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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



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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

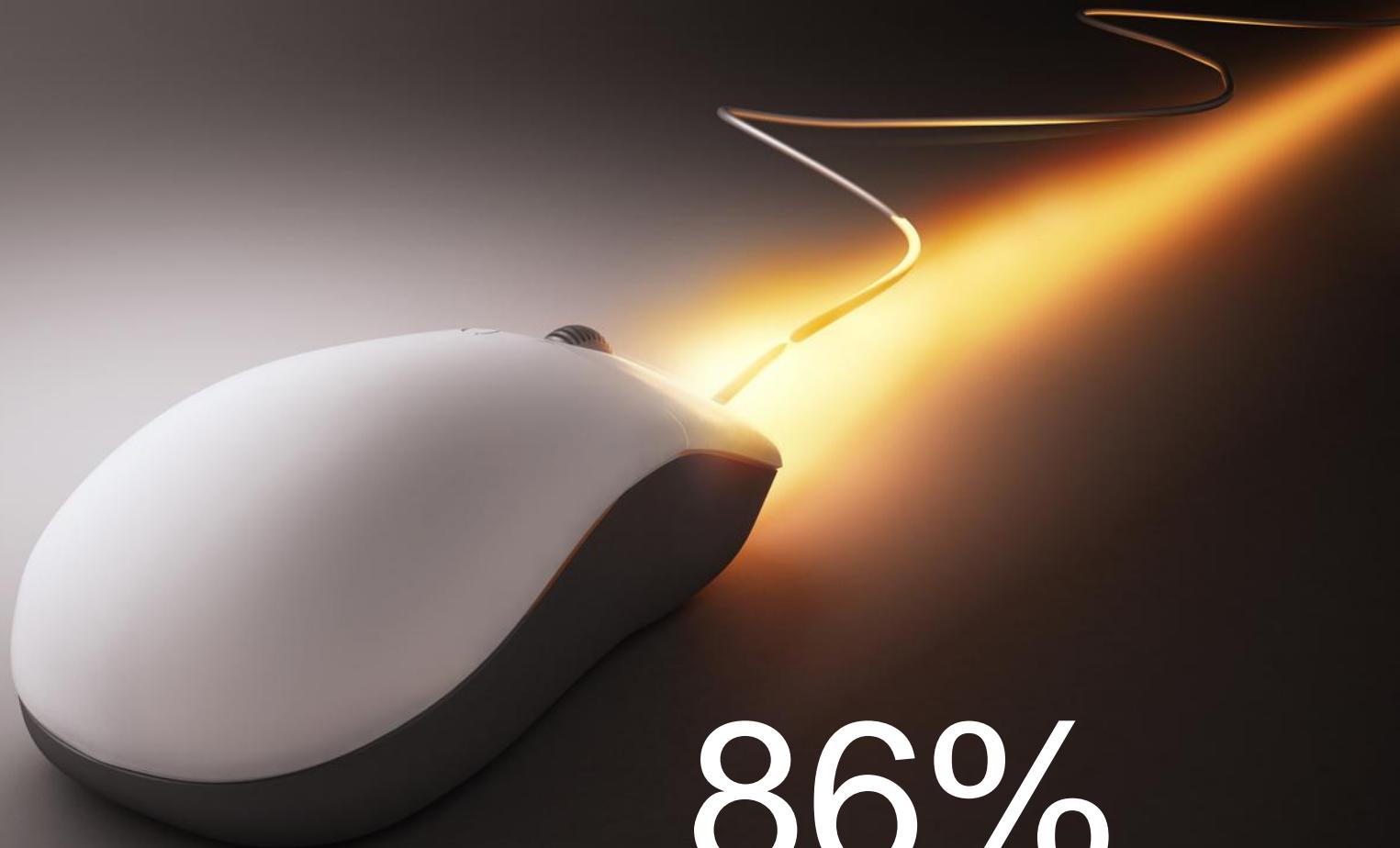


Online advertising drives both in store and online transactions. Think digital first when you define your marketing strategy.

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?

