THE ROLE OF INTERNET FOR COOKING & BAKING IN GERMANY

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Research Behaviour Around Cooking & Baking
93% of people in Germany cook at least once a week

How often do you cook?

- **DAILY**: 42%
- **4-5X / WEEK**: 20%
- **2-3X / WEEK**: 22%
- **1X / WEEK**: 9%
- **1X / MONTH**: 4%
- **RARELY**: 2%
- **NEVER**: 2%

Women over-index on “daily” (52% vs. 32%)

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: Wie oft kochen Sie? N=772
# Top 20 General Cooking Questions in Germany

<table>
<thead>
<tr>
<th>Inspiration</th>
<th>How to...</th>
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<tbody>
<tr>
<td>was soll ich kochen?</td>
<td>kartoffeln kochen wie lange?</td>
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Source: Google Internal Data, DE (Top Cooking Questions, October 2014-October 2015)
The internet is the top information source for recipes in Germany

What are your top information sources for recipes?

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Was sind Ihre Hauptinformationsquellen zum Thema Rezepte?" N=1131
Top benefits of online recipe sources vs. offline sources:

- **43%**: Unlimited choices of recipes
- **42%**: Finding recipes by category quickly
- **41%**: They are for free
- **29%**: Help through pictures & videos
- **22%**: Assurance through comments & ratings
- **16%**: Possibility to exchange ideas with other users

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Was sind die größten Vorteile von Online Koch- und Backrezepten im Vergleich zu Offline-Quellen wie Kochbücher und TV?"  N=1131
65% of the people are satisfied or very satisfied with the information & resources available online

How satisfied are you with the online offering around cooking and baking?

- 6% 6 stars
- 7% 7 stars
- 21% 8 stars
- 35% 9 stars
- 31% 10 stars

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Wie zufrieden waren Sie mit dem Angebot zum Thema Kochen und Backen im Internet?" N=995
Most people search for recipes online using their smartphones

SMARTPHONE: 44%
LAPTOP: 38%
DESKTOP-PC: 29%
TABLET: 24%

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Welche Endgeräte haben Sie am häufigsten für die Suche von Rezepten genutzt?" N=1003
While cooking, 73% use an internet device

43% use mobile

23% use tablets

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Nutzen Sie einer der folgenden Endgeräte/Funktionen während des Kochvorgangs?" N=1003
And 4% of people even used voice search while cooking

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: “Nutzen Sie einer der folgenden Endgeräte/Funktionen während des Kochvorgangs?” N=1003
People use the internet for different cooking purposes:

- **Recipes**: 64%
- **Inspiration**: 29%
- **Nutritional Information**: 16%
- **Food Trends**: 12%
- **Food Pics**: 10%
- **Share Food Pics**: 7%

Women over-index on "looking for inspirations online"
Types of online destinations differ depending on people’s purposes

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<td>Blogs &amp; Online Communities</td>
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<td>Social Networks</td>
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Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Wo suchen Sie online nach Rezepten/Inspirationen/Informationen zu XXX?" N=995
YouTube is the social network for recipes online:

- **YouTube**: 47%
- **Facebook**: 30%
- **Instagram**: 10%
- **Pinterest**: 9%
- **Tumblr**: 5%
- **None**: 5%
- **Twitter**: 4%

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Welche Soziale Netzwerke nutzen Sie um sich über Kochen und Backen zu informieren?" N=1131
Top Food Influencers on YouTube

1. BaKo backenkochen
   - 106,644 views • 1 year ago

2. Esslust
   - 129,377 views • 1 year ago

3. yummypilgrim
   - 76,853 views • 1 year ago

Source: YouTube Internal Data - Vloggers ranked by total number of views in 2015
How TV Influences Recipe Searches
People’s media consumption has changed

% OF MEDIA TIME OFFLINE

2013: 76%
2014: 71%

% OF MEDIA TIME ONLINE

2013: 24%
2014: 30%

Source: eMarketer daily media time in DE.
How much time cooking lovers spend with TV per day:

- **LESS THAN 1h / DAY** 23%
- **1h - 2h / DAY** 21%
- **2h - 3h / DAY** 14%
- **> 3h / DAY** 11%
- **NO INTEREST IN WATCHING TV** 32%

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: “Wie oft sehen Sie durchschnittlich am Tag fern?” N=1463
Most of them like to watch cooking shows on TV

Do you watch cooking shows on TV?

- YES, RARELY: 32%
- YES, AT LEAST WEEKLY: 24%
- YES, AT LEAST MONTHLY: 24%
- NEVER: 20%
Search reacts to TV: People look for information online while watching TV

Further Recipes

- 41% Further Recipes
- 26% Information about the cooked dish
- 22% None of the above*

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Nach welchen Themen recherchieren sie online parallel zum Schauen einer TV Kochsendung?" N=1001
How the Internet Influences Grocery Shopping
45% of people in Germany have purchased groceries online

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Wie oft kaufen Sie Lebensmittel online?" N=1003
Smartphones are taking over the role of shop owners
56% of people in Germany search for information online while buying groceries

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Suchen Sie während des Einkaufs (z.B. im Supermarkt) nach Informationen online?" N=1003; *share of respondents that answered with "yes, often", "yes sometimes" or "yes, rarely"
Information people look for online while buying groceries

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: “Nach welchen Informationen suchen Sie während ihres Lebensmittel-Einkaufs?” N=1003
In terms of local information, they mostly look for opening hours and promotions.

- Opening hours for supermarkets: 48%
- Promotional offers in supermarkets: 29%
- Coupons and shopping vouchers: 21%
- Location search for a supermarket: 17%
- Directions to a supermarket: 12%

Source: Google Consumer Surveys, General Population in Germany, October 2015
Q: "Nach welchen der folgenden lokalen Informationen haben Sie auf Ihrem Smartphone letztens gesucht?" N=1003
What Brands Can Offer
How Brands Win in the Online Recipe Space

✓ Regularly updating recipes and other information across online channels
✓ Monitoring trends to position content accordingly
✓ Aligning campaign planning and budget allocation to search interest
✓ Ensuring findability of content across online channels
✓ Optimizing content to mobile and making it user-friendly
✓ Capturing search interest generated by TV content
Thank You

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