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The Inside Look into the Beauty Boomer

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

Study Scope and Methodology

- **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
 - **Beauty Boomers = Baby boomer beauty decision makers**
 - G.I. Generation: 66-75
 - Silent/Lost Generation: 75+

Executive Summary

Beauty Boomers are comfortable with their age, and prioritize feeling good over looking good

Marketers have a captive audience with Beauty Boomers when planning search campaigns and brand websites

Online engagement has a powerful impact on shopping Beauty Boomers' shopping, whether via research or incentives

Beauty Boomers Know Age is Just a Number

76%

Are comfortable with their age

52%

Feel younger than their actual age



Source: Google/Nielsen Boomer Survey August 2010:
Q41:Please rate how much you agree with the following
statements: "I am comfortable with my age" Respondents who
"Agree Somewhat/Completely", Beauty Boomers N=1239,
Q42: Regardless of your current age, how old do you feel?
Beauty Boomers: N= 854

Beauty Boomers Are Satisfied Without Pampering

60%

Believe their physical appearance is very important

38%

Take time to pamper themselves

50%
vs
28%

Look for products that make them feel their best versus look younger

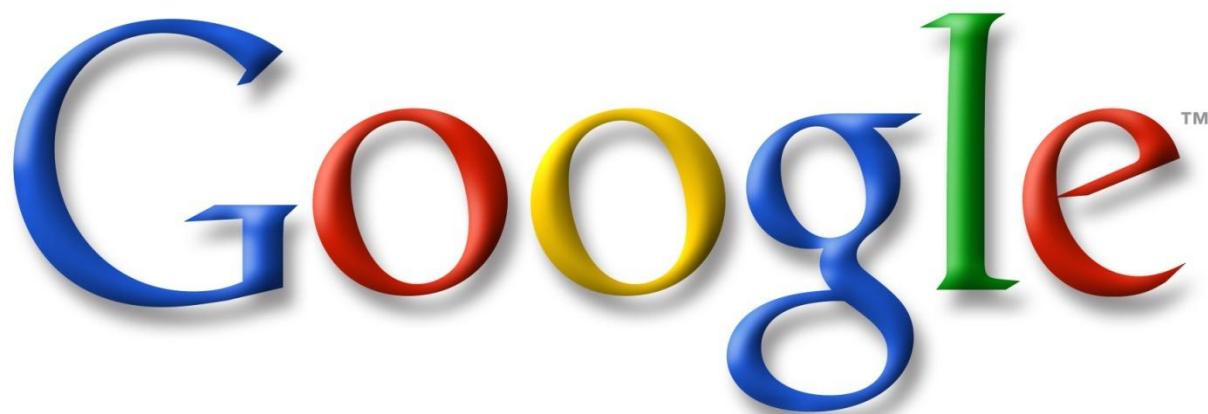
Source: Google/Nielsen Boomer Survey August 2010:

Q41:Please rate how much you agree with the following statements, Respondents who "Agree Somewhat/Completely" "My physical appearance is very important to me",Beauty Boomers N=989,
"I take the time to pamper myself", Beauty Boomers N= 628

Q44.1 and 44.2: When making decisions about beauty /cosmetics items, how often do you look for products that always/frequently ...make you feel your best N= 821, ...products that make you look younger N=463

Beauty Boomers Rely on Search

99% of Boomer Beauty decision makers use a search engine



81% of Boomer Beauty decision makers use Google

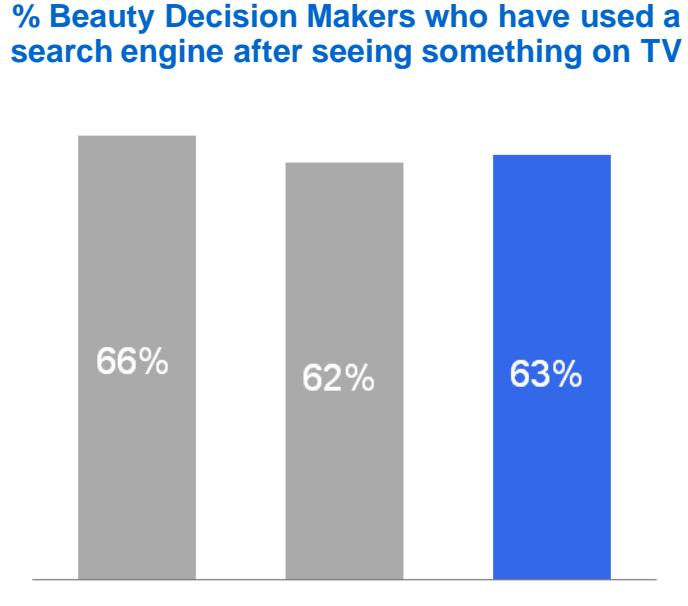
Google Search

I'm Feeling Lucky

Source: Google/Nielsen Boomer Survey August 2010:
Q10: Which of the following search engines, if any, do you use?
Any: N=1623, Google N=1335

