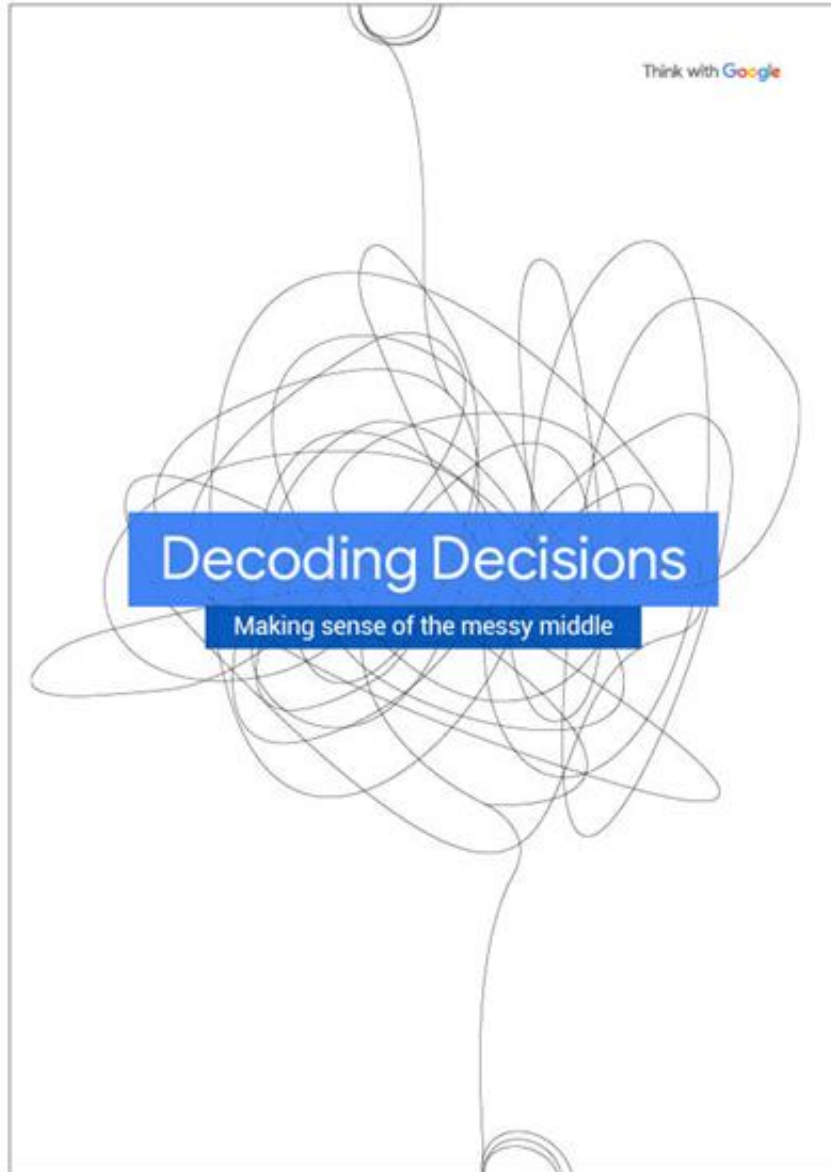




Decoding Decisions

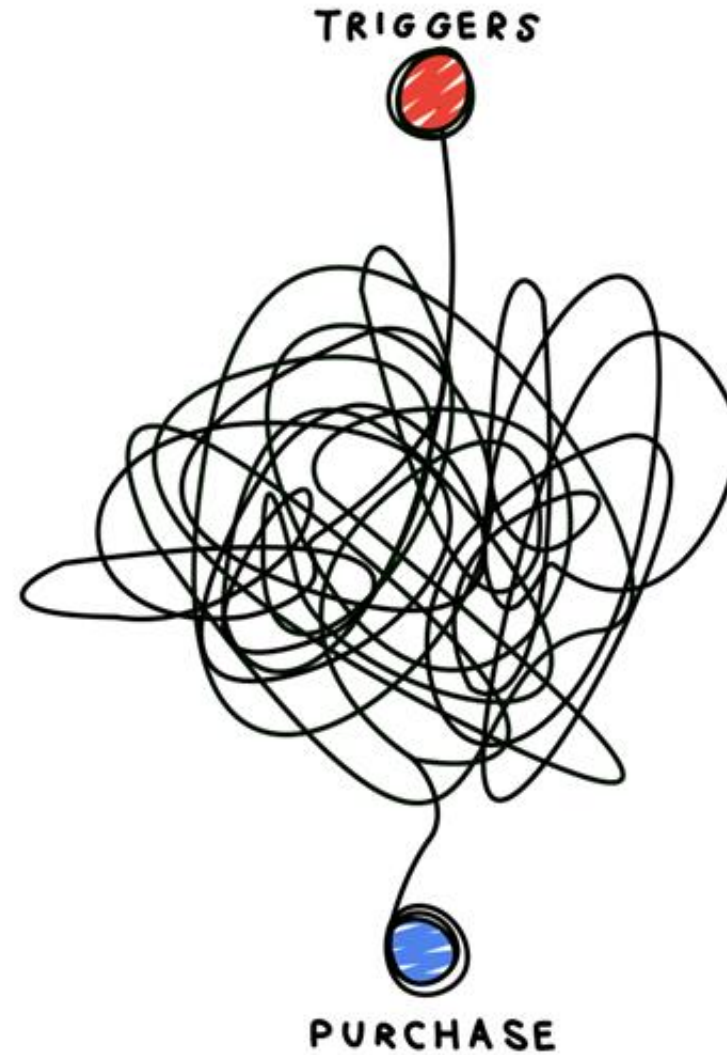
Making sense of the messy middle



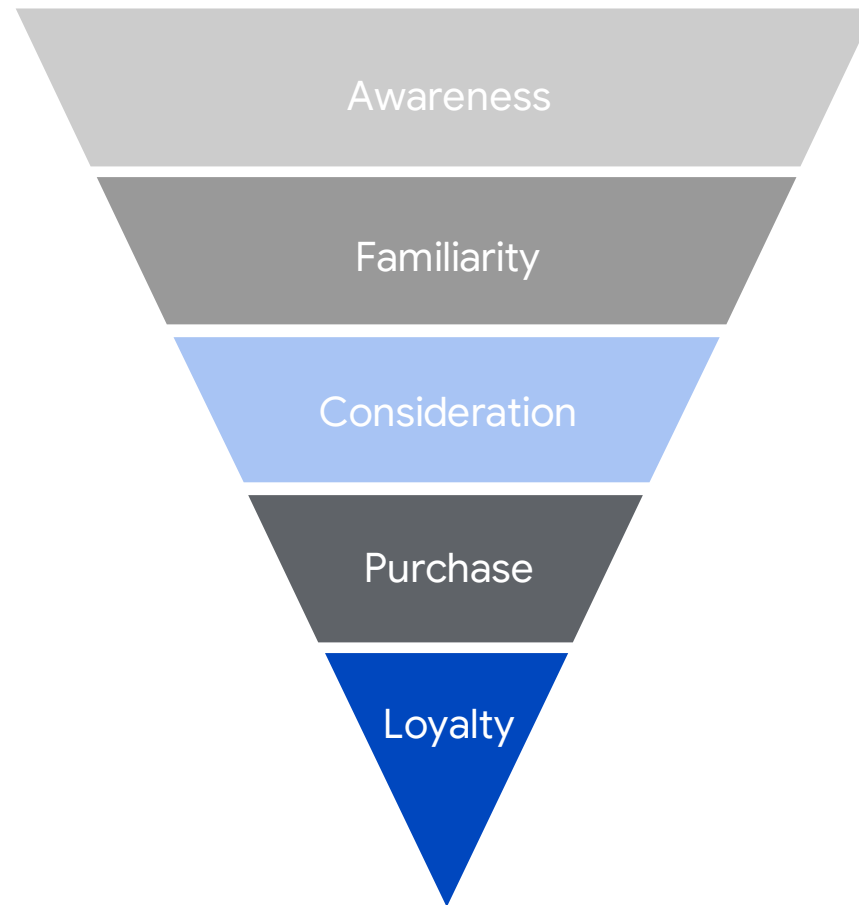
Download the
full research report:
g.co/think/messymiddle

Think with **Google**

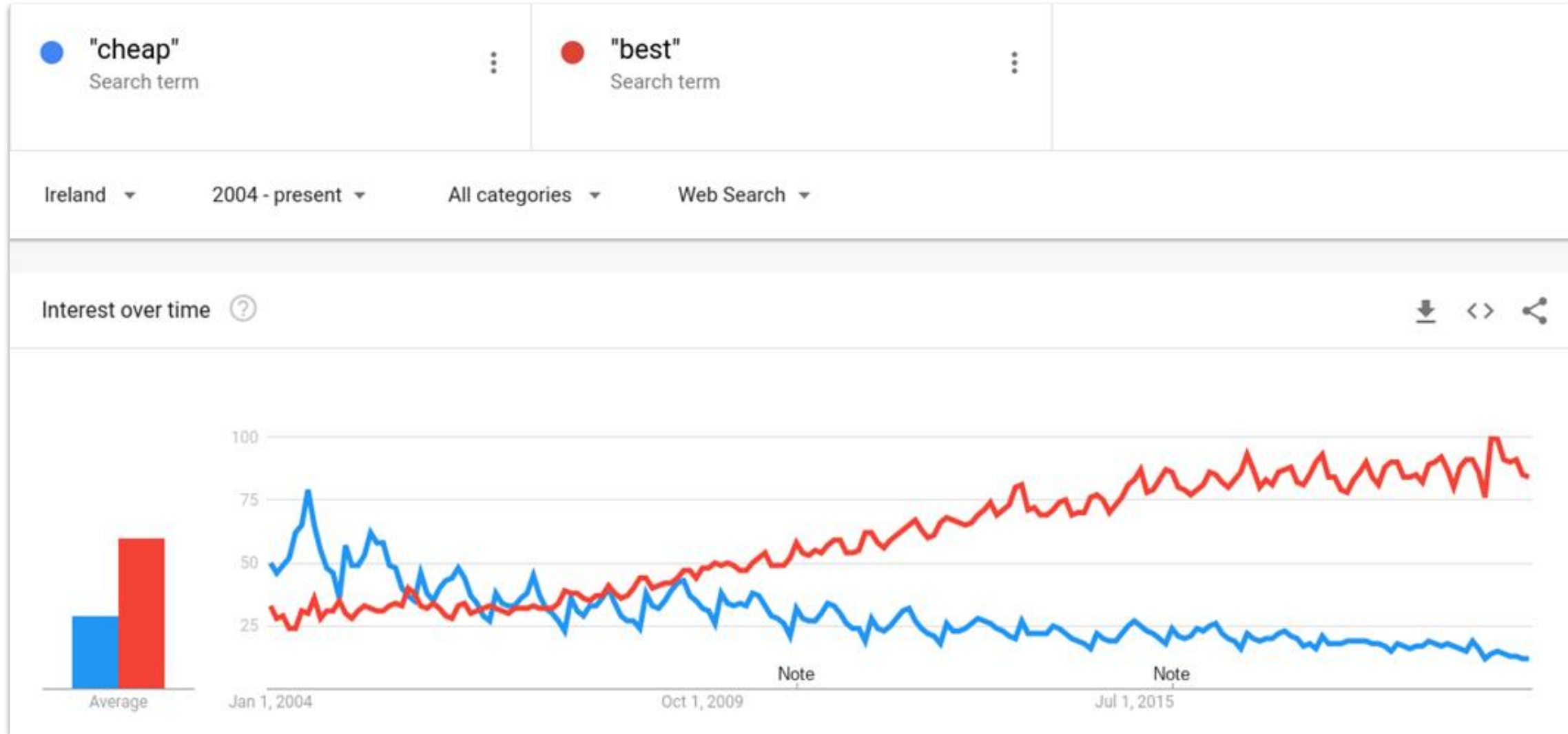
Defining the messy middle



Decoding the messy middle



Cheap, or best?

