



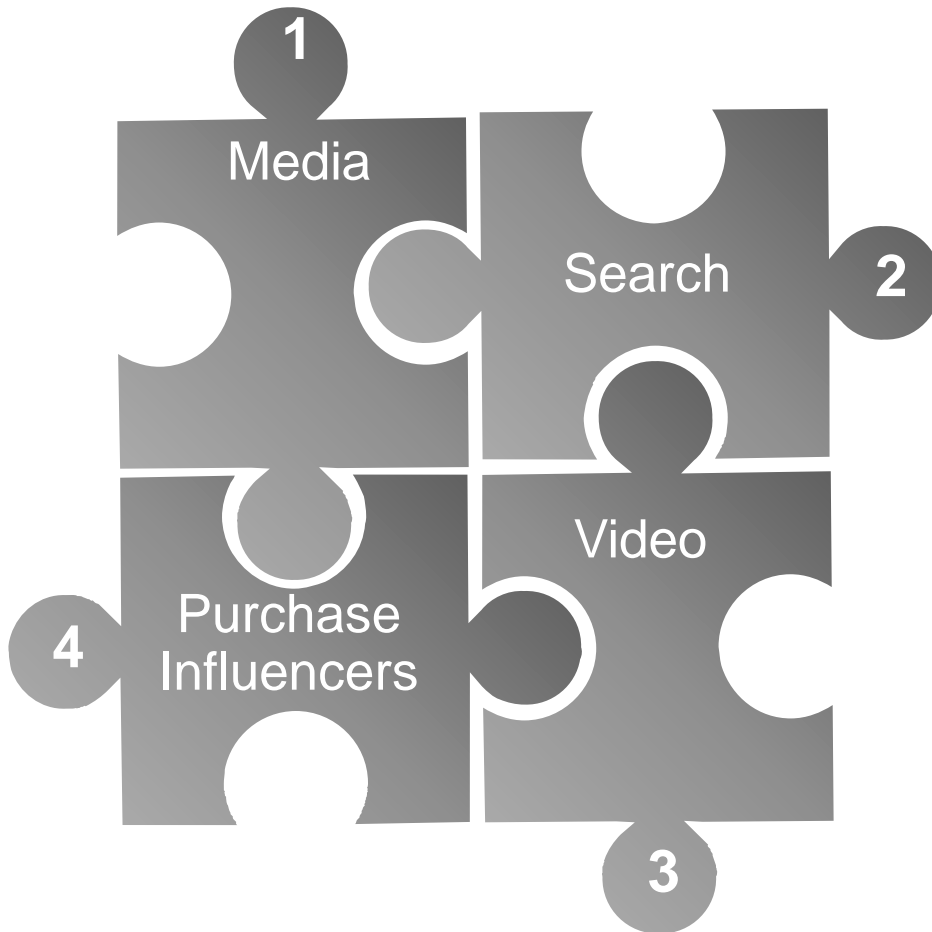
The 4 Truths About Boomers & Media

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

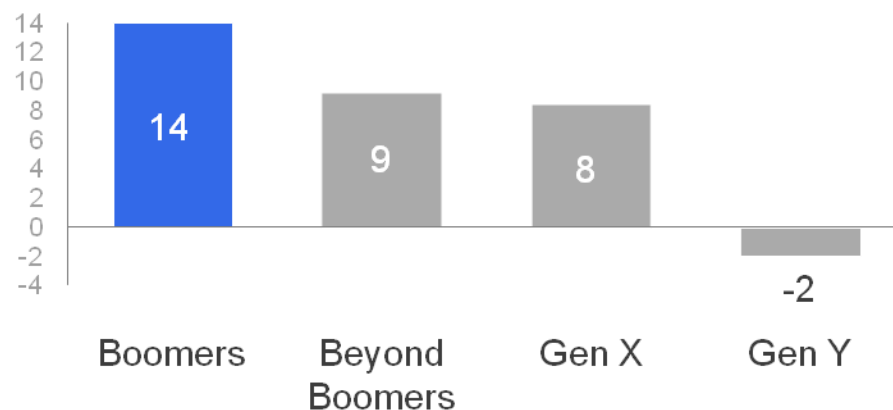


Source: Q1 2010 Three Screen Report, Nielsen Online NPOWER – Live +7 Total Screen Time July 2009 – July 2010nd Nielsen Online NetView Panel aggregated.

Boomers Are the Largest TV Watching Group

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

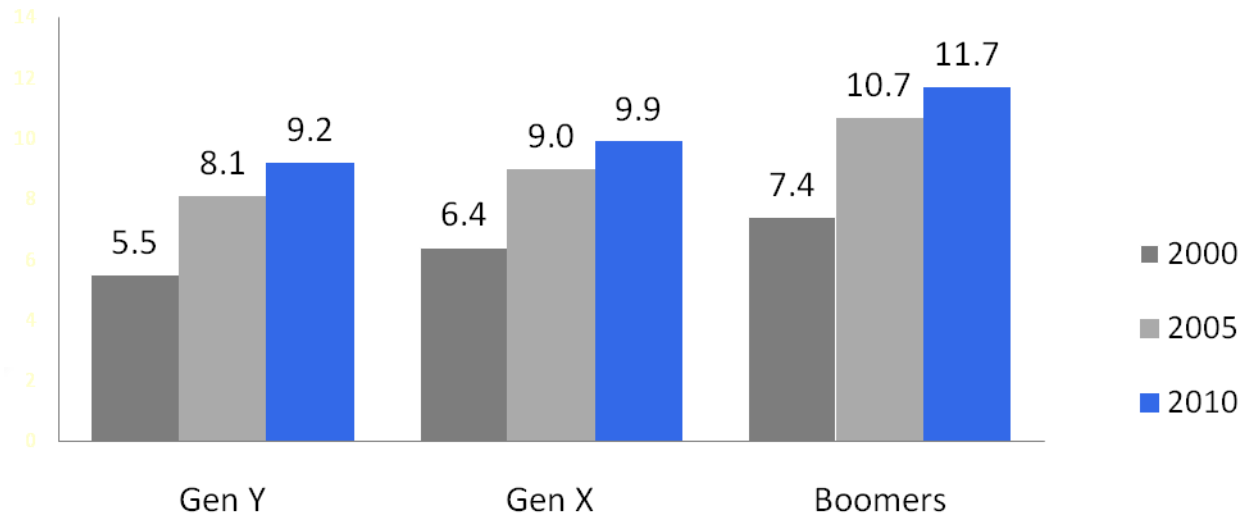
Average % Change per Person in Live TV
Minutes Viewed per Week 1992 to 2010



