

# Report – Nordic Hair 2010

Quantitative study of the female consumer's hair issues in Sweden

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Petra Laru, Laura Westerdahl



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- 4) Purchasing behaviour - hair care products
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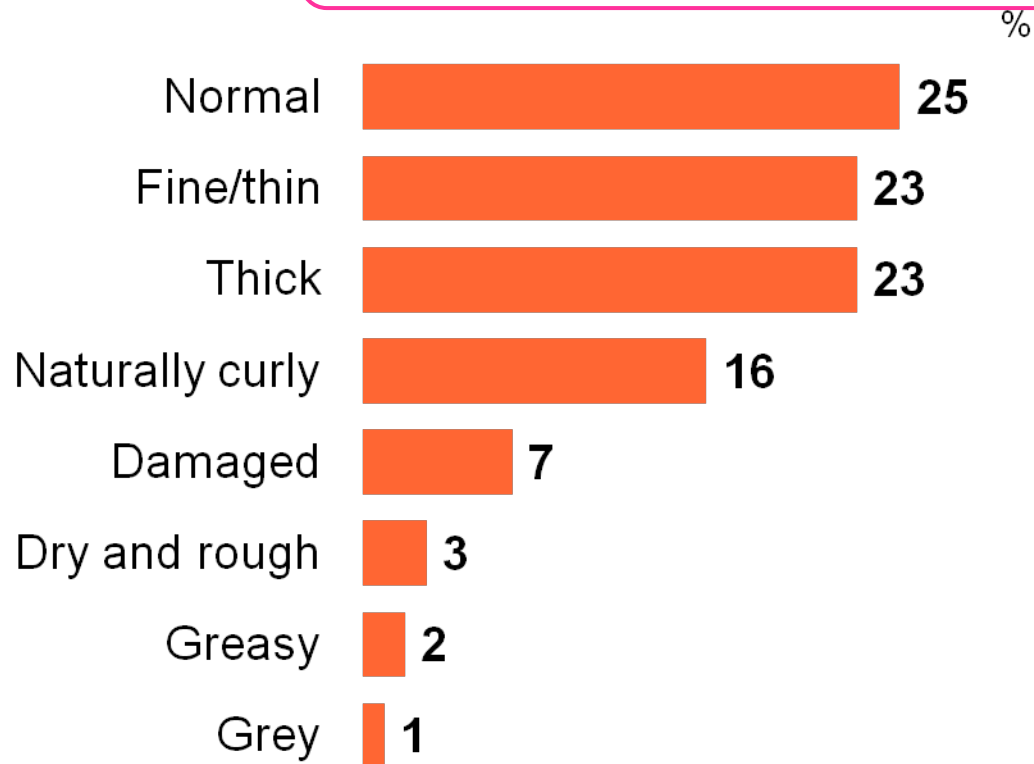
# Swedish results

## 1) My hair

# Hair type



Younger women (16-20 y.o.) have more often damaged hair (13%), but only 4% of women 31-40 y.o.



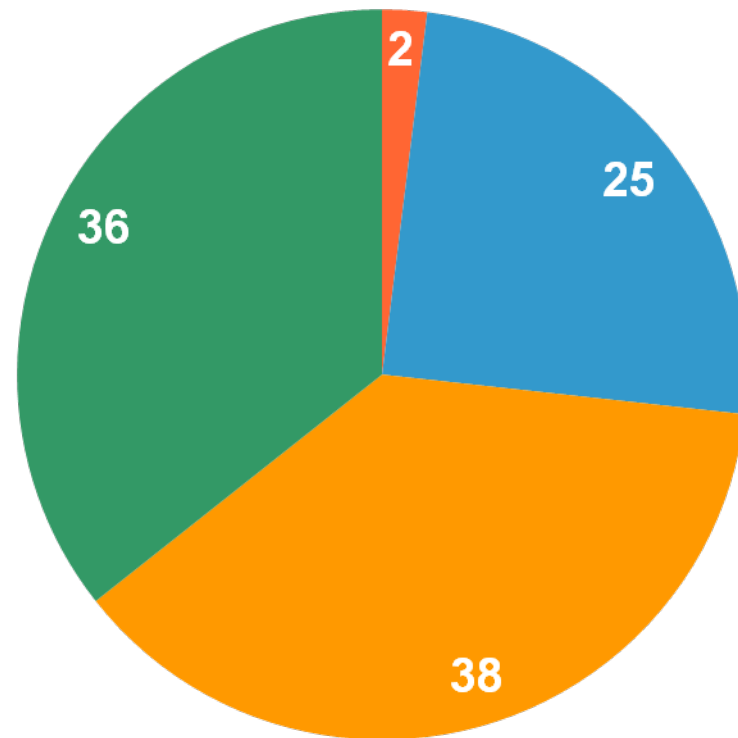
Base: All, 1000 interviews

# Hair length



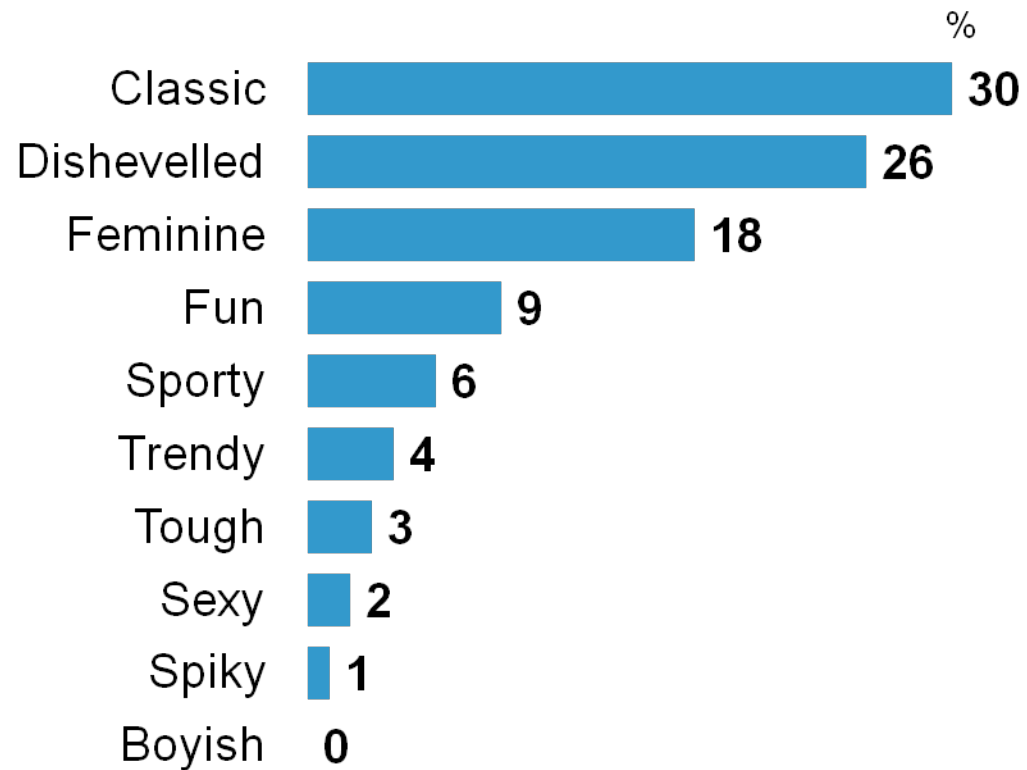
6 in 10 younger women (16-20 y.o.) have hair longer than shoulder length

- Very short
- Short
- Shoulder length
- Longer



Base: All, 1000 interviews

# Type of haircut



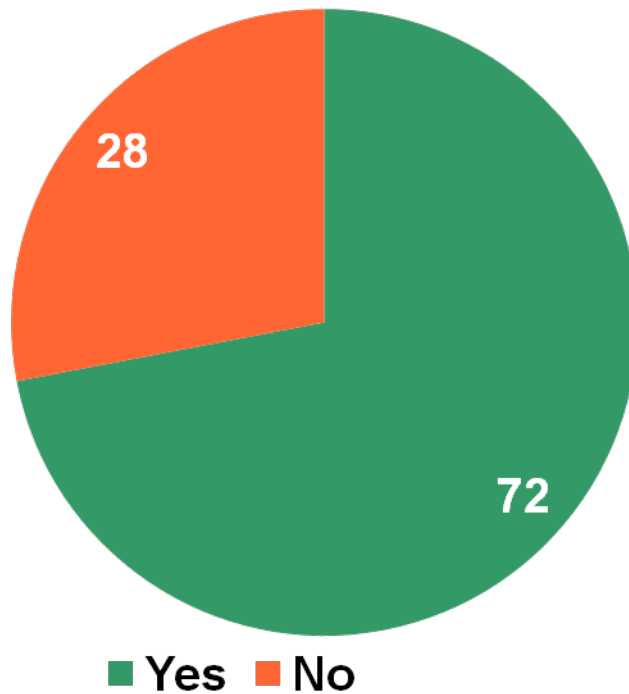
Base: All, 1000 interviews

# Beautiful hair and Damaged hair



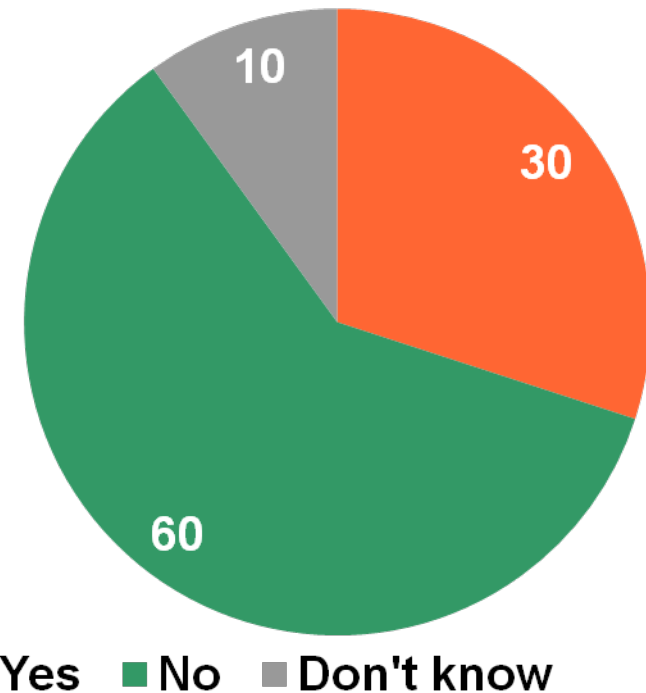
8 in 10 younger women (16-20 y.o.) say they have beautiful hair.

### Think they have beautiful hair



39% of women aged 16-20 claim they have damaged hair

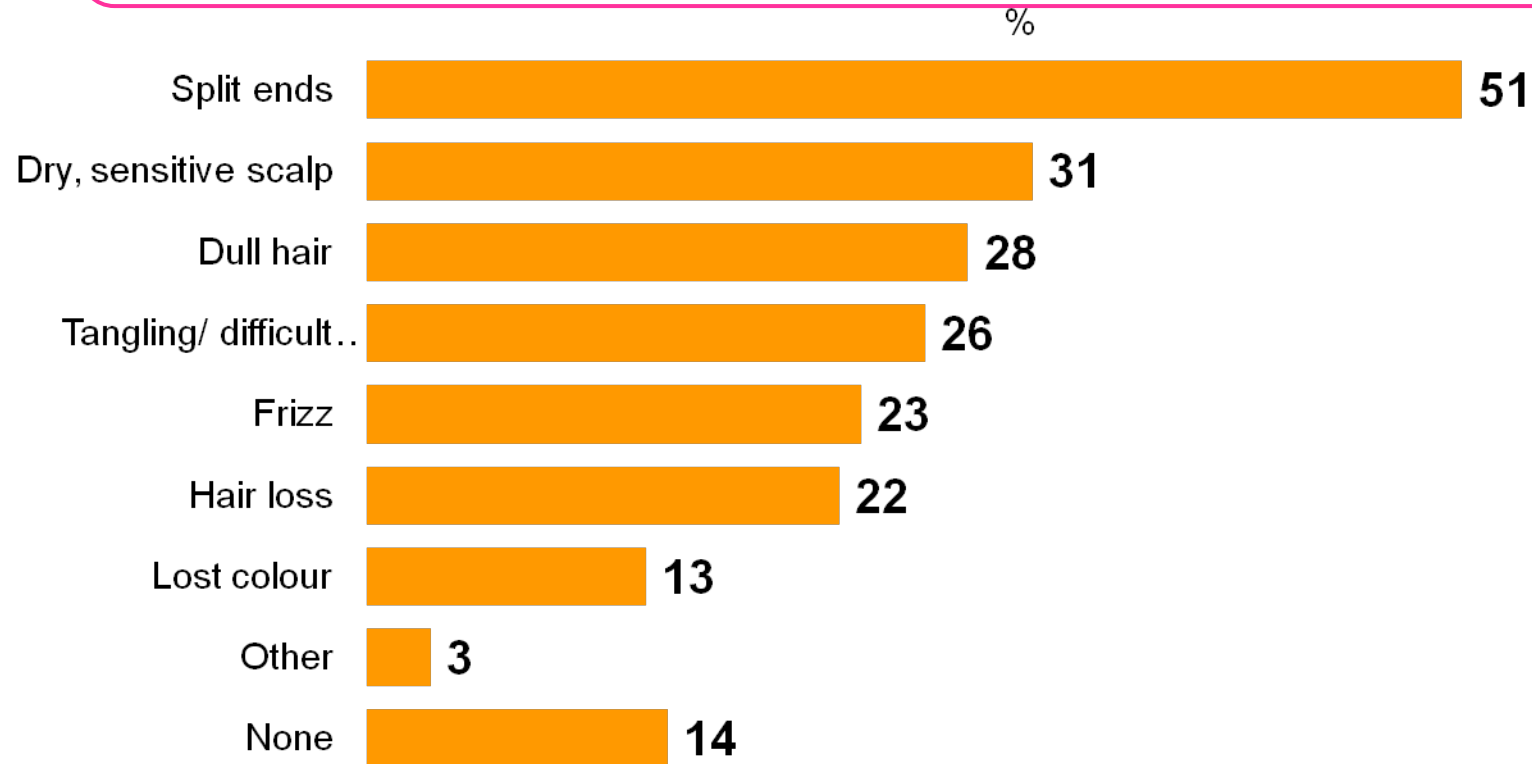
### Think they have damaged hair



# Hair problems experienced past 12 months



Split ends is most common among the younger women (73%).  
Older women (41-50 y.o.) have the healthiest hair, with 1 in 4 saying they have not experienced any problems



