



ZMOT Heat Maps by Industry

Sources used by shoppers in the decision making process within each industry

The intersection of when, what, and how much?

Google/Shopper Sciences
U.S., April 2011

Objectives

How is **shopper behavior** changing in a digitally powered world?

What **role** do **new media** like social & mobile in shopping?

How are shoppers' expectations of the **physical retail store** changing?

How does **pre-shopping** change actual purchasing?

Methodology

Online shopper surveys with interactive game-like construct

Fielded in March 2011 in the US

The results depicted in a heat map to be able to convey the intersection of three variables

Connect as close to purchase decision as possible

N=5,000 Shoppers:

- 500 each in Auto, Tech, Travel, Voters, Restaurant, OTC Health, CPG Grocery, CPG Beauty/Personal Care
- 250 each in Credit Cards, Banking, Insurance, Investments



3 Key Shopper Questions:

When? Purchase Timeline

How far in advance do shoppers start thinking about their purchase?

What? Source Usage

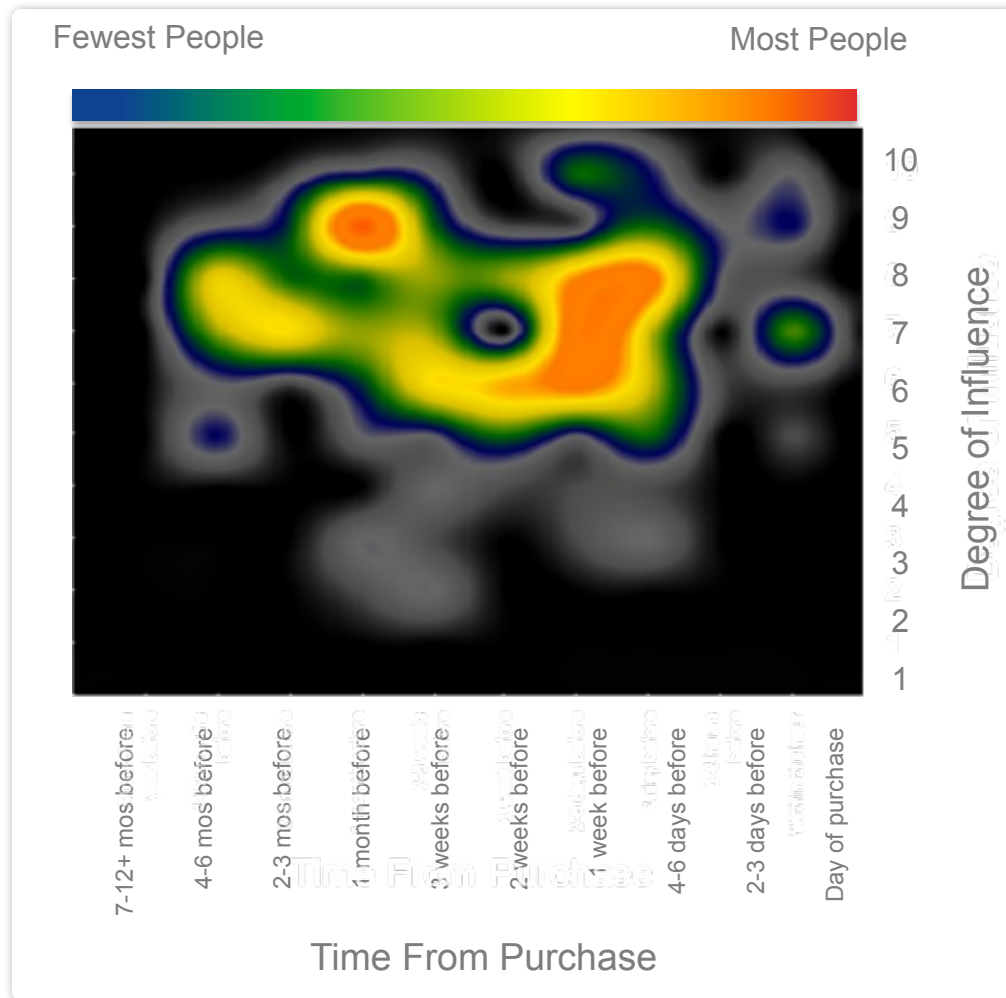
What traditional and new media sources did shoppers use to help them decide on their purchases?

