

## 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

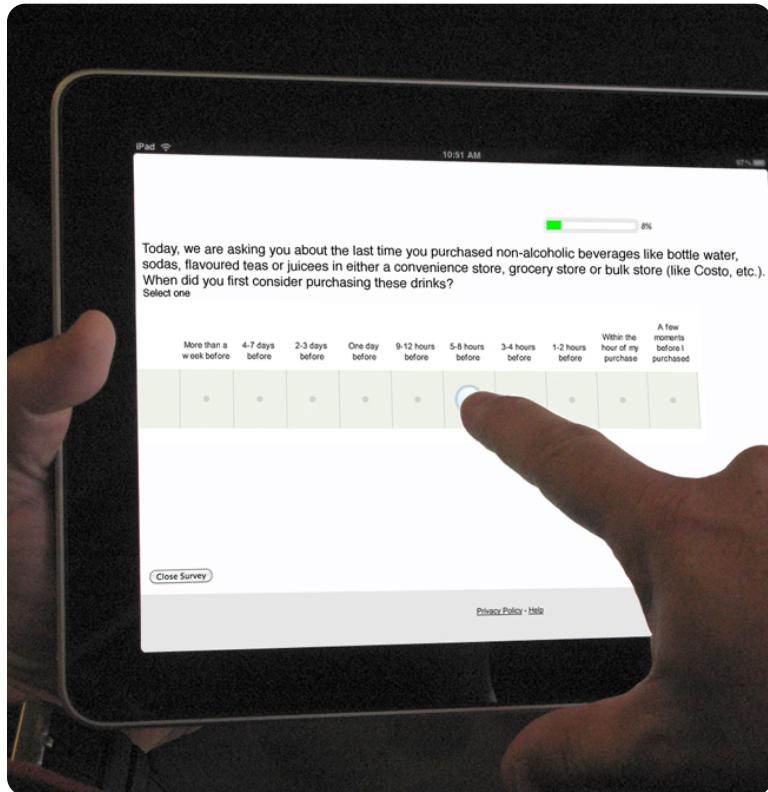
Fielded in March 2011 in the US

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

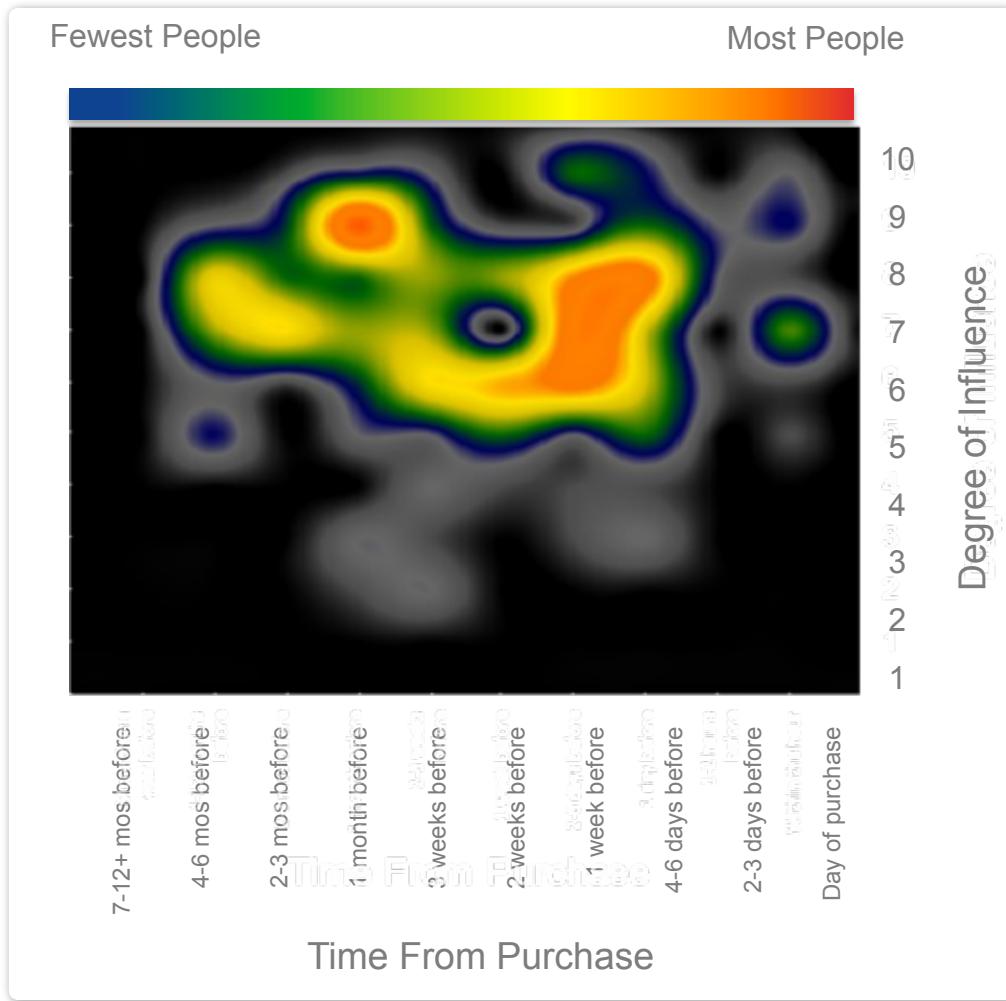
What traditional and new media sources did shoppers use to help them decide on their purchases?

