

# TRENDS & TUDES

*Keeping you connected to today's youth audience*

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## EDITORIAL

### Our Take On It



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As I was reviewing the results of *The Norton Online Living Report 2009*, I was struck by how the findings spoke to so many of the issues and themes that are central to understanding kids' and teens' lives. Whether you are a youth marketer, researcher, service provider or educator, these areas are bound to impact the plans and decisions you make every day. Broadly speaking, I see these themes as: the role of the Internet in young people's lives; safety, independence and responsibility; parents and families; cross-cultural comparisons and the global marketplace; and young people's own interests and points of view.

In *The Norton Online Living Report*, I was fascinated by both the similarities and differences across the countries surveyed. When it comes to young people's attitudes about the Internet and the role it plays in their lives, there did not seem to be a

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## Online Youth Around The World

Children around the globe are online, accessing the World Wide Web and everything it holds at home, at school, at friend's houses, and by mobile phone. As a leader in online safety, Symantec commissioned Harris Interactive to conduct an international survey aimed at generating conversation and awareness centering on the activities of online adults and youth. This survey, which spanned 12 countries and five continents, revealed many interesting similarities about online youth, as well as some remarkable differences. *The Norton Online Living Report 2009* is based on interviews with 6,427 online adults, including 1,297 parents of children ages 8-17, and 2,614 online youth ages 8-17 in the US, Canada, UK, France, Germany, Italy, Sweden, China, Japan, India, Australia, and Brazil.

The survey revealed that children around the world report spending more time online than their parents think they do - this was the finding in each of the twelve countries. On average across the 12 countries, children report spending nearly twice as much time online per month (39 hours) than their parents estimate (21 hours). Parents in Canada and China appear to know their children's online habits the best, but were still off by about



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strong relationship between the amount of time they spend online and the extent that they felt the time they spent online was valuable. Young people in Brazil and Sweden reported spending the most time online per month, while those in Japan, China and Germany were among those spending the least amount of time online. Yet despite their differences in the amount of time spent online, young people in Brazil and China are most likely to say they could not live without the Internet, while young people in Sweden and Germany were the least likely to feel this way. And their reasons for feeling this way may differ as well. Young people in China are the most likely to say that children are mainly learning valuable skills when they are online, those in Brazil are as likely to feel that they are wasting their time.

Another cross-cultural area of difference was the way in which young people in different countries use the Internet with their parents or other family members. This also seemed to be less a function of the Internet, either the amount of time they spend online or even Internet penetration in the country, and perhaps more to do with the cultural differences among families across these countries.

The age-old tension between parents' desire to protect the safety of their children, while encouraging their teen's desire for independence is seen playing out in this international data as well. The Internet presents opportunities for both. In another survey recently conducted by Harris Interactive and highlighted in this issue of Trends & Tudes (Cox Communication's Survey on Cybersafety), the rising dangers of cyberbullying and "sexting" are highlighted. Unlike many adults' perception that online dangers are due to

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**Online Youth Around The World***Continued from page 1***Different Perspectives***How many hours per month do you spend on the Internet?*

Base: Youth n=2614; Parents n=1297

<b>Country</b>	<b>Actual Number of Hours Kids Spend Online</b>	<b>Number of Hours Parents Think Kids Spend Online</b>	<b>Difference</b>
<b>Total</b>	<b>39 (n=2614)</b>	<b>21 (n=1297)</b>	<b>+18</b>
<b>UK</b>	<b>44 (n=238)</b>	<b>19 (n=112)</b>	<b>+25</b>
<b>US</b>	<b>42 (n=220)</b>	<b>18 (n=100)</b>	<b>+24</b>
<b>Australia</b>	<b>49 (n=227)</b>	<b>28 (n=108)</b>	<b>+21</b>
<b>France</b>	<b>42 (n=203)</b>	<b>23 (n=151)</b>	<b>+19</b>
<b>Japan</b>	<b>31 (n=211)</b>	<b>13 (n=108)</b>	<b>+18</b>
<b>Germany</b>	<b>34 (n=208)</b>	<b>20 (n=102)</b>	<b>+14</b>
<b>Brazil</b>	<b>70 (n=204)</b>	<b>56 (n=100)</b>	<b>+14</b>
<b>India</b>	<b>34 (n=206)</b>	<b>21 (n=101)</b>	<b>+13</b>
<b>Sweden</b>	<b>59 (n=216)</b>	<b>46 (n=105)</b>	<b>+13</b>
<b>Italy</b>	<b>40 (n=214)</b>	<b>27 (n=107)</b>	<b>+13</b>
<b>Canada</b>	<b>42 (n=206)</b>	<b>30 (n=103)</b>	<b>+12</b>
<b>China</b>	<b>33 (n=261)</b>	<b>21 (n=100)</b>	<b>+12</b>

Source: The Norton Online Living Report 2009

12 hours a month when estimating time spent online. Parents in the UK and the US are the furthest from knowing when their children are online with estimates differing by 25 and 24 hours per month respectively.

