



ZMOT Heat Maps by Source

How the sources used by shoppers vary by 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

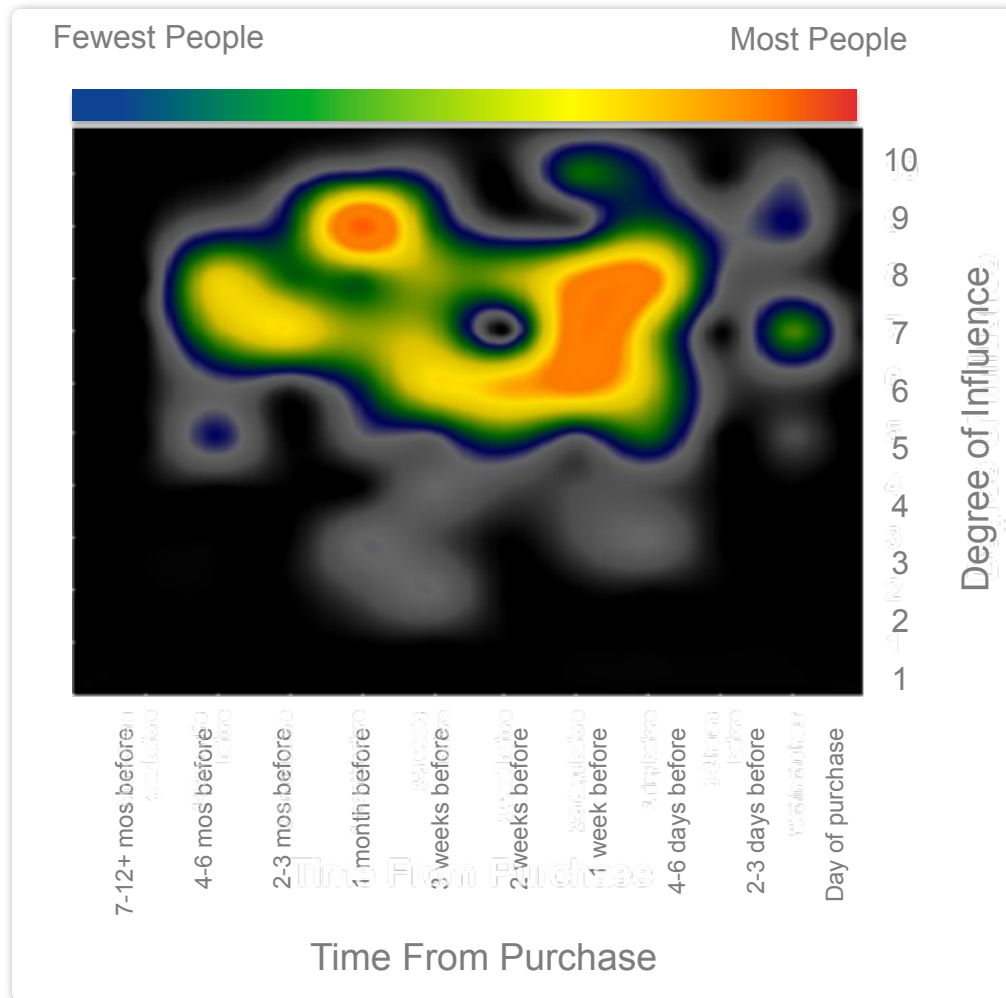
What traditional and new media sources did shoppers use to help them decide on their purchases?

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?

