



Hair Care Study

Findings from a National Study

Submitted to

PIRANA

by



World Leaders in Marketing Research & Consultancy

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Background to Pakistani Consumer Market



Background to Pakistani Consumer Market

Consumption Habits in Pakistan

This section explains the manner in which Pakistani consumers generally spend their Income. Of special importance is the head of Personal Care.

This section suggests that the total market for Personal Care related item including Laundry is around 4% of all Household Expenditure in the country

This constitutes around 101 Billion Rs of Annual Personal Care market.

Household Expenditure

According to the Household Integrated Economic Survey (HIES), Household Expenditure refers to all money expenditure by the household and individual members on goods intended for consumption and expenses on services.

	Rupees				
	1994	1997	2002	2005	2006
All Pakistan	3,829	5,177	6,174	9,121	10,583
Rural	3,232	4,504	5,766	7,712	8,945
Urban	5,315	6,757	8,997	12,079	13,997

Source: Household Integrated Economic Survey 2006



Breakdown of Expenditure Groups

FOOD

43% of total household expenditure is spent on food (*further distribution is shown later*)

PERSONAL CARE

4% of total household expenditure is spent on Laundry and personal care (*further distribution is shown later*)

CLOTHING AND FOOTWEAR

6% of household expenditure is spent on clothing and footwear, (*further distribution is shown later*)

HOUSING

15% of total household Expenditure is spent on Housing (*further distribution is shown later*)

OTHER

27% of household expenditure is spent on utilities, education, entertainment and other miscellaneous items

COMMUNICATIONS

6% of total household Expenditure is Spent on Communication distribution is shown later)



Breakdown of Household Expenditure in Pakistan

The total consumption expenditure or **the size of Consumer Wallet** in the country is estimated to be around 2,830 billion Rupees a year.

Consumption Expenditures

Total Consumption Expenditure	2,830 Billion Rs. a year
Urban	1,254 Billion Rs. a year
Rural	1,580 Billion Rs. a year

Source: Pakistan Social and Living standards Measurement Survey 2006

The distribution of this (*the so called Share of Wallet*) is as below:

Share of Wallet is the percentage of a customer's expenses that is spent on particular category of products or services.

Share of Wallet (All Pakistan)

	Breakdown of Expenditure	
	Percent of expenditure*	Value* (Rupees)
Food, beverage and tobacco	43%	1,218,000,000,000
Apparel, textile and foot ware	6%	162,000,000,000
Transport and communication	6%	175,000,000,000
Cleaning, laundry and personal appearance	4%	101,000,000,000
Recreation and Entertainment	1%	18,000,000,000
Education	4%	104,000,000,000
Rent	15%	430,000,000,000
Fuel and Lighting	8%	225,000,000,000
Miscellaneous	14%	397,000,000,000
Total	101%	2,830,000,000,000

Source: Household Integrated Economic Survey 2006

* Figures add up to 101 because of rounding off

** Values have been calculated from actual (not rounded) percentages and then have been rounded off. This is only to make it more reader friendly without causing major deviations.



Section 1:

**Different Types of Products used
for Hair Care?**



Section 1:

Different Types of Products used for Hair Care?**Question:** What do you use to take care of your Hair?

Products (Modern and Traditional)	Yes	No	No Response
Oil	86%	15%	2%
Soap	72%	26%	2%
Shampoo	71%	29%	-
Henna	40%	57%	3%
Egg	20%	78%	2%
Gel	3%	96%	1%
Yogurt	16%	80%	3%
Hair Colouring Product (other than Hina)	7%	92%	1%
Herbs	15%	83%	3%

Source: Gallup Pakistan Hair Care Study 2009

* See Methodology for more detail



Section 2:

Brand Recall



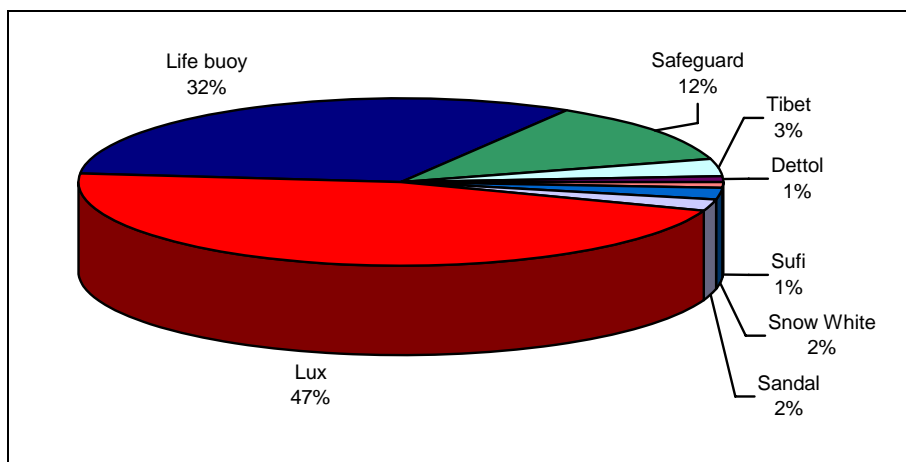
Section 2.1:

Brand Recall (Soap)

