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Using Digital Communication in Hair Coloration

in Portugal to L'Oréal

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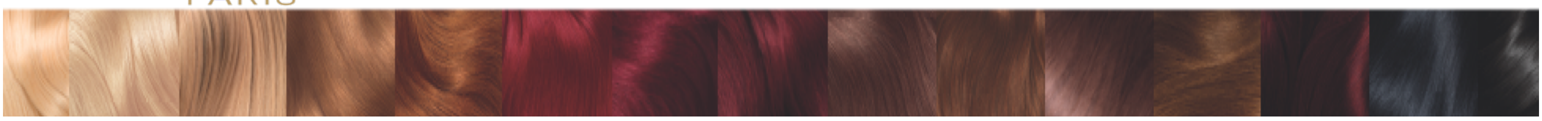

Using Digital Communication in Hair Coloration in Portugal to L'Oréal

Abstract: The purpose of the current Work Project is to analyze the different aspects of digital communication with focus on hair color division of L'Oréal Portugal. Despite being the market leader, the company is under attack by new entrants in the market – Henkel (since 2009) and Revlon (this year) – with urgency in reaction. Plus, consumers are getting more and more demanding, where digital technologies have a great influence on the way they shop, specially on the decision-making process. Companies must take advantage of the new way consumers search, share reviews, compare prices, look for deals, before actually buying, targeting them in the right moment of their decision journey.

Keywords: Digital Marketing; Inbound & Outbound; Social Media; Mobile Marketing

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1. BRIEF CONTEXT

1.1 Client

The current Work Project is an academic extension to the CEMS Business Project with L'Oréal. Regarding the company, L'Oréal is considered the world leader in the beauty industry, being presented in 130 countries on five continents. The group's mission is to provide the best in cosmetics innovation, with unparalleled commitment to technology, offering ground-breaking, high-quality products for women and men around the world, with respect to their diversity. *L'Oréal notably decided to celebrate the diversity of beauty*. Besides many other categories, hair coloration is one of its core and most valued market, where it holds an undeniable leadership, with around 67% of market share in Portugal in 2015[i] (see Exhibit 1 for more detail on market share by brand evolution). In this category, the company embraces several brands within two big mother brands – **L'Oréal Paris** (Excellence, Casting, SunKiss Jelly, …) and **Garnier** (Nutrisse, Olia, Color Sensation, …). As future objectives, L'Oréal aims to sustain and strengthen its leadership position within the hair color category.

1.2 Market overview

Besides L'Oréal leadership in the hair color market in Portugal, the category landscape has been changing recently. In 2009/2010 Henkel entered the market with three brands (Keratin, Palette and Syoss) and gained 15% market share in 5 years, representing an outstanding result. P&G (Bellady) was the player who suffered the most with this new entrant, losing 11% market share in 5 years. However, L'Oréal lost around 10% market share as well, between 2005 and 2015 and sees its leadership position under attack, where there is urgency to react.

Furthermore, the whole market decreased 1,6% in value from 2005 to 2015, result of 2 combined effects: lower average product price and decrease of penetration rate. Despite the decreasing penetration rate, frequency of purchase has actually increased in January 2016 (Source: Kantar Worldpanel). Regarding the decreasing pricing level, Henkel contributed to make it become a promotion market and with entry prices much lower when compared to the competition (see Exhibit 2 for more detail into pricing strategy). In fact, around 44% of all products sold in 2015 were in promotion[ii], revealing the price sensitivity of consumers and leading to price wars between brands.

Additionally, Revlon is entering the Portuguese hair color market this year (2016), with a wide offer on no-ammonia products, creating a major threat for the incumbent firms in the market, due to an increasing demand on products that are more natural and, thus, perceived as less hair damaging (findings from qualitative research, further discussed).

1.3 Current client situation

As mentioned, L'Oréal stands a strong leadership on the hair color market in Portugal, with a great awareness among the consumers, a positive brand image and a high trust on a well-established global brand, reflecting on its experience, expertise and continuous innovation. Further, L'Oréal presents a wide offer of hair color brands and products, from temporary to ammonia-free and covering an extensive color shades range. In terms of communication, L'Oréal excels as a marketing expert, with a strong celebrities' brand endorsement. However, the company may find some weaknesses concerning consumers' proximity, without any fully-owned stores, where distribution and shopping experience would be highly controlled. Plus, L'Oréal has a higher average price level when compared to competition, with little presence in entry price segment (below 6€) and its customers reveal a low brand loyalty. Regarding digital presence, the company reveals a lack on consumers' interaction and engagement with digital platforms, not leveraging their high potential.

Concerning future opportunities, L'Oréal may want to look into all the alternative distribution channels (independent stores, pharmacies and salons) to rise its presence in places that are increasingly gaining attention from consumers apart from the traditional mass market (hiper and supermarkets). Besides, the company must keep attentive to the "digital revolution" being felt in Portugal, with increasing internet penetration rates, mainly in the 15-44 years old segment (99,5% in 2015) and strong growth estimation of e-commerce of 58% from 2015 until 2020[iii]. Plus, economic recovery from past years aligned with a higher frequency of purchase is an opportunity for L'Oréal to grow the consumer base, tackling the increasing demand for products with natural ingredients that are perceived as less harmful for hair health. On the other hand, L'Oréal will encounter more future challenges in a market with a decreasing penetration rate and where new entrants contributed for market shrinking and devaluation, due to an aggressive entry price and promotion presence. The increasing popularity of alternative distribution channels may represent a threat, where L'Oréal lacks on shelve space or even not being present. A reason appointed is that other competing brands are preferred, due to a lower price range, better fitting with the target market of those independent stores – low to middle income segment. Henkel broad hair color line, well established in foreign markets, may represent another threat, as the company can easily launch those products in Portugal, tackling consumers' needs regarding natural ingredients and natural shades. Therefore, the entrance of Revlon represents a big threat as well, due to its strong presence in no-ammonia products.

1.4 The Business Project challenge

When compared to other European markets, coloration in Portugal still has a quit low and decreasing penetration rate of 11.7% in 2015 (13,3% in 2014) (Source: Kantar Worldpanel). Therefore, the main challenge of the Business Project was to find ways to grow the category, given the recent new entrants, changing the market landscape and leading to market share loss by L'Oréal, in a three-years integrated marketing plan. So, to achieve the main objective of category growth, L'Oréal needs to retain and grow the customer base of the company, tackle the threat of the new competition and improve consumers experience. The first step that we found was crucial, after doing some qualitative research, was to educate consumers about the hair color category, due to the myths and fears attached to their minds; and improve the value proposition to retailers, who have a big influence on distribution, but do not perceive the category as a priority.

2. REFLECTION ON THE WORK DONE AND INDIVIDUAL CONTRIBUTION

2.1 Problem definition

Looking into the current situation of the market it is clear that the most critical matter is the devaluation of the market, provided by a strong in-promotion sale (44% of total products sold) and entrance of new players, strongly competing in low price segments. In fact, together with the decreasing number of consumers (penetration rate), the market is shrinking. So, L'Oréal's main future objectives is to grow the category and improve customers experience.

In order to tackle the decreasing penetration rate, it is important to understand the segments with the biggest potential to recruit new consumers into the category. In terms of age segmentation, the market can be divided into three main categories: the youngers (18-34 years old); the core segment (35-55 years old); the elders (55+ years old), where the *sexygenarians* is included (60+). The biggest potential can be found in the two extreme segments (the youngers and the elders), since it is where non-users and "abandonists" can mostly be found, respectively. On the one hand, the younger consumers may represent a more valuable future relationship, being recruited in an early age (higher customer lifetime value), being quite urgent to increase the number of consumers in this segment. Plus, the biggest decline in penetration rate from 2014 to 2015 (variation) happened in the 25 to 35 years old segment – 22% variation decline[iv]. However, they might be harder to convince and recruit as they are quite reluctant to enter the market, mainly because they do not have gray hairs and/or perceive hair coloration as a hair damage behavior (findings from qualitative research, further discussed). On the other hand, the elder segment has many ex-users, who were tired of the whole process and decided it was time to be proud of their age and gray hairs. So, improving customers' experience is crucial to recruit in this segment. Additionally, this segment has some non-users, who say they have never felt the need to color their hair, since they feel good about their own appearance, where gray hairs coverage is not a need (even though they might have it).

