

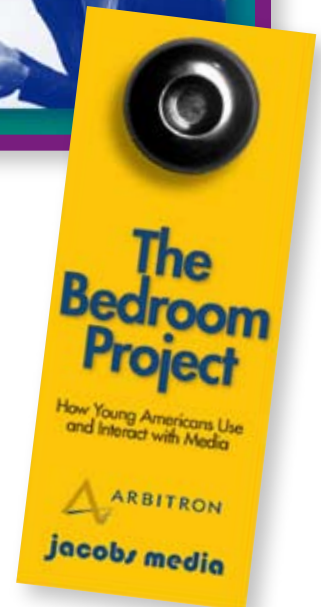


The Bedroom Project

Fascinating new research that lets you hear the thoughts and opinions of 18- to 28-year-olds.

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Project Overview & Goals

In late 2006, Arbitron commissioned Jacobs Media to conduct an ethnographic study among young people to better understand how they use media and technology in a rapidly changing environment.

To transcend the simple question-and-answer nature of quantitative studies, and to go beyond the traditional focus group environment, ethnography was chosen in order to better observe young respondents in their natural habitats.

The following were identified as the guiding questions for this study:

1. How do America's young adults integrate media, entertainment, and information technology into their daily lives?
2. What are the attitudes of America's young adults toward participation in survey research?

Project Methodology

Two markets were selected for the interviews: Los Angeles and Columbus, Ohio. Overall, 31 respondents between the ages of 17 and 28 were interviewed in February 2007. Interviews were conducted among Caucasians, African-Americans, Latinos, and Asian-Americans.

Additionally, interviewees were single, college students, young professionals, married, and married with children. Living situations included respondents in dormitories, students living off-campus, in apartments, homes, fraternity houses, and living with parents. We found that much of their time with technology was spent in their bedrooms, which not only gave us the name for this study—*The Bedroom Project*—but also the name “Bedroomers” for this generation.

Respondents were required to have a personal computer at home with high-speed access, as well as ownership of a mobile phone.

To make the respondents more comfortable, a team of peer interviewers—mirroring age, gender, and ethnicity as much as possible—were hired and trained to conduct the actual interviews. Jacobs Media staffers operated the video cameras and were present for every interview.

The interviews themselves averaged two hours and were conducted primarily in the respondents' dwelling, in addition to a visit to their primary vehicle where applicable. All interviews were videotaped and transcribed. Respondents signed release forms, allowing Jacobs Media to tape the interviews and utilize video footage in industry presentations.

Key Findings—Media & Technology

- 1. Bedroomers are immersed in media and technology.** Most seem to be always connected to something, and they frequently multitask (some do so even while driving). While many aren't tech-savvy per se, they acknowledge growing up with technology. Most revel in the wide array of media/technology choice and advancements available to them, and there's a sense they're living in truly interesting times.
- 2. For many Bedroomers, technology defines their peer group, and some take pride in being the “technology generation.”** Oftentimes, they describe the advantages of being amidst new technology, media, and gadgetry by making comparisons to the more tech-resistant attitudes of their parents. Several note a technological generation gap between themselves and older relatives. Additionally, some say they sometimes function as “in-house” technology advisers and fixers among family members.
- 3. Many express a sense of passion for a number of new media and modern gadgetry.** To that end, a number say they often think about how the future will get better as technology advances. Many desire devices that are thinner, smaller, elegant, and versatile. There are expectations that technology will merge various devices into compact, cool and multifunctional packages.
- 4. Of all the devices that Bedroomers discuss, the mobile phone emerges as the most revered, the most valued, and the most essential.** Respondents were all prescreened for mobile phone ownership, and most use these devices with great frequency and passion. Clearly, they use their phones to do many functions beyond speaking to others, and in this context, texting often leads the way.
- 5. For most Bedroomers, the mobile phone is the Swiss Army knife of devices, serving simultaneously as a lifeline, fashion statement, photo album, and status symbol, that allows them to express their own unique personalities.** Whether it's the model of the phone itself, its color, customized phone cases, ringtones, wallpaper, or other attributes, the mobile phone is a device they've mastered. It also is a device that has cross-gender appeal. Down the road, they expect even more from mobile phone technology, and many are planning for their next device. There is acknowledgement that the future will be shaped by mobile phone improvements—greater portability, smaller size, and extensive integration. Many essentially describe the iPhone, before it came out. Video is also a desired future mobile phone feature, including improved cameras. And content creation is part of the mobile phone wave, as some respondents use these portable devices to interface with social networking sites.
- 6. Many are “cell phone only,” and these Bedroomers openly question why they need both a landline and mobile phone.** While a number live in homes that have landlines, they are often quick to point out that these traditional phones are used by others in the household. Many associate landlines with their parents, and indicate they do not personally interact with these phones. Clearly, this cell-phone-only situation among this demographic, in particular, is a tough challenge for researchers. (More on this in the research section of this executive summary.)