## 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



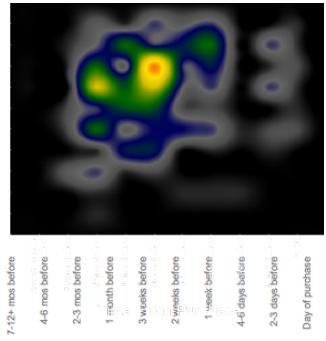
What's the role of search engines to shoppers?

- **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

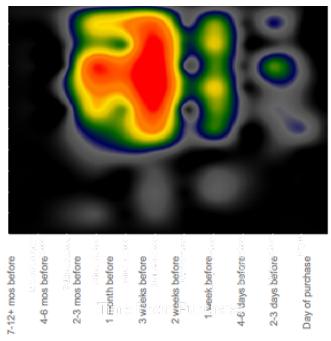
# Voters

Fewest People

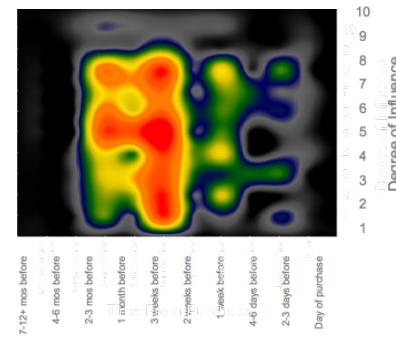
Most People



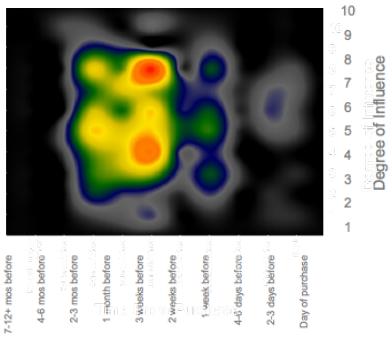
**Searched online/  
Used a search engine**