Despite underestimating how much time children are spending online, half of parents across the 12 countries believe children today are spending too much time online – perhaps even more would think so if they knew how much time children report they are spending on the web. About half or more of parents in each country surveyed think children are spending too much time online, with

the exception of UK (37%) and Japan (19%). Online parents in Japan (12%) and India (16%) are the most likely to believe children do not spend enough time online.

Another similarity across the 12 countries is parents' perspective on who has the most responsibility in protecting children online. Overall, 9 in 10 parents believe parents themselves hold the most responsibility and in 9 of the 12 countries 91% or more of parents feel this way. While they still place the most responsibility on parents than on Internet security companies, the government or children themselves, the levels at which they place responsibility with parents are slightly lower in Germany

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adults trolling the Internet, these threats to teens' safety are from their peers.

Of course, parents' role is to be a mentor as well as a protector, and the importance of this responsibility is highlighted in *The Teen Voice 2009* study that Harris Interactive conducted for the Search Institute and sponsored by the Best Buy Children's Foundation. This study reminds us to keep in mind the enthusiasm and high expectations that teens bring to the interests and activities that they are truly passionate about and the impact that has on their engagement with their communities and potentially their lives as adults. And it is this opportunity to track and explore young people's development of skills, confidence and excitement that makes the youth market the important and fascinating sector that it is.

## Recent Research For Public Release

### ONLY SEVEN PERCENT OF U.S. TEENS HAVE ALL THREE LIFE EXPERIENCES KEY TO THEIR FUTURES

"Teen Voice 2009" Study Underscores Opportunity to help Teens Identify their Passions, Find their Voices and Build Relationships That Support Their Development

MINNEAPOLIS, June 8 – A new study exploring the importance of teen motivation and engagement in civic life finds that only seven percent of 15 year-olds in the U.S. experience a strong combination of three key factors critical to

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### Time Management

*Do you believe children spend too much time online?*

Base: Total Parents (n=1297); US (n=100); Canada (n=103); UK (n=112); France (n=151); Germany (n=102); Italy (n=107); Sweden (n=105); China (n=100); Japan (n=108); India (n=101); Australia (n=108); Brazil (n=100)



Source: *The Norton Online Living Report 2009*

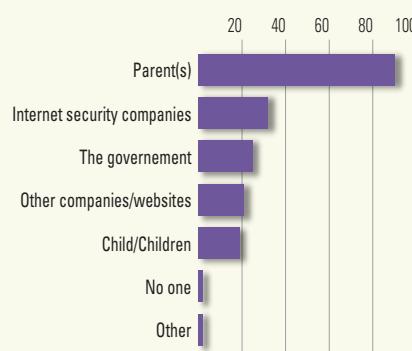
(87%), China (83%), and Japan (79%). While there are many similarities among online youth and parents around the world, there are also stark differences. One of these differences is the degree to which children interact with their families using modern technology. In India, more than

half (55%) of online children communicate with their grandparents most often using email, cell phone, instant messenger, texting, or social networking sites. Among the 12 countries, Brazil comes in second with 41% of online children communicating with grandparents this way, but fewer than 1 in 5 (15%) of online children in Germany are doing so. Additionally, in Brazil 6 in 10 online children say that one of their parents is a contact or 'friend' on their online profile, but that doesn't seem to be as cool in the Japan, where only 9% of children are 'friends' with their parent online. More than half of online children in China (56%) and in India (59%) are more willing to communicate with their family about touchy subjects online than they would be on the phone or in person. Across the rest of the 10 countries, no more than 21% of online youth agree with this and as few as 7% agree with this in Germany.

### Enforcing The Internet

*Who do you think should have the most responsibility for protecting kids online?*

Base: All Respondent Parents; n=1297



Source: *The Norton Online Living Report 2009*

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their success, according to research sponsored by the Best Buy Children's Foundation.

The national survey of 1,817 teens, conducted by Search Institute – Teen Voice 2009: The Untapped Strengths of 15-Year-Olds – finds that a majority of 15-year-olds lack high levels of each of the concepts: "sparks," "teen voice" and "relationships and opportunities." These three factors, when experienced at high levels and combined, provide young people the support they need to set and keep a positive course in the midst of a critical time in their lives.

For more information about @15 and to view the full report, log on to [www.at15.com](http://www.at15.com).

### COX'S NEW SURVEY ON CYBER-SAFETY FINDS MANY TEENS GOING ONLINE WIRELESSLY WITHOUT LIMITS OR CONTROLS

ATLANTA – For the fifth consecutive year, Cox Communications, in partnership with the National Center for Missing & Exploited Children® (NCMEC) and America's Most Wanted host and children's advocate John Walsh, will present the results of a new survey on the behavior of young people online. This year, the survey also looks at teen behavior using wireless devices.

Key results from the survey conducted by Harris Interactive among a representative sampling of U.S. teens between the ages of thirteen and eighteen years include:

- Conflicted over Safety: Most teens surveyed are aware and concerned about

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### Online Youth Around The World

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Other differences include children's feelings about the quality of time they are spending on the Internet. The majority of online youth in the US (67%) and Canada (58%) say children are mainly wasting their time when they are online, as opposed to learning valuable skills. However, in China (84%), Italy (75%), and India (76%) the majority of online children believe they are mostly learning valuable skills, as opposed to wasting their time.

