Reaching Today’s Boomers & Seniors Online
Objective

To gain a better understanding of the Boomers and Seniors audiences overall, particularly in terms of their behaviors related to decision making and how they search for information via both offline and online channels.

Methodology

15 minute Attitude & Usage survey to examine attitudes and behaviors among a total of 6,100 U.S. respondents; recruited from March 6th to March 18th, 2013

- N=5,100 Boomers/Seniors ages 45+
- A general population control cell of 1,000 respondents ages 18–64 year olds was also included for comparison purposes
Key Findings

1. The Internet is an everyday part of boomers’ and seniors’ lives; it is the top source for gathering information on topics of interest, outpacing TV and print media by a substantial margin. As an advertiser, it is critical to be present across many digital platforms in order to engage this audience. Online video, search, and social networks build upon each other.

2. Over half of boomers and seniors watch online video with YouTube reported as the preferred site with 82% of video watchers using it. Online video advertising has huge potential in captivating this group as seen by trending videos as well as actions taken as a result of watching online video.

3. Social networking sites are used by the majority of boomers/seniors daily with more than half following a group or organization on a social platform. Facebook ranks #1 as the most used social network.
Key Findings

4. Search is the top online information-gathering resource for boomers and seniors, driving a variety of actions. Relevancy, familiarity, and trust are equally important in influencing which search results are clicked on.

5. Boomers/seniors access the Internet on their PCs and growing portions are doing so on smartphones and tablets. Almost 2 in 5 own a smartphone or tablet and more are likely to purchase one in the next 12 months. Further, multi-screen use is common with over 75% of mobile device owners reporting using more than one device at a time.

6. This audience is involved and/or interested in a variety of US societal causes and government-related issues surrounding senior advocacy. While television is a primary vehicle for generating awareness, online media platforms also drive strong awareness as well as action via website visitation, content sharing and online donations.
Internet is the #1 source of information
Boomers/Seniors spend more time online than watching TV in an average week.

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study
Q1 Approximately how much time do you spend on each of the following activities in an average week?

- Watching TV:
  - Boomers: 15.3 hours
  - Seniors: 16.3 hours

- Going online at home:
  - Boomers: 14.8 hours
  - Seniors: 13.9 hours

- Going online outside of the home:
  - Boomers: 4.8 hours
  - Seniors: 1.9 hours

- Listening to the radio:
  - Boomers: 4.7 hours
  - Seniors: 3.4 hours

- Reading a magazine/newspaper:
  - Boomers: 2.0 hours
  - Seniors: 3.1 hours

TV = 16hrs
Online (NET) = 19hrs
Immediacy and trust are key value drivers

- **Internet allows me to easily access information on my personal interests**: 78%
- **Internet keeps me up-to-date on political and policy issues**: 60%
- **Internet is my most trusted source for news & information**: 33%

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study; Base: Boomers/Seniors (Ages 45+) (n=5,100)

B2: Below is one more list of statements. Again, there are no right or wrong answers. We are simply interested in your opinion. Please indicate how much you agree or disagree with each of the following statements.
The internet ranks as the most popular source to learn more about a topic of interest

Top 5 sources used

<table>
<thead>
<tr>
<th></th>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Internet</td>
<td>83%</td>
</tr>
<tr>
<td>#2</td>
<td>Friends and family</td>
<td>77%</td>
</tr>
<tr>
<td>#3</td>
<td>Television</td>
<td>65%</td>
</tr>
<tr>
<td>#4</td>
<td>Magazines/newspapers</td>
<td>52%</td>
</tr>
<tr>
<td>#5</td>
<td>Brochures/catalogues</td>
<td>36%</td>
</tr>
</tbody>
</table>
Boomers/Seniors access a variety of information online, news & weather most popular

Types of information accessed online in past month

- **66%** News & Weather
  - Foxnews.com
  - Bloomberg.com
  - Weather.com

- **57%** Shopping
  - Overstock.com
  - Merchantcircle.com

- **45%** Coupon/discounts/daily deals
  - LivingSocial.com
  - Shopathome.com
  - Sale-hot.com

