



The Zero Moment of Truth Automotive Study

Google/Shopper Sciences
April 2011

Summary

- The path to purchase in the automotive category is quite extensive. The vast majority of shoppers take several months to go from decision to action.
- During this time, shoppers are using a wide array of sources. FMOT, ZMOT and Stimulus all have above average usage.
 - Mobile and Online Social source nodes are the only ones that do not pass the average. However, compared to Online Social and Mobile usage in other categories, the usage for Automotive is quite strong.
- Shoppers clearly identify in-person experiences as the most influential – test driving, visiting a dealership, etc.
 - The challenge for brands is generating enough influence during all of the pre-research (ZMOT) sources they interact with to get them to go to a dealership in the first place.
- SMOT participation is incredibly high in this category. Shoppers are eager to talk about their experience after going through such a lengthy process.
- Age truly determines different behavior. Younger shoppers are using many more sources and participating in digital and mobile at a higher rate.
 - However, the younger shopper also has higher expectations and more frustrations with their Internet experience.

Objectives & Methodology

How is **auto shopper behavior** changing in a digitally powered world?

What **role** do **new media** like social & mobile in shopping for automobiles?

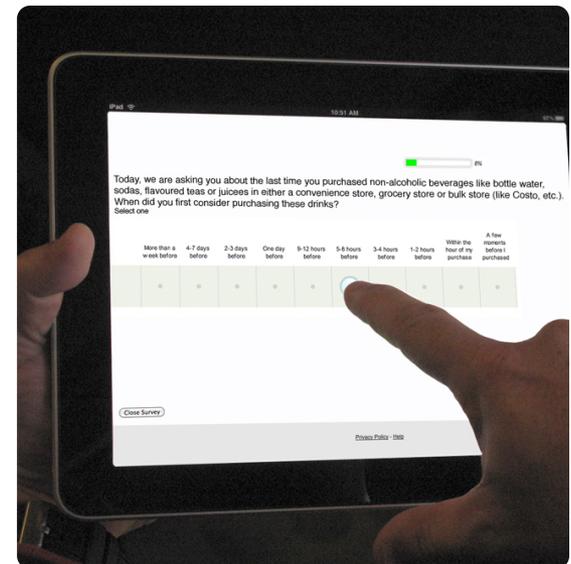
How are shoppers' expectations of the **physical dealership** changing?

Online shopper surveys with interactive
game-like construct

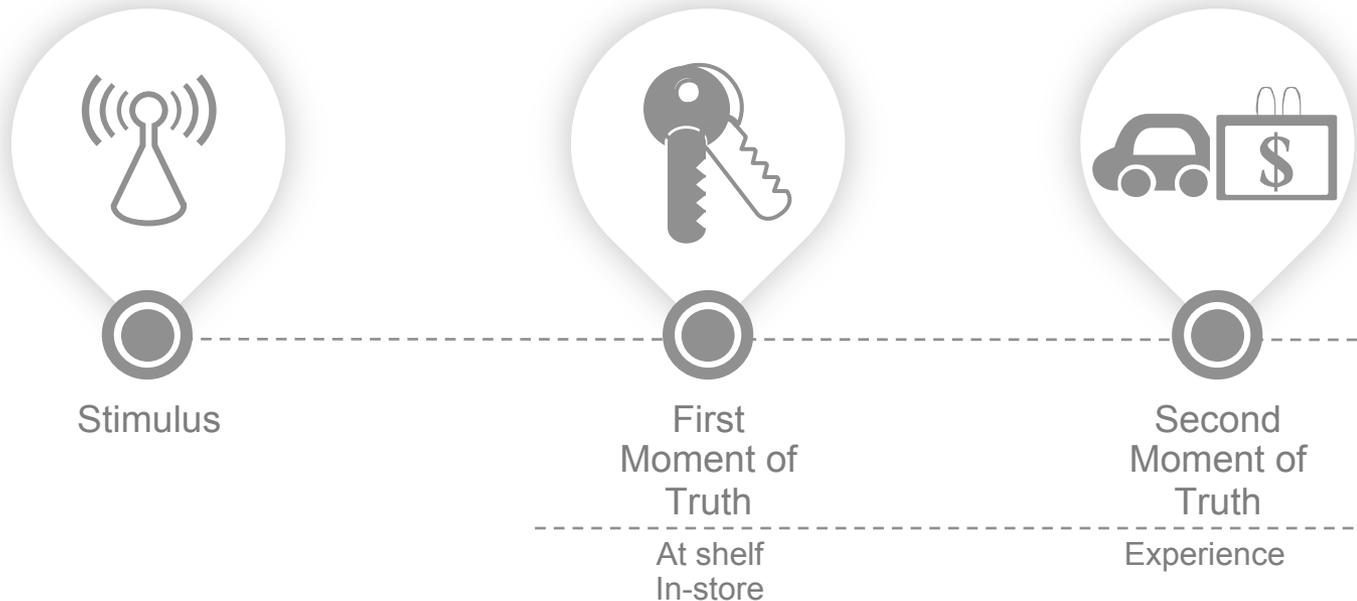
Fielded in March 2011 in the US

Adults who purchased a new
automobile in the past 2 years

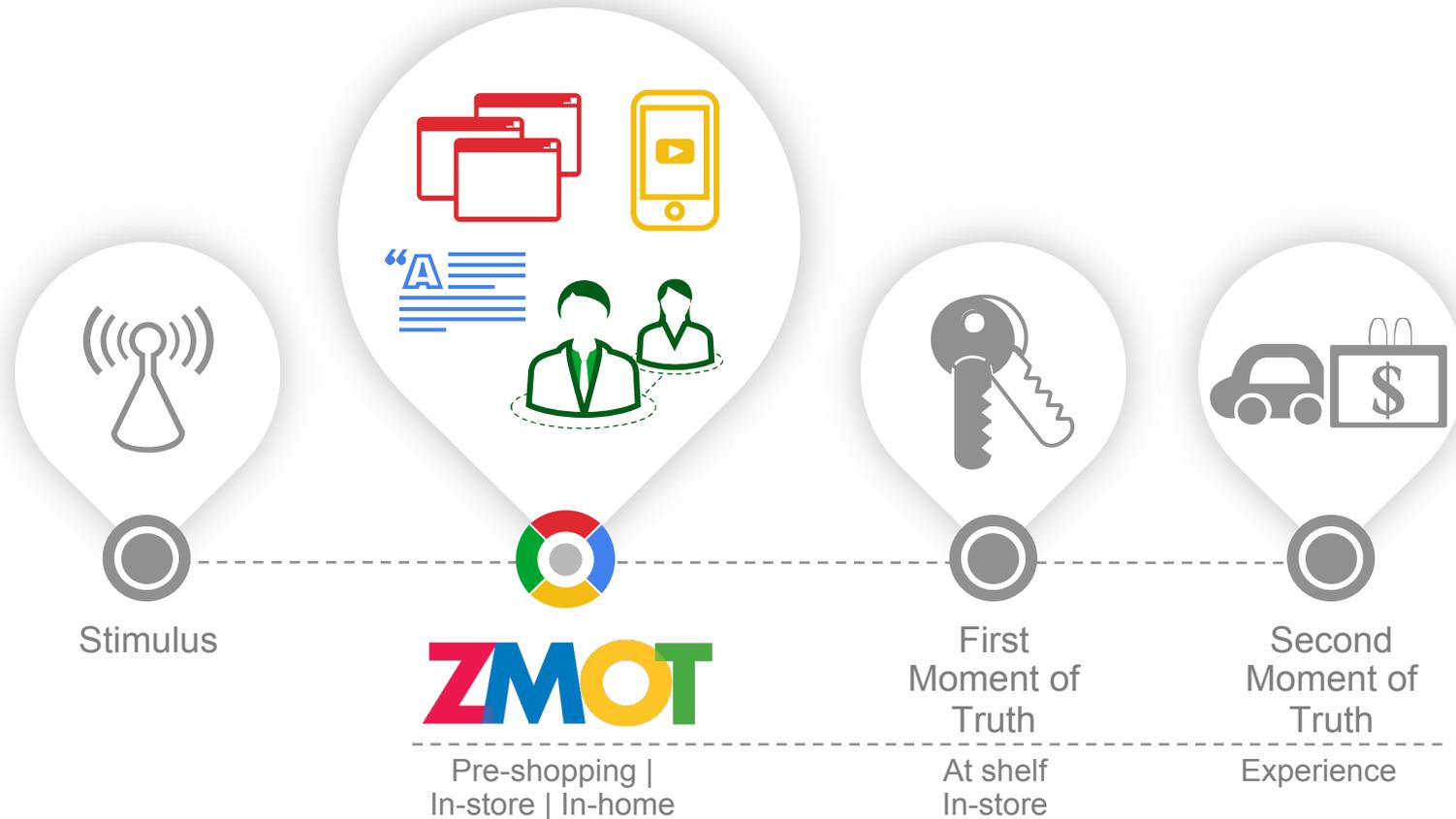
N=500 shoppers



Traditional 3-Step Mental Model of Marketing



The New Mental Model of Marketing



We asked auto shoppers...

