



Young Males Digital Path to Purchase

Google/Ipsos OTX, U.S.

May 2012

Objective, Background, and Methodology

- **Objective:** To understand how the internet affects a young male's path to purchase across home, personal, beauty, food, beverages, and restaurant categories
- **Sample:** 5,539 young males ages 18-34, online at least once a week, have purchased or influence decisions in categories below
- **Categories:** Packaged Foods, Beverages, Alcohol, Beauty and Personal Care, QSR/Food, Sports Apparel
- **Methodology:** General population control cell of 18-64 was included for comparison purposes

Topline Summary

- **Guys look to the internet** – They spend more time online than watching TV and rely on the internet to inform purchase-making decisions
- **Guys are search pros** – They search twice as much versus the general population and get all the info they need from the first page of search results
- **Guys love online videos**: Their channel of choice is YouTube and they are highly likely to engage in research, sharing and purchasing after watching an online video
- **Guys use social networks**: They are engaged users who consume and share information and media on social networks
- **Guys are always connected, always mobile**: They have embraced mobile technology and cross-device use

Digital Plays an Important Role to Guys



The Internet is like a Parent

Guys look to the internet much as they would to a caring parent. They use the internet to inform purchasing decisions and stay in touch. Nowadays, they spend more time online than watching TV.



Search is like an Older Sibling

Guys look to search much as they would to an older sibling. They not only know the ins and outs of asking a question on search but also know that they will find the answer they need. Search is always rewarding and satisfying for whatever problem they are trying to solve.



Mobile is like an "In Case of Emergency" Contact

Guys look to mobile much as they would to the "dial a friend lifeline" in *Who Wants to Be A Millionaire*. They know how to use multiple devices at a time and rely on their mobile phones in a pinch – at the store or researching something on the spot.



Online Video is like a Best Friend

Guys look to online video much as they would a best friend. They love to spend time with it because it helps them relax and stay in the loop. They share things after they engage with online video, and they're likely to search for more information about a product.



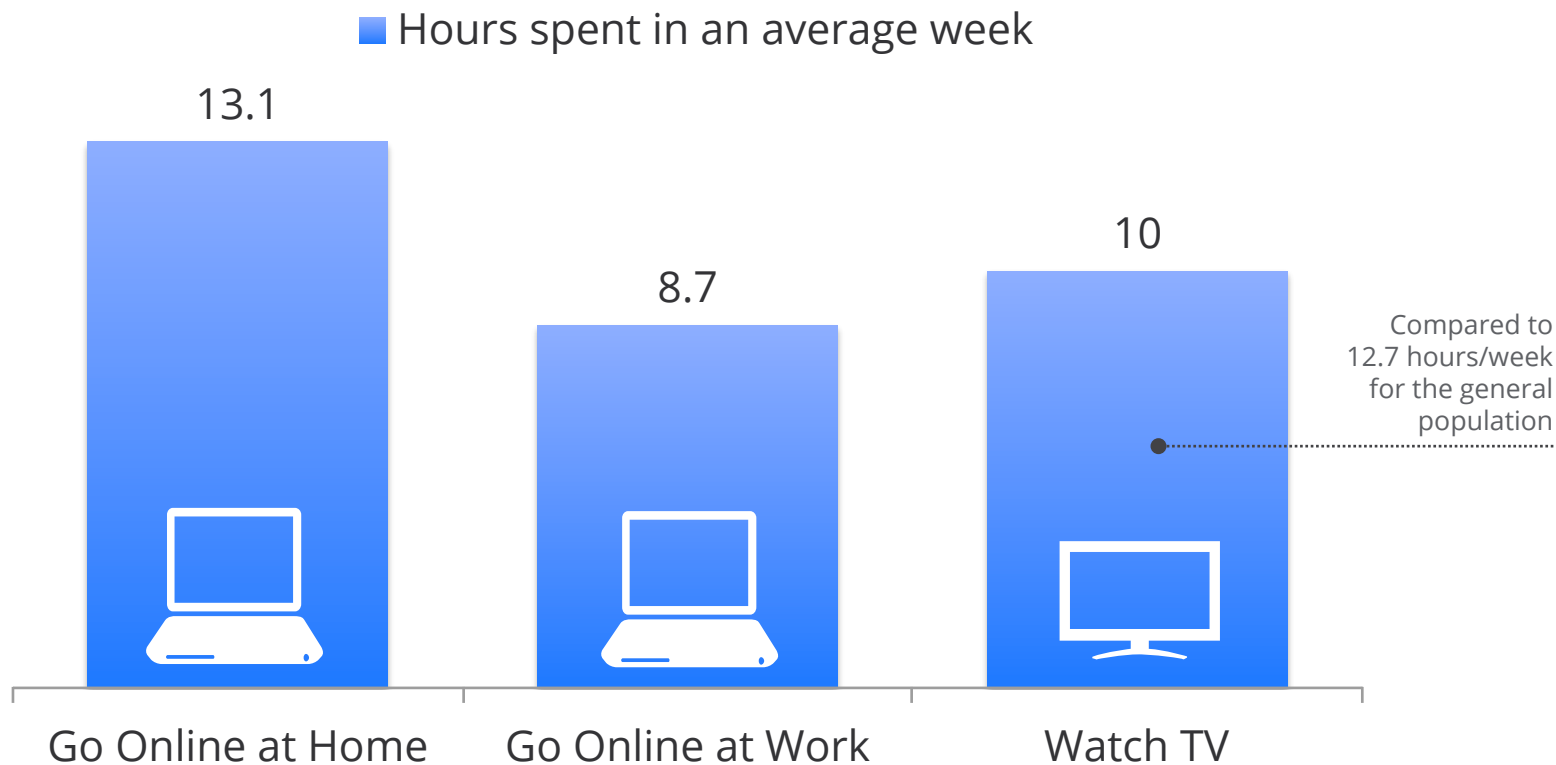
Social Networks are like a Cool Friend

Guys look to social networks much as they would a cool friend. Information is social currency, and guys use social networks to stay in the know (consume info) and show that they are (share info).

