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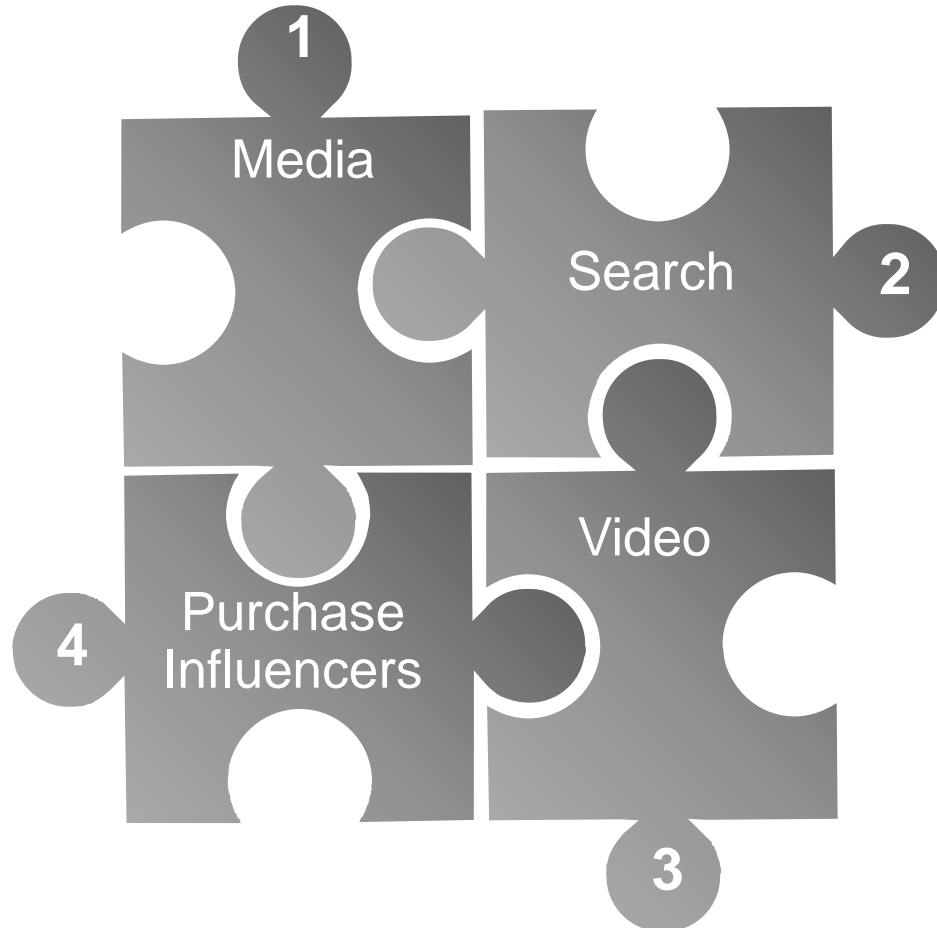
# The 4 Truths About Boomers & Media

Google/Nielsen Online/Sterling  
U.S., September 2010

# Study Scope and Methodology

- **Clickstream Approach using Nielsen's Tools**
  - @plan
  - NetView Panel
  - Media Research
- **Survey Approach Developed by Nielsen and Google**
  - Google/Nielsen Boomers Survey fielded August 2010, N=3,878
- **Definitions**
  - Gen Y: 18-30
  - Gen X: 31-45
  - Boomers: **46-65**
  - G.I. Generation: 66-75
  - Silent/Lost Generation: 75+
- **Qualitative Research**
  - Sterling Brands: Online focus group of 15 Boomers

# Objectives of The Four Truths



- 1 How much media do Boomers consume?  
Which vehicles reach them the best?
- 2 What motivates Boomers to search and click?
- 3 What kind of videos are Boomers watching?
- 4 What influences a Boomer's purchase?

# The Truth about Boomers and Media



# Boomers Dominate the Screens

Average Hours Per Month of Viewing Time Across  
All Screens by Age Cohort Member

TV + Movie + Online Viewing + Mobile Video

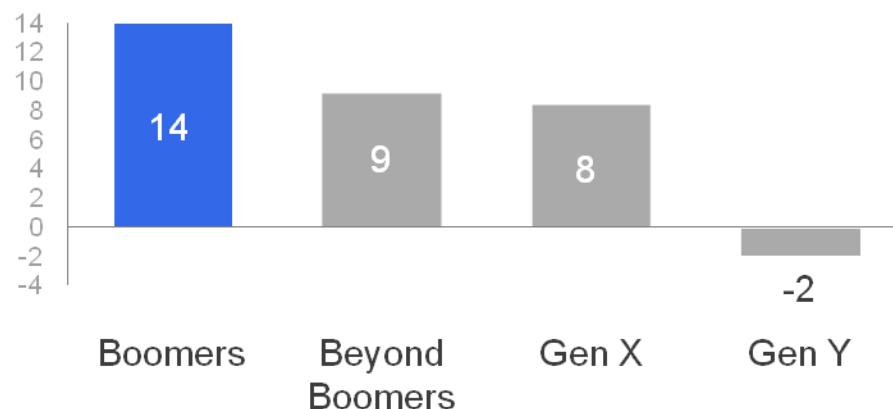


Source: Q1 2010 Three Screen Report, Nielsen Online NPOWER – Live +7 Total Screen Time July 2009 – July 2010nd Nielsen Online NetView Panel aggregated.

# Boomers Are the Largest TV Watching Group

**32%** share of TV viewing  
up from 23% in 1992

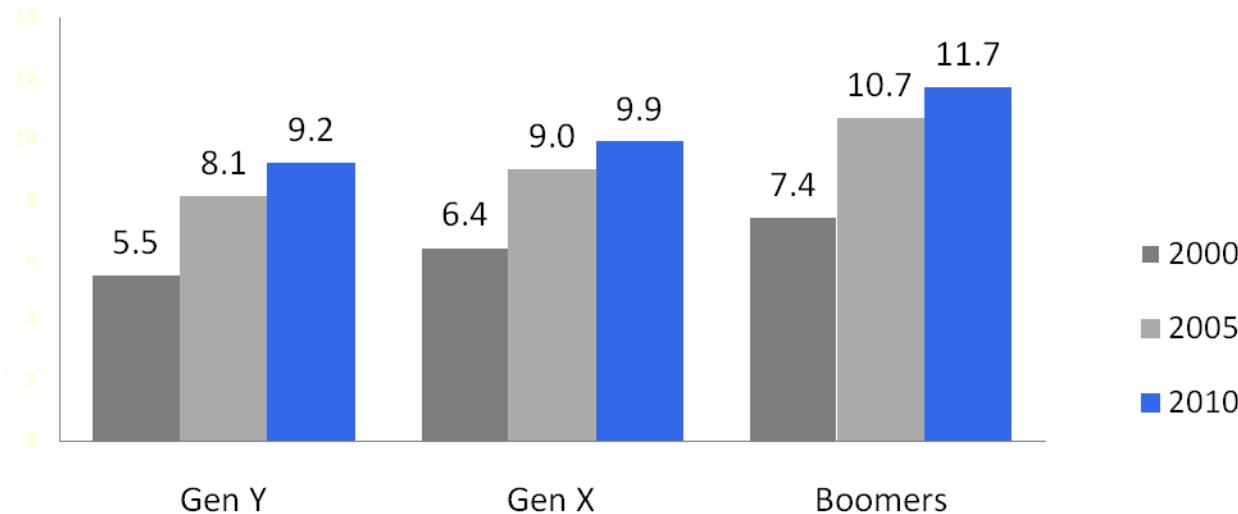
**Average % Change per Person in Live TV Minutes Viewed per Week 1992 to 2010**



Source: Nielsen Media Research Live US PUT% for 45-64 full year 1992 vs. 2010 thru July