7. **Texting is a primary activity on mobile phones and is growing in importance.** Many Bedroomers text as much as or more than they talk on the phone. Some say they exceed their texting plans and wish to upgrade so they can text message more frequently and liberally. The heaviest texters communicate in this fashion essentially everywhere they go, including texting those in close proximity. Texting is a selective activity, and many say they choose who they wish to talk to and/or text. Some text while driving; others express a guilty pleasure that they text in situations they know may be inappropriate. As an activity, mobile phone texting may be displacing Instant Messaging (IMing or IM) online. Texting is also an illustration of the generational divide, as some note that adults/parents are not proficient with texting skills.
8. **Social networking is a ubiquitous activity enabling Bedroomers to communicate intimately with friends . . . and “friends.”** MySpace is the gold standard among Bedroomers, but Facebook shows signs of coming on strong, especially among students. In some cases, these online networks appear to be usurping conventional e-mail and IM activities. Respondents often like the group messaging aspect of these sites, allowing them to mass-inform many friends instantly about events in their lives.
9. **There are indications that social networking sites are used differently, depending on the demographic and lifestyle.** Younger, single people, for example, often rely on social networking habitually and as a primary point of contact. Others rely on these networks for staying in touch with friends from their pasts, rediscovering old friends, or being rediscovered themselves. Some use these networks as a digital family bulletin board. For others, it’s a day-to-day, even hour-by-hour, social lifeline. Many say they use these sites less to meet new people online and more for managing existing friendships and relationships. Many differentiate between friends and social network “friends.” Some women express concerns about sexual predators, while some men say they fear that having too much information online could create occupational or personal/relationship problems.
10. **Social networking sites aside, for many, the Internet has become more utilitarian in usage and scope.** Some say the Internet functions as the epicenter of online banking, interfacing with schools/jobs/careers, and performing various functions—such as photo sharing, product research, and shopping. Having said that, many rely more and more on news and entertainment sites, video streaming sites such as YouTube, and other resources where they can easily and instantly access content on demand. This integration of **control, variety, and choice—or CVC**—is an ongoing theme throughout *The Bedroom Project* interviews. These same attributes make video streaming attractive and popular. Some Bedroomers are regular visitors to TV-network Web sites where they can access programs and/or acquire information about favorite shows.
11. **While e-mail has become a primary form of communication in American homes and businesses, many Bedroomers appear to be decreasing their use of electronic mail.** Several say they use conventional e-mail less frequently nowadays, opting instead for social networking communication and/or texting. In this context, e-mail is often reserved for more formal business/academic purposes. Notably, few actually listen to streaming audio stations—sites that notably lack CVC attributes.