Base: All, 1000 interviews

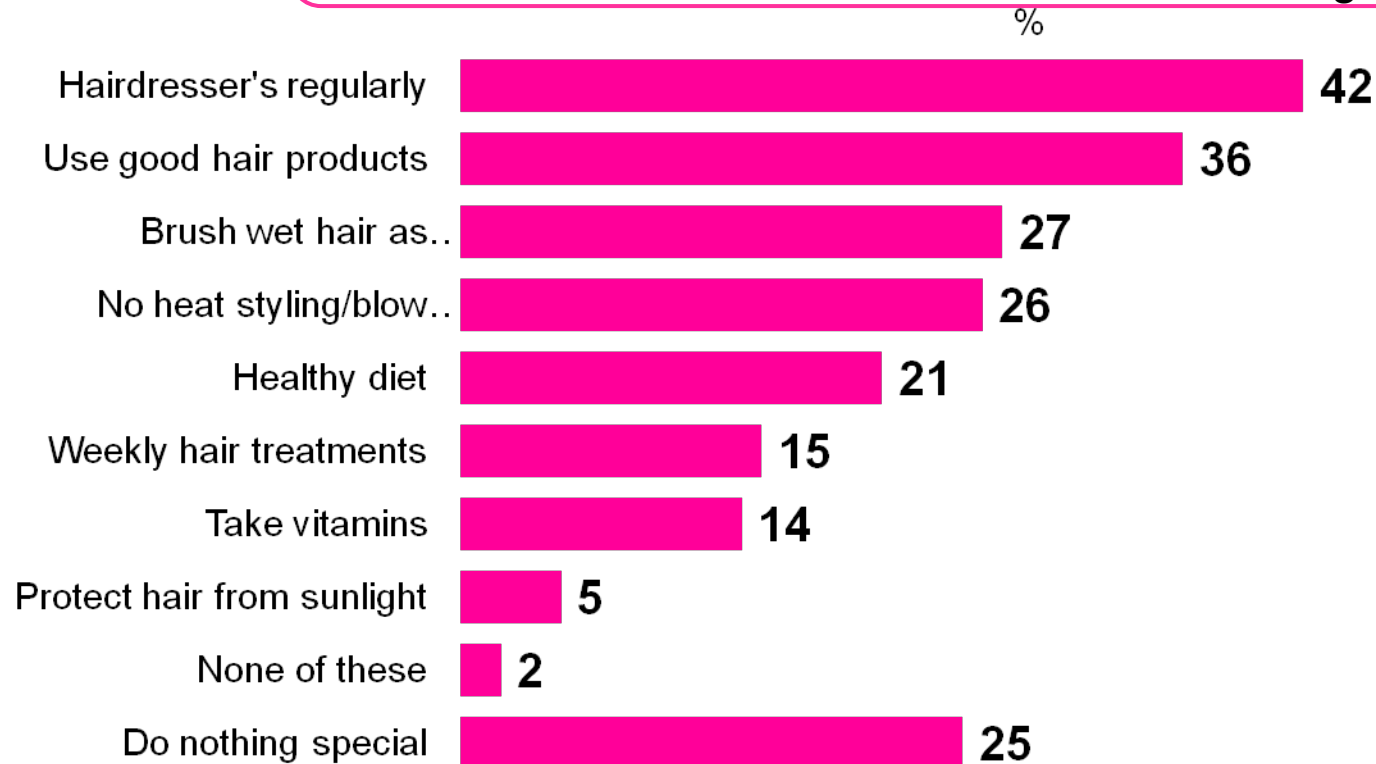


# Ways with which women look after their hair



## Regular visits to the hairdresser's most common

Brushing wet hair as little/as carefully as possible is the most common answer in the younger age group (45%), and only less than 1 in 4 visits the hairdresser's regularly



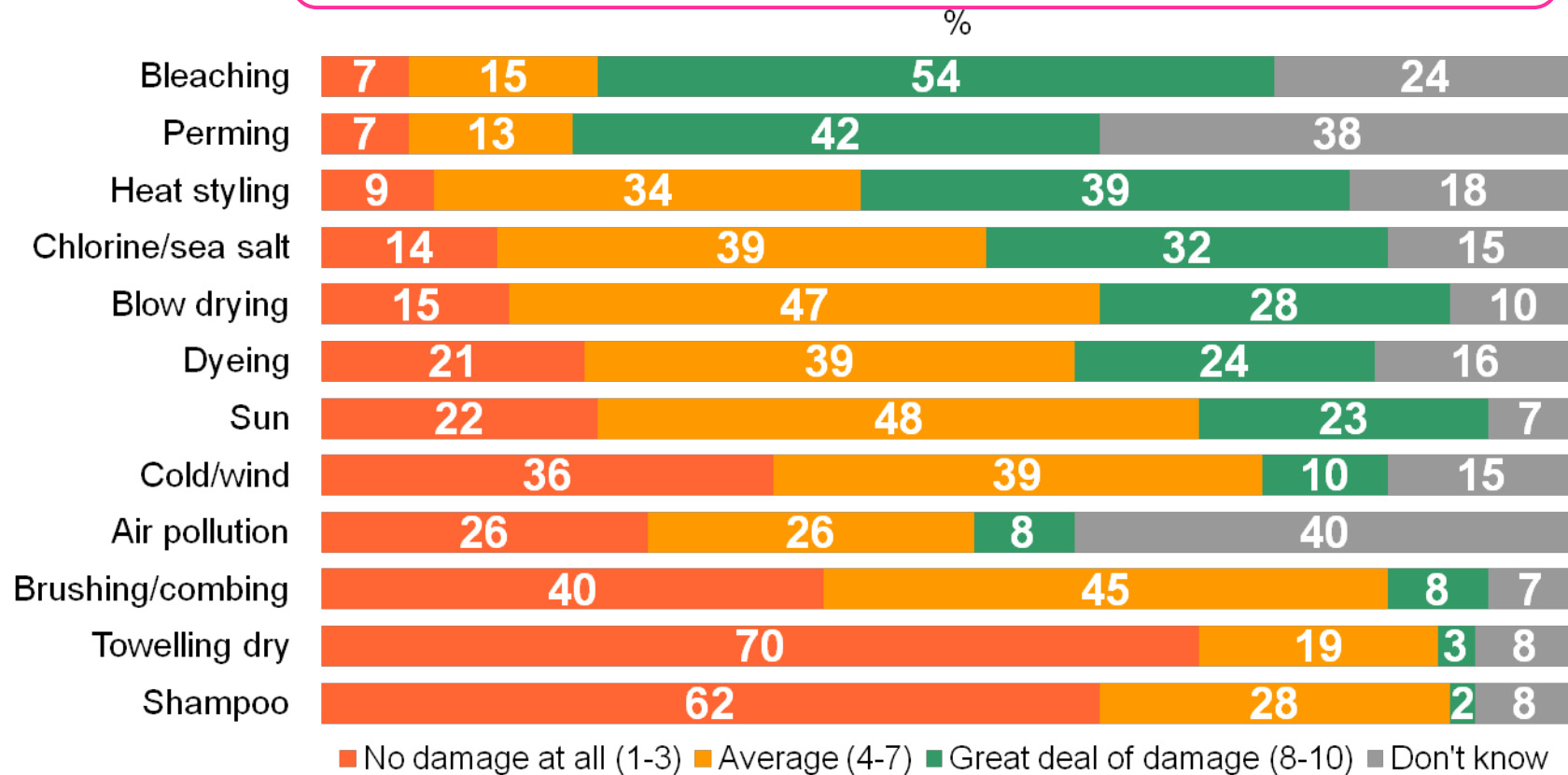
Base: All, 1000 interviews

# Hair damaging factors



Top box – have answered 8-10 on 10-point scale

Awareness about how air pollution and perming can damage one's hair is low overall.



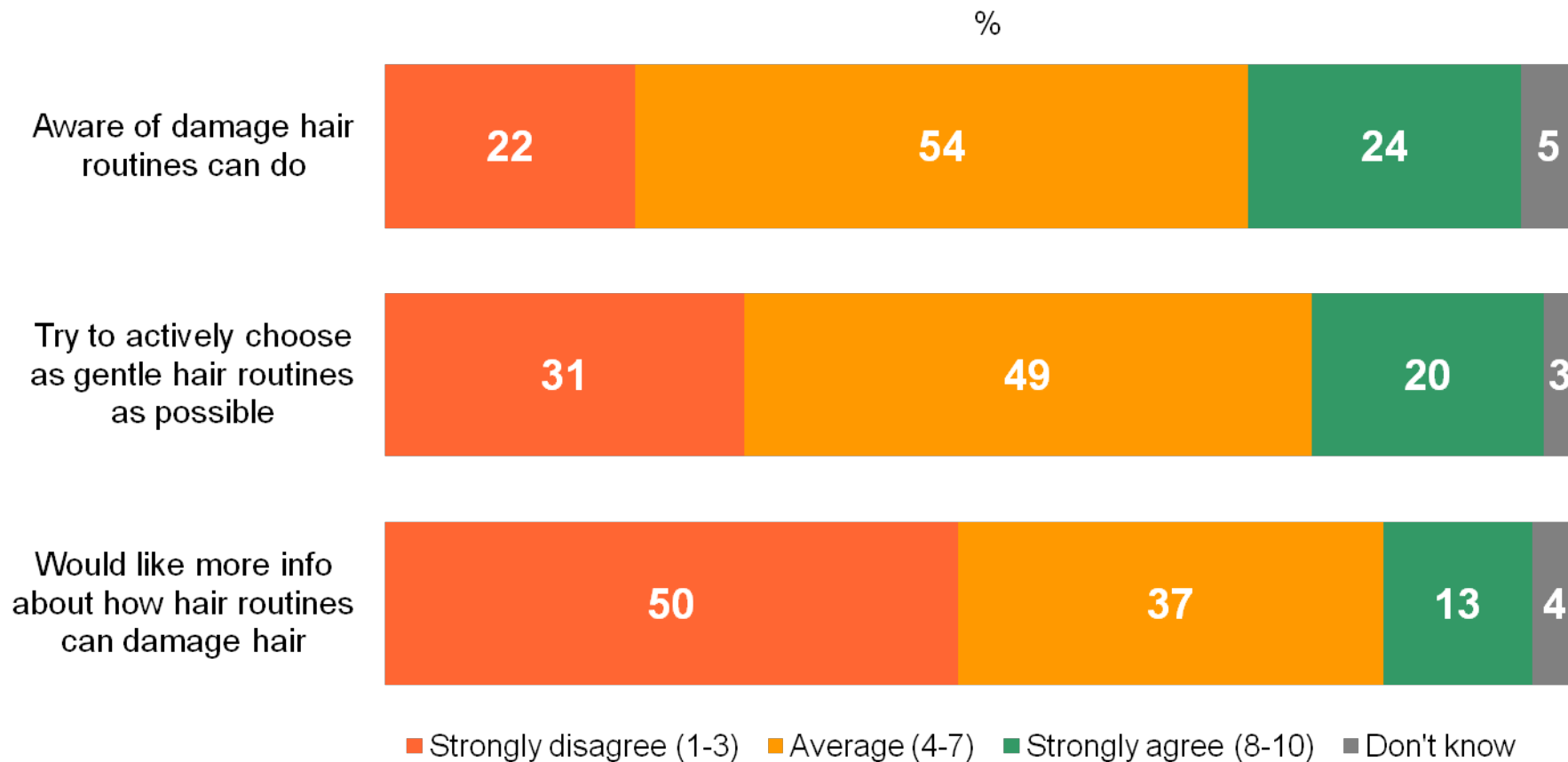
Base: All, 1000 interviews

# Hair damaging factors: awareness and attitude



Top box – have answered 8-10 on 10-point scale

Surprisingly, 1 in 2 does not feel the need to learn more about how hair routines can damage their hair. However, younger women do wish to receive information; only 29% specifically say they do not want it

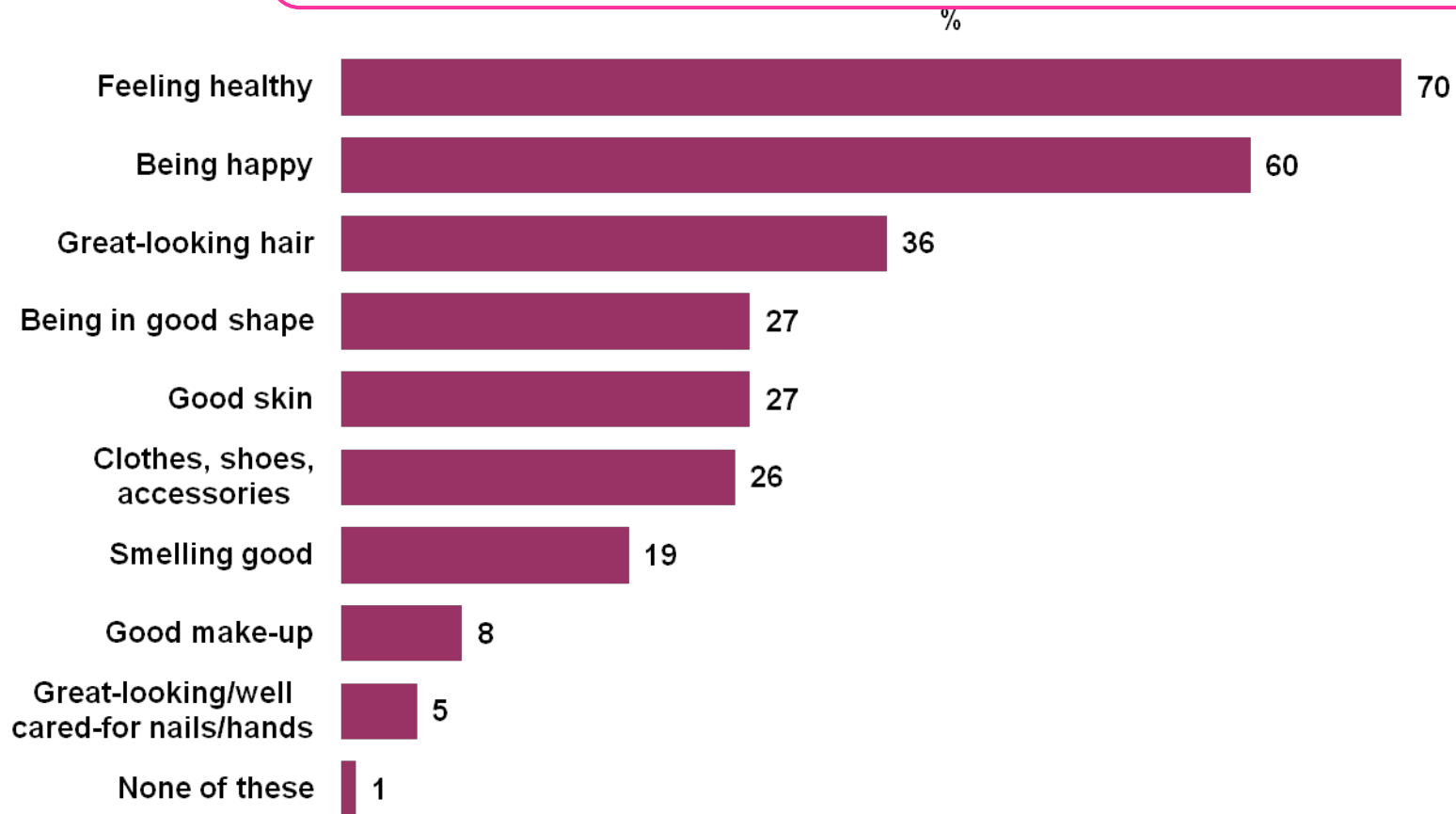


# Most important to own self esteem



## Great-looking hair most important among body-related issues

Being happy is most important among younger women (51%).  
Great-looking hair and feeling healthy come as a close second, with a share of answers of 48%

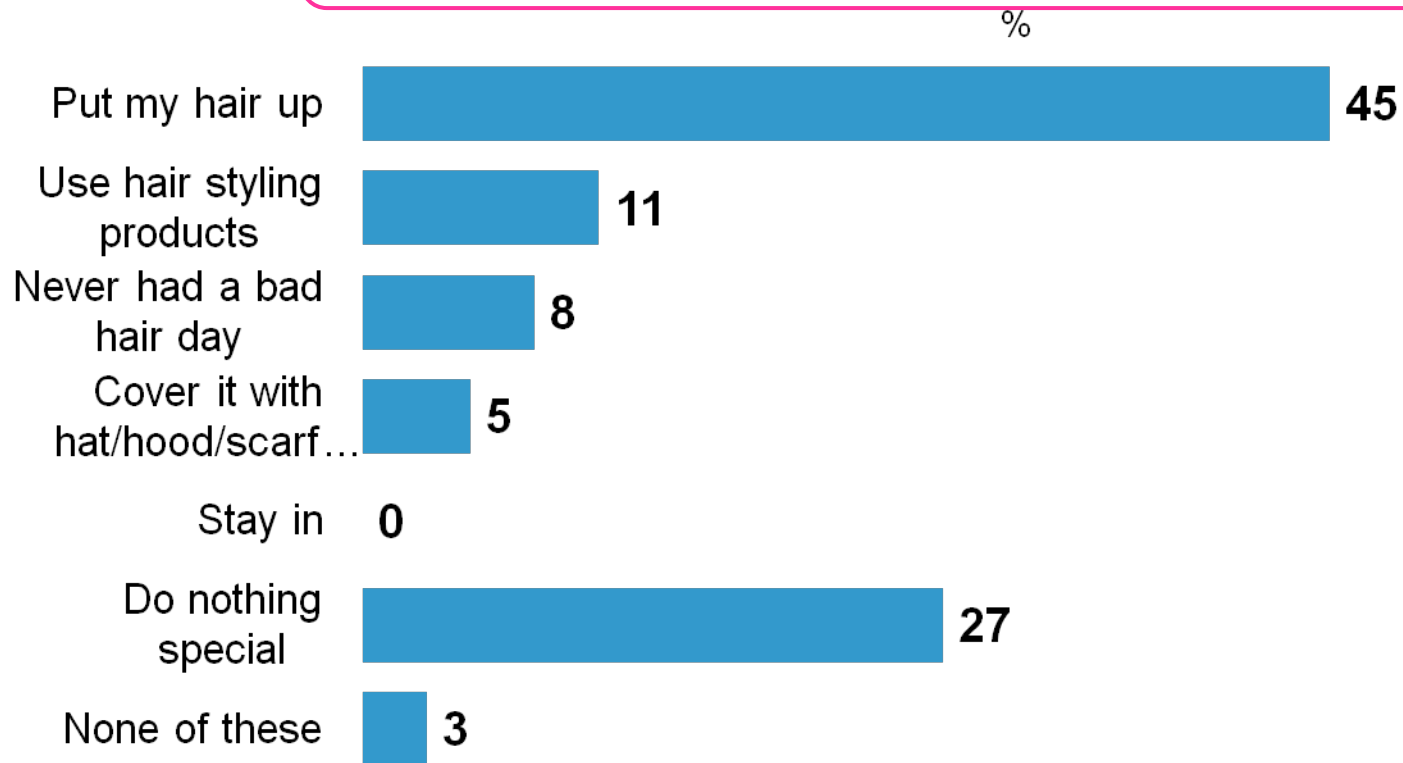


# In case of bad hair day

Putting one's hair up will do the trick!



