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The Zero Moment of Truth Study – Voters

Google/Shopper Sciences, U.S.
April 2011

Summary

Unlike any other category in this research, Stimulus and ZMOT are the primary source nodes for this category.

- Voters are looking to many different traditional media outlets and information direct from the candidate in their decision-making process.

- However, influence and quality of experience of some of these sources is very low such as that for TV. Voters appear to have a "necessary evil" approach to the stimulus sources they so heavily use.

Voters are doing more self-directed research online.

- This is typically happening about one month before.

- Voters look to stimulus sources to become informed about party affiliation, candidate reputation and experience.

- Voters turn to ZMOT type sources to become informed about around key economic and social issues

- In general, voters are turned off by direct mail from political parties and outdoor billboard ads.

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Objectives & Methodology

How is the candidate selection process for voting changing in a digitally powered world?

What role do new media like social
& mobile in influencing how consumer choose who to vote for?

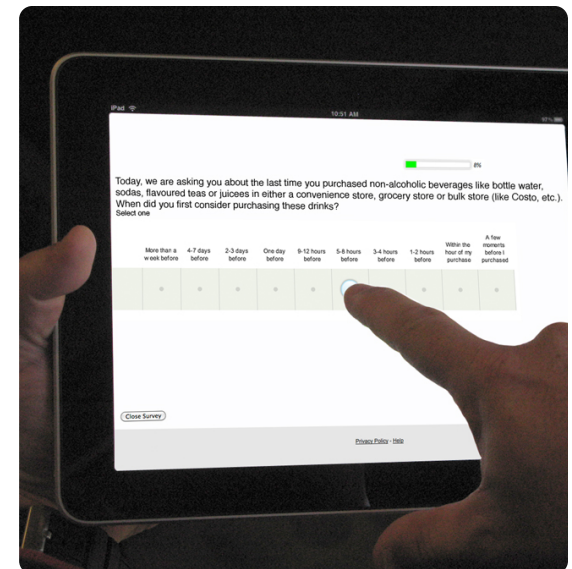How effective are traditional ads at changing actual voting behavior?

Online shopper surveys with interactive game-like construct

Fielded in March 2011 in the US

Adults participated in 2010 Mid-Term Elections

N=500 Voters

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Traditional 3-Step Mental Model of Marketing

Stimulus

First
Moment of
Truth

At shelf
In-store

Second
Moment of
Truth

Experience

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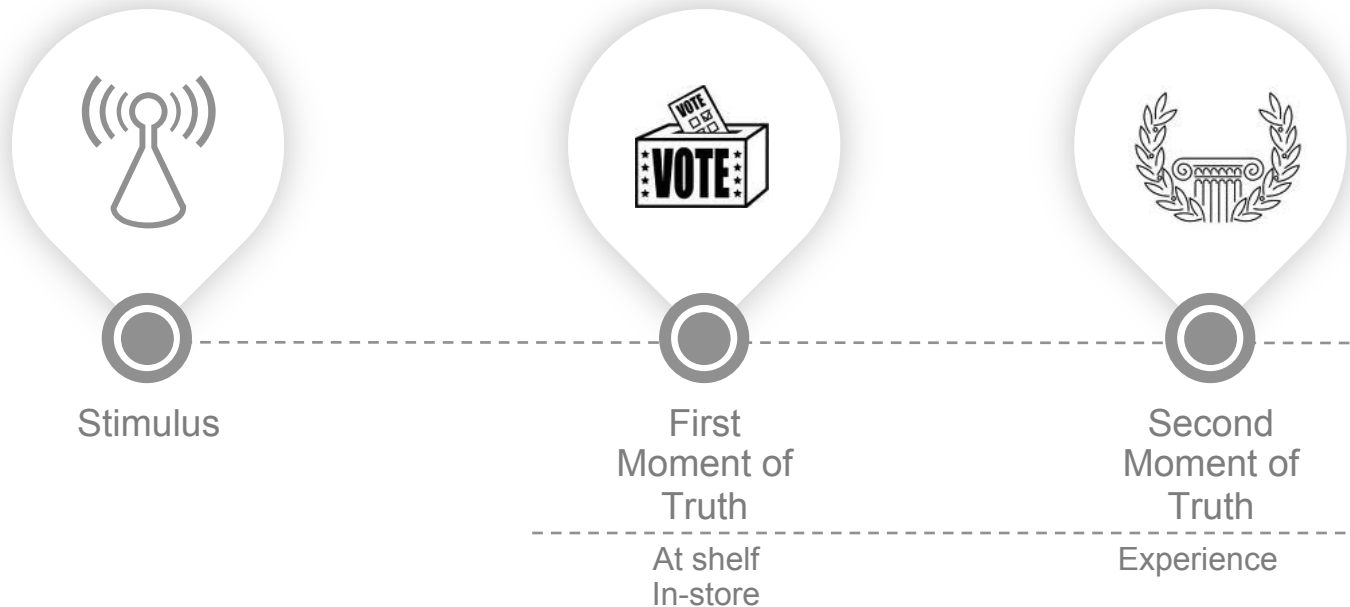
The New Mental Model of Marketing

