

LUISS



Master Degree Program in Marketing

Chair of Sustainability for Marketing

Sustainable consumption in the hair salon industry: an empirical study on consumer perceptions of premium Kao's Kerasilk products.

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Dedication

To my beloved husband and family, your endless support and love have been the cornerstone of this journey.

Abstract

This project aims to analyze the interaction between sustainability and consumer behavior within the hair care market, particularly for Kao Kerasilk premium products. Based on the SHIFT Model (White et al., 2019) and with a quantitative approach, the study aims to verify if and which of the drivers identified in the model can increase the willingness to pay for Kerasilk users and non-users. The study will examine the differences between the two groups and propose strategic recommendations for future research.

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Introduction

Recently, the global beauty and personal care industry has experienced a significant transformation towards sustainability, driven by changing consumer preferences and increased awareness of environmental and social issues¹. According to NielsenIQ's 2023 Sustainable Beauty report, 62% of consumers consider sustainability more important than two years ago.²

This shift reflects a wider commitment not only to clean beauty standards but also to reduce environmental impact. Consumers are now more focused on sustainable packaging, including refillable options, as well as avoiding harmful ingredients.

The hair-care industry plays a crucial role in this change. The industry's substantial market presence and environmental impact—especially due to high water consumption in both production and usage—make it an important area of study. Unlike professional products and salon services, which are not included in this market, consumer-facing hair-care products are increasingly seen from the point of view of sustainability.

Hair care, valued \$90 billion in 2022³, is evolving thanks to trends such as the “premiumisation”⁴ and “skinification”⁵ of hair, with consumers looking for more specialized products and multi-step routines. Since sustainability reshapes the beauty world, brands are responding with innovations such as water-saving techniques, eco-friendly packaging, and transparent ingredient sourcing. These efforts reflect a turn towards a more responsible beauty consumption.

¹ Jorge Zuniga, *Unlocking Sustainability Opportunities in Beauty and Personal Care*, 2024, <https://www.euromonitor.com/article/unlocking-sustainability-opportunities-in-beauty-and-personal-care>

² NIQ, *Trends in Sustainable Beauty, 2023*, <https://nielseniq.com/global/en/insights/analysis/2023/trends-in-sustainable-beauty-2023/>

³ BOF, *The Beauty Market in 2023: A Special State of Fashion Report*, The Business of Fashion and McKinsey & Company, May 2023

⁴ It refers to the trend of consumers trading up to more expensive or higher-quality products that offer better performance or additional benefits (from BOF, *The Beauty Market in 2023: A Special State of Fashion Report*, The Business of Fashion and McKinsey & Company, May 2023)

⁵ It refers to the adoption of multi-step skincare routines for hair care, where consumers treat hair with specialized products similar to those used for skincare, such as serums, oils, and scalp treatments (from BOF, *The Beauty Market in 2023: A Special State of Fashion Report*, The Business of Fashion and McKinsey & Company, May 2023)

This evolution underlines the potential of the hair-care sector to contribute significantly to the beauty industry overall sustainability goals.

The decision to focus on the hair-care sector comes from its significant growth potential and the need for sustainable innovation. As consumers demand more eco-friendly options, this sector offers a huge opportunity to explore how brands are adapting to these new preferences.

An example of this shift is Kao Group with their relaunch of Kerasilk hair-care line as an independent brand. Kao, a major player in beauty industry, has shown a strong commitment to sustainability. The company has set ambitious goals to achieve zero emissions by 2040 and become carbon neutral by 2030⁶. Kao sustainability strategy involves reducing greenhouse gas emissions, saving water, and using energy-efficient processes. The company is also focusing on developing products with sustainable ingredients and packaging.

The new Kerasilk line includes vegan formulations and sustainable packaging solutions and has got the PETA⁷ certification for being cruelty-free. This move meets the growing consumer demand for environmentally friendly and ethically produced hair-care products.

This thesis will explore several key aspects of sustainability in the hair-care industry, focusing on Kao Kerasilk products. The research will examine:

1. **Consumer Attitudes and Behavior about sustainability consumption:** How changes in consumer attitudes towards sustainable hair care products affect their purchasing decisions.
2. **The SHIFT Model (White et al., 2019):** Analyzing which elements of the SHIFT model—Social influence, Habit formation, Individual Self, Feelings and Cognition, and Tangibility—impact consumers' willingness to pay for Kerasilk products⁸.

⁶ *Kao Sustainability Report 2024*, <https://www.kao.com/content/dam/sites/kao/www-kao-com/global/en/sustainability/pdf/sustainability2024-e-all.pdf>

⁷ Acronymous for "People for the Ethical Treatment of Animals"

⁸ Rollinson, A. *Sustainability and Social Purpose in Hair Care*, 2021, <https://www.euromonitor.com/article/sustainability-and-social-purpose-in-hair-care>

3. **Strategies:** Identifying effective ways to communicate sustainability efforts and align with consumer expectations.

By exploring these aspects, the study aims at providing useful insights into consumers' behavior and the effectiveness of sustainability initiatives in the hair-care industry. The aim is to analyze the leverage of the SHIFT Model (White et al., 2019) that can affect the willingness to pay both for consumers that are users and non-users. The findings will offer strategic recommendations for the brands trying to comply with evolving consumer values and advance sustainability in their product offerings.

The thesis is organized as follows: chapter 1 presents a review of the literature, focusing on cosmetic regulations, sustainable consumption, consumer behavior, and sustainability in the beauty industry. Chapter 2 provides an overview of the hair care market, with a particular focus on sustainability in the hair salon industry. Chapter 3 provides details on the Japanese company, Kao, with a focus on its sustainability initiatives and the relaunch of the vegan Kerasilk products.

Chapter 4 presents the methodology, including data collection and analysis, and chapter 5 offers recommendations and discusses implications.

The conclusion provides key findings and proposes areas for future research.

Chapter I – Literature Review

1.1 Cosmetics and regulations

The new European Union Regulation 1223/2009, which replaced Directive 76/768/EC of 1976, is the fundamental legislative framework supervising the cosmetic industry within the European Union. This regulation provides a complete system to ensure that cosmetic products are safe for consumers and meet high quality standards. According to this framework, manufacturers need to release a complete product safety report before their products are introduced into the market.

The regulation also introduced the EU Cosmetic Products Notification Portal (CPNP), a new centralized system to facilitate the submission and tracking of product information across all member states.

The regulation stipulates that national authorities must be consulted for any serious undesirable effects (SUE) associated with a cosmetic product. Reports are then shared with other EU countries to ensure a common approach to monitoring and managing product safety.

Regulation (EC) N° 1223/2009 also provides guidelines for the use of nanomaterials in cosmetics, which must meet high safety standards: these materials must be authorized and labeled to inform both consumers, who can be made aware of the product's ingredients, and regulatory authorities of their presence. During the past years, the regulation has been updated several times to include new scientific evidence and to demonstrate the EU's dedication to aligning its framework with the latest scientific and technological advancements, ensuring that cosmetic products are safe and well-regulated⁹.

1.2 Greenwashing and misleading sustainability claims

This continuous update demonstrates the EU's dedication to aligning its framework with the latest scientific knowledge and technological developments, ensuring that cosmetic products are safe, effective, and well-regulated. Greenwashing has become a key issue as many companies use environmental claims to attract consumers who care about sustainability. According to the Deputy Director of the European Consumer Organisation, Ursula Pachl, greenwashing stands for making false claims about a product's

⁹ https://single-market-economy.ec.europa.eu/sectors/cosmetics/legislation_en

environmental benefits: words like "eco-friendly" or "climate neutral" can often be used without any real evidence to confirm them¹⁰. In January 17 2024, European Parliament released a new directive whose goal is to contrast greenwashing and improve the labelling of products. The above-mentioned adjectives will be prevented from being used unless they are proved to be real.

The directive introduces more rigid regulations on eco-labels: only labels coming from recognized certification entities or public authorities will be allowed. EU member states will have to indicate an authority to check on these labels, ensuring they comply with official standards. Their aim is to reduce misleadings and ensure that labels reflect the product commitment to reduce environmental impact [Fig.1].



Figure 1 - Source: Akepa

The new law also contrasts the claims based only on the compensation of emissions. Products can't be marketed as environmentally neutral or with a reduced impact just because a company takes part in offsetting schemes. This regulation makes sure that companies focus on making real changes rather than relying on offsetting in order to appear more sustainable. The new directive is designed to cause important changes that involve both businesses and consumers: for companies, it will mean revising how they

¹⁰ Sara George, *EU Parliament signs off on anti-greenwashing legislation*, 2024 <https://www.edie.net/eu-parliament-signs-off-on-anti-greenwashing-legislation/>

market their products and ensuring that their environmental-friendly claims are supported by sound evidence; for consumers, the law is supposed to provide clearer and more reliable information, helping them make better-informed decisions. The legislation aims at raising trust in sustainability claims and support more responsible purchasing choice by eliminating general and unverified claims, the legislation aims at raising trust in sustainability claims and support more responsible purchasing choice¹¹.

1.3 Definition of sustainability

The United Nations Brundtland Commission, in 1987, defines sustainability as the capacity of both natural and human systems to endure over time without compromising the health of ecosystems or the well-being of future generations¹². The concept has traditionally been understood in broad terms, often lacking specific metrics or guidelines for assessing environmental impact. However, a more precise approach, termed "absolute sustainability,"¹³ addresses this gap. Anjila Hjalsted, in her TEDx talk, argues that the common use of the term "sustainability" is often too vague. Absolute sustainability offers a solution by establishing quantifiable limits to human activities based on the planet's finite resources. It revolves around the concept of ecological boundaries—scientifically derived thresholds that human activities must not surpass to avoid degrading Earth's life-support systems.

This framework, often referred to as the "planetary boundary framework," provides a measurable foundation for assessing sustainability. It ensures that human activities remain within safe operating limits, preventing irreversible environmental damage. Central to this concept are critical questions: How much environmental space do we have? And how should this space be allocated across generations to ensure future sustainability? Hjalsted emphasizes that sustainability must move beyond abstraction and become a binary, measurable concept. She advocates for establishing clear, actionable benchmarks—such as carbon footprints or water usage—to determine whether an activity is genuinely sustainable. This shift in perspective requires designing products, systems,

¹¹ Sara George, *EU Parliament signs off on anti-greenwashing legislation*, 2024 <https://www.edie.net/eu-parliament-signs-off-on-anti-greenwashing-legislation/>

¹² United Nations, *Sustainability*, <https://www.un.org/en/academic-impact/sustainability>

¹³ Hjalsted, A. (n.d.). TEDx Talk on Absolute Sustainability, 2022, <https://www.youtube.com/watch?v=B-dCmbViDEQ>

and policies that operate within these ecological limits. Therefore, absolute sustainability is not merely an ideal but a fundamental necessity for achieving long-term ecological balance and ensuring human survival.

Moreover, sustainability is a multifaceted concept, evolving to incorporate environmental, social, and economic dimensions. The most widely recognized definition comes from the World Commission on Environment and Development, which emphasizes meeting "the needs of the present without compromising the ability of future generations to meet their own needs" (WCED, 1987)¹⁴. This definition underscores the principle of intergenerational equity, highlighting our responsibility to preserve the planet for future generations.

According to the Sustainability Committee at the University of California, Los Angeles (UCLA), sustainability goes beyond simply conserving resources. It involves integrating environmental health, social equity, and economic vitality to build resilient and thriving communities¹⁵.

The urgency of achieving sustainability is clear, as pointed out by the US Environmental Protection Agency (EPA). Human well-being is inextricably linked to the health of the environment. With challenges like climate change, biodiversity loss, and resource depletion, the need for sustainable practices is critical not only for environmental health but also for the stability of global economies and societies.