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



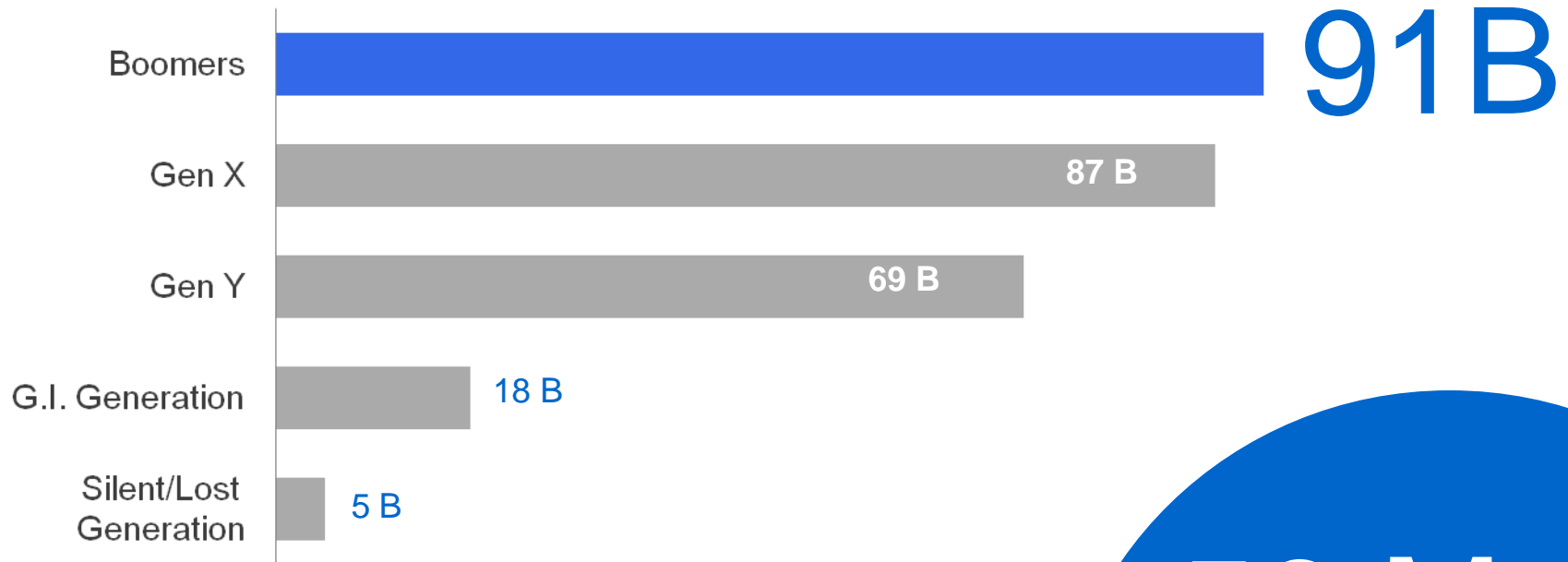
*Ad Supported cable

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

Minutes spent online per month



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

56 M

Estimated number
of Boomers online
June '10

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

Gen Y Rank		Boomers Rank
1	Google	1
2	YAHOO!	2
4	bing	3
3	facebook	4
6	Microsoft	5
7	AOL	6
5	YouTube	7
10	WIKIPEDIA The Free Encyclopedia	8

8 out of 10

Of the top 10 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%

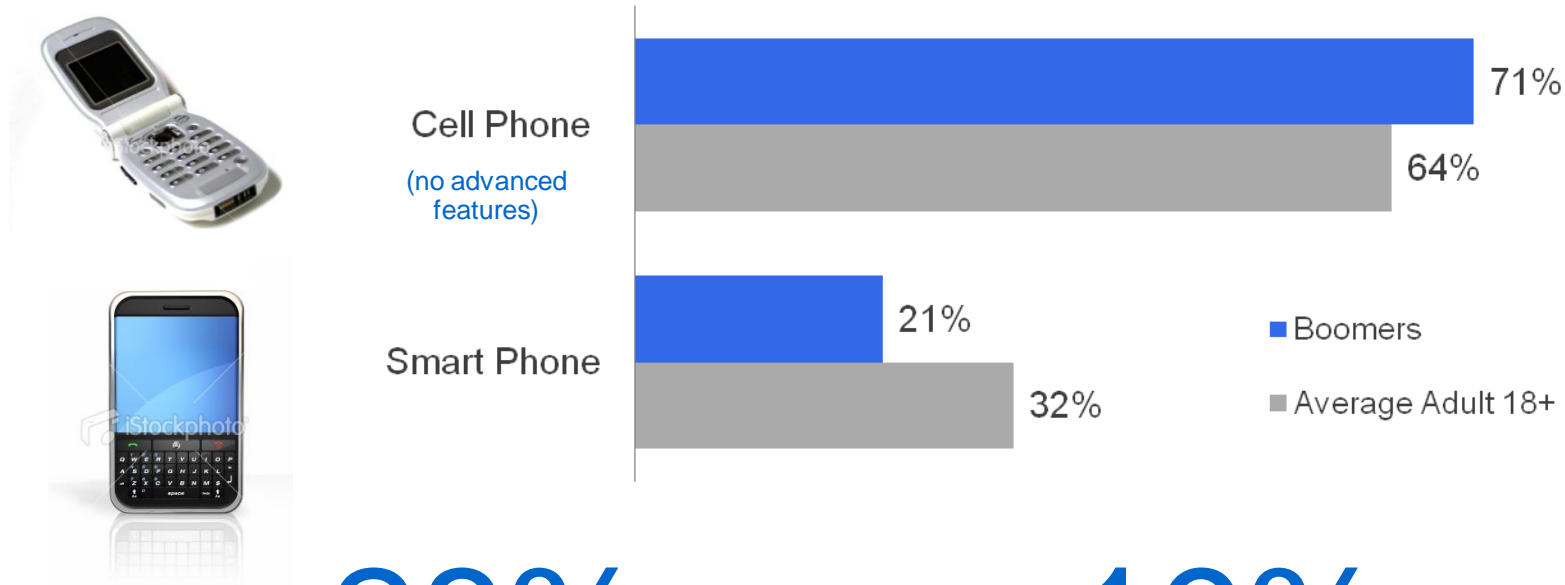
Of Boomers use the **internet** to look up information their **friends or family tell me** about

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

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.**"

