

Gen X:

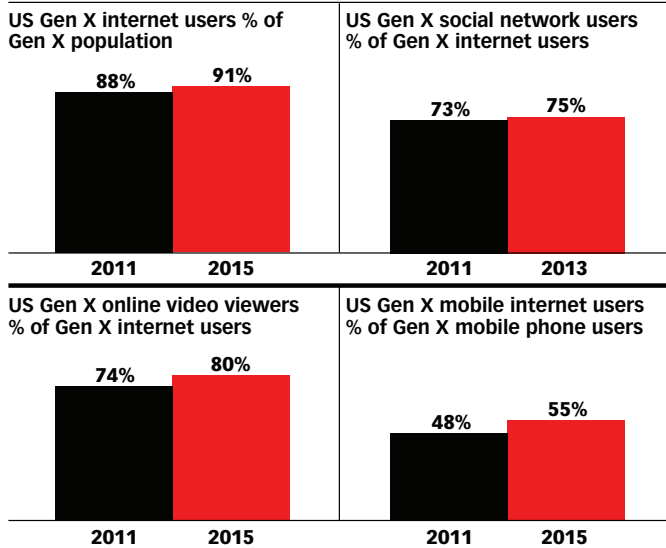
Demographic Profile and Marketing Approaches

Contributors

Lauren McKay, Jennifer Pearson, Monica Peart, Martin Utreras, Haixia Wang

Executive Summary: Flanked by baby boomers and millennials, Generation X is the first generation to come of age with PCs and the internet. Its members are fully comfortable using both traditional and digital media channels. While less numerous than boomers, Gen Xers are an important consumer segment because they are in the prime of their earning and spending potential.

Key eMarketer Numbers—US Gen X



Note: individuals born between 1965 and 1980
Source: eMarketer, July 2011

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Gen X is a transitional generation. It spans the age of traditional media as well as new digital technologies: from cassette tapes to iTunes, VCRs to DVRs, Polaroids to digital cameras, and answering machines to voicemail.

Gen Xers exhibit digital media consumption behaviors similar to millennials: They use social networks, watch video on their computers and mobile devices, and enjoy shopping online. They methodically research and evaluate products prior to purchase and place great value on the opinions of their friends and family.

With strong online and offline media consumption habits, Gen X is an important group for marketers. To effectively engage with Gen X, brands need a strategy that incorporates multiple channels—including mobile, social and online video—with authentic, relevant messaging.

Key Questions

- What are the demographic characteristics of Generation X?
- How do Gen Xers use different media channels?
- How can marketers reach Gen X consumers?

Who Is Generation X?

eMarketer defines Generation X as those born between 1965 and 1980 (currently ages 31 to 46). Since some organizations describe the group with slightly varying age ranges, their definitions are included throughout the report.

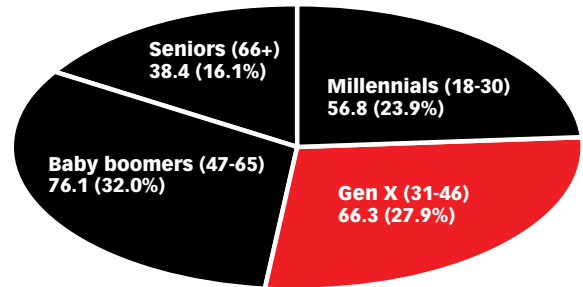


Population

Generation X encompasses 66.3 million US adults born between 1965 and 1980. This demographic segment is well-educated and ethnically diverse. According to the 2009 American Community Survey for the US Census, 87.2% of 35- to 44-year-olds have a high school education or better, and 30.2% hold a bachelor's degree or higher. As the first generation to grow up with PCs, Gen X is a tech-savvy set adept at using digital tools.

Gen X comprises **27.9% of the US adult population**, exceeding the percentage of millennials, but smaller than the baby boomer generation. (US Census Bureau)

US Adult Population, by Generation, 2011
millions and % of total



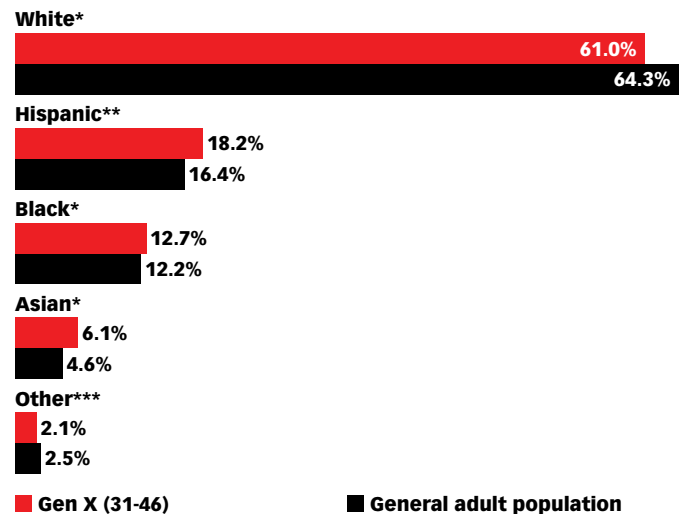
Source: US Census Bureau, Population Division, "Annual Estimates of the Population by Sex and Selected Age Groups for the United States, 2009," March 1, 2011

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The Gen X segment is slightly **more racially diverse than the total population**, but less so than millennials and those born after 2000. More than 18% of the Gen X population is Hispanic, nearly 13% black and over 6% Asian. (US Census Bureau)

US Gen X vs. General Adult Population, by Race/Ethnicity, 2011
% of total



Note: Gen X born between 1965 and 1980; *non-Hispanic; **may be of any race; ***includes American Indians, Alaska natives, native Hawaiians, Pacific islanders and persons of 2+ races

Source: US Census Bureau, Population Division, "Annual Estimates of the Population by Sex and Selected Age Groups for the United States, 2009," March 1, 2011

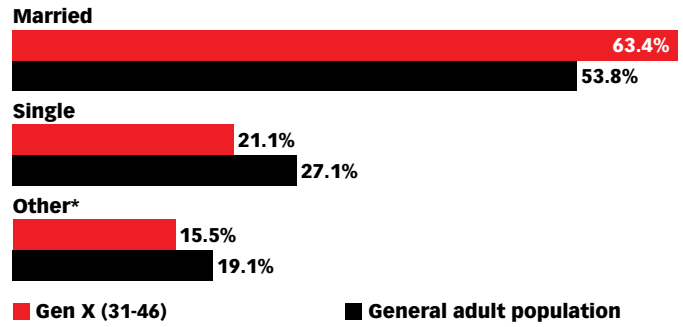
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More than **six in 10 Gen Xers are married**, which is nearly 10 percentage points greater than for the general adult population. (US Census Bureau)

US Gen X vs. General Adult Population, by Marital Status, 2011

% of total



Note: Gen X born between 1965 and 1980; *includes widowed, divorced and separated

Source: US Census Bureau, "Current Population Survey," March 1, 2011

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Income and Expenditures

Gen Xers are entering their peak earning years and tend to hold more senior positions within their companies. They are at a more mature life stage that encompasses both high spending volume and greater financial obligations. Many have established households and started families, significant contributing factors to increased spending.

