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**WINNING THE ZERO MOMENT OF TRUTH IN ASIA**

Women, consumer packaged goods and the digital marketplace



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Women, consumer packaged goods and the digital marketplace

By Jim Lecinski and Joanna Flint

Google

# TABLE OF CONTENTS

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5 INTRODUCTION <b>JIM LECINSKI</b>	7 CHAPTER 1 <b>CHANGING THE RULES</b>	13 CHAPTER 2 <b>THE NEW MENTAL MODEL</b>
25 CHAPTER 3 <b>ZMOT ALL AROUND US</b>	35 CHAPTER 4 <b>RATINGS AND REVIEWS: WORD OF MOT</b>	43 CHAPTER 5 <b>EQUAL THOUGHT, NOT AFTERTHOUGHT</b>
53 CHAPTER 6 <b>HOW TO WIN AT ZMOT</b>	65 CHAPTER 7 <b>WHAT'S NEXT FOR ASIA?</b>	73 <b>KEEP IT GOING</b>
75 <b>APPENDIX</b>	94 <b>END NOTES</b>	96 <b>ACKNOWLEDGEMENTS</b>



# INTRODUCTION

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JIM LECINSKI

CHIEF ZMOT EVANGELIST

It's been two years since we published the original *Winning the Zero Moment of Truth* ebook, and I've been so gratified by the response it has received.

Marketers from the US to the UK, Poland to Australia and Colombia to Turkey have embraced ZMOT as the new marketing imperative. They're applying ZMOT to a wide range of industries like automobiles, real estate, education and even maritime components and systems. (Really! Try Googling "ZMOT maritime.")

And the thinking around ZMOT continues to evolve. That's why it's my pleasure to welcome you to this brand new ZMOT edition focused especially on Asia, female shoppers and the consumer packaged goods industry.

When my fellow Googler Joanna Flint came to me with the idea for this new edition, it quickly became clear to me that this was a project Google needed to do because Asia is a microcosm of so many trends happening today at the Zero Moment of Truth: the explosion of mobile; the rise of developing regions and markets; the importance of reviews and social sharing; and of course, the shift of information and power to the consumer, continuing the ongoing reversal of Akerlof's famous information asymmetry.

This new edition includes much of the content from our original ZMOT book, plus new interviews, ideas and recommendations from marketing experts in the Asia and CPG spaces. Joanna has added her own stories and experiences as Google Asia's CPG thought leader. She's been in Singapore for 10 years and has a strong perspective on the region's marketing trends and interests. You'll enjoy her voice throughout this edition.

There's more. We asked 8,000 female shoppers what influenced their shopping journeys, and we present the results in detail here for the first time. I know you'll find the data useful — and in some cases quite surprising.

When we published the original *Winning the Zero Moment of Truth*, we felt like we were riding the crest of a pretty big new marketing wave. Two years later the ZMOT wave is still growing around the world and gaining incredible power day by day. Marketers who surf that wave have gained a competitive advantage over those who choose to ignore it.

But as Joanna's colleague Ian McKee says here, *it's not too late to be early* — the real revolution is still ahead of us! This little guidebook will help you get out in front.



# CHAPTER

# 1

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## CHANGING THE RULES

*“When consumers hear about a product today, their first reaction is ‘Let me search online for it.’ And so they go on a journey of discovery: about a product, a service, an issue, an opportunity. Today you are not behind your competition. You are not behind the technology. You are behind your consumer.”*

— Rishad Tobaccowala

Chief Strategy & Innovation Officer  
VivaKi

### **Let me tell you a shopping story.**

A few months ago I was visiting Tokyo for a conference, and on my way back from a meeting I shared a taxi with an Asian colleague who had simply gorgeous porcelain skin.

I couldn't resist asking her what skincare products she used. She smiled and mentioned SK-II. I didn't want to pry, but what I was dying to know was, “Does it work for Caucasian skin?” and “How much does it cost?”

As soon as I got out of the taxi, I grabbed my smart phone and started searching for SK-II. I found

ratings and reviews, the brand's official site, even videos posted by customers. Then I found an article on Cate Blanchett, the Australian actress from the Lord of the Rings movies, saying she's been using SK-II loyally for 10 years — so loyally that she now endorses it. Well, if you've seen her skin, you know I was sold.

Now I needed to check prices. Another search and I'd found the prices at online stores and in Singapore, where I live. It was expensive, and I wasn't quite ready to buy. But then, on my plane flight home, I spotted it in the duty-free listing. And the rest, as they say, is history.

Why am I telling you this?

Because the moment when I pulled out my smart phone is the moment that's changing the rules of marketing today. It's the new decision-making moment that takes place a hundred million times a day on smart phones, laptops, desktops, tablets and wired devices of all kinds. It's a moment where marketing happens, where information happens, and where consumers make choices that affect the success and failure of nearly every brand in the world.

At Google, we call this the Zero Moment of Truth, or simply ZMOT ("ZEE-mot").<sup>1</sup>

## *A Zero Moment of Truth is:*

**A MOTHER-TO-BE ON A BUS**, researching which decongestant is safe for her to use before her stop at the pharmacy.

**A DOMESTIC HELPER IN THE KITCHEN**, looking up how to remove soy stains from a white T-shirt.

**A BUSINESSWOMAN AT LUNCH**, scanning ratings and reviews to decide which night cream to buy.

**A NEW DAD ON THE COUCH**, searching for the best nappies for nighttime.

**A STUDENT IN A COFFEE SHOP**, wondering how she can get the smoky eyes look.

ZMOT is any moment when you grab your laptop, tablet or mobile phone and start learning about a product or service you're thinking about trying or buying. I'm sure you know what I mean — you probably do this every day.



## **BUT...**

Would it surprise you to know that Asia Pacific will become the **world's largest eCommerce region** in 2014 at \$500 billion? <sup>2</sup>

Or that more than 40% of consumers in key Asian markets say they **use a smart phone to shop**? <sup>3</sup>

Or that 1 in 3 Internet users in Asia say they **spend up to 50% of their CPG research time online** — more than in Europe, the Middle East or Africa? <sup>4</sup>

Those numbers shouldn't surprise us anymore. This is how consumers live and learn and make decisions today: from ratings and review websites, from beauty and lifestyle blogs, from friends on social media. We learn from search results, user comments, four-star ratings, text ads, image ads, news headlines, and official brand websites.

We learn and decide at the Zero Moment of Truth.



## **Let's take one step back.**

On September 21 of 2005, *The Wall Street Journal* published a front-page story that really changed the face of marketing.

That story was about the critical importance of the seven seconds after a shopper first arrives at a store shelf full of aspirin or toothpaste or any consumer product. It's the moment when you're standing there, scratching your head, looking at all those cooking sauces and deciding which to buy.

Procter & Gamble called that moment the First Moment of Truth, or FMOT ("EFF-mot"). This moment was so important to P&G that they created a position titled Director of FMOT.

Fast forward to 2013, and CEO A.G. Lafley made this statement in the P&G Annual Report:

*We have to win at the first moment of truth, when the consumer chooses our product at the store shelf, and the second moment of truth, when the consumer uses the product at home and decides whether to buy it again. We also have to win at the "zero moment of truth," when the consumer discovers information about our brands and products before they shop.*

We couldn't agree more. Those first and second moments of truth are just as vital today.

## AND...

Now there's a new critical moment of decision that happens before consumers get to the shelf. Whether you sell cars or shaving cream, your customer's first impression — and quite possibly her final decision — will be made at ZMOT.

Marketers devote tremendous amounts of energy and money to the first two moments of truth. But the new question is: Are you winning the Zero Moment of Truth?



We've spent a lot of time thinking about this question at Google. ZMOT is an essential concept for Google sales teams around the globe. (Our Australian team, naturally, calls it ZedMOT.) It's part of our DNA to work with advertisers and brands to win the moments that matter.

Let's go back to my story about my colleague in the taxi. Not so long ago, my next stop would have been a department store cosmetics counter, where they would have done a diagnostic to see if the product was right for me. (It would have been, of course!) Then I would have bought the product right there.

But in my journey today, I never even made it to the cosmetics counter. I went straight online. My colleague's endorsement plus my own online learnings were enough to make me try the product.

Toby Desforges, co-author of *The Shopper Marketing Revolution* and founding partner of the consulting firm engage, has been working with CPG brands in Asia for over 15 years. Here's what he says about such moments:

*"What's really interesting about ZMOT for me is that it provokes the question: when is somebody a consumer and when is somebody a shopper? From the moment of picking up the tablet, she has changed from receiving information about a brand to becoming a potential shopper."*

*ZMOT creates a really clear point of entry into the shopping process. It's the first step from just pondering something to actively thinking about buying it."*

We wanted to know more about how these ZMOT moments happen in Asia for the CPG industry, so we commissioned a major study from the independent research firm TNS. They talked to over 8,000 female shoppers across 8 different Asian markets: China, India, Indonesia, Korea, Malaysia, the Philippines, Singapore and Thailand. The surveys were specially designed to show exactly which sources influenced buying decisions in 6 categories of consumer packaged goods. We'll share that research with you for the first time here.



If you're the type who likes to know what's coming, I'll tell you right now what you'll find in this book.

- **The buying journey has changed.** ZMOT is a vital new addition to the classic three-step process of stimulus, shelf, experience.
- **What was once a one-way message is now a many-way conversation.** Shoppers today find and share their own information about products, in their own way, on their own time.
- **Word of mouth is essential.** Just as it has been since caveman days. But now it happens, far more powerfully, online.
- **No product is too small for its own journey.** If consumers will do research online for houses and health care, they'll also do it for diapers and shampoo... and they'll even make those purchases online.
- **Consumer and shopper marketing are coming together.** The "Great Wall" between the two is coming down. In digital it's all the same consumer, all at once.

We've talked with a number of leading brand marketers and commentators in Asia and we'll be sharing their ZMOT wisdom with you: how to know what customers are looking for, be part of the conversation and win in Asia.

*Let's get started.*



# CHAPTER 2

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## THE NEW MENTAL MODEL

*“Winning at ZMOT is becoming an integral part of Procter & Gamble’s marketing strategies. ZMOT allows consumers to make more informed choices on options prior to getting to the store. If we don’t communicate our brands’ superiority when she is browsing or searching, our brands will not be in her core consideration set.*

*Leading this change is part of our DNA at P&G. In the 1930s it was radio, in the ‘50s it was television and now our challenge is to lead the digital revolution.”*

— **Freddy Bharucha**  
Chief Marketing Officer Asia  
Procter & Gamble

**“Human beings can’t run a mile in under four minutes. It simply isn’t possible.”**

Sound crazy? It does now. But for decades it was a common point of view. It was a mental model: an assumption about how the world worked. As Jim’s friend, Professor Jerry Wind of the Wharton School, tells the story:

*The four-minute mile seemed like a physical barrier that humans could not cross... until May 6, 1954. That was the day that Roger Bannister, a medical student at Britain's grand old University of Oxford, ran a mile in 3:59.4. He broke the barrier. Suddenly, in the next three years, 16 other runners cracked the four-minute mile as well.*

*Was there some breakthrough in human evolution? No. What had changed was the mental model.*

As it happens, there's also a classic mental model for marketing. For decades we've focused on three critical moments:

**Stimulus.** A young mom is watching a reality TV show and sees an advertisement for moisture-intense disposable contact lenses. She thinks, "I hate how I look in glasses. I'd like to try those."

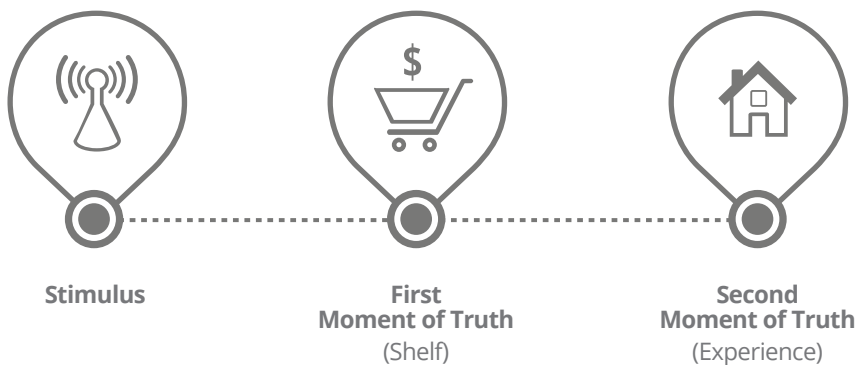
**Shelf.** The next day she makes an appointment with an optician, who tests her eyes and shows her a few different promotional options. She goes for the brand she saw on TV.

**Experience.** The young mom goes home, tries on her contacts, and wears them that weekend for a visit with her family. She feels and looks great. A happy ending.

Those three steps have been the mental model of marketing for a long time.

Figure 2-1

### The traditional 3-step mental model



But the big news for marketers today is the critical new moment between stimulus and shelf in every product category.

Today that young mom still watches her favorite reality TV show and sees the advertisement. But instead of waiting to make an appointment with the optician, she grabs her smart phone and searches for the contact lens brand she saw. She finds reviews, videos, sites for competing brands, and even ads for contact lens alternatives like laser surgery.

While she's still watching her show, she clicks around, reads and compares, and narrows her choice down to a shortlist of 2 brands. Then she posts on Facebook to ask friends if they've tried either kind. Before the show ends – and long before she gets to the optician – she's made her choice.

“Search is an active mindset,” says Rowena Millward, Regional Managing Partner, Asia-Pacific, for Johnson & Johnson. “The shopper has a question and she wants the best answer to that question. That's why search is the gateway to ZMOT. It's the point where shoppers and consumers are really considering brands — where they'll actually decide if you're in their consideration set.”

“One of the things we talk about within J&J is that stimulus is often reinforcing the mindset of people who are already buying you. But people at ZMOT are asking questions and taking action — they're all about incremental volume. So a huge opportunity for business growth comes from ZMOT.”

These consumers are undecided, and as a marketer, you have the chance to pivot them to decision.

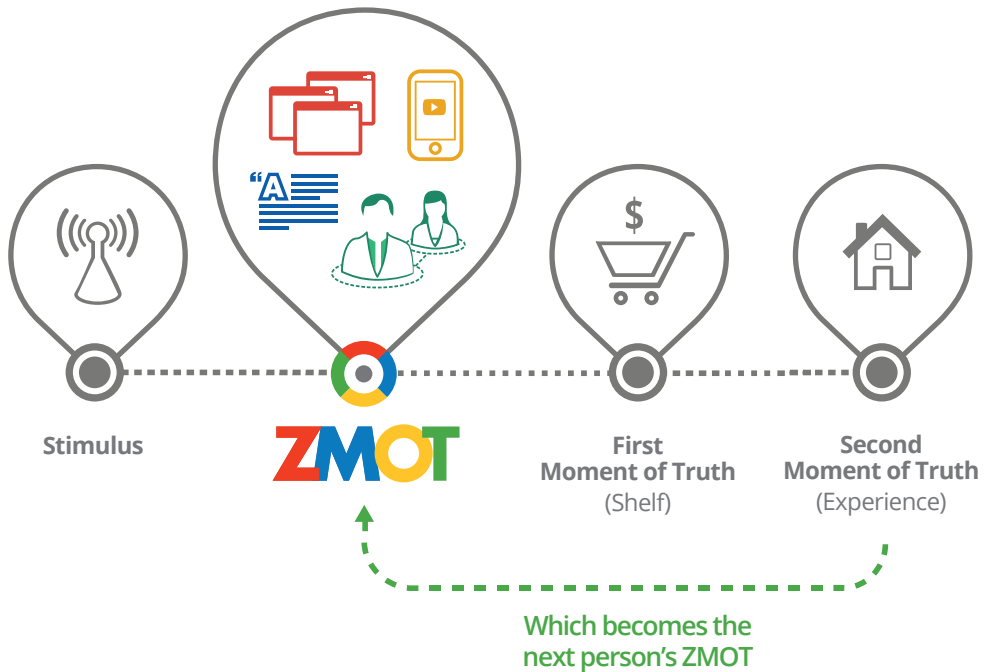
If you're a brand manager, you've got policies, training, shopper marketing agencies, partners and budgets to win those original three steps of stimulus, shelf and experience. But who and what do you have in place to win that grab-the-tablet moment — the Zero Moment of Truth?

For many CPG companies, the answer is “not enough.” According to recent reports from Zenith Optimedia Asia Pacific, online consumers have shifted well over half of their media time to digital — but advertising continues to lag, with only one-fifth of spending online.<sup>1</sup> “Digital window shopping,” as Forrester calls it, is skyrocketing but online marketing budgets are playing catch-up.

Change your marketing model to include ZMOT, and you'll reach those millions of shoppers who are making decisions before they enter the store.

Figure 2-2

## The new mental model



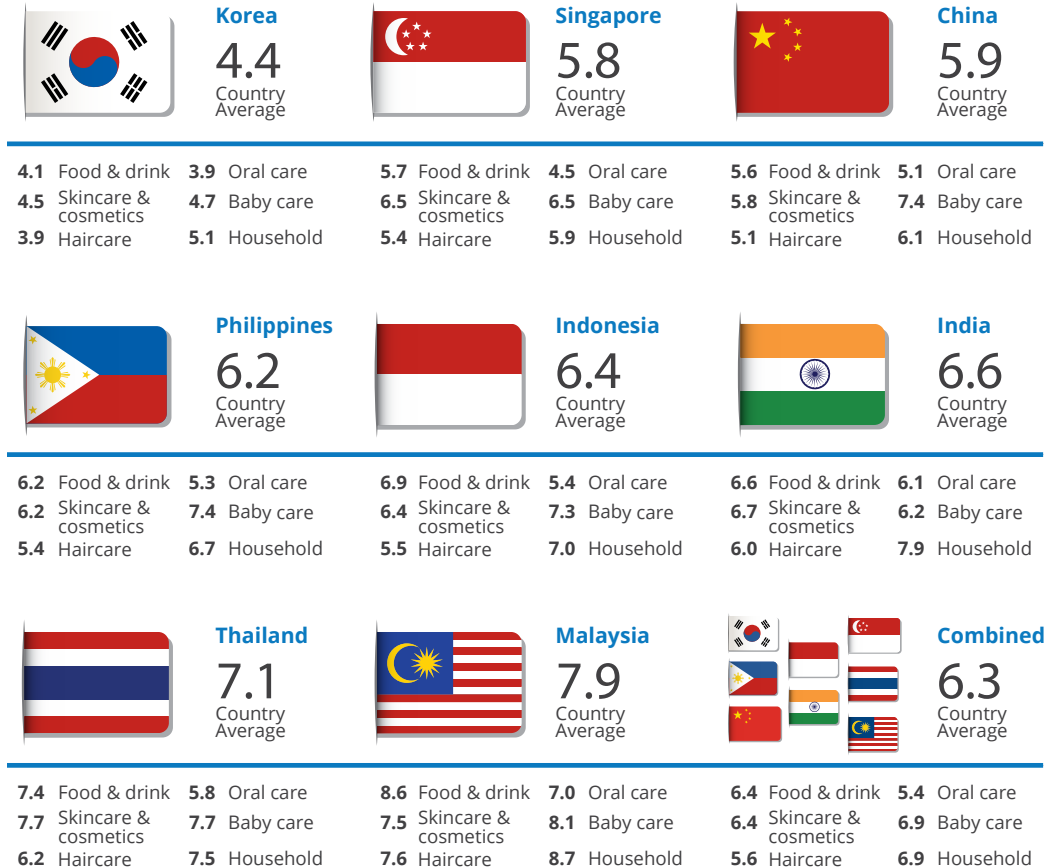
Just how important is ZMOT in driving decisions? Google asked TNS to do a comprehensive study of 8,000 women shoppers in Asia across six CPG categories: food & drink, skincare & cosmetics, haircare, oral care, baby care and household products. We wanted to know exactly where influence takes place as shoppers move from undecided to decided.

The TNS Female Shoppers Study revealed that the average Asian woman uses 6.3 sources of information to make a shopping decision. Those 6.3 sources range from TV commercials and magazine articles to recommendations from friends and family, to websites, ratings, social media and blogs online.



Figure 2-3

## Number of sources used when making last purchase decision



Source: TNS Female Shoppers Study, Q4 2012. n= 8,000.

As you can see in Figure 2-3, in developing markets the numbers were higher: over 7 average sources in both Thailand and Malaysia. Women in developed markets used fewer sources: 5.9 in China, 5.8 in Singapore and all the way down to 4.4 in Korea.