Younger women are more prone to stay at home if they had a bad hair day; 2% answer they wouldn't go out



Base: All, 1000 interviews

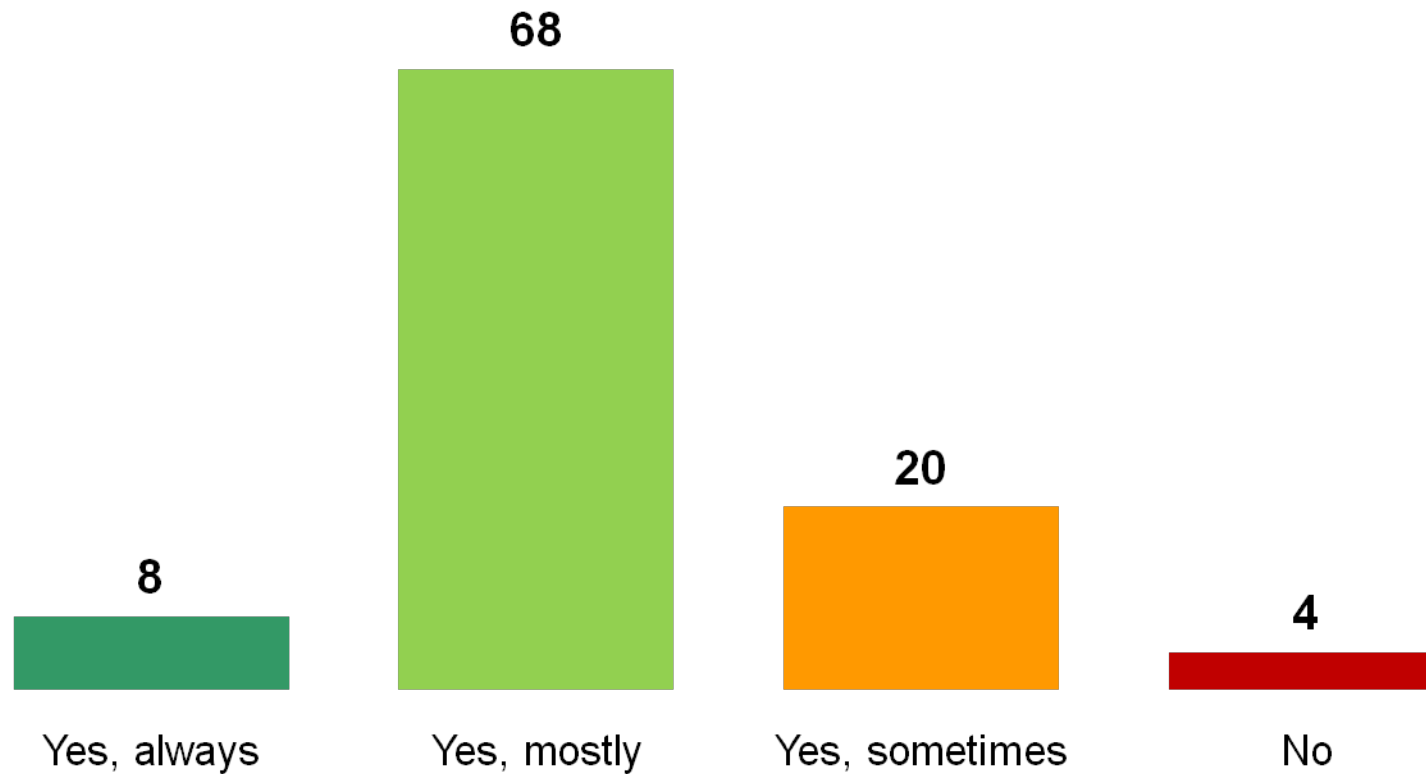
# In general, are you happy with your hair?



Most women are happy with their hair

12% of younger women are **always** happy with their hair!

%



Base: All, 1000 interviews

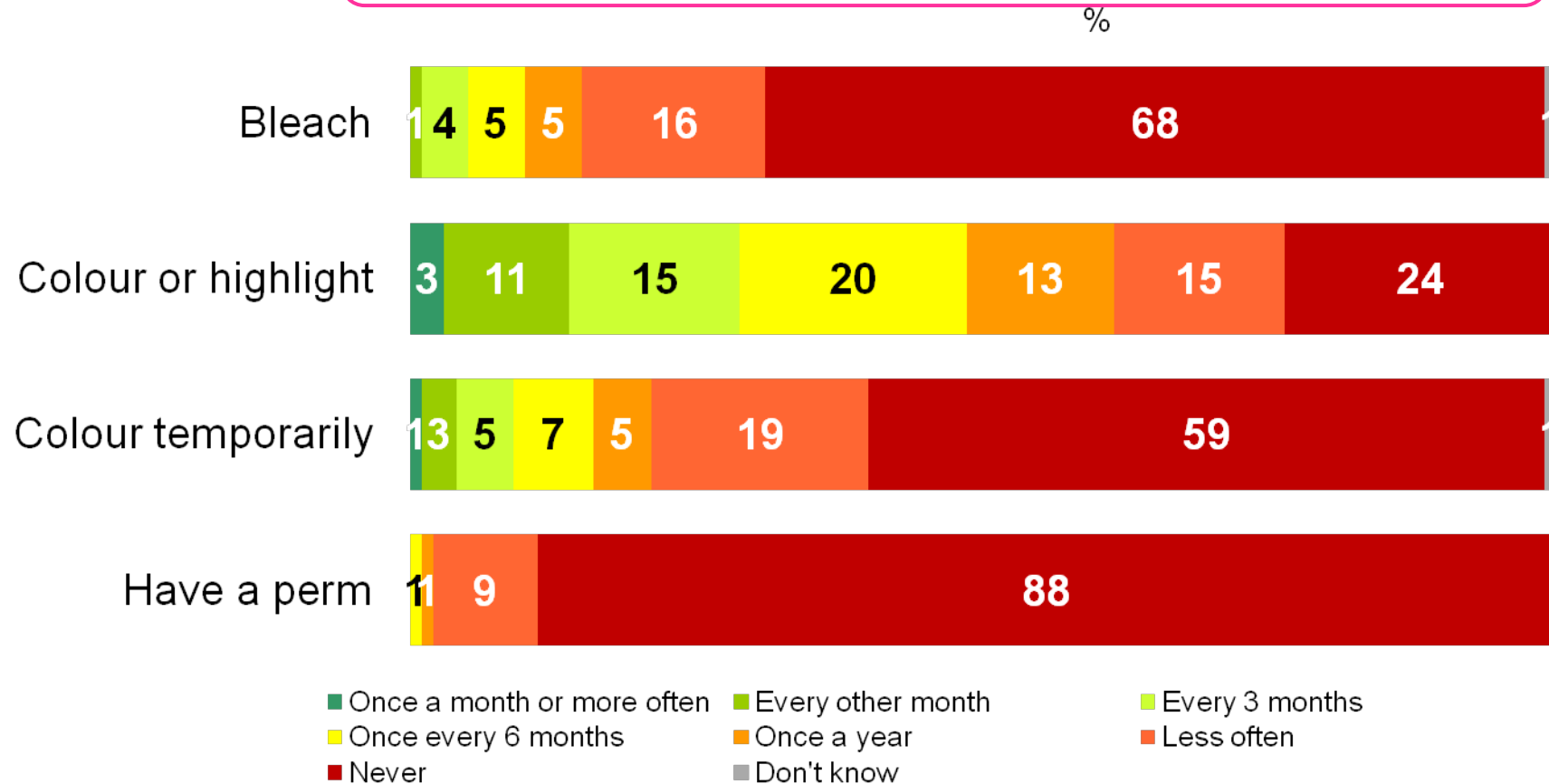
# Swedish results

## 2) Hair routines

# Frequency of different treatments



More younger women bleach their hair. On the other hand, the other treatments are less common



Base: All, 1000 interviews

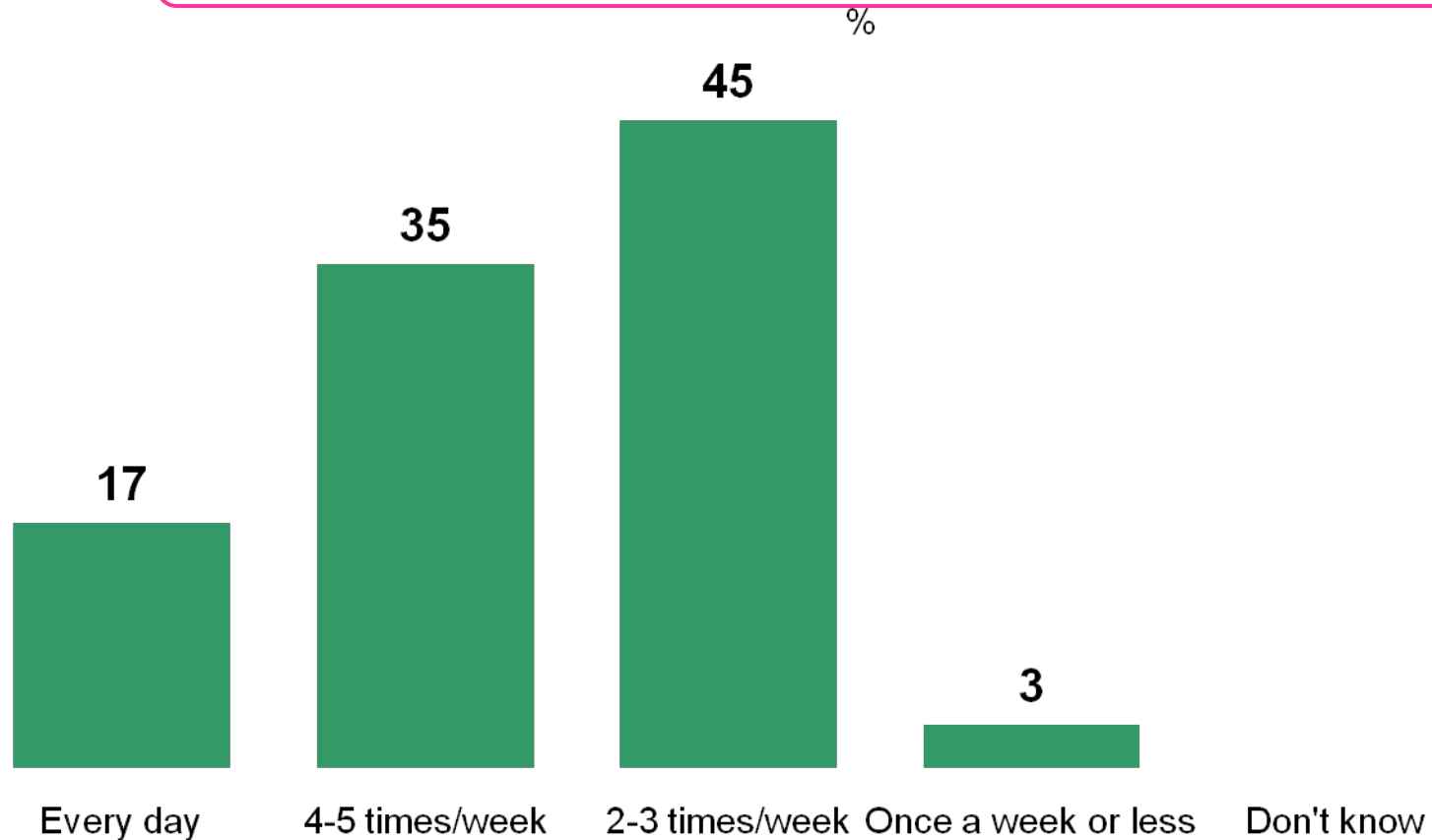


# Frequency – hair washing



Women wash their hair 2,9 times a week in average

Younger women wash their hair 4 times a week in average

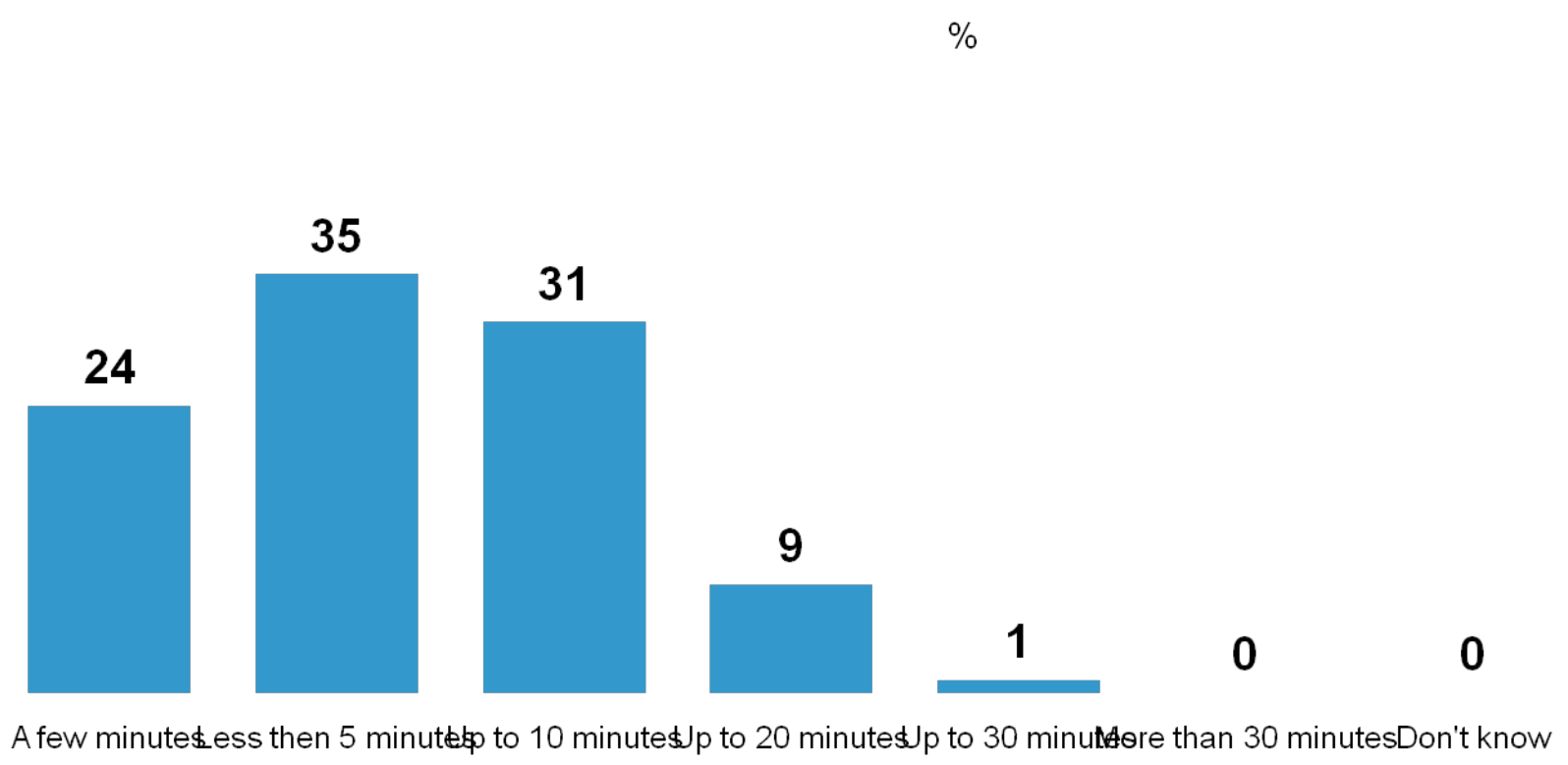


# Time spent daily on hair – average



6 in 10 spend less than 5 minutes every day

Women aged 16-20 spend more time on their hair; 20% answer that they spend up to 20 or up to 30 minutes in average every day