1.4 Sustainability and consumer preferences

Recent data from the Capgemini Research Institute collected by Sustainability in Consumer Products and Retail Survey, April–May 2020 and published on *How sustainability is fundamentally changing consumer preferences*¹⁶, underscores a significant evolution in consumer preferences towards sustainability. The survey, which sampled 7,520 consumers, reveals that 79% of individuals now take into account the

¹⁴ World Commission on Environment and Development, *Report of the World Commission on Environment and Development: Our Common Future*, 1987, Oxford University Press, <https://sustainabledevelopment.un.org/content/documents/5987our-common-future.pdf>

¹⁵ UCLA, *What in Sustainability?*, <https://www.sustain.ucla.edu/what-is-sustainability/>

¹⁶ Capgemini, *How sustainability is fundamentally changing consumer preferences*, 2020 https://www.capgemini.com/wp-content/uploads/2020/07/20-06_9880_Sustainability-in-CPR_Final_Web-1.pdf

environmental and social impacts of products when making purchasing decisions. This shift reflects a growing awareness and concern about climate change, the depletion of natural resources, and social issues such as fair labor practices.

According to the research, younger generations, such as Millennials¹⁷ and Gen Z¹⁸, are especially committed to supporting sustainable brands and often feel a personal connection to companies that prioritize environmental responsibility.

The COVID-19 pandemic has reinforced this trend, as more consumers look for products that are locally sourced, safe, and eco-friendly. However, many consumers are not fully aware of the environmental consequences of their purchases, highlighting the need for businesses to better educate them about sustainability.

1.5 The SHIFT Model (White et al., 2019)¹⁹: a framework for sustainable consumer behavior

The SHIFT Model (White et al., 2019) gives a holistic framework to understand sustainable consumer behavior by mixing economic, social, psychological, and cultural factors. Conceived and developed by Katherine White and her team, it stretches beyond simple economic considerations to include personal values, beliefs, attitudes, behavioral intentions, external influences, and actual behavior. This comprehensive approach is valuable for policymakers, businesses, and educators aiming at designing effective strategies that support sustainable consumer choices.

The SHIFT Model (White et al., 2019) indicates five key areas that must be addressed to encourage sustainable consumption:

- **Social Influence:** One of the most significant factors influencing consumer behavior are social norms, marketing messages, and peer dynamics. The model underlines that consumers are highly responsive to the actions and opinions of others. By promoting positive social norms in relation to sustainability, businesses and campaigns can create an environment where sustainable choices are perceived not only as desirable but even expected. Social influence can show itself in several

¹⁷ A person born between the early 1980s and the mid-1990s, according to Treccani

¹⁸ The digital native generation, born between 1997 and 2012, according to Treccani.

¹⁹ K White, R. Habib, D. J. Hardisty, *How to SHIFT Consumer Behaviors to be More Sustainable: A Literature Review and Guiding Framework*, American Marketing Association, 2019

ways, from direct peer pressure to more subtle cues in advertising. The SHIFT Model (White et al., 2019) suggests leveraging these social forces to create a cultural movement towards sustainability, where eco-friendly choices become the norm rather than the exception. Studies have shown that when consumers believe their peers are adopting sustainable behaviors, they are more likely to follow them.

- **Habits:** Our everyday routines, often unconscious, have a strong impact on our environmental footprint. Habitual behaviors—such as using single-use plastics, relying on fossil fuel-based transportation, or choosing unsustainable food options—are often deeply rooted, turning out to be resistant to change. The SHIFT Model (White et al., 2019) places great importance on disrupting these unsustainable habits and replacing them with sustainable alternatives. It underlines the need for strategies that help consumers recognize their habitual behaviors and introduces interventions that make sustainable behaviors more convenient and habitual over time.
- **Individual Values and Self-Identity:** People's values and perception of themselves play a fundamental role in shaping their consumption choices. The SHIFT Model (White et al., 2019) suggests that connecting sustainability with core values—such as health, family, or environmental attention—can strongly motivate sustainable behaviors. Self-identity is another key component; when consumers see themselves as environmentally-conscious individuals, they are more likely to engage in behaviors that comply with that sense of identity. Brands that successfully make products compliant with the values and identities of their target audiences can create deeper connections and enhance loyalty from them.
- **Feelings and Cognitions:** Consumer decisions are often influenced by a combination of emotional and cognitive factors. Emotions such as fear, guilt, pride, or hope can significantly influence choices, a phenomenon particularly evident in the context of sustainability. The SHIFT Model (White et al., 2019) highlights the importance of relying on these emotional appeals when promoting sustainable products or behaviors. In addition to emotions, perceptions of

knowledge and competence play a role in decision-making. Consumers are more likely to choose sustainable options when they feel confident in their knowledge of environmental issues and the impact of their actions. Providing clear, accessible information about the environmental benefits of products or behaviors can enhance this sensation and encourage sustainable choices.

- **Tangibility:** The ease and visibility of sustainable options play a fundamental role in their adoption. The SHIFT Model (White et al., 2019) considers that consumers are more likely to engage in sustainable behaviors when the options are convenient, accessible, and clearly differentiated from less sustainable alternatives. This tangibility can be boosted by making sustainable products more visually appealing, easier to find in stores, or better integrated into everyday life. Additionally, providing consumers with feedback on the benefits of their sustainable actions can reinforce the desirability of these behaviors. This is particularly important in overcoming the perception that individual actions are too small to make a difference.

By analyzing these factors, the SHIFT Model (White et al., 2019) offers an insight into how individuals carry out their decision-making process when opting for environmentally friendly purchases.

Recognizing the pivotal role of personal values and beliefs in shaping consumer behavior, the SHIFT Model (White et al., 2019) highlights the significance of understanding consumers' motivations in the context of sustainability. With consumers increasingly prioritizing sustainability, businesses must embrace these values so as to effectively communicate the advantages of their sustainable products.

Furthermore, the model recognizes the impact of external factors like social norms and marketing messages on consumer attitudes and behaviors. In my thesis project, this aspect of the model is particularly relevant for investigating how marketing strategies and environmental messaging influence consumers' perceptions without modifying the original text.

1.6 Hair care market definition

Hair care involves practices and products designed to keep hair healthy, clean, and looking its best. According to Statista, the hair-care market includes items like shampoos, post-shampoo treatments, hair coloring products and styling products. Different cultures and hair types influence different hair care routines.

Cosmetica Italia provides a comprehensive overview of the hair care product market. According to *Cosmetica Italia*, with the 46.8% shampoos are the core product of the hair care routine²⁰.

Post-shampoo treatments, including conditioners, masks, and serums, are also vital. These products restore moisture, repair damage, and shield hair from environmental stress. During the pandemic, there was a huge increase in the use of deep-conditioning treatments as consumers tried to maintain their hair health at home.

Hair-coloring products are another key segment, especially in professional salons. While sales of at-home dye kits rose during the pandemic, professional color services won back importance thanks to the reopening of salons. In fact, hair coloring services were among the most resilient during the pandemic, with demand rising quickly after restrictions were lifted.

Styling products, including gels, mousses, sprays, and waxes, have also seen a new rise. As social activities and events resumed post-pandemic, consumers showed renewed interest in these products, which they wanted to experiment with different styles. Developments in formulations have enhanced their appeal offering longer-lasting hold and added benefits like heat protection and anti-frizz properties.

1.7 The Impact of Sustainability on Consumer Behavior: Insights for the Global Hair Care Market

Sustainability has risen as a significant factor in consumer behavior, particularly within the hair-care industry, as more individuals prioritize products that comply with environmental and social values. A 2023 study by McKinsey and NielsenIQ²¹ highlights this shift, revealing that products with environmental, social, and governance (ESG)

²⁰ *Cosmetica Italia, 56th Annual Report of the Italian Cosmetics Industry, 2024*, <https://www.cosmeticaitalia.it/export/sites/default/centro-studi/rapporto-annuale/Annual-Report-2024.pdf>

²¹ McKinsey & NielsenIQ, *Consumers care about sustainability—and back it up with their wallets*. McKinsey Insights, 2023

claims experienced a cumulative growth of 28% over a five-year period, compared to 20% of products without their same claims. Notably, ESG-related products accounted for 56% of overall retail growth across categories, including personal care, where sustainability-driven purchases have been especially prominent. The study also found out that less common ESG claims, such as "vegan" or "carbon zero," generated an 8.5% higher growth rate than products without these claims, indicating that unique sustainability features resonate strongly with consumers. Furthermore, brands with a higher percentage of sales from ESG-labelled products boasted repeated purchase rates of 32-34%, demonstrating that sustainability fosters consumer loyalty. The study provides evidence that consumers are not only stating their preference for sustainable products but are actively backing these preferences with their purchasing choices.

Chapter II – Hair Care Market Overview

According to the report *Market Reports World 2024*²², in recent years, the hair care market has undergone significant changes, shaped by the dual impact of the COVID-19 pandemic and the ongoing Russia-Ukraine conflict. These events have posed challenges to both production and distribution, but the market has shown resilience, with promising growth expected in the years ahead. The global hair care market is projected to grow steadily through 2031, largely driven by increasing consumer interest in sustainability and innovative products. According to the report, the pandemic caused considerable disruption in the hair care industry, especially affecting professional salon services, as salons were forced to close during lockdowns. As a result, many consumers turned to at-home solutions, increasing demand for products like hair dye kits and conditioning treatments. This shift helped retail sales in the hair care sector, as consumers sought to maintain their hair care routines despite the closure of professional services.

By 2023, as pandemic-related restrictions eased, the market began to recover. In Italy, for example, the hair care segment grew by 7.3%, reaching a value of €1,028 million. This growth was partly due to the reopening of salons and consumers' renewed confidence in professional treatments.²³ As professional services resumed, many consumers sought out specialized care to address hair damage caused by frequent washing, home treatments, or neglect during lockdown periods.

In addition to the pandemic, the Russia-Ukraine war has further disrupted the hair care market. The conflict has led to economic instability, particularly in Europe, affecting consumer spending in affected regions. Furthermore, the war has interrupted the supply of raw materials and increased energy prices, which in turn have raised production costs for hair care manufacturers²⁴.

²² Market Reports World, *Hair Care Market Segmentation 2024-2031: Size, Share, Growth Rate, Trend, and Key Players Overview*, 2024

²³ Cosmetica Italia, *56th Annual Report of the Italian Cosmetics Industry*, 2024, <https://www.cosmeticaitalia.it/export/sites/default/centro-studi/rapporto-annuale/Annual-Report-2024.pdf>

²⁴ Market Reports World, *Hair Care Market Segmentation 2024-2031: Size, Share, Growth Rate, Trend, and Key Players Overview*, 2024

Despite these challenges, the hair care market has remained resilient. Many large companies with global operations have been able to mitigate some of the disruptions by leveraging their financial strength and diverse supply chains. In Italy, for instance, the hair care industry has continued to grow, with exports rising by over 20% in 2023²⁵. The market's essential nature, combined with the ability of manufacturers to adapt, has helped maintain growth even in uncertain economic conditions.

2.1 Sustainability Consumption in the Hair Salon Industry

The hair care industry is undergoing a significant transformation, driven by a growing emphasis on sustainability. Consumers are increasingly seeking eco-friendly products and services, prompting industry players to adapt and prioritize responsible practices. While a focus on minimizing energy consumption and chemical use is certainly crucial, a new frontier in sustainability is emerging – the role of salons in influencing consumer behavior. Hair salons occupy a unique space within the industry. Stylists develop close relationships with their clients, fostering a sense of trust and familiarity. This ongoing dialogue presents a valuable opportunity for education and advocacy around sustainable hair care practices. Unlike impersonal marketing messages, stylists can tailor their recommendations to individual needs and hair types, ensuring credibility and fostering a genuine shift towards eco-friendly choices.

