



CABLE NATION: The Age Of Adults 50+ - *A Powerful, Desirable Consumer*

Adults 50+ Are An Undervalued Segment Among Most Marketers

- Society is changing as rapid technological advancements and accessibility have empowered consumers of all ages
- This *increased connectivity* has now led many Adults 50-64 to share some similar economic and behavioral traits with the younger, most popular buying demos
- Evolving behaviors, coupled with the aging of the country, has enabled the *rise in power & influence* of Adults 50+, specifically among the Alpha Boomers (55-64)
 - An American turns **50 years old every 7 seconds** and this segment will **represent 35%** of the U.S. population by 2015
 - Adults 55-64 **outspend the average consumer in nearly every category** including restaurants, household furnishings, entertainment and personal care
 - The 50+ **workforce has increased 37%** in the last 10 years due to population growth and an older average retirement age (62 from 57)
 - Adults 50+ **own 65% of the aggregate** net worth of all U.S. households
 - Spending by the 116MM Adults 50+ in 2009 was **\$2.9 trillion, up 45%** in the last 10 years
 - Whether they're going out or entertaining at home, Adults 50+, especially 50-64, **remain every bit as active** as their younger counterparts

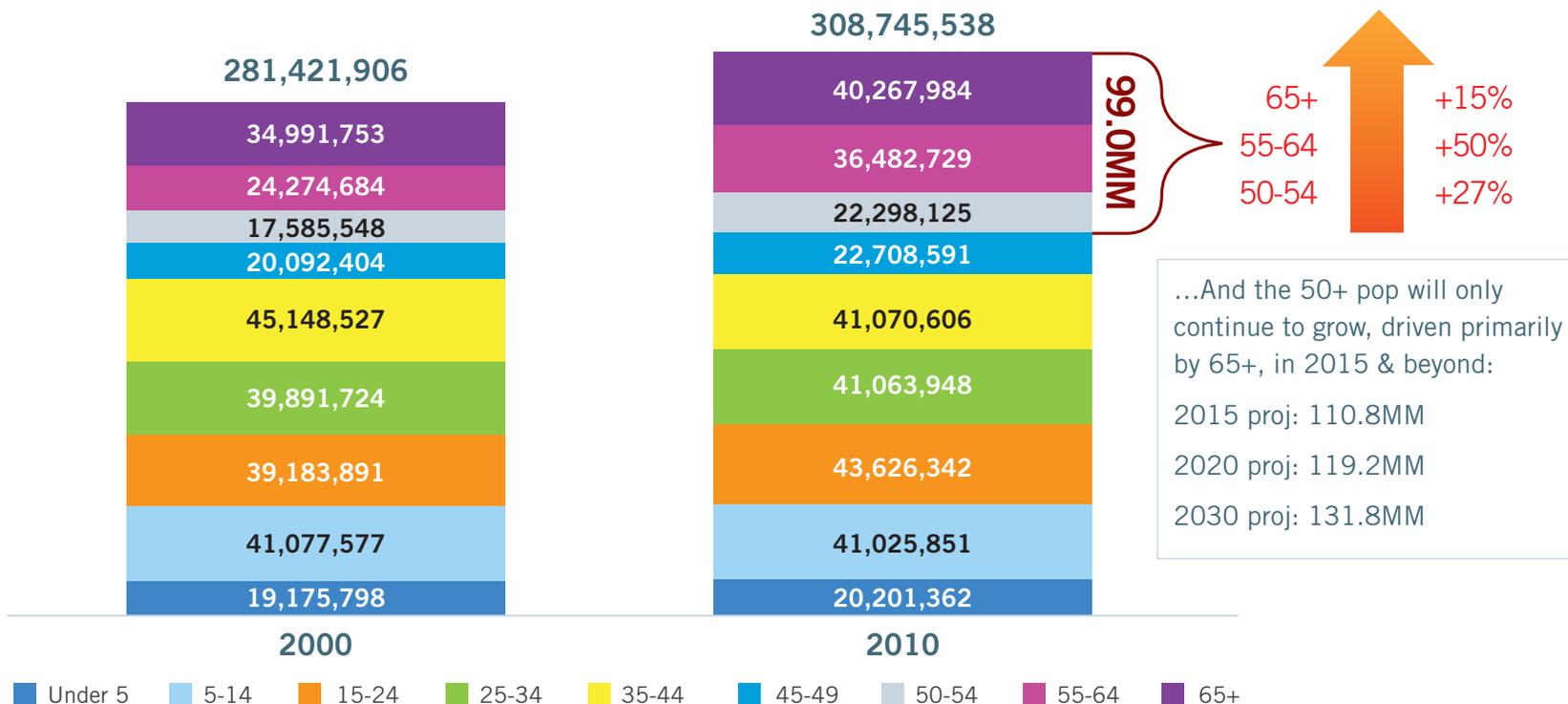
What does this all mean? Quite simply that the adult 50+ segment is **Too Big, Too Active** and **Too Powerful** to ignore

U.S Population Growth Is Due Almost Entirely To Increases Within The 50+ Demographic

50+ demo breaks, which made up 32% of the total population in 2010, are far outpacing any other demographic in terms of growth...

