International Master of Science in Business Administration

Hair Styling Industry: The Responsiveness of Portuguese Male Consumers – Studio Line Case Study

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ABSTRACT

Dissertation Title: Hair Styling Industry: The Responsiveness of Portuguese Male Consumers – Studio Line Case Study

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This dissertation provides an overview on relevant marketing-related subjects such as brand personality, positioning, consumer behaviour and communication through the analysis of a case study on Studio Line by L'Oréal Paris in Portugal, a Hair Styling brand targeted at the male market. The case study starts by presenting the Hair Styling market in both Europe and Portugal in particular, its evolution and the current barriers and opportunities. Then Studio Line is presented, its evolution, current strategy, positioning and place in the market, both in terms of sales and portfolio. The whole dissertation aims to answer a challenge the brand faces today: How can Studio Line, being the market leader, increase the penetration of Hair Styling in the Portuguese male market? This challenge arises from a constant negative trend of this segment in the Portuguese market, presenting a penetration rate that is half of the European average. Results of the analysis of the Portuguese male market are presented and its implications for Studio Line's strategy are discussed. The dissertation finishes with a Teaching Note, where scholars can find the case study summarized and instructions on how to apply it in a classroom setting.

Keywords: Positioning, Consumer Behaviour, Studio Line, Communication, Brand Personality

RESUMO

Titulo da Dissertação: Indústria de Hair Styling: A Receptividade dos Consumidores Masculinos Portugueses – Caso de Estudo Studio Line

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A presente dissertação aborda temas relacionados com marketing relevantes, tais como personalidade da marca, posicionamento, comportamento do consumidor e comunicação, através da análise de um caso de estudo de Studio Line de L'Oréal Paris em Portugal, uma marca de Hair Styling direccionada ao mercado masculino. O caso de estudo começa por apresentar o mercado de Hair Styling, tanto na Europa como em Portugal, a sua evolução e as presentes barreiras e oportunidades. Depois, a marca Studio Line é apresentada, a sua evolução, estratégia e posicionamento actuais e a sua posição no mercado, tanto em valor como em termos de portfolio. A dissertação tem como objectivo responder a um desafio enfrentado pela marca nos dias de hoje: Como pode Studio Line, sendo líder de mercado, aumentar a penetração de Hair Styling no mercado masculino Português? Este dilema surge de uma tendência negativa constante deste segmento no mercado Português, levando a metade da taxa de penetração da média Europeia. Os resultados da análise do mercado masculino Português são apresentados e as suas implicações para a estratégia de Studio Line são discutidas. A dissertação termina com uma Nota de Ensino, em que académicos poderão encontrar o caso de estudo resumido e instruções em como aplicá-lo em sala de aula.

Palavras-chave: Posicionamento, Comportamento do Consumidor, Studio Line, Comunicação, Personalidade da Marca

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I. RESEARCH PROPOSAL

Introduction

Throughout recent years, cosmetic products and grooming have been expanding from the female market to the male market. 'Men are becoming more like Women' in their consumption habits. But to what extent?

Society's position regarding the acceptance of male appearance and behaviour are changing. Nowadays, the modern culture is demanding the traditional grooming standards from men, which were before expected of women.

According to Chatorvedi Thota, S. (2014), the male grooming products market is growing, due to a new variety of male consumers that are concerned with their outward appearance.

The underlying reasons for this evolution are diverse, such as the importance of beauty and fashion in our society, alongside with the fast growing concerns on health and ageing. Therefore, the modern male consumer is now evolving in terms of its needs, interests and motivations, leading to new behaviours and consumption habits.

Thus, companies are now facing the challenge of 'How to target and communicate with this consumer?'. They need to develop marketing strategies that meet the needs and motivations of this target, in order to recruit them.

Portugal is well known for its traditional habits and behaviours, being a slow-paced market when it comes to trends. Portuguese men still lack confidence in grooming, perceiving it as not being manly. Most of them do not even speak about the use of these kinds of products with other men. The main products for men in the market are still razorblades, shaving products and deodorants; more sophisticated products such as hair and skin care products are still not very accepted.

Reasons for this repress from the male market may include the lack of information and customer service in this segment. Furthermore, Portuguese men, due to their mindset, may also feel shy in asking for information to sales assistants regarding grooming products.

However, as the Portuguese economy improves, the appearance concerns from Portuguese men has been increasing. Because of the media, men started to feel pressured about their appearance and grooming, leading to an increasing importance of male grooming products.

Relevance of the Research

The focus of this dissertation is on Hair Styling products for men, more specifically the receptiveness of the Portuguese male market towards this category. By analysing this specific case study, scholars will be faced with a common challenge of many brands: What should a brand like Studio Line, market leader in this market, do in order to grow in such a small and low profitable industry?

Facing a very traditional and repressed consumer is not an easy task for a company. Therefore, this dissertation will be useful to guide both scholars and managers on the decision-making process, in order to come up with the most effective and suitable solution in this kind of situation.

This study will be relevant for L'Oréal as it may help the company to overcome the main issue of its brand Studio Line, through the presentation of the most effective strategy to adopt in this situation.

Topics like consumer behaviour will be taken into account, in order to understand this consumer's needs, behaviours and barriers. It will also be important to study the different targeting approaches that should be made, having in mind the value maximization and strategy definition.

Problem Statement

The purpose of this study is to understand the underlying reasons on the low receptiveness of the Portuguese male consumer on Hair styling products, alongside finding the most suitable solution for Studio Line to overcome this issue.

Research Questions

1. What are the Portuguese male consumer’s habits regarding hair care?

2. What barriers do Portuguese men face to consume hair styling products?

3. What are the most effective main drivers in Portuguese male consumption to increase penetration in hair styling products?

4. What strategy should Studio Line adopt, in order to overcome the barriers present in this market?

Methodology

For the development of this study, both primary and secondary data were used, in order to answer my research questions.

Regarding primary data, quantitative research was conducted in the form of an online survey administrated to Portuguese men, focusing on consumption habits, brand recall, perceptions and consumption barriers. As for a qualitative research, two focus groups and an in-depth interview to Studio Line’s Product Manager were conducted. The Focus groups were addressed to Portuguese men, regarding their motivations, needs, consumption behaviours and barriers towards this kind of products. All focus groups and the interview were recorded and notes were taken. It was also taken into account in both researches the highest possible diversity of age groups, social classes and backgrounds.

Regarding secondary data, it was collected through L’Oréal’s internal information and market research studies done earlier by Nielsen.

II. LITERATURE REVIEW

This section intends to provide an overview of some topics discussed along my dissertation: Positioning, Consumer Behaviour, Brand Personality and Purchasing Behaviour. This Literature Review was based on previous findings published in relevant academic researches from top journals. By doing so, a richer and deeper understanding of the main subject of this dissertation, Hair Styling male market, is provided.

Self-Expression Through Brands

Salzer-Mörling and Strannegård (2004) define brands as stories about the corporate self, transmitting the personality and core values of the company or product. In this way, the company becomes the storyteller and the market the audience. Thus, these stories can be read as brand images, translated into signs of prestige, status, youth, etc. By absorbing, getting immersed into and using these brands, consumers become part of a play of expression through the use of these signs. Additionally, aside from being brand images, the stories brands tell have to involve and give meaning to its consumption. Hence, branding can be comprehended as a production and distribution of signs that need to be consumed, contextualized and mobilized in order to provide meaning.

Given that most marketers, according to Itty and Moskowitz (2003), have to deal with a world in which all individuals are different, these differences must be identified, understood and satisfied so as to the potential of the product be achieved. Hence, consumption has to be treated as not utilitarian, but as also as a self-expression of individuals (Salzer-Mörling and Strannegård 2004).

This concept leads us to Brand Personality, which is an important dimension of Brand Equity as it provides differentiation and endurance (Aaker, David 2015). According to Balakrishna *et.al* (2009), by purchasing a certain brand or product, consumers achieve, not only maximum benefit of the brand's implemental meaning, but also the capability to express their personalities through this mentioned symbolic meaning. Thus, the more the consumers perceive a brand to have personality dimensions, the higher the likelihood for them to develop preference.

Nowadays, according to Crosno et. al (2011), due to an economically changing environment, brand managers are investing in Brand Personality. By doing so, they can access a more refined strategic tool that allows them to increase levels of loyalty, to influence consumer preferences and to encourage self-expression. As a result, product differentiation and brand associations will be heightened. According to Aaker (2015), through brands an individual can tell others what he values and how he lives, reaffirming to himself what is important in his life.

However, as cultural background can influence brand personality's perception, it is important to identify and reorganize the cultural differences in brand personality (Balakrishna et. al 2009).

Male-Expression vs. Female-Expression

According to Grohmann, Bianca (2009), when using brands for self-expression motives, consumers use masculine and feminine personality traits associated with a brand so as to highlight their own level of masculinity and femininity. Therefore, brands have the need to associate with these personality traits and, in order to do so, they have to engage in positioning strategies.

Positioning, according to Maggard, John P. (1976), reflects the product's form, package size and price in comparison to competition. However, the author also states that the recognition of the importance of the product and the company's image that is felt in this new era creates the need to position a product or brand in the consumers' minds. Goodstein and Kalra (1998) add that positioning can take many forms: it can differentiate brands in terms of attributes or image; associate brands by emphasizing resemblances between market competitors; or doing price promotion of an advertised brand, in order to consumers focus on that.

Regarding the gender differences in positioning, Grohmann (2009), presents a scale applicable to brands focused in symbolic, utilitarian or mixed product categories: MBP/FBP, which can be translated as masculine brand positioning (MBP) and feminine brand positioning (FBP). The author considers these two traits to be necessary for two different reasons: First, due to the brand personality's multidimensional nature and to the approachability of masculinity and femininity as human personality dimensions; secondly, due to the need of self-expression of consumers in terms of masculinity or femininity through brands and consumption. Therefore, a brand can be classified into four levels of MBP/FBP: 1. High-masculine/Low-feminine; 2. Low-masculine/Low-feminine, which are undifferentiated brands; 3. Low-masculine/High-feminine; 4. High-masculine/High-feminine, which are asexual brands.

An example, presented by Guptha and Malik (2014), in order to increase the association with personality traits, is celebrity endorsement. The authors state that celebrity endorsers are effective in giving meaning to brands, as their symbolic presences refer group associations. Thus, the use of a masculine/feminine endorser increases consumers' associations of masculine/feminine personality traits with the brand (Grohmann, Bianca 2009).

Furthermore, according to Grohmann, Bianca (2009), through the choice of masculine/feminine endorsers in advertisements, marketers are able to shape gender dimensions of brand personality. In this way, they will influence positively consumer responses in terms of behaviour, attitudes and affection when they are consistent with the consumers' gender identity, enabling them to express themselves in this dimension.

Contemporary Male Consumer

In consumer behaviour, the concept of purchase involvement is usually referred to a person's perceived relevance of an object based on its needs, values and interests (Bao, Yeqing *et al.* 2005, Blocb and Richins 1983; Mitra 1995; Zaichkowsky 1985). According to Bao, Yeqing *et al.* (2005) and Traylor (1981), a product category may be more or less central to people's lives, depending on the involvement the person has with the product, their sense of identity and their relationship with the rest of the world.

Defining Consumer's Gender Identity

According to Avery, Jill (2012), nowadays marketers are trying to target their brands to both genders. They take products that were before targeted to one sex and target them to the other. Both men and women, more and more are engaging in gender-bending consumption, choosing products/services of the opposite sex in order to support new ideas and play with gender definitions. This new postmodern thinking raises a new question: Is gender no longer important in consumption?

There are separate male and female consumer cultures, which define the suitability of products to each gender (Penaloza 1994). However, other researchers defend that possessions, brands and consumption behaviours are already gendered (Fischer and Arnould 1990, Kozinets, Duhachek *et al.* 2004, Wallendorf and Arnould 1991). Men may present certain behaviour levels that were traditionally regarded as feminine and the same may happen with women (Bem, Sandra L. 1974). Palan, Kay M. (2001) states that one can present varying levels of both masculinity and femininity.

Therefore, according to Avery, Jill (2012), through consumption people create and enhance their gender identities, letting its possessions function as gender identity markers.

Nevertheless, as stated by Kramer (2005), sometimes when people do gender-bending consumption by co-opting products of the opposite sex, they are called into account and their gender identity is questioned. In the case of male consumers, they are often perceived as metrosexual. Therefore, they enhance their masculinity through consumption, in order to avoid the fear of others perceiving them as effeminate or homosexual (Carrigan *et al*., 1985; Kimmel, 1996).

The metrosexual concept came to light as an alternative to the traditional definition of masculinity, allowing men to take consumption decisions that were not acceptable before. This type of consumer is defined as a young, urban and heterosexual man that began to buy products or category of products that were once associated with women or homosexual men (Bordo, 1999, Crane, 1999).

The Man-of-Action Hero

Given this new postmodern era kind of men, gender-bending consumption is becoming more common. According to Avery, Jill (2012), *"metrosexuals redefined the boundaries of masculine consumption by disarticulating practices that were previously associated with women and homosexuals and resignifying them as appropriate for heterosexual men".* Moreover, the contemporary men are using their consumption habits to turn themselves in a new kind of men: the man-of-action hero.

The Man-of-action hero was studied by Holt and Thompson (2004), in which they define it as man who is between a rebel and a breadwinner. A breadwinner is a man who aims for success. He works hard and is a dependable, yet reserved collaborator in a corporate environment. It's reserved and dependable. As for the rebel man, he relies on its determination and strength to conquer nature.

According to Holt and Thompson (2004), the Man-of-Action Hero blends these two models, by being a rough individualist and at the same time maintaining the allegiance to collective interests. They are men with courage, vision and spontaneous spirit. Moreover, they are adventurous and untamed, but at the same time contributing to a greater social good. They are those who can get further in life, by building great new markets and inventing creative and disruptive solutions.

Consumers' Decision-Making Process

According to Bakewell and Mitchell (2004), when engaging in the marketplace, consumers follow certain purchasing strategies and rules to guide their decision-making and consequently show relatively congruent decision-making styles. The consumer decision-making style is a mental orientation that characterizes the approach to choice making of the consumer. Moreover, the style of each consumer can be developed to a shopping personality that is relatively fixed and predictable.

Bakewell and Mitchell (2004) defend that there are three decision-making style groups: utilitarian, social/conspicuous and undesirable. While women are more associated with social/conspicuous styles, men are more associated with utilitarian styles, which are concerned with perfectionism and price consciousness as they value quality and price. As for the social/conspicuous styles, these are concerned with novelty, fashion, recreational shopping consciousness and brand loyalty.