How Much? Influence

How influential were each of the sources in the ultimate decision making?

How to read the Heat Maps

Example: Used a Search Engine



What's the role of search engines to shoppers?

- When do shoppers use search engines in the purchase timeline?

HOW TO: Look at where the bright dots are lined up against the timeline on the x-axis. The brighter the dot – the more people that do this action at that time.

- *Finding:* a great deal of search happens 4-6 months before purchase, but shoppers will visit 2-3 days prior to check.
- How influential do shoppers find the information they find through search engines?

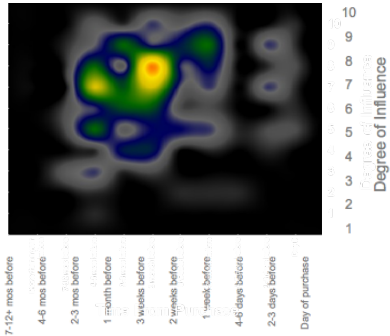
HOW TO: Look at where the brightest dots are lined up against y-axis for degree of influence. The higher the placement, the more influential the source.

- *Finding:* Search is very influential between 6-10

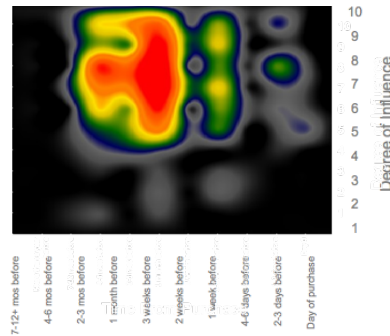
Voters

Fewest People

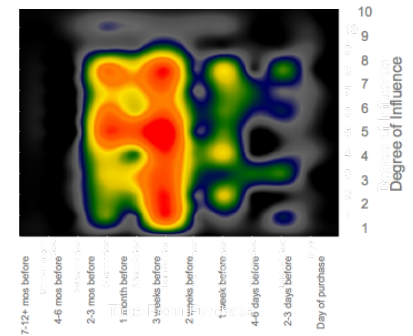
Most People



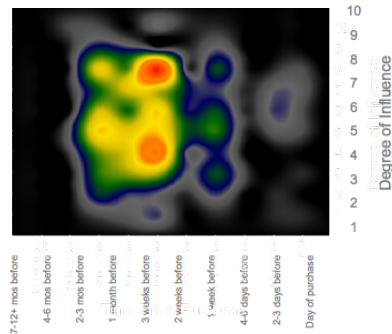
Time From Purchase
**Searched online/
Used a search engine**



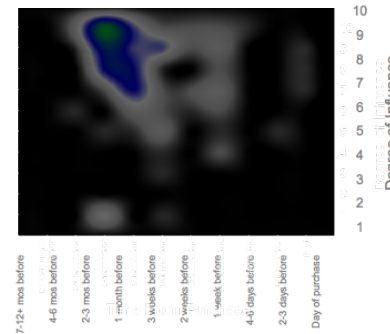
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**



Time From Purchase
**Talked with candidate/
Candidate
representative in
person**

think
with Google

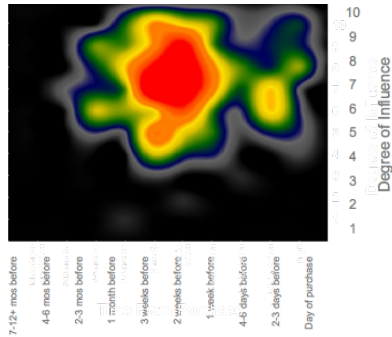
Source: Google/Shopper Sciences, Zero Moment of Macro Study, Apr 2011
N = 5,000 www.google.com/think/insights

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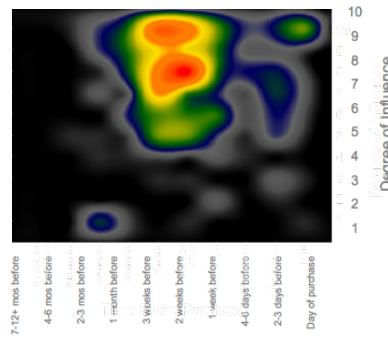
Travel