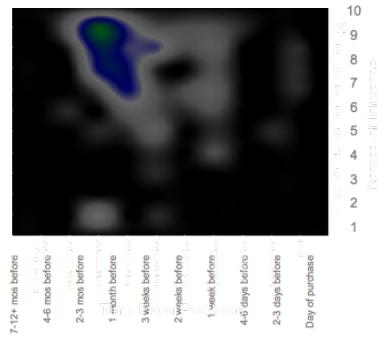
**Talked with friends &  
family**



**Saw advertisements  
on television**

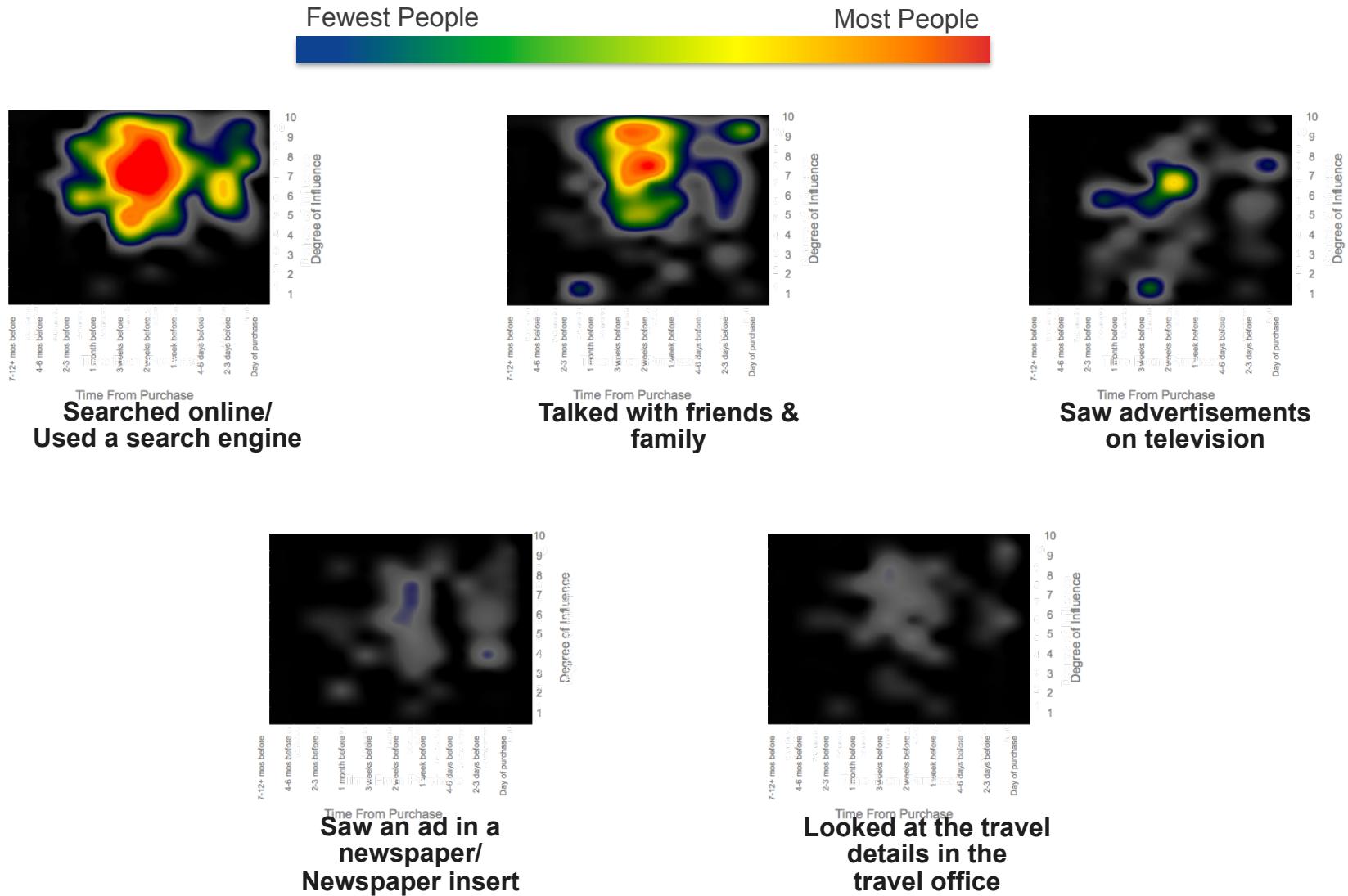


**Saw an ad in a  
newspaper/  
Newprint insert**



**Talked with candidate/  
Candidate  
representative in  
person**

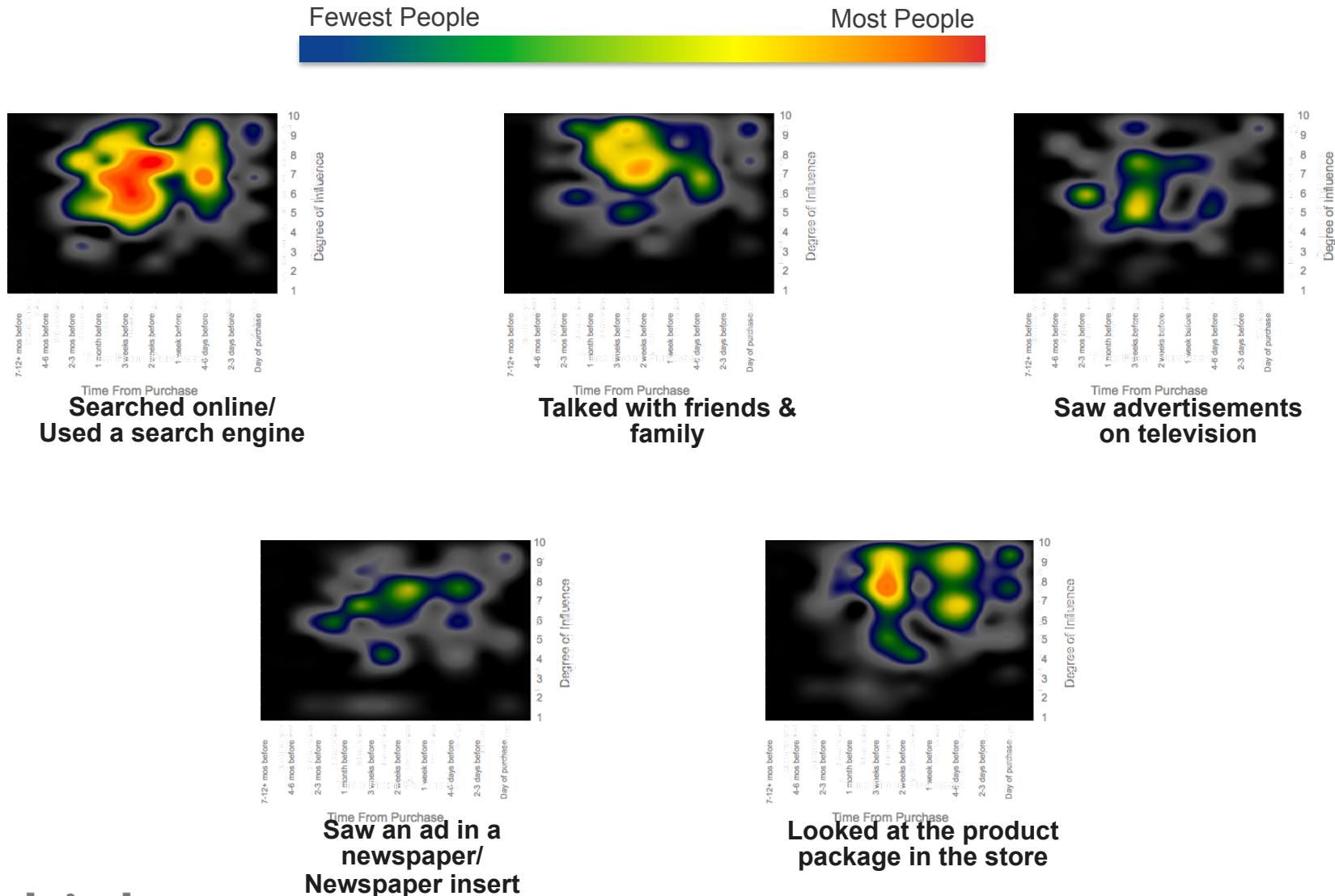
# Travel



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

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# Tech



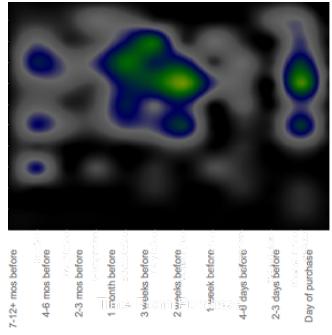
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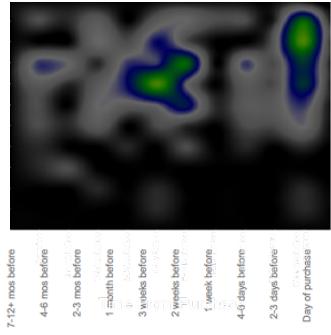
# OTC Health

Fewest People

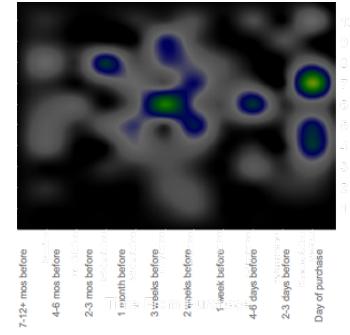
Most People