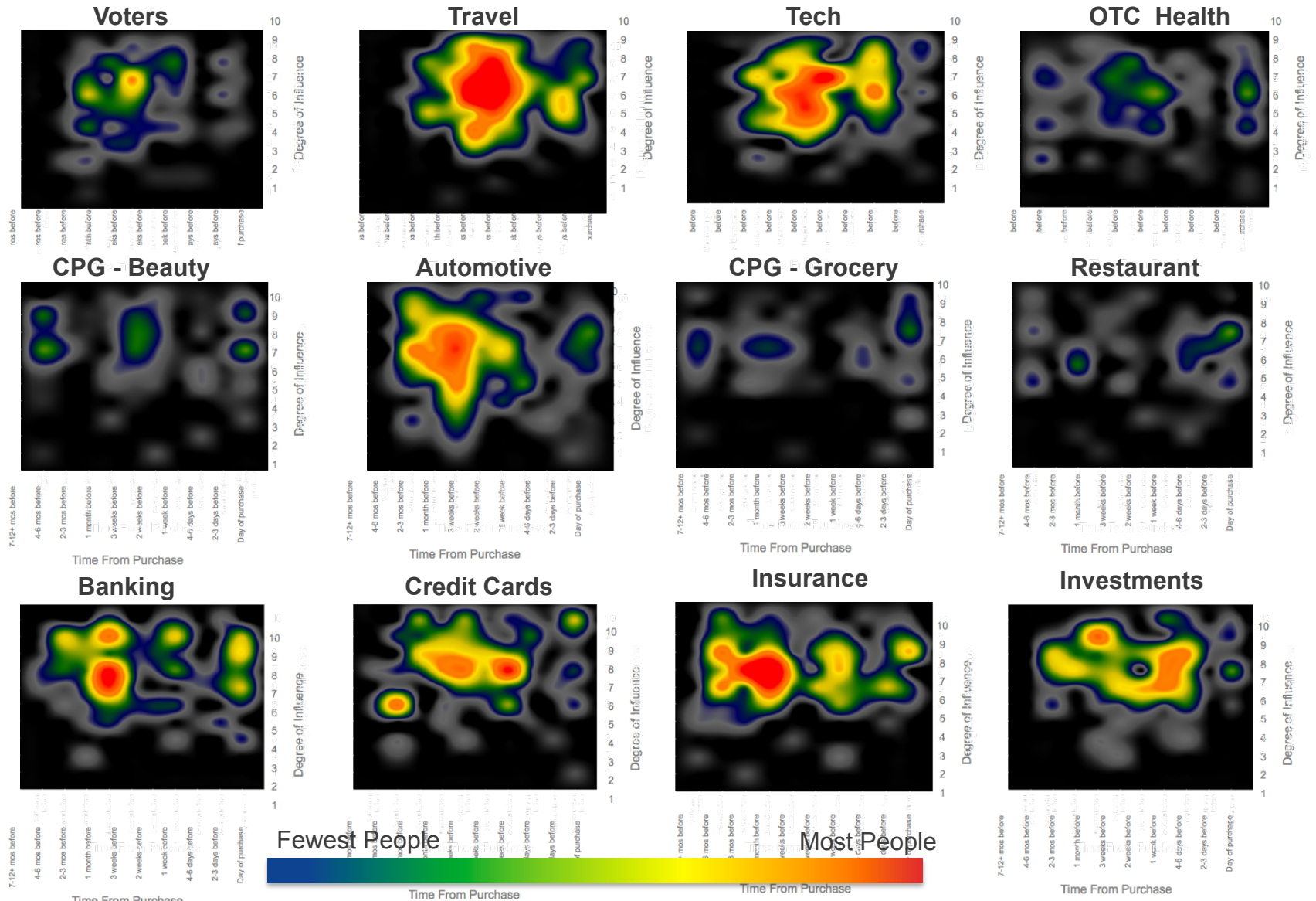
HOW TO: Look at where the bright dots are lined up against the timeline on the x-axis. The brighter the dot – the more people that do this action at that time.