When? Purchase Timeline

How far in advance do shoppers start thinking about their auto purchase?

What? Source Usage

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

How? Influence

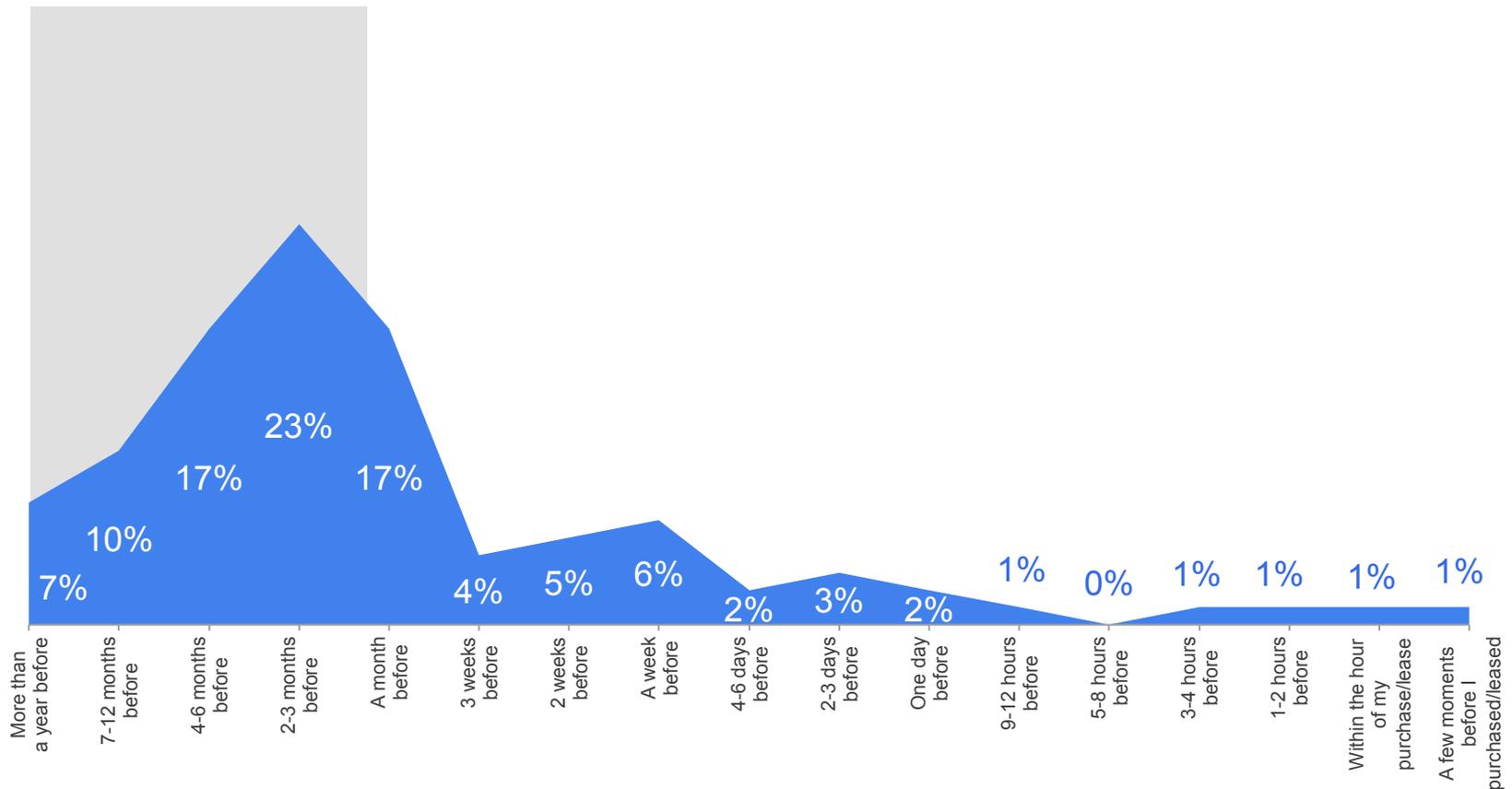
How influential were each of the sources in the ultimate decision making?

Why? Information-Seeking

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

Purchasing an automobile is a very considered decision for shoppers.

Length of Purchase Cycle



Auto shoppers used on average 18.2 sources of information to help them make their purchase decision

