



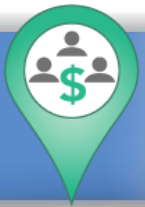
# Hispanic Consumers Buy Into Digital for Local Shopping

Findings from BIA/Kelsey's Consumer Commerce Monitor™ (CCM)

February 27, 2014



# Overview and Speakers



- Findings from BIA/Kelsey's Consumer Commerce Monitor™ (CCM) Study
- Samples used for Hispanic/non-Hispanic comparisons
- Local buying activity
- Devices used for local buying
- Use of social networks for local buying
- Conclusions



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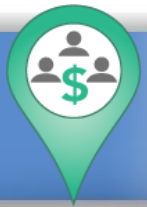


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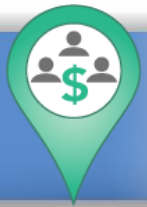
# BIA/Kelsey At the Center of Local



- BIA/Kelsey is the leading research and advisory company focused on the local advertising marketplace.
- Our goal is to help companies leverage the exceptional business opportunities in local media to solidify their leadership position.
- Our research-driven data helps our clients make the right decisions, every day:
  - Industry Forecasts
  - Local Market Ad Reports
  - Advertiser Research
  - Consumer Research



# About Consumer Commerce Monitor™

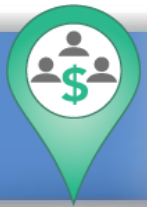


- Consumer Commerce Monitor™ (CCM) is BIA/Kelsey's online study of consumers about media usage, performance assessments, and the use of mobile, social and loyalty programs for local shopping.
- Data is fresh: Q3/2013
- Full sample: 2,000 respondents; highly representative of U.S. adult population.
- The sample is drawn from several seasoned, online consumer panels, and is diversified and balanced by key demographic variables, including age, geography, income, etc., to reflect the U.S. adult population.
- Results are weighted to reflect the overall U.S. population of those 18 years and over.



Survey details in Appendix. Results based on 2,000 responses have a confidence interval of +/- 2.2% at the 95% confidence level. The confidence interval is larger for those questions that were asked of just a subset of the full sample.

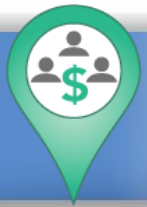
# What Do We Mean By “Local Shopping”?



- Local shopping is defined as shopping within a 25-mile radius of the respondent's primary residence.
- This includes shopping at national companies with local stores or franchises (i.e., Home Depot, CarMax, UPS Store, Walgreen's, etc.)
- In this material, we're talking about any stage of the purchase funnel, from awareness and research, through transacting.

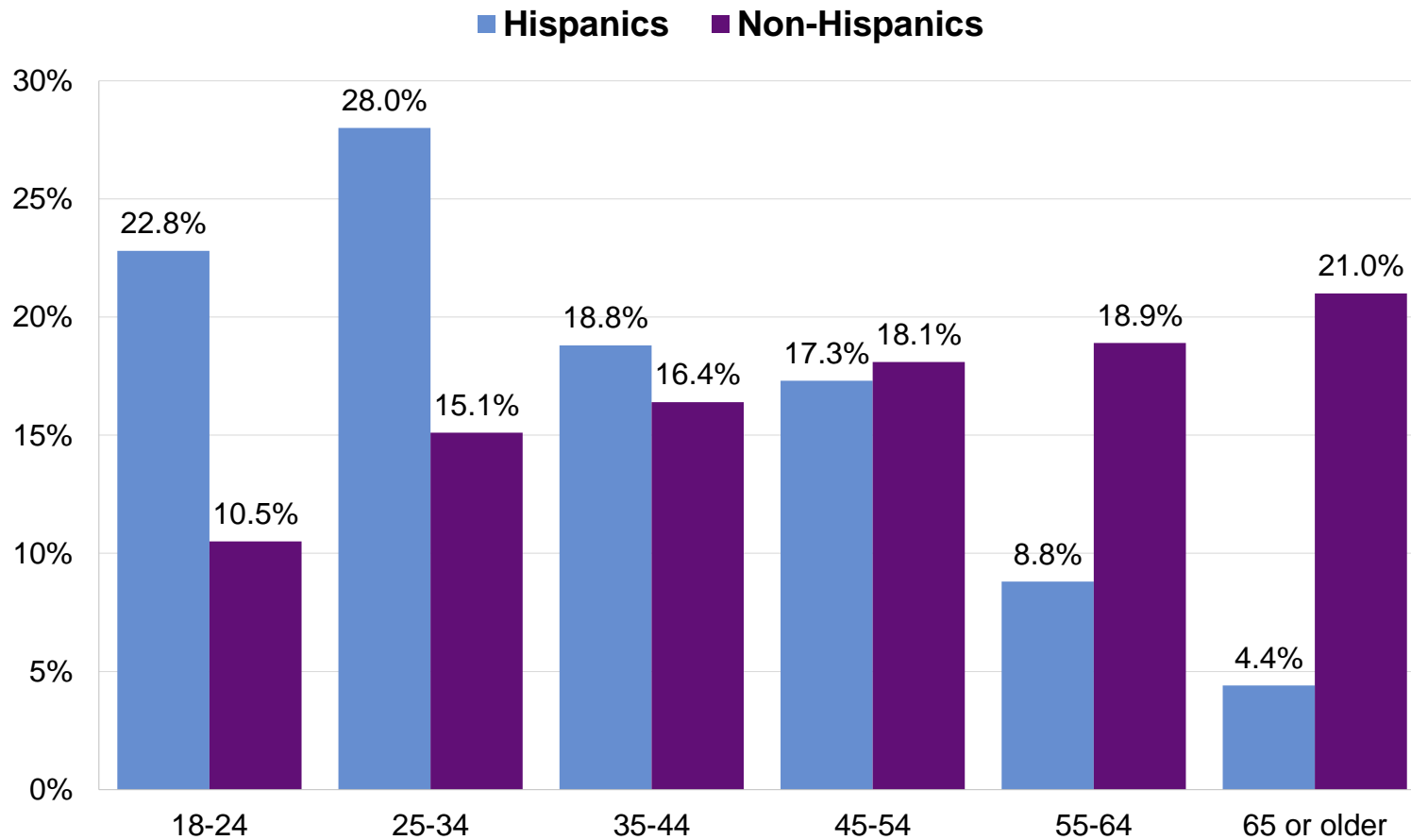
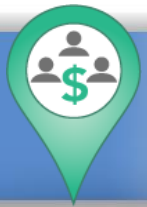


# Key Characteristics of the Hispanic CCM Study

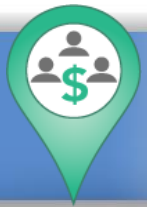


- Sample is
  - Drawn from the overall CCM sample
  - Diversified geographically
  - Representative of demographic variables, including age, income, etc., to reflect the U.S. Hispanic population.
- Note that the Hispanic and non-Hispanic samples are further narrowed to household income below \$100,000. These slightly modified samples allow us to best reflect the U.S. Hispanic households, as 95% of the Hispanic population resides in such households.
- Resulting Hispanic sample is skewed to a younger age distribution than the non-Hispanic sample, mirroring the overall younger distribution of Hispanic households in the U.S.

