

# Digital Trends in the Hispanic Marketplace



March 19, 2008



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# Agenda

- Economic Impact Overview on Hispanics
  - *Hispanics are more confident about the economy than the general market, and in turn they are more likely to purchase big ticket items*
- Importance of Media Engagement
  - *Hispanics have a unique and personal relationship with media, and online and print deliver an engaging audience amongst Hispanics*
- The Multi-tasking Hispanic consumer
  - *Hispanics use media simultaneously and print and online deliver a winning combination*
- Online usage trends
  - *Hispanics search for product information online and even though they look for a variety of content online, they have a high affinity to entertainment content*
- Marketing Implications

# BIGresearch | overview

- Nationally known and recognized Subject Matter Expert on consumer behavior & buying patterns
- Proprietary databases of consumer shopping behavior, media behavior & purchase intentions:
  - **Consumer Intentions & Actions Survey (CIA)**
    - Purchase behavior & economic attitudes
    - Over 7,000 U.S. consumers each month since 2001
  - **Simultaneous Media Usage Survey (SIMM)**
    - Media influence & use from a consumer centric viewpoint
    - Over 15,000 consumers bi-annually since 2002
- Official data source for the **National Retail Federation**
- BIGresearch specializes in providing a ***'forward look'*** at the evolving consumer

# BIGresearch | SIMM

We talk with over 15,000 **consumers** bi-annually

- Media Use
- Media Influence

In 2002, we started the industry discussion on the simultaneous media reality:

- Ad Age
- ARF
- ESOMAR
- Journal of Consumer Behaviour
- Journal of Advertising Research

Surveys are conducted via email

- SIMM 10 – July 2007
- N = 15,439 including 2,141 Hispanic consumers
- Questionnaire in English & Spanish



# Economic Impact Overview



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## Despite economic uncertainties, Hispanics still remain an important and active consumer for advertisers

How do you feel about the following statement? "My philosophy of spending is 'Live for today because tomorrow is so uncertain.'"

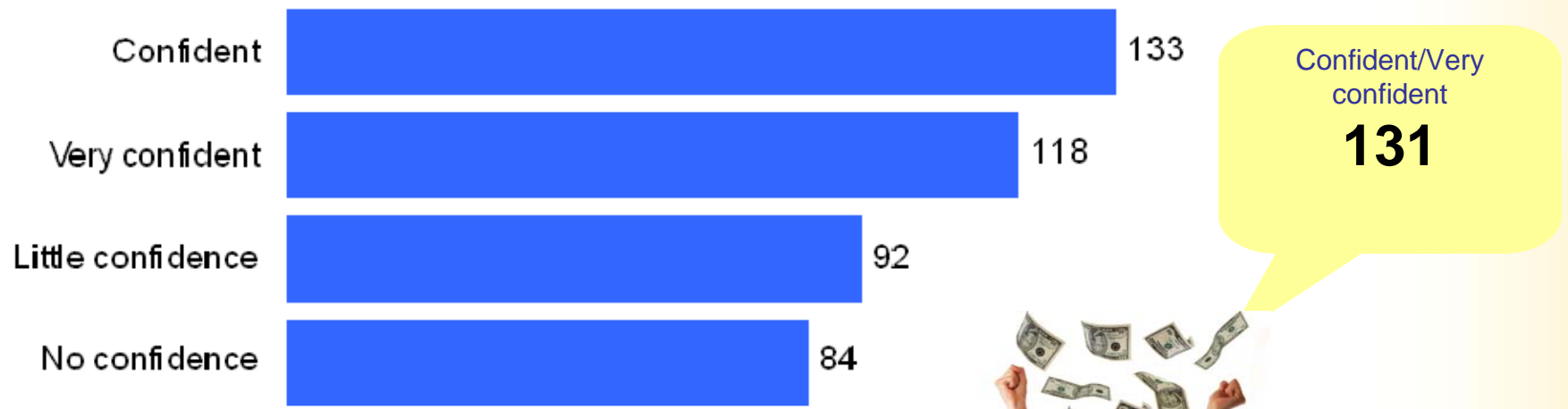
	Hispanic	Adults 18+	Index
Strongly Agree	10.8%	7.7%	141
Agree	27.8%	22.9%	121
Uncertain	21.4%	20.9%	102
Disagree	27.5%	32.4%	85
Strongly Disagree	12.6%	16.1%	78
<b>Agree/Strongly Agree</b>	<b>38.5%</b>	<b>30.6%</b>	<b>126</b>

**More Hispanics live in the present - they are less worried about the future and more likely to spend without worrying!**

Source: BIGresearch, CIA, March 08

# Hispanics are also more confident about the economy than the general market

Which one of the following best describes your feelings about chances for a strong economy during the next 6 months?  
Hispanic Index against adults 18+



Source: BIGresearch, CIA, March 08

....and as a result are more willing to spend!

