ANNOUNCING TWO NEW
GROUND-BREAKING SURVEY REPORTS:

SCHOOLS AND THE INTERNET

CHILDREN, FAMILIES AND THE INTERNET 2003

From Grunwald Associates, known for its unique combination of rigorous methodology and careful analysis by industry leaders

grunwald associates

Discover key opportunities in the school market and with kids 2-17

- Technology buyers: detailed psychographics for dozens of school district and family types
- What really drives school technology purchases
- The school-to-home and home-to-school connections
- “Power kids” and what they’re looking for
- How broadband, wireless, and other technologies are reshaping the media landscape
- And much more

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TWO NEW REPORTS...
ONE COMPELLING LOOK AT WHAT'S DRIVING YOUR MARKET TODAY

"The pioneering work of Grunwald Associates has helped define the interplay between the home and school markets. They understand both the opportunities and the pitfalls of bringing kids, education and the Internet together.

CHERYL S. WILLIAMS, VP, CORPORATION FOR PUBLIC BROADCASTING

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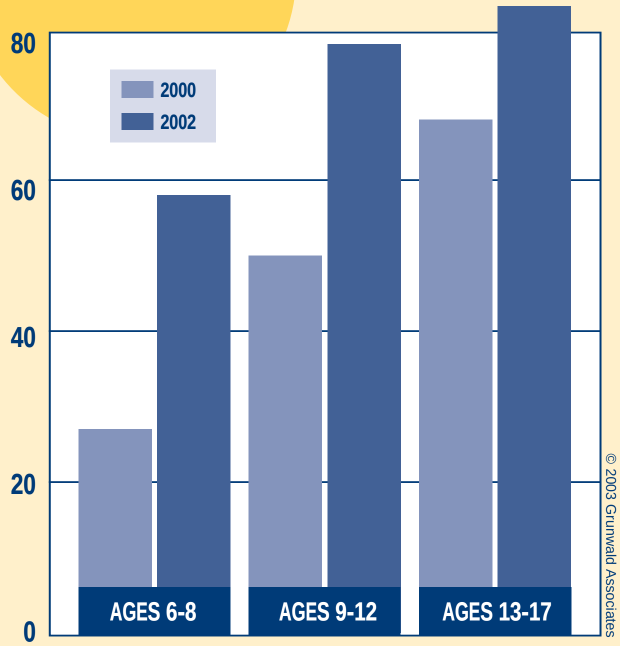
"Companies have to know where the market is going and meet it there, without getting lost on the way. Grunwald Associates helps equip us with the statistically sound data and insightful analyses we need to do just that.

JOHN SUPER, VP, STRATEGIC PLANNING, PLATO LEARNING, INC.

More Kids Are Online

Percent of kids 2000 vs. 2002 (online from any location)



WHAT YOU NEED TO KNOW	WHERE TO FIND IT	
Our two new ground-breaking research reports dig deep into home and school technology trends	**SCHOOLS AND THE INTERNET**	**CHILDREN, FAMILIES AND THE INTERNET 2003**
What's driving today's tough school tech decisions	●	
What schools really think of wireless, handhelds, online assessment and other new tech—and who's most interested	●	
District technology use beliefs—and student reality checks	●	●
E-learning growth and where it is headed	●	●
School-home and home-school connections	●	●
The impact of broadband (and other new technologies)	●	●
Where kids go and what they do on the Internet now		●
Which families grab the latest tech gadgets—and why		●
Television vs. Internet and other home media trade-offs		●
What kids and families want from new technologies		●
How kids shape what friends and family see, hear, and buy (and how to reach the biggest influencers)		●

SCHOOLS AND THE INTERNET

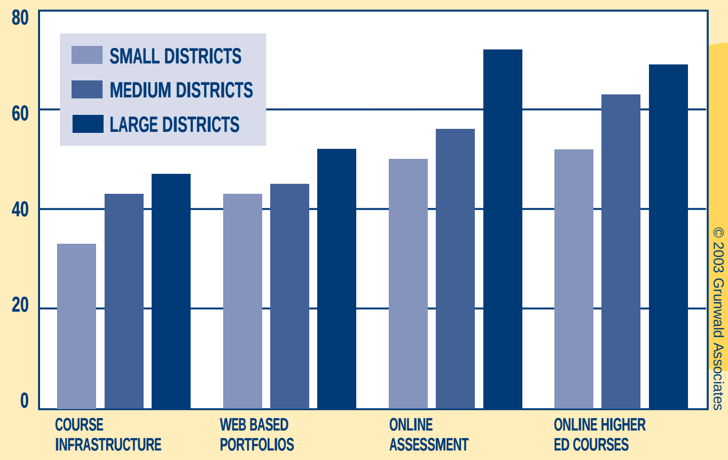
Find out where the education technology market is heading