What's going on here? We think this shows a correlation between low GDP and consumer confidence at ZMOT. When money is tight, you have to be double-sure you're making smart choices. You scout around through multiple sources to get the information you need. You search more, verify more, and take the time to look at an extra site or more reviews.

By contrast, in the more digitally-developed Asian countries, consumers are ZMOT veterans. They've developed a repertoire of trusted sources. They surf a few sites, get the information they need, and get out.

In terms of categories, we see the highest number of sources being used when shopping for baby care and household products. (Household items in Malaysia had the highest number of all: 8.7 sources.) That may seem surprising for a low-involvement category, but it shows the relative importance of core product purchases, like diapers and detergents, versus more personal and perhaps extravagant items like skin and hair care or cosmetics.

If you read Maslow's Hierarchy of Needs in school, you recognize the pattern. Basic needs come first. Social and self-esteem needs like fabulous hair are slightly less urgent.

In the TNS Female Shoppers Study, you can see that shoppers today are digging up more information, from more sources, before they buy. In fact, ZMOT is now just as important as stimulus and FMOT. Here's how those sources look in chart form, divided into stimulus, ZMOT and FMOT. 78% of the shoppers saw ZMOT as an important step in moving them from undecided to decided.

Figure 2-4a

### Sources used by shoppers when making purchase decisions by type [summary — all markets, all categories]

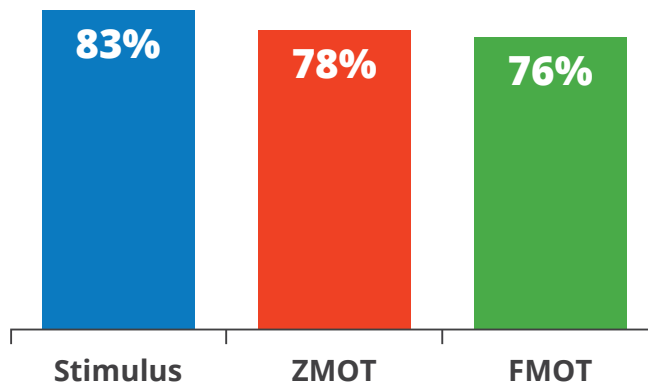
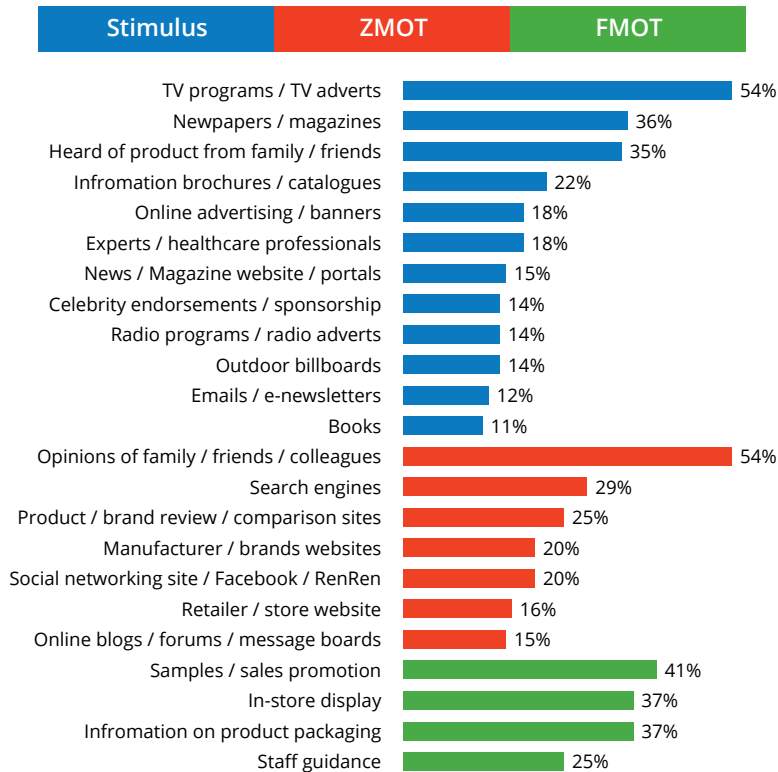


Figure 2-4b

## Sources used by shoppers when making a purchase [by source] — all markets, all categories



Source: TNS Female Shoppers Study, Q4 2012. n= 8,062. All markets. [QD2b: When you were considering buying [CPG PRODUCT], what sources of information did you USE to help your decision? All categories included. Base: Total (n=8062), SG (n=1000), CN (n=1000), KR (n=1004), MY (n=1004), IN (n=1004), ID (n=1017), PH (n=1017), TH (n=1016)]

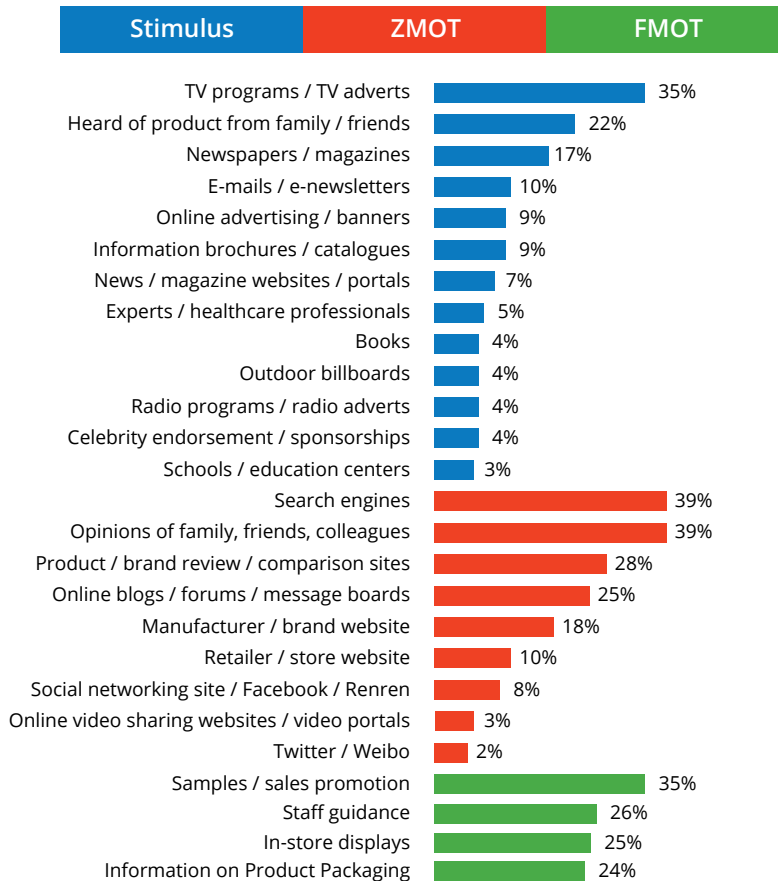
When we look at this in more detail, we see that at ZMOT, 1 in 2 shoppers seek the opinion of friends, family or colleagues before they go into a store to make their purchase. It's that most human phase of validating options by making a call, posting a question or simply asking others what they think.

Search engines are ranked as the most used digital source by nearly 1 in 3 shoppers — more important than product review sites, brand sites and even social networking sites. As most of the markets surveyed are in the nascent stages of digital, this behavior is consistent with what we've seen in digitally-mature markets: Search engines are a popular gateway to ZMOT.

To illustrate this point, take a look at the data below through the lens of a developed market. (In this case, Korea.) Here we see that ZMOT sources rank most highly, with search and opinions level as the most-used sources for 39% of shoppers, outweighing TV advertising and FMOT.

Figure 2-4c

### Sources used by shoppers when making a purchase in Korea



Source: TNS Female Shoppers Study, Q4 2012. All categories included. Base: Korea only, n= 1,004. [QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you USE to help your decision?"]

As development happens, ZMOT happens.



It's not news that shoppers like to do research. Shoppers have always talked with each other at a kopitiam as they tried to learn about products on their own, or fished for wisdom from the elders in their family.

But in the past, that research was mostly limited to the environment of friends and family. Fresh, detailed and useful product information was the exception.

## *That exception is now the rule.*

Today there are no barriers to access. We're on our way to a billion mobile broadband subscriptions in our region, and more mobile phones will be shipped in 2013 than PCs. <sup>2</sup> Add the growth of low-cost wifi and entry-level smart phones for less than \$50, and you can see that more and more, the entry point to the Internet is not PCs but mobile.

Internet penetration is less than 35% in developing markets, but we see this changing as developing markets leapfrog developed markets. <sup>3</sup> That point isn't far away, as Nihar Das, the Regional Managing Partner for Asia-Pacific for MediaCom, points out: "Last week I was in Thailand and even with the low- and middle-class consumers, all of them now have a smart phone. They seem to think it a very necessary gadget to have."

These wired shoppers are not passive, either. They feed back what they learn, creating their own consumer guides a million times a minute with reviews, tweets, blogs, social network posts and videos for products of all kinds.

This is the new mental model and the new conversation we all have to be a part of.

Note that all three of the original steps — stimulus, shelf, experience — are still essential. What's changed is that the stimulus now drives consumers to a new stopover on their way to the shelf. When that young mother began searching, the information wasn't dropped onto her from above — she actively hunted for and pulled down what she wanted.

Kim Kadlec, Worldwide Vice President, Global Marketing Group, Johnson & Johnson, describes the change in mental models this way:

*We're entering an era of reciprocity. We now have to engage people in a way that's useful or helpful to their lives. The consumer is looking to satisfy their needs, and we have to be there to help them with that.*

The wonderful potential of this, if you're willing to work at it, is to have an intimate relationship with consumers.

Ian McKee, CEO of Vöcanic, one of Asia's leading social media and word-of-mouth marketing agencies, puts it this way: "Your puppy dog is always happy to see you when you come home, right? Every day, any time of day? Brands need to be that puppy dog. Always happy to see and engage with the consumer any time of day, any day, about anything."



Grab your own smart phone or tablet right now — it's probably right next to you, right? — and go to your favorite search engine. Enter the name of your company's flagship product, or of any other product you like.

You're likely to see the official brand site for that product near the top of the search results. So far, so good.

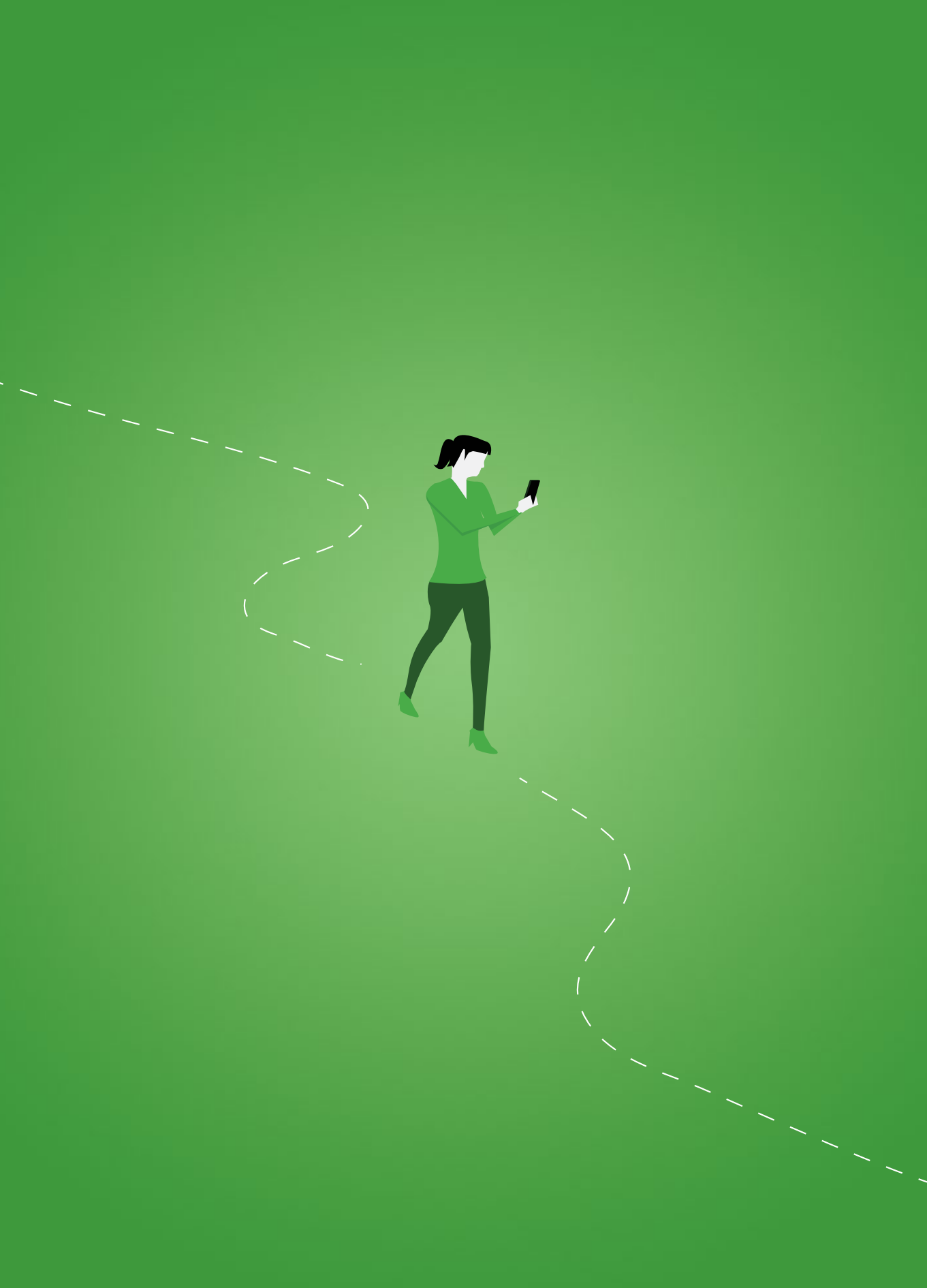
Now enter the name of that product and add the word "reviews." Then do a new search and try putting the word "best" with your product category: best skin cream or best detergent, best twin-blade razor, best diaper for newborns, whatever you like. Now what else do you see on the page? I'm betting you see ratings and opinion sites, online stores, images, demonstration videos... and competitor sites.

***This is the information your shoppers  
now use to make their decisions.***

The question for you: Are you happy with what you see? Based on what you see, will somebody buy your product? Can they even find your product?

This is the digital shelf today. Consumers arrive here, 24 hours a day, ready to engage, and increasingly ready to buy. They're anybody's to win or lose. The opportunity is palpable; are you ready for it?

**(The world record for the mile, by the way, is now down to 3:43.13.)**<sup>4</sup>





# CHAPTER 3

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## ZMOT ALL AROUND US

*“15 years ago we had three key sources of stimulus: TV, PR, word of mouth. And at least two of those were owned by the marketer. What has changed is that we don’t take the marketers’ message at face value. We now say, ‘Hey, I’m going to take control and responsibility over my product education.’”*

*At ZMOT we’re now presented with the chance to have infinite information about the brands we’re interested in.”*

— Toby Desforges

Co-author, *The Shopper Marketing Revolution*

### **What makes a Zero Moment of Truth?**

- It happens online — typically starting with a search on Google, Baidu, Bing, Naver, YouTube or any other search tool or engine.
- It happens in real time, at any time of the day. More and more, it happens on the go: more than 50% of all Asia-Pacific CPG searches are now on mobile. <sup>1</sup>

- It's emotional. The consumer is driven to satisfy her needs, and she has an emotional investment in learning more and finding the best solution for her.
- The conversation is multi-way: marketers, friends, bloggers and vloggers, websites and experts all have their say and compete for attention.
- More and more, it doesn't happen on your official site. Research by Forrester shows that visitorship to brand websites is declining at about 5% a year. <sup>2</sup>

Last chapter I mentioned that 78% of the decision-makers in our TNS Female Shoppers Study used ZMOT sources to guide them. We also asked those shoppers to rate how influential each source was. For those who used online sources, these were the key stats:

**60%** were ready to buy, seeking prices and deals

**56%** were looking for a brand name or features

**50%** were comparison shopping

Marketers are used to talking about the purchase process as a funnel: Consumers are driven through the broad opening by ads or other stimulus, their choices are narrowed down, and then they drop out the bottom with a purchase. It's a very linear way of thinking.

But talk to shoppers today about their path to purchase, and you'll get surprisingly nonlinear answers. Shoppers don't always move through a funnel, narrowing choices as they go; at ZMOT, they can actually widen their choices. The more they learn, the more options they consider, and they zigzag back and forth between them until they're ready to make a decision.

"It's no longer a one-way funnel," says Rowena Millward. "The traditional model was the mass spray-and-pray approach. You get people's awareness, and then you bump them up to consideration, and then you bump them up to trial, and then hopefully you get some loyal users... if your product's OK."

"But when you look at individual shopper journeys now, it's more like a game of pinball: 'I saw some stimulus, and then I saw advocacy, but it didn't convince me to purchase, and then I heard from my doctor about how good this product is,' and so on. Maybe it takes one person one month to get there, from four different touch points. But another person might take 10 months and need 15 touch points. The path to purchase is now a personalized bounce to purchase."

ZMOT has as many motivations and takes as many forms as there are people online. Here are some classic ZMOT triggers:

## *Seeking and Sharing New Ideas*

Millions of times a day, Google sees searches like this: *Diwali dishes, whole meal bread recipe, gluten-free muffins, how to make mooncakes, and Chinese New Year treats.*

Recipes make up an amazing 1% of all global searches on Google.<sup>3</sup> Today's cooks go online to seek out new ideas and deeper details on ingredients and healthy eating. They find more than recipes, too. They find stories and reports from food and family magazines, ratings and demos on sites like SanjeevKapoor.com, TarlaDalal.com, Manjula's Kitchen on YouTube, RasaMalaysia.com, or the Jamie Oliver or Cadbury Kitchen baking communities on Google+.

Sure, recipes can still be found on labels and packaging. But today many shoppers have already been inspired, or made their choice of what to buy and cook, before they reach the store.

## *Getting Ready to Bargain*

A bride-to-be walks into an appliance store and says to the clerk, "I want the LG high-efficiency 4.7 cubic foot top-loading washing machine, model number WT5070CW, with 1100 RPM spin speed and a one-year full warranty. I would like it in white. And I want to know if you will match the free home delivery that your competitors offer online."<sup>4</sup>

What just happened here? ZMOT happened. This smart customer started her shopping journey with a search for "large capacity washing machines." She saw ads from LG, Samsung and five other brands, looked at reviews from Compare India and MouthShut.com, and a lot more.

Later she switched to searches like "ratings for LG washing machines" and found reviews from many sources. Then she looked at different retailers online to compare prices. Then she went to the LG official site to check colors, energy consumption, and other specifications.

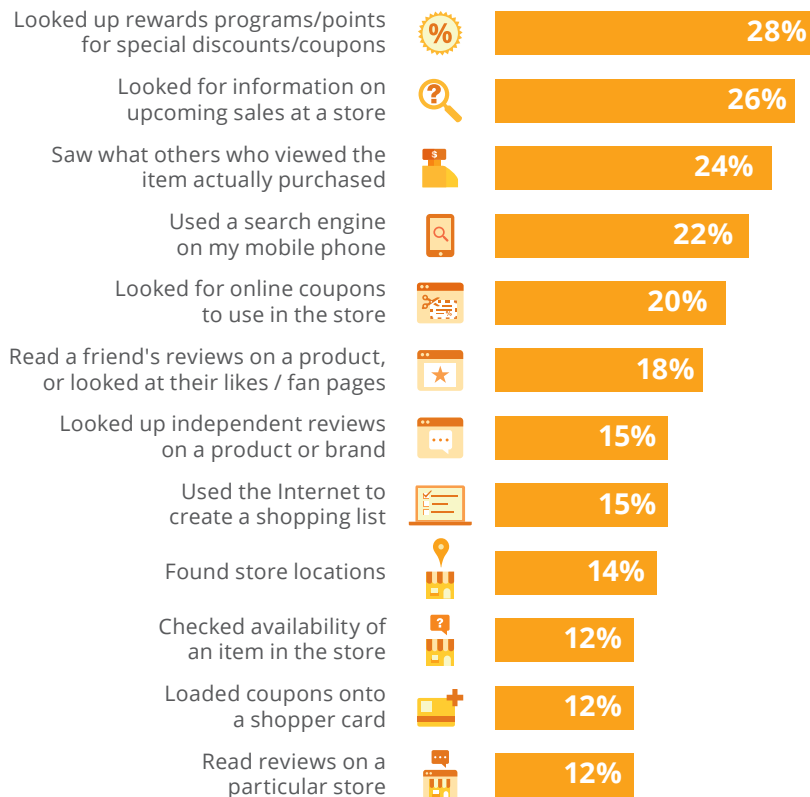
If you've made a major purchase lately, you've probably seen this woman in the store holding a handful of ZMOT printouts, or showing prices and examples to the salesperson on her smart phone screen. Maybe you've been that woman yourself.