The **average net income for Gen X households was over \$66,000 in 2009, which was 9.5% greater** than that of total US households. (US Bureau of Labor Statistics)

US Annual Average Household Income*, Gen X vs. Total Households, 2009



Note: *after tax

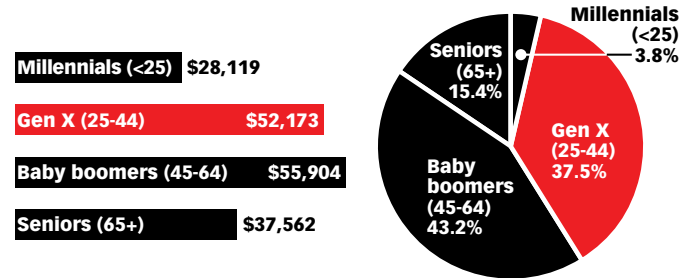
Source: US Bureau of Labor Statistics, "Consumer Expenditure Survey," Oct 5, 2010

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Gen Xers' (defined by the US Bureau of Labor Statistics as ages 25 to 44) **average annual household expenditures** (including food, housing, apparel, transportation, healthcare, entertainment, personal care products and services, education and other) **were over \$52,000 in 2009**, which accounted for 37.5% of total aggregate household expenditures in the US. (US Bureau of Labor Statistics)

US Annual Household Expenditures, by Generation, 2009



Note: numbers may not add up to 100% due to rounding; total US aggregate household expenditures for 2009 were \$5.9 billion

Source: US Bureau of Labor Statistics, "Consumer Expenditure Survey," Oct 5, 2010

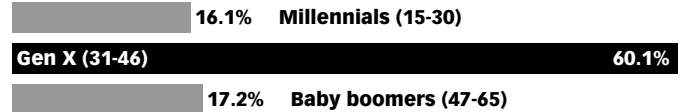
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More than 60% of Gen Xers have children

under the age of 18. (US Census Bureau)

US Population with Children*, by Generation, 2011 % of each group



Note: *under age 18

Source: US Census Bureau, "Current Population Survey," March 1, 2011

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Media Usage

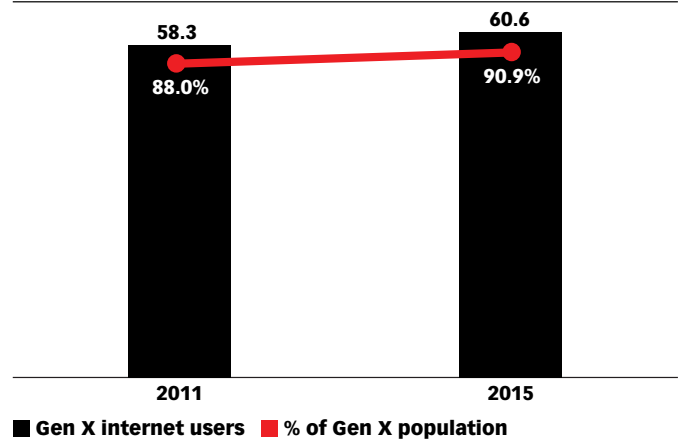
Gen Xers straddle the worlds of old and new media.

While they regularly turn to online channels for news, product information and entertainment, many also access traditional media outlets, such as print and radio, at higher rates than those groups just a few years younger than them.

Internet

eMarketer estimates that **88% of Gen Xers are web users in 2011**, and the number is expected to **increase to 90.9% by 2015**.

US Gen X Internet Users and Penetration, 2011 & 2015 millions and % of Gen X population



Note: individuals born between 1965 and 1980 who use the internet from any location via any device at least once per month

Source: eMarketer, July 2011

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Members of Gen X are highly adept at using digital tools in their daily lives for communication, research, entertainment and shopping.

- On average, 35- to 44-year-olds spent **37.4 hours per month online** in 2010. (*comScore Media Metrix, January 13, 2011*)
- Gen Xers (defined by *Pew Internet & American Life Project* as ages 34 to 45) were more active than millennials in **visiting government websites and obtaining financial information online** in May 2010. (*Pew Internet & American Life Project, "Generations 2010," December 16, 2010*)
- **26%** of Gen Xers (defined by Forrester Research as ages 31 to 40) regularly **used the internet as an information source for food and cooking**, and **61% used it for news** in Q1 2010. (*Forrester Research, "The State Of Consumers And Technology: Benchmark 2010, US," as cited by MediaPost, September 22, 2010*)
- As with the overall adult online population, the **top three online activities** among Gen X internet users included **email, checking news and weather, and banking transactions**. (*Experian Simmons*)

Gen X web users were **more likely than average adult internet users to visit** Columbia House, Shopping.com, LinkedIn and eHarmony, among others. (*Experian Simmons*)

Top 10* Online Activities Among US Gen X** Internet Users vs. Total Adult Internet Users, March 2011

% of respondents in each group

	Gen X internet users	Total adult internet users
1. Email	84.7%	84.0%
2. News/weather	64.2%	58.0%
3. Banking	61.8%	55.7%
4. Shopping—made a purchase	34.6%	33.5%
5. Airline/car/hotel info or reservations	34.0%	32.1%
6. Shopping—gathered information for	31.4%	31.3%
7. Movie information/reviews/showtimes	28.5%	26.5%
8. Read magazines/newspapers	26.6%	22.7%
9. Research/education	25.0%	24.7%
10. Download music profiles	24.7%	23.9%

Note: in the past 30 days; among respondents who are online at least one hour per week from work or home (excluding email); *ranked by Gen X respondents; **ages 35-44

Source: Experian Simmons, "National Consumer Study," June 24, 2011

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Top 10 Websites Among US Gen X Internet Users, March 2011

index

1. Columbia House	225
2. Shopping.com	194
3. LinkedIn	179
4. Citysearch	174
5. Evite	165
6. Monster.com	160
7. USAToday	153
8. AmericanSingles.com	152
9. REALTOR.com	151
10. eHarmony	150

Note: ages 35-44; visited in the past 7 days; among respondents who are online at least one hour per week from work or home (excluding email); indexed to total adult internet users, where 100 is average

Source: Experian Simmons, "National Consumer Study," June 24, 2011

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TV and Online Video

Gen Xers have witnessed major transformations in television. Many remember flipping through only a handful of available channels and seeing a test pattern on the screen when stations went off the air for the night.

