

NARM Conference Presentation Handout Consumer Reality Delivered

onsite
researchassociates

CYBERCENSUS 2009

Presented June 8, 2009

Presenters from On-Site Research Associates
Maren Elwood/President
Rebecca Roth/Project Manager

www.onsiteresearch.com
831.238.5503

This handout does not include links to the movies that were an integral part of the presentation or the commentary by the presenters.

An e newsletter will be generated and sent to NARM members by the end of June which will include links to the movies.

If your company wants a personal presentation of this study, contact Maren Elwood at On-Site Research Associates 831 238 5503 melwood@onsiteresearch.com

NARM Conference Presentation Consumer Reality Delivered

onsite
researchassociates

CYBERCENSUS 2009

Intro movie sequence

Music & The Busy Mom

Cross-country ethnographic study of **music 2.0**
balancing the physical and digital world

media context
live....mediated...interactive

Introduction movie about the history of music

the music experience has come... **full circle**

music has been re-tribalized

2009 music is interactive & personal again

Interactive re-tribalized personal

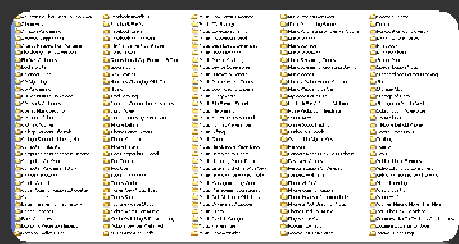
Live tribe active

Computerized audience active

Recorded passive/mediated

Staged audience reactive

what are the needs of this new tribe?



today we will share two findings
but there are many bins to mine

2008
we found that people differ on
two key factors


cultural context
history of cyber census




movie about
the history
of this study

Dot.com crash
9/11/01
economy suffered
started longitudinal study of
American trends

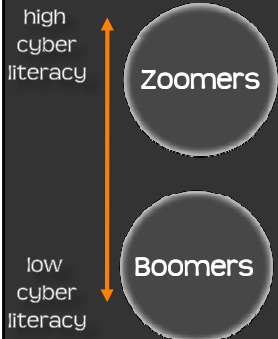
cyber literacy



device utilization



technological context rapidly changed
initial cyber segmentation



2004 web still not
ubiquitous

2008 web use
all over U.S.

Zoomers leaving
Boomers
behind

The country is in a rut




2009
a country out of **balance**



cyber census 2009 embedded in everyday life
cross country RV trip **100 ethnographic interviews**
ethno panel participants: 20 Boomers
20 Wired Boomers 40 Zoomers 20 Voomers


onsite
RESEARCH & CONSULTING

2009 cyber census context
recession



Job loss
security loss
changing gender roles
less discretionary income
many people are in **depression**
they **need music now** more than ever


music is needed at this time of
change



music can become a
positive, uplifting, inspiring, spiritual
soundtrack to one's life

music can be a pampering experience like
lipstick which can give you a boost
But it's not...why?