Do you plan to make any of the following major (big dollar) purchases within the next 6 months?  
(Check all that apply) Hispanic Index against adults 18+



	Index
House	242
Stereo Equipment	225
Digital Camera	214
Jewelry/Watch	198
Furniture	186
TV	160
DVD/VCR	158
Home Appliances	156
Computer	152
Vacation Travel	126
Major Home Improvement or Repair	123

**Hispanics are more likely to purchase electronics and other big ticket items in the next 6 months!**

Source: BIGresearch, CIA, March 08

# Online is becoming more of a resource for Hispanics due to changes in the economy

As a result of fluctuating gas prices, are you doing any of the following? (Check all that apply)

	Hispanic	Adults 18+	Index
Doing more comparative shopping online	28.4%	21.8%	130
Shopping more online	17.2%	15.1%	114



Source: BIGresearch, CIA, March 08

# Importance of Media Engagement



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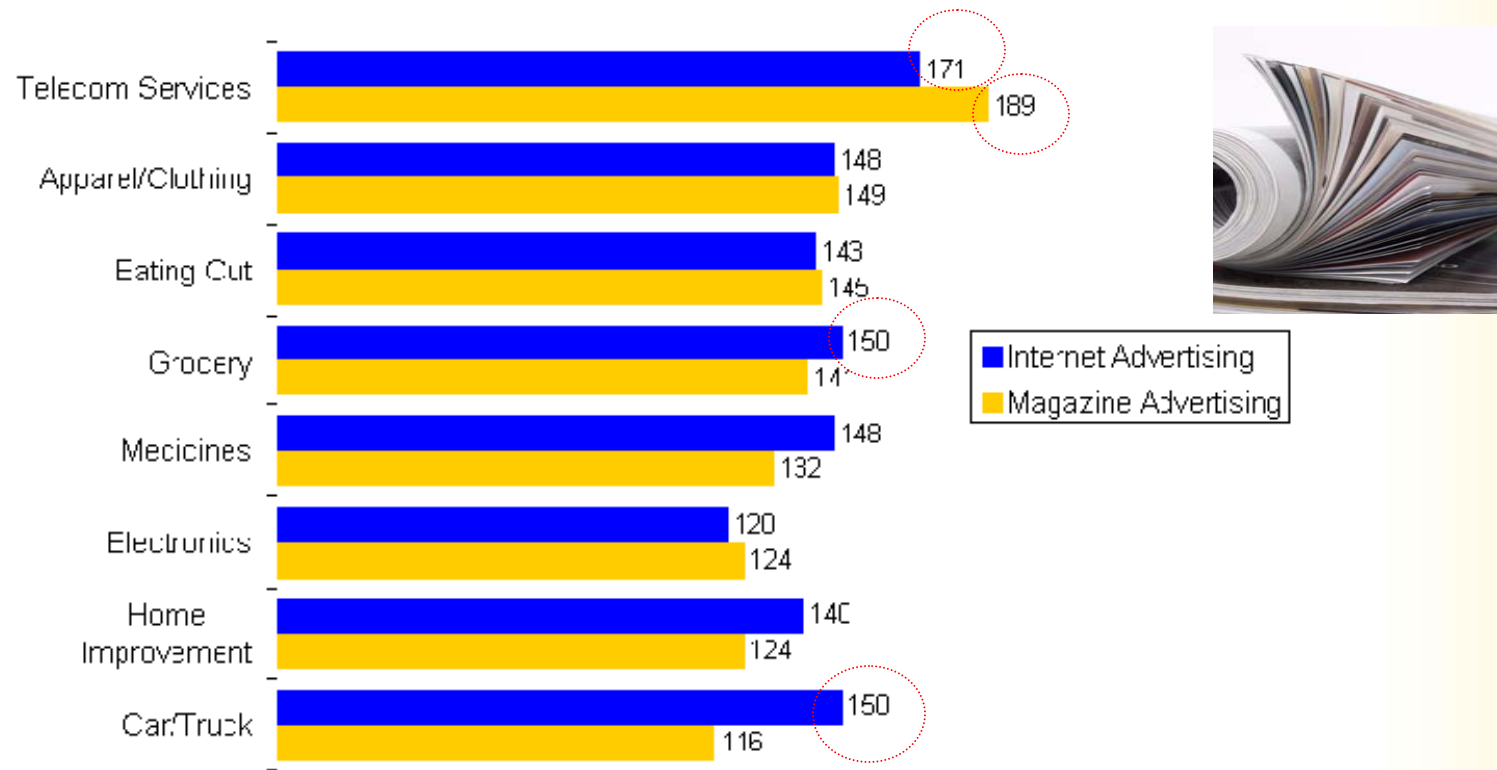


