THEY’RE WEALTHY, WIRED AND RISING IN YOUR MARKETS NOW!!

RISE OF THE SILVER SURFER
IN THEATERS JUNE 15 2007
WWW.RISEOFTHESILVERSURFER.COM
Why are we here?
SELL

more things to the same people?

or

the same things to more people?
“population ageing is unprecedented, a process without parallel in the history of humanity…”

50+ population share

Data: Global Demographics

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The only growing segment

* Aus, China, HK, India, Indon, Japan, Korea, Msia, Phils, Spore, Taiwan, Thai, Viet
US$2tr spending power

Retired (65+)
US$ billions

2005: $1,021.2
2015: $1,963.9

Affluent Asia: Japan, Korea, Taiwan, Singapore, Australia
Emerging Asia: China, India, Thailand, Malaysia, Philippines

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Marketing 101
50+ share of spend

**USA:**
- 80% - luxury travel
- 74% - prescription drugs
- 51% - OTC drugs
- 60% - healthcare spending
- 41% - new cars
- 25% - toys
- $7 billion online sales annually

**EUROPE:**
- 45% - new cars & 80% top range
- 50% - face care/cosmetics
- 55% - coffee
- 50% - mineral waters
- 50% - food oils (60% olive oils)
- 40% - yogurts & dairy products
- 35% - travel, 80% cruises
Who are they?
older but not old

and

not all the same
30 years young

BABY  CHILD  ADOLESCENT  YOUNG ADULT

PRE RETIRE  ACTIVE RETIRED  PASSIVE RETIRED  AGED

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Denial

How do you think, feel and behave relative to your actual age?

SilverPoll™ Jan 2009
Don’t call me ‘old’!

Most annoying things about ageing

- The difference between the person I am, and the person I see in the mirror
- Not having the physical energy and strength of my youth
- Needing reading glasses
- Get tired more easily
- Being categorized as an old person

SilverPoll™ Jan 2009
Culture clash

Family welfare remains priority

“Even in retirement my first priority will be to ensure the welfare of my family”
THE RISE OF THE SILVER SURFER
Spot the difference!?

**Weekday Internet**

- **Total**
  - None (0): 6.3%
  - Less Than 15 Mins (7.5): 5.1%
  - 15-30 Mins (22.5): 12.8%
  - 30-60 Mins (45): 13.4%
  - 1-2 Hours (90): 13.0%
  - 2-4 Hours (180): 7.5%
  - 4 Hours + (240): 41.9%

- **Super Silvers 50-65**
  - None (0): 7.4%
  - Less Than 15 Mins (7.5): 11.2%
  - 15-30 Mins (22.5): 13.6%
  - 30-60 Mins (45): 13.9%
  - 1-2 Hours (90): 11.0%
  - 2-4 Hours (180): 7.7%
  - 4 Hours + (240): 41.7%

- **25-49**
  - None (0): 5.8%
  - Less Than 15 Mins (7.5): 6.2%
  - 15-30 Mins (22.5): 14.1%
  - 30-60 Mins (45): 14.1%
  - 1-2 Hours (90): 13.4%
  - 2-4 Hours (180): 13.9%
  - 4 Hours + (240): 13.8%

**Time Spent On Weekday - Internet**

- None (0)
- Less Than 15 Mins (7.5)
- 15-30 Mins (22.5)
- 30-60 Mins (45)
- 1-2 Hours (90)
- 2-4 Hours (180)
- 4 Hours + (240)
# Technology adoption

<table>
<thead>
<tr>
<th>Year</th>
<th>TECHNOLOGY</th>
<th>BOOMER AGE:</th>
<th>GEN Y AGE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>Personal Computer</td>
<td>16 ~ 34</td>
<td>0</td>
</tr>
<tr>
<td>1990</td>
<td>Internet</td>
<td>26 ~ 44</td>
<td>0 ~ 7</td>
</tr>
<tr>
<td>2000</td>
<td>Broadband</td>
<td>36 ~ 54</td>
<td>3 ~ 17</td>
</tr>
<tr>
<td>2010</td>
<td>Cloud</td>
<td>46 ~ 64</td>
<td>13 ~ 27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CULTURE</th>
<th>PRODUCTIVITY</th>
<th>CREATE</th>
<th>FIND</th>
<th>SHARE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Word PowerPoint</td>
<td>Adobe Photoshop</td>
<td>Google iTunes eBay</td>
<td>Facebook MySpace Twitter De.lic.ious Flicker Wikipedia</td>
</tr>
</tbody>
</table>
Who's online in APAC?