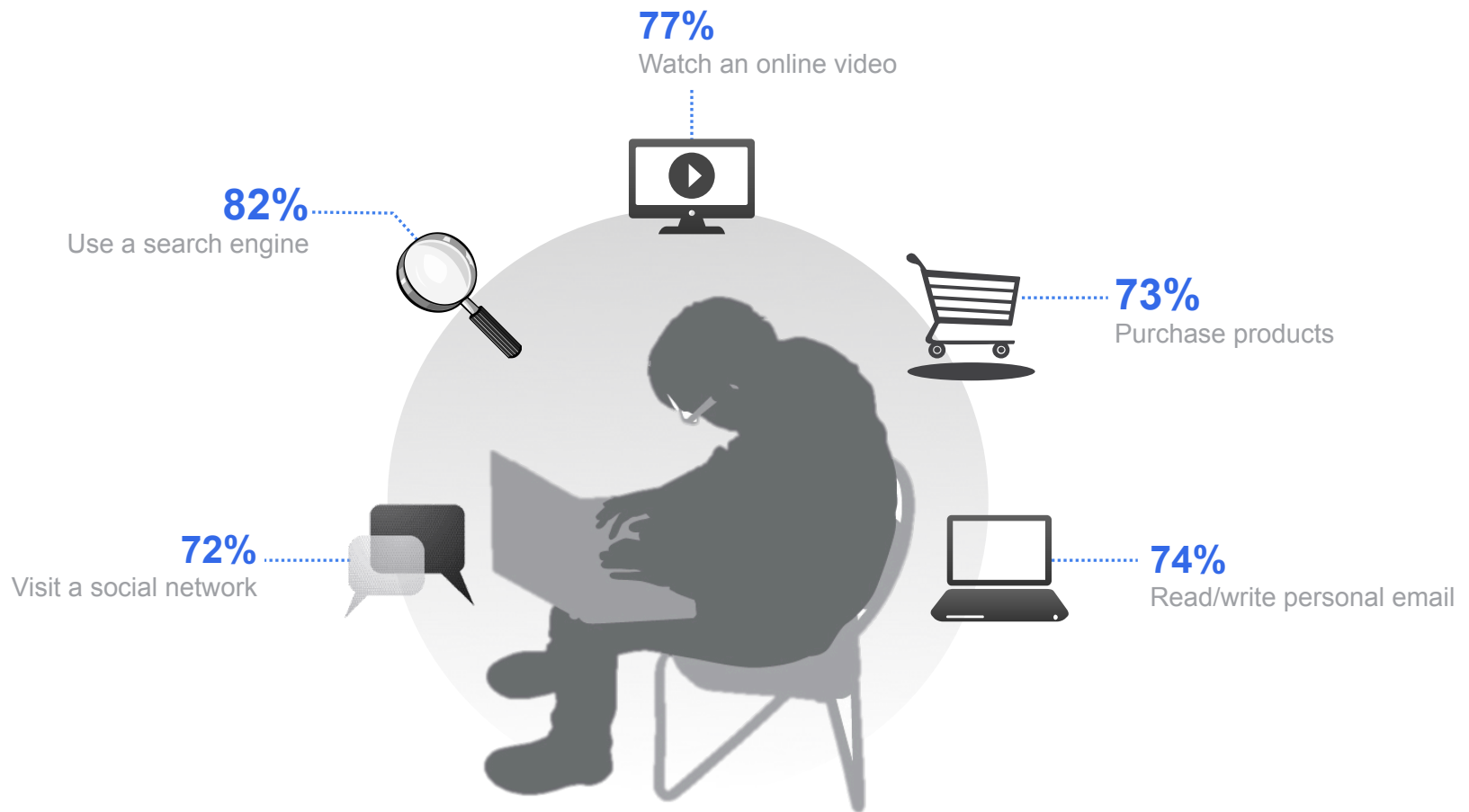


Guys Spend More Time Online Than Watching TV

They also spend less time watching TV than the general population



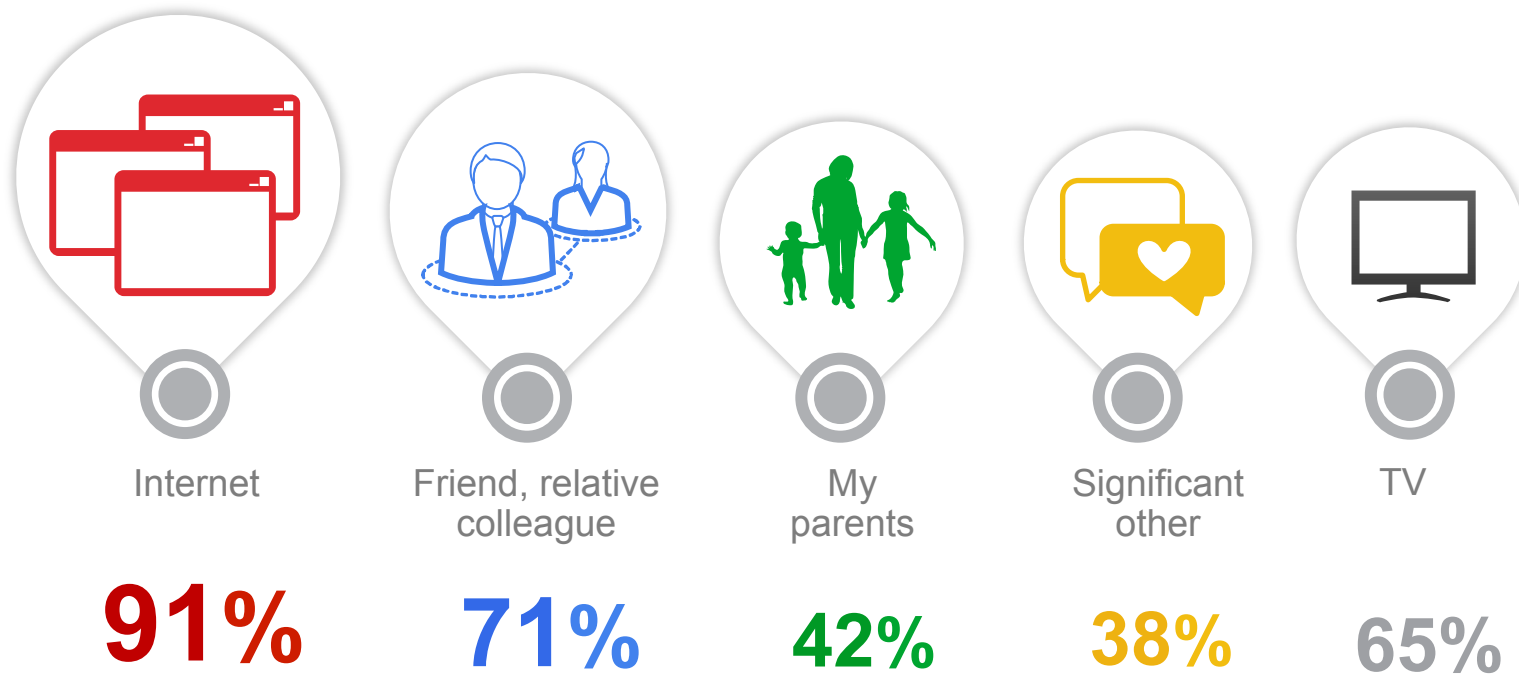
Guys Spend Their Time Online Searching and Watching Online Videos