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Hispanics have a unique and personal relationship with media- this is highlighted by their engagement towards online and print

Hispanics are influenced by magazine advertising and internet advertising more than general market when making purchasing decisions across a variety of categories

Magazine advertising and internet advertising in influencing purchase across the following retail categories-Index

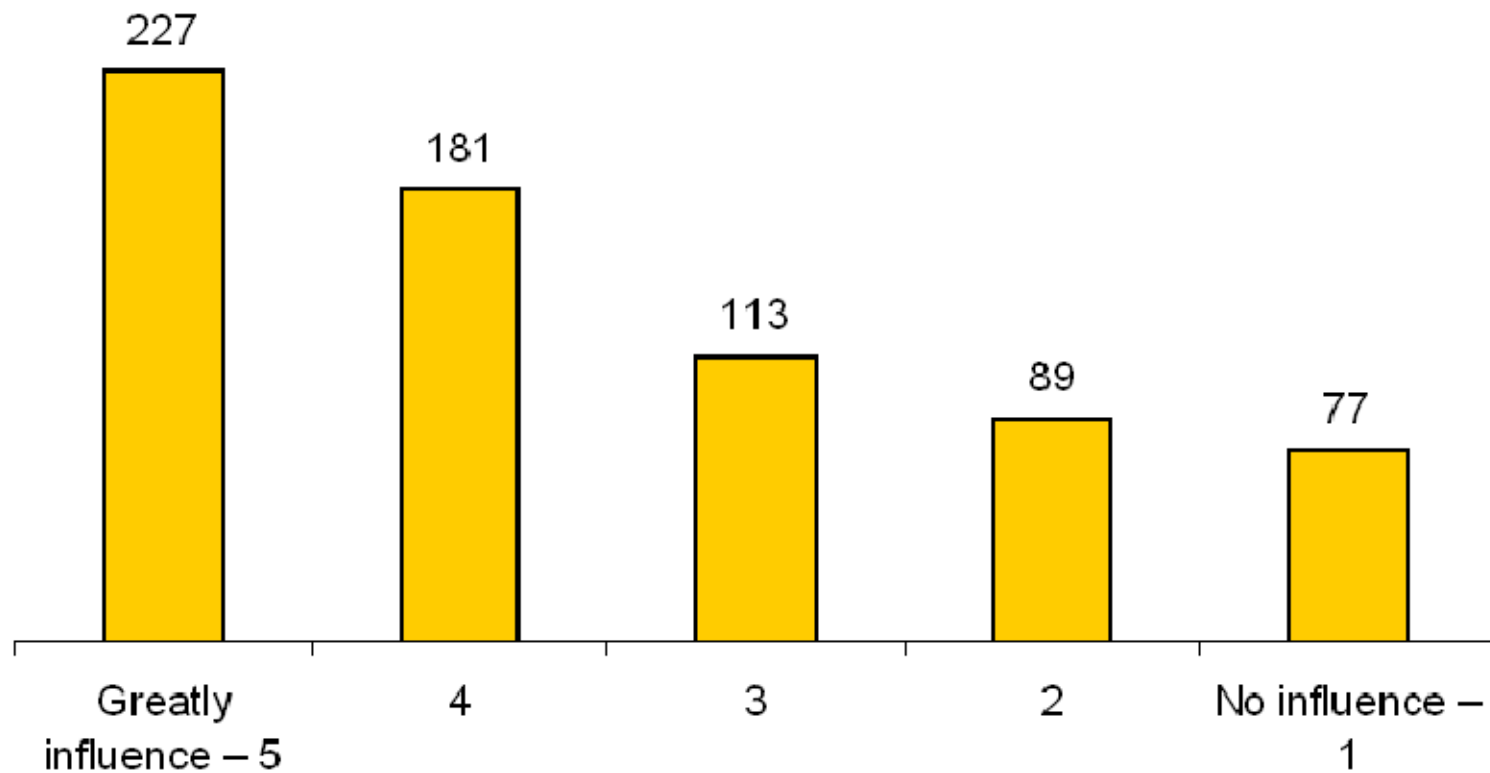


Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# An important audience for advertisers

Hispanics are more than **twice as likely** as the general market to be greatly influenced by sponsored links online to make purchasing decisions

When searching for products/services on the Internet, how do "sponsored links/results" influence your purchases?-Index Adults 18+



Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# The Multi-Tasking Hispanic Consumer



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Hispanics consume media simultaneously and when they do so they are more likely than the general market to pay attention to each media equally!