Research by Dr. Denise Baden at the University of Southampton Business School²⁶ the effectiveness of this approach. Her work highlights the impact of educating clients on simple changes that can significantly reduce environmental impact. For example, promoting the use of less hot water during hair washing, opting for single washes instead of double washes, and utilizing leave-in conditioners can all contribute to a more sustainable hair care routine.

Beyond education, salons can actively promote the adoption of eco-friendly products. By carrying and showcasing "green" hair care lines that prioritize natural ingredients, biodegradable formulas, and eco-conscious packaging, stylists can introduce clients to sustainable alternatives that align with their values. This hands-on experience allows

²⁵ Cosmetica Italia, *56th Annual Report of the Italian Cosmetics Industry*, 2024, <https://www.cosmeticaitalia.it/export/sites/default/centro-studi/rapporto-annuale/Annual-Report-2024.pdf>

²⁶ University of Southampton, *Building Sustainability into hair and beauty*, 2022 <https://www.southampton.ac.uk/research/highlights/building-sustainability-into-hair-beauty>

clients to see, touch, and learn about these products in a trusted environment, fostering a deeper understanding of and commitment to sustainable choices.

Dr. Baden's research extends beyond theory, demonstrating the potential for industry collaboration to accelerate the adoption of sustainable practices. Her work led to the creation of a virtual salon training program that equips stylists with the knowledge and tools to educate their clients. This impactful program has already reached over 1,000 stylists and influenced curriculum changes for hairdressing apprentices in the UK. Such collaborative initiatives pave the way for a more environmentally responsible future for the hair care industry.

2.2 Salon Hair Care Market in Italy

According to a *Kline+Company* report²⁷, in 2023, the professional salon hair care market in Italy showed steady growth, despite facing economic headwinds. The market grew by 4.1%, reaching a total of EUR 562.9 million in sales. While this marks a slight slowdown from the 4.9% growth seen in 2022, it still reflects the market's resilience in a challenging economic climate.

One of the main factors affecting the market was inflation, which put pressure on consumers' purchasing power. As a result, people were more cautious about their spending. To counterbalance this, many companies raised their prices, which contributed to the overall increase in market value, even if actual sales volumes may not have risen as much.

A notable trend in 2023 was the continued rise of e-commerce as a key growth driver. Online sales channels saw an impressive 24.3% increase, highlighting a shift in consumer behavior towards purchasing hair care products online. This shift not only reflects the convenience of online shopping but also the wider range of products available through digital platforms.

In terms of product categories, there was a mixed performance. The back-bar channel, which consists of products used exclusively by professionals in salons, grew primarily due to price hikes rather than a rise in usage. On the other hand, the take-home salon products—those purchased by consumers for use at home—faced a slight decline. This

²⁷ Kline+Comany, *Salon Hair Care:Italy Market Analysis and Opportunities*, Salon Hair Care Global Series: Market Analysis and Opportunities, 2024

dip was influenced by the increased popularity of e-commerce and heightened competition from brick-and-mortar retail stores.

2.3 Main market players

According to *Kline + Company*, in 2023 the market share in the Italian salon hair care industry in 2023 remained concentrated among a few major players. L'Oréal, Wella Company, and Davines together held 42.0% of the market, up from 41.0% in 2022.

Kao Group made significant advancements with its professional hair care line, Kerasilk. The company undertook a strategic rebranding effort, elevating Kerasilk to the status of an independent master brand within its Kao Salon Division. This rebranding initiative aims to enhance the brand's visibility and distinct market presence, reflecting Kao's strategy to strengthen its position in the professional hair care sector.

The decision to reposition Kerasilk as a standalone master brand is part of Kao's broader strategy to focus on brand strength and market differentiation. By establishing Kerasilk independently, Kao aims to capitalize on the brand's established reputation for high-quality products and targeted solutions for salon professionals.

This move is indicative of a larger trend within the industry, where companies are increasingly focusing on refining their brand portfolios to better meet market demands. Kao's rebranding effort demonstrates its commitment to leveraging its expertise in innovation and quality to drive growth in a competitive landscape.

In addition to the rebranding, Kao is actively investing in expanding its product lines and enhancing the overall customer experience. These efforts are aligned with the company's goal of maintaining a strong presence in the global salon hair care market and adapting to evolving industry trends.

Kao's rebranding of Kerasilk reflects its strategic emphasis on reinforcing brand value and market presence. As the salon hair care industry continues to evolve, Kao's initiatives highlight its dedication to adapting and excelling in a rapidly changing market.

Competitive Landscape: Top 10 Marketers Overview



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Figure 2 - Source: Kline+Company

2.4 Key Drivers in Hair Care Market Italy

According to *Hair Care Market Reports 2024*²⁸, a Research from Reportlinker, the main 4 key drivers in the hair care market in Italy are:

- the increasing of disposable income: consumers now are spending more for premium hair care products;
- growing awareness of personal grooming: consumers are seeking hair care products that address specific hair concerns that can provide results;
- aging population: Italy has a rapidly aging population, which has resulted in a higher demand for hair care products catering to the specific needs of mature consumers;
- shift towards natural and organic products: consumers are becoming more conscious about the ingredients used in hair care products, leading to a growing demand for natural and organic alternatives that are perceived safe and more sustainable.

²⁸ Reportlinker, *Italy Hair Care Market Overview 2024-2028*, 2024, Reportlinker.com

Chapter III – Kao Group

Kao, a global leader in the beauty and personal care sector, is a Japanese company based in Tokyo, founded in 1887. Present in more than 60 countries, Kao portfolio includes a wide range of products that meet consumers' needs worldwide. With a rich heritage based on innovation and excellence, Kao has earned a reputation for producing high-quality, innovative products across several categories, including cosmetics, skincare, hair care, and home care.

Globally, Kao has diversified its business in four fields: Hygiene and Living Care, Health and Beauty Care (Salon Business included), Life Care, and Cosmetics.



Figure 3 - Source: www.kao.com

From 2007, and for 18 consecutive years now, Kao has been recognized on the World's Most Ethical Companies list, marking it as the only Asian company to achieve this distinction since the Ethisphere Institute. The Ethisphere Institute²⁹[Fig. 3].

3.1 The Kirei Lifestyle Plan

At the core of Kao Group business philosophy is the concept of the *Kirei Lifestyle Plan* (Kao Corporation's ESG strategy launched in April 2019 named after the Japanese word *kirei*) which means both cleanliness and beauty and is a guiding principle for all aspects of operations.

To better understand this philosophy, Dr. Elmar Mussenbrock, Director of Sustainability, Certifications/Partnerships, All Sectors AEMEA & Global Salon Liaison, during an

²⁹ A leading U.S. think tank specializing in business ethics and corporate social responsibility, recognizes companies that excel in areas such as transparency, integrity, ethics, and compliance.

interview³⁰ explained: "The *Kirei Lifestyle Plan* is not just a philosophy but the driving force behind our daily operations and long-term strategies. It reflects our commitment to harmonize beauty with environmental and social responsibility".

The *Kirei Lifestyle Plan* [Fig.4] is at the base of Kao commitment to create products that not only contribute to the well-being of consumers but also minimize their environmental impact and play an important role in their mission of creating a *Kirei World*.

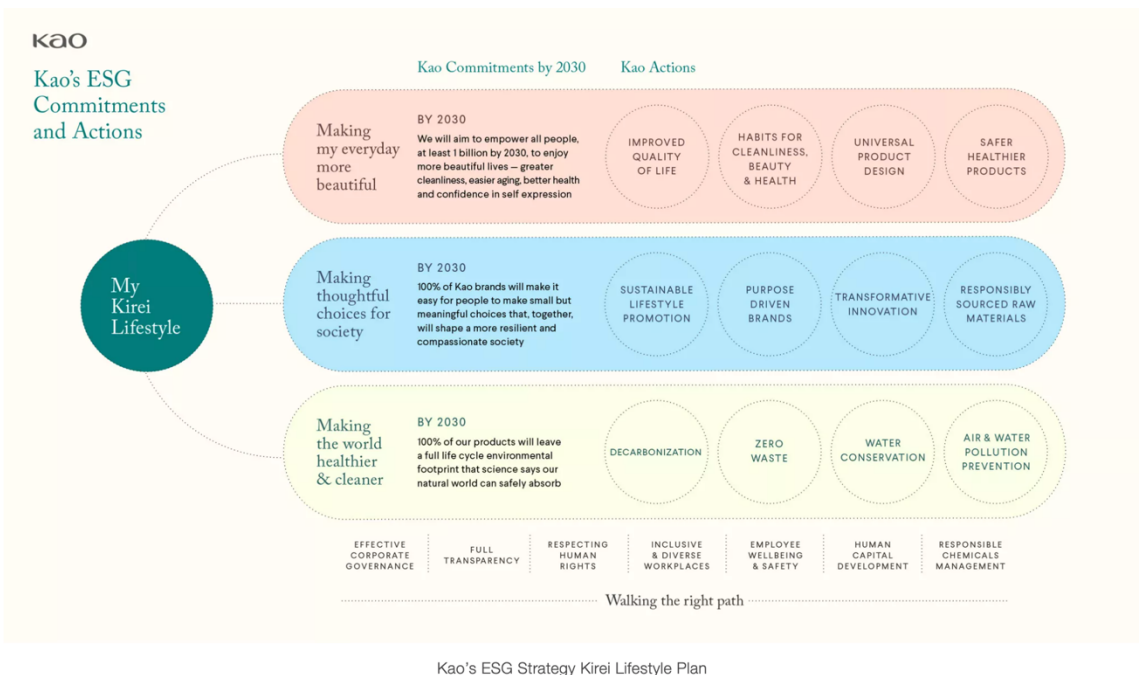


Figure 4 - Source: www.kao.com

3.2 Kao Sustainability Report 2024

Kao sustainability journey started in 2019 with the publication of its first Sustainability Report to provide transparent updates on its ESG efforts.

Kao is deeply aware of the environmental footprint of its operations and is committed to minimize it. To combat climate change, the company has set the ambitious goals of reducing CO2 emissions by 55% by 2030 (compared to 2017 levels), goal which is acknowledged as science-based target to reach the 1.5°C approach by Science Based Target initiative (SBTi). On top Kao is committed to reach net zero by 2040. Kao is

³⁰ An interview with Dr. Elmar Mussenbrock was conducted in March 2024 and the insights gathered were used for the development of this thesis project

increasing its use of renewable energy and improving energy efficiency across its manufacturing facilities.

Kao main focuses are: increasing the use of renewable energy and reducing the energy consumption across its manufacturing processes; water conservation; and educating consumers on responsible habits. The company is also committed to promote circular economy, to manage chemicals responsibly and to be transparent about the environmental impact of their products. Kao understands that achieving sustainability requires collaboration with several stakeholders. “We actively work with our suppliers and partners to ensure that sustainability is embedded throughout the supply chain. Our joint efforts help us tackle environmental and social challenges more effectively and create a ripple effect of positive impact”, Dr. Mussenbrock emphasized and continued: “There is an international global association called RSPO (Round Table of Sustainability Sourced Palm Oil), and you can certify the palm oil that you buy according to RSPO standards. That’s what a lot of suppliers do. What Kao does on top of buying raw materials from RSPO certified sources, is to engage with many small farmers, palm oil farmers in Indonesia. Kao is an active member of the RSPO and supports these small farmers to grow palm oil sustainably.”

