



The Zero Moment of Truth Study – Consumer Electronics

Google/Shopper Sciences, U.S.
April 2011

Summary

- Personal technology products are a very considered purchase. Shoppers take several months or longer from when they decide to buy in the category to actual purchase.
- The average tech shopper uses more than 14 sources of information to arrive at their decision. Younger shoppers use over 21 sources.
- The vast majority – nearly 9 in 10 shoppers – engage in multiple ZMOT activities
 - Search, comparison website, brand and retailer websites are key information sources for shoppers
- Men are more likely to engage in mobile behaviors than women tech shoppers.
- Women tech shoppers are more likely to engage in digital post purchase behavior (like sharing online) than men.

Objectives & Methodology

How is **consumer electronic** purchasing changing in a digitally powered world?

What **role** do **new media** like social & mobile in driving consumers to purchase consumer electronics?

How effective are **traditional ads** at changing purchasing behavior?

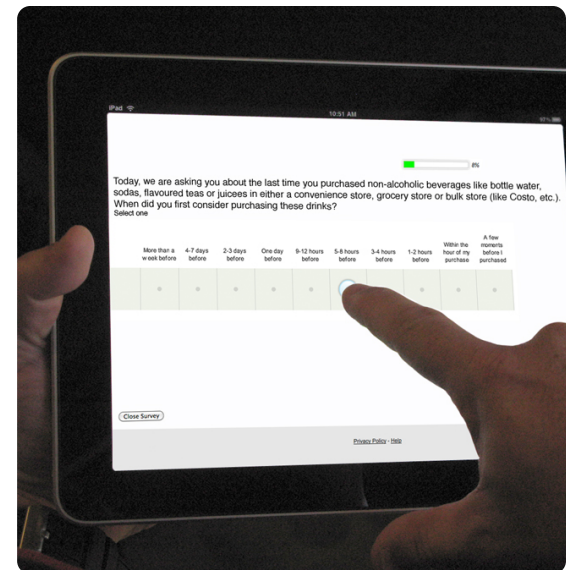
Online shopper surveys with interactive game-like construct

Fielded in March 2011 in the US

Adults who purchased a tech item in the past 2 months

(Examples provided include: digital camera, mp3 players, laptops, etc)

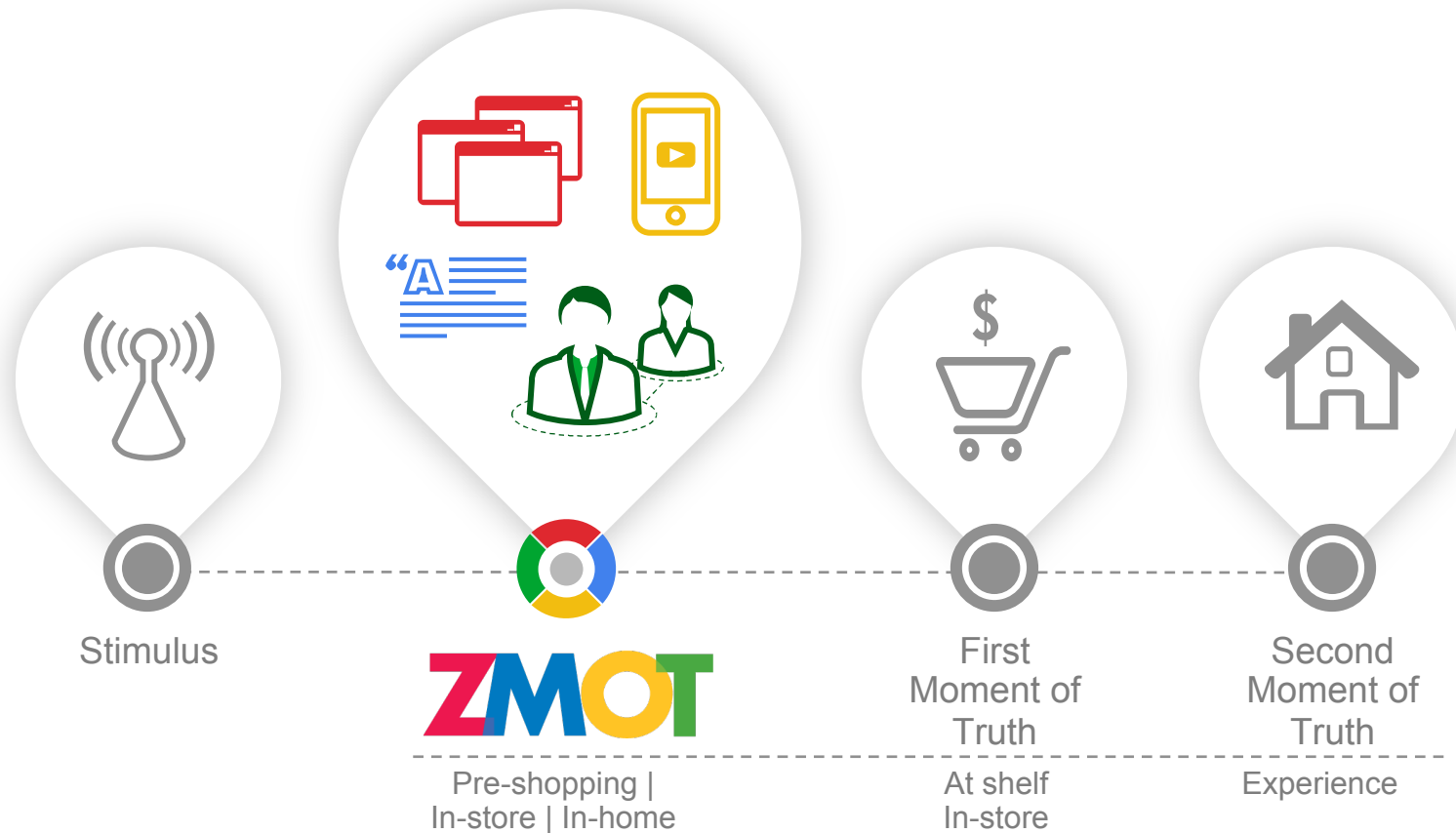
N=500 shoppers



Traditional 3-Step Mental Model of Marketing



The New Mental Model of Marketing



We asked tech shoppers...

When? Purchase Timeline

How far in advance do shoppers start thinking about their consumer electronic needs?