When you use media simultaneously, do you pay attention... (Choose only one)-Index Adults 18+

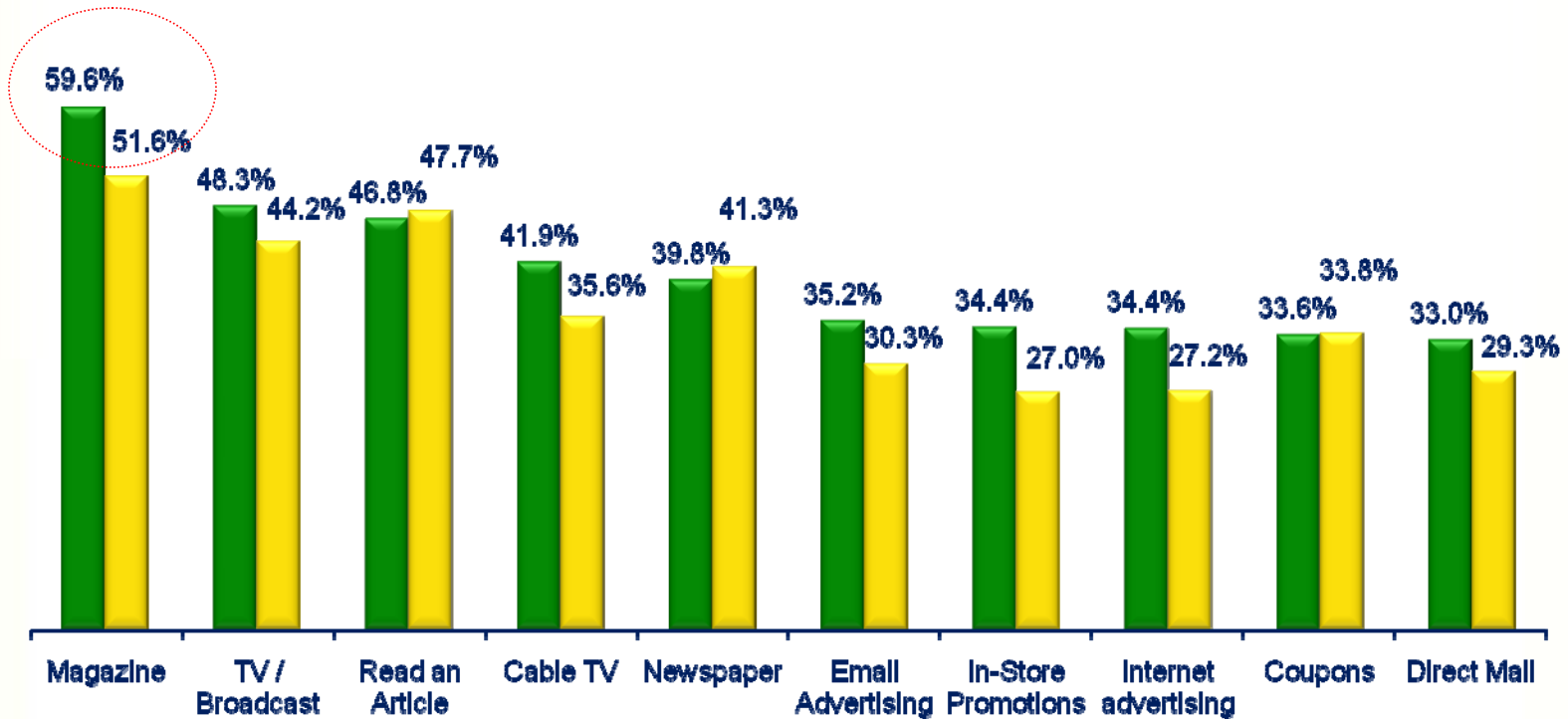


Equally to each media	<b>109</b>
To one media more than other	<b>98</b>
Don't simultaneously use media	<b>91</b>

Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# Magazines are the #1 media to drive web visits and searches among US Hispanics

Which of the following triggers you to start an online search?