From a broader insight of the qualitative research, it was found out that, in general Portuguese consumers are quit confused about aspects of the hair color category, believing in several myths and having a lot of fears, which make some of them to avoid entering the category. So, in order to recruit non-users and try to make the users increase their average consumption (convert light to medium users and medium to heavy – usage reference by Kantar – see exhibit 3), education is required. These two segments are the ones where L'Oréal can grow its customer base and thus, grow the category.

2.2 Methodology

2.2.1 Hypothesis

From the qualitative research performed, it was expected to find a quite confused consumer, who does not understand the different technologies available or know how to choose the right product for herself. It was expected to find a majority of consumers concerned about hair damage through hair coloration, and thus, an increasing demand for natural ingredients products (e.g. no-ammonia, no parabens, oils/natural plants in composition). Further, it was anticipated that the main reason behind the use of hair coloration products would be the gray hairs coverage and that consumers believe in several myths concerning hair coloration.

So, we could tell that in beauty there will always exist pockets of passion and pockets of anger, when consumers' needs are more concerned with feeling good and having fun, providing a slight change to their image; or when consumers feel they do not have other option then to use those products due to social pressure, respectively. So, before actually making the interviews, we could perceive hair color as a very emotional category, where women can be super happy or completely dissatisfied with the outcome.

2.2.2 Methodology

It was performed a qualitative research, consisting on nineteen in-depth interviews, several store visits and in-store observations. The main research objectives were to understand the consumer's journey and experience with the category, which would uncover the way they use coloration products, what makes them use those products and which factors make some of them to avoid the category. Specifically, the topics covered on the in-depth interviews were: category perception; purchase behavior; shopping experience; brands perception; media consumption. Further, for the interviews it was used a non-directive method, projective techniques and topic analysis (see exhibit 4 for the detailed script of the interviews). The interviewees were chosen regarding personal connections, with an effort to have the number of users as around twice the number of non-users, plus a presence on each of the main age segments, and even a distribution by heavy, medium and light user (see exhibit 5 for detailed interviewees-demographics).

Regarding the store visits, with the helpful attendance of the Business Project Business Advisor Federico Nigra, it was arranged several visits to the most relevant retailers in Portugal (GJM Pingo Doce, Soane Continente, Auchan Jumbo, Intermarché, MiniPreço and Lidl). The main goal was to understand one of the key success factors of hair color market – distribution.

Finally, the in-store observation was performed in ElCorte Inglés (S.Sebastião, Lisboa), in order to have an additional insight from store visits and to understand how consumers shop in this category.

2.2.3 Analysis

From the in-depth interviews, it was uncovered the real needs of the consumers regarding hair coloration, the fears and some myths attached to their minds. Concerning the needs, the most reported ones were: **gray hair coverage** (mainly in the older age segments); a slight and gradual change, namely lightening the hair in summer time (mainly in younger segments); a **convenient application**, easy and as quickly as possible; reducing as much as possible the **hair damage** from hair color - the biggest concern - consumers want a product that keeps their hair healthy, often associated with products with natural components and no ammonia; **natural and homogeneous colors**, not to be perceived as "fake"; **control and predict the outcome** of hair coloration process. The former need implies the need for a better understanding of the color scale, which most users don't entirely comprehend. Users are, furthermore, confused about the issue that the same coloration will lead to different results depending on the base hair color of the user - hair colorations also lead to different results depending on whether they are applied on natural or dyed hair. Therefore, it was reported a high trust on experts' advice, given the risk involved and the hard to predict outcome. The main insight of the qualitative research conducted are summarized in exhibit 6.

The myths uncovered from the interviews are the following:

- Hair coloration damages hair
- Coloring hair is a complicated process
- Coloration is time consuming
- Hair coloration never looks natural
- Hair coloration is not reversible
- Changing hair color is a huge step
- Every product sold on supermarket has ammonia
- It is beneficial to the hair to keep changing brands
- There is no temporary hair coloration sold in supermarket
- Hair color products smell bad
- The hair color I want is not provided on supermarkets
- Curly hair cannot be colored

Further, in terms of media usage among hair coloration consumers, our qualitative research showed that the older consumers receive information mainly through TV and print media. Younger consumers on the other hand stated they do not watch regular TV with advertisements and prefer to receive information via internet, with a strong focus on their social networks. This finding indicates that consumers under 35 years old, which represent 18.6% of coloration buyers, are very active and easier to reach through online marketing tools. However, consumers over 35 years old (82,4% of hair color buyers in Portugal) prefer the traditional media channels (figures retrieved from Kantar Worldpanel).

From the stores visits, it was observed a great amount of damaged packages that can reveal a low inventory turnover, providing a poor brand image. Plus, the font size normally used on packages is too small for some people to read, namely the Excellence packages for older ladies. More broadly, some stores had little variety, in terms of brands and in terms of color shades (specially concerning the brown shades, given its importance in the Portuguese market). In some stores, there was a lack of organization or unclear shelve navigation (e.g. disposal by technology used – oils, permanent, temporary), sometimes ignoring L'Oréal's proposal to the retailers. Finally, specifically in Auchan, it was observed different prices for different shades from the same brand.

The in-store observation highlighted some insights from the in-depth interviews, when consumers were looking puzzled to hair coloration products, some quite overwhelmed and leaving the shelve without a product – consumers are not 100% clear on how to choose their hair color. Plus, it was observed the comparison of their own hair with the hair samples in-store, reinforcing the challenge to choose the right color or products.

2.3 Recommendations to the company

Several recommendations were suggested in an integrated three-years marketing plan, tackling the specific problems found out. Those tactical plans are designed to target specific audience, specific brands and, at the same time communication channels of the campaigns are selected based on media consumption of each of the groups. Young segment will be addressed with digital and out of home campaigns, as *Dispel the Myths* and in its consecutive follow up campaigns *Slight Change* and *Easy Solutions* (along with several product launches proposed). Sexygenarians & *abandonists* will be approached by *Consumer Academy* workshops and the *Give your mum a day off* campaign. All consumers are, however, getting in touch with the category at the point of sale, therefore, *Color guarantee* campaign will be aimed to all consumers, creating multiple communication channels for their convenience: digital, consumer service hotline, online chat or Skype and point of sale. There was the concern of creating direct points of contact, establishing a relationship of mutual interaction and co-creation with consumers. So, a permanent expansion and improvement of the consumer service will lead to different communication channels designed for every target consumer group. Proposed point of sale changes will simplify and clarify the process of product selection. Broadening and expansions in terms of L'Oréal's digital presence will increase penetration and enable the formation of closer relationships with the consumers while boosting consumer engagement and creating an online real-time beauty community.

So the clear overall strategies are: product innovation; smart educational campaigns; enhancing the point of sale experience and maintaining the pricing strategy. Building on such strategies, the tactical plans proposed are: launch new products from international markets that are addressing consumers' changing demand; launch new consumer service & engagement tools; help consumers surpass their fears and support them in clarifying their choices; establish social media presence and consumers' engagement; solve the distribution gaps; introduce clear shelf navigation; keep premium pricing for core product range; fight competition with a newly launched flanker – all met with the specific campaigns and services mentioned above.

Through all the proposed recommendations, L'Oréal will not only grow the category and improve the consumer experience at each stage of the journey, but also stay the preferred brand and market leader in the category in Portugal.

2.4 Concerns

The first concern appointed refers to the fact that the plan of actions was kind of restricted since the beginning. Specially regarding the product itself product (e.g. new product development, change packaging), since the Portuguese market does not have enough scale to decide in this matter. Therefore, the proposed future launches are products existing in foreign markets, where the success in the Portuguese market will always be unpredictable before. So, despite being an attempt to respond to gaps in the market, the products are not tailor-made to Portugal.

Regarding the insights from the in-depth interviews, it is merely perceptions not conclusions about the Portuguese consumers, since the sample size is not representative.

Further, the project's feasibility is demonstrated by a profit and loss analysis, which actually shows a very positive picture of the outcome of such recommendations, with category growth and L'Oréal market share increase (around 5% in 3 years). However, the analysis is broadly based on estimations, where benchmarking with past campaigns and product launches was used to access the estimated performance of recommendations.