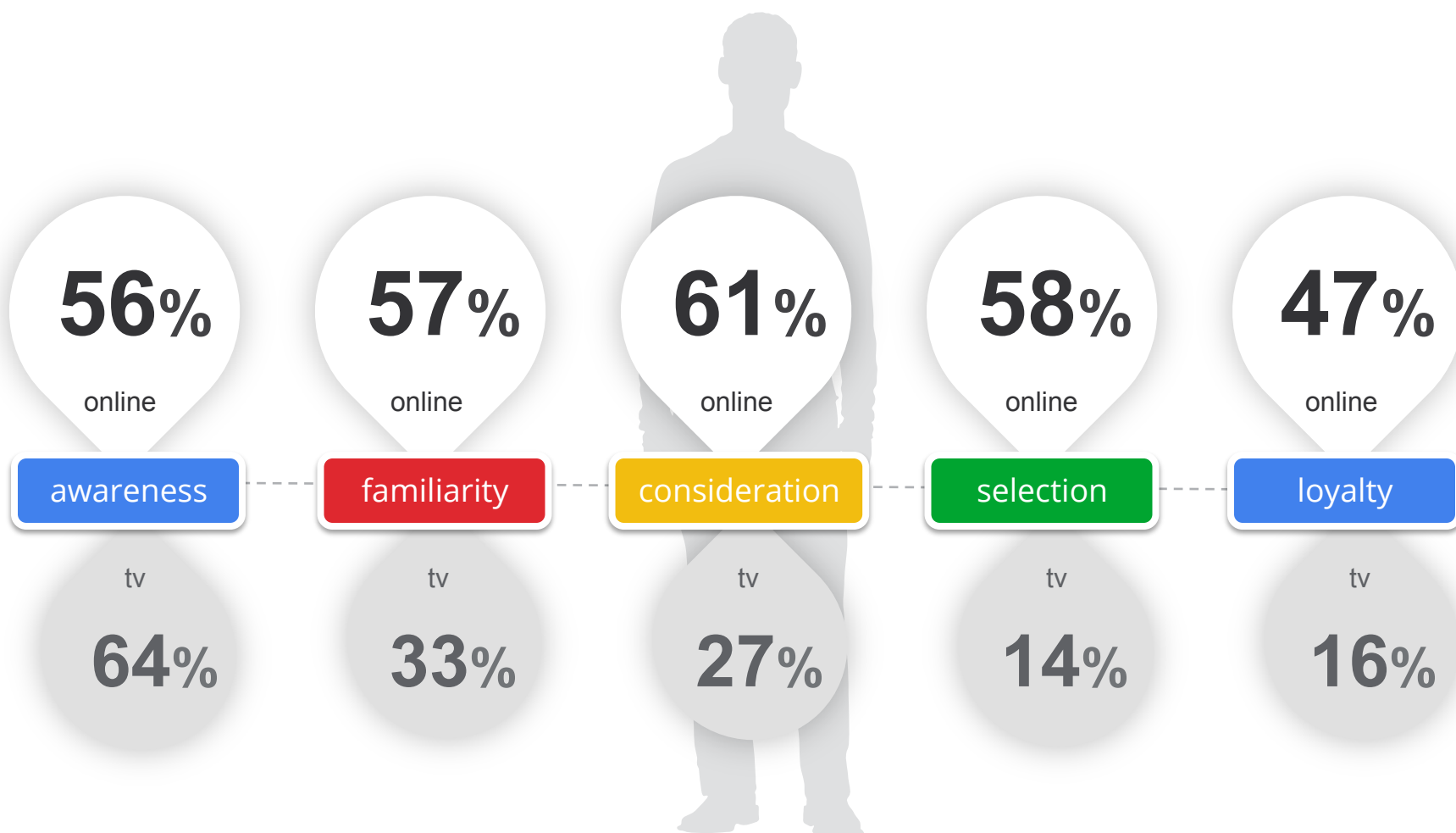
They Look to the Internet for Advice

Top sources young males use to find information on products & services





Guys Rely on the Internet at Every Stage along the Path to Purchase



Source: Google Ipsos OTX Young Males Study, US, May 2012

Q7: Think about when you purchase a product or service. At what stage in the purchase process, do you use each of the following sources? Please select all that apply for each.