# More Choices with Cable

% of TV Households average viewership at any moment



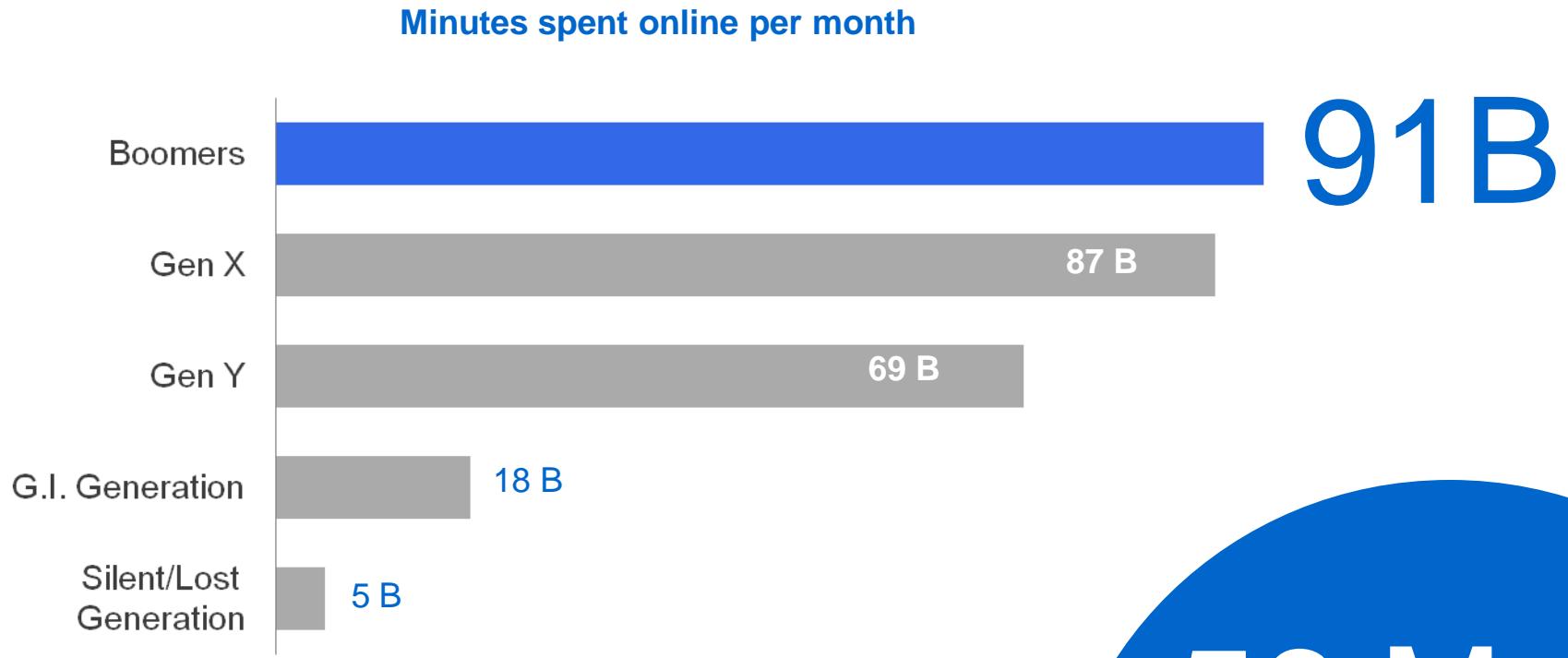
\*Ad Supported cable

**think**  
with Google

Source: Nielsen Media Research Live US PUT%

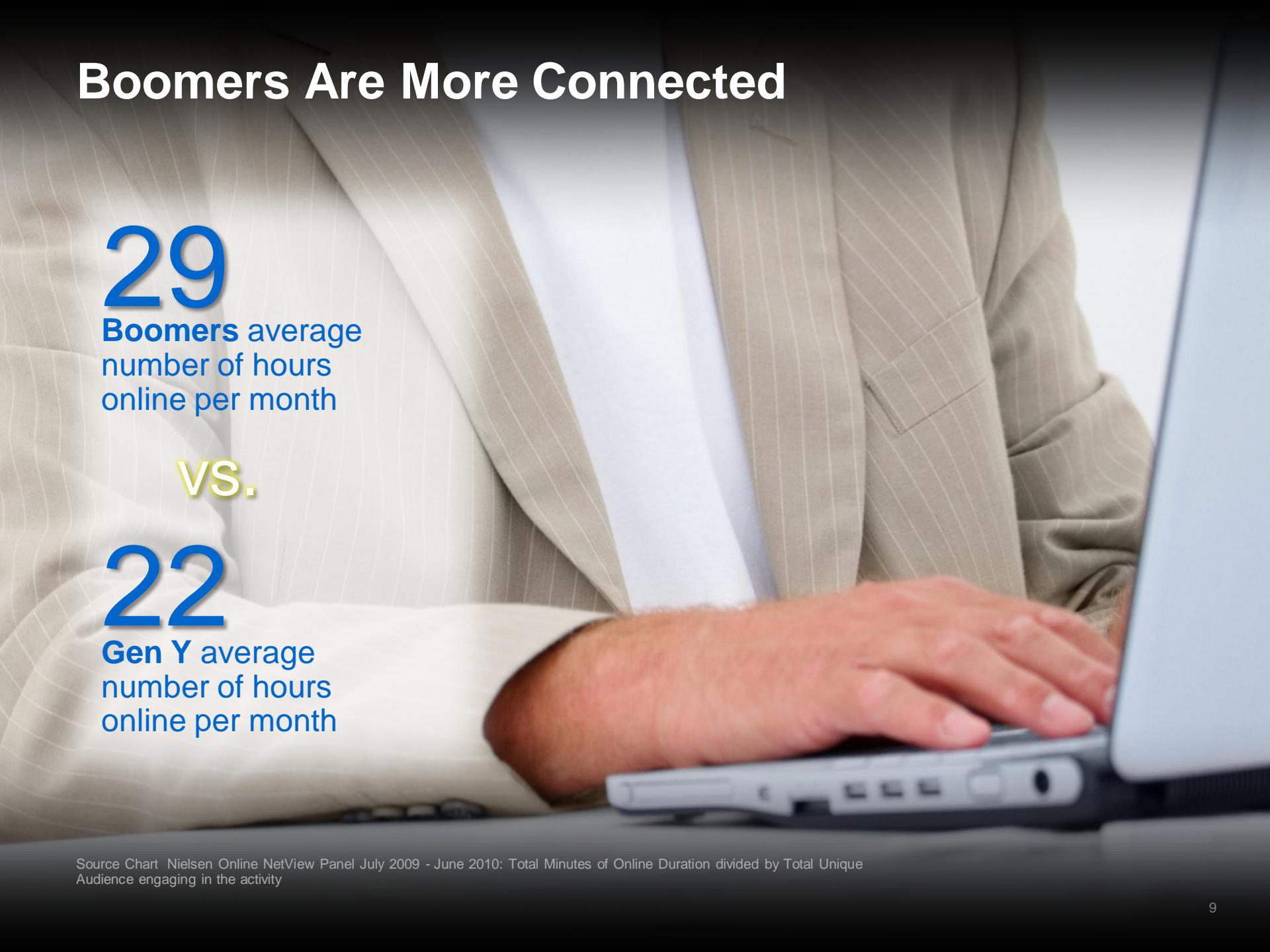
Data: 45-64, 18-29, 30-44 full year Ad Support Cable for 2000, 2005, and 2010 thru July  
Gen X = 18-29, Gen Y = 30-44, Boomers = 45-64

# Boomers Are the Largest Group Online



Source: Nielsen Online NetView Panel June 2010  
Data: Total Unique Audience and Minutes by Age Group