Today, by contrast, there are countless channels and what may seem like never-ending TV-like content, including traditional live, DVD, timeshifted, online and mobile. Despite these dramatic changes in delivery, TV remains a significant source of news and entertainment for Gen X. But while they watch more traditional TV than other age segments, they also constitute the largest online video audience.

“This generation still gets most of its media from TV.” —Charlie Taylor, GM of digital marketing at Volkswagen of America, in an interview with eMarketer, June 20, 2011

■ **Nearly three-quarters of Gen X internet users watched their favorite shows live on their home TVs** in October 2010. But they have also watched shows via online video, on-demand video and DVD sets. When it comes to consumption of digital media alternatives to TV, Gen Xers’ habits were more similar to younger internet users than boomers. (Deloitte)

■ TV is their top channel of choice. **85% of Gen X web users preferred to watch their favorite shows on a home TV.** However, more Gen Xers used DVRs than other age groups. (Deloitte)

Methods US Internet Users Have Used to Watch Their Favorite TV Shows, by Generation, Oct 2010

% of respondents

	1	2	3	4	5	6
1 Trailing millennials (14-21)						
2 Leading millennials (22-27)						
3 Gen X (28-44)						
4 Boomers (45-63)						
5 Matures (64-75)						
6 Total						
Live on home TV system	72%	66%	74%	77%	79%	74%
Using DVR on home TV system	33%	27%	39%	28%	29%	32%
Viewing from a free online video service	35%	31%	23%	13%	6%	21%
Using the "on demand" feature on home TV system	27%	19%	23%	16%	15%	20%
Viewing from a show's website	35%	34%	19%	15%	7%	20%
DVD disc sets of prior seasons	26%	34%	23%	13%	5%	19%
Viewing from a video-sharing site	27%	28%	13%	4%	2%	13%
Home video game console	9%	15%	7%	3%	1%	6%
Smartphone or mobile device	12%	6%	9%	1%	-	5%
Portable MP3 video player	12%	5%	6%	2%	1%	5%
Viewing from an online peer-to-peer network	9%	14%	5%	-	-	4%
Handheld video game player	5%	2%	3%	-	1%	2%
Tablet	4%	3%	3%	1%	-	2%

Note: in the past 6 months

Source: Deloitte, "The State of the Media Democracy: Game changing" conducted by the Harrison Group, Feb 1, 2011

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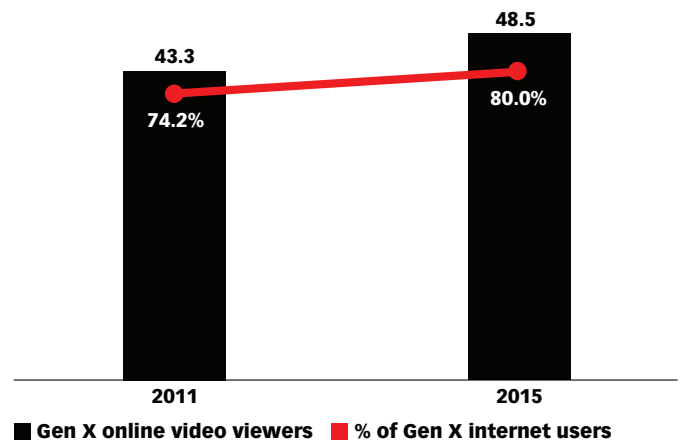
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Similar to other segments of the population, Gen X is increasingly watching video content on the internet and through mobile devices.

eMarketer forecasts that **74.2% of Gen X internet users will watch online video** at least monthly in 2011, and that percentage is expected to grow to **80% by 2015**.

US Gen X Online Video Viewers and Penetration, 2011 & 2015

millions and % of Gen X internet users



Note: internet users born between 1965 and 1980 who download or stream video online via any device at least once per month
Source: eMarketer, July 2011

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Social Networking

Whether to reconnect with childhood friends, share photos of their children or network with colleagues, Gen Xers are increasingly using a variety of social networking sites. While they are not as enthusiastic about social networking as millennials, they use Facebook, LinkedIn and Twitter more than boomers.

eMarketer predicts that **72.8% of Gen Xers internet users will use social networks** at least monthly in 2011. The number is anticipated to increase to **75.1% by 2013**.

Comparative Estimates: US Gen X Social Network Users, 2010 & 2011

% of internet users

	% of internet users	Age	Usage	Survey date
Sheraton Hotels & Resorts, Nov 2010	93.3%	35-44	Use at least weekly	June 2010
eMarketer, July 2011	72.8%	31-46	Use via any device at least once per month	2011
Harris Poll, 2010	71.0%	35-44	Use social media*	April 2010
Deloitte, Feb June 2011	66.0%	28-44	Currently maintain a profile	Oct 2010
Pew Internet & American Life Project, Dec 2010	62.0%	34-45	Use	May 2010
The Media Audit, Jan 2011	61.1%	35-44	Used in the past month	Oct 2010

Note: *includes blogs, microblogs and video-/photo-sharing sites
Source: eMarketer, July 2011; various, as noted, 2010 & 2011

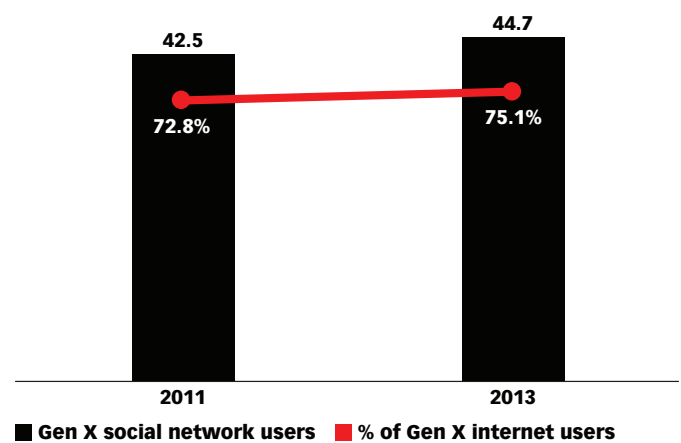
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For additional information about the chart above, see the Endnotes section.