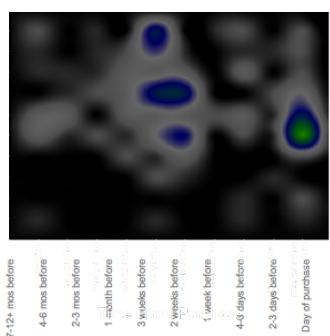
**Searched online/  
Used a search engine**



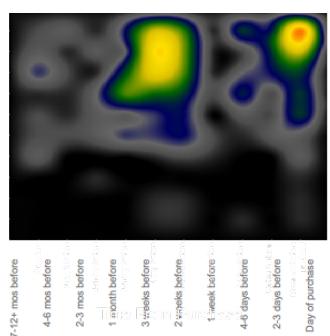
**Talked with friends &  
family**



**Saw advertisements  
on television**



**Saw an ad in a  
newspaper/  
Newspaper insert**



**Looked at the product  
package in the store**

**think  
with Google®**

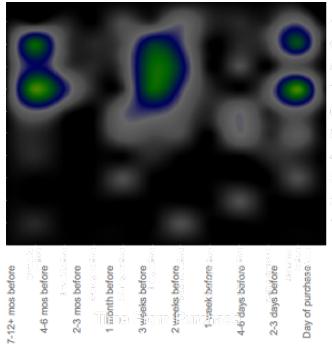
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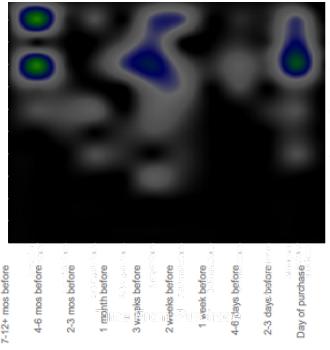
# CPG Beauty/Personal Care

Fewest People

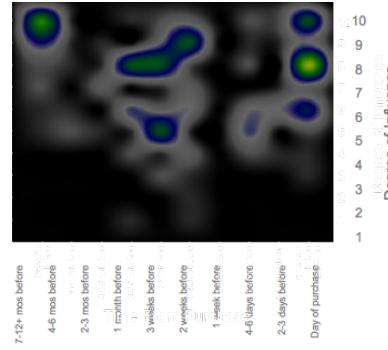
Most People



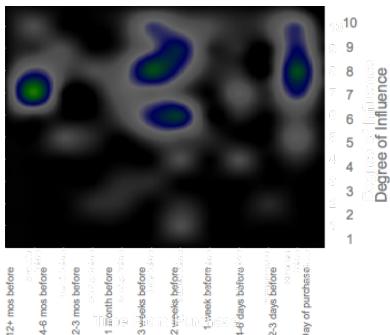
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Used a search engine**