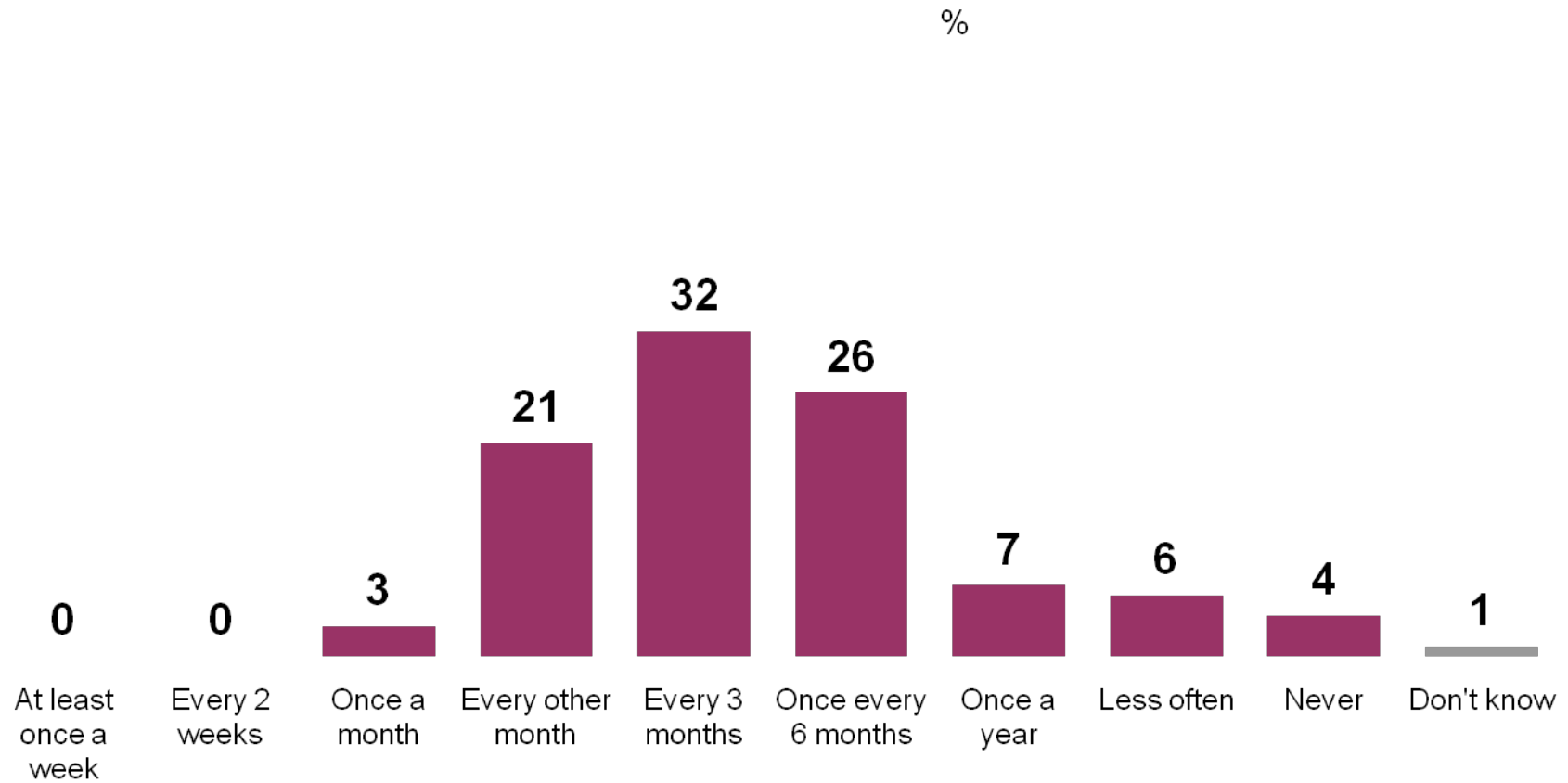


Base: All, 1000 interviews

# Frequency – visit hairdresser's



Go to hairdresser's to have hair cut/coloured or put hair up etc



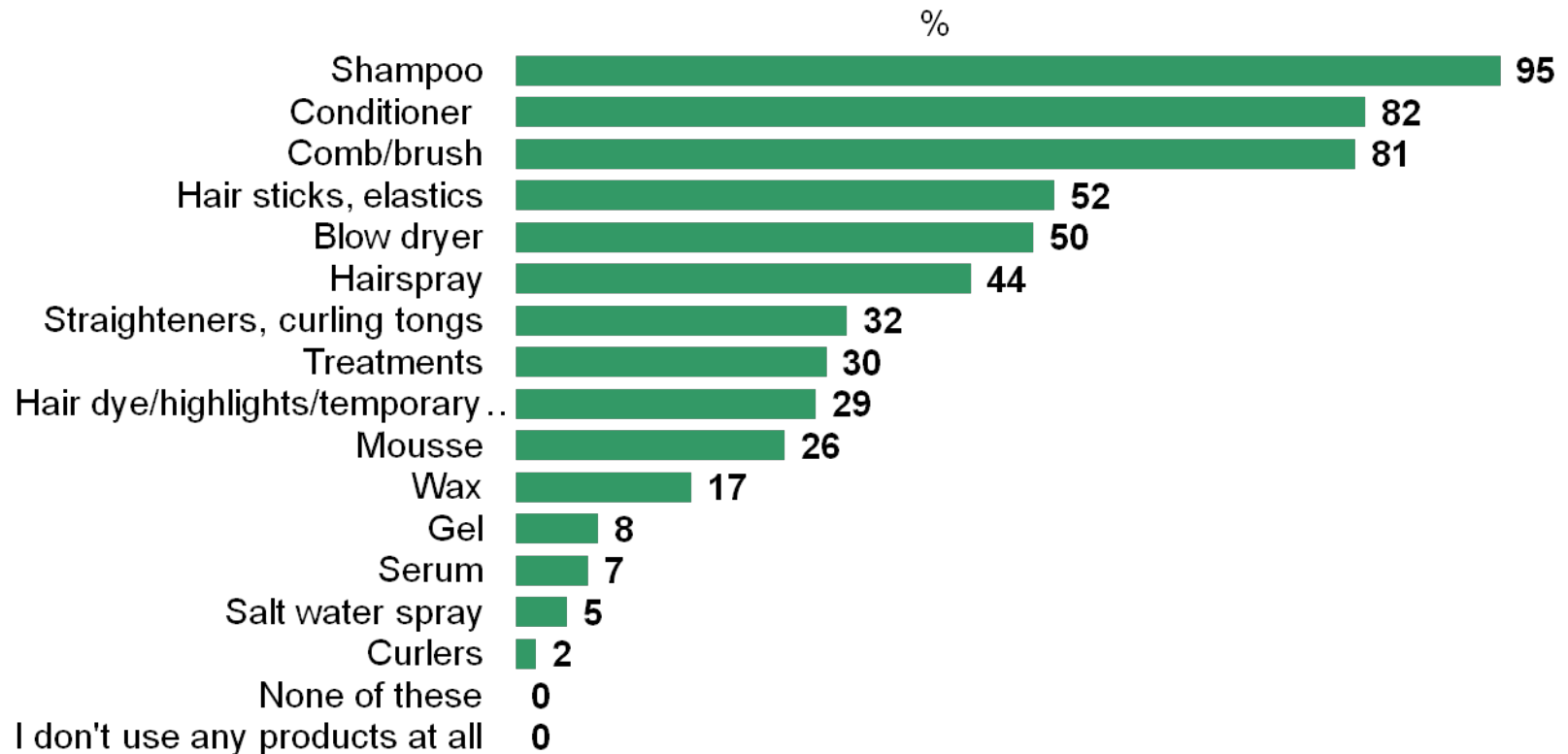
# Swedish results

## 3) Hair care

# Hair care products regularly used



The following are even more common among younger women: conditioner (88%), hair sticks/elastics (70%), straighteners/curling tongs (52%)

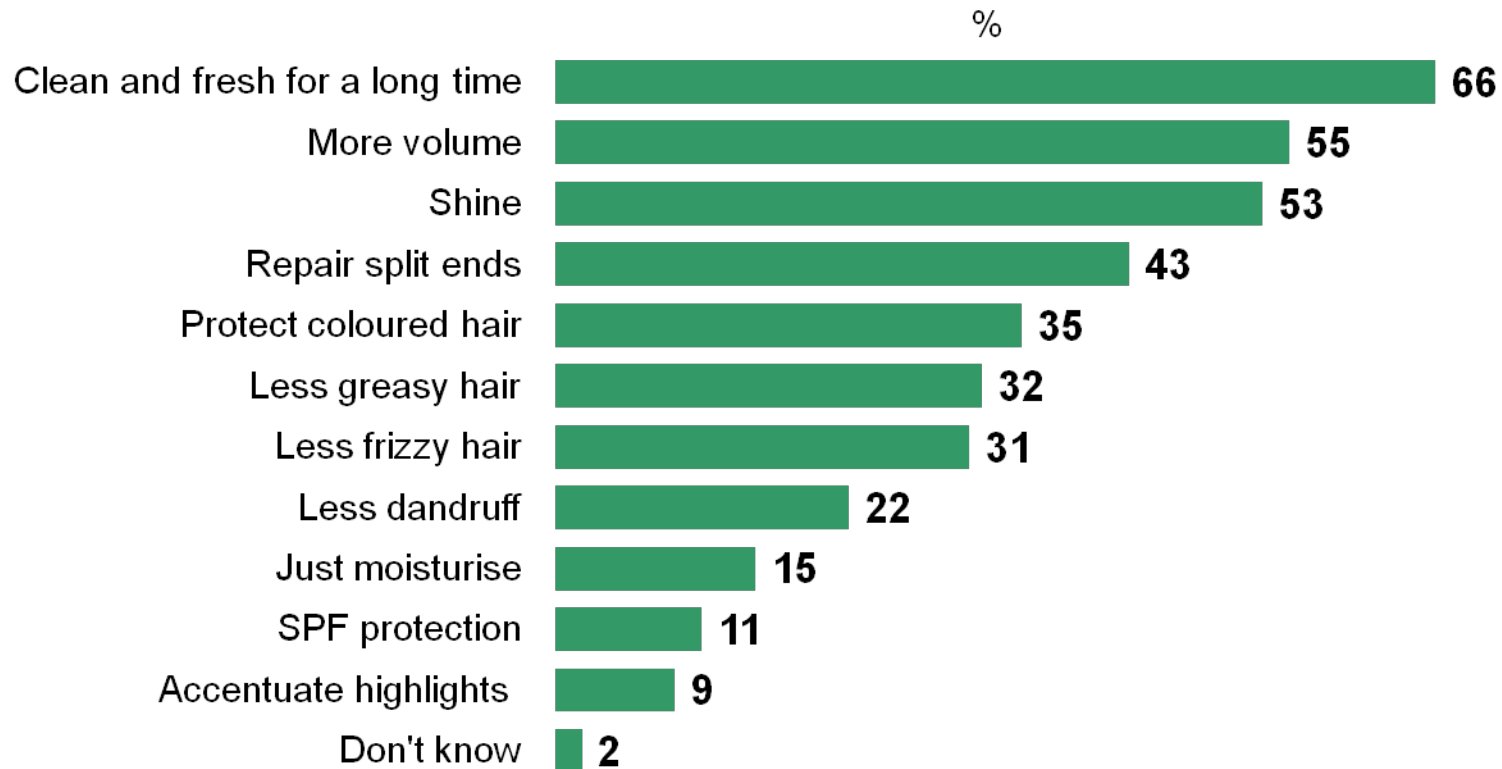


Base: All, 1000 interviews

# Expectations on hair care products



Top 3 among younger women: clean and fresh for a long time (76%), repair split ends (66%), more volume (60%)

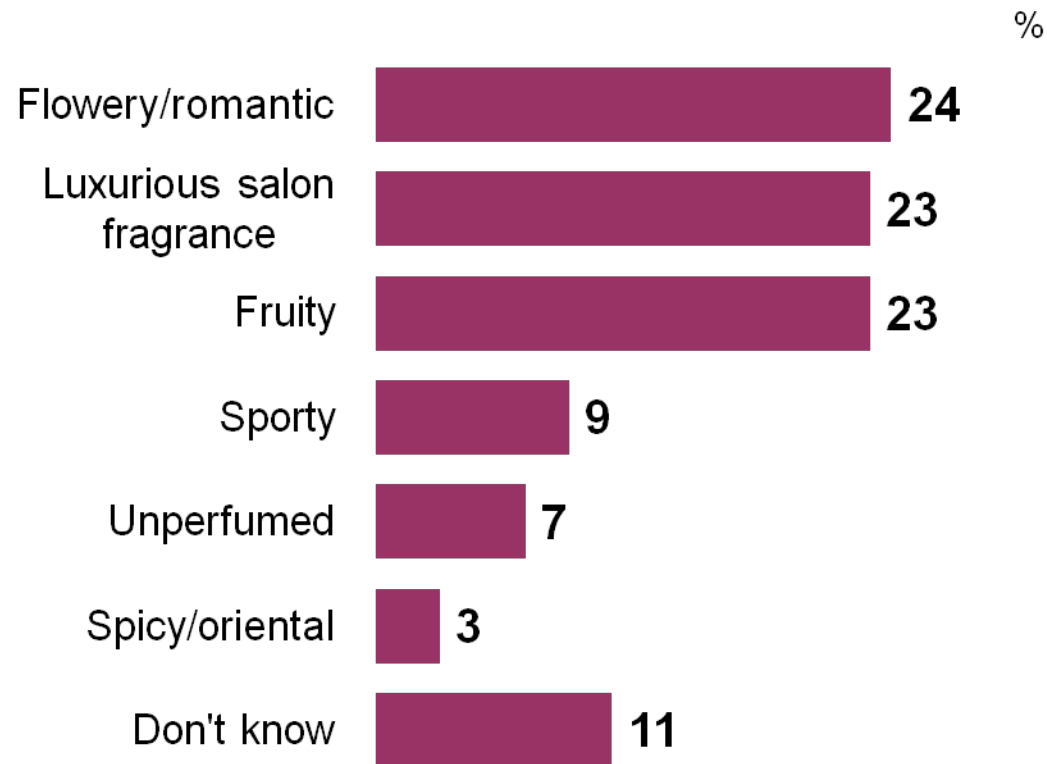


Base: All, 1000 interviews

# Preferred shampoo fragrance



Younger women prefer a flowery/romantic fragrance (35%)  
or a fruity one (33%)