Question: When you listen to the name “Soap” which brand comes to your mind first? [Asked from those who use soap for care of hair]

Lux	42%
Life Buoy	29%
Safeguard	11%
Tibet	3%
Capri	3%
Dettol	1%
Imperial Leather	1%
Sufi	1%
Snow White	2%
Sandal	2%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



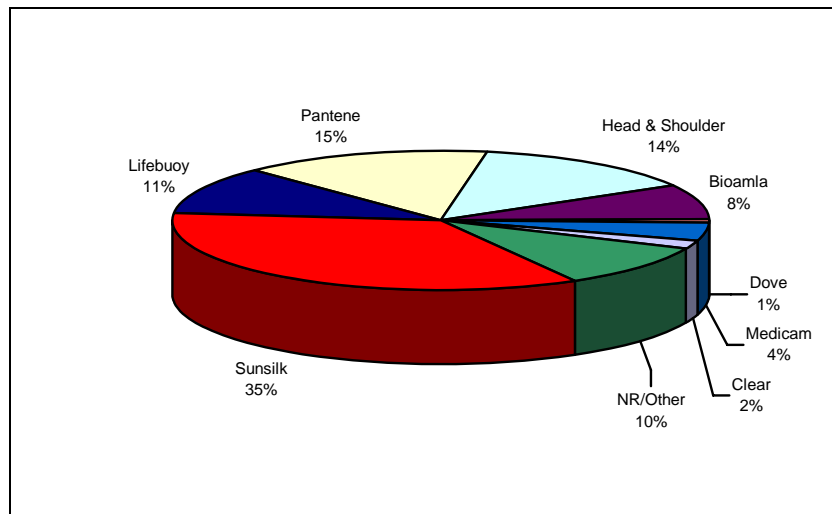
Section 2.2:

Brand Recall (Shampoo)

Question: When you listen to the name “Shampoo” which brand comes to your mind first?

Sunsilk	35%
Lifebuoy	11%
Pantene	15%
Head and Shoulder	14%
Bioamla	8%
Dove	1%
Medicam	4%
Clear	2%
No Response/Others	10%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



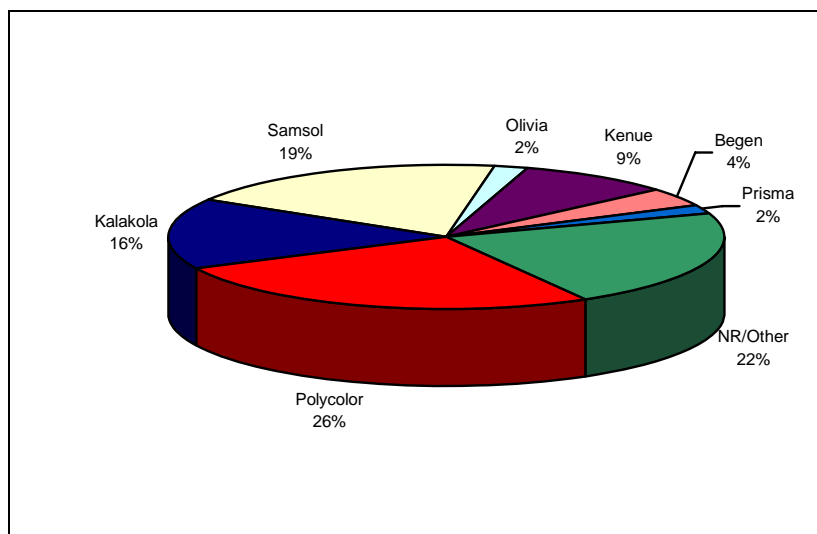
Section 2.3:

Brand Recall (Hair Colouring Products)

Question: When you listen to the name “Hair Colouring” which brand comes to your mind First?

Polycolor	26%
Kalakola	16%
Samsol	19%
Olivia	2%
Keune	9%
Begen	4%
Prisma	2%
No Response/Others	22%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



Section 3:

Ad Recall



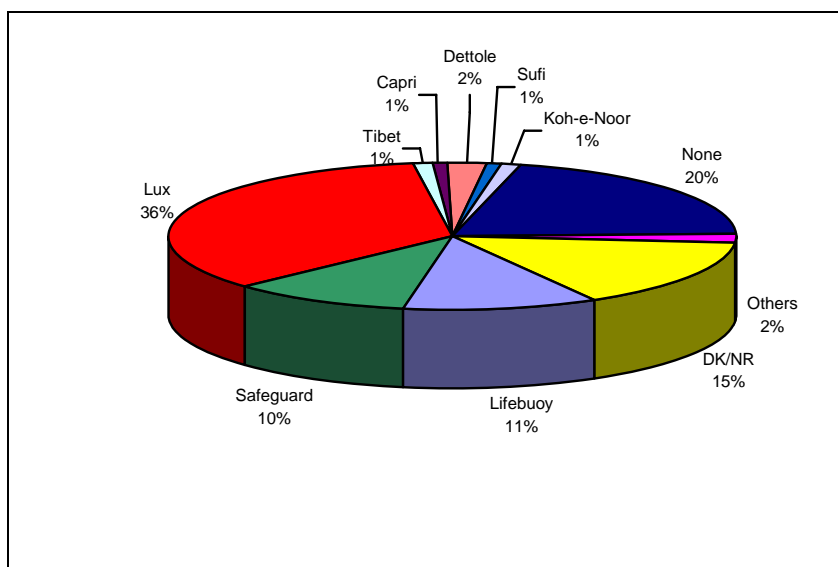
Section 3.1:

Ad Recall (Soap)

Question: During last week can you recall one “Soap” advertisement on TV or Newspaper or Billsboard that you remember the most?

