

Cwi Associates

How Persons Age 75+ Engage With Media

And

Percent of Seniors Age 65 + By Metro Area
Considering A Move To A Retirement Community

The Media Audit 

Important Tool For The Senior Living Industry

The Media Audit is a syndicated research survey of adults age 18+ implemented annually in **101** US Metro Markets. Starting in 2015 the Media Audit now asks key questions of interest to the Senior Housing Industry:

- Are you considering moving to a retirement community In the next 5 years?
- At the present time, are you considering assisted living facilities for yourself or a family member?

NEXT: Who uses the Media Audit

Demographic, lifestyle, media habit data collected

By metro market, percentage age 65+ intending to consider a move

For Seniors age 75+, how they consume media

The Age 75+ Audience | Cwi Associates – The Media Audit

Total Subscribers Using the Media Audit

Over 700 media subscribers
Over 3200 ad agency subscribers

Data can be used to estimate demand and to “profile” targets defined by any question in the survey including intent to move versus not intending to move. “Targets” can include mixed variables such as AGE and INCOME together.

The 32 page questionnaire identifies:

- How they use all local media and print along with key national print and media. Cable, direct mail, exposure to outdoor, and other factors assessed.**
- Wealth, shopping behaviors, leisure and recreation, and brand preference for automotive, eating out, and other consumer behaviors reviewed.**
- Hospitals used recently and medical specialists used**

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Sample used for this presentation

- For this media review results are shown for **23,392** adults age 75+ randomly selected within 83 metro areas with the sample then balanced to reflect the population weight of each market area

Data can be used to:

- precisely target best media buys by station, program format, and time of day assuring greatest reach with impact.
 - estimate changes in demand pre and post advertising for each market
 - improve partnership and event marketing and list purchase
- .NEXT: Intent to move percentages for selected markets for those age 65+
How seniors age 75+ consume media

The Bigger Picture / On Going Media Audit Syndicated Research

- 1,200 interviews per market by phone with adults age 18+ with one or two survey waves per metro market each year.
- The “senior” interview count is proportionate to their share of the adult population
- The “seniors” segment in the future can be “rolled up” so that each metro has “senior” data from more than one research wave thus producing for each market a larger relevant sample.

Below we present example data for age 65 + from currently available markets. Data for age 75 plus is also available.

Age 65+ Intent To Consider A Move To A Retirement Community

Market	State	Age 65+	% of Age 65+	Age 65+ 5 YR Consider Move
Austin	Texas	176,511	7.70%	13,593
Birmingham	Alabama	148,924	2.94%	4,382
Chicago	Illinois	1,179,996	7.97%	94,063
Cincinnati	Ohio	284,118	9.85%	27,992
Colorado Springs	Colorado	74,194	6.13%	4,550
Ft. Myers	Florida	251,857	8.18%	20,602
Harrisburg	Pennsylvania	111,281	10.88%	12,111
Huntsville-Decatur	Alabama	75,614	5.08%	3,838
Jacksonville	Florida	182,532	5.48%	10,003
Madison	Wisconsin	72,556	14.25%	10,341
Nashville	Tennessee	190,963	6.26%	11,953
New Orleans	Louisiana	198,970	5.27%	10,490
New York	New York	2,687,162	6.23%	167,350
Peoria	Illinois	76,412	13.27%	10,141
Philadelphia	Pennsylvania	754,075	14.84%	111,895
Pittsburgh	Pennsylvania	422,744	7.33%	31,004
Portland	Oregon	333,799	7.34%	24,502
Reno	Nevada	70,524	8.89%	6,269
Sarasota	Florida	215,209	8.57%	18,441
Southern New Hampshire	New Hampshire	161,503	11.27%	18,203
Topeka	Kansas	36,828	12.46%	4,587
Toledo	Ohio	87,432	9.52%	8,327

EXPOSURE TO RADIO

54.8% Did NOT listen To Radio During The Week

When Listen To Radio	Percent Listening
5AM-10AM	27.1
10AM-3PM	27
3PM-7PM	19.1
7PM-12AM	10.9
12AM-5AM	5.1

The same person can be listening in more than one time frame so these percentages do not add to 100. Bear that in mind as we look at other stats such as the radio format they prefer. And when preferred radio format and time frame are taken together the data suggest these folks are easy to target as a group.