TV Is an Effective Trigger to Search

63% of Boomer Beauty decision makers have searched after seeing something in a TV commercial



45% of Boomer Beauty decision makers always or frequently watch TV and use the internet at the same time

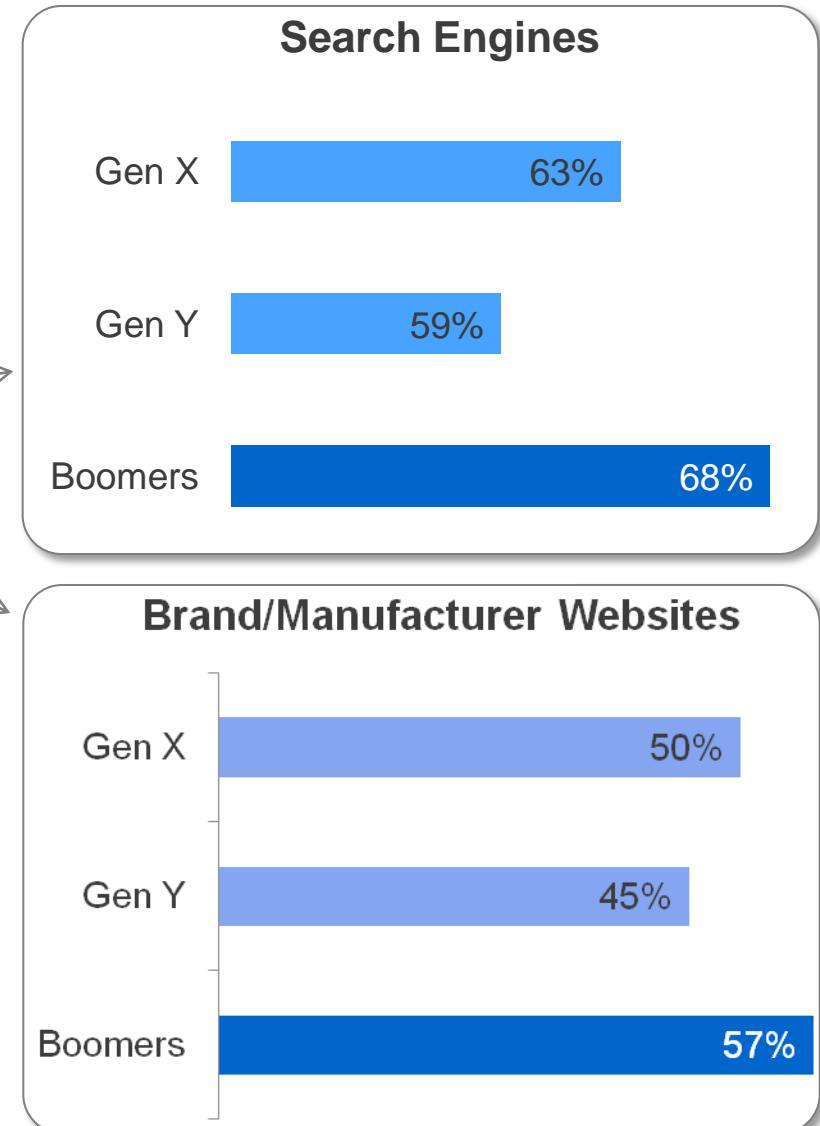
Source: Google/Nielsen Boomer Survey August 2010:
Q17: Have you ever used a search engine to find more information on something that you saw on a TV commercial?" Percentage answering "Yes". Beauty decision makers: Gen Y N=143, Gen X N= 323, Boomers N= 1016.
Q24 How often do you engage in other activities at the same time you are using the Internet? % answered "Always/Frequently" Boomers, N=736.