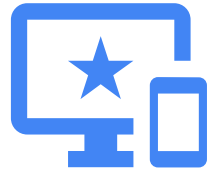


A methodology to address the challenges



Literature review

Extensive review of behavioural science to identify cognitive biases in consumer decision making



Observation of shopping journeys

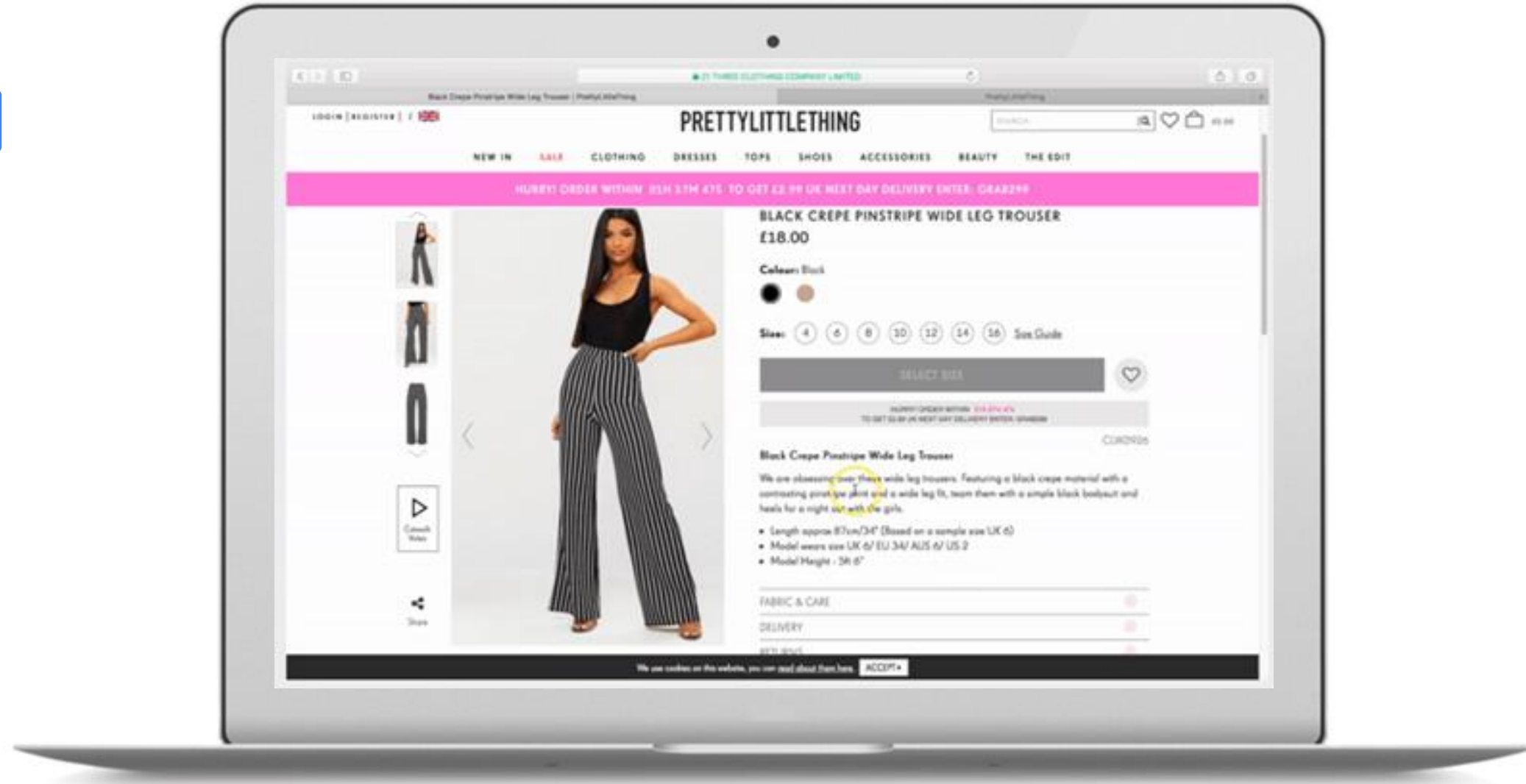
Hundreds of hours of shopping behaviour, analysed through the lense of behavioural science



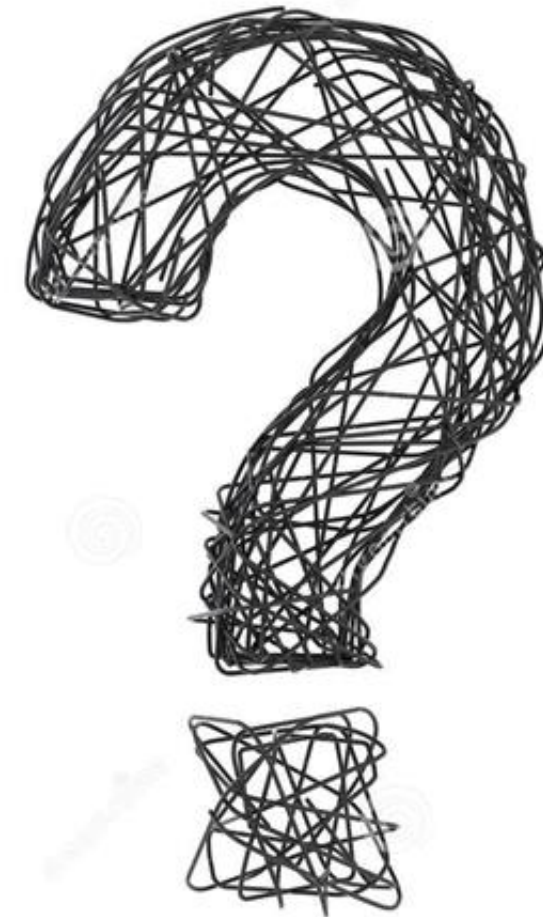
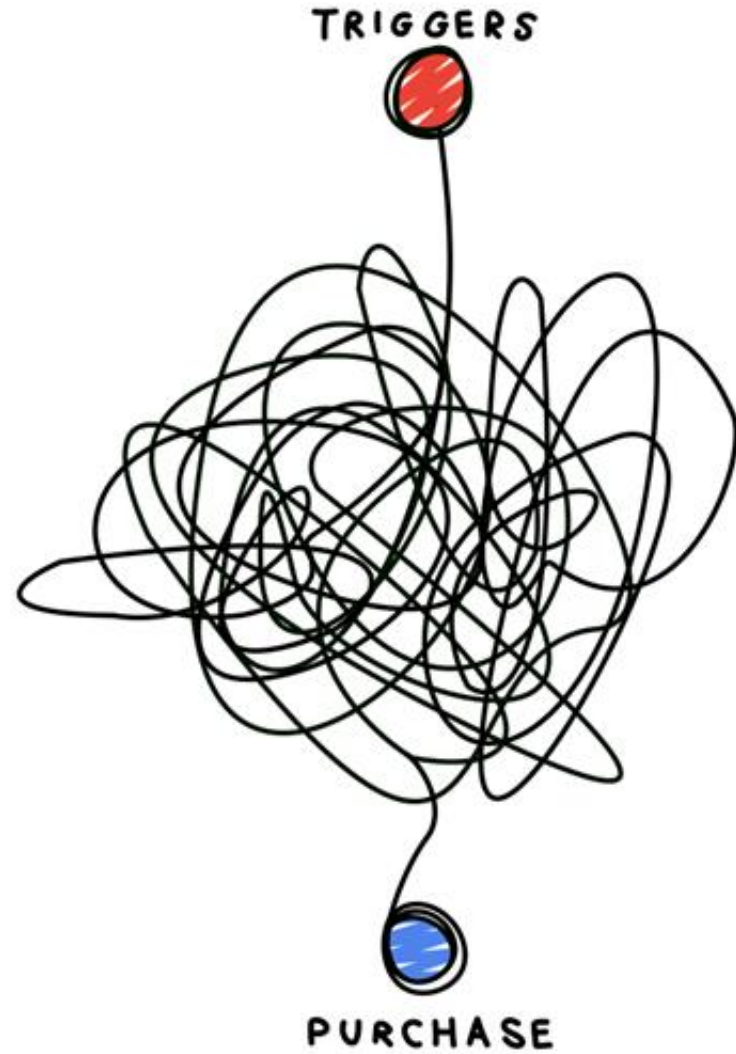
Simulated purchases

Thousands of simulated purchase scenarios to test and validate the role of those biases at scale

Observation of shopping journeys



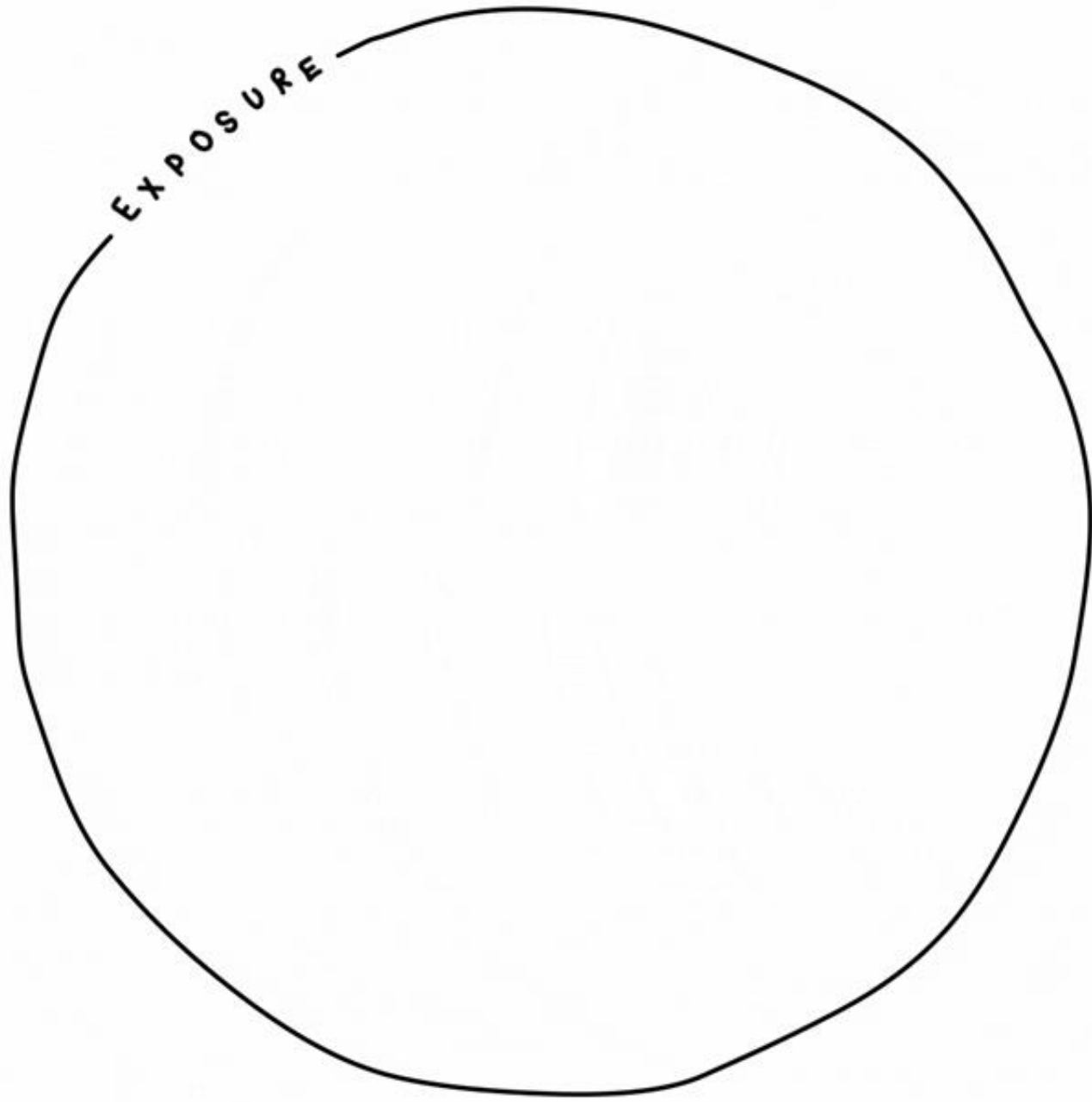
An updated model of purchase decision making