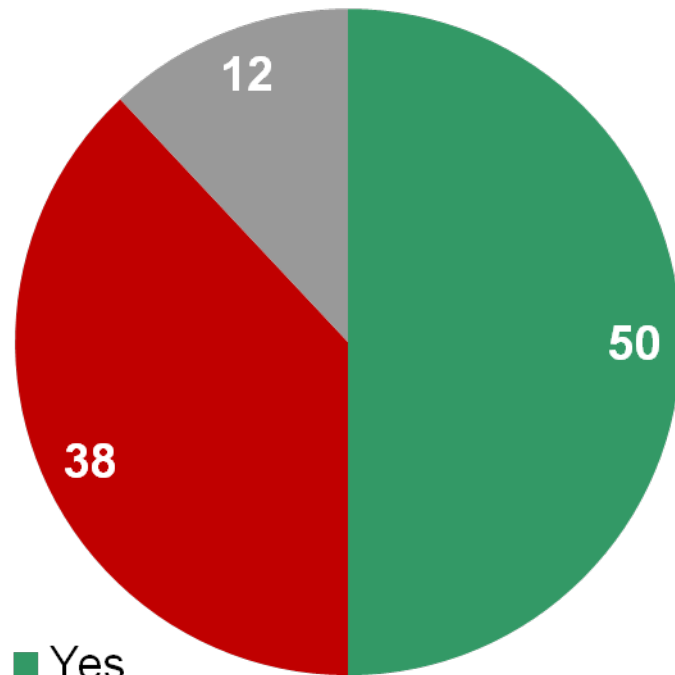
Base: All, 1000 interviews

# Damaged hair/split ends

29% of younger women claim they do nothing about it

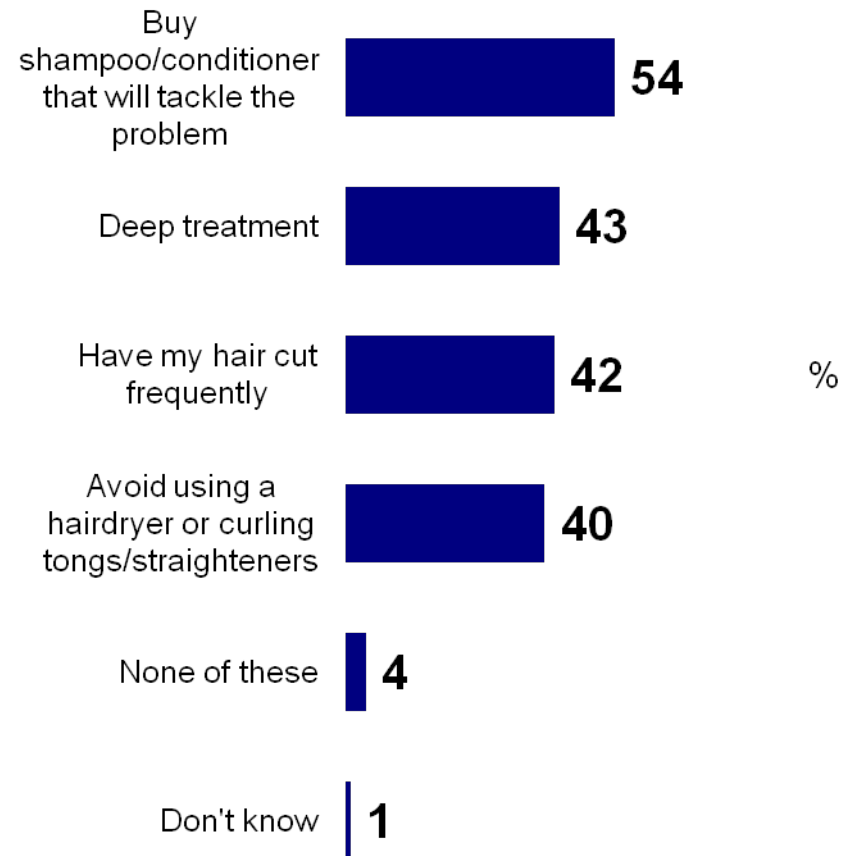


### Do you do anything to avoid damaged hair/split ends?



■ Yes  
■ No  
■ Don't know

### What do you do to avoid damaged hair/split ends?



Base: All, 1000 interviews

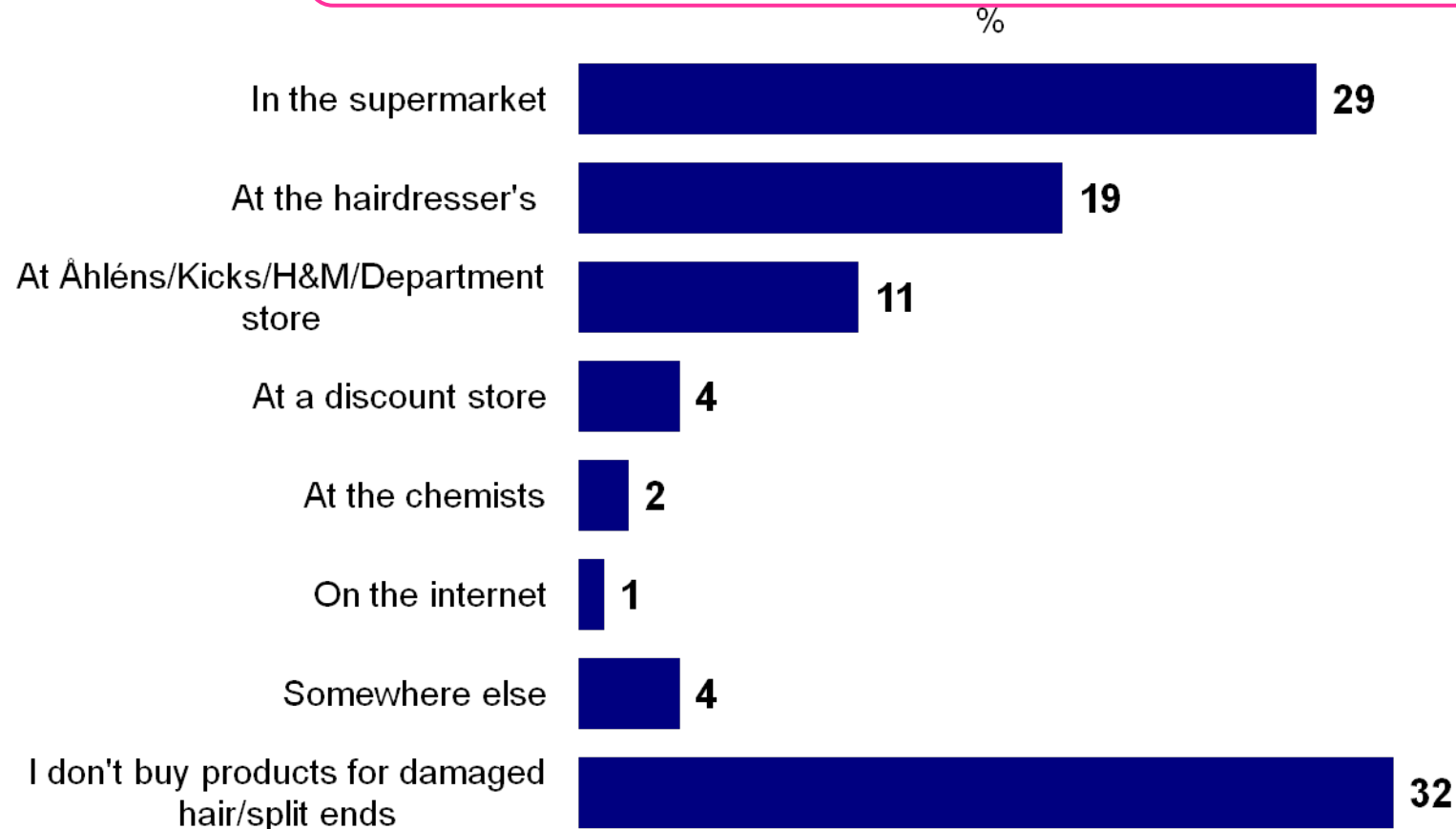
Base: Do something to avoid damaged hair, 508 interviews



# Point of purchase for products for damaged hair



35% of younger women buy these products in the supermarket and 18% at a department store



Base: All, 1000 interviews

# Swedish results

## 4) Purchasing behaviour – hair care products

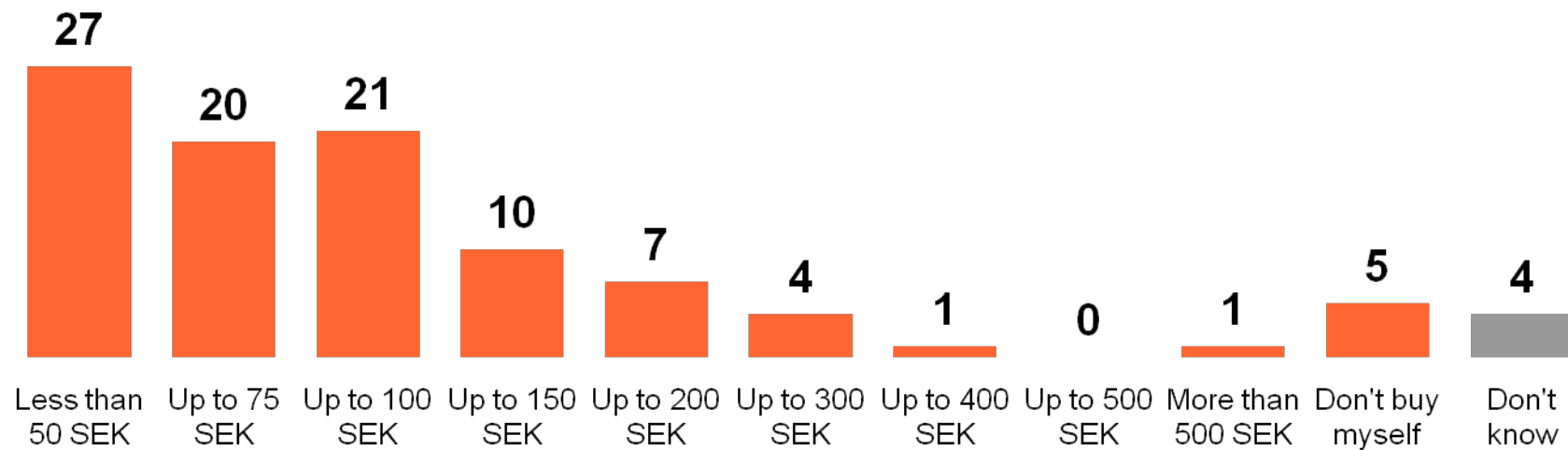
# Hair care products



Average monthly spending is approx. 83 SEK

Average monthly spending amongst women  
16-20 years old is approx. 64 SEK.  
3 in 10 don't buy these products themselves

%

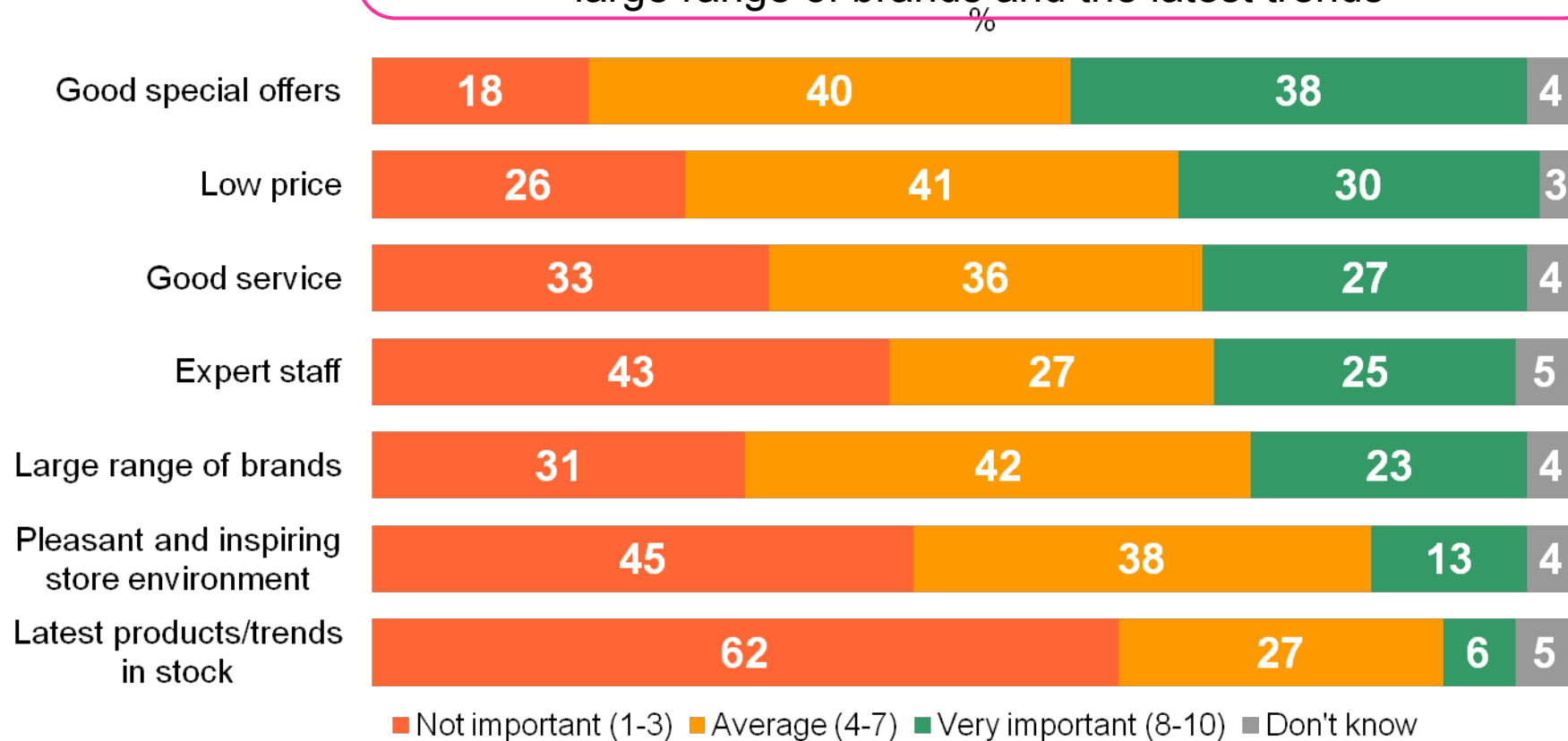


Base: All, 1000 interviews

# Important when choosing where to buy hair care products



“Good special offers” less important to younger women, probably because they most often don’t buy these products themselves. To them it is more important that the PoP stocks a large range of brands and the latest trends