Several researchers discovered important differences between men and women in their information processing, emotion expression and purchasing behaviour (Adjei, Mavis T. *et. al* 2006). As men are more confident in their capability to process information than women, they tend to look for specific information throughout their decision-making process. In this way, Bakewell and Mitchell (2004) suggest that retailers that target male consumers should provide more simplified store and point-of-sale information.

Furthermore, Bijmolt, Tammo H.A. *et. al* (2009) states that differences between genders regarding consumer loyalty is still little known. The authors conducted studies to evaluate these differences, depending on the object of loyalty and found that whereas women are more loyal to individuals, being individual service providers, men demonstrate higher levels of loyalty towards groups, such as companies. However, the perceived gender of the company or individual service provider and its match with the consumer's gender does not affect their loyalty to that same company/individual service provider. The reasoning behind these findings lies on the self-construal of both genders. According to Bijmolt, Tammo H.A. *et. al* (2009), women view themselves as interdependent, attempting to feel connected to other people. Men, on the other hand, view themselves as independent, longing for uniqueness and individualism. Therefore, the male self-construal is more focused on group relationships and female self-construal on individual ones.

Adjei, Mavis T. *et. al* (2006) suggest that, given that females are more loyal to local merchants and males to companies, communication and loyalty programs have to be adapted to both genders. Local merchants could increase loyalty by developing different programs with specific motives to the different genders. For example, according to the authors, when targeting men, a more visual representation of information would be best, as males are more prone to information seeking and convenience, whereas women value uniqueness, social interaction and browsing.

Therefore, according to Bijmolt, Tammo H.A. *et al.* (2009), if customer loyalty between genders differ, different selling approaches have to be made to each gender, since they present different customer value levels and react differently to marketing programs that aim to enhance customer loyalty.

What was once seen as being solely for female consumers, like cosmetics and fashion, nowadays it has become lucrative for companies in these markets to target male consumers (Bakewell and Mitchell 2004). However, according to the same authors, young male consumers are becoming more involved in shopping and many product categories that were once seen as female. Yet, their decision-making process is different from women's.

Bakewell and Mitchell (2006) state that, when it comes to brand consciousness, males present the same levels as females, reflecting men's desire to use shopping to demonstrate superiority. Yet, regarding young male consumers, the trait of "store promiscuity" arises, suggesting that these consumers are indifferent to the store or brand, preferring to shop at different places.

As men perceive shopping as an unpleasant activity, they spend less time doing it than women (Bakewell and Mitchell 2004). Thus, according to the authors, marketers should provide loyalty programs, such as loyalty cards and communication strategies, in order to increase brand awareness and guarantee low prices, which will consequently reduce purchasing search time for men.

When it comes to communicating with male consumers, Bakewell and Mitchell (2004) suggest that it is relevant to keep in mind that some of these consumers are not interested in fashion, as they associate it to females. Therefore, retailers offering likewise products should avoid communication appeals using these terms.

According to Putrevu (2004), women pertain a more integrated and symmetrical brain, meaning that verbal description may be beneficial to them, unlike men, who pertain a specialized hemispheric brain, suggesting they need nonverbal reinforcement. Therefore, product attributes are highlighted differently across genders and different judgments are also made regarding advertised product information.

The authors refers that men are more keen on products whose messages contain agentic sentiments, meaning they focus on claims that affect them directly, whereas women prefer the ones containing communal elements, meaning they like to identify the interrelationships between attributes. The reasoning behind it lies in the differences in aggression, affiliation and social roles between genders.

Therefore, according to Alreck and Settle (2002), in order to succeed, companies should recognize and get familiar with the gender differences, instead of ignoring them and work under false assumptions. Thus, regarding male consumers, simple ads focusing on few key attributes or the ones that highlight the differential advantage are preferable, since men benefit from visual reinforcement and engage in brand comparisons (Putrevu, Sanjay 2004).

III. CASE STUDY

Hair Styling Industry

Hair Styling was brought to the European market in the 1980's, as more elaborate hairstyles were becoming trendy. Therefore, in order for people to be able to recreate these hairstyles regardless of their hair types, specific products had to be used. These styling agents took at first the form of hairsprays and hair gels. However, a decade after, several European countries entered and economic recession, which caused sales to drop sharply, as this product category was seen as an unnecessary expense.

Hair styling comprises three different segments: 1. Hairspray, which can take the form of the typical hairspray, meant for fixing the hairstyle; of a heat spray, meant to protect the hair from the heat of the blow-dryer or other styling heat tools; or even as a special effect spray, meant to help create special hairstyles like "beach waves" or other trendy ones. 2. Mousse, which has a foamy texture and is meant to help texturize the hair and fixing the hairstyle. 3. Hair Gel, which is usually targeted to male consumers. This last one can take the form of an actual gel, meant to help create and fix an hairstyle, or a Hair Wax, meant for the same purpose as the hair gel, but in a more textured and natural way.

European Market

The Hair Care market consists in Shampoos, Conditioners, Hair colorants, Hair treatments and Styling agents. On a global basis, this market has been growing at a moderate rate, with expectations to continue in the next periods. According to a Marketline's study on the Global Hair Care Industry, this market achieved total revenues of € 452,161M in 2014, which represented a 3.3% value growth and a 3.7% volume growth from 2010, meaning that consumption is actually increasing.

The European market, which represents 33% of the global market, had a growth rate of 1.7% over the same period, reaching € 149,167M of revenues. In terms of volume, it was noticed a 1% growth rate, meaning that consumption is increasing, but so as prices or product margins.

In this market, the segments that were more profitable in 2014 were Shampoo and Hair

Colorants (37.5% and 25.2% of market's overall value, respectively).

However, it is likely that the European market's growth will slow down during the following years, as price competition becomes heavier, some products reach its maturity state and retailers' private labels become more consolidated.

Focusing on Hair Styling, in the same period, this segment represented 20.8% of the European Hair Care market, accounting for € 31,027M of revenues and 785M units. However, this segment has a 14% penetration rate among European consumers, being the highest rates in Germany and Italy, followed by United Kingdom and Spain.

With the constant evolution of globalization, different cultures are becoming closer. Therefore, trends in every single market are becoming global trends, especially regarding the beauty industry. Nowadays, when searching for new products or hairstyling trends, consumers all over the world have access to global content. Through the Internet, they can easily obtain knowledge and skills from several different cultures. Therefore, when something becomes trendy somewhere in the world, such as Hair Styling, there is a high probability to become also trendy elsewhere.

L'Oréal Group

L'Oréal is a French company that markets make-up, perfumes, hair and skin care products. The company's product scope is sold under well-known brands, operating in 130 countries worldwide.

L'Oréal started as small company by the creation of Eugène Schueller in 1909, focused on hair dyes that he formulated and sold to Parisian hairdressers. However, only in 1939, it went by the name of L'Oréal, instead of Société des Teintures Inoffensives pour Cheveux. Since then, it has been evolving in the beauty industry, becoming the number one cosmetic group in the world.

After Eugène Schueller's death, François Dalle takes over, providing the group a visionary mindset, positioning L'Oréal in new market sectors and new distribution channels and turning beauty more accessible to consumers.

From this moment on, the motto "Beauty for All" started to take shape.

In 2011, Jean-Paul Agon became the Chairman and CEO of the L'Oréal Group.

Nowadays, the company is split into four main branches: Professional products, Consumer products, Luxury products and Active cosmetics.

The Luxury division markets premium brands to high-end consumers, who value uniqueness and are willing to pay a price premium. These products are distributed in selective retail outlets, perfumeries, department stores and online websites.

The Active cosmetics division markets dermo-cosmetic products, distributing them in pharmacies and specialist retailers.

The Professional division is focused on Hair Care and Hair Styling products for hairdressers that use and sell the products in their own salons.

The Consumer Products division is focused on mass-market retailing, offering beauty and cosmetics at an affordable price. The core brand of the company is situated in this division, L'Oréal Paris, which is the nº1 brand worldwide in beauty.

According to Jean-Paul Agon, the main goal of L'Oréal is to get one more billion consumers worldwide, pursuing its "Beauty for all" mission. In an interview in the Annual Financial Report of 2014, the CEO stated that L'Oréal's strategy is to become a *"New L'Oréal of the 21st century: universal, digital and sustainable"*.

The year of 2014 was marked by the progress and transformation within the company, as it revealed several launches, gains of market share and adaptability to a fast-moving environment, especially through digitalization. Jean-Paul Agon mentions the beginning of a "huge simplification initiative", as he believes that as more complex the environment becomes, the higher is the need to simplify the approach to be responsive to the market. "*We want to be a leader with the spirit of a challenger, and a large company with the spirit of a start-up"*.

In 2014, L'Oréal achieved a new record in profitability of 17.3%, recording revenues of € 27,083M, an increase of 1.8% from the previous year. This progress was especially positive in Western Europe, which is an area that it is very important for the group, revealing a strong profitability.

Main European Players

The competition in the European market is boosted by the presence of international companies, which have a strong position, due to their scale economies, global reach and high investment in product development and brand identity. Therefore, the leading companies in this market are L'Oréal, Proctor & Gamble, Henkel and Unilever.

- **Proctor & Gamble**

Proctor & Gamble is a multinational company that manufactures and markets branded consumer products. The company started as a soap and candle business in Cincinnati in 1837 by William Proctor and James Gamble.

Its business units are split into five segments: health care, personal care, beauty, grooming and fabric and home care.

- **Henkel**

Fritz Henkel founded Henkel in 1876 with two partners in Aache. It started as a laundry detergent company, based on sodium silicate, which they named Universal-Waschmittel. However, nowadays, it has become a global leader in brands and technologies, holding several leading market positions in both consumer and industrial sectors.

The company is split into three business units: Laundry and home care, Beauty care and Adhesive technologies.

- **Unilever**

Unilever was founded in 1929 by the merger of Lever Brother and Margarine Unie, operating in the production of soap and margarine. After almost 100 years, Unilever has more than 400 brands, which serve two billion people everyday. These brands are focused on the wellbeing and health of the consumer, being present in their lives every single day.

Unilever is split into three business units: Food industry, Beauty care and Laundry and home care.

The Hair Styling Industry in Portugal

According to a study conducted by Marketline in 2013 about the consumer habits in Portugal, due to the economic and financial crisis highly suffered in this country, the Portuguese consumers' purchasing decisions are revolving around discounts and promotions. These consumers tend to buy different products at different locations according to price fluctuations. They are also cutting from their shopping list products that they do not feel are indispensable, which is the case of Hair Styling products.

Portuguese men and women, in a general sense, follow the European beauty standards. However, the perception of these standards is changing towards greater diversity. As the media, celebrities and social networks have more influence in consumers' minds, the pattern for which they stand for in terms of attractiveness is changing into a broader spectrum of beauty perceptions, focusing on the wide diversity of appearance among Portuguese people.

When looking for information regarding a certain product or tips about a category, consumers no longer go to the newspaper or watch advertisings. Instead, they go online. Bloggers have spread in last few years, winning the power of stating what consumers should buy, how to use the products and what they should do. They are today's greatest opinion-makers. Therefore, brands take advantage of this source that is said to be trustworthy, as "real people" are giving their opinions and reviews on several products. Moreover, by working with these bloggers, brands get advertisement at a lower cost and with higher effectiveness. They are the trendsetters in the beauty industry in Portugal.

The Portuguese Hair Styling market has been decreasing since 2013 and it is expected to keep this pace over the next years or to remain stable.

According to Nielsen's database, in 2014, the Portuguese Hair Styling market achieved € 19.8M in revenues, representing a decline of -2.4% from the previous year. In terms of volume, the market consumption decreased by -1.3%, reaching 5.5M units, meaning that either the prices are lower or consumption is being made mostly through promotion. In YTD 15, the percentage of sales under promotion is 24%.

The Hairspray segment was the most lucrative in 2014, achieving a total of € 8.7M in revenues, representing 43.9% of the market. Regarding its evolution, the segment has remained flat, with a -0.7% growth rate.

Regarding Total Hair Gel segment, which represents 34.7% of the market, is slightly decreasing with a -2.4% growth rate. In 2014 accounted for a total of € 6.9M in revenues and 1.9M units with the same growth rate, meaning the segment is stable and has a low promotion level.

In the same period, the Mousse segment achieved a total of € 4.2M in revenues, with a -5.8% growth rate, being the segment that it is most in decline, representing 21.4% of the market. ***(Exhibit 1)***

L'Oréal Paris

L'Oréal Paris is the core brand of the L'Oréal Group. Being the nº1 beauty brand sold on mass-market retailing channels, it provides unique and expert products accessible to everyone. It offers to both genders beauty products of every category, with the excellence of its Research Laboratories.

L'Oréal Paris has a unique vision of beauty, which is supported by several international ambassadors. Its ambassadors are worldwide icons from the cinema, music and fashion industries, with excellent careers, who stand for the brand's famous motto "Because you're worth it". This timeless signature represents the essence of L'Oréal Paris, which is focused on making their consumers embrace their unique beauty and reinforce their self-esteem.

Selling 50 products per second worldwide, L'Oréal Paris dedicates itself to the celebration of beauty diversification.

The brand is divided into three separate categories, which involve several brands: Hygiene, Make-up, Hair Color and Hair Care.

The brand's Hair Care category in Portugal is under the management of António Frazão, along with the guidance of Tiago Melo, who is the Hair Care Marketing Manager of this division. This structure works along with the Garnier team, which is also under the guidance of Tiago Melo.

Competitive Analysis

In the Hair Styling market, L'Oréal Paris is market leader with a 28.3% market share in 2014.

The brand has remained stable and flat over the years, without big oscillations in the shares of both its brands: Elnett and Studio Line.

Despite only offering hairsprays, according to António Frazão, Elnett is known for being a cash cow or the goose that lays the golden eggs. With a 19% market share in 2014, the brand remains stable with high profits, regardless of the declining market trend.

In the Hair Styling market, L'Oréal Paris' main competitors are: Pantene, Nivea, Fructis Style and Private labels.

- **Pantene**

Pantene is part of the group Procter & Gamble and it was established in 1945. The brand was launched as a superior Hair Care line in Europe, inspired in the pantenol ingredient. In Portugal it is the 2nd leading brand, after Elnett, presenting a 13.3% market share in 2014. Regarding its product portfolio, Pantene is present in all of the three segments: Hairspray, Hair Gel and Mousse.

- **Nivea**

Nivea is a worldwide known brand, more specifically for its skin care products. It was launched in 1911 and is now part of the Beiersdorf Company. In the Portuguese Hair Styling market, Nivea is positioned at 3rd place with a 10.3% market share in 2014, presenting a 11% growth rate, meaning it is conquering at a fast pace a better position in the market.

Its portfolio covers all the market's segments, which are split into the following ranges: Diamond Gloss, Volume Sensation, Vital, Fixation, Flexible Curls and Men. The Men range is the most profitable in this category, presenting a 3.8% market share. This range's focus is on Hair Gel accounting for 37% of the brand's profitability in this market.