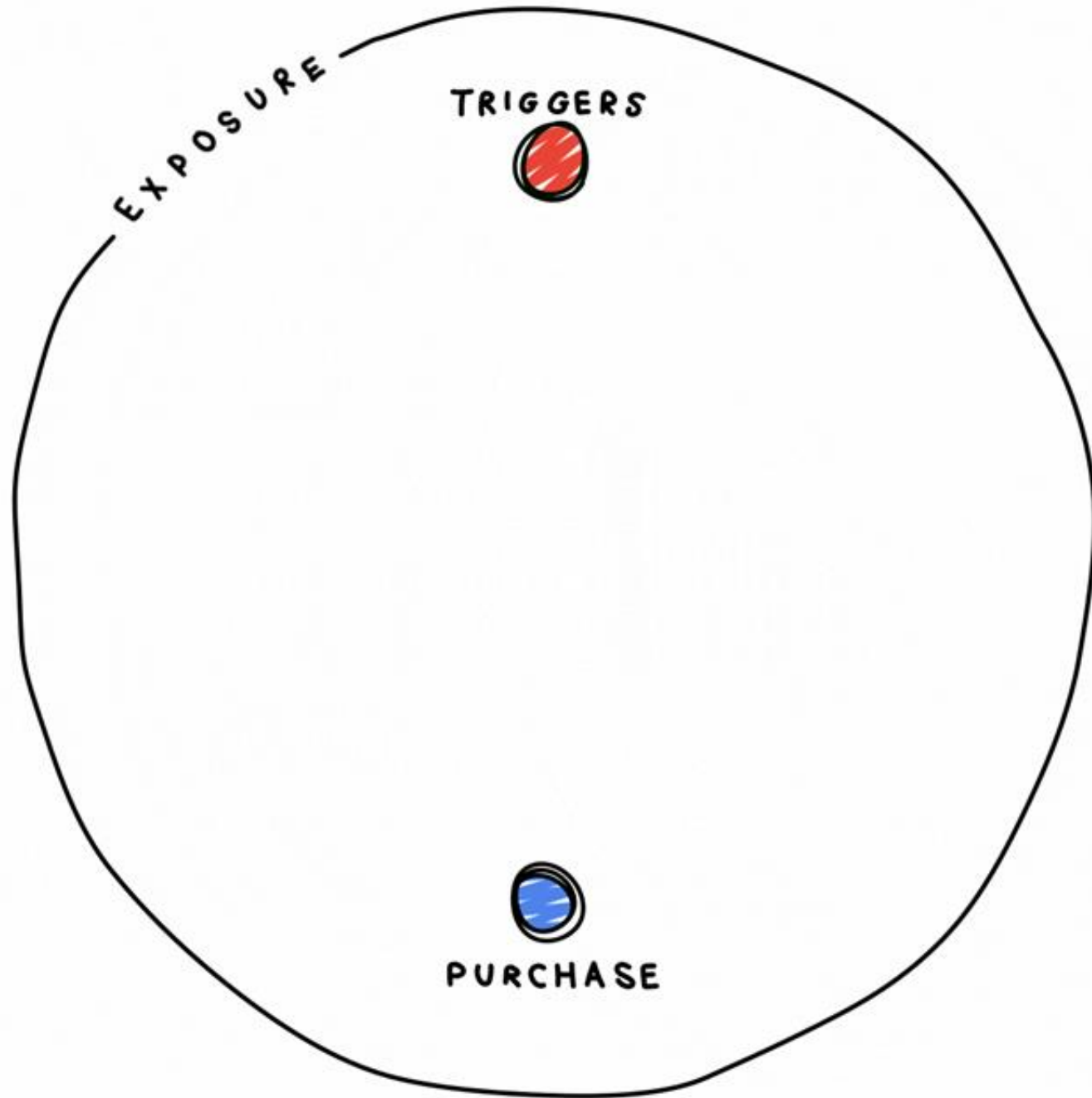


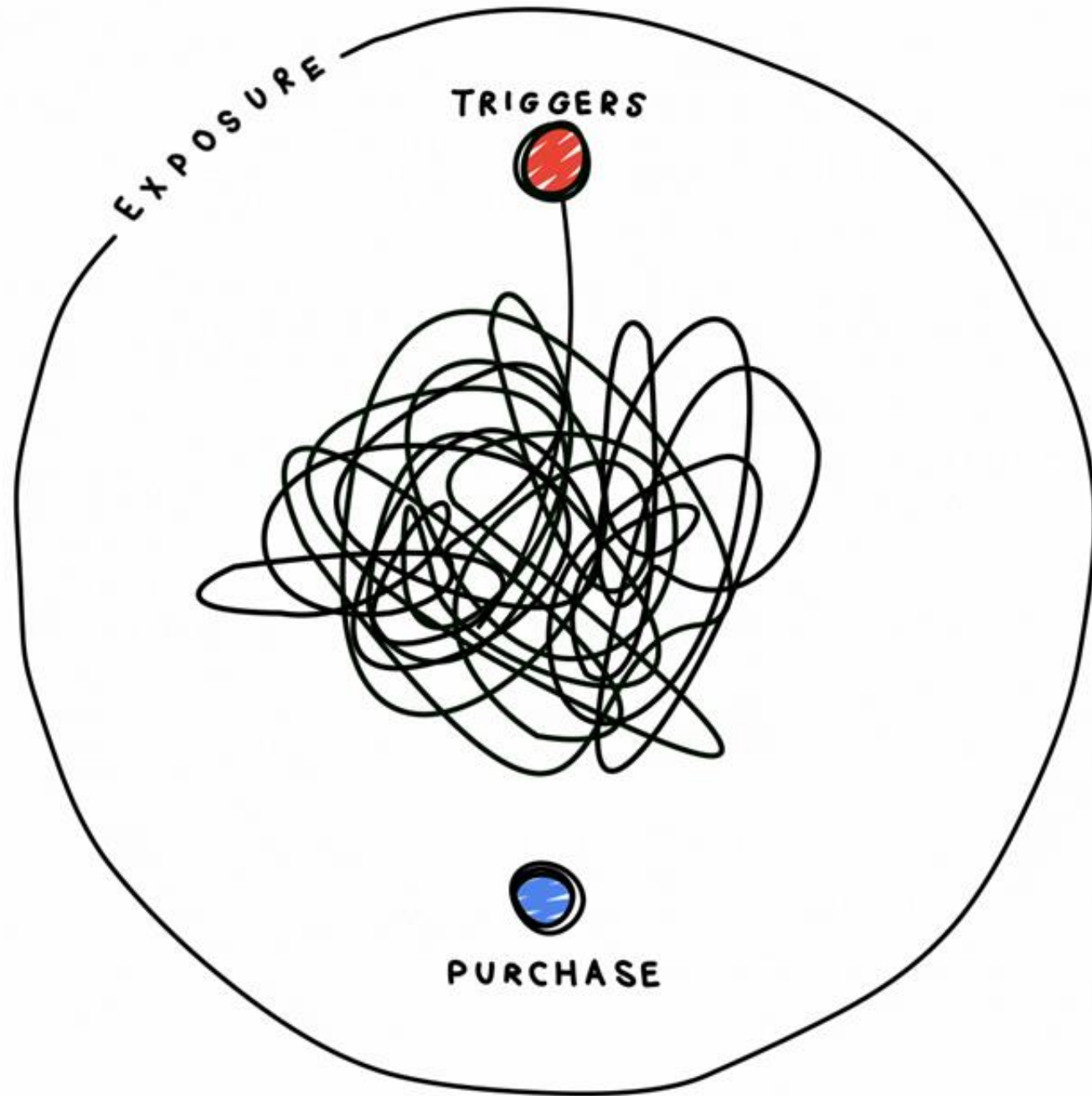
Exposure:

A constantly present
underlying net of
external factors





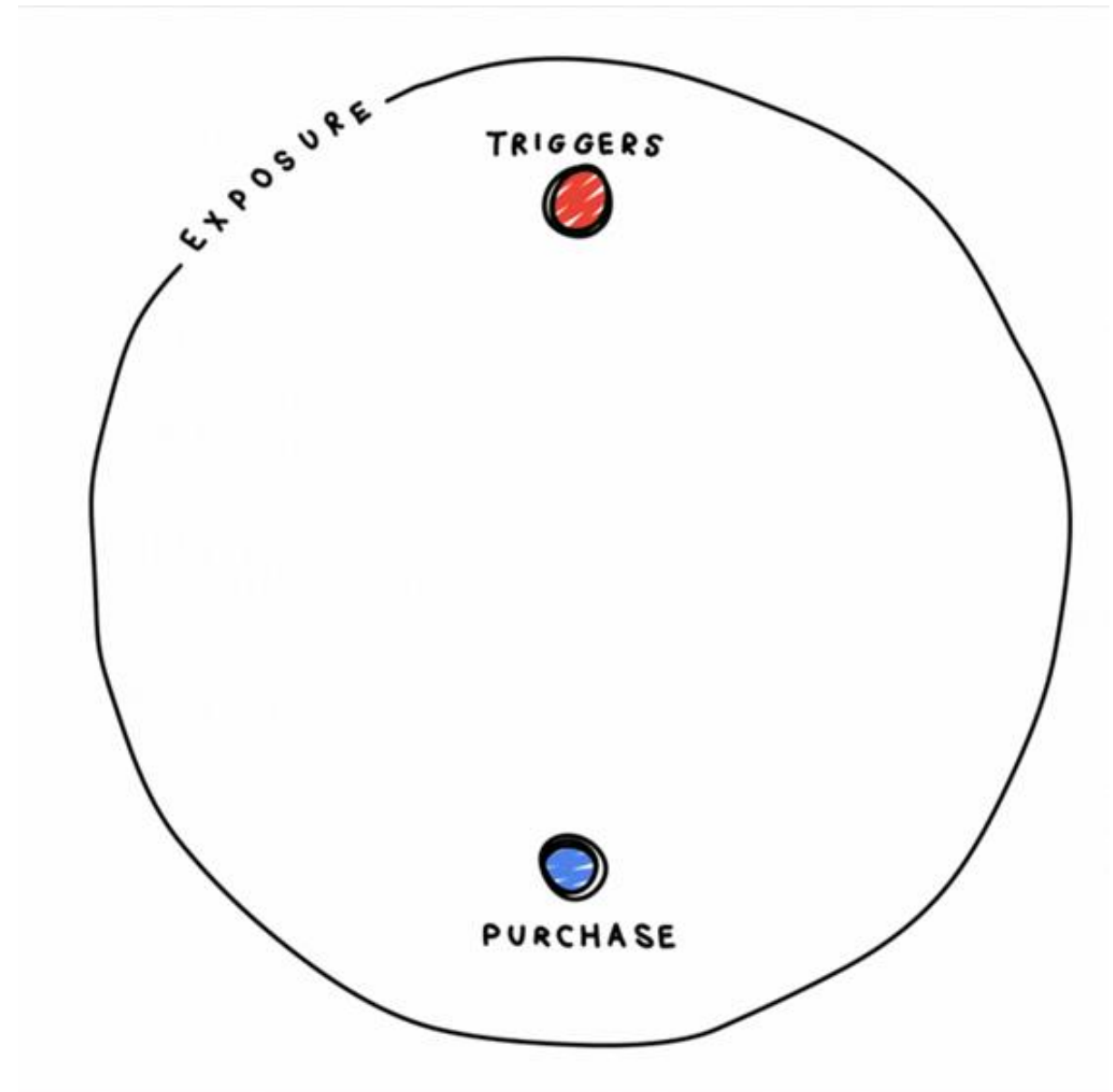




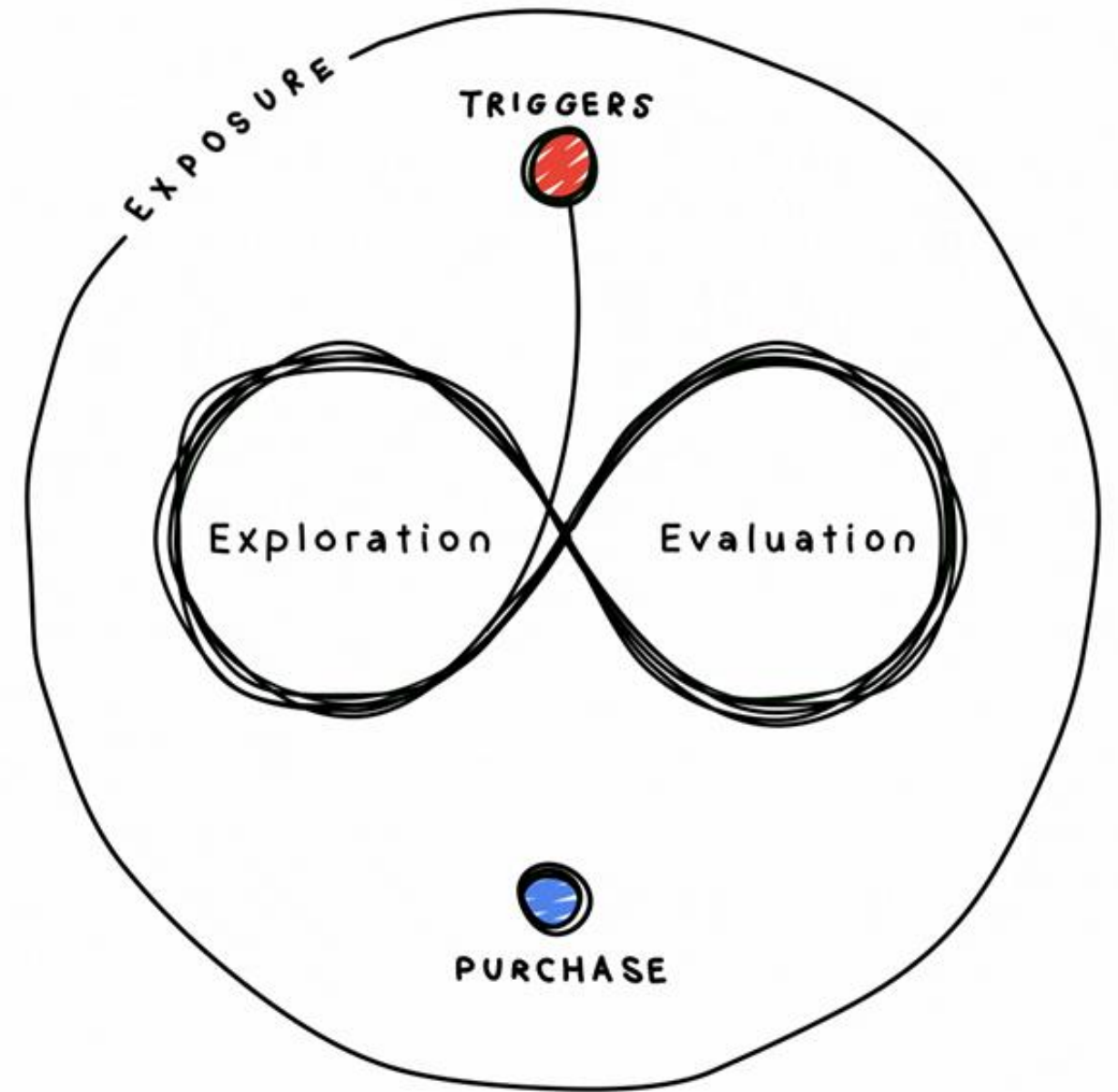
A continuous cycle
of expansion and reduction:

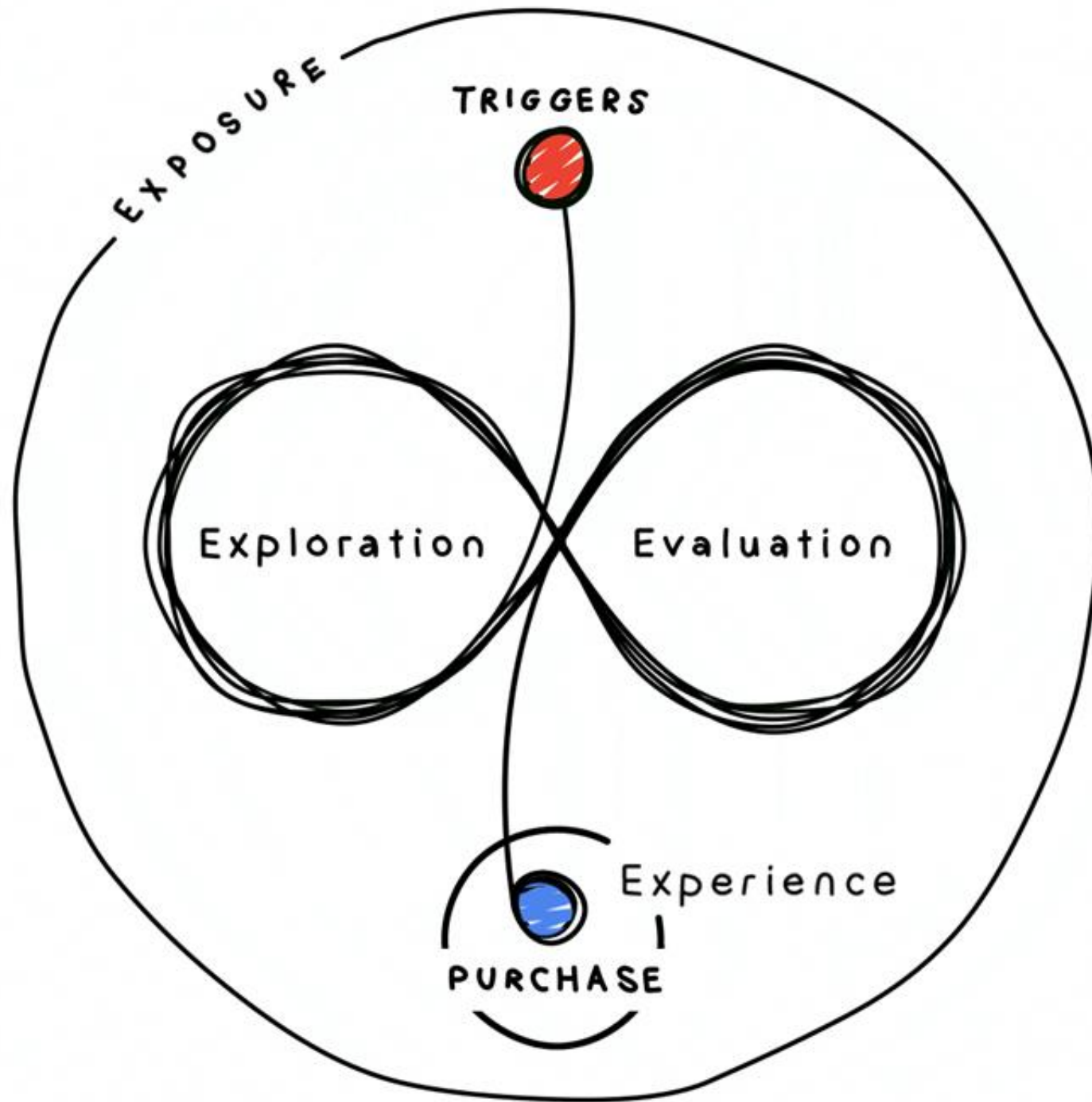
In **Exploration** mode we
expand our consideration set

In **Evaluation** mode we
narrow down our options



The role of **Experience**:
Experience feeds into
Exposure and influences
subsequent journeys





OFF-LIMITS



Brand Strategy



PLAYABLE



Category Heuristics



Authority Bias



Scarcity Bias



Power of Free



Social Norms



Power of Now

OFF-LIMITS



Pricing strategy

Category Heuristics

We rely on **shortcuts** or **rules of thumb** to help us to make **quick & easy** decisions





Social Norms

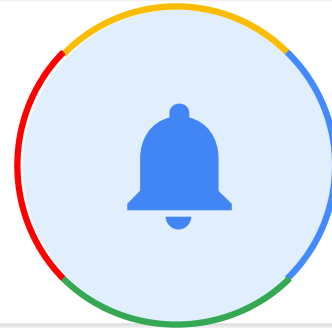
We adopt the opinions and follow the behaviours of the majority



Authority Bias

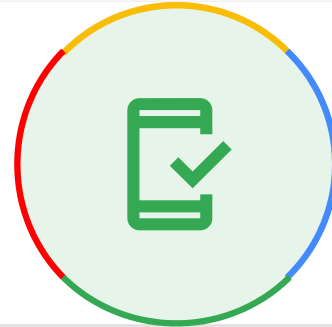
We follow the lead of credible, knowledgeable experts

Power of Now



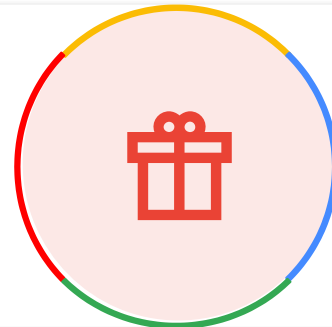
There's no
time like the **present...**

Scarcity Bias



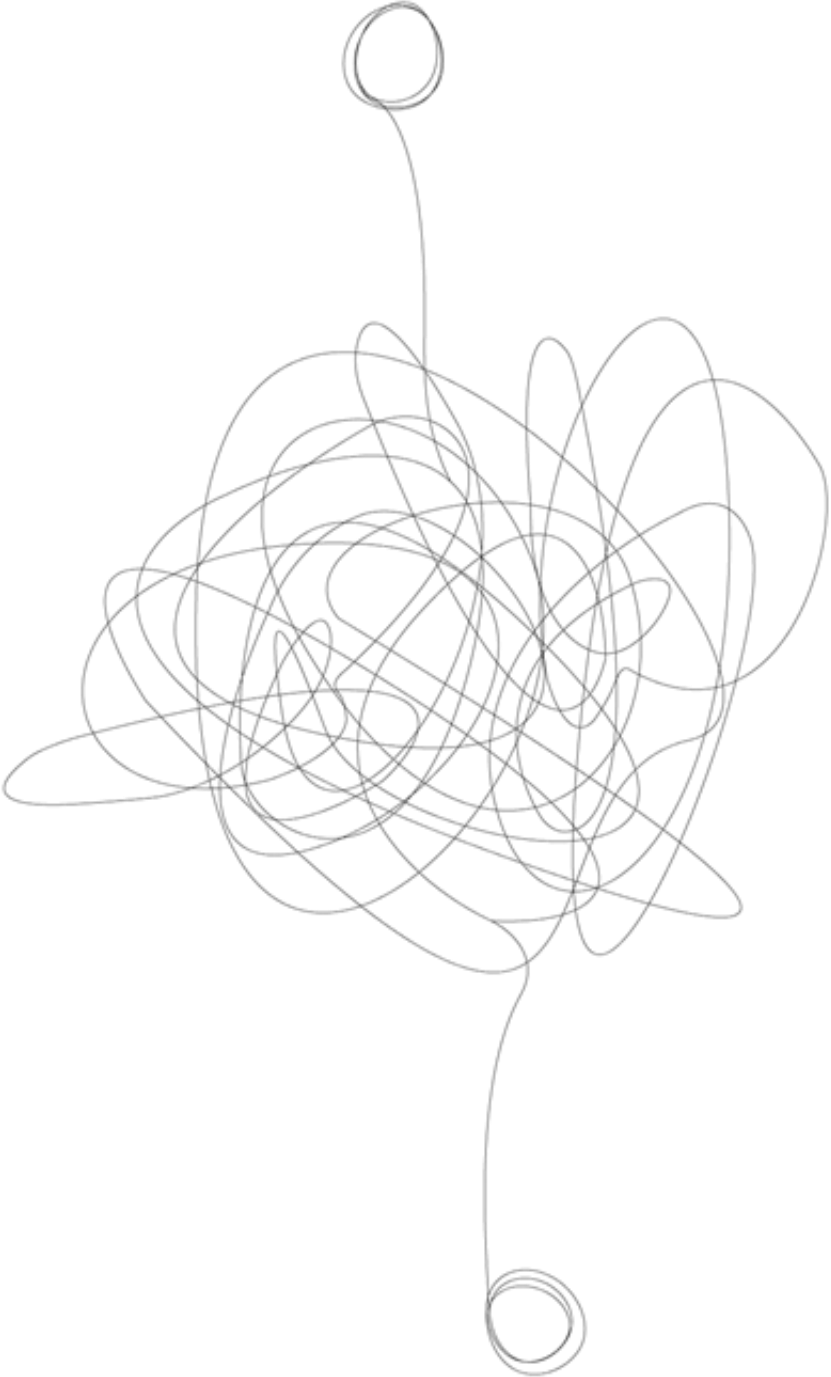
Scarce resources are
more desirable

Power of Free

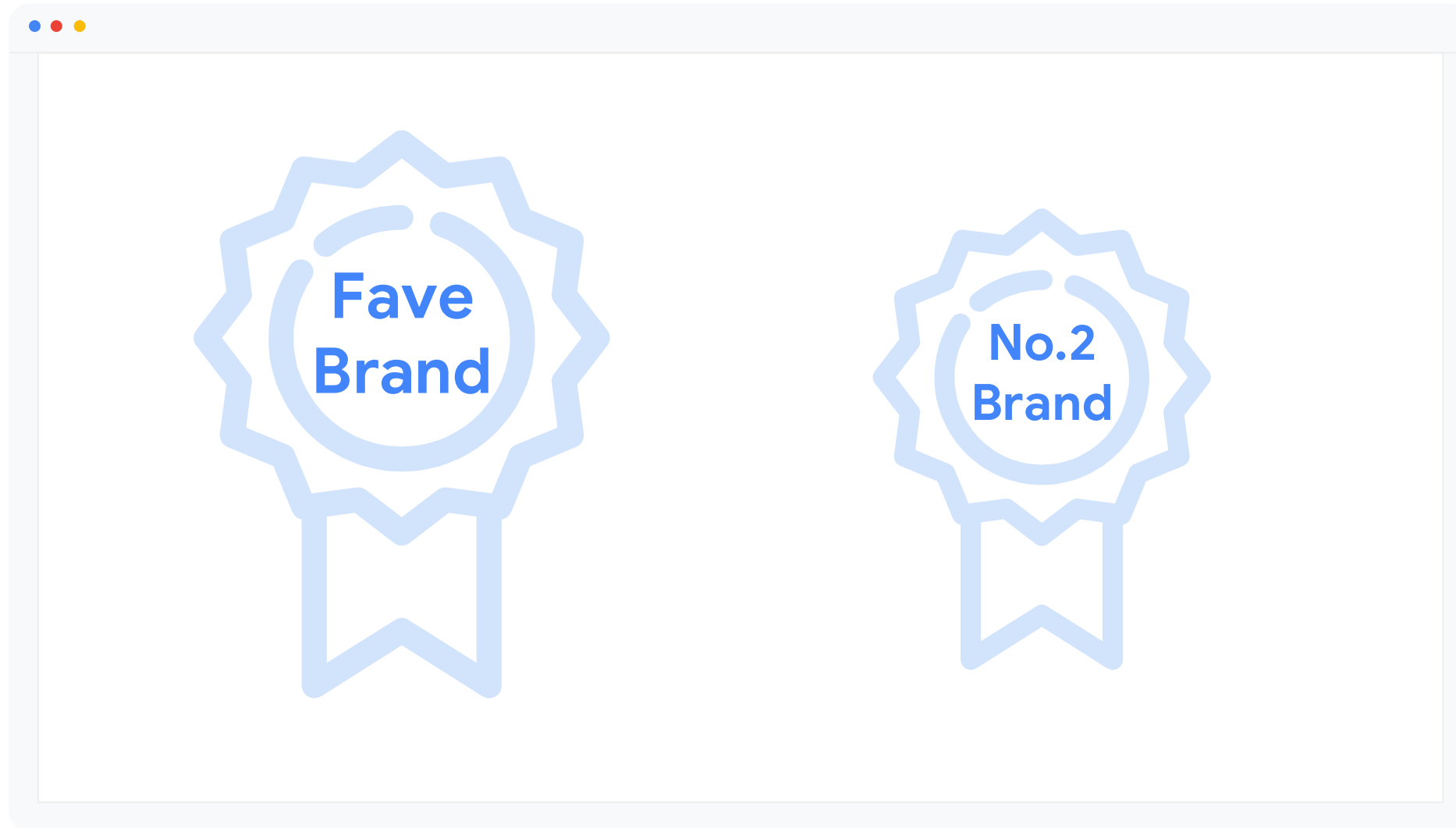


Free things are
immensely attractive

Purchase Simulation



Purchase Simulation



Purchase Simulation

A simulated interface for a purchase simulation. At the top, there are six icons representing different biases: Authority Bias (microphone), Scarcity Bias (diamond), Category Heuristics (gear), Power of Free (gift), Social Norms (sound waves), and Power of Now (bell). Below these icons, the word "CHOOSE" is centered. Underneath "CHOOSE", there are two award-style icons: "Fave Brand" on the left and "No.2 Brand" on the right.