## Finding Prices and Stores

What else do shoppers learn at ZMOT? In the charts below, for skincare and cosmetics in Korea, they're looking for price-related information like coupons and discounts. They use search on their mobile phones to find the best prices, create shopping lists and find out how to get to the store. It's all about making a smart decision to save time or money. In contrast, in Thailand, beauty shoppers are less confident and are looking for endorsement, so learning from others is most important.

Figure 3-1

### Top reasons for consulting the Internet: skincare & cosmetics in Korea



Source: TNS Female Shoppers Study Q4 2012

Figure 3-2

## Top reasons for consulting the Internet: skincare & cosmetics in Thailand



Source: TNS Female Shoppers Study Q4 2012

## *Making Smart Choices Fast*

Let's go back to the mother-to-be on a bus who we mentioned in chapter one. Her ZMOT looks like this: She isn't feeling well, and now she's on the go and searching for a decongestant. She's looking for:

1. Safety information about the product, and
2. Experiences that others have had with the product, and
3. The nearest store that's open right now

So when she sees that a particular decongestant has good ratings, and that her local pharmacy is open late, that sale has been made.



You see the advantage. If you're available at the Zero Moment of Truth, your consumers will find you at the very moment they're thinking about buying. To reach them, you must go beyond just defining the territory you want your brand to play in. You need to become visible where the consumer is most likely to be in an active, receptive mindset. Look for trigger points like these:

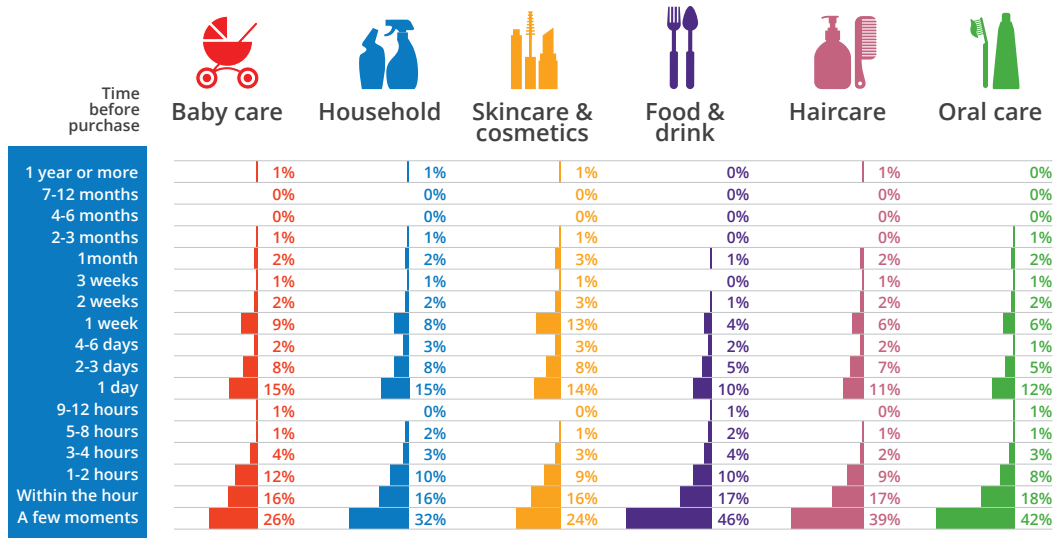
- **Lifestage:** puberty, getting married, first baby
- **Season:** back to school, Chinese New Year, kids' birthday parties
- **Environment:** avian flu, weather, travel
- **Location:** near a store, in a store, at home

When you know these are the triggers, you can switch shoppers to your brand.

The "dwell time" that consumers spend during ZMOT is also much longer than the time they'll spend at a store shelf. Here's a visualization of purchase cycle lengths across the six CPG categories we surveyed:

Figure 3-3

Percentage of time spent planning a product purchase



Source: TNS Female Shoppers Study, Q4 2012. All categories, all countries included; n=8004. [QD2a: "In total, how long were you thinking about buying [this product] before you actually purchased it?"]

That’s a lot of dwelling. You can see planning in all categories happening a day to a week before purchase, with a higher incidence in skincare. Very little activity is happening more than 1 month out.

ZMOT gives you a powerful way to truly influence customers in those “before the store” moments.



ZMOT becomes even more important when money is tight.

Many families in Asia can’t afford to waste money when buying everyday items like groceries, because they need that money to get to work, to pay bills, or to pay for their children’s education. This is even more pronounced in the developing economies.

Nihar Das of MediaCom tells me that while everyone does research online, the motivations are often different according to class: “While the affluent audience is doing research to figure out a right

choice, the mass low-income audience is using it as a resource to figure out how to get the best value for their money."

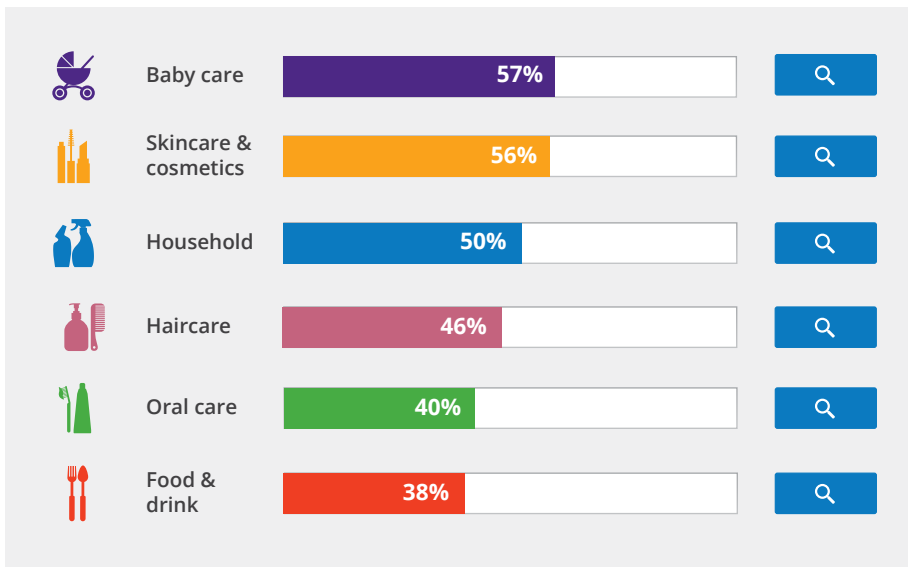
*The Wall Street Journal* noted the importance of value in an article titled "In-Store Sales Begin At Home," which also applies to Asia:

*It's well known that consumers research expensive products like electronics online, but coming out of the recession, consumers are more scrupulous about researching their everyday products such as diapers and detergent, too. More than a fifth of them also research food and beverages, nearly a third research pet products and 39% research baby products.* <sup>5</sup>

We can see that from the study results below, with over 45% of female shoppers having used search for their last baby care, skincare, household or haircare purchase.

Figure 3-4

### People who used search for last purchase by category [%]

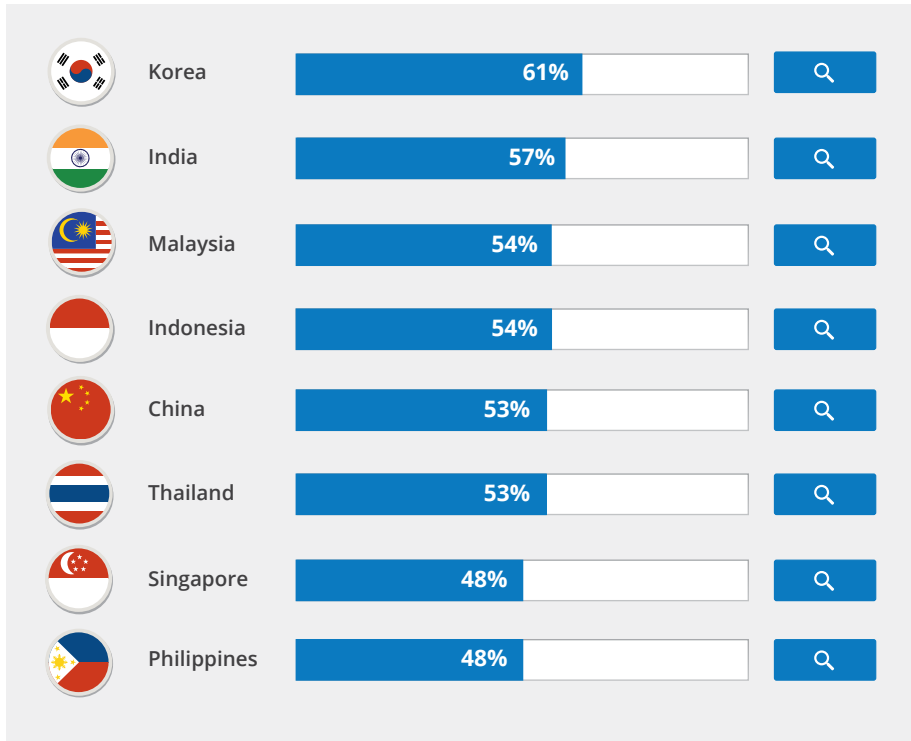


Source: TNS Female Shoppers Study, Q4 2012. QD2c: Role of research (n=8004). All markets, categories. Based on last purchase occasion.



Figure 3-5

## People who searched online for last purchase by market [%]



Source: TNS Female Shoppers Study, Q4 2012. QD2c: Role of research (n=8004). All markets, categories. Based on last purchase occasion.

So: Moms, dads, cooks, domestic workers, busy executives, and people of all kinds are doing research before they shop. And they're getting better deals, saving time, and taking control of their shopping journey.

There are two heroes in all these stories: the shopper who does the research, and the retailer or marketer who is smart enough to be there and ready to have a relationship at the moment the shopper is looking for them.

Start helping your consumer when they enter the active mindset. Meet them when and where you have shared interests. That's the beauty and the promise of ZMOT.



# CHAPTER 4

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## RATINGS AND REVIEWS: WORD OF MOT

*“Vöcanic was founded on a mantra we still believe in today:  
‘There is nothing more valuable for your brand than a  
personal recommendation from one friend to another.’”*

— Ian McKee  
CEO  
Vöcanic

**The tremendous explosion of ratings and reviews online has changed how people get information. But this change is still based on that oldest of human traits: word of mouth.**

The difference is that now, that word of mouth is written down.

“The ‘killer app’ of the Internet always has been to connect people so they can share information,” says Ian McKee. “That started with email and bulletin boards. It’s really the evolution of one basic human need, one that’s been baked in for millennia, which is to be connected.”

“But until now, brands have had only one avenue to participate in that connection: interruption

media. They bought the right to interrupt me and tell me about their soap powder. What's changed is how much peer-to-peer information flow has been enabled by the Internet."

That's why shoppers are talking about your product, every day, on a dozen sites you've heard of and a thousand sites you haven't. There are star ratings, reviews and raves online for every last detergent and multivitamin in your local store. Wondering what's the best business school, high school or kindergarten in your area? You'll find out at ZMOT. It's where opinions are shared and decisions are made.

### ***What does word of mouth look like online?***

- Consumers talking directly through email, social networks, chat and IMs
- Reviews on sites like Weloveshopping, TripAdvisor, Lazada and Yelp
- Comments and ratings that show up next to businesses on applications like Google Maps
- Message boards on corporate and retail sites of all kinds
- Online community sites where groups like moms, chefs or golfers compare notes and share information
- Seller ratings in search results (search for "kids' bikes" on Google and you'll see the stars right at the top)

But there's one critical difference between old-fashioned word of mouth and the digital version. "Talking over a coffee is one-to-one," says Jim's friend Dave Reibstein, professor of marketing at The Wharton School. "Digital word of mouth is one-to-millions. If you have a good experience, it's shared and re-shared with millions. You post it and suddenly, it's flying."



### ***Audiences are asking three things about your product:***

- Will it save me money?
- Will it save me time?
- Will it improve my life?

When people ask each other about your product at ZMOT, you can assume they'll be talking about one of these three things.

They probably already have a general idea of what they want. “I know a new smart phone is going to cost \$300. I have the \$300. I just want to make sure I buy the very best phone I can for that money.” What they’re looking for is information, or validation, from friends that will help them make that choice.

And you can bet that what they read will help them make their decision. That’s why they’re sitting in the coffee shop down the street, tapping away on their mobile phone, after all. Ratings and reviews are little signposts left by decision-makers for other decision-makers.

Ian McKee believes that three criteria determine whether a piece of information gets widely shared:

1. **It has to be remarkable.** No one shares information that is boring. Your content must be worthy of someone re-mentioning it.
2. **It has to be personally relevant.** That is, relevant to users and their friends. As Ian puts it, “If I told you that a surprising number of Asian elephants suffer from septicemia, you’re not going to run out and tell your friends. It maybe true and it may be remarkable, but we’re not going to be talking about it tomorrow.”
3. **It has to be valuable to know.** Can it help you make smarter decisions? Can it entertain you? Is there value in sharing it with your friends?

Such ideas are often very different from what a creative agency will come up with for a brand, Ian notes. But if you want people to share your brand, you need to find and create stories that fulfill these three things.



CMOs and brand managers tend to get nervous about online ratings and reviews — especially about opening up their own sites to user comments. What if somebody says something negative? What if a whole lot of people do?

My answer to that is: don’t worry. Here’s why:

***Most reviews are good.*** The worldwide average for product reviews is a 4.3 out of 5.0, according to Brett Hurt of the American company Bazaarvoice, which provides customer conversation services to global companies like Estee Lauder and Adidas. In fact, he says, 80% of all reviews online are four to five stars.

That’s not all: “We find that there’s a new version of the 80–20 rule: 80% of reviews on the site of a

given retailer are written by the top 20% of their customers by lifetime value. We call them the super shoppers.”

The message is simple enough: People like to talk most about the products they love the most.

***Bad reviews aren't all bad.*** “People are scared to death of messaging not being all positive,” says Wharton’s Prof. Dave Reibstein. “But negative comments add authenticity.”

Brett Hurt puts it another way: “Fear of the negative is the thing that still really holds back adoption of the Zero Moment of Truth. But the truth is, negative reviews increase conversion rates for all kinds of businesses, because people see them and know that they’re shopping in a truthful environment.”

If your product is awful, that’s one thing. But if your product is good (as it surely is) then you really shouldn’t fear the occasional negative comment.

***The conversation is already going on.*** Right now, people are talking about your product online. You can’t start it or stop it. You can choose not to engage, but that’s really like sticking your head in the sand while a competitor jogs by to grab your customers. Better to welcome the conversation, join it and build a relationship.

“Relationships are what create loyalty,” says Ian McKee. “I have a relationship to my colleagues or to my children because we have an exchange. I don’t have a relationship to the announcer at the train station. He gives me valuable information, yes, but there’s no exchange, no dialogue and hence no relationship.”

If your brand wants a relationship with customers, you need that two-way exchange. That’s the value of social media: it enables that kind of dialogue, while most brand websites don’t.

One that does it well, says Toby Desforges, is the brand website for Pampers diapers.

*“The first question they ask is, ‘How old’s your baby?’ What they’re really saying is, ‘We know you already know something about diapers. We want to know about your child and your relationship.’*

*Enter your baby’s age and it tells you, “She should be wearing this particular type of diaper.” The brand imagery is still there, the brand message is still going on, but you’re getting*

*someone to talk about their needs. And you're getting them to think about buying. It's pushing people into the journey that Pampers wants shoppers to go on."*

And they continue to build a dialogue with you via Facebook and email, keeping their brand front of mind and actively involving you as you move through your journey from amateur mom to professional mom!



Why would people make decisions based on ratings and reviews from strangers, you ask? They don't. They make decisions based on the opinions of people like themselves. We all look for others who have been in the same situation as we are now. We know that fellow consumers (unlike advertisers) aren't trying to sell us something.

As I noted earlier, the TNS Female Shoppers Study shows that 54% of shoppers find word of mouth to be an influential driver when making decisions.

Most of us have empathy for people who are right behind us, going through the same thing. And if we can make it easier for them, we do. This is why interest-based communities are becoming so important to us all.

That's especially true in Asia. "Southeast Asian markets are extremely collective in their outlook and their attitude," says Nihar Das of MediaCom.

"For example, Indonesia is the highest repost market on Twitter in the world. They're not the market that generates Tweets: they're the market that reposts Tweets. So they often participate by supporting the opinion rather than generating the opinion. Shoppers in these regions like collective social validation before they make a decision."

The truth is that we simply care what other people think.

Google is so convinced of this that we created the +1 button, which lets anyone recommend products, services and websites to friends with a single click. While looking at a website or even at search results, you click the "+1" button to tell your friends, "I'm a fan of this." Next time your friends search, they will see your recommendation below the search result for that page. You become part of their ZMOT.

A kind of super-value is created when search and social media are combined this way. It's classic

word of mouth, like asking friends if they've tried a certain mascara or if they know a good business hotel in Bangkok.

Figure 4-1

## Example of Google's +1 button in search results

[Hotels in Bangkok - Special Rates in Bangkok - Agoda.com](#)  
[www.agoda.com/Bangkok](http://www.agoda.com/Bangkok) ▼  
★★★★★ 4,190 reviews for agoda.com  
Don't Miss Out, Book Now!  
184 people in Singapore +1'd this

Most Popular	Budget Hotels
5 Stars Rating	Luxury Hotels

[Bangkok 5-Star Hotel - Elegant Comfort In A Thai Sanctuary](#)  
[www.shangri-la.com/Bangkok](http://www.shangri-la.com/Bangkok) ▼  
Exclusive Rates Booking Direct Now!  
Shangri-La Hotels and Resorts has 539 followers on Google+  
Free In-Room WiFi, Book Online Now - Check Out Our Exclusive Offers

[Top Bangkok Hotels - expedia.com.sg](#)  
[www.expedia.com.sg/](http://www.expedia.com.sg/) ▼  
Best Price Guaranteed on **Hotels** in **Bangkok**. Hurry - Book Online Today!  
Expedia has 1,497,134 followers on Google+  
Over 145,000+ Hotels Worldwide - Save on Flights - Weekend Getaway Deals

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Source: Google search 20 August, 2013

This is word of mouth that you can find exactly when you need it. You don't have to comb through emails or hope you can find the right friend at the right moment. If I search for a family hotel online and six of my friends have given it a "+1," my decision is made.



Let me make another point about ratings and reviews online: They're a tremendous resource for customers, but they're also a tremendous resource for businesses.



“If marketers are missing the ZMOT opportunity, what they are really missing is deep consumer understanding,” says Freddy Bharucha, Chief Marketing Officer Asia for Procter & Gamble. “If they are closely connected with consumer media insights, they will know where consumers are engaging and serve them proactively.”

Ian McKee agrees: “One of the really valuable aspects of digital is that it makes word of mouth findable and measurable. And that makes it unignorable by the brand.”

“When word of mouth gets written down into social media, you can quantify it. I can sit down and tell a client, ‘Your share of voice in social media has gone up 3% this week. And you now have 23% share of voice compared to your competitors.’”

ZMOT is an incredible source of insight for retailers into how satisfied their customers are on a real-time basis, adds James Mounter, Senior Regional Customer Director Asia Pacific at Johnson & Johnson. “Live insight used to be very expensive to get hold of, but there’s now just a fire hose of it which can be used by retailers.”

A machine that lets you know exactly what your customers are thinking as they make product decisions? That shows what they want and need from you? And even lets you reply to them if you want? What a concept.

Except it’s no longer a concept — it’s how people actually share at ZMOT. And it’s happening right now.



# CHAPTER 5

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## EQUAL THOUGHT, NOT AFTERTHOUGHT

*The digital catchup is much faster in developing markets than we expected. The data we get from any of our sources tends to be obsolete in a matter of months. I'm in a constant sense of wonder: 'When will the time arrive when we're actually slightly ahead in our thinking of where consumers are?' They're ahead of all our thinking, all our predictions.*

— Nihar Das  
Regional Managing Partner  
Mediacom

**If there's one truth we'd like you to take away from this book, it's this: ZMOT must be an equal thought, not an afterthought.**

Our Chief ZMOT Evangelist, Jim Lecinski, likes to compare this idea to a moment from the circus. If you've ever been, you'll have seen the act where acrobats keep plates spinning atop a row of tall poles. Business owners and brand managers have always had their own three plates to keep spinning: stimulus, shelf and experience.