# Boomers Are More Connected



**29**

**Boomers** average  
number of hours  
online per month

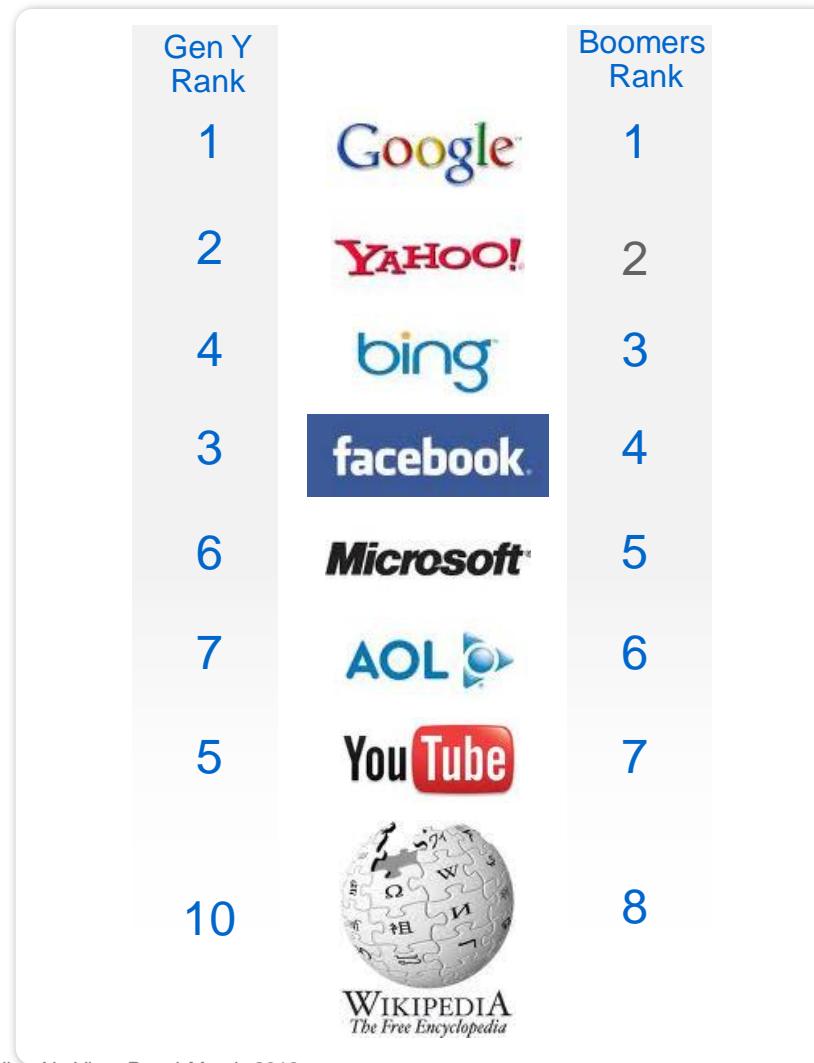
**VS.**

**22**

**Gen Y** average  
number of hours  
online per month

Source Chart Nielsen Online NetView Panel July 2009 - June 2010: Total Minutes of Online Duration divided by Total Unique Audience engaging in the activity

# Boomers and Gen Y Have Much in Common Online



8 out of 10  
Of the top websites  
are the same as  
18-34 year olds

Other Gen Y:  
Rank - Site

- Fox Interactive Media
  - Apple

Other Boomers:  
Rank - Site

- Ask Search Network
- Amazon

# Influences That Prompt Boomers to Go Online



**62%**

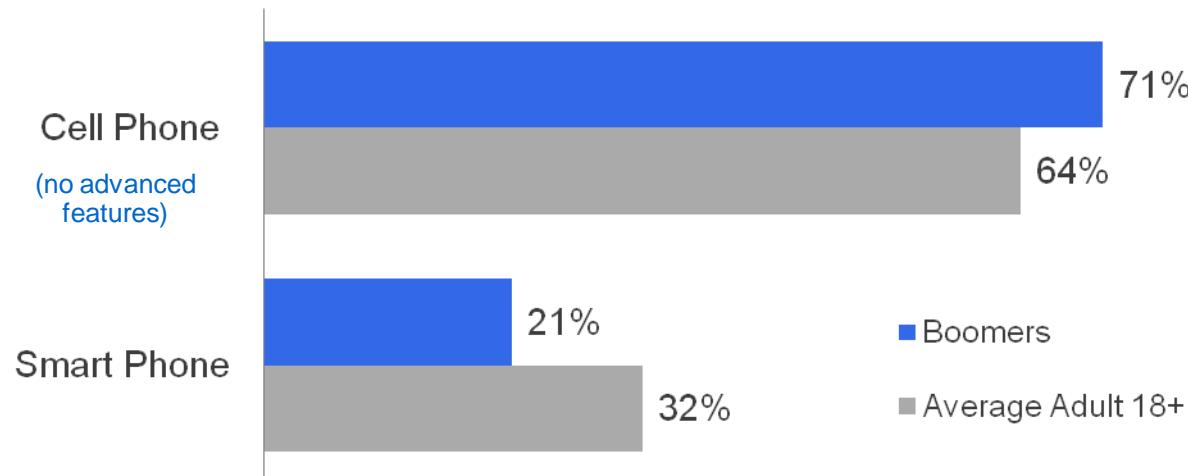
Of Boomers use the **internet** to look up information their **friends or family tell me** about

**55%**

of **Boomers** look up information with **others** in mind

# Boomers Get Acquainted with On-The-Go

Type of Mobile Phone Used Regularly



28%

Of Boomers **with children** in household regularly use smart phones

19%

Of Boomers **without children** in household regularly use smart phones

Source: Google/Nielsen Boomer Survey August 2010:  
Q4: Which of the following types of mobile phones, if any, do you use regularly?

Boomers N=2204, Adults 18+ N=3878.

Boomers without children in household N=1629, Boomers with children in household N=575.

# Families Boost Boomers' Adoption

We bought the Droid last week for **me and both my kids**. I **don't use a lot of the apps on my phone yet** because I just got it, but I'm looking forward to researching those. **I'm going to let my kids let me know what to do**. It takes so much time and effort to do it all by yourself; they have nothing but time."

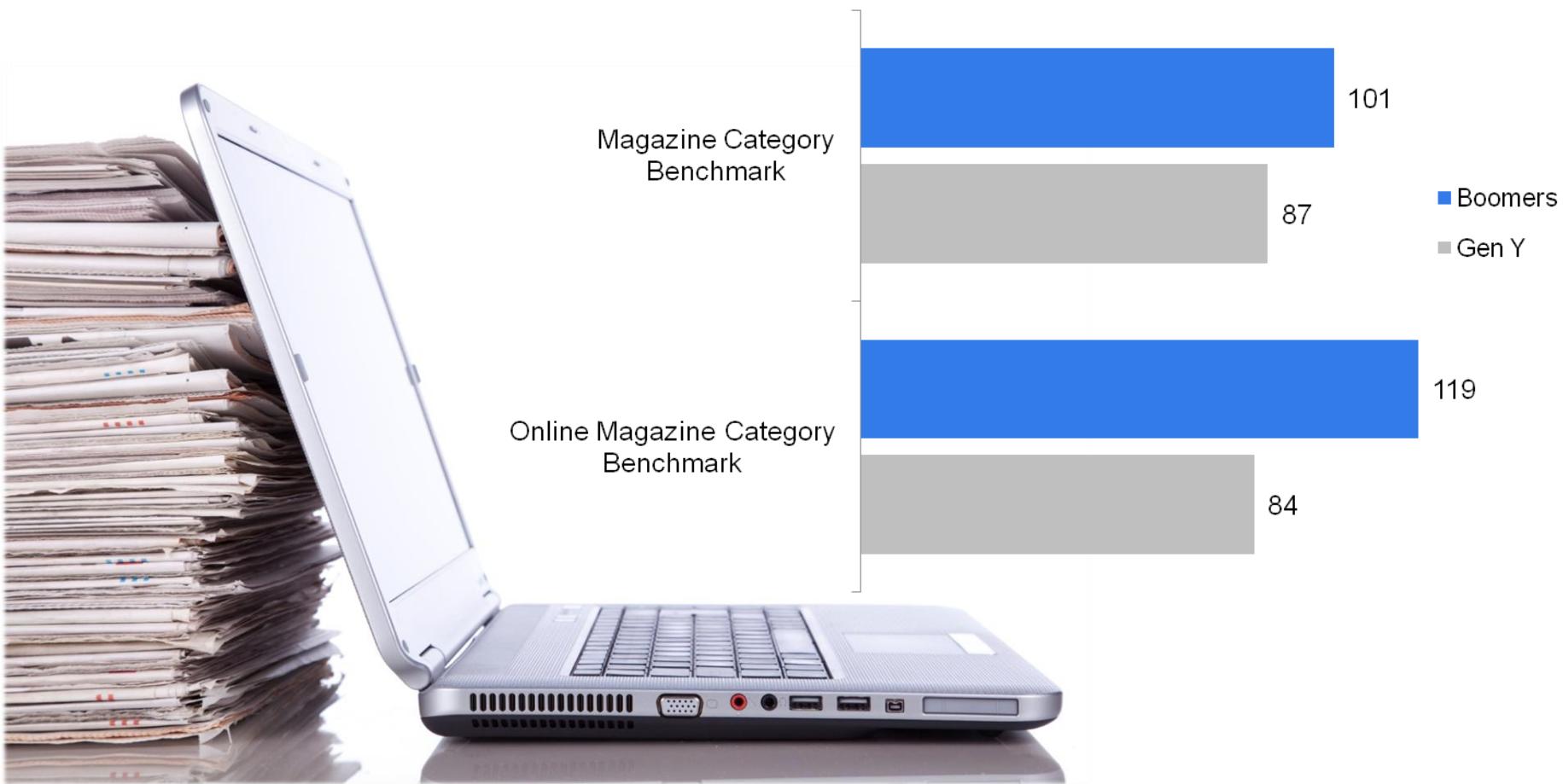
Jerry W., Age 52, Phoenix, Arizona

**My son and I** both got a Kindle One when they came out. Then we **both upgraded** to the Kindle Twos when they came out. **My mother** has my Kindle One and **my daughter** has the other Kindle.