What? Source Usage

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

How? Influence

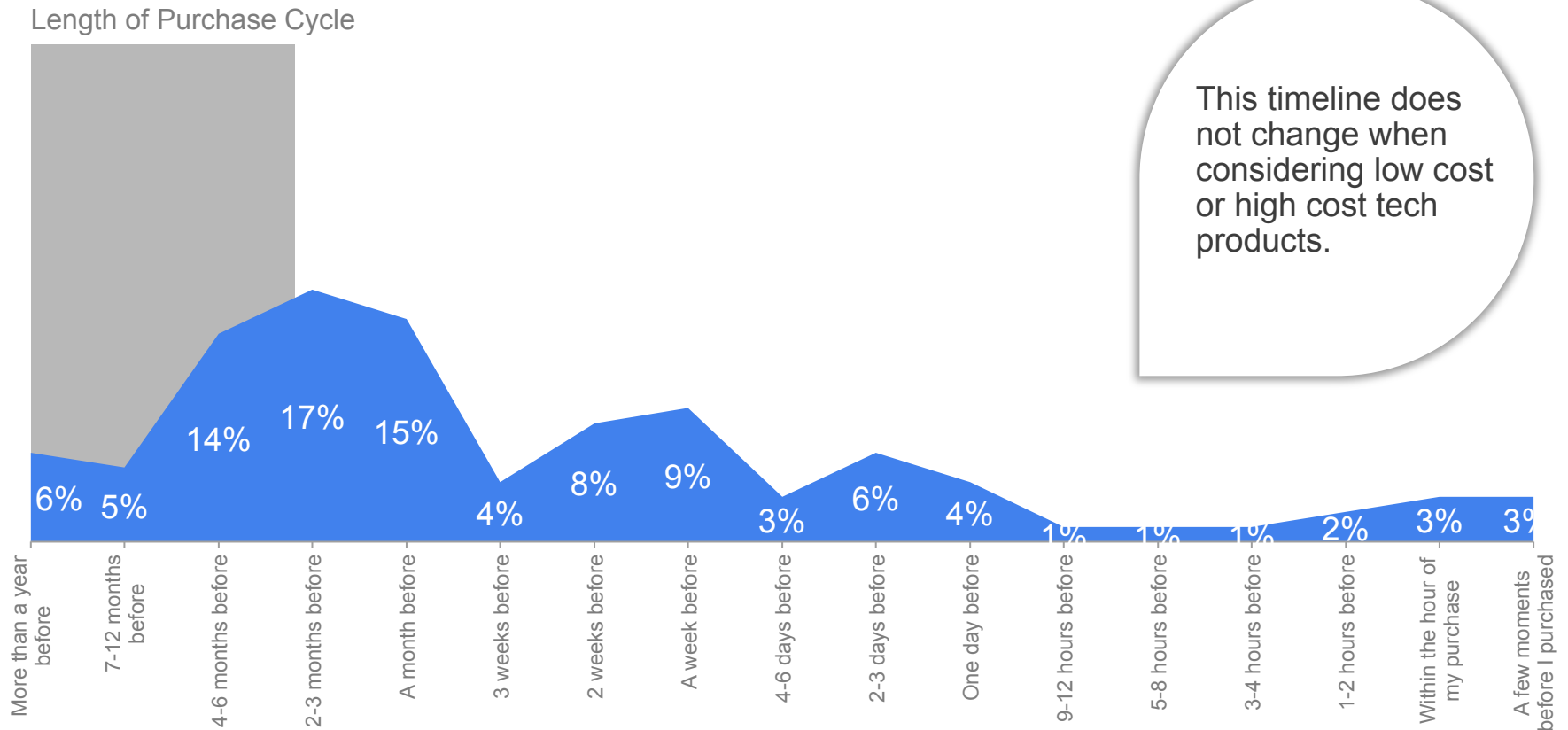
How influential were each of the sources in the ultimate decision making?

Why? Information-Seeking

Why did shoppers consult the internet? What information were they looking for related to their purchase?

The vast majority of shoppers view Tech as a considered purchase

More than half are taking a month or more to make their purchase decision and 1 in 5 are deciding within one to three weeks.



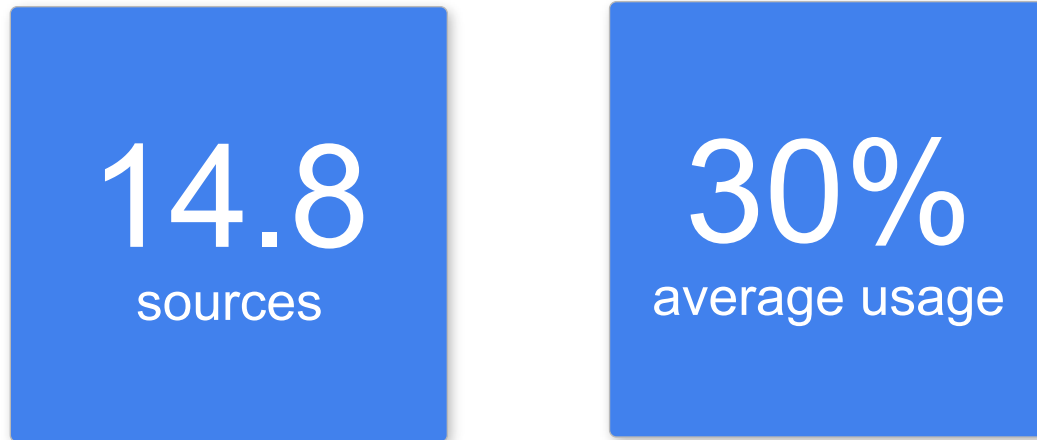
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Q1 Again, for the rest of this survey we would like to focus on the [PIPE IN FROM QS5] you recently purchased. First, in TOTAL, how long were you thinking about buying this consumer electronics product before you actually PURCHASED it (them)?

Base N=500

Source: Google/Shopper Sciences, Zero Moment of Truth Study – Tech, Apr 2011

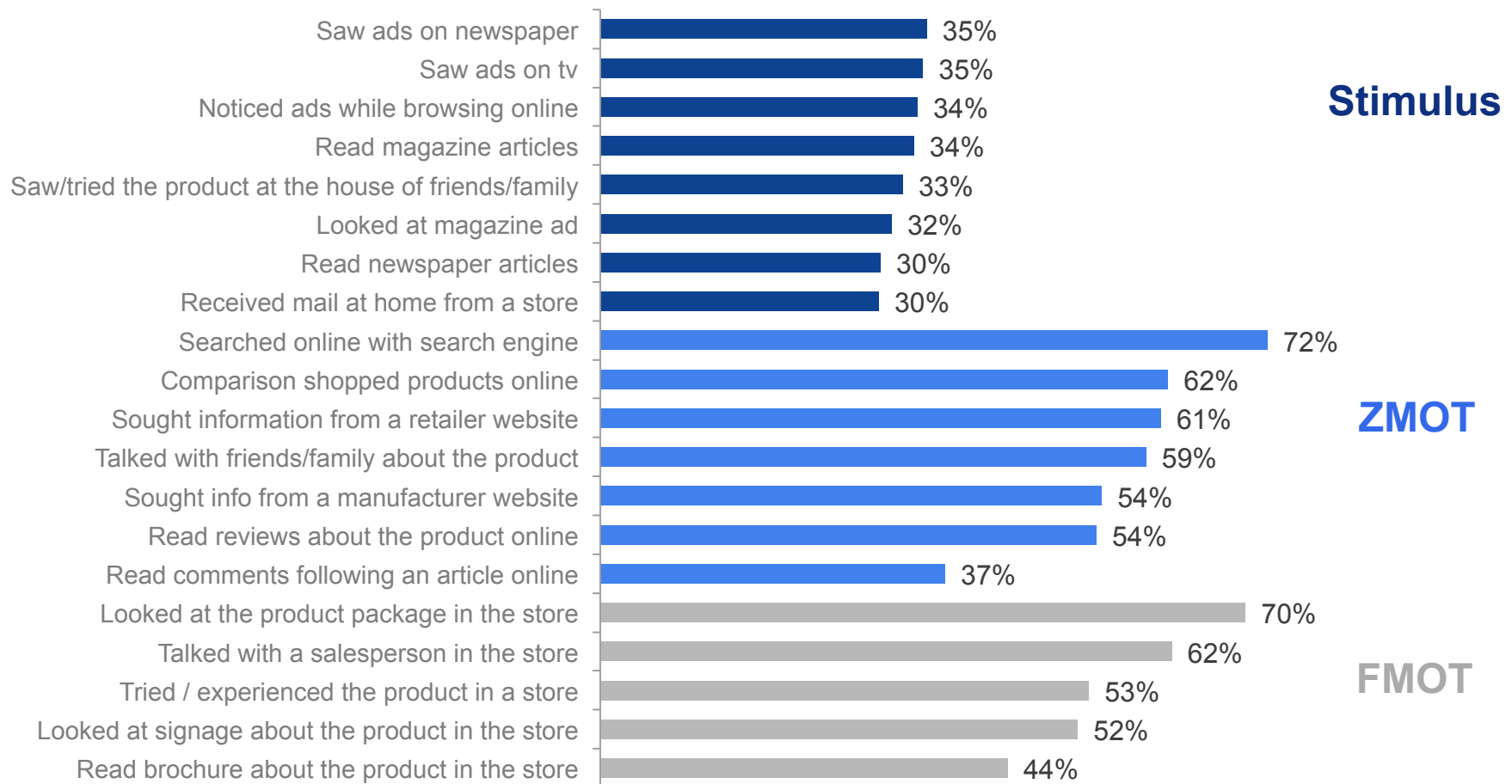
Tech shoppers used on average 14.8 sources of information to help them make their purchase decision