Americans are out of sync



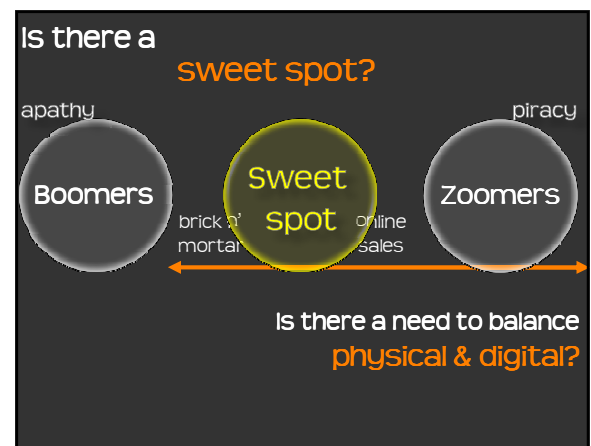
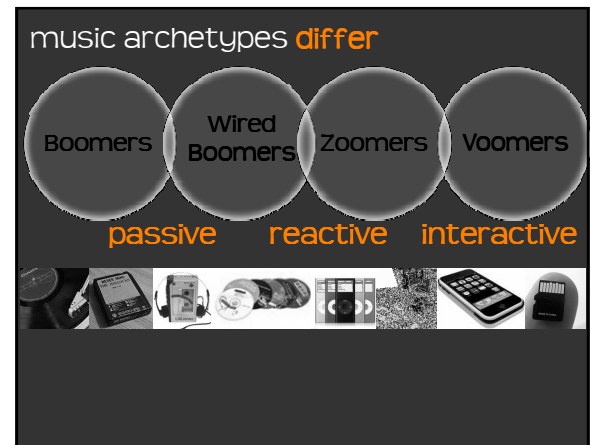
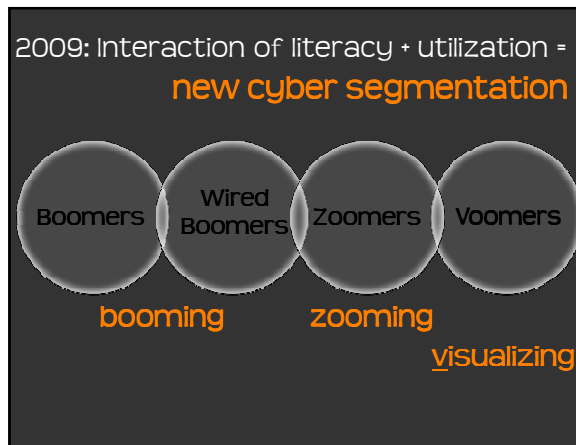
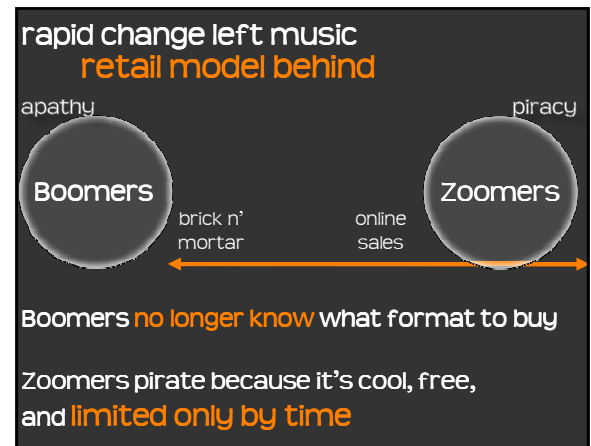
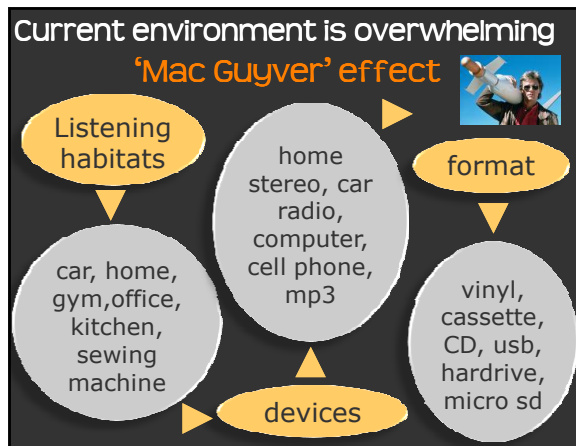
Physical lives **Cyber lives**

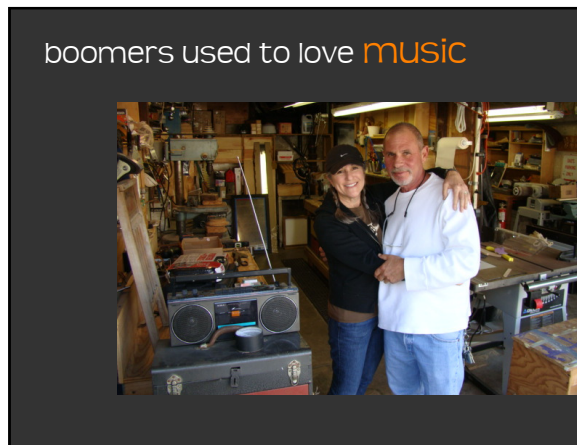
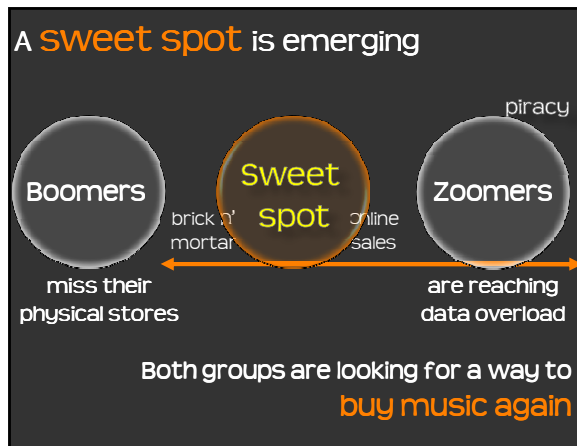
Parents are concerned about their children, but
they don't even understand the tech, so they
don't know what to do