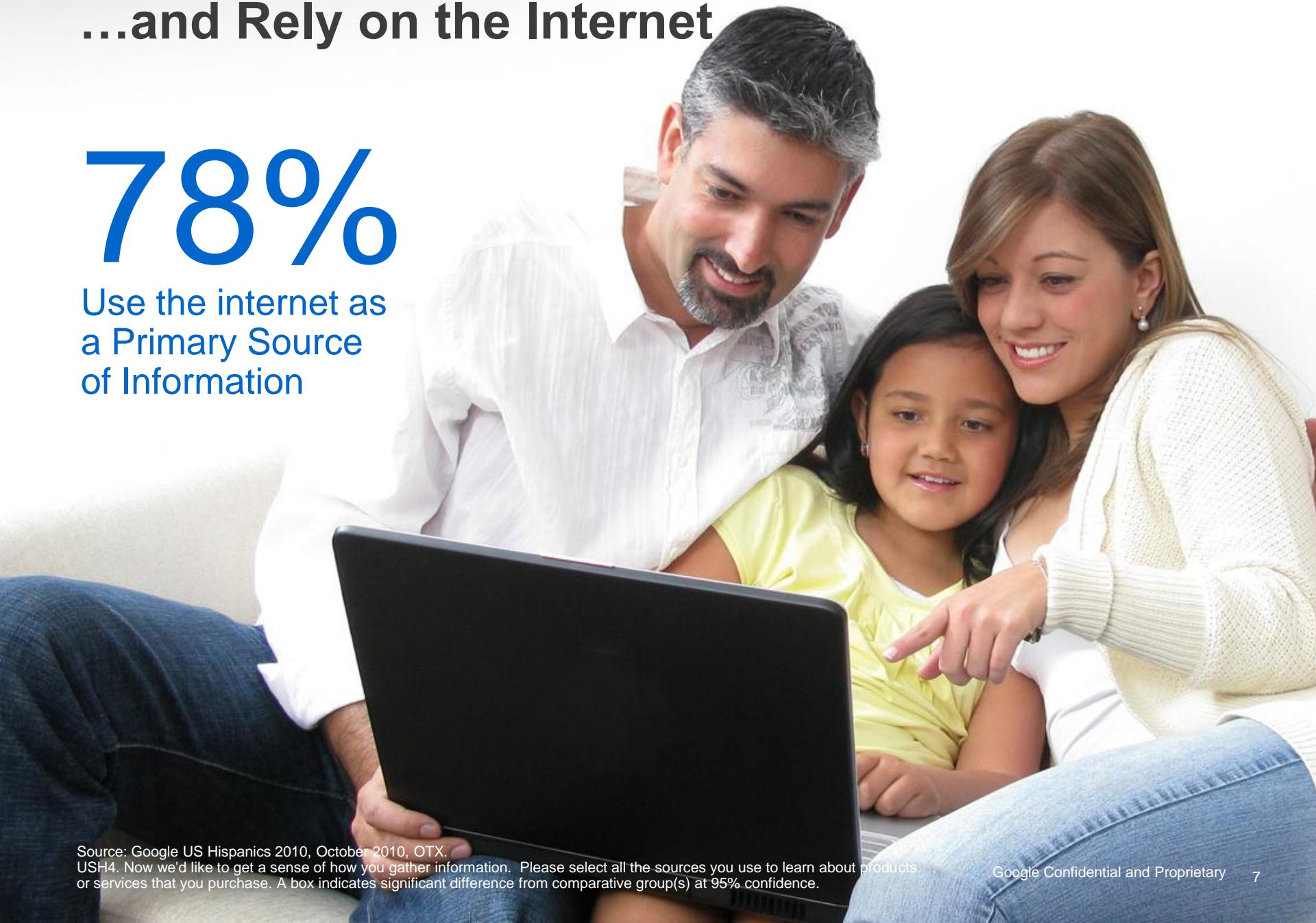
A box (letter) indicates significant difference from comparative group(s) at 95% confidence.