- *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

Used a Search Engine – category comparison

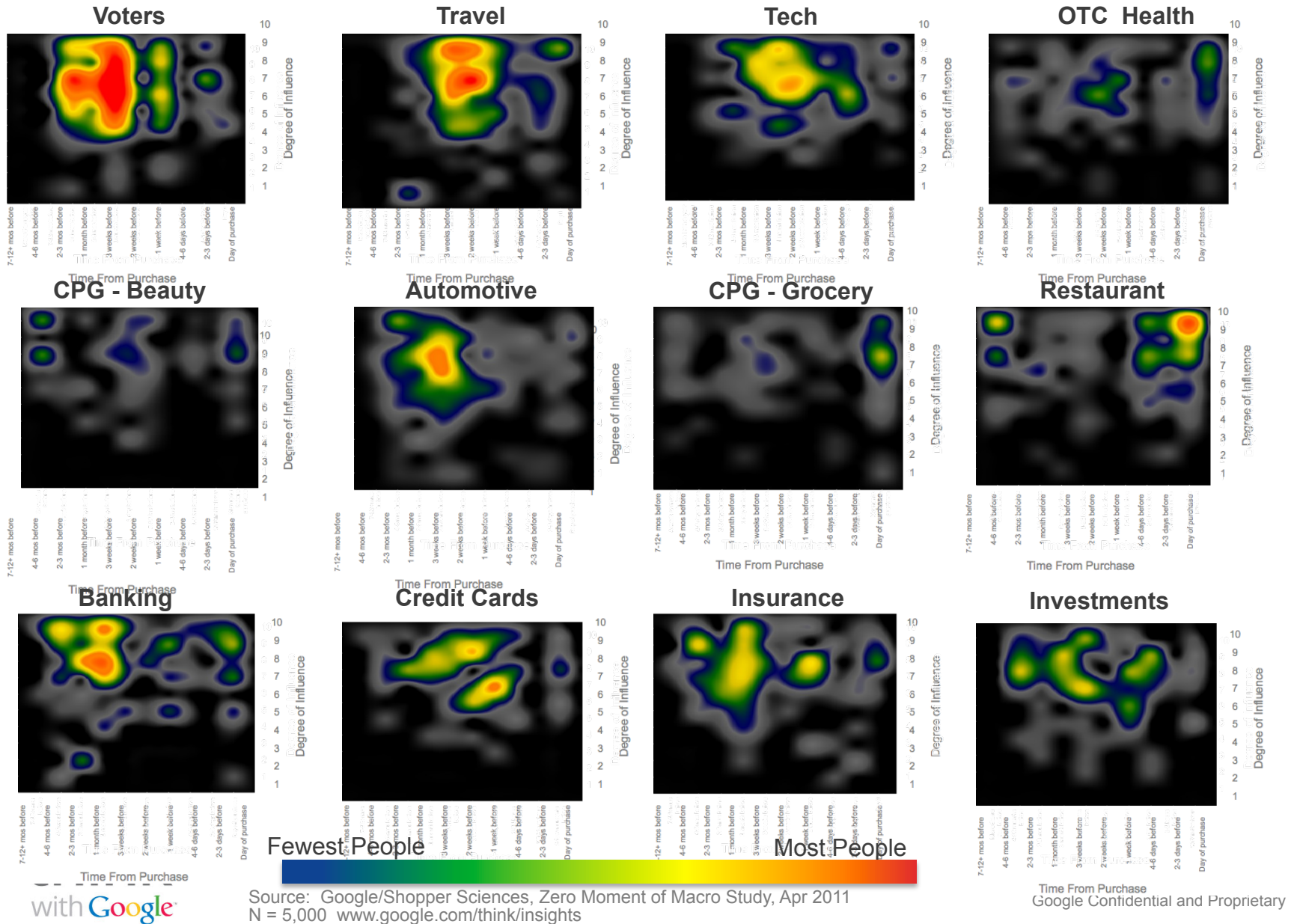


with Google