Fewest People

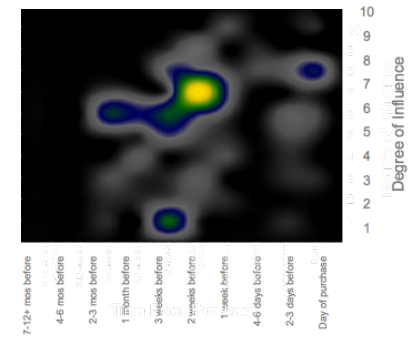
Most People



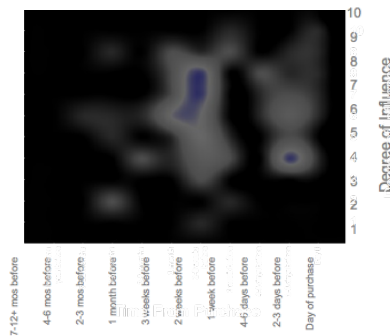
Time From Purchase
**Searched online/
Used a search engine**



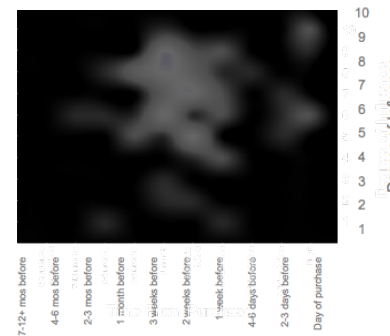
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**

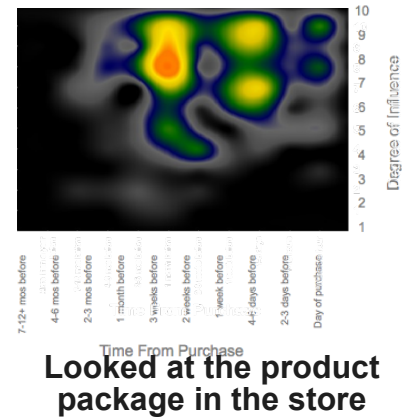
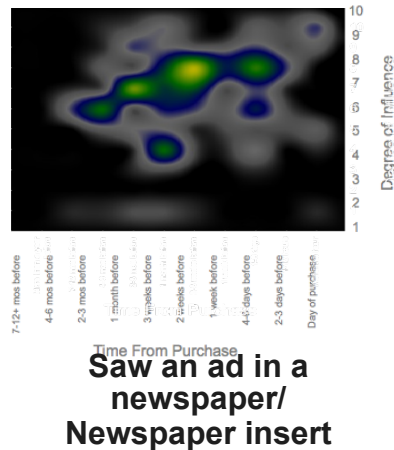
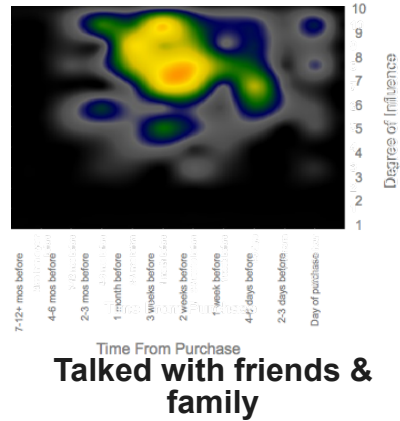
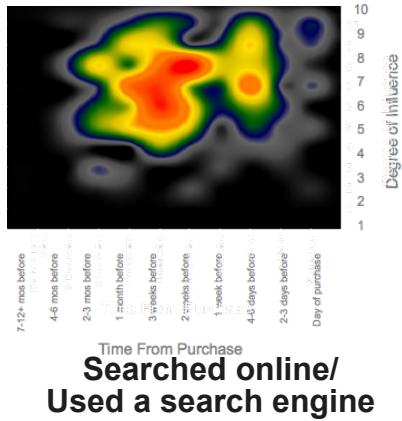