Young Males Are More Likely Than The General Population To Utilize The Internet Throughout The Purchase Process

How Used Sources To Gather Info On Products / Services

	Awareness Used to hear about or discover product/service		Familiarity Used to help me learn more about product/service		Consideration Used to help me narrow down selection of product/service -		Selection Used to help me make a final decision about product/service-		Loyalty Used to keep up to date on news and deals related to a product/service I've purchased	
	Young Males	Gen Pop	Young Males	Gen Pop	Young Males	Gen Pop	Young Males	Gen Pop	Young Males	Gen Pop
Internet	56%	47%	57%	51%	61%	56%	58%	51%	47%	37%
Television	64%	61%	33%	32%	27%	27%	14%	14%	16%	13%
Radio	63%	65%	27%	24%	23%	18%	11%	11%	14%	12%
Magazines/Newspapers	60%	55%	39%	36%	31%	27%	16%	16%	16%	13%
In-Store Displays	57%	52%	35%	36%	35%	35%	26%	31%	14%	12%
Direct mail solicitation	57%	59%	32%	33%	26%	23%	15%	16%	14%	15%
Friend, relative or colleague	54%	49%	49%	45%	53%	43%	38%	32%	28%	22%
Spouse/Significant Other	52%	41%	44%	39%	55%	47%	54%	48%	33%	27%
My parents	48%	46%	45%	46%	52%	47%	41%	39%	28%	29%
My children	43%	48%	28%	27%	39%	29%	34%	34%	18%	27%
Experts	40%	38%	42%	46%	53%	47%	42%	42%	24%	20%

Source: Google Ipsos OTX Young Males Study, US, May 2012

Q7Think about when you purchase a product or service. At what stage in the purchase process, do you use each of the following sources? Please select all that apply for each.

Note: Green highlight indicates significant difference at 95% confidence. Floating Base: Used Source To Gather Information



Guys are search pros

They conduct **twice as many searches** in an average week than the general population

