



Case Study: Procter & Gamble

The Latino consumer: An Emerging Middle Class in the U.S.

The emerging middle class among developing countries is a megatrend that is significantly impacting how major global consumer goods companies are pursuing growth. However, there's actually a dynamic emerging middle class here in the U.S.

Traditionally, marketers have primarily segmented U.S. Latinos as lower income. But in fact, the 52 million Latino population represents both the fastest growing and largest emerging middle class in the U.S.

According to a recent report by Nielsen, "U.S. Latino households that earn \$50,000 or more are growing at a faster rate than total U.S. households." Further, the Nielsen report stated, "Based on above average consumption of many consumer products and their continued demographic growth, Hispanics will be the dominant and in many cases the only driver of domestic CPG sales growth."

+Source: Nielsen Q4, 2011 Mobile Hispanic Insights Report

Latinos and P&G

The U.S. Latino population is projected to grow by 50% by 2015 to represent \$1.5 trillion in buying power – a huge opportunity for consumer goods companies like Procter & Gamble.

Given the opportunity Latinos represent, the P&G U.S. Hair care team wanted actionable insights from Latina consumers to develop retail products that resonate.

This had proved challenging in the past, as P&G had difficulty recruiting Latino research participants who were properly screened for ethnicity. The hypothesis was that Latino sample is often recruited from general market sources, with scant verification of the acculturation levels characterizing this demographic.

P&G also wanted to explore qualitative research methodology that integrates real time mobile feedback, to dig deeper into key moments of product usage and purchase decision.

Why Qualitative + Mobile for Latinos

As the value of community is particularly important to Latinos, it makes sense for researchers to engage with them as fellow community members through a qualitative platform. And at 57%, Latino smartphone penetration is higher than the general population. In fact, Latinos are 28% more likely to own a smartphone than non-Latino whites. They outpace all ethnic groups in mobile data consumption including music and picture downloads. Indeed for many Latinos, their mobile device is their sole communication tool.

Enter SusOpiniones Ping

In response, SusOpiniones and Revelation Global teamed to develop SusOpiniones Ping, offering targeted access to Latino consumers combined with an immersive online and mobile research platform.

The SusOpiniones panel is recruited strictly from Spanish and bilingual sources and member referral. The Revelation Immersive Research platform is a unique web and mobile qualitative tool enabling communication with a targeted group of consumers as trusted peers in an online community setting.

With SusOpiniones Ping, P&G was able to observe and learn from Latinos and get deep, in-the-moment insights and serious answers to business problems.

The Study: Pelo = Hair

In a 3-day qualitative study with twenty selectively recruited Latinas, the P&G Hair Care team used SusOpiniones Ping to conduct fun, creative activities designed to understand hair care trends.

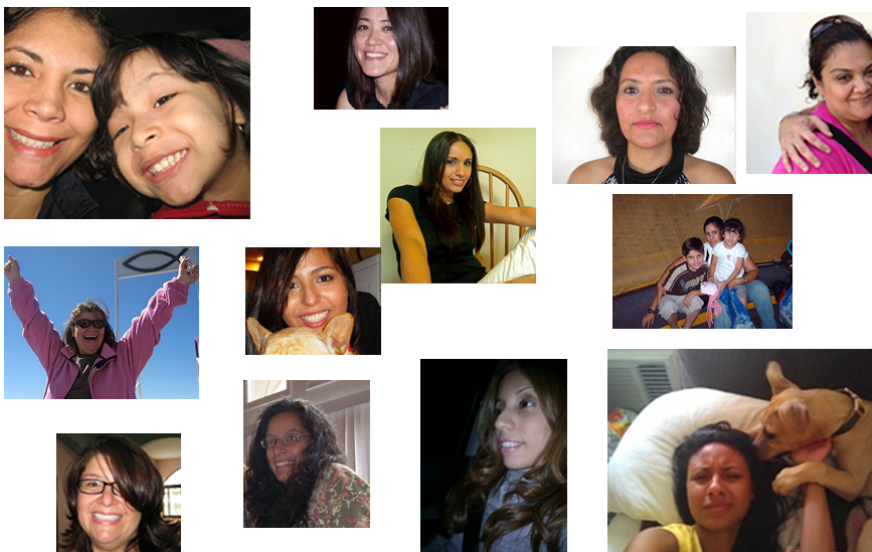
Participant Snapshot: There is no one Latina consumer

Given P&G's research objectives, SusOpiniones participants were screened for several characteristics, including acculturation level, country of origin and language preference. P&G also wanted a mix of countries of origin to reflect the regional cultural subtleties among the Latino market.

The participants were Boomers, Generation X'ers and Millennials. They were born in Argentina, Colombia, Cuba, Mexico, Peru, Puerto Rico, and the USA.

They live in Arizona, California, Colorado, Florida, Maryland, New Mexico, North Carolina, Ohio, Texas and Virginia. 70% use an Android smart phone and 30% an iPhone. 62% are completely bilingual, 25% prefer Spanish, and 13% prefer English.

