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# Four Truths about US Hispanic Consumers

Google/OTX

U.S., October 2010

# Methodology

Google commissioned Ipsos OTX MediaCT, an independent market research company, to conduct research to gain insight into the behavior of US Hispanics when using the internet, specifically among the three different segments of Spanish Dominant, English Dominant and Bilingual US Hispanics.

To address these objectives, OTX conducted Attitude & Usage survey among these groups.

All qualified respondents were US residents age 18+, internet users and have purchased at least one of the following in the next 6 months:

- Auto
- Retail
- Tech
- CPG

Each respondent was assigned into one of the product categories they qualified for and answered a subset of questions specific to their category purchase.

Interviews were conducted in October, 2010 yielding a total sample of 4,117 respondents.

On average, the survey took approximately 20 minutes to complete.

# The Four Truths About Hispanics...

**1** Hispanics are  
**High Speed**



**2** Hispanics are  
**Social Media Shoppers**



**3** Hispanics  
**Maximize Mobile Media**



**4** Online is Hispanics'  
**GPS to the Store**



# The Four Truths About Hispanics...

## 1 Hispanics are High Speed



Hispanics devour digital media over high speed connections. Be culturally relevant across all digital mediums.

## 2 Hispanics are Social Media Shoppers



Video drives online and offline purchases. Leverage YouTube, the largest online video inventory, to reach this demographic.

## 3 Hispanics Maximize Mobile Media



Hispanics over-index on smartphone adoption. Join the conversation when they are on the go and searching locally.

## 4 Online is Hispanics' GPS to the Store



Online advertising drives both in store and online transactions. Think digital first when you define your marketing strategy.

Truth #1:  
**Hispanics are  
High Speed**





# No More Digital Divide...



**86%**  
of Hispanics online  
have broadband

Source: Google US Hispanics 2010, October 2010, OTX.  
Base: Total. TECH2. What type of Internet connection(s) do you have in your home?  
A box (letter) indicates significant difference from comparative group(s) at 95% confidence.

# ...and Rely on the Internet

# 78%

Use the internet as  
a Primary Source  
of Information



Source: Google US Hispanics 2010, October 2010, OTX.

USH4. Now we'd like to get a sense of how you gather information. Please select all the sources you use to learn about products or services that you purchase. A box indicates significant difference from comparative group(s) at 95% confidence.

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# Search and Video Drive Media Usage