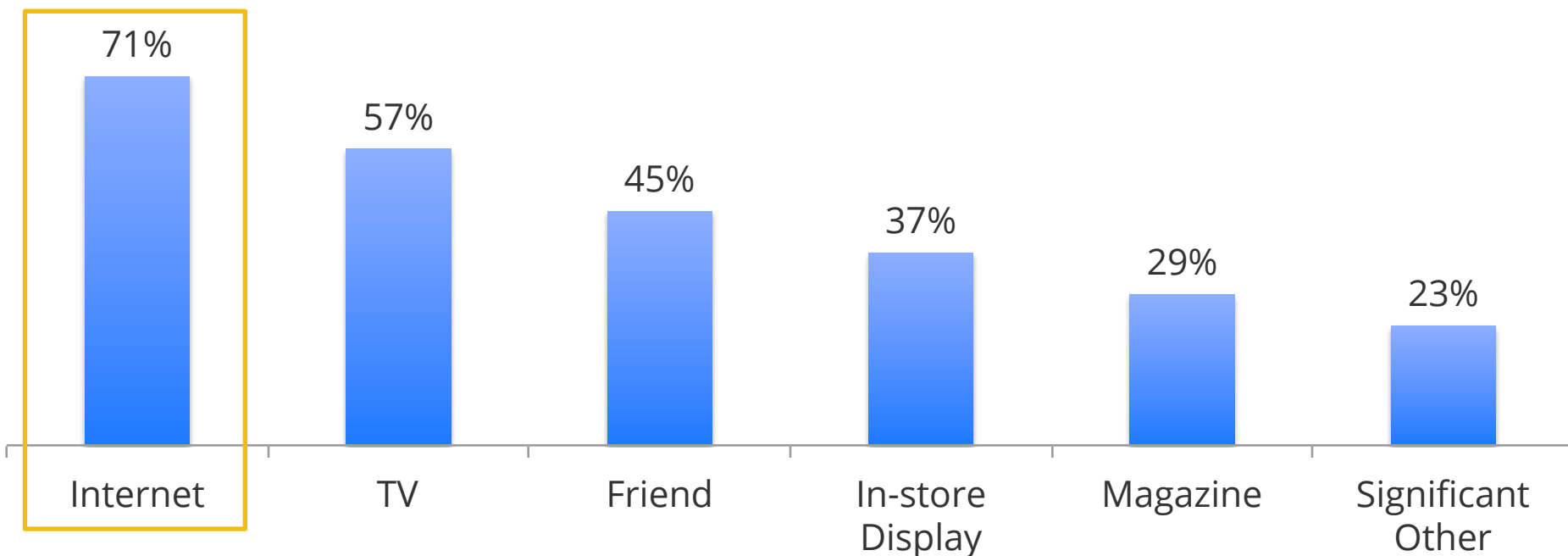
That's about **25 searches** per week



More Guys Hear About New Products on the Internet than through Any Other Medium

1 in 2 young males heard about a new product through a search engine

■ Percentage of young males who first heard about new product

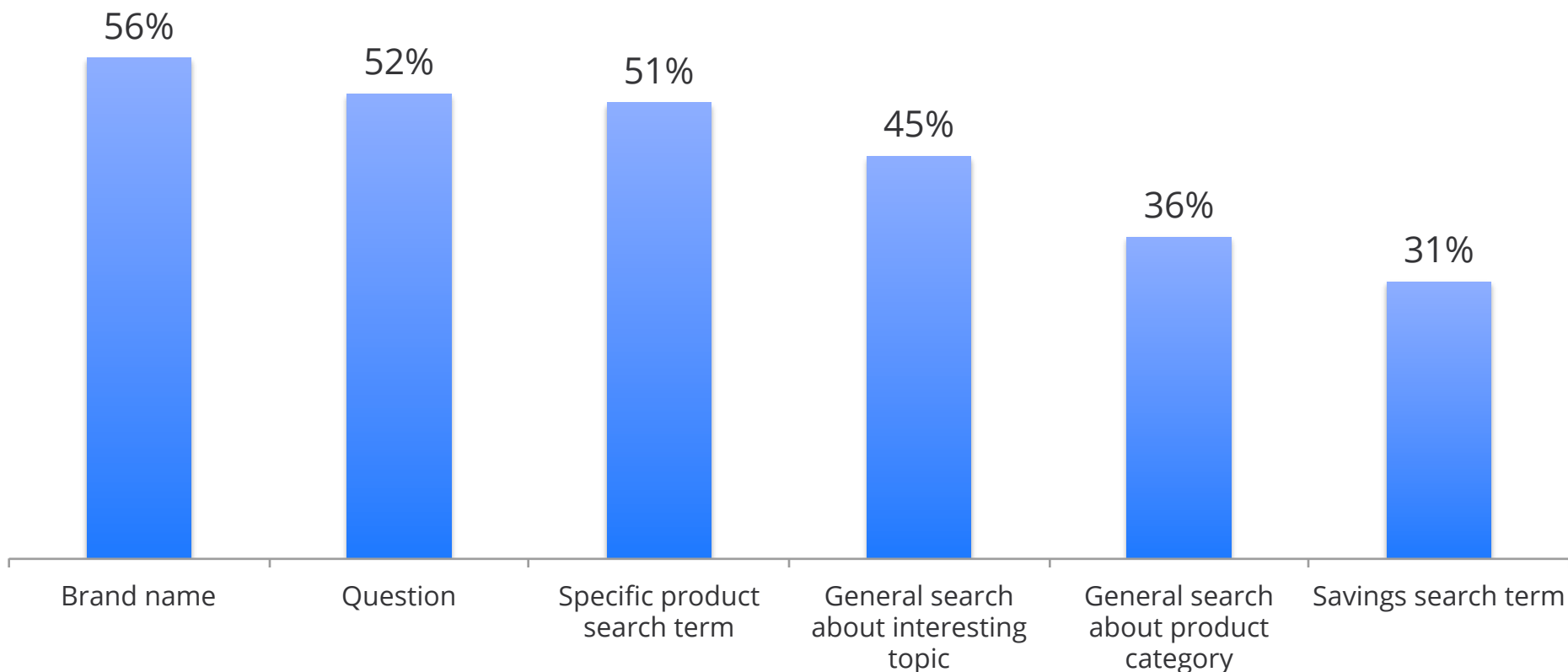


★ 80% of young males who heard about a new service on the internet went on to search for more information online



Once Guys Know About a New Product, They Search to Find Out More

■ Percentage young males who include following in search query



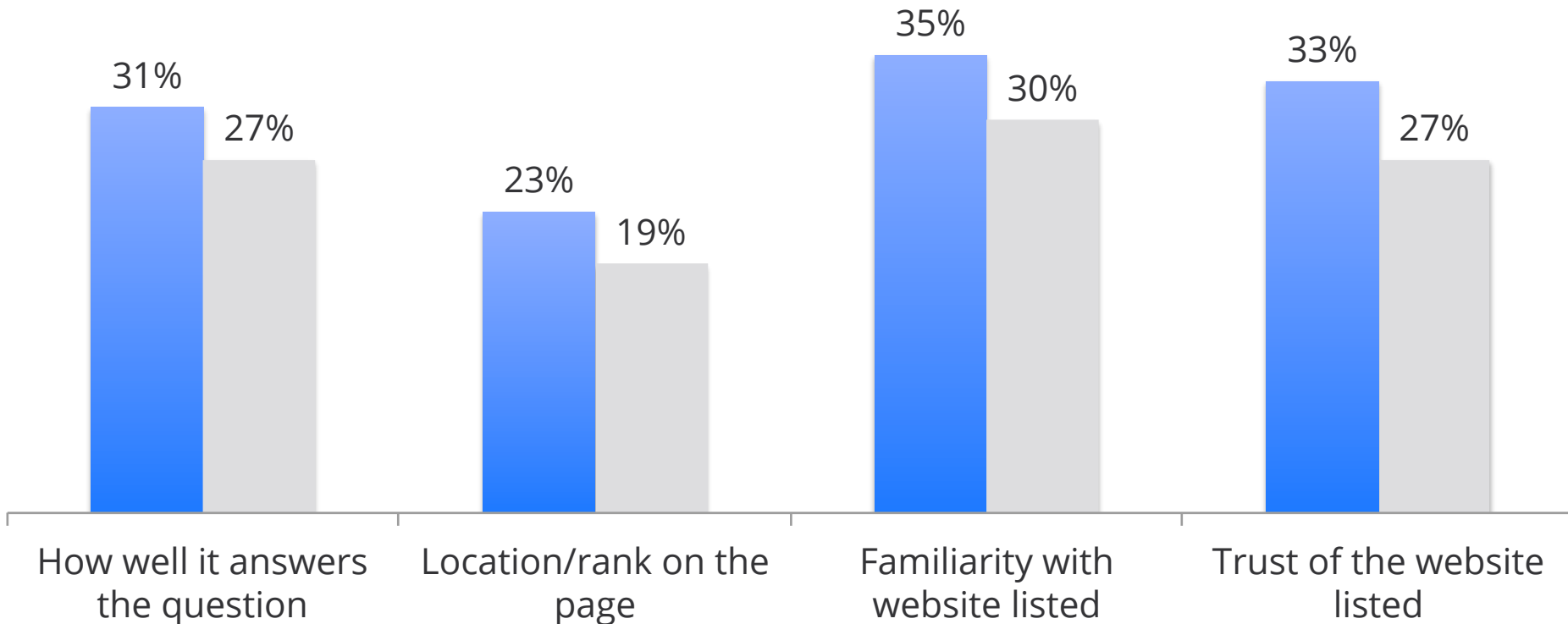
Source: Google Ipsos OTX Young Males Study, US, May 2012

Q17. When searching for new products or services, which of the following do you typically include in your search? (Select all that apply)



Guys Respond Well to Paid Search Ads

- Percentage of young males who feel influenced to click on paid search ad
- General population



Source: Google Ipsos OTX Young Males Study, US, May 2012

QSE4 Which of the following helps in your decision to click on a search result that is either a sponsored/paid (at the top or side of a search page) or a natural listing (in the middle of a search page)? Select all that apply for each.