2.5 Individual contribution

Concerning my individual contribution, the topic chosen is **digital communication** within the hair color market in Portugal, specially concerning L'Oréal.

Communication is, in fact, one of the deepest need of human race, where disruptive technological development completely changed the way companies use the digital to reach consumers and the way they engage with themselves. It is a highly volatile ground, where a leading firm like L'Oréal must stay ahead, creating and anticipating possible touchpoints with the customers.

A broad overlook on digital marketing is introduced, followed by a discussion on the four main elements of digital communication. Finally, a specific successful L'Oréal campaign is discussed.

2.5.1 Digital Marketing

Digital technology (DT) came to completely change the landscape of communication in several aspects: the way firms engage with consumers (*outbound marketing*); the other way around (*inbound marketing*), specially the way consumers search for information; and the way consumers interact with each other. Therefore, it led to a new consumer behavior, which was impossible before and even more disruptive due to social media and mobile technology (see exhibit 7 to understand the main elements of digital marketing).

From the firms' perspective, DT made it possible for companies to better understand the **customers' decision journey** (see exhibit 8 for a picture of all the phases), creating opportunities to personalize and customize the service offering – **behavioral advertising** - with a positive impact into customer-firm relationship. In fact, through Internet, consumers can go over all the steps within their decision journey (consider – evaluate – purchase - advocate), using the same medium and within the same session. Additionally, DT made it possible for firms to monitor what is being said in the digital world about themselves and sometimes even control it (or try to). Having this information in hands, companies can better know each customer individually and can better target and link the marketing touchpoints into sales, ultimately increasing the so-called **customer lifetime value (CLV)**.

The greatest advantage to the firm from DT is the fact that an increasing part of advertisement effort is made by the customers themselves, when they create and share content related to the firm – the so-called **earned media**, which comes to complement, but reduce at the same time the need for **paid** and **owned media**. Another strategic advantage is highly reduced costs, where the daytime becomes prime time – audiences that could never be reached before, are now available, attentive and real-time interactive.

From the customers' perspective, DT opened a new window for them to search, ask and share information, creating the **word-of-mouth** (WoM), which reduces barriers to information access and increases trust, as we tend to believe more easily our peers – a Nielson study reported that

90% of consumers trust recommendations from other consumers, compared to 56% who trust brand advertisement[v]. However, WoM can be quite disruptive to the firm, when it becomes **viral**, due to the capacity of reach internet potentiates, specially social media power – in a single minute in 2014, there were 2.5 billion shares (pieces of information shared) on Facebook, 4 million Google searches, and $830.000 spent in online shopping at Amazon[vi]. On the other hand, when WoM is positive to the company, then it is the best marketing tool it can have, as a really low-cost option that helps building company's brand. So, brands are no longer what the company says they are, but actually what consumers say to each other.

Spending on digital advertising almost reached $116 billion globally in 2013, meaning that a big focus is given to this "new" marketing weapon (see exhibit 9). However, companies need to make digital channels the most effective investment, to communicate with, engage, and influence consumers, given its potential. There is already evidence that companies are missing important opportunities. In Portugal, in 2015, around 6.8 million euros were invested in advertisement (+10% vs 2014), where only 7.8% were allocated to digital advertisement and 85% went to TV (free-to-air). It clearly shows that Portugal is a "TV country", with 99.9% of TV (FTA) penetration and only 66% of internet penetration[vii]. However, it is an increasing penetration rate that firms must consider, through digital presence and communication (see exhibit 10 for more detail). Actually, L'Oréal hair color division in Portugal, allocates around 20% of media investment into digital channels, way above the overall Portuguese average, showing the digital focus of the company's media strategy. On digital the two channels where there is more spending is Facebook and YouTube.

Through the section that follow, the four main elements of digital communication are examined, providing L'Oréal strategies in each element and some possible improvements.

A. Outbound marketing

Outbound marketing occurs when firms initiate the conversation and communicate with the target consumers. In digital channels, outbound marketing takes the form mainly of **search** and

display advertisements. Regarding the search ads, it all starts when a consumer types on a search engine like Google some keywords concerning what he/she is looking for. In return, the search engine shows some **organic links** (search results), as well as **paid links** (the search ads, that companies pay to be there) – the latter normally appearing above or on the right side of the organic links. L'Oréal hair color reveals a lack on search ads investment, when searching on Google hair color related keywords (in Portuguese), the results are quite disappointing for the company (for some examples see exhibit 11). Being the market leader, it was expected that anytime a hair color related search is done, L'Oréal would appear everywhere and specially in the top links, outbidding competition. So, some investment must be considered in this area, requiring a thorough keyword portfolio management, where the possible choices for keyword search are vast, even for one single idea.

Regarding display ads, it does not require any search effort made from the consumers – can appear on a website that the brand may consider relevant for its target audience. **Click-through rates**, eye-tracking studies and other related indicators, suggest that consumers are ignoring digital ads. One of the main reasons appointed is the intrusive and interruptive features of those[viii]. Therefore, some strategies are coming out, like the **native advertising**, which reduces significantly the intrusive feature, with advertising content that blends with the main story or editorial content of an article (contextual ads). From a BuzzFeed experiment, the click-through rate increases considerably from a 0.02% of traditional banner ads to 1% to 3% of native ads[ix]. Another strategy is the so-called **morphing display ads**, which are non-static ads, varying for different individuals visiting the same webpage.

L'Oréal's digital strategy is lacking presence on display ads – just a few were found in its own website (http://www.lorealparis.pt) and some on YouTube - which might be an internal strategy not to disturb or bother the consumers. A good alternative to this channel of communication, given all its appointed disadvantages, is the shift towards a **brand content marketing** experience. So, L'Oréal can leverage on its existing owned webpages (e.g. websites, social media pages), continuously and consistently publishing meaningful content for the target market, in a simple and useful way (e.g. fashion tips, hair care advices, do it yourself tricks). This would help customers on the consideration and specially on the evaluation phases of their decision journey, while addressing the fears and myths attached to hair color, through a smart, effective and continuous consumer education.

So, while search ads may have more impact on immediate action – purchase – display ads can have two objectives: either immediate action (purchase) or increasing brand awareness (consideration and evaluation), together with TV and print media advertisement. However, both channels should not be analyzed in isolation – a study by Microsoft and comScore concluded that search and display ads together increase customers' intention to purchase, more than each channel alone[x].

B. Inbound marketing

Rather than seeking potential customers through advertising, inbound marketing positions the company as a target consumers search for. Its importance is rising, as the influence of advertisement on customers is decreasing and consumers' search for information is rising. So, the company needs to make sure it is found when consumers search for information.

When typing some keywords on search engines like Google, some links appear in a specific order (organic links). Relevancy (based on factors such as page title, page content, and meta tags) and importance to customers' queries are the basis for this order, where every page owner wants to be in the top positions. Specifically, Google uses *authority* of the page to rank it – importance and credibility of academic papers used as reference. Further, through eye-track studies it is known that people do not look down the result page and do not go further than the first page[xi]. So, the major challenge for any company is to anticipate the keywords and search queries consumers may have, in order to rank on the top positions of the organic links. **Search engine optimization (SEO)** is the online marketing communication technique used to do so, in order to attract visitors to the webpages and ultimately convert them into customers and promoters of the content (see exhibit 12 for an illustration of those steps).

Therefore, besides being found, the company/brand must make sure the content is relevant and the landing page is optimized so that consumers stay and might be converted into customers. Here, the previous mentioned brand content marketing experience is really important, providing the consumer with what he/she is looking for, with no intrusive content.

In fact, very recently (end of April 2016), L'Oréal Portugal restructured its website, making it a much pleasant landing page in terms of design. However, much can be done content-wise, in order to really engage consumers and make them stay with the company/brand through the whole decision journey and enhancing their experience in each phase.

Concerning the SEO, through several search queries, L'Oréal Portugal evidences again some fragility in this area, like it does for the paid ads (see exhibit 11 for some examples). Specially, when the search keywords do not contain the brand name, L'Oréal Portugal does not rank in the top positions.