Stimulus

ZMOT
Pre-shopping |
In-store | In-home

First
Moment of
Truth
At shelf
In-store

Second
Moment of
Truth
Experience

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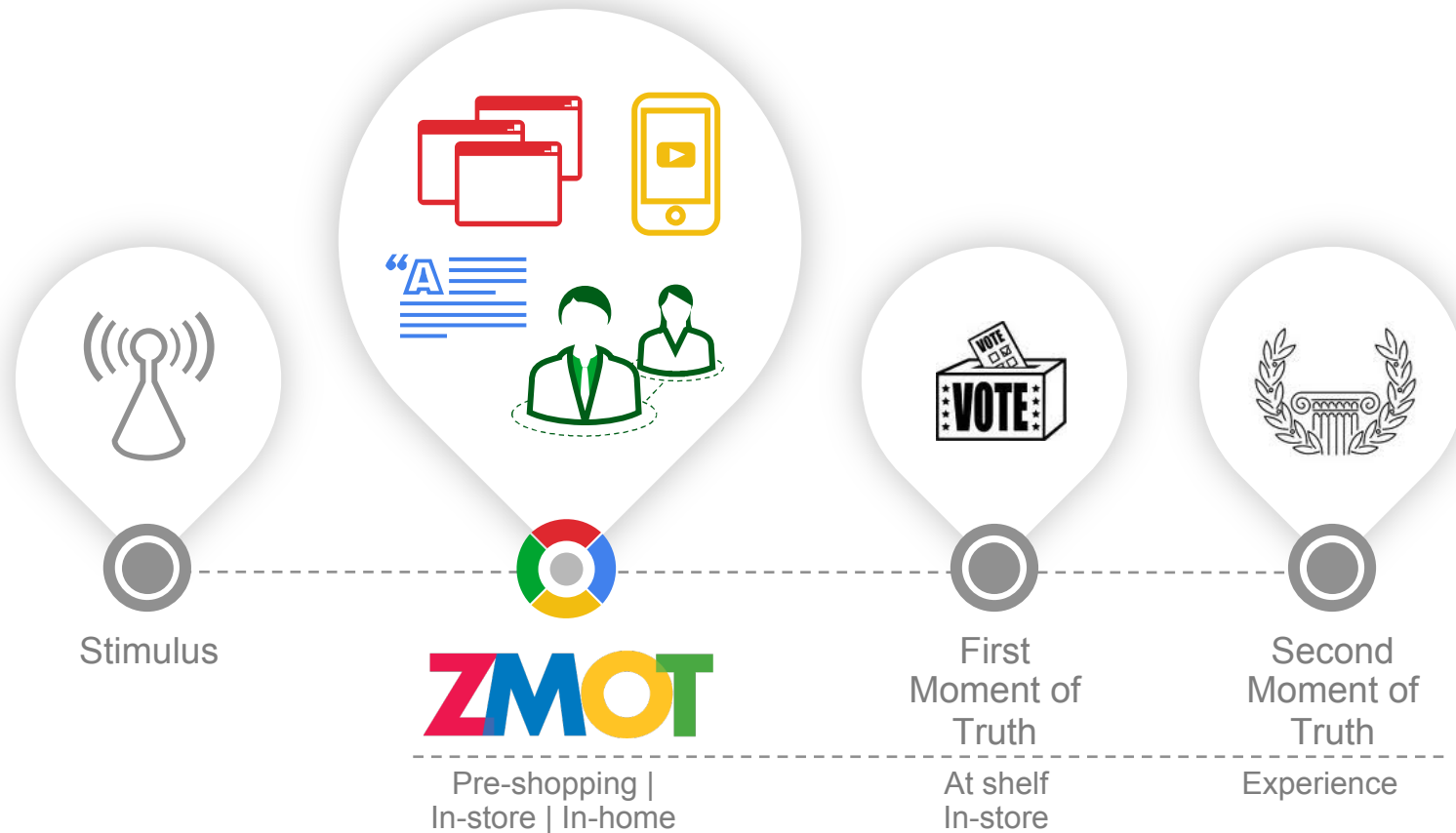
We asked voters…

When? Voting Timeline

How far in advance do voters start shaping their decisions?

What? Source Usage

What traditional and new media sources did voters use to help them select a candidate?

How? Influence

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

Why? Information-Seeking

Why did voters consult the internet? What information where they looking for?

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The majority of voters start their research process 3-4 months out.