...Over the last 10 years, the A50+ population has increased by over 22MM while P15-49 has only increased 4MM

U.S. Population
2000 vs. 2010 Census

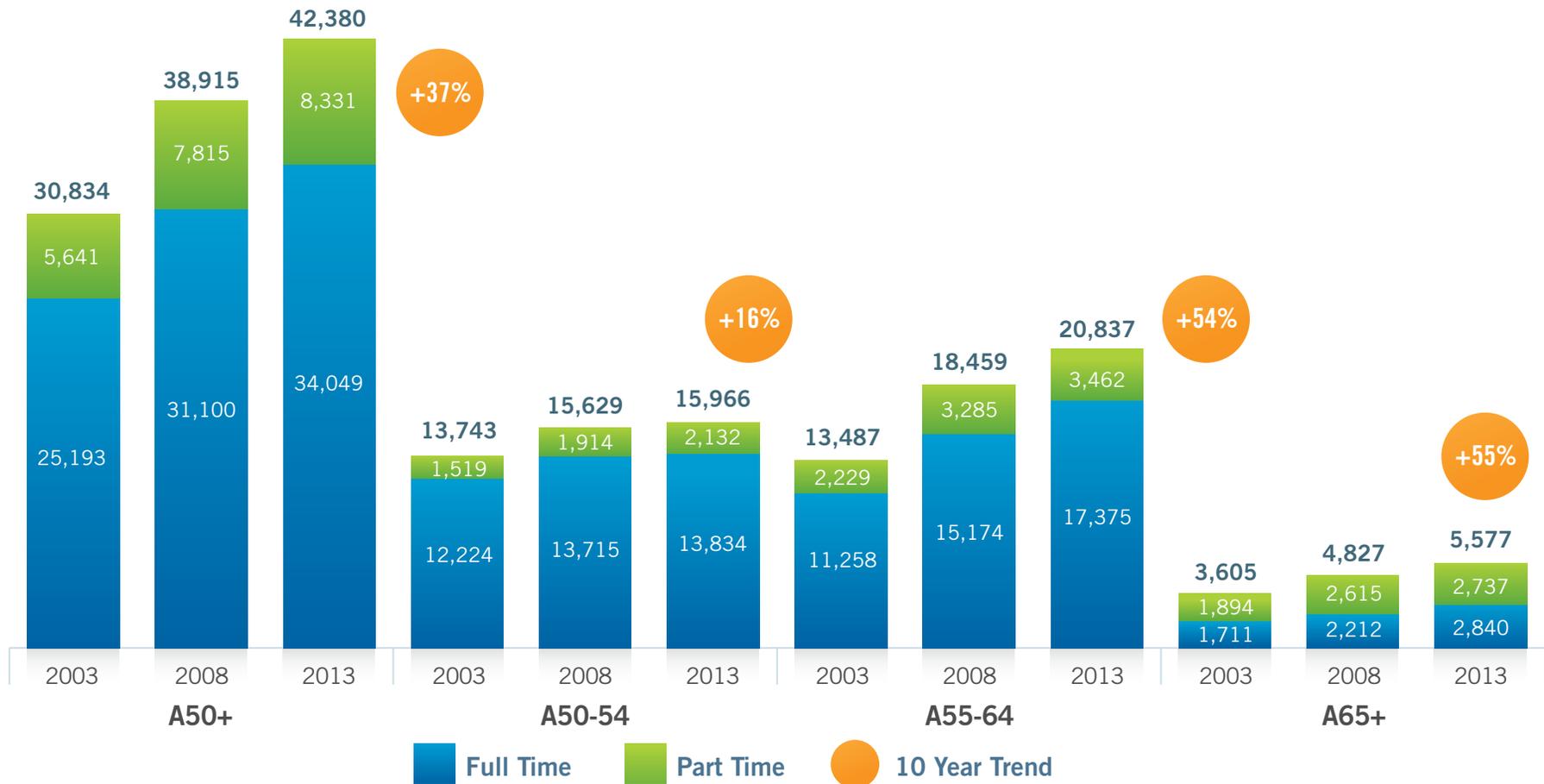


Source: US. Census

The Adult 50+ Work Force Has Grown Significantly Over The Last 10 Years

This growth is even more impressive when compared to Adults 18-49, who have seen a **4% decrease** in overall employment (**-10% full-time**) during the same time period

Employment Status: 10-Year Trend
(000)'s



Source: 2003, 2008, 2013 MRI Doublebase

Boomers Are Actively Wielding Their Enormous Purchasing Power Due To Their Higher Income And Employment Rate

Boomers make up almost 45% of all consumer spending with Adults 45+ over 60%; in fact Adults 45+ are responsible for the majority of spending in 67 out of 74 major consumer subcategories