music that moves you has changed to
music you need to move

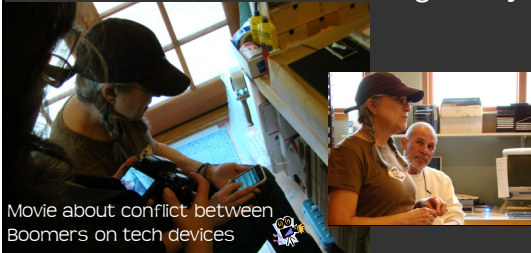
Link it **Share it** connect it
burn it **sync it**
But, how do you find it?

Boomers **don't get it**
Zoomers **get too much**





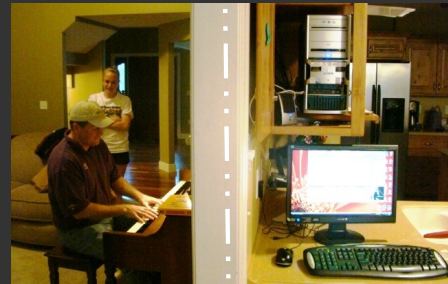
wired boomers are **struggling**
balancing tech joy



With their **traditional lifestyles**

Wired Boomers

straddle | the digital divide



Brad's story

wired Boomers **isolate their children**
to protect them from tech



Jeff & Linda's story

wired Boomers have to be
mentored by their children



Kathy's story

Wired Boomers are **working with tech**



But often only discover music
online by accident

music stores
used to be fun
for Boomers



They miss **discovering music**, looking
at the **album art**, and the **tactile**
experience of the store

But, **life got serious**,
kids needed attention,
and **money is tight**

key emotional need
reconnection with music life



ultimate benefit
enjoying music again



let's meet **Zoomers**

2004 – 2008 zoomers grew up to be
pirates



It was a lifestyle that was fed by
financial necessity + ample time
now they have jobs
and they know time is money

2009: Zoomers are experiencing...
data overload

movie
featuring
Randy and how
overloaded by
data his life has
become



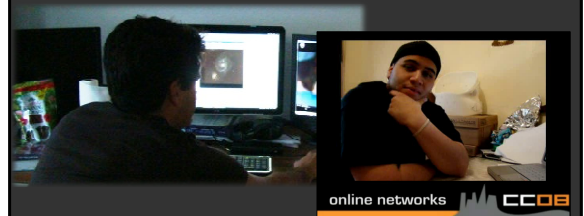
2009: wired zoomers mothers are
are **struggling** with new devices



movie
featuring Kim a
busy Mom who
traded an
iTouch for a
Nano

Kim's Story: just keep it simple

2009: Zoomers are social networking
themselves
into isolation



Chaz's Story: gamer intervention

2009: Zoomers are looking for ways
to balance digital & physical life



Ryan's Story: biking vs. DJ-ing

Zoomers are using social networks to
find physical space activity



2009: is return to vinyl
a return to physical?



tactile, sound quality, a social event

Zoomers are
burnt out

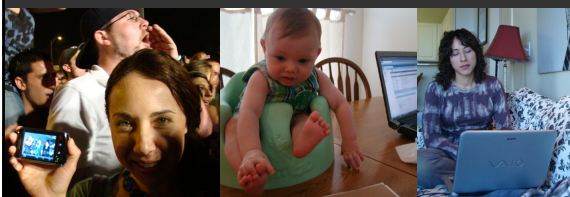


mass downloading has resulted in
overwhelming music management
faster, more reliable downloads and
management software = value