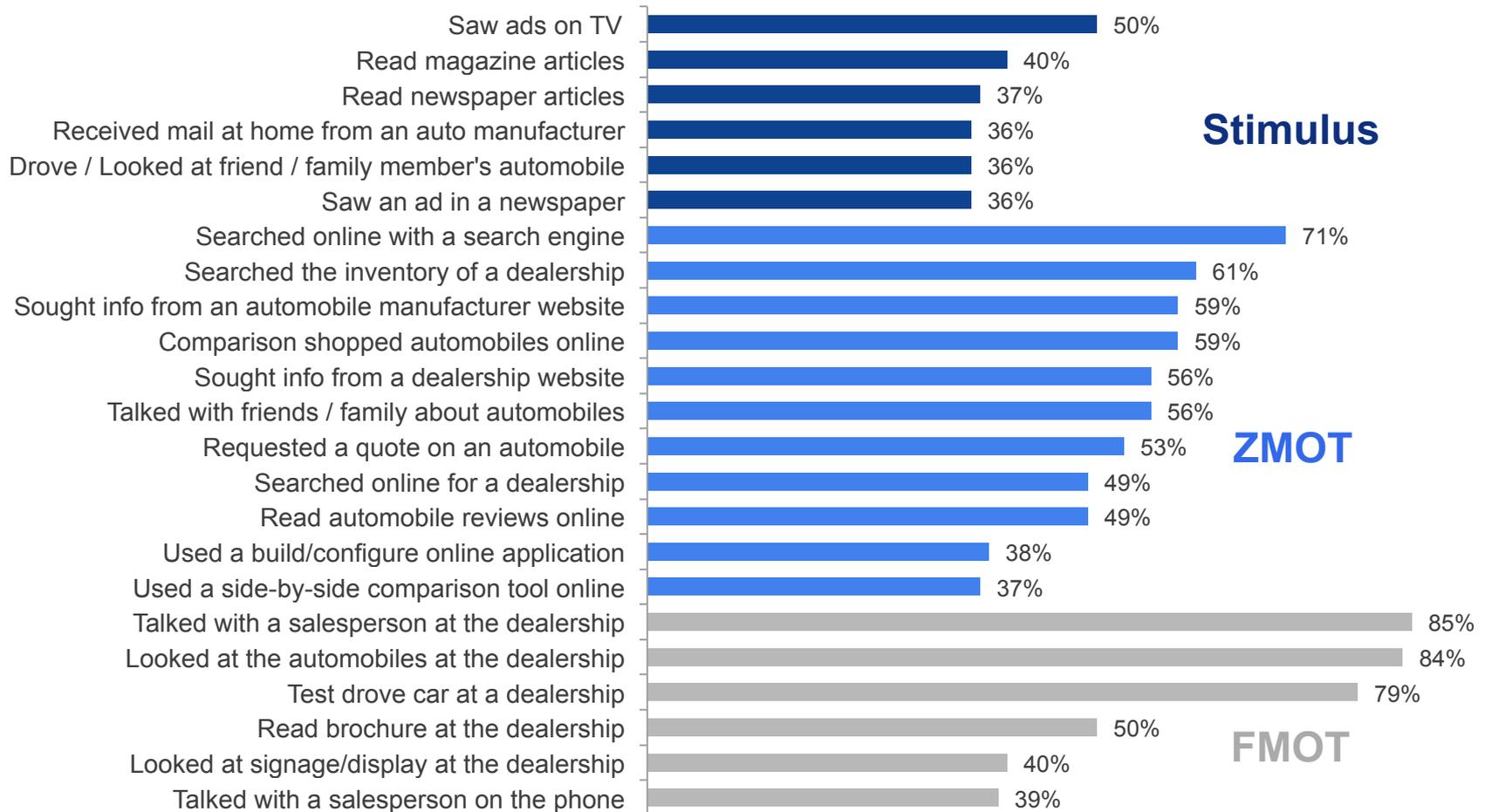
18.2
sources

34%
average usage

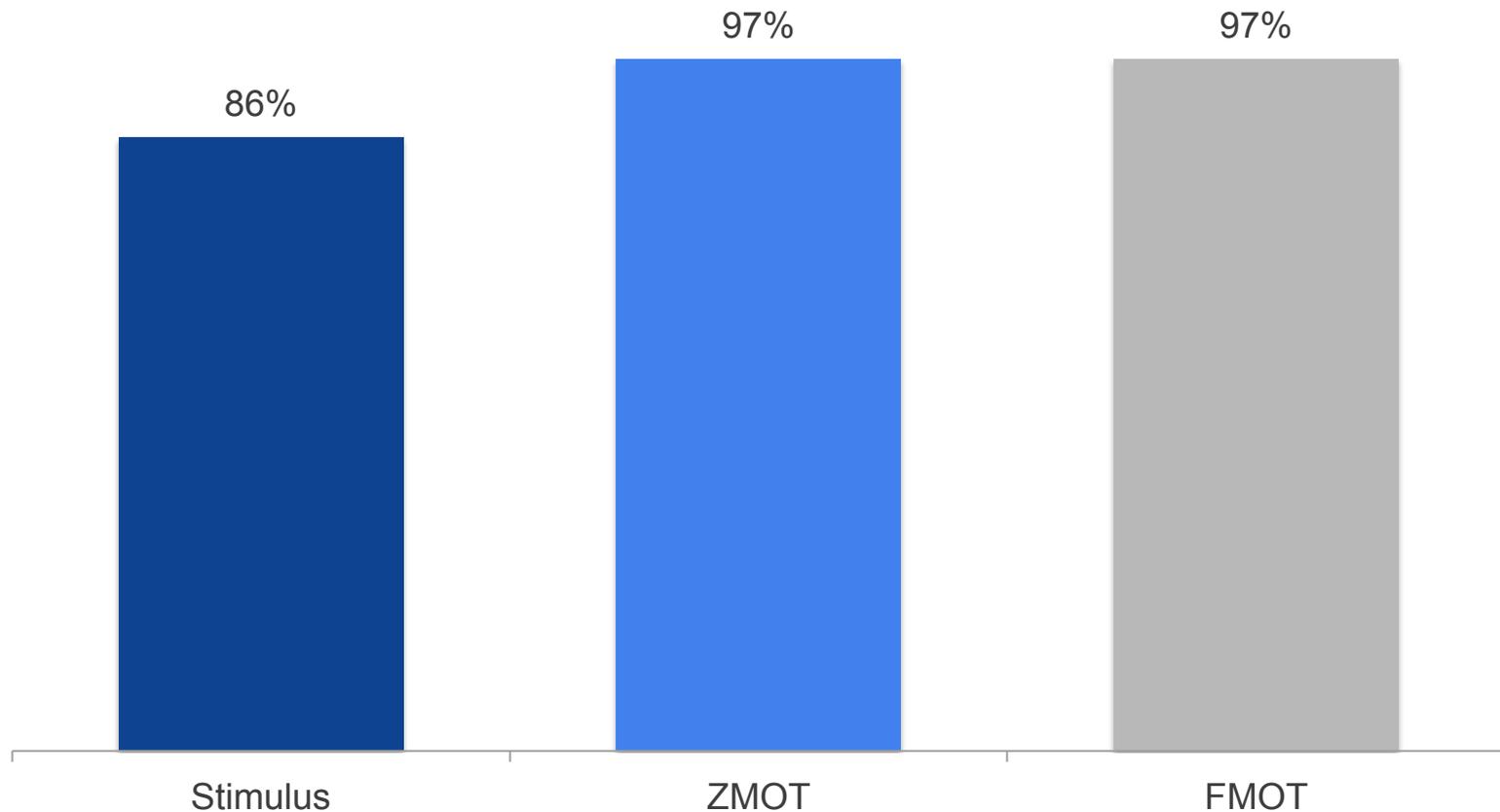
For any one source, on average 34% of shoppers used it.

Even among above average sources, ZMOT outpaces traditional avenues of research.

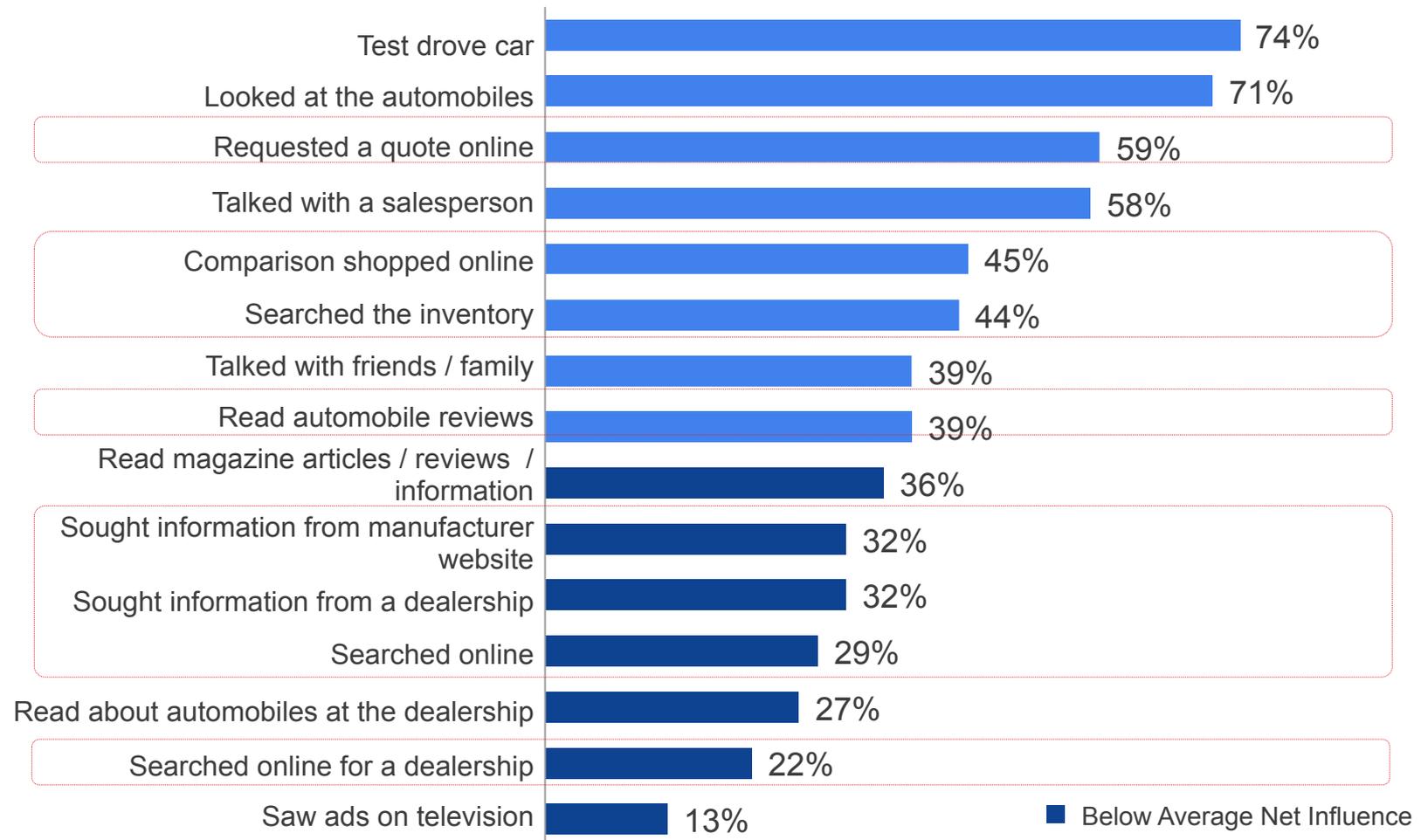
Sources Used – Above the 34% Average Usage Score