US Gen X Social Network Users and Penetration, 2011 & 2013

millions and % of Gen X internet users



Note: individuals born between 1965 and 1980 who use social networks via any device at least once per month
Source: eMarketer, July 2011

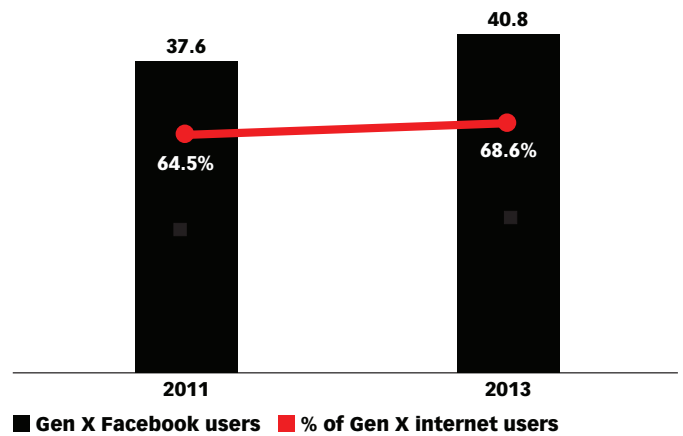
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As with all other demographic segments, Facebook is the most popular social network with Gen Xers. eMarketer forecasts that **37.6 million Gen X internet users will use Facebook monthly in 2011** and the number is expected to increase to **40.8 million by 2013**.

US Gen X Facebook Users and Penetration, 2011 & 2013

millions and % of Gen X internet users



Note: individuals born between 1965 and 1980 who access their Facebook account via any device at least once per month
Source: eMarketer, July 2011

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- 35- to 44-year-olds comprised **16.6% of total US Facebook users** in July 2011. (CheckFacebook.com)

- **More than eight in 10** Gen Xers (defined by Fiserv as ages 31 to 45) **used Facebook** in August 2010. Fiserv did not specify frequency, and included only respondents with checking accounts. (Fiserv)

- Gen Xers tend to be more career-oriented and focused on professional networking than other age groups: **20% of Gen X internet users used LinkedIn** in August 2010, the highest rate of all generations. (Fiserv)

- **More than a quarter (26%) of Gen X internet users accessed Twitter** in August 2010, slightly less than their millennial counterparts (31%). (Fiserv)

Social Networks Used by US Internet Users, by Generation, Aug 2010

% of respondents

	Gen Y (n=582)	Gen X (n=917)	Boomers (n=824)	Seniors (n=197)
Facebook	88%	81%	65%	55%
YouTube	58%	46%	31%	13%
Myspace	44%	30%	16%	7%
Twitter	31%	26%	14%	7%
Classmates.com	10%	17%	21%	23%
LinkedIn	17%	20%	15%	7%

Source: Fiserv, "Financial Institutions and Social Media" in conjunction with The Marketing Workshop, Dec 7, 2010

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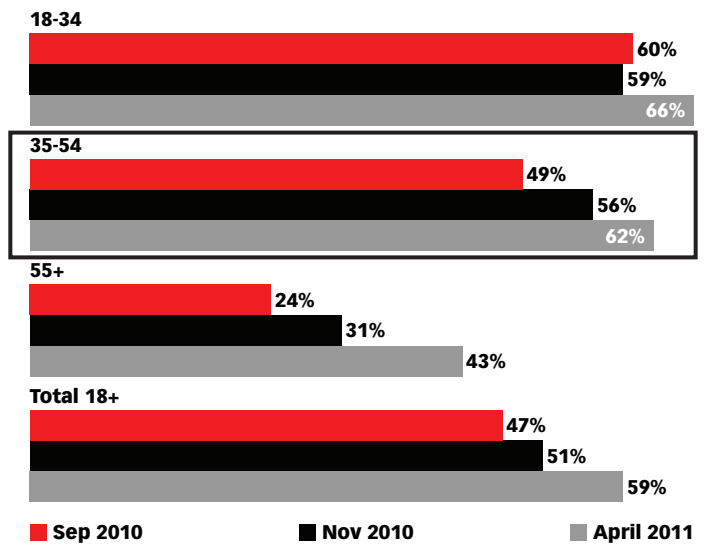
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Gen X Facebook users are increasingly connecting with brands on the social network.

More than six in 10 Facebook users ages 35 to 54 "liked" brands in April 2011. (Wedbush Securities)

US Facebook Users Who "Like" Brands on Facebook, by Age, 2010 & 2011

% of respondents



Source: Wedbush Securities, "The Week in Social Media," May 9, 2011

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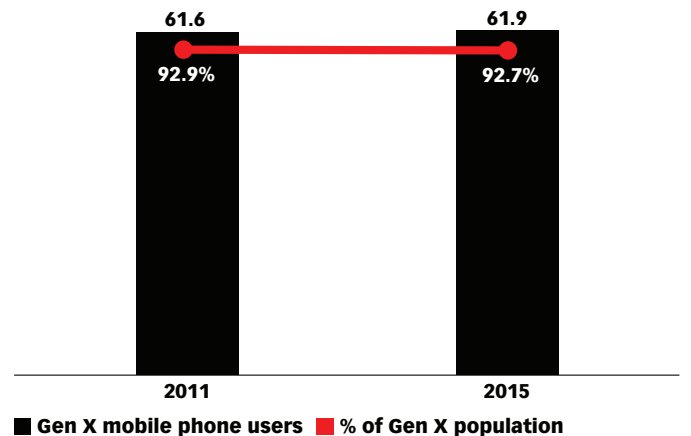
Mobile

Mobile devices are ubiquitous among this on-the-go group, who always want to stay connected.

eMarketer projects that nearly **93% of the Gen X population will use mobile phones** in 2011, and that figure will hold steady through 2015.

US Gen X Mobile Phone Users and Penetration, 2011 & 2015

millions and % of Gen X population



Note: individuals born between 1965 and 1980 who own at least one mobile phone and use the phone(s) at least once per month
Source: eMarketer, July 2011