Average Annual Expenditure	All Consumers	A45-54	A55-64	A65+
Total Average	\$51,442	\$62,103	\$55,636	\$40,410
Food (at home)	\$3,921	\$4,707	\$4,012	\$3,273
Food (away from home)	\$2,678	\$3,210	\$2,788	\$1,785
Housing / Shelter	\$9,891	\$11,244	\$9,728	\$7,605
Utilities	\$3,648	\$4,304	\$3,992	\$3,340
Housekeeping Supplies	\$610	\$668	\$736	\$597
Household Furnishings	\$1,580	\$1,780	\$1,763	\$1,215
Apparel & Services	\$1,736	\$2,041	\$1,622	\$1,022
Transportation	\$8,998	\$10,644	\$9,519	\$6,538
Healthcare	\$3,556	\$3,687	\$4,377	\$5,118
Entertainment	\$2,605	\$3,051	\$2,911	\$2,020
Personal Care	\$628	\$707	\$696	\$569
Education	\$1,207	\$2,426	\$1,118	\$236
Cash Contributions	\$1,913	\$2,430	\$2,353	\$2,454
Personal Insurance & Pensions	\$5,591	\$8,196	\$7,088	\$2,009
Alcoholic Beverages	\$451	\$454	\$493	\$315

Source: Consumer Expenditure Survey, U.S. Bureau of Labor Statistics, September, 2013. 50+ age break is not available

“ All consumers ” = an average of all reference persons within each consumer unit (family, household, cohabitation)

With Their Voracious Zest For Life, Adults 50+ Remain Very Active

Whether it's going out for a night on the town or entertaining at home, volunteering to help others or exercising to help themselves; Adults 50+, especially 50-64, remain every bit as active as their younger counterparts

	18-49	A25-54	A50+	A50-54	A55-64	A65+
I follow a regular exercise routine	52%	57%	62%	58%	61%	65%
Dining Out	45%	47%	47%	49%	49%	43%
Entertaining friends or relatives at home	36%	37%	35%	36%	37%	33%
Barbecuing	33%	35%	27%	35%	32%	18%
Baking	24%	24%	23%	25%	25%	19%
Cooking for fun	23%	24%	20%	24%	23%	16%
Attend music performances	24%	24%	19%	23%	20%	16%
Play online computer games	17%	14%	18%	18%	20%	15%
Volunteer for charity	14%	16%	17%	19%	18%	15%
Go to live theater	11%	12%	14%	13%	15%	14%
Go to museums	13%	14%	12%	13%	14%	11%
Home decoration & furnishing	9%	10%	9%	10%	10%	7%

Adults 50+ Are No Longer That Different From The Coveted Adult 18-49 Or 25-54 Demos When It Comes To Certain Buying Behaviors

Adults 50+ are just as likely to be open-minded in their purchasing decisions as Adults 18-49...

	18-49	A25-54	A50+	A50-54	A55-64	A65+
I like to shop around before making a purchase	75%	76%	76%	75%	79%	75%
I wait until other people have tried things before I try myself	50%	48%	46%	47%	46%	45%
I prefer to buy things friends or neighbors would approve of	29%	26%	19%	21%	19%	19%

...and they're actually less likely to buy the brands they grew up with...