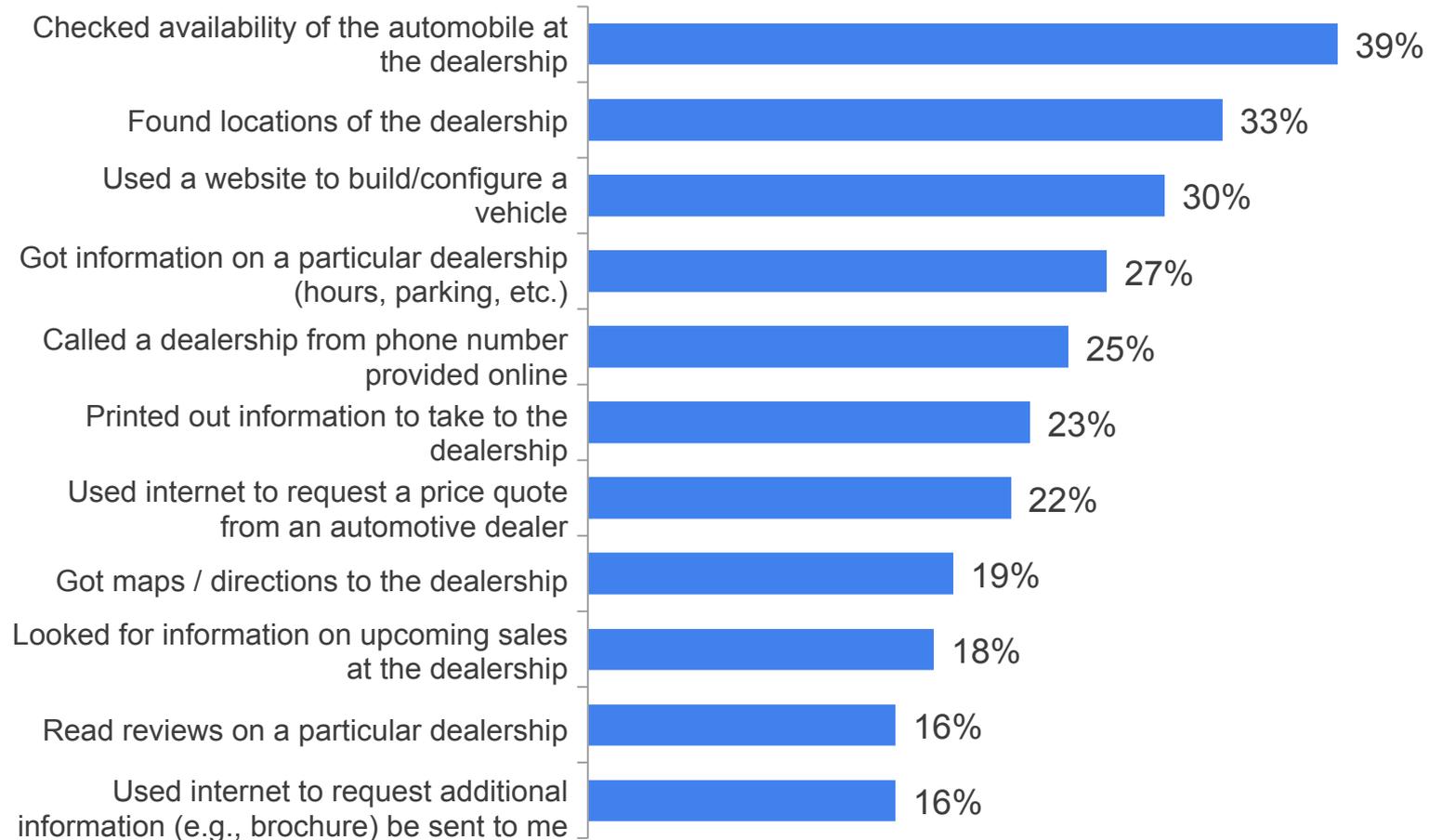
Shoppers rely on ZMOT sources as much as FMOT