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...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

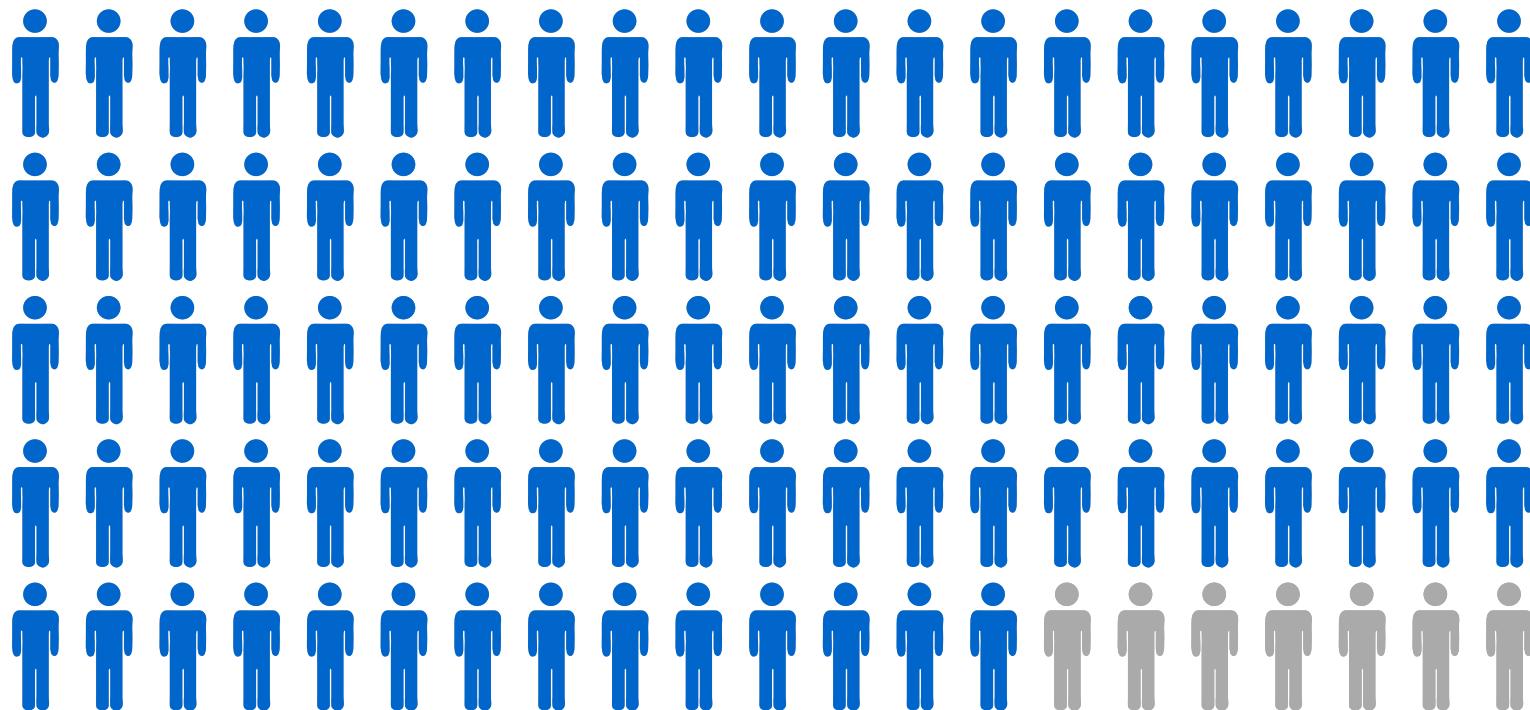
84%

of US Hispanics typically use
Search Engines for Information

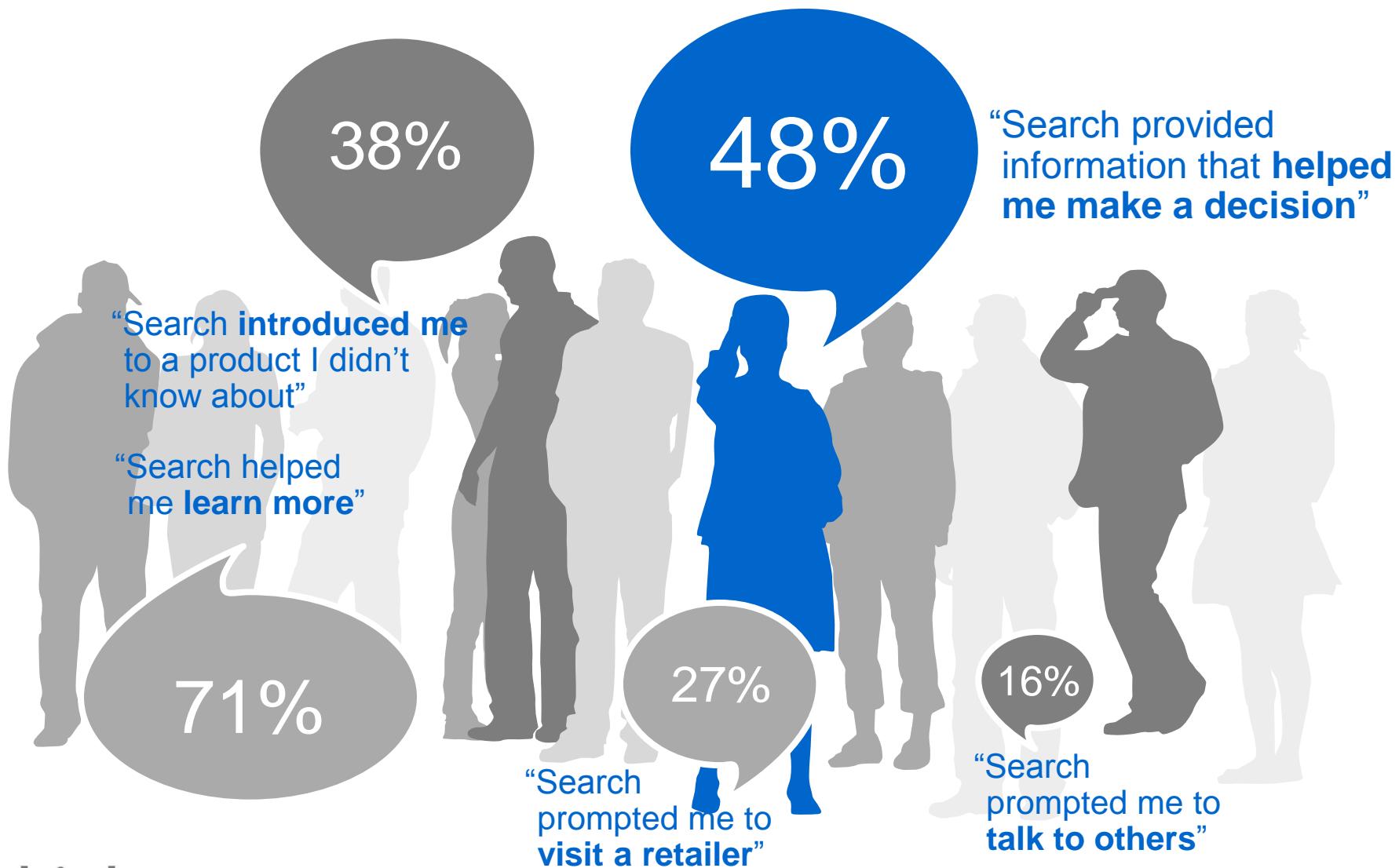


US Hispanics Are Google Users

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



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

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

A woman with long brown hair is smiling and looking down at a white laptop. She is surrounded by several shopping bags of different colors (blue, pink, yellow, green) and patterns. The bags are stacked behind her and to the left, suggesting she is shopping online or using social media for her purchases.

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.

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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