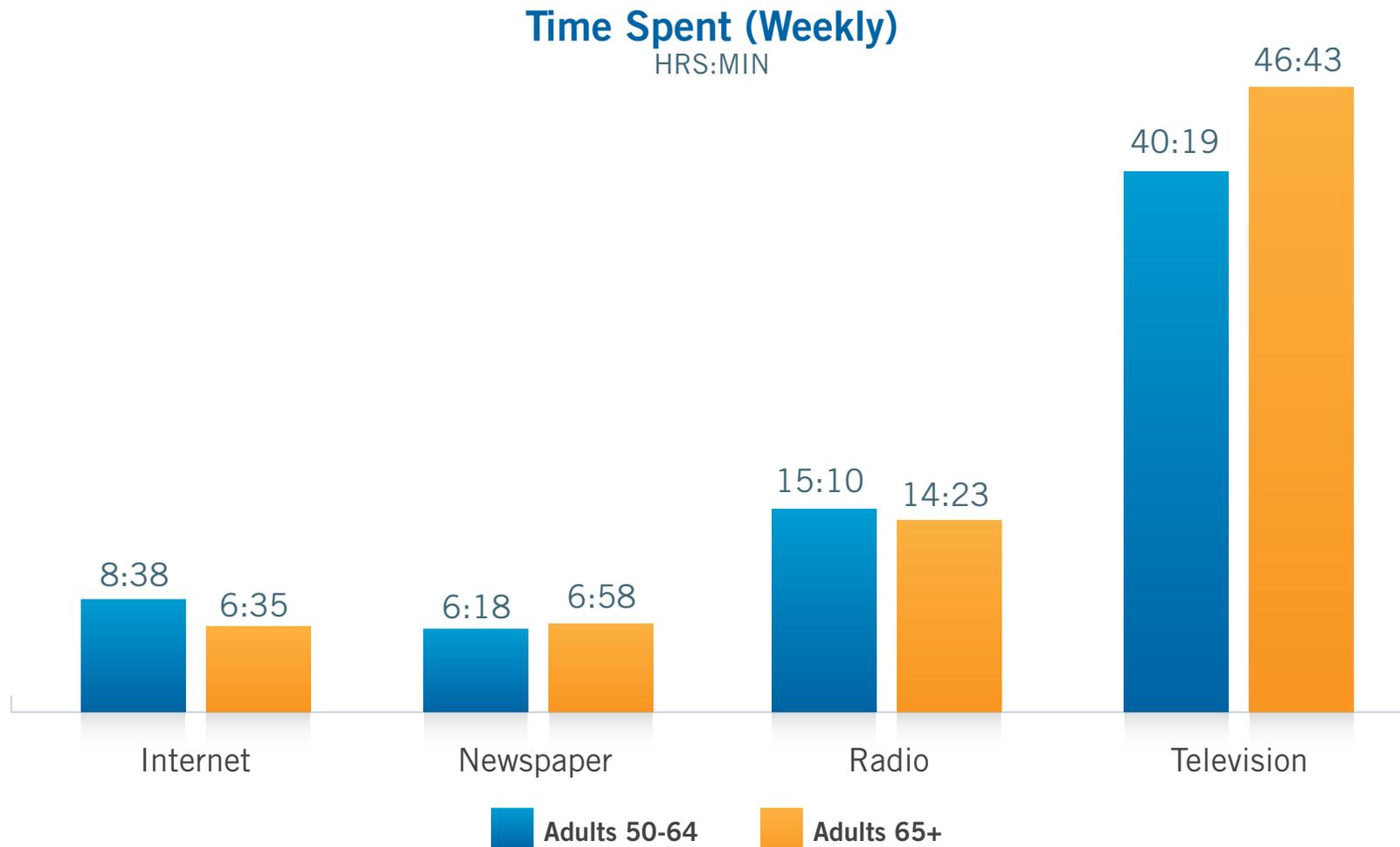
	18-49	A25-54	A50+	A50-54	A55-64	A65+
I buy the brands I grew up with, the ones my parents used	49%	47%	45%	47%	46%	44%

...but when they find brands they like that reflect their personal style, they become brand loyalists

	18-49	A25-54	A50+	A50-54	A55-64	A65+
I buy brands that reflect my style	64%	63%	59%	60%	61%	57%
When I find a brand I like, I stick to it	81%	83%	86%	85%	87%	86%
I will gladly switch brands to use a cents-off coupon	52%	51%	43%	46%	44%	42%

Source: 2013 MRI Doublebase. All statements are based on "any agree" except for the advertising statement which is based on "mostly agree"

On A Weekly Basis, Adults 50+ Spend More Time With Television Than All Other Major Media Combined



Internet: comscore Dec 2014. Radio: Radar reflects 55+, not 50-64

Source: RADAR © 118, September 2013 © Copyright Nielsen Audio (M-Su, M-F, Sa/Su 24-Hour TSL Estimates, All Radio)

Newspaper based on CAB Analysis of 2012 MRI Doublebase data fused with Media Audit (2012-2013)