Net Influence – Top Sources

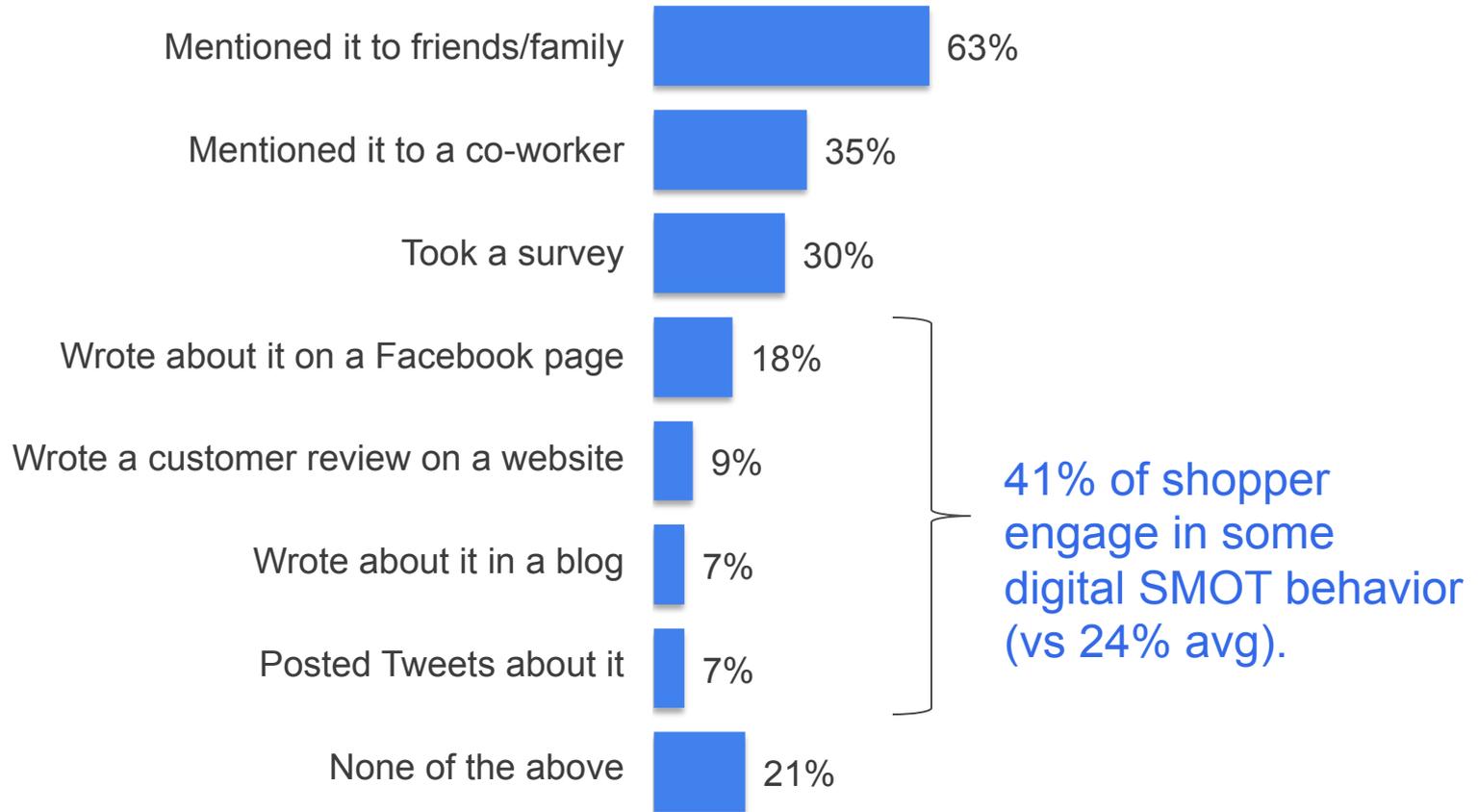


Top reasons for auto shoppers to consult the internet



Post Purchase Behavior

Auto shoppers are excited to share their purchases online

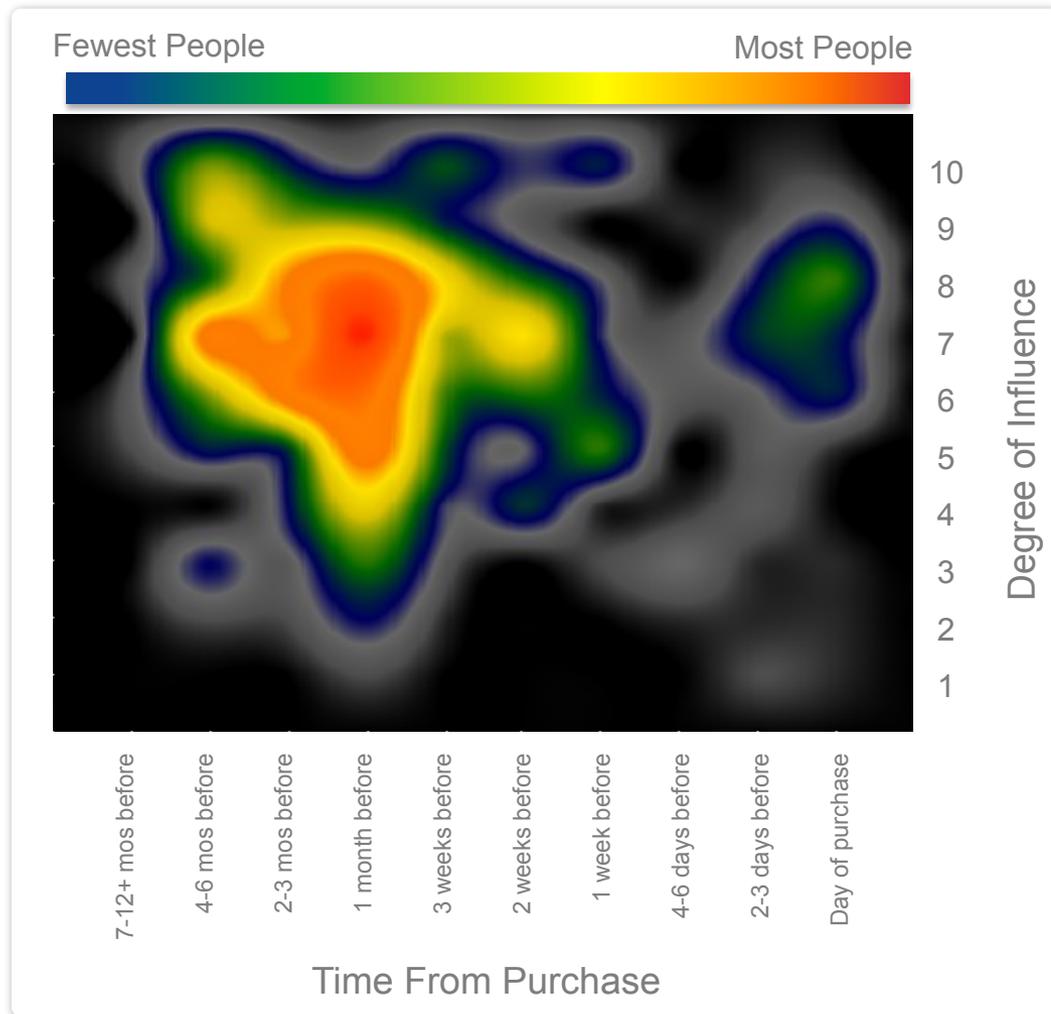




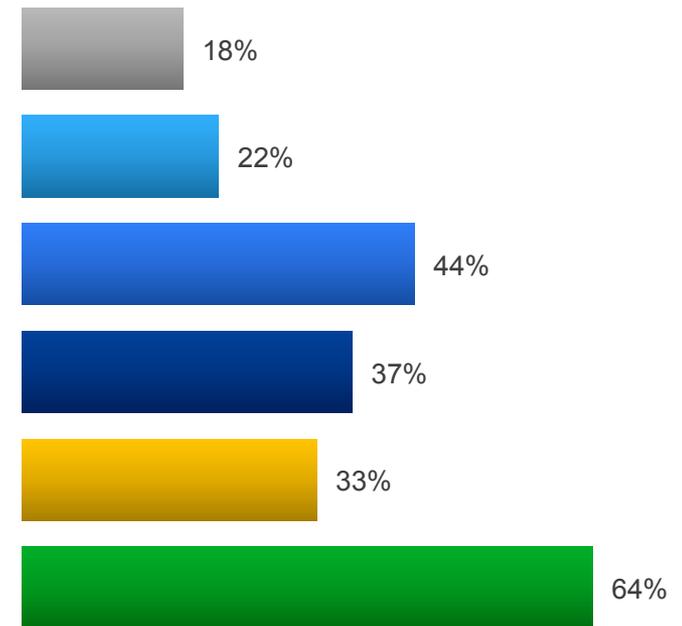
Heat Maps

The intersection of when, what, how and why

Searched via Search Engine (ZMOT)

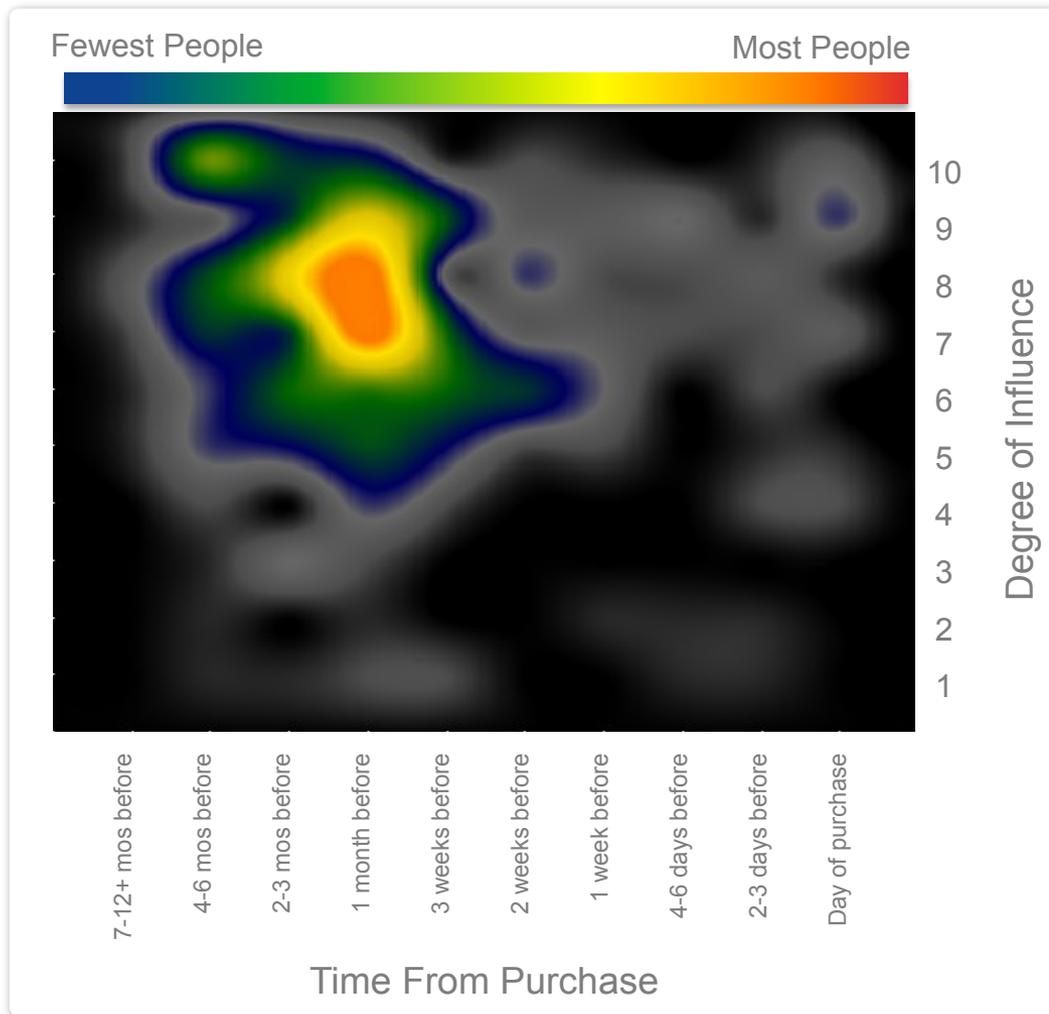


71% Usage 86% Repeat Usage

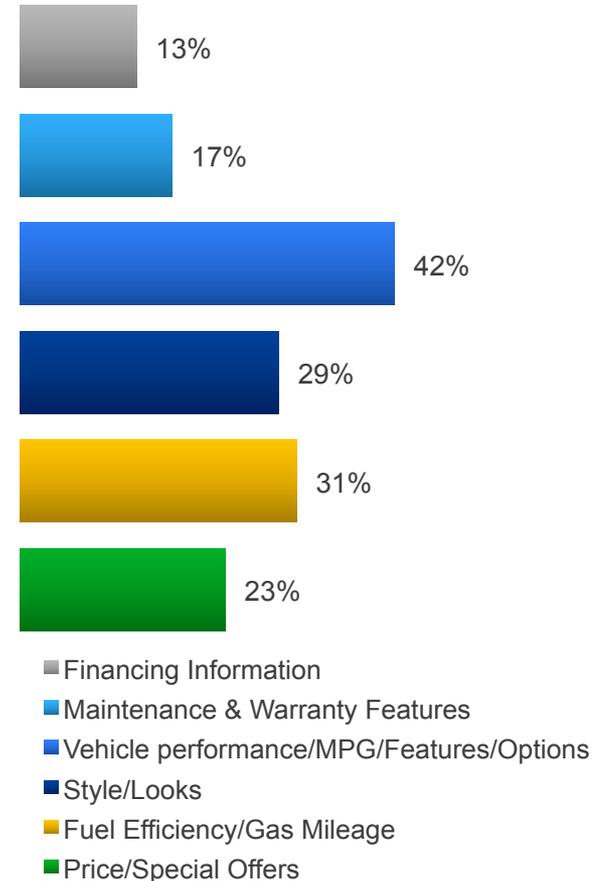


- Financing Information
- Maintenance & Warranty Features
- Vehicle performance/MPG/Features/Options
- Style/Looks
- Fuel Efficiency/Gas Mileage
- Price/Special Offers