Source: comScore Media Metrix, Jan 2009 Asia Pacific Roll-Up and By Country Where Relevant

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Steady Growth

Unique Visitor Growth
15-54 Year Old vs. 55+ Year Old
Asia Pacific

Source: comScore Media Metrix, Jan 2009 Asia Pacific Roll-Up
Spending more time online

Average Minutes Per Day Per User
55+ yo Asia Pacific
Jan ’08 vs. Jan ’09

Jan-09
87.9

Jan-08
82.2

7%

Around 1.5 hrs/day

Duration for 15-54 year olds
Flat to slight decline

Source: comScore Media Metrix, Jan 2009 Asia Pacific
55+ by country

Composition of Persons 55+ Years Old
Accessing the Internet By Country
January, 2009

Regional Average: 7.8%

Japan Up 3.7% pts
From YAG

Source: comScore Media Metrix, Jan 2009 Asia Pacific
By gender

Gender Splits of Persons 55+ Years Old
By Country
January, 2009

Source: comScore Media Metrix, Jan 2009 Asia Pacific
What are they looking at?

Composition Index By Genre of Content
55+ Year Old - Asia Pacific
Jan 2009

Source: comScore Media Metrix, Jan 2009 Asia Pacific
#1 by country

55+ January, 2009

<table>
<thead>
<tr>
<th>Country</th>
<th>Website</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Zealand</td>
<td>My lotto</td>
<td>Gambling</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>Sohu</td>
<td>General info</td>
</tr>
<tr>
<td>Korea</td>
<td>allblog</td>
<td>blog gallery</td>
</tr>
<tr>
<td>Taiwan</td>
<td>Libertytimes</td>
<td>News</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Metrolyrics</td>
<td>Lyrics database</td>
</tr>
<tr>
<td>Japan</td>
<td>Mag2</td>
<td>General info</td>
</tr>
<tr>
<td>Australia</td>
<td>Real</td>
<td>Streaming media</td>
</tr>
<tr>
<td>Singapore</td>
<td>Myflashbox</td>
<td>Shout utility</td>
</tr>
<tr>
<td>China</td>
<td>eBay</td>
<td>Buy/Sell</td>
</tr>
<tr>
<td>India</td>
<td>State Bank</td>
<td>Banking</td>
</tr>
</tbody>
</table>

Source: comScore Media Metrix, Jan 2009 Asia Pacific
Web use

1. EDUCATION
2. INCOME
3. AGE
4. WEB ACTIVITY
5. GEOGRAPHY
they’re wealthy
they’re wired
and
they’re rising in your markets now!!
is age important?

NO

YES
"The computer says I need to upgrade my brain to be compatible with its new software."
Less likely to register

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Left the Web site without registering</th>
<th>Registered but did not complete purchase</th>
<th>Registered and then completed purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seniors (63+)</td>
<td>26%</td>
<td>10%</td>
<td>64%</td>
</tr>
<tr>
<td>Older Boomers (52-62)</td>
<td>24%</td>
<td>7%</td>
<td>68%</td>
</tr>
<tr>
<td>Younger Boomers (42-51)</td>
<td>22%</td>
<td>7%</td>
<td>71%</td>
</tr>
<tr>
<td>Gen X (28-41)</td>
<td>22%</td>
<td>6%</td>
<td>72%</td>
</tr>
<tr>
<td>Gen Y (18-27)</td>
<td>22%</td>
<td>8%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Base: US online shoppers who were required to register on a Web site before making a purchase online
Source: North American Technographics® Customer Experience, Marketing, And Consumer Technology Online Survey, Q3 2007
Web 2.0 technologies can distract the older user. To create, refine and share info, creating a sense of community is NOT AGE SENSITIVE.
Web design