You now have a fourth plate: ZMOT. It needs just as much care and attention as the other three. “I believe brands that lead change in the digital landscape, and specifically at ZMOT, will earn a competitive advantage in the marketplace,” says Freddy Bharucha of Procter & Gamble.

Lots of companies today have a “digital strategy” that isn’t really a digital strategy at all. It’s just a media strategy with a few extras tacked on. It doesn’t change the core, and the core is what needs changing.

But change is hard, and every business team has someone who insists that the status quo is fine and nothing needs to change for digital. Let me share a few of the objections to ZMOT that we hear all the time.

***“Nobody looks online for toothpaste or soap.”***

Really? Tell that to Unilever. In the first year after launching their website for Lifebuoy soap, focused on how handwashing can prevent sickness in children, they received 500,000 unique visitors. It’s the #1 most-visited site at Unilever, with the lowest bounce rate. <sup>1</sup>

Lifebuoy now has grown to 3 million online supporters as they spread the message of handwashing to schools, hospitals and communities in developing markets. The brand’s “Help a Child Reach 5” video, with a father giving thanks for his five-year-old son, has been widely shared, with over 7 million views on YouTube and amazing feedback from viewers. It articulates the benefits of Lifebuoy in an emotional, sharable way.

All this for a soap brand sold in developing markets.

How can so many people take time to be interested in soap? Because soap is part of their daily life. Lifebuoy’s program has huge relevance to moms and care-givers all over the developing world.

And because online, the effort is down to zero. Anyone can offer their support, state their opinion, or do research in a moment. You would never get in your car, drive to the library and do in-depth research before buying one bar of soap. The item just doesn’t match the time and effort needed. But now you can pull out your mobile phone and look it up in seconds.

ZMOT is not just for vacations and washing machines. It’s for a \$5.99 bottle of anti-dandruff shampoo

or a \$3.29 box of cereal or that box of tissues. Consumers have learned to apply the strategies they've used for big-ticket items to everyday things.

If people today buy TVs and even cars online, sight unseen... then why wouldn't they buy groceries or toothpaste? Believe me, they do.

***“It doesn't apply to my business.”***

Classic objection. James Mounter of Johnson & Johnson told me a funny story on this topic:

*“I recently went into a meeting with a major retailer. Just to bring it to life for them in a fun way, beforehand I went into Google AdWords and bought my own ad on the keyword for their brand name plus ‘coupon.’ The ad read, JAMES MOUNTER IS AMAZING. Then, during our meeting, I innocently asked them to Google their name with ‘coupon.’*

*My ad popped up and it got a big laugh. But it was also a real turning point in the meeting. Because they suddenly realized that not only was this something they should be doing, it was something that anyone else could be doing to target their business — their competitors included.”*

Lesson: if you're not in prime position when a shopper searches for you, then you're letting your competitors set the agenda for your brand.

If you're a local makeup shop or pharmacy, ZMOT is just as important. 20% of searches across all Google properties are local. That number doubles to an amazing 40% for mobile searches.<sup>2</sup> So if you don't have a presence at ZMOT, then you're losing customers to the businesses who do. They may be your local competitors, or they may be online retailers like StrawberryNet, Taobao, Rakuten, Kaskus, Zalora or Amazon.

Figure 5-1

Last purchase made online by market and category %



**Food & Drink**  
Average: **6%**

11%	Korea	3%	Indonesia
3%	Singapore	11%	India
6%	China	4%	Thailand
4%	Philippines	5%	Malaysia



**Skincare & Cosmetics**  
Average: **16%**

36%	Korea	8%	Indonesia
15%	Singapore	13%	India
27%	China	13%	Thailand
3%	Philippines	10%	Malaysia



**Haircare**  
Average: **9%**

32%	Korea	3%	Indonesia
7%	Singapore	9%	India
12%	China	4%	Thailand
4%	Philippines	2%	Malaysia



**Oral Care**  
Average: **5%**

18%	Korea	2%	Indonesia
1%	Singapore	11%	India
6%	China	1%	Thailand
2%	Philippines	2%	Malaysia



**Baby care**  
Average: **15%**

46%	Korea	4%	Indonesia
11%	Singapore	23%	India
22%	China	5%	Thailand
5%	Philippines	5%	Malaysia



**Household products**  
Average: **11%**

30%	Korea	3%	Indonesia
8%	Singapore	16%	India
15%	China	5%	Thailand
3%	Philippines	4%	Malaysia

<b>Total Average 10%</b>	KOR	CHN	IND	SGP	THA	MYS	PHL	IDN
	29%	15%	14%	8%	5%	5%	4%	4%

Source: TNS Female Shoppers Study, Q4 2012. QD2b. "When you were considering purchasing the product, what sources of information did you seek out to help you with your decision?" Sources of information - Total (n= 8004).

Even though eCommerce sits at an average of around 10%, in categories like skincare & cosmetics and baby care it's averaging around 15%. That's more than 1 in 7 transactions... and rising. Even bulky household products are being bought on the digital shelf. India is right on the tail of China. There's no doubt that as the eCommerce proposition improves across Southeast Asia, and the delivery mechanisms improve, we'll see those markets following suit.

***“We already know how to talk to moms.  
We don't need ZMOT for that.”***

Are you kidding? Moms are everywhere at ZMOT! Today's busy and budget-crunched moms (and dads) make more and more decisions online. Who has time to stand in the aisle in front of 4 meters of diapers and read the backs of all the labels to find the right one? Today's moms are on their smart phones, comparison-shopping for cheaper brands and checking out what their friends recommend.

Rowena Millward says that moms have critical reasons to go online:

*“At Johnson & Johnson we understand the mindset of a woman who's pregnant with her first child: the excitement she feels and her intense need for information and resources. And once the baby is born she's still looking for answers, because she doesn't know what she's doing. Her need for reassurance, for questions to be answered at any time, 24/7, her need to understand the thoughts of other mums, are just as important at that anxious phase.*

*She has questions and she must have them answered, because there's nothing more important to her than the happiness and well-being of her baby.”*

Maybe years ago homemakers would wait for monthly magazines to come in the mail, and that's how they got messages from advertisers. But moms don't have to wait now. They're in command, and it's minute by minute, not month by month. They start the conversation when they're ready for it — at ZMOT.

## ***“It’s not happening in my market yet.”***

Are you sure? Sure enough to stake your job on it?

It is true that there are very different stages of development in Asian markets. The developed markets like Singapore and South Korea do have much higher smart phone penetration and more sophisticated digital behavior. South Korea, Japan and Hong Kong had the three fastest average Internet speeds in the world at the start of 2013, according to Akamai’s “State of the Internet” report. (Next in line was Switzerland.)<sup>3</sup>

But the markets at the other end of the spectrum aren’t all that far behind. Rowena Millward gives her perspective:

*“Consumer behaviors are developing very fast across all markets. In China you’ve got tier 4 and 5 cities where people don’t even have access to proper toilets. Then you’ve got 500 million people in tier 1 and 2 cities who are using digital every day.*

*The behaviors are there even when the broadband infrastructure isn’t. The consumer is racing so fast to that end point, because it just better meets their needs.*

*And as soon as there’s broadband access, those behaviors will jump automatically to a smart phone, and suddenly you’ll have a highly-connected, massive population that is able to partake in all these ZMOT behaviors much more easily.”*

As Rowena points out, mobile is the thing that penetrates the whole market, both city and rural. India has only about 8% smart phone penetration, but they still have nearly a billion total wireless subscriptions out of a population of 1.3 billion.<sup>4</sup> It’s just that right now the majority are feature phones, not smart phones.

“The amount of the population that’s coming into this more developed state every day is huge,” Rowena says. “It really is transformative.”



## “We don’t have the budget for it.”

What’s more likely is that you have the budget but you’re spending it somewhere else. That might be worth thinking twice about, as James Mounter points out:

*“Here in Singapore the #1 influence on skincare purchases is price. But the #2 influence is reviews and recommendations. Around 65% of people say ratings and reviews influence them.*

*Now, way down at #7 or #8 in skincare is advice and information in store. Yet brands and their retail partners still spend a tremendous amount of money on training the merchandisers in the store who give you advice and information when you make a skincare purchase. It might cost a brand, to take a fictional number, \$500,000 to do staff training in a year to make sure that these hundreds of beauty advisors are up to date on the latest beauty product.*

*If I’m that brand, I’d clearly be better off investing that money in a ratings and reviews engine, because that’s the #2 influence. If a consumer types this brand in a search engine, I have to have a clear review and recommendation engine that my retailers can capitalize on.*

*Even if I build a ratings and review engine and give it to my partners it will drive the category more than the in-store advisors. It’s as simple as that. So one of the things that we all have to do is take that money and simply just redirect it.”*

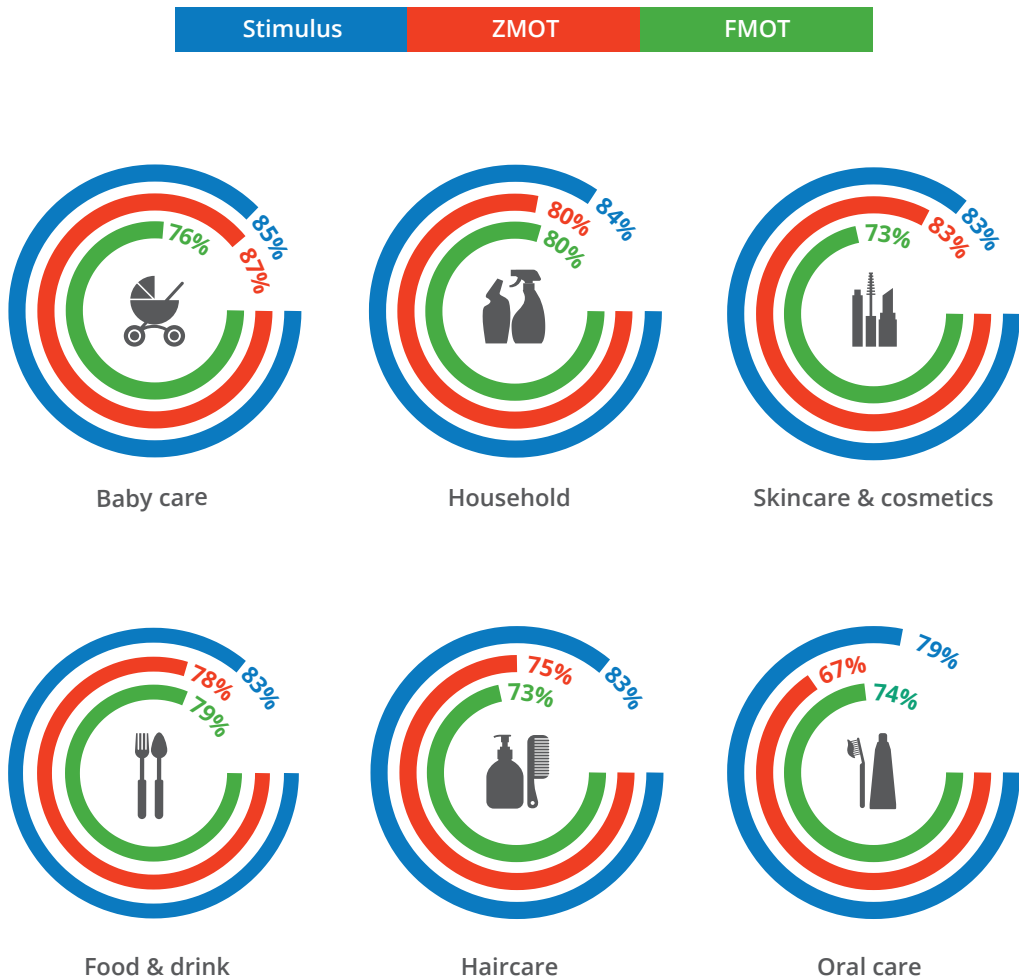
Doesn’t that seem rather simple? “I’m sorry, I can’t make it any more complex than that,” says James with a laugh. “It’s not rocket science.”

If ZMOT is going to be an equal thought, the budget has to be equal as well.



Let's go back to the TNS Female Shoppers Study.

Figure 5-2  
Relative importance of stimulus, ZMOT and FMOT category



Source: TNS Female Shoppers Study, Q4 2012. QD2b. "When you were considering purchasing the product, what sources of information did you seek out to help you with your decision?" Sources of information - Total (n= 8004).

This is what I mean about equal thought. Shoppers today use ZMOT sources right along with the classic stimulus and FMOT sources. None of the three are going away. The more information available, the more the shopper seeks. It's a self-perpetuating cycle.



You'd never set up a corporate telephone number with nobody to answer the phone. (Would you?) You wouldn't just let it ring.

The Internet is that phone number, and it's been set up for you even though you didn't ask for it. People are "calling" you with their web searches every minute of every day. If people search for your product and you don't answer that search, who do you think will answer?

That's why I ask people: Do you have a plan to win the Zero Moment of Truth that's at the same strong level as your stimulus, shelf and product plans? Have you looked at the new consumer journey end to end, and figured out how to win every day at ZMOT? Or is your plan to hope it turns out well for you? Because hope is not a plan!

Freddy Bharucha puts it very well:

*"Change is difficult and takes time. Most human beings prefer to stick to the low-risk 'tried and tested' comfort zone, but change requires risk-taking and courageous leadership. ZMOT change rewires the way we approach our marketing plans, content creation and even how we are structured internally and with our agency partners to win."*

Now let's talk about how to make that change happen.



# CHAPTER 6

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## HOW TO WIN AT ZMOT

*“The recent historical model for CPG has been: one, build a big brand, and two, distribute it. Marketing builds the brand, and then the sales teams do the distributing that leads to the sale.*

*But at ZMOT, marketers need to think much more expansively about their role: not just increasing brand awareness but taking a role in creating purchases.*

*100 years of marketing history suggests that we actually know this already and have just forgotten it. This idea wouldn't be a surprise to people 80 years ago if you went back and talked to them.”*

— Toby Desforges

Co-author, *The Shopper Marketing Revolution*

**I love that quote from Toby Desforges, because it really gets at the heart of how ZMOT is unifying consumer and shopper marketing.**

Here are four questions that will show you just where you stand at ZMOT right now:

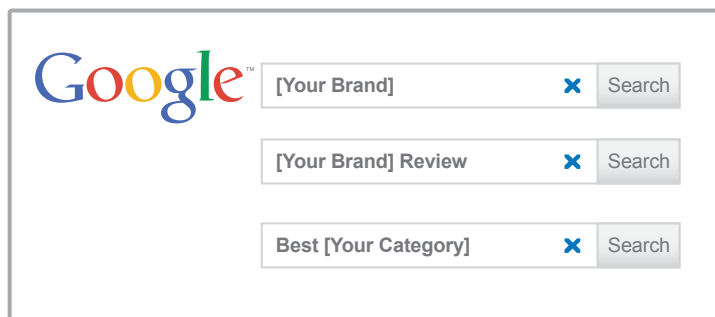
- When you start typing your product name into a search engine, but before you finish, what search terms fill in automatically below?

- Does your website or your message appear on the top third of the first results page for those searches?
- How does your brand appear on the key ratings and review sites for your category?
- If someone searches for key phrases from your TV ads, what do they see?

Now, one more thing. Try your brand name with these three searches:

**Figure 6-1**

### Search exercise



The results you see on these searches will show you where you need to begin.

### **Now let's talk about seven smart ways to start winning at ZMOT:**

1. Put Someone in Charge
2. Find Your Zero Moments
3. Answer the Questions People are Asking
4. Optimize for Mobile
5. Be Fast
6. Think Video
7. Be Brave

## **1. Put Someone in Charge**

Jim Lecinski always says that if he's talking about ZMOT with a CMO, this is the first question he asks: "Who's in charge of ZMOT for you?" Because if it's nobody's job, or if no senior managers are focused on it, it's not going to get done.

If I ask you, “Who runs your TV department?” or “Who’s in charge of your in-store marketing for shampoo?”, you’ll give me one person’s name. You also should be able to give me one person’s name for ZMOT.

Now, in your company you may want to make it part of everyone’s job — 20% or 40% of a lot of people’s roles instead of 100% of a few people’s roles. Whatever suits your culture. But these have to be people senior enough to really change your business, and to be held accountable.

If you’re the CMO, you can’t just say “I’m accountable” or dump it on your brand managers. You need ZMOT experts to put in place the strategy, processes, technology and people that will help your business thrive in this environment. You may want to bring in ZMOT veterans from other industries who’ve “got the T-shirt already,” as we say: people that know how to drive business criticality into your organization’s efforts and make each dollar deliver.

Ask yourself: Is this effort impacting my business? If not, then you’re probably not thinking big enough. This should feel like a major shift.

Ultimately, it’s about getting your brand always on and connecting with consumers when and how they want it, at any point of their journey. It’s about moving from mass communication to one-to-one relationships and about embracing eCommerce (and mCommerce).

And as you analyze the numbers and ask “What’s the ROI of appearing at ZMOT?”, don’t forget what Jim Lecinski calls the other ROI: the Risk Of Ignoring ZMOT. What is the cost of not being there? If you don’t appear when the beauty buyer in Japan is searching, you’ll never make that sale. But perhaps your competitor will.

It’s time to say yes to ZMOT.

## ***2. Find Your Zero Moments***

Do you know the Zero Moments of Truth for your product, category and brand... and for your target audience?

It’s not enough to say that people are searching for shampoo. Are they worried about dry hair or frizzy hair, are they looking for bargains or luxury, are they teens or adults? Each combination inspires its own ZMOT moment. Consider the journey of each consumer, look for clues through search and social media, and identify the sweet spots for your brand to own. If you’re a hair brand, and you learn that most consumer interest is in hairstyles (which it is!), then that’s a territory worth exploring. Or if your priority is to drive eCommerce, then focus on the journey around buying shampoo.

All search engines have tools that can show you relative search phrases around a topic and how popular each of those searches are. Google's is called the Keyword Tool, and it's free. Enter "Indian meals" and you'll see dozens of variations, from "Indian recipes" (33,000 searches a month) to international options like "chicken recipes" (90,500 searches a month) to related searches like soup or Chinese meal alternatives. Find the ones that are best for you: that's your ZMOT!

You can also type in the URL of your website and the tool will analyze the content on all of your website pages, look through all the search queries done by real users in the last 30 days, and suggest keywords that match your business.

The real ninjas of ZMOT grab those related searches and do fresh searches, creating growing circles of relative terms. This is a great challenge for the cleverest members of your team and your agencies — it takes both determination and art.

Know your brand's Zero Moments and you'll be on your way to winning at ZMOT.

### ***3. Answer the Questions People are Asking***

Here's a classic Zero Moment fail: a user searches for something like "what are the ingredients in dog food?" and gets back ads from pet food companies that say: "Get \$2.00 off our dog food!"

Now, who asked about money? Nobody! That user is on a journey for information.

What CPG brands need to ask is, simply: What is a consumer trying to do at this particular moment, and how can we help them do that, fast?

If they're an existing customer of yours, there's no need to waste money shouting your name at them; they're most likely looking for price or availability. How can you make that search easier for them? If they're on a mobile, can you signpost them to a retailer?

If they've seen a TV ad, then they've probably grabbed their phone to look for a bit more information about your product. We know that searches increase significantly on brand keywords when a TV ad runs. In China, it's common for TV ads to have a search box overlay on the ad to generate immediate engagement. They really get it!

Undecided consumers are actively evaluating: looking for the best, comparing A vs. B, and maybe even wanting to buy now. If a consumer has never tried your product, they may want to evaluate your brand against others. That's where you see searches like "best sun care products for kids,"



“Nivea vs. RoC” or “sunscreen reviews.” Or they may be searching for more general information: “Do waterproof sunscreens work?” There will even be people looking for how to make their own sunscreen with zinc oxide and beeswax.

You need to answer all these types of questions. Do you have a review engine on your site or a video that demonstrates the value of your product? Have you put ‘like’ or ‘+1’ buttons on your product pages to get your loyal consumers to endorse you?

How can you find out which questions people are asking? At Google we’d suggest the Real-Time Insights Finder. It’s a great tool that lets you monitor online attitudes, perceptions, activity and trends. In seconds you’ll find out what people are looking for, watching, and saying about your brand.

You’ll also see charts showing popular search trends for the last 24 hours, the last 30 days and beyond. If you’re a brand marketer, try entering your business name and see how it’s trending in the markets you care about. You can even keep tabs on competitors and see discussions on blogs.