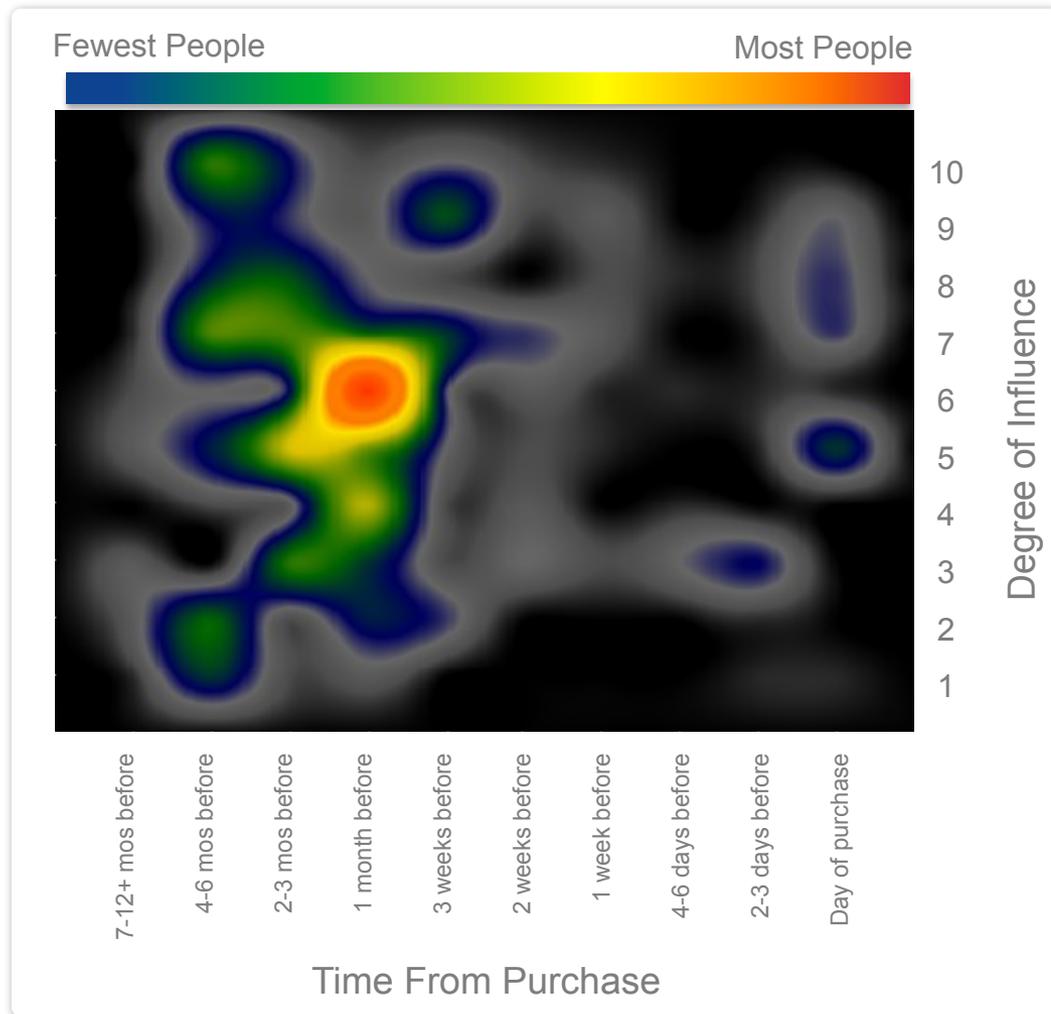
Talked with Friends & Family (ZMOT)



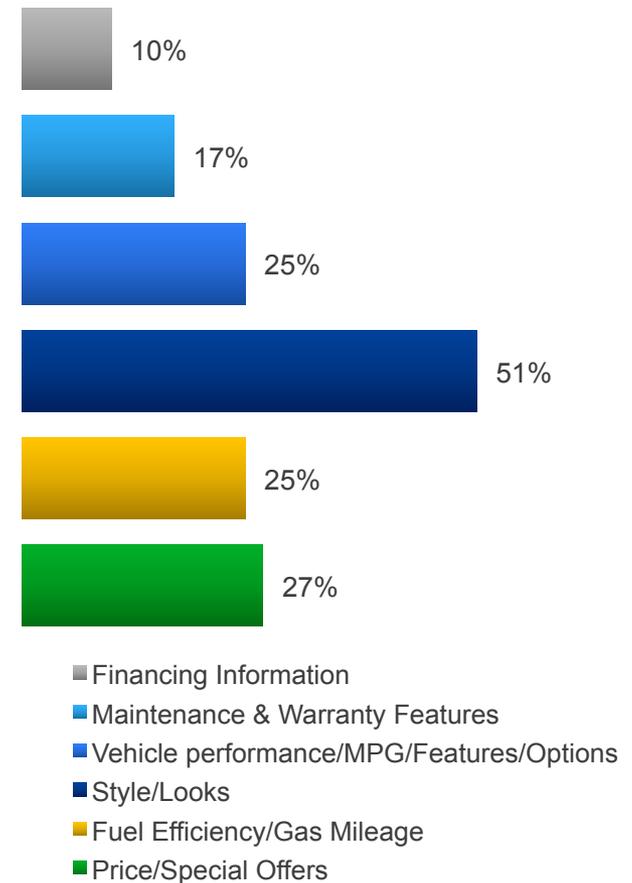
56% Usage 25% Repeat Usage



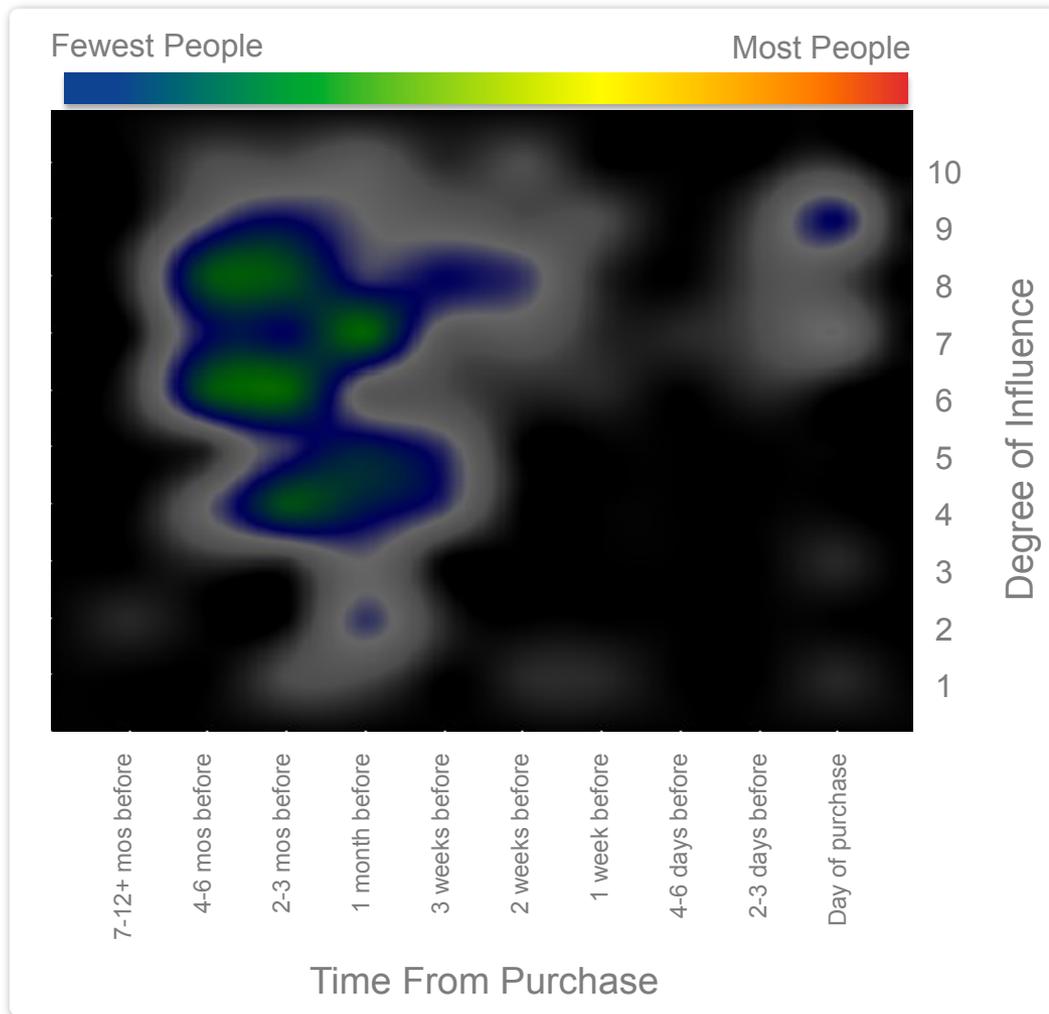
Saw Advertisements on Television (Stimulus)