Our in-depth survey of school district leaders provides fresh insights you can count on:

- **The applications and services schools want and need right now—and which schools want them most**
- **Online professional development**
- **What content schools will pay for—and how**
- **How parents and kids figure into school tech decisions**
- **How tech buyers learn about new products**
- **The future of e-learning**
- **And more**

We interviewed a carefully structured sample of decision-makers in 811 school districts (including 90 of the nation's 100 largest) in this cutting-edge study conducted with the National School Boards Foundation. Underwriting was provided by the Corporation for Public Broadcasting, PLATO Learning, and AT&T.

District Size & Interest in Internet Services



"Grunwald Associates is the gold standard in technology and learning research. Grunwald delivers home and school, teens and children, with solid data and keen insight.

JOHN KATZMAN, CHAIRMAN & CEO, THE PRINCETON REVIEW, INC.

CHILDREN, FAMILIES AND THE INTERNET 2003

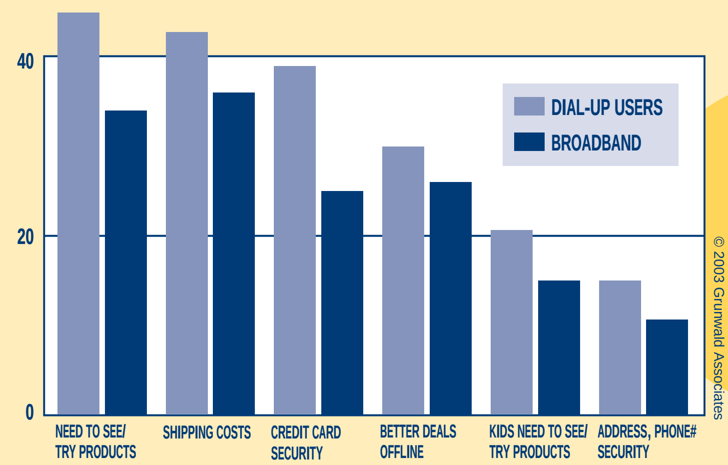
Trends change at warp speed in consumer technology. Are you on the right track?

This latest in our series of statistically sound surveys tracking Internet habits of American children and their families includes:

- **How kids and families are using new technologies in the home…and what's influencing them**
- **A reality check on the uses of classroom technology—from the student consumer**
- **Surprising differences in behavior/attitudes between broadband and non-broadband families**
- **What kids and parents want—and don't want—from Internet, handheld, wireless, and other new technologies**
- **How to make every part of your business model work: advertising, subscriptions, e-commerce and sponsorships**

In collaboration with C&R Research, we've combined a national telephone survey with 3 carefully structured Internet surveys. We interviewed thousands of kids ages 6-17 and parents of kids 2-17 and combined results with our deep database of earlier studies. Underwriting is from BellSouth, Kodak, and the Educational Testing Service.

Barriers to Parents' Online Purchases*



*Parents Who Have Searched for Products Online for Their Kids—But Not Bought

"Reaching today's families means understanding how children and parents really interact with the Internet and other technologies. That takes detailed, methodologically solid market research—the kind that Grunwald Associates has always excelled at.

MICHAEL A. LOTTI, DIRECTOR OF BUSINESS RESEARCH, KODAK

WHAT MAKES GRUNWALD ASSOCIATES' RESEARCH DIFFERENT?