But...they expect purchasing to be
VERY easy... and there's no



key emotional need
balancing physical & digital life



ultimate benefit
music experience is truly interactive



movie
featuring
Began that
shows how
young people
are growing up
digital

let's talk to Voomers

Voomers are born to
eyes & fingers on screen



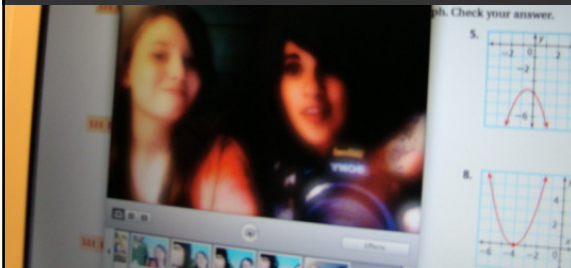
Chase's story

Voomers expect **screen interactivity**



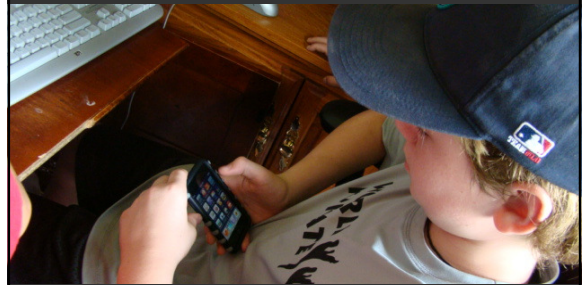
Chase's story

Voomers consider the **screen a part of**
their community



Kaitlin's story

Voomers **ap** their lives



Degan's story

Voomers love the **small screen**
and are **OK** with **small speakers**



Tanner's story

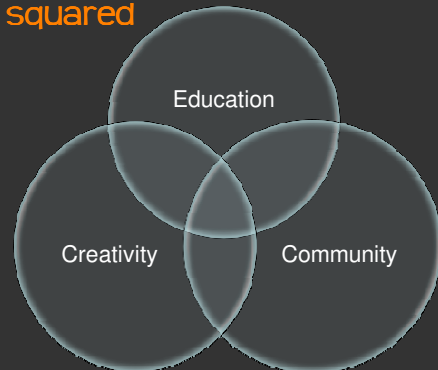
Voomers **visualize** their music



Lili's story

monetize

Bringing people back into stores will require
E + C squared



Monetizing online sites will require an



Boomer stories

Jon: totally disconnected from music

demonstration & education



a simple demo changed Jon's music life

create the ah ha!

iTunes is more than a store?



paradigm changing realization resulted in
new music behavior

Jon is reconnected to music life
Cyber Census Participant Forum
Global

Basic Info
Type: Internet & Technology - Cyberculture
Description: This group is set up to get continuous feedback from our ethno panel members. These are people who will be participating in the Cyber Census 2009 study.

Contact Info
Email: melwood@onsiteresearch.com
Office: Highway 1, 101, 66, etc etc...
Location: 225 Crossroads Blvd. #336

View Discussion Board
Message All Members
Promote Group with an Ad
Edit Group

Jon (Atlanta, GA) wrote at 7:12am on May 15th, 2009
Breaking news! Maren creates monster...Becky assists. Today I've plugged a transmitter for my wireless speakers into my computer and I am listening to Pandora throughout the house (and outside). Now if I could only get it to stop asking me if I'm still listening....
Write on Jon's Wall - Report - Delete

Jon (Atlanta, GA) wrote at 7:56am on May 15th, 2009
After yesterday's "session" with Maren and Becky I'm multi-tasking again. I've got Pandora playing in one ear, NPR (for news) and the outside world in the other, while I'm working on the computer (except for this "break" to share with you), maybe it's not that I can't multi-task, but that I just gave it up! THANKS!!!
Write on Jon's Wall - Report - Delete


61

monetize this
sharing photo albums




Educate include music with album either in-store or online

Monetize this
staying in love



send a song to your loved one online or by CD with a personalized label


monetize this
creativity with music



buy music & make movie in one cyber or physical place

Zoomer stories

Zoomer stories
sharing lives with community



Identify a song and send to friend

monetize this
fan journalists



movie featuring Reggie and his following on Facebook

784 friends

Monetize this...please

help people play, find and buy music from their cars so they can stop Mac Guyvering

Monetize this...please



help people play, find and buy music from their cars so they can stop Mac Guyvering

PANDORA myspace.com iTunes facebook YouTube Google

monetize this

easy


websites are delivery formats

listening, organizing, sharing, building community are all activities that take place in these cyber habitats

Opportunities exist in each community to provide the 'easy button' for point & click purchase

Monetize this

music socializing



Facebook does link to purchase, but hard to find

Zoomers want to buy off playlists

More to come

Check your NARM newsletter over the next few months for more information from this study and details about interactive webinars