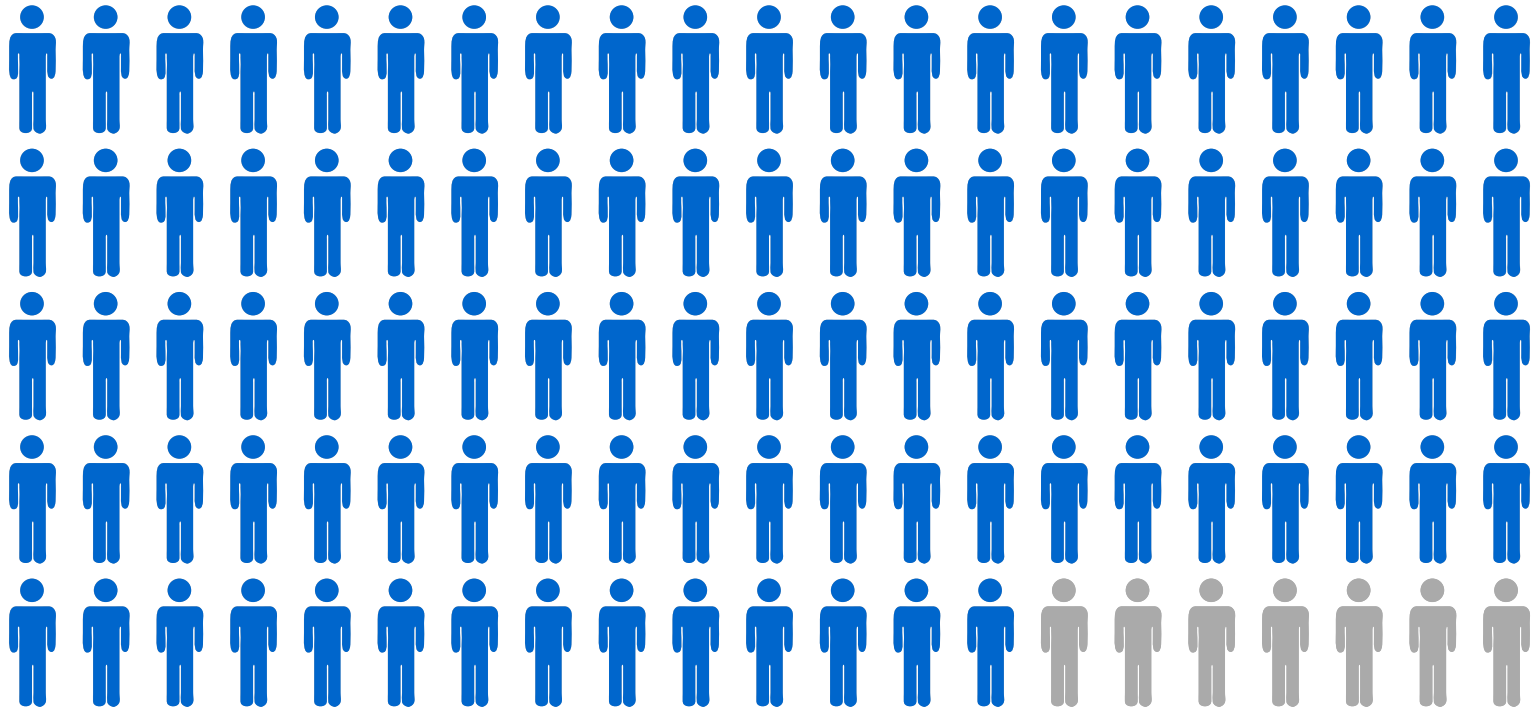
84%

of US Hispanics typically use  
Search Engines for Information