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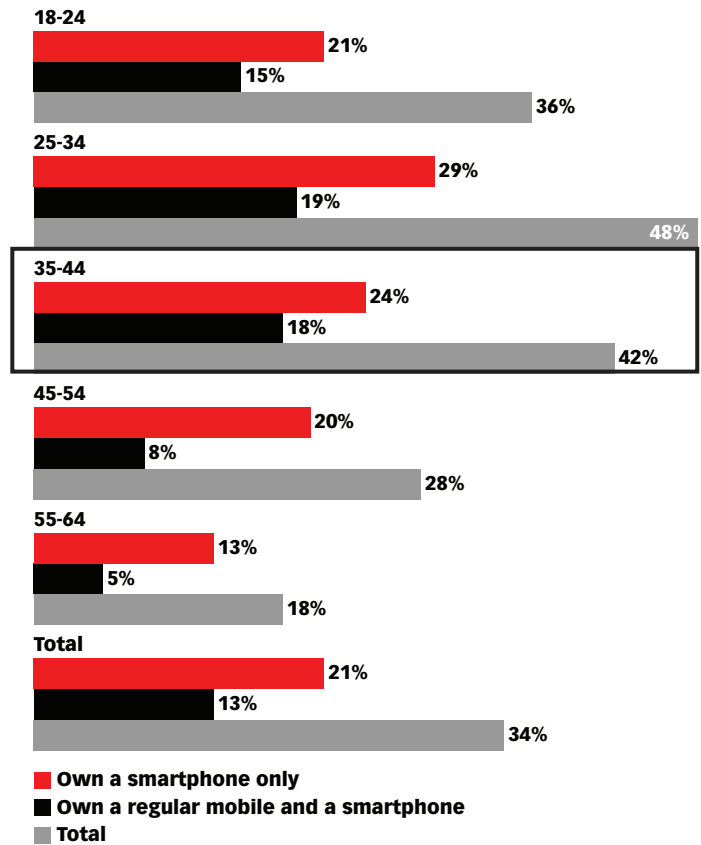
■ **42% of 35- to 44-year-old mobile users owned smartphones** in February 2011.

(Insight Express)

- The average age of smartphone and tablet owners in May 2011 was 31. (Saatchi & Saatchi, "Engagement Unleashed: Gamification for Business, Brands, and Loyalty" conducted by Ipsos OTX MediaCT, June 8, 2011)

US Smartphone Owners, by Age, Feb 2011

% of total mobile phone owners



Source: InsightExpress, "Digital Consumer Portrait," March 1, 2011

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A greater percentage of Gen Xers are using their mobile devices to access the web, either through browsers or apps. Similar to other digital technologies, the mobile internet usage penetration rate among Gen X is lower than that of millennials, but exceeds that of boomers.

Comparative Estimates: US Gen X Mobile Internet Users, 2010 & 2011

% of mobile phone users

	% of mobile phone users	Age	Usage	Survey date
Deloitte, Feb 2011	49%	28-44	Access internet on their mobile phone	Oct 2010
eMarketer, July 2011	48%	31-46	Access internet from a mobile browser or an installed application at least once per month	2011
Antenna Software, Feb 2011	48%	35-44	Access internet at least monthly on their mobile phone	Jan 2011
Pew Internet & American Life Project, Feb 2011	42%	35-46	Access internet at least monthly on their mobile phone	May 2010
EffectiveUI, Nov 2010	39%	35-44	Browse internet on their mobile phone	Oct 2010

Source: eMarketer, July 2011; various, as noted, 2010 & 2011

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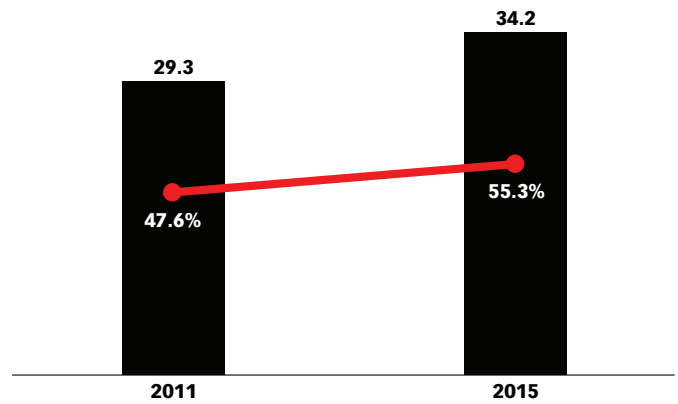
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For additional information about the chart above, see the Endnotes section.

eMarketer estimates that **47.6% of Gen X mobile phone users will access the web from their phones** at least monthly in 2011, and that rate is anticipated to grow to **55.3% by 2015**.

US Gen X Mobile Internet Users and Penetration, 2011 & 2015

millions and % of Gen X mobile phone users



■ Gen X mobile internet users ■ % of Gen X mobile phone users

Note: mobile phone users born between 1965 and 1980 who access the internet from a mobile browser or an installed application at least once per month; excludes SMS, MMS and IM
Source: eMarketer, July 2011

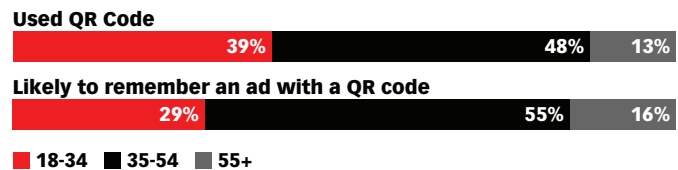
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Gen X smartphone users represent the largest portion of quick response (QR) code users. **Nearly half** (48%) of smartphone users ages 35 to 54 **had used a QR code** in February 2011, and **55% said they were likely to remember an ad with a QR code.** (MGH survey conducted by Vision Critical)

Use and Recall of QR Codes by US Smartphone Users, by Age, Feb 2011

% of respondents



Source: MGH survey conducted by Vision Critical, March 22, 2011

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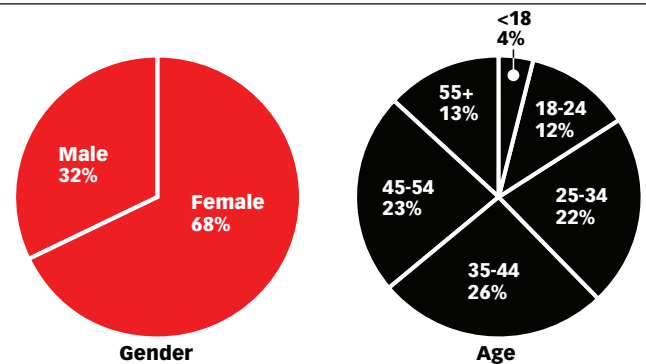
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At 26%, 35- to 44-year-olds comprised the largest segment of QR code users in Q1 2011.

(Mobio)

QR Code Users in North America, by Age and Gender, Q1 2011

% of total



Source: Mobio, "The Naked Facts: QR Barcode Scanning in Q1-2011," May 10, 2011

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Ecommerce and M-Commerce

A growing number of Gen Xers are shopping online via their computers and mobile phones.