**Figure 6-2**  
**Google Real-Time Insights Finder**

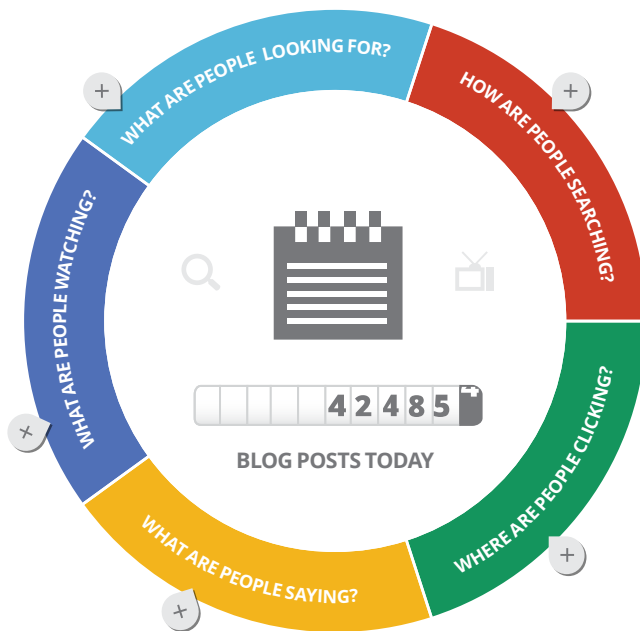


Figure 6-3

## What people are saying in blogs: Nivea

[Skin care products and advice for Men & Women | NIVEA UK - NIVEA](#)

[www.nivea.co.uk/](http://www.nivea.co.uk/) ▼

Get beauty care advice and discover the latest face care, body care, sun care and skin care products from NIVEA UK.

All results for **nivea** »

[Sweetaholic Beauty: Nivea In-Shower Body Lotion Skin Conditioner \\*](#)

[www.sweetaholic-beauty.com/.../nivea-in-shower-body-lotion-skin.htm](http://www.sweetaholic-beauty.com/.../nivea-in-shower-body-lotion-skin.htm) ▶

7 hours ago - **Nivea** has answered every lazy girl's prayers (oh, and let's not forget those lazy boys!) by creating my new favourite shower product ever; the **Nivea** In-Shower Body Lotion Skin Conditioner. Yes, it's exactly how it sounds - it's ...

More results from [www.sweetaholic-beauty.com](http://www.sweetaholic-beauty.com)

[Denise Van Outen Nivea Dare To Dip Pool Party Monochrome...](#)

[www.mydaily.co.uk/.../denise-van-outen-monochrome-minidress-nivea-...](http://www.mydaily.co.uk/.../denise-van-outen-monochrome-minidress-nivea-...) ▼

by MyDaily Staff

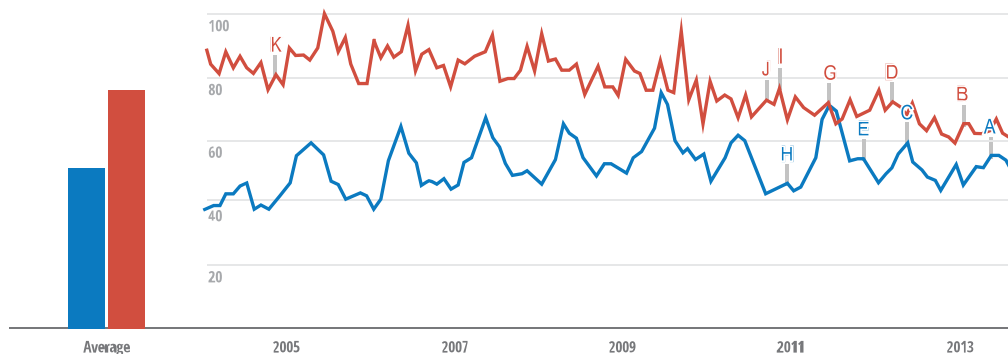
2 days ago - Denise Van Outen has recently suffered heartbreak after splitting with her husband of four years, Lee Mead. But has that left her sobbing in her PJs?

More results from [www.mydaily.co.uk](http://www.mydaily.co.uk)

Source: Real-Time Insights Finder: What people are saying on blogs - August 2013

Figure 6-4

## What people are searching for over time: 2-brand comparison



Source: Realtime Insights Finder: Google Trends - August 2013

Analytics tools like Google Analytics, WebTrends and Omniture come with standard built-in capabilities that will show if you're answering the right questions on your website. My Google colleague Avinash Kaushik is a big fan of what he calls "that delightful metric called bounce rate." It measures the percentage of people who see only one page of your site — people who arrive, look and leave.

If you're really helping the customer move forward on their journey, Avinash says, you should be seeing a bounce rate under 30%. That means only three out of 10 people you've brought to a given page leave instantly. A higher rate means you have a big gap between what people expect when they come to that page and what they find when they get there.

To win at ZMOT, narrow in and answer the questions people are asking.

## 4. Optimize for Mobile

"In Asia, all of ZMOT is about mobile," says Toby Desforges.

*"When I look at the way my Asian colleagues behave and the behaviors I see in stores, I don't see a lot of people flipping open their laptops any more. I just don't. But if you sit on a bus anywhere in Bangkok, you've got a half-hour period of time where people are absolutely engaged with their phones and tablets. When you're talking about how much time might be available to consumers in Asia, you're talking about mobile."*

The numbers bear him out. A third of all Android devices sold in 2012 were sold in China, and by 2017 we're forecasting 1.5 billion smart phones in Asia. <sup>1</sup>

In other words, Asia is a region where you really have to get mobile right.

Users on the go tend to be very task-based. They're less patient and more likely to be near the end of their buying journey. So be ready to answer questions about product availability, directions, operating hours and other I-need-it-right-now topics.

Here are some specific tips for mobile, based in part on data-gathering we've done in the past year:

- **First position matters even more.** That's true whether you're talking about search results or ad positions. On a 2x3" screen, if you're not at the top of search results you really miss out: a drop from first to fourth position can mean a CTR drop off of more than 90%. <sup>2</sup>

- **You can keep the same ad keywords.** Our studies show that right now, there's no big difference in the basic keywords used by mobile and non-mobile users.
- **Perfect your mobile site.** You *do* have a mobile site, right? Just because you can see your site on a smart phone doesn't mean it's easy to navigate and use. Try calling your site up on your own mobile device right now. Do you have to tap and pinch and zoom a lot? Make sure content is easily available in a format that suits a small screen and big fingers. And at the same time...
- **Don't replicate your whole website.** Do most visitors to your site want to look at product information? Or read reviews? Those items should be front and center on mobile. The more obscure details from your site should be dropped. Invoke the 80/20 rule: Deliver what 80% of consumers want most, and ignore the last 20%.
- **Give me a quality response fast.** As a mobile user, chances are good that I'm on a slower connection. That makes me less forgiving. If you send me down the wrong path, or I have to wait forever for the page to load, I'll give up.

## 5. *Be Fast*

In the world of ZMOT, agility beats perfection.

You can't go in with the classic mindset of a big annual marketing plan with roll-outs planned 12 months in advance. You have to be faster and more flexible than that.

Here's a nice example: The day that Lady Gaga released the video for her song "Telephone" a few years ago, Google saw a sudden surge in searches for terms like "Beyoncé yellow eye shadow" and "Beyoncé honey bee yellow makeup." Because two-thirds of the way through that nine-minute video, Beyoncé showed up in one scene wearing a yellow dress, yellow cowboy hat... and yellow eye shadow.

Now, if you sell eye shadow, would you like to be there when those searches are happening? I think you would. Before shoppers even walk down their store's cosmetics aisle, they're saying, "I want this look. Help me get it!" But you have to be ready to act fast and jump in with content those customers can find immediately.

As we were working on the new edition of this book, I experienced the much-talked-about "haze" which travels into Singapore during burning season in the nearby islands, which meant we all had to stay indoors for a few days. Here's what impressed me: within a few hours of the arrival of the haze,

Scot, one of the regional airlines, was running online campaigns encouraging people to get away to Perth or Phuket for some fresh air.

Ian McKee also reminds me how on the very first day of the haze, his client StarHub, the Singapore based triple-play telco, announced that as a goodwill gesture they would open up all the cable TV channels to subscribers for the weekend — for free! What's more, StarHub didn't do any advertising at all: they simply posted a status update on their social media pages. Naturally, the post was shared like mad and by evening, everyone knew they had free channels for the weekend. It was a hit.

By contrast, I was called by a CPG brand manager when the haze was already at its worst, wanting help to push a campaign live. Their intentions were good, but by the time their campaign did go live, the air had cleared!

There's a lot that CPG companies can learn from these agile younger brands. Having the process and people in place to move fast — as well as the mindset — is critical for ZMOT.

## 6. *Think Video*

Know what the second-most-used search box in the world is? It's the one on YouTube.<sup>3</sup>

You need to be ready and waiting with video for your customers, because a huge portion of ZMOT is visual now. Mobile phones can both show and capture video, after all. And you can communicate so much more in a 180-second tutorial than you can through pages of scrolling.

Video is one of the biggest interest areas now for the big brand advertisers I work with. Not only are they exploring how to go beyond a 30-second ad, but they're trying to figure out how to educate their consumers on how to use their products, with how-to tips and tricks and so on.

### **Brand consumers are often looking for two kinds of videos:**

- Product showcases and demos
- How-tos and expert advice

These kinds of videos can be big-budget productions or they can be simple one-on-one affairs with a team member (or you!) and a camera.

In Asia as in the rest of the world, we're seeing the rise of online gurus in all lifestyle areas: fashion, beauty, haircare, cooking, homecare, you name it. These celebrities have a massive following: take

Michelle Phan with her 4M subscribers and over 700M views, or Binosusume's amazing hair channel in Japan, which has over 100M views and counting.

These opinion leaders can give brands a voice and a level of authenticity that traditional TV ads just can't deliver. Michelle Phan is so popular that she's been tapped up by L'Oréal Luxe to launch her own-brand cosmetics range, "EM".<sup>4</sup>

L'Oréal has also done amazing work in the area of fast-response web videos for their audiences. When they first heard about the ombré hair look (you recall the two-tone hair, with the lower locks dyed differently from the top), L'Oréal quickly created videos on how to use their products to create the look at home. These videos were easily found, widely shared, and L'Oréal owned this ZMOT trend.

That's one other big advantage video has: the "look at this!" factor. Video is wonderfully easy to find through search, share through email, post to social networks, or embed on blogs and web pages. It's just a great way to showcase your product.

## 7. Be Brave

The beauty of the online world is this: You can jump right in. And the beauty of ZMOT is that the best way to succeed is to jump right in. You don't need a committee and you don't need a five-year plan. You just need someone in charge with the knowledge that it can be a huge win for your business, plus a willingness to be daring, have fun and try new things.

The businesses who do well at ZMOT are the ones that "fail faster," as Avinash Kaushik likes to put it. Because the faster you fail, the faster you learn what works. Treat your online marketing campaigns as if they're always in beta: test, measure, then iterate all over again.

"Retail tends to operate based on rules and principles," says James Mounter. "But in digital, those fundamental rules and principles don't exist yet." So when you put people in charge of the ZMOT experience for your brand, make sure they're the kind of self-starters who like to attack a problem and take risks. And make sure you give them the power and freedom to jump in and act right away.

"Online marketing offers room for infinite opportunity and infinite creativity," says Toby Desforges. "An idea can be tested, taken down and then put up again. In 10 years' time, people will look back at us and say, 'Those companies that thrived were ready to embrace test and trial, and they grew based on test and trial.'"

## *One More Thought*

That makes seven steps, some simple and some a little more complex. Follow them all and you'll be well on your way to success at ZMOT.

Now I have a challenge for you: Over the next couple days, pay attention to your own buying decisions and research as a consumer. How do you make your choices? Bet you'll be surprised how often you find yourself at ZMOT. While you're there, think about how your own customers will be looking for you in the same ways.

**Now jump in!**





# CHAPTER 7

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## WHAT'S NEXT FOR ASIA

*“What would I tell a CMO today? Be very scared and be very excited. Scared because the old model you’re used to working with is cracking and breaking in front of your eyes, and unless you change now, you’ll be left behind.*

*But be excited because everyone else is still moving really slowly, and if you’re the first mover to make that transition, you have a huge opportunity ahead of you. There’s everything to lose and everything to gain. Because there is such a revolution coming.”*

— Ian McKee  
CEO  
Vöcanic

### **What an exciting time to be a marketer in Asia.**

One of the questions I often get asked by CPG leaders in Asia is: where do I see things going in the next 5 years, and what should we be planning for now? I see three big changes that brand marketers should be preparing for.

## 1. Mobile will become the first screen

The cell phone is the new car: the 21st-century symbol of aspiration, accomplishment and freedom. The only thing that's really standing in the way of ubiquitous freedom in this region — in tier 3, 4 and 5 cities — is broadband access, and I predict that this barrier will be removed in the next 3 to 5 years.

Earlier this year, Google announced Project Loon, an effort to provide global Internet access through a network of high-altitude balloons. These huge solar-powered balloons would float 20km in the sky, well clear of the weather (and airplanes, too) and communicate with ground stations to provide cost-effective, reliable access to the 5 billion people in the world who don't have Internet access yet.

Is Loon going to work? We don't know yet. It's definitely a wild idea. But if not Loon, something else will come along soon enough. And when that broadband access kicks in, those hundreds of millions of consumers will be jumping on the Internet for the first time, from rural towns and places that brands couldn't historically reach easily. All of that access will be on a smart phone.

This change will be particularly acute for CPG brands trying to reach female consumers. Nihar Das says it this way: *mobile comes to the rescue*.

*"As society is becoming time-compressed, the woman in the household still has to get up very early in the morning to prepare the household chores, get the kids to school, get things ready for the husband to leave for work... and then she herself leaves for work.*

*Now, when she comes home, the same routine pretty much continues: preparing food for the family, putting the kids to bed, doing things for the husband or in-laws, before she finally gets a little time to herself before retiring to the bed.*

*In that compressed bit of time for her, the old behavior of actually leaning back and watching television is losing ground. And what's happening in its place is, her lean-back behavior has been transported into her little portable mobile device.*

*So while she's waiting for the transport to arrive, while she's in the office and has a little break, she takes her lean-back time then. She uses the time to go to social pages, to catch up with a friend and see how her kids have grown up, and so forth. That earlier hour of sitting down in front of TV now is broken into small bite-size times and fit into her time-compressed day and life.*

*There is no other platform, no other device that comes to her rescue like mobile."*

Are you ready to come to the rescue of this consumer in her time-compressed day? Are you thinking about how you can win her on the first screen — how you can make her life easier, help her make smarter decisions, save her time and money?

Search is an active mindset, as Rowena Millward pointed out, and when you're mobile you can make decisions and act on them anywhere you like. That's going to turn mobile devices into retention platforms and loyalty platforms. Smart marketers are going to offer time-based coupons to encourage shoppers to act — like a QR code at a bus stop that gives a shopper 15% off if she buys in the next 60 minutes.

And as consumers grab these deals and unlock information of their own, they'll add their own data and opinions to the conversation on their own sites and blogs, on social networks and on new features no one has imagined yet. Mobile phones are ZMOT machines.

Few CPG brands have managed to tackle this challenge successfully in Asia, so we can take some inspiration from our western colleagues. I like the way the dog food brand Beneful created a dog lover's map that not only gives you tips on how to look after your dog but where to take your dog for a walk, as recommended by other dog lovers. And Sephora has revolutionized loyalty for beauty consumers with a mobile site that lets you access your account on the go and review, reserve and repurchase your favorite beauty products.

Whether it means connecting a new mum to other mums on how to get through the first 6 weeks after giving birth, helping a dad entertain his kids during a family holiday over Chinese New Year, or saving time for a busy mum through a mobile home delivery app, brands that figure out how to delight their consumers at mobile ZMOT will have huge competitive advantage.

## 2. eCommerce will flex its muscle

*"It used to be that retail was all about hypermarkets. Almost every year we'd see more shopping time, we'd see people reducing their number of trips and increasing their spend per trip. That was the global trend until about 2006.*

*But with digital, that shopper behavior is now massively compressed. It's a dramatic move to more impulse-based shopping trips. Moms are shopping faster, they're going to more stores, they're spending less in those stores, and they're using mobile to make it happen.*

*When you take it to its raw extreme, it's 15 seconds from consideration to purchase on mobile or online. It's like a blurring of where shopping happens."*

- James Mounter

I said earlier that the sales funnel is turning into something less linear and more like a multi-way zigzag of impulses. Those impulses are also firing faster and faster. For consumers, the Zero, First and Second Moments of Truth are growing closer by the minute. Ultimately, the store is coming to the consumers — whether it's the virtual moment James mentions, or a pop-up store at a trendy coffee shop on Garosu-gil Street in Seoul, where women can get their skin tested as they sip a latte... and tweet about it to their friends.

If Taobao, the leading eRetail site in China, is anything to go by (it accounts for 70% of the country's 29 million parcels delivered daily, and its parent company, Alibaba, handles annual merchandise equal to 2% of China's GDP), CPG shopping will be revolutionized in the next 5 years. <sup>1</sup> Rowena Millward told me this about the Taobao phenomenon:

*"I was in the China office of a media partner the other day, and while I was there they had four different Taobao deliveries for people in that office. And I was only at reception for about 15 minutes.*

*This kind of shopping is transformational. The accessibility and the value proposition and the convenience are all there. Then it becomes an established behavior that people don't think about — they just do it."*

So this trend is well underway. "The reality is that we have huge opportunities on many of our brands," says Freddy Bharucha of Procter & Gamble. "In many cases, our eCommerce shares are stronger than in brick and mortar stores."

We saw in our research that as many as 30% of certain CPG purchases — beauty and baby care — are already being performed online. Toby Desforges' forecast that 20% of grocery purchases will be online by 2020 may not seem as lofty as we originally thought. Virtual stores will start to substitute for brick-and-mortar stores, and service in the form of home delivery will change the way we buy many low-involvement items. We're seeing the lines between FMOT, ZMOT and SMOT blurring.

Of course there will always be occasions when we'll want to handpick our groceries, enjoy the fresh aircon of shopping malls away from the beige walls of our offices, and savor the ritual of trying new skin products with the gentle guidance of a beauty consultant. But I do believe that the

Taobao effect will gather momentum and make the path to purchase a far slicker, faster and more rewarding experience.

This has already happened in many aspects of our shopping. Today we can plan a Diwali dinner online: research recipes (ZMOT), buy the ingredients (FMOT) and repost our pictures and 'thumbs ups' so others can see them (SMOT). All before we even eat a mouthful.

### **3. Brand and shopper marketing teams will come together**

For CPG organizations, there's no longer a clear line between consumer marketing and shopper marketing. Many brands I talk to have kept a "Great Wall" between the two, but in digital it's all the same consumer, all at once. And that means that the consumer and shopper teams need to come together.

James Mounter is seeing this kind of thinking already in Johnson & Johnson:

*"Big brands can spend just an insane amount of money on those large pieces of plastic, promotions, giveaways, all the usual stuff you see in a store. And yet it's actually more efficient to go to a retailer or drug store and say, 'Let's take that investment and move it to the Zero Moment of Truth to influence the shopper to have a more guaranteed closed sale.'*

*This is an opportunity to reframe that overheated in-store environment and reschedule where our investment is."*

This questions the very heart of the way we've all been working. Brand marketing would send the consumer down that famous funnel, but the buying relationship was still held by the retailer. As soon as the customer got into the store, the brands lost control.

Who owns that customer relationship today? In the online world, brands can actually afford to have that relationship and to work with the retailers in the same space and the same moments to make both brand and shopper marketing work even harder for them.

What I see happening is smarter business decisions being made by the coming together of the brand and shopper marketing teams. Real-time data, consumer input, and the clear sense of context that ZMOT provides will lead us to much better use of budgets.

If we make it happen, that is. It's not something that's going to be figured out overnight, but this is where we're headed.

## *A Final Thought*

Do you remember my search for skin cream that started in the taxi in Tokyo? Now let me tell you the rest of that story.

I did buy SK-II from the duty-free shop on my plane back to Singapore. Once I got it home that night, I ripped off the wrapping, went through the ritual unboxing, and... discovered that the directions were completely in Japanese.

I thought, "Oh my goodness, how do I use this? Do I use my fingertips or a wipe? At night, in the morning?" I didn't want to waste any of this product that I'd paid for like liquid gold.