Susan F., Age 55. West Jordan, Utah

# Boomers Straddle Between Traditional and New Age

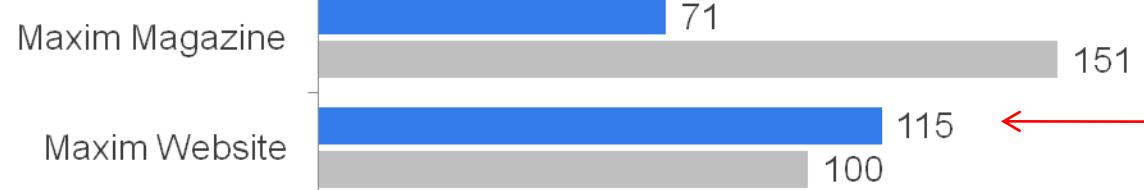
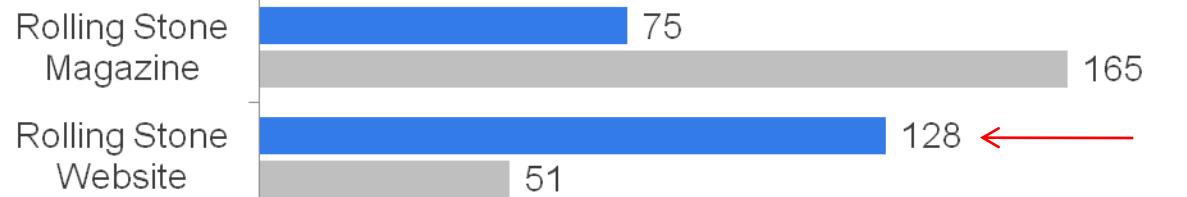
## Boomers Are Surprisingly Overindexing on the Magazine Online Sites



Source: Offline Stats: Nielsen Online @plan Panel Q1 2009 – Q1 2010 12 month average,  
Online Stats: Nielsen Online NetView Panel June 2010

# Familiar Brand Names Resonate With Boomers

Boomers Have More Interest in the Same Content Online vs. Offline Than the Younger Generations



Source: Offline Stats: Nielsen Online @plan Panel Q1 2009 – Q1 2010 12 month average,  
Online Stats: Nielsen Online NetView Panel June 2010

# The Truth about Boomers and Search



# Boomers Are Data Seekers

19

Gen Y average  
number of search  
sessions per month

23

Boomers average  
number of search  
sessions per month

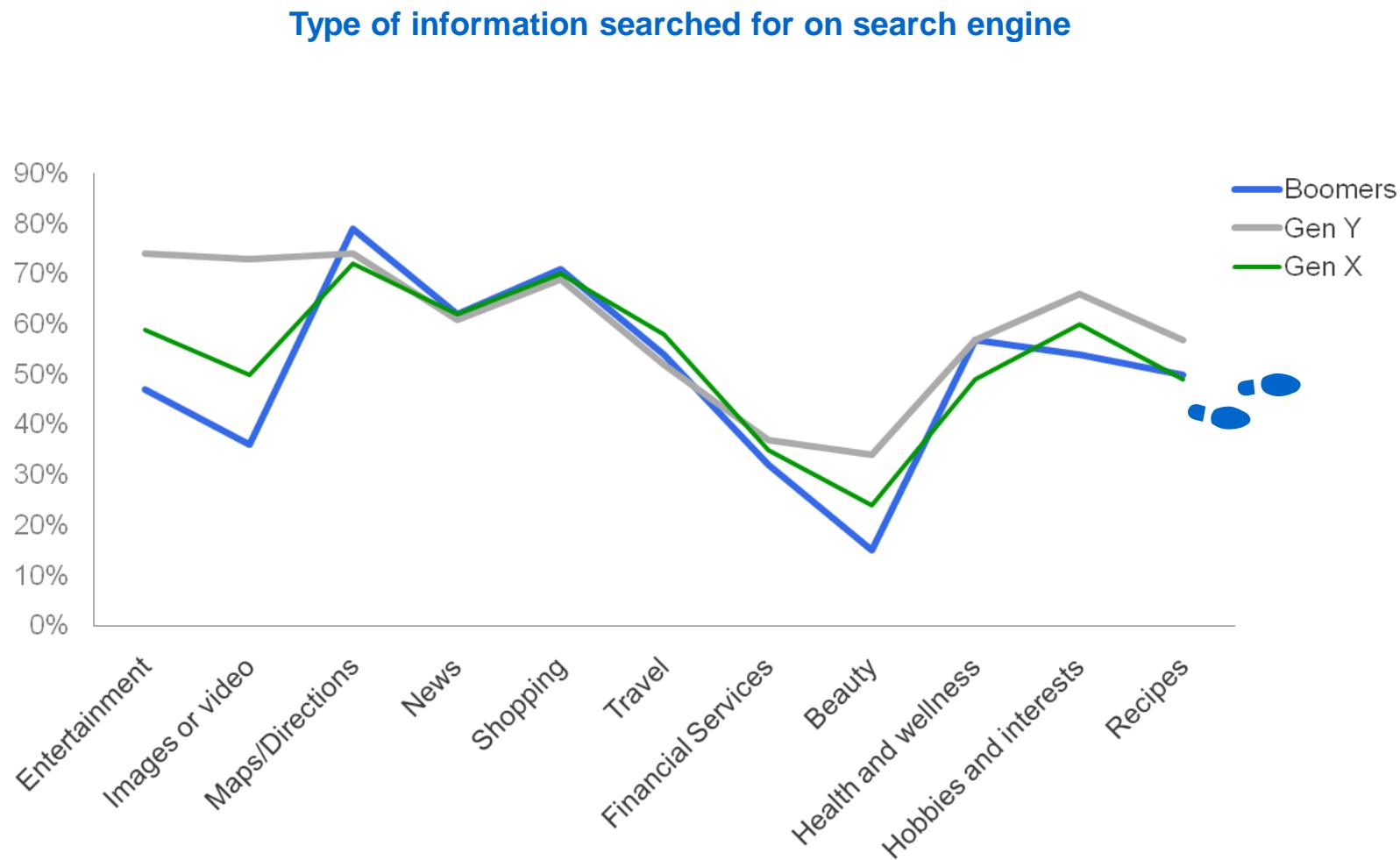
Source (chart): Nielsen Online NetView Panel July 2009 - June 2010  
Data: Total Searches/Unique Audience/Searches per Search Session

# The Internet Harnesses Family Time

"I research everything [online] from new recipes and cooking, if I want creative table decorations, **if I want to do some crafts with the grandkids**, different types of medications... It is very easy for me to get that information. I am doing some sort of search 2 or 3 times a day, I get my answers quick and easy"

-Shirley S, 58, Dallas, Texas

# A Comparable Online Search Footprint

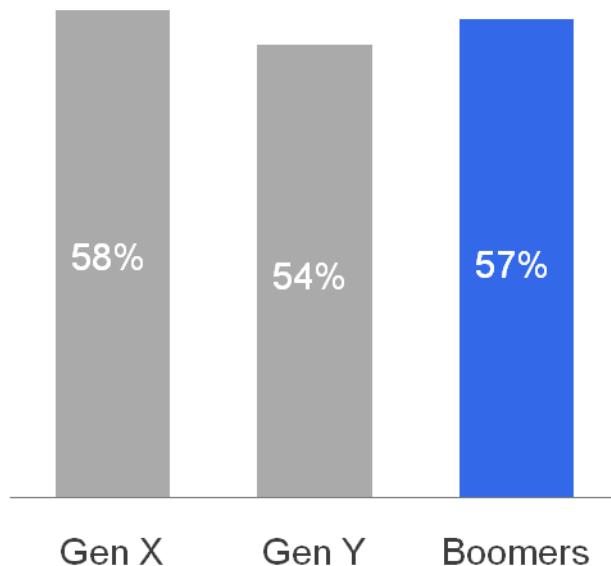


# TV is an Effective Trigger to Search

**57%**

of Boomers have searched  
after seeing something on TV

**% Who have used a search engine  
after seeing something on TV**



Source: Google/Nielsen Boomer Survey August 2010:  
Q17: Have you ever used a search engine to find more information on something that you saw featured on TV?" Percentage  
answering "Yes".  
Gen Y N=265, Gen X N= 639, Boomers N= 2175.