Lifebuoy	11%
Safeguard	10%
Lux	34%
Tibet	1%
Capri	1%
Dettole	2%
Sufi	1%
Koh-e-Noor	1%
None	20%
Othrs	2%
Don't Know/No Response	15%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



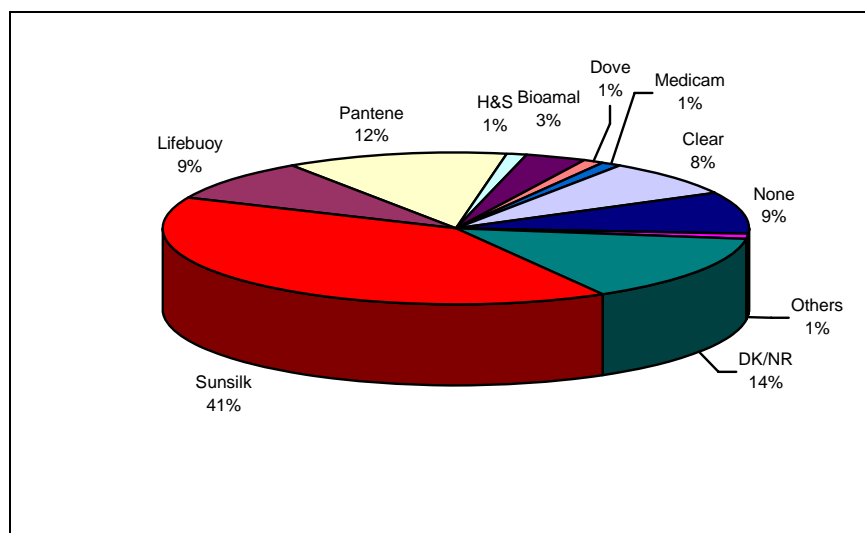
Section 3.2:

Ad Recall (Shampoo)

Question: During last week can you recall one “Shampoo” advertisement on TV or Newspaper or Billsboard that you remember the most?

Sunsilk	36%
Lifebuoy	8%
Pantene	11%
Head & Shoulder	1%
Bioamla	3%
Dove	1%
Medican	1%
Clear	7%
None	8%
Others	1
Don't Know/No Response	13%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



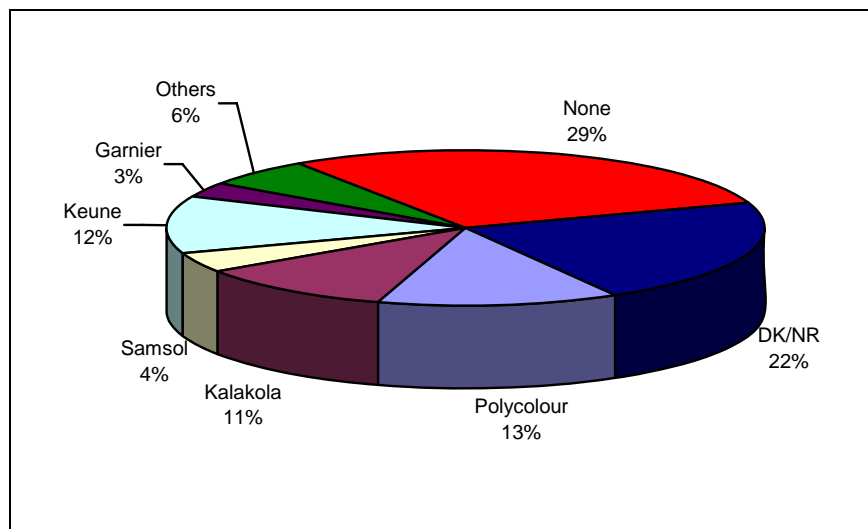
Section 3.3:

Ad Recall (Hair Colouring Products)

Question: During last week can you recall one “Hair Colouring Products” advertisement on TV or Newspaper or Billboard that you remember the most?