So naturally, I went back online. First I found a wonderful how-to-use-it video. And then I searched for instructions in English and ended up finding discussion groups with some very nice tips for using it with my type of skin. And then I stood in front of the mirror, washed my face and hands, and put the advice to practice using the tips of my fingers.

ZMOT can be that simple for all of us. All you need to do now is get your business into the conversation.

Ask your team the question that we at Google ask clients every day: "Are you ready to win at the Zero Moment of Truth?"

*For over 150 years, the purpose of advertising was to draw customers into the store so that they can touch and feel the product in order to close the sale. However, with digital, brands can engage with customers in incredibly immersive ways long before they decide to enter a store. Creating these digital experiences will be the key to success for brands in the future.*

— Simon Kahn  
Chief Marketing Officer  
Google Asia Pacific





# KEEP IT GOING

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## *Ready for more?*

Join us in the Zero Moment of Truth community at Think With Google ([google.com/think](https://google.com/think)). We're tracking the latest buzz and new ideas from reporters, retailers, bloggers and marketers of all kinds. It's a one-stop shop for Zero Moment news and fresh perspectives.



# APPENDIX

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For ZMOT data lovers: This appendix offers supplemental data on the TNS Female Shoppers Study, conducted in Asia and published in October 2012.

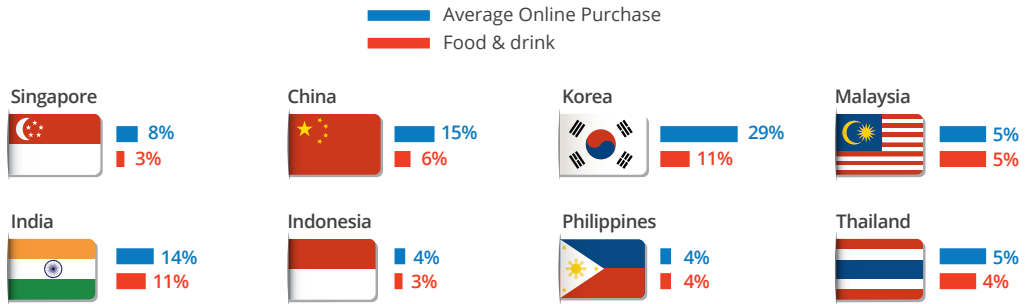
**Study Objectives:** To determine on a macro and industry level how shoppers and consumers make decisions, by understanding three core components: 1) The average length of the decision-making purchase cycle; 2) the sources used to make final decisions; and 3) the influence each source had in those final decisions.

**Methodology:** TNS used an online survey to collect data from 8062 consumers with Internet access. A quantitative analysis of decision-making behavior was conducted across 8 countries: South Korea, Singapore, China, the Philippines, Indonesia, India, Thailand and Malaysia. Data was collected across 6 categories: food & drink, skincare & cosmetics, haircare, oral care, baby care and household products. Highlights are listed by category below.

## Food & drink

Figure 1a

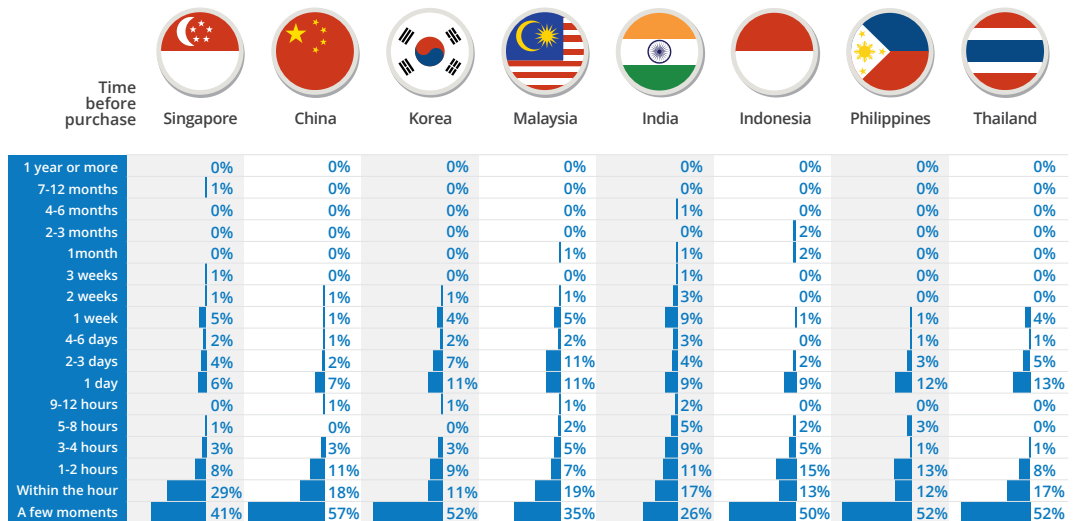
### Percentage of purchases made online



QD2: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Food & drink base: Total (n=1935), Singapore (n=167), China (n=167), Korea (n=167), Malaysia (n=164), India (n=177), Indonesia (n=170), Philippines (n=168), Thailand (n=169)

Figure 1b

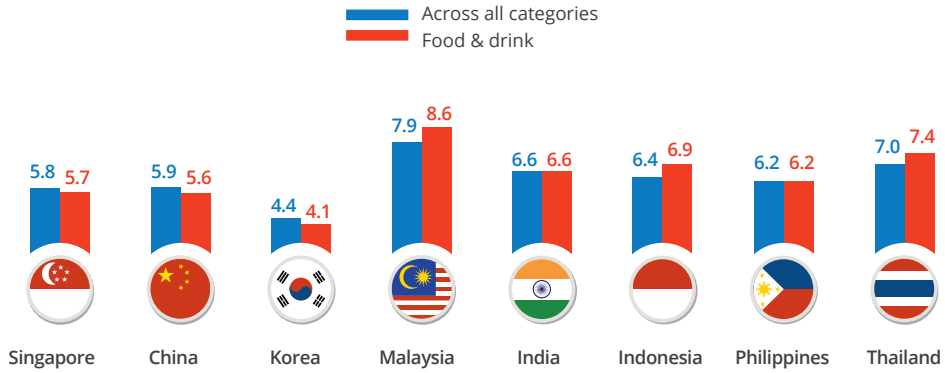
### Time spent planning last purchase



QD2a: "In total how long were you thinking about buying this [CPG PRODUCT] before you actually purchased it?" Food & drink base: Total (n=1935)

Figure 1c

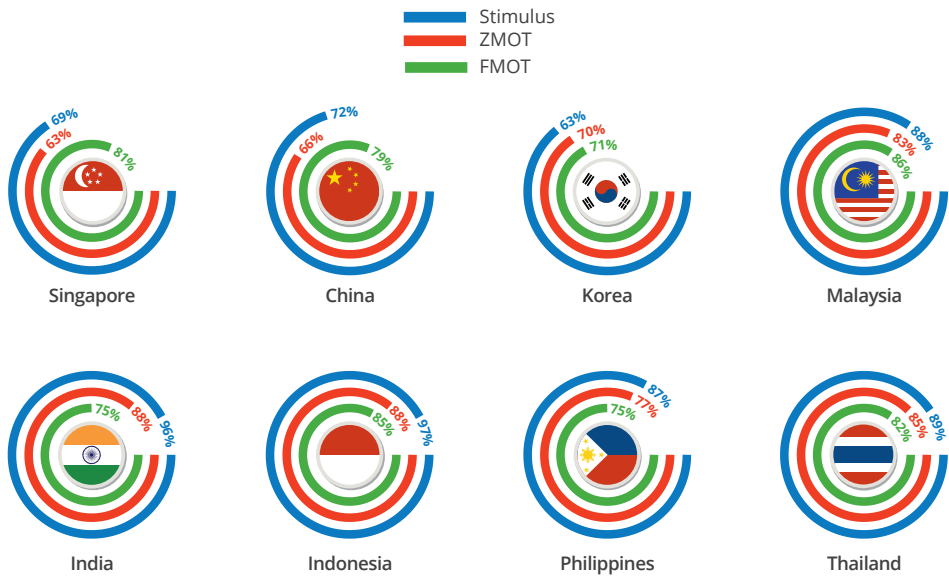
### Average number of sources used



QD2j: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Food & drink base: Total (n=1935)

Figure 1d

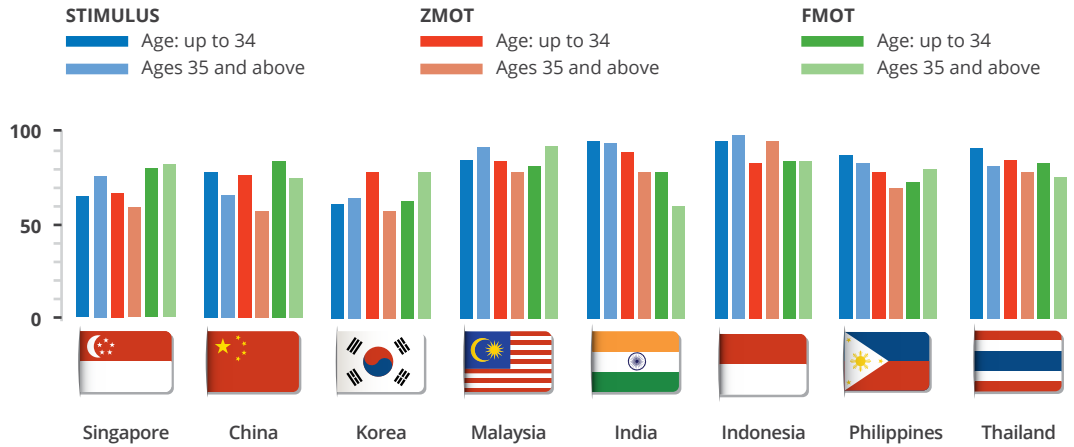
### Use of different categories of information sources



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Skincare & cosmetics. Total (n=1935)

Figure 1e

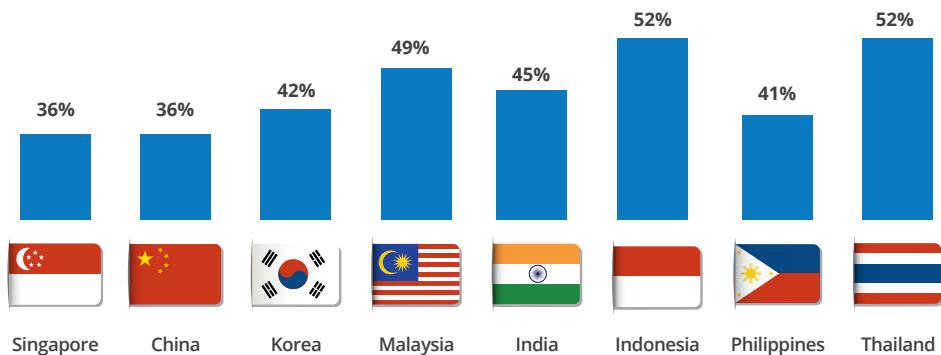
### Use of category of information source for last purchase, by age



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Skincare & cosmetics base: Total (n=1935)

Figure 1f

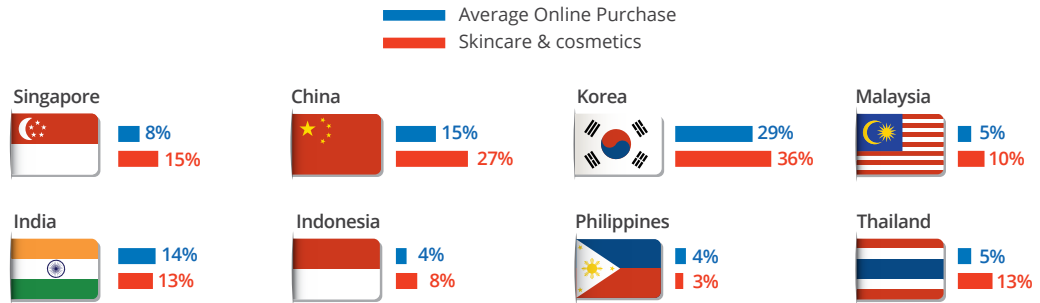
### Use of search in food and drink purchase



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Skincare & cosmetics base: Total (n=1935)

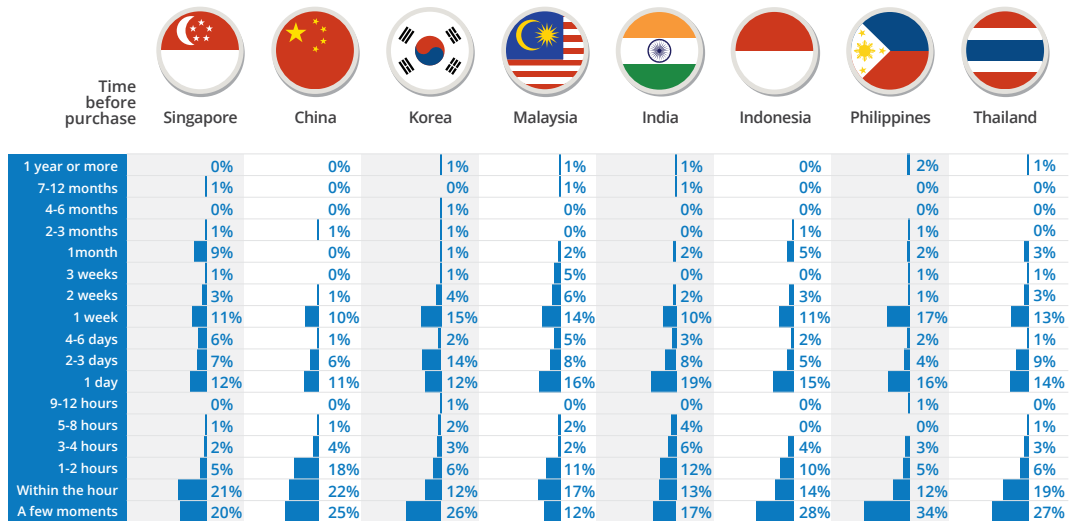
## Skincare & cosmetics

Figure 1a  
Percentage of purchases made online



QD2j: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Skincare & cosmetics base: Total (n=1935), Singapore (n=167), China (n=167), Korea (n=167), Malaysia (n=164), India (n=177), Indonesia (n=170), Philippines (n=168), Thailand (n=169)

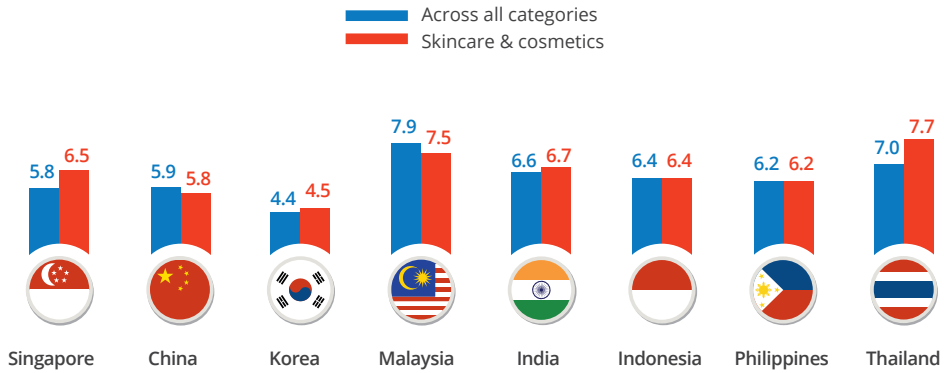
Figure 1b  
Time spent planning last purchase



QD2a: "In total how long were you thinking about buying this [CPG PRODUCT] before you actually purchased it?" Skincare & cosmetics base: Total (n=1935)

Figure 1c

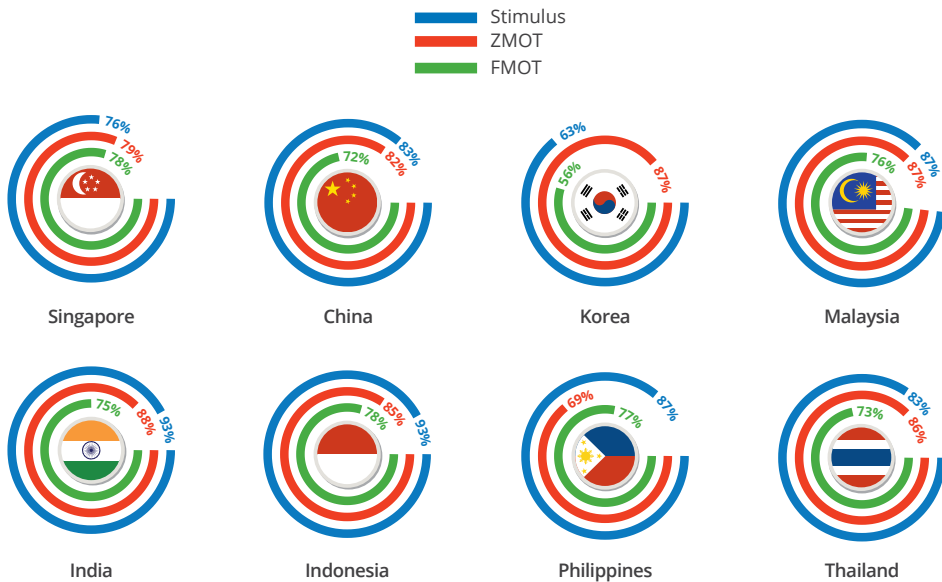
### Average number of sources used



QD2j: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Skincare & cosmetics base: Total (n=1935)

Figure 1d

### Use of different categories of information sources

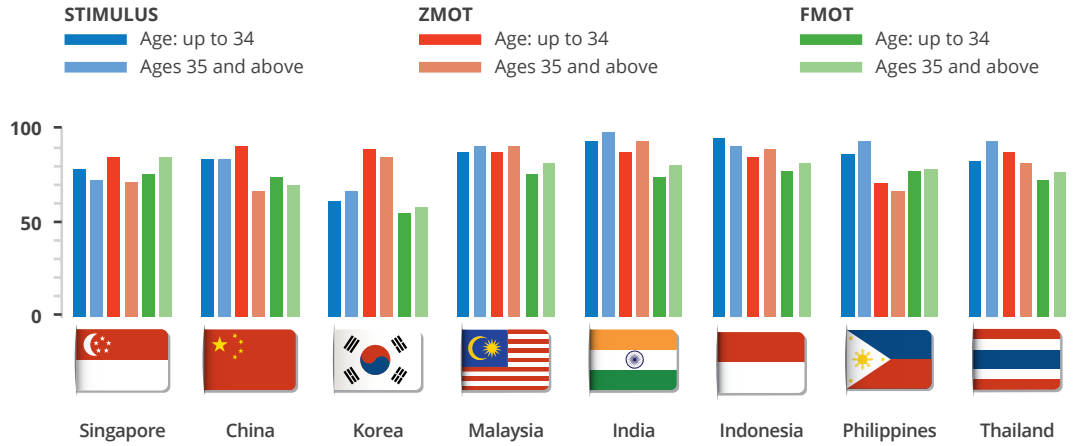


QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Skincare & cosmetics. Total (n=1935)



Figure 1e

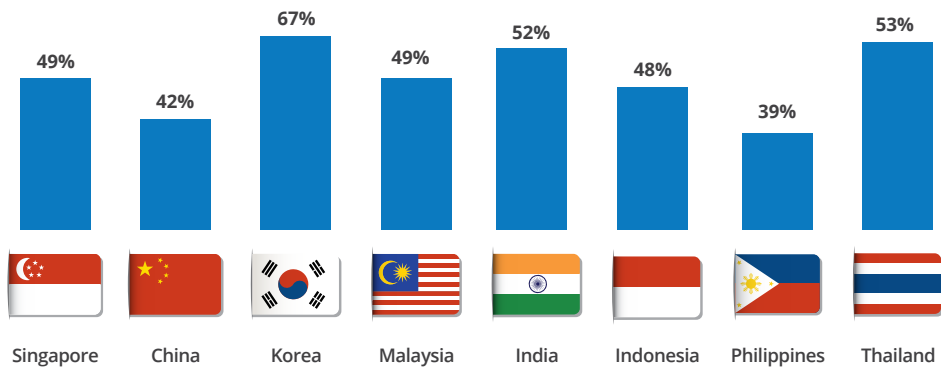
### Use of category of information source for last purchase, by age



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Skincare & cosmetics base: Total (n=1935)

