

The path to purchase for TVs: digital's growing impact on Aussies' small-screen research

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When Aussies are ready to buy a new TV, brand names take a backseat to the best deal. Here, we explore new research with TNS Australia to help TV retailers and manufacturers better understand Aussie consumers' behaviour and ensure they're considered in key moments on the path to purchase.

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In 1964, 20th Century Fox magnate Darryl Zanuck boldly predicted that “people will soon get tired of staring at a plywood box every night.” Fast-forward 60 years, and it’s clear that Mr. Zanuck couldn’t have been more wrong. With the growing popularity of Smart TVs and streaming video on demand services, TVs still sit front and centre in living rooms across Australia.

Digital and mobile technology have transformed both the TV-watching experience and the TV purchase journey. Most consumers today prefer to bounce between devices and channels to research and compare their options, creating hundreds of valuable intent-driven moments for brands to stand out online and get noticed.

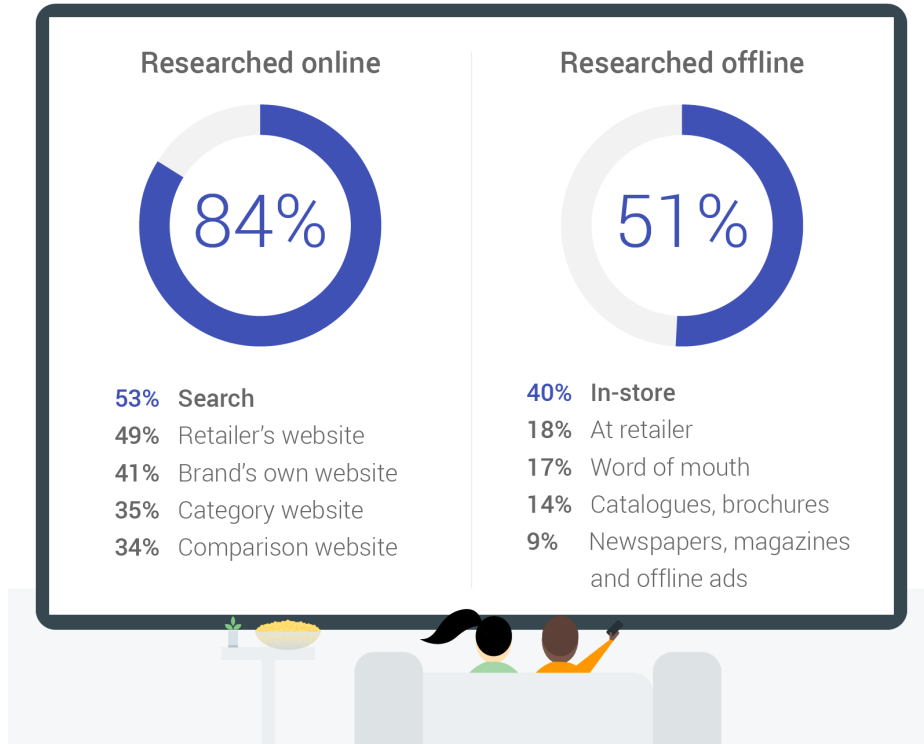
To better understand the research behaviour of people in the market for a new TV, we partnered with TNS Australia for a quantitative and qualitative study that explores the path to purchase for 500 Aussie consumers.¹ Here, we break down three key takeaways that manufacturers (OEMs) and retailers can use to show up and stand out along the way.

1. Aussies take their time researching new TVs—mainly online

TVs have come a long way from five channels and rabbit-ear antennae. With so many new models and high-tech features to choose from, Aussies spend a lot of time doing research—nearly half (49%) of consumers said they started researching options a week or more before their final purchase. A large majority (84%) conducted their research online, with search engines and retailer and brand websites as the most commonly used touchpoints.