Time From Purchase
**Looked at the travel
details in the
travel office**

Tech

Fewest People

Most People



think
with Google

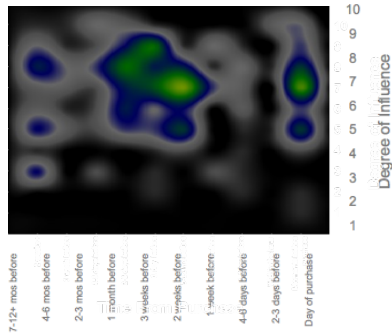
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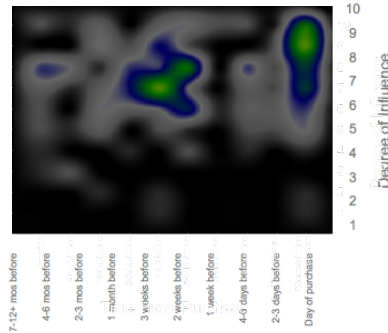
OTC Health

Fewest People

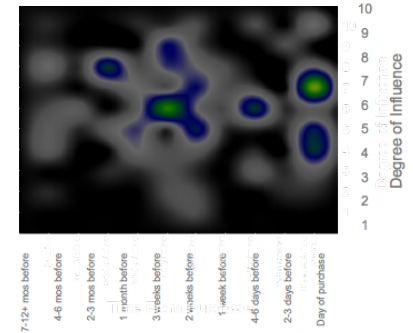
Most People



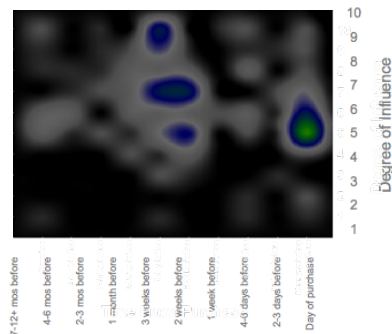
Time From Purchase
**Searched online/
Used a search engine**



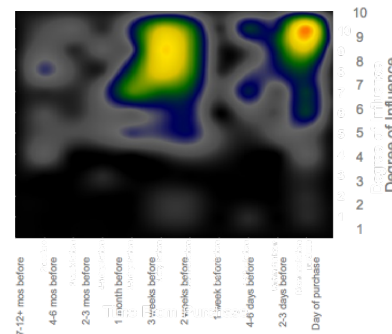
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**



Time From Purchase
**Looked at the product
package in the store**

think
with Google

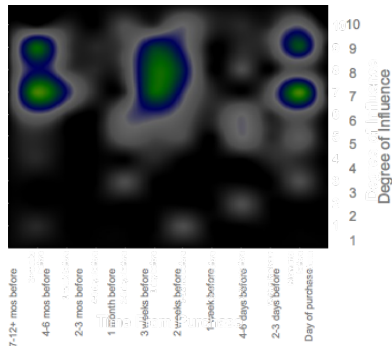
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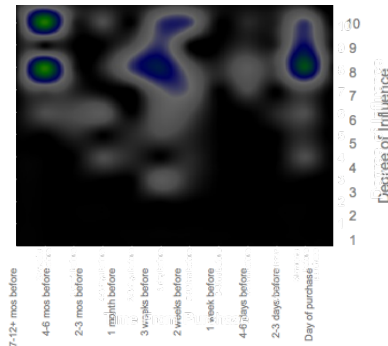
CPG Beauty/Personal Care

Fewest People

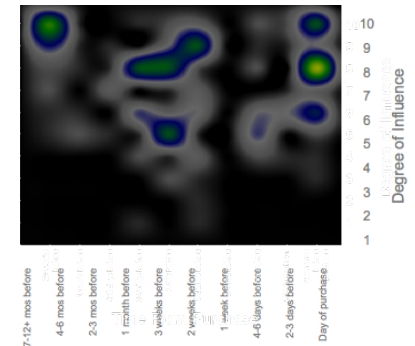
Most People



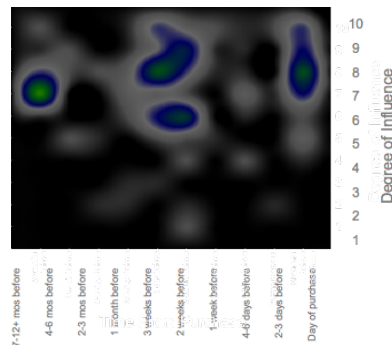
Time From Purchase
**Searched online/
Used a search engine**