- **Fructis Style**

Fructis Style is a Garnier brand, part of the L'Oréal group. It was launched in the 90's with the purpose of providing fruit-based products to all types of consumers. Despite presenting in 2014 a 10.1% market share in Hair Styling, the brand is decreasing above the market growth rate, losing its share.

Fructis Style is present in all segments of the market. However, its main focus is on Mousse and Hair Gel. These products are split into four ranges: Kit Alisamento, Protector de Calor, Hidra Caracóis and Men. This last range accounts for 49% of the brand's profitability, presenting a 4.9% market share.

- **Private Labels**

Large retailers in Portugal, such as Sonae and Jerónimo Martins, are creating private labels for its supermarkets/hypermarkets.

These brands are winning market power over time as consumers present negative price elasticity for this product category. In 2014, these brands all together represented 9.5% of the Hair Styling market, which is a very close position to the greatest players in the market.

Hair Styling Targeting Portuguese Male Consumers

As stated above, Hair Styling is split into three segments: Hairspray, Mousse and Hair Gel. This last segment targets male consumers, whereas in the other segments it happens the opposite. This segment covers both Hair Gel itself and Hair Wax, both with the purpose to fix and style the hair of male consumers.

While the average penetration rate of Total Hair Gel in Europe is 14%, in Portugal specifically this percentage is much lower, 6%, in which 85% use it every week. According to the Hair Care and Styling Product Manager of L'Oréal Paris, António Frazão, the reason behind this gap is the Portuguese style, fashion and culture. The same way that the Portuguese women wear less make-up than in other European countries, the same happens regarding men's use of hair styling products. Portuguese people are very traditional when it comes to beauty and fashion, valuing a natural, soft and clean look. *"They like simple and natural and this is what sells the most"*. Moreover, in general, Portuguese men perceive Hair Gel as an expensive product that leaves a too elaborate and unnatural hairstyle with a dirty appearance. They do not feel the need to use it and believe that it damages the hair. However, according to a study on the Consumer Lifestyles in Portugal conducted by Marketline, Portuguese male consumers are becoming more concerned with their physical appearance and image and this trend is believed to continue growing.

The Hair Gel segment in Portugal is facing a negative growth trend, with the market decreasing year after year and period after period. According to the results observed in the Nielsen database, one can expect the market to keep on decreasing throughout the next years or to be stable.

With a -2.4% growth rate from 2013 to 2014 in both value and volume, the market presents a low promotion level, being consistent with the value generated and units consumed.

Splitting the segment into Hair Gel and Hair Wax, it can be observed that Portuguese male consumers have clear preferences over one product to another. In 2014 Hair Gel represented 82% of the market, while Hair Wax the other 18%. Therefore, it can be stated that the 6% of Portuguese men that use these products prefer hair gel over wax. However, this trend has been changing in recent years, as sales of wax have been increasing and gel consumption has been slowing down: in September 2015 YTD, Hair Wax increased 5% while Hair Gel declined by the same -5%, indicating that hair gel users are directly switching to hair wax over time. ***(Exhibit 2)***

The reason behind this switch is the need for new textures and more natural, simple looks. The 80's extravagant and different hairstyles are no longer seen as fashionable or trendy. Nowadays, both in Portugal and the rest of Europe prevails a more business casual look, with cleaner hairstyles.

The same results happen in terms of volume, in which Hair Wax presents a growth rate of 4% from 2013 to 2014 and 10% YTD 2015, whereas Hair Gel -3% and -2%, respectively.

Regarding sales promotion, in Portugal there is a consistent price war between Sonae and Jerónimo Martins, which are the largest retailers. Therefore, the market presents heavy price promotions. Whereas in some countries, like Germany for example, in which the trend is an everyday low price, due to the strong positions of discounters and retailers, in Portugal it is more common a High Low strategy. The reasoning behind it is the price sensitivity and low price elasticity of Portuguese consumers, which leads to a higher importance of promoted products on their purchasing decisions. In this way, what could also explain the shift of consumers between Hair Gel and Hair Wax is the fact that this last one presents a promotional level superior to the segment's average (32% vs. 29%), whereas Hair Gel follows the average values.

Studio Line

Heritage

"Stu, stu, stu, Studio Line!". The slogan that left a mark on a whole generation, shocking the consumers, which until then had a "mommy-style" look.

By embracing the 80's style, with several sources of inspiration and hairstyles becoming a mark of individual expression, L'Oréal creates Studio Line.

Studio Line started as a Hair Styling toolbox that allowed its consumers to be the creators of their hairstyles. The art of designing and sculpting one's hair became an everyday ritual all over the world. At the time, it was extremely revolutionary. The TV commercials presented a very breakthrough brand in terms of communication, in a more punk style, which consumers were not used to. Even the hairstyles presented were completely different from what people were used to wearing.

According to António Frazão, Studio Line was perceived as the latest trend, but in a men's only Hair Styling.

Based on its core characteristic, freedom, Studio Line allowed its consumers to create their own hairstyles with unique and innovative formulas. It was the trendiest and most *avant-garde* brand of the time.

The goal was to educate consumers on this whole new product category along with loyalty creation. Nowadays, Studio Line is still recalled for its extravagant and pioneering spirit on hairstyle trends.

Brand's Portfolio

Studio Line's portfolio can be split in terms of looks and strength, in order to provide the consumers the right range for each one of them. The brand offers several products under the following ranges: Indestructible, Special FX, Mineral FX and TXT. ***(Exhibit 3)***

Indestructible is a range targeted to men who enjoy partying and want to keep their hairstyle in place the whole night. It states that it resists three times more than a traditional hair gel. Due to its technology, it allows to create all sorts of hairstyles without a sticky look.

Special FX is a range focused on men who want to create special kinds of looks. This range allows the consumer to work on special, messy and structured hairstyles with strong personality. It offers a non-greasy and fibrous look.

Mineral FX is targeting those who prefer a natural look and are concerned about the care of their hair. This range is enriched with active minerals, preventing the hair to fall, flap and break. Mineral FX has an invisible, residue free effect, allowing for a perfectly natural and long-lasting look.

Regarding TXT, the newest and most modern range of Studio Line, is focused on the new generation of texturizing hairstyles. Reworkable smooth clays, with micro powders for a non-greasy, shine and residue free look. Ideal for natural tamed and refined hairstyles.

Consumer Analysis

According to António Frazão, the typical Studio Line consumer is the one that is not that price sensitive, since this is one of the most expensive brands in the market. He is young, between 25 and 35 years old, and cares about the brand, values its quality, positioning and heritage. He is also someone who looks for different textures that cannot find in the most basic gels or private labels. The Hair Gel consumer looks for the final look or texture. The Indestructible consumer is the one who values endurance, as this range has a very strong formula. However, due to the Hair Wax trend, the consumers are looking for new textures, clays and pastes that provide an innovative and invisible texture allowing for different looks, such as the matt look.

In order to increase market penetration, according to António Frazão, the communication of Studio Line should be very straightforward. Male consumers present higher loyalty levels towards brands than female consumers. Although, on a shopper level, women are easily convinced to try new products and are more sensitive to sales promotions, men feel and act the same way but on a lower scale. Moreover, considering that the brand's performance, without media promotion and advertisement, is still positive or flat, the loyalty and satisfaction with the brand from these male consumers is reflected. Therefore, the communication to this target, according to António Frazão, should be done in two parts. The first should be focused on established and loyal consumers, by investing in new textures, which are more differentiating than the rest of products in the market, in order to maintain these consumers. The second one should be focused on recruiting new consumers, by focusing communication on sports newspapers, sports channels and in digital platforms, where marketing is more frequently done. However, a deeper research and intensive work had to be done, in order to create a new trend and get endorsers and opinion leaders to use it and create the "copycat" effect.

Typically, the first-time consumer of hair care products does not understand the differentiation among the products and has almost no knowledge on this category. Therefore, in order to overcome this issue, Studio Line should have on the point of sale a simple explanation of the promises and benefits of each product, facilitating the purchasing decision process.

As a leading brand, and hence as a category developer, Studio Line should be a pioneer in this process. However, the way styling is used nowadays does not appeal to non-consumers. Although some people openly use these products, with shiny and greasy effects, which are noticeable that styling products are being used, many consumers use hair wax that is not noticeable. The looks themselves do not help to the spread of Hair Gel.

Positioning

Since its creation, Studio Line's DNA has remained virtually unchanged. The basis of its positioning is still irreverence, differentiation and tendency. However there were several restructurings throughout time. The packaging changed along with the brand, in order to become more modern. *"Times are not the same. At the time (Studio Line) was very out-of-the-box, but nowadays it is hard to differentiate itself from the competition",* says António Frazão.

Internationally, Studio Line is not a priority for L'Oréal Paris in comparison to other beauty segments. Despite being a relevant market in which the brand has a strong position, it is still much lower than other business segments in which L'Oréal Paris is present. Therefore, L'Oréal Paris tends to draw its attention to other segments.

While the brand's performance has remained flat in the last few years, the drop is not significant enough for managers to be alarmed. The restructurings mentioned did not solve the issue, because, according to António Frazão, it had to do with the brand's DNA and reason to exist. *"Studio Line was restructured and modernized, but the basis was not solved".*

The biggest limitation in the Portuguese market is the actual usage of Hair Gel, or lack there of. It is a European trend and, yet, the Portuguese market is negative. Even though the results were worse two years ago, is still decreasing at -2.4%, meaning the demand is not being perceived on a market data level. *"Even if Studio Line invests more in the market, the turnover will never be relevant".* However, 2014 was a very important mark for Studio Line, as the losses stabilized for the first time since 2011.

Marketing Mix

In 2013, Studio Line was able to stall the losses with that year's innovation range Matt & Messy, which was a Hair Wax that gave a natural and matt look, without shine. In this way, the brand kept up with the market in absolute terms in 2014.

On what concerns pricing, Studio Line presents the highest prices in the market, with an average price without promotion of 5.36€ versus 3.48€ of the market's average price (+35%). However, its prices vary across customers, as retailers can set the price they want. Studio Line only presents them the RRP (Recommended Retail Price). Regarding sales promotion, Studio Line presents a level much lower than the market's average (8% vs. 29%), meaning that, even presenting the highest prices in the market and still being the market leader, its products have quality and the consumers have a clear preference for this brand.

When it comes to media investments, L'Oréal Paris does not allocate any budget and investment for media in Studio Line since 2012. Until then, the main advertisement campaigns of Studio Line were made in music festivals, which are quite popular in Portugal. In that way, the brand could stay closer to its target audience, building brand awareness. However, since it is not a top priority brand, L'Oréal Paris's management in Portugal prefers to allocate these investments to other categories, such as Hair Care and Skin Care, the top categories of the mother brand.

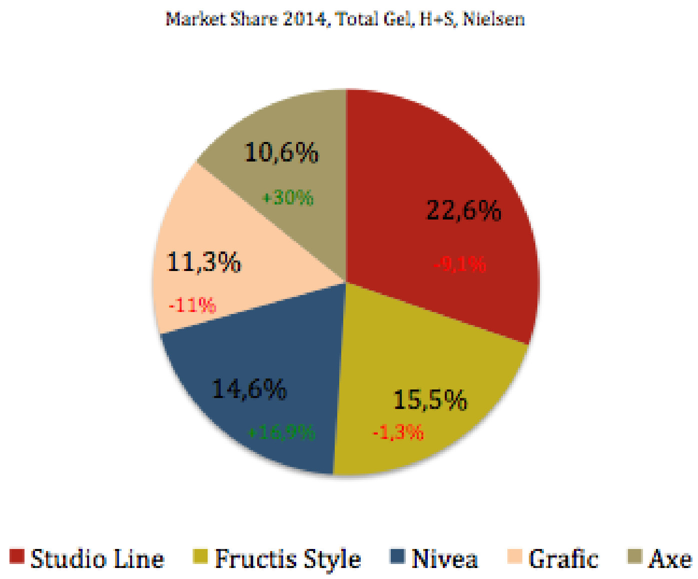
Competitive Analysis

This present year, Studio Line managed to work its way up in the market with a 4.9% growth rate YTD. Despite not having any media support, the foundation of the brand is stable and healthy, which is positive to plan future strategies.

Being a market leader with a 22.6% market share in 2014, it is in its job to extend the market, increasing the penetration in this category. Regarding the brand's different ranges, the ones more focused on Hair Wax are the ones that present a positive growth rate YTD, whereas the ones focused on Hair Gel face the opposite, proving that the shift between these two products happens also on a brand level. The Indestructible range is the brand's most profitable range, with a 9.5% market share, accounting for 39% of the brand. Although it was the first Studio Line range to be launched into the market, it still presents a positive growth rate. TXT is also a range worth mentioning, since it's the one with the highest growth rate YTD (188%).

In volume terms, Studio Line had a -12.2% growth rate from 2013 to 2014, revealing a higher loss in market consumption than in value. This means that Studio Line's consumers either are consuming less or have switched to other brands. As this brand has a low promotion percentage, the value has not decreased as much as volume. However, this low promotional level on a long-term may cost Studio Line the loss of even more consumers.

Regarding other players in the market, Studio Line has four main competitors: Fructis Style, Nivea, Grafic and Axe.



- **Fructis Style**

The Garnier's most profitable brand in Hair Styling has been decreasing since 2013 at a -1.3% growth rate, achieving in 2014 a 15.5% market share, being the 2nd leading brand in the market. However, as the market is dropping at a faster rate, the brand is winning market share, presenting a 0.2% increase from the previous year.

Despite closing the year of 2014 with a higher share, in YTD 2015 Fructis Style lost 1.7% share, reaching 13.8% in September, a -17.3% decrease YTD. This reduction allowed Nivea to surpass the brand in YTD. Moreover, the brand's level of promotion is below the market average (24% vs. 29%), which might have contributed to this performance.

Furthermore, given that the brand's portfolio consists of only one Hair Wax and seven Hair Gels and that the market's preferences are switching from this last one to the first, Fructis Style might be losing consumers to other brands that understand better their needs.

- **Nivea**

Nivea has been counter cycling the market with a 16.9% growth rate from 2013 to 2014, achieving a 14.6% market share. In September 2015, was able to increase even more its share to 16.4% YTD, surpassing Fructis Style.

The brand's performance is outstanding given that the market and most brands are facing turbulent times. The reasoning behind this performance could be the growth of its single Hair Wax (16% from 2013 to 2014 and 20.7% YTD 2015), given the market's trend, and/or it could be its 39% of promotion, which is significantly above the market's average.

- **Axe**

Axe is a male grooming brand owned by Unilever. It was launched in 1983, in France, targeting young male consumers.