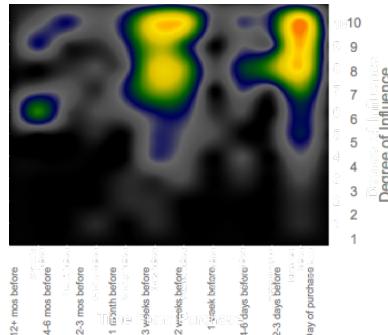
**Talked with friends &  
family**



**Saw advertisements  
on television**



**Saw an ad in a  
newspaper/  
Newprint insert**



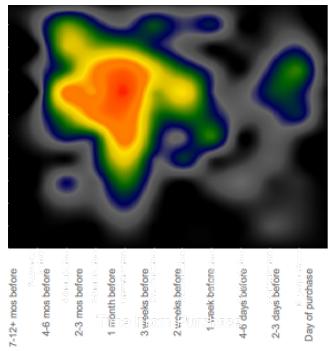
**Looked at the product  
package in the store**

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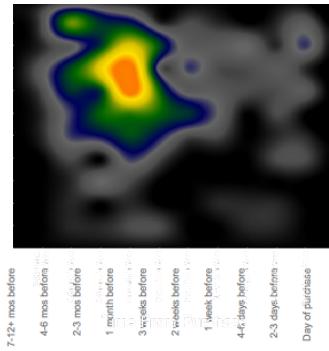
# Automotive

Fewest People

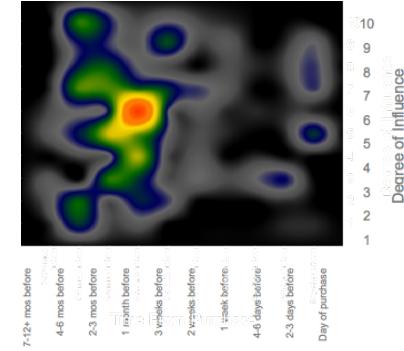
Most People



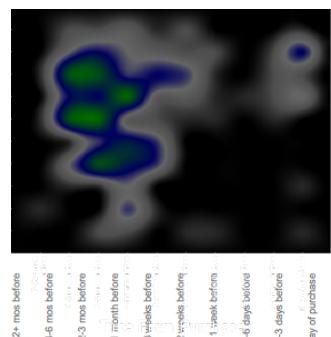
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Used a search engine**



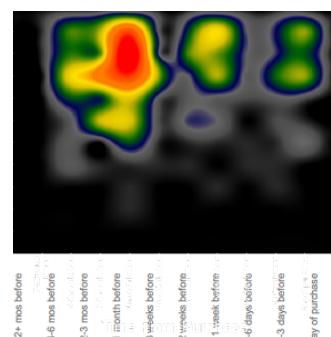
**Talked with friends &  
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**Saw advertisements  
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**Saw an ad in a  
newspaper/  
Newspaper insert**

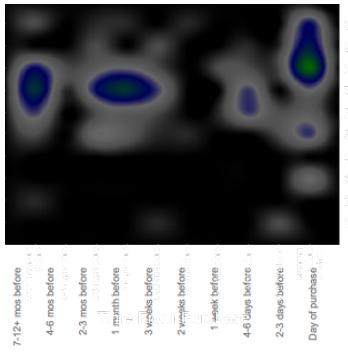


**Looked at the  
automobiles at the  
dealership**

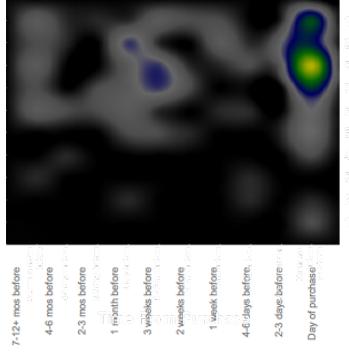
# CPG Grocery

Fewest People

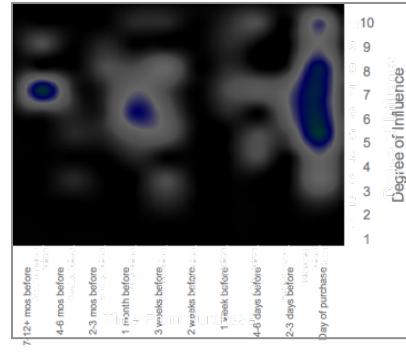
Most People



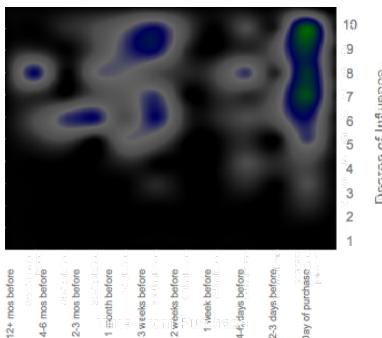
**Searched online/  
Used a search engine**