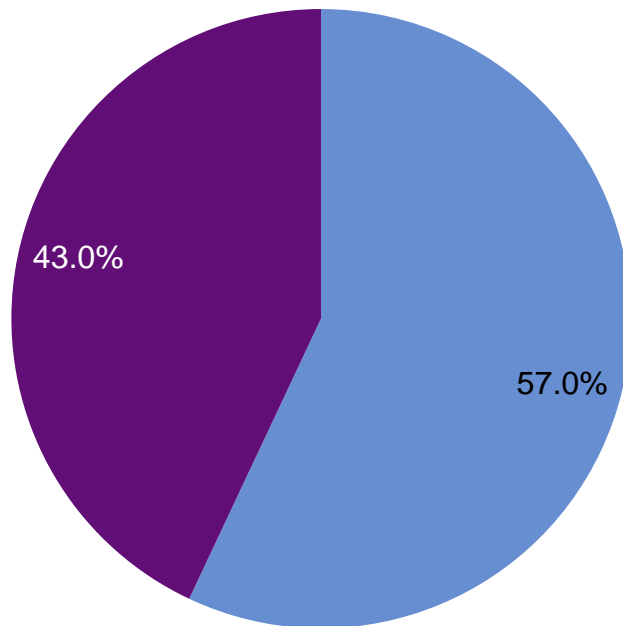
# Respondents Age



# Hispanic Respondents Gender

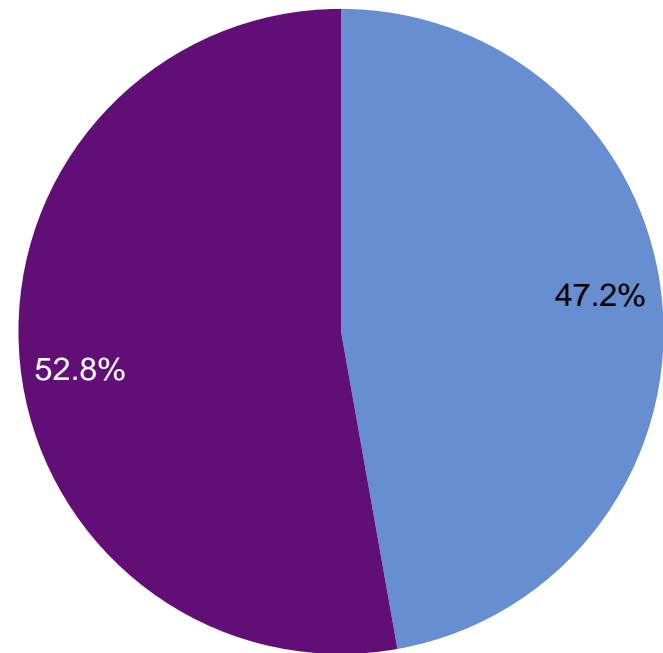


■ Male ■ Female



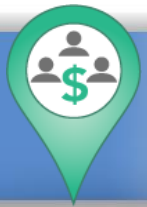
**Hispanic Consumers**

■ Male ■ Female

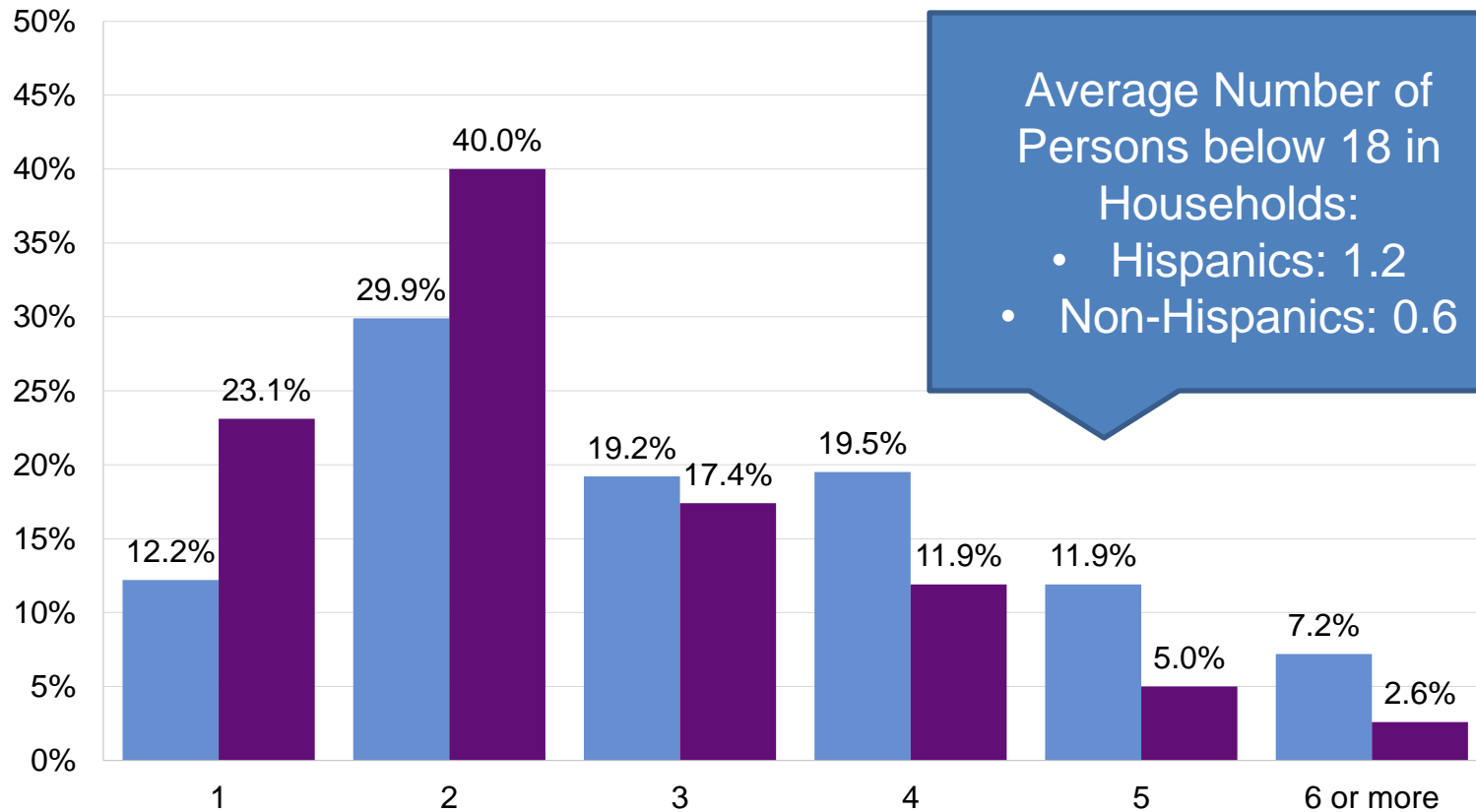


**Non-Hispanic Consumers**

# Size of Household



■ Hispanics ■ Non-Hispanics

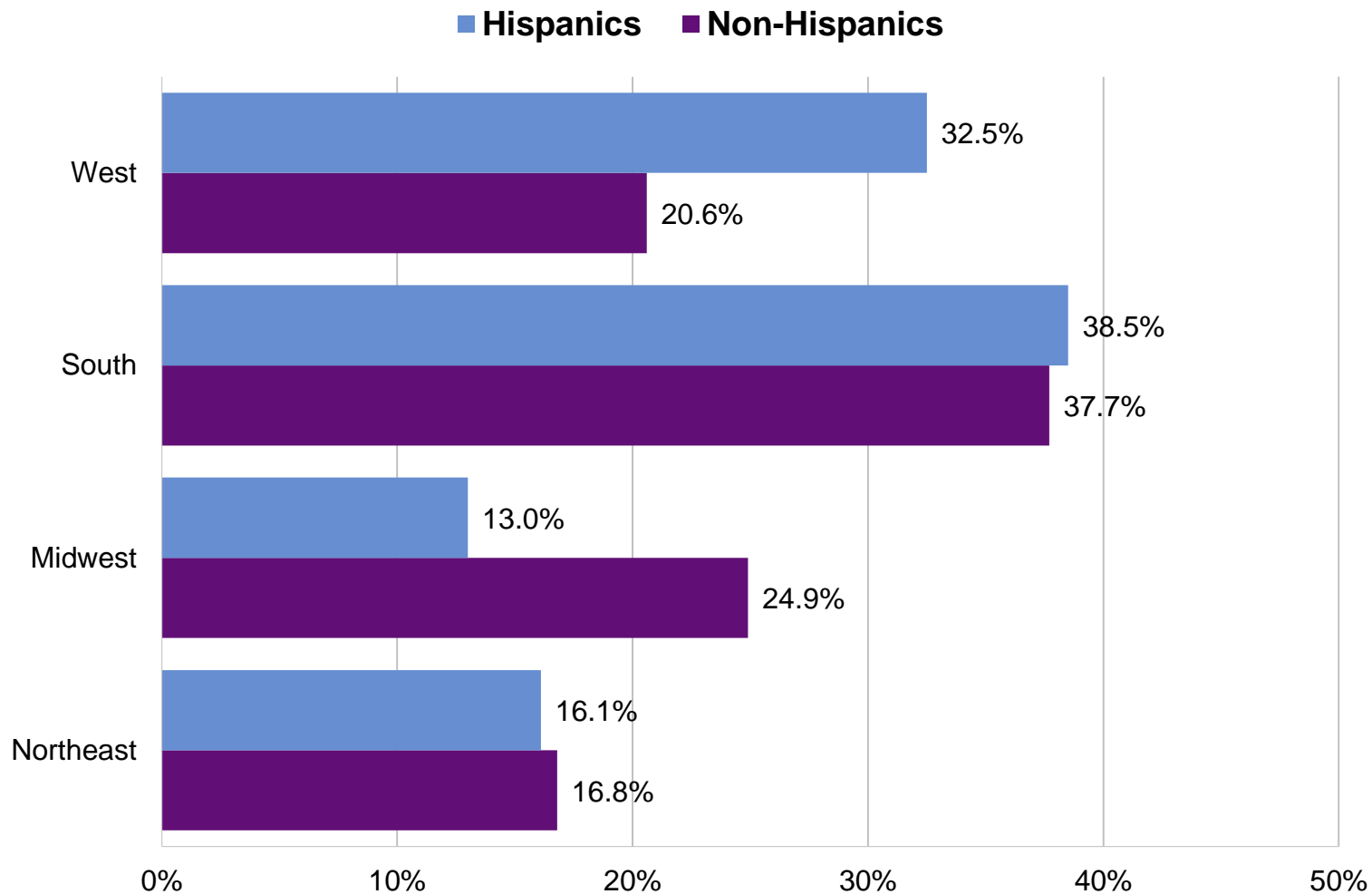
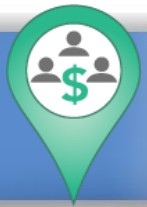