C. Social Media

Social media has the most potential out of other digital media channels, in terms of growth, penetration rate, reach or cost effectiveness. However, there are still some reluctance from companies to use it, with evidence of underinvestment in this area[xii]. In fact, social media is where consumers communicate with each other, through different platforms, where WoM is created, impacting consumers' behavior. Therefore, from the firms' perspective, engaging customers through social media is not optional, but rather an imposition of modern times for future success.

To engage consumers, the content must be relevant, personalized to the target, interactive to foster buzz and authentic to create the feeling of trust and belonging to a community. So, a social media strategy to work, it needs commitment and organizational change to embed the strategy and to understand its impact – one of the main fears companies have is the way to measure the return of this marketing channel. Despite all its advantages, while there is an increase in consumers' engagement, it is normally accompanied by tradeoff on the brand control over what is being said.

Sometimes, firms miss the main point of social media – **people's main goal with those platforms is to connect with each other, not with companies**[xiii]. So, the companies that find returns and succeed in online social media, use social strategies to help people create or enhance relationships with the others, in a way that benefits the company. The keys to success are reduction of costs or increased customers' willingness to pay by helping them establish or strengthen relationships, through smart social strategies (e.g. Yelp's social strategy gets the company to obtain free quality content, by allowing the most passionate and prolific contributors to be part of an "elite group" and meet like-minded people)[xiv].

In this field, L'Oréal hair color in Portugal shows some fragility, from a low engagement Facebook (FB) page(s) to inexistent Instagram or Pinterest account. The company would leverage social media much more by having a specific FB page for hair color division, with more tailor-made posts to the Portuguese consumers, making use of the platform multiple features (e.g. tabs, apps), but mostly, helping the users to reach their main goal – to establish or strengthen relationships. To foster the later objective, as it was recommended on the Business Project, L'Oréal can create the real-time live community, where "real people" interact with each other. This social strategy would then reduce costs to the company, by acquiring content for free (personalized advice), by helping people meet. Instagram and Pinterest would then reinforce the social media strategy and work as a follow-up of FB content.

The YouTube channel has several tutorials, but again the channel is not hair color exclusive and, as mentioned before, people tend to trust their peers and not so much brand-made content. Another really important channel for L'Oréal is the bloggers, where "real people" share their experience and recommendations regarding specific products. L'Oréal is currently targeting this channel with the so-called Bloggers Academy, in order to be a step ahead competition and taking advantage of such a powerful tool.

D. Mobile Marketing

Mobile consumption is the new reality of the on-the-go and 24/7 connectivity trend, creating more opportunities for the marketers to connect with the consumers. The Portuguese are using more and more the mobile devices, with the smartphone penetration rate reaching 55% in 2015[xv]. However, mobile investment accounts only 7% of the digital investment in Portugal in the same year, proving the underinvestment in this channel. There is urgency for firms to invest on mobile, to reach the consumers right in the beginning of their decision journey, specially when they search, consider and evaluate the options they have – zero moment of truth[xvi]. In fact, the main purpose of mobile internet usage in Portugal is search[xvii]. Despite searching before (normally at-home) shoppers are increasingly searching through their smartphone in-store, when they are in from of the shelf – first moment of truth – mainly to compare prices among competitors. So, another phenomenon arises, the so-called *showrooming*, when shoppers use the mobile phones in-store and then purchase online or via mobile[xviii]. This way, investing on mobile can actually mean the creation of touchpoints in every phase of the consumer decision journey.

In order to serve mobile consumers, companies normally feel that it is enough to adopt a desktop strategy to fit the mobile device. However, The Google Mobile Playbook explains that should be avoided – e.g. display or search ads that may work well on desktop, will reach a smartphone user only 14% of the time[xix]. Companies should leverage on other feature that the mobile technology brings (e.g. geo-location) and on redesigning for a tailor-made and user-friendly experience. After mobile-optimized webpages, companies should focus on the *apps* to enrich the relationship with users and engage with future customers well before they are ready to buy – 86% of the time consumers spend on smartphones is devoted to using *apps*.

L'Oréal Portugal has a very successful mobile app for makeup products – Makeup Genius is the first virtual-reality makeup app that instantly applies makeup products to the moving image of the user (introducing some entertainment as well). It is then possible to take snapshot of the look, share with friends and even immediately order the products online. So, with one single app, L'Oréal can foster all the phases of the consumer decision journey, from consideration, (when people realize this app exists and download it) to evaluation (when consumers can try all the products virtually), to purchase (that can be done instantly), and even becoming brand loyal after the experience with the brand. This year the same kind of mobile application was designed for professional hair color division – Style My Hair. And a Hair Genius app is being designed for the in-home hair color segment, going through all the phases of customer decision journey.

2.5.2 Best practices

This year, by the end of March, L'Oréal launched the Magic Retouch, an instantly roots concealer spray, which promised to solve one of the major problems women face when they have gray hairs – the roots popping out after a while of having coloring their hair. In fact, the launch in Portugal has been a huge success – specially when compared to other market – with L'Oréal excelling on digital communication. With a single campaign, the company was able to touch consumers at all the steps of their decision journey, from creating awareness of new product, a positive attitude and leading to purchase and trial.

For the consideration phase, there were several ads on TV, out-of-home, printed media and teasers on social media and own webpage. Then, anticipating a search from consumers to know more about the product, several short videos starring the brand ambassador Eva Longoria were put online, (website, YouTube channel and Facebook page) showing the different unexpected/emergency situations women may encounter with a bit of humor and personal connection. Those videos work as tutorials at the same time and have two clickable links in the end: one to know more about the product, redirecting users to a tab dedicated to the product on the webpage (lorealparis.pt); the other is the purchase option, directing to Continente online to finalize the action (see exhibit 13).

Overall, the key success factors appointed by the firm of the Magic Retouch campaign are the following: consumer focused innovation, by tackling one of the biggest problems encountered while using hair coloration; a big digital investment (45% of the total media invested in this campaign) with digital materials tailor made for the use in social networks; huge mobilization of sales team and clients, with great product visibility in store.

3. ACADEMIC DISCUSSION

3.1 Link with MSc field

The chosen topic concerning digital communication is well aligned with my Master's field of Management, as part of digital marketing process. Digital marketing can be defined as the activity, set of institutions, and process for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large[xx], using the internet and digital channels. So, digital marketing uses the internet and information technology to extend and improve traditional marketing functions. Communication is indeed crucial to get consumers attention, which has increasingly become a scarce resource. However, much of consumers' attention nowadays go to the digital world, thus, playing as an advantage for digital communication, which makes it a hot topic.

3.2 Relevant theories and empirical studies

Several studies and theories arise around the digital communication. In the following sections, two considered quite relevant are discussed.

Zero Moment of Truth

Marketers have been using a three-step mental model of stimulus (e.g. watching a TV ad), point of sale (first moment of truth), and experience (take the product home and try it – second moment of truth). Google and Shopper Sciences performed a comprehensive study, in order to understand where influence on consumers mostly takes place from going to undecided to decided. Findings show the average shopper is using more and more sources of information before the final purchase. Now, they do search, get smart about alternatives, read reviews, compare different competitors, all before actually buying. Thus, a fourth step appears in the marketing mental model, after receiving the stimulus. The ZMOT is highly relevant and influential towards the final decision, as consumers have changed the way they do decision-making. Thus, marketers have to keep up with this new mental model, keeping all the four steps spinning and gaining a true competitive advantage in today's marketplace. Plus, Google findings say that those moments are increasingly mobile – the ubiquity of smartphones means that it is an integral part of the constantly connected consumer. Search is always accessible, from anywhere, on any device and at any given time.

In fact, with products that have a high involvement (e.g. cars, technological products) a consumer's purchase may not occur immediately upon seeing an ad. Instead, consumers often spend several weeks or months studying the alternatives, using multiple online and offline information sources – the ZMOT. There is evidence, from the qualitative research conducted, that hair color products may be considered a high involvement category, where L'Oréal must be prepared for such phenomenon.

One of the first rules appointed by Google for firms to be successful at this stage is to be fast – "Digital marketing teams have to be poised to make the most of any edge" (think with Google, 2013).