Source: Nielsen Cross Platform Report 3Q13; P2+

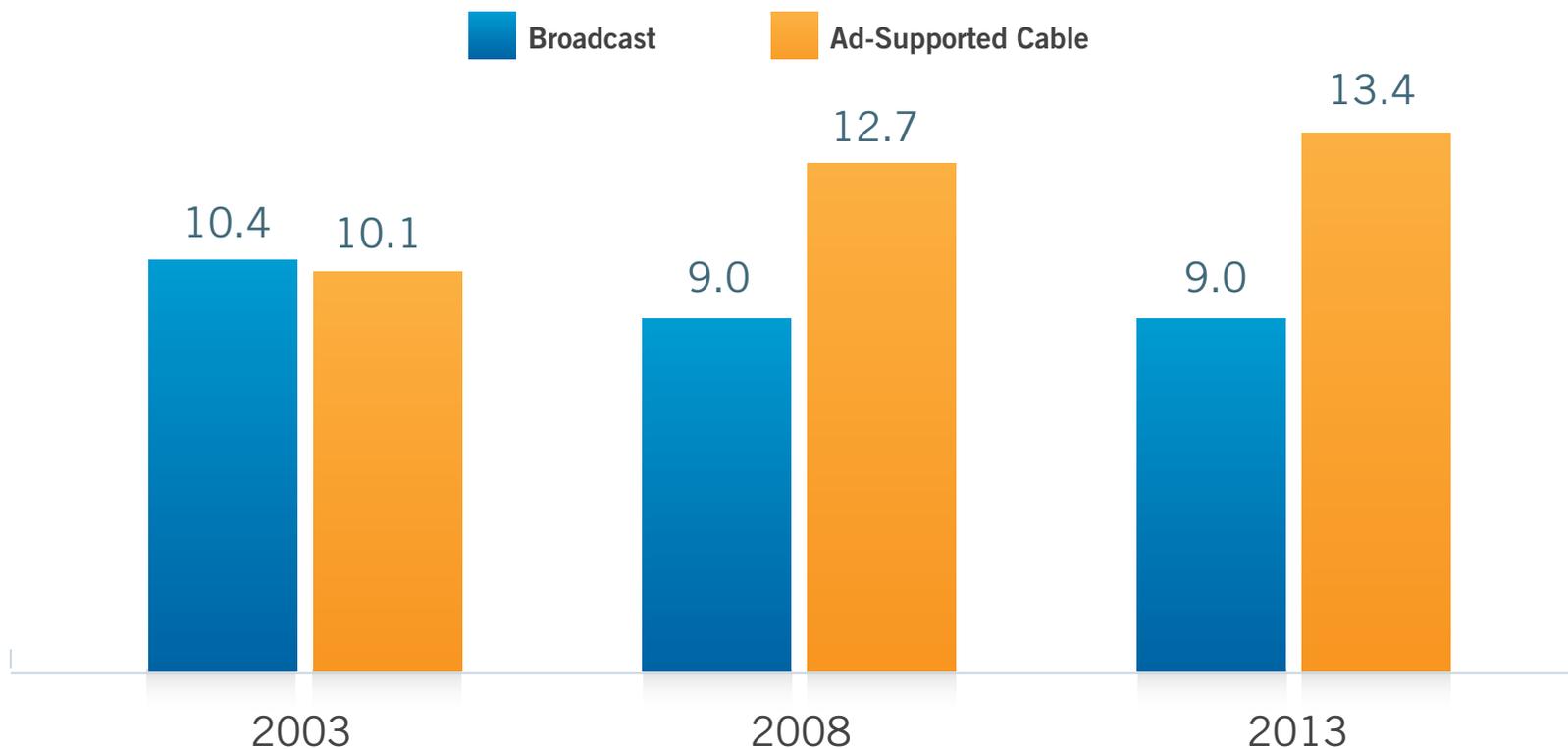
Adults 50+ Have Both An Emotional And Cognitive Involvement With Their Television Viewing Which Increases Engagement

A greater percentage of Adults 50+ turn to Television for entertainment, information and ideation than Adults 18-49 or 25-54

Television...	18-49	A25-54	A50+	A50-54	A55-64	A65+
<i>Emotional</i>						
Is pure entertainment	79%	82%	87%	85%	86%	89%
Is a good escape	67%	70%	78%	75%	77%	79%
Relaxes me	60%	62%	70%	68%	68%	72%
Puts me in a good mood	53%	54%	61%	57%	59%	65%
<i>Cognitive</i>						
Keeps me informed/up to date	61%	64%	74%	68%	73%	78%
Is a good source of learning	54%	56%	67%	62%	66%	72%
Gives me good ideas	48%	49%	54%	52%	52%	57%

Cable Now Dominates Broadcast Among Adults 50+ As Cable Ratings Continue To Grow Consistently While Broadcast Declines