Regarding Total Hair Gel in Portugal, Axe is one of the leading brands in the market, presenting the highest growth rates, both from 2013 to 2014 and YTD 2015 (30% and 26%, respectively). By not following the negative trend of the market, Axe is able to win a significant amount of share in the market (10.6% in 2014). Actually, in 2015, the brand has been competing its position in the market with Grafic, surpassing it by 1.1% market share in September.

The reasoning behind this growth when the market is declining is probably due to its portfolio, as it contains three Hair Waxes and four Hair Gels, satisfying all sorts of consumers. In this way, the brand is capable to support the Gel-to-wax shift in the market, as well as the Hair Gel loyal consumers. Moreover, Axe is the brand that provides the highest level of promotion in the market (52%), which could also explain this increase on its sales and market share.

- **Grafic**

Grafic is the other Hair Styling brand from Garnier. Its portfolio is focused on Hair Gel and Mousses. Regarding Total Hair Gel, Grafic only provides the Hair Gel per se, detaining an 11.3% market share in 2014. However, given the Gel-to-wax shift in the market, Grafic has been losing its share at -11% growth rate, below the market, meaning that not only the brand is losing due to a decrease in the market, but also due to consumer switches to other brands. Despite practicing a 45% promotion level, the brand keeps on losing its position in the market.

Challenge: What should Studio Line do in such a low penetrated market that is decreasing year after year?

Throughout the case study, Studio Line's business in Portugal was addressed, regarding its history, foundations and current performance. The brand's competitive environment was analysed as well as its target audience. Therefore, as a result, it became clear that while Studio Line is the nº1 brand in Hair Gel in Portugal, its turnover is not significant. It was also found that the reasoning behind it has to do with the Portuguese male consumer behaviour. Portuguese men view Hair Styling products as unnecessary and for hairstyles that are too ellaborate. Moreover, the masculinity definition in Portugal instead of being set as "Man-of-action hero", is still much set as a "Breadwinner", the hard-working man who lives to work and thinks that beauty products or any derivatives are for homosexual or metrosexual men.

It was also mentioned that Studio Line is not a top priority for L'Oréal Paris. Despite being the market leader in its segment, the brand is considered a "question mark" on a BCG matrix, due to its turnover and market performance.

Therefore, Studio Line is facing an important challenge, which this dissertation aims to answer. Given the negative performance of the market and the low penetration observed in this category, Studio Line is faced with several important questions, in order to solve this challenge. What are the Portuguese male consumer's Hair Care habits? What barriers do these consumers face to consume Hair Styling products? What drives them to consider purchasing Hair Styling products? Could Studio Line, being the leader of the market, increase the Hair Styling penetration on male consumers in Portugal? What strategy should Studio Line adopt? Should Studio Line stay and fight this market or should the brand call it a day and leave the Portuguese market?

In order to answer these questions, a market research was conducted through in-depth interviews, focus groups and an online survey. The results are presented in following section.

IV. Market Research

Aim and Scope of the Research

This research was conducted through two Focus Groups **(Exhibit 5.1)** and an Online Survey. The aim of this analysis was to retrieve information on the Portuguese male consumer's habits, behaviours, opinions and perceptions regarding this product category. Subsequently, this useful information could assist Studio Line in making a decision on whether it should draw a marketing strategy to increase penetration in the market or if it should abandon it.

The first focus group comprised young consumers: males, with ages between 18 and 27 years old. There were seven participants, all of them students, but from different social statuses, backgrounds and lifestyles, thus creating a relatively heterogeneous sample. The second focus group had six participants, all professionals, which were from an older generation, from 28 to 35 years old. It was also a heterogeneous sample, comprising consumers with different lifestyles and preferences.

Both focus groups were recorded with the participants' consent and lasted around one hour, designed to allow as much interaction and discussion among participants as possible.

The online survey was distributed in social media networks for younger men and through email for older segments, in order to reach the most diversified segments. The survey was available only to male consumers, but from different backgrounds and lifestyles, in order to build a heterogeneous sample. In this way, it could be assessed the differences between consumer segments and all the possible perceptions and barriers Portuguese male consumers face in this category. The survey collected 171 valid responses, allowing for a detailed that drew relevant conclusions. The data was analysed through IBM SPSS Software, in order to draw more in-depth conclusions.

Research Findings

In order to make a clearer analysis, the results of both focus groups and online survey were split into the following topics: Consumer Habits, Determinant Attributes, Product Category

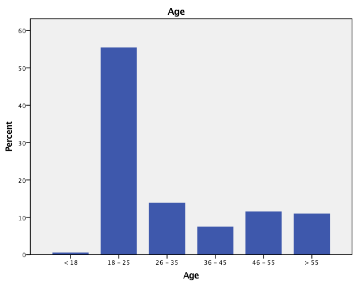
Embarrassment, Brand Perceptions and Brand Relationship.

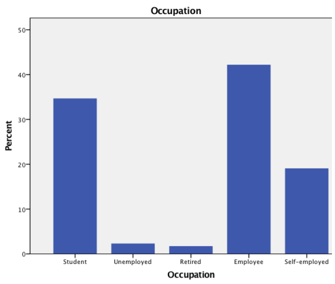
Demographics

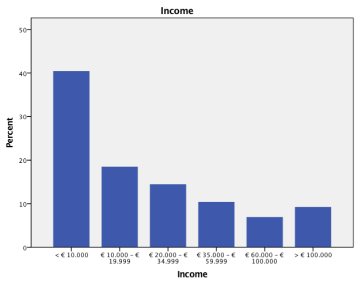
The sample in the survey was mostly from a young age (<25 years old), which represented 56.1%. However, 19.1% were 46 years old or over, which allowed for a sample that included all age groups.

Regarding occupation, 61.3% of the samples was either an employee or self-employed and 34.7% were students. As for annual disposable income, the other variables are reflected as 59% earned less than € 19,999 per year, meaning that either are students or young employees. However, 16.1% of the respondents had an annual disposable income above € 60,000.

Therefore, it can be observed that the sample was quite heterogeneous in all variables, representing fairly the population.







Consumer Habits

In the Focus Groups, on a first approach, the participants were asked about their consumption habits on Hygiene. In the first focus group, all participants used, on a daily basis, shampoo, deodorant and perfume. As for the products this study aims to address, hair gel and hair wax, only two participants used it on a regular basis, but all of them had used it at least once. However, one of the regular users said that he doesn't like to use it so often because his "*hair gets very damaged, too thin and harder to wash and brush*". The reasons behind experimenting Hair Styling products were curiosity or because someone in their family used it. However, the ones that do not use it on a regular basis say it's because they don't feel the need or because they lack knowledge on the differences and benefits of these products. The two participants that use Hair Styling products prefer hair wax due to its more natural and matte finishing. They use it so that they feel more confident and pretty and also to solve hair issues.

The purchasing of these products is mostly done at the supermarket, as the participants feel it is more convenient and perceive it as having fewer offers than specialty stores. They prefer less offers in order not to get confused and being able to differentiate between products and brands.

The second focus group had slightly different results. All participants used on a daily basis shampoo, deodorant, perfume and skin moisturizer. As for hair styling products, only one of them used it regularly, whereas other participants had tried it once or twice. Most participants felt that this kind of products damaged the hair and gave it a dirty look. The participant that used it on a regular basis used it in all occasions to control his hair. He usually buys it at a specialty store, spending 25€ on a hair wax. The remaining participants stated that the hair gel or hair wax that they had already used was for a special occasion and they purchased these products in the supermarket, for being cheaper and because they recognized the brands.

the results of both focus groups, some questions and hypothesis were designed for the survey, in order to evaluate this measure more effectively. Descriptive analysis revealed that the most used Hair Care product on the respondents' daily routine is shampoo (98.8%), followed by conditioner (15%). [Table 7.1]

Regarding Hair Gel and Hair Wax, 9.2% and 10.4%, respectively, of the respondents used it regularly. [Table 7.1] In terms of frequency of these products, most of the respondents stated never having used either Hair Gel or Hair Wax (40.5%). However, 36.4% have tried it at least once in their lifetime, in which 50% use it everyday and 25% less than once a month. [Table 7.2] In terms of occasions of usage, the most popular situation is "Special occasions" (11%), followed by "Daily life" (10.4%) and "Out at night" (6.4%). [Table 7.3]

The first hypothesis to be tested was: H_1: Consumers use more Hair Styling products depending on the occasion. To do so, Crosstabulation analysis was performed. Through this test the null hypothesis is rejected for the occasions "Daily life" and "Special occasion", with $p=0.002$ and $p=0.037$, respectively. [Table 7.4]

Determinant Attributes

At this stage, the aim was to understand why or why not consumers use these products, in order to determine the barriers and values attributed to the product category. The participants who use hair styling products were asked what they value the most on this product category, in which the younger group mentioned attributes such as the final look, price, invisibility/matte look, easy utilization and the smell, whereas the professionals' group also mentioned texture. *"We are not hairdressers, thus if applying a hair gel or wax takes us more than 5 minutes, we'll quit",* stated one of the participants.

The non-consumers of this product category were then asked the reason why they do not use hair styling products. Both groups mentioned the same reasons: hair damaging, dirty appearance and not feeling the need.

Given the results of both focus groups, some questions and hypothesis were designed for the survey, in order to evaluate this measure more effectively. In order to understand what are the respondents' perceptions on Hair Styling products, several statements were presented for them to state their agreement level. Therefore, it was found that the most agreeable statements were "These Products give an unnatural look" (62.4%, X=2.95), "Hair Gel/Wax is not for people like me" (53.3%, X=2.75) and "These products damage the hair" (42.2%, X=2.60). The least agreeable statements were "These products give me status" (10.4%, X=1.43), "I feel embarrassed in talking with my friends about Hair gel / wax" (18.3%, X=1.70) and "I don't like to say I use Hair Gel/Wax" (17.9%, X=1.75). [Table 7.5] Therefore, it can be concluded that the Portuguese consumers perceive these products as unhealthy for the hair and do not identify with them, as they see no benefit. However, those who use it do not feel embarrassment in talking about it with other peers.

In order to assess the differences on the valuation of the attributes depending on the consumers the following hypothesis was developed: H_2: Regular consumers value different attributes than "one-time" consumers. In order to test it, a One-way ANOVA was conducted. Through the test, it could be stated that for some attributes respondents have different valuations, rejecting the null hypothesis, like Easiness of Application (p=0.021), Brand (p=0.011), Invisibility (p=0.004) and Final Look (p=0.036). Observing the means for these attributes, it can then be found that whereas Easiness of Application, Invisibility and Final Look are extremely valued by regular Hair Styling users (X=74.2, X=83.5, X=83.9, respectively), Brand is not considered to be of much importance (X=46.2). As for "one-time" users, these attributes are valued in a similar proportion, but much less than regular users (X=59, X=63.1, X=69.4, X=30.8, respectively). In terms of descriptive analysis, it can be stated that the most valued attributes in general are Final Look (X=75), Invisibility (X=71), Easiness of Application (X=64.9) and Fixation (X=57) [Table 7.6].

In order to assess if demographics have an effect on the importance each attribute has for each consumer a sixth hypothesis was designed: H_3: Attribute importance level varies across consumers' with different demographics. Thus, a N-way ANOVA test was performed for each of the attributes.

Through this analysis, one can state that demographics influence the valuation of some attributes by the consumers, rejecting the null hypothesis. The attributes that suffer a valuation dependent on demographics are easiness of application, final look and price. Regarding easiness of application, the interaction between age and occupation has an influence on the valuation of this attribute (p=0.049) [Table 7.10.2], in which self-employed consumers with ages between 26 and 35 years old are the ones who value it the most (X=91), followed by self-employed with ages between 46 and 55 years old (X=86.7). The ones that value it the least are students with ages between 26 and 35 years old (X=33), followed by self-employed men with ages higher than 55 years old.

Regarding final look, the interaction between age and occupation has an influence on the valuation of this attribute (p=0.036), in which self-employed men with ages between 26 and 35 years old are the ones that value it the most (X=100), followed by employees from the same age (X=88.6). The ones that value it the least are self-employed men with ages between 36 and 45 years old. [Tables 7.7]

Lastly, regarding price, age and the interaction between age and occupation affect the valuation consumers give to this attribute (p=0.038 and p=0.008, respectively), in which men between 18 and 25 years old are considered to be the most price sensitive (X=54). However, in terms of interaction with occupation, the most price sensitive men are between that age segment and employees (X=66.4), followed by unemployed men with ages higher than 55 years old (X=61.6). The least price sensitive consumers are men self-employed with ages between 36 and 45 years old (X=25), followed by employees with ages between 46 and 45 years old (X=28.2). [Table 7.7.3]

As to understand if demographics would also influence the perceptions consumers have on Hair Styling, the following hypothesis was developed: H_4: Demographics influence perceptions consumers have on Hair Styling. Thus, a One-way ANOVA test was performed. Through this analysis, it can be stated that age has an effect in some perceptions, rejecting the null hypothesis. This variable affects the perception on whether these products leave the hair with a dirty look (p=0.002). Overall, respondents' tend to think that hair styling products do not leave the hair with a dirty look (X=2.38), especially younger consumers with ages below 18 years old (X=1.00). However, consumers with ages between 26 and 35 years old and between 46 and 55 years old tend to think the opposite (X= 2.68 and X=2.62, respectively). [Table 7.8]

Product Category Embarrassment

When it comes to purchase embarrassment, younger participants state that they have no problem on talking to friends and family about hair styling products and ask for recommendations. However, they feel more embarrassed at the point-of-sale, being a bit inhibited to ask a sales person for recommendations. The professionals group, on the other hand, state that they would never talk about these products with their acquaintances, perceiving it as extremely embarrassing. *"Guys do not talk about that stuff, it is extremely gay and I would be made fun of",* stated the participants in the Focus Group. Yet, at the point-of-sale they would have no problem in asking information or recommendations to a sales person.

During their decision-making process at the point-of-sale, the first group finds it hard and confusing to differentiate and identify the benefits of each single product, stating that *"it's a process that it takes a while",* whereas the second group finds it a bit confusing, but do not find it hard to make a decision.

Given the results of both focus groups, analyses were made to the responses of the online survey, so as to take more clear conclusions. Through it, one can observe that the respondents do not feel embarrassed in talking about these products with their friends (64.7%), neither in the purchasing process (69.9%) and neither feel embarrassed in admitting they use it (54.4%). [Tables 7.9]

Brand Perceptions

At this point of the focus groups, the participants were exposed to logos from different hair styling brands (being these manipulated, not showing the entire logo) for them to identify **(Exhibit 5.2)**. In the first group, four participants recognized Studio Line's and easily identified the ones from Axe and Pantene. In the second group, only the logos from Studio Line and Pantene were identified, in which half the participants recognized Studio Line and all of them Pantene.

