

Tuesday, 30 July 2019

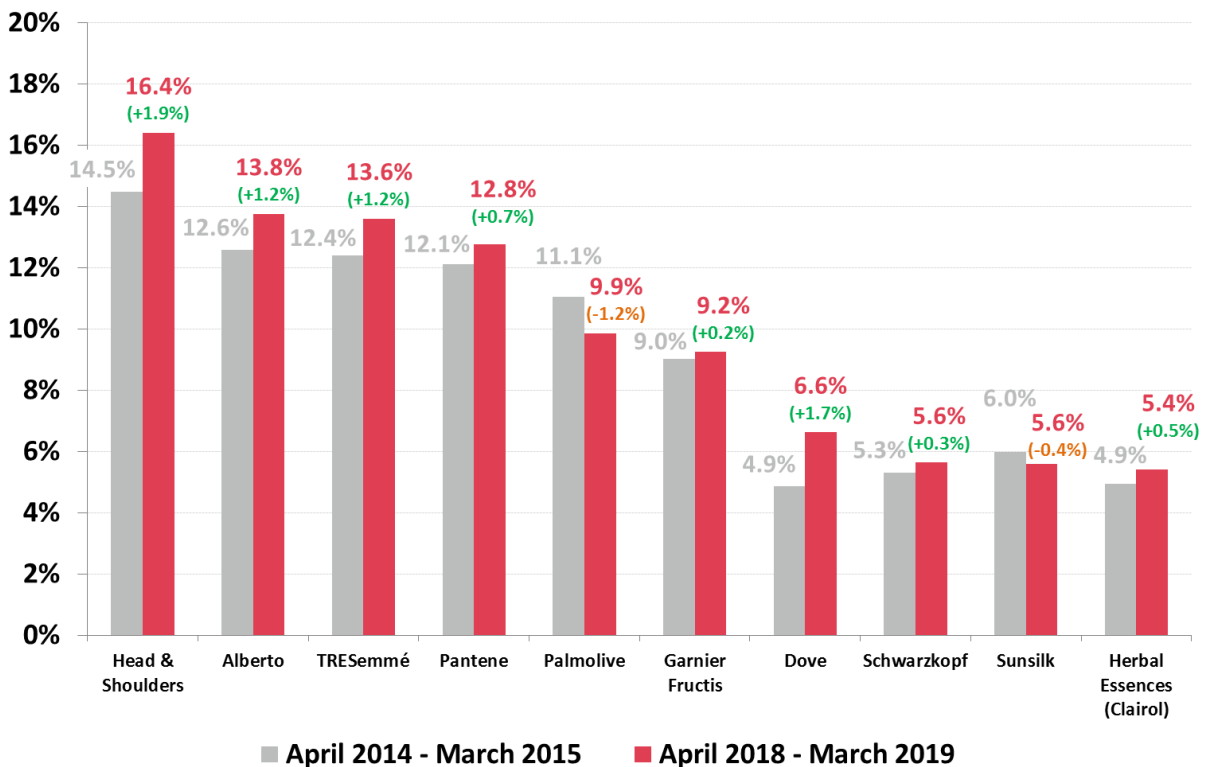
## Head & Shoulders shakes off shampoo competition

Roy Morgan's latest research into the shampoo market shows over 15.7 million Australians buy shampoo in an average six months and Australia's leading shampoo brands are Head & Shoulders, Alberto, TRESemmé, Pantene, Palmolive, Garnier Fructis, Dove and Schwarzkopf.

Head & Shoulders is clearly Australia's most widely purchased brand bought by 16.4% of shampoo buyers, up by 1.9% points from four years ago, and increasing its lead over the competition. Head & Shoulders is the leading brand for multi-national Procter & Gamble. Nearly a third of Australian shampoo buyers (32.4%) now purchase one of the several Procter & Gamble shampoo brands.

Other leading brands also enjoyed significant increases over the past four years including Alberto now bought by 13.8% of shampoo buyers (up 1.2% points since 2015), TRESemmé up 1.2% points to 13.6%, Pantene up 0.7% points to 12.8% and Dove up 1.7% points to 6.6%.

### Leading shampoo brands bought by Australian shampoo buyers – 2019 cf. 2015



**Source:** Roy Morgan Single Source (Australia), April 2014 – March 2015 (n= 10,060), April 2018 – March 2019 (n= 5,388).  
**Base:** Australian shampoo buyers aged 14+.

### Manufacturers Procter & Gamble and Unilever dominate the Australian shampoo market

Procter & Gamble is clearly the leading manufacturer of shampoo brands in Australia with nearly a third of shampoo buyers (32.4%) purchasing one of their brands such as Head & Shoulders, Pantene and Herbal Essences (Clairol) ahead of Unilever on 23.7% including brands such as Alberto, TRESemmé, Dove & Sunsilk. In third place sits L'Oreal on 13.7% including leading brands such as Garnier Fructis.

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## The man who buys Head & Shoulders has a young family but enjoys his own activities

In contrast to the average shampoo buyer, the quintessential buyer of Australia's leading shampoo brand is a Millennial man aged between 25-34 years old. Men comprise over three-fifths of all Head & Shoulders shampoo buyers.

The Head & Shoulders buyer is more likely to have only a high school education finishing up after Year 11 or 12 than the average Australian and less likely to have a diploma or degree. He is likely to be working full-time and far more likely than the average Australian to be working in a skilled or semi-skilled position with an average household income of \$110,000.