Figure 1f

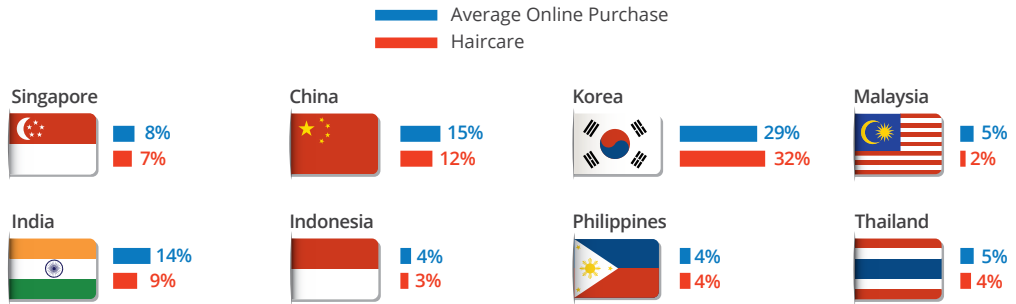
### Use of search in skincare & cosmetics purchase



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Skincare & cosmetics base: Total (n=1935)

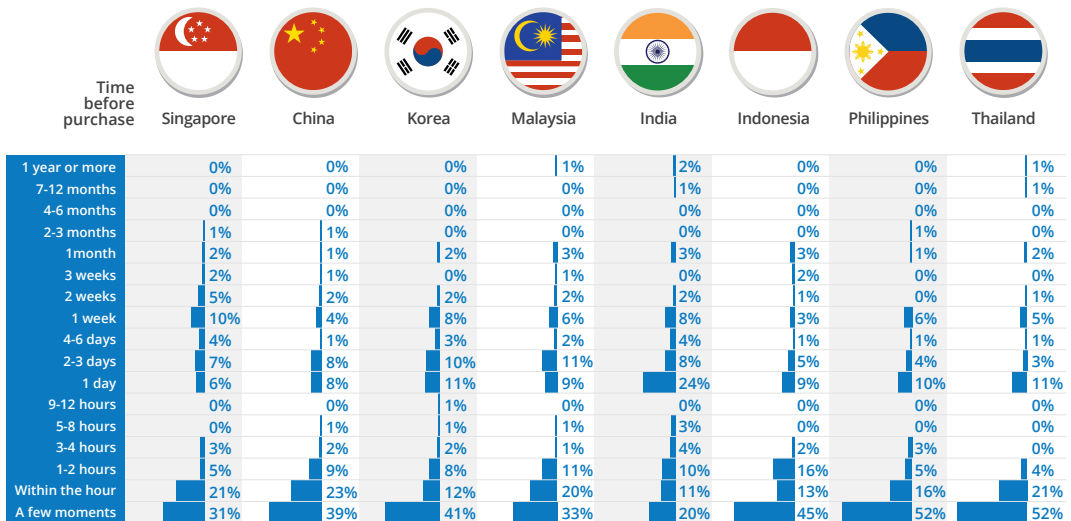
## Haircare

Figure 1a  
Percentage of purchases made online



QD2: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Haircare base: Total (n=1935), Singapore (n=167), China (n=167), Korea (n=167), Malaysia (n=164), India (n=177), Indonesia (n=170), Philippines (n=168), Thailand (n=169)

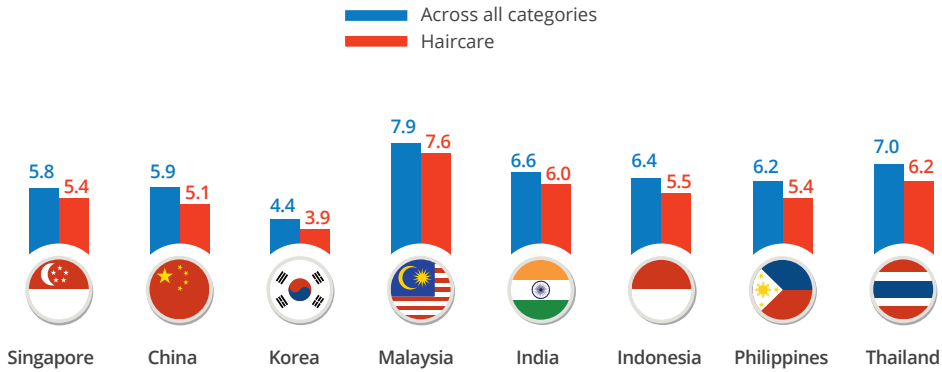
Figure 1b  
Time spent planning last purchase



QD2a: "In total how long were you thinking about buying this [CPG PRODUCT] before you actually purchased it?" Haircare base: Total (n=1935)

Figure 1c

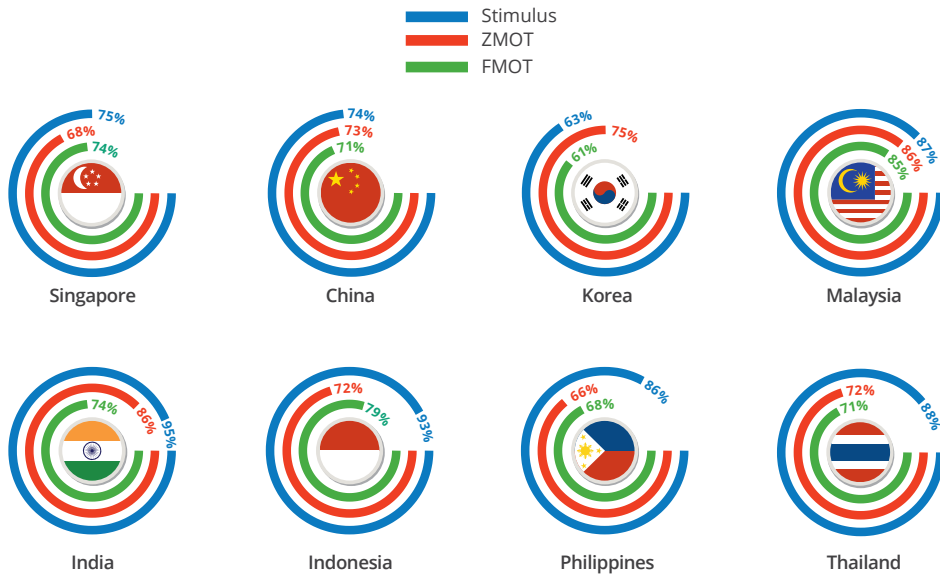
### Average number of sources used



QD2j: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Haircare base: Total (n=1935)

Figure 1d

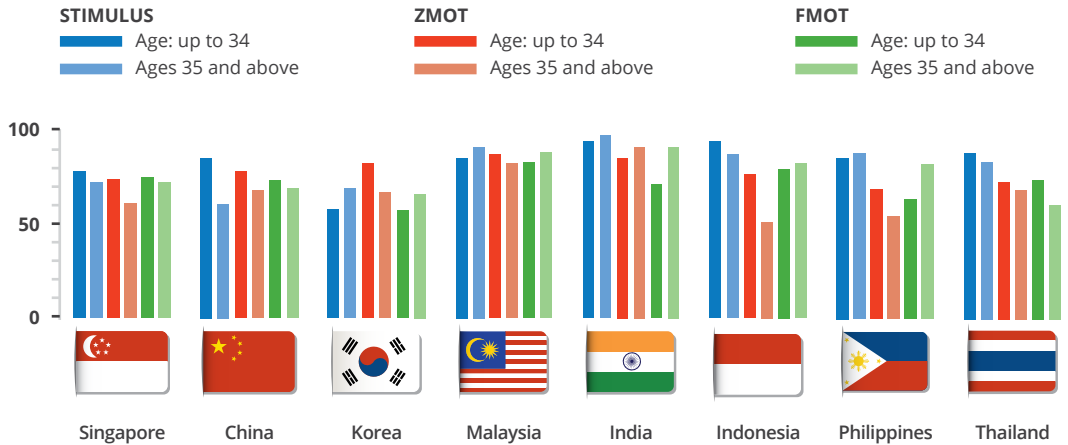
### Use of different categories of information sources



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Haircare base: Total (n=1935)

Figure 1e

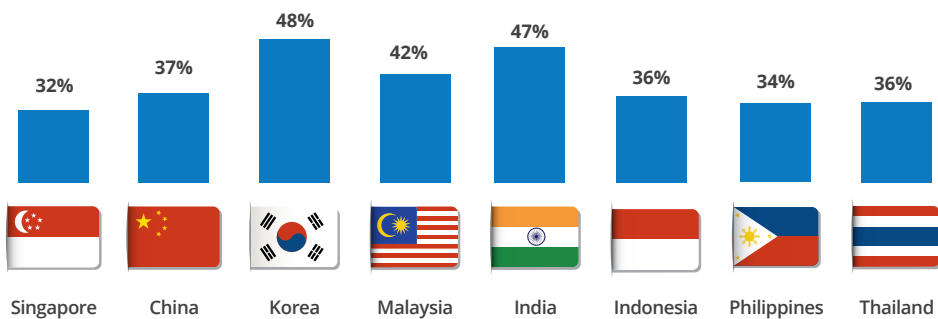
### Use of category of information source for last purchase, by age



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Haircare base: Total (n=1935)

Figure 1f

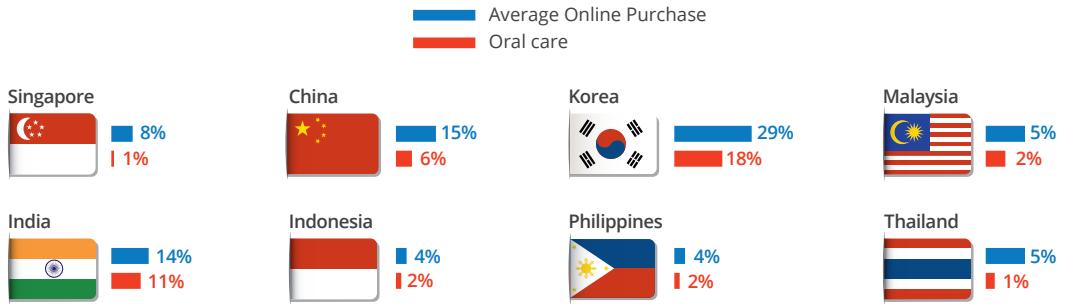
### Use of search in haircare purchase



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Haircare base: Total (n=1935)

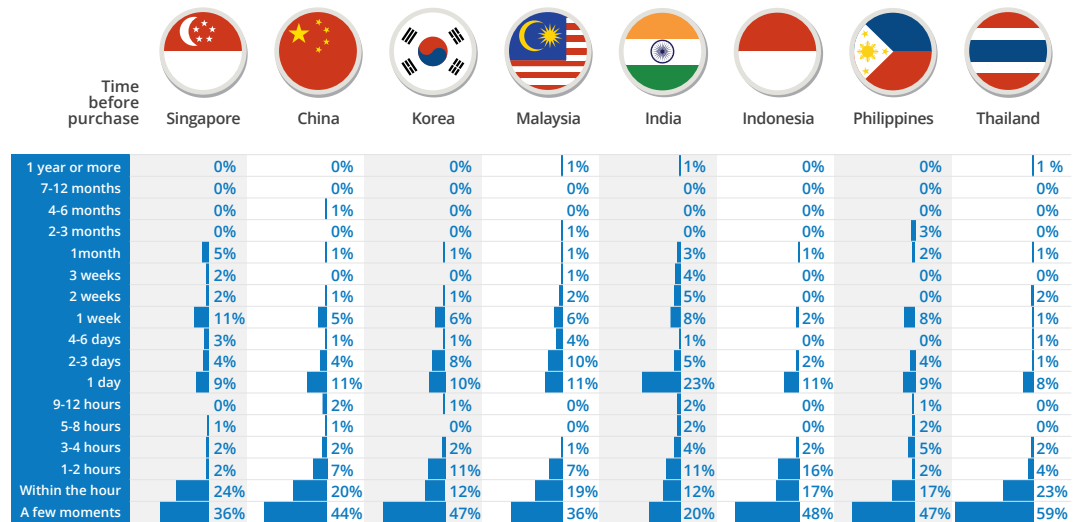
## Oral care

Figure 1a  
Percentage of purchases made online



QD2]: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Oral care base: Total (n=1935), Singapore (n=167), China (n=167), Korea (n=167), Malaysia (n=164), India (n=177), Indonesia (n=170), Philippines (n=168), Thailand (n=169)

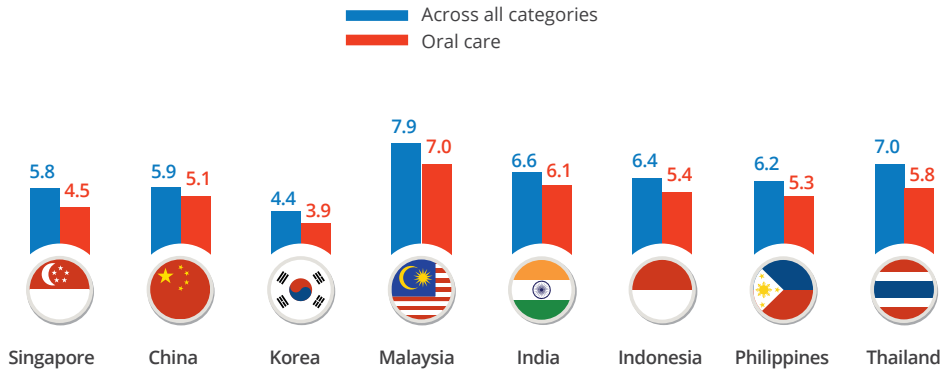
Figure 1b  
Time spent planning last purchase



QD2a: "In total how long were you thinking about buying this [CPG PRODUCT] before you actually purchased it?" Oral care base: Total (n=1935)

Figure 1c

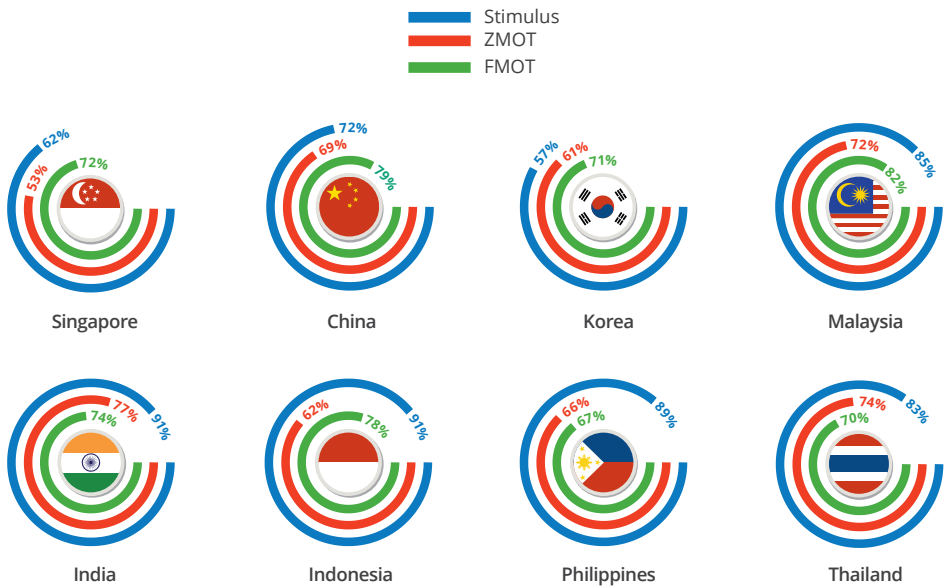
### Average number of sources used



QD2]: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Oral care base: Total (n=1935)

Figure 1d

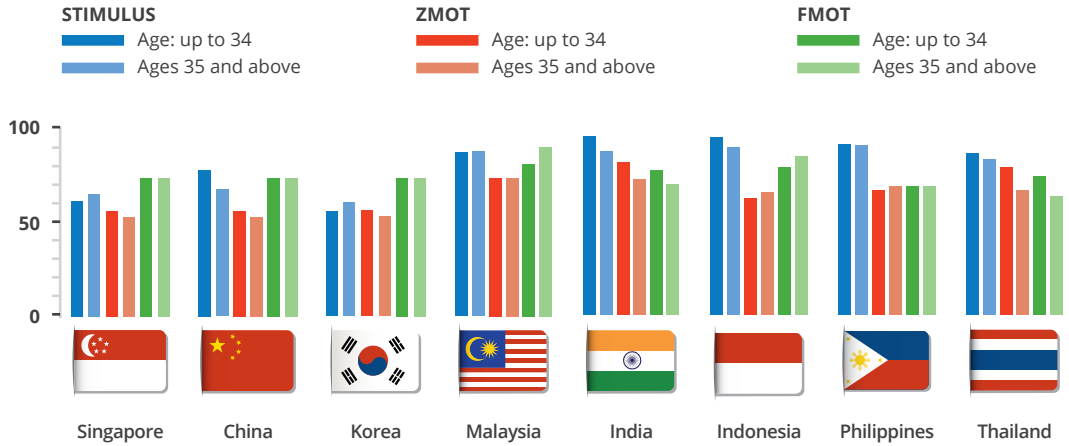
### Use of different categories of information sources



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Oral care base: Total (n=1935)

Figure 1e

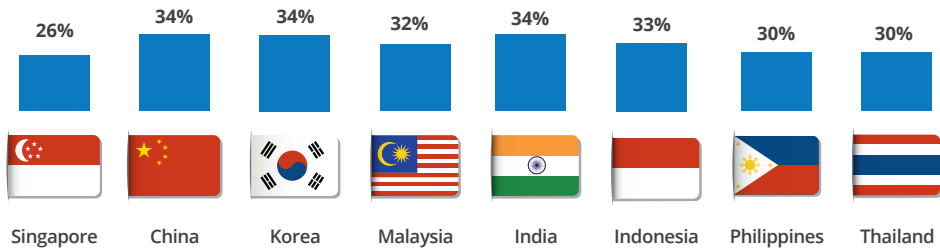
### Use of category of information source for last purchase, by age



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Oral care base: Total (n=1935)

Figure 1f

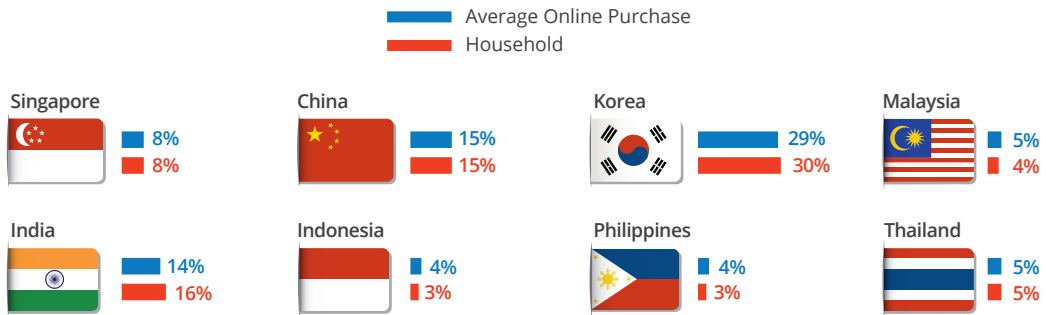
### Use of search in oral care purchase



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Oral care base: Total (n=1935)

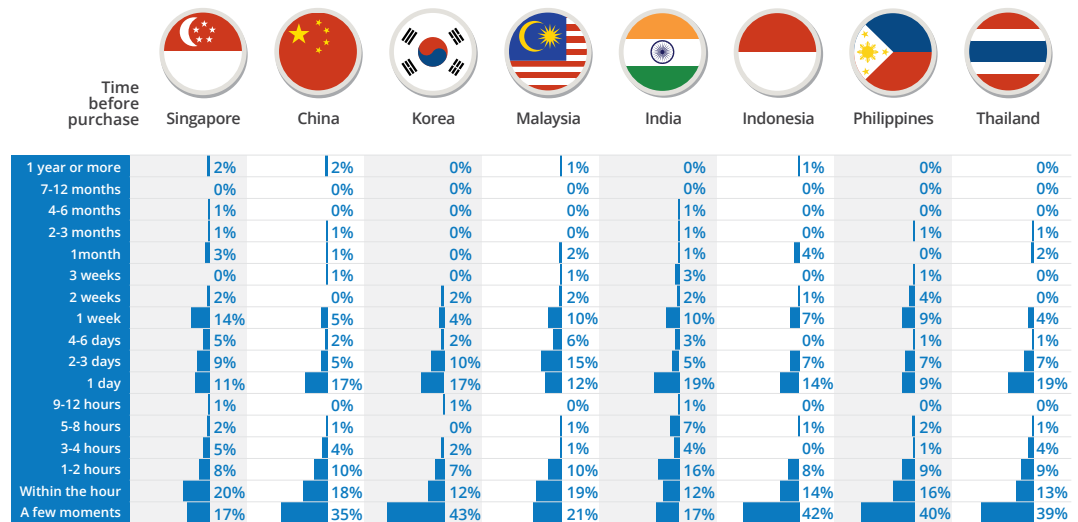
## Household

Figure 1a  
Percentage of purchases made online



QD2j: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Household product base: Total (n=1935), Singapore (n=167), China (n=167), Korea (n=167), Malaysia (n=164), India (n=177), Indonesia (n=170), Philippines (n=168), Thailand (n=169)