Total Day Adults 50+ Rating
10-Year Trend

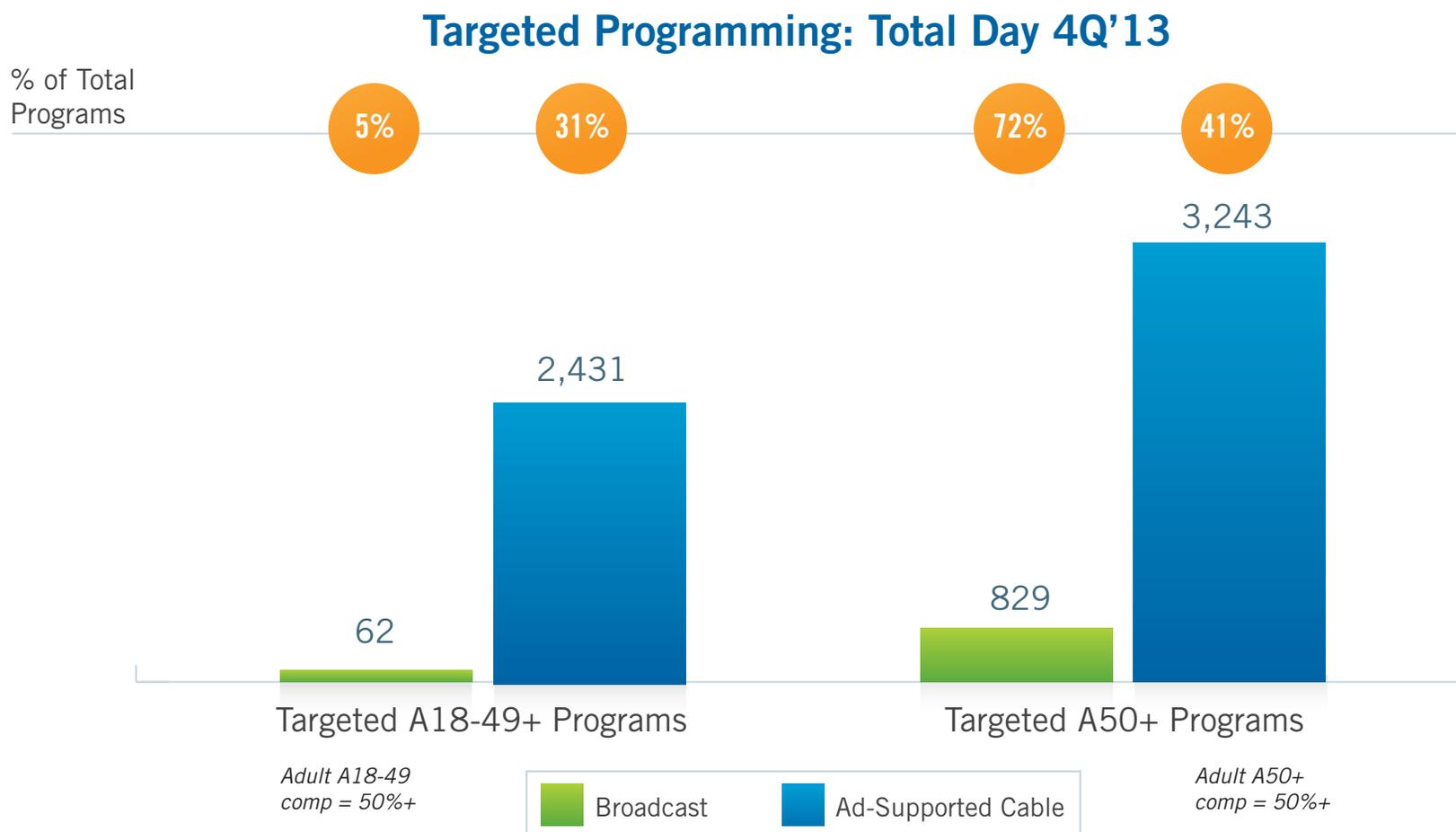


*Time period reflects 4Q only in each year

Source: CAB Analysis of Nielsen Live+7 time period data. Broadcast reflects the "Big 4"

Ad-Supported Cable Offers A Complimentary Mix Of Programming Targeted At Both Adults 18-49 & 50+

For marketers looking to extend their focus beyond 18-49, cable provides a balanced approach, with greater options, while broadcast TV overwhelming targets just the 50+ audience on a limited scale