Average Number of Persons below 18 in Households:

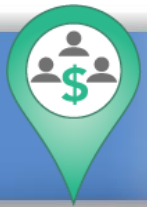
- Hispanics: 1.2
- Non-Hispanics: 0.6

D1

# Respondents U.S. Geographic Region

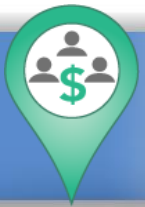


# Top Findings of Hispanic Consumer



- Hispanic consumers are **far more likely to use mobile devices** (tablet and smartphone) for local shopping than non-Hispanic consumers.
  - Tablet: 23.6% Hispanics vs. 15.5% non-Hispanics
  - Smartphone: 48.5% Hispanics vs 32% non-Hispanics
- Hispanic consumers are **more likely to use their devices** (tablet, laptop, smartphone and desktop) daily **for local shopping**.
- Hispanic consumers **index higher on all on social networks** used.
- Despite their heavy social media use, Hispanic consumers **still list family and friends as the most trustworthy source** for local shopping information (83.2%).

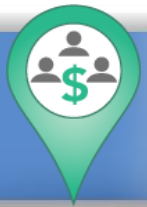




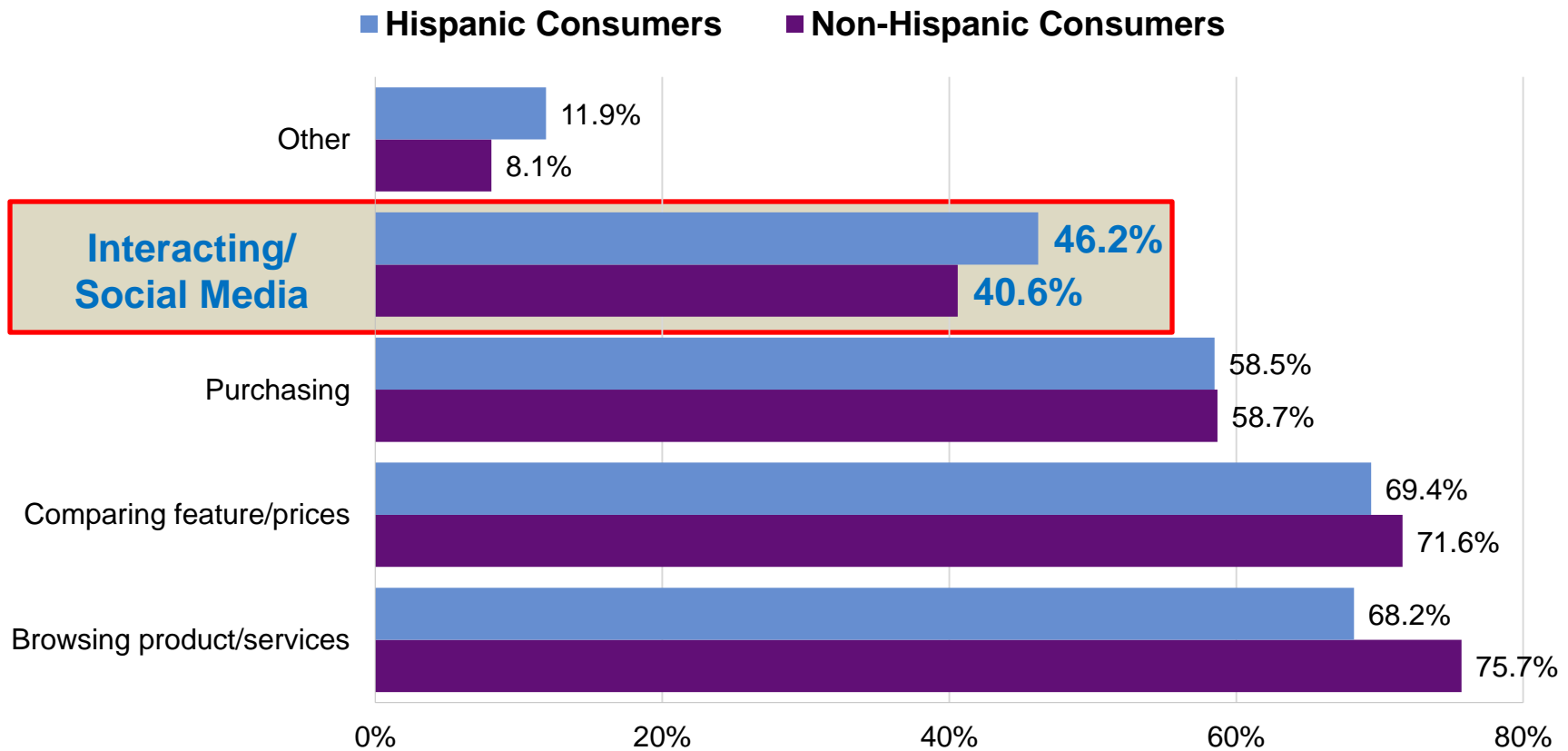
# Local Buying Activity



# Local Digital Shopping Activities (Prior 6 Months)

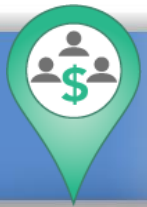


Hispanic consumers interacted more with social media in the last six months, compared with non-Hispanic consumers. (46% vs. 41%)