Beauty Boomers Rely on Search Engines and Brand Websites More Than Younger Counterparts

Ranking of Online Sources for Purchase Decisions

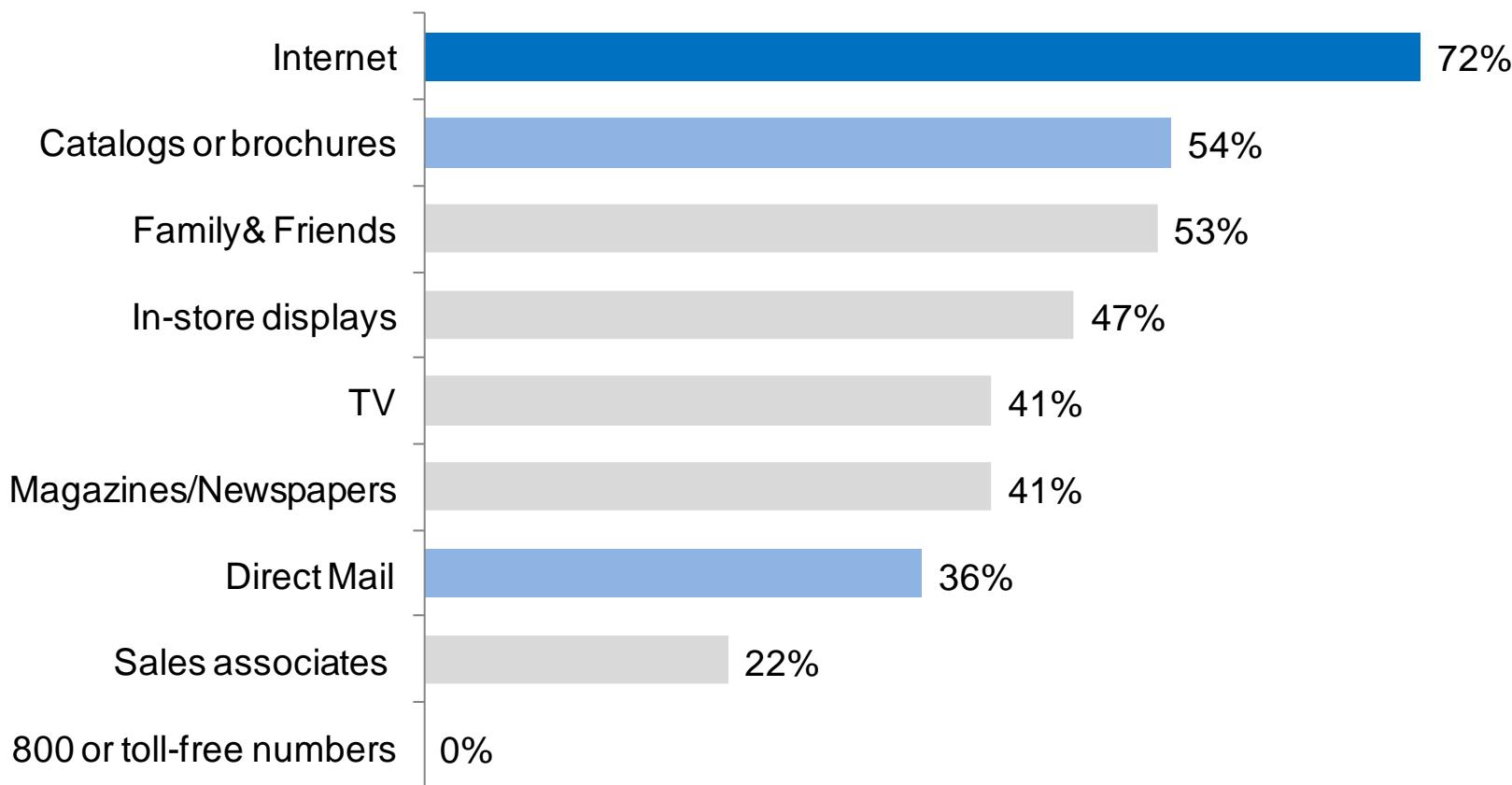
- 1 Search engines
- 2 Store websites
- 3 Brand or manufacturer sites
- 4 Online-only retailer sites
- 5 Shopping comparison sites
- 6 Online auction sites
- 7 Online review sites

Source: Google/Nielsen Boomer Survey August 2010:
Q35: Now, thinking only about online sources of information, how useful to you, if at all, are the following when making your shopping or purchasing decisions?
Base= Beauty Boomers who use online source N=1176



Online Research Is a Powerful Shopping Tool for Beauty Boomers

Sources Used to Make Purchase Decisions



Source: Google/Nielsen Boomer Survey August 2010:
Q35: Which of the following sources of information, if any, do you typically use when shopping or making purchasing decisions?
Beauty decision makers, N= 1507 (any)

Beauty Boomers Look to Others to Inform Purchase Decisions via Video

Types of Online Videos Viewed While Shopping or Making Purchasing Decisions



Free Shipping Removes a Barrier for Beauty Boomers

Online Promotional Tactics Beauty Boomers Find Most Motivating



Source: Google/Nielsen Boomer Survey August 2010:
Q38B: Please indicate how motivating each of the following would be in impacting you to purchase something online.
% responding "Very/Extremely motivating"
Boomers N=1646
Average Adults 18+ N= 3878 ,Boomers N=2204

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