Then, the participants were exposed to an ad from each of the brands (Studio Line, Axe and Syoss) **(Exhibit 5.2)**. Regarding the ad from Studio Line, the first group perceived it as young and *"UK style*", meaning that it looked for British men, whereas the second group felt it was for teenagers. As for Axe's ad, the first group related it to younger consumers, perhaps targeting their first usage. They also perceived it as being pornographic and teasing. The second group extremely disliked Axe's ad, stating it was cheap and that it was for *"the older man who thinks he's young".* Syoss's ad was the most preferred in the first group, perceiving it as for young adults and classic, whereas the second group found it sexy and teasing, but also cheesy.

At this moment, the brand being studied was revealed and the participants were presented with three TV ads from Studio Line **(Exhibit 5.2)**. Their opinions and perceptions on the brand's core values were asked. The first group thought all ads were extremely weak and that it symbolized nightlife. *"Portuguese men do not relate to these type of communication, they are robust and conservative".* Regarding the first ad presented, which was for the Indestructible hair gel, participants thought it was too fast action and did not relate to it. As for the second one, Matt & Messy, it was perceived as the most intense of the three, due to the colours of the ad and the relationship between the man and the woman. The last ad, TXT, was perceived as very distant. *"The idea behind it is great, but the communication sounds as a radio ad".* However, they liked the black & white colours and the blocks, stating it looked for models. A suggestion was also given by the participants, in line with their needs, *"They need to show business men with business hairstyles. If I wore my hair like this to work, I would be fired".*

The second group also thought all ads were terrible, perceiving the TXT one as the worst, stating it was poorly managed. Regarding the one from Indestructible, the participants perceived it as cheesy, whereas the Matt & Messy one was perceived of higher quality.

Given the results of both focus groups, some analyses were made to the responses of the online survey, in order to get more insightful information. Thus, so as to understand the consumers' perceptions on Studio Line, descriptive analysis was performed. According to the analysis, it can be stated that Studio Line is perceived as a young brand (X=68.1), modern (X=55) and a bit Metrosexual (X=50.7). It is also seen as not being rational (X=33.5) and not business like (X=20.1), lacking some irreverence (X=40.7) and tease (X=38.2). [Table 7.10]

Brand Relationship

Regarding their relationship with Studio Line, in the first group 5 participants knew the brand and had already use it, whereas in the second all of them knew it but none of them used it. The first group perceives the brand for being for a *"kid who goes to a club to hit on girls"* or irreverent and fashionable men. In comparison to other brands, they state that Studio Line is more clean and sophisticated, but that it lacks presentation. They trust Studio Line, due to the L'Oréal's stamp, which transmits credibility. Regarding the brand's personality, the participants associate it with aggressive animals, like panthers and cheetahs, punk music and winter.

The second group perceived the brand for being for teenagers and tacky people, reminding them of "Jersey Shore"[1]. For them, Studio Line is a brand that transmits youth, irreverence, differentiation and wildness. As for the brand's personality, the participants associate it with a tiger, techno music and also with The Backstreet Boys.

[1] Jersey Shore is an American reality television series that ran on MTV. The series follows the lives of eight housemates spending their summer at the Jersey Shore in New Jersey.

V. CONCLUSION

Closing Remarks and Recommendations

Portuguese male consumers' habits regarding Hair Care are still very traditional, where the only product used by almost the entire segment is shampoo, on a daily basis. However, the market is evolving and some of them already use conditioner and hair treatments. When it comes to Hair Styling, only few of them use it regularly, as most of them haven't even tried. Those who use it regularly or once in a while, use it mostly to go to work or for a special occasion.

The reasoning behind suppress on Portuguese male consumers' minds regarding Hair Styling products is mostly due to the culture and style prevailed in Portugal, in which a natural, soft and clean look is most valued. Moreover, Portuguese men perceive Hair gel as an expensive and dispensable product that damages the hair and gives them a dirty look. As they perceive these products to leave a too elaborate and unnatural hairstyle, they state that they do not feel the need to use them. However, throughout this research, it was found that most of these perceptions come from a lack of knowledge on the product category. Portuguese men are not able to differentiate between different hair gels or hair waxes and feel embarrassed to ask a friend or sales person for information and recommendations.

Therefore, in order to increase the penetration in this segment, some measures have to be implemented and adapted to the Portuguese market. Given that the most valued attributes in a Hair Styling product are texture, easiness of application, brand invisibility and final look, Hair wax becomes the most suitable solution. In fact, brands that currently offer more waxes than gels are the ones losing less market share. Thus this shift from hair gel to hair wax has to be taken into account when defining a portfolio, in order to make Portuguese men feel more confident when using this product category. Moreover, this communication has to be adapted to more business-like settings, as men find a big barrier to be that the looks presented these brands are too casual, juvenile and unnatural.

In terms of pricing, Portuguese male consumers' purchasing decisions revolve around discounts and promotions, which is not very common in this category, presenting one of the lowest promotion levels in the market. As for communication, since men tend to look for more specific information than women in their decision-making process, more simplified store and POS information should be available for this target. Moreover, by implementing more creative communication through advertising, promotion and packaging, familiarity with the product category increases, potentially diminishing embarrassment levels.

Therefore, as market leader, in order to increase penetration in this market and consequentially its share, Studio Line should adopt a more straightforward communication and redefine its product portfolio. Its strategy should be split into two branches: loyal consumers and new consumers. As men demonstrate higher levels of loyalty towards companies, reinforcement on current consumers should be made through the innovation of new textures and by increasing promotion levels. As for recruiting new consumers, Studio Line should redefine its product portfolio into 60% hair waxes and 40% hair gels, maintaining both types of consumers and becoming more appealing to new ones. In terms of communication, Studio Line should follow L'Oréal's CEO goal, to be "universal, digital and sustainable". To do so, it needs to be present in all sorts of platforms, not only on blogs and social media networks, where marketing is mostly done, but also on sports channels and newspapers, where our target is mostly found. These consumers don't perceive any differentiation inside the product category and have little knowledge about it. Therefore, Studio Line should have simple and straightforward information and explanation of the promises and benefits of the products at the point of sale. Lastly, its brand personality should be reinforced – the brand has not invested in communication for the past 3 years -, highlighting its young, modern, irreverent and emotional personality.

Limitations and Suggestions for Future Research

Although this research was able to gather information heterogeneous of the population, being highly representative, some limitations were associated.

Given that it was found that most respondents do not have sufficient knowledge on the category being studied, Hair Styling, their answers to "Agree/Disagree" question formats became biased.

Therefore, for future research, two different researches must be made, one for consumers who know the product category and another for the ones who don’t. It would also be beneficial to analyse other well-established companies’ strategies in similar challenges, as there is a lack of practical case studies and scientific articles on this matter.

VI. TEACHING NOTE

Synopsis

This case study addresses common subjects in marketing, such as positioning, consumer behaviour and brand personality, while analysing a challenge Studio Line faces in the Portuguese market.

Studio Line is a brand from the group L'Oréal, which sells Hair Styling products for men, such as hair gels and hair waxes. Established in the 1980's, it started as a Hair Styling toolbox that allowed its consumers to be the creators of their hairstyles. The art of designing and sculpting one's hair became an everyday ritual all over the world, which at the time was extremely revolutionary. The TV commercials presented a very breakthrough brand in terms of communication, in a more punk style, which consumers were not used to. Even the hairstyles presented were completely different from what people were used to wear.

However, the Hair Styling market in Portugal is facing a negative growth trend, decreasing year after year, and reaching a penetration rate that is half of the European average. As Portuguese consumers are quite traditional, valuing soft, natural and clean looks when it comes to beauty and fashion, the irreverent and punk hairstyles brands in this category present no longer fulfil these consumers' needs. Therefore, being the market leader, Studio Line becomes responsible for increasing the market's penetration in a sustainable way, in order to maintain its position. A deep understanding of male consumers' needs and perceptions must be addressed and the most suitable strategy to implement must be found.

Target Audience & Teaching Objectives

This case study is appropriate for both undergraduate and master students taking Marketing or Strategy courses. It should be applied focusing on two main components: a theoretical one, assessing students' knowledge on some important marketing concepts, such as positioning, consumer behaviour and marketing mix; and a practical component, in which students are asked to apply these concepts to an existing company's specific challenge.

Throughout chapters two to four, students will be able to understand how some marketing concepts apply in real life situations. By incorporating the role of a Studio Line's Product Manager in Portugal, with all the information provided along this dissertation, students will have the opportunity to design the most suitable strategy for Studio Line given the present Portuguese market.

Teaching Plan

In order to maximize the learning process and build a more insightful and rich in-class discussion, this teaching plan is split into two parts:

1. **Individual:** Students should take home this case study and be asked to read it, highlight the most relevant information and answer the following questions:

A. What is Studio Line and how would you characterize the brand in the current Portuguese market?
Students should look for answers in pages 29 to 32.

B. What are the main barriers Portuguese male consumers' face towards hair styling products? What does this mean for Studio Line?
Students should look for answers in pages 27 to 29 and also 41 to 46.

C. How does Brand Personality influence purchasing behaviour? In what way should Studio Line adapt its personality?
Students should look for answers in the Literature Review pages 11 to 13 and also in the Case study pages 44 to 46.

D. Should Studio Line reposition itself in the market or should it simply leave the Portuguese market?
It is asked the students personal opinions based on the entire case study and results of the market research.

2. **In groups:** In the following class, students should be split into four groups, one for each question, and discuss as a group their individual answers to the questions. It should be given 20 minutes for discussion. Then, each group should make a 10

minutes presentation on the question attributed and the remaining students should comment and discuss each presentation. In the end, the professor should do a summary of each question on the board, highlighting the most relevant insights.

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VIII. EXHIBITS

Exhibit 1 – Distribution of the segments in the market

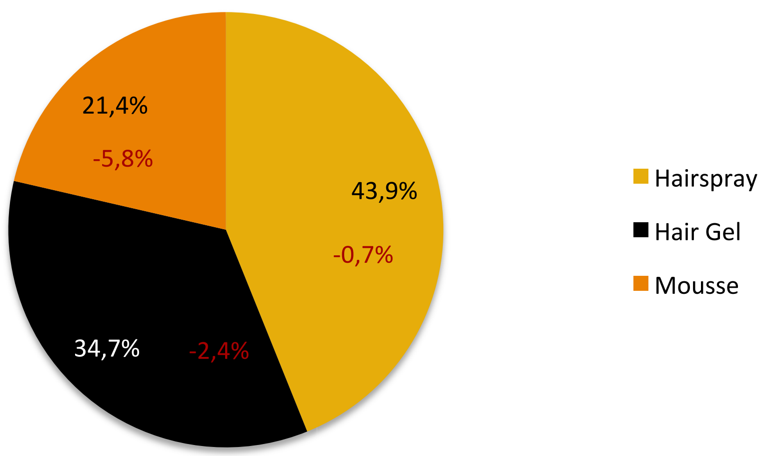


Exhibit 2 – Hair Gel and Hair Wax Evolution 2015

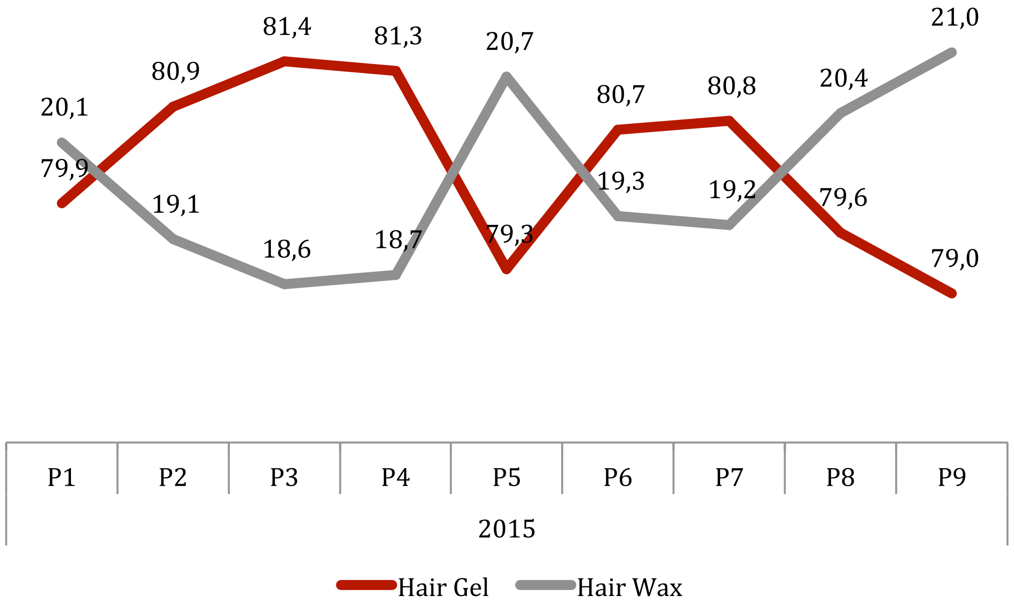


Exhibit 3 – Studio Line’s Portfolio

Indestructible

TXT

Special FX

Mineral FX

Exhibit 4 – Interview Guideline to L’Oréal Paris Hair Care & Styling Brand Manager

L’Oréal Group:

1. How was the launch of the group and its evolution throughout the years?
2. In which year was the group introduced in the Portuguese market?
3. Mission, values and mission of L’Oréal Group.

L’Oréal Paris:

1. How was the launch of L’Oréal Paris and its evolution throughout the years?
2. In which year was L’Oréal Paris introduced in the Portuguese market?
3. Mission, values and mission of L’Oréal Paris.
4. Explain the current positioning and strategy of the brand.
5. How is the brand internally structures? (Responsibilities, divisions, sectors)

Studio Line:

6. How was Studio Line launched and its evolution throughout the years??
7. What is the penetration rate of this product category in other European countries?
8. Comparing to other European countries, Portugal has a low penetration rate in Hair Styling. In your opinion, what are the main reasons?
9. In which year was this brand introduced in the Portuguese market? How was this process?
10. Explain the brand's current positioning.
11. What is the current strategy of the brand?
12. Which were the biggest limitations found in this market until now? And the most important marks?
13. What's the penetration rate of Hair Styling in the Portuguese male consumer?
14. What is the purchase frequency of Hair Styling in the Portuguese Male consumer?
15. Describe the typical Studio Line consumer. What do these consumers value the most in the brand?
16. In you opinion, how should Studio Line communicate with this target?
17. What are the main consumption drivers for this product category?
18. In your opinion, what are the main barriers consumers face regarding this product category?
19. How could Studio Line increase the penetration rate of this category in the Portuguese market?
20. In your opinion, which are the key success factors in the Portuguese male market for Hair Styling?