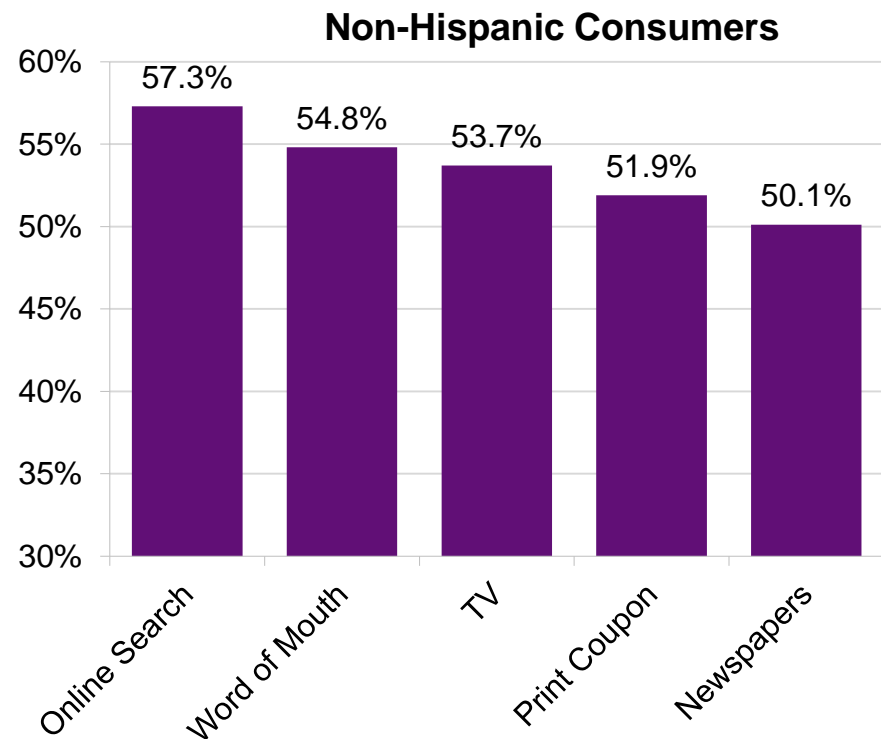
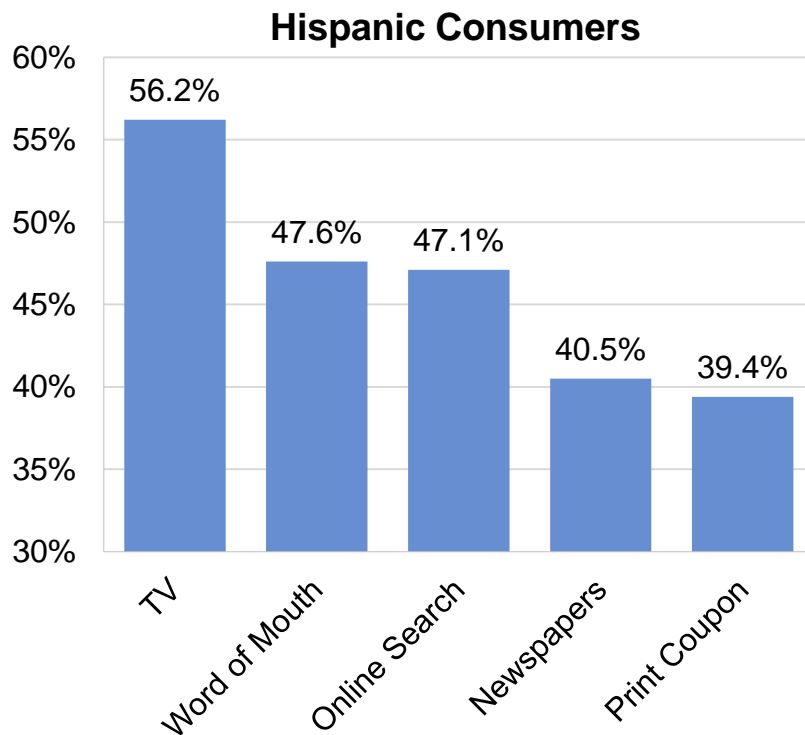


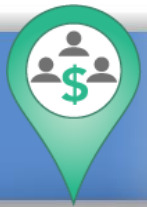
Data: Hispanics

# Sources Used Regularly by Consumers for Local Shopping (25 mile radius)



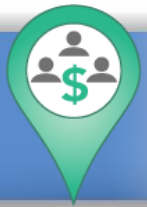
Hispanic consumers' most used source for local shopping is TV, compared with online search for non-Hispanic consumers.



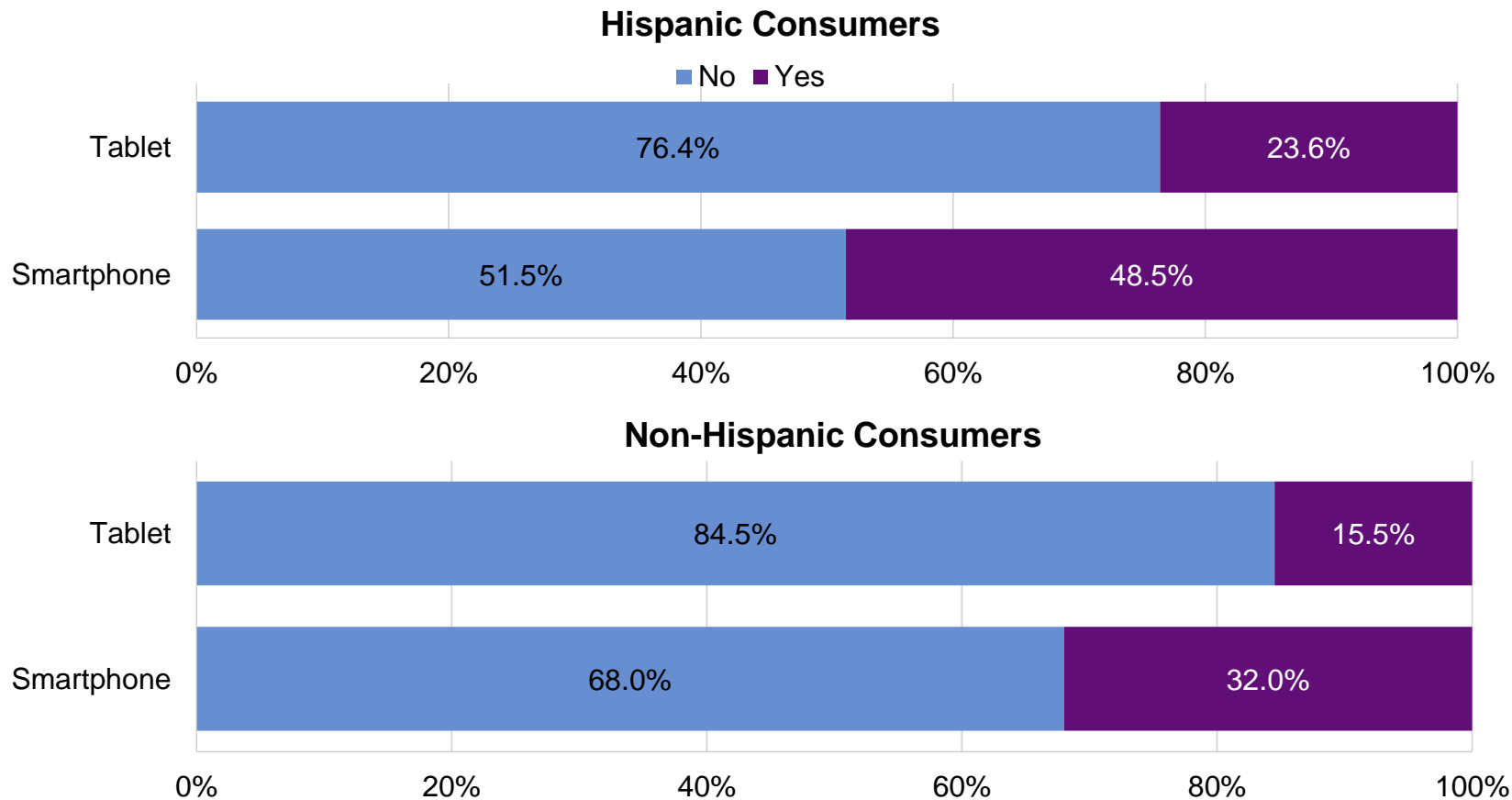


# Devices Used in Local Buying

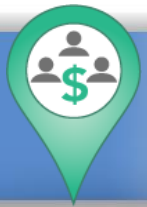
# Mobile Devices Used For Local Shopping