# US Hispanics Are Google Users

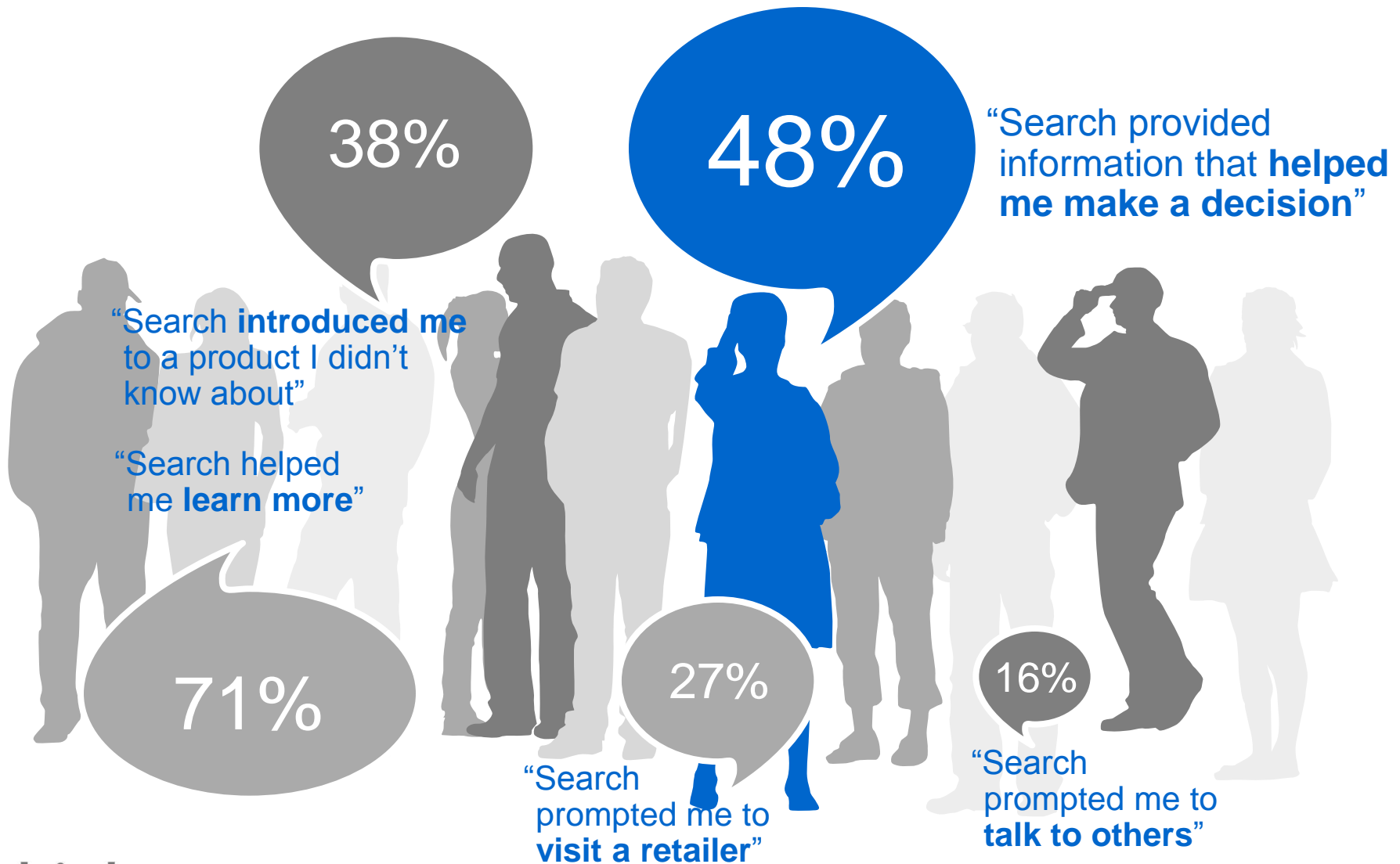
93% of US Hispanics use Google as their primary search engine