- **66% of Gen X internet users** (defined as ages 34 to 45) **had ever purchased a product online** as of May 2010. (*Pew Internet & American Life Project, "Generations 2010," December 16, 2010*)
- Internet users ages 35 to 44 were **slightly more likely to visit online retail sites and significantly more likely to visit mobile retail sites** than the general population. (*comScore*)

US Internet Users Who Visit Online and Mobile Retail Sites, by Age and Gender, Dec 2010 index*

	PC access	Mobile access**
Gender		
Female	101	85
Male	99	117
Age		
12-17	83	91
18-24	104	166
25-34	108	191
35-44	108	120
45-54	108	73
55-64	109	36
65+	111	16

Note: *where 100 equals average representation; **3-month average for period ending Dec 2010

Source: comScore Inc., "State of the US Online Retail Economy in Q4 2010," Feb 17, 2011

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Top product categories purchased online by Gen Xers in fall 2010 included apparel, airline tickets, books and hotel reservations. Gen Xers were also more likely to purchase toys/games, food/groceries, and sports/fitness equipment and apparel online than adults overall. (GfK MRI)

Top 10 Product Categories Purchased Online by US Gen X Consumers, Fall 2010 % of respondents and index*

	% of respondents	Index*
1. Clothing/apparel	21.9%	130
2. Airline tickets	19.9%	114
3. Books	18.2%	113
4. Hotel reservations	16.1%	127
5. Banking services	14.3%	115
6. Shoes/footwear	11.2%	144
7. Toys/games	9.4%	163
8. Mobile phones/accessories	9.4%	129
9. Tickets—movies	7.8%	143
10. Computer software/accessories	7.7%	110

Note: born 1965-1976; purchased in the past 12 months; *vs. total adults ages 18+

Source: GfK MRI, "Survey of the American Consumer," June 1, 2011

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Given their increasing financial obligations—including paying mortgages and saving for retirement and their children’s college funds—Gen Xers tend to be cautious about spending. They often seek out opportunities to save money with online coupons, daily deal sites, price comparison sites and online auction sites.

■ **31% of Gen X internet users (defined as ages 34 to 45) had participated in online auctions** in May 2010. (*Pew Internet & American Life Project, "Generations 2010," December 16, 2010*)

■ **43% of online shoppers who subscribed to daily deal sites** in March 2011 **were ages 25 to 44**. This age segment represented 60% of LivingSocial’s daily deal subscribers. (*ForeSee Results*)

Demographic Profile of US Daily Deals Subscribers, by Company, March 2011

% of respondents

	Groupon	LivingSocial	Google Offers	Total
Gender				
Male	37%	36%	57%	41%
Female	62%	63%	42%	59%
Age				
18-24	9%	11%	14%	9%
25-44	50%	60%	52%	43%
45-64	35%	26%	29%	39%
65+	5%	3%	5%	8%
Income				
<\$20K	7%	6%	8%	10%
\$20K-\$50K	25%	22%	26%	28%
\$50K-\$100K	40%	38%	34%	38%
\$100K-\$150K	15%	16%	15%	12%
\$150K+	5%	7%	6%	7%

Note: numbers may not add up to 100% due to rounding
Source: ForeSee Results as cited in company blog.

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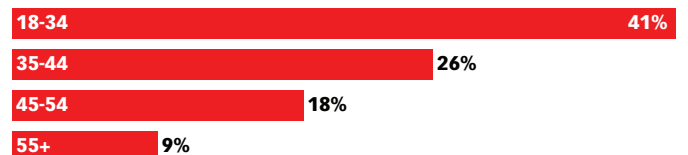
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Constantly on-the-go, Gen Xers use their mobile devices to research products and shop online.

26% of internet users ages 35 to 44 made a mobile purchase in July 2010, compared to 41% of millennials and 18% of 45- to 54-year-olds. (ATG)

US Internet Users Who Have Made a Mobile Purchase, by Age, July 2010

% of respondents in each group



Source: ATG, "Consumer Shopping Experiences, Preferences, and Behaviors," Oct 28, 2010

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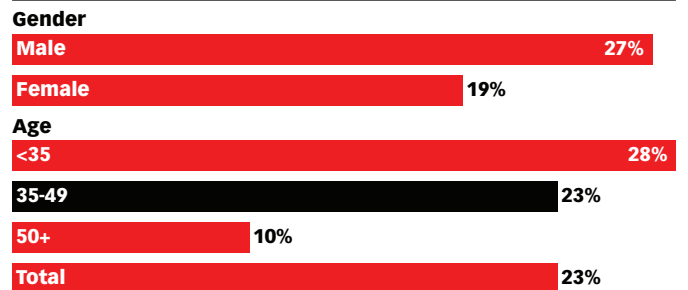
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■ **The top product categories purchased via mobile device** by users ages 30 to 49 in August 2010 included movies, music and games (excluding iTunes and mobile games), apparel, shoes, jewelry, electronics, and books, magazines and newspapers. These were also the top categories of mobile purchases for millennials and boomers. (*Adobe Systems, "Adobe Mobile Experience Survey: What Users Want from Media, Finance, Travel & Shopping" conducted by Keynote Systems, October 13, 2010*)

■ **23% of smartphone owners ages 35 to 49 had made a purchase on their device** in the past month when polled in January 2011. (*Chadwick Martin Bailey*)

US Smartphone Owners Who Have Made a Purchase via Smartphone, by Age and Gender, Jan 2011

% of respondents in each group



Note: in the past month
Source: Chadwick Martin Bailey, "How Smartphones Are Changing the Retail Shopping Experience," March 9, 2011

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Marketing to Gen X

Marketers can engage with Gen Xers through a variety of traditional and digital touchpoints. To effectively reach consumers in this age group, however, marketers must focus more on the message than the media channel.

Gen Xers are generally skeptical of marketing hype and traditional advertising tactics. They appreciate authenticity and relevant messages. Further, consumers in this age group focus more on value propositions and quality than the latest trends. They share positive and negative consumer reviews and experiences with friends, family and others through word-of-mouth—both offline and online via blogs and social networks.

"It's not so much the channel but it's the message within the channel." —Linda Gangeri, manager of national advertising for Volvo Cars, in an interview with eMarketer, June 20, 2011

Multichannel strategies that integrate social, mobile, video and traditional media, and deliver relevance and value through authentic, clear, simple messages will resonate most deeply with consumers in this age group.

Brand Loyalty

Gen X consumers exhibit a strong level of brand loyalty relative to that of millennials and boomers. They have high affinity for the brands they trust and are willing to pay a premium for them. Further, they are less interested in trying new brands than younger consumers.