The brand Dermablend of L'Oréal, excelled on the ZMOT with its video campaign in 2011 - "Zombie Boy", which went viral. The short video showed the model appearing to scrub away his skin (with a Dermablend makeup foundation) to reveal the skeletal features of his tattoos underneath. The brand hit the jackpot on a limited budget with the video, which generated millions of views within days. However, the biggest hit came when Google approached the brand to have a banner ad on YouTube (a masthead). Being the main goals of Dermablend to boost brand awareness and drive new visitors to its webpage, while encouraging viewers to share the content, the campaign could not have been more successful. In fact, search interest rose to historical peaks, specially after the YouTube masthead. Besides, looking into the future, the brand added a remarkable pixel so it could re-engage users at the ZMOT in the future.

Programmatic Buying

Our daily routines are undoubtedly getting influenced by the digital technology, making it a great time for digital marketing. Today, brands can actually generate interest in their products, win new customers by engaging and moving audiences when it matters the most. So, marketers can now have a real-time connection with audiences, with a highly relevant, engaging, creative communication - which has always been something aspirational – through programmatic buying. This technological advancement allows brands to use audience insights and technology to tailor messages to the right person (one-to-one basis), at the right moment, in the right context. Plus, it helps brands respond to real-time signals on an impression-by-impression basis, across screens and across channels. So, the results are outstanding, due to the level of relevancy and real-time that inspires people to take action - “When an ad is delivered in real-time to an individual, they are twice as likely to interact with it” ("Media Economy Report," Magna Global, 2014).

Besides, the big opportunity for the firms is in creating unified, cross-channels digital experiences. This means that programmatic buying, which is done in an integrated technology platform, considerably enhances the value of audience insights and creative ads by helping brands evaluate, purchase, activate and measure media on a global scale, in real time – meeting all marketing needs in one single platform.

In fact, L'Oréal Canada *found beauty* in programmatic buying. Specifically, the luxe makeup brand Shu Uemura was having outstanding global sales, but not so much on North America. So, the goals at the time were to raise awareness of the brand in that market, increasing sales and email subscriptions. By combining first-party data with programmatic buying, L'Oréal's Shu Uemura was able to deliver targeted messages to the right consumers, leading to more engagement with the ads and, ultimately, more purchases. The campaign drove almost two times the revenue anticipated. The remarketing tactics achieved a 2,200% ROAS (retune on ad spend) in the acquisition phase of the campaign and exceeded all CPA (cost per action) targets[xxi]. Besides, the company found it really helpful to have a unified solution, to better manage the media campaign, with real-time data that made it more transparent and easy to make changes – boost in efficiency.

So, programmatic has transformed media buying and is actually a must for successful digital brand marketing.

3.3 Implications for theory and future research

Digital communication is indeed a moving ground, due to the fast-paced technological advancements. The state of the art as it is right now can drastically change in a couple of months. As companies want to excel at each phase of customer decision journey, targeting the shoppers at an early stage and aiming to make them loyal and stay with the brand, it is getting harder and harder to understand them. Consumers' minds and decision-making process got even tougher to predict and monitor when digital enters into the picture. Plus, consumers are getting more demanding in all phases of their decision process – they increasingly search before buying, across channels, and if they did not like the product/service they will tell the others.

So, entering the digital world is really imperative, not just an add-on, but embedding it into the current marketing strategy. No matter what industry, online competition has never been more fierce. The only way to differentiate and gain competitive advantage is to offer excellence customer service, which might come with the help of specialized tools to make it the most effective possible – targeting the right people, in the right time, in the right channel (e.g. programmatic buying)

Some research can be fostered into the feasibility of integrating digital into current strategy. Can every company actually do it? How hard can it become? Which factors can influence the most?

Further research can be made as well for the marketing mental moment, to keep on track consumer decision-making and the technological advancements, which create the the different moments of truth – what if there is a "below zero moment of truth"?

Additionally, different digital devices are arising. Smartphones and tablets were quite ground-changing when they appeared, but right now they are already a quite solid ground. The next disruptive device might be the smart watches (e.g. the Apple watch) or even digital television, breaking through new challenges for digital media.

4. PERSONAL REFLECTION

4.1 Personal experience

The Business Project and the whole CEMS experience have allowed me to know me better and develop myself personal and intellectually. Further, it let me disclosure some areas I can still improve to better tackle future challenges. So, through the project I could sense my key strengths and weaknesses. I believe I am a very organized person, always trying to follow a pre-design plan and the future steps ahead. Nevertheless, I can easily adjust to changes and deal well with last-minute pressure. Actually, I used to think I needed to improve my performance under stress, but this time I was impressed with the my individual and group performance, given the quite fast-pace of the project. I consider myself an optimistic person, which I believe it is positive to keep up the team morale. Finally, I tend to lead the team, when I feel the group is losing the right track and we have different perspectives about the work that should be done.

Regarding my weaknesses, sometimes I feel quite frustrated when some members of the group seem disinterested and not motivated into the common goal we aim to achieve, and I cannot seem to understand their real motivation-drivers. As future resolutions I want to be able to easily identify each person motivations to better find a fit on my work style with the others, creating harmony and a pleasant work environment. I think to achieve this the team members need to meet each other more deeply and create bonds since the beginning. Besides, sometimes it was not easy to adjust to different work styles, but I believe communication was a key to our overall group successful outcome.

4.2 Benefit of hindsight

I believe the most added value I provided the project concerned my expertise of the Portuguese market, as a local and mainly knowing actual users of the hair color category. Further, from past experience, I knew what was expected from a marketing plan and all the steps to perform a qualitative research, specifically having conducted in-depth interviews before. Thus, through knowledge sharing we could all feel in the same level of expertise.

Finally, if we would start again this project, the number of interviewees would be increased, in order to have even more reliable results. In fact, the initial idea was to perform focus groups, however, due to time and schedule constraints, it was realized in-depth interviews would be a better approach. As for the profit and loss analysis, we would feel more confident if there was available more data regarding past campaigns performance.

5. Key Terms

Behavioral advertising: smart targeting technique based on collected data from individuals web-browsing.

Branded content marketing: form of advertising that uses the generating of content as a way to promote the particular brand which funds the content's production.

Click through rate: average number of clicks-through per hundred ad impressions (visualization), expressed as a percentage.

Consumers' decision journey: all the stages through which the consumers surpass in their decision-making process, from consideration to actual purchase.

Customer lifetime value: the expected monetary value of a customer relationship, based on the present value (PV) of the projected future cash flows from the customer relationship.

Display ad: graphical advertising on the Internet that appears next to content on web pages, instant messaging (IM) applications, e-mail, and others.

Earned media: when customers, the press, and the public share a company's content or discuss a company's brand via word of mouth.

Inbound marketing: the company is the target consumers search for. Rely on earning consumers' interest.

Outbound marketing: the company aims to reach the consumer, pushing product/service offering to the target market.

Owned media: media or channels created and controlled by the company (e.g. websites, social media pages).

Paid media: occurs when the company actually pays to increase visitors or reach (e.g. display ads).

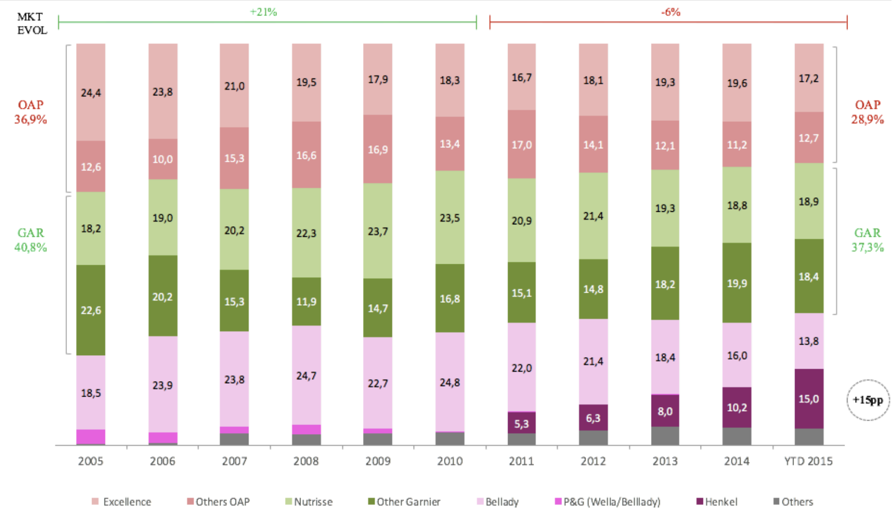
Search ad: type of contextual advertising where the the company pays to have their links in the top position (above the organic links conveyed by the search engine).