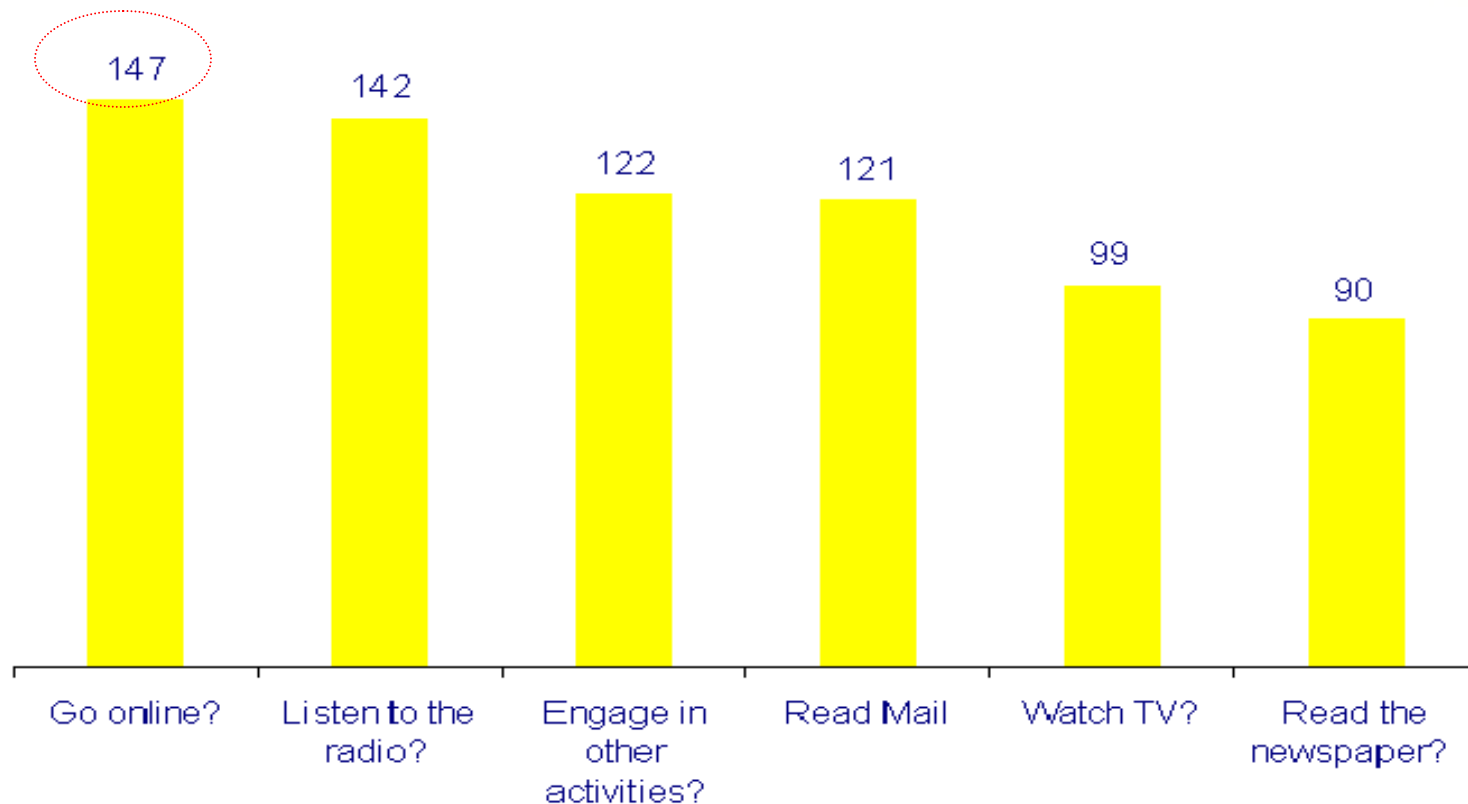
Hispanics  
General Market

Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# ..resulting in print and online deliver a winning combination!

Hispanics are more likely than the general market to be reading magazines and online at the same time!