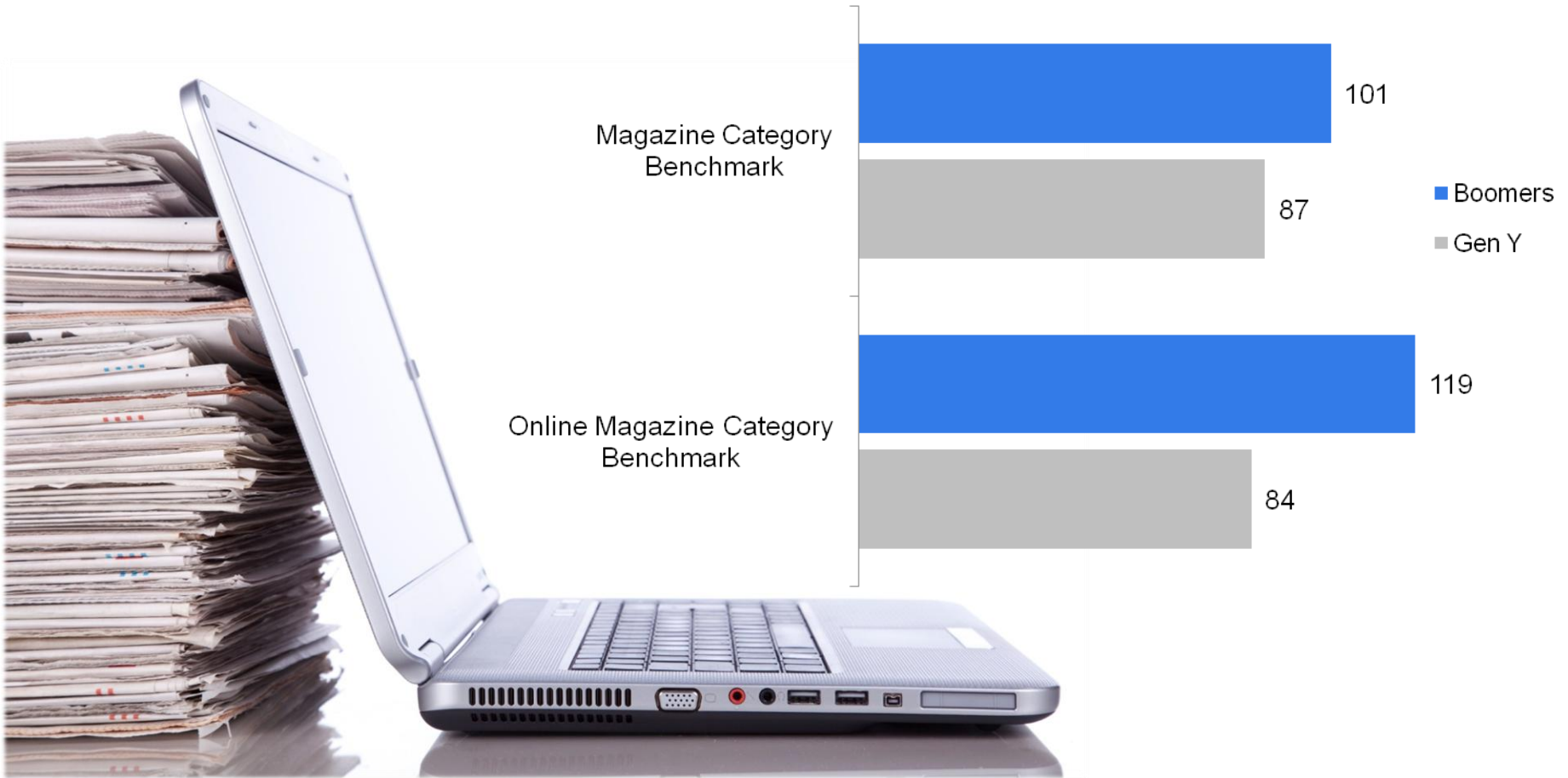
Jerry W., Age 52, Phoenix, Arizona

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

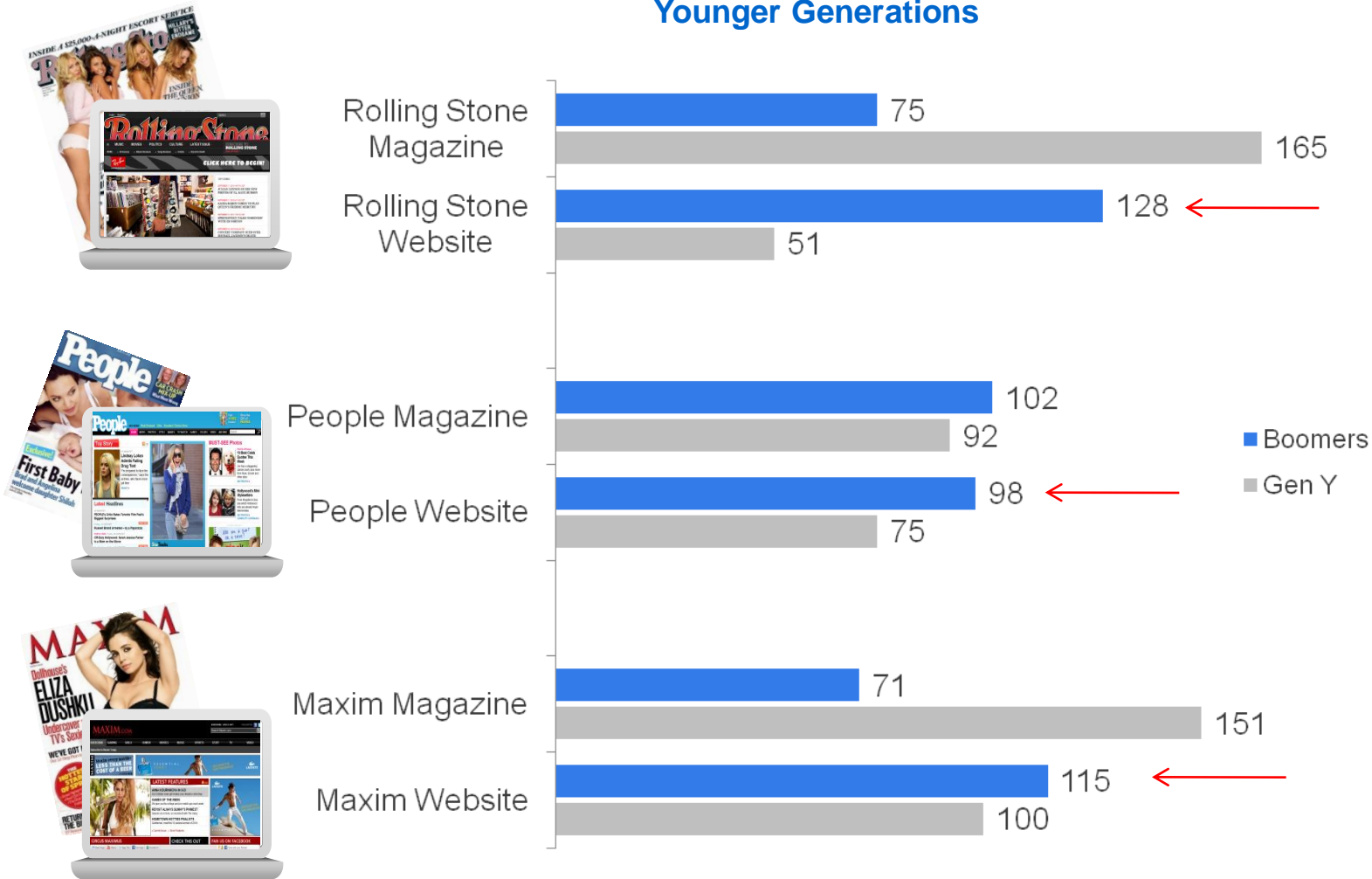
Boomers Straddle Between Traditional and New Age