Data asked:

1. Sales in value and volume for each category segment of Studio Line, main competitors and the market.
2. % Promo

Exhibit 5 – Focus Group

Exhibit 5.1 – Focus Group Guideline

FOCUS GROUP GUIDELINES:		
Part	**Action**	**Time**
Introduction and Warm-up	**Present myself and the research purpose: Evaluate the responsiveness of the Portuguese male consumers to Hair Styling** **Ask the partipants to present themselves** **The main goals of the Focus Group:** 1. Understand the opinions and perceptions about a product category and, in a later stage, about a specific brand 2. Gather valuable information for the development of my thesis project about the category and the brand **Participation Rules** 1. It is wanted as much discussion and opinion-sharing as possible 2. Feel free to say whatever comes to mind, but respect others while they speak 3. At a given point, I will ask you to write answers down instead of voicing them, in order not to influence other people	**5 min**
Consumer Habits regarding Product Category	**GOAL: What are the Portuguese male consumer's habits regarding hair care?** **Daily Usage/Hygiene Habits** Today we will talk about personal care products for men. 1. What kind of products do you use? 2. What is your beauty daily routine? 3. Do you use Hair Care products? If yes, which ones? 4. How frequently do you use each one of them? 5. Regarding Hair Styling, have you ever used Hair Gel or Hair Wax? Why or Why not? 6. In what occasions do you use this kind of products? 7. Do you buy the products for yourself or someone does it for you? 8. Where do you usually buy these products? (supermarket, hairsalon, etc) Why? 9. How much would you be willing to pay for this kind of product?	**10 min**
Brand Recall & Brand Awareness	**GOAL: Understand which brands are in their top-of-mind** 1. Using the paper: write down the first 3 brands that come to mind when you think of Hair Styling for men (ask them to show their papers and write on the board) 2. Which of these brands have you ever used for this product category?	**3 min**

Determinant Attributes	**GOAL: Understand *why/why not* consumers buy these products: Barriers and Value** 1. What makes you buy these specific products from these specific brands? 2. What do you value the most in a hair gel/wax? 3. For those who do not use this product category, what do you dislike about it? 4. What would make you start using it?	**7 min**
Product Category Embarassment	1. Have you ever spoken to your friends/family about this product category? (get their opinion, recommendations, etc). Why? 2. In the location where you usually do your beauty/hair care shopping, have you ever spoken to a salesmen/lady to get recommendations on this kind of product? 3. Do you find it easy to identify and differentiate the benefits of each product during your decision making process?	**3 min**
Show Posters of Several Brands (STUDIO LINE, AXE, PANTENE, SYOSS)	**GOAL: Test consumers visual associations with the brands** 1. Can you identify the brands of these ads? (Make them write answers down, corresponding ad number to each brand. See % of consumers who can and can't) 2. What kind of feelings do these posters give you? What message do you think they try to convey? What is your opinion on these ads? *Reveal the brand I'm studying: Studio Line*	**5 min**
Associations	**Products associated with Studio Line** 1. How well do you know Studio Line? Can you name Studio Line's specific products? 2. Words/ Symbols/ Memories they associate with Studio Line	**5 min**
Show TV Commercials (2/3 depending on time)	**Open Discussion: What is the message of this video?** 1. Do you like this line of advertising? 2. What can you say about the product from this commercial? 3. What do you think are Studio Line's core values, judging from this ad?	**5 min**

Relationship with brand	1. Did you know the brand before? 2. Have you ever/do you regularly use their products? Why or why not? 3. Like/Dislike 4. Opinions 5. Features/Packing/Design/Style 6. Performance? Trustworthy? 7. Price perception: how much do you think a Studio Line Hair gel cost? What about Hair Wax?	**10 min**
Brand Personification	1. Physical traits/Personality/lifestyle/feelings 2. What would Studio Line be if it were... An animal? A music type? A season of the year? A food? What would it be like if it were a person?	**5 min**
POP with competition (TBD)	1. What makes Studio Line better than the competition? Worse? 2. What do you see in your Hair Styling products that Studio Line doesn't offer?	**3 min**

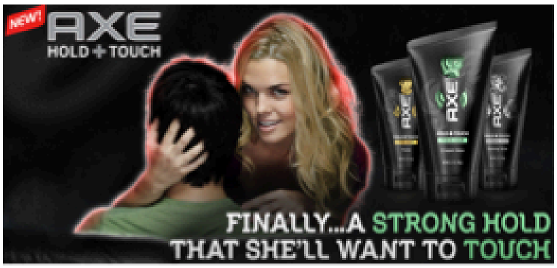
Exhibit 5.2 – Focus Group Presentation

1.

2.

3.

4.



Studio Line – Indestructible Gel

https://www.youtube.com/watch?v=kXwLoy1Svx8

Studio Line – Matt & Messy

https://www.youtube.com/watch?v=pRGRBHCIfmY

Studio Line – TXT

https://www.youtube.com/watch?v=8YuJ4QfS1EA

Exhibit 6 – Online Survey Template

Olá! Antes de mais, muito obrigada pelo tempo que irá despender a responder a este questionário. O meu nome é Margarida Vieira de Sá e encontro-me neste momento a terminar o meu mestrado em Business Administration na Católica-Lisbon. Desta forma, necessitaria da sua contribuição para realizar este questionário, para o uso do mesmo na realização da minha tese. Este estudo tem como objectivo identificar as opiniões e percepções dos consumidores masculinos portugueses, tendo em conta os seus hábitos de consumo e processo de decisão de compra relativamente a produtos capilares. Posto isto, este questionário é apenas dirigido a consumidores do sexo masculino.O questionário irá demorar em média 5 minutos e as suas respostas serão anónimas. Não existem respostas certas ou erradas. Muito obrigada pela sua colaboração!

❍ Homem (1)

Na sua rotina diária, quais dos seguintes produtos utiliza regularmente no cabelo?

❑ Shampoo (1)
❑ Amaciador (2)
❑ Gel (3)
❑ Cera (4)
❑ Máscara (5)
❑ Ampolas (6)
❑ Tratamentos específicos (7)
❑ Sérum (8)

Usa ou já alguma vez usou gel ou cera para o cabelo?

❍ Sim (1)
❍ Sim, já experimentei (2)
❍ Não (3)

If Sim Is Not Selected, Then Skip To Indique o seu nível de concordância c...

Com que frequência utiliza este tipo de produtos?

❍ Todos os dias (1)
❍ 1-3 vezes por semana (2)
❍ De duas em duas semanas (3)
❍ 1 vez por mês (4)
❍ Menos do que 1 vez por mês (5)

Em que ocasiões costuma utilizar gel ou cera para o cabelo?

- ❑ Sair à noite (1)
- ❑ Trabalho (2)
- ❑ Faculdade (3)
- ❑ Reunião importante (4)
- ❑ Jantar com amigos (5)
- ❑ Dia-a-dia normal (6)
- ❑ Ocasião especial (7)

Indique o seu nível de concordância com as seguintes afirmações.

	Discordo Totalmente (1)	Discordo Parcialmente (2)	Concordo Parcialmente (3)	Concordo Totalmente (4)	Não sei / Não respondo (5)
É fundamental cuidar do meu cabelo (1)	❍	❍	❍	❍	❍
O cabelo está ligado à beleza de uma pessoa (2)	❍	❍	❍	❍	❍
Preocupo-me com a aparência do meu cabelo (3)	❍	❍	❍	❍	❍
A utilização de uma boa cera ou gel é fundamental para a aparência do cabelo (4)	❍	❍	❍	❍	❍

Answer If Usa ou já alguma vez usou gel ou cera para o cabelo? Não Is Not Selected

Indique o nível de importância que tem para si cada atributo na escolha de um gel ou cera para o cabelo.

______ Fixação (1)

______ Brilho (2)

______ Fácil de aplicar (3)

______ Marca (4)

______ Invisibilidade (5)

______ Efeito final (6)

______ Preço (7)

Indique para as seguintes frases o seu grau de concordância

	Discordo Totalmente (1)	Discordo Parcialmente (2)	Concordo Parcialmente (3)	Concordo Totalmente (4)	Não sei / Não respondo (5)
Gel / Cera não é para pessoas como eu (1)	❍	❍	❍	❍	❍
O corredor dos produtos para cabelo masculino no hipermercado é confuso (2)	❍	❍	❍	❍	❍
Consigo diferenciar um gel / cera de outro gel / cera (3)	❍	❍	❍	❍	❍
Sinto-me inibido em comprar gel / cera para o cabelo (4)	❍	❍	❍	❍	❍
Sinto-me inibido em falar com os meus amigos sobre gel / cera para o cabelo (5)	❍	❍	❍	❍	❍
Não percebo qual a necessidade de usar	❍	❍	❍	❍	❍

um gel / cera para o cabelo (6)					
Estes produtos deixam o cabelo com um aspecto sujo (7)	❍	❍	❍	❍	❍
Estes produtos estragam o cabelo (8)	❍	❍	❍	❍	❍
Estes produtos dão um look pouco natural (9)	❍	❍	❍	❍	❍
Seleccione "Não sei/Não respondo" É para verificar a sua atenção. (10)	❍	❍	❍	❍	❍
Estes produtos deixam o meu cabelo mais arranjado (11)	❍	❍	❍	❍	❍
Estes produtos deixam-me confiante (12)	❍	❍	❍	❍	❍
Estes produtos dão-me status (13)	❍	❍	❍	❍	❍
Não gosto de dizer que uso gel / cera (14)	❍	❍	❍	❍	❍
Não percebo por que é que mais gente não usa gel / cera (15)	❍	❍	❍	❍	❍

Até quanto estaria disposto a pagar por um:

______ Gel (de 150ml) (1)

______ Cera (de 75ml) (2)

Quais das seguintes marcas de gel/cera para o cabelo conhece?

- ❑ Axe (1)
- ❑ Studio Line L'Oréal Paris (2)
- ❑ Nivea (3)
- ❑ Syoss (4)
- ❑ Pantene (5)
- ❑ Shockwaves (6)
- ❑ Corine de Farme (7)
- ❑ Mylabel (8)
- ❑ Fructis Style Garnier (9)
- ❑ Nenhuma (10)

Answer If Usa ou já alguma vez usou gel ou cera para o cabelo? Não Is Not Selected

Atribua as seguintes frases às marcas a que mais se adequam na sua opinião.

Studio Line L'Oréal Paris	AXE	Fructis Style	Nenhuma
______ Esta marca é a melhor do mercado (1)	______ Esta marca é a melhor do mercado (1)	______ Esta marca é a melhor do mercado (1)	______ Esta marca é a melhor do mercado (1)
______ Esta marca faz-me sentir bem (2)	______ Esta marca faz-me sentir bem (2)	______ Esta marca faz-me sentir bem (2)	______ Esta marca faz-me sentir bem (2)
______ Esta marca entende as minhas necessidades (3)	______ Esta marca entende as minhas necessidades (3)	______ Esta marca entende as minhas necessidades (3)	______ Esta marca entende as minhas necessidades (3)
______ Esta marca é de confiança (4)	______ Esta marca é de confiança (4)	______ Esta marca é de confiança (4)	______ Esta marca é de confiança (4)
______ Esta marca é irreverente (5)	______ Esta marca é irreverente (5)	______ Esta marca é irreverente (5)	______ Esta marca é irreverente (5)
______ Identifico-me com esta marca (6)	______ Identifico-me com esta marca (6)	______ Identifico-me com esta marca (6)	______ Identifico-me com esta marca (6)
______ Não conheço esta marca (7)	______ Não conheço esta marca (7)	______ Não conheço esta marca (7)	______ Não conheço esta marca (7)
______ Esta marca é confusa (8)	______ Esta marca é confusa (8)	______ Esta marca é confusa (8)	______ Esta marca é confusa (8)
______ Esta marca deixa o meu cabelo com um aspecto sujo (9)	______ Esta marca deixa o meu cabelo com um aspecto sujo (9)	______ Esta marca deixa o meu cabelo com um aspecto sujo (9)	______ Esta marca deixa o meu cabelo com um aspecto sujo (9)

______ Esta marca não entende as minhas necessidades (10)	______ Esta marca não entende as minhas necessidades (10)	______ Esta marca não entende as minhas necessidades (10)	______ Esta marca não entende as minhas necessidades (10)
______ Esta marca dá um look pouco natural ao meu cabelo (11)	______ Esta marca dá um look pouco natural ao meu cabelo (11)	______ Esta marca dá um look pouco natural ao meu cabelo (11)	______ Esta marca dá um look pouco natural ao meu cabelo (11)

Observe o seguinte anúncio de Studio Line de L'Oréal Paris antes de passar à próxima pergunta.

Após observar o anúncio, avalie os seguintes atributos em relação à marca Studio Line L'Oréal Paris, consoante a sua opinião:

______ Irreverente (1)

______ Racional (2)

______ Masculina (3)

______ De confiança (4)

______ Provocadora (5)

______ Para jovens (6)

______ Desportiva (7)

______ Moderna (8)

______ Metrosexual (9)

______ Depreciativa (10)

______ Business (11)

Sexo

❍ Masculino (1)

❍ Feminino (2)

Que idade tem?

❍ < 18 (1)

❍ 18 - 25 (2)

❍ 26 - 35 (3)

❍ 36 - 45 (4)

❍ 46 - 55 (5)

❍ > 55 (6)

Qual o seu rendimento médio anual?

❍ < € 10.000 (1)

❍ € 10.000 - € 19.999 (2)

❍ € 20.000 - € 34.999 (3)

❍ € 35.000 - € 59.999 (4)

❍ € 60.000 - € 100.000 (5)

❍ > € 100.000 (6)

Qual a sua ocupação profissional?