Length of Decision Cycle

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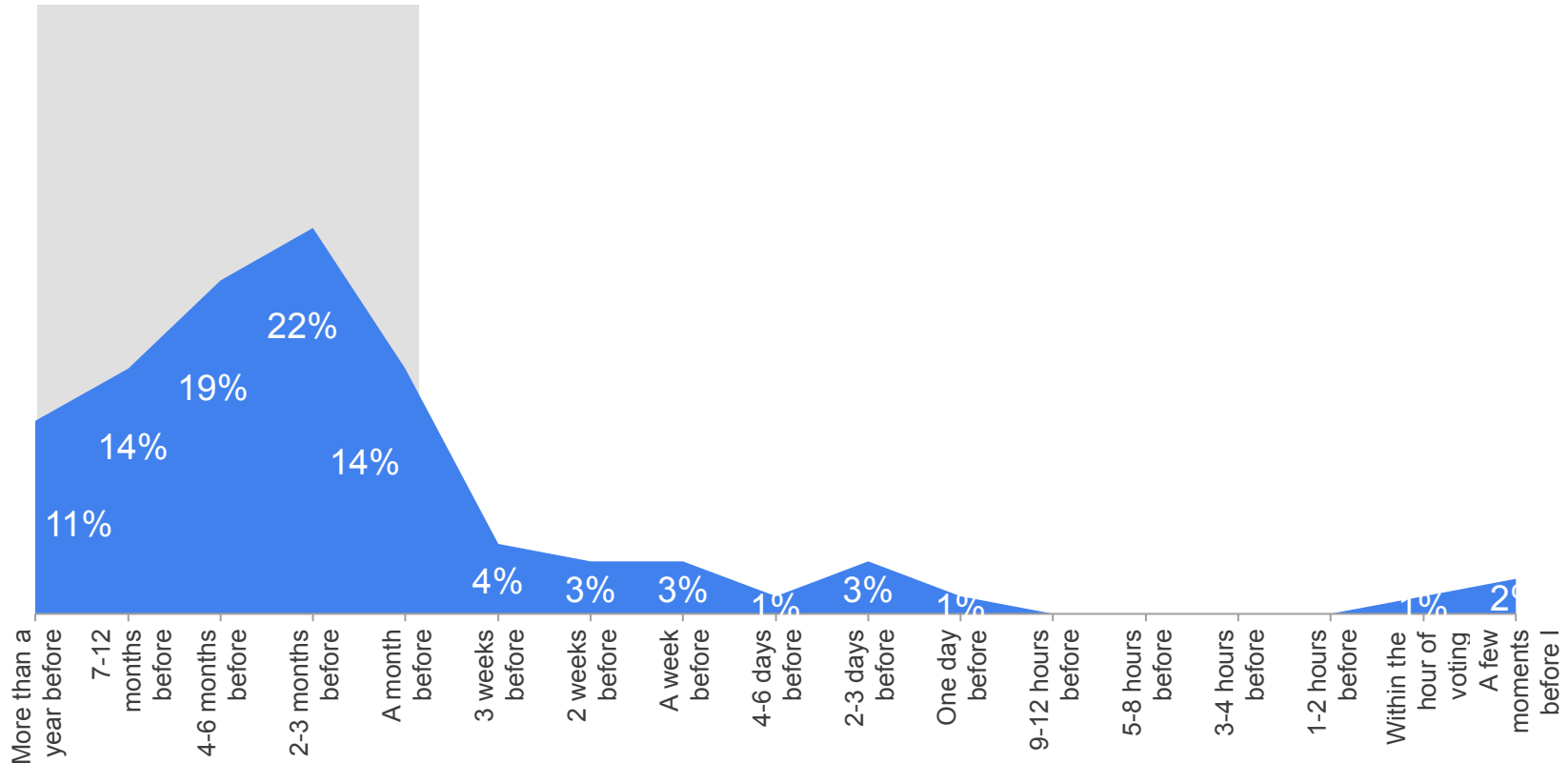
Voters used on average 14.7 sources of information to help them make their candidate selection

14.7
sources

35%
average usage

For any one source, on average 35% of voters used it.

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Top sources used by voters to help with their decisions

Sources Used – Above the 35% Average Usage Score for Voters

Source	%
Read newspaper articles / reviews / information	83%
Saw advertisements on television	81%
Received mail at home from a candidate	73%
Received mail at home from a political party / action committee	70%
Watched a TV show that featured the candidates	65%
Saw an ad in a newspaper / newspaper insert	65%
Read magazine articles / reviews / information about	63%
Heard candidates discussed on the radio	59%
Saw an ad on an outdoor billboard	47%
Looked at / read magazine advertisements	44%
Read information in an email received from a political party /	43%
Read information in an email received from a candidate	36%
Talked with friends / family about the candidate	81%
Read candidate reviews or endorsements online	50%
Compared candidates online	49%
Read comments following an article / opinion piece online	45%
Sought information from a candidate website	45%
Searched online, used search engine	40%
Read brochure / pamphlet about the candidate	72%

Stimulus

ZMOT

FMOT

Q2 When you were considering voting for a candidate, what sources of information did you seek out to help with your decision? (42 Sources)
Base N=500
Source: Google/Shopper Sciences, Zero Moment of Truth Study – Voters, Apr 2011

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Voters are using stimulus and ZMOT sources to form their decisions.

99% — Stimulus
95% — ZMOT
77% — FMOT

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Most influential sources for voters

Source	Value
Compared candidates online	50%
Watched a TV show that featured the candidates	49%
Talked with friends/family about the candidate	42%
Heard candidates discussed on the radio	37%
Sought information from a candidate website	37%
Read newspaper articles/reviews/information	36%
Read comments following an article/opinion piece online	25%
Read magazine articles/reviews /information about candidates	24%
Read candidate reviews or endorsements online	22%
Read brochure/pamphlet about the candidate	15%
Saw an ad in a newspaper/newspaper insert	6%
Received mail at home from a candidate	3%
Saw advertisements on television	2%
Received mail at home from a political party/action committee	-1%
Saw an ad on an outdoor billboard	-30%

25% Average

■ Below Average Net Influence

Q5 We'd like you to tell us how influential each of these sources of information was to you at the time.
Please select a number from 1-10 for each of the sources below where 1 is "least influential" and 10 is "most influential." You may select any number in between 1 and 10.
Base N=500
Source: Google/Shopper Sciences, Zero Moment of Truth Study – Voters, Apr 2011

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Top reasons for voters to consult the internet

Tactical internet behaviors – Above average shown

Compared campaign platforms against other candidates	47%
Looked at candidate websites online	41%
Found locations of the voting poll location	24%
Looked for online sample ballots that you can use at the voting poll location	17%
Got information on a particular campaign event, voting poll location (hours, parking, etc.)	17%
Read my friend's reviews on a candidate or looked at their likes / fan pages	14%

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Post voting behavior (SMOT)