- In a survey composed of 70% US respondents and 30% from other English-speaking countries, brand loyalty was highest among consumers ages 30 to 49. **More than four in 10 of those in this age group tended to stick with brands they liked.** (Crowd Science)
- Consumers ages 30 to 49 were also the most influential in passing on their brand opinions, with **50% of them providing recommendations and sharing preferences with people they knew.** And more than a quarter (27%) were asked by others to provide their opinions on brands. (Crowd Science)
- Gen X consumers engage with brands through social media channels at approximately the same rate as other groups. **9% of 30- to 49-year-olds regularly followed brands on social media sites** in December 2010, compared to 10% of consumers under age 30 and 8% of survey respondents overall. (Crowd Science)

Attitudes of Internet Users Worldwide Toward Brands and Brand Loyalty, by Age, Dec 2010

% of respondents in each group

	<30	30-49	50+
I often tell my friends or family about brands that I like or dislike	42%	50%	40%
Once I find a brand I like I stick with it	33%	42%	38%
I will always pay more for a brand I trust	30%	34%	29%
When I try something new I try a brand I trust	29%	33%	32%
I always like to try different brands	24%	15%	14%
People regularly ask my opinion about brands of products and services	22%	27%	16%
I regularly follow brands on social media	10%	9%	5%

Note: top-two box (agree)

Source: Crowd Science, "Just Ask! Shopitudes—Brand," April 1, 2011

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Gen X Moms: Connecting for Convenience and Content

Many Gen X moms are simultaneously balancing numerous family and professional responsibilities. According to separate studies conducted by the Coalition for Innovative Media Measurement (CIMM), Magid Generational Strategies and Mom Central Consulting, Gen X moms feel more stressed than boomer and millennial moms, and enjoy the least downtime of moms across all age groups. Messages that convey how a product or service could help mothers accomplish a task more conveniently and efficiently would resonate with this group.

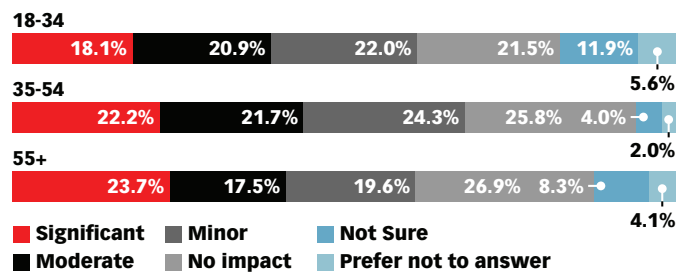
“When trying to reach Gen X moms, marketers should focus more on mom’s ‘me time’ and less on how the product would be great for the family.” —Sharalyn Hartwell, executive director of Magid Generational Strategies, in an interview with eMarketer, June 23, 2011

Gen X moms are digitally plugged in—whether to use email, access social networking sites, read blogs, shop online or for other functional extensions of their everyday lives.

- 68.2% of online moms ages 35 to 54 said their **daily family routine would be disrupted if the internet were taken away for a week.** (Burst Media)
- More than a quarter of moms ages 35 to 54 surveyed **relied most on niche sites (28%) and social media (25.6%) to stay organized.** (Burst Media)

While Gen X moms (defined by CIMM as ages 33 to 46) did not spend as much time socializing during the week as millennial moms (ages 18 to 32), **Gen X moms were more likely to read or send emails than other moms.** (CIMM and Media Behavior Institute)

Level of Disruption to Daily Family Routine if the Internet Were Taken Away for One Week According to US Online Moms, by Age, Dec 2010
% of respondents



Note: n=1,447 with one or more children under the age of 18 at home; numbers may not add up to 100% due to rounding
Source: Burst Media, "What Mom Likes Online: Opinions, Preferences and Behaviors—and the Implications for Brands," Feb 10, 2011
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Weekday Media Activities of US Moms, by Generation, March 2011
% of respondents in each group

	Millennials (18-32)	Gen X (33-46)	Baby boomers (47-64)
Watching TV live	30.3%	23.2%	23.7%
Mobile talk/text	33.3%	24.5%	15.7%
Listening to the radio	20.8%	16.0%	14.4%
Using the internet via a computer	16.3%	15.5%	11.9%
Any social networking	16.3%	8.3%	7.6%
Reading or sending emails	14.3%	17.4%	9.5%

Source: Coalition for Innovative Media Measurement (CIMM) and Media Behavior Institute, "Consumer-Centric Cross-Media Context Planning: Early Insights from CIMM's Pilot Test of MBI's USA TouchPoints," June 14, 2011
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The top reasons why moms ages 35 to 44 began reading mom blogs included **seeking ways to save money and to connect with similar people.** (Unicast)

Reason for Starting to Read Mom Blogs, by Age, Aug 2010

% of mom-blog readers

	25-34	35-44	45-54
I was looking for ways to save money	43.8%	44.5%	58.5%
I had my first child	18.1%	8.6%	0.0%
I wanted to connect with similar people	14.9%	19.6%	14.6%
I was bored and found a site while surfing the net	7.3%	7.5%	6.1%
My friends/family recommended a blog	6.7%	8.4%	7.3%
I wanted general advice on parenting	4.8%	4.2%	3.0%
I went back to work and wanted tips on balance	0.6%	0.8%	0.6%
I'm not sure	2.3%	3.4%	5.5%
Other	1.5%	2.9%	4.3%

Note: n=1,736

Source: Unicast, "Back to School Survey," provided to eMarketer, Aug 31, 2010

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Gen X moms were more likely to notice **online ads with coupons, sales, discounts and promotions** than moms in other age groups. (Unicast)

Types of Ads/Promotions Noticed Online, by Age, Aug 2010

% of mom-blog readers

	25-34	35-44	45-54
Includes coupons, sales, discounts or special promo codes	78.1%	82.2%	79.9%
Promotes a contest to win a prize	69.5%	63.8%	72.8%
Encourages user-generated content	19.6%	17.2%	18.9%
Is customized with local info—like movie listings in a reader's area	38.2%	34.7%	26.0%
Includes surveys or quizzes then shows results in real time	34.8%	30.4%	35.5%
Includes a social media/chat forum to ask questions/share opinions	30.8%	26.8%	26.0%
Includes a video player	30.6%	25.9%	26.0%
Offers exclusive downloadable content (wallpapers, ringtones, trailers)	39.1%	29.7%	36.1%
Includes a Twitter feed	30.5%	33.0%	34.9%
Other	1.0%	3.5%	1.2%

Note: n=1,765

Source: Unicast, "Back to School Survey," provided to eMarketer, Aug 31, 2010

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Spotlight: Auto Brands Rev Up Gen X Targeting

Generation X is a major target for many automakers, including Volkswagen, Volvo and Ford. “Gen X is the sweet spot,” said Charlie Taylor, general manager of digital marketing at Volkswagen of America, in a June 8, 2011, interview with eMarketer.

Volkswagen markets its Jetta, Passat and Beetle models to Gen X, and has gained widespread brand recognition among those consumers. “Everyone will tell you their memories of Volkswagen and how they used to drive a Bus or a Beetle,” said Taylor. “There’s a lot of nostalgia and familiarity.” Despite strong brand awareness, Volkswagen’s challenge has been to effectively convey how its vehicles have evolved to fit the current life stage of Gen Xers.