- **44%** Food Information
  - Food.com
  - Foodnetwork.com
  - Cooks.com

- **43%** Games & related activities
  - Pogo.com
  - GSN.com

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study, n=5,100
Q5: Which of the following type(s) of information have you accessed online in the past month? Select all that apply
Hitwise; top website visitation; 4 weeks ending 4/13/2013, Age 55+
Online video provides entertainment & utility
54% of boomers/seniors watch online video vs. 65% of general population

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study
Q3: Here is one more list of online activities. Which of these activities do you ever do online? Select all that apply
Entertainment and utility are top motivations for viewing online videos

<table>
<thead>
<tr>
<th>Entertainment</th>
<th>Utility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Be entertained</td>
<td>Stay up to date with latest news</td>
</tr>
<tr>
<td>Watch funny videos</td>
<td>See demonstrations on a topic</td>
</tr>
<tr>
<td>Relax &amp; unwind</td>
<td></td>
</tr>
<tr>
<td>Watch TV shows, movies or commercials</td>
<td></td>
</tr>
</tbody>
</table>

63% Be entertained
51% Watch funny videos
44% Relax & unwind
35% Watch TV shows, movies or commercials
40% Stay up to date with latest news
34% See demonstrations on a topic

15% of Boomers/Seniors spend **more time** watching online videos than TV (vs. 32% of General population)

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study Base: Online Video Users (n=3,021)
Q15: In general, thinking about the time you spend watching online videos (including all online content such as videos, shows, movies, etc.), which of the following is true for you? -- answers include “I watch more, same, less time than regular television”
Q16: Why do you watch online videos (including all online content such as videos, shows, movies, etc.)? Is it to... Select all that apply
YouTube is the preferred video website

Online video websites used among video viewers ages 45+

- YouTube: 82%
- Facebook: 43%
- Netflix: 23%
- Hulu: 23%
- Yahoo! Video: 19%
- Amazon.com: 15%
- MSN: 15%
- AOL: 9%
- MySpace: 4%
- Vimeo: 4%
- Vevo: 3%

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study
Q13: Which of the following online video websites (e.g., YouTube, Yahoo! Video, Hulu) do you use to watch online videos (including all online content such as videos, shows, movies)
Trending YouTube videos for Boomers

1. How Animals Eat Their Food
   - Source: YouTube Trends Dashboard, most viewed/shared videos in US w/o 4/15 across the following age groups: 45-54, 55-64, 65+
   - Views: 32,772,148

2. K-Mart Commercial: Ship My Pants
   - Views: 7,397,264

3. Banking Committee Hearing – Illegal Foreclosures
   - Views: 262,757

4. John Stewart Describes Monsanto Protection Act
   - Views: 117,822

Source: YouTube Trends Dashboard, most viewed/shared videos in US w/o 4/15 across the following age groups: 45-54, 55-64, 65+
Top Trending YouTube video for Seniors

baby&me / the new evian film

EvianBabies - 84 videos

22,605,673 views

77,003 likes
2,922 dislikes
44.6% of views in the US last month from people 45+
Online video viewing prompts action among boomers/seniors

3 in 4 online video watchers have taken action as a result of online video

- Searched online for more information: 47%
- Clicked on a link I was interested in: 39%
- Forwarded a link or video to someone: 38%
- Looked for related online videos: 32%
- Posted a comment on the video: 25%
- Rated a video: 19%

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study Base: Online Video Users
Q17: Have you ever taken any of the following actions as a result of viewing videos (including all online content such as videos, shows, movies, etc.) on online video websites (such as YouTube, Yahoo! Video, Hulu)?
Americans 50+ are plugged in to social networking
Social networking sites used daily by most boomers and seniors

Daily use of a social networking site

71% Boomers (n=1,832)

59% Seniors (n=294)

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study
Q4: How often do you go online using an Internet-enabled device to do the following every day?
Facebook ranks as #1 social networking site, membership on par with general population