This discrepancy may have something to do with the different attitudes towards the Internet as a means of learning. While the majority (86%) of online youth across all 12 countries believes the Internet has made learning much easier for children today, there are differences when it comes to specifics. In China (88%), India (77%), and Australia (74%) about three-quarters

or more of children believe reading online is just as valuable for children as reading a book, but in France (59%), and Japan (62%) the majority disagree. Moreover, more than 7 in 10 online children in France (78%) and Brazil (73%) believe email, instant messaging, text messaging and posting on social networking websites or blogs make it harder for children today to learn to write well, but those in Germany (62%) and China (66%) are more likely to disagree.

When it comes to addiction to the Net, children in certain countries are clearly more hooked than those in others. Eighty-three percent of online children in China and Brazil claim they could not live without the Internet. And, while there are majorities feeling this way in many of the other countries, slightly fewer than half

### Learning Or Wasting Time

*When children are online, do you believe they are learning valuable skills, or wasting time?*

*Base: Total (n=2614); US (n=220); Canada (n=206); UK (n=238); France (n=203); Germany (n=208); Italy (n=214); Sweden (n=216); China (n=261); Japan (n=211); India (n=206); Australia (n=227); Brazil (n=204)*



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the risks of putting personal information out in the open. Fifty-nine percent say having personal information or photos on a public site is unsafe, and 26 percent say they know someone who has had something bad happen to them because of this. Still, 62 percent of teens post photos of themselves on blogs or social networking sites and greater than 40 percent name their school or the city in which they live.

- Prevalent Cyberbullying: More than one-third of teens surveyed have been cyberbullied, perpetrated cyberbullying or know of friends who have experienced or perpetrated it, and 68 percent think it is a serious problem. About 4 in 5 teens (81 percent) think that bullying online is easier to get away with or to hide from their parents than bullying in person.

- Engaging in Sexting: Nineteen percent of teens surveyed have engaged in sexting -- sending, receiving or forwarding sexually suggestive nude or nearly nude photos through text message or email. Sixty percent of teens who sent sexts say they send photos to their boyfriend/girlfriend, but 11 percent say they have sent sexts(1) to someone they don't even know. Eighty-one percent of teen sexters are under 18.

Report available at:

[http://www.cox.com/takeCharge/includes/docs/2009\\_teen\\_survey\\_internet\\_and\\_wireless\\_safety.pdf](http://www.cox.com/takeCharge/includes/docs/2009_teen_survey_internet_and_wireless_safety.pdf)

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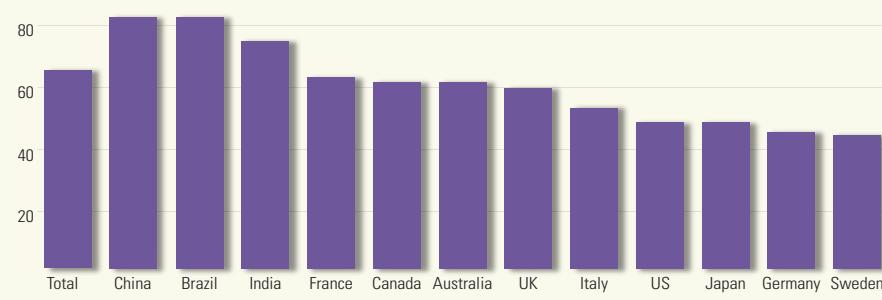
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### Online Dependency

*Percentage who could not live without the Internet*

Base: Total (n=2614); US (n=220); Canada (n=206); UK (n=238); France (n=203); Germany (n=208); Italy (n=214); Sweden (n=216); China (n=261); Japan (n=211); India (n=206); Australia (n=227); Brazil (n=204)



Source: The Norton Online Living Report 2009

say they could not do without it in US (49%), Japan (49%), Germany (46%), and Sweden (45%).

The survey offers unique insights into the similarities and differences among online youth and parents around the

globe. More information about the Norton Online Living Report 2009 is available at:

[http://www.symantec.com/about/news/release/article.jsp?prid=20090317\\_02](http://www.symantec.com/about/news/release/article.jsp?prid=20090317_02)

## YouthPulse™ 2009 Soon to be Released

You need to know almost as much about the youth market as you would if they were all your own children. How they spend their time, how they spend their money, their hopes, fears and aspirations and which parts of the kid experience are totally different today than they were a decade – or even a year – ago.

YouthPulse is the only study covering these topics and hundreds of others. New this year: The 2009 YouthPulse report has been expanded to a total of 2,500 interviews to an extended age range of youth ages 8 to 24. This year's report will be available in October. For more information or to order the report, contact us at: [info@harrisinteractive.com](mailto:info@harrisinteractive.com)

## Contact Us

To make suggestions regarding this newsletter, or to discuss a business issue involving youth or the people and issues that influence today's youth, please contact us at **877.919.4765** or [info@harrisinteractive.com](mailto:info@harrisinteractive.com)

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