# Sponsored Links Speak to Boomers

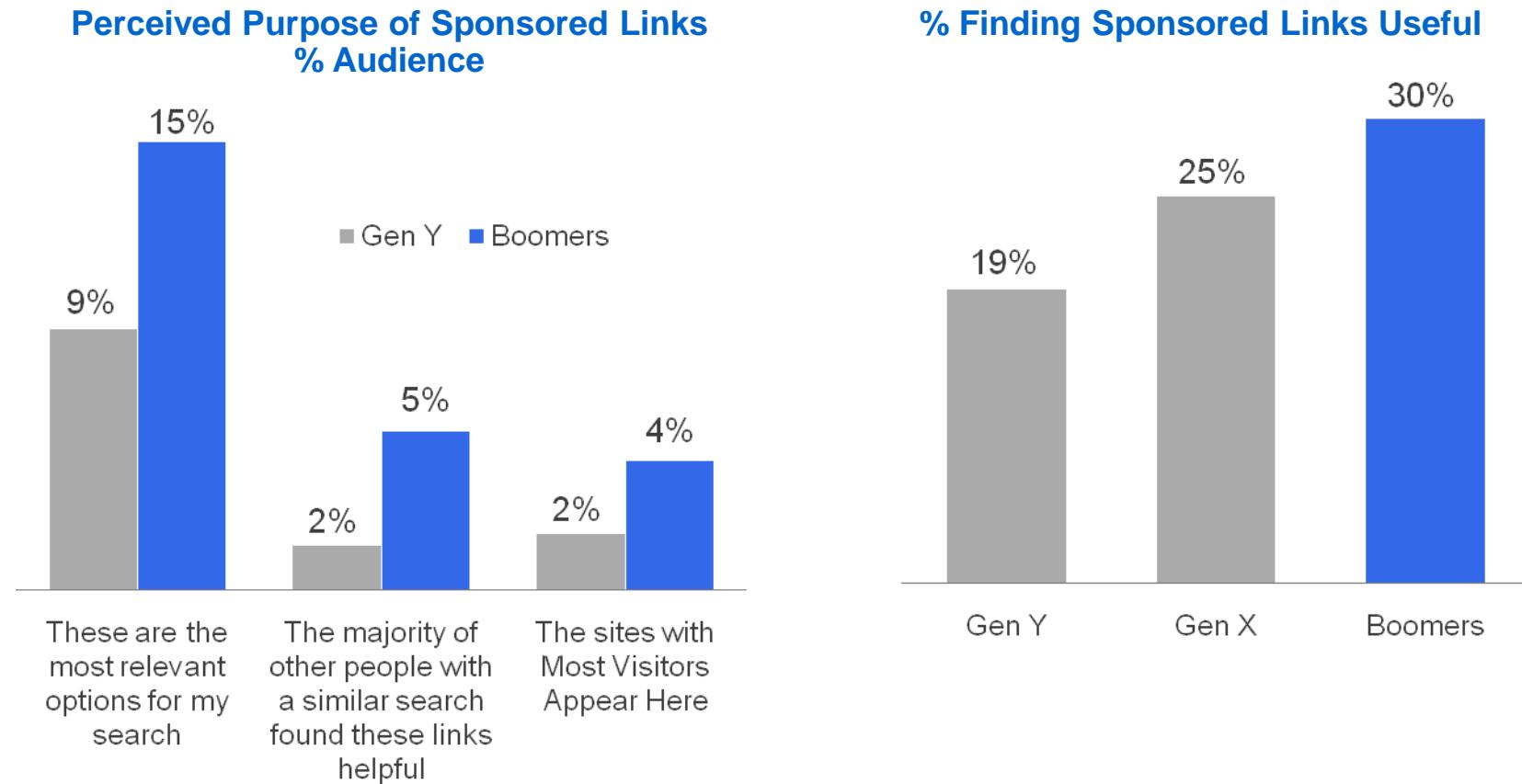
**69%**  
**Boomers** click on  
sponsored links

**58%**  
**Gen Y** click on  
sponsored links



Source: Google/Nielsen Boomer Survey August 2010:  
Q21: "Have you ever clicked on links that typically appear in the sections highlighted in red?" Respondents who answered 'Yes'.  
Gen Y N=265, Boomers N=2175

# Boomers Find Sponsored Links Relevant and Useful



Source: Google/Nielsen Boomer Survey August 2010:

Q19: What one reason best explains why these listings appear prominently at the top of the page or to the right of the other listings?

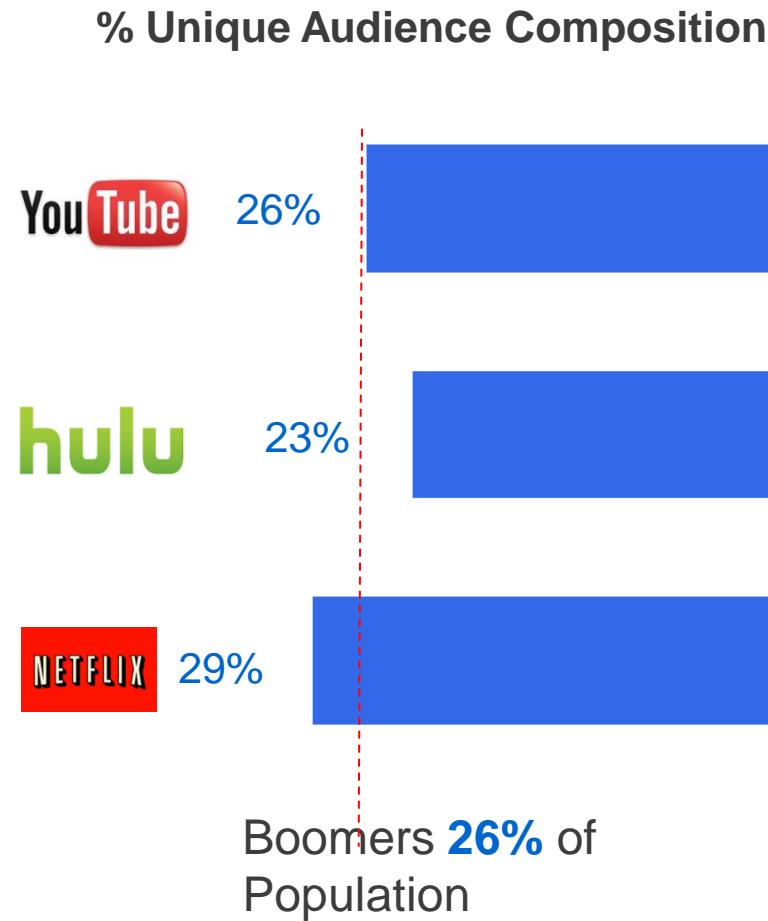
Q20: Thinking about a typical internet search results page like this one, how useful do you typically find results in the highlighted section? Top 2 box (out of 5):

Gen Y N = 265; Gen X N = 639; Boomers N = 2175

# The Truth About Boomers and Video



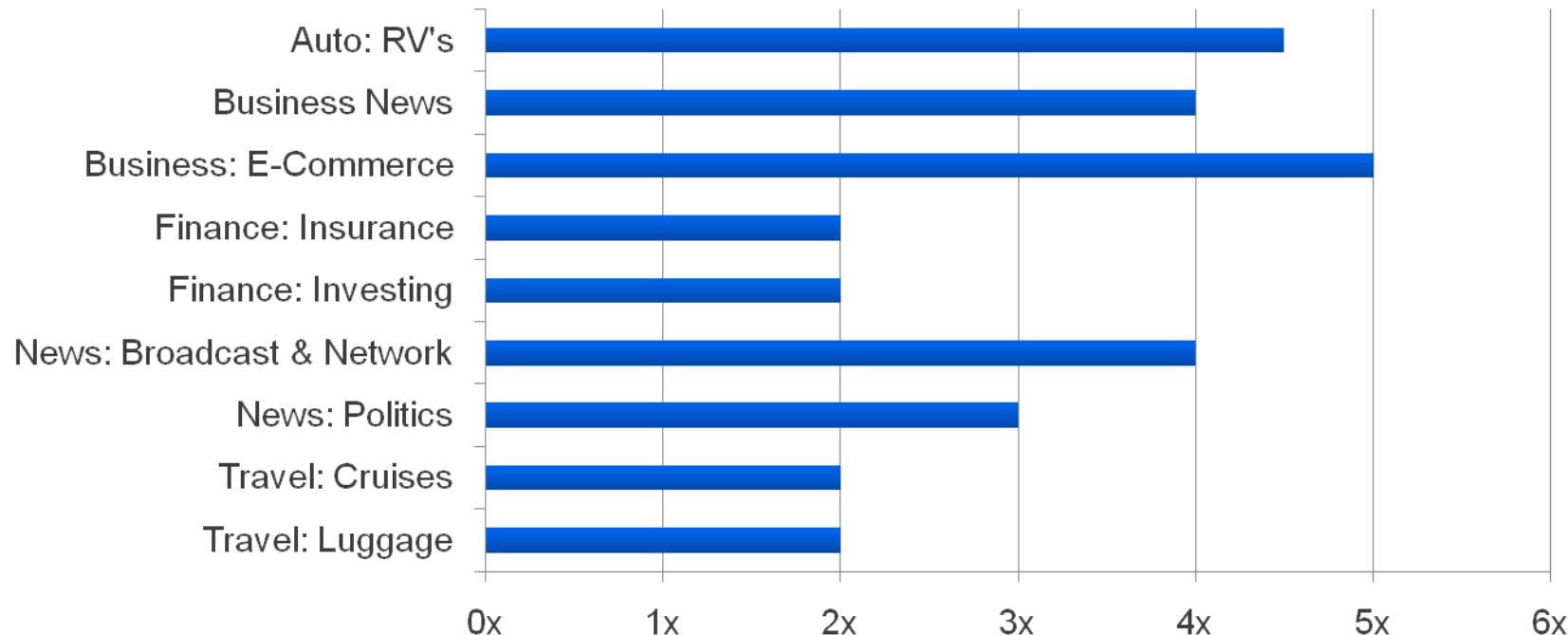
# Boomers Embrace Their Fair Share of Video