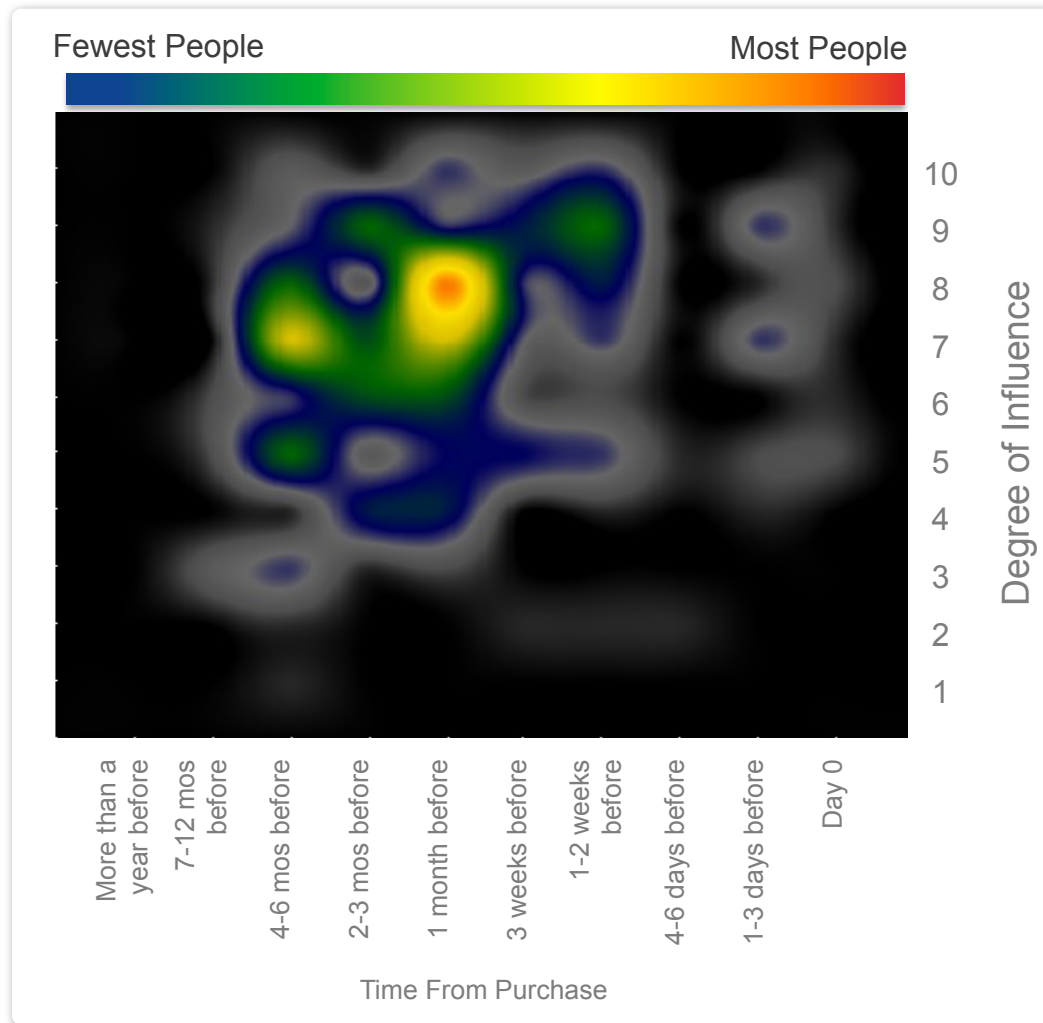| Activity	Percentage
Mentioned it to friends/family	57%
Mentioned it to a co-worker	28%
Took a survey	16%
Wrote about it on a Facebook page	10%
Wrote about it in a blog	4%
Wrote an opinion piece on a website	4%
Posted Tweets about it	4%
None of the above	34%

- One-quarter shared their experience via digital sharing after the election.

- Most voters will participate in traditional word-of-mouth.

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Heat Maps

The intersection of when, what, how and why

Searched online with a search engine

Fewest People / Most People

Degree of Influence

Time From Purchase

More than a year before | 7-12 mos before | 4-6 mos before | 2-3 mos before | 1 month before | 3 weeks before | 1-2 weeks before | 4-6 days before | 1-3 days before | Day 0