Polycolour	13%
Kalakola	11%
Samsol	4%
Keune	12%
Garnier	3%
Others	6%
None	29%
Don't Know/No Response	22%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



Section 4:

Usage of different Brands



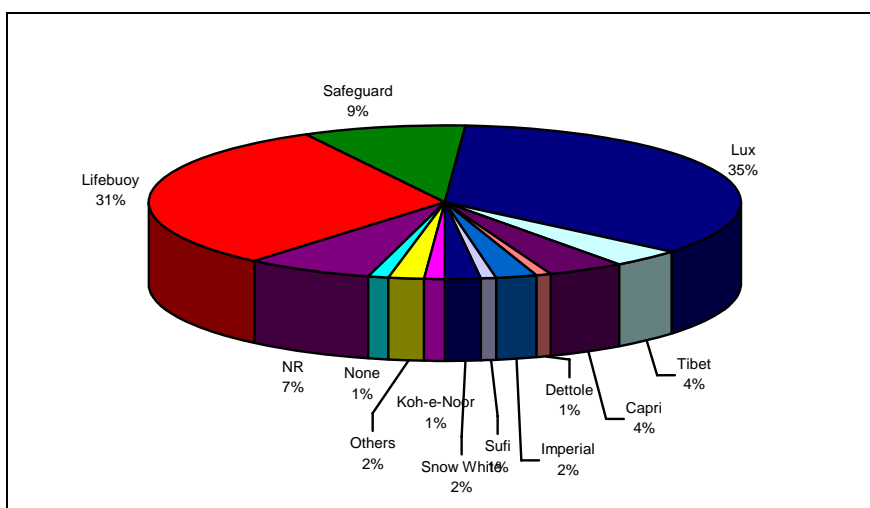
Section 4.1:

Usage of Different Brands (Soap)

Question: Which “Soap” brand do you use the most?

Lifebuoy	31%
Safeguard	9%
Lux	35%
Tibet	4%
Capri	4%
Dettol	1%
Imperial	2%
Sufi	1%
Snow White	2%
Koh-e-Noor	1%
Others	2%
None	1%
Don't Know/No Response	7%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



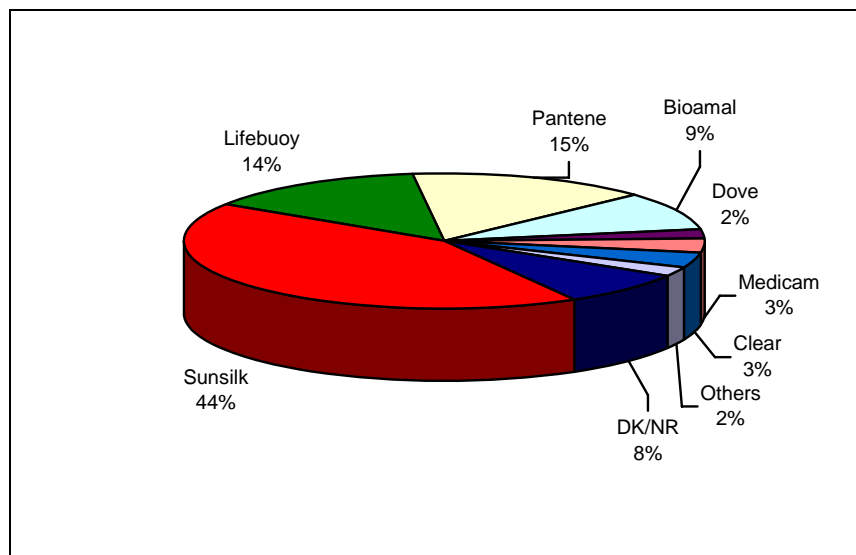
Section 4.2:

Usage of Different Brands (Shampoo)

Question: Which “Shampoo” brand do you use the most?

Sunsilk	37%
Lifebuoy	12%
Pantene	13%
Bioamla	8%
Dove	2%
Medican	3%
Clear	3%
Others	2%
Don't Know/No Response	7%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



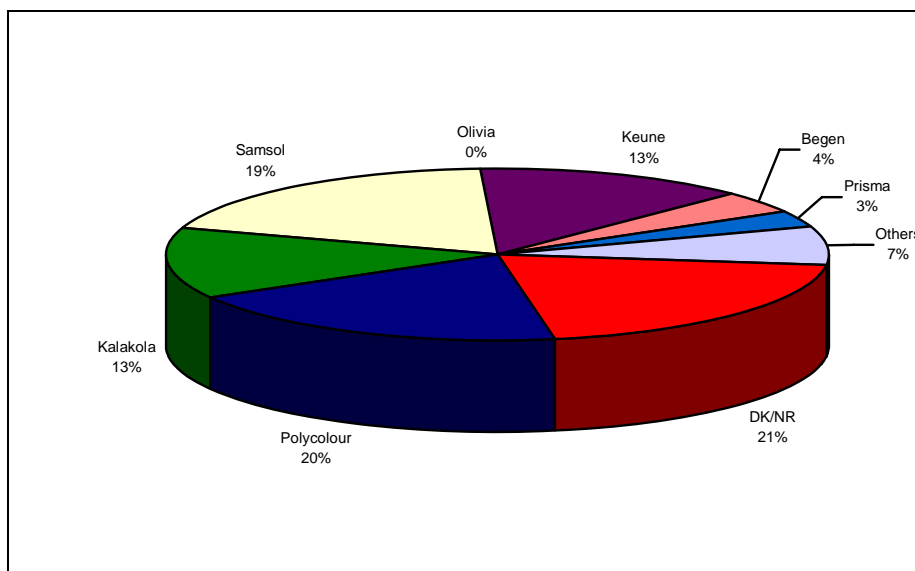
Section 4.3:

Usage of Different Brands (Hair Colouring Products)

Question: Which “Hair Colouring Products” brand do you use the most?