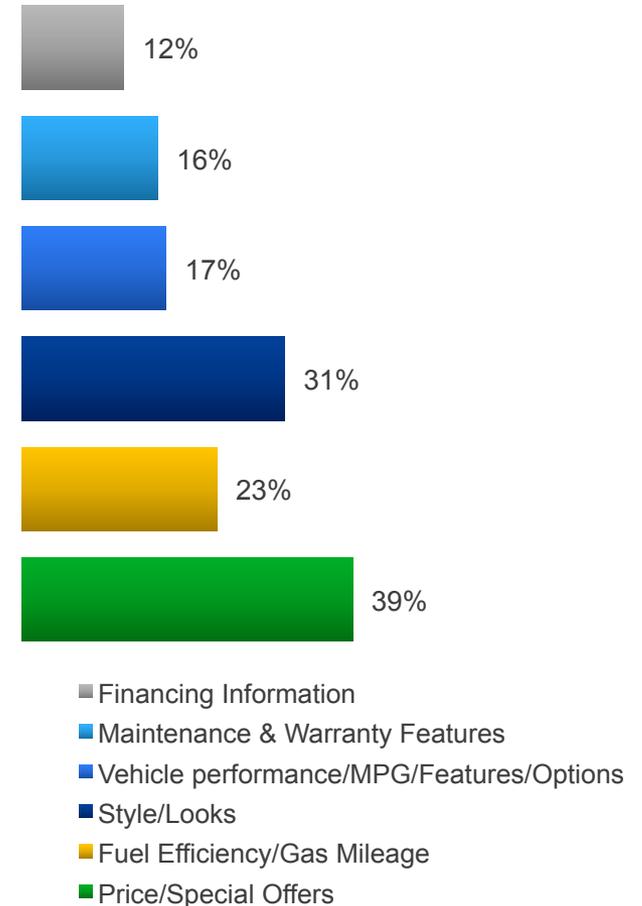
50% Usage 51% Repeat Usage



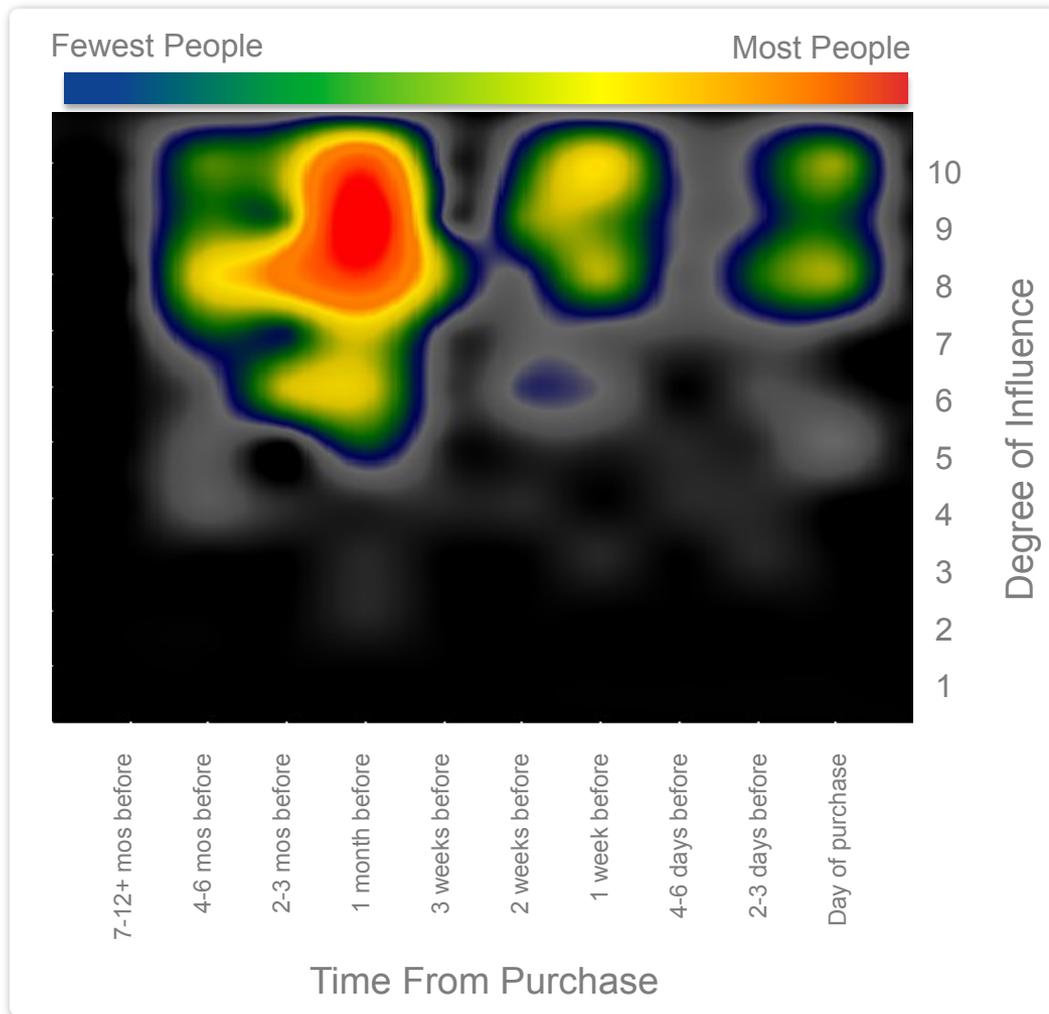
Saw an ad in a newspaper (Stimulus)



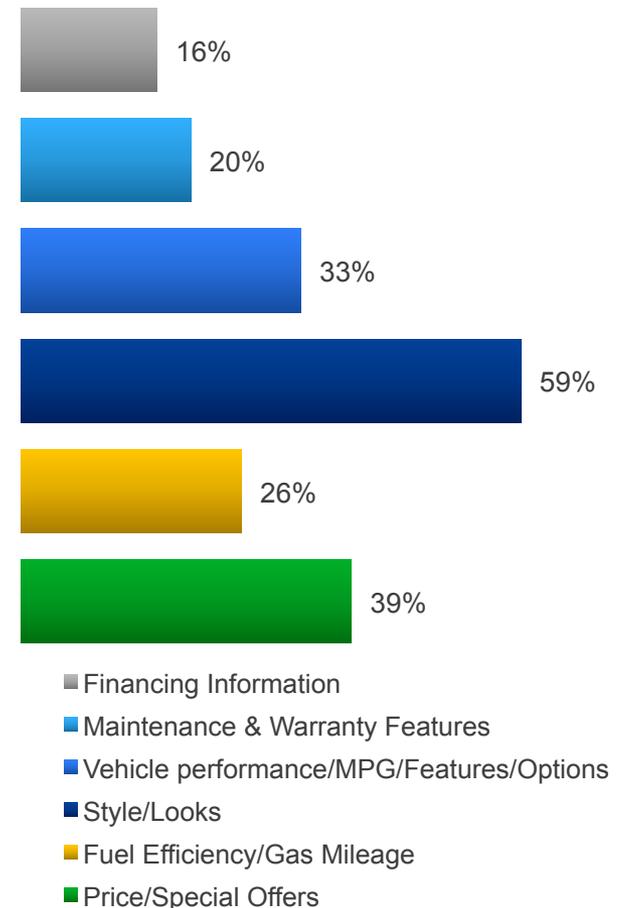
36% Usage 16% Repeat Usage



Looked at automobiles on site (FMOT)