Guys Watch Online Videos

How Many?

91% young males use an online video website, with 87% using YouTube (compared to 70% of the general population)

Then?

48% of young males forwarded a video to someone, looked for related online videos, or used a search engine to find out more info

You Tube



Why?

to be entertained (73%) to laugh (64%) to relax and unwind (58%) to learn something new (45%) – and to watch TV shows, movies, or commercials (52%)

So what?

Young males use online video to hear about (52%), learn more (45%), narrow down (40%) or decide on (27%) a purchase

Source: Google Ipsos OTX Young Males Study, US, May 2012

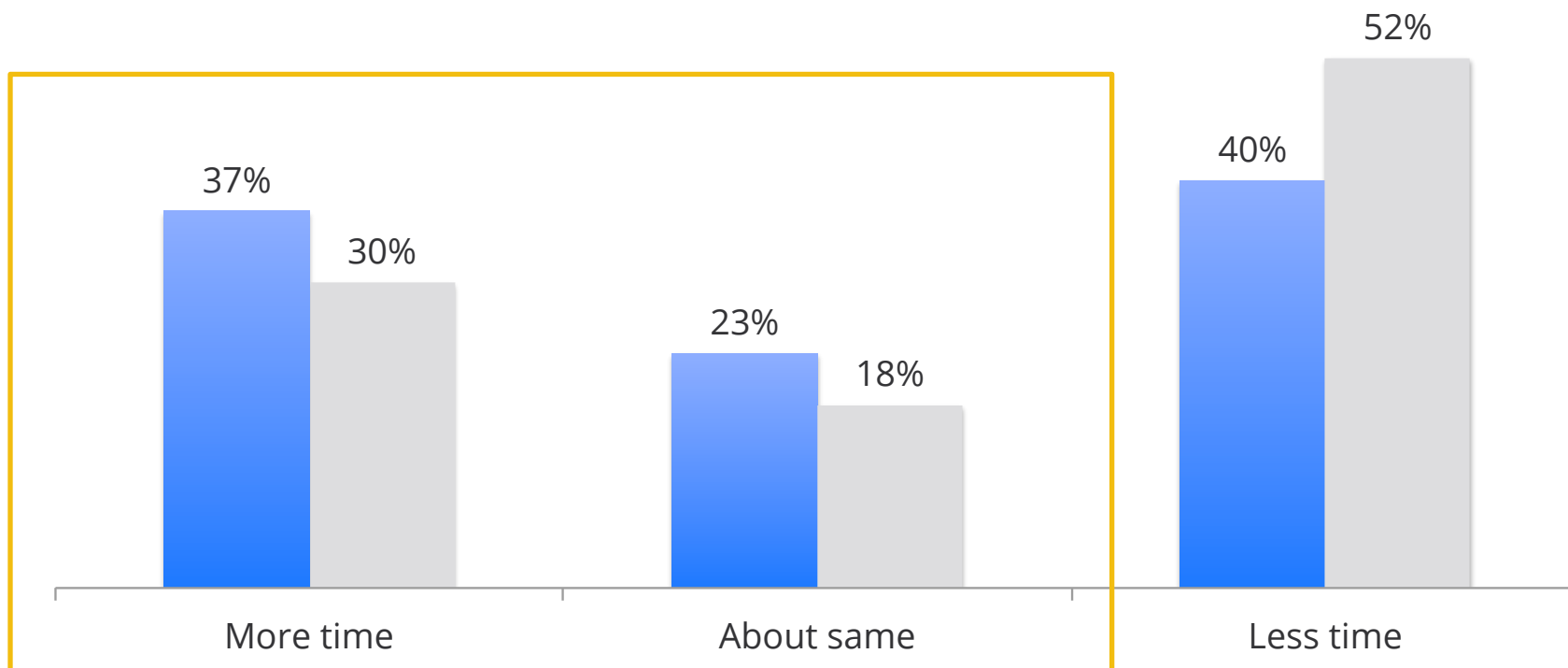
OV1 Which of the following online video websites (e.g., YouTube, Yahoo! Video, Hulu) do you use to watch online videos (including all online content such as videos, shows, movies, etc.)? Please select all that apply. OV4 Why do you watch videos (including all online content such as videos, shows, movies, etc.) on online video websites (such as YouTube, Yahoo! Video, Hulu)? Is it to... (Select all that apply) OV5 Have you ever taken any of the following actions as a result of viewing videos (including all online content such as videos, shows, movies, etc.) on online video websites (such as YouTube, Yahoo! Video, Hulu)?



Most Guys Watch about the Same or More Online Video than TV

How much time do you spend watching online videos, compared to watching TV?