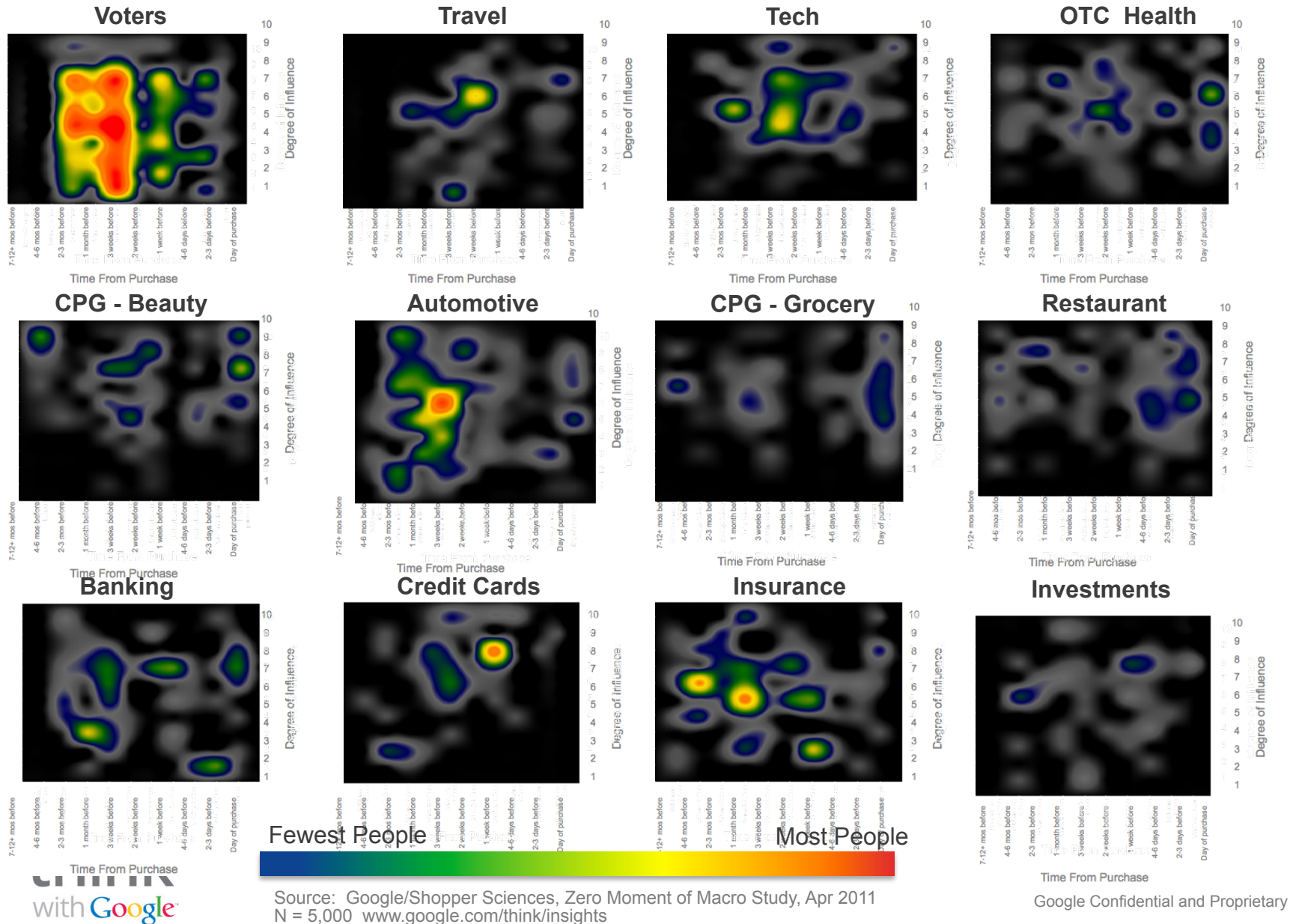
Source: Google/Shopper Sciences, Zero Moment of Macro Study, Apr 2011
N = 5,000 www.google.com/think/insights