He's a family man and likely to have young children aged between 0-11 years old and in terms of the Roy Morgan Values Segments is more likely than the average Australian to be in either the [Visible Achievement](#) or [Conventional Family Life](#) – *'the core of middle Australia with values centred around significant events. They tend to be people seeking greater financial security'*.

He's far more likely than the average Australian to *'believe homosexuality is immoral'* and that *'obedience and respect for authority are the most important virtues children should learn'* and is more likely to *'choose a car mainly on its looks'*. He is more likely to agree that *'I spend more when my children come shopping with me'*, *'usually notice the advertisements on shopping trolleys when he goes grocery shopping'* and *'often enters competitions which are on packets or labels on products.'*

'Head & Shoulders man' is far more likely to be *'worried about interest rates at the moment'* than the average Australian, *'order a pizza for home delivery'*, *'play games of pool or video games at home'*, *'work on a car'* or engage in *'stamp collecting'*. He is also far more likely have been to a casino than the average Australian or watched motorcycle racing on TV.

## The woman who buys Alberto is well-educated and concerned about the environment

Alberto is the leading shampoo brand for women with over 1.35 million Australian women comprising nearly two-thirds of the brand's market.

The woman who buys Alberto is likely to be aged 35-49 years old and more likely to live in either Victoria or Queensland than population numbers would suggest. She is more likely than the average Australian to be well-educated and working in a white-collar job full-time with an average household income of \$115,000.

She is likely to be a mother with children aged 6-15 years old and likely to be in the [Socially Aware](#) Roy Morgan Values Segment – *'being information vacuum cleaners this segment is always searching for something new and different and new things to learn'*.

The 'Alberto Woman' is more likely than the average Australian to agree that *'corruption is one of the major problems facing this country'* and *'if we don't act now we'll never control our environmental problems'*. She's also more likely to agree that *'homosexual couples should be allowed to adopt children'* and *'she believes a percentage of everyone's income should go to charities'*.

She is far more likely than the average Australian to say that *'she's more interested in her job than her house'* and *'if she could afford to eat out every night she would'*. She is likely to *'prefer the bright lights and big cities when she travels'* and *'enjoys holidays where everything is organised for you'* and more likely than the average Australian to have been to a racetrack, seen a jazz, classical or blues performance or gone to a rock or pop music concert than the average Australian.

## Pantene buyers are slightly older and represent the traditional 'middle Australia'

Women comprise over two-thirds of Pantene's buyers and the sweet-spot is women aged 35-64. Over half of the buyers of Pantene are within this age group which includes Baby Boomers and Generation X.

The quintessential Pantene buyer in 2019 has a diploma or degree under her belt and is more likely than the average Australian to be working part-time and with an average household income of \$110,000.

She's more likely than the average Australian to be in the Roy Morgan Values Segments known as [Traditional Family Life](#) or [Real Conservatism](#) which *'is generally considered part of the establishment'*.



*Real Conservatives are willing to pay more for products which guarantee consistent value and quality and are particularly attracted to older and well established brands’.*

She is more likely than the average Australian to agree the ‘Government is doing a good job running the country’ and ‘the Australian economy appears to be improving’ although she also agrees that ‘crime is a growing problem in her community’. She enjoys popping out to a café for coffee or tea and is far more likely than the average Australian to be involved in dressmaking or working in her garden and more likely to watch horse racing/harness racing, swimming/diving or lawn bowls on TV.

### **Michele Levine, CEO of Roy Morgan, says:**

*“More Australians are buying shampoo than ever before with over 15.7 million buying shampoo today, up from 14.9 million four years ago and it is Head & Shoulders which is coming out on top as Australia’s most widely bought shampoo brand bought by 16.4% of shampoo buyers.*

*“The secret to Head & Shoulders success lies in clever marketing as this Procter & Gamble brand is the only shampoo in Australia’s top ten shampoos bought by more men than women. More than twice as many men buy Head & Shoulders (1.48 million) than the next most popular brand Alberto (730,000).*

*“Other leading shampoos including Alberto, TRESemmé, Pantene, Garnier Fructis, Schwarzkopf, Sunsilk and Herbal Essences (Clairol) are largely dominated by female buyers with over three-fifths of the customers of these brands being women. Overall women do comprise a clear majority of 58% of shampoo market compared to 42% for men.*

*“These insights from the Roy Morgan Single Source data give a glimpse into how the Australian shampoo market operates and the competitive tensions at play between a wide variety of brands and manufacturers competing over the right to keep your hair clean and looking good.*

*“Contact Roy Morgan to learn more about the Australian shampoo market as well as other hair and beauty products and what drives the purchasing decisions of consumers in these markets.”*

**For comments or more information about Roy Morgan’s shampoo data – including information on leading brands such as Head & Shoulders, Alberto, Pantene, TRESemmé, Palmolive, Garnier Fructis, Dove, Schwarzkopf, Sunsilk, Herbal Essences, Organic care and more, please contact:**

**Roy Morgan Enquiries**  
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### **Related research findings**

Find out more about Australians who buy different shampoo brands including [Head & Shoulders](#), [Alberto](#), [Pantene](#), [TRESemmé](#), [Palmolive](#), [Garnier Fructis](#), [Dove](#), [Schwarzkopf](#), [Sunsilk](#), [Herbal Essences](#), [Organic Care](#) and other brands of shampoo.

### **About Roy Morgan**

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 75 years’ experience in collecting objective, independent information on consumers.

### **Margin of Error**

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

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Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2