Boomers Are Surprisingly Overindexing on the Magazine Online Sites



Familiar Brand Names Resonate With Boomers


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



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

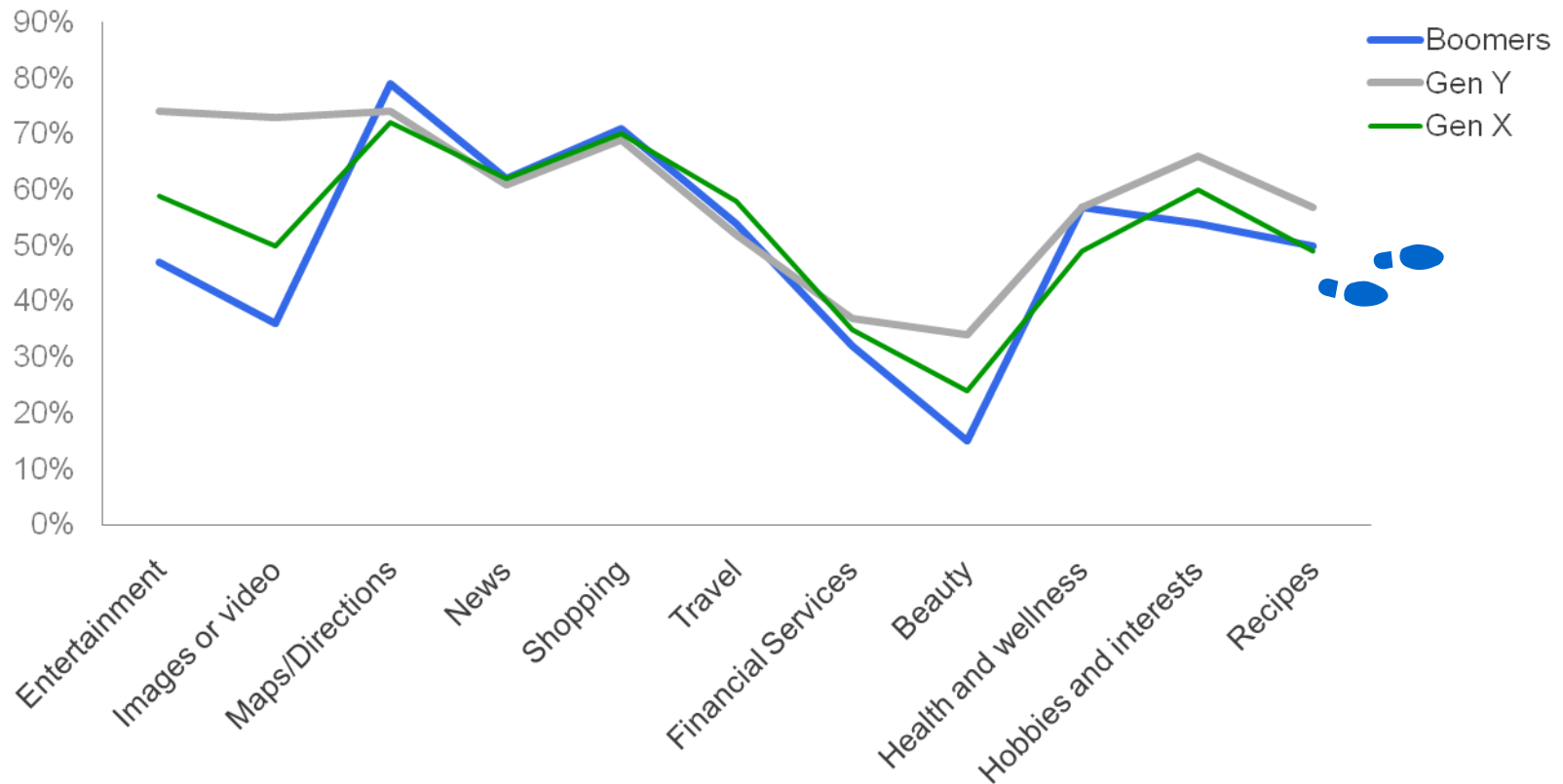
The Internet Harnesses Family Time

"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

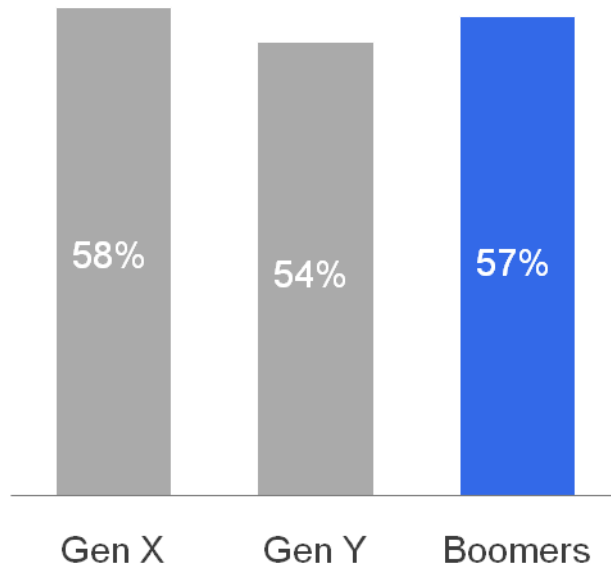
Type of information searched for on search engine