84% Usage 22% Repeat Usage



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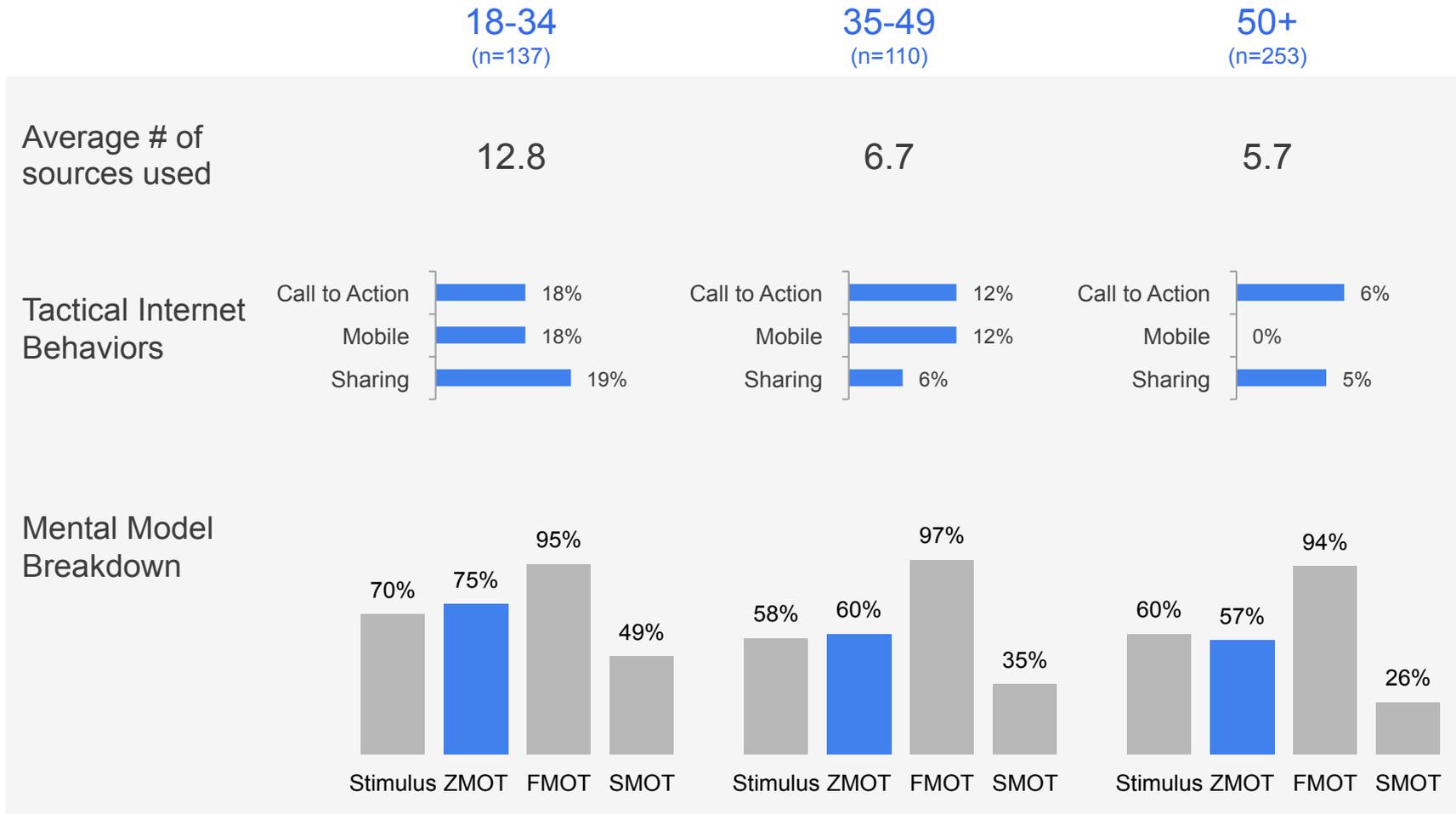


Appendix

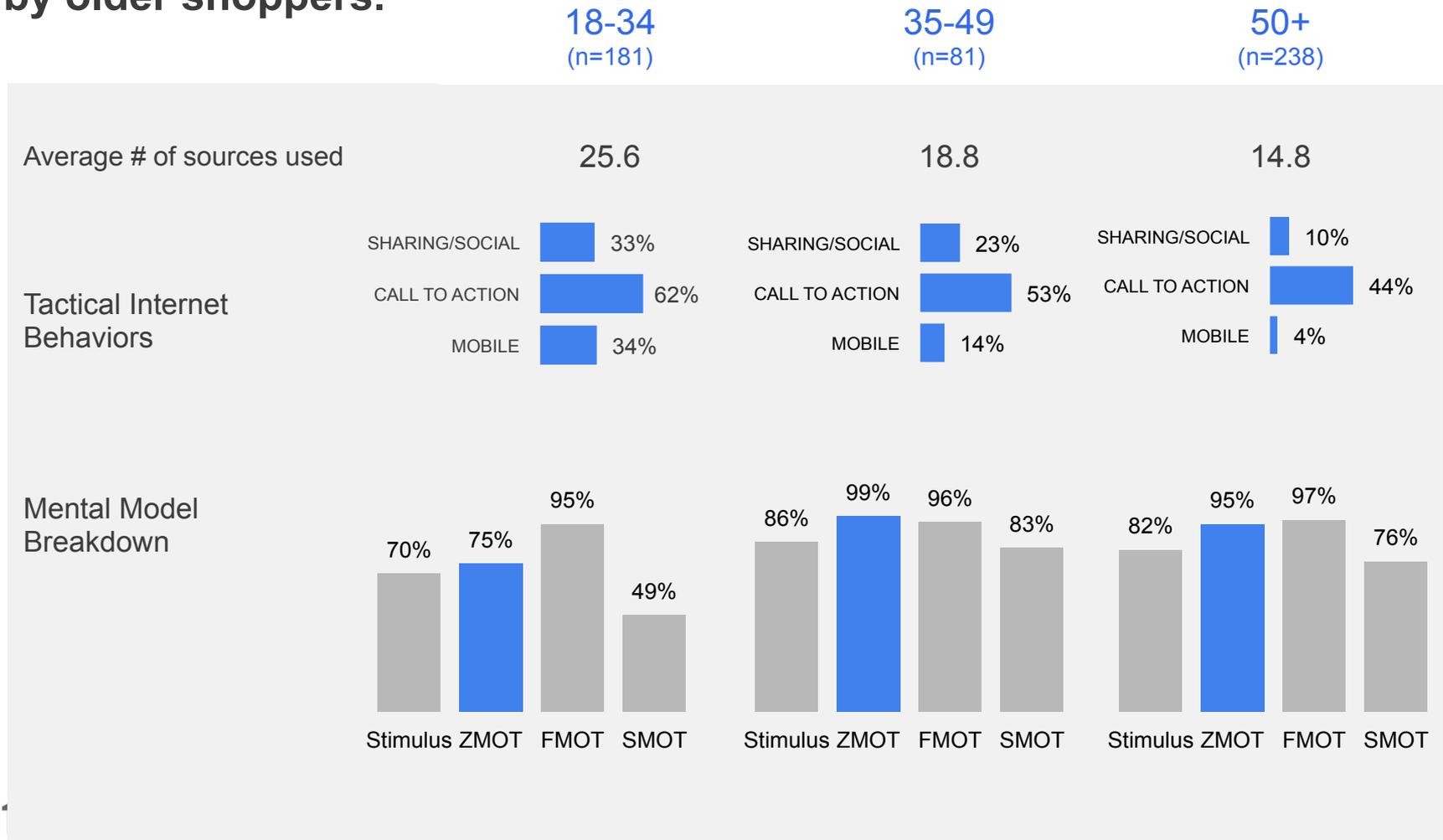


Auto shopping behavior by age, spend
and frequency

Younger shoppers use more than double the sources. They exhibit much more ZMOT, sharing and mobile behavior.



Younger shoppers are definitely more in tune with engaging the Internet and digital SMOT in their purchase experience. However, the Internet seems to come with some negativity for this group – a necessary component, but not as helpful or convenient as perceived by older shoppers.



Those who purchase cars more frequently tend to use more sources on average toward their purchase. Frequent buyers are more likely to employ online social and mobile sources.

YEARS OR LESS
(n=218)

MORE THAN 3 YEARS
(n=282)