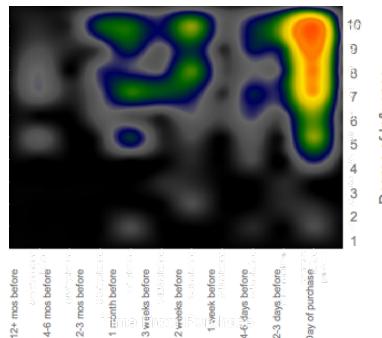
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**Saw advertisements  
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**Saw an ad in a  
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Newspaper insert**



**Looked at the product  
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**think  
with Google®**

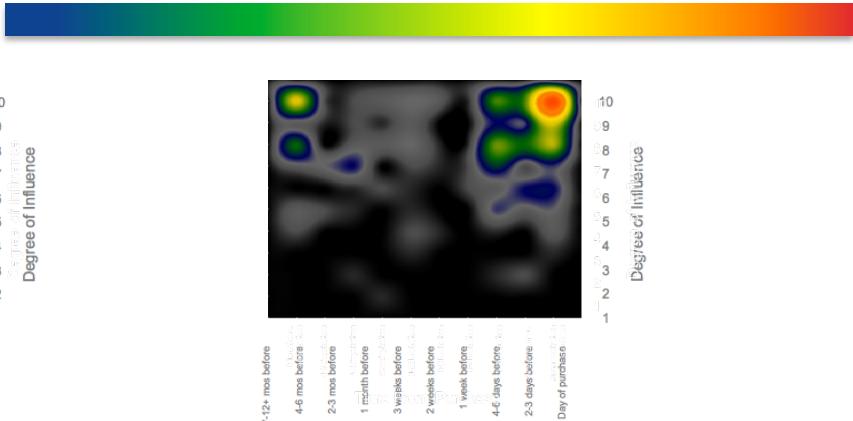
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# Restaurant