Polycolour	19%
Kalakola	13%
Samsol	19%
Olivia	2%
Keune	13%
Begen	4%
Prisma	3%
Others	7%
Don't Know/No Response	20%

Source: Gallup Pakistan National Study 2010



* See Methodology for more detail



Methodology



Methodology

Sample Profile:

Total Sample:

This survey was based on responses from 2250 men and women.

Except for Section 1 where the data is from 2750 men and women

Geographical Coverage:

The survey covered all four provinces of Pakistan. The sample was spread in both Rural and Urban areas. Within Urban areas Metros, Large and Medium Towns were also covered.

Methodology:

Face to face in home methodology was used

Quality Standards:

Gallup Pakistan complies with ESOMAR (European Society for Marketing and Opinion Research) standards for research.

Note on Analysis:

This analysis is preliminary and explanations presented here are possible reasons/consequences. The data is statistically valid but analysis is based on subjective views of the writer.

Field Work Dates:

2009-2010



Appendix 1:

Tips on Media Habits of Pakistanis



Tips on Pakistani Media

Source: Gallup Pakistan Report 2009

Changing Media Market:

The media market in Pakistan has changed quite significantly during the last fifteen years. The new media scene is characterized by the emergence of Satellite TV, FM Radio, Internet and the low priced regional and local newspapers.

The following write-up analyzes the penetration levels of these new media and the emerging media horizon in the country. In summary the current situation is the following:

Satellite TV: Satellite TV is available to nearly half of all TV viewers in the country. It is accessed mainly through cable operators. The availability is considerably higher in urban areas as compared to the rural. In urban areas nearly 80% of TV viewers have access to it whereas the comparable rural figure is around 25%. Access to satellite TV has broadened the media choices. Consequently the multi-channel audience now watches private **national** channels as well as several **regional** and **local** channels for news, current affairs and entertainment programs.

The Viewership of public and semi-public TV (PTV, PTV World and ATV) faces severe competition from private channels in areas where Satellite TV is available. Most significantly the Viewership of PTV news (Khabarnama) drops to nearly half when satellite TV moves into a home, from nearly 30% to around 15%.

FM Radio: FM Radio began with one channel (FM100) in only three cities (Karachi, Lahore, Rawalpindi /Islamabad). But it has now vastly expanded in number and is extending its geographical range across the country. More than a hundred FM radio channels have obtained licenses and a significant number of them are currently broadcasting.

Presently nearly all (97%) radio listeners listen to FM channels as well. The most popular is Mast FM 103. The other channels have a specific regional and local transmission.



The availability of private radio channels with local and regional faces is likely to make significant impact in the future. What would that impact be? It is still in the making.

Internet*: According to the latest Gallup Pakistan Report nearly 2% of Pakistanis over the age of 18 now claim to be using internet regularly or casually. So far it is a low figure at a gross level but it is already quite in some sections of the population. For example it is around 12% in Karachi and 9% in Norethern Punjab (mostly Islamabad/Rawalpindi). Further diffusion of internet is likely to make a strong impact on media scene in the country.

It appears that internet usage did not rise in 2008 partly because of massive shortages and failures of electricity supply, commonly referred to as load-shedding. Thus, while computer viewership has risen to 11%, internet access has not grown at the same pace.

Regional low Price Newspapers: The low price newspapers, available either in the morning or mid-day / afternoon have considerably influenced the newspapers readership in the country.

Their impact is particularly pronounced in regional markets such as Interior Sindh and NWFP. For example four Sindhi language newspapers dominate the newspaper readership in Interior Sindh: “Kawish” “Koshish” and “Khabroon”. Their combined readership is far ahead of Urdu and English readership. In NWFP “Daily Express” is at the top of the readership ladder. In Karachi low price evening “Awam” and “Qaumi Akhbar” and a medium priced paper “Ummat” have very significant share in newspaper readership. In Balochistan the local “Mashriq” capture a large portion of total readership. Interesting however is the fact that except for Interior Sindh, all the local papers, irrespective of the language of that province are published in Urdu.

In summary the media scene in Pakistan has far more choices than was the case fifteen years ago. The emergence of Satellite TV, FM Radio, Internet and regional newspapers has introduced an element of greater variety in terms of ownership and control of media which is now not restricted to the public sector as well as greater possibility of focusing on regional and local concerns. These developments bear in them both positive and negative potentialities. It is yet to be seen as to how these potentialities are harnessed.



Settings in Which People Watch Television

Roughly 80% of Pakistanis today watch television in the urban and rural areas of the country. Almost half of them have access to cable television.

Where is Television Located?

Living Rooms followed by Bed Rooms are the most common locations to place the family television. This description comes with the caution that in a situation of crowded housing and tiny houses for ordinary Pakistanis, the distinction between various types of rooms is only mildly relevant.

“Usually in which room do you sit and watch television; meaning in which room of your house is the television placed?”

