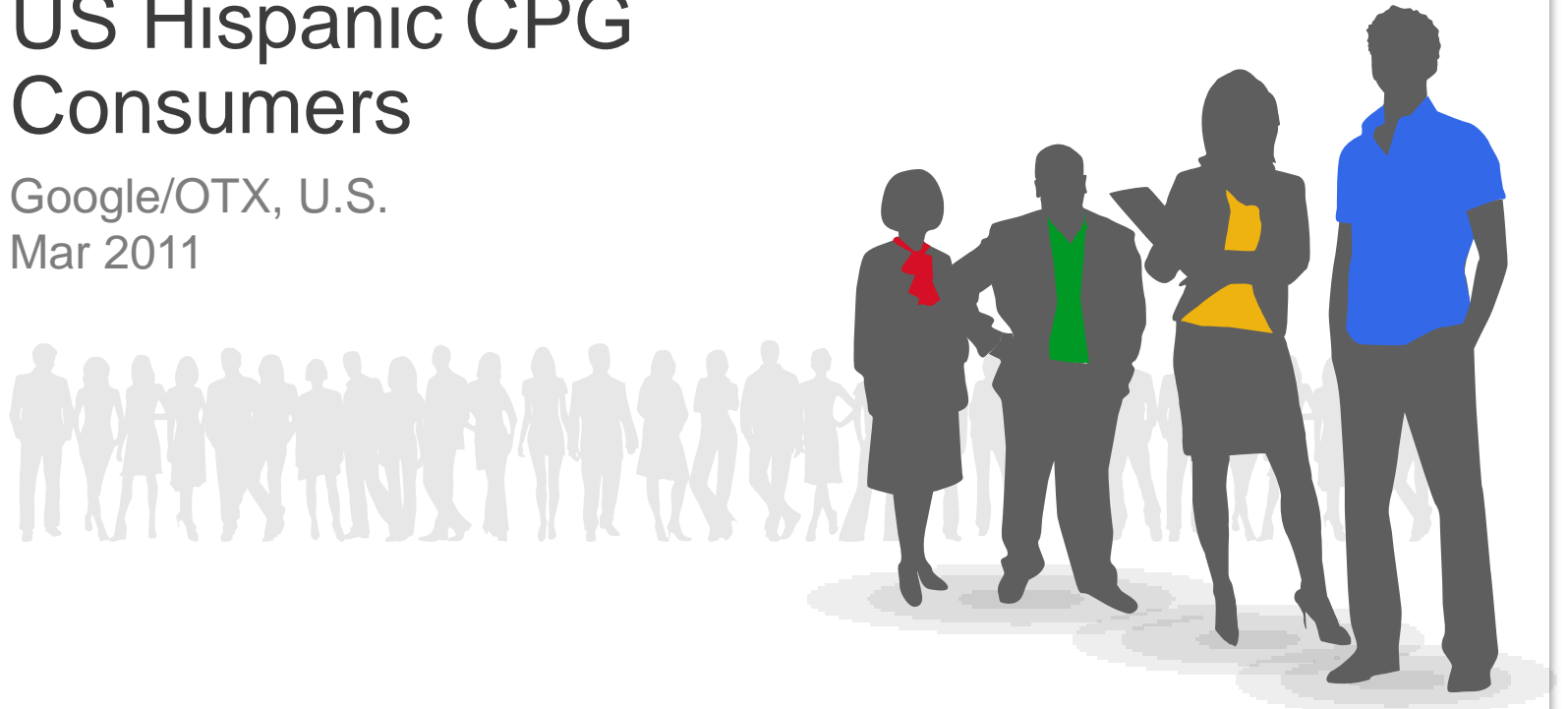


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US Hispanic CPG Consumers

Google/OTX, U.S.
Mar 2011



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.

Groceries Are The Most Popular CPG Products Purchased By Hispanics



90%

Grocery & food items
vs. 96% of gen pop



70%

Household cleaning/
laundry products
vs. 75% of gen pop



67%

Beauty and cosmetic items
vs. 68% of gen pop

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

Base: Total CPG; Hispanic n= 842, Rep n=193

*Randomly Assigned to Category

(QUSH2) Which, if any, of the following items have you purchased in the past 6 months? Please select all that apply.

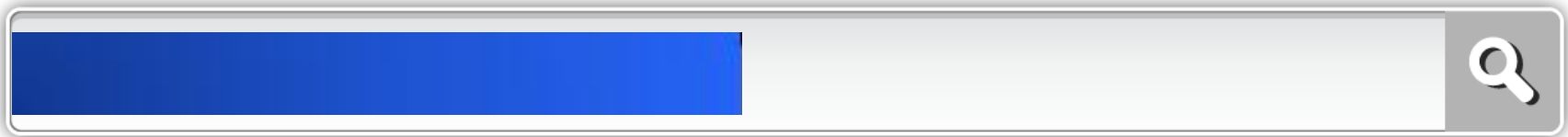
A box indicates significant difference from comparative group(s) at 95% confidence.

Google Confidential and Proprietary

Search Drives Media Usage

49%

of US Hispanics typically use
Search Engines for CPG-related Information



Different Methods of Research and Purchasing CPG Items



Visit the Store and Purchase in the Store



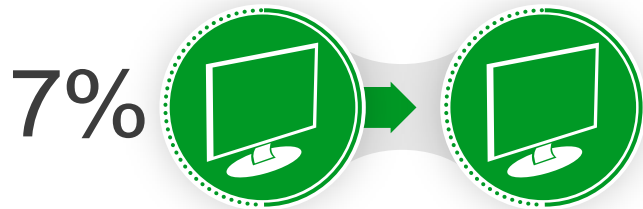
Research Online,
Visit the Store and then Purchase Online



Research Online and Purchase in the Store



Purchase in the store
and then Researched Online Afterward



Research Online and Purchase Online



Visit the store first and then Purchased Online

Action Taken as a Result of Online Ads

As a result of seeing online advertisements while researching products...

54% of Hispanics Shoppers of CPG made a purchase in-store

...25% looked for promotions online

...22% made purchase online

...21% visited a specific brand's website

...20% looked for more info online about a product

Key Takeaways

- Online advertising effectively drives 54% of Hispanic CPG shoppers to purchase in-store.
- Online research is a key influencer for CPG with over 32% of the audience researching online before purchasing online or at the store.
- Almost 50% of US Hispanics use Search to for CPG-related info

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