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?

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

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

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

Source: Google/Shopper Sciences, Zero Moment of Macro Study, Apr 2011
N = 5,000  www.google.com/think/insights
Talked with friends & family – category comparison

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

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

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