Living Room	59%
Bed Room	21%
Drawing Room	15%
Other	5%

Source: Gilani Poll conducted by Gallup Pakistan

the Pakistani affiliate of Gallup International Association (www.gallup-international.com; www.gallup.com.pk)

The Company You Keep When Watching Television

Despite a trend towards availability of greater choice among types of television channels (genre) targeted at different members of the household (men, women, and children) of varying ages, television viewing continues to be a group viewing activity. Or at least that is how most of the viewing is done. Most viewers claim they view TV in the company of the family. This is partly a result of crowded housing in which nearly two thirds of all households live in a home of two or fewer rooms.

“Do you usually watch television with your family or somewhere else?” (asked of TV viewers)

With Family	84%
Somewhere Else	16%

Source: Gilani Poll conducted by Gallup Pakistan

the Pakistani affiliate of Gallup International Association (www.gallup-international.com; www.gallup.com.pk)

Views on Quality of Programs on Television

Notwithstanding many skeptics, who may even be correct, the average viewer believes that the quality of programs on television is improving.



“In your view, during the last few years has the standard of television programs improved, deteriorated, or remained the same?”

Improved	42%
Remained Same	29%
Deteriorated	27%
No Response	2%

Source: Gilani Poll conducted by Gallup Pakistan

the Pakistani affiliate of Gallup International Association (www.gallup-international.com; www.gallup.com.pk)



Summary of Media Habits

These are All Pakistan findings (Age 10+).
For Rural and Urban breakdowns see Gallup Media Reports 2009

Television Viewership: (Base Age 10+)

Total Viewership	78%
Among Age 10+	
Regular	50%
Occasional	16%
Casual	2%

Satellite Viewership	35%
Among Age 10+	
OR 45% of TV Viewers	

Radio Listenership: (Base: Age 10+)

Total	27%
Among Age 10+	
Regular	13%
Occasional	10%
Casual	4%

New Media Access Level: (Base: Age 10+)

Personal Mobile Phone	30%
Computer	11%
Internet	2%



Appendix 2:

Tabular Data



Section 1:

**Different Types of Products used
for Hair Care?**



Table 1a
Q1 What do you use to take care of your hair?

		Shampoo		
		Yes	No	No Response
		Row%	Row%	Row%
Total		71	29	0
GENDER	Male	67	33	0
	Female	75	25	0
Total		71	29	0
Age of the Respondent	Under 30	74	25	1
	30 – 50	68	32	0
	51+	67	33	0
	No Response	40	60	0
Total		71	29	0
Education	No education/ only basic education	63	37	1
	Secondary school	74	25	0
	High level education (e.g university)	84	16	1
	No response	59	41	0
Total		71	29	0
Location	Rural	64	35	0
	Urban	84	16	0

Weighted
SOURCE : Gallup Pakistan March 15-16 , 2009

Table 1b
Q1 What do you use to take care of your hair?

		Soap		
		Yes	No	No Response
		Row%	Row%	Row%
Total		72	26	2
GENDER	Male	78	20	2
	Female	65	32	3
Total		72	26	2
Age of the Respondent	Under 30	70	27	3
	30 – 50	73	26	2
	51+	78	17	5
	No Response	64	36	0
Total		72	26	2
Education	No education/ only basic education	80	17	2
	Secondary school	69	28	3
	High level education (e.g university)	56	44	1
	No response	49	51	0
Total		72	26	2
Location	Rural	84	13	3
	Urban	48	51	1

Weighted
SOURCE : Gallup Pakistan March 15-16 , 2009



Table 1c
Q1 What do you use to take care of your hair?

		Oil		
		Yes	No	No Response
		Row%	Row%	Row%
Total		83	15	2
GENDER	Male	80	19	2
	Female	86	11	3
Total		83	15	2
Age of the Respondent	Under 30	84	14	3
	30 – 50	82	16	2
	51+	80	15	4
	No Response	91	9	0
Total		83	15	2
Education	No education/ only basic education	87	11	3
	Secondary school	82	16	2
	High level education (e.g university)	74	25	1
	No response	82	18	0
Total		83	15	2
Location	Rural	84	13	3
	Urban	81	18	1

Weighted
SOURCE : Gallup Pakistan March 15-16 , 2009

Table 1d
Q1 What do you use to take care of your hair?

		Mehandi		
		Yes	No	No Response
		Row%	Row%	Row%
Total		40	57	3
GENDER	Male	33	64	3
	Female	47	50	3
Total		40	57	3
Age of the Respondent	Under 30	37	60	3
	30 – 50	42	55	3
	51+	44	51	4
	No Response	20	80	0
Total		40	57	3
Education	No education/ only basic education	44	52	3
	Secondary school	36	61	3
	High level education (e.g university)	37	61	2
	No response	30	70	0
Total		40	57	3
Location	Rural	39	57	4
	Urban	41	58	1

Weighted
SOURCE :Tvs 2910 Gallup Pakistan March 15-16 , 2009



Table 1e
Q1 What do you use to take care of your hair?

		Herbs		
		Yes	No	No Response
		Row%	Row%	Row%
Total		15	83	3
GENDER	Male	12	85	3
	Female	18	80	3
Total		15	83	3
Age of the Respondent	Under 30	17	81	3
	30 – 50	12	85	2
	51+	14	78	8
	No Response	14	86	0
Total		15	83	3
Education	No education/ only basic education	15	83	2
	Secondary school	15	82	3
	High level education (e.g university)	14	84	3
	No response	20	80	0
Total		15	83	3
Location	Rural	15	81	4
	Urban	13	86	1

Weighted
SOURCE : Gallup Pakistan March 15-16 , 2009

Table 1f
Q1 What do you use to take care of your hair?