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



Sponsored Links Speak to Boomers

69%

Boomers click on
sponsored links

58%

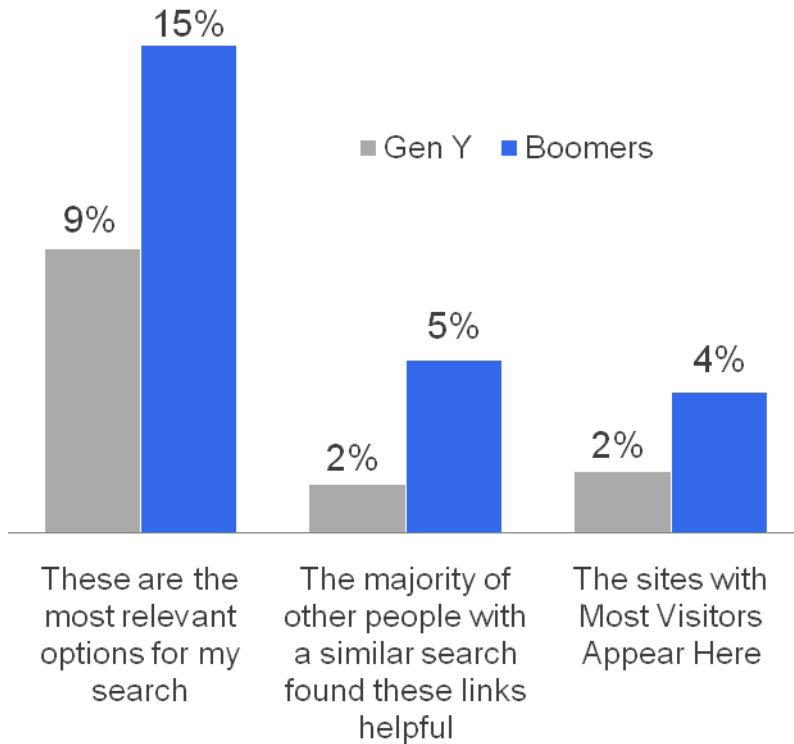
Gen Y click on
sponsored links



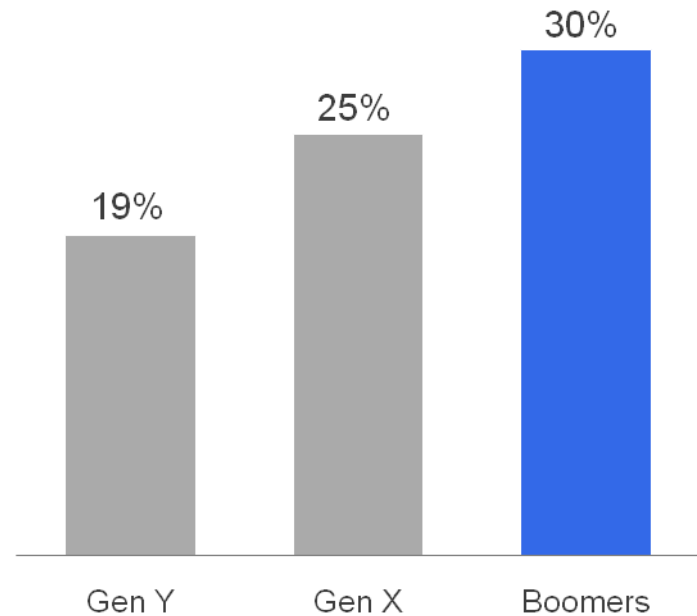
Source: Google/Nielsen Boomer Survey August 2010:
Q21: "Have you ever clicked on links that typically appear in the sections highlighted in red?" Respondents who answered 'Yes'.
Gen Y N=265, Boomers N=2175

Boomers Find Sponsored Links Relevant and Useful

Perceived Purpose of Sponsored Links
% Audience



% Finding Sponsored Links Useful



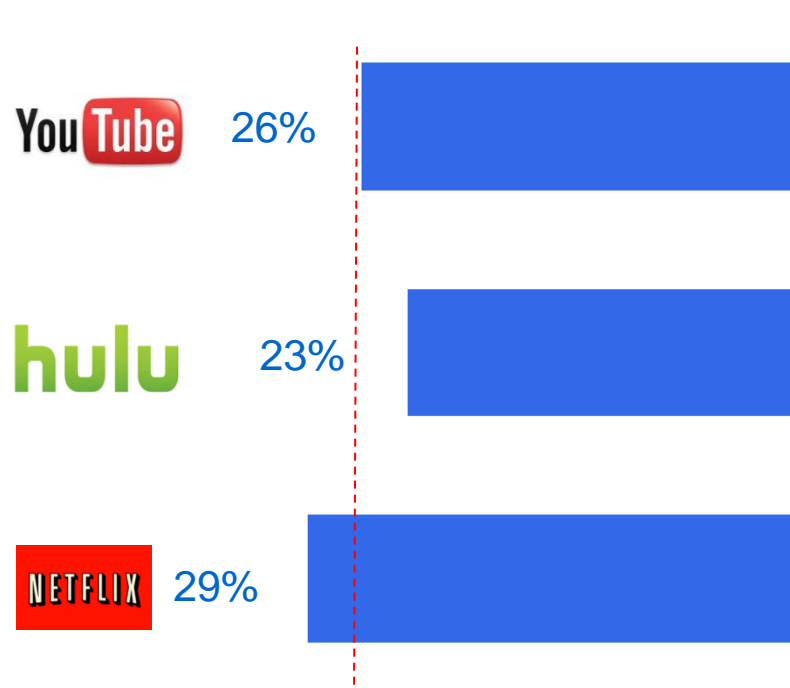
Source: Google/Nielsen Boomer Survey August 2010:
Q19: What one reason best explains why these listings appear prominently at the top of the page or to the right of the other listings?
Q20: Thinking about a typical internet search results page like this one, how useful do you typically find results in 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