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Source: Google US Hispanics 2010, October 2010, OTX  
Base: Search Engine Users. Which of the following search engines do you use to gather information online? / A box (letter)  
indicates significant difference from comparative group(s) at 95% confidence.

# Search Prompts Action



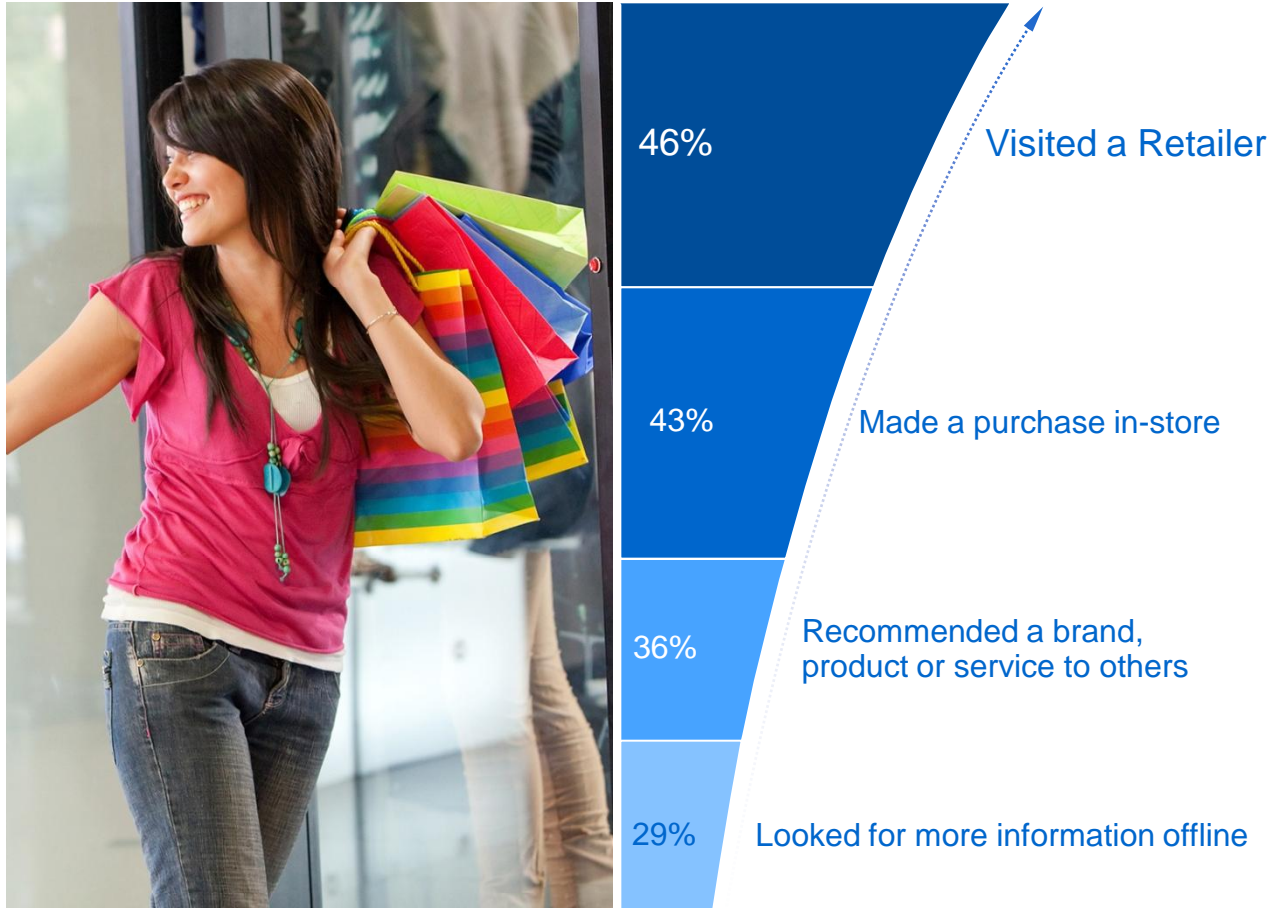
# Search Generates Distinct Online & Offline Action for US Hispanic Advertisers