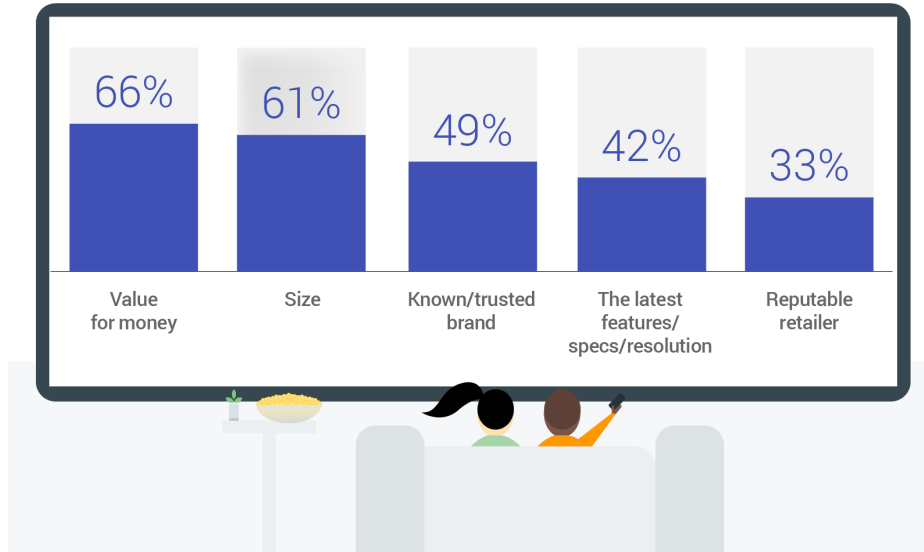
Top touchpoints in TV research



Because TVs are such a high-value investment, it's not too surprising that Aussies say value for money and screen size are two of the most important features when they're deciding on a new model.



Top features when deciding on a TV



Key takeaway

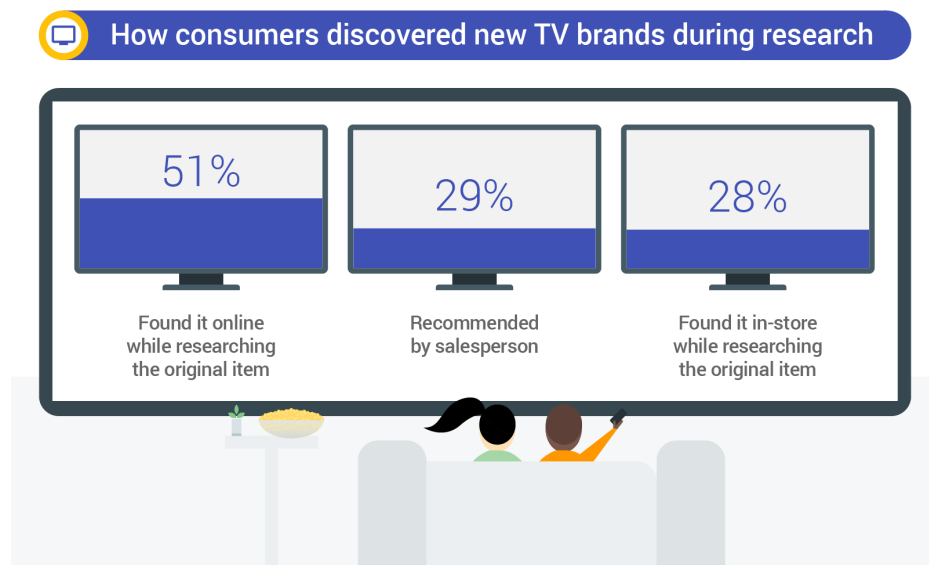
It's critical for both retailers and OEMs to be present from the first moments that Aussies start shopping for a new TV. Showing up online with detailed product information is a great way for OEMs to showcase unique and relevant product features, and retailers should focus on filling their websites with similar information and comparison capabilities to help Aussies find the best deal.

2. Aussies are more open-minded than brand-loyal

As shown above, Aussies care more about finding the best deal than buying a particular brand. In fact, only 22% of consumers in our study were absolutely certain of their brand of choice when they started their research, and just one in five purchased the same brand they initially planned to.