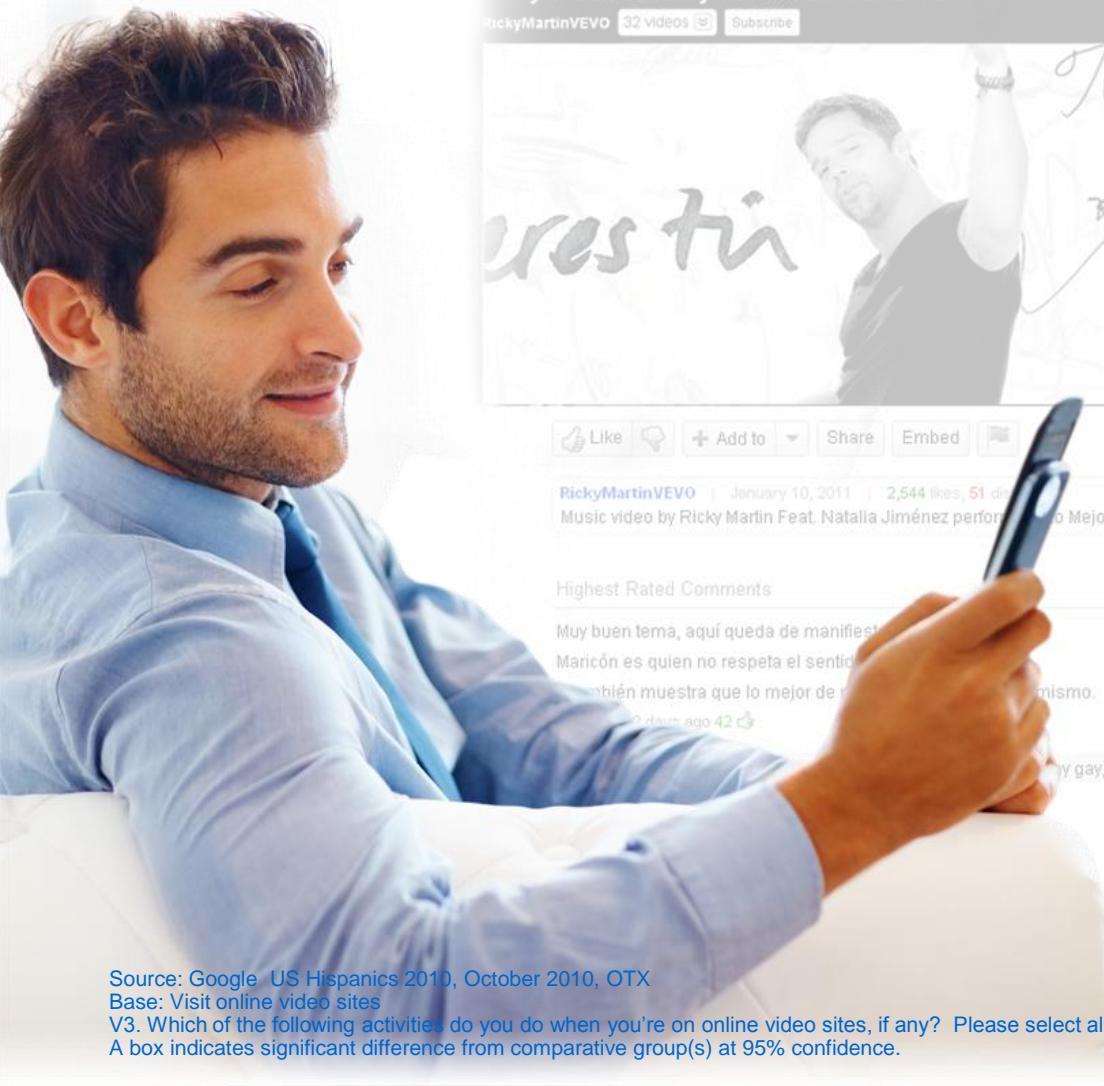
Over 30%

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

393,218

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



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.

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94%
of US Hispanics who watch online
video visit YouTube

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, OT

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.

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)

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.

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.

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Hispanics Maximize Mobile Media



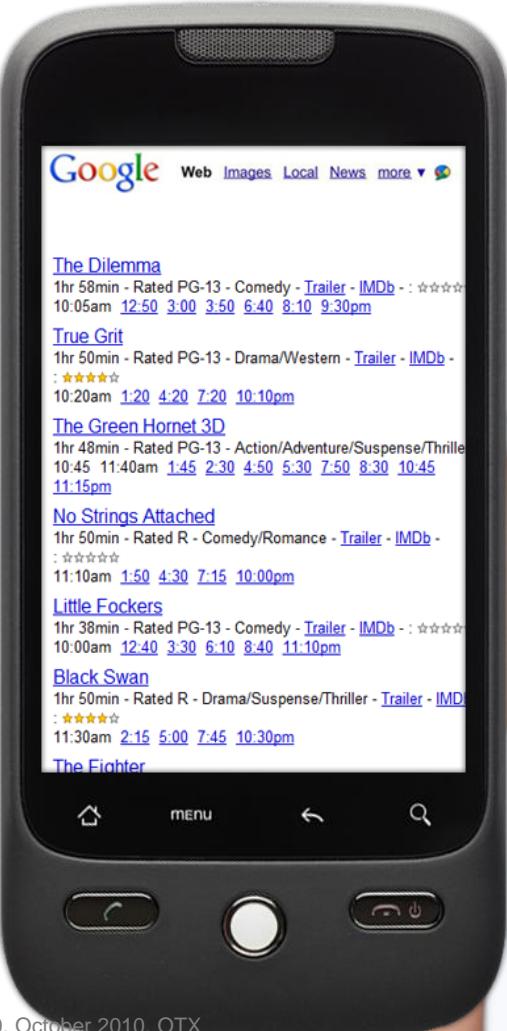
Hispanics are
**significantly
more likely**
to have a smartphone
than the general
population. 45% of
USH vs. 34% of Gen
Pop