■ Percentage young males ■ General Population



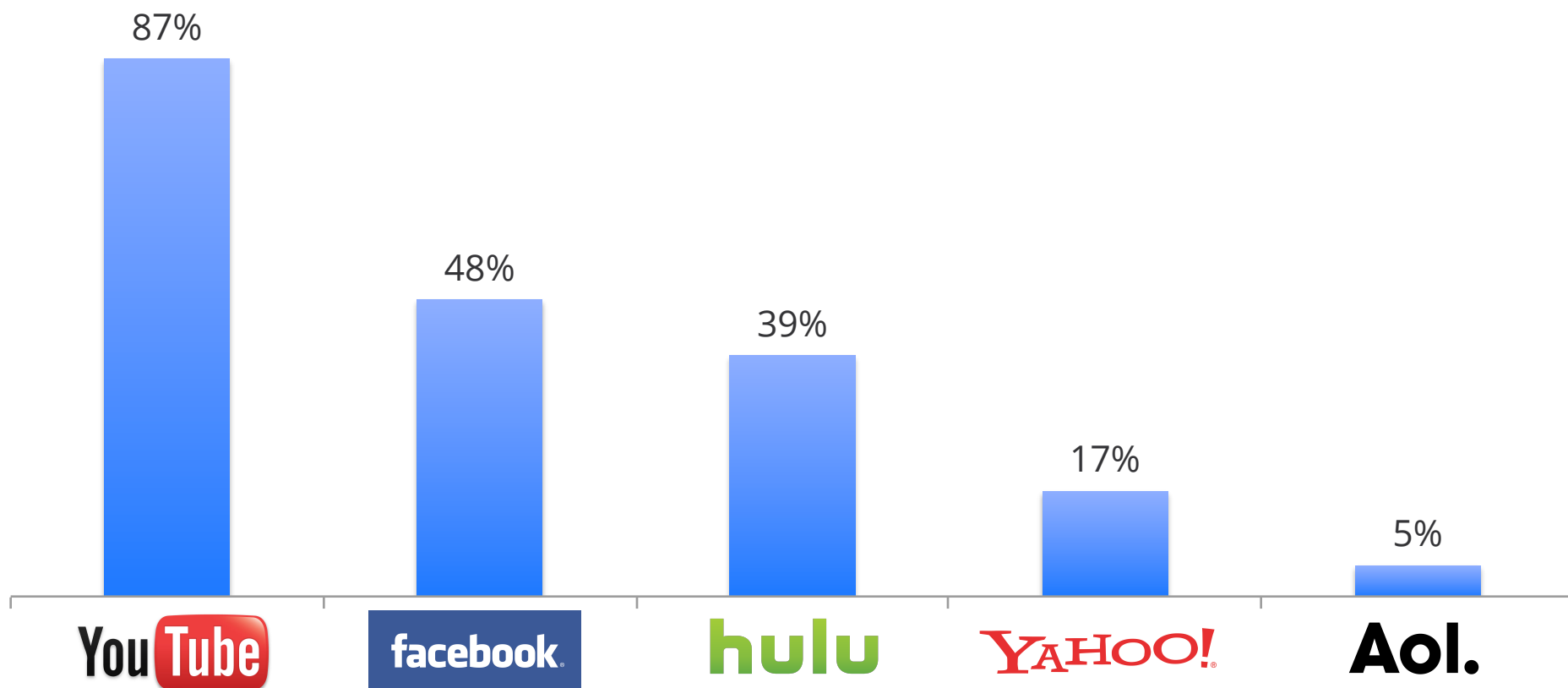
Source: Google Ipsos OTX Young Males Study, US, May 2012

OV3 In general, thinking about the time you spend watching online videos (including all online content such as videos, shows, movies, etc.), which of the following are true for you? (Select one)



Guys Prefer YouTube for Online Video

■ Percentage young males who use online video website



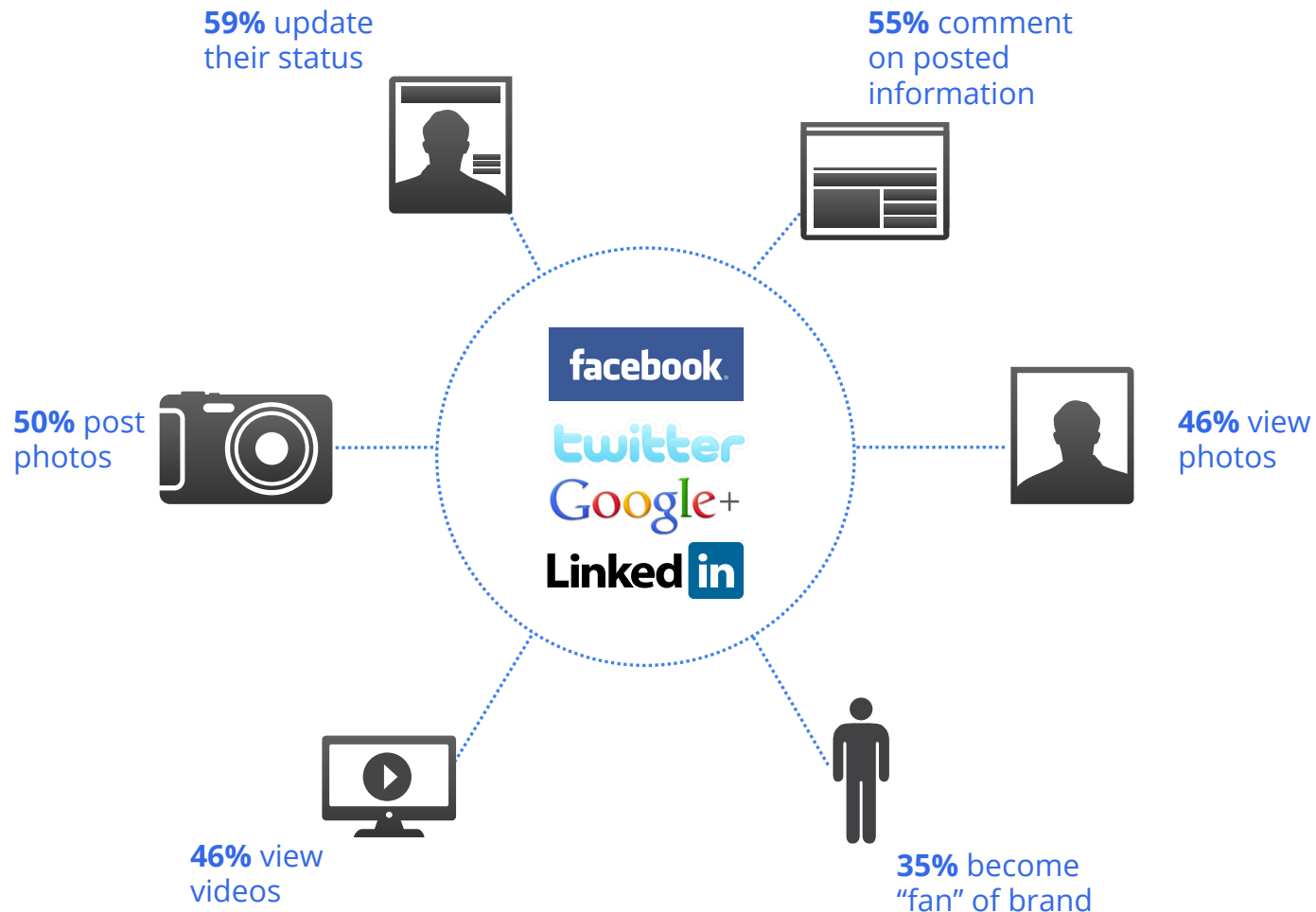
Source: Google Ipsos OTX Young Males Study, US, May 2012

OV1 Which of the following online video websites (e.g., YouTube, Yahoo! Video, Hulu) do you use to watch online videos (including all online content such as videos, shows, movies, etc.)? Please select all that apply.