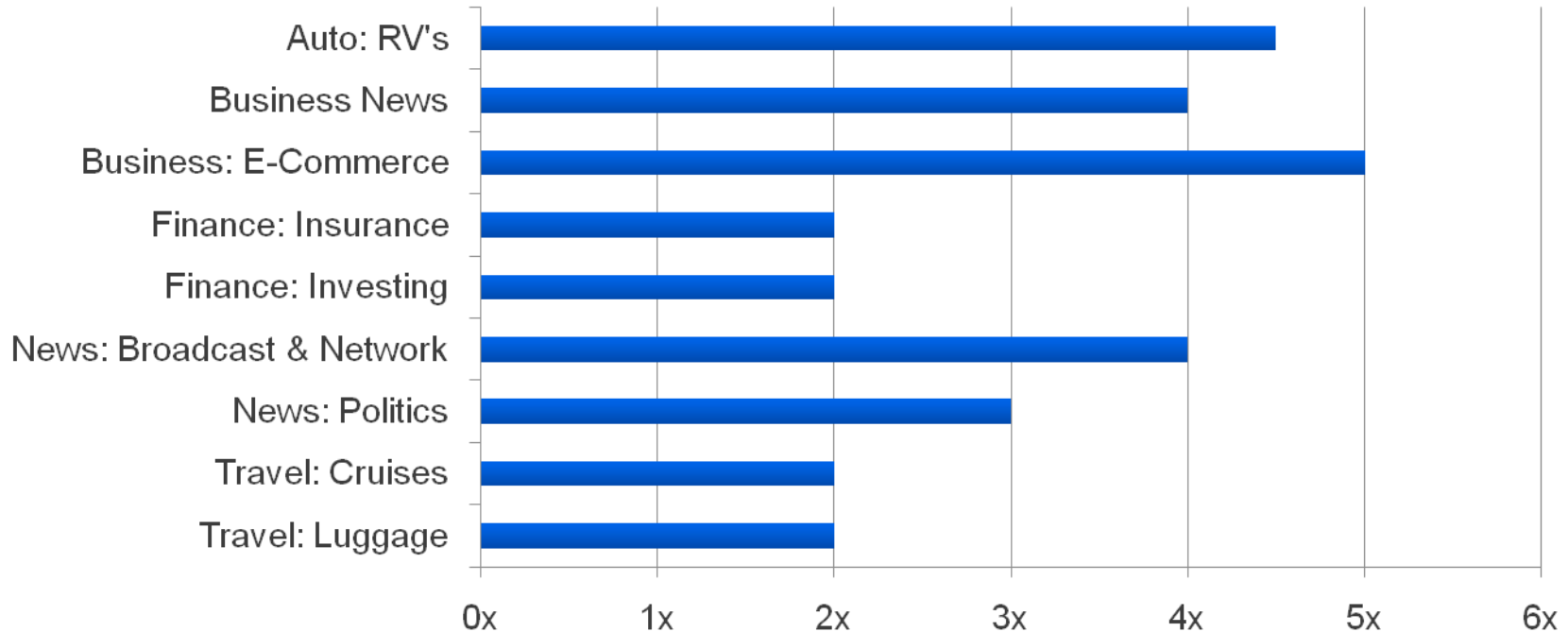
% Unique Audience Composition



Boomers **26%** of
Population

Boomers' Video Interests on YouTube

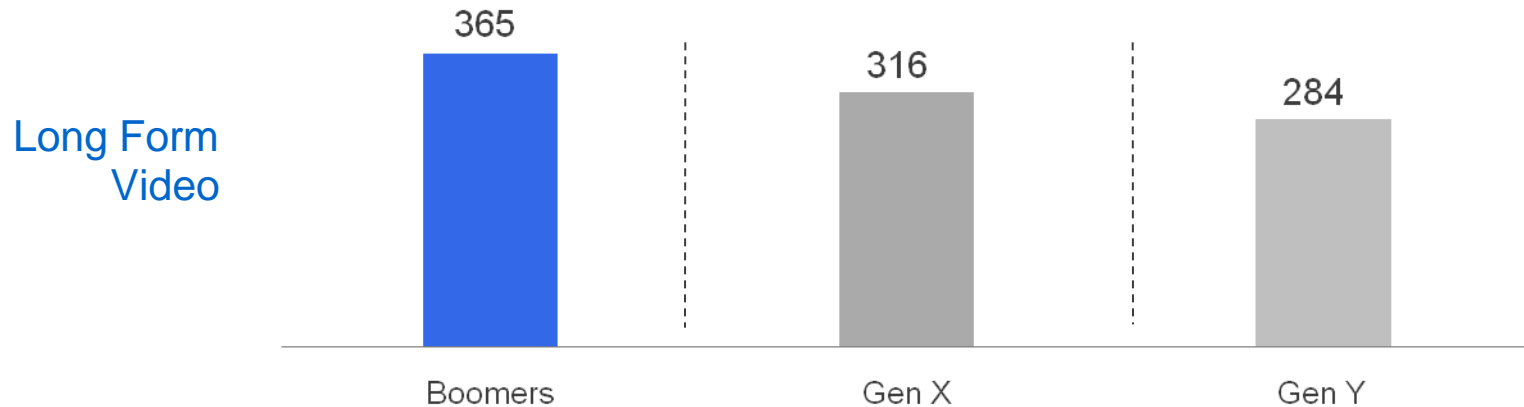
Males and Females ages 45-64 YouTube Viewing Index



Source: YouTube Video Targeting Tool Oct 2010

Boomers Prefer to Stay Engaged Longer

Average Minutes Per Month
Watching Long Form Video



Average Minutes Per Month
Watching Short Form Video

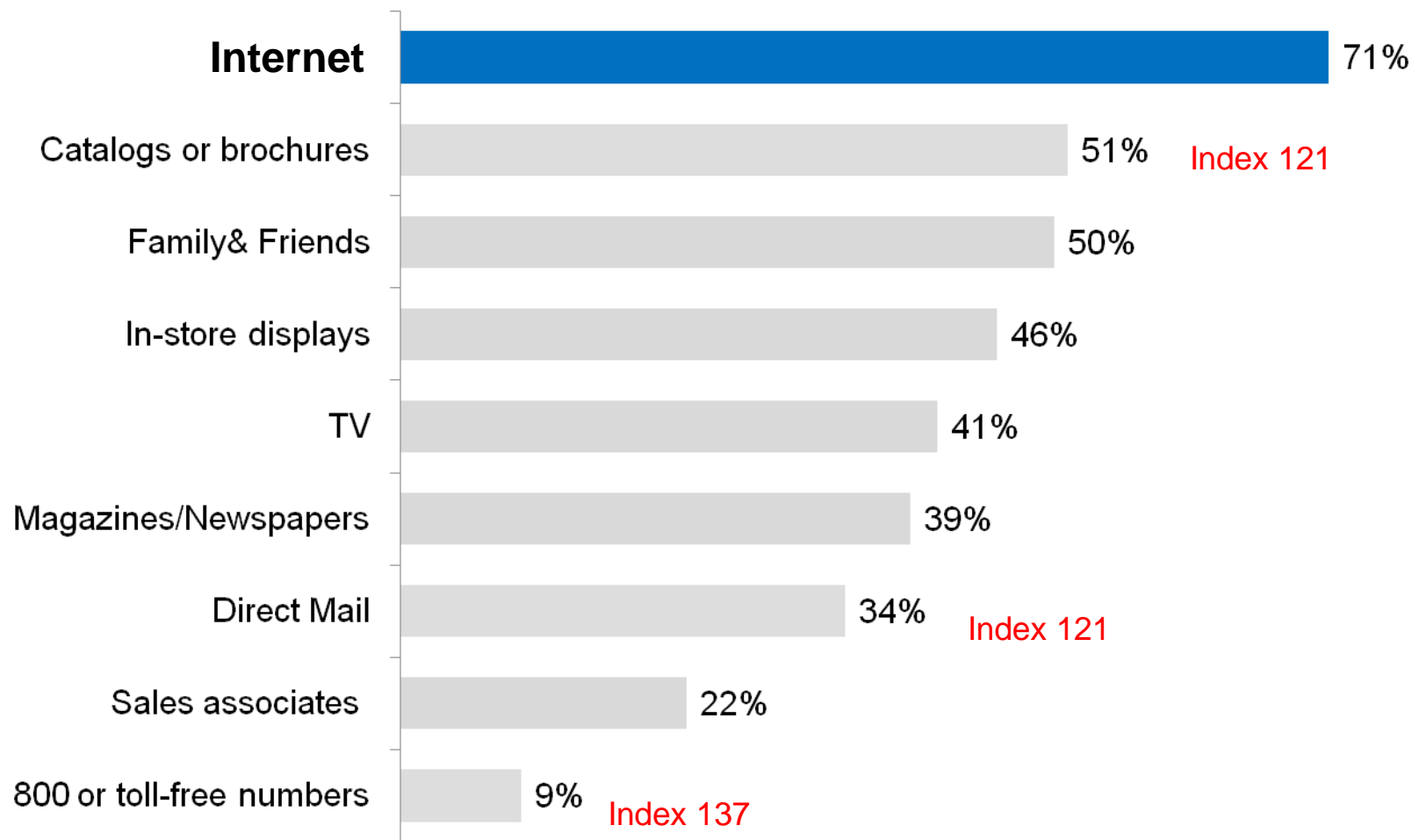


The Truth About How Boomers Buy



Traditional Tactics Still Work on Boomers...