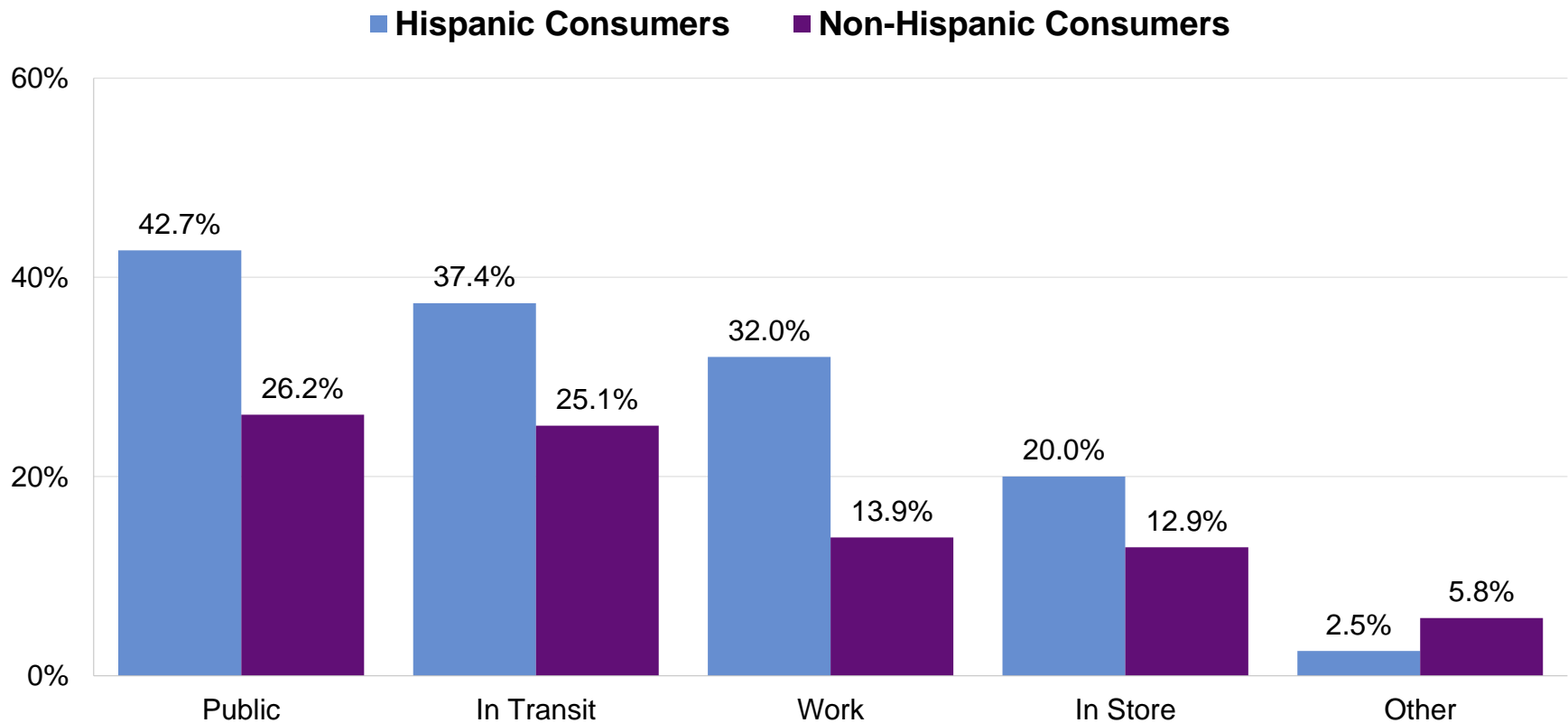
**Hispanic consumers are far more likely to use their mobile devices for local shopping than non-Hispanic consumers.**



# Use of Tablet For Local Shopping By Location

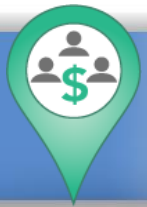


Hispanic consumers are far more likely to use their tablets outside of home than non-Hispanic consumers.

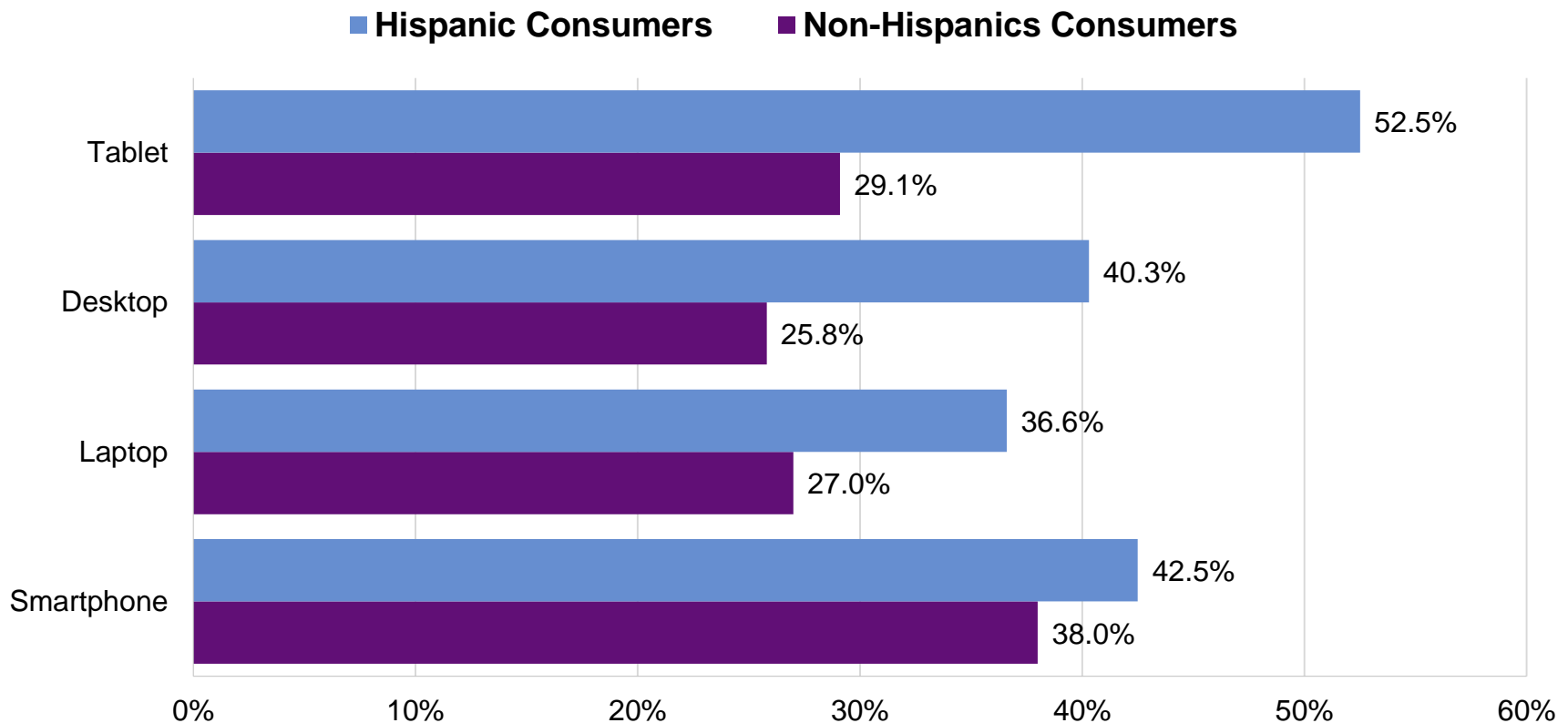


Data: Hispanics

# Device Daily (or more) Use For Local Shopping



Hispanic consumers are more likely to use their electronic devices daily for local shopping compared with non-Hispanic consumers.