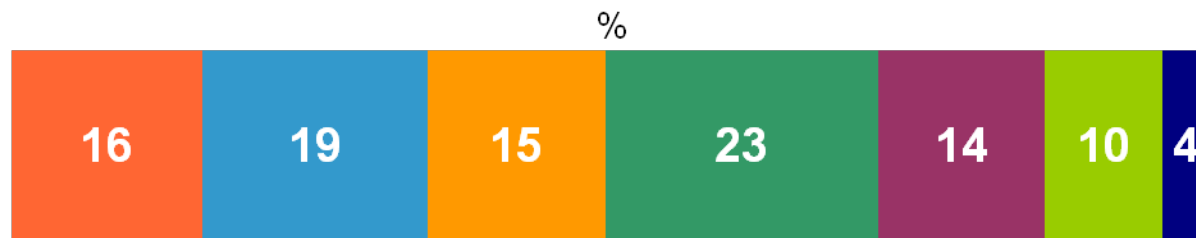
Base: All, 1000 interviews

# Brand loyalty and experimentalism



Younger women are less brand loyal

When I buy shampoo/ conditioner, I always choose the same brand



When I buy shampoo/ conditioner, I always choose a different brand

I can't imagine trying new hair care products

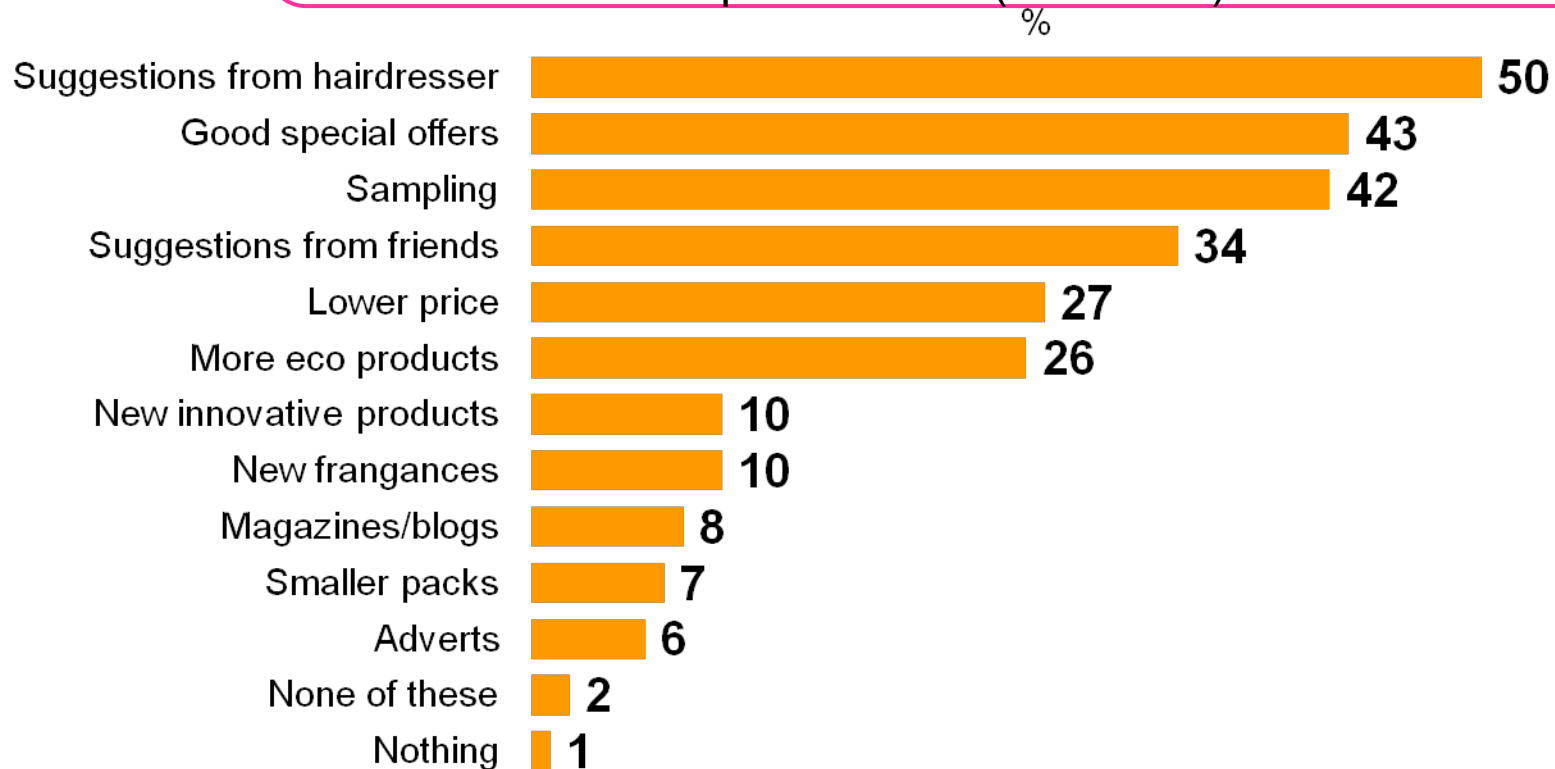


I enjoy trying new hair care products

# What would make you try new hair care products?



Sampling is the most mentioned answer among younger women (42%). Their hairdresser's suggestions come in second place (41%), followed by suggestions from friends and good special offers (both 39%)

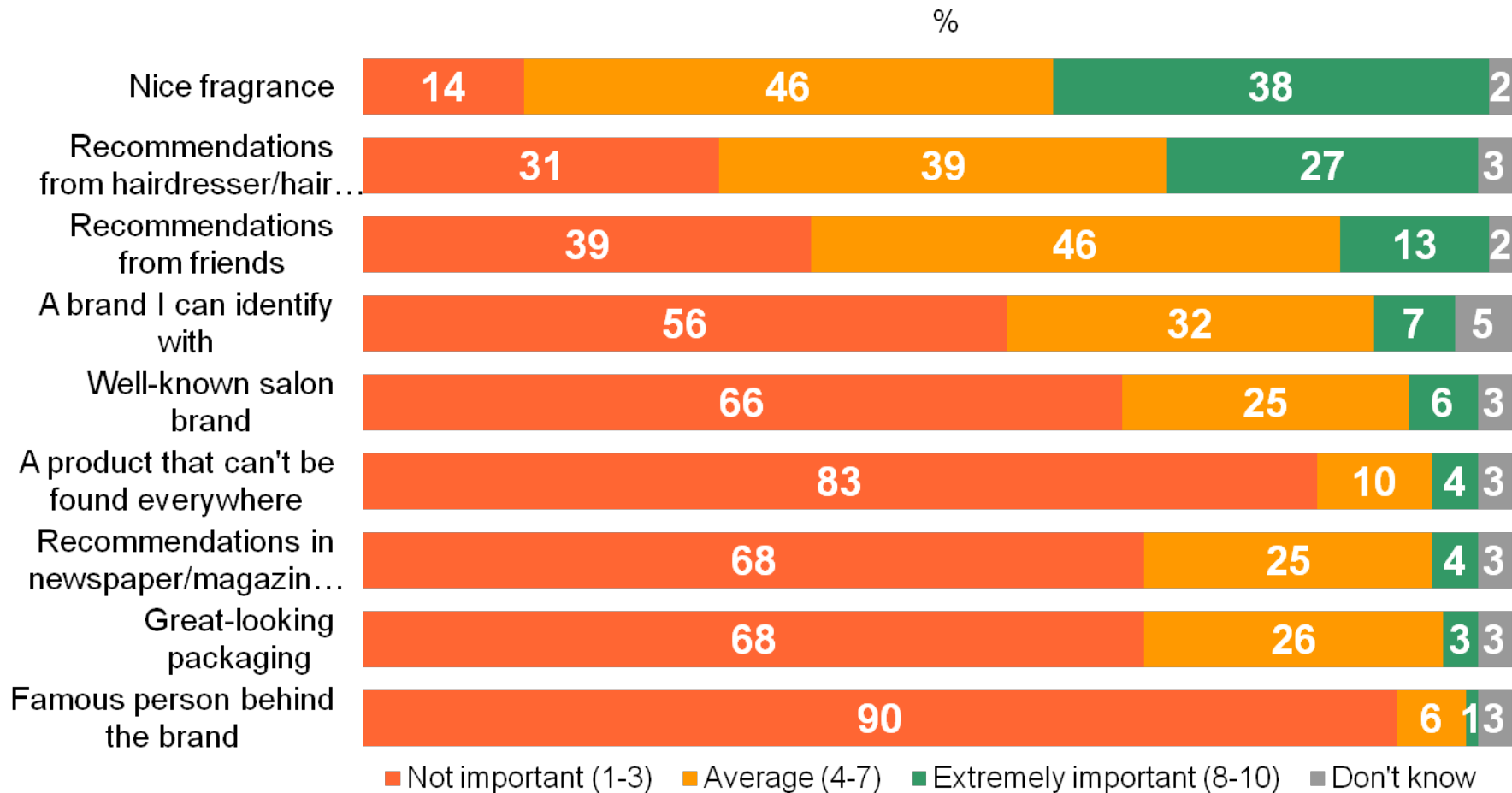


Base: All, 1000 interviews

# Important when buying shampoo/conditioner



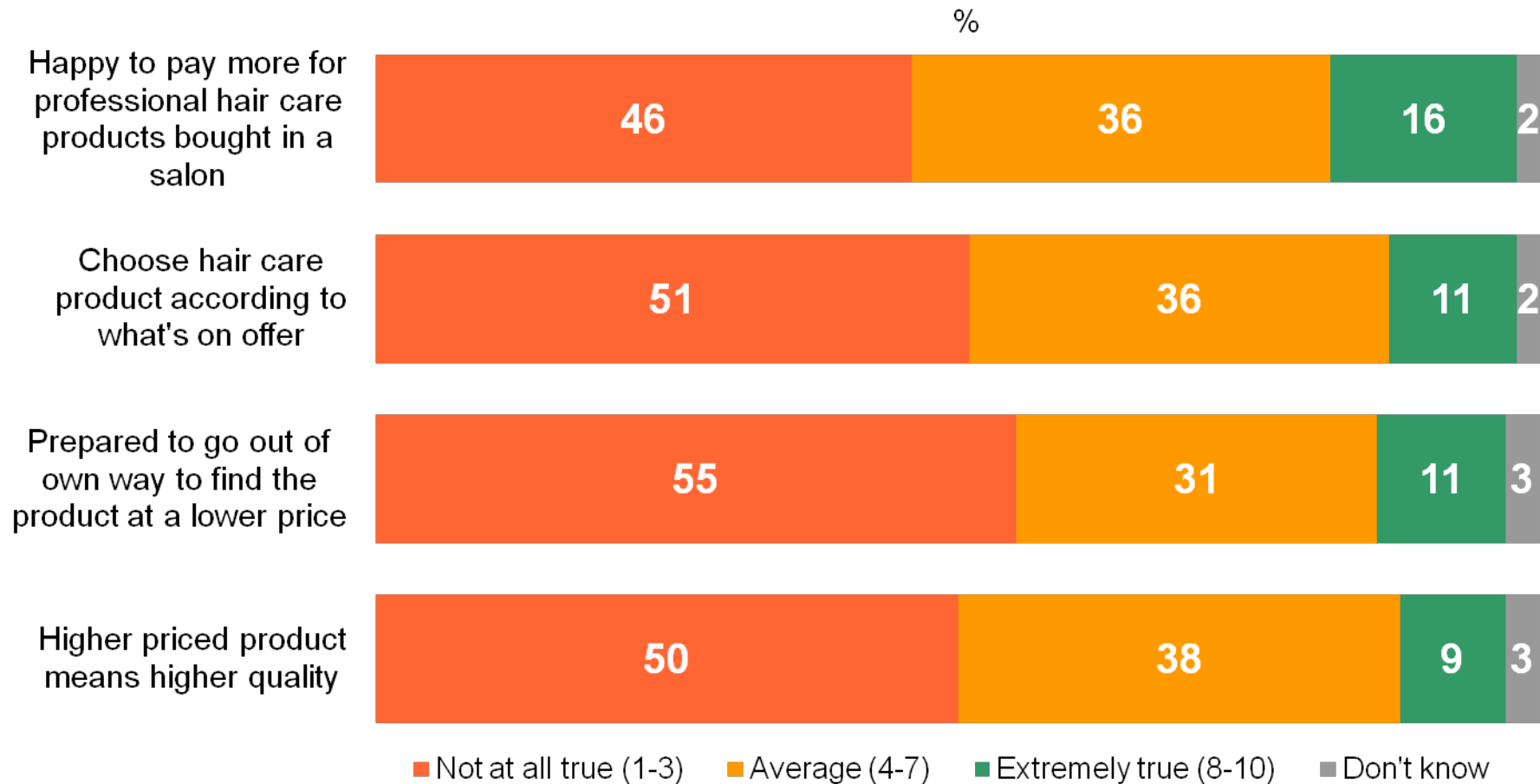
Frangrance even more important among younger women (52%)



# Attitudes about buying shampoo/conditioner



Younger women are more likely to go out of their own way to find cheaper products (17%).  
14% also believe that a higher price equals higher quality