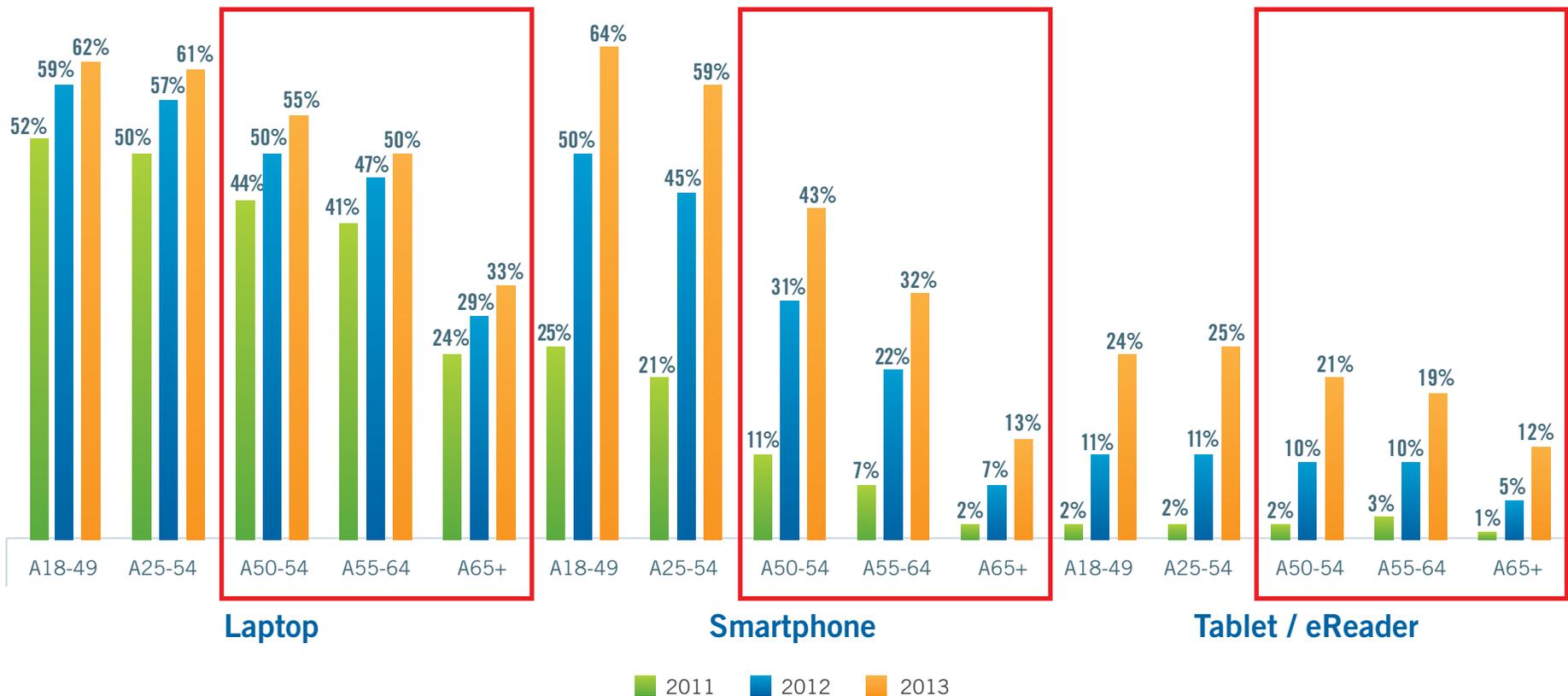


Source: CAB analysis of Nielsen NPower data, Total Day 4Q '13

Adults 50+ Have Been Keeping Pace Recently With Younger Demographics When It Comes To The Velocity Of Device Adoption

Laptop and tablet penetration among Adults 50+ are nearing that of the younger demographics while smartphones close in on 50% coverage

Device Ownership

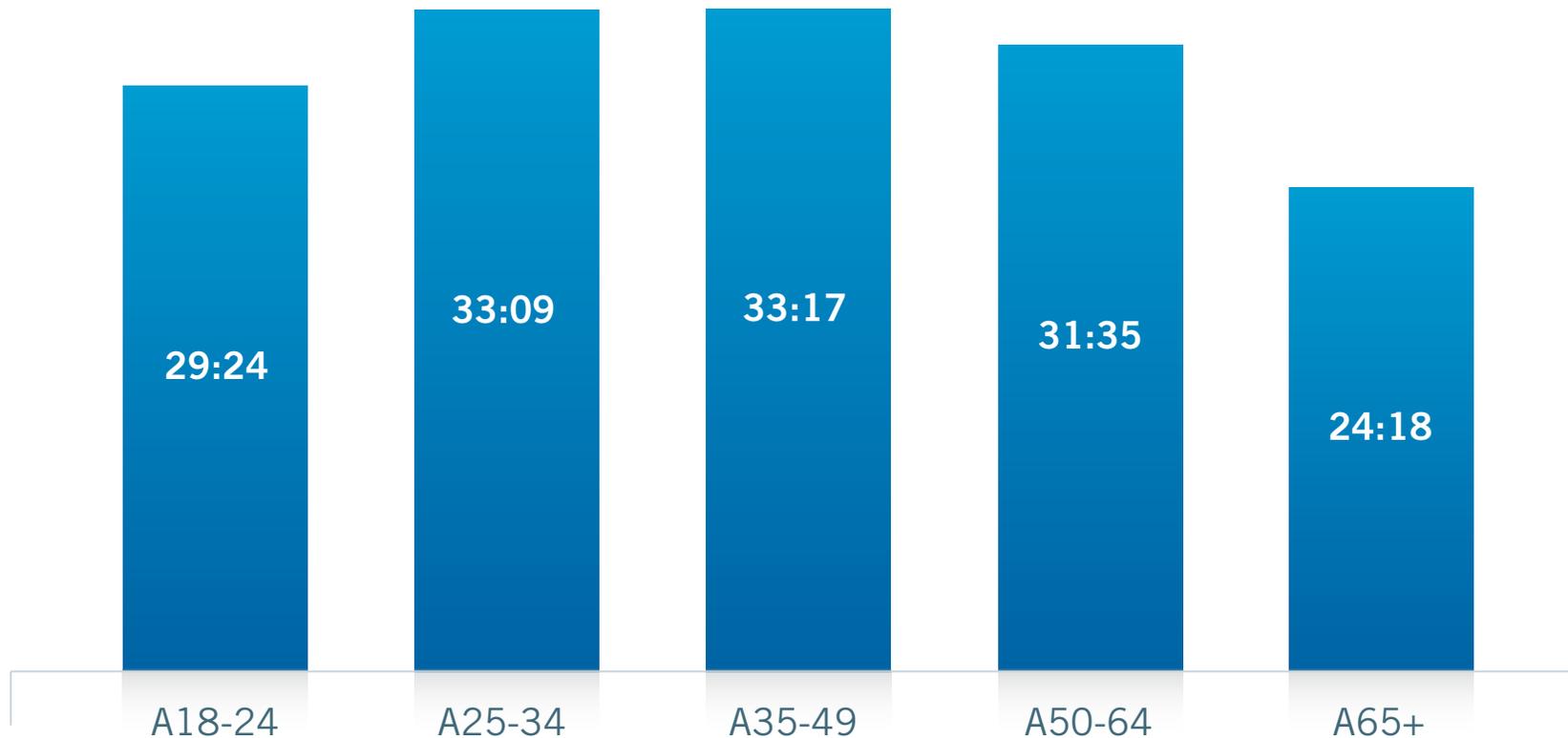


Source: 2011, 2012, 2013 MRI Doublebase

Time Spent Online Among Adults 50-64 Is Nearly Equivalent To The Time Spent By A25-49 And Actually Greater Than A18-24