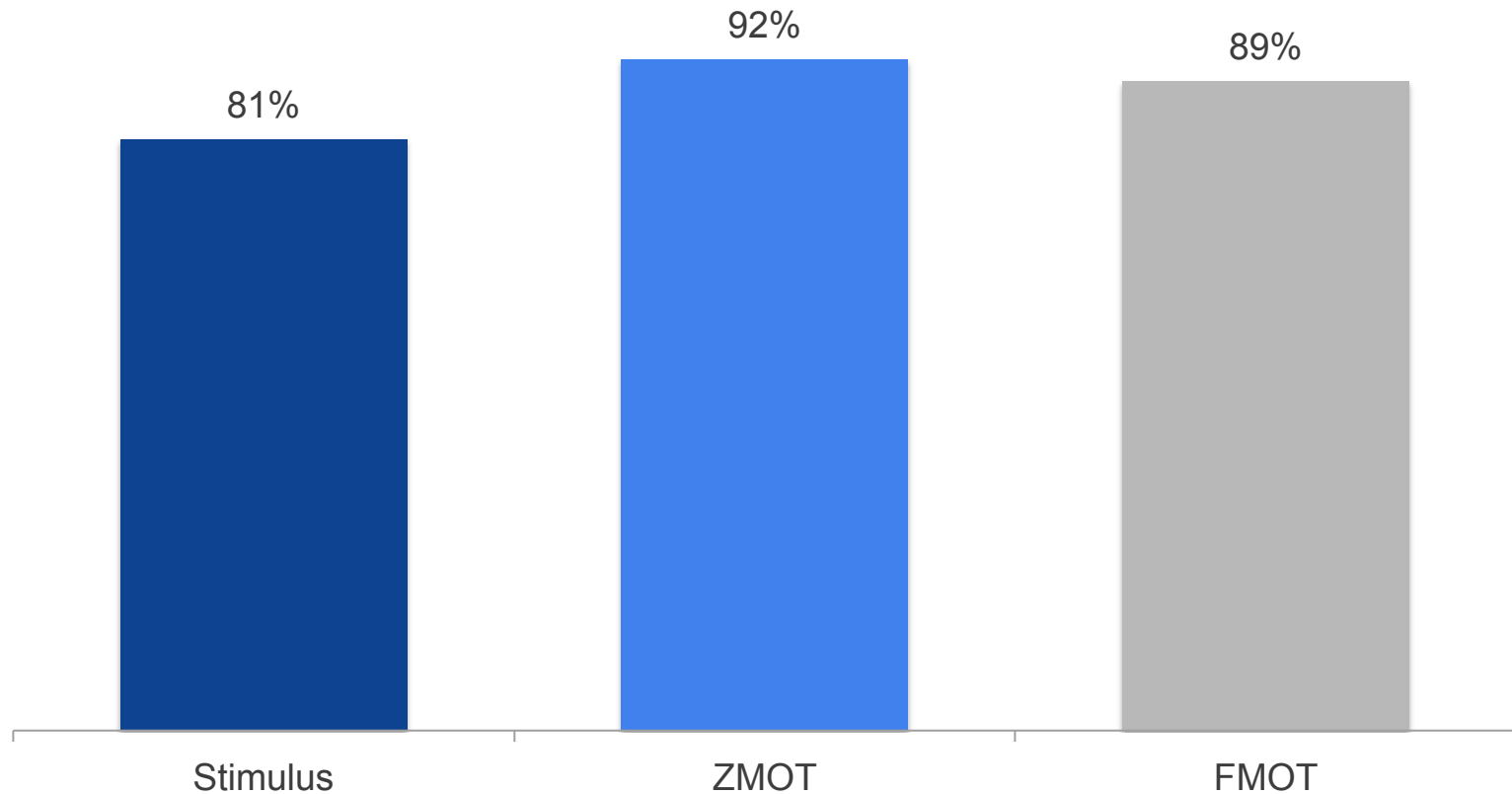
For any one source, on average 30% of shoppers used it.

Seven ZMOT sources scored well above the average usage rate, rivaling FMOT in this category.

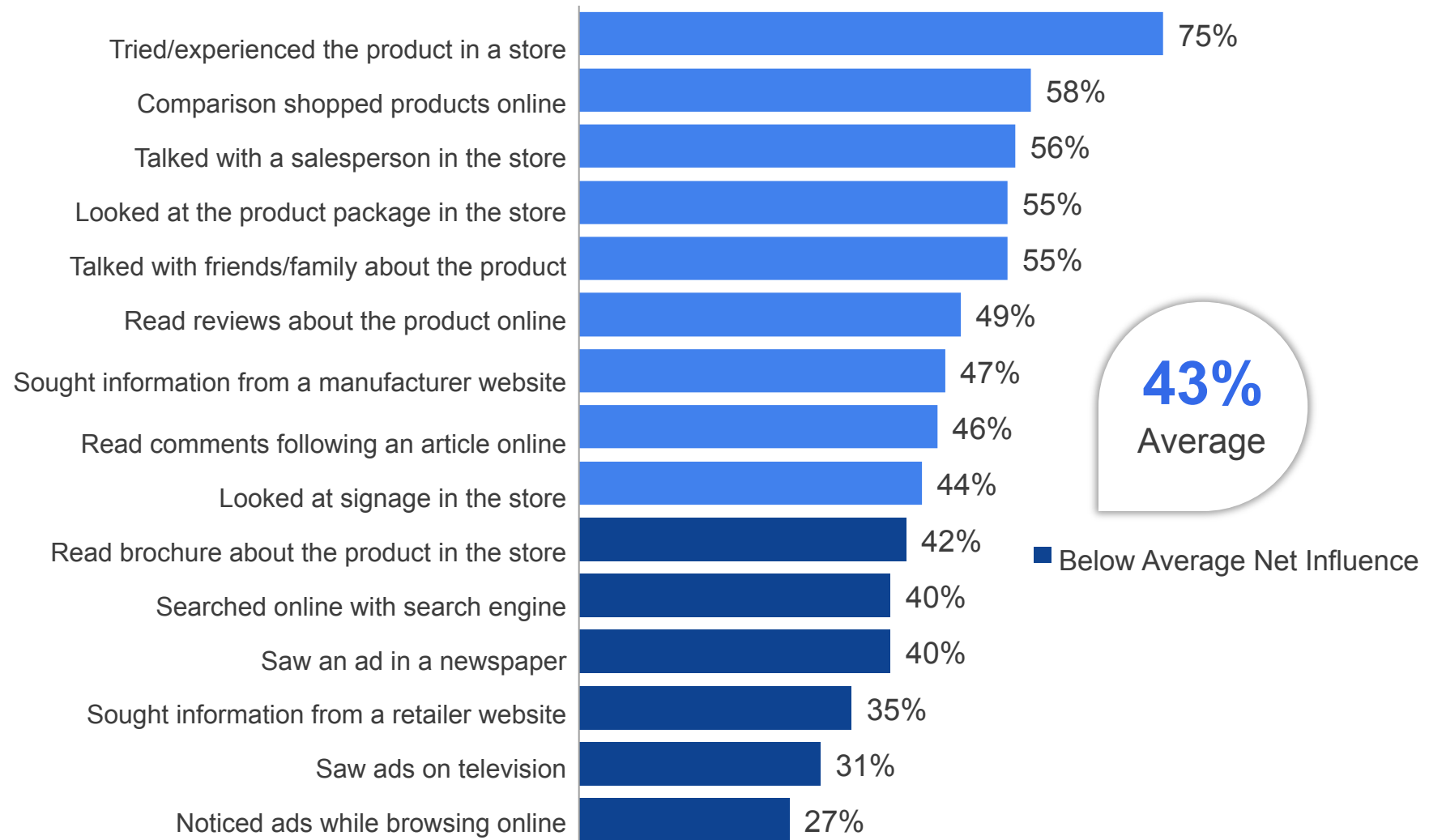
Sources Used – Above the 30% Average Usage Score