## Online Actions



# Search Generates Distinct Online & Offline Action for US Hispanic Advertisers

## Offline Actions





# TV Is an Effective Trigger to Search



78%

of Hispanics have used a search engine to find more information on something seen on TV

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Source: Google US Hispanics 2010, October 2010, OTX

Base: Search Engine Users

S5. Have you ever used a search engine to find more information on something that you ...

A box (letter) indicates significant difference from comparative group(s) at 95% confidence.

Truth #2:  
**Hispanics are Social  
Media Shoppers**



# Hispanics Visit Video Sites more Often

**64%** of Hispanics visit video sharing sites



vs. **50%** of the general population

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Source: Google US Hispanics 2010, October 2010, OTX

Base: Visit online video sites V1. Earlier you mentioned that you visit online video sites to gather information.

Which of the following online video sites do you visit?

A box (letter) indicates significant difference from comparative group(s) at 95% confidence.



# Hispanics Watch a Variety of Videos Online & Engage with Longer Form Content

US Hispanics watch a significant amount of professionally produced videos



67%

movie clips & trailers

44%

technology related videos

Over 30%

product reviews; beauty and fashion videos; health related videos

Source: Google US Hispanics 2010, October 2010, OTX  
Base: Visit online video sites V2. In general, which of the following types of videos do you typically watch on the Internet? Please select all that apply.  
A box indicates significant difference from comparative group(s) at 95% confidence.

# Video Is a Social Activity



**57%** of Hispanics  
share videos

Hispanics **read comments**  
**on videos**  
as often as the  
general population but **are**  
**more likely to leave**  
**comments**

Source: Google US Hispanics 2010, October 2010, OTX  
Base: Visit online video sites

V3. Which of the following activities do you do when you're on online video sites, if any? Please select all that apply.  
A box indicates significant difference from comparative group(s) at 95% confidence.



# YouTube Consumption



# 94%

of US Hispanics who watch online  
video visit YouTube

Source: Google US Hispanics 2010, October 2010, OTX  
Base: Visit online video sites  
V1. Earlier you mentioned that you visit online video sites to gather information.  
Which of the following online video sites do you visit?  
A box (letter) indicates significant difference from comparative group(s) at 95%  
confidence.

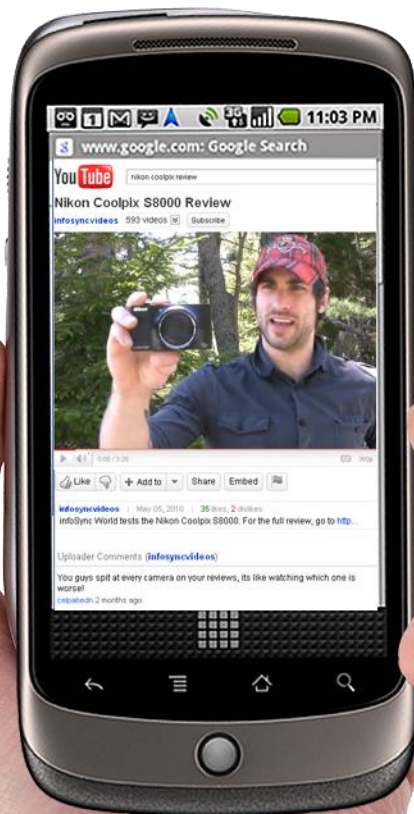
with Google

# Video Provides a Wealth of Relevant Product Information

When  
Hispanics view  
videos while  
shopping,

66%

consider  
product  
reviews and  
ratings.