Monthly Time Spent Using The Internet On a Computer

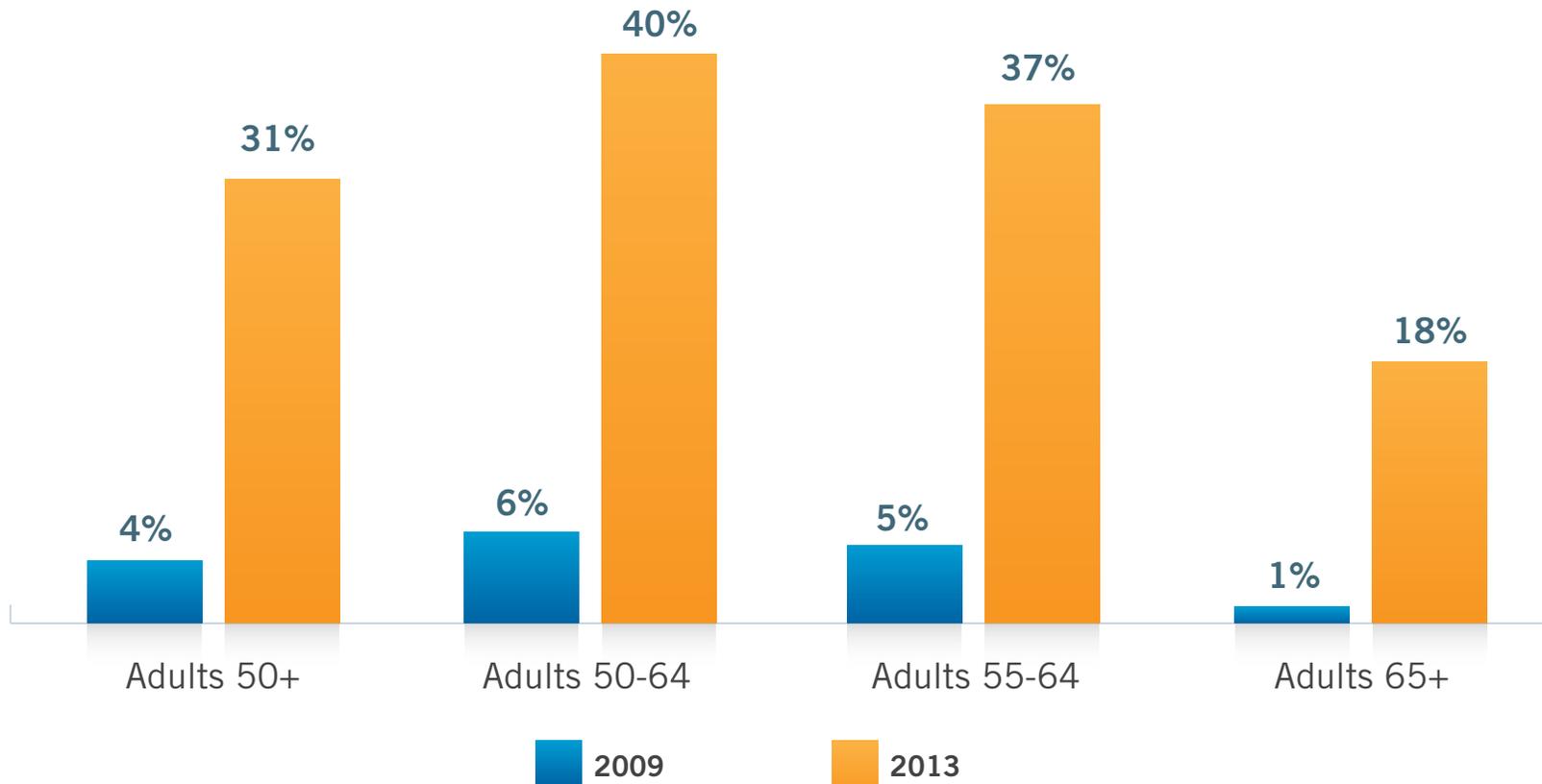
Hours: Minutes



Source: Nielsen Cross Platform Report 4Q13; P2+

Adults 50+ Social Media Usage Has Skyrocketed Over The Last Five Years

Visited A Social Networking Site In The Last 30 Days





CableNation

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