Radio Format They Prefer

Formats with 5% or more listening

News, Talk and Public Radio reach 65.5% of adults age 75+.

News**Net is the net audience of all of the different News formats...same with Talk. News/Talk is a slightly different format. Some stations are just News, some are just talk shows. News/Talk refers to those stations that classify themselves that way. Example...a news station that also carries shows such as Rush Limbaugh.

<u>Format</u>	<u>Percent</u>
NEWS**NET	26
TALK**NET	25.8
NEWS TALK	17
PUBLIC RADIO	13.7
TALK	8.3
NEWS	8.1
SPORTS**NET	8
SPORTS NOT ESPN	5.9
CLASSICAL	5.5

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Newspaper	Percent
DAILY N-PAPER*Week DAY	57.8
DAILY N-PAPER*SUNDAY	61.3
DAILY N-PAPER*WD/SUN	64.7

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When Viewing TV

8.5% No TV Exposure Average Day

When Viewing TV	Percent
BETWEEN 5 00 AM AND 7 00 AM	22.7
BETWEEN 7 00 AM AND 9 00 AM	36
BETWEEN 9 00 AM AND 4 00 PM	48.1
BETWEEN 4 00 PM AND 5 00 PM	45.2
BETWEEN 5 00 PM AND 6 00 PM	56.6
BETWEEN 6 00 PM AND 7 00 PM	64.6
BETWEEN 7 00 PM AND 7 30 PM	66.5
BETWEEN 7 30 PM AND 8 00 PM	66.3
BETWEEN 8 00 PM AND 10 00 PM	55.4
BETWEEN 10 00 PM AND 11 00 PM	28.7
BETWEEN 8 00 PM AND 11 00 PM	67.3
BETWEEN 11 00 PM AND 11 30 PM	31.3
BETWEEN 11 30 PM AND 1 00 AM	16.4

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For each local metro media the data can tell you “reach by media outlet” – the extent to which EACH of your local media options reaches each relevant age group. It will also tell you this by day part and program type.

For example, let’s look at Seniors 75+ and their preference among news outlets and cable networks.

HAVE CABLE AND/OR SATELLITE	79.2
DO NOT HAVE CABLE OR SATELLITE	20.8

View The News | When

“Fox” refers to local Fox network news and NOT FOX NEWS cable

MORN NEWS*NBC	13.6
MORN NEWS*ABC	14.2
MORN NEWS*CBS	13.5
MORN NEWS*FOX	8.8
MORN NEWS*CW	1.8
EARLY NEWS*NBC	33.1
EARLY NEWS*ABC	35.3
EARLY NEWS*CBS	33.2
EARLY NEWS*FOX	19.2
EARLY NEWS*CW	4
EARLY NEWS*MY TV	2.1
EARLY NEWS*TEL	0.9
EARLY NEWS*UNI	1.4
PRIME NEWS*FOX	17.8
PRIME NEWS*CW	3.8
PRIME NEWS*MY TV	1.9
LATE NEWS*NBC	17.4
LATE NEWS*ABC	17.6
LATE NEWS*CBS	17.7
LATE NEWS*FOX	9.6

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Cable Channels They Prefer

Cable Network	Percent Watch During Week
FOX NEWS CH.	45.4
THE WEATHER CH	42.3
CNN	36.4
DISCOVERY CH.	32
ESPN	30.8
MSNBC	27.4
TNT	26.2
FOX SPORTS NET	22.4
ESPN 2	21
USA NETWORK	19.1
LIFETIME	18.5
CNBC	17.3
HEADLINE NEWS	17.3
A&E	15.5
ABC FAMILY	15.2
DISNEY CHANNEL	7.8
COMEDY CENTRAL	7.1
BET	5.2
MTV	5
SPIKE TV	4.5
NICKELODEON	2.9
DISNEY XD	2.8
VH-1	1.9

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TELEVISION EXPOSURE Average Day:	Percent
HEAVY 300 MINUTES +	32.5
MEDIUM 180-299 MIN.	37.1
LIGHT 1-179 MIN.	21.9
NONE 0 MIN.	8.5