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Source: Google US Hispanics 2010, October 2010, Q1  
Base: Visit online video sites (& have taken action as a result)  
V5. Which types of online videos have you viewed while shopping or making purchasing decisions? Please  
select all that apply.  
A box indicates significant difference from comparative group(s) at 95% confidence.

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# Video Drives Purchases Online and Offline

# 41%

of Hispanics watching video leads to a purchase online...

# 33%

made a purchase in-store



Source: Google US Hispanics 2010, October 2010, OTX  
Base: Visit online video sites (& have taken action as a result)  
1/5. Which types of online videos have you viewed while shopping or making purchasing decisions? Please select all that apply. A box indicates significant difference from comparative group(s) at 95% confidence.



Truth #3:  
**Hispanics Maximize  
Mobile Media**



# Hispanics Maximize Mobile Media

93% of US Hispanics use a mobile phone regularly



Source: Google US Hispanics 2010, October 2010, OTX  
Base: Total M1. Which of the following types of mobile phones, if any, do you use regularly?

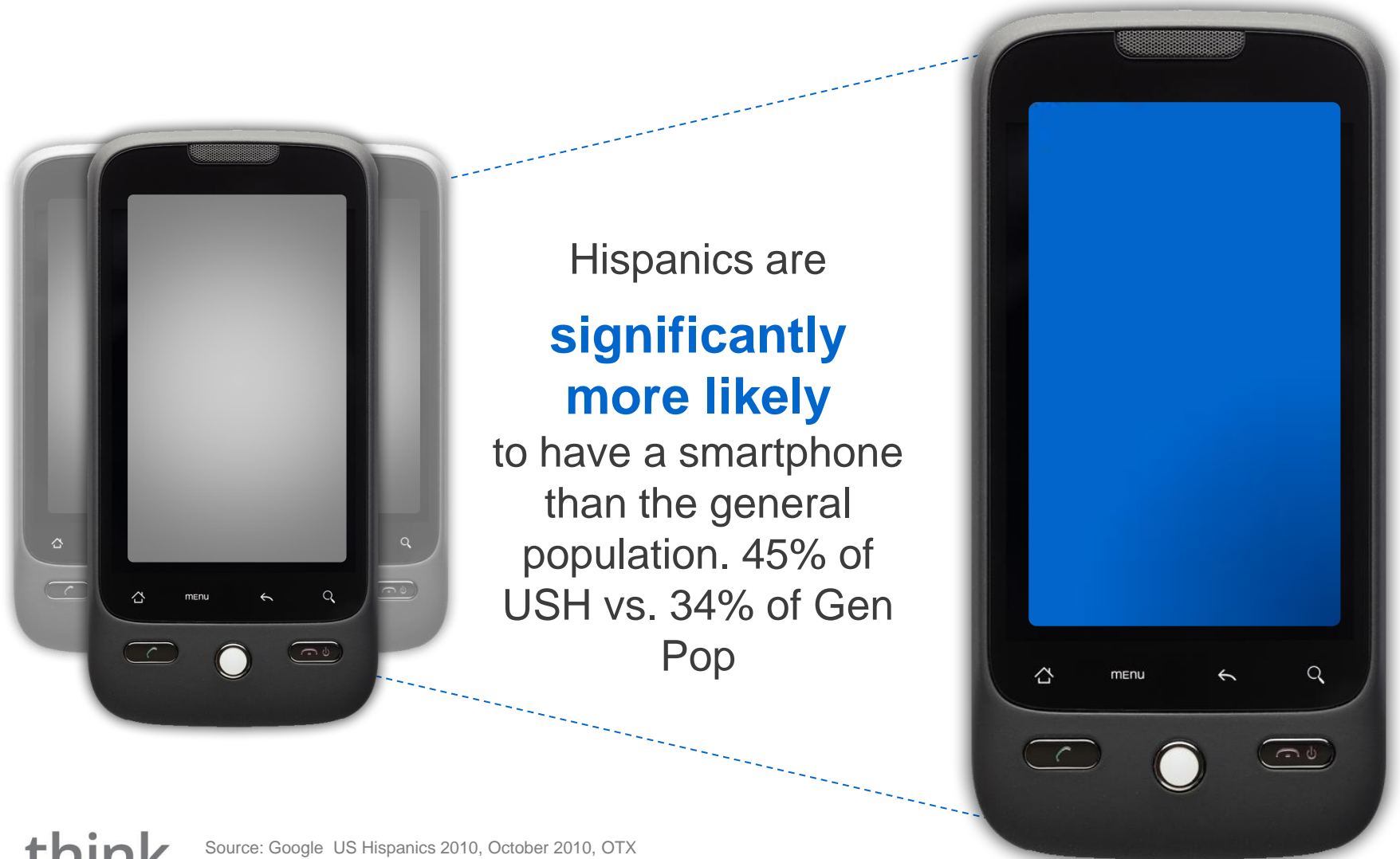


# Most Hispanics Have 'Contract Plans'

**87%** of  
U.S. Hispanics who  
use mobile phones  
have 'contract plans'  
with only **8%** opting  
for pre-paid  
alternatives

Source: Google US Hispanics 2010, October 2010, OTX  
Base: Use smartphone regularly M3. Which of the following best describes the type of service you have on your smartphone? A box (letter) indicates significant difference from comparative group(s) at 95% confidence.

# Hispanics Maximize Mobile Media

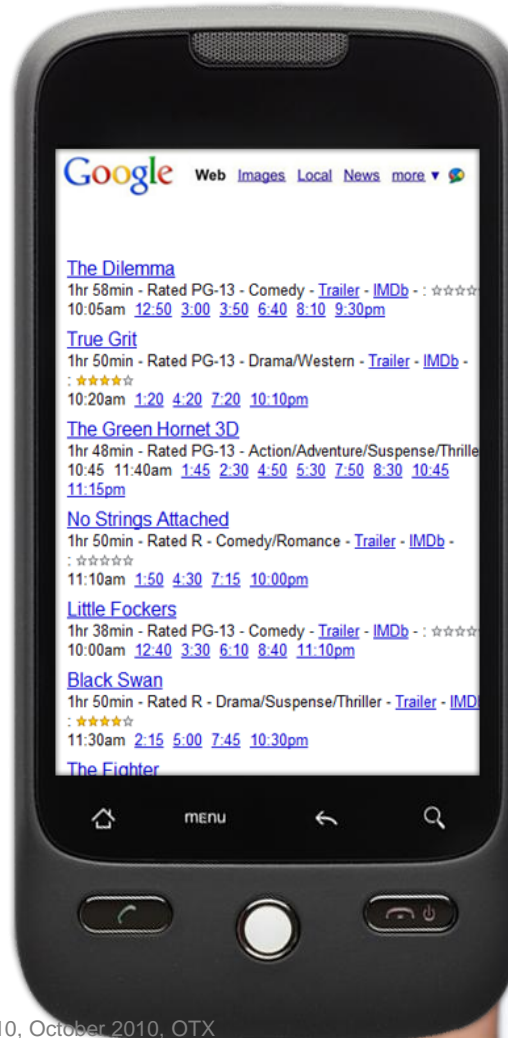


Hispanics are  
**significantly  
more likely**  
to have a smartphone  
than the general  
population. 45% of  
USH vs. 34% of Gen  
Pop

# Search Dominates Smartphone Usage

# 70%

of Hispanics use their smartphones to search making search engines the most popular websites visited by Hispanics on smartphones.