The women were prescreened, invited to participate, and asked to download the Revelation mobile app to their smartphones. Meet the panel.



Participant-uploaded profile images

Methodology: A Community of Peers

Over the course of the three days, the participants took shopping trips and snapped photos of beauty products that caught their attention. They uploaded these photos and answered P & G moderator Laura Bryant's questions about the purchase motivators via the Revelation mobile app.

The participants could access and comment on each other's activity input. This enabled the moderator to probe ideas further, exposing hair care trends that may not have been apparent through a single post.

"I absolutely feel that there was a level of intimacy and trust that resulted in a peer-to-peer dialogue" – Laura Bryant, Hair Care Team Moderator, P&G

Day 1 began with the participants logging on to the Revelation online platform for instructions. Thereafter, they could alternatively complete all of the activities via the Revelation mobile app.

On Day 2, the participants performed exercises designed to express their individual concepts of health and beauty. Using text and uploaded images, they were asked to use analogies and metaphors incorporating their five senses. This provided a rich tapestry of what both healthy and unhealthy hair means to them.

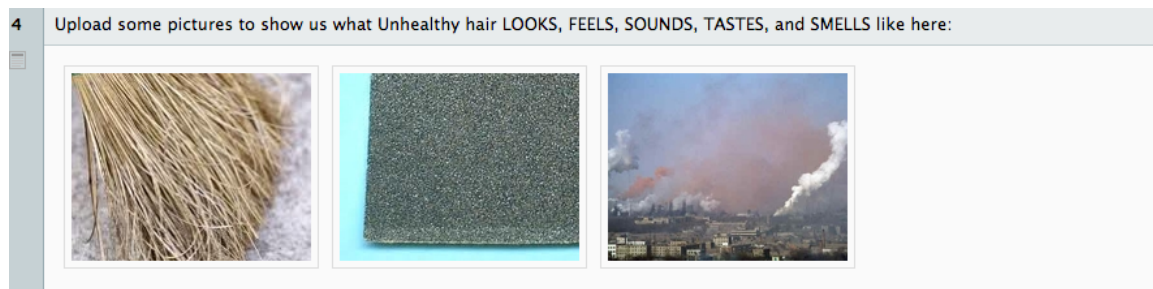


Image matrix of participant uploads

They wrote a story from the point of view of their hair: “If your hair could talk”. Stories included angry, grateful, and wise heads of hair. Finally, they pretended to be a beauty editor of a fashion magazine, selecting an existing hair care product containing natural ingredients worthy of an award.

On Day 3, the participants were asked to create their ideal hair care regimen, describing product package designs, names, ingredients and usage instructions - then articulate what benefits their hair would receive from them.



Real time, in-store shopping moments via the Revelation mobile app

*“We got real time learning results from mobile.” – Jill Bos,
Senior Scientist, P&G*

Spanglish: Using language as a research tool

Although P&G chose to conduct the study in English, all of the participants were bilingual native Spanish speakers. P&G moderator Laura Bryant encouraged them to express themselves in whatever language seemed intuitive for the activities at hand. The results were a rich expression of the U.S. Latina consumer, who typically lives seamlessly in both Spanish and English culture.

as a child i had straight hair but one time in school i got the bugs and they cut it short (boy short) since then for too many years i had my hair like that plus i was a swimmer so it was ll good despues cuando me converti en madre comense a crescer mi pelo pero se me hiso wavy y se me acolocho (curly) ahora lo tengo

A Participant's candid description of her hair, expressed in both English and Spanish.

"Incorporating Spanish comments added to the authenticity of the research/comfort levels of participants." – Jill Bos, Senior Scientist, P&G



Revelation Word Cloud incorporating both Spanish and English.

Intuitive Research Tools: They matter to the consumer

The Revelation platform and smartphone app were truly intuitive tools for the participants. In a post-study survey, 100% found the study “easy to understand”, would participate in the future and recommend the experience to friends and family. Additionally, 80% expressed interest in participating in SusPing studies as a family panel.

Cultural perspective gained

Through this research P&G was able to quickly gain cultural perspective on hair care and treatments. The team was able to confirm several hypotheses as well as develop a host of new learnings regarding Latino hair care traditions – all within three days.



Connecting the dots with Revelation Word Tree

About SusOpiniones

SusOpiniones is a U.S. Latino market research panel and community of members uniquely recruited through Spanish language and bilingual media. The SusOpiniones web portal, Daily Poll and Facebook page provide our community touch points.

About Revelation Global

Revelation's Immersive Research platform fuses today's web and mobile technology with proven traditional research methods. The result is engaging research activities that provide a 360-degree view of consumer experiences.

About SusOpiniones Ping

Now SusPing combines the SusOpiniones panel and Revelation Research platform to give marketers and researchers in the moment access to the Latino consumer.

Want to learn more about SusOpiniones Ping?

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