40% Usage **34%** Repeat Usage

Source Content
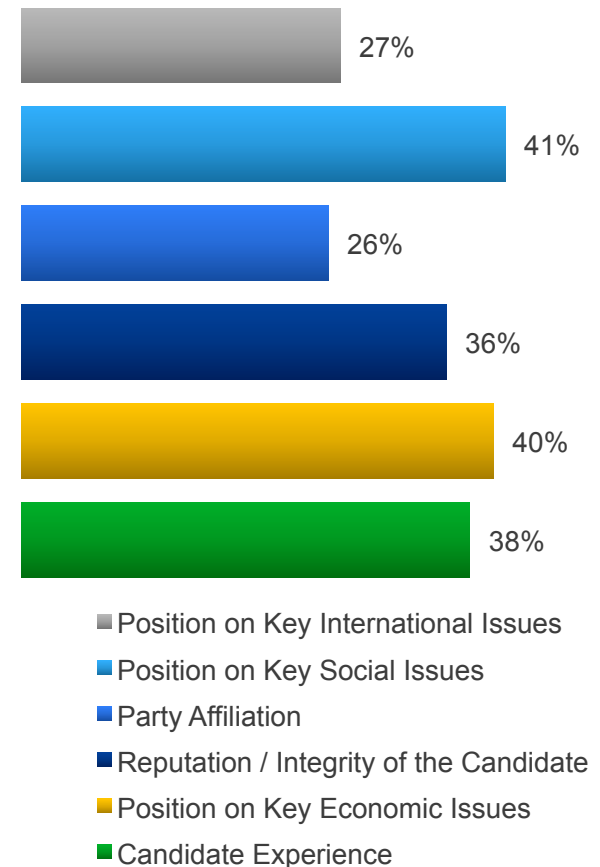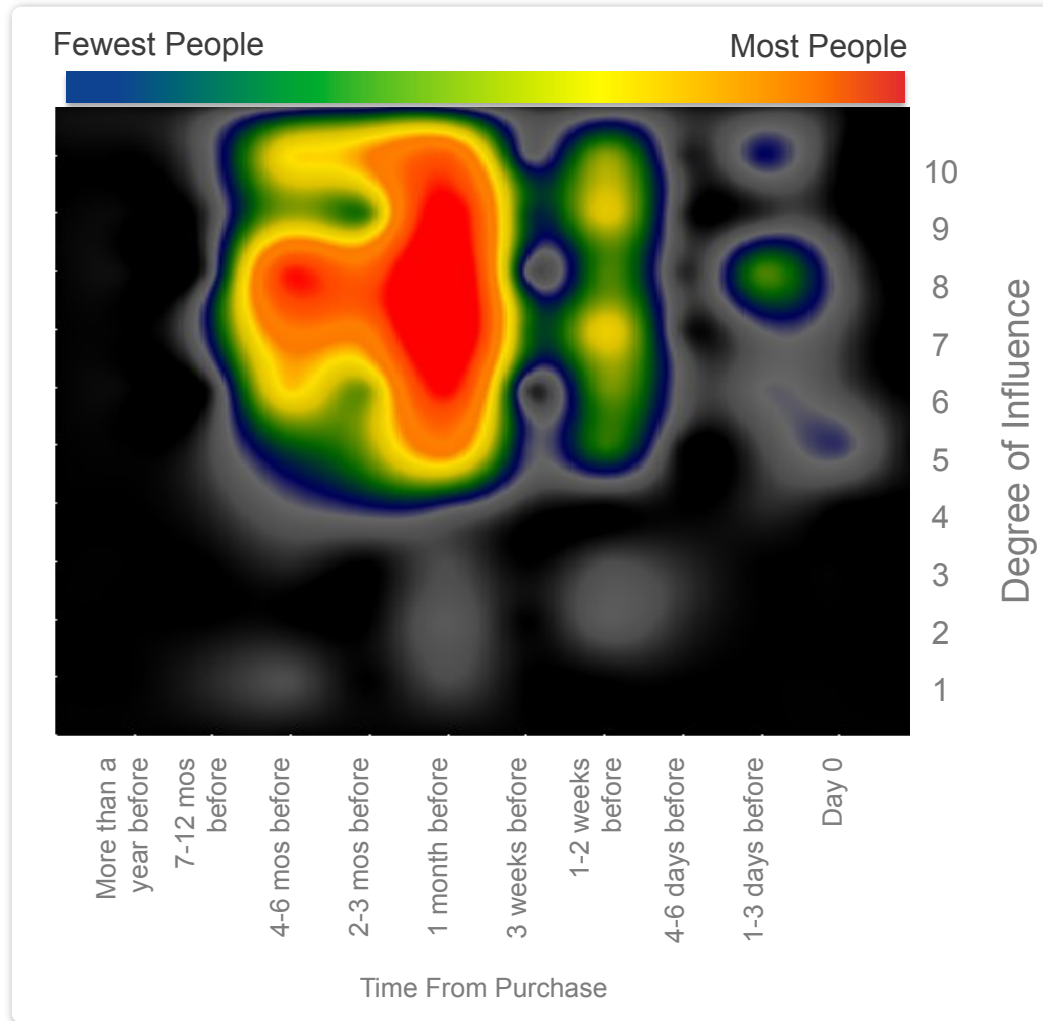
- 27% — Position on Key International Issues
- 41% — Position on Key Social Issues
- 26% — Party Affiliation
- 36% — Reputation / Integrity of the Candidate
- 40% — Position on Key Economic Issues
- 38% — Candidate Experience

Base N=500

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Talked with friends & family about the candidate

Fewest People — Most People

Degree of Influence

10 9 8 7 6 5 4 3 2 1

Time From Purchase

More than a year before | 7-12 mos before | 4-6 mos before | 2-3 mos before | 1 month before | 3 weeks before | 1-2 weeks before | 4-6 days before | 1-3 days before | Day 0

81% Usage **80%** Repeat Usage

Source Content
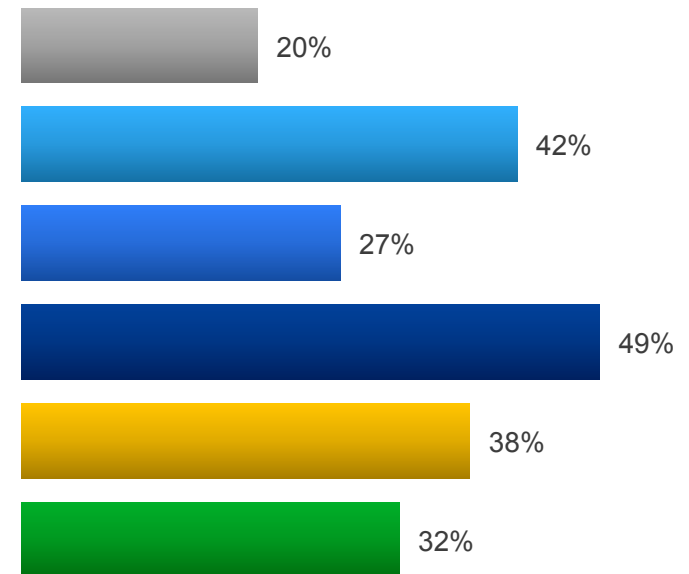
- 20%
- 42%
- 27%
- 49%
- 38%
- 32%