Source: Nielsen Online NetView Panel June 2010  
Data: Unique Audience Composition Percentage  
Population Percentage: US Census June 2010

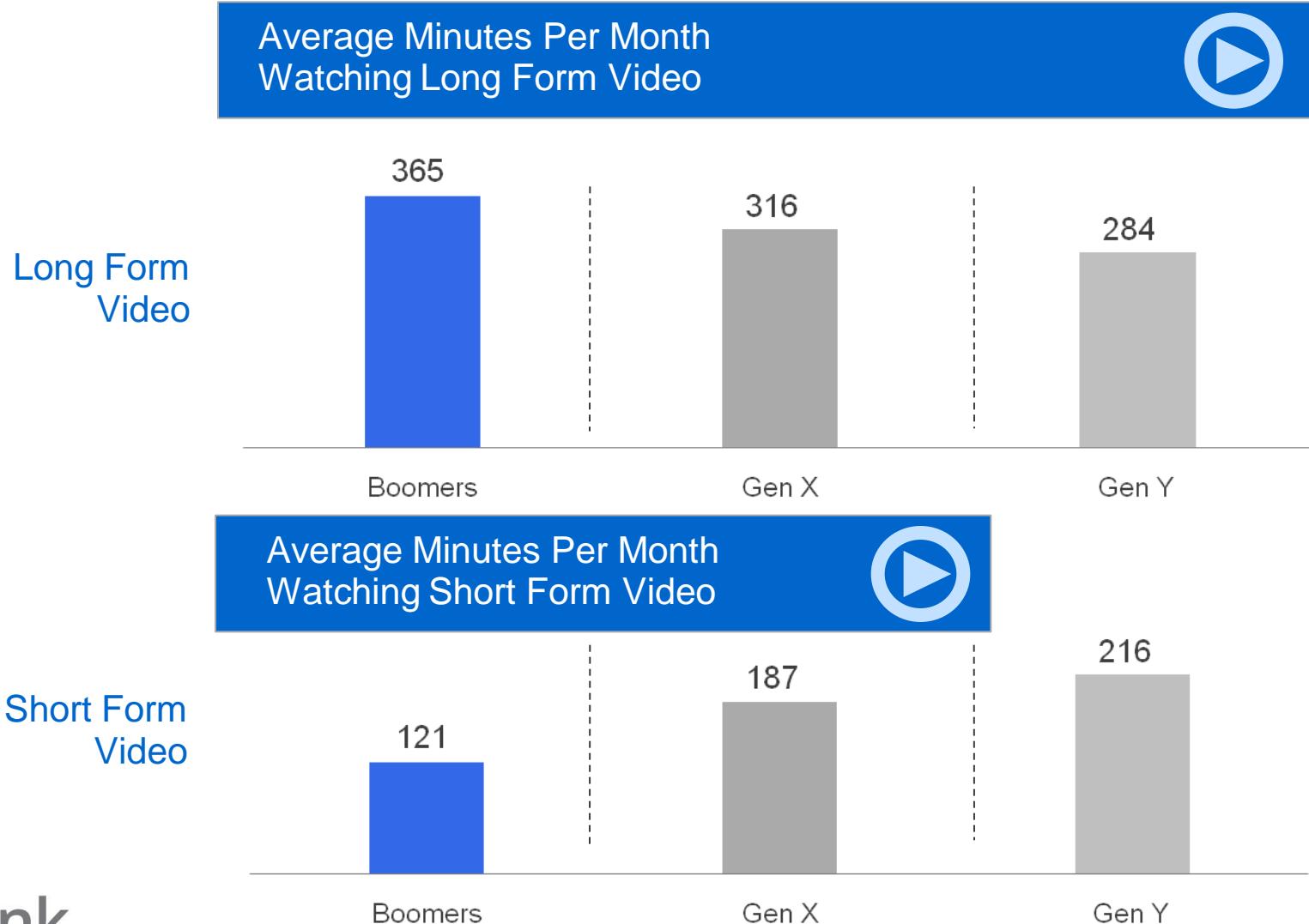
# Boomers' Video Interests on YouTube

Males and Females ages 45-64 YouTube Viewing Index



Source: YouTube Video Targeting Tool Oct 2010

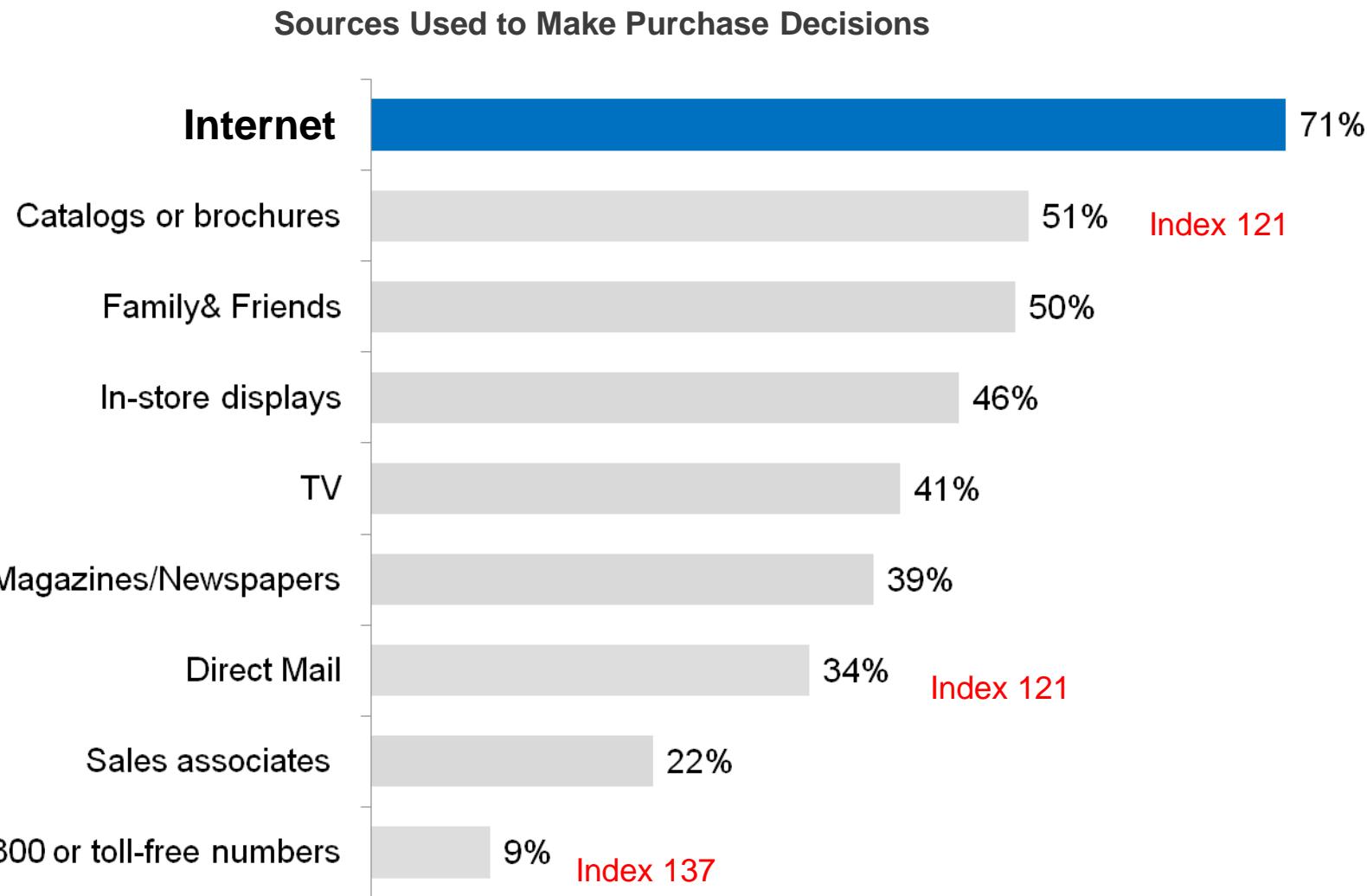
# Boomers Prefer to Stay Engaged Longer



# The Truth About How Boomers Buy



# Traditional Tactics Still Work on Boomers...



# ...But Boomers Are Empowered **To Follow Up the Old with the New**

**44%**

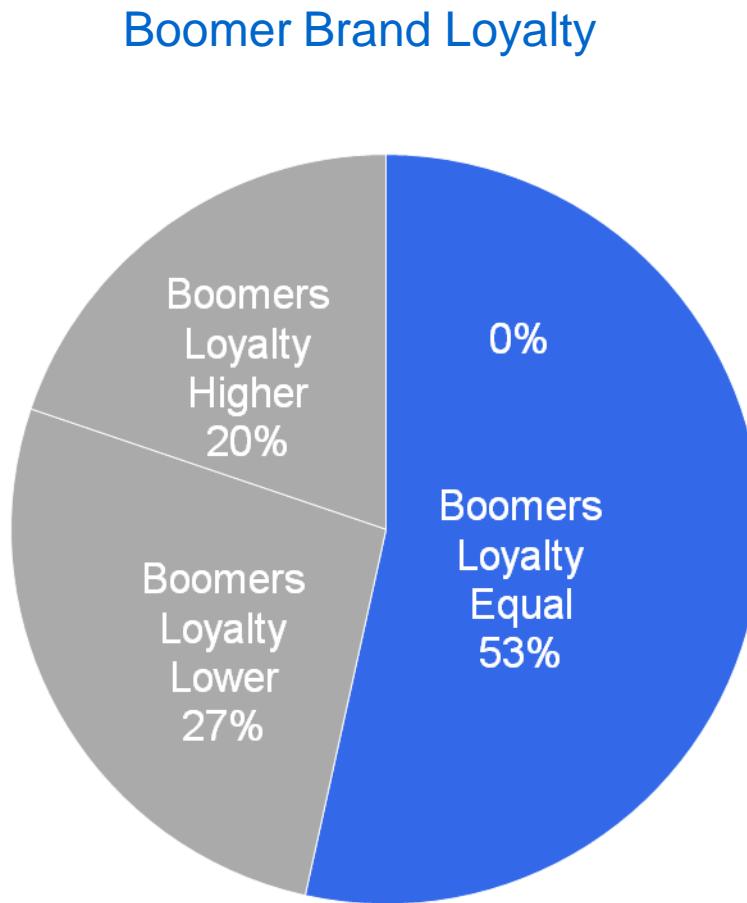
Of Boomers used a **search engine** to find out more about something they read about from mail **sent to the house**