Kao commitment to transparency extends to its supply chain, where the company works to ensure that its products are responsibly sourced and produced in compliance with global standards for sustainability and ethics. “Kao has a Green Innovation Center in Tokyo, where the focus is entirely on sustainable innovation. I’ll give you an example of what we are working on. I mentioned palm oil as a raw material for surfactants. However sustainable we try to be, palm oil is still a problem. So, for years, Kao has been searching for alternatives to palm oil for surfactants. Currently, they are developing surfactants made out of seaweed because, unlike palm oil, seaweed grows in water, and more than 70% of our planet is covered by water. It’s an unlimited resource. This is a long-term innovation Kao is working on. In the short term, Kao is also working to make better use of current palm oil resources. Kao has developed a method to create surfactants from palm oil scraps— which other suppliers throw away as waste - turning it into surfactants. It’s a great example of how we reduce waste and improve resource efficiency” noticed Dr. Mussenbrock.

Kao is also working to educate consumers about sustainable product choices and encourage responsible consumption habits by means of educational campaigns and marketing initiatives. *Green Mirror* is an example: an interactive virtual escape-room game designed specifically for salons is a way to learn more about sustainable practices. According to Dr. Elmar Mussenbrock, sustainability is a key factor in the salon industry: “One of the main sustainability challenges in the salon industry is the use of warm water, which contributes to high water consumption and energy use, leading to increased CO₂ emissions”. The use of aluminum in hair-color products, which is energy-intensive to produce, is another important issue. Dr. Mussenbrock stressed the importance of moving to recycled materials, stating: “In 2023 we have introduced Topchic Zero³¹ colors in recycled aluminum tubes. Moving forward, in January 2024 we extended this technology to another big brands in our color portfolio, Colorance³². This shift is crucial since recycled aluminum requires only 5% of the energy needed for virgin aluminum, thereby reducing its CO₂ emissions significantly.”

3.3 Kerasilk: Premium Hair Care Products

Kerasilk is a new line of natural and organic hair care products that uses *Kerasilk Silk+ Technology*³³ in its formulas. Founded in 1980’s under Goldwell³⁴ umbrella, the brand has been committed to the fair treatment of animals. In 2023, the brand was relaunched under the Kao Salon division as an independent brand, marking a new era of innovation with a focus on sustainability and high performance [Fig.5]. Thanks to advanced biotechnology, the brand has developed vegan, PETA-certified formulas that are cruelty-free and biodegradable. In seeking alternative options to conventional hair-care ingredients, Kerasilk reduces its environmental footprint without compromising product effectiveness.

³¹ Innovative ammonia-free hair dye products

³² Gentle demi-permanent hair color line

³³ www.kerasilk.com

³⁴ The brand has been part of the Kao Salon Division since 1948. Goldwell products are professional for the salon industry

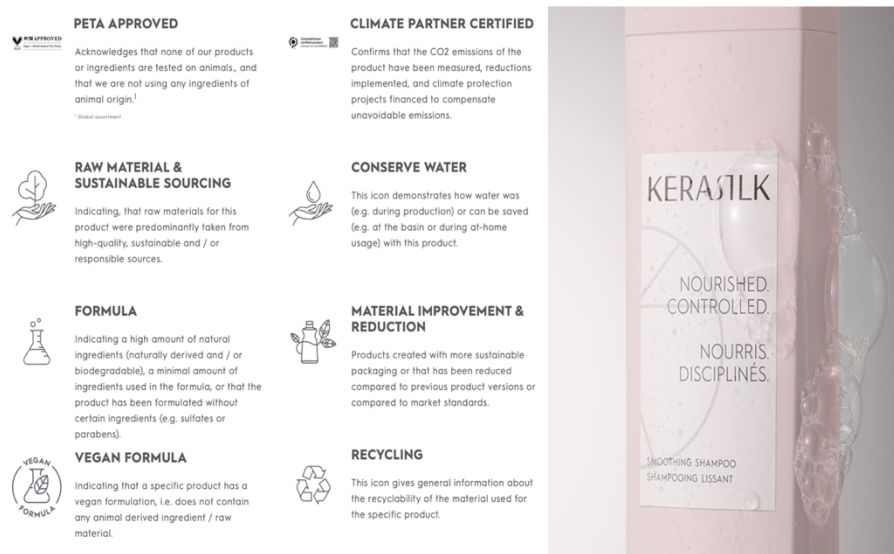


Figure 5 - Source: www.kerasilk.com

The core of this innovation is the *Silk+ Technology*, which combines Biomimetic Silk³⁵ with powerful ingredients to nourish and strengthen hair. Biomimetic Silk, a vegan alternative to animal-derived silk, replicates the benefits of natural silk by restoring lost aminoacids and protecting hair from daily environmental stressors such as UV rays and pollution.

In partnership with *ClimatePartner*³⁶, Kerasilk measures, reduces, and offsets its carbon emissions by supporting climate-protection initiatives like wind farms in South Africa.

The public pricing range for Kerasilk products is categorized as ‘premium’, offering consumers the opportunity to begin with travel-sized products to ensure value for money. Once they identify their ideal product, they can then purchase the retail size or liter set. Kerasilk products are distributed through major online cosmetics platform and hair salons.

³⁵ Biomimetic Silk is created using yeast (*Saccharomyces cerevisiae*) under controlled lab conditions. This method not only reduces environmental impact but also meets growing consumer demand for sustainable beauty solutions.

³⁶ *ClimatePartner* helps businesses measure and reduce carbon emissions, www.climatepartner.com

Chapter IV – Research Method, Data collection and Analysis

4.1 Research design

This study aims at finding out if existing Kerasilk users will continue using the products and identifying the drivers that influence their willingness to pay (WTP) for sustainability. It also seeks to understand how non-users could be attracted to the brand and identify the driver that most significantly affects their WTP for sustainable products. For this project, a survey was conducted, and statistical data were analyzed. Given the focus on the Italian market, the survey was conducted in Italian. The complete survey is included in the Appendix.

The research method involved a quantitative online survey, conducted via Qualtrics to collect firsthand data from a sample population. The survey link and QR code were distributed through email and the WhatsApp business accounts of Kao clients across Italy, including salon owners, freelancers contracted with Kao, area managers and sales agents. With their help, the QR code was printed and placed in larger hair salons and barber shops across Italy.

To encourage customers to complete the survey at the salon by scanning the QR code, samples of Kerasilk products were given to participants. Since the objective was to collect reliable data, 400 surveys were distributed over 4 months, from April 22 to August 26, 2024, reaching the target of 393 respondents. IBM SPSS software was used to analyze Qualtrics data.

4.2 Survey Design

The survey design has been carefully designed to obtain relevant information about purchasing behaviors, consumers' perceptions of Kerasilk products, and attitudes towards sustainability, using an effective combination of multiple-choice questions, Likert scales, and ranking. The survey consists of 17 questions and is divided into 6 thematic blocks. There are two groups identified for this survey: Kerasilk users and non-users.

The first block is about consumers' hair care purchasing behavior, asking about the frequency of their use of hair care products.

The second block, regarding purchase decision, asks participants to rank the factors influencing their usual hair care product purchase decisions, using a preference scale from 1 to 6.

The ranking scale helps to identify main aspects that are considered the most relevant. The third block focuses on Kerasilk products and is dedicated to determining if participants have ever purchased Kerasilk products with a simple multiple-choice question. Then, the survey splits into two sections based on the SHIFT Model (White et al., 2019) for Kerasilk, for users and non-users.

The fourth block, regarding willingness to pay for sustainability, examines participants' willingness to pay more for sustainable hair care products through Likert questions measuring the degree of agreement with sustainability-related statements.

The fifth block, regarding future attitudes, explores future purchasing intentions for Kerasilk products with two Likert-scale questions, separated for users and non-users.

Finally, we collected demographic data such as gender, age range, education level, and annual income through multiple-choice questions.

4.3 Data analysis

4.3.1 Socio-demographics

Moving into the details of the analysis, we'll begin with the final section, which focuses on socio-demographics to better understand the characteristics of our target audience. From the descriptive analysis, we can see that 56% of respondents were female [Fig.6]. This may be because the majority of Kao's clients are hair salons, which tend to have a higher percentage of female consumers.

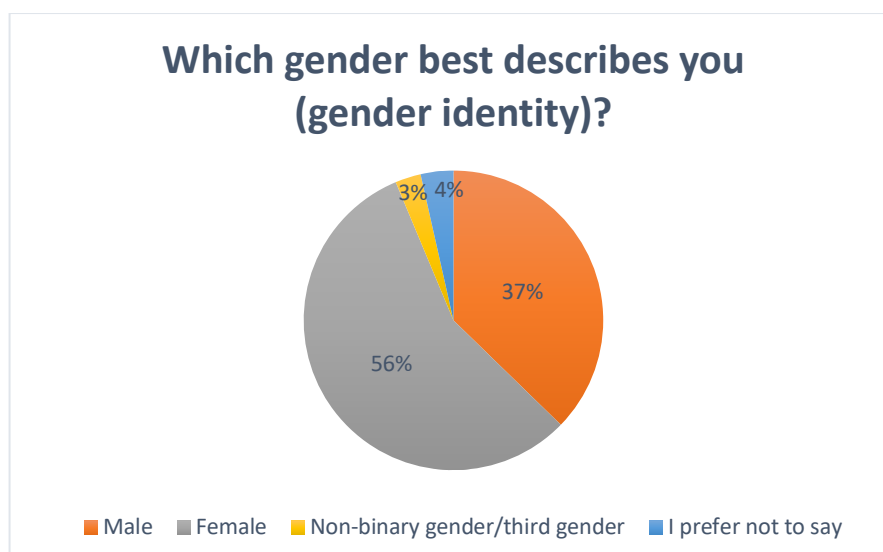


Figure 6 – Gender

In terms of age segmentation, 33% of respondents was in the 36-45 bracket, closely followed by 32% in the 26-35 group, making the 26-45 age range a dominant and highly relevant target demographic [Fig.7].

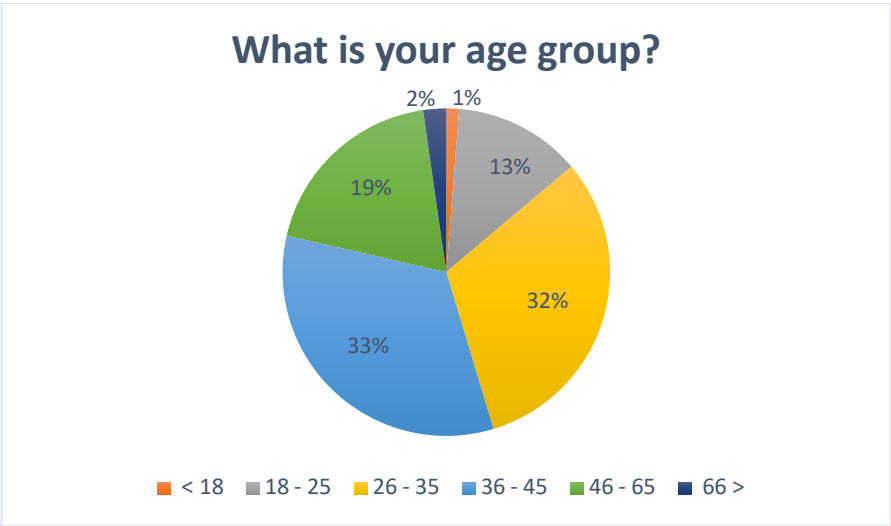


Figure 7 – Age

In terms of education level [Fig.8], the sample was diverse: 31% of respondents hold a master’s degree, 28% have a bachelor’s degree, and 27% have a high school diploma, reflecting a broad range of educational backgrounds within our target audience.

