

July 2007

THE NOW

REPORT



An insider's guide to what collegians are thinking & doing

SUMMERTIME ...

Cell phone behavior unveiled and politics too!

College students are very dissatisfied with George W. Bush's performance as president. With an overall approval rating of only 20%, more than half of students describe their disapproval as strong.

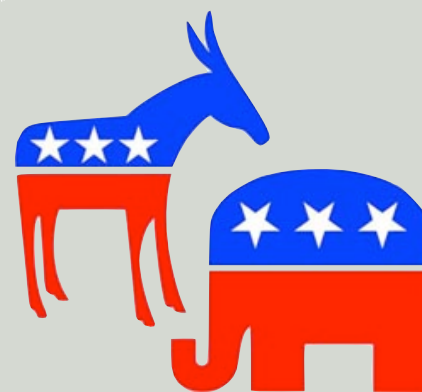
While students vary a great deal by psycho-graphic segment, the war in Iraq was cited as the most important issue facing America by one in ten students, followed closely by dissatisfaction with government and politicians. Ethics, health-care and education round out the issues considered important by students.

With nearly four out of five students claim to be registered to vote, students lean toward democratic candidates running for president in '08. Barack Obama

holds a commanding lead over all other presidential candidates with 44% of students claiming that they would vote for him if an election were held today. Hillary Clinton (17%) and Rudy Giuliani (14%) place a distant second and third place.

There is a great deal of resistance to Hillary, with four in ten of students refusing to consider voting for her in '08, a number that is higher than any other candidate, Republican or Democrat.

If college students were asked to determine the 44th president of the United States in August of 2007, the Democratic candidate would be Barack Obama, who would defeat the Republican candidate, Rudy Giuliani, to win the presidency.



Are students Dems, GOP or Indie?

Students affiliate themselves with Democrats (44%), followed by Republicans (19%) and Independents (17%). One in five are not affiliated with these three political groups or are uncertain of their affiliation.

Constantly Connected ...

Mobile phones are the lifeline of the Millennial generation, used to stay in constant touch with their friends and their parents. When asked how critical a cell phone was to their lives, nearly half (48%) said that they could not live without the phone, while a similar number (46%) said that they would miss their phone but could do without it.

Cell phones are an 'always on' device for three quarters of college students who own one, with two out of ten (21%) saying that their phone is on 'most of the time'.

The social implications of cell phone usage are ingrained within this generation, with more than nine out of ten students (91%) saying that they frequently (36%) or occasionally (55%) encounter people using their cell phone in a loud and annoying manner in public. Of those that have a cell phone, one in eight (13%) have drawn criticism or dirty looks for the way that they use their cell phones in public.

Typical of the Millennial generation, cell phones are a co-purchased item: while four out of five (80%) of students actively selected their mobile device, less than four in ten (38%) chose the carrier that they use. Similarly, barely more than one quarter (26%) pay their monthly cellular telephone bill, with Mom & Dad looked to in order to fund this essential tool.

With features such as Chaperone, some cell phones and carriers allow parents to geographically track their little collegians. Clearly, manufacturers are looking to tighten the bonds between Millennials and their parents by providing more than just minutes ...

While the four most popular handsets (Motorola, LG Samsung and Nokia) account for 81% of handsets, the top four cellular networks (AT&T, Verizon, Sprint and T-Mobile) account for 90% of students.

The average monthly minutes consumed among students was 550, while the average monthly cell bill totaled \$74.



Millennials are the first generation in the history of mankind to, as children, surpass their parents in the use of new technologies.

J21.YK ...



What Do College Students Carry?

While nearly all college students (94%) have a cell phone, the Disconnected segment lags behind the pack at with penetration of only 74%.

Four out of five college students selected their own cell phone, favoring:

1. Motorola (32%)
2. Samsung (20%)
3. LG (19%)
4. Nokia (9%)
5. TIED: Sanyo (2%) /

Attitudes toward cell phones

Cell phones are seen as a vital tool, with more than three quarters (75%) of students stating that their mobile phone has really helped during an emergency.

Ironically four in ten students admit to the fact that they don't always drive as safely as they should due to the fact that they are preoccupied with their phones.

Millennials are true multi-taskers, with nearly two-thirds (65%) saying that they make cell phone calls to fill in their free time when they are traveling or waiting.

Students are a thrifty bunch, with more than six in ten (61%) seeking to maximize the use of their phone while minutes are free. Despite this parsimony, more than a third (36%) claim that they've been shocked by their bill.

Locational anonymity is used by students, 56% of which claim that they are not always truthful about their precise location when on the telephone.

The pressure of constant mobile use can be felt by nearly three in ten (29%) students who feel pressure to answer calls during meals or by the more than two thirds (35%) who feel that their cell phone makes them too accessible to others.

Cell Phone Activities

Mobile technologies have moved well beyond voice communication and college students have followed.

More than eight in ten use SMS (86%) and take pictures (82%) with their phones, while more than half play games (60%) or record video clips (53%).

More than a third use their phones to access the Internet (41%), play music (38%) or send and receive instant messages (36%).

More than one quarter utilize mobile search to find movie listings, weather and stock quotes (32%) or email (25%).