Search Engine Optimization: techniques to make a link rank higher in the organic search provided by the search engines (e.g. Google).

Word of Mouth: social interactions that promote the product/brand/company (marketing method).

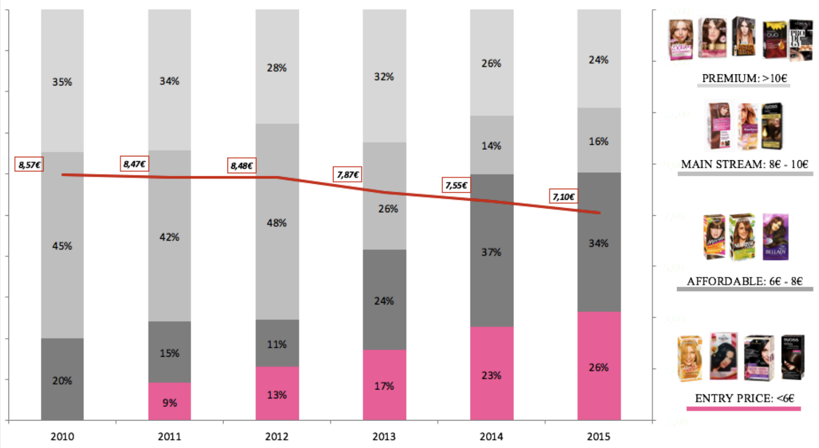
6. Appendix

Exhibit 1. Hair coloration market in Portugal



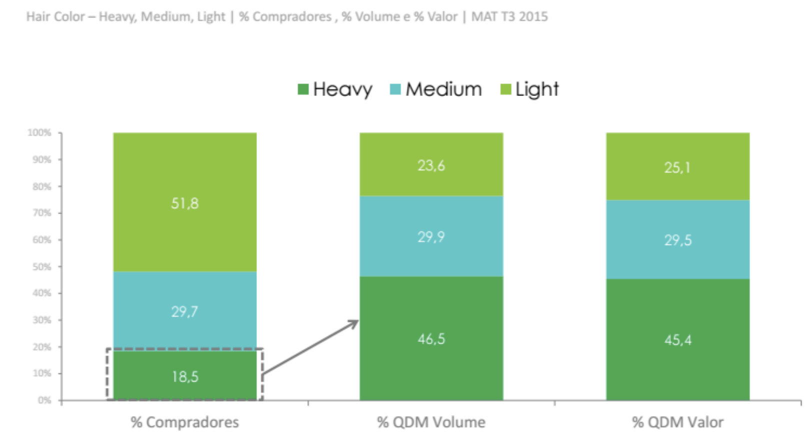
Source: NIELSEN PDM VALUE 2005/2015 – PORTUGAL IND

Exhibit 2. Entry Price –fastest growing segment



Source: Nielsen, H+S, Value – Avg. Price Value/Volume, 2010 – YTD15

Exhibit 3. Hair coloration users in Portugal



Source: Kantar Worldpanel

Exhibit 4. In-depth Interviews Script

Target: L'Oréal and competitors' home users (light, medium and heavy users) + non users; Age groups: 18-24; 25-55; 55+

Warm-up:
"Good morning/afternoon, my name is ________ and I'm currently doing my masters thesis in a group of 4 students at Nova SBE. I would like to thank you for your time and availability. We are conducting a research regarding the hair coloration market in Portugal and therefore, we would like to know your opinion, thoughts any experience. Keep in mind there is no right or wrong answers and feel free to discuss with each other and go beyond the question providing supplementary information, when you feel is relevant. You're free to say anything that comes to your mind to any of these questions.
If you don't mind, the interview will be recorded for more accurate analysis afterwards. We remind you that it will be confidential."

USERS SCRIPT
Let's start with a broad question. Can you tell me the last time you dyed your hair at home?
(were you satisfied with the outcome? did you do it by yourself or have any help? which brand and color did you use?)

Topics:

Perceptions:
What does it mean for you the hair coloration?
What are the reasons you dyed your hair?
Do you always buy the same reference color and brand?
Are there any issues of fears you have experienced in hair coloring at home?
What would help you to overcome those issues/fears?

Purchase Behavior:
Do you normally buy your hair color products? If yes, where? (supermarket, professional stores, channel...)
If you want to buy a hair color in a supermarket, where do you look for it? Can you find it easily? (point of purchase influences)
Where do you expect to find the hair color category in a supermarket? Next to some specific categories or isolated? (easiness of finding products)
When you go to a supermarket to buy a hair color product, where do you normally find it?
Have you ever bought a hair color product for someone else? (Mother, grandmother, friend,...) Do you think it is possible to do it or it is an exclusive self-purchase?
Which factors influence your purchase? price, brand, color, recommendation …. And what is the most important factor?

Shopping experience:
Do you always find 'your color'? What do you do when you don't find it?
Are you willing to change your color if you don't find it in the store?
Do you consider yourself a brand loyal consumer? or e.g. is there isn't 'your color' on shelf you go for any other brand?
(PUT IN THE TABLE SOME PRODUCTS)
Which information do you expect the packaging to provide? What do you look for in the packaging?
Is there anything confusing to you in the packaging? How would you change it?
What is your perception about the color coding? do you understand it? (ask about the point something e.g. 7.56)

Brand Perception & Brand Offer
Which hair color brands do you know? Which one(s) do you prefer?
Is there any that you would recommend? Any that you would recommend against?
Have you ever had any bad experience with a brand? or did you hear bad experiences of others?

Media consumption: (will give insight about communication)
Do you follow your brand(s) in social media?
Do you follow any blog related to hair colorations? Tutorial pages? How much time do you spend?
How do you keep updated about new trends/events regarding hair coloration (TV, websites, social media)? In total how many hours do you think you spend on TV, websites, social media,... checking info regarding hair coloration)?

NON-USERS SCRIPT
Let's start with a broad question. Can you tell me about the last time you were considering using some sort of coloration product?

Topics:

Purchase Behavior:
What kind of products did you consider buying already? What were your reasons? And why did you quit the idea?
Are you considering to color your hair anytime in a near future? Why not?/Why so? Why in the future and not now?
How do you perceive people who color their hair? What do you think are the reason why people (maybe family, friends) choose to color their hair?
Under which circumstances would you start coloring your hair? *(example of answer we would like: gray hair, bored with my current color, if it would be easier, if it wouldn't be permanent, etc.)*
What color would you choose?
Would you consult someone (friend, family, specialist, hair dresser?)
What are the issues or your fears you see in hair coloring at home?

What would help you to overcome those issues/fears?
If you wanted to buy a hair color in a supermarket, do you know where to look for it?
Have you ever bought a hair color product for someone else? (Mother, grandmother, friend,...) Do you think it is possible to do it or it is an exclusive self-purchase?
Which factors do you think influence any hair color purchase? price, brand, color,...

Brand Perception & Brand Offer
Which hair coloration brands do you can you name? (brand recall: 1st - top of mind)

Shopping experience:
(PUT IN THE TABLE SOME PRODUCTS)
Which one(s) would you prefer to use? Why?
Which information do you expect should be provided on the packaging?
Is there anything confusing to you in the packaging? How would you change it?
What is your perception about the color coding? do you understand it? (ask about the point something e.g. 7.56)
Do you like the packaging? Anything you would change? (to be more appealing to you and maybe lead you to try)

(SHOW PICTURES FROM STORES)
Do you like the packaging of hair color in general? Which packaging do you prefer/which one would you pick? why?
In the stores do you do anything special to find out which product would you buy? (e.g. opening boxes to check if it's full?)

Media consumption:
Do you follow any blog related to hair colorations/hair in general? Tutorial pages? How much time do you spend?
How do you keep updated about new trends/events regarding hair coloration (TV, websites, social media)? In total how many hours do you think you spend on TV, websites, social media,... checking info regarding hair coloration)?