- Hundreds of questions, thousands of respondents carefully balanced across multiple demographic categories for reliable projections
- A deep database of previous results for robust trend analysis
- Analysis provided by hands-on industry leaders who've had significant P&L responsibilities
- Concrete implications and detailed recommendations for decision makers
- Dozens of cross tabs and breakouts for hundreds of distinct variables

> *"Grunwald Associates was first with solid, thoughtful survey research on children's use of technology, and they remain the leaders in the field.*
>
> SUSAN ROYER, VICE PRESIDENT, SESAME WORKSHOP

SCHOOLS AND THE INTERNET

- **License**
- **Data Book**

Chapter 1: **Executive Summary**

Chapter 2: **District Types**
- District Size, Region, Locale, Socioeconomic Status
- Technology Ratio and e-Learning Expectations
- Parental Influence
- New Technology Adoption

Chapter 3: **Internet Connectivity and Alternative Hardware**
- Barriers to Access
- Student-to-Computer Ratio
- Alternative Hardware Products and Laptop Initiatives

Chapter 4: **Tech Support and Training**
- Outsourcing Tech Support
- Students and Tech Support

Chapter 5: **Teacher Preparation/Professional Development**
- Rating New Teachers
- Internet-Based Professional Development

Chapter 6: **Online Safety, Security, Privacy and Parents**
- Security, Privacy, Safety
- Parents and District Websites and Email
- Technology Equity

Chapter 7: **Funding Sources**
- Primary Initiatives for Funding Technology
- E-rate and How E-rate Savings are Being Used
- Preferences for Funding/Purchase Options

Chapter 8: **Technology Decision-Makers**
- Influence of: Superintendent and School Board, Technology, Coordinator, Tech Committee, Principal, Teachers

Chapter 9: **Purchasing Internet Content and Services**
- Major Information Sources
- Qualities in Evaluating Content Vendors

Chapter 10: **The Future of Educational Technology**
- Up and Coming Technologies
- Future of Online Instruction

CHILDREN, FAMILIES AND THE INTERNET 2003

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Executive Summary

Chapter 1: **Household Internet & Computer**
- Characteristics
- Overall Levels of Computer and Internet Use by Segment
- Internet Use by Segment
- Computer Ownership and Use

Chapter 2: **What Kids Do Online From Home**
- Demographics, Frequency and Duration of Home Use
- Online Activities and Personal Websites

Chapter 3: **What Kids Like (and How They Find It)**
- Number and Kinds of Websites Visited
- Website Features Liked, Disliked
- Learning About New Websites

Chapter 4: **Parent Role in Kids' Tech Use**
- Kids' Use with Parents
- Parents Concerns, Attitudes and Influence
- How to Reach/Find Parents

Chapter 5: **What Kids Do Online at School**
- Demographics, Frequency and Duration of School Use
- Online Activities, Subjects and Websites Visited
- Impact of Net Use on School Attitudes

Chapter 6: **The School-Home Connection**
- School-related Online Activities at Home
- Interest in Tools for Homework & Learning

Chapter 7: **Digital Games and Music**
- Use of Game Systems and Psychographics of gamers
- Online Game Features Liked, Disliked
- Music Listened to and Music-related Online Activities
- Music Player Use, Music Site Preferences and Willingness to Pay

Chapter 8: **Parents, Kids, and E-commerce**
- Parent and Kid Product Searching
- Product Searching Likes and Dislikes
- Kid and Parent Buyers: Demographics, Behavior, Attitudes

Chapter 9: **Subscriptions, Sponsorships, and Advertising**
- Families Buying Premium Services
- Attitudes Towards Types of Advertising and Sponsorship

Chapter 10: **The Online/Offline Connection**
- Connections/Trade-offs Between Internet Use and Other Media

Chapter 11: **Technology and TV**
- Connections Between What Kids Watch and What They Do Online
- Heavy/Light TV Watchers: Technology Attitudes and Use
- Heavy/Light Internet Users: TV Attitudes and Use

Chapter 12: **Power Kids: Patterns of Influence**
- Telling Other Kids About Sites; Use With Others
- Profiles: Product Searchers/Buyers; Gadget Owners

Chapter 13 **The Impact of Broadband**
- Demographics and Psychographics of Broadband Access
- Future Plans & Conversion Opportunities

Chapter 14 **The Impact of Other New Technologies**
- Wireless Handhelds, Digicams, Scanners, Other Technologies

Chapter 15 **The Future**
- Parents' and Kids' Expectations of the Net
- Interest in New Service Concepts
- Projections

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