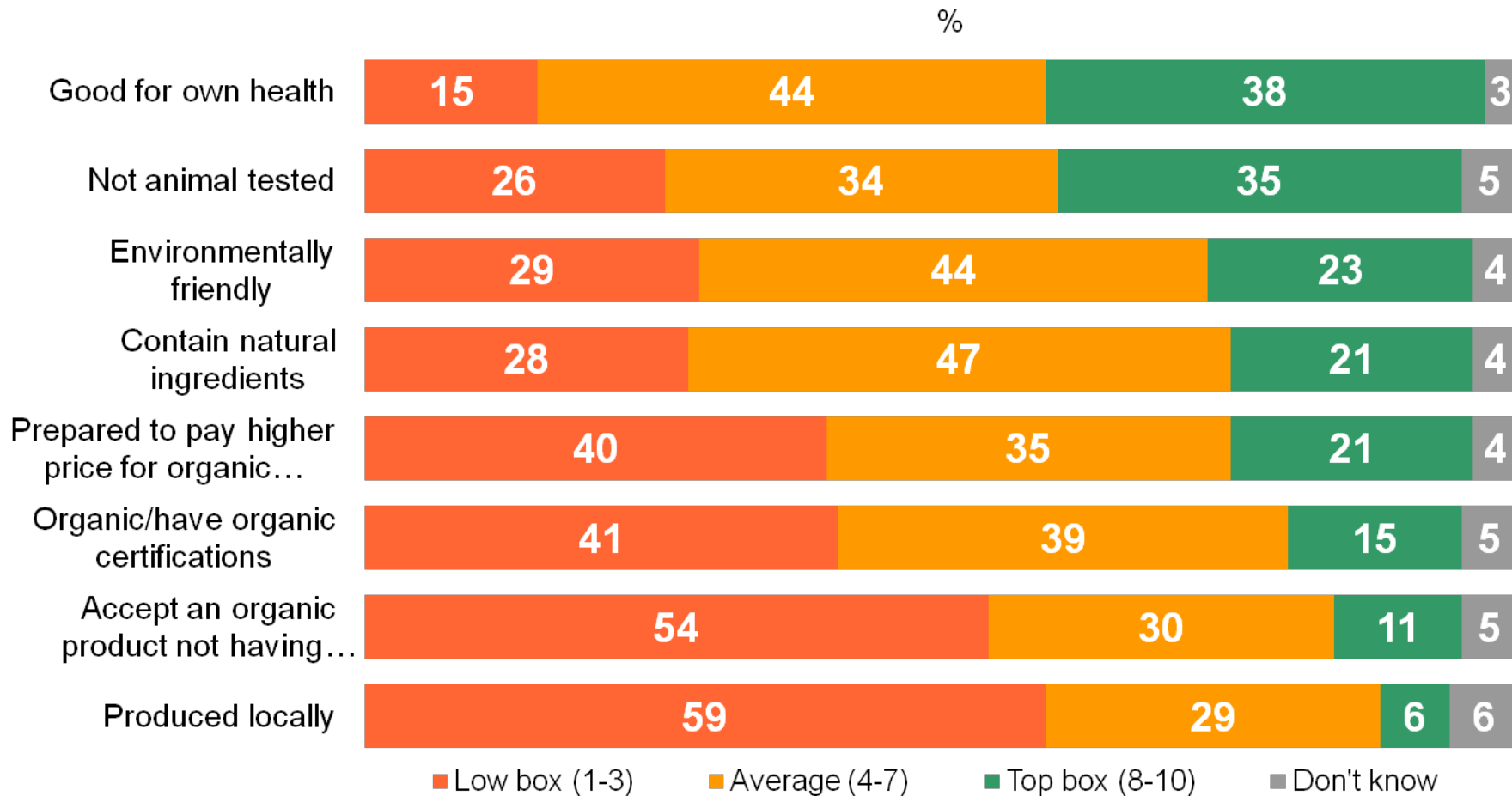




# Important/true when choosing shampoo/conditioner



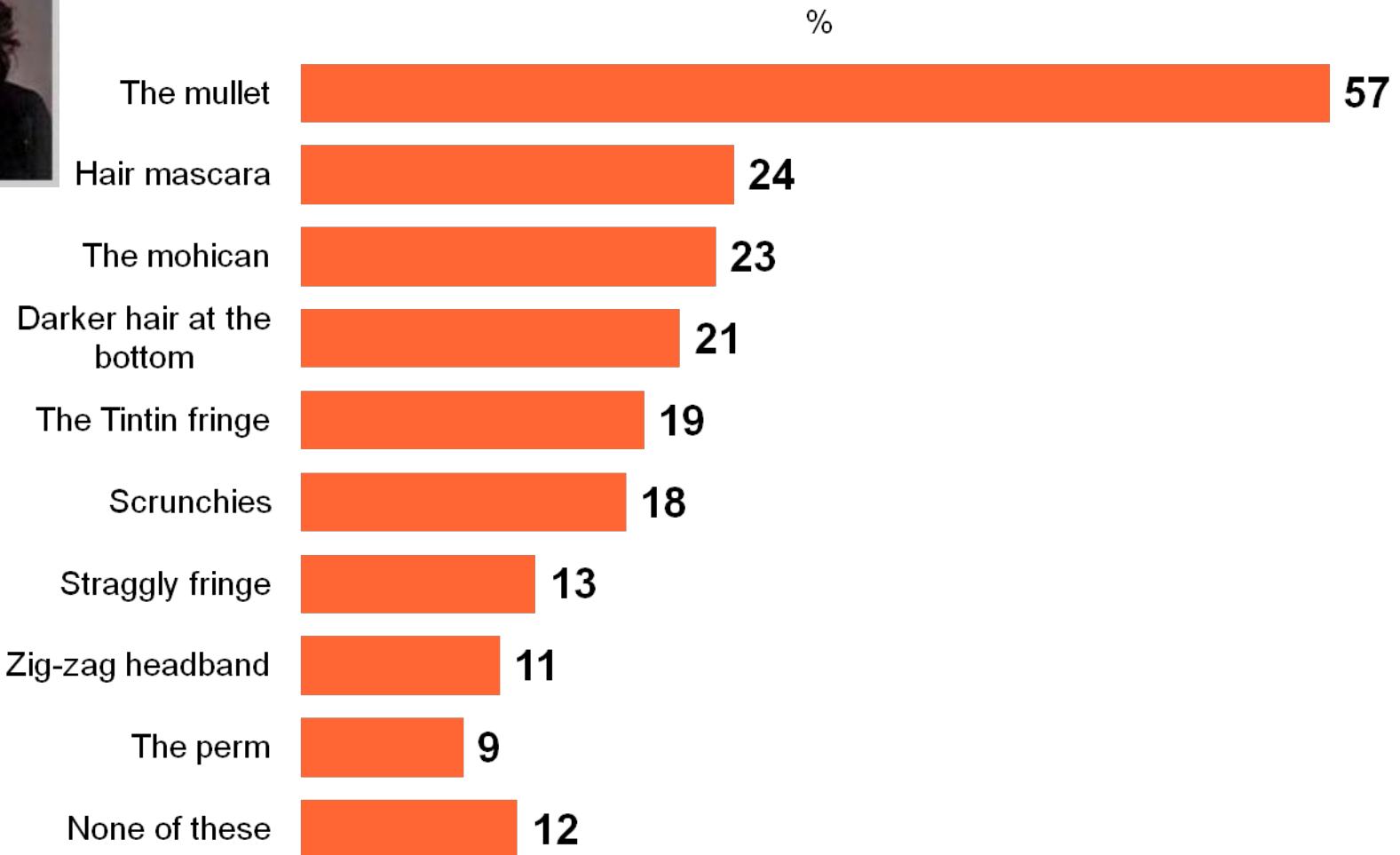
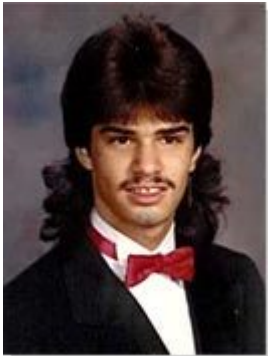
Organic and environmentally friendly products less important to younger women



# Swedish results

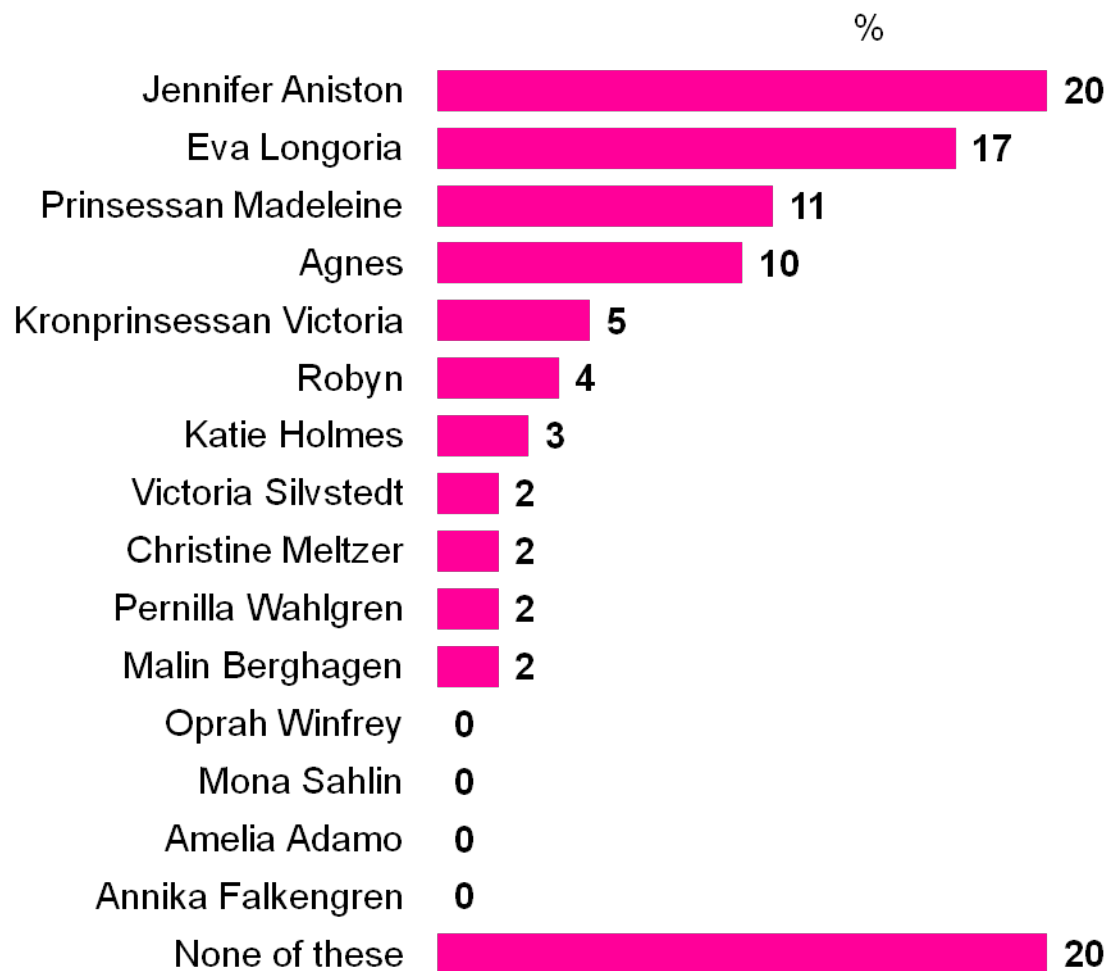
5) Attitudes to hair styles and a gender perspective on hair

# Trends would never want to see again



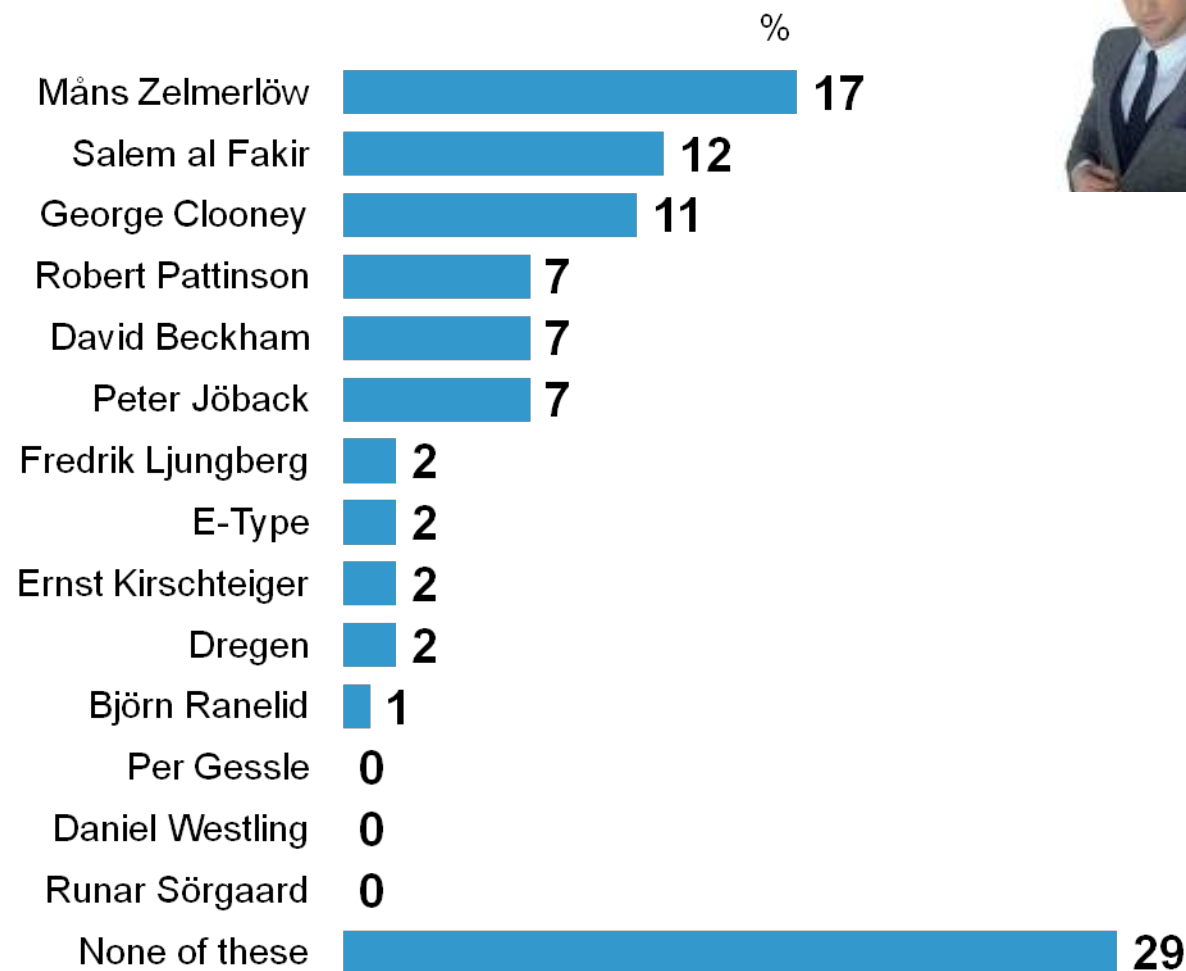
# Female celebrity with best-looking hair

Eva Longoria most popular among younger women



# Male celebrity with best-looking hair

Robert Pattinson 2<sup>nd</sup> most favourite among younger women



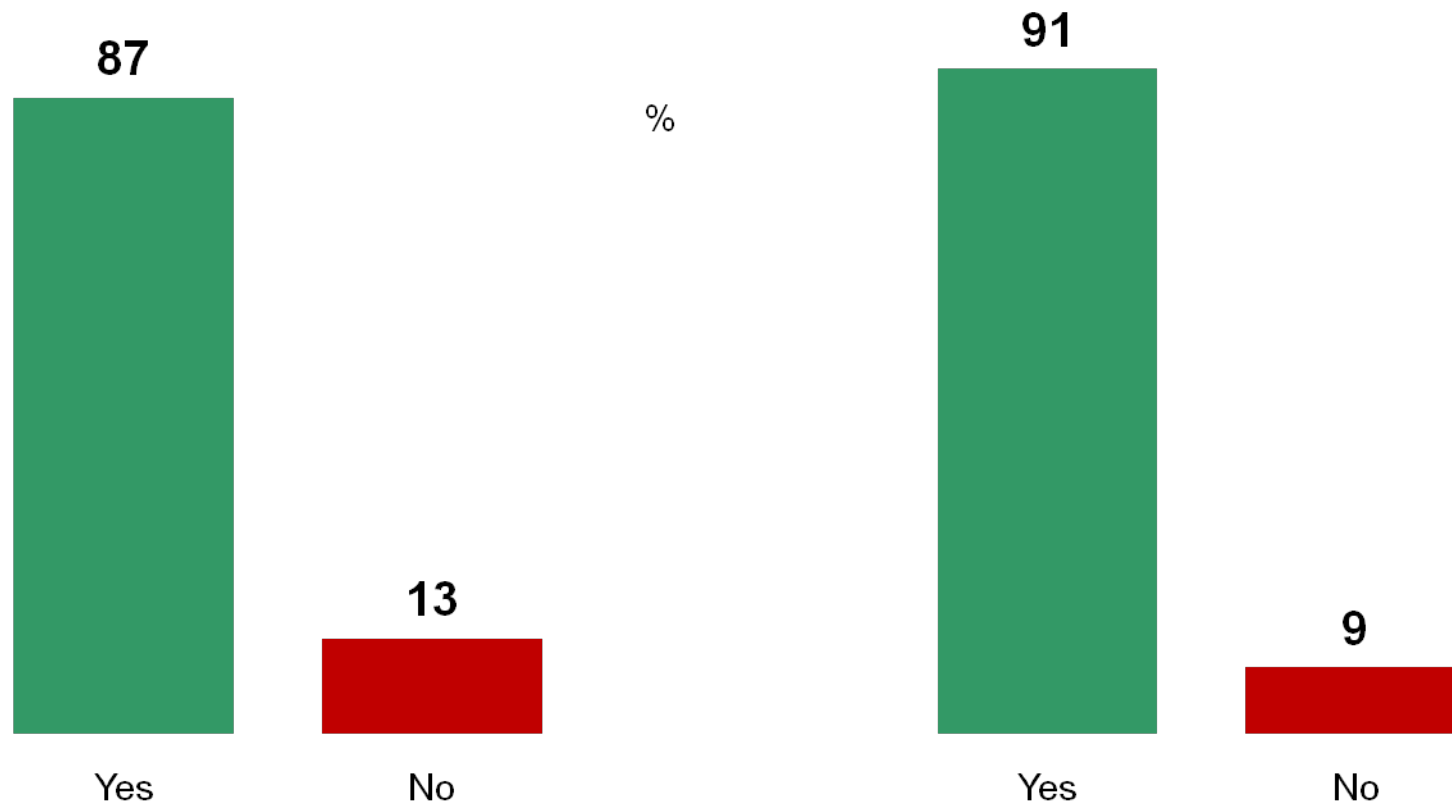
# Beautiful without beautiful hair?