Projective Technique
For your what would be a typical person that colors their hair?
For this specific brand (a brand mentioned in Brand Perception & Brand Offer), which person would it be like? (lifestyle,...)
(understand positive or negative perceptions about hair coloration)

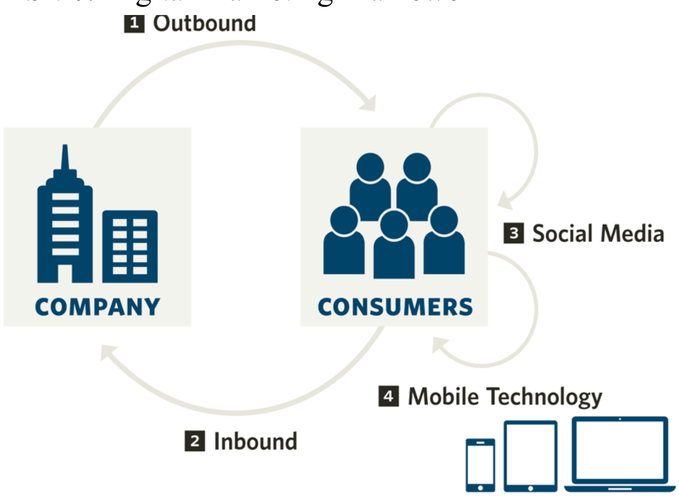
Exhibit 5. Interviewees

Age group	Users	Non-Users
18 - 25	7	4
26 - 55	3	1
55 +	2	2
Total	12	7

Heavy users	4
Medium users	4
Light users	4

Exhibit 6. Main in-depth interviews main insights

Exhibit 7. Digital Marketing Framework



Source: Gupta, S., & Davin, J. (july 31, 2015). Digital Marketing - Harvard Business Publishing

Exhibit 8. Consumer Decision Journey

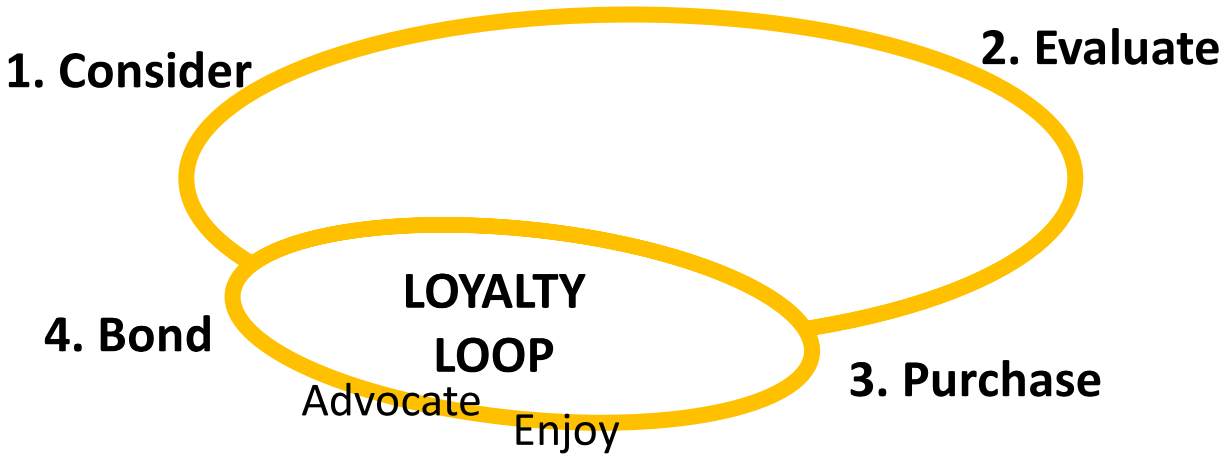
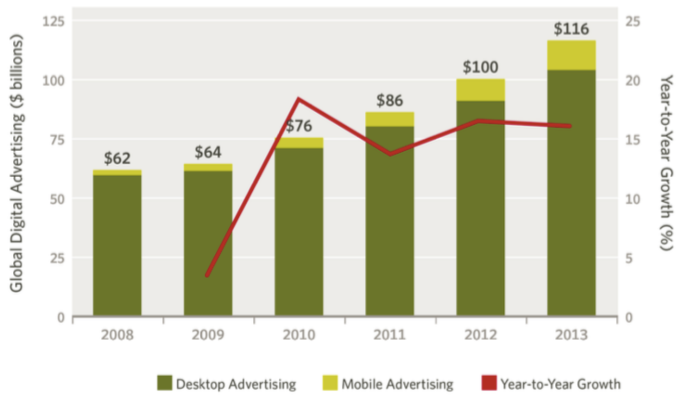


Exhibit 9. Growth in global digital advertising



Source: Mary Meeker, "Internet Trends 2014—Code Conference," May 28, 2014, http://s3.amazonaws.com/kpcbweb/files/85/Internet_Trends_2014_vFINAL_-_05_28_14-_PDF.pdf?1401286773, accessed January 21, 2015. Data from PWC Global Entertainment and Media Outlook, 2013. Reprinted by permission of Kleiner, Perkins, Caufield and Byers.