Figure 1b  
Time spent planning last purchase

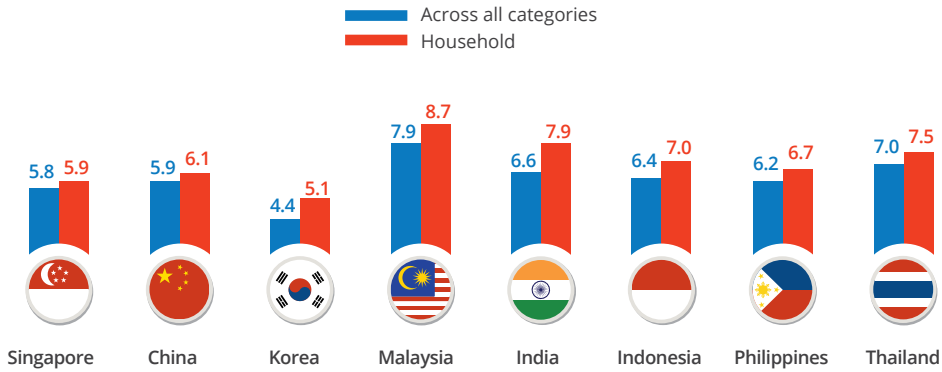


QD2a: "In total how long were you thinking about buying this [CPG PRODUCT] before you actually purchased it?" Household product base: Total (n=1935)



Figure 1c

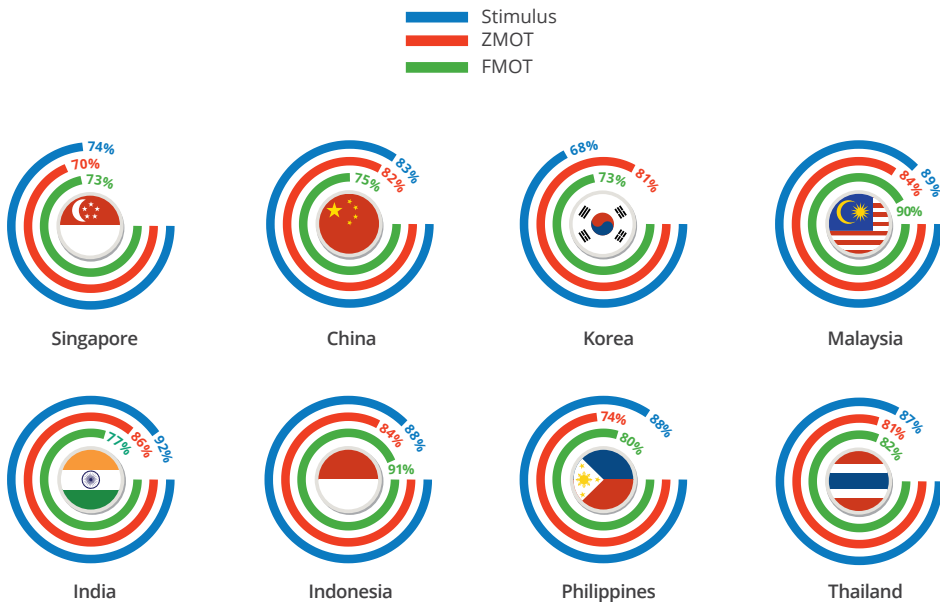
### Average number of sources used



QD2j: "On the last occasion, where did you purchase this [CPG PRODUCT]?" Average online purchase. Household product base: Total (n=1935)

Figure 1d

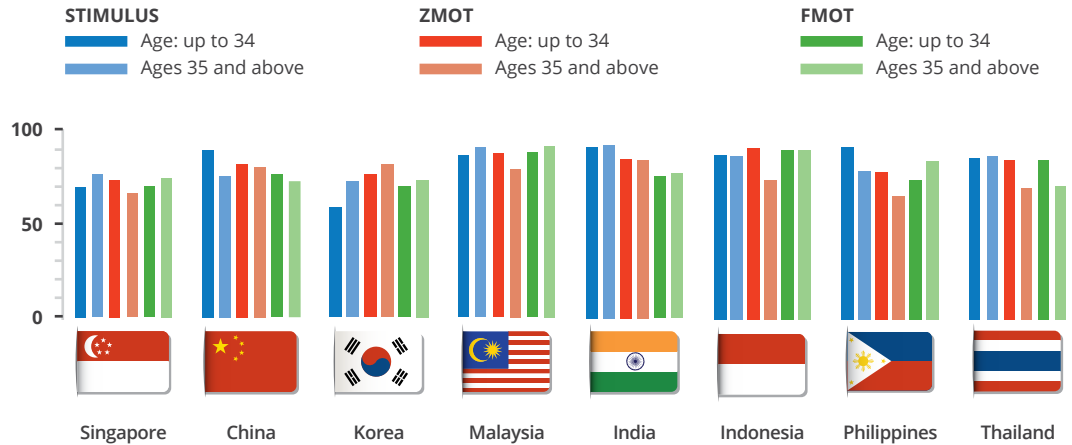
### Use of different categories of information sources



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Household product base: Total (n=1935)

Figure 1e

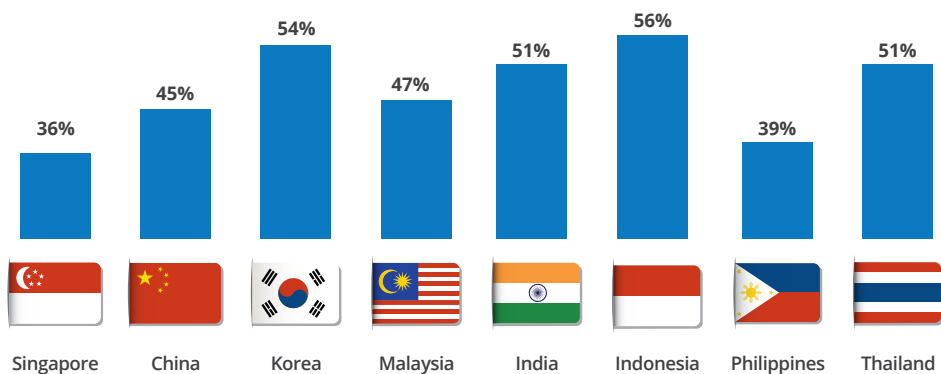
### Use of category of information source for last purchase, by age



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Household product base: Total (n=1935)

Figure 1f

### Use of search in household product purchase

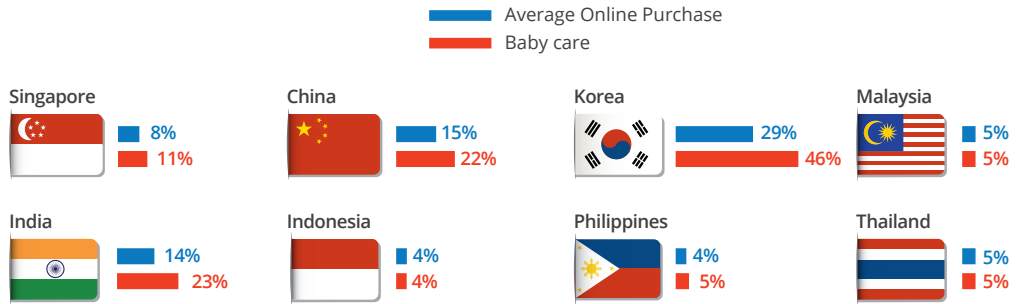


QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Household product base: Total (n=1935)

## Baby care

Figure 1a

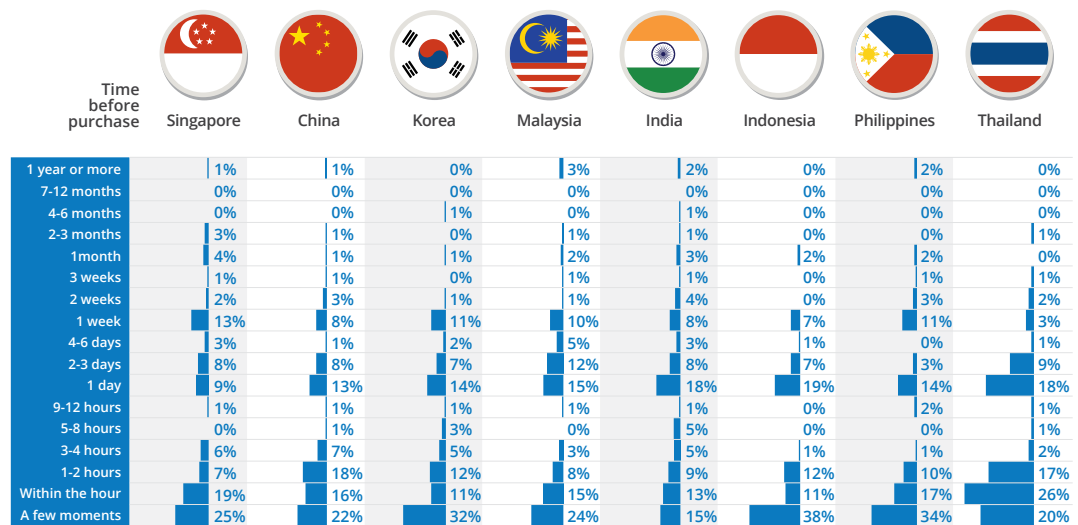
### Percentage of purchases made online



QD2: On the last occasion, where did you purchase this [CPG PRODUCT]? Average online purchase Base: Total (n=8062), Singapore (n=1000), China (n = 1000), Korea (n=1004), Malaysia (n=1004), India (n=1004), Indonesia (n=1017), Philippines (n=1017), Thailand (n=1016)

Figure 1b

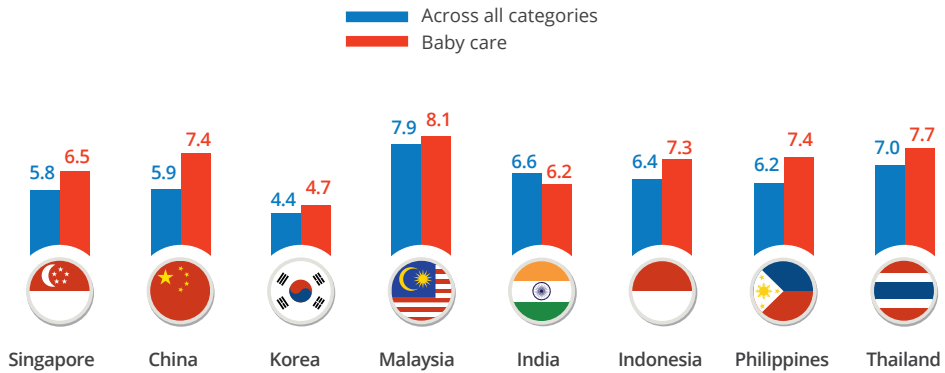
### Time spent planning last purchase



QD2a: In total how long were you thinking about buying this [CPG PRODUCT],before you actually purchased it? Base: Total (n=1372), Singapore (n=167), China (n=164), Korea (n=170), Malaysia (n=173), India (n=184), Indonesia (n=171), Philippines (n=170), Thailand (n=173)

Figure 1c

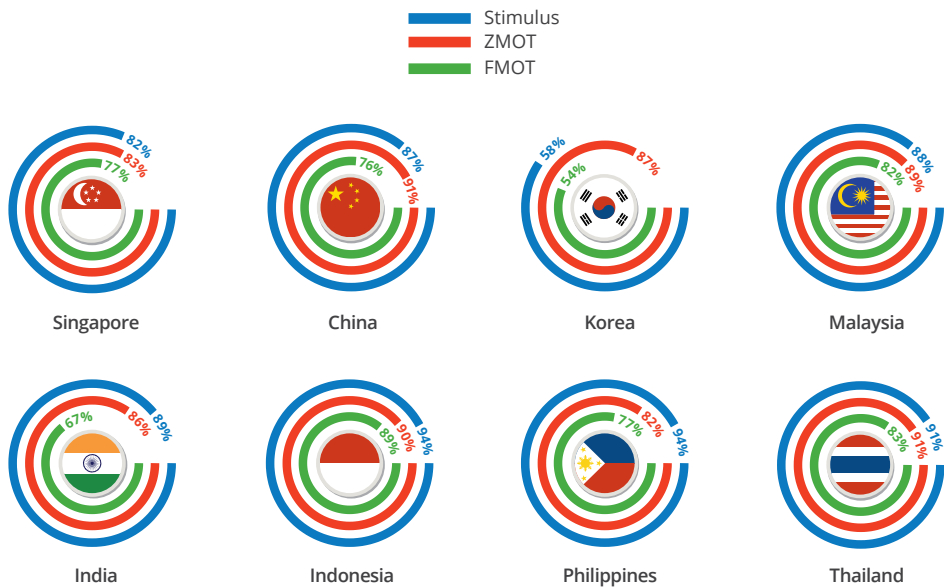
### Average number of sources used



QD2b: When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision? Base: Total (n=1372), Singapore (n=167), China (n=164), Korea (n=170), Malaysia (n=173), India (n=184), Indonesia (n=171), Philippines (n=170), Thailand (n=173)

Figure 1d

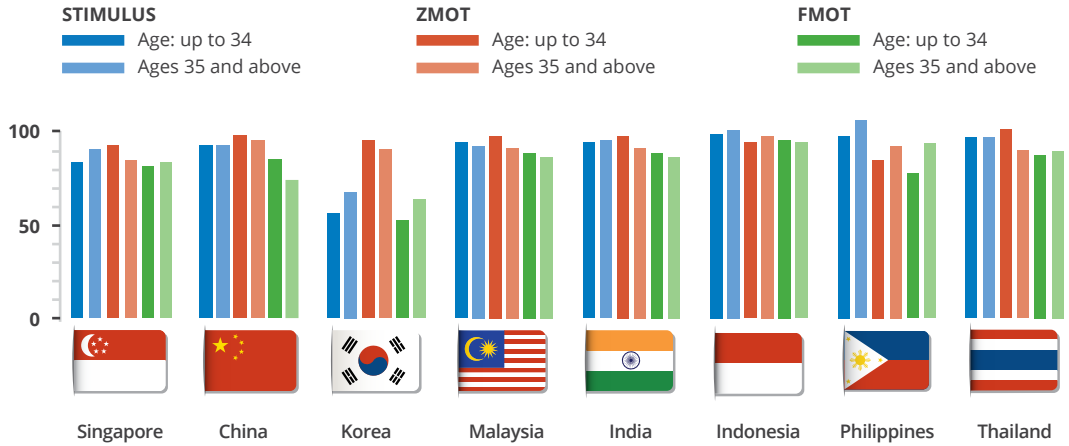
### Use of different categories of information sources



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Baby care product base: Total (n=1372)

Figure 1e

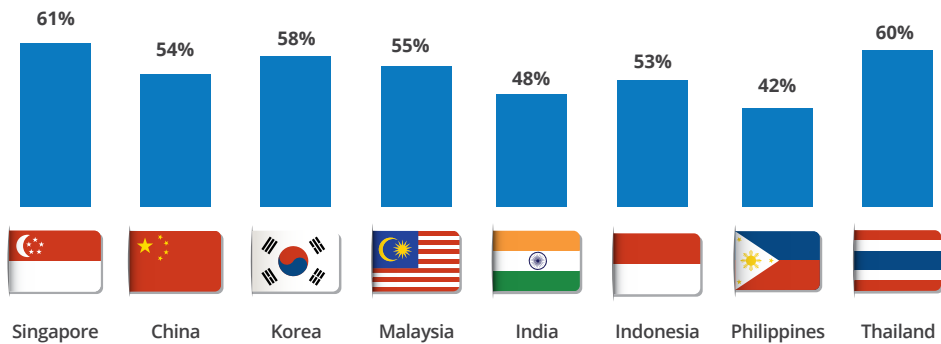
Use of category of information source for last purchase, by age



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Baby care product base: Total (n=1372)

Figure 1f

Use of search in household product purchase



QD2b: "When you were considering buying [CPG PRODUCT], what sources of information did you seek out to help with your decision?" Baby care product base: Total (n=1372)

# END NOTES

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## Chapter 1

### **Changing the Rules**

1. The first use of this term that we know of was in a SymphonyIRI Group report in October 2009: "Zero-Moment of Truth: Redefining the Consumer Decision-Making Process."
2. eMarketer report, June of 2013.
3. MasterCard Worldwide Intelligence, Online Shopping Survey. March 20, 2013. Asia Pacific. Markets: Indonesia 54.5%, China 54.1%, Thailand 51%, Hong Kong 40%, Korea 40% Singapore 40%.
4. "How Digital influences How We Shop Around the World," The Nielsen Company, August 2012.

## Chapter 2

### **The New Mental Model**

1. GlobalWebIndex Q4 2012; ZenithOptimedia Advertising Expenditure Forecasts, June 2013.
2. "The World in 2013: ICT Facts and Figures." International Telecommunication Union, 2013.
3. "Internet Users per 100 people," World Bank website data, 2013.
4. Run by Hicham El Guerrouj of Morocco at a meet in Rome on July 7, 1999.

## Chapter 3

### **ZMOT All Around Us**

1. Google internal data.
2. "Wave 6: The Business of Social." Universal McCann report, 2012.
3. Google internal data.
4. Product details per the LG.com website, 2013.

5. "In-Store Sales Begin at Home" by Ellen Byron, The Wall Street Journal, April 25, 2011. The article is based, in part, on a survey by Booz & Co. and the Grocery Manufacturers Association.

#### Chapter 4

### **Rating and Reviews: Word of MOT**

No notes.

#### Chapter 5

### **Equal Thought, Not Afterthought**

1. Author interview with Samir Singh, Lifebuoy Global Brand Vice President.
2. Google internal data.
3. Akamai, "The State of the Internet," Q1 2013. Volume 6, number 1.
4. Telecom Regulatory Authority of India report, July 2012.

#### Chapter 6

### **How to Win at ZMOT**

1. Informa Telecoms & Media press release, December 18, 2012.
2. Google internal data.
3. "Can YouTube Rake in Google-Size Revenue?", AdAge.com, Feb. 1, 2010.
4. "L'Oréal Launches New Makeup Line Designed by YouTube Beauty Guru Michelle Phan," by Greg Jarboe, Search Engine Watch, August 19, 2013.

#### Chapter 7

### **What's Next for Asia?**

1. "Building Trust in a Virtual World" by Z. Justin Ren and Xin Wang, China Daily, August 16, 2013.

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Before joining Google in 2006, Jim held leadership positions at the ad agencies DDB, marchFirst, Young & Rubicam and Euro RSCG.

Today Jim helps marketers address challenges across all phases of digital marketing, from consumer insights to brand-building and direct response programs to data analysis. He's a frequent guest speaker at universities, industry events and conferences. He also serves as Google's "Chief ZMOT Evangelist."

Jim holds an MBA from the University of Illinois and a Bachelor of Arts from the University of Notre Dame. His passion is vintage jazz, which he plays, collects and blogs about with great enthusiasm.



**Joanna Flint** is the Head of Consumer Packaged Goods for Google Asia Pacific. She has 15 years of experience in the digital industry, 10 of them in Asia, and has covered all aspects of digital marketing, e-commerce and social media as a client, consultant, and now media owner. She is based in Singapore, where she develops strategic business partnerships with the largest brands driving the sector.

Before joining Google, Jo was a founder member of British Airways' eBusiness division; led Singapore Airlines' global foray into eCommerce; and headed Ogilvy's digital and CRM consulting practice, delivering strategies for clients such as Diageo, Levis and Coke.

Jo is committed to industry education and driving change. She has authored white papers including 'Social Media Asia: Can Brands Have a Social Life?' and '3G: Mobile Future or Latest Fad?' She is a regular industry speaker and helps brands drive business criticality into digital efforts with trends, data and insight. She has a BA Joint Honours from the University of Manchester in the U.K. Outside work, her love is for all ball sports, and spending time with her husband and two boys.

Winning the Zero Moment of Truth in Asia

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