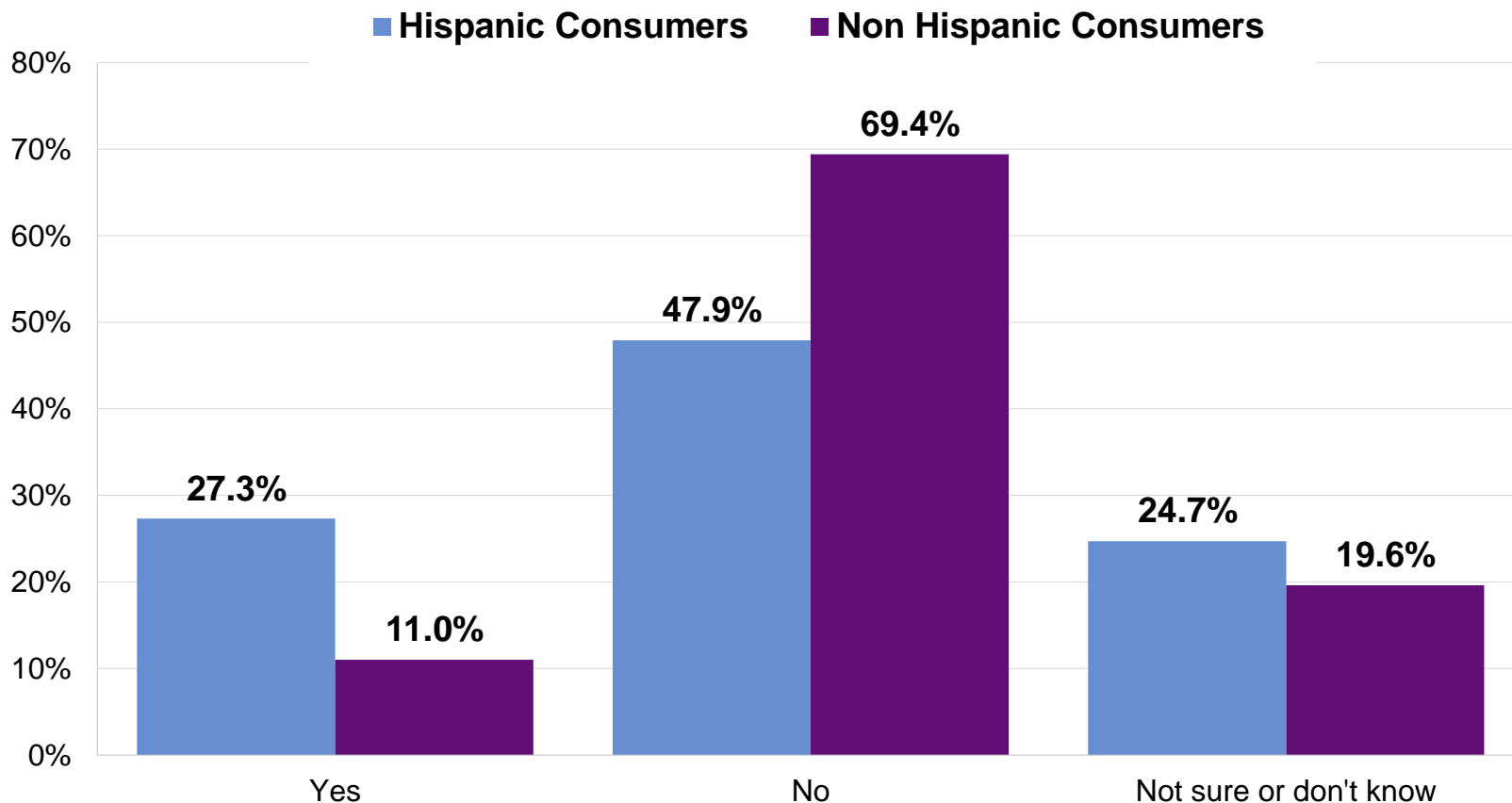


Data: Hispanics

# Usage of Smartphone or Tablet for Local Shopping (Next 6 Months)



Hispanic consumers are more likely to use a smartphone or tablet for future local shopping (27% vs. 11%).

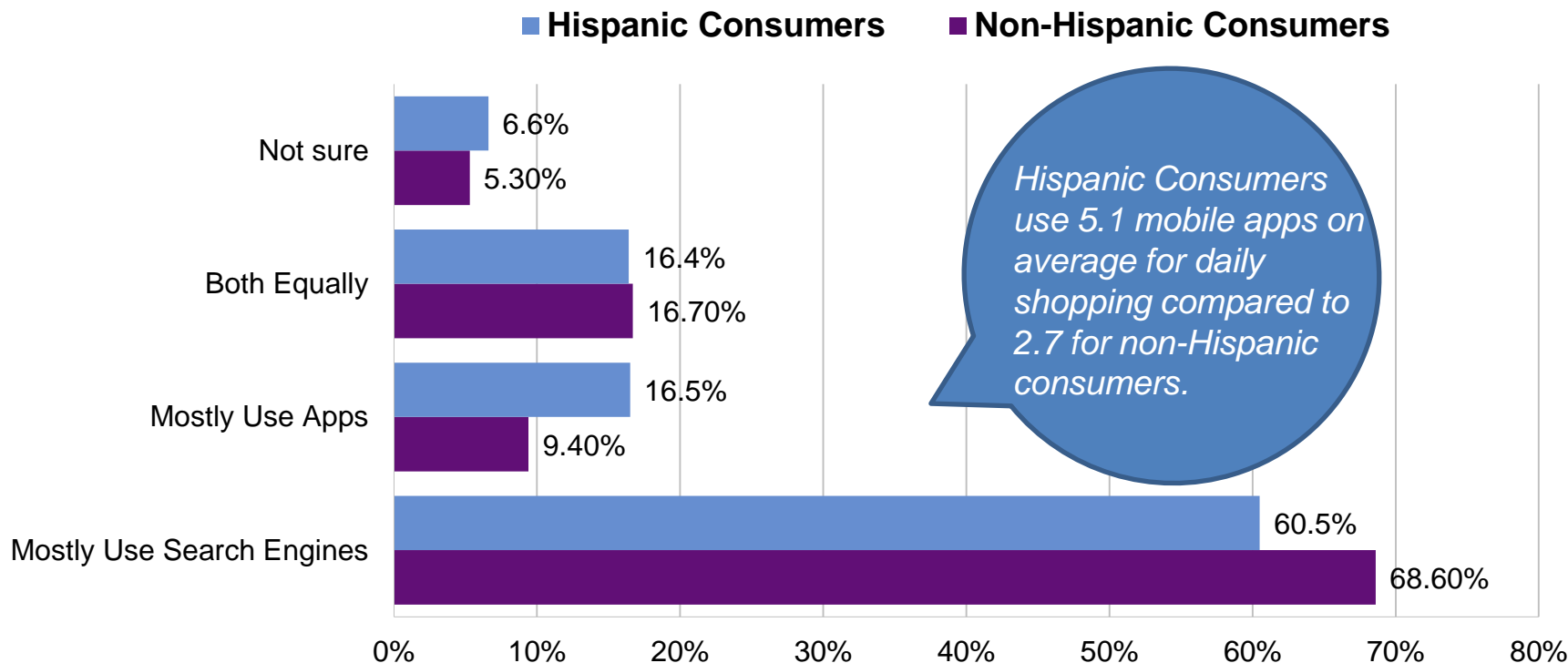


Data: Hispanics

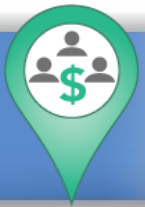
# Mobile Search vs. Mobile Apps for Local Shopping



Hispanic consumers are less likely to use search engines on a tablet or smartphone (69% vs. 61%), but are more likely to use apps on a tablet or smartphone (17% vs. 9%) for local shopping.