■ Position on Key International Issues
■ Position on Key Social Issues
■ Party Affiliation
■ Reputation / Integrity of the Candidate
■ Position on Key Economic Issues
■ Candidate Experience

Base N=500

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Saw advertisements on television

Fewest People — Most People

Degree of Influence

10 9 8 7 6 5 4 3 2 1

Time From Purchase

More than a year before | 7-12 mos before | 4-6 mos before | 2-3 mos before | 1 month before | 3 weeks before | 1-2 weeks before | 4-6 days before | 1-3 days before | Day 0

81% Usage **100%** Repeat Usage
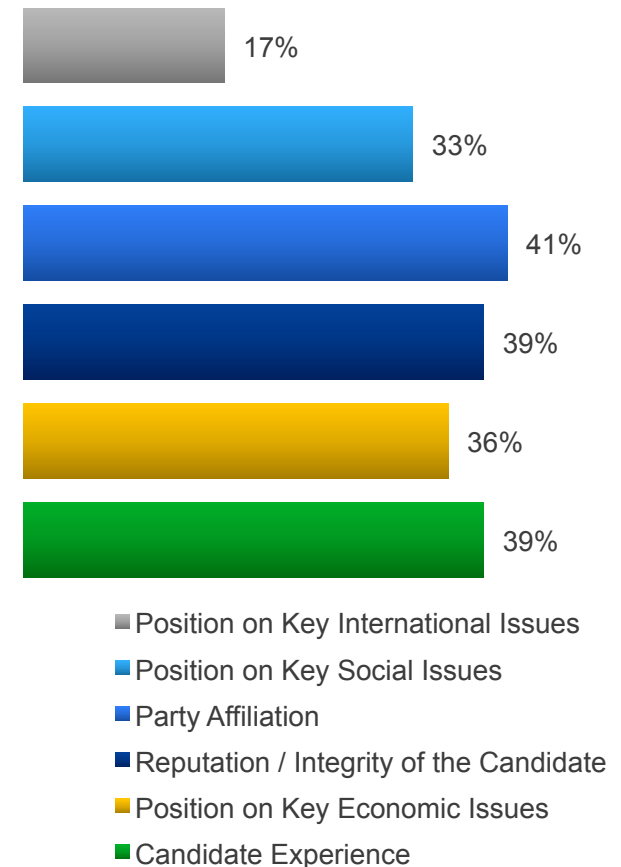
Source Content

17%
33%
41%
39%
36%
39%

■ Position on Key International Issues
■ Position on Key Social Issues
■ Party Affiliation
■ Reputation / Integrity of the Candidate
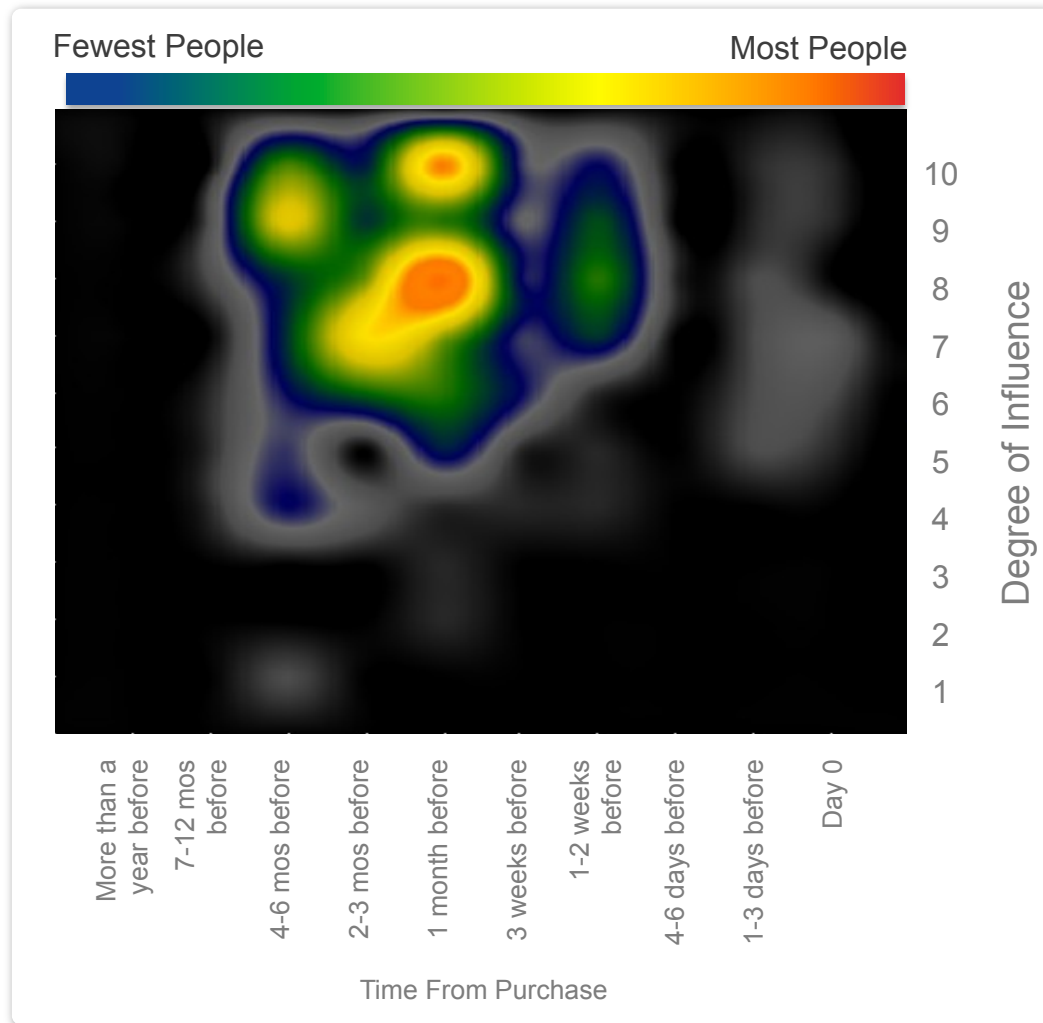■ Position on Key Economic Issues
■ Candidate Experience