ZMOT sources are the most widely used.



Most Influential Sources for Tech Shoppers

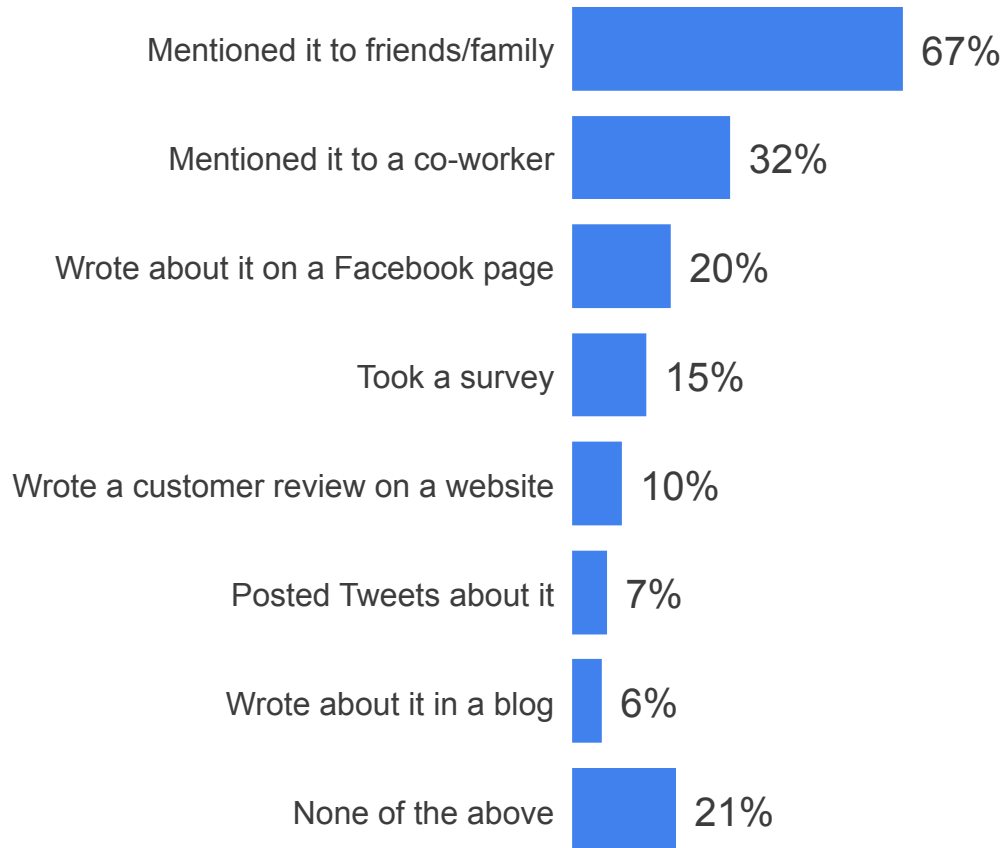


Top reasons for tech shoppers to consult the internet

Tactical internet behaviors – Above average shown



Post Purchase Behavior (SMOT)



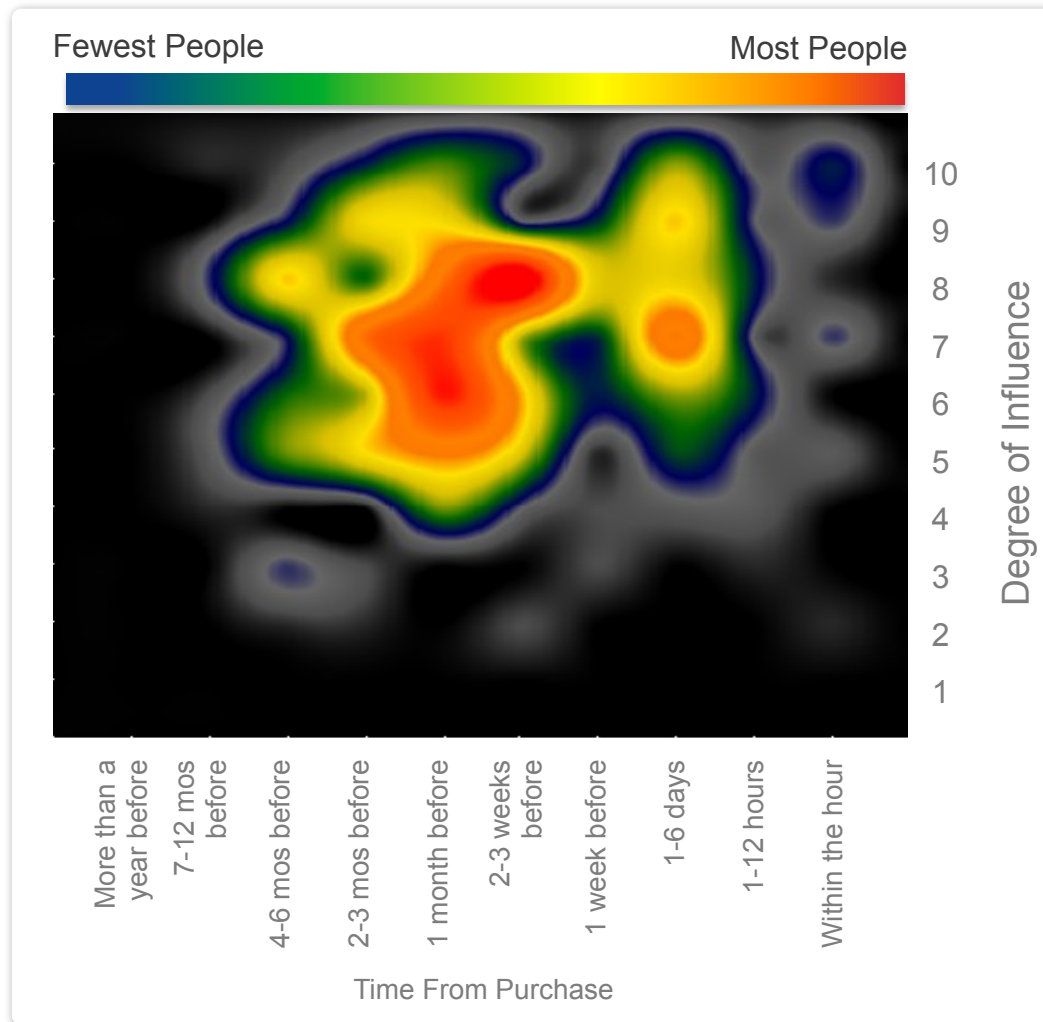
- Shoppers are talking about this purchase with high levels of SMOT participation.
- 38% of shoppers are engaging a digital sharing