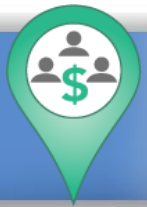


Data: Hispanics



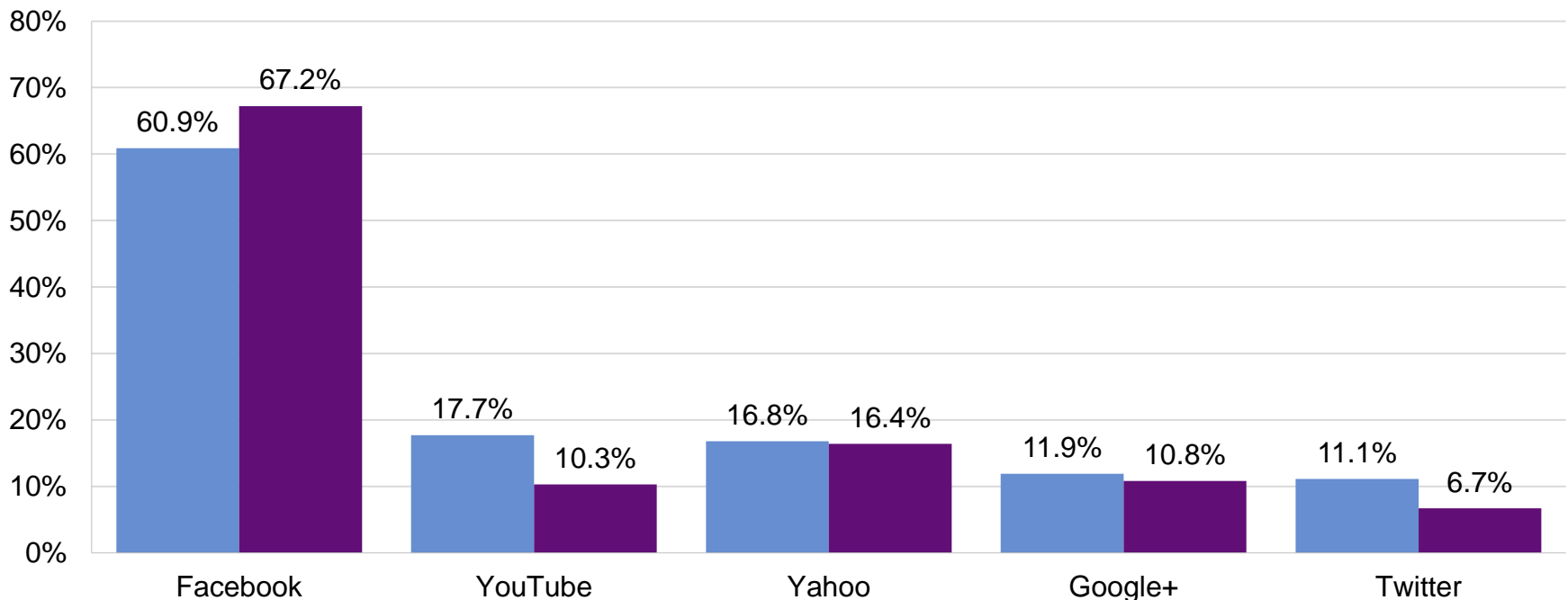
# Use of Social Networks in Buying Local

# Social Networks Used for Local Shopping



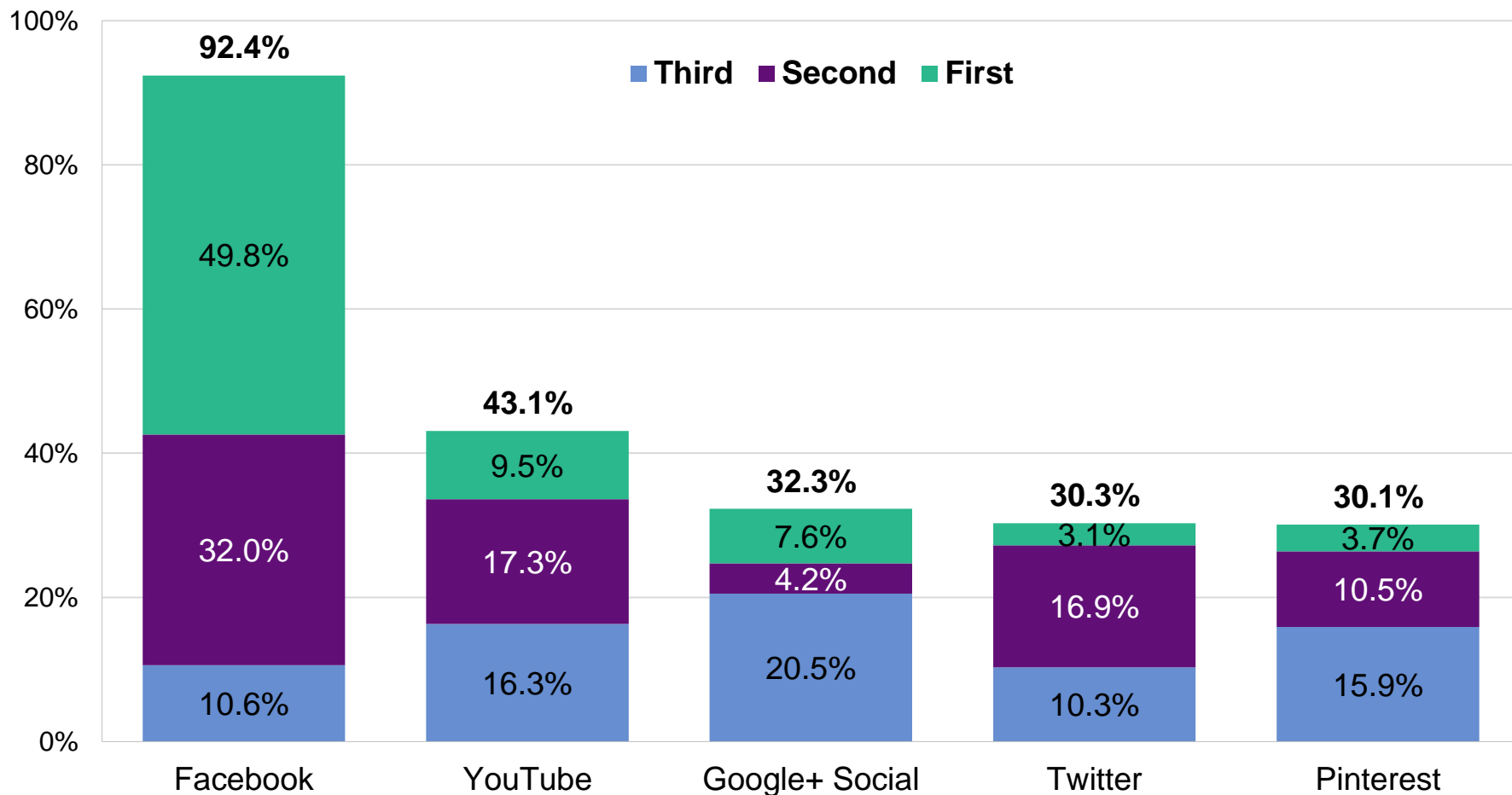
When used for local shopping, Hispanic consumers index higher on all social media networks except Facebook (61% vs. 67%) when compared with non-Hispanic consumers.