OLDER HANDS
OLDER EYES
OLDER MINDS
Soc net

- 16.5 million adults aged 55+ use social networking
- Fastest growing user segment on Facebook
- MySpace usage surge among the 55+
  - 6.9 million users
  - Av. 204 minutes a month
- One year since AARP.org launched its social networking platform
  - 350,000 users
  - 1,700 groups (gardening to social activism)
- Heaviest users of Second Life
  - 45+ spend 70.17 hrs.p.m
  - 1.2 million residents past 60 days
how older people use websites is age related

what they use the web for might be age-related

importance of the web as a channel is not age-related
huge, untapped opportunity
older but not the same
they’re wealthy, wired and rising in your markets now!!
Silver is **Asia Pacific’s** most insightful and informed authority helping businesses to leverage the rapidly growing **50+** segment.
What we do

**INFORM**
- SilverPoll
  - online survey
- Focus groups
- Silver3D
  - attitudes & behaviours

**ADVISE**
- SilverAudit
- Workshop session
- Executive briefing
- Training
- Corporate strategy
- Brand strategy

**CONNECT**
- Comms planning
- Channel planning

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13 EFFECTS OF AGE

SENSORY

PHYSIOLOGICAL

COGNITIVE

YOUR BUSINESS

VOLUME/VALUE
OPPORTUNITY/RISK

RESEARCH
DATA
SALES TRACKING

MARKETING MIX
PRODUCT/SERVICE
SALES CHANNELS
COMMUNICATIONS

TEAM
ATTITUDE
AWARENESS

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Management

Kim Walker – Founder & CEO
30 years experience including APAC President & CEO of M&C Saatchi, APAC COO Carat Media

Brian Harrison – Partner, South East Asia
Brian is a 40 year veteran of Ogilvy and Y&R. Worked in London, Toronto, Stockholm, New York, and Denmark. Sweden, Ireland and Singapore (CEO of Y&R SEA)

Wendy Tso – Partner, China
20 years experience in marketing, marketing communications and management in USA, Singapore, PRC: HKSAR, Taiwan, Shanghai

P.V. Narayanamoorthy - Head of Insights
Over 30 years experience, he was formerly Strategic Resources Director and board member of Carat APAC

David Lewnes – Partner, Healthcare & Wellness
27 years in the healthcare business, the past 21 years of which have been in Asia including Regional President for the Publicis Healthcare Communications Group

Chris Beaumont – Partner, Japan
30 years experience across Asia Pacific both as a strategic planner and company CEO
Advisory Board

Christophe Bezu
CEO, Adidas Asia Pacific

Brent Green
One of USA’s leading experts on 50 plus marketing

Dr. Yuwa Hedrick-Wong
Chief Economic Advisor, MasterCard Worldwide. Adjunct Professor, School of Management, Fudan University, Shanghai.

Dr. Yasuhiko Kobayashi
Professor of Integrated Communication, Aoyama Gakuin University, Tokyo. President of Japan Academy of Advertising and Director of Nikkei Advertising Research Institute.

Dr. Clint Laurent
Founder, Global Demographics

Prof. David R. Phillips
Chair Professor of Social Policy; Chair, Advisory Board and Founder Director, Asia-Pacific Institute of Ageing Studies, Lingnan University, Hong Kong

Dick Stroud
UK’s leading expert on 50 plus marketing
“For age is opportunity no less than youth itself, though in another dress....”

Henry Wadsworth Longfellow
SILVER
Connecting you to the 50+ market

http://www.silvergroup.asia
http://www.silvergroup.asia/blog

mobile: +65 9155 5567
email: kim@silvergroup.asia
skype: kim.walker