- ❍ Estudante (1)
- ❍ Desempregado (2)
- ❍ Reformado (3)
- ❍ Trabalhador por conta de outrem (4)
- ❍ Trabalhador por conta própria (5)

Exhibit 7 – Survey Analysis Tables

Table 7.1 – Consumer Habits

Daily Routine - Shampoo

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	171	98,8	100,0	100,0
Missing	System	2	1,2		
Total		173	100,0		

Daily Routine - Conditioner

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	26	15,0	100,0	100,0
Missing	System	147	85,0		
Total		173	100,0		

Daily Routine - Gel

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	16	9,2	100,0	100,0
Missing	System	157	90,8		
Total		173	100,0		

Daily Routine - Wax

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	18	10,4	100,0	100,0
Missing	System	155	89,6		
Total		173	100,0		

Table 7.2 – Usage of Hair Styling

Has ever used Gel or Wax

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	40	23,1	23,1	23,1
	Yes, I've tried	63	36,4	36,4	59,5
	No	70	40,5	40,5	100,0
	Total	173	100,0	100,0	

Usage Frequency Gel/Wax

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Everyday	20	11,6	50,0	50,0
	1-3 times a week	6	3,5	15,0	65,0
	Every 2 weeks	2	1,2	5,0	70,0
	Once a month	2	1,2	5,0	75,0
	Less than once a month	10	5,8	25,0	100,0
	Total	40	23,1	100,0	
Missing	System	133	76,9		
Total		173	100,0		

Table 7.3 – Occasions of Usage

Occasions - Out at night

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	11	6,4	100,0	100,0
Missing	System	162	93,6		
Total		173	100,0		

Occasions - Daily life

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	18	10,4	100,0	100,0
Missing	System	155	89,6		

Total		173	100,0		

Occasions - Special Occasion

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	19	11,0	100,0	100,0
Missing	System	154	89,0		
Total		173	100,0		

Table 7.4 - H_1: Consumers use more Hair Styling products depending on the occasion

Table 7.4.1

Crosstab

			Usage Frequency Gel/Wax					Total
			Everyday	1-3 times a week	Every 2 weeks	Once a month	Less than once a month	
Occasions - Daily life	0	Count	5	4	1	2	10	22
		% within Usage Frequency Gel/Wax	25,0%	66,7%	50,0%	100,0%	100,0%	55,0%
	1	Count	15	2	1	0	0	18
		% within Usage Frequency Gel/Wax	75,0%	33,3%	50,0%	0,0%	0,0%	45,0%
Total		Count	20	6	2	2	10	40
		% within Usage Frequency Gel/Wax	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%

Table 7.4.2

Crosstab

			Usage Frequency Gel/Wax					Total
			Everyday	1-3 times a week	Every 2 weeks	Once a month	Less than once a month	
Occasions - Special Occasion	0	Count	14	4	1	1	1	21
		% within Usage Frequency Gel/Wax	70,0%	66,7%	50,0%	50,0%	10,0%	52,5%
	1	Count	6	2	1	1	9	19
		% within Usage Frequency Gel/Wax	30,0%	33,3%	50,0%	50,0%	90,0%	47,5%

Total	Count	20	6	2	2	10	40
	% within Usage Frequency Gel/Wax	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%

Table 7.5 – Perceptions on Hair Styling

Table 7.5.1

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Agreement2 - Hair Gel / Wax is not for people like me	159	1	4	2,75	1,222
Agreement2 - The supermarket's male hair product aisle is confusing	138	1	4	2,40	,963
Agreement2 - I can differentiate a Hair gel / cera from another Hair gel / wax	145	1	4	2,18	1,217
Agreement2 - I feel embarrassed when purhcasing Hair gel / wax	151	1	4	1,57	,913
Agreement2 - I feel embarrassed in talking with my friends about Hair gel / wax	148	1	4	1,70	1,053
Agreement2 - I don't understand the need to use Hair Gel / Wax	160	1	4	2,47	1,187
Agreement2 - These products leave the hair with a dirty look	149	1	4	2,38	1,010
Agreement2 - These products damage the hair	124	1	4	2,60	,936
Agreement2 - These products give an unnatural look	152	1	4	2,95	,933
Agreement2 - These products make my hair more neat	148	1	4	2,64	1,063
Agreement2 - These products make me confident	145	1	4	1,93	,969
Agreement2 - These products give me status	154	1	4	1,43	,766
Agreement2 - I don't like to say I use Hair gel / wax	125	1	4	1,75	1,052
Agreement2 - I don't understand why doesn't more people use Hair gel / wax	136	1	4	1,78	,924
Valid N (listwise)	73				

Table 7.5.2

	Completely Disagree	Partially Disagree	Partially Agree	Completely Agree
air Gel / Wax is not for people like me	23,9%	18,2%	17,0%	40,9%
he supermarket's male hair product aisle is confusing	21,0%	31,2%	34,8%	13,0%
can differentiate a Hair Gel / Wax from another Hair Gel / Wax	44,1%	15,9%	17,9%	22,1%

feel embarassed when purchasing a Hair Gel / Wax	67,5%	12,5%	15,2%	4,6%
feel embarassed in talking with my friends about Hair Gel / Wax	64,2%	11,5%	14,2%	10,1%
hese products damage the hair	15,3%	25,8%	42,7%	16,1%
hese products give an unnatural look	8,6%	20,4%	38,8%	32,2%
hese products make my hair more neat	20,9%	17,6%	37,8%	23,6%
hese products make me confident	44,8%	22,8%	26,9%	5,5%
hese products give me status	71,4%	16,9%	9,1%	2,6%
don't like to say I use Hair Gel / Wax	60,0%	15,2%	14,4%	10,4%

Table 7.6 – H_2: Regular consumers value different attributes than "one-time" consumers.

Descriptives

		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean Lower Bound	95% Confidence Interval for Mean Upper Bound	Minimum	Maximum
Attribute Importance - Fixation	Yes	40	62,9000	25,48182	4,02903	54,7505	71,0495	3,00	100,00
	Yes, I've tried	63	53,2698	37,17014	4,68300	43,9087	62,6310	,00	100,00
	Total	103	57,0097	33,32152	3,28327	50,4974	63,5221	,00	100,00
Attribute Importance - Shine	Yes	40	22,7000	24,28062	3,83910	14,9347	30,4653	,00	89,00
	Yes, I've tried	63	24,9048	31,71990	3,99633	16,9162	32,8933	,00	100,00
	Total	103	24,0485	28,95107	2,85263	18,3904	29,7067	,00	100,00
Attribute Importance - Easy to apply	Yes	40	74,1500	22,56904	3,56848	66,9321	81,3679	10,00	100,00
	Yes, I've tried	63	58,9683	36,70632	4,62456	49,7239	68,2126	,00	100,00
	Total	103	64,8641	32,69588	3,22162	58,4740	71,2541	,00	100,00
Attribute Importance - Brand	Yes	40	46,2250	31,17074	4,92853	36,2561	56,1939	,00	100,00
	Yes, I've tried	63	30,7937	28,59289	3,60237	23,5926	37,9947	,00	91,00
	Total	103	36,7864	30,42305	2,99767	30,8405	42,7323	,00	100,00
Attribute Importance - Invisibility	Yes	40	83,5250	21,69484	3,43026	76,5867	90,4633	9,00	100,00
	Yes, I've tried	63	63,1587	40,21924	5,06715	53,0296	73,2878	,00	100,00
	Total	103	71,0680	35,53437	3,50131	64,1231	78,0128	,00	100,00
Attribute Importance - Final Look	Yes	40	83,8500	24,72469	3,90932	75,9427	91,7573	1,00	100,00
	Yes, I've tried	63	69,3651	38,19572	4,81221	59,7456	78,9845	,00	100,00
	Total	103	74,9903	34,21773	3,37157	68,3028	81,6778	,00	100,00
Attribute Importance -	Yes	40	50,4750	29,37292	4,64427	41,0811	59,8689	,00	100,00
	Yes, I've tried	63	49,8413	34,35498	4,32832	41,1891	58,4935	,00	100,00

Price	Total	103	50,0874	32,36347	3,18887	43,7623	56,4125	,00	100,00

Table 7.7 – H_3: Attribute importance level varies across consumers' with different demographics.

Table 7.7.1

Descriptive Statistics

Dependent Variable: Attribute Importance - Easy to apply

Age	Income	Occupation	Mean	Std. Deviation	N
< 18	€ 60.000 - € 100.000	Employee	50,0000	.	1
		Total	50,0000	.	1
	Total	Employee	50,0000	.	1
		Total	50,0000	.	1
18 - 25	< € 10.000	Student	58,4375	36,23929	32
		Employee	91,0000	12,72792	2
		Self-employed	64,5000	24,74874	2
		Total	60,5833	35,26016	36
	€ 10.000 - € 19.999	Student	86,6667	4,93288	3
		Employee	85,8889	17,14967	9
		Total	86,0833	14,77995	12
	€ 20.000 - € 34.999	Student	80,0000	.	1
		Employee	89,5000	15,08863	4
		Self-employed	50,0000	.	1
		Total	81,3333	19,66384	6
	€ 35.000 - € 59.999	Student	1,0000	.	1
		Employee	61,2500	35,92005	4
		Total	49,2000	41,15459	5
	Total	Student	59,7568	36,07508	37
		Employee	82,0000	22,74741	19
		Self-employed	59,6667	19,39931	3
		Total	66,9153	33,03462	59
26 - 35	< € 10.000	Student	32,0000	18,38478	2
		Employee	100,0000	.	1
		Self-employed	100,0000	.	1
		Total	66,0000	40,66940	4
	€ 10.000 - €	Employee	57,5000	23,33881	6

	19.999	Self-employed	73,0000	.	1
		Total	59,7143	22,09611	7
	€ 20.000 - € 34.999	Employee	87,6667	13,05118	3
		Total	87,6667	13,05118	3
	€ 35.000 - € 59.999	Employee	82,0000	.	1
		Self-employed	100,0000	.	1
		Total	91,0000	12,72792	2
	Total	Student	32,0000	18,38478	2
		Employee	71,8182	24,38368	11
		Self-employed	91,0000	15,58846	3
		Total	70,4375	27,09728	16
36 - 45	€ 10.000 - € 19.999	Employee	71,5000	9,19239	2
		Total	71,5000	9,19239	2
	€ 20.000 - € 34.999	Employee	82,0000	.	1
		Self-employed	70,0000	.	1
		Total	76,0000	8,48528	2
	€ 35.000 - € 59.999	Employee	95,0000	7,07107	2
		Total	95,0000	7,07107	2
	€ 60.000 - € 100.000	Employee	10,0000	.	1
		Total	10,0000	.	1
	> € 100.000	Employee	1,0000	.	1
		Self-employed	,0000	.	1
		Total	,5000	,70711	2
	Total	Employee	60,8571	39,38878	7
		Self-employed	35,0000	49,49747	2
		Total	55,1111	39,99826	9
46 - 55	€ 20.000 - € 34.999	Employee	68,0000	.	1
		Total	68,0000	.	1
	€ 35.000 - € 59.999	Self-employed	70,0000	.	1
		Total	70,0000	.	1
	> € 100.000	Employee	54,0000	47,82259	3
		Self-employed	95,0000	7,07107	2
		Total	70,4000	40,74678	5
	Total	Employee	57,5000	39,66947	4
		Self-employed	86,6667	15,27525	3
		Total	70,0000	33,28163	7
> 55	< € 10.000	Unemployed	90,0000	14,14214	2
		Total	90,0000	14,14214	2

	€ 20.000 - € 34.999	Employee	2,0000	.	1
		Self-employed	8,0000	.	1
		Total	5,0000	4,24264	2
	€ 35.000 - € 59.999	Self-employed	73,0000	.	1
		Total	73,0000	.	1
	€ 60.000 - € 100.000	Unemployed	63,0000	.	1
		Self-employed	51,0000	.	1
		Total	57,0000	8,48528	2
	> € 100.000	Student	54,0000	.	1
		Employee	69,5000	,70711	2
		Self-employed	,0000	.	1
		Total	48,2500	32,98863	4
	Total	Student	54,0000	.	1
		Unemployed	81,0000	18,52026	3
		Employee	47,0000	38,97435	3
		Self-employed	33,0000	34,82336	4
		Total	51,8182	33,77519	11
Total	< € 10.000	Student	56,8824	35,83021	34
		Unemployed	90,0000	14,14214	2
		Employee	94,0000	10,39230	3
		Self-employed	76,3333	26,95057	3
		Total	62,5000	35,05066	42
	€ 10.000 - € 19.999	Student	86,6667	4,93288	3
		Employee	74,1765	22,47008	17
		Self-employed	73,0000	.	1
		Total	75,9048	20,65649	21
	€ 20.000 - € 34.999	Student	80,0000	.	1
		Employee	77,3000	29,28803	10
		Self-employed	42,6667	31,64385	3
		Total	70,0714	31,12868	14
	€ 35.000 - € 59.999	Student	1,0000	.	1
		Employee	73,8571	30,32287	7
		Self-employed	81,0000	16,52271	3
		Total	69,1818	33,59112	11
	€ 60.000 - € 100.000	Unemployed	63,0000	.	1
		Employee	30,0000	28,28427	2
		Self-employed	51,0000	.	1

		Total	43,5000	23,10123	4
	> € 100.000	Student	54,0000	.	1
		Employee	50,3333	39,45462	6
		Self-employed	47,5000	55,00000	4
		Total	49,6364	41,10784	11
	Total	Student	58,2250	35,32595	40
		Unemployed	81,0000	18,52026	3
		Employee	71,0000	29,48497	45
		Self-employed	60,9333	34,80859	15
		Total	64,8641	32,69588	103

Table 7.7.2

Descriptive Statistics

Dependent Variable: Attribute Importance - Final Look

Age	Income	Occupation	Mean	Std. Deviation	N
< 18	€ 60.000 - € 100.000	Employee	49,0000	.	1
		Total	49,0000	.	1
	Total	Employee	49,0000	.	1
		Total	49,0000	.	1
18 - 25	< € 10.000	Student	71,1250	38,47727	32
		Employee	95,0000	7,07107	2
		Self-employed	77,0000	12,72792	2
		Total	72,7778	36,72999	36
	€ 10.000 - € 19.999	Student	79,0000	9,00000	3
		Employee	93,7778	8,19722	9
		Total	90,0833	10,40505	12
	€ 20.000 - € 34.999	Student	90,0000	.	1
		Employee	73,7500	49,22313	4
		Self-employed	100,0000	.	1
		Total	80,8333	39,80159	6
	€ 35.000 - € 59.999	Student	1,0000	.	1
		Employee	79,2500	22,26170	4
		Total	63,6000	39,95372	5
	Total	Student	70,3784	37,82147	37
		Employee	86,6316	24,52258	19
		Self-employed	84,6667	16,04161	3