■ Hispanic Consumers ■ Non-Hispanic Consumers



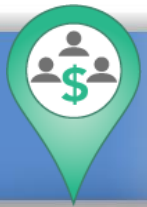
Data: Hispanics

# Rank Use of Social Network Sites for Local Shopping – Hispanic Consumers

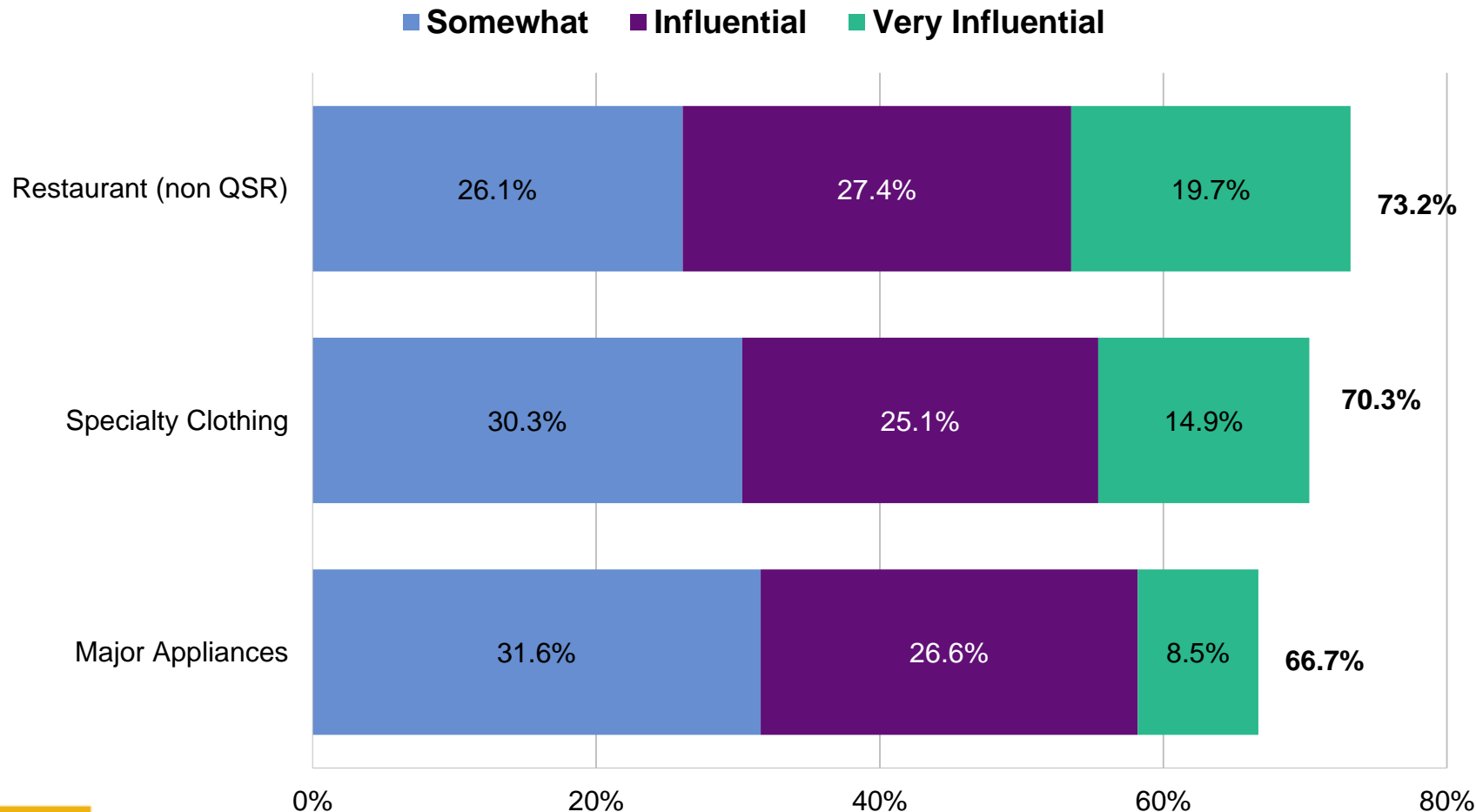


Data: Hispanics

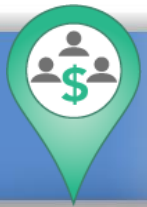
# Influence of Social Media on Selecting a Local Business - Hispanic Consumers



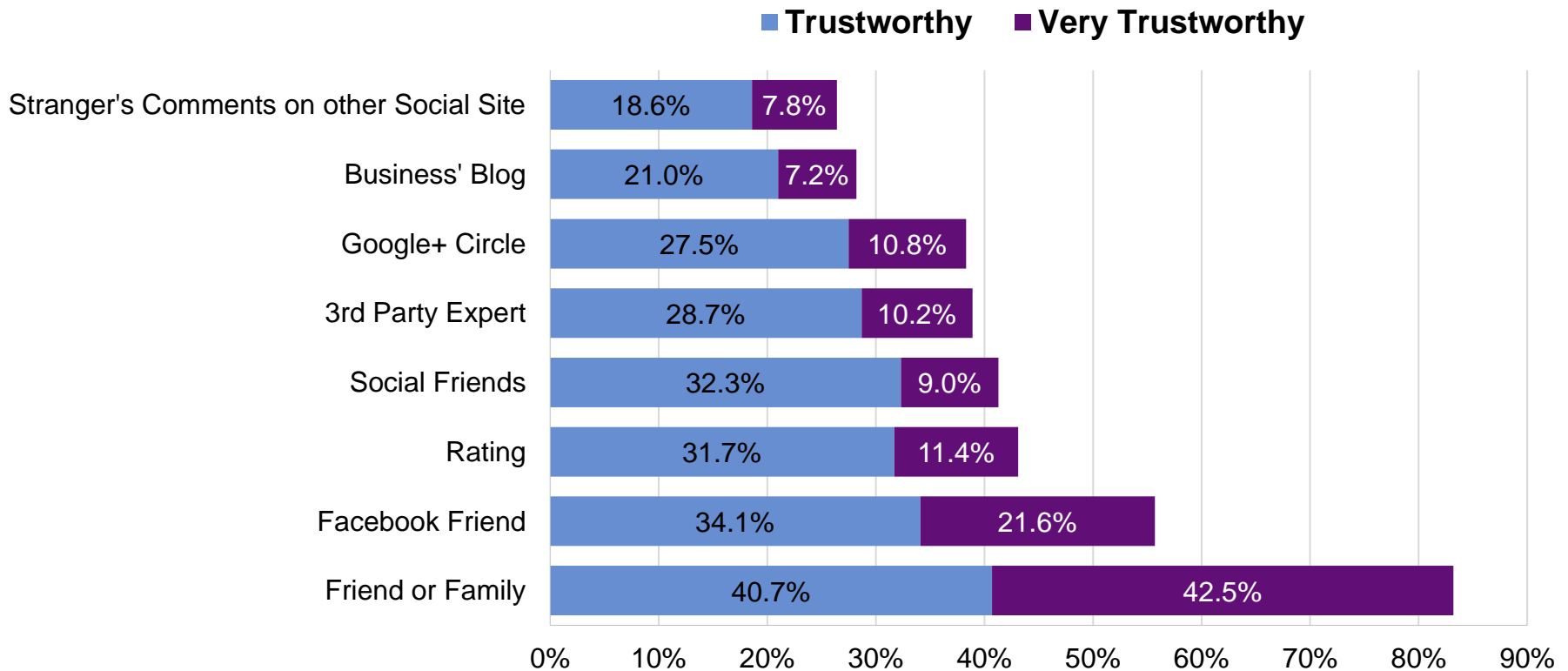
**Top three businesses benefitting from Hispanic Consumer usage of social media.**



# Hispanic Trust in Sources of Information for Local Products and Services

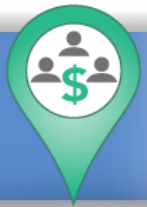


Hispanic consumers are more likely to find all of the categories below more trustworthy for information on local products and services. Despite their heavy social media use, Hispanic consumers still list family and friends as the most trustworthy source.



Data: Hispanics

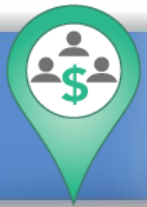
# Summary of the Hispanic Consumer Shopping



- **Have adopted digital devices** and use them *daily* for shopping for local products and services.
- **Utilize more apps than search engines** for mobile local shopping.
  - Among different types of local businesses, heavily rely on social media for restaurant choices.
  - More likely to support local businesses.
  - Rely the most on family and friends for local shopping decisions.

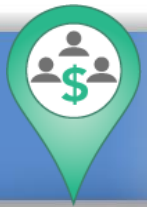


# Takeaways for Businesses Serving the Hispanic Market



- Mobile and social advertising is vital to establish a relationship with Hispanic consumers as they heavily use these channels to compare, browse and purchase local products and services.
- Social campaigns are tremendously effective for local businesses to drive in store purchases.
- Mobile campaigns must include social and loyalty elements as Hispanics use devices to shop locally and are more loyal to local businesses than the non Hispanics.
- TV ads with a digital component (mobile or social) absolutely help influence purchases more than TV ads alone.

# CCM Reports Available for Purchase



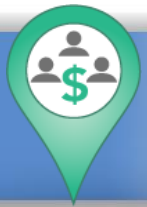
- CCM examines how U.S. consumers are evolving their use of traditional and online information sources to find and locate local serving businesses.
- Reports can showcase results from different views
  - Location
  - Ethnicity
  - Sex
  - Age
  - Channel
  - Education
  - Income
  - Type of Metro



Small preview of data topics:

- *Sources Used for Shopping for (Local Services, Travel & Entertainment, Merchandise or Other Services)*
- *Local Shopping Activities (Last 6 Months)*
- *Percentage of Local Purchases (Last 6 Months) From Promotions, Coupons, Deals or Discounts*
- *Smartphone Scanned Code Loyalty Program*
- *Used Click To Call (Last 6 Months) On Computer Or Smartphone*
- *Percentage of Time Consumers Make Purchase Decisions By Source*

# How to Purchase



## consumer mmerce monitor™

- To order a Consumer Commerce Monitor (CCM) report for your business, contact:

**STEVE PASSWAITER**, VP Business Development  
[spasswaiter@biakelsey.com](mailto:spasswaiter@biakelsey.com) or (703) 818-2425

Learn more on our website:

[www.biakelsey.com/ConsumerCommerceMonitor](http://www.biakelsey.com/ConsumerCommerceMonitor)



*BIA/Kelsey's Consumer Commerce Monitor™ (CCM) offers a unique lens into the thought process of today's consumer. These insights are invaluable for advertisers and those supporting advertisers.*