Sources Used to Make Purchase Decisions



...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**

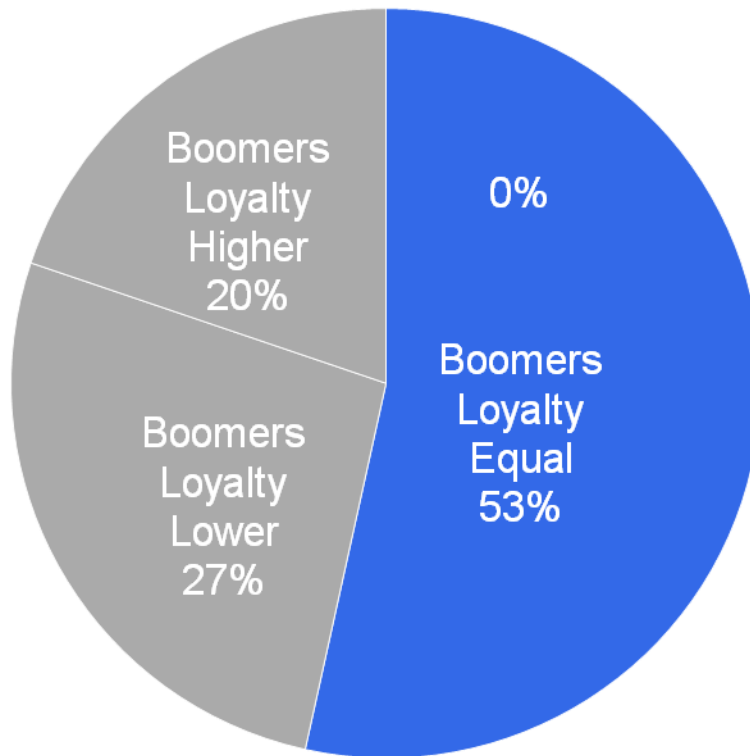


Source: Google/Nielsen Boomer Survey August 2010:

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

Boomer Brand Loyalty



80%

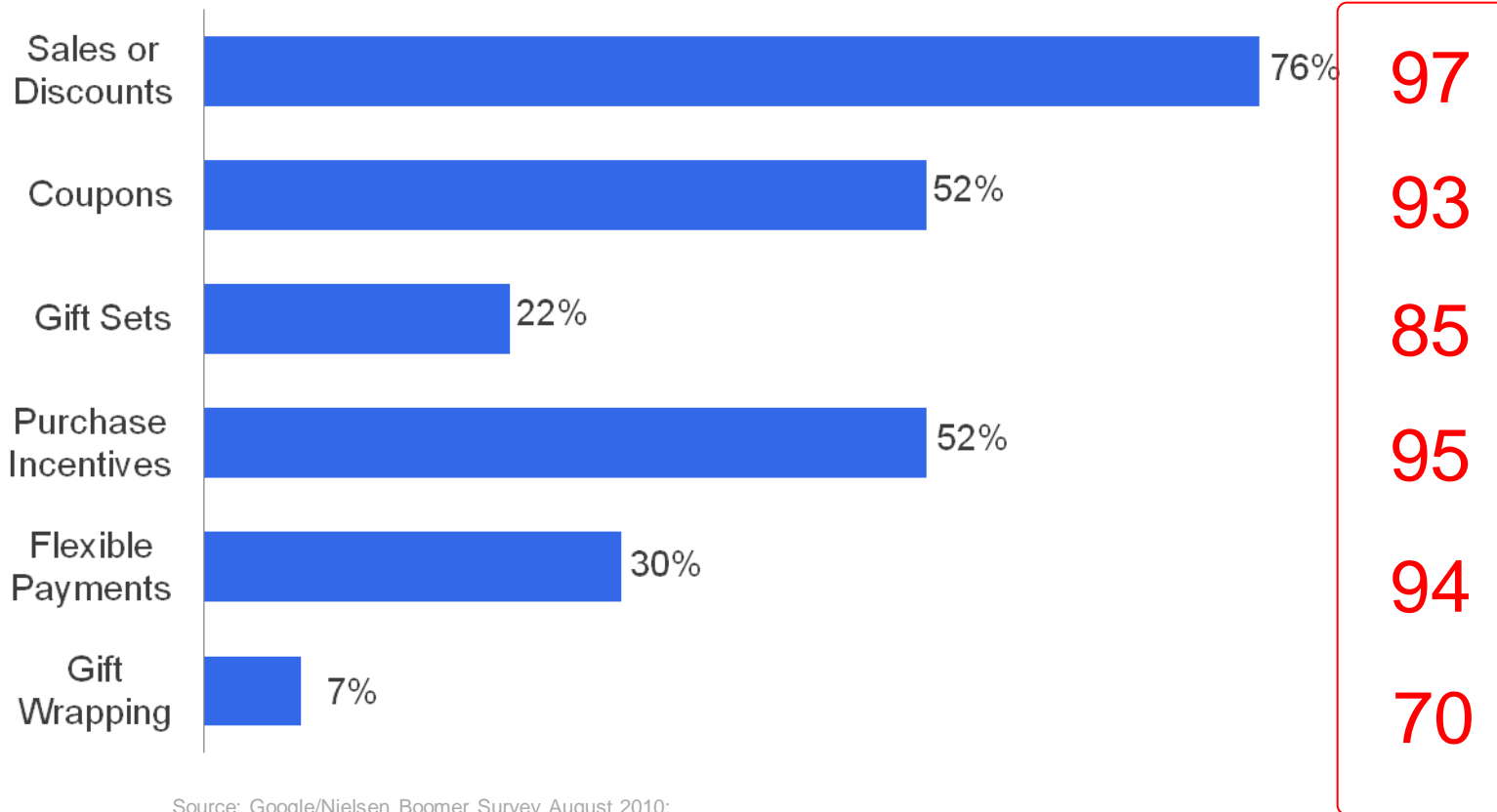
Of Boomers are **equal or less loyal** than other age groups

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

Promotional Tactics Online

Index vs. P18+



Source: Google/Nielsen Boomer Survey August 2010:
Q39B: Regardless of whether you have ever made an online purchase, please indicate how motivating each of the following would be in impacting you to purchase something online?
Average Adults 18+ N= 3878 ,Boomers N=2204