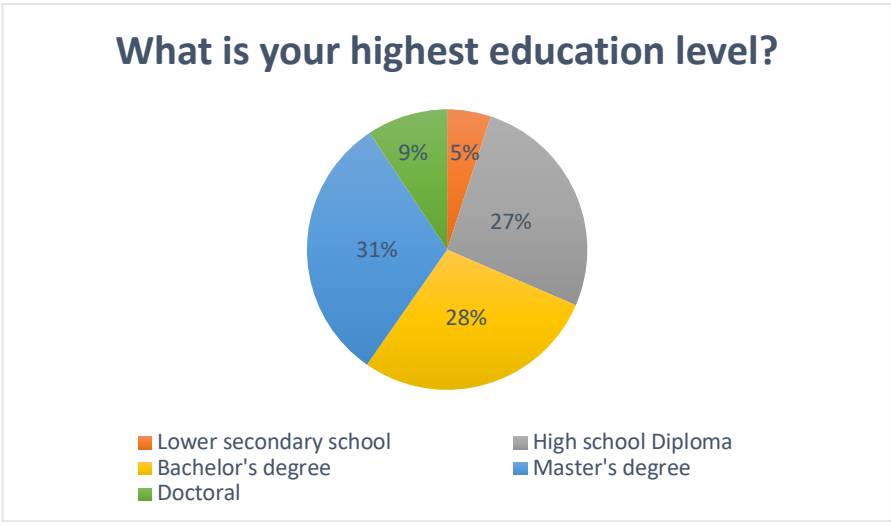


Figure 8 – Education

For what concern the income [Fig.9], as we can see the income is variegated with the majority of 31% that has an income range between 40.000€ and 59.000€ followed by the 28% with an income range between 20.000€ and 39.999€ and the 21% from 60.000€ and 79.999€.

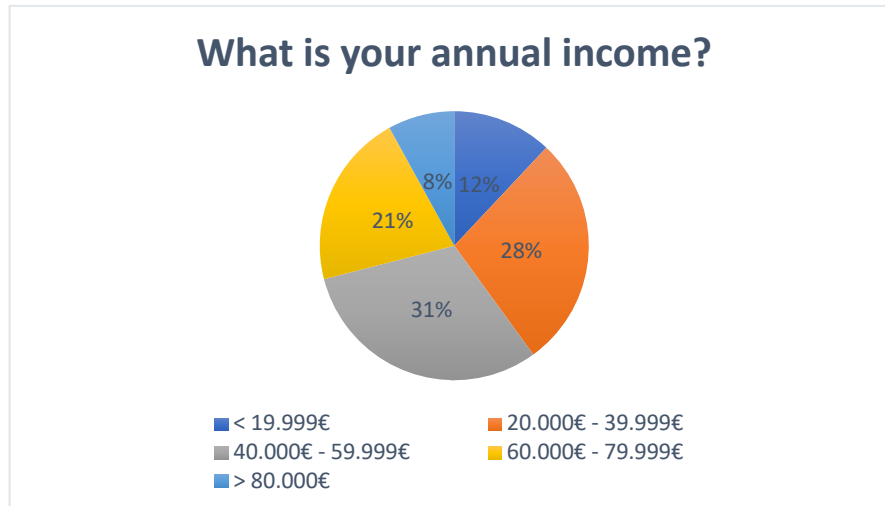


Figure 9 – Income

4.3.2 Hair-care Purchase Behaviour

Analyzing the first section of the survey, which focuses on purchasing behavior [Fig.10], consumers were asked three key questions to assess their buying habits.

The first question examined how frequently they purchase hair care products: 35% reported buying once a month, 27% every two months, 21% more than once a month and 17% every three months.



Figure 10 – Purchase behavior

The 53% of consumers rate the importance of price in their hair care product purchases [Fig.11] as 7 or 8 out of 10.

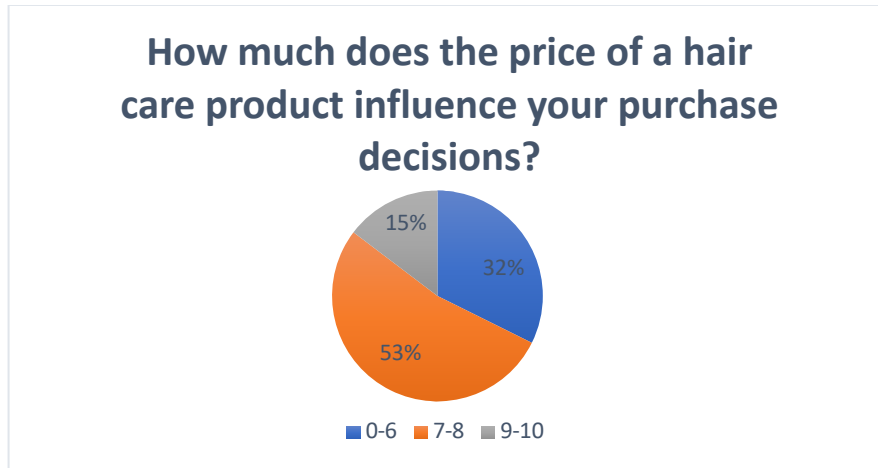


Figure 11 – Purchase decisions

In terms of hair care product purchasing habits [Fig.12], 30% of consumers prefer buying from hair salons, 23% shop online, 19% visit perfume stores, 15% choose hairdresser supply stores, and 13% buy from supermarkets.



Figure 12 – Purchase habit

4.3.3 Purchase Decision

The second thematic block relates to the purchase decision. Participants were asked to rank the importance of six items, from most to least important, in their decision to

purchase hair care products. These items are formulated taking into account four of the five drivers based on the SHIFT Model (White et al., 2019), with focus on Social Influence, Habits, Individual values and self-identity, Feeling and cognitions.

Frequencies

		Statistics					
		Rank the following aspects that might influence your decision to purchase hair care products according to your perception of their importance, from 1 (most important) to 6 (least important) – Opinions of people important to me (e.g., friends, partner, etc.)	Rank the following aspects that might influence your decision to purchase hair care products according to your perception of their importance, from 1 (most important) to 6 (least important) – Habits of always buying the same products.	Rank the following aspects that might influence your decision to purchase hair care products according to your perception of their importance, from 1 (most important) to 6 (least important) – Product value (good quality – price ratio)	Rank the following aspects that might influence your decision to purchase hair care products according to your perception of their importance, from 1 (most important) to 6 (least important) – Product's ability to boost my self-esteem.	Rank the following aspects that might influence your decision to purchase hair care products according to your perception of their importance, from 1 (most important) to 6 (least important) – Product's ability to evoke positive emotions (e.g. joy, pride, etc.)	Rank the following aspects that might influence your decision to purchase hair care products according to your perception of their importance, from 1 (most important) to 6 (least important) – Knowledge of the product's features
N	Valid	393	393	393	393	393	393
	Missing	39	39	39	39	39	39
Mean		3,76	3,55	3,73	3,20	3,60	3,17
Median		4,00	4,00	4,00	3,00	4,00	3,00
Mode		6	2	6	1	4	1

Figure 13 – Ranking of relevant aspects considered in the items, SPSS IBM output

According to the descriptive statistics [Fig.13], the factors ranked from most important to least important are as follows: Knowledge of the product's features (mean 3,17), Product's ability to boost my self-esteem (mean 3,20), Habit of consistently purchasing the same products (mean 3,55), Product's ability to evoke positive emotions (mean 3,60), Product value, quality-to-price ratio, (mean 3,73), and Opinion of people important to me (mean 3,76).

4.3.4 Willingness to Pay Sustainable

We analyzed which drivers of the SHIFT Model (White et al., 2019) affect consumer willingness to pay for sustainability. To this end, three items were selected to measure it. Since the scale has already been validated³⁷, factor analysis was not performed. The

³⁷ Swapnil Ganesh Tawde, ShabbirHusain RV, *How does green consumers' self-concept promote willingness to pay more? A sequential mediation effect of green product virtue and green perceived value*, John Wiley & Sons Ltd., 2024

reliability of the mean of the three items is acceptable, with a Cronbach's alpha value of 0.690 [Fig.14].

Reliability

Scale: ALL VARIABLES

Case Processing Summary

		N	%
Cases	Valid	393	91,0
	Excluded ^a	39	9,0
	Total	432	100,0

a. Listwise deletion based on all variables in the procedure.

Reliability Statistics

Cronbach's Alpha	N of Items
,690	3

Descriptives

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
WTP	393	1,00	5,00	3,9788	,82606
Valid N (listwise)	393				

Figure 14 – Reliability scale WTP, SPSS IBM output

4.3.5 Drivers of the SHIFT Model (White et al., 2019) that affect the WTP for Kerasilk's user and non-user

To analyze if and which driver [Fig.15] of the SHIFT Model (White et al., 2019) will affect the WTP, a regression was performed, analyzing some of the most important driver of the Shift Model (White et al., 2019). Although Tangibility is a key driver in the SHIFT Model (White et al., 2019), this study prioritized other factors — such as Social Influence, Habit, Individual Self, and Feelings. This perspective can be relevant since Kerasilk, recently relaunched as a standalone brand with an organic formulation, is already familiar to half the consumers in this study. Research on green consumption behaviors³⁸ shows that while tangibility can sometimes be a barrier, its effect is less significant when consumers are familiar with and trust the brand. As a result, this study focuses on the other drivers in the SHIFT Model because they are expected to have a stronger impact on consumers' willingness to pay (WTP) for sustainable products.

³⁸ Lay Peng Tan, Micael-Lee Johnstone, Lin Yang, Barriers to green consumption behaviours: The roles of consumers' green perceptions, Australasian Marketing Journal (AMJ), Volume 24, Issue 4, 2016, Pages 288-299.

Sinc Tangibility is a key driver in the SHIFT Model, its role may be less critical at this stage and could be examined more in future research.

USER QUESTIONS		NON-USER QUESTIONS	
Social Influence	How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) will influence my choice of Kerasilk hair care products?	Social Influence	How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) could influence my decision to purchase Kerasilk hair care products?
Habits	How likely is it that my purchase of Kerasilk products is simply a habitual behaviour?	Habits	How likely is it that my choice to purchase products other than Kerasilk is simply due to habitual behavior?
Individual values and self-identity	How likely is it that Kerasilk products will help improve my image and self-esteem? How likely do you think it is that Kerasilk products are affordable (good value for money)?	Individual values and self-identity	How likely is it that Kerasilk hair care products could potentially help improve my image and self-esteem? How likely is it that Kerasilk products are affordable (good value for money)?
Feeling and cognitions	How likely is it that Kerasilk products will evoke positive emotions in me (e.g., joy, pride, etc.)? How likely is it that I am familiar with all the features of Kerasilk products?	Feeling and cognitions	How likely is it that Kerasilk products, once purchased, will evoke positive emotions in me (e.g., joy, pride, etc.)? How likely is it that I will be aware of all the features of Kerasilk products before purchasing them?

Figure 15 – Independent variables

To evaluate whether and which drivers affect the WTP for user group, a simple linear regression analysis was conducted. The regression model was significant ($F(6, 191) = 4.797, p < .001$) with R^2 of .131. This value indicates that the alleged drivers of the SHIFT Model (White et al., 2019) explain approximately 13% of the variance in WTP [Fig.16]. With a p-values of 0.041 and, 0.054, cognition and self-identity, respectively, are the two main drivers capable of influencing the WTP for users of Kerasilk products [Fig.17].