Base N=500

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Compared candidates online

Fewest People → Most People

Degree of Influence: 10 9 8 7 6 5 4 3 2 1

Time From Purchase

More than a year before | 7-12 mos before | 4-6 mos before | 2-3 mos before | 1 month before | 3 weeks before | 1-2 weeks before | 4-6 days before | 1-3 days before | Day 0

49% Usage   **30%** Repeat Usage

Source Content
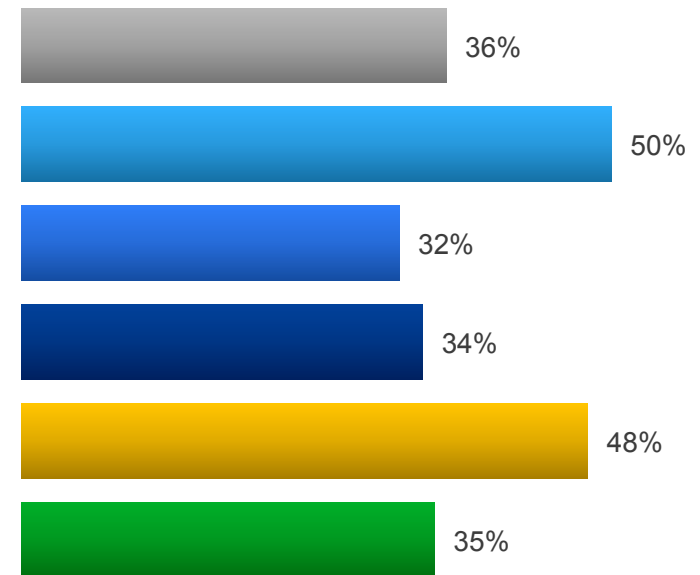
■ Position on Key International Issues	36%
■ Position on Key Social Issues	50%
■ Party Affiliation	32%
■ Reputation / Integrity of the Candidate	34%
■ Position on Key Economic Issues	48%
■ Candidate Experience	35%

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Read candidate reviews or endorsements online

Fewest People   Most People

10
9
8
7
6
5
4
3
2
1

Degree of Influence

More than a year before | 7-12 mos before | 4-6 mos before | 2-3 mos before | 1 month before | 3 weeks before | 1-2 weeks before | 4-6 days before | 1-3 days before | Day 0