When you read magazines, do you simultaneously... Index Adults 18+



Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# Online Usage Trends

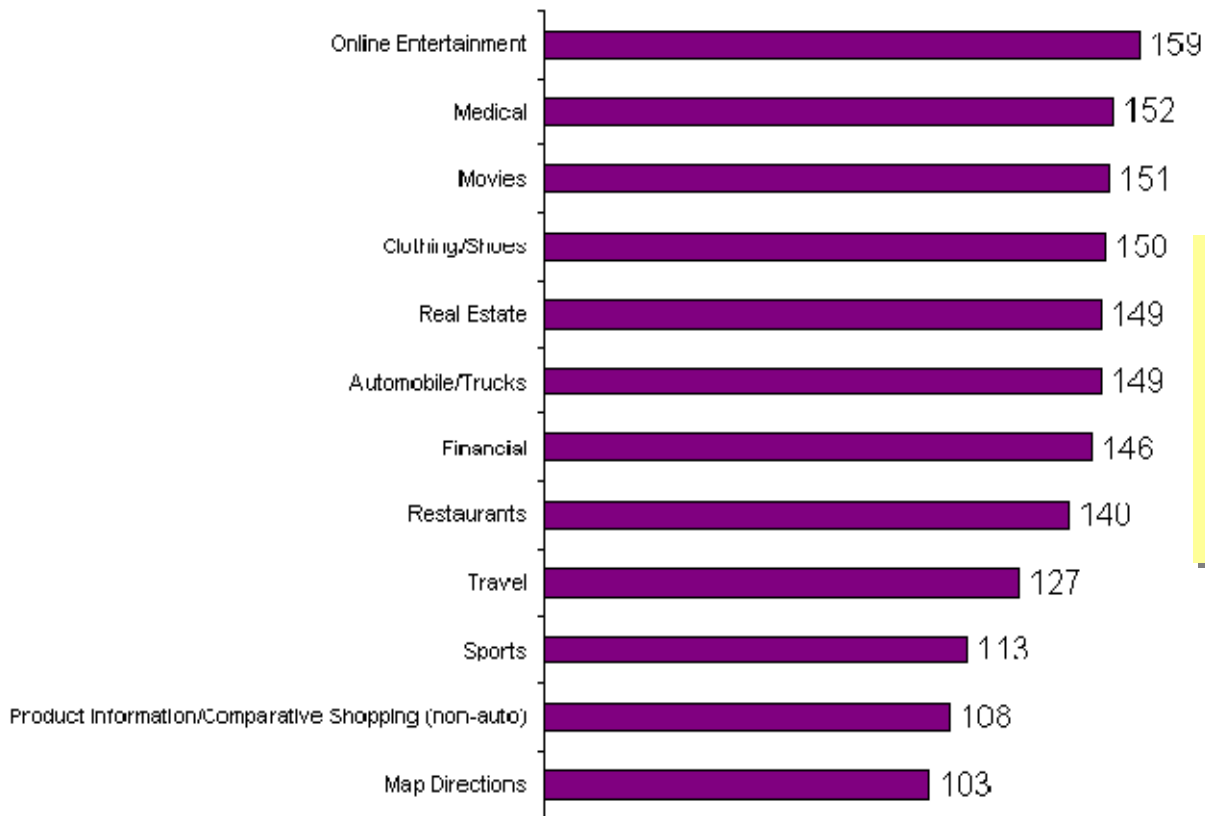


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# An opportunity: Hispanics are hungry for online content as they have a higher affinity than the general market in searching for information online regularly on the following categories

Please tell us how often you search online for the following: (Regularly means routinely, as a set pattern):Index



Online entertainment, medical information, movies, and clothing/shoes are the categories that Hispanics over-index when it comes to searching online!

Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# Hispanics are more likely to research online before making purchases

How often do you research products online before purchasing them in person or in a store?