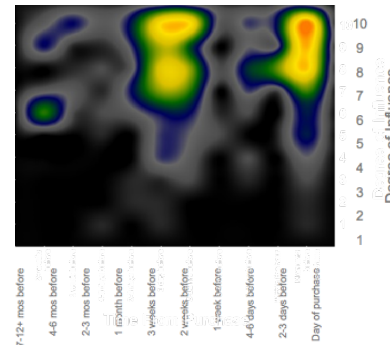
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**



Time From Purchase
**Looked at the product
package in the store**

think
with Google

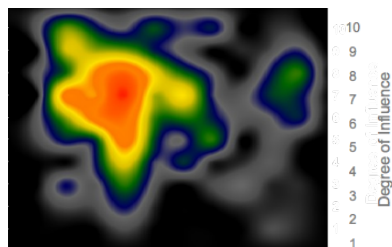
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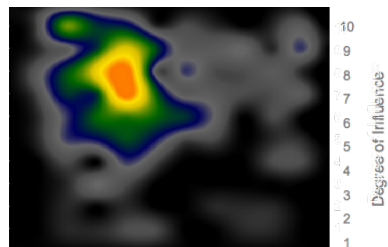
Automotive

Fewest People

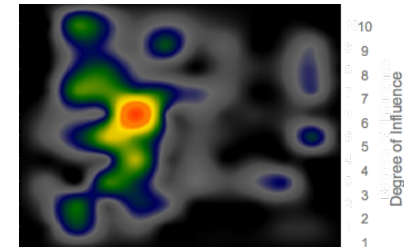
Most People



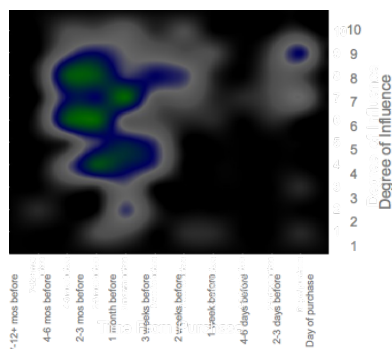
Time From Purchase
**Searched online/
Used a search engine**



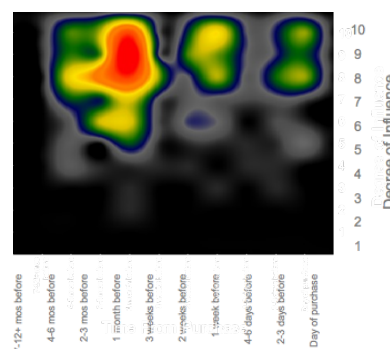
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**