Guys are More Likely to Use Social Networks

88% of young males use a social network vs 81% of the general population



Source: Google Ipsos OTX Young Males Study, US, May 2012

SN1 Which of the following social networking sites (like Facebook, Google+, MySpace, etc) do you use/are you currently a member of? Please select all that apply



Guys are Always Mobile

■ Percentage young males who use device regularly ■ General population

64%

41%

40%

28%

22%

14%

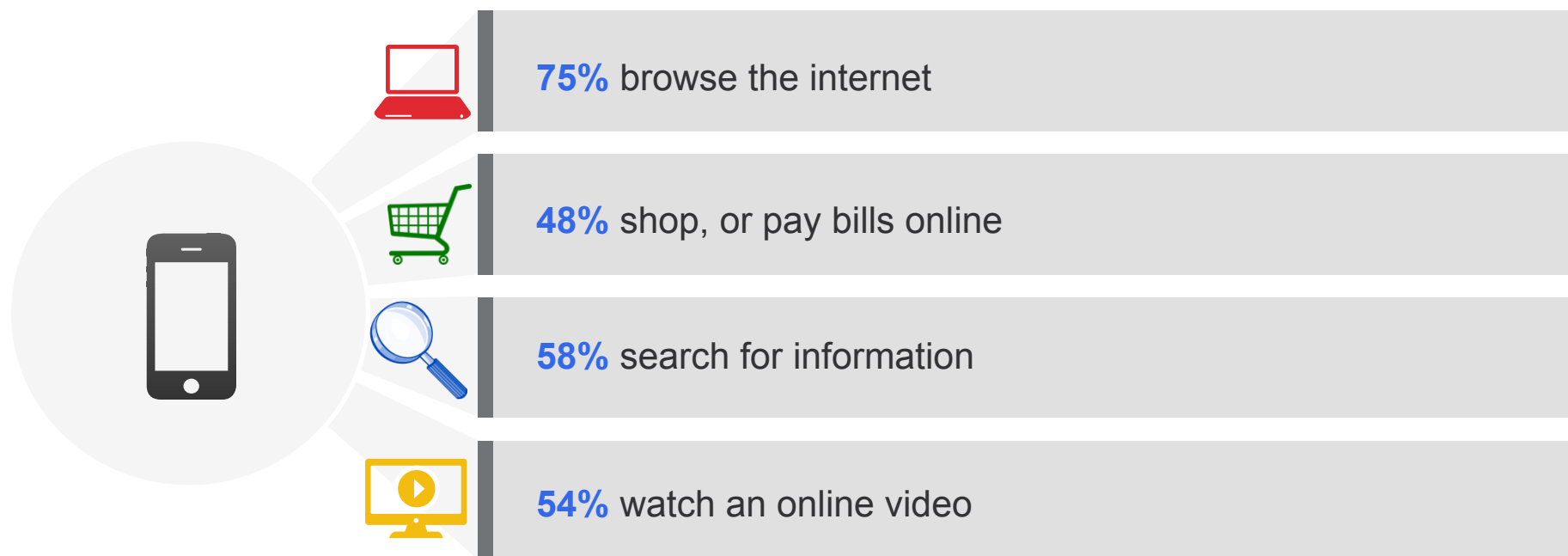
Smartphone

Basic mobile phone

Tablet

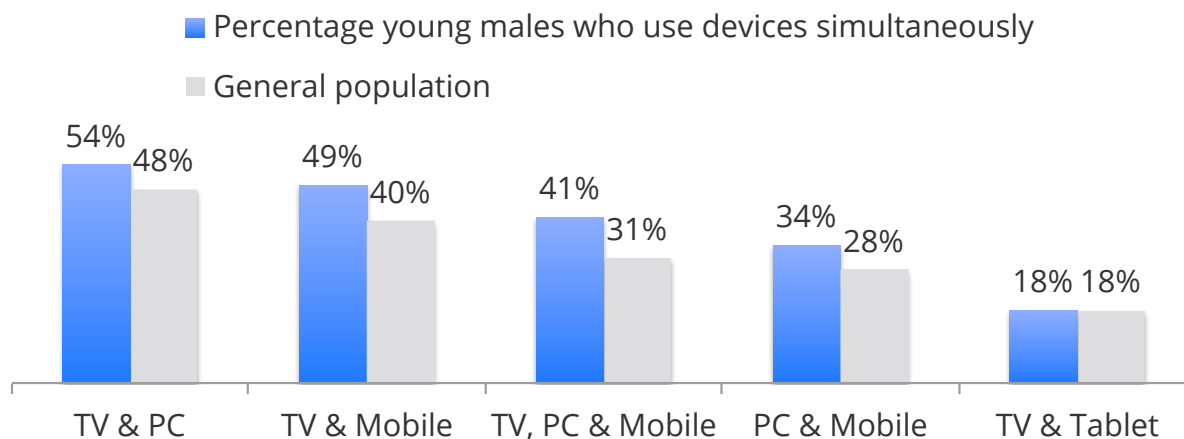


Guys are Constantly Connected





And Moving from Screen to Screen All the Time



Multi-tasking young males browse across multiple platforms simultaneously, and **74% of young males** say they **use multiple devices to shop**

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