Heat Maps

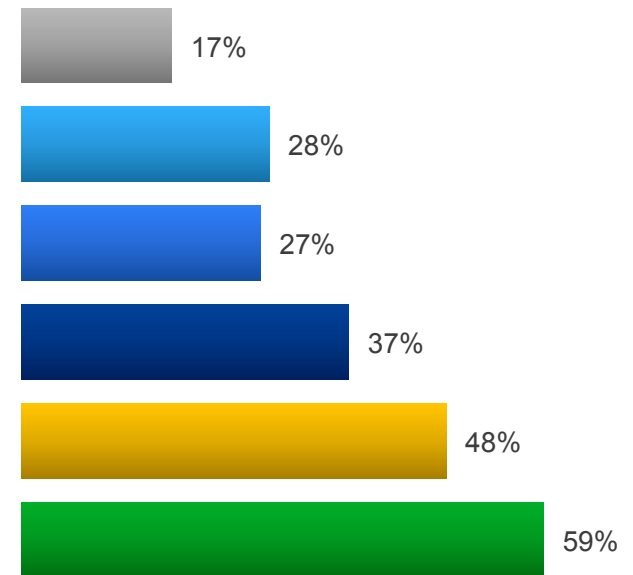
The intersection of when, what, how and why

Searched online with search engine



72% Usage **88%** Repeat Usage

Source Content



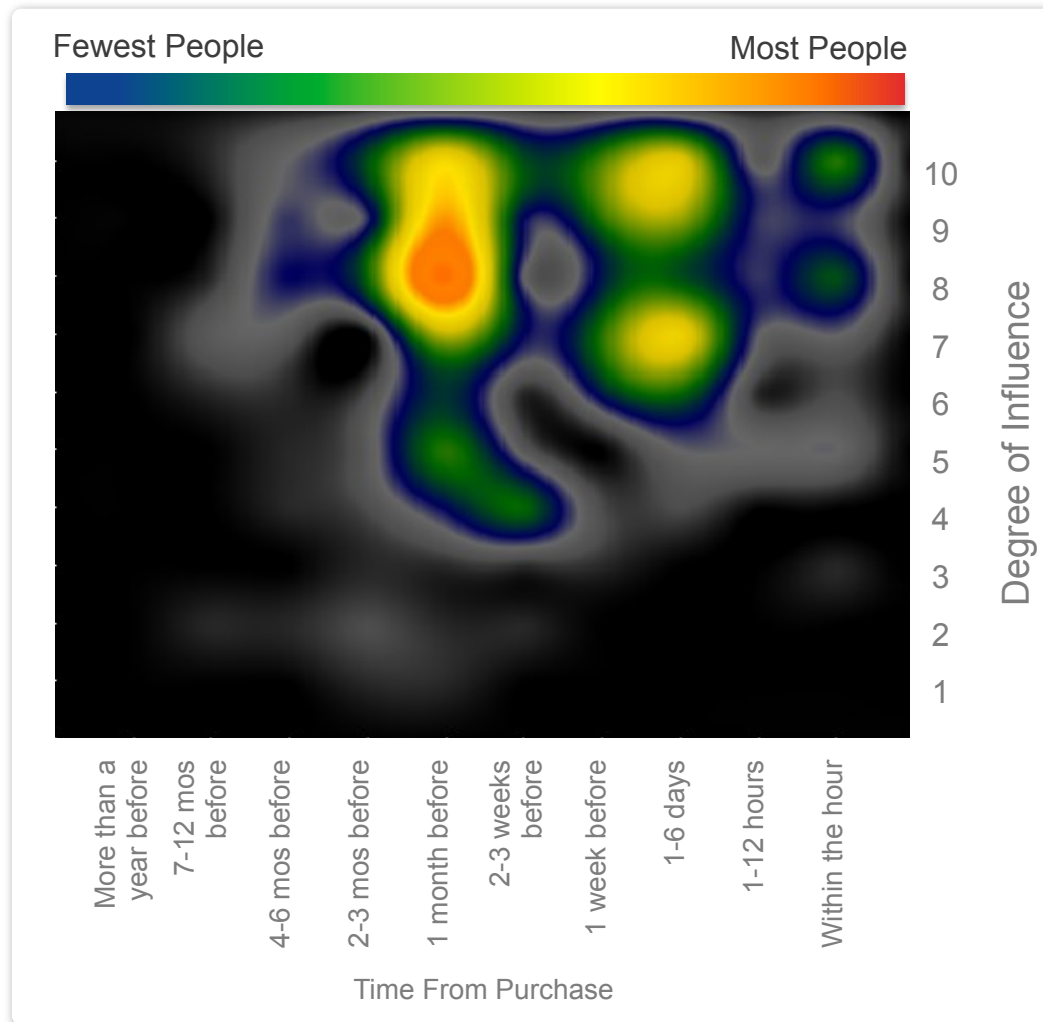
- Warranty Information
- How the Product Looks/Aesthetics
- Convenience of Purchase
- Brand Reputation
- Product Performance/Functionality
- Price/Special Offers

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Base N=500

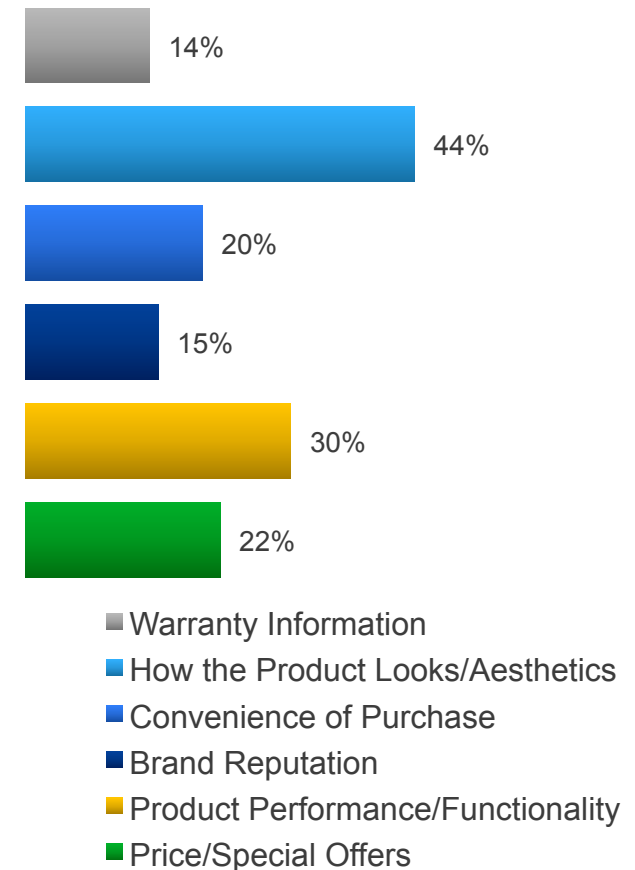
Source: Google/Shopper Sciences, Zero Moment of Truth Study – Tech, Apr 2011