Authority Bias Scarcity Bias Category Heuristics

Power of Free Social Norms Power of Now

CHOOSE

Fave Brand No.2 Brand



Cereal

Choose the option you prefer:

Log in / Register










£0.00

Multi-product search

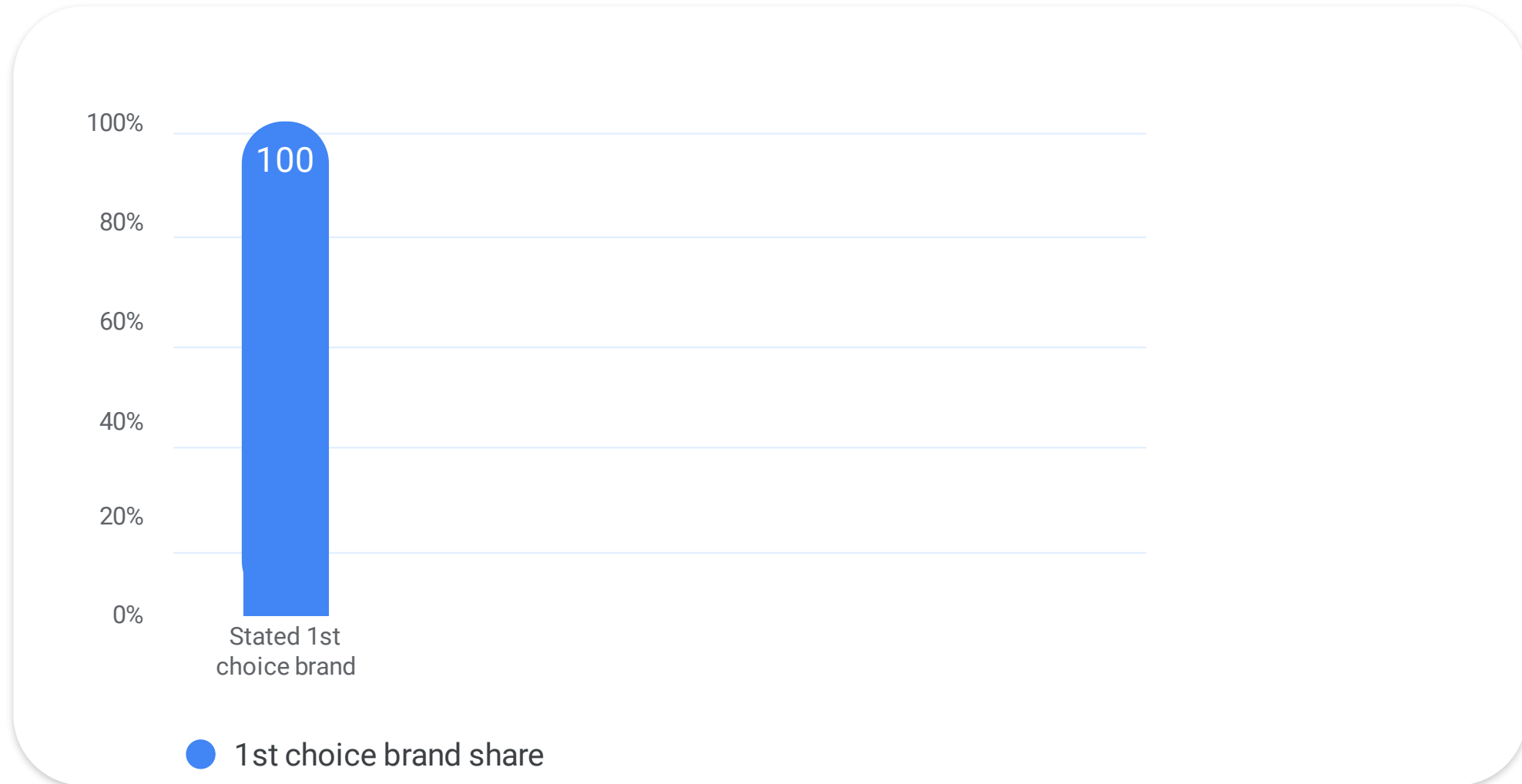
Search products



Groceries ▾ Favourites Offers Discover Recipes Delivery Pass School Shop

			
	 400 reviews	GoodtoKnow <small>RECOMMENDS</small>	 400 reviews
Enter to win a free trip	Fortified with 5 vitamins	20% extra free	High fibre
Deal today only	7 day delivery	Deal this week only	24 hour delivery
			

Cereal - Stated Preference



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 10,000 conjoint purchase simulations. n=1,000 category buyers (1,000 respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

Choose the option you prefer:











Log in / Register

🛒 £0.00

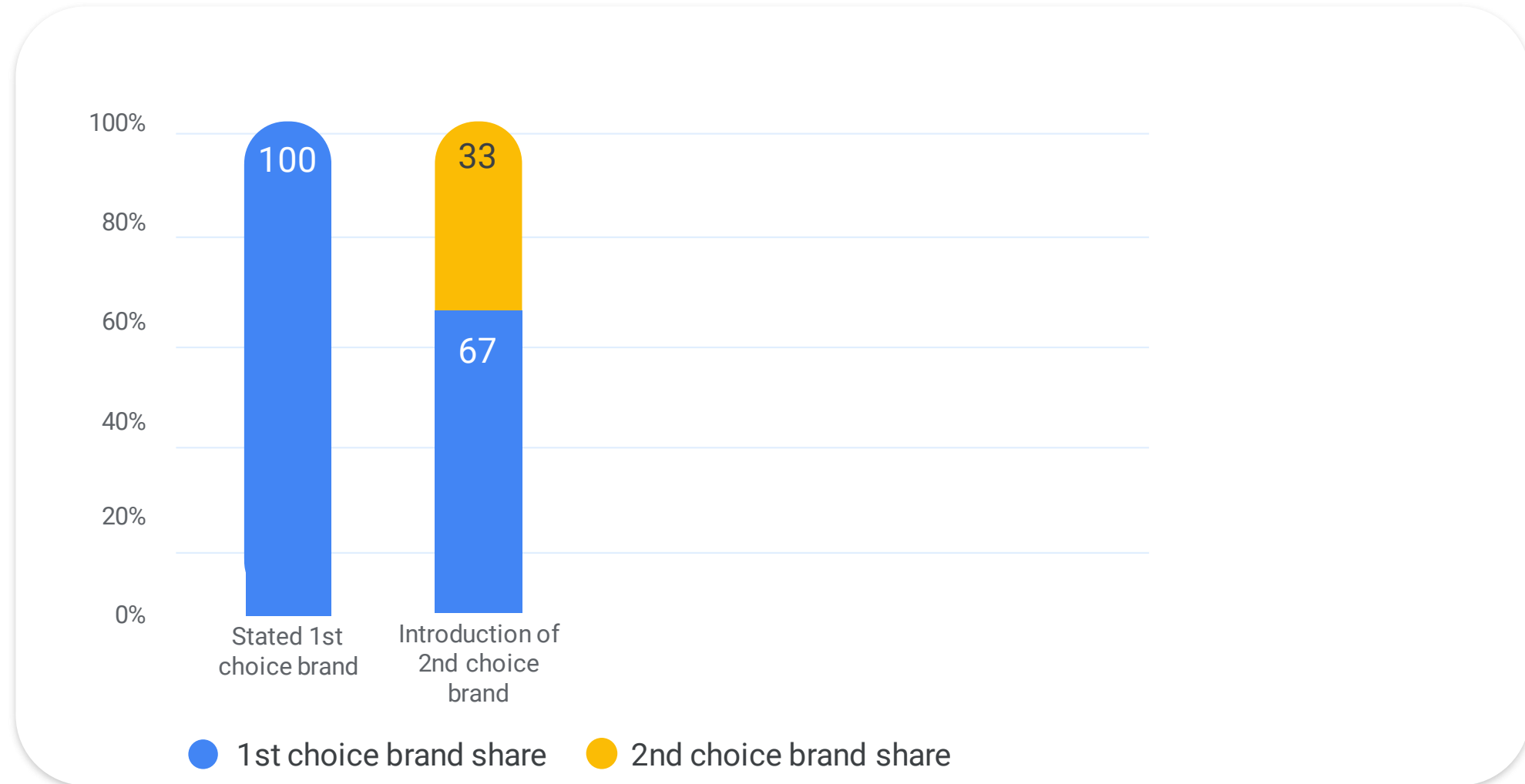
Multi-product search

Groceries ▾ Favourites Offers Discover Recipes Delivery Pass School Shop

Search products 🔍

			
			
Enter to win a free trip	Fortified with 5 vitamins	Enter to win a free trip	Fortified with 5 vitamins
Deal today only	7 day delivery	Deal today only	7 day delivery
			

Cereal - Introduction of 2nd choice brand



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 10,000 conjoint purchase simulations. n=1,000 category buyers (1,000 respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

Authority Bias



1st choice brand

vs



2nd choice brand

Power of Free

Enter to win
a free trip

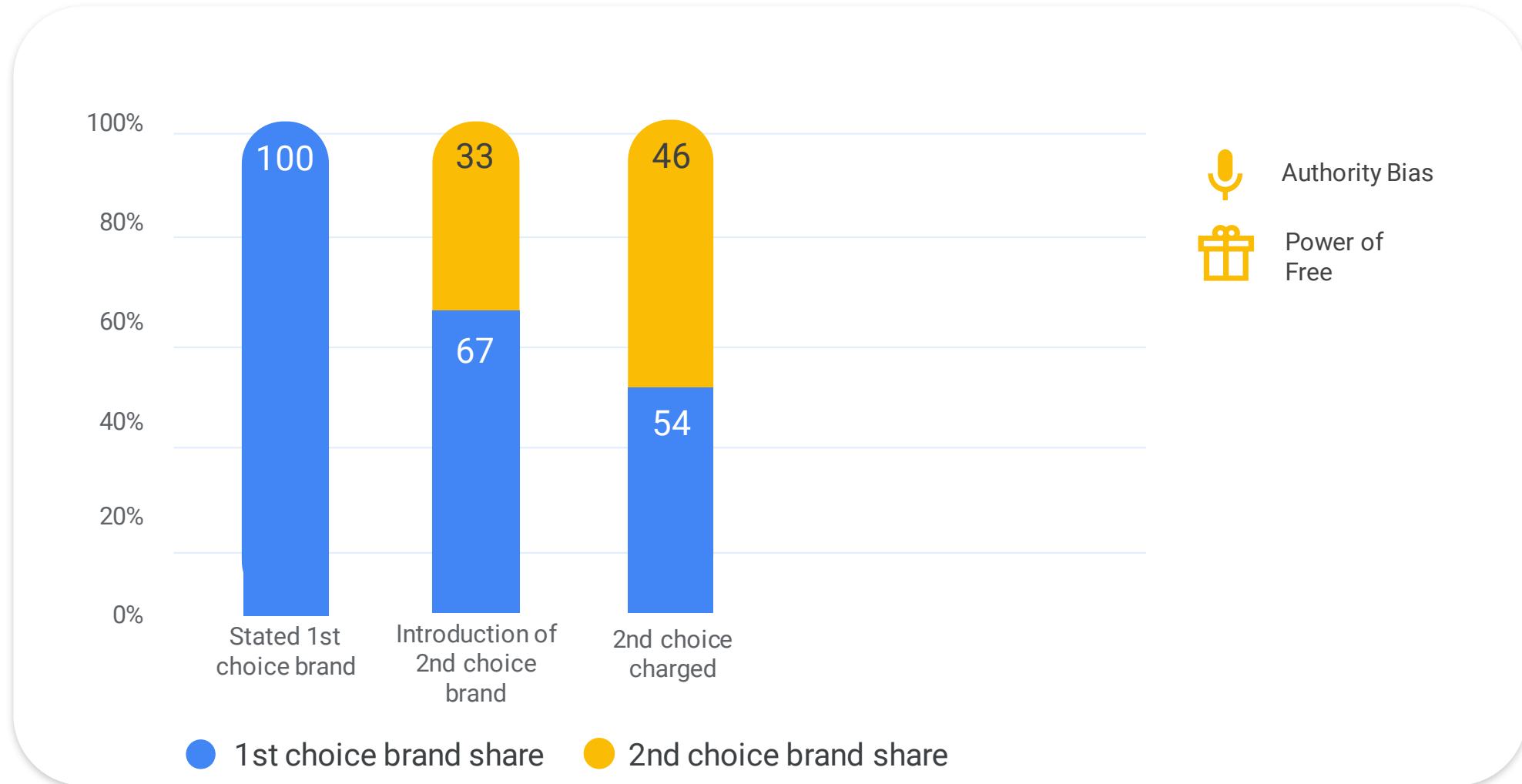
vs

20% extra free

1st choice brand

2nd choice brand

2nd choice brand 'charged'



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 10,000 conjoint purchase simulations. n=1,000 category buyers (1,000 respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