- 12. iPods® are everywhere and going strong.** Just about everyone owns one (and, yes, Apple-branded MP3 players are the most popular), and once again, these devices provide CVC—control, variety, and choice—without the commercials. Additionally, they also exude portability and aesthetic value. Most speak about their portable MP3 players passionately. For many, these devices have become their central source of music consumption. The iPod has not fully made its way into vehicles, but several are able to connect them in the cars they drive, while others look forward to the day when they are able to do so. Several own the iTrip, but the general consensus is that this device is substandard. Many look forward to having a direct connection in their next car or vehicle for their iPod. Interestingly, some own video iPods, but most of these respondents do not use them for viewing video.
- 13. Television is a great example of “old media” fighting back with outstanding, buzz worthy content.** For many, TV is social networking. Many Bedroomers have “must see” programs they watch in groups, and/or discuss via technology or in person. Some visit network Web sites to glean more information about shows or to watch them at their convenience. (ABC.com is mentioned with frequency.) Shows like *Grey’s Anatomy*, *Lost*, *American Idol*, and *Heroes* are all mentioned in multiple interviews. Regardless of all the new technology, television represents the hottest entertainment content available.
- 14. The DVR has brought the concept of CVC to TV (while virtually eliminating commercials), and in some cases, has increased overall time spent viewing.** While TV programs have always created cult followers and fans, it appears that technology—notably DVRs, Internet sites, and social networking groups—has enabled these connections and loyalties to become amplified and intensified. Others enjoy DVRs to eliminate commercials and to save time while enjoying favorite shows. Some of those who don’t own a DVR use the incessant repetition of programs on certain cable channels in a TiVo®-like way. If they don’t watch the original broadcast, they have confidence the show will appear again and again, allowing them to see it at a more convenient time.
- 15. There’s a great deal of video game play, and contrary to conventional wisdom, gamers are not necessarily loners.** In fact, many connect socially via games, either in groups or online. There is no shortage of games or game genres to choose from, and while females often participate, men emerge as the heavier, more frequent players. Some play games for escapism; for others, it is about relaxation or competition. Some discuss video game addiction as a by-product of regular play.
- 16. Radio is often relegated to a secondary media choice, and an alarming number of Bedroomers do not have (or rarely use) an AM/FM radio in their homes.** In some of the interviews, radio is a nonfactor until the required trip to the car. For those who don’t have a radio in their primary dwelling, its role in their overall media/entertainment scheme is minimal. For everyone else, there is typically more enthusiasm about other entertainment choices and newer technologies. Radio’s lack of CVC (control, variety, and choice), combined with perceptions of excessive commercials and being “old school”—often drops its status among other media. As noted, most of the meaningful radio discussions in these interviews occurred when we visited the respondents’ vehicles. To that end, radio’s traditional listening locations are being threatened by new devices. Portability has been usurped by personal MP3 players, in-home radio listenership is overshadowed by myriad gadgets, and even in-car listening is being challenged by current and future MP3 connectivity.

17. Yet, there is enthusiasm for radio personalities, especially in the morning hours. In this context, some mention radio's local nature, its ability to provide topicality, and its time-honored function as a medium that plays and exposes new music. Yet, as noted, we ran across many homes, apartments, and dorm rooms that simply lack a radio among the many other devices that were present. And some clearly associate radio with something their parents enjoy. In these cases, the term "old media" fits. While not prominent, some aspire to satellite radio, although most are not subscribers, despite owning many other gadgets and entertainment devices.

Key Findings—Research Surveys

- 1. Willingness to participate in a survey is closely associated with interest in the topic.** Bedroomers say they want to make a contribution to the outcome of research and don't want to feel like their time is being wasted. They are generally more interested in surveys about technology and media rather than studies about radio. Given the relatively low media profile that radio occupies among most Bedroomers, there are implications on surveying the medium for Arbitron and perceptual research companies alike, but the challenge could be lessened by changing the way participation is introduced during the first point of contact.
- 2. The telephone as a survey research tool is problematic for many respondents.** First, many don't have a landline, or they live in a dwelling where a landline is primarily used by other people in the household. Many consider an uninvited phone call as an interruption and an imposition. Some say they absolutely will not participate in a phone survey.
- 3. Bettering technology or specific media through research has appeal to Bedroomers.** There are indications that respondents would be more open to participating in a research study that is positioned as focusing on media and technology, where the results will be utilized by companies to improve their programming and technology offerings. Yet, there is little indication that respondents are motivated to participate in a research study in order to better represent their particular ethnic group or generation.
- 4. Other key drivers: convenience and compensation.** Respondents indicate that key motivators for research cooperation include stressing convenience (making the survey simple and fast), compensation, and of course, interest in the topic. To that end, crafting research introductions like this one might aid participation and overall interest:

“By participating in this brief and simple survey you will contribute to improving the media and technology that you use, and you will be paid for your time.”
- 5. There is inherent cynicism associated with research surveys.** Moreover, several express significant distrust of much of the research they've seen. There is a sense that some of these studies are perceived as marketing campaigns disguised as research, that is, using numbers to sell a product or manipulate behavior. In some cases, the methodology of the research and/or the sponsor can influence and skew opinions. There is also distrust about Internet polls, and several feel that political polls can differ greatly, depending on the sponsoring news organization or research source.

For more information on *The Bedroom Project*, and to view video modules, visit www.thebedroomstudy.com.



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