Looked at the product package in the store

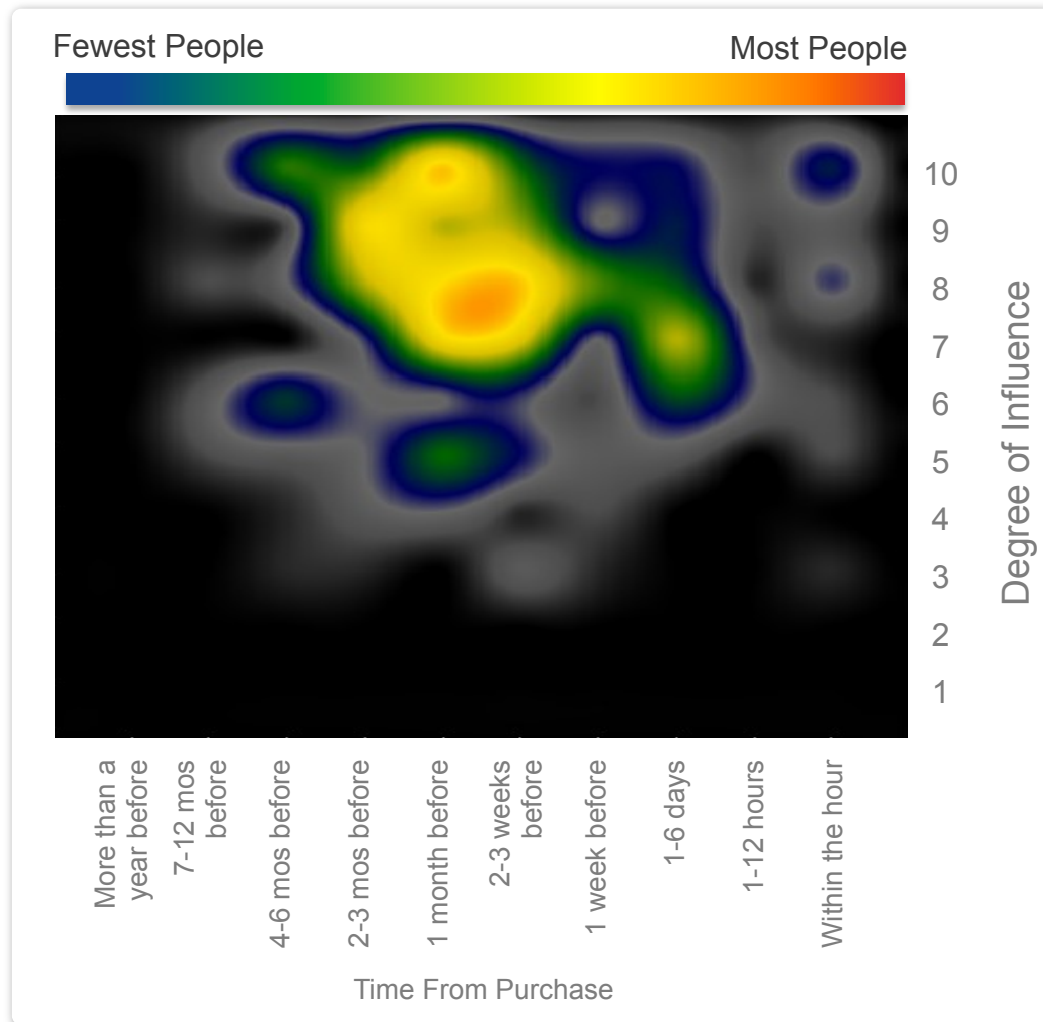


70% Usage 15% Repeat Usage

Source Content

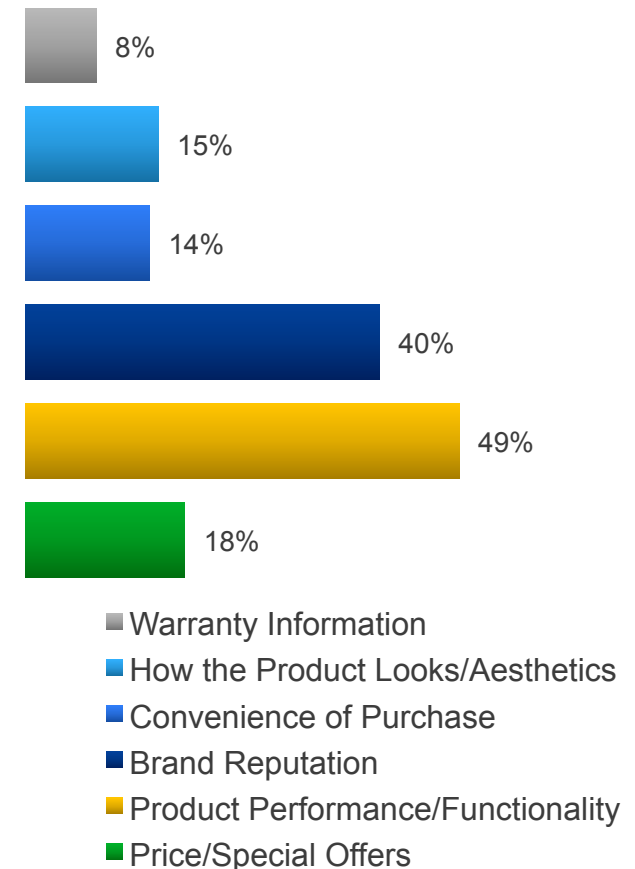


Talked with friends & family about the product

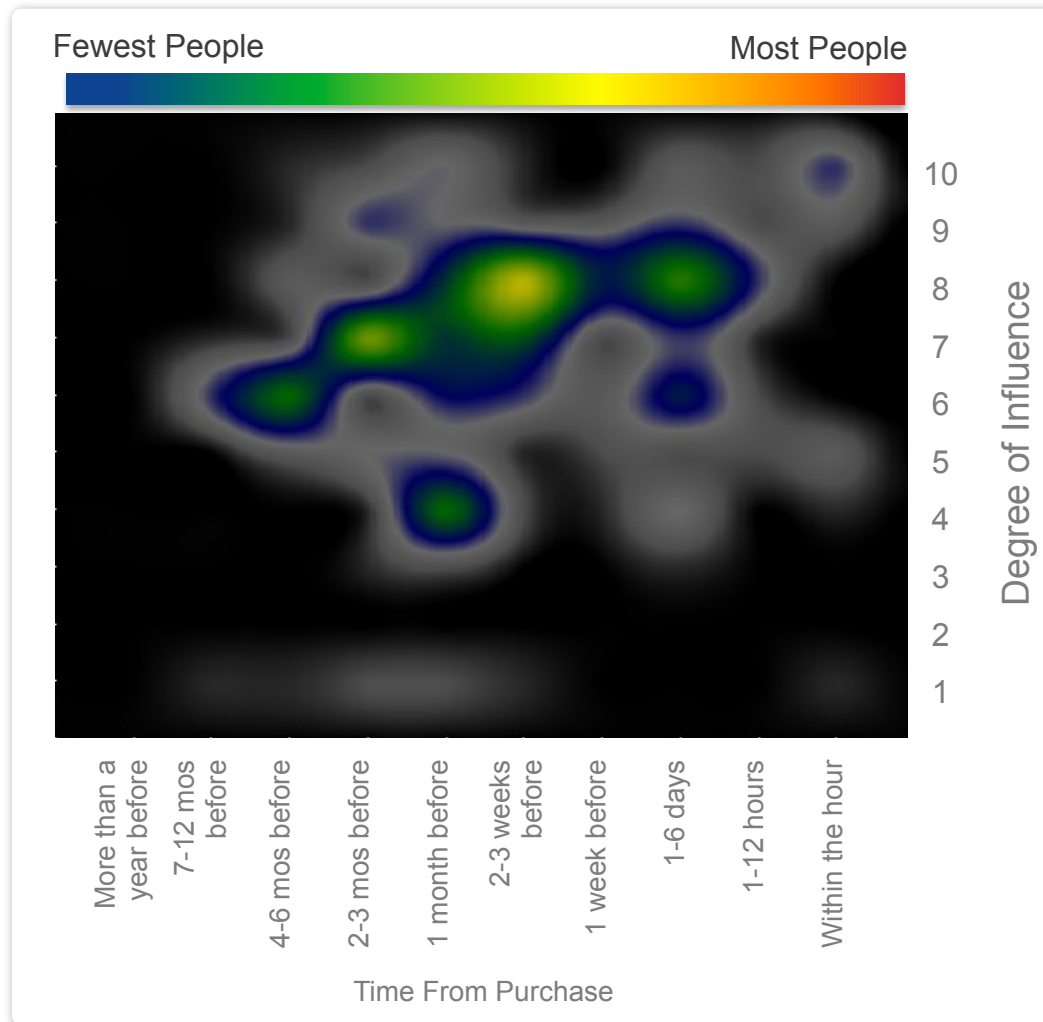


59% Usage **31%** Repeat Usage

Source Content

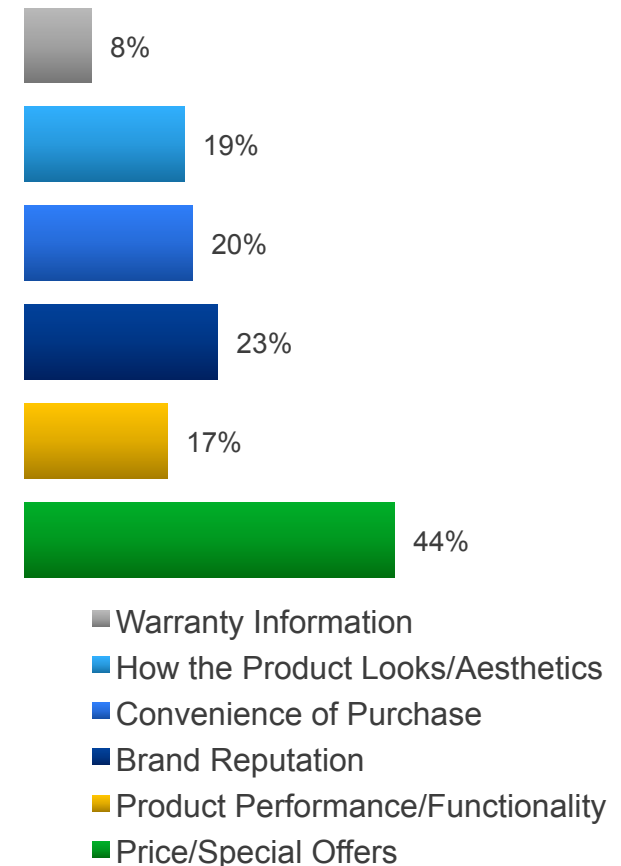


Saw an ad in a newspaper/Newspaper insert

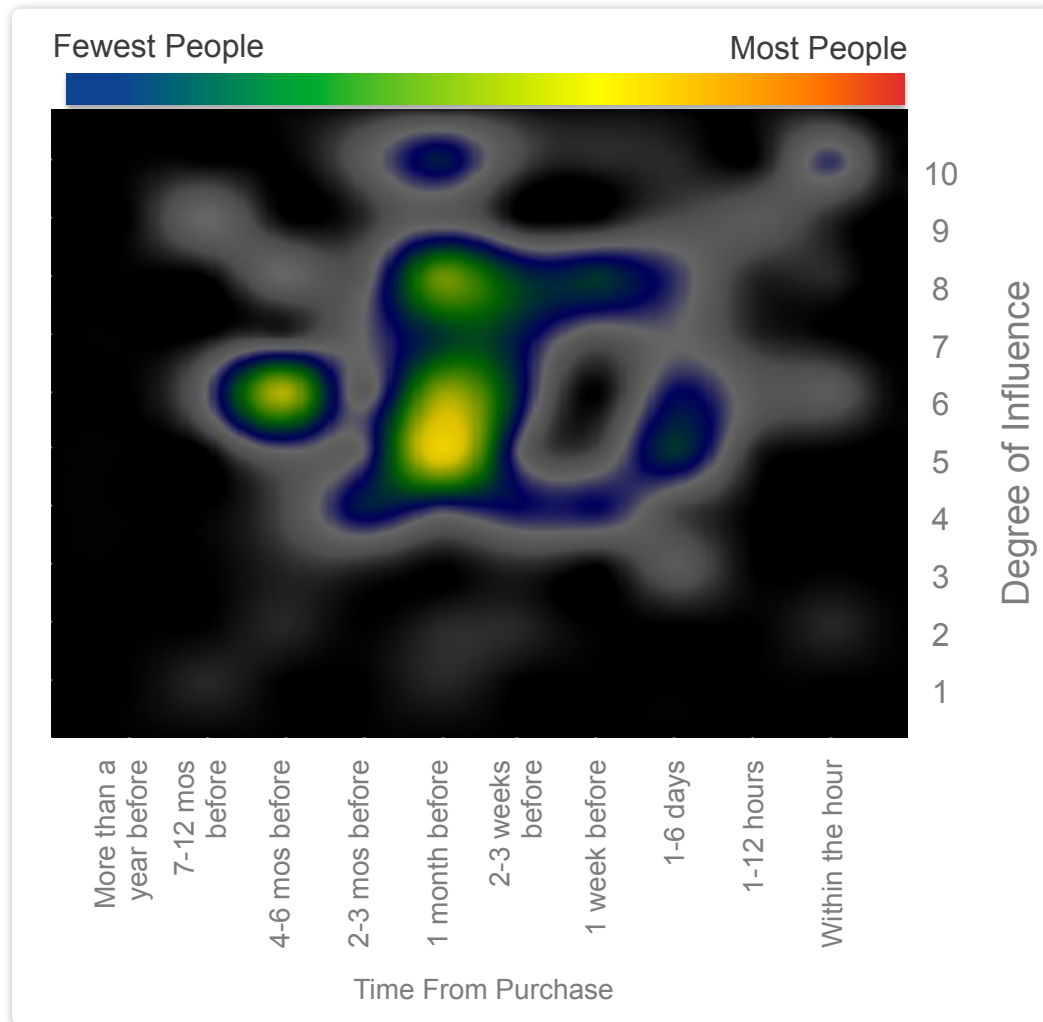


35% Usage 29% Repeat Usage

Source Content

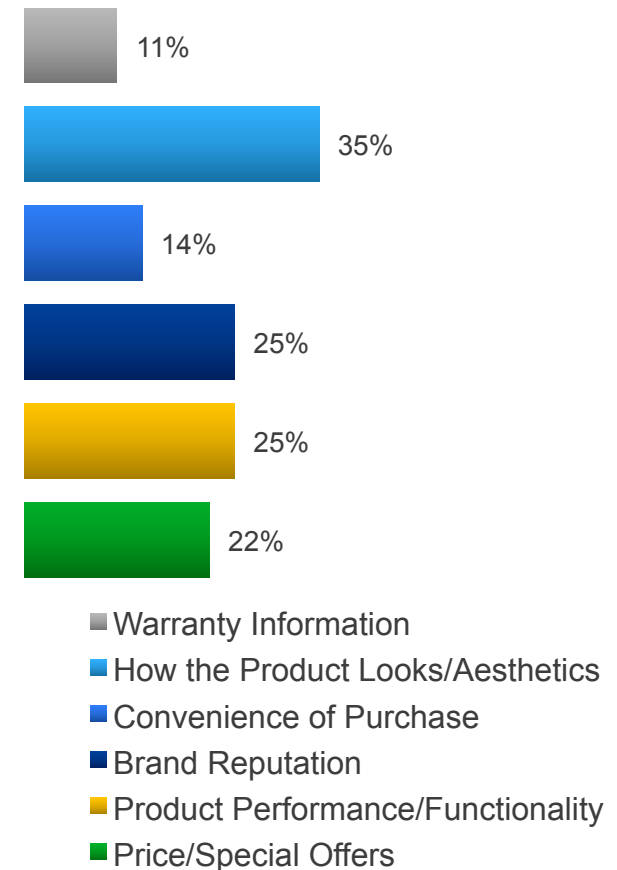


Saw advertisements on television



35% Usage 37% Repeat Usage

Source Content



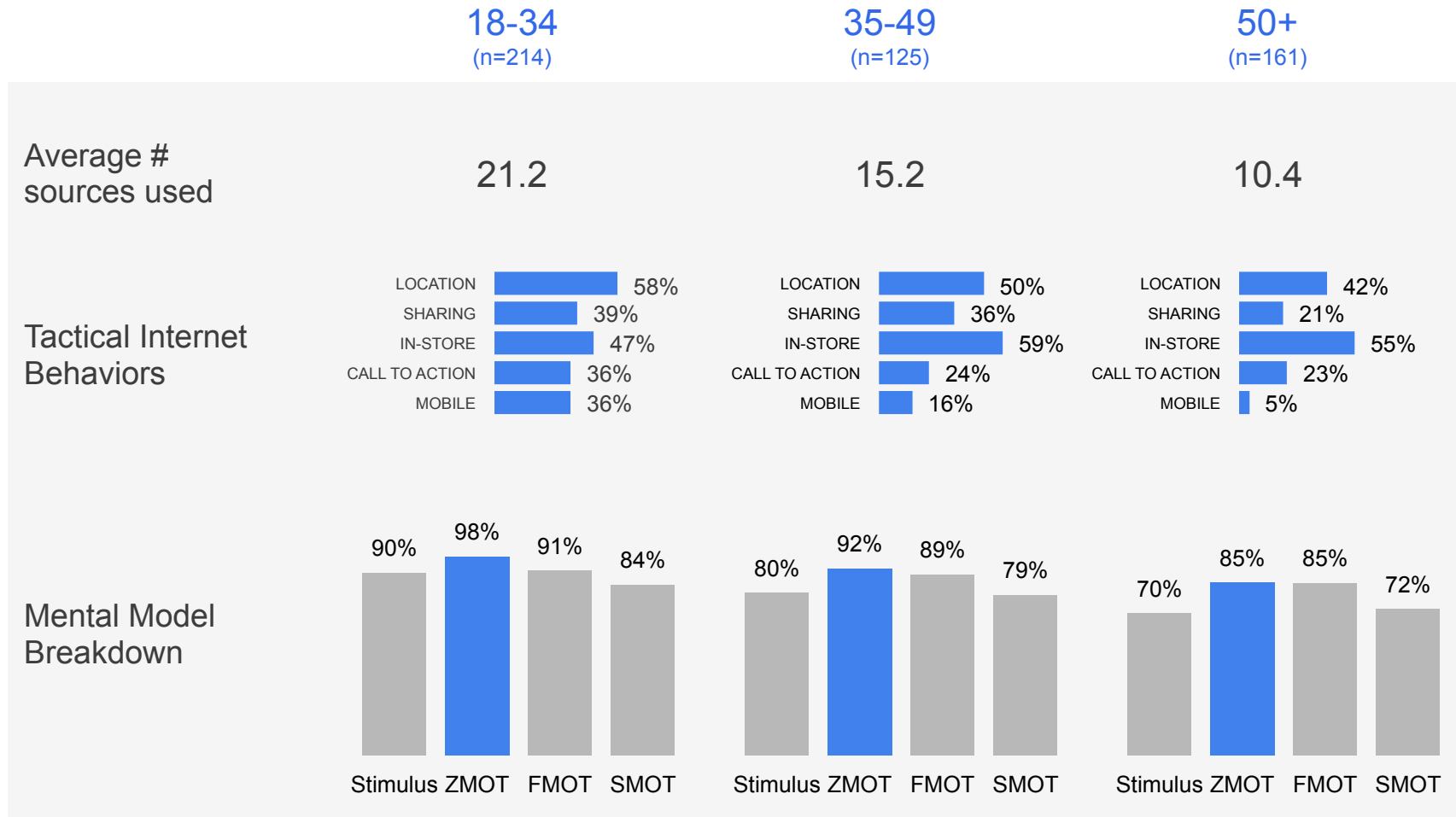
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Appendix

Younger shoppers are much more engaged in all types of research but least likely to take something physically into store.