Exhibit 10. Media investment in Portugal 2015

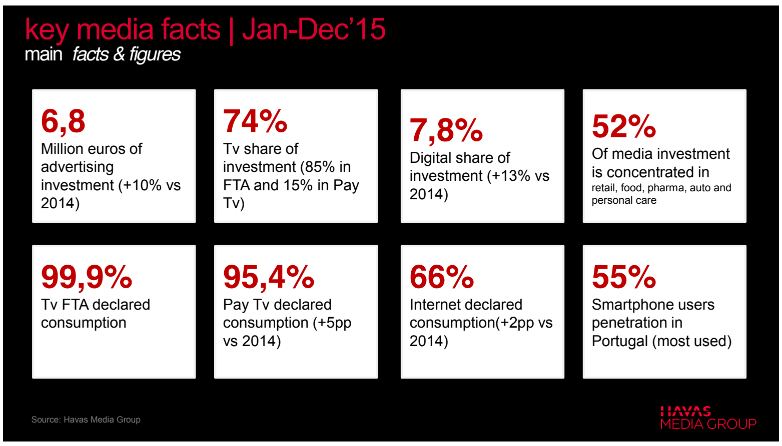
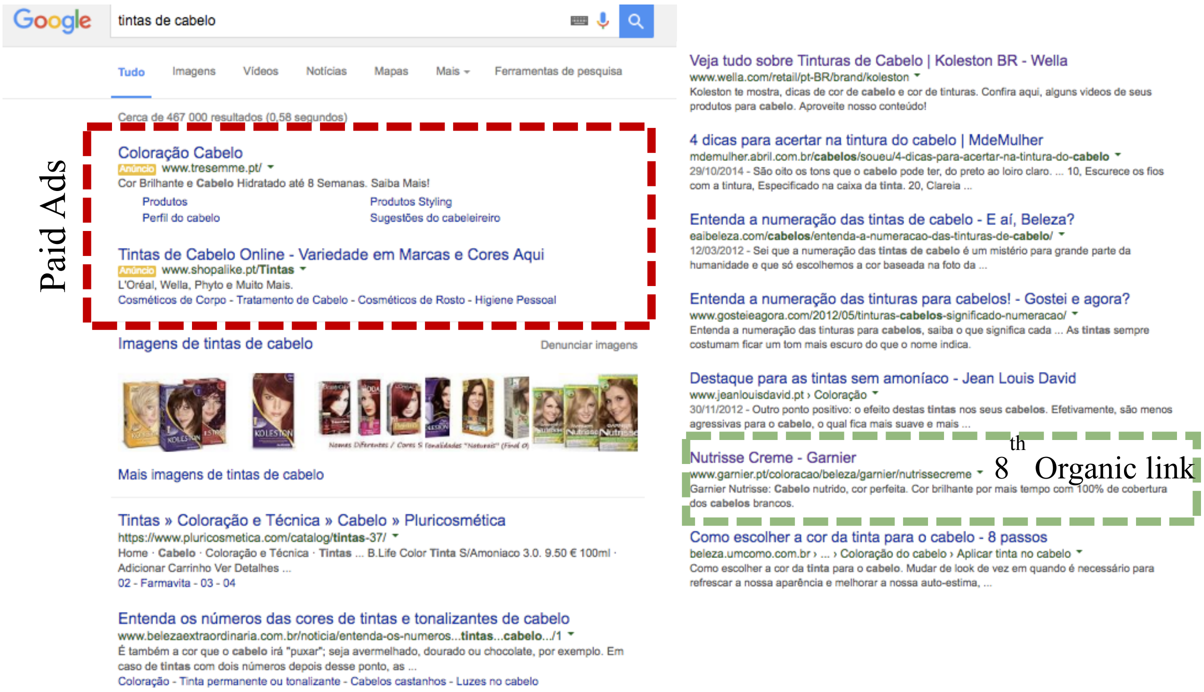
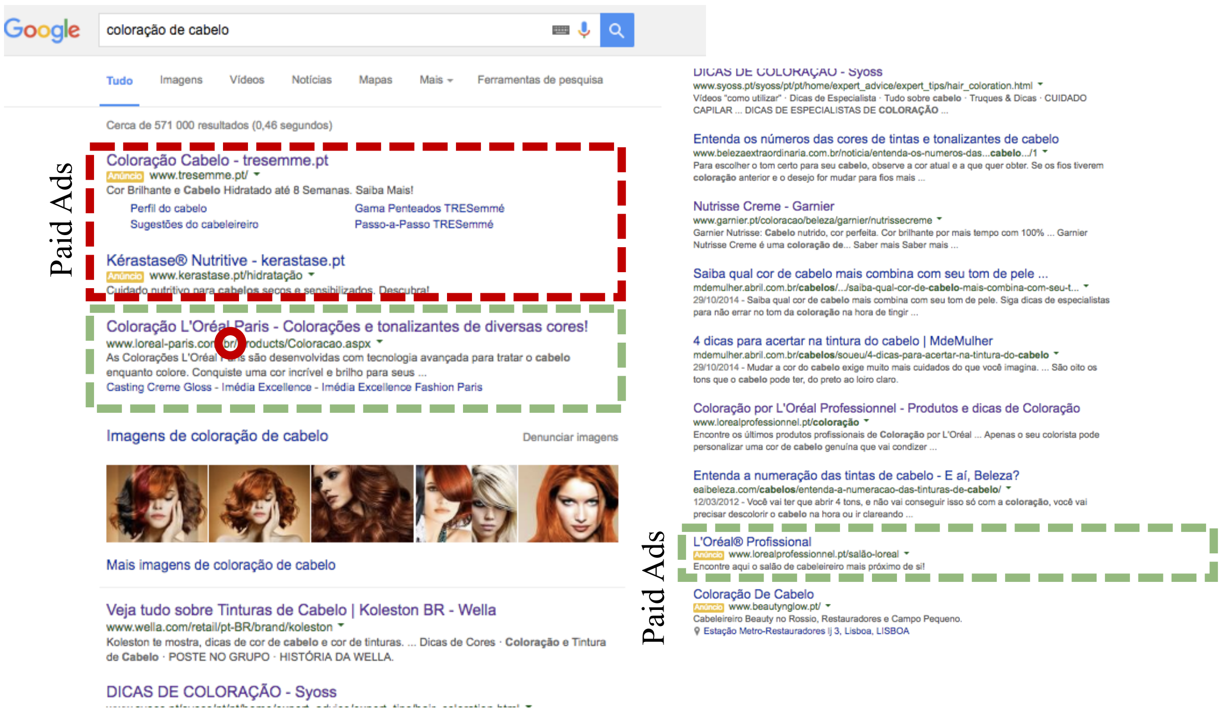


Exhibit 11. Paid ads and Organic links





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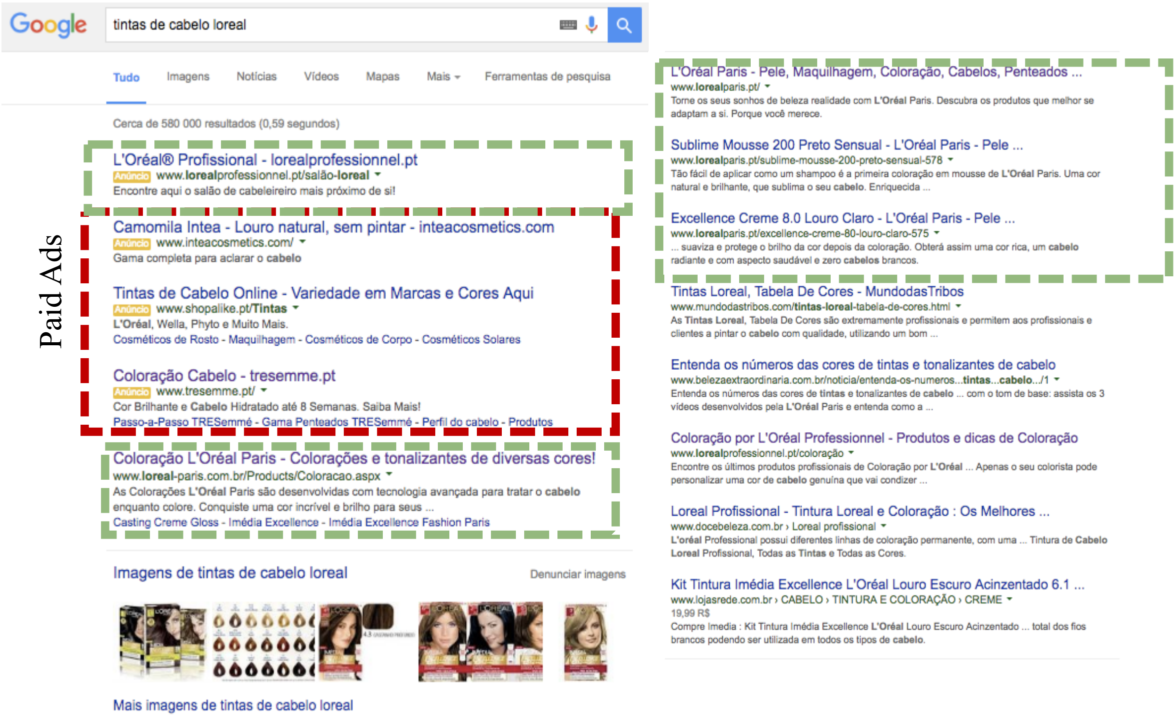
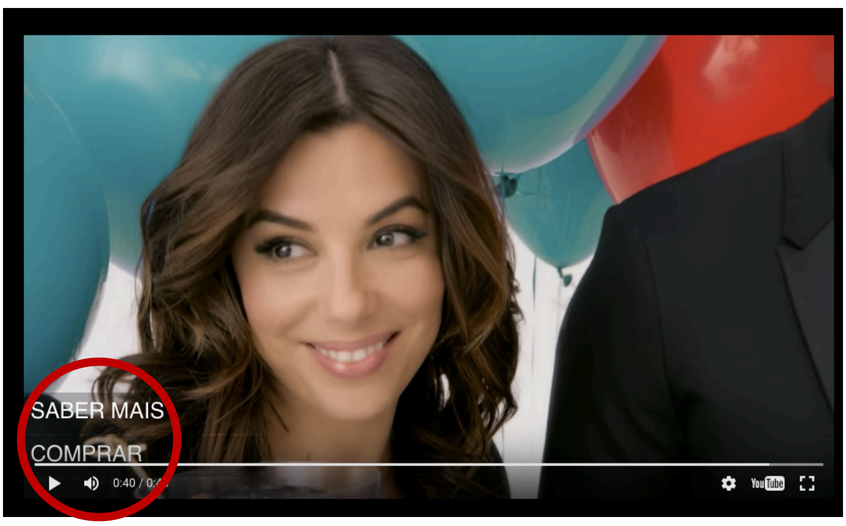


Exhibit 12. Inbound Marketing Steps

Source: HubSpot, "The Inbound Methodology," http://www.hubspot.com/inbound-marketing, accessed October 25, 2014. Reprinted by permission.

Exhibit 13 .Magic Retouch campaign – YouTube videos



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