RADIO EXPOSURE Average Day	Percent
HEAVY 180 MINUTES +	13.6
MEDIUM 60-179 MIN.	21.1
LIGHT 1-59 MIN.	10.4
NONE 0 MIN.	54.8

NEWSPAPER EXPOSURE Average Day	Percent
HEAVY 60 MINUTES +	36.6
MEDIUM 30-59 MIN.	22.3
LIGHT 1-29 MIN.	7.7
NONE 0 MIN.	33.3

Direct Mail

**25.3% do not recall receiving direct mail in the past week.
(Recall this is ALL age 75+ and not age by income)**

HEAVY EXPOSURE DIRECT MAIL--75%+ READ WEEKLY	21
MEDIUM EXPOSURE DIRECT MAIL--25-74% READ WEEKLY	20
LIGHT EXPOSURE DIRECT MAIL--1-24% READ WEEKLY	34

Yellow Pages

YELLOW PAGE BOOK REGULARLY FIND NUMBERS/BUSINESSES	15
YELLOW PAGE BOOK REG./OCC. FIND NUMBERS/BUSINESSES	77

Exposure to Outdoor Advertising / Miles Drive	Percent
HEAVY EXPOSURE OUTDOOR--200+ MILES AVG. WEEK	14.9
MEDIUM EXPOSURE OUTDOOR--100-199 MILES AVG. WEEK	27.8
LIGHT EXPOSURE OUTDOOR--1-99 MILES AVG. WEEK	50.6
NONE EXPOSURE OUTDOOR--0 MILES AVG. WEEK	6.7

MOST are NOT exposed to the internet

Daily Internet Use	Percent
HEAVY EXPOSURE INTERNET--180+ MINUTES TYP. DAY	6
MEDIUM EXPOSURE INTERNET--60-179 MINUTES TYP. DAY	19
LIGHT EXPOSURE INTERNET--1-59 MINUTES TYP. DAY	16.5
NONE EXPOSURE INTERNET--0 MINUTES TYP. DAY	58.5

NOW OWN--E-READER	12.9
NOW OWN--SMARTPHONE	7.2
NOW OWN--TABLET	6.7

Now let's look at the web sites that seniors as a group visit at least once per month. Be careful in drawing digital ad buying / content design conclusions for this basic table. Results no doubt vary somewhat by market and age 75+ target. And for "children of" the overall age 75+ target the results are no doubt different.

Web Sites Visited

“Major Dailies” = local newspaper web site

Web Site: Visited Past Month > 3%	Percent
GOOGLE	30.3
YAHOO	19.4
FACEBOOK	14.9
MAJOR DAILIES.COM	11.7
YOUTUBE	10.3
MSN	6.6
NBC.COM	5.8
PBS.ORG	5.8
ABC.COM	5.5
CBS.COM	5.4
BING	4.6
FOX.COM	3.7
LINKEDIN	3.1
GROUPON	3.1

Fun Facts

12.6% are not yet retired

38.7% Married

46.3% Widowed

40.3% Men

21.8% of all adult Buick owners are age 75+ BUT

“only” 9% of those age 75+ own a Buick;

17% own a Ford

30% have a land line only [no cell phone]

For these two restaurants in the examined markets less than 1% overall of persons age 75+ ate there BUT:

30.1% of all adults at a Cracker Barrel in the last 4 weeks were age 75+

24% of all adults at a Denny’s in the last 4 weeks were age 75+

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For those who are interested, next steps can include

- 1) surveys and this data to identify if occupancy relates to market size, your lead pool quality or market reaction to your product / competitors
- 2) using the data to short list media outlets and create media plans and marketing partnerships
- 3) ad tracking / lead generation review including the tracking of digital advertising to improve lead quality ROI
- 4) pre and post ad campaigns reviewing your market position against competitor's and the strength of your lead program -- determining lead pool move-in potential
- 5) bench mark several market areas if needing to compare and contrast market performance. [Roll up data weighted by market]

Email info@cwi-associates.com to get on the list for a free report of “intent to move to a retirement community” as your market area becomes available. Services to Senior Housing overview and other free reports [HERE](#).