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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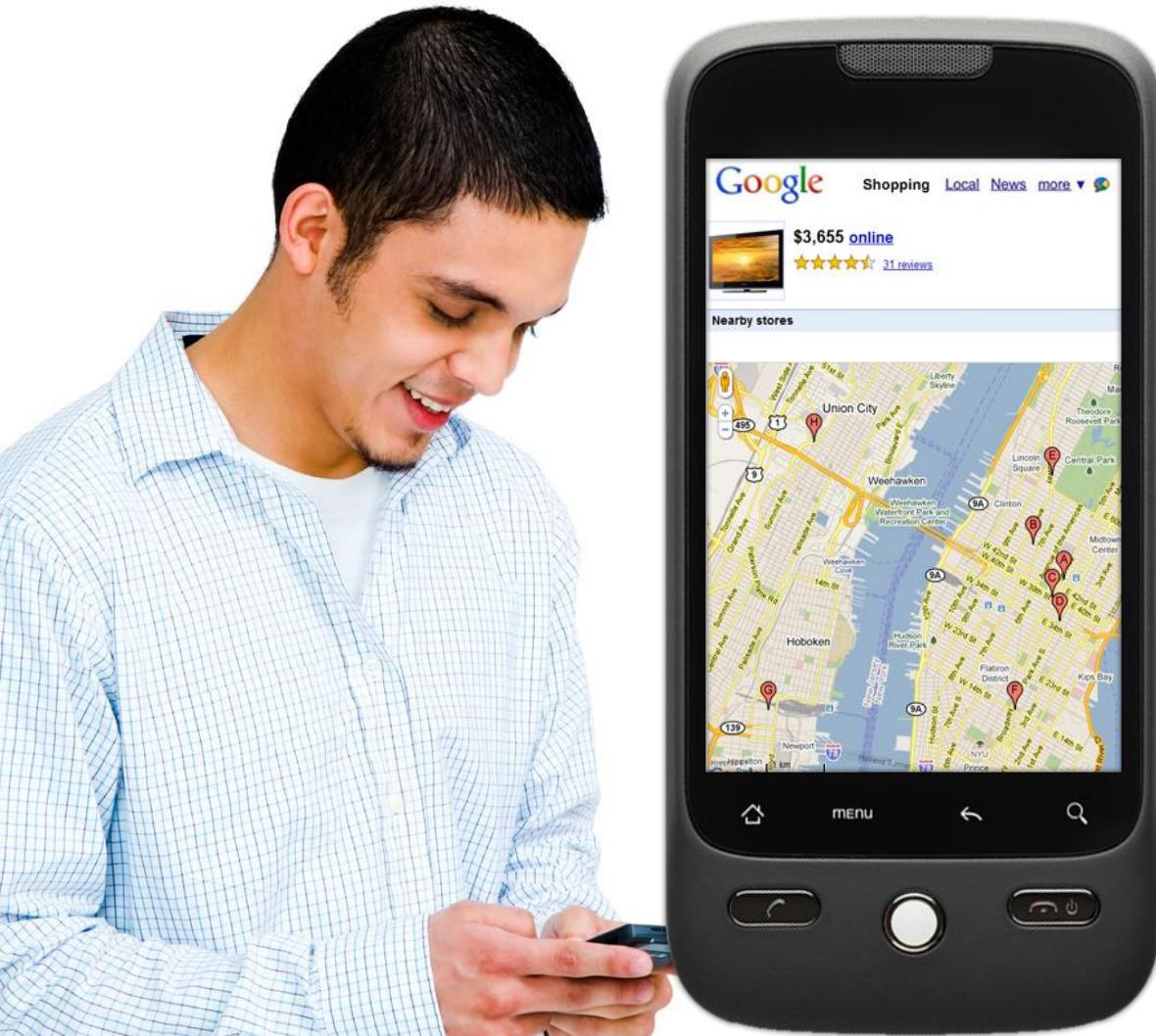
Source: Google US Hispanics 2010, October 2010, OTX

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



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.

Over 40%

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

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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