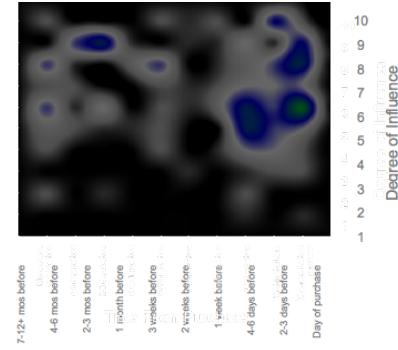
Fewest People

Most People

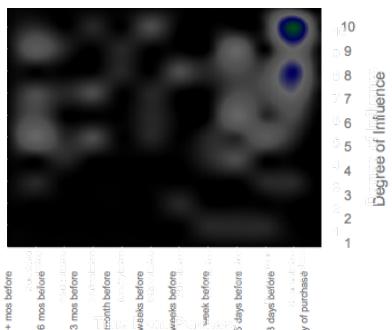


**Searched online/  
Used a search engine**

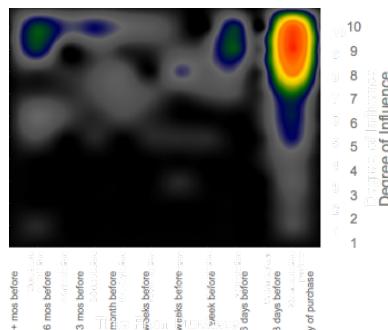
**Talked with friends &  
family**



**Saw advertisements  
on television**

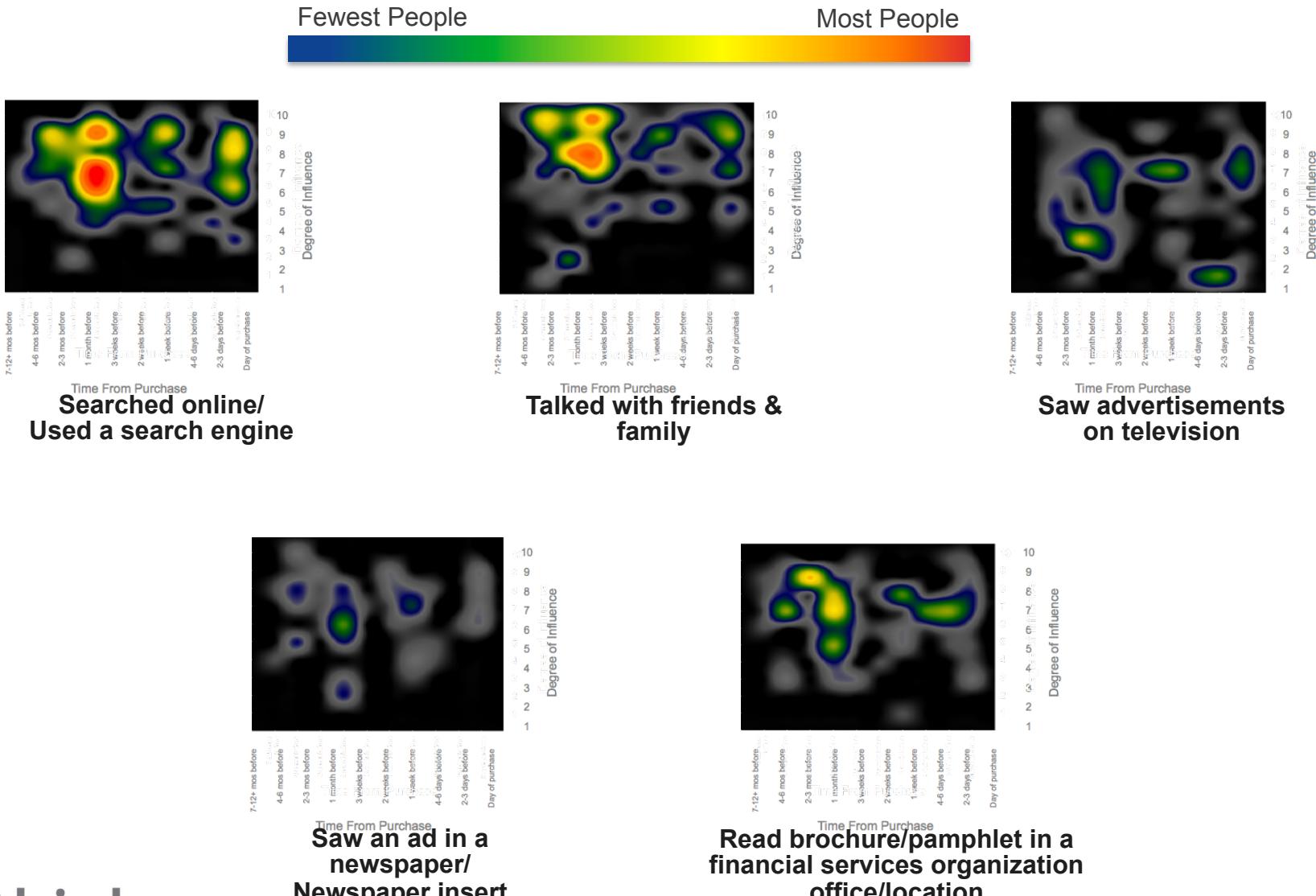


**Saw an ad in a  
newspaper/  
Newspaper insert**



**Read a menu in the  
restaurant**

# Banking



think  
with Google

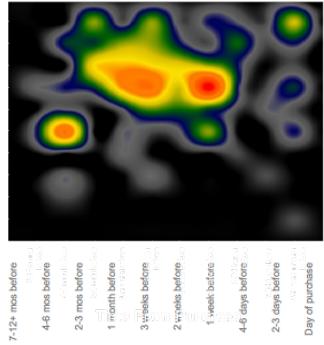
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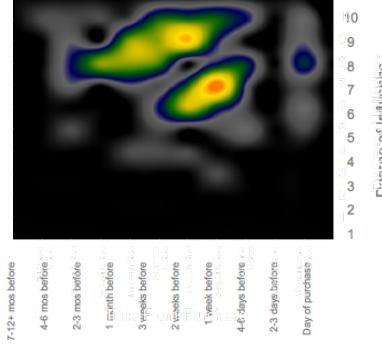
# Credit Cards

Fewest People

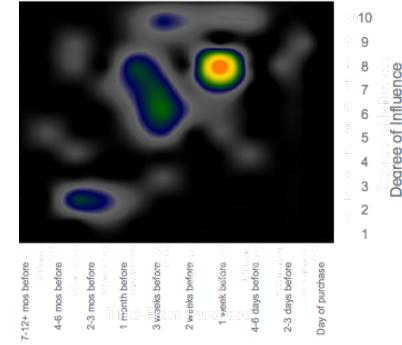
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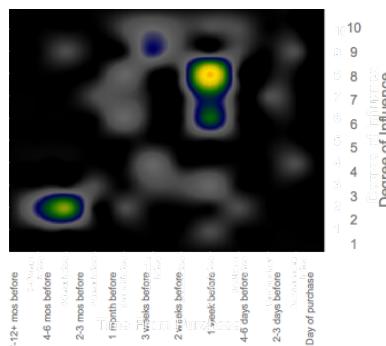
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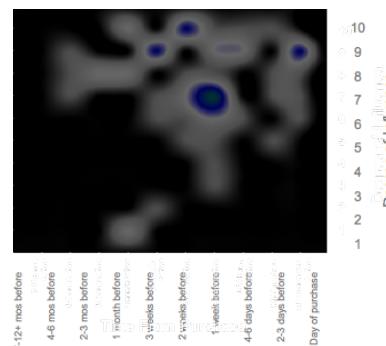
**Talked with friends &  
family**