Descriptive Statistics

	Mean	Std. Deviation	N
WTP	3,9276	,89293	198
How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) will influence my choice of Kerasilk hair care products? – Group	1,98	,750	198
How likely is it that my purchase of Kerasilk products is simply a habitual behaviour? – Group	1,84	,783	198
How likely is it that Kerasilk products will help improve my image and self-esteem? – Group	2,10	,668	198
How likely do you think it is that Kerasilk products are affordable (good value for money)? – Group	1,95	,696	198
How likely is it that Kerasilk products will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group	2,08	,656	198
How likely is it that I am familiar with all the features of Kerasilk products? – Group	2,12	,685	198

Model Summary^b

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	,362 ^a	,131	,104	,84539

a. Predictors: (Constant), How likely is it that I am familiar with all the features of Kerasilk products? – Group, How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) will influence my choice of Kerasilk hair care products? – Group, How likely is it that Kerasilk products will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group, How likely is it that my purchase of Kerasilk products is simply a habitual behaviour? – Group, How likely is it that Kerasilk products will help improve my image and self-esteem? – Group, How likely do you think it is that Kerasilk products are affordable (good value for money)? – Group

b. Dependent Variable: WTP

ANOVA^a

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	20,569	6	3,428	4,797	<,001 ^b
	Residual	136,504	191	,715		
	Total	157,074	197			

a. Dependent Variable: WTP

b. Predictors: (Constant), How likely is it that I am familiar with all the features of Kerasilk products? – Group, How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) will influence my choice of Kerasilk hair care products? – Group, How likely is it that Kerasilk products will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group, How likely is it that my purchase of Kerasilk products is simply a habitual behaviour? – Group, How likely is it that Kerasilk products will help improve my image and self-esteem? – Group, How likely do you think it is that Kerasilk products are affordable (good value for money)? – Group

Figure 16 – Regression WTP vs SHIFT Model (White et al., 2019) drivers – User group, SPSS IBM output

Coefficients ^a								
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.	Collinearity Statistics	
		B	Std. Error	Beta			Tolerance	VIF
1	(Constant)	2,449	,287		8,533	<,001		
	How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) will influence my choice of Kerasilk hair care products? – Group	,125	,089	,105	1,403	,162	,811	1,233
	How likely is it that my purchase of Kerasilk products is simply a habitual behaviour? – Group	,001	,089	,001	,016	,988	,743	1,346
	How likely is it that Kerasilk products will help improve my image and self-esteem? – Group	,197	,102	,148	1,935	,054	,780	1,282
	How likely do you think it is that Kerasilk products are affordable (good value for money)? – Group	,076	,105	,059	,720	,473	,675	1,481
	How likely is it that Kerasilk products will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group	,116	,101	,085	1,140	,256	,819	1,220
	How likely is it that I am familiar with all the features of Kerasilk products? – Group	,201	,098	,154	2,054	,041	,811	1,234

a. Dependent Variable: WTP

Figure 17 – Regression WTP vs SHIFT Model (White et al., 2019) drivers – User group, SPSS IBM output

Collinearity Diagnostics ^a										
Model	Dimension	Eigenvalue	Condition Index	(Constant)	Variance Proportions					
					How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) will influence my choice of Kerasilk hair care products? – Group	How likely is it that my purchase of Kerasilk products is simply a habitual behaviour? – Group	How likely is it that Kerasilk products will help improve my image and self-esteem? – Group	How likely do you think it is that Kerasilk products are affordable (good value for money)? – Group	How likely is it that Kerasilk products will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group	How likely is it that I am familiar with all the features of Kerasilk products? – Group
1	1	6,556	1,000	,00	,00	,00	,00	,00	,00	,00
	2	,130	7,091	,01	,09	,39	,04	,02	,09	,08
	3	,093	8,414	,00	,68	,31	,01	,00	,01	,07
	4	,067	9,904	,01	,06	,12	,12	,62	,00	,24
	5	,060	10,455	,00	,07	,05	,32	,01	,71	,10
	6	,058	10,661	,00	,00	,12	,41	,33	,05	,41
	7	,036	13,488	,97	,09	,01	,09	,00	,14	,11

a. Dependent Variable: WTP

Residuals Statistics ^a					
	Minimum	Maximum	Mean	Std. Deviation	N
Predicted Value	3,1649	4,5970	3,9276	,32313	198
Residual	-3,14668	1,51873	,00000	,83242	198
Std. Predicted Value	-2,361	2,072	,000	1,000	198
Std. Residual	-3,722	1,796	,000	,985	198

a. Dependent Variable: WTP

Figure 18 – Regression WTP vs SHIFT Model (White et al., 2019) drivers – User group, SPSS IBM output

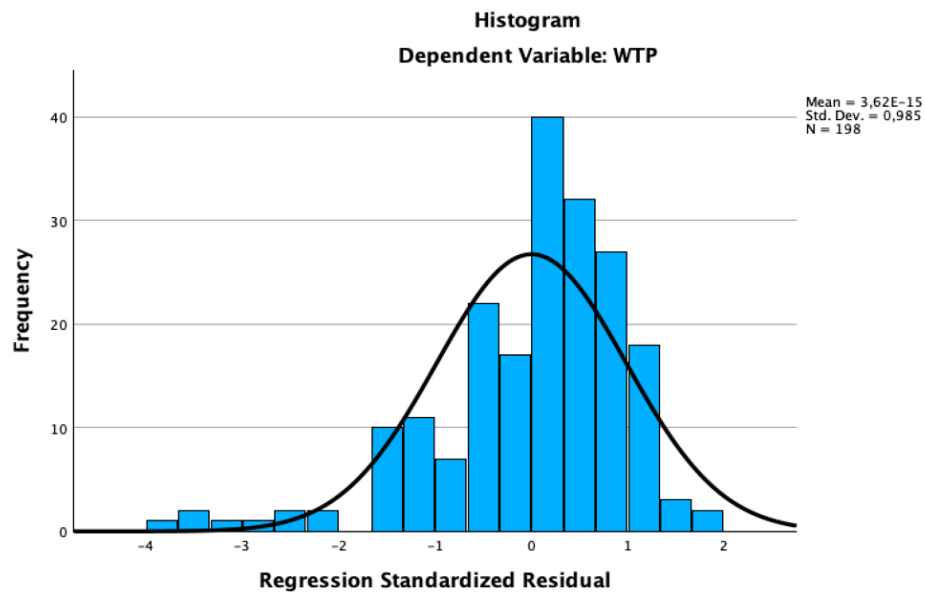


Figure 19 – Frequency vs Regression Standardized Residual, Users, SPSS IBM output

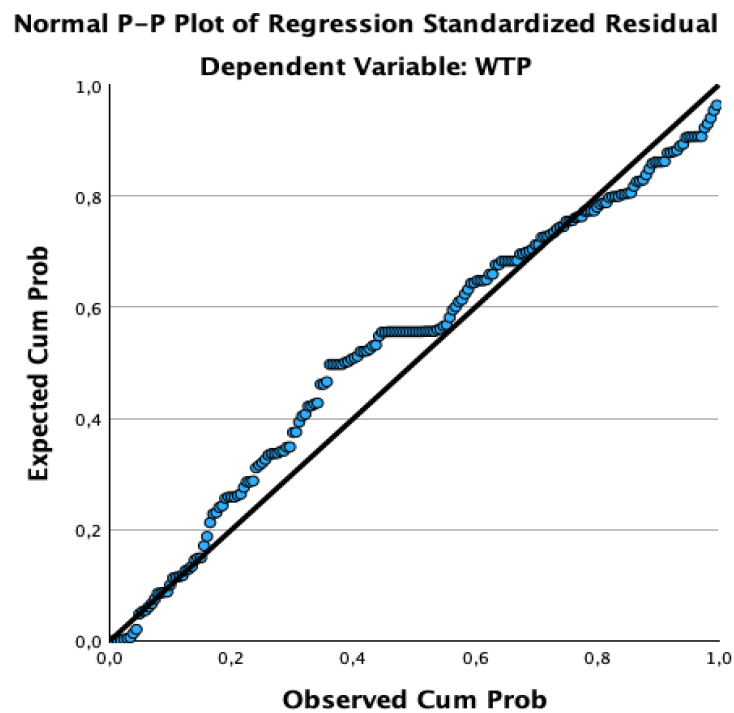


Figure 20 – SPSS IBM output

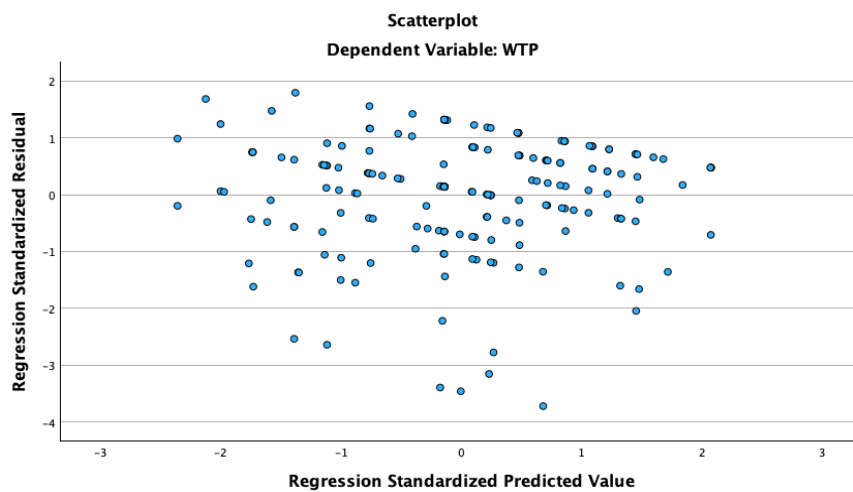


Figure 21 – SPSS IBM output

Also, for non-user a simple linear regression analysis was conducted to check if some drivers of the SHIFT Model (White et al., 2019) affect the WTP. Also in this case, a moderate regression was found ($F(6, 186) = 6.262, p < .001$). The R^2 was 0.168, indicating that the drivers of the SHIFT Model (White et al., 2019) explained approximately 16,8% of the variance in WTP [Fig.22].

With a p-value of 0.037, Social Influence is the only driver that influence the WTP for non-user Kerasilk products [Fig.23].

Descriptive Statistics			
	Mean	Std. Deviation	N
WTP	4,0207	,74817	193
How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) could influence my decision to purchase Kerasilk hair care products? – Group	2,10	,699	193
How likely is it that my choice to purchase products other than Kerasilk is simply due to habitual behavior? – Group	2,01	,777	193
How likely is it that Kerasilk hair care products could potentially help improve my image and self-esteem? – Group	1,98	,743	193
How likely is it that Kerasilk products are affordable (good value for money)? – Group	2,07	,750	193
How likely is it that Kerasilk products, once purchased, will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group	2,05	,724	193
How likely is it that I will be aware of all the features of Kerasilk products before purchasing them? – Group	2,04	,720	193

Model Summary ^b				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	,410 ^a	,168	,141	,69333

a. Predictors: (Constant), How likely is it that I will be aware of all the features of Kerasilk products before purchasing them? – Group, How likely is it that my choice to purchase products other than Kerasilk is simply due to habitual behavior? – Group, How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) could influence my decision to purchase Kerasilk hair care products? – Group, How likely is it that Kerasilk products, once purchased, will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group, How likely is it that Kerasilk products are affordable (good value for money)? – Group, How likely is it that Kerasilk hair care products could potentially help improve my image and self-esteem? – Group

b. Dependent Variable: WTP

ANOVA ^a						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	18,061	6	3,010	6,262	<,001 ^b
	Residual	89,412	186	,481		
	Total	107,473	192			

a. Dependent Variable: WTP

b. Predictors: (Constant), How likely is it that I will be aware of all the features of Kerasilk products before purchasing them? – Group, How likely is it that my choice to purchase products other than Kerasilk is simply due to habitual behavior? – Group, How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) could influence my decision to purchase Kerasilk hair care products? – Group, How likely is it that Kerasilk products, once purchased, will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group, How likely is it that Kerasilk products are affordable (good value for money)? – Group, How likely is it that Kerasilk hair care products could potentially help improve my image and self-esteem? – Group