Social Proof



1st choice brand

vs



2nd choice brand

Category Heuristics



Fortified with
5 vitamins

1st choice brand

vs



High fibre

2nd choice brand

Power of Now



7 day delivery

1st choice brand

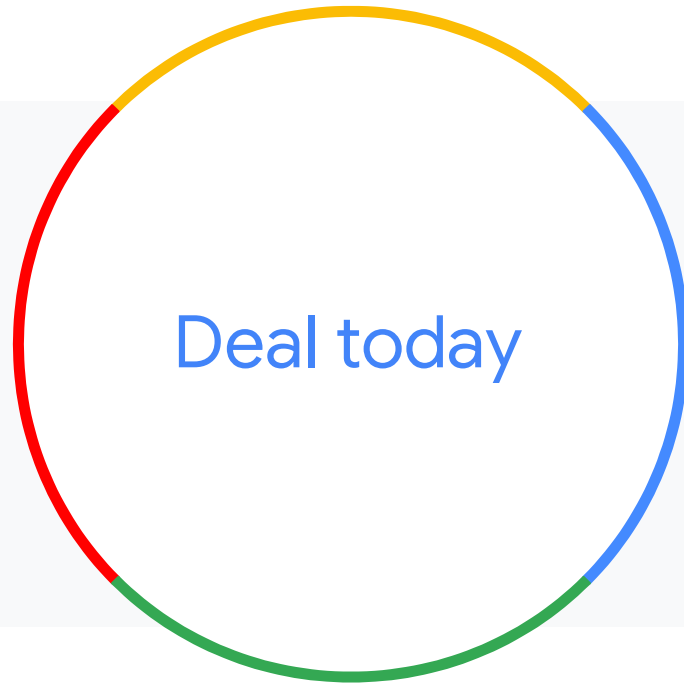
vs



24 hour delivery

2nd choice brand

Scarcity



Deal today

1st choice brand

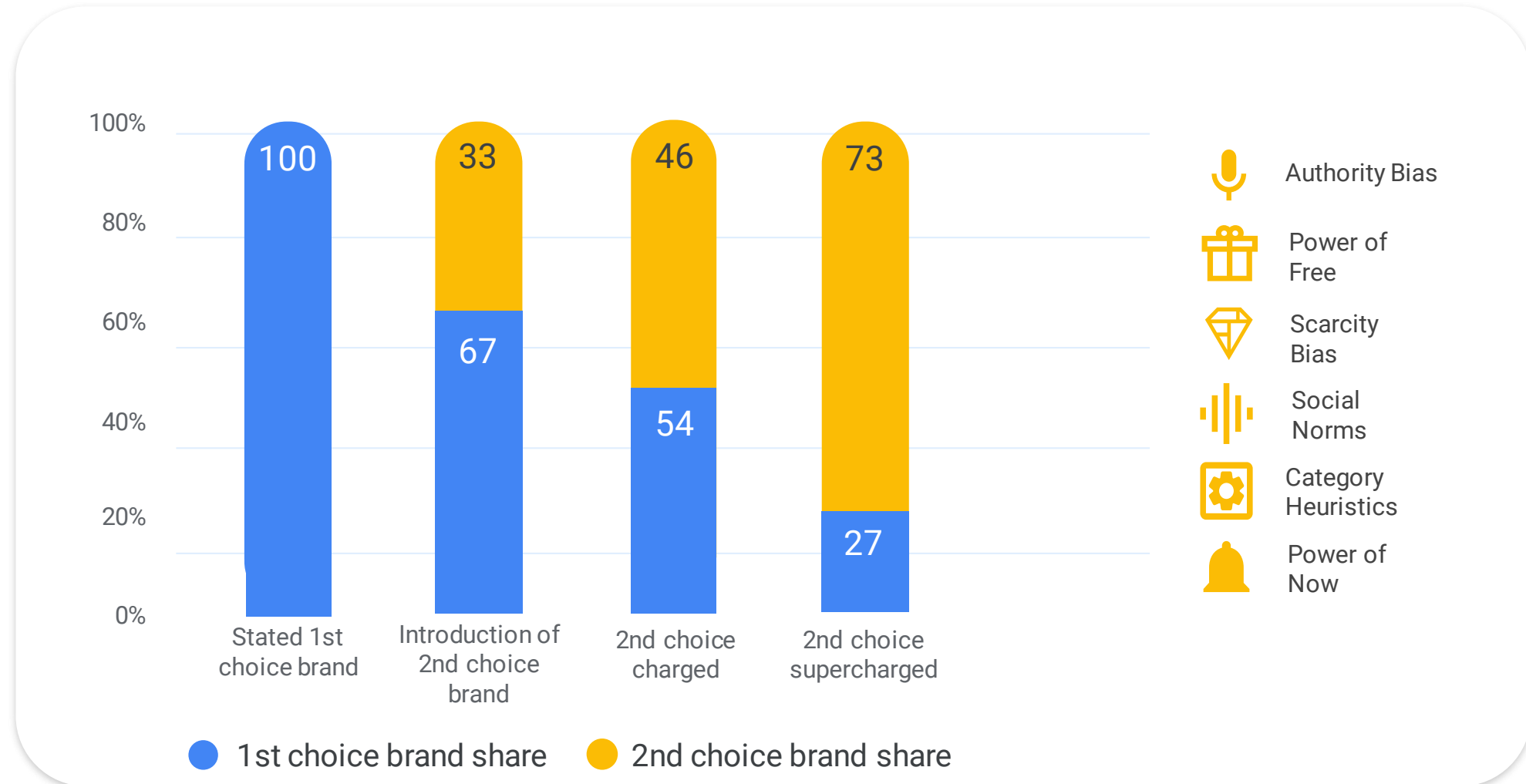
vs



Deal this week

2nd choice brand

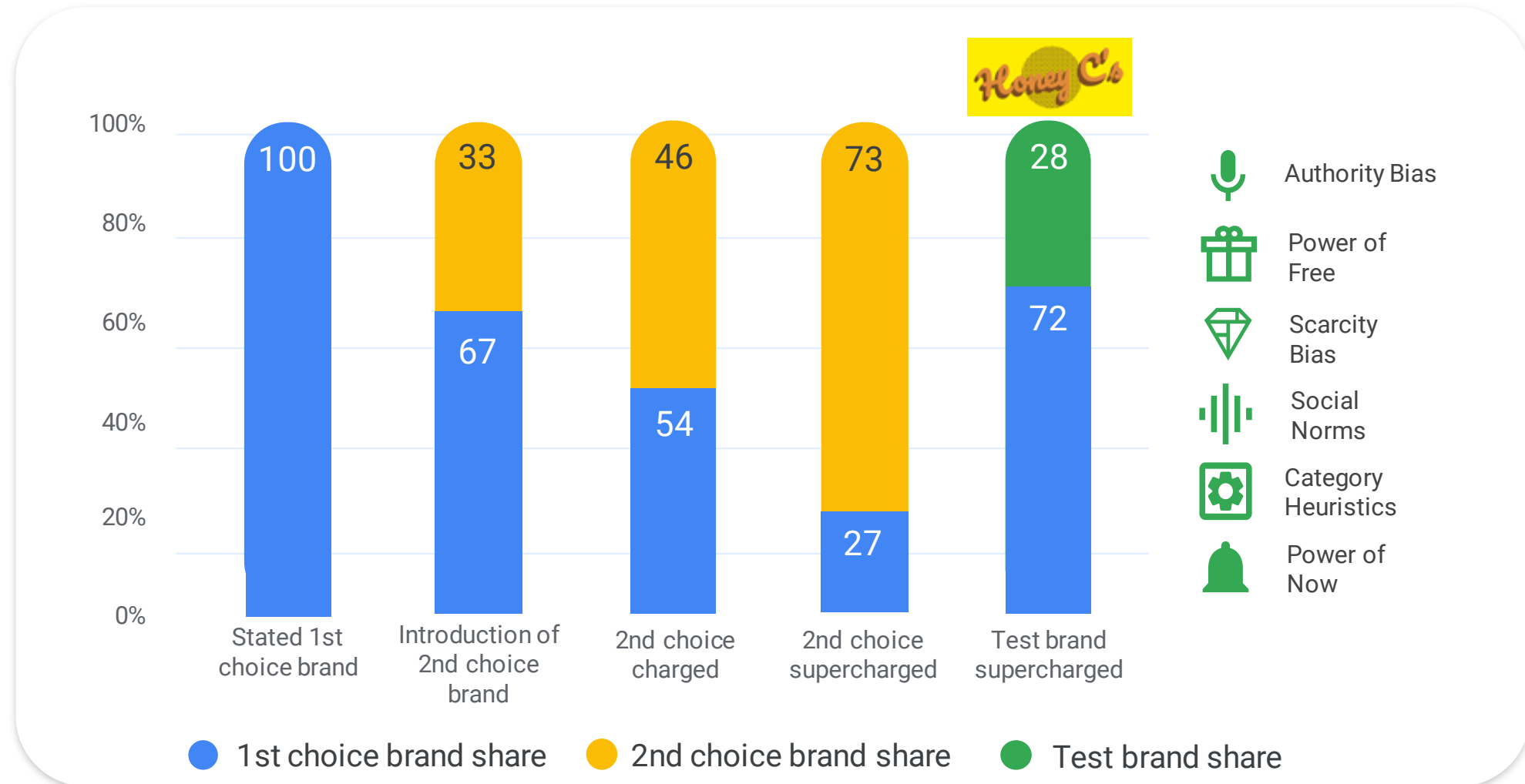
2nd choice brand 'supercharged'



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 10,000 conjoint purchase simulations. n=1,000 category buyers (1,000 respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research



Test brand 'supercharged'



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 10,000 conjoint purchase simulations. n=1,000 category buyers (1,000 respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

Car (SUV)





Brand 1



Brand 2



Free wheel upgrade

Largest boot space

Free car mat

32 miles per gallon

Only 5 remaining!

Drive away with your new car today

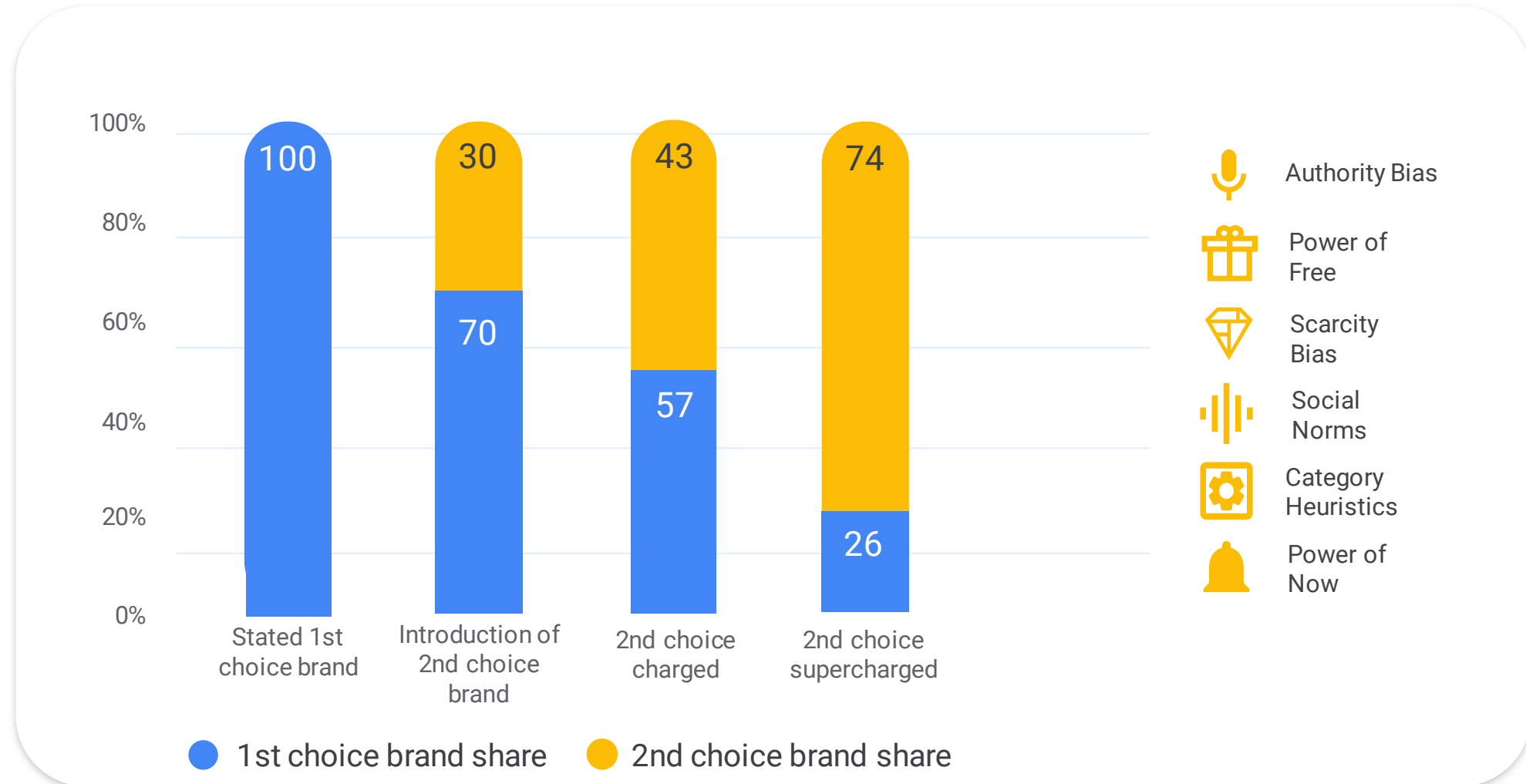
Deal of the month

Ready to drive away in just 7 days

Prefer A

Prefer B

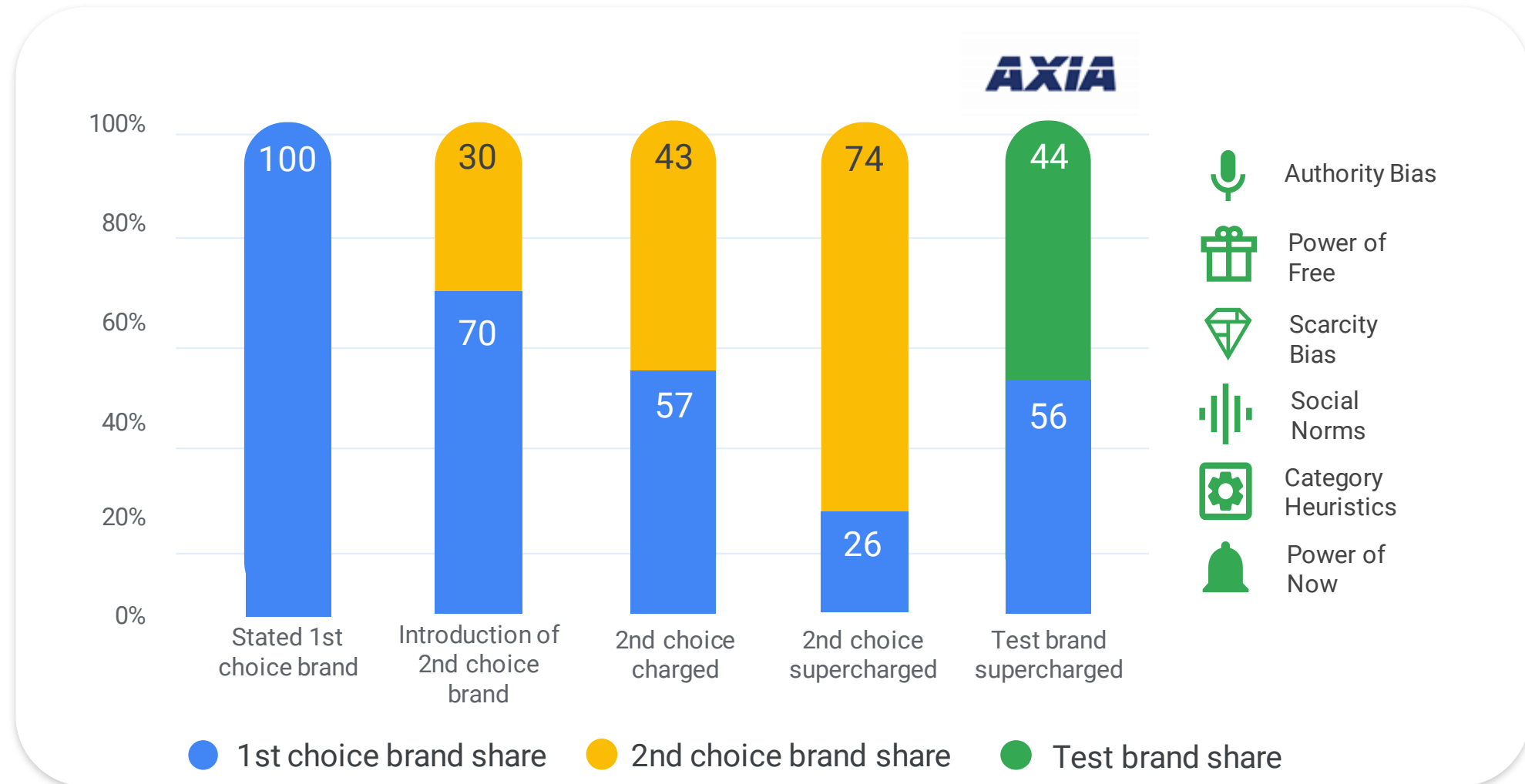
2nd choice brand 'supercharged'