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study, Base: Social Networking Users Q11: Which of the following social networking sites (like Facebook, Google+, MySpace, etc) do you use or are you currently a member of?
Boomers/Seniors are active on social networking sites

Activities done on a social network

- Follow a group or organization: 55%
- Post and watch videos: 40%
- Support a cause: 26%
- Join a group they're interested in: 23%

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study, Base: Social Networking Users; Q12: Which of the following do you typically do while on social networking sites (like Facebook, Google+, MySpace, etc)?
Search drives online & offline action
82% of boomers/seniors use a search engine to gather information on a topic of interest

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study, Base: Internet Users
Q8: Now we'd like to get a sense of how you gather information online. Please select all the online sources you use to gather information on topics that interest you or that you want to learn more about.
relevancy
familiarity
trust
This happens **3,621** times a minute by Boomers/Seniors
After gathering information, they take action

3 in 10 actions taken by boomers/seniors after a search involve online video

<table>
<thead>
<tr>
<th>Action</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talked to others about what I learned</td>
<td>48%</td>
</tr>
<tr>
<td>Shared search results with others</td>
<td>39%</td>
</tr>
<tr>
<td>Thought more favorably about something I learned</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Visited an online video website</strong></td>
<td><strong>36%</strong></td>
</tr>
<tr>
<td>Called or contacted an organization</td>
<td>36%</td>
</tr>
<tr>
<td>Visited a social networking site</td>
<td>34%</td>
</tr>
<tr>
<td><strong>Forwarded a video or link to others</strong></td>
<td><strong>31%</strong></td>
</tr>
<tr>
<td>Changed my mind about a topic</td>
<td>31%</td>
</tr>
<tr>
<td>Looked for more information offline</td>
<td>31%</td>
</tr>
<tr>
<td><strong>Posted my own video or link</strong></td>
<td><strong>22%</strong></td>
</tr>
</tbody>
</table>
Mobile and cross-device use are growing
Mobile usage is still developing among boomers and seniors

Use a smartphone regularly

vs. 48% of general pop

Use a tablet regularly

vs. 25% of general pop
Time spent on mobile devices and intent to purchase a device are both expected to grow among Americans 50+

<table>
<thead>
<tr>
<th>Average time spent per week</th>
<th>% plan to spend more time over next year</th>
<th>% plan to purchase in next 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.0 hrs</td>
<td>+42%</td>
<td>+35%</td>
</tr>
<tr>
<td>6.4 hrs</td>
<td>+51%</td>
<td>+34%</td>
</tr>
</tbody>
</table>

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study, Q18A How likely are you to purchase the following types of mobile devices in the next 12 months? Base: Smartphone And Tablet Users Q19: Approximately how much time do you spend going online via your device in an average week? Q20: Compared to last year, please indicate whether you spend more, less or the same amount of time going online on your. .?
Those who use mobile devices are engaged in a variety of activities

**Boomer/senior smartphone users v. tablet users**

- Looked for more information: 58% (Smartphone) vs. 60% (Tablet)
- Made a purchase: 40% (Smartphone) vs. 49% (Tablet)
- Visited a website of interest: 35% (Smartphone) vs. 44% (Tablet)
- Contacted a business/organization: 28% (Smartphone) vs. 16% (Tablet)
- Talked to others about something I learned: 26% (Smartphone) vs. 26% (Tablet)
- Looked for more info offline: 17% (Smartphone) vs. 22% (Tablet)
- Changed my mind about a topic: 14% (Smartphone) vs. 17% (Tablet)
- Did not take any action: 26% (Smartphone) vs. 22% (Tablet)

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study. *Base: Smartphone users Q21A Which of the following actions, if any, did you take as a result of gathering information via your device on topics that interest you or that you want to learn more about? Please select all that apply.*

*Base: Tablet users Q21A Which of the following actions, if any, did you take as a result of gathering information via your device on topics that interest you or that you want to learn more about? Please select all that apply.*
...and use their devices simultaneously and sequentially with other screens