**Regularly**

Hispanics

**48.6%**

Adults 18+

**43.4%**

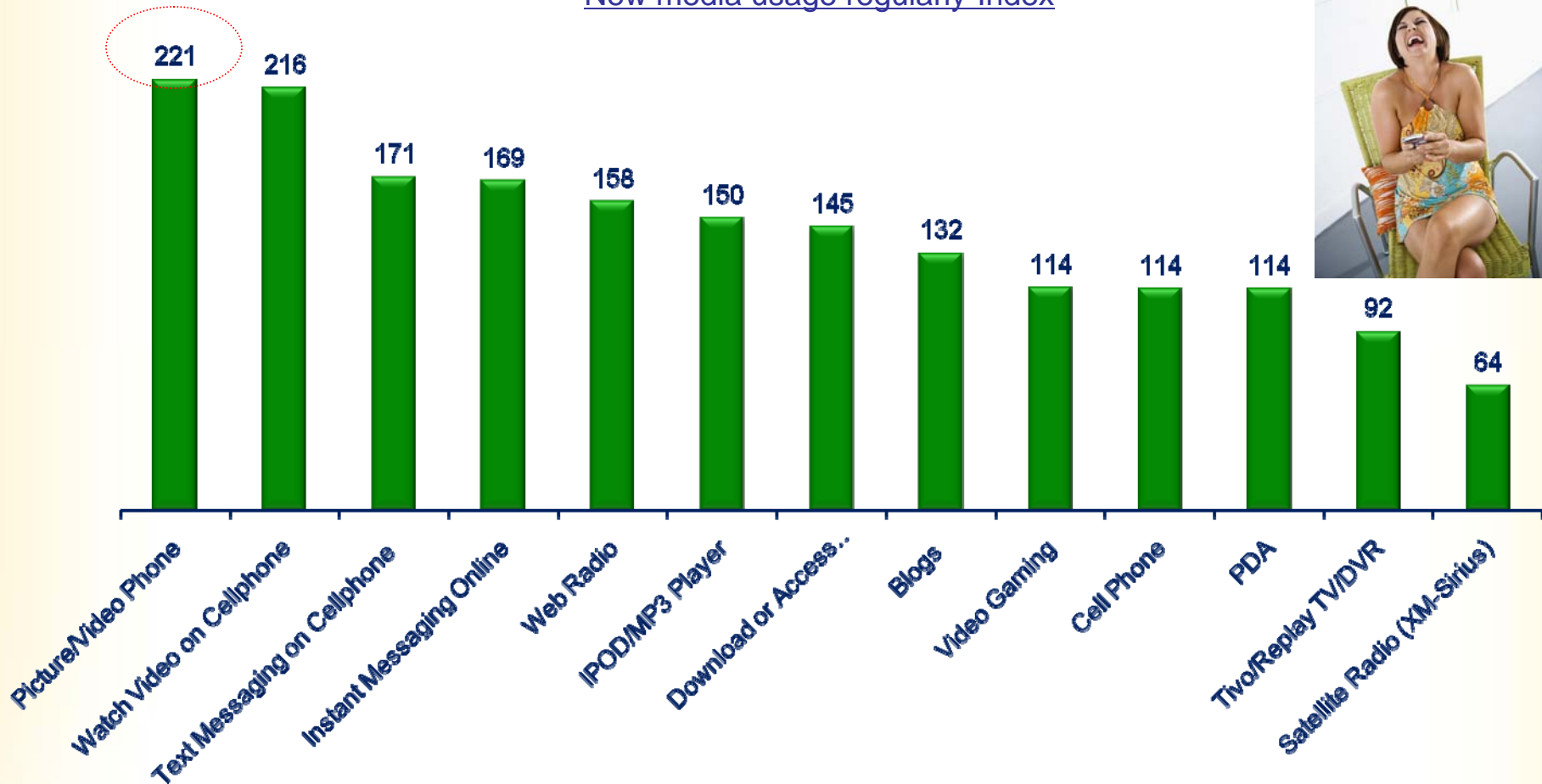
Index

**112**

Source: BIGresearch, CIA, March 08

# Hispanics are early adopters as they over-index against the general market when using new media

New media usage regularly-Index



Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# Hispanics over- index when it comes to consuming online activities

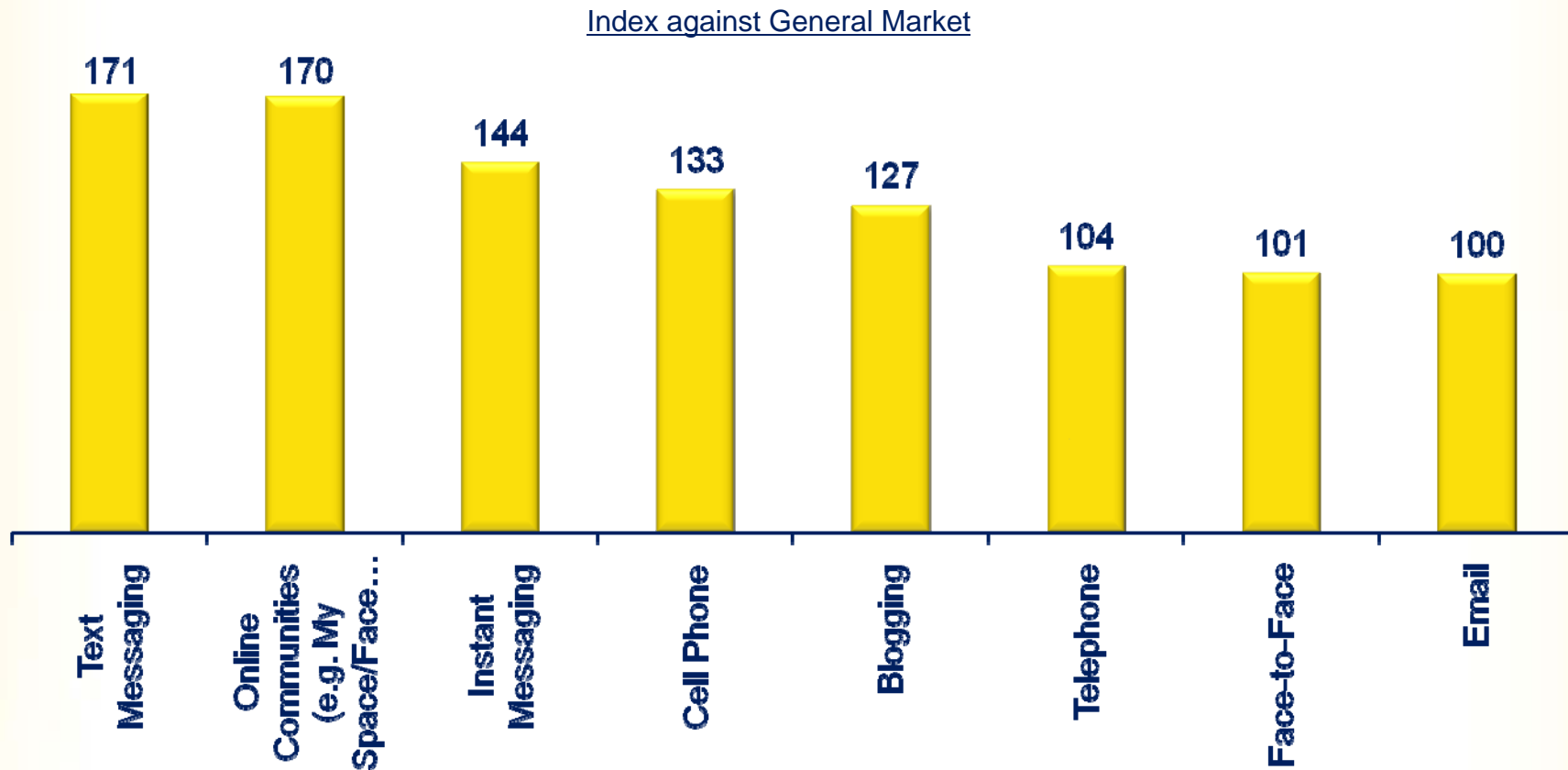
## When it comes to traditional media, they have a higher affinity to consuming magazines over any other traditional media