## Women vs. men

Can a **woman** be beautiful without having beautiful hair?

Can a **man** be beautiful without having beautiful hair?



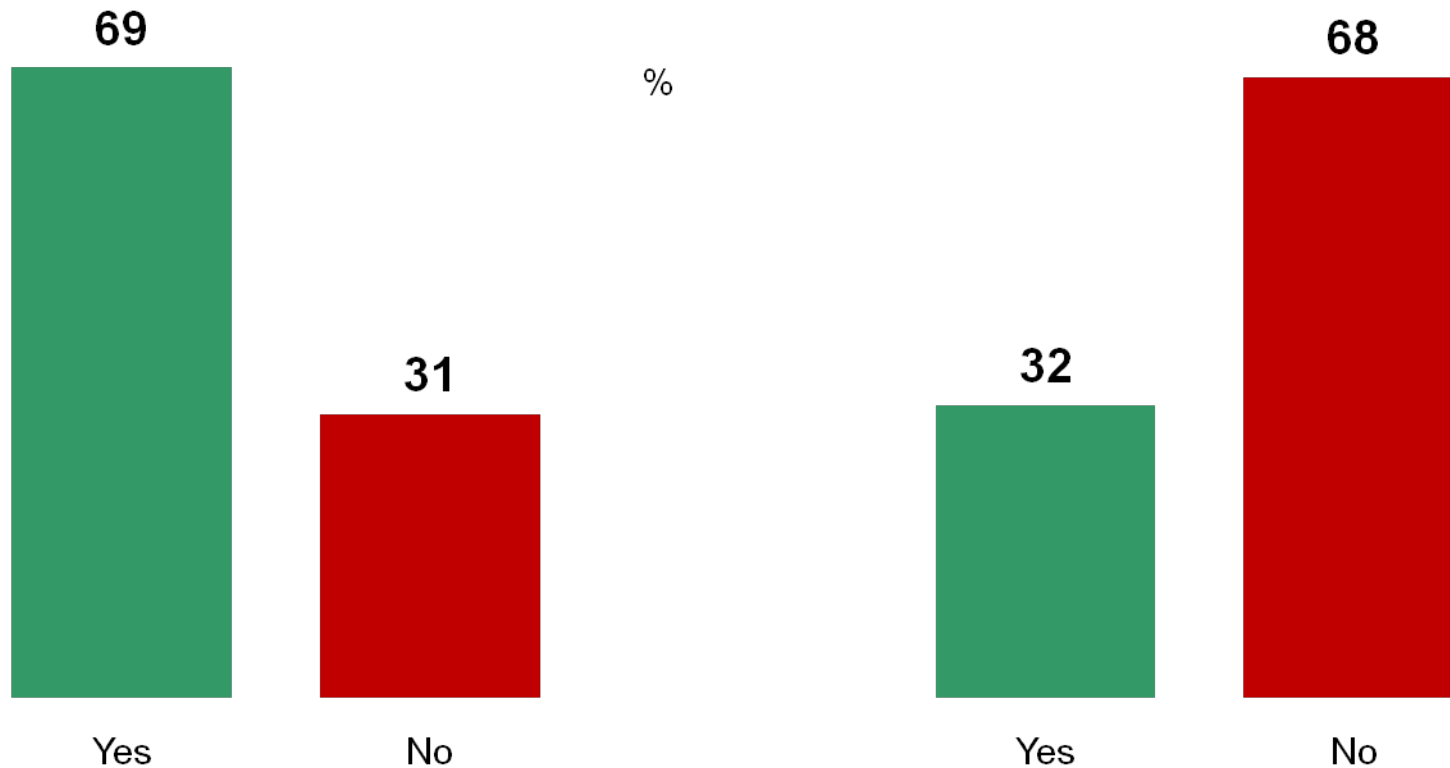
# Judged according to her/his hair?



## Women vs. men

Is a **woman** judged by others according to whether she has beautiful hair?

Is a **man** judged by others according to whether he has beautiful hair?

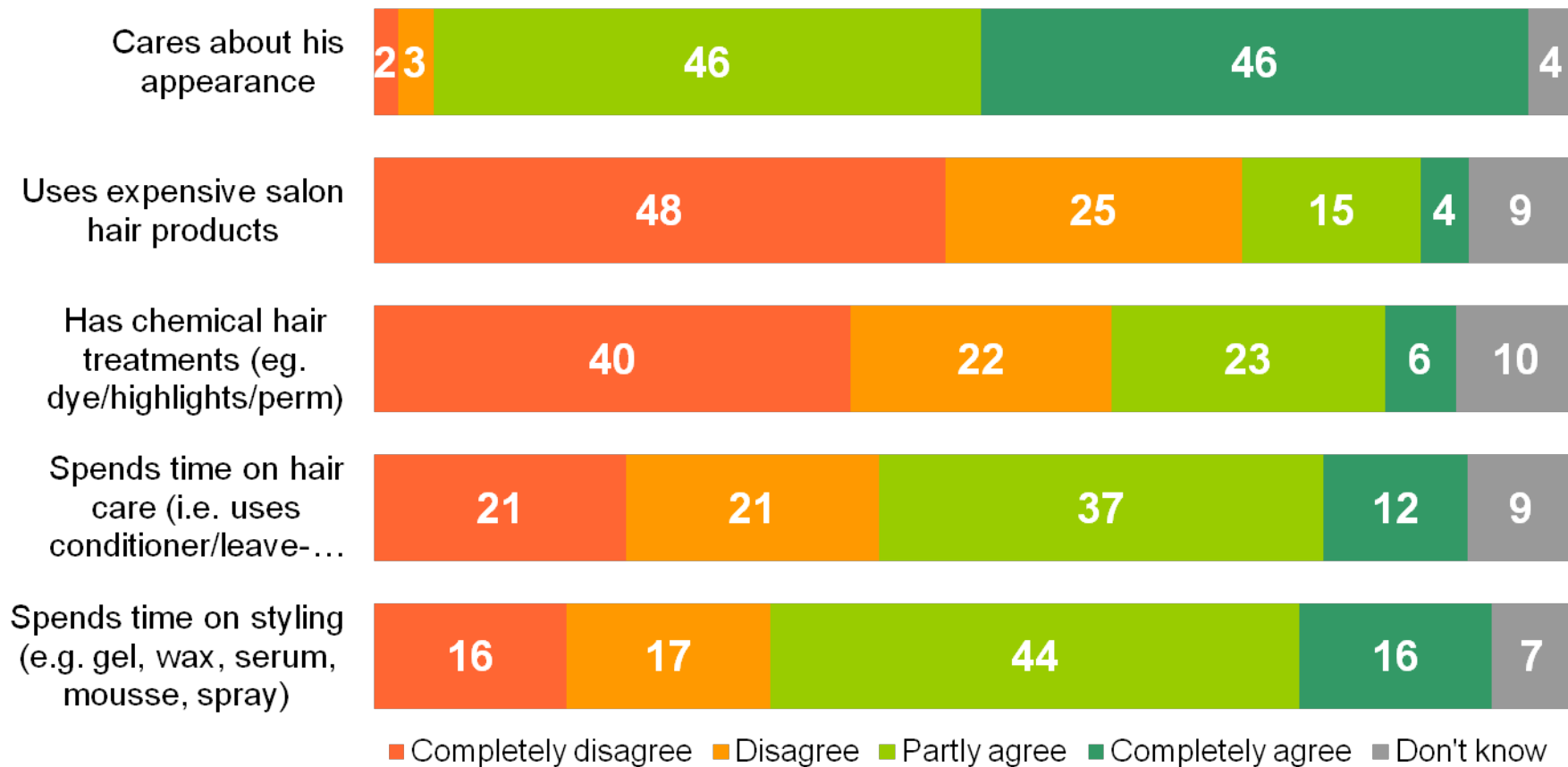


# Attitudes towards men's hair behaviour



I think it is a positive thing that a man...

It is accepted for a man to spend time, but not money, on his appearance

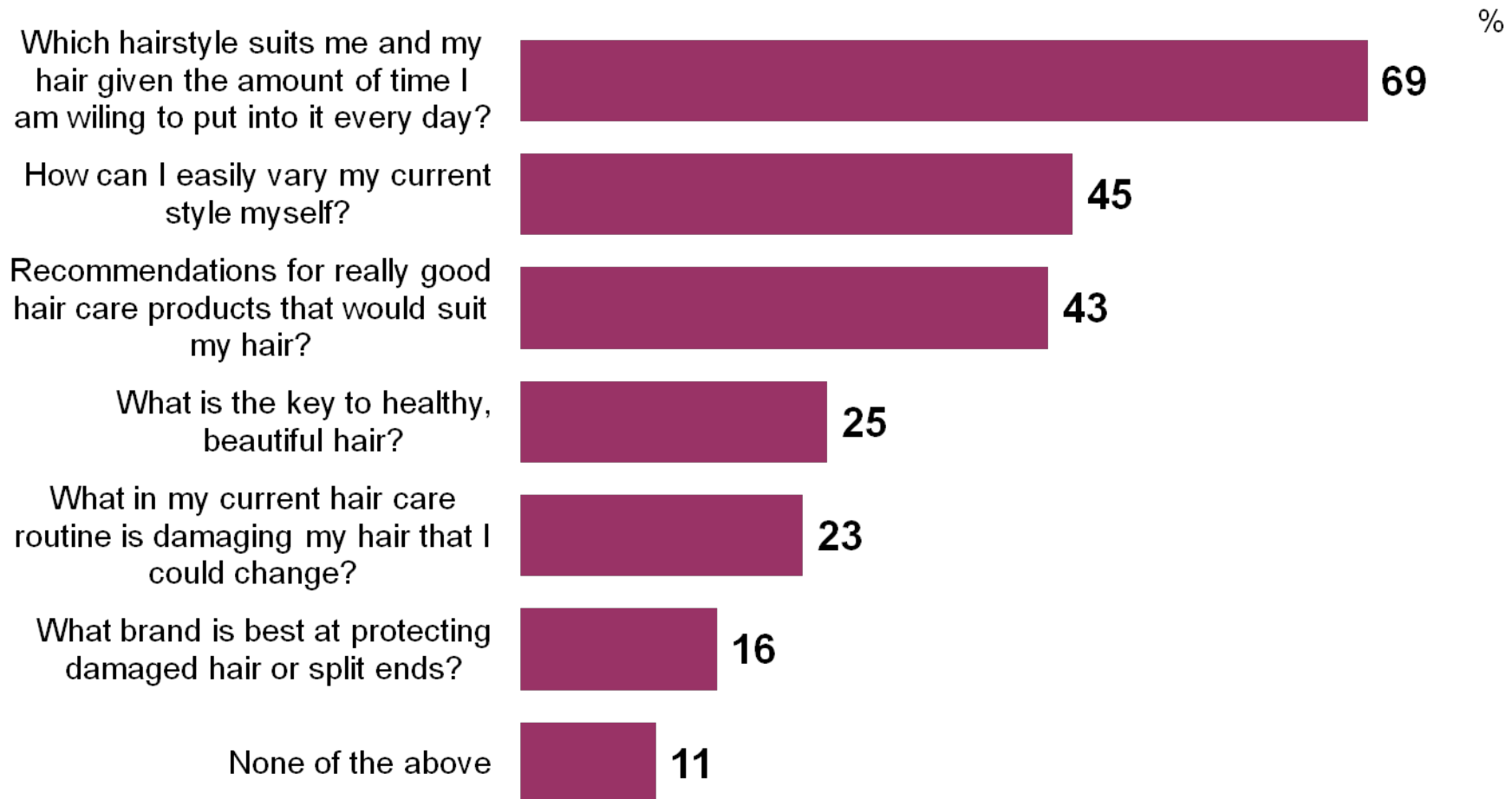




# If I could, this is what I'd ask a hair care expert



Younger women more interested in suggestions about which **brand** is best at protecting damaged hair/split ends



# Key findings - Sweden



# Key findings



## Hair routines and hair care

- 75% of the women in the Swedish study have **long hair** and one third describe their haircut as "classic". They are in general happy with their hair and the vast majority of women all ages think they have **beautiful** hair
  - They look after their hair by regularly going to the hairdresser and **using good hair products** (approx 4 in 10). One fourth avoid heat styling and brush their wet hair as carefully as possible
  - In case of a bad hair day most women put their hair up, which connects to the majority of long hair
- Feeling healthy and happy are considered most important to the own self esteem. Third most important factor is a great-looking hair, especially among young women, aged 16-20
- On average, women wash their hair 2,9 times a week, and in an average day 6 in 10 spend **less than 5 minutes** on fixing their hair
  - Young women **spend more time** on their hair, 20% answer that they on average spend up to 20 or up to 30 minutes a day
- The average **monthly spending** on hair care products amount to approx. **83 SEK**
  - Among the 16-20 year olds 3 in 10 state that they don't purchase these products themselves
- A nice fragrance and **recommendations** from hairdresser or **hair expert** are key factors when purchasing shampoo and conditioner. Apart from suggestion from hairdresser, **special offers** are key to make women **try new** hair care products. **Sampling** is also important, especially among young women.

# Key findings

## Damaged hair



- Although the vast majority think they have beautiful hair and only 7% would primarily define their hair as damaged, **30% state that their hair is damaged**, and among young women - aged 16-20 - it's 39%
- Approx. half of the women have experienced **split ends** during the past 12 months, especially young women. Women aged 41-50 have the healthiest hair, with 1 in 4 not having experienced any of the specified hair problems
- Most women believe that **chemical treatments**, such as bleaching and perm, as well as using styling tools will do a great deal of damage to their hair. Awareness about to what extent **air pollution or cold weather** damage the hair however is low
  - Surprisingly, 1 in 2 does not feel the need to learn more about how hair routines can damage their hair
- 50% actively try to **avoid damaged hair** – and over half of them **buy shampoo/conditioner** that will tackle the problem. Close to one third purchase the products in the **supermarket**
- Most women would **ask the hair expert for which hairstyle** that suits their hair, given the time they are willing to put into it everyday. Women aged 16-20 to a greater extent than others are interested in which **brands** best protect the hair from damage/split ends

# Key findings



## Dream hair and a gender perspective on hair care

- Female celebrities **Jennifer Aniston** (20%) and **Eva Longoria** (17%) are at the top of the list of women with the best-looking hair
- The male equivalent list is dominated by **Måns Zelmerlöw** (17%) and, among the young women **Robert Pattinson** is considered having the 2<sup>nd</sup> best-looking hair
- The most detested hair trend is “**the mullet**”, almost 6 in 10 women never want to see this haircut again. The mullet is followed by trends such as hair mascara and the Mohican
- To a large extent women think that **both men and women can be beautiful** despite not having beautiful hair, although the acceptance is slightly higher with men (91% vs 87%)
  - Nevertheless, women are perceived to be **judged by others** according to whether or not she has beautiful hair **to a considerably greater extent** than men (69% vs 32%)
- It is absolutely **ok for a man** to care about his **appearance** and to spend time on **hair styling**. However, interestingly enough it does **not** seem to be ok for him to spend money on this by using expensive salon products

# Contact



Petra Laru, [petra.laru@tns-sifo.se](mailto:petra.laru@tns-sifo.se)

Tel: 08-5074 2185

Laura Westerdahl, [laura.westerdahl@tns-sifo.se](mailto:laura.westerdahl@tns-sifo.se)

Tel: 08-5074 2071

[www.tns-sifo.se](http://www.tns-sifo.se)







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