Time From Purchase
**Looked at the
automobiles at the
dealership**

think
with Google

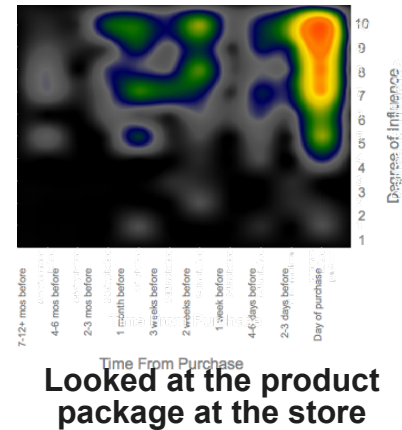
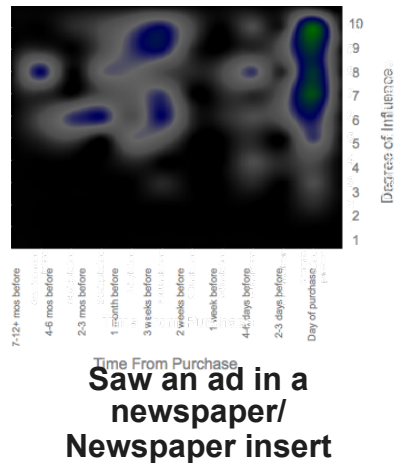
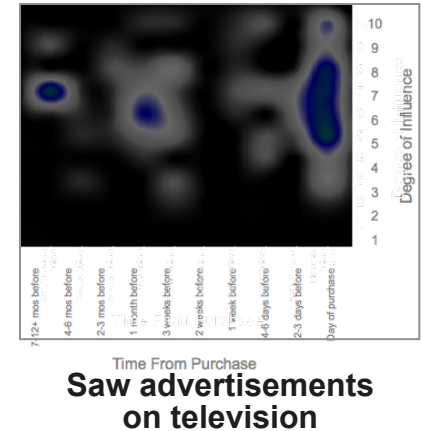
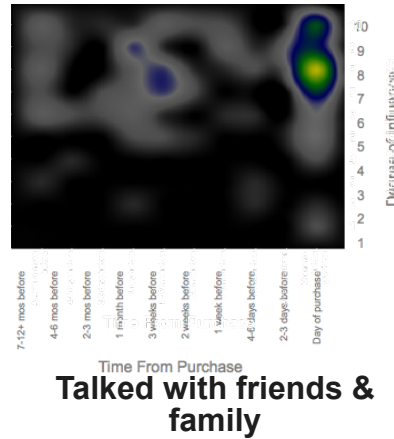
Source: Google/Shopper Sciences, Zero Moment of Macro Study, Apr 2011
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CPG Grocery

Fewest People

Most People



think
with Google

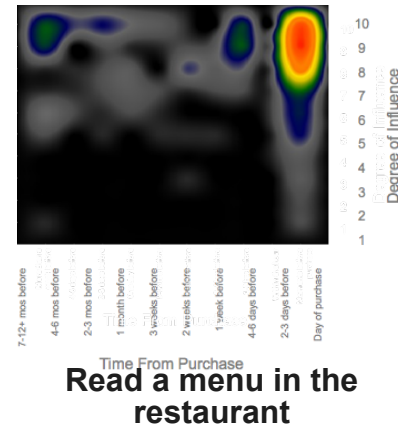
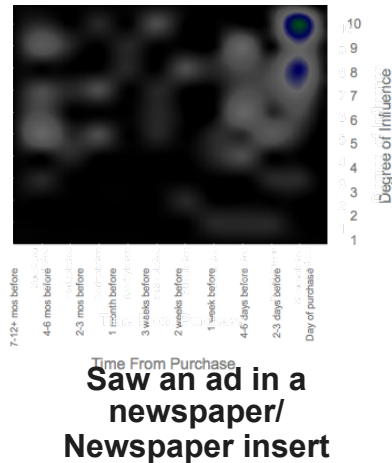
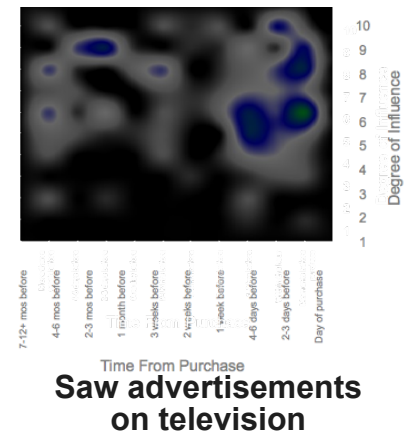
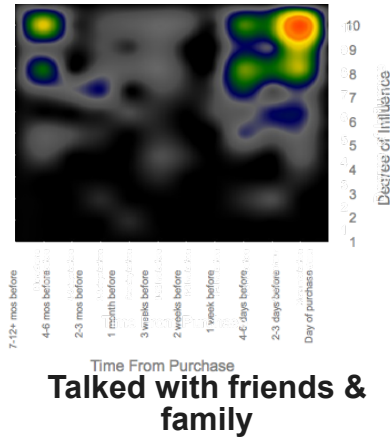
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Restaurant