Media consumption habits on a weekly basis- On an average- On an average WEEKDAY (MONDAY-FRIDAY), do you? Index Adults 18+



Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# Hispanics spread word-of-mouth about a product/service via non-traditional media more so than general market



Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# Electronics and Apparel are the top products Hispanics have searched for online over the last 90 days before buying them

Over the last 90 days, which types of products did you research online before buying them in person? (Check all that apply)

Categories	Hispanics	Index to general market
Electronics	52.3%	105
Apparel	43.2%	137
Shoes	31.4%	136
Appliances	30.7%	118
Beauty Care/Cosmetics	30.6%	157
Medicines/Vitamins/Supplements	21.1%	102
Home Decor	21.0%	128
Home Improvement Items	20.6%	82
Furniture	17.9%	126
Jewelry/Watches	17.5%	141
Car/Truck	16.6%	115
Food/Groceries	16.3%	91
Sporting Goods	14.7%	105
Tires/Batteries/Auto Parts	13.0%	98
House/Land	9.4%	155
Other:	5.6%	77

Source: BIGresearch SIMM Data, July 07 N = 15,439 including 2,141 Hispanic consumers

# An entertainment driven online audience!

Hispanics are doing a variety of things when they are online

Which of the following online activities do you REGULARLY do for Fun & Entertainment while online? (Check all that apply)

Categories	Hispanics	Index to general market
Shopping	46.4%	108
Movie News	45.3%	132
Music News	36.6%	155
TV News	36.6%	119
View Photos from Friends	36.4%	124
Celebrity Gossip	34.9%	193
IM/Chat	33.8%	144
Video Games	29.5%	101
Horoscopes/Astrology	28.6%	174
Visit Video Sharing Sites	23.8%	158
Sports News & Scores	22.6%	95
Research/Get Ideas for Hobbies	21.9%	93
Online Auctions	17.9%	85
Locate Old Friends/Classmates	16.7%	134
Share Stories with Friends	16.4%	108
Watch TV Reruns	15.4%	144
Stock Market/Business News	10.2%	76
Get Advice from Friends	9.3%	130
Genealogy Research	7.1%	88
Online Dating	6.9%	149
Fantasy Sports	6.7%	99
Gambling	6.3%	99
Virtual World (e.g. 2nd Life, The Hills, etc.)	4.6%	189

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# Marketing Implications

- Be Aware of Market Forces...  
*...seize opportunities*
- Understand Hispanic Media Engagement...  
*... be relevant with content & context that fits the community*
- Multi-tasking Hispanic consumers want to **control** their life & their time...  
*... provide information that helps them manage their life*
- **Integrate** Digital & Print marketing initiatives...  
*... maximize impact*

Thank you!



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