		Yogurt		
		Yes	No	No Response
		Row%	Row%	Row%
Total		16	80	3
GENDER	Male	11	85	4
	Female	22	75	3
Total		16	80	3
Age of the Respondent	Under 30	18	79	3
	30 – 50	15	82	3
	51+	14	78	8
	No Response	20	80	0
Total		16	80	3
Education	No education/ only basic education	16	81	3
	Secondary school	16	80	4
	High level education (e.g university)	18	79	3
	No response	25	75	0
Total		16	80	3
Location	Rural	16	80	4
	Urban	18	80	2

Weighted
SOURCE : Gallup Pakistan March 15-16 , 2009



Table 1g
Q1 What do you use to take care of your hair?

		Egg		
		Yes	No	No Response
		Row%	Row%	Row%
Total		20	78	2
GENDER	Male	15	83	2
	Female	24	73	3
Total		20	78	2
Age of the Respondent	Under 30	21	76	3
	30 – 50	19	80	2
	51+	18	78	4
	No Response	18	82	0
Total		20	78	2
Education	No education/ only basic education	20	78	2
	Secondary school	20	78	2
	High level education (e.g university)	19	78	3
	No response	27	73	0
Total		20	78	2
Location	Rural	20	78	3
	Urban	20	79	1

Weighted
SOURCE : Gallup Pakistan March 15-16 , 2009



Section 2:

Brand Recall



	When you listen to the name 'saop' what brand comes to your mind first?											
	Lifebuoy	Safe guard	Lux	Tibet	Capri	Dettol	Imperial	Sofi	Skin white	Sandal	Others	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	29	11	42	3	3	1	1	1	2	2	3	2
Male	28	12	41	4	5	1	1	0	3	0	2	3
Female	31	10	43	1	2	0	1	1	1	3	5	1
	29	11	42	3	3	1	1	1	2	2	3	2
Under 30	24	13	43	3	4	1	0	0	2	2	6	1
30 – 50	32	11	40	3	4	0	1	1	3	1	2	2
51+	30	4	49	4	1	1	0	1	0	0	1	9
No Response	35	23	27	0	0	0	0	0	0	0	15	0
	29	11	42	3	3	1	1	1	2	2	3	2
Illiterate	38	9	42	2	1	0	0	3	0	4	0	0
Literate but no formal Education	51	3	22	0	9	0	3	1	3	0	8	0
Upto Primary	22	9	51	8	1	0	3	0	0	4	3	0
Middle	32	10	42	3	5	0	2	0	2	2	1	1
Matric	21	13	44	4	5	1	0	0	5	0	5	3
Intermediate	21	17	44	2	2	1	0	0	0	0	6	8
Graduate	24	16	44	1	3	1	0	0	7	0	2	1
Post Graduate	36	20	29	2	3	3	1	0	1	0	3	2
Professional/Doctor	80	6	14	0	0	0	0	0	0	0	0	0
No Response	31	13	0	0	0	0	0	0	0	0	6	50
	29	11	42	3	3	1	1	1	2	2	3	2
Rural	33	10	43	2	3	0	1	1	3	2	2	1
Urban	19	17	38	5	6	2	1	1	0	0	7	4



	When you listen to the name 'Shampoo' what brand comes to your mind first?									
	Sunsilk	Life bouy	Pantene	Head & Shoulder	Bioamla	Dove	Medicam	Clear	Others	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	35	11	15	14	8	1	4	2	2	8
Male	30	11	17	15	6	0	4	3	1	13
Female	40	11	13	12	10	2	5	2	2	4
	35	11	15	14	8	1	4	2	2	8
Under 30	38	14	15	13	8	1	2	2	1	5
30 – 50	32	10	15	14	9	1	6	2	2	9
51+	44	3	12	15	1	2	0	0	2	20
No Response	38	27	13	21	0	0	0	0	0	0
	35	11	15	14	8	1	4	2	2	8
Illiterate	53	9	15	6	15	0	0	0	0	3
Literate but no formal Education	28	16	10	15	10	0	9	2	1	9
Upto Primary	34	22	10	9	19	0	4	0	0	1
Middle	36	7	14	12	12	1	8	2	2	6
Matric	37	11	14	14	3	1	5	2	2	12
Intermediate	30	13	16	16	4	2	0	4	3	11
Graduate	31	10	21	11	7	2	4	2	2	9
Post Graduate	32	2	17	35	4	2	0	2	4	2
Professional/Doctor	7	0	12	76	0	0	0	5	0	0
No Response	24	6	0	8	0	0	0	6	6	50
	35	11	15	14	8	1	4	2	2	8
Rural	36	12	12	12	10	0	7	0	0	11
Urban	34	10	19	15	6	2	0	5	4	4