Fewest People

Most People



think
with Google

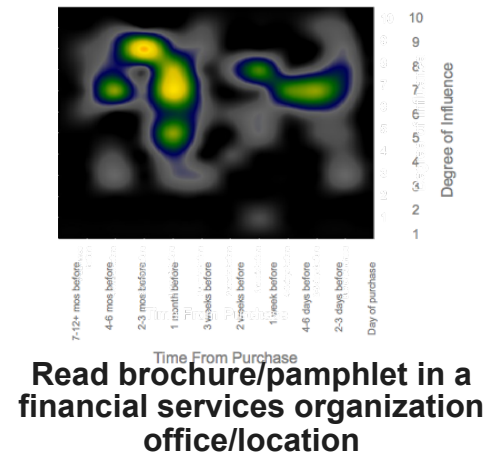
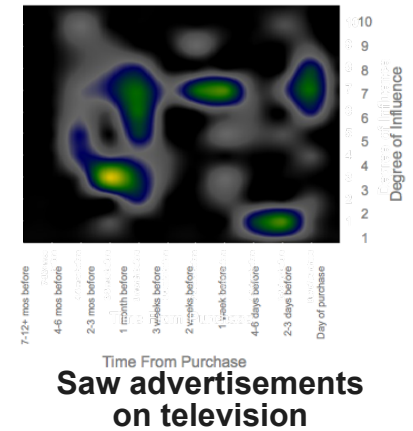
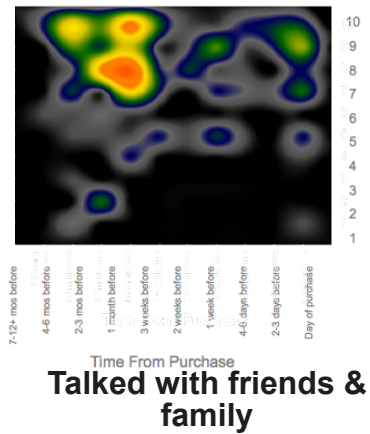
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N = 5,000 www.google.com/think/insights

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Banking

Fewest People

Most People



think
with Google

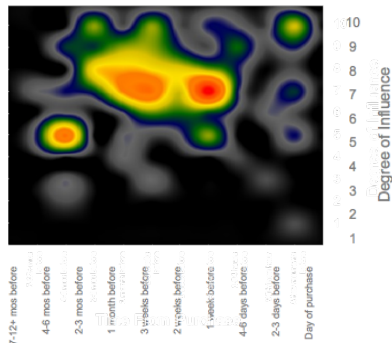
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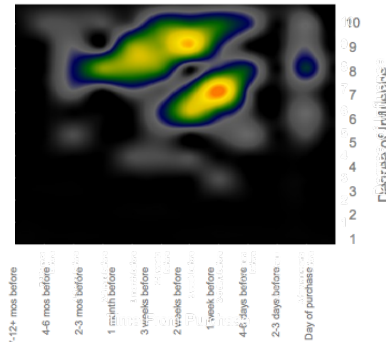
Credit Cards

Fewest People

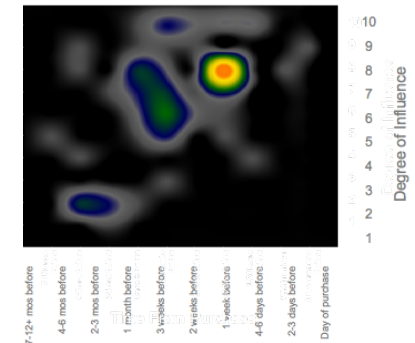
Most People



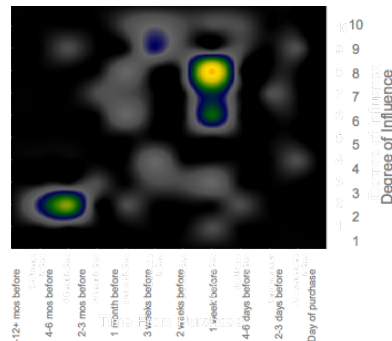
Time From Purchase
**Searched online/
Used a search engine**



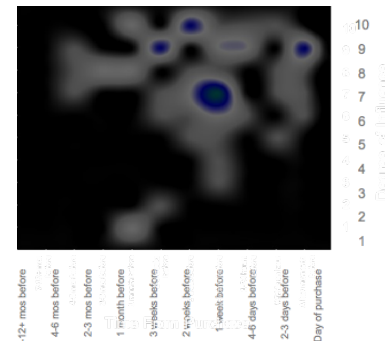
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**