Source: Google/Nielsen Boomer Survey August 2010:

Q17: Have you ever used a search engine to find more information on something that you: read about from mail sent to your house Asked among respondents that use search engines. N =2175

# Boomers Are Open to Change

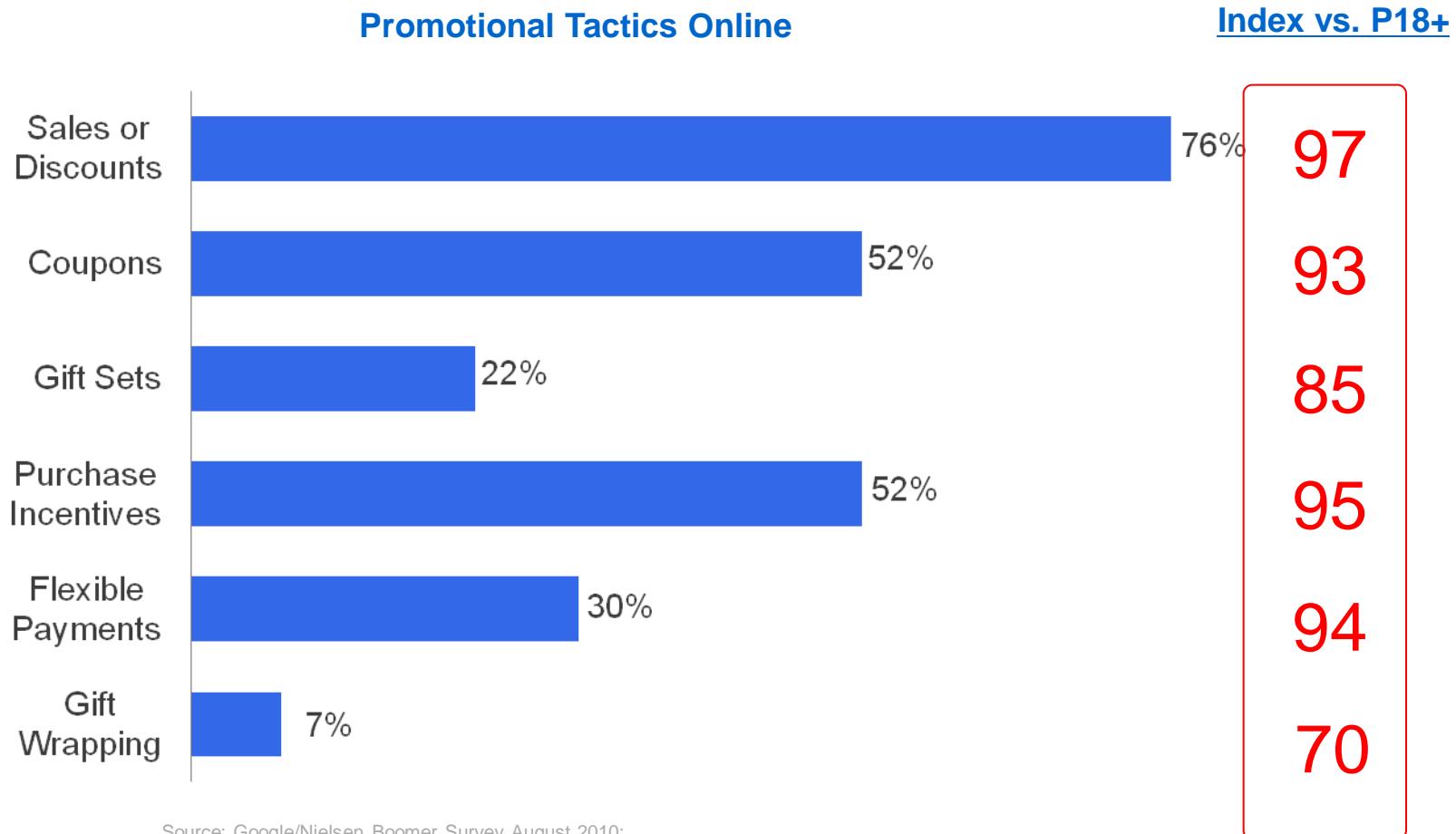


80%

Of Boomers are **equal or less loyal** than other age groups

Source: Nielsen Homescan 2008  
Percentages compared Boomers to younger and older Heads of Households (Younger than 44 age of Head of Household AND Older than 62 age of Head of Household)

# Online Deals are Nice, But Not Necessary



# Quality Time is High On The List With Boomers

55%

Of Boomers pay the **entire bill** for family vacations where they are traveling with the extended family