To do so, the brand targets Gen Xers (defined by Volkswagen as ages 30 to 46) using campaigns that incorporate nostalgia with a modern, digital twist. During the 2011 Super Bowl, for instance, Volkswagen aired a commercial called “The Force,” featuring a young boy dressed as Darth Vader from “Star Wars.” Volkswagen quickly recognized the ad’s viral impact and took to Facebook and YouTube to offer behind-the-scenes trivia and allow consumers to view and share the spot with friends.

To reach Gen X, Taylor recommends a multichannel approach that includes mobile, online video and social media. “It’s more than just thinking about channels, but the right content for this target and then surrounding the target through multiple touchpoints.”

Much like Volkswagen, Volvo is using a multichannel, integrated approach to market to Gen X. According to Linda Gangeri, manager of national advertising for Volvo Cars, Gen X is the first truly web-savvy generation and, therefore, they respond well to online channels and content.

In addition to engaging with consumers through social networks such as Facebook and Twitter, Volvo has tested several mobile and social efforts that have resonated with the Gen X audience. Last fall, for example, Volvo ran

a campaign with MyTown, a location-based social game for iPhones in which gamers could purchase virtual Volvo sedans. “The whole online gaming space is so interesting and it does tap into this age group,” Gangeri said in a June 20, 2011, interview with eMarketer.

More recently, the carmaker partnered with Major League Baseball to create a Volvo-branded wrapper for the MLB At Bat iPad app. Volvo also gave away a free one-month subscription to the app. “It wasn’t that we were just throwing marketing messages at them,” Gangeri. “We were giving them a value proposition. And then if they were interested in learning more about Volvo, they had the opportunity to dig deeper within the app.”

Gangeri underscored that for Gen X, value is key. Not only does the group conduct research prior to making purchase decisions, they tune out gimmicks and marketing hype. “You can make any claim you want with Gen X, but you have to be completely genuine, relevant and transparent because they will check it out,” she said. “And if it’s not true, they will let you and everyone else know.”

Similarly, Scott Kelly, digital marketing manager for Ford Motor Co., told eMarketer in a February 25, 2011, interview, “We find that people don’t trust advertisers—they trust people like themselves. So, if we can encourage people to talk about our products on our behalf... then it’s much more believable than a banner ad or a 30-second commercial.”

In recent years, Ford has made a concerted effort to connect with its target customers through social media channels. The carmaker even launched its 2011 Ford Explorer via Facebook and bowed out of the 2011 Super Bowl in favor of digital media outlets. The Ford Explorer’s “Go. Do. Adventures” campaign, which was targeted primarily to Gen Xers and boomers, encouraged consumers to submit content on how they would use an Explorer to create their own unique adventure. Ford then selected the most unique responses and featured them in videos on Facebook and YouTube.

Conclusions

Gen Xers have growing financial clout. Gen Xers are entering their prime earning years and have a high propensity to spend. They are a valuable consumer segment that marketers should pay attention to.

Gen Xers use both traditional and digital media channels. A multichannel strategy that integrates social, mobile and traditional media would be optimal for engaging this group. Marketers will get the most mileage by focusing on authentic, relevant messages rather than specific channels.

Gen Xers are brand loyalists and influencers. Gen X consumers are more loyal to brands than are other age segments. Marketers can boost loyalty and engagement with online coupons and promotional offers. Gen Xers are inclined to share their opinions on brands and products among peers, so it is important for marketers to ensure their brands are top-of-mind with Gen Xers.

Endnotes

Endnote numbers correspond to the unique six-digit identifier in the lower left corner of each chart. The charts from the report are repeated before their respective endnotes.

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Comparative Estimates: US Gen X Mobile Internet Users, 2010 & 2011

% of mobile phone users

	% of mobile phone users	Age	Usage	Survey date
Deloitte, Feb 2011	49%	28-44	Access internet on their mobile phone	Oct 2010
eMarketer, July 2011	48%	31-46	Access internet from a mobile browser or an installed application at least once per month	2011
Antenna Software, Feb 2011	48%	35-44	Access internet at least monthly on their mobile phone	Jan 2011
Pew Internet & American Life Project, Feb 2011	42%	35-46	Access internet at least monthly on their mobile phone	May 2010
EffectiveUI, Nov 2010	39%	35-44	Browse internet on their mobile phone	Oct 2010

Source: eMarketer, July 2011; various, as noted, 2010 & 2011

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Citation: Antenna Software, "2011 Mobile Internet Attitudes Report" conducted by YouGov, Jan 2011; Deloitte, "The State of the Media Democracy: Game changing" conducted by the Harrison Group, Feb 2011; EffectiveUI survey conducted by Harris Interactive, Nov 2010; Pew Internet & American Life Project, "Generations and their Gadgets," Feb 2011

Comparative Estimates: US Gen X Social Network Users, 2010 & 2011

% of internet users

	% of internet users	Age	Usage	Survey date
Sheraton Hotels & Resorts, Nov 2010	93.3%	35-44	Use at least weekly	June 2010
eMarketer, July 2011	72.8%	31-46	Use via any device at least once per month	2011
Harris Poll, 2010	71.0%	35-44	Use social media*	April 2010
Deloitte, Feb June 2011	66.0%	28-44	Currently maintain a profile	Oct 2010
Pew Internet & American Life Project, Dec 2010	62.0%	34-45	Use	May 2010
The Media Audit, Jan 2011	61.1%	35-44	Used in the past month	Oct 2010

Note: *includes blogs, microblogs and video-/photo-sharing sites
Source: eMarketer, July 2011; various, as noted, 2010 & 2011

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Extended Note: eMarketer data includes sites where social networking is the primary activity (e.g., Facebook, Myspace, LinkedIn), social network sites linked to portals such as Google and niche social network sites devoted to a specific hobby or interest.

Citation: Deloitte, "The State of the Media Democracy: Game changing" conducted by the Harrison Group, Feb 2011; Harris Poll as cited in press release, June 2010; The Media Audit, "2010 National Report," provided to eMarketer, Jan 2011; Pew Internet & American Life Project, "Generations 2010," Dec 2010; Sheraton Hotels & Resorts, "Social Media Survey" conducted by StudyLogic, Nov 2010

eMarketer Interviews

Ford Blends Digital with Branded Content



Scott Kelly
Digital Marketing Manager
Ford Motor Company

Interview conducted February 8, 2011.

How Volvo Targets Gen X Drivers



Linda Gangeri
Manager of National Advertising
Volvo Cars

Interview conducted June 20, 2011.



Sharalyn Hartwell
Executive Director
Magid Generational Strategies

Interview conducted June 23, 2011



Charlie Taylor
GM of Digital Marketing
Volkswagen of America

Interview conducted June 20, 2011

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