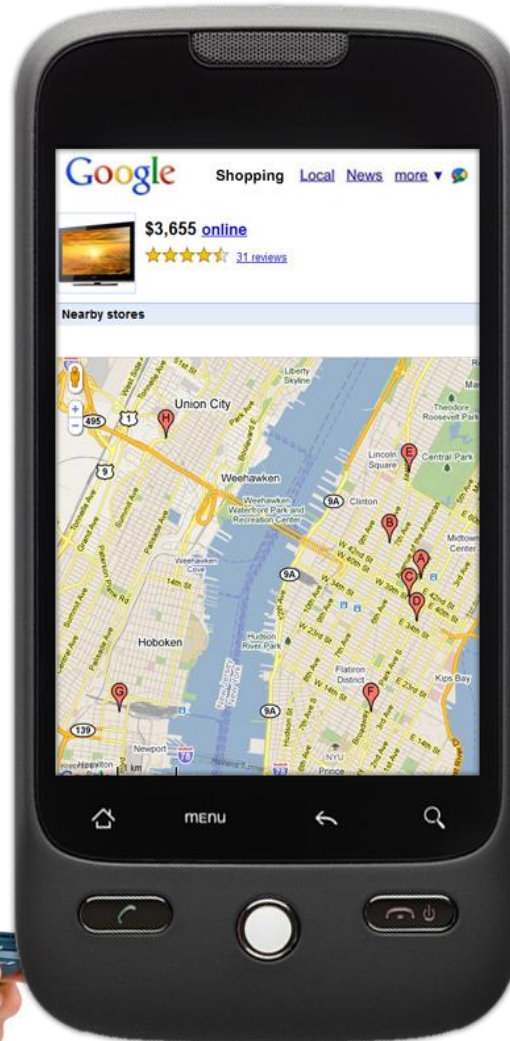
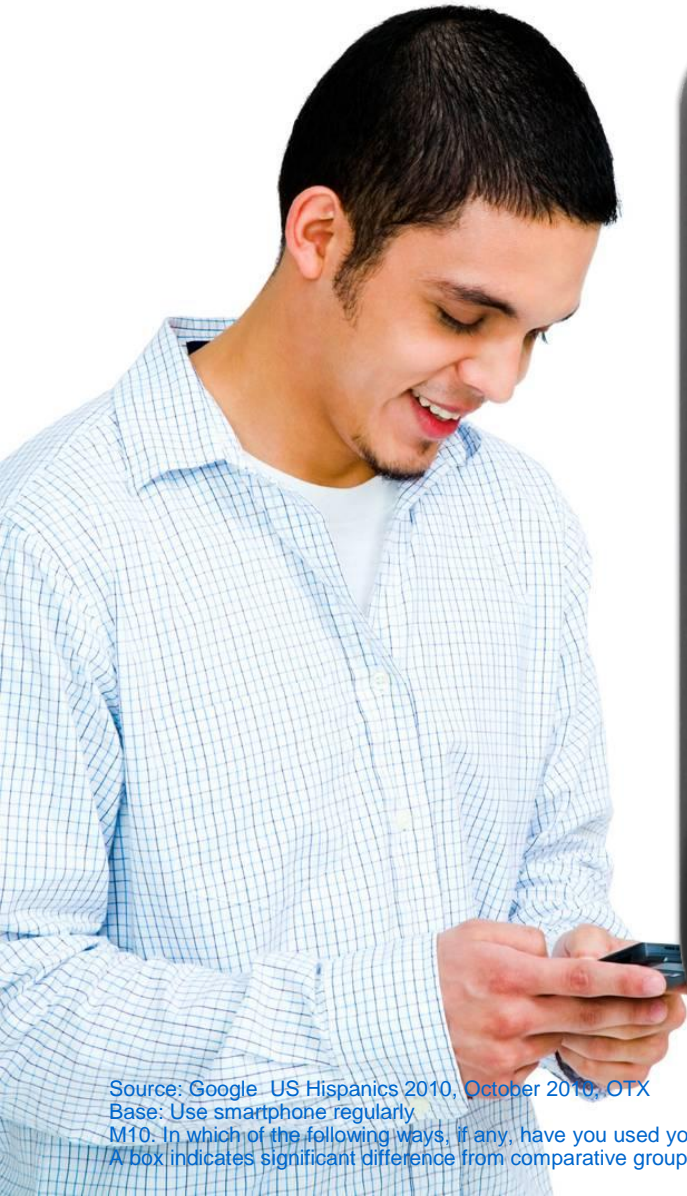


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Source: Google US Hispanics 2010, October 2010, OTX  
Base: Use smartphone regularly  
M4. How often do you use your smartphone to access the Internet?  
A letter indicates significant difference from comparative group(s) at 95% confidence.



# Mobile is Already an Important Component of the Purchase Funnel



## Over 40%

of Hispanics are  
comparing prices and  
locating retailers via  
their smartphones.

Source: Google US Hispanics 2010, October 2010, OTX

Base: Use smartphone regularly

M10: In which of the following ways, if any, have you used your smartphone to do your shopping in the past?

A box indicates significant difference from comparative group(s) at 95% confidence.