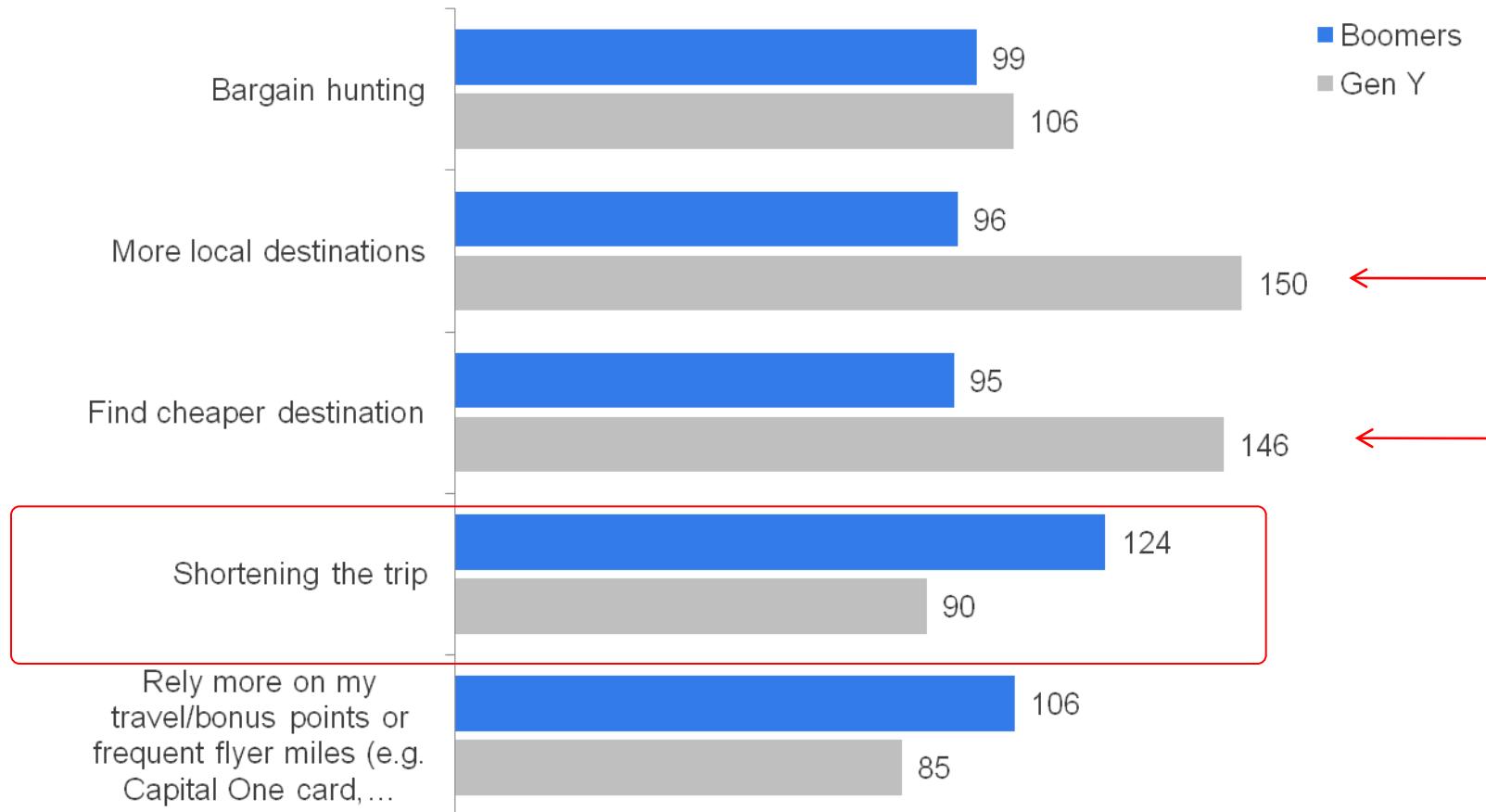
Source: Google/Nielsen Boomer Survey August 2010:

Q56: Thinking about the trips that you or you and your spouse will be taking with your extended family, who will be paying for these trips? Among respondents planning to travel with extended family.

N=486

# Quality Beats Price For Boomers

Strategies Used to Spend Less Money on Travel in 2010



Source: Google/Nielsen Boomer Survey August 2010:

Q54C: You mentioned that you feel that you have less money to travel with in 2010. Based on this, which of the below strategies would you say that you are applying to address your situation, if any?  
Gen Y N=28 , Boomers N=307

# Boomers Spend Online

**50%** of Boomers spend over **\$500** online a year



Source: Google/Nielsen Boomer Survey August 2010:  
Q40: Question Number 40: Approximately how much have you spent online in the past year? \*\*asked only of those that purchase online about once a year or more .  
N = 2094

# Boomers Spend on Enjoyment

Travel,  
business,  
entertainment  
categories over-index  
with heavy Boomer  
online spenders

## Categories where Boomers Spend Most

Index vs. Average  
online adult 18+

	Collectibles	138
	Gourmet Food	132
	Auctions	118
	Hotels Index	118
	Airline Ticket	115
	Car Rentals	116
	Computers & Printers	114
	Entertainment	108

Source: Nielsen Online @plan Panel January 2009 – January 2010

# Boomers Are Changing Online Commerce

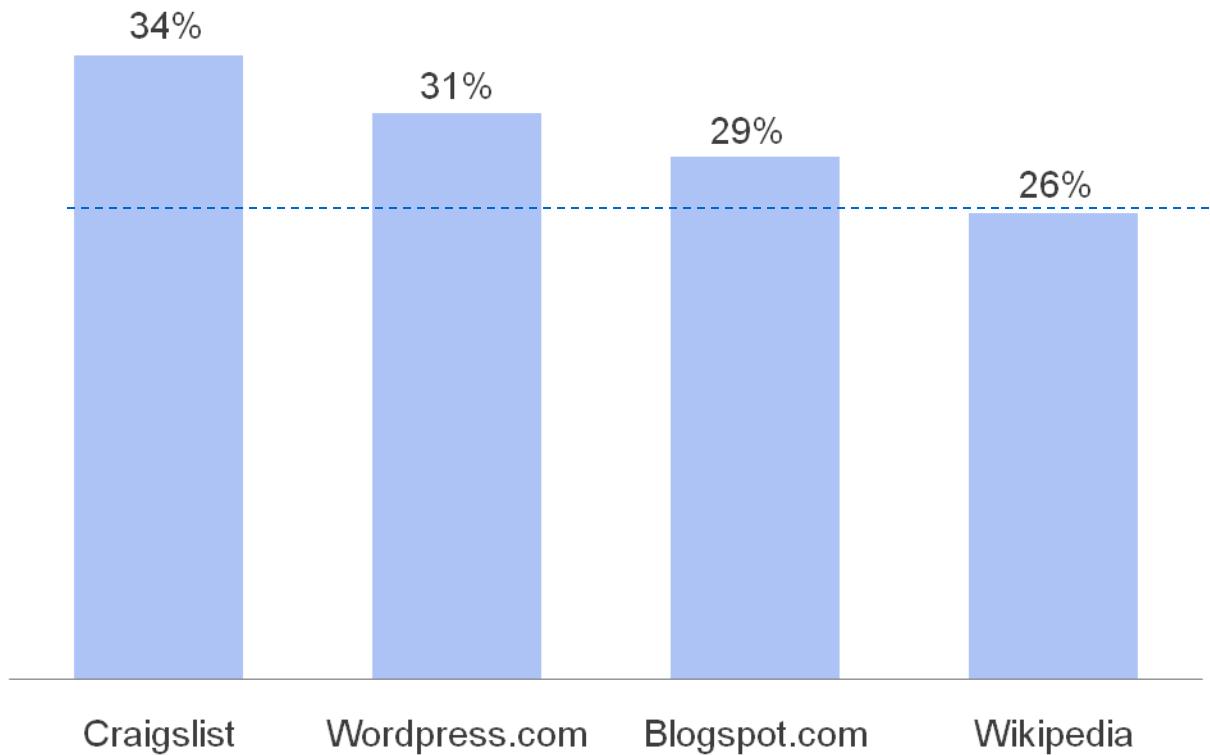
Unique Audience Composition percent for each website listed



Source: Nielsen Online NetView Panel June 2010  
Data: Unique Audience Composition percent for each website listed  
Population Percentage: US Census June 2010

# Boomers Value High Utility

Percent share of online minutes for each website listed



Boomers  
**26%** of  
Population

# The Four Truths about Boomers

# Marketing Underpinnings

- 1** Boomers are sponges for content and media.
- 2** Boomers sit on an aided adoption curve with technology.
- 3** Boomers are most comfortable straddling the familiar and the new.
- 4** Boomers are a curious and thoughtful demographic that value quality and family time.

Boomers are an easy target for advertisers. Saturate them with relevant content.

Show, don't tell and market to those that give them a boost on the curve.

Marketers can experiment but within the comfort zone.

Market not only to Boomers but the people they care about.

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