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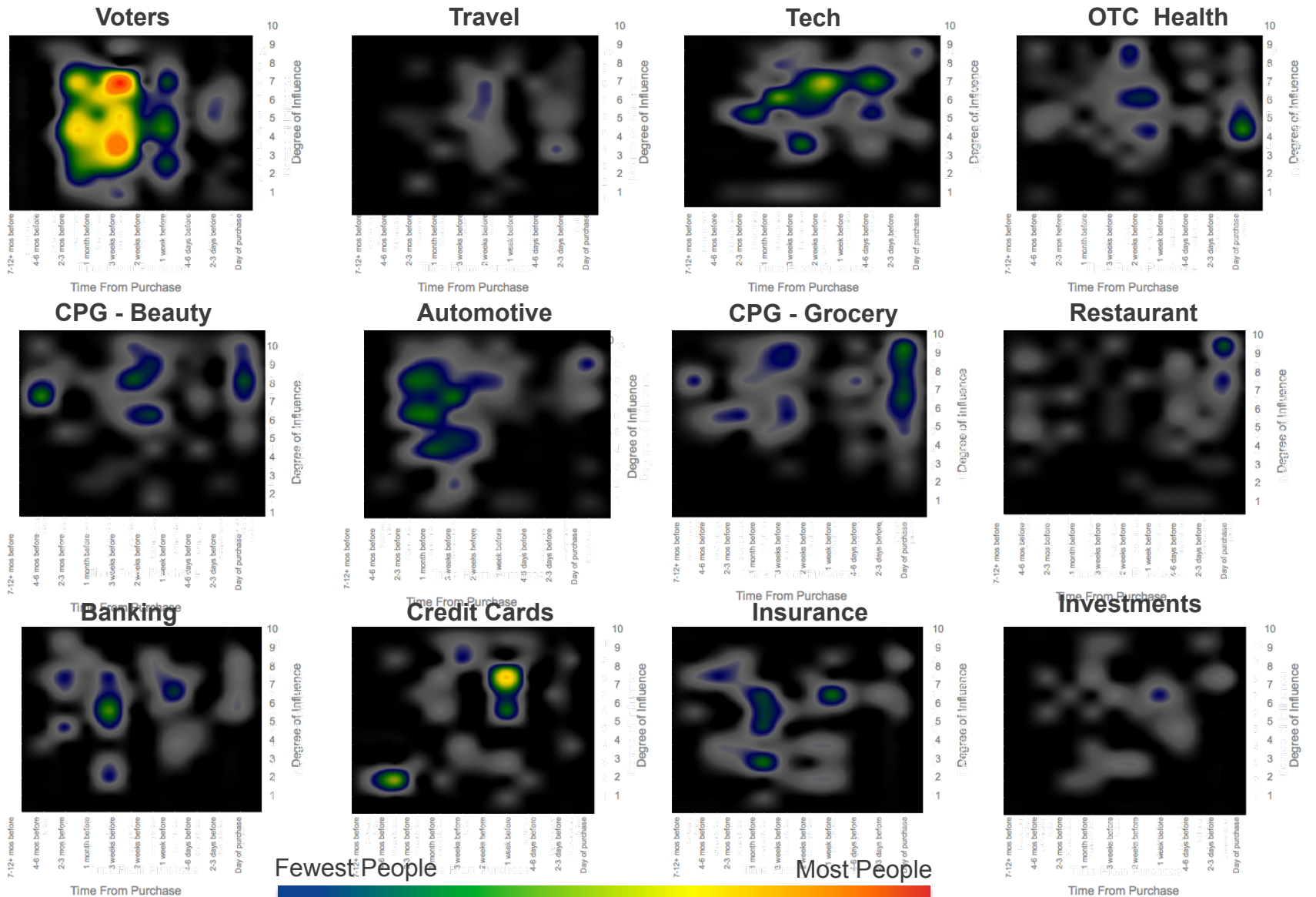
Talked with friends & family – category comparison



Saw TV Ads – category comparison



Newspaper Ads – category comparison



Fewest People

Most People

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

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