Figure 22 – Regression WTP vs SHIFT Model (White et al., 2019) drivers – Non-user group, SPSS IBM output

Coefficients ^a								
Model		Unstandardized Coefficients B	Std. Error	Standardized Coefficients Beta	t	Sig.	Collinearity Statistics Tolerance	VIF
1	(Constant)	2,765	,215		12,855	<,001		
	How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) could influence my decision to purchase Kerasilk hair care products? – Group	,175	,083	,163	2,105	,037	,742	1,347
	How likely is it that my choice to purchase products other than Kerasilk is simply due to habitual behavior? – Group	,033	,071	,035	,470	,639	,829	1,206
	How likely is it that Kerasilk hair care products could potentially help improve my image and self-esteem? – Group	,093	,082	,092	1,128	,261	,667	1,499
	How likely is it that Kerasilk products are affordable (good value for money)? – Group	,111	,078	,111	1,425	,156	,735	1,361
	How likely is it that Kerasilk products, once purchased, will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group	,131	,080	,127	1,637	,103	,743	1,346
	How likely is it that I will be aware of all the features of Kerasilk products before purchasing them? – Group	,068	,084	,066	,817	,415	,687	1,455

a. Dependent Variable: WTP

Figure 23 – Regression WTP vs SHIFT Model (White et al., 2019) drivers – Non-user group, SPSS IBM output

Collinearity Diagnostics ^a										
				Variance Proportions						
Model	Dimension	Eigenvalue	Condition Index	(Constant)	How likely is it that the opinions of people important to me (e.g., friends, partner, etc.) could influence my decision to purchase Kerasilk hair care products? – Group	How likely is it that my choice to purchase products other than Kerasilk is simply due to habitual behavior? – Group	How likely is it that Kerasilk hair care products could potentially help improve my image and self-esteem? – Group	How likely is it that Kerasilk products are affordable (good value for money)? – Group	How likely is it that Kerasilk products, once purchased, will evoke positive emotions in me (e.g., joy, pride, etc.)? – Group	How likely is it that I will be aware of all the features of Kerasilk products before purchasing them? – Group
1	1	6,573	1,000	,00	,00	,00	,00	,00	,00	,00
	2	,102	8,044	,00	,04	,66	,15	,04	,00	,06
	3	,084	8,842	,00	,00	,25	,26	,50	,04	,00
	4	,074	9,435	,00	,27	,00	,00	,04	,75	,00
	5	,067	9,909	,03	,34	,01	,01	,03	,09	,61
	6	,057	10,741	,10	,05	,00	,54	,39	,02	,27
	7	,044	12,256	,86	,29	,07	,04	,00	,09	,05

a. Dependent Variable: WTP

Residuals Statistics ^a					
	Minimum	Maximum	Mean	Std. Deviation	N
Predicted Value	3,3761	4,5994	4,0207	,30670	193
Residual	-3,22988	1,31219	,00000	,68241	193
Std. Predicted Value	-2,102	1,887	,000	1,000	193
Std. Residual	-4,658	1,893	,000	,984	193

a. Dependent Variable: WTP

Figure 24 – Regression WTP vs SHIFT Model (White et al., 2019) drivers – Non-user group, SPSS IBM output

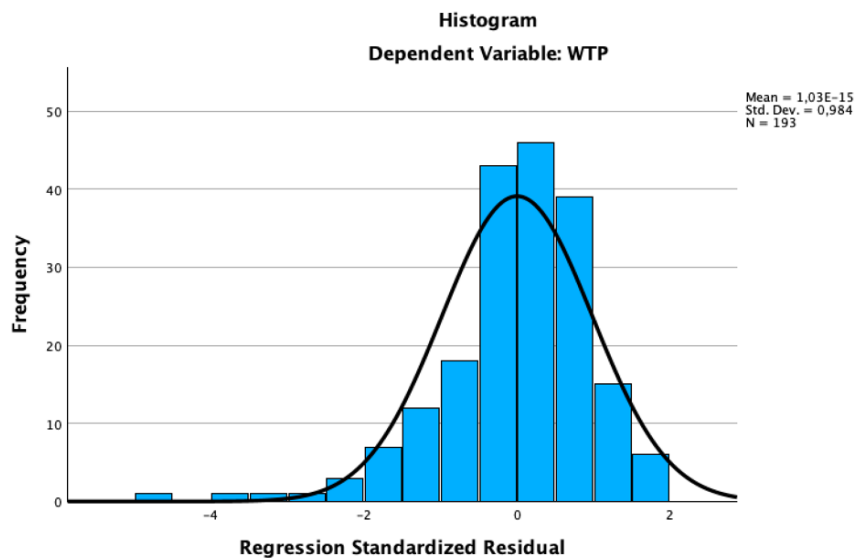


Figure 25 – Frequency vs Regression Standardized Residual – Non-user, SPSS IBM output

Normal P-P Plot of Regression Standardized Residual

Dependent Variable: WTP

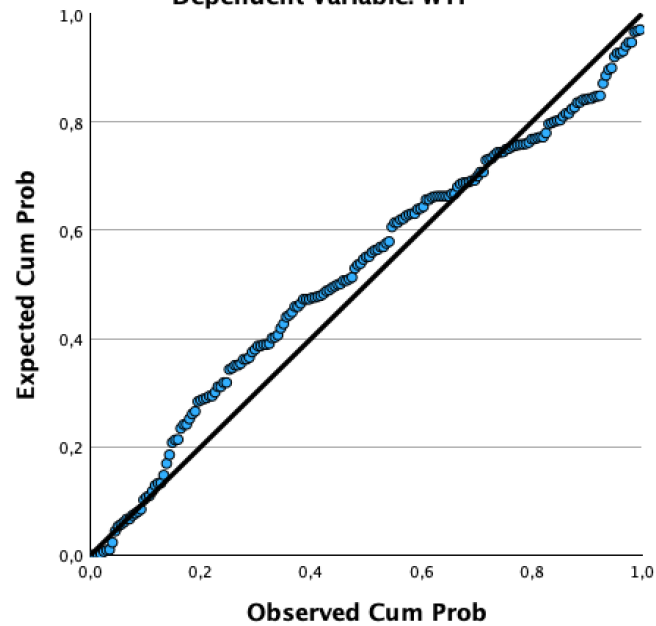


Figure 26 – Non-user, SPSS IBM output

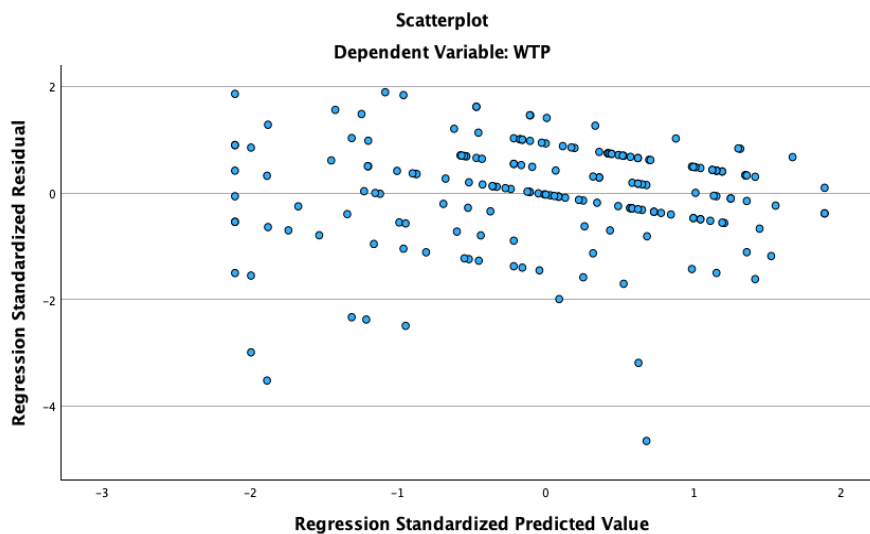


Figure 27 – Non-user, SPSS IBM output

4.3.5 Future attitudes

Looking at the descriptive statistics on future purchasing intentions for Kerasilk, we can see that on a 0-10 scale, more than half of Kerasilk users give a score of 7 or 8, indicating they will likely continue purchasing Kerasilk products next year. Additionally, 35% of users give a score of 9 or 10, which is significant [Fig.28].

How likely are you to continue purchasing Kerasilk hair care products over the next year?

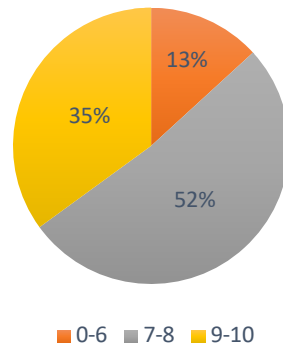


Figure 28 – Future attitude – User group

For Kerasilk non-users, the percentage of people considering purchasing Kerasilk products is notable, with 43% giving a score of 7 or 8 on a scale from 0 to 10, and 31% giving a score of 9 or 10. Therefore, in this case as well, the scores are relatively high [Fig.29].

How likely are you to consider purchasing Kerasilk hair care products in the next year?

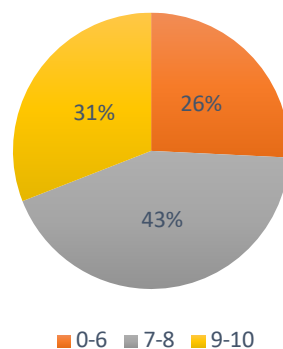


Figure 29 –Future attitude – Non-user group

Chapter V - Discussion and limitations

The findings from regression analysis provide Kao with a significant understanding of how both Kerasilk users and non-users engage with the brand and suggest possible strategies to focus on.

5.1 Users: Cognition and Self-Identity as Key Drivers

Cognition and self-identity are emerging as the primary factors affecting their WTP for Kerasilk users. Cognition reflects users' understanding of the product's attributes, such as its benefits and unique features, while self-identity pertains to how the product aligns with their personal image and values. This indicates that users are not just paying for a product; they are investing in something that reinforces their self-perception and personal standards.

According to this, Kao communication strategy should focus on enhancing product education. By clearly articulating the benefits of Kerasilk, from its advanced formulations to its commitment to sustainability, Kao can cater to users' need for detailed product knowledge. Educational campaigns that illustrate the science behind the product and its role in luxury hair care will resonate with users who value a well-informed purchase decision.

Furthermore, reinforcing the product's alignment with users' self-identity is crucial. Messaging should highlight how Kerasilk embodies personal care, luxury, and sustainability, helping users express their own values through their choice of products. This could be achieved through success stories, testimonials, or tailored recommendations that show how Kerasilk enhances personal style and values.

Finally, since users perceive Kerasilk as a premium product, Kao should emphasize this aspect in their marketing. Creating a sense of exclusivity through high-end packaging or special events can further cement Kerasilk's position as a luxury item worth the premium price.

5.2 Non-Users: Social Influence as the Main Driver

On the other hand, social influence seems to be the main driver affecting willingness to pay for non-users. Insights reveal that non-users are more inclined to be affected by

external opinions. Their purchase decision is strongly affected by how products are influenced within their peer group.

To address this, Kao should focus on building social proof. Engaging influencers, collaborating with popular salons, and showcasing positive user-generated content can enhance the brand's credibility. collaborating with popular salons, and showcasing positive user-generated content can enhance the brand's credibility and make Kerasilk more attractive. Fostering a sense of community around Kerasilk can also be effective. Kao might consider positioning Kerasilk as a main player in beauty communities or running emotional campaigns to cultivate a sense of belonging among consumers and can motivate non-users to try Kerasilk, particularly if they see that others in their network are already using and recommending it. Word of mouth is another strategy to consider that can motivate non-users to try Kerasilk, particularly if they see that others in their network are already using and endorsing it.