**Saw advertisements  
on television**



**Saw an ad in a  
newspaper/  
Newspaper insert**

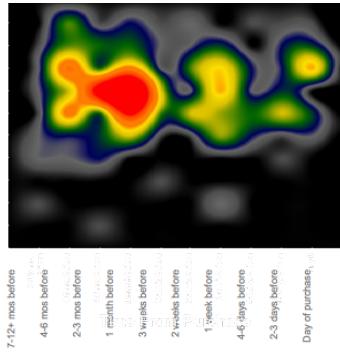


**Read brochure/pamphlet in a credit  
card company office/location**

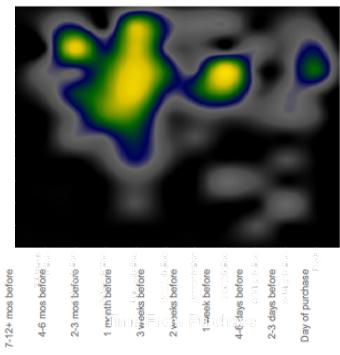
# Insurance

Fewest People

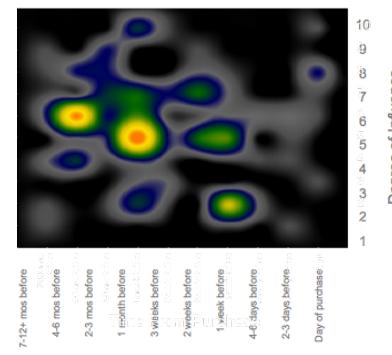
Most People



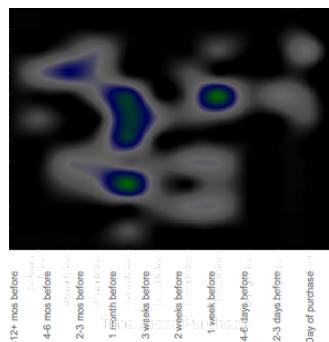
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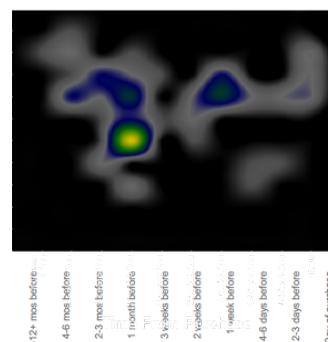
**Talked with friends &  
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**Saw advertisements  
on television**



**Saw an ad in a  
newspaper/  
Newspaper insert**

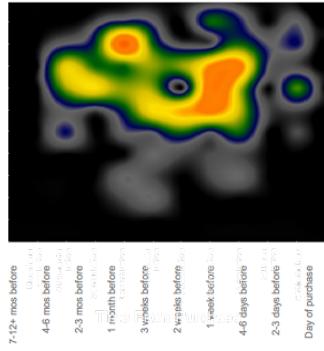


**Read brochure/pamphlet in an  
insurance company office/location**

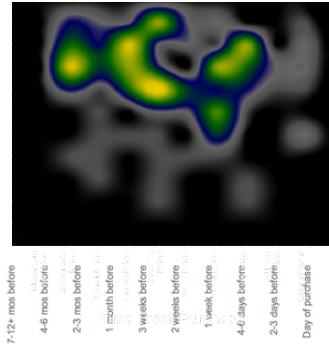
# Investments

Fewest People

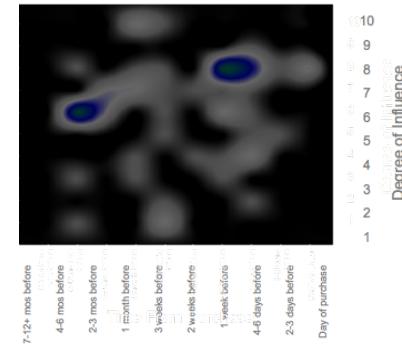
Most People



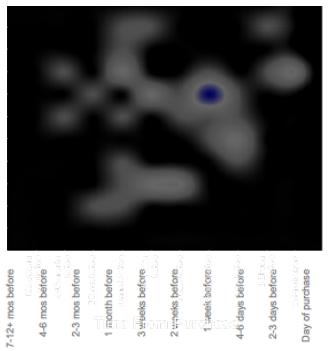
**Searched online/  
Used a search engine**



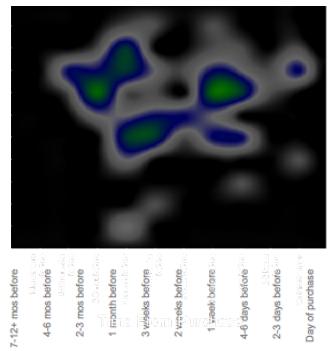
**Talked with friends &  
family**



**Saw advertisements  
on television**



**Saw an ad in a  
newspaper/  
Newspaper insert**



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

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