While more than one in five forward desktop instant messages to their cell phone (22%) and mobile maps (22%), only one in five access social networking sites using their cell phones (20%).

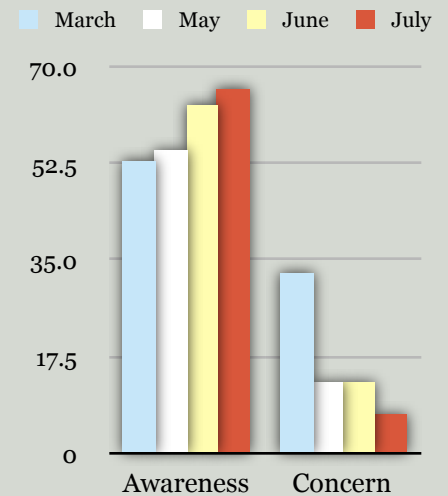
Tracking your own location via GPS (12%), playing videos (10%) and posting to blogs (10%) is performed by around one in ten, while tracking the location of others via GPS is performed by slightly less than one in ten (8%).

Over time, the incidence of these various mobile technologies will be tracked in order to measure their rise and fall.

RIAA Legal Action (continued)

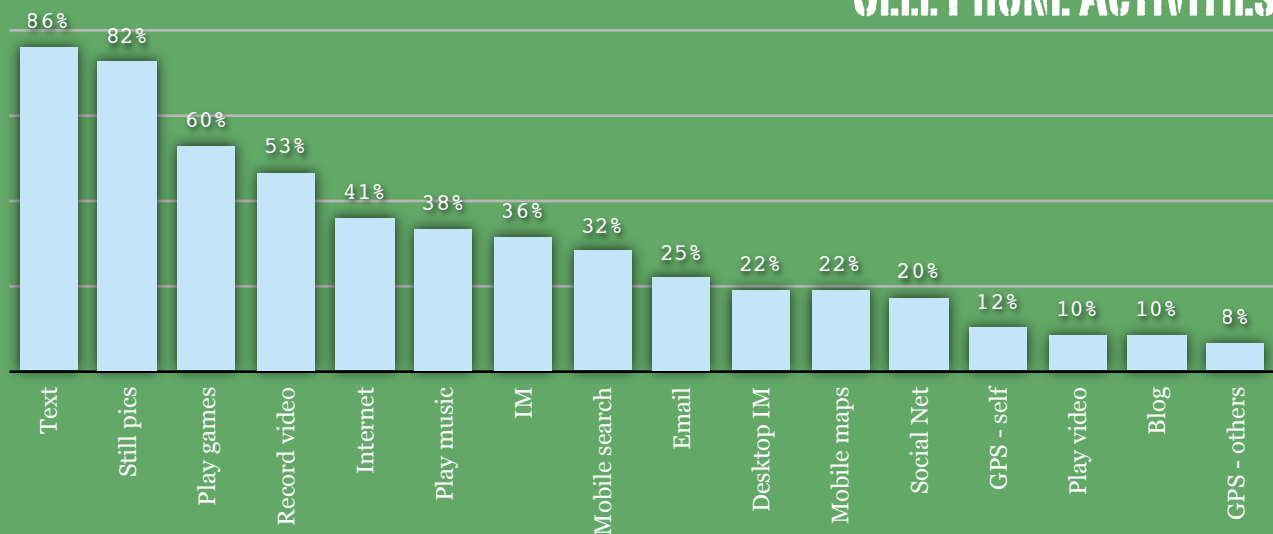
SurveyU has been tracking the reaction of students to the RIAA legal action since March.

Awareness has steadily increased as more and more students have received pre-litigation letters from RIAA lawyers.



Meanwhile, the level of concern that students have that they will personally be served a pre-litigation letter has steadily decreased over time. The RIAA has recently announced an increase in the number of letters sent in a back-to-school legal surge strategy. Stay tuned to next month's issue to see whether this has any impact on students' downloading habits.

CELL PHONE ACTIVITIES



IPHONE CONTINUED

Practically all students (99%) are aware of the iPhone at this point. This number is up significantly from the May Benchmark and largely unchanged June.

College students are warming up to the iPhone, with a reduction in the both the 'never' and 'not in the near future' purchase intent categories (from a combined 73% in May to a combined 57% in July). Yet one in five college students are deferring purchase to the next version.

Nearly half of iPhone purchasers bought theirs on launch weekend, with the remaining half distributed evenly across the four weeks that followed. Nearly two of three purchasers bought the 8GB version and more than seven in ten purchased directly from an Apple Store.

Predictably, Techno-Elite and Style Seeker segments were the first to

purchase, representing 90% of iPhone purchases made to date among collegians.

	MAY (N=2000)	JUNE (N=1000)	JULY (N=1000)
Aware	86%	97%	99%
Purchase Intentions			
Upon launch	3%	2%	2% (actual)
Within a few months	4%	3%	0%
When my contract expires	8%	8%	5%
Wait until version 2.0	12%	17%	22%
Not in the near future	52%	51%	50%
Never	21%	19%	20%



Technophilia

Millennials are enamored with technology, with 85% admitting that they like computers and technology and 15% admitting to mixed feelings.

A comparable study of US adults conducted by the Pew Foundation in March 2006 found that 63% like computers and technology.



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