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 10,000 conjoint purchase simulations. n=1,000 category buyers (1,000 respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

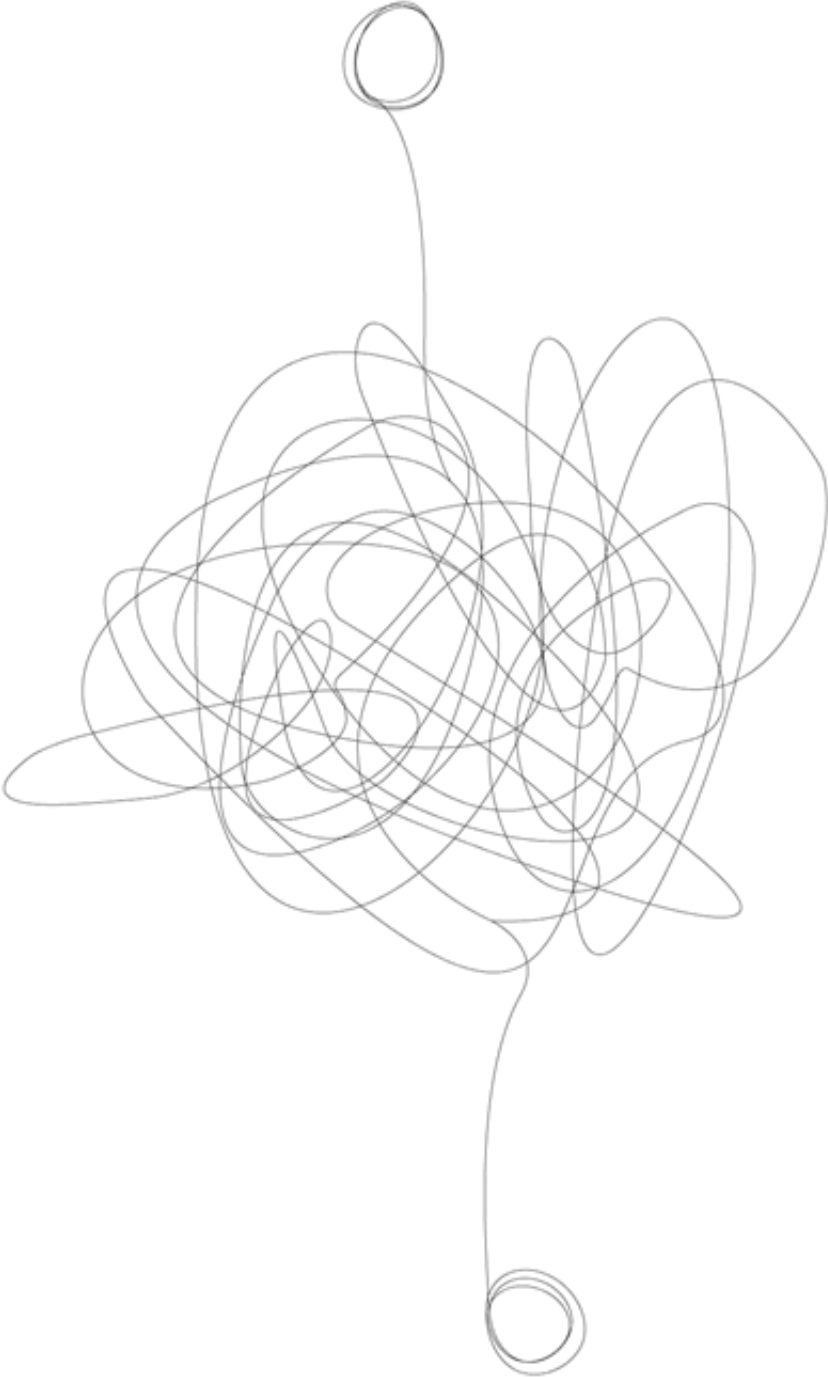
АХИА

Test brand 'supercharged'



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 10,000 conjoint purchase simulations. n=1,000 category buyers (1,000 respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

In summary



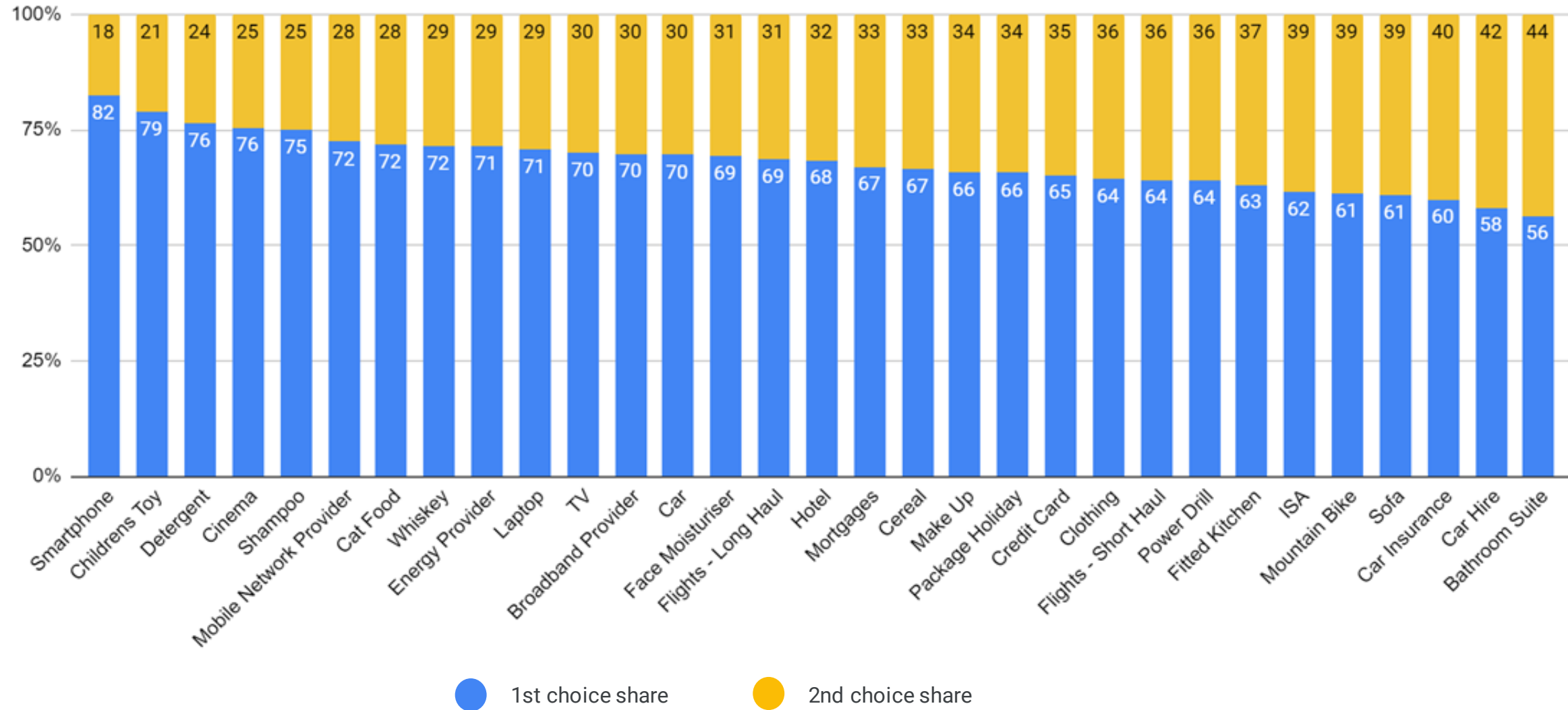


Ensure Brand Presence

Simply showing up can impact customer decision making when they are exploring and evaluating

Introduction of the 2nd choice brand

Share preference after exposure to second choice brand with identical propositions



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 310,000 conjoint purchase simulations. (31 categories x 1,000 category buyer respondents, 10 simulations each). Respondents who never use Google Search or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

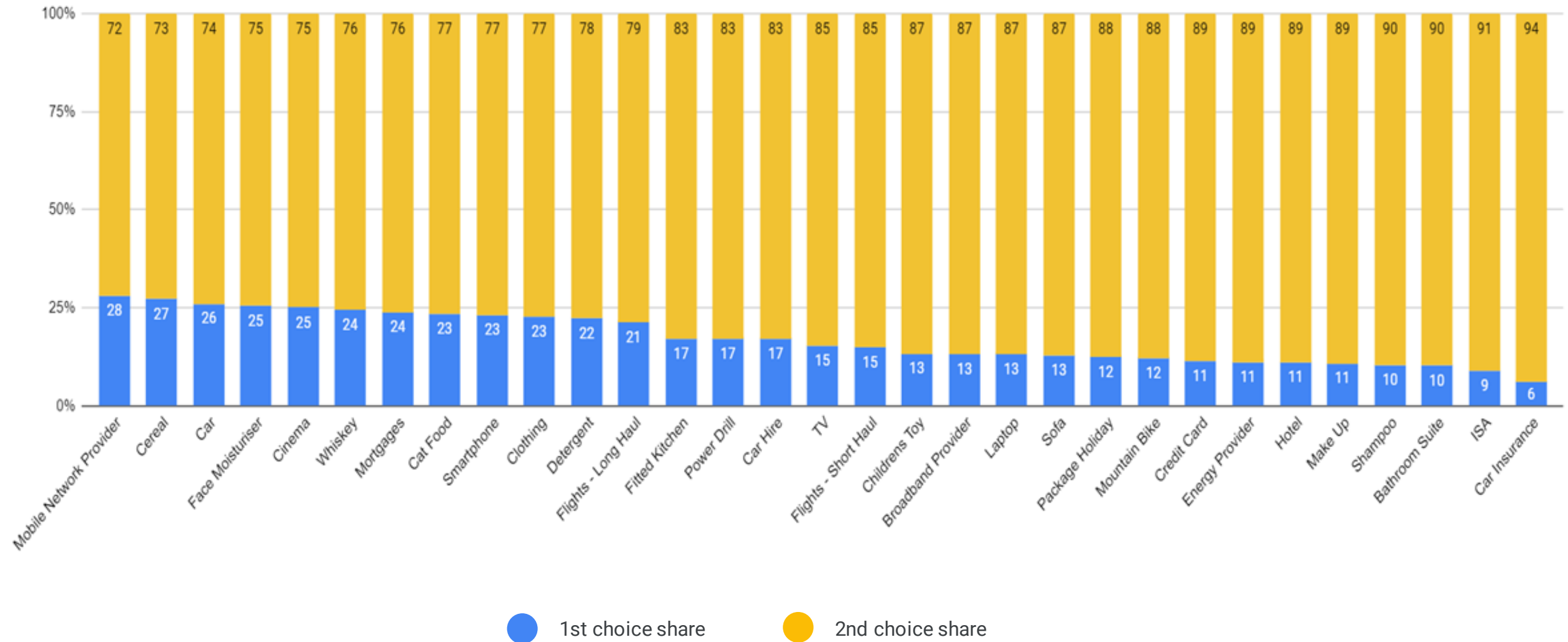


Intelligently (and responsibly) employ
behavioural science principles

Leverage your brands' assets to appeal
to customers in the Messy Middle

2nd choice brand 'supercharged'

Share of preference when second choice brand is supercharged across all 6 biases



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 310,000 conjoint purchase simulations. (31 categories x 1,000 category buyer respondents, 10 simulations each). Respondents who never use GoogleSearch or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research



Close the gap between
trigger and purchase

Help customers navigate the messy middle as
efficiently and effectively as possible

Jetbeyond*

Gem mobile

4sure
CAR INSURANCE



Stay Inn
HOTELS

Maka
SOFT



Paw's Delight

Miller
aaah...