5.3 Purchase Intention and WTP

The link between purchase intention and willingness to pay is crucial for both user groups. Although the drivers differ, the ultimate aim is to influence consumers to not only consider purchasing but also to be willing to pay a premium price. Kao should therefore focus on building trust in Kerasilk's value: for users, this means emphasizing the quality and results that justify the premium; for non-users, it's about creating a perception that Kerasilk is a must-have among their peers.

Differentiation is also key. Kao must highlight what sets Kerasilk apart from competitors for users, emphasizing product superiority and emotional appeal. For non-users, building social credibility and positioning Kerasilk as a trendy, must-try product will be essential.

5.4 Regression Implications

The moderate R^2 values (13% for users and 16.8% for non-users) suggest that while the SHIFT Model (White et al., 2019) drivers offer valuable insights into WTP, they do not account for all the factors influencing consumer behavior. This indicates that other elements, such as perceived product quality, brand loyalty, or environmental impact,

might also play a role. Further research into these additional factors could provide a more comprehensive understanding of WTP and refine Kao's communication strategies.

Conclusion

The haircare industry is always growing and evolving. The hair care market is being driven by consumer needs and preferences. High demand for targeted solutions such as dandruff or frizz hair products, for example, is increasing this growth³⁹. Moreover, the constant shifts in self-care habits, lifestyle and fashion trends drive the need for innovative hair care products. The influence of fashion and beauty trends is fundamental: influencers and celebrities with their hairstyles, colors, and textures, are affecting consumer choices and product demand⁴⁰. In this competitive landscape, manufacturers and brands constantly introduce new products with formulations that align with the latest trends⁴¹. Nowadays consumers are more aware of environmental issues, especially after the COVID-19 pandemic, which highlighted the importance of sustainability. As a result, companies are investing significantly in the research for sustainable raw ingredients, addressing every aspect from how things are made to how they're packaged. Consumers are always looking for brands that prioritize sustainable ingredients and responsible practices⁴².

The findings of this thesis emphasize the importance of meeting the evolving needs of consumer in today's landscape. Kao and Kerasilk products can strengthen its relationship with both existing and potential customers by investing in education, promoting community engagement through social proof that can improve the brand's appeal, especially among those who haven't tried its products yet.

While this research highlights the factors that influence willingness to pay for Kerasilk products, it doesn't explore other possible aspects.

Long-term research could be helpful to see how consumer preferences change over time, especially as new trends and sustainability issues come up. Examining various consumer

³⁹ Reportlinker, *Italy Hair Care Market Overview 2024-2028*, 2024, Reportlinker.com

⁴⁰ Robert John Doe, *The impact of Celebrity Culture on the US Haircare Market*, 2024, <https://medium.com/@robertjohndoe22/the-impact-of-celebrity-culture-on-the-us-haircare-market-54dcb5b9155c#>

⁴¹ Jodie Shaw, Audience: *A Deep Dive into Consumer Behaviour in the Beauty Industry*, <https://kadence.com/en-us/consumer-behavior-in-the-beauty-industry/>

⁴² Kadence International, About face, *Emerging global trends in the Beauty and Cosmetics Industries*, <https://kadence.com/wp-content/uploads/2022/09/about-face.pdf>

groups would improve the findings. Additionally, considering Kao's other sustainable brands in its portfolio could provide valuable insights for further research.

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Appendix

Survey questions

Grazie per la tua partecipazione a questo sondaggio! La tua opinione è fondamentale per comprendere meglio le esperienze e le prospettive dei consumatori riguardo ai prodotti per la cura dei capelli e alla sostenibilità ambientale. Il sondaggio richiederà solo pochi minuti del tuo tempo. Le tue risposte saranno anonime.

1 - Quanto spesso acquisti prodotti per la cura dei capelli?

Più di una volta al mese

Una volta al mese

Ogni due mesi

Ogni tre mesi

2 - Quanto influisce il prezzo del prodotto per la cura dei capelli sulle tue decisioni di acquisto?

Per niente **Moltissimo**

0 1 2 3 4 5 6 7 8 9 10

3 - Dove sei solito acquistare prodotti per la cura dei capelli?

Supermercato

Profumeria

Saloni di bellezza

Forniture per parrucchieri

Online

4 - Ordina in base alla tua percezione di importanza i seguenti aspetti che potrebbero influenzare le tue decisioni di acquisto di prodotti per la cura dei capelli, da 1 (il più importante) a 6 (il meno importante).

_Convenienza del prodotto (buon rapporto qualità-prezzo)

_Abitudine ad acquistare sempre gli stessi prodotti

_Opinioni delle persone per me importanti (ad es., amici, partner, ecc.)

_Capacità del prodotto di suscitare emozioni positive (ad es. gioia, orgoglio, ecc.)

_Conoscenza delle caratteristiche del prodotto

_Capacità del prodotto di migliorare la mia immagine e autostima

5 - Hai mai acquistato prodotti Kerasilk?

Sì

No

KERASILK USER BLOCK

6 - Quanto è probabile che le opinioni di persone per me importanti (ad es., amici, partner, ecc.) influenzino la mia scelta dei prodotti per la cura dei capelli Kerasilk?

Non è affatto probabile **Estremamente probabile**

0 1 2 3 4 5 6 7 8 9 10

7 - Quanto è probabile che il mio acquisto di prodotti Kerasilk sia semplicemente un gesto abitudinario?

Non è affatto probabile **Estremamente probabile**

0 1 2 3 4 5 6 7 8 9 10

8 - Quanto è probabile che i prodotti Kerasilk contribuiscano a migliorare la mia immagine e autostima?

Non è affatto probabile **Estremamente probabile**
0 1 2 3 4 5 6 7 8 9 10

9 - Quanto è probabile che i prodotti Kerasilk siano convenienti (buon rapporto qualità-prezzo)?

Non è affatto probabile **Estremamente probabile**
0 1 2 3 4 5 6 7 8 9 10

10 - Quanto è probabile che i prodotti Kerasilk suscitino in me emozioni positive (ad es., gioia, orgoglio, ecc.)?

Non è affatto probabile **Estremamente probabile**
0 1 2 3 4 5 6 7 8 9 10

11 - Quanto è probabile che io conosca tutte le caratteristiche dei prodotti Kerasilk?

Non è affatto probabile **Estremamente probabile**
0 1 2 3 4 5 6 7 8 9 10

NON-KERASILK USER BLOCK

6a_ Quanto è probabile che le opinioni di persone per me importanti (ad es., amici, partner, ecc.) possano influenzare una mia eventuale scelta di acquistare i prodotti per la cura dei capelli Kerasilk?

Non è affatto probabile **Estremamente probabile**
0 1 2 3 4 5 6 7 8 9 10

7a_ Quanto è probabile che le mie scelte d'acquisto di prodotti diversi da Kerasilk siano semplicemente frutto di gesti abitudinari?

Non è affatto probabile **Estremamente probabile**
0 1 2 3 4 5 6 7 8 9 10

8a_ Quanto è probabile che i prodotti per la cura dei capelli Kerasilk possano eventualmente contribuire a migliorare la mia immagine e autostima?

Non è affatto probabile **Estremamente probabile**
0 1 2 3 4 5 6 7 8 9 10

9a_ Quanto è probabile che i prodotti Kerasilk possano essere convenienti (buon rapporto qualità-prezzo)?

Non è affatto probabile Estremamente probabile

0 1 2 3 4 5 6 7 8 9 10

10a_ Quanto è probabile che i prodotti Kerasilk, una volta acquistati, possano suscitare in me emozioni positive (ad es., gioia, orgoglio, ecc.)?

Non è affatto probabile Estremamente probabile

0 1 2 3 4 5 6 7 8 9 10

11a_ Quanto è probabile che io possa conoscere tutte le caratteristiche dei prodotti Kerasilk prima di acquistarli?

Non è affatto probabile Estremamente probabile

0 1 2 3 4 5 6 7 8 9 10

12-Quanto sei d'accordo con le seguenti affermazioni?

	Completamente in disaccordo	Abbastanza in disaccordo	Né d'accordo né in disaccordo	Abbastanza d'accordo	Completamente d'accordo
Sarei disposto a pagare di più per acquistare prodotti per la cura dei capelli biologici realizzati con materiali ecologici.	Sarei disposto a pagare di più per acquistare prodotti per la cura dei capelli biologici realizzati con materiali ecologici.	Sarei disposto a pagare di più per acquistare prodotti per la cura dei capelli biologici realizzati con materiali ecologici.	Sarei disposto a pagare di più per acquistare prodotti per la cura dei capelli biologici realizzati con materiali ecologici. Né	Sarei disposto a pagare di più per acquistare prodotti per la cura dei capelli biologici realizzati con materiali ecologici.	Sarei disposto a pagare di più per acquistare prodotti per la cura dei capelli biologici realizzati con materiali ecologici.
Accetterei di spendere denaro extra per acquistare prodotti per la cura dei capelli sostenibili al posto di quelli tradizionali.	Completamente in disaccordo Accetterei di spendere denaro extra per acquistare prodotti per la cura dei capelli sostenibili al posto di quelli tradizionali.	Abbastanza in disaccordo Accetterei di spendere denaro extra per acquistare prodotti per la cura dei capelli sostenibili al posto di quelli tradizionali.	d'accordo né in disaccordo Accetterei di spendere denaro extra per acquistare prodotti per la cura dei capelli sostenibili al posto di quelli tradizionali. Né	Abbastanza d'accordo Accetterei di spendere denaro extra per acquistare prodotti per la cura dei capelli sostenibili al posto di quelli tradizionali.	Completamente d'accordo Accetterei di spendere denaro extra per acquistare prodotti per la cura dei capelli sostenibili al posto di quelli tradizionali.
Sarei disposto a spendere di più per acquistare prodotti per la cura dei capelli sostenibili.	Completamente in disaccordo Sarei disposto a spendere di più per acquistare prodotti per la cura dei capelli sostenibili.	Abbastanza in disaccordo Sarei disposto a spendere di più per acquistare prodotti per la cura dei capelli sostenibili.	d'accordo né in disaccordo Sarei disposto a spendere di più per acquistare prodotti per la cura dei capelli sostenibili. Né	Abbastanza d'accordo Sarei disposto a spendere di più per acquistare prodotti per la cura dei capelli sostenibili.	Completamente d'accordo Sarei disposto a spendere di più per acquistare prodotti per la cura dei capelli sostenibili.

13 - Quanto è probabile che continuerai ad acquistare i prodotti per la cura dei capelli Kerasilk anche nel corso del prossimo anno? (**user**)

Non è affatto probabile Estremamente probabile

0 1 2 3 4 5 6 7 8 9 10

13a - Quanto è probabile che consideri l'acquisto di prodotti per la cura dei capelli Kerasilk nel corso del prossimo anno? (**non user**)

Non è affatto probabile Estremamente probabile

0 1 2 3 4 5 6 7 8 9 10

14 - Qual è il genere che meglio le corrisponde (identità di genere)?

Maschio

Femmina

Genere non-binario / Terzo genere

Preferisco non dirlo

15 - Quale categoria rappresenta meglio la tua età?

Meno di 18

18 - 25

26 - 35

36 - 45

46 - 65

più di 66

16- Quale è il livello dell'istruzione più alto che hai ottenuto?

Inferiore alla scuola superiore

Diploma di scuola superiore

Laurea triennale

Laurea magistrale

Dottorato

17 - A quanto ammonta il tuo reddito annuo complessivo?

Meno di 19.999 €

20.000 € - 39.999 €

40.000 € - 59.999 €

60.000 € - 79.999 €

Più di 80.000 €