Definitions of Internet & Mobile Tactical Behaviors

Took To Store	Printed out information to take to the store
	Looked for online coupons that you can use in the store
Saved For Later	Bookmarked pages with information you want to save for future reference
Compared To Other Media	Compared to information found in newspapers or magazines
	Compared to information found in the yellow pages
Location	Got maps / directions to the store
	Got information on a particular store (hours, parking, etc.)
	Read reviews on a particular store
	Found locations of the store
Sharing/Social	Read my friend's reviews on a product or look at their likes / fan pages
	Saw what others who viewed the item actually purchased
	Sent a link to someone else for their input
	Recommended a site or product to my friends on a social networking site
In-store Information	Checked availability of the item in the store
	Looked for information on upcoming sales at the store
Call To Action	Set price alerts to be notified when the product reaches your desired price
	Added sale date information to your calendar
	Held or reserved an item in the store
	Called a store from phone number provided online
Mobile	"Checked in" to a location with your mobile phone
	Used mobile phone to find directions
	Used mobile phone to find the best prices
	Used search engine on my mobile phone
Additional Media	Looked up Rewards Programs / Points programs for special discounts / coupons / points
	Looked at newspaper inserts / coupons online

Males engage in more research, but do not feedback into the cycle as much as females will. Males are also more mobile engaged.

