other mediums.¹⁷
 - o Text messages cost as little as \$1.50 per vote.
- Direct mail cost \$67 per vote.
- Door-to-door cost \$30 per vote.
- Telemarketing cost \$20 per vote.

Social Media Marketing Tactics that US Marketing Professionals Plan to Implement, by Timeframe, Q3 2007 (% of respondents)

	3 months	6 months	12 months	Unspecified	Total
User-generated reviews	6.0%	8.6%	9.5%	3.4%	27.6%
Blogs	4.3%	7.8%	9.5%	3.4%	25.0%
User-generated content	6.0%	6.0%	6.9%	3.4%	22.4%
Social networks	3.4%	6.0%	8.6%	2.6%	20.7%
RSS feeds	3.4%	3.4%	11.2%	1.7%	19.8%
Podcasts	0.9%	1.7%	12.1%	0.9%	15.5%
Online video advertising	2.6%	3.4%	4.3%	4.3%	14.7%
Flash/Ajax	5.2%	3.4%	2.6%	1.7%	12.9%
Wikis	2.6%	0.9%	3.4%	1.7%	8.6%
Virtual worlds	0.0%	0.0%	6.9%	1.7%	8.6%
None of the above	-	-	-	-	16.4%

Note: n=116; numbers do not add up to totals due to rounding
Source: Coremetrics, "2nd Annual 'Face of the New Marketer,'" provided to eMarketer; eMarketer calculations, October 30, 2007

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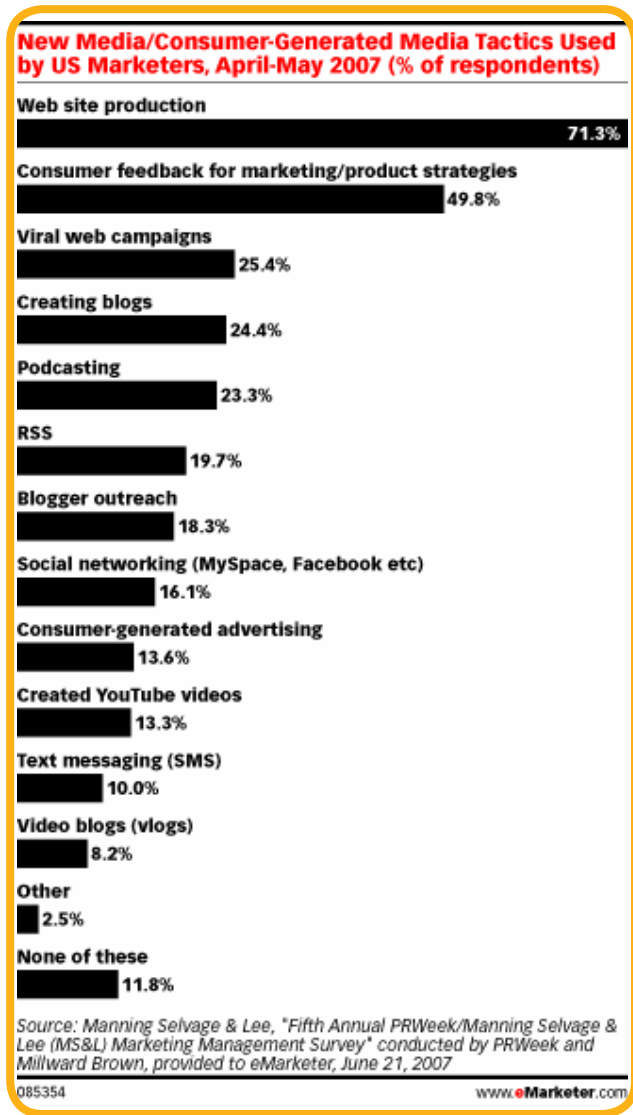


- 1 in 3 mobile subscribers aged 18-34 have participated in a television or radio poll.¹⁸
- 1 in 3 mobile phones has the ability to play videos.¹⁸
- Ethnic groups, mainly Latinos and African Americans, express more interest in mobile marketing than Caucasians.¹⁶
- Those interested in mobile marketing want to receive relevant information, coupons, and rewards from marketers.¹⁶
- Young adults and teens text message more often than any other demographic.¹⁶

- 65 percent of those age 18-29 text message.¹⁹
- Sponsored information placed in mobile marketing text messages includes: Celebrity gossip, local news, weather, sports scores, movie times, political polls, screensavers, flight information, traffic reports
- Incentives are required to attain opt-in mobile subscribers.¹⁹ Examples include coupon vouchers and waived text message fees.
- YAYAs tend to utilize phones for enjoyment more than resources.¹⁶ YAYAs want their cell phones to be more than simply “a phone.” YAYAs expect to have features like games and widgets.

YAYAs Like Both Traditional and New Media:

- 58 percent of YAYAs say they use magazines to find out about what’s cool and hip, such as clothes, cars and music.³¹
- 71 percent of YAYAs say they enjoy reading print magazines even though they know they could find most of the same information online.³¹
- When YAYAs find a particular television show or Web site they enjoy, YAYAs tell an average of 18 people, compared to only 10 people for all other age groups.³¹
- Word of mouth effectively drives most YAYAs to visit a Web site, followed by a TV ad.³¹
- 48 percent of YAYAs visit TV station Web sites in a typical week.³¹
- They spend similar amounts of time consuming user-generated and commercial content online, with user-generated content growing significantly.³¹



Youth and Young Adult Research Sources

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