		Total	76,3390	33,82797	59
26 - 35	< € 10.000	Student	77,0000	32,52691	2
		Employee	100,0000	.	1
		Self-employed	100,0000	.	1
		Total	88,5000	23,00000	4
	€ 10.000 - € 19.999	Employee	80,6667	39,61649	6
		Self-employed	100,0000	.	1
		Total	83,4286	36,89561	7
	€ 20.000 - € 34.999	Employee	97,0000	5,19615	3
		Total	97,0000	5,19615	3
	€ 35.000 - € 59.999	Employee	100,0000	.	1
		Self-employed	100,0000	.	1
		Total	100,0000	,00000	2
	Total	Student	77,0000	32,52691	2
		Employee	88,6364	29,58132	11
		Self-employed	100,0000	,00000	3
		Total	89,3125	26,40636	16
36 - 45	€ 10.000 - € 19.999	Employee	93,5000	9,19239	2
		Total	93,5000	9,19239	2
	€ 20.000 - € 34.999	Employee	84,0000	.	1
		Self-employed	70,0000	.	1
		Total	77,0000	9,89949	2
	€ 35.000 - € 59.999	Employee	94,0000	8,48528	2
		Total	94,0000	8,48528	2
	€ 60.000 - € 100.000	Employee	20,0000	.	1
		Total	20,0000	.	1
	> € 100.000	Employee	1,0000	.	1
		Self-employed	1,0000	.	1
		Total	1,0000	,00000	2
	Total	Employee	68,5714	40,52924	7
		Self-employed	35,5000	48,79037	2
		Total	61,2222	41,73960	9
46 - 55	€ 20.000 - € 34.999	Employee	44,0000	.	1
		Total	44,0000	.	1
	€ 35.000 - € 59.999	Self-employed	41,0000	.	1
		Total	41,0000	.	1
	> € 100.000	Employee	64,3333	55,82413	3
		Self-employed	94,5000	4,94975	2

		Total	76,4000	42,86374	5
	Total	Employee	59,2500	46,70029	4
		Self-employed	76,6667	31,08590	3
		Total	66,7143	38,72000	7
> 55	< € 10.000	Unemployed	90,0000	14,14214	2
		Total	90,0000	14,14214	2
	€ 20.000 - € 34.999	Employee	2,0000	.	1
		Self-employed	7,0000	.	1
		Total	4,5000	3,53553	2
	€ 35.000 - € 59.999	Self-employed	84,0000	.	1
		Total	84,0000	.	1
	€ 60.000 - € 100.000	Unemployed	68,0000	.	1
		Self-employed	69,0000	.	1
		Total	68,5000	,70711	2
	> € 100.000	Student	35,0000	.	1
		Employee	89,5000	,70711	2
		Self-employed	100,0000	.	1
		Total	78,5000	29,42221	4
	Total	Student	35,0000	.	1
		Unemployed	82,6667	16,16581	3
		Employee	60,3333	50,52062	3
		Self-employed	65,0000	40,68579	4
		Total	65,8182	35,33785	11
Total	< € 10.000	Student	71,4706	37,74655	34
		Unemployed	90,0000	14,14214	2
		Employee	96,6667	5,77350	3
		Self-employed	84,6667	16,04161	3
		Total	75,0952	35,04757	42
	€ 10.000 - € 19.999	Student	79,0000	9,00000	3
		Employee	89,1176	23,89007	17
		Self-employed	100,0000	.	1
		Total	88,1905	22,02412	21
	€ 20.000 - € 34.999	Student	90,0000	.	1
		Employee	71,6000	40,87433	10
		Self-employed	59,0000	47,46578	3
		Total	70,2143	39,54584	14
	€ 35.000 - €	Student	1,0000	.	1

	59.999	Employee	86,4286	18,54595	7
		Self-employed	75,0000	30,51229	3
		Total	75,5455	32,11344	11
	€ 60.000 - € 100.000	Unemployed	68,0000	.	1
		Employee	34,5000	20,50610	2
		Self-employed	69,0000	.	1
		Total	51,5000	22,92742	4
	> € 100.000	Student	35,0000	.	1
		Employee	62,1667	47,92251	6
		Self-employed	72,5000	47,82259	4
		Total	63,4545	44,14830	11
	Total	Student	69,8250	37,16966	40
		Unemployed	82,6667	16,16581	3
		Employee	79,2889	32,84580	45
		Self-employed	74,3333	33,24297	15
		Total	74,9903	34,21773	103

Table 7.7.3

Descriptive Statistics

Dependent Variable: Attribute Importance - Price

Age	Income	Occupation	Mean	Std. Deviation	N
< 18	€ 60.000 - € 100.000	Employee	50,0000	.	1
		Total	50,0000	.	1
	Total	Employee	50,0000	.	1
		Total	50,0000	.	1
18 - 25	< € 10.000	Student	50,4688	32,57645	32
		Employee	91,5000	12,02082	2
		Self-employed	32,5000	44,54773	2
		Total	51,7500	33,37268	36
	€ 10.000 - € 19.999	Student	40,3333	8,50490	3
		Employee	66,1111	19,16667	9
		Total	59,6667	20,40202	12
	€ 20.000 - € 34.999	Student	20,0000	.	1
		Employee	78,0000	4,00000	4
		Self-employed	100,0000	.	1
		Total	72,0000	27,12932	6

	€ 35.000 - € 59.999	Student	1,0000	.	1
		Employee	43,0000	33,11596	4
		Total	34,6000	34,28265	5
	Total	Student	47,4865	31,79677	37
		Employee	66,4211	24,04929	19
		Self-employed	55,0000	50,10988	3
		Total	53,9661	31,16528	59
26 - 35	< € 10.000	Student	48,5000	13,43503	2
		Employee	,0000	.	1
		Self-employed	,0000	.	1
		Total	24,2500	29,05598	4
	€ 10.000 - € 19.999	Employee	59,3333	29,79709	6
		Self-employed	100,0000	.	1
		Total	65,1429	31,24328	7
	€ 20.000 - € 34.999	Employee	47,6667	3,21455	3
		Total	47,6667	3,21455	3
	€ 35.000 - € 59.999	Employee	90,0000	.	1
		Self-employed	1,0000	.	1
		Total	45,5000	62,93250	2
	Total	Student	48,5000	13,43503	2
		Employee	53,5455	29,93447	11
		Self-employed	33,6667	57,44853	3
		Total	49,1875	33,34110	16
36 - 45	€ 10.000 - € 19.999	Employee	70,5000	30,40559	2
		Total	70,5000	30,40559	2
	€ 20.000 - € 34.999	Employee	90,0000	.	1
		Self-employed	50,0000	.	1
		Total	70,0000	28,28427	2
	€ 35.000 - € 59.999	Employee	4,0000	5,65685	2
		Total	4,0000	5,65685	2
	€ 60.000 - € 100.000	Employee	10,0000	.	1
		Total	10,0000	.	1
	> € 100.000	Employee	1,0000	.	1
		Self-employed	,0000	.	1
		Total	,5000	,70711	2
	Total	Employee	35,7143	41,23394	7
		Self-employed	25,0000	35,35534	2
		Total	33,3333	38,12807	9

46 - 55	€ 20.000 - € 34.999	Employee	28,0000	.	1
		Total	28,0000	.	1
	€ 35.000 - € 59.999	Self-employed	44,0000	.	1
		Total	44,0000	.	1
	> € 100.000	Employee	28,3333	25,96793	3
		Self-employed	59,5000	12,02082	2
		Total	40,8000	25,78178	5
	Total	Employee	28,2500	21,20338	4
		Self-employed	54,3333	12,34234	3
		Total	39,4286	21,67839	7
> 55	< € 10.000	Unemployed	59,0000	57,98276	2
		Total	59,0000	57,98276	2
	€ 20.000 - € 34.999	Employee	2,0000	.	1
		Self-employed	7,0000	.	1
		Total	4,5000	3,53553	2
	€ 35.000 - € 59.999	Self-employed	85,0000	.	1
		Total	85,0000	.	1
	€ 60.000 - € 100.000	Unemployed	67,0000	.	1
		Self-employed	52,0000	.	1
		Total	59,5000	10,60660	2
	> € 100.000	Student	100,0000	.	1
		Employee	65,5000	21,92031	2
		Self-employed	,0000	.	1
		Total	57,7500	43,66826	4
	Total	Student	100,0000	.	1
		Unemployed	61,6667	41,25934	3
		Employee	44,3333	39,80368	3
		Self-employed	36,0000	39,97499	4
		Total	51,0909	38,91389	11
Total	< € 10.000	Student	50,3529	31,66384	34
		Unemployed	59,0000	57,98276	2
		Employee	61,0000	53,50701	3
		Self-employed	21,6667	36,66515	3
		Total	49,4762	34,14048	42
	€ 10.000 - € 19.999	Student	40,3333	8,50490	3
		Employee	64,2353	23,12609	17
		Self-employed	100,0000	.	1

	Total	62,5238	24,11767	21
€ 20.000 - € 34.999	Student	20,0000	.	1
	Employee	57,5000	27,98114	10
	Self-employed	52,3333	46,54389	3
	Total	53,7143	31,21249	14
€ 35.000 - € 59.999	Student	1,0000	.	1
	Employee	38,5714	37,49603	7
	Self-employed	43,3333	42,00397	3
	Total	36,4545	36,59881	11
€ 60.000 - € 100.000	Unemployed	67,0000	.	1
	Employee	30,0000	28,28427	2
	Self-employed	52,0000	.	1
	Total	44,7500	24,37724	4
> € 100.000	Student	100,0000	.	1
	Employee	36,1667	31,53041	6
	Self-employed	29,7500	35,04640	4
	Total	39,6364	35,72470	11
Total	Student	48,8500	31,72926	40
	Unemployed	61,6667	41,25934	3
	Employee	53,2667	31,00176	45
	Self-employed	41,5333	37,66557	15
	Total	50,0874	32,36347	103

Table 7.8 – H_4: Demographics influence perceptions consumers have on Hair Styling

Table 7.8.1

	<18	18-25	26-35	36-45	46-55	>55
Hair Gel / Wax is not for people like me	3,0	2,9	2,5	2,6	2,5	2,6
The supermarket's male hair product aisle is confusing	.	2,4	2,3	2,2	2,7	2,5
I can differentiate a Hair Gel / Wax from another Hair Gel / Wax	4,0	2,0	2,5	2,6	2,1	2,3
I feel embarassed when purchasing a Hair Gel / Wax	1,0	1,7	1,5	1,7	1,5	1,3
I feel embarassed in talking with my friends about Hair Gel / Wax	1,0	1,8	1,7	1,8	1,4	1,5
I don't understand the need of using Hair Gel / Wax	1,0	2,5	2,5	2,5	2,9	1,8
These products leave the hair with a dirty look	1,0	2,5	2,7	2,1	2,6	1,4

These products damage the hair	.	2,7	2,9	2,2	2,7	2,0
These products give an unnatural look	3,0	3,1	3,0	2,6	3,0	2,4
These products make my hair more neat	3,0	2,6	2,9	2,8	2,4	2,6
These products make me confident	3,0	1,9	2,1	2,0	1,6	2,1
These products give me status	1,0	1,5	1,4	1,4	1,3	1,4
I don't understand why don't more people use Hair Gel / Wax	1,0	1,8	1,8	1,7	1,3	2,0
I don't like to say I use Hair Gel / Wax	.	1,7	1,8	2,0	1,9	2,0

Table 7.8.2

	< €10.000	€10.000 - €19.999	€20.000 - €34.999	€35.000 - €59.999	€60.000 - €100.000	> €100.000
Hair Gel / Wax is not for people like me	2,87	2,75	2,65	2,25	2,73	2,93
The supermarket's male hair product aisle is confusing	2,37	2,23	2,32	2,44	2,50	3,11
I can differentiate a Hair Gel / Wax from another Hair Gel / Wax	2,03	2,30	2,29	2,44	2,38	2,00
I feel embarassed when purchasing a Hair Gel / Wax	1,62	1,46	1,67	1,53	1,33	1,58
I feel embarassed in talking with my friends about Hair Gel / Wax	1,70	1,86	1,85	1,44	1,73	1,40
I don't understand the need of using Hair Gel / Wax	2,49	2,66	2,10	1,88	2,67	3,21
These products leave the hair with a dirty look	2,38	2,46	2,57	2,13	2,13	2,25
These products damage the hair	2,58	2,79	2,76	2,46	2,33	2,33
These products give an unnatural look	2,97	3,06	2,95	2,60	2,89	3,00
These products make my hair more neat	2,59	2,73	2,74	3,07	1,89	2,58
These products make me confident	1,90	2,07	2,00	1,94	1,67	1,82
These products give me status	1,52	1,43	1,25	1,40	1,40	1,38
I don't understand why don't more people use Hair Gel / Wax	1,73	1,85	1,94	1,31	1,67	2,00
I don't like to say I use Hair Gel / Wax	1,72	1,59	1,79	2,00	2,00	2,08

Table 7.9 – Product Embarrassment

Table 7.9.1

	Completely Disagree	Partially Disagree	Partially Agree	Completely Disagree	I don't know
el embarassed when purchasing a Hair Gel / Wax	59,0%	11,0%	13,3%	4,0%	12,7%
el embarassed in talking with my friends about Hair Gel / Wax	54,9%	9,8%	12,1%	8,7%	14,5%
on't like to say I use Hair Gel / Wax	43,4%	11,0%	10,4%	7,5%	27,7%

Table 7.9.2

Crosstab

	Has ever used Gel or Wax			Total
	Yes	Yes, I've tried	No	

Agreement2 - I feel embarrassed when purhcasing Hair gel / wax	Completely Disagree	Count	27	34	41	102
		% within Has ever used Gel or Wax	67,5%	54,0%	58,6%	59,0%
	Partially Disagree	Count	0	9	10	19
		% within Has ever used Gel or Wax	0,0%	14,3%	14,3%	11,0%
	Partially Agree	Count	8	10	5	23
		% within Has ever used Gel or Wax	20,0%	15,9%	7,1%	13,3%
	Completely Agree	Count	4	2	1	7
		% within Has ever used Gel or Wax	10,0%	3,2%	1,4%	4,0%
	I don't know / I don't answer	Count	1	8	13	22
		% within Has ever used Gel or Wax	2,5%	12,7%	18,6%	12,7%
Total		Count	40	63	70	173
		% within Has ever used Gel or Wax	100,0%	100,0%	100,0%	100,0%

Table 7.10 – Brand Knowledge

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Attribute Rate Studio Line - **Irreverent**	173	,00	100,00	40,6763	29,57095
Attribute Rate Studio Line - **Rational**	173	,00	100,00	33,4798	26,18307
Attribute Rate Studio Line - **Masculine**	173	,00	100,00	51,1272	31,07654
Attribute Rate Studio Line - **Trustworthy**	173	,00	100,00	49,1850	30,98350
Attribute Rate Studio Line - **Teasing**	173	,00	100,00	38,1908	29,62368
Attribute Rate Studio Line - **Youth**	173	,00	100,00	68,0578	30,33873
Attribute Rate Studio Line - **Sporty**	173	,00	100,00	45,7168	29,87932
Attribute Rate Studio Line - **Modern**	173	,00	100,00	55,4451	31,77654
Attribute Rate Studio Line - **Metrosexual**	173	,00	100,00	50,6647	35,07024
Attribute Rate Studio Line - **Depreciative**	173	,00	100,00	17,3584	22,88924
Attribute Rate Studio Line - **Business**	173	,00	100,00	20,1214	26,33333
Valid N (listwise)	173				