Time From Purchase
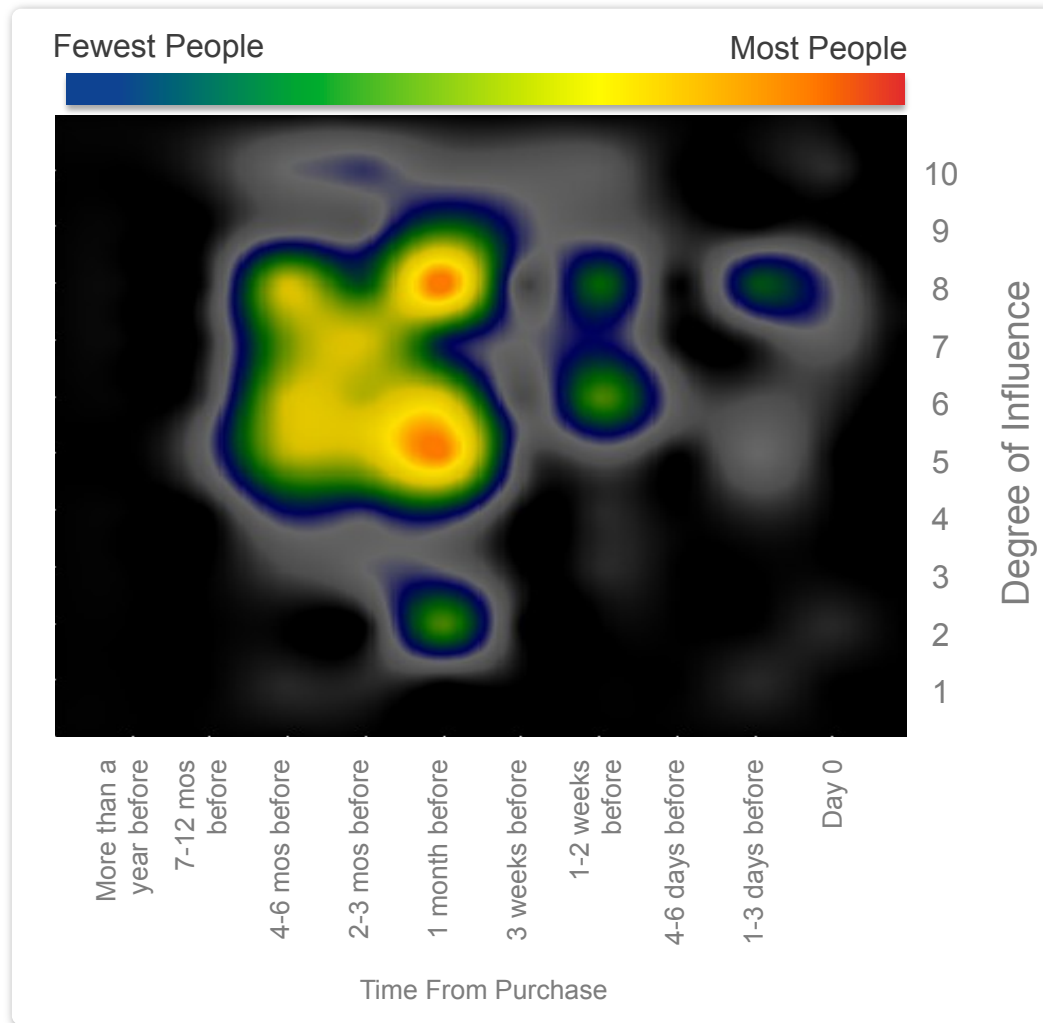
50% Usage **42%** Repeat Usage
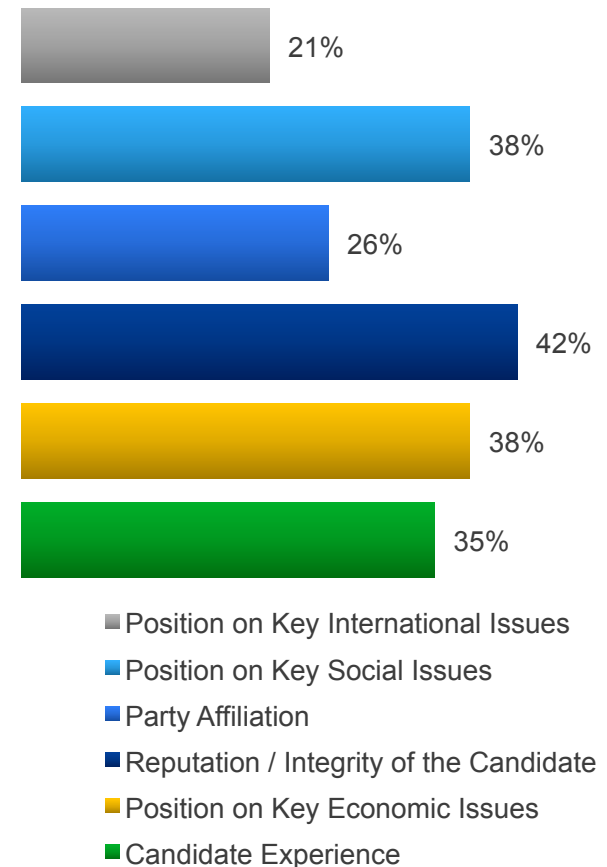
Source Content

21%
38%
26%
42%
38%
35%

■ Position on Key International Issues
■ Position on Key Social Issues
■ Party Affiliation
■ Reputation / Integrity of the Candidate
■ Position on Key Economic Issues
■ Candidate Experience

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Base N=500

Summary

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Younger voters use more sources, rely on more mobile information and are more comfortable sharing

	18-34 (n=119)	35-49 (n=100)	50+ (n=282)
Average # of sources used	20.2	14.6	13.5

Tactical Internet Behaviors

18-34:
- Saved for Later — 18%
- Location — 50%
- Sharing — 39%
- Mobile — 28%

35-49:
- Saved for Later — 6%
- Location — 45%
- Sharing — 24%
- Mobile — 10%

50+:
- Saved for Later — 9%
- Location — 38%
- Sharing — 18%
- Mobile — 2%

Mental Model Breakdown

18-34:
- Stimulus 98%
- ZMOT 99%
- FMOT 72%
- SMOT 80%

35-49:
- Stimulus 99%
- ZMOT 94%
- FMOT 68%
- SMOT 67%

50+:
- Stimulus 99%
- ZMOT 94%
- FMOT 82%
- SMOT 60%

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Campaign donors use more sources, are more engaged in sharing and mobile research and are more likely to share post voting

	Never Donated (N=384)	Donated (N=117)
Average # of sources used	13.2	14.6

Tactical Internet Behaviors

Never Donated
- Saved for Later: 9%
- Location: 38%
- Sharing: 17%
- Call to Action: 13%
- Mobile: 5%

Donated
- Saved for Later: 16%
- Location: 55%
- Sharing: 47%
- Call to Action: 26%
- Mobile: 24%

Mental Model Breakdown

Never Donated
- Stimulus: 99%
- ZMOT: 94%
- FMOT: 74%
- SMOT: 61%

Donated
- Stimulus: 100%
- ZMOT: 98%
- FMOT: 85%
- SMOT: 84%

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About the respondents in the study: Voting frequency and donation behavior

Voting Behavior	
I vote in every election including national, state and local elections	70%
I always vote in national elections and sometimes vote in state and local elections	23%
I always vote in state and/or local elections and sometimes vote in national elections	5%
I only vote in national elections	1%
I only vote in state and/or local elections	0%
I rarely vote in any election	0%

Donation Amount	
I do not donate/ have not donated	77%
Under $100	15%
$100 to $249	6%
$250 to $499	2%
$500 to $999	1%
$1,000 to $1,499	0%
$1,500 to $1,999	0%
$2,000 to $2,499	0%
$2,500 or more	0%

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QS7 Which of the following best describes your voting behavior?
QS8 Which of the following ranges best describes how much you have donated to a candidate, an election campaign or political party in the past 12 months?
Base N=500

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