Leaf

Lava

Caliente Getaways



ETHOS

Pure



Opal Air

PVR energy

AXIA

PLUS
building society

TRI

SAGYO
ELECTRONICS

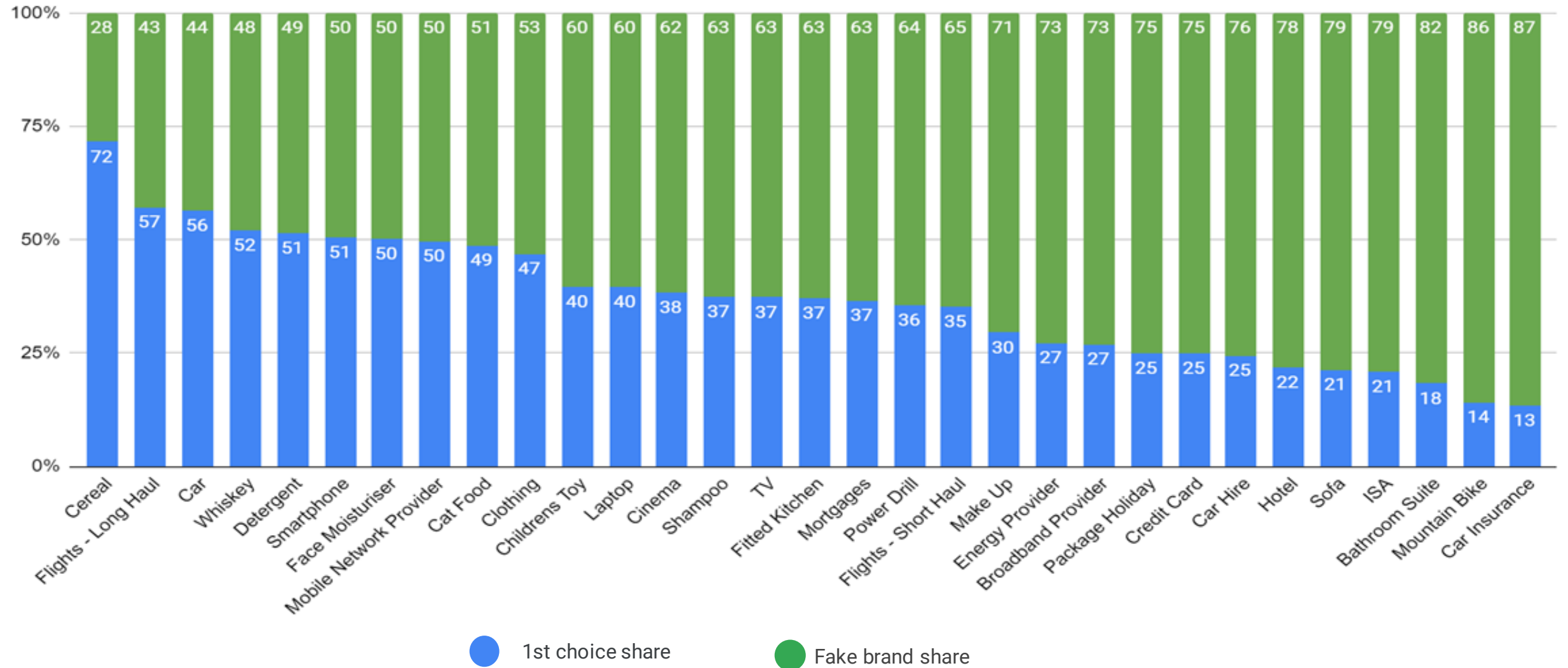
•REVIVE•

PRV
car hire

SEESAW
CINEMAS

Fake brand 'supercharged'

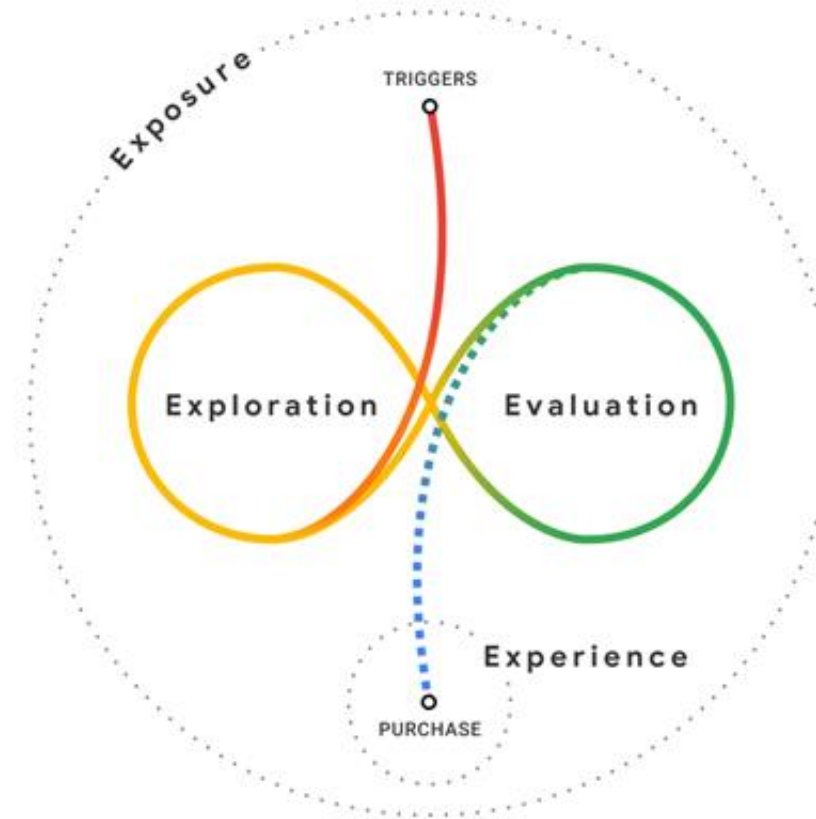
Share of 1st choice brand after supercharging fake brand across all six biases



Source: Google commissioned UK research conducted by The Behavioural Architects. Based on 310,000 conjoint purchase simulations. (31 categories x 1,000 category buyer respondents, 10 simulations each). Respondents who never use GoogleSearch or never use Amazon (2% of category buyers aged 18-65) were screened out before participating in the research

Established Brands

Protect your customer, improve return on brand investment



Challenger Brands

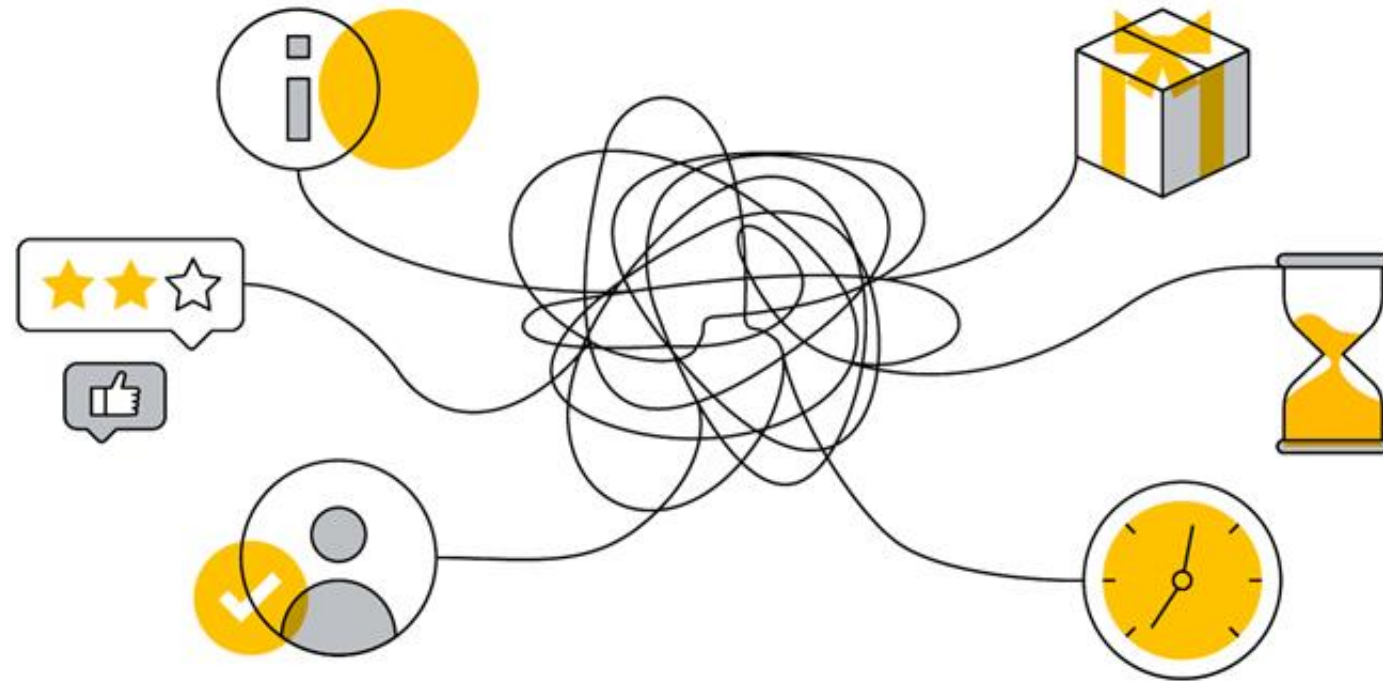
Opportunity to win new customers and build brand

Has the 'messy middle' has become even messier in 2020?

Category Heuristics may be re-prioritised and new ones emerge

Social Proof is dialled up

It's a time for **Authority**

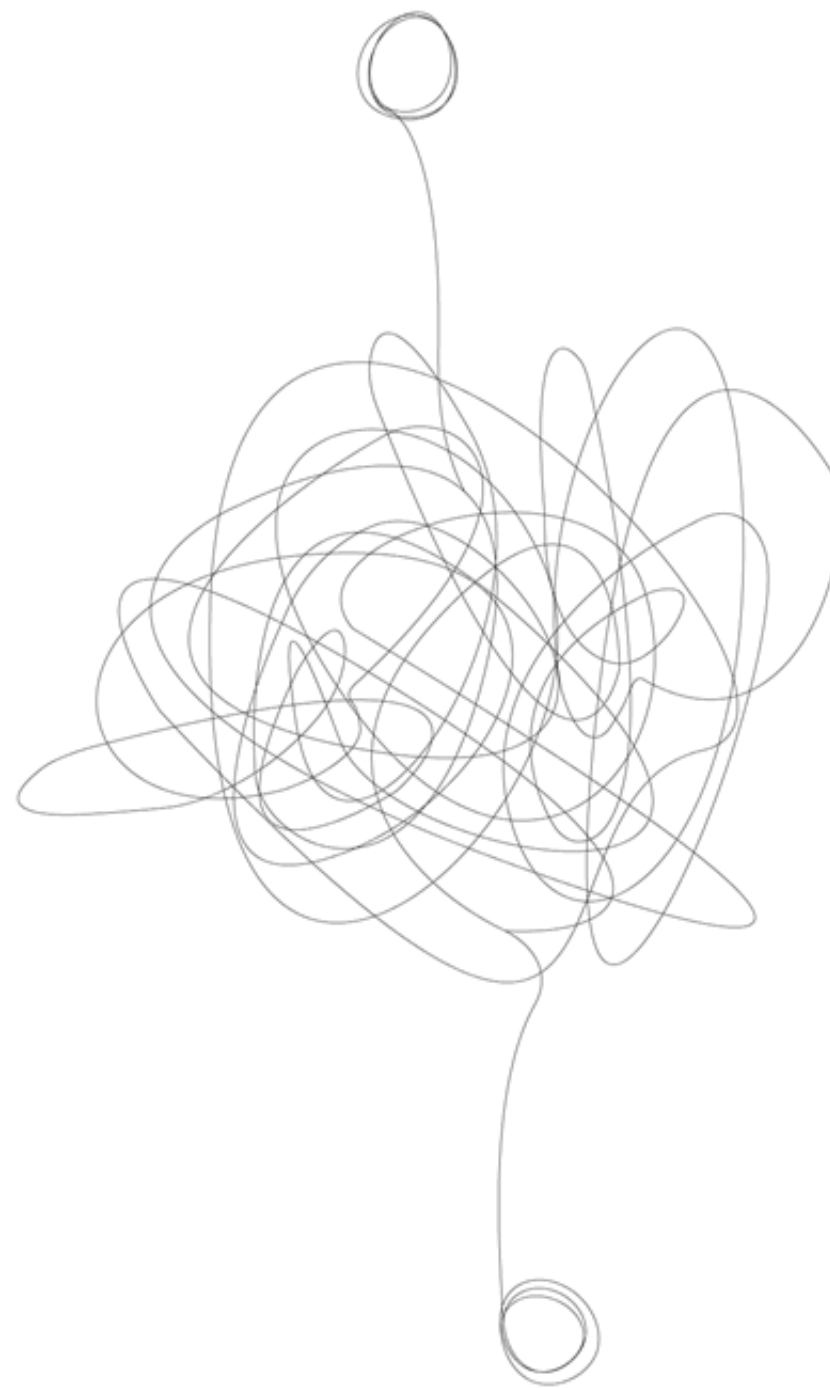


The **Power of Free** in a time of financial strain

Power of Now: there's still no time like the present

Tread carefully with **Scarcity**

Thank you



Appendix: Methodology

12 categories: Car Insurance, Cat Food, Clothing: Jeans, Cosmetics: Mascara, Credit Cards, Domestic Flights, Domestic Hotels, Laptops, Running Shoes, Skincare: Moisturiser, SUV, TV

Qualitative | Screen Recording with Voice-over

10-days of online research missions capturing consumer decision making in real time

- Respondent will complete 2 out of 12 selected categories
- Participants record and narrate their decision making journeys live - both PC and mobile
- Vendor moderates and observes decision making journeys to surface hidden influences affecting behaviour

Sample:

- Participants recruited to be currently in the market for specific products and looking to buy in the close future
- n=50 consumers per market

Quantitative | Conjoint Purchase Simulations

Exploring how 7 different BE executions can influence brand preference

- Each respondent's 1st & 2nd preference brands and a 'fake' brand in each category
- Consumers answer conjoint simulation for 2 categories
- Survey fielded on mobile and PC (46:54)

Sample:

- n = 1,000 consumers per category
- Participants recruited to be currently in the market for specific products and looking to buy in the close future
- National representative sample within Google search addressable audience
- Based on key demographics & regions/cities