Time From Purchase
**Read brochure/pamphlet in a credit
card company office/location**

think
with Google

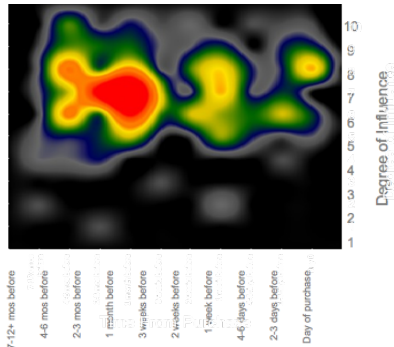
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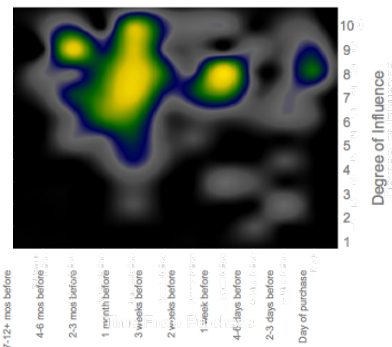
Insurance

Fewest People

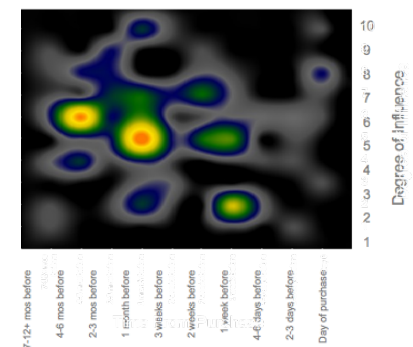
Most People



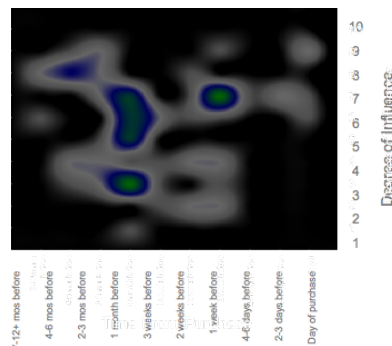
Time From Purchase
**Searched online/
Used a search engine**



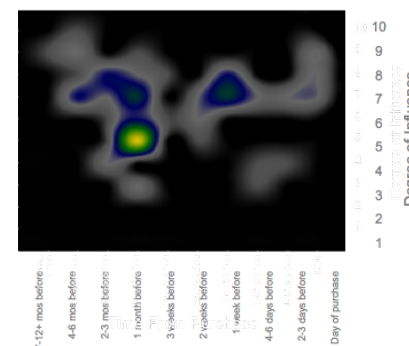
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**



Time From Purchase
**Read brochure/pamphlet in an
insurance company office/location**

think
with Google

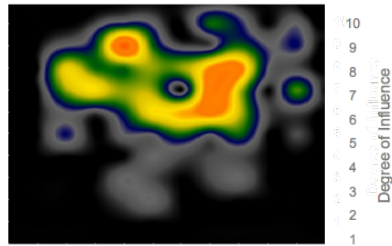
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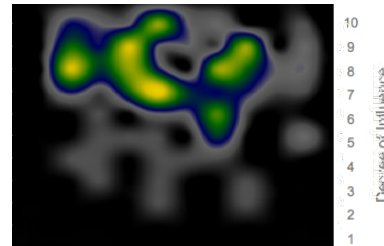
Investments

Fewest People

Most People



Time From Purchase
**Searched online/
Used a search engine**



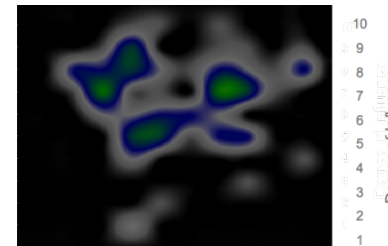
Time From Purchase
**Talked with friends &
family**



Time From Purchase
**Saw advertisements
on television**



Time From Purchase
**Saw an ad in a
newspaper/
Newspaper insert**



Time From Purchase
**Read brochure/pamphlet in a
financial services organization
office/location**

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with Google

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