Our search data tells the same story. In 2017, only 28% of TV-related searches contained a brand name, compared with 95% of mobile phone-related searches.²

That's why the online space has become such a fiercely competitive battleground for TV brands. Thirty-seven percent of consumers said they discovered new brands during research, and just over half of that group said they found a new brand online while researching the TV they're upgrading or replacing.



Key takeaway

Simply being present early on the path to purchase is important, but the online research phase is also a crucial time for OEMs and retailers to break from the pack. Make sure that each TV model's unique advantages and features are easy for anyone—not just new customers—to discover and compare online because Aussies' loyalty can go right out the window if they find a better deal from another brand.

3. Aussies still prefer to buy their TVs in-store

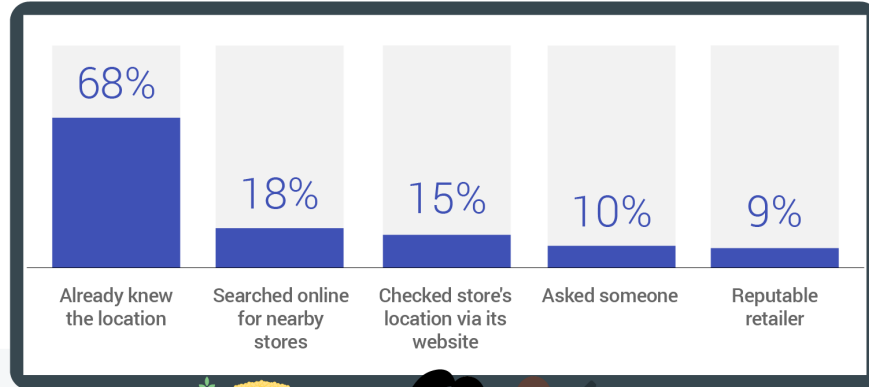
While consumers' most crucial decision-making takes place online, buying a TV is still largely an offline experience (similar to what we found in our [mobile phone research](#)). After researching online, nearly 80% of consumers visited a store to make their final purchases primarily because they wanted to physically see the TV and interact with the staff in person.



Visiting a store also gives Aussies a chance to negotiate for a better price or check for sales that aren't available online—49% of consumers said that in-store promotions were the most important information they look for, followed by knowledgeable staff (45%) and price matching (43%). While the majority of consumers said they already knew where they'd buy their TV, nearly one in five searched online for stores nearby, and 15% used a store's website to check for locations.



How consumers discovered the stores they visited



However, just because consumers are in the store doesn't mean their minds are made up. Mobile has given consumers the ability to read reviews and compare prices and brands right up until the point of sale, and 52% of Aussies said they used their smartphones in-store to do just that.



Reasons for using a smartphone during an in-store visit



Key takeaway

Retailers should make it easy for consumers to interact with different products as much as possible. For example, in-store features like staged living rooms allow consumers to experience what the TV will look and sound like in their own homes. It's also important to reassure in-store customers with price matching and provide detailed product information and reviews via signage and helpful staff so consumers don't feel the need to use their smartphones in-store.

Retailers can also provide a frictionless online-to-offline experience by making their store locations and available inventory easily discoverable online so Aussies can see what's in stock before they visit a store.

Don't overlook digital's impact on Aussies' TV purchases

The evolution of Aussie consumers' research behaviour has proven to be a game-changer for TV brands. Catalogues and flyers used to be the best way to get in front of customers and drive them to nearby stores. Now, digital not only gives TV OEMs and retailers hundreds of opportunities to reach new and existing customers but also a way to seamlessly connect their online research with a helpful in-store visit.

Methodology

Google partnered with TNS Australia to conduct quantitative and qualitative research to explore the path to purchase for TVs (where consumers look for information, where they purchase, their brand loyalty, etc.).

We spoke to 500 Australian consumers aged 18-60 years old who bought a TV in the last six months prior to the survey.

Source

- 1 Google/TNS, "Path to Purchase Research – TV," March 2017, Australia, n=500 Australian consumers aged 18–60 who bought a TV in the last six months.
- 2 Google Internal Data, Top 100 searches by query volume related to "Televisions" vs. "Mobile Phones," 2017, Australia.