Truth #4:

# Online is Hispanics' GPS to the Store





# They Use Search to Shop

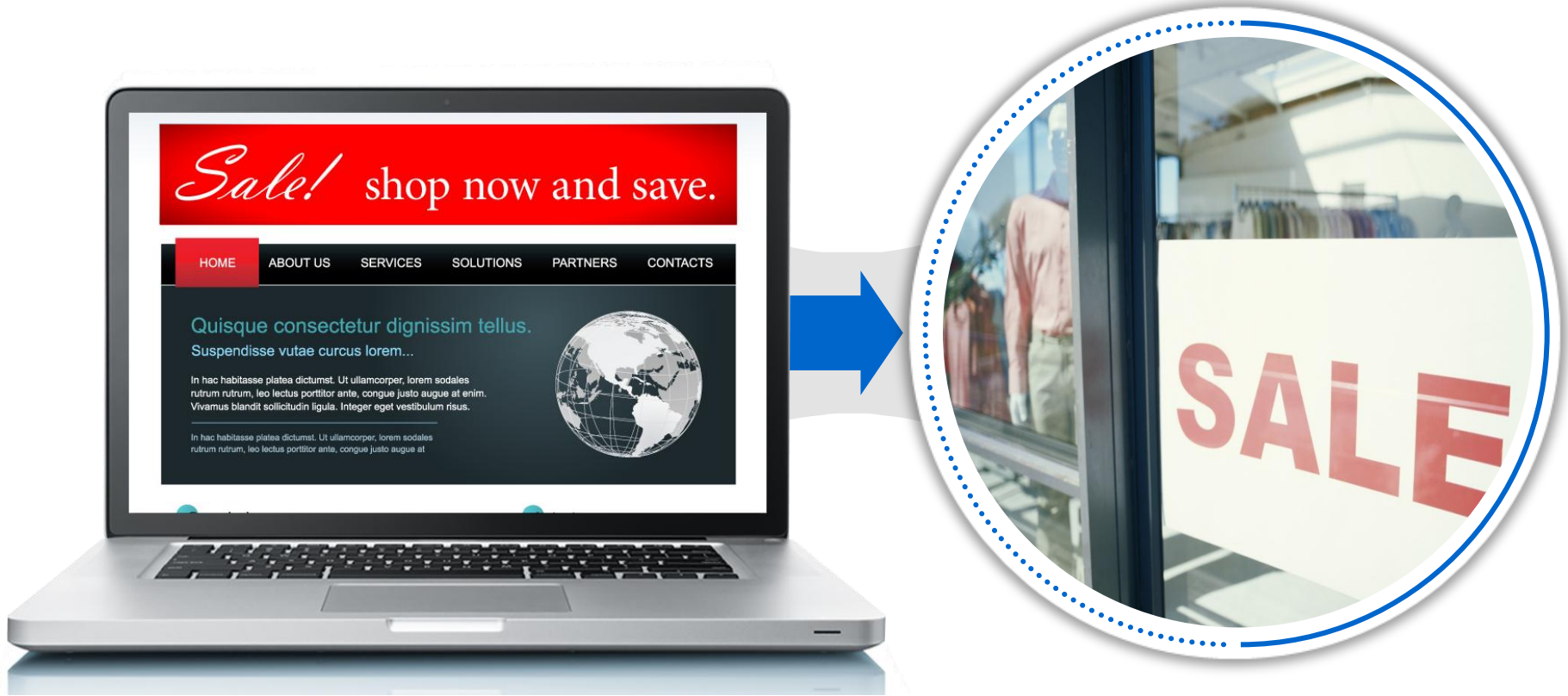
# 53%

of Hispanics use  
Search Engines  
to shop for and  
gather info  
on products.

Source: Google US Hispanics 2010, October 2010, OTX  
Base: Use internet to gather retail-specific info  
C2. Please select all of the online sources you used to shop for and gather  
information on <product>. A box indicates significant difference from  
comparative group(s) at 95% confidence.

# Action Taken as a Result of Online Ads

61% of Hispanics made a purchase in-store as a result of seeing online advertisements while researching products...



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...22% more than the general population

Source: Google US Hispanics 2010, October 2010, OTX

Base: Recall seeing/hearing any ads

C7. And, which of the following actions, if any, have you taken as a result of seeing or hearing any advertisements while gathering information for <product>?

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