Simultaneous
- 77%

Sequential
- 64%

PC: 52%
TV: 30%
Smartphone: 18%

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study. Base: Smartphone And Tablet Users. Q22: Do you ever use more than one device at the same time (i.e. watching TV while using your PC or laptop)? Base: Use more than one device at the same time. Q23: Do you ever look for information on one device and continue on another? N=1,950
Involvement in causes & issues around senior advocacy is important
The vast majority of boomers & seniors want to stay active & vibrant; govt programs important

**Boomers/Seniors (n=5100)**

- **Want to stay mentally active**: 86%
- **Want to stay physically active**: 79%
- **Want to learn new things**: 74%
- **Believe in the importance of government programs**: 74%
- **Want to feel productive, useful, helpful**: 73%
- **Want to interact with people**: 60%

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study; B1: Now we would like to ask you your opinion on a variety of topics. Again, there are no right or wrong answers. We are simply interested in your opinion. Please indicate how much you agree or disagree with each of the following statements.
Health and financial issues are also top of mind

**Boomers/Seniors (n=5100)**

- Am concerned about my health: 60%
- Want to keep earning money to retire more comfortably: 53%
- Look forward to retiring/doing what I want: 50%
- Need health insurance: 49%
- Keep working b/c income from other sources isn't enough: 38%
- Feel confident and proactive financially: 34%
- Often donate my time/money to a cause: 33%
- Feel confident in my estate planning: 31%
- Have a job that keeps me fulfilled: 29%
- Have a job that is fun/enjoyable: 28%

**Source:** Ipsos MediaCT 2013 Boomers/Seniors Research Study; B1: Now we would like to ask you your opinion on a variety of topics. Again, there are no right or wrong answers. We are simply interested in your opinion. Please indicate how much you agree or disagree with each of the following statements.
Most boomers and seniors are involved and/or interested in a cause or movement

62% of boomers and seniors currently participate in a cause or movement

| Top 10 US societal causes & issues: Interest in future involvement |
|-------------------|-------------------|
| **Healthcare**    | **71%**           |
| Social Security   | 71%               |
| Medicare          | 65%               |
| Retirement        | 60%               |
| Senior Issues     | 60%               |
| Medical Research/Disease Prevention & Awareness | 58% |
| Affordable Home Energy | 57% |
| Disability Rights | 48%               |
| Joblessness       | 46%               |
| Medicaid          | 46%               |

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study; P1: Are you currently involved in any of the following type(s) of causes or movements? Base: 5,100; P3: How interested are you in getting involved in each of the following type(s) of US societal causes or government related issues in the future? Select one for each.
Awareness about causes and issues comes from a variety of sources

Top 5 sources used among Boomers/Seniors

<table>
<thead>
<tr>
<th>#1</th>
<th>Television</th>
<th>69%</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2</td>
<td>Online</td>
<td>54%</td>
</tr>
<tr>
<td>#3</td>
<td>Newspaper</td>
<td>43%</td>
</tr>
<tr>
<td>#4</td>
<td>Friends/Family/Acquaintances</td>
<td>32%</td>
</tr>
<tr>
<td>#5</td>
<td>Radio</td>
<td>26%</td>
</tr>
</tbody>
</table>

Source: Ipsos MediaCT 2013 Boomers/Seniors Research Study Base: Total
P4: You mentioned you are interested in the following cause(s). What types of activities, if any, have you participated in for the cause(s) listed below? Base: Total
P5: How do you typically share or communicate information about US societal causes or government related issues with others?
Participation and communication to others about causes & issues happens online

Among Boomers/Seniors currently involved in cause

62%
read articles and visit cause-related websites to stay updated

2 in 5
share or communicate information about a cause to others online

20%
follow, like or +1 a cause-related group or organization online

Source: Ipsos MediaCT 2013 Boomers/Seniors Research, Base: Total
P5: How do you typically share or communicate information about US societal causes or government related issues with others?
Internet is the #1 source of information

Online video provides entertainment & utility

Americans 45+ are plugged into social networking

Search drives online & offline action

Mobile and cross-device use are growing

Involvement in causes & issues around senior advocacy is important