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



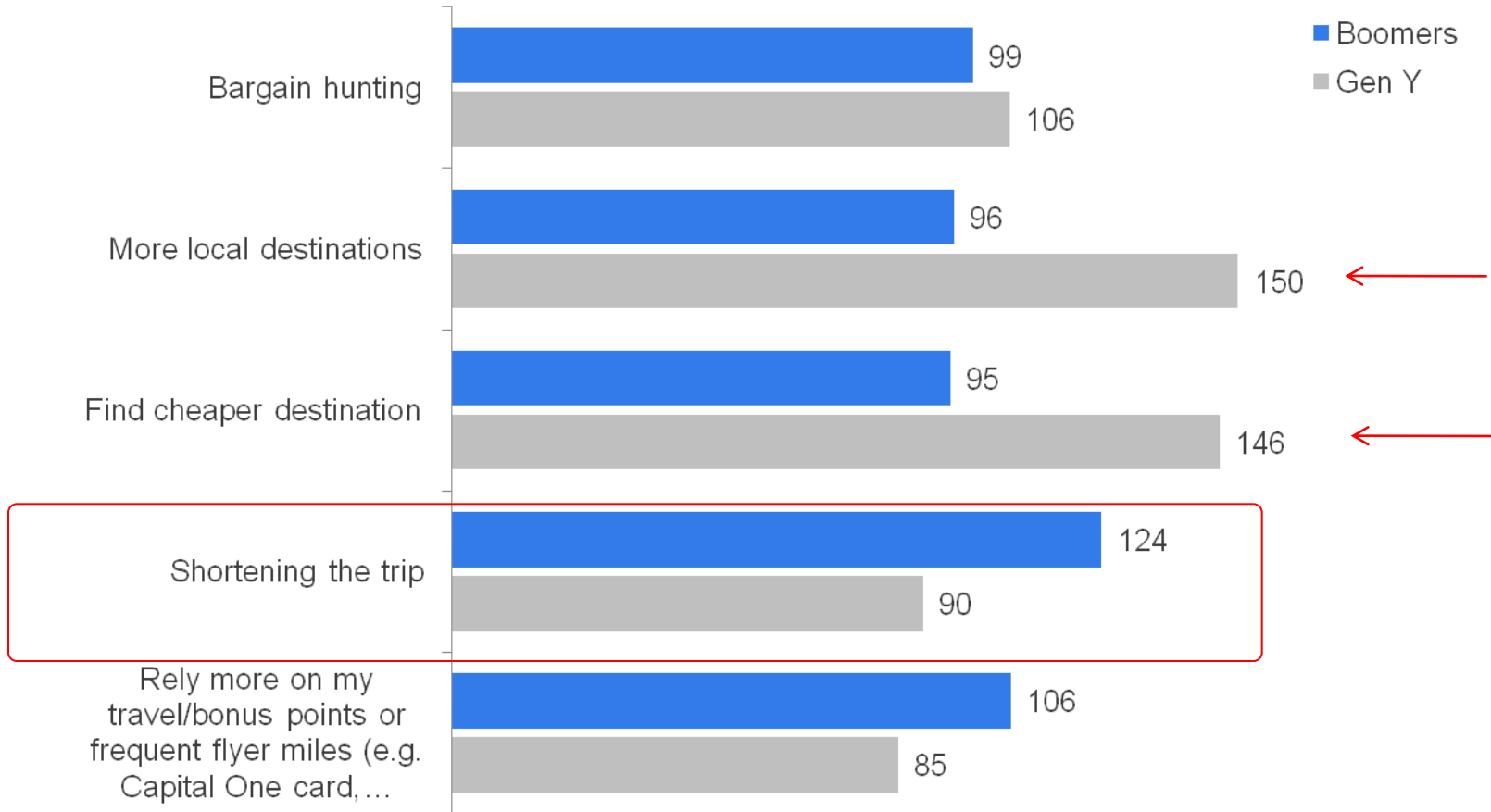
Source: Google/Nielsen Boomer Survey August 2010:

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

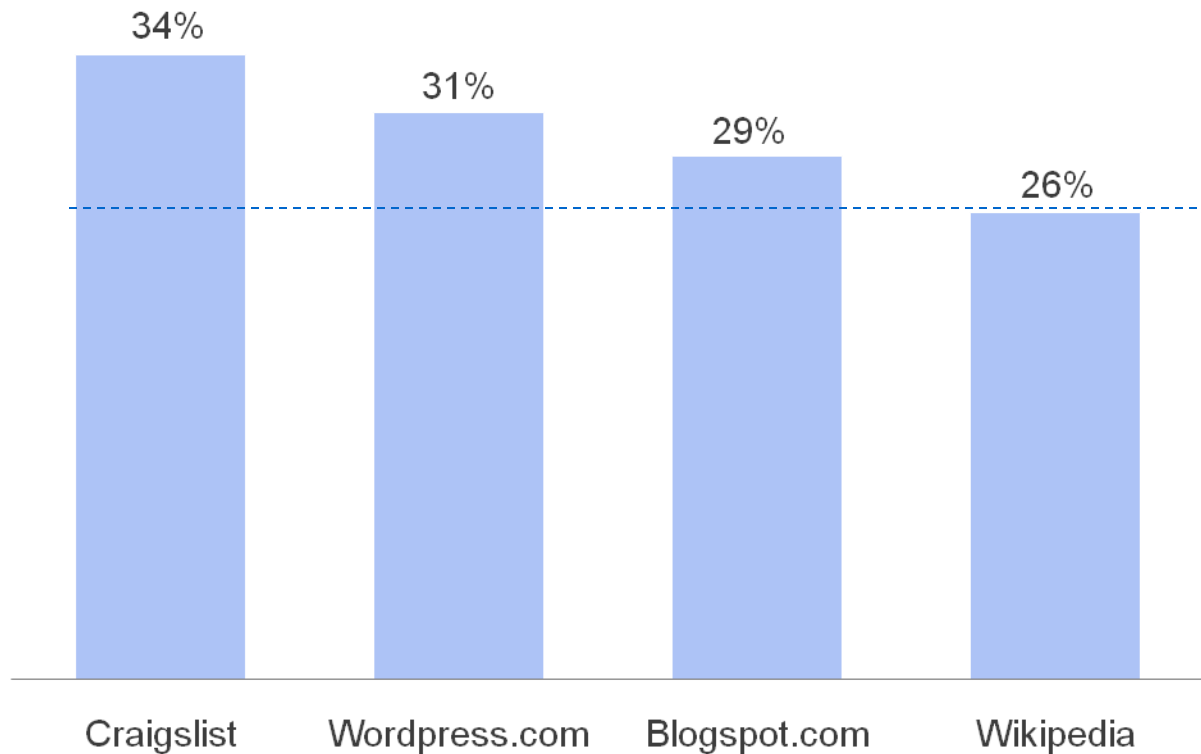
Boomers Are Changing Online Commerce

Unique Audience Composition percent for each website listed



Boomers Value High Utility

Percent share of online minutes for each website listed

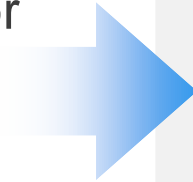


Boomers
26% of
Population

The Four Truths about Boomers

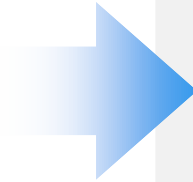
Marketing Underpinnings

1 Boomers are sponges for content and media.



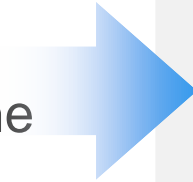
Boomers are an easy target for advertisers. Saturate them with relevant content.

2 Boomers sit on an aided adoption curve with technology.



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

3 Boomers are most comfortable straddling the familiar and the new.



Marketers can experiment but within the comfort zone.

4 Boomers are a curious and thoughtful demographic that value quality and family time.



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

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