	When you listen to the name 'Hair Colouring Product' what brand comes to your mind first?								
	Polycolor	Kalakolo	Samsol	Olivia	Keune	Bigen	Prisma	Others	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	26	16	19	2	9	4	2	5	17
Male	20	17	13	2	6	3	1	8	30
Female	31	15	23	2	11	6	2	4	7
	26	16	19	2	9	4	2	5	17
Under 30	38	16	1	0	3	0	2	9	29
30 – 50	24	16	24	2	11	6	2	4	11
51+	9	15	13	4	0	4	0	8	48
No Response	0	0	0	0	0	0	0	0	100
	26	16	19	2	9	4	2	5	17
Illiterate	0	0	35	0	62	3	0	0	0
Literate but no formal Education	82	4	5	5	0	0	0	5	0
Upto Primary	7	80	7	0	0	0	7	0	0
Middle	25	29	14	0	3	0	6	17	7
Matric	22	14	21	3	5	9	1	6	18
Intermediate	29	20	11	2	2	0	0	11	25
Graduate	21	15	14	2	7	5	3	1	31
Post Graduate	43	0	41	0	3	3	0	4	7
No Response	0	0	0	0	0	0	0	0	100
	26	16	19	2	9	4	2	5	17
Rural	25	9	21	0	10	5	0	0	30
Urban	27	22	17	4	7	4	3	10	6



Section 3:

Ad Recall



	During last week can you recall one 'Soap' advertisement on Tv or Newspaper or Billboard that you remember the most?											
	Lifebuoy	Safe guard	Lux	Tibet	Capri	Dettol	Sofi	Koh-eNoor	Others	None	DK	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	11	10	34	1	1	2	1	1	2	20	6	9
Male	10	12	34	1	2	3	1	0	2	19	7	10
Female	13	6	35	1	1	2	1	3	3	23	5	7
	11	10	34	1	1	2	1	1	2	20	6	9
Under 30	12	12	32	1	2	2	2	2	3	17	5	9
30 – 50	11	9	34	1	1	2	0	1	2	23	7	7
51+	12	8	43	0	2	1	0	0	0	11	6	16
No Response	12	0	30	0	0	0	0	0	0	35	12	12
	11	10	34	1	1	2	1	1	2	20	6	9
Illiterate	7	1	45	1	0	0	0	1	0	31	9	3
Literate but no formal Education	14	4	28	0	3	0	6	6	4	29	0	6
Upto Primary	12	11	24	0	1	0	2	0	4	27	13	4
Middle	14	13	31	0	2	3	2	3	0	17	6	7
Matric	8	10	38	3	1	5	0	0	3	15	4	12
Intermediate	11	9	26	1	0	1	0	0	2	20	13	16
Graduate	17	17	32	2	1	3	0	0	4	8	1	15
Post Graduate	11	25	39	1	5	2	0	0	3	10	1	3
Professional/Doctor	0	6	92	0	0	0	0	0	0	0	2	0
No Response	6	0	6	0	13	0	0	0	6	13	19	38
	11	10	34	1	1	2	1	1	2	20	6	9
Rural	12	8	33	1	1	2	1	2	1	23	7	8
Urban	10	16	36	2	2	2	0	0	5	13	3	11



	During last week can you recall one 'Shampoo' advertisement on Tv or Newspaper or Billboard that you remember the most?											
	Sunsilk	Life bouy	Pantene	Head & Shoulder	Bioamla	Dove	Medicam	Clear	Others	None	DK	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	36	8	11	11	3	1	1	7	1	8	3	10
Male	34	8	12	11	3	1	2	7	1	5	3	12
Female	38	8	10	11	3	1	0	6	1	10	4	8
	36	8	11	11	3	1	1	7	1	8	3	10
Under 30	38	10	9	9	3	1	0	11	1	8	3	7
30 – 50	34	8	13	12	4	1	1	4	1	8	4	11
51+	48	5	7	10	1	3	0	1	1	1	2	21
No Response	38	0	13	8	0	0	0	0	0	40	0	0
	36	8	11	11	3	1	1	7	1	8	3	10
Illiterate	51	1	8	3	0	0	0	14	0	11	4	8
Literate but no formal Education	28	8	11	9	0	0	0	20	0	24	0	1
Upto Primary	30	15	11	16	6	0	4	4	1	6	5	2
Middle	31	6	6	9	8	0	0	9	2	14	6	9
Matric	40	9	14	8	3	0	2	3	1	4	2	15
Intermediate	22	11	18	12	4	3	0	5	2	7	4	12
Graduate	43	8	8	13	2	2	0	4	3	3	3	12
Post Graduate	36	5	12	30	3	3	0	1	1	2	3	4
Professional/Doctor	10	82	0	6	0	0	0	0	0	0	0	2
No Response	18	0	6	2	0	0	0	19	0	6	6	43
	36	8	11	11	3	1	1	7	1	8	3	10
Rural	42	7	7	9	3	0	1	8	0	9	2	11
Urban	29	10	16	13	3	2	0	4	3	6	5	9



	During last week can you recall one 'Hair Colouring Product' advertisement on Tv or Newspaper or Billboard that you remember the most?								
	Polycolor	Kalakolo	Samsol	Keune	Garnier	Others	None	DK	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	13	11	4	12	3	6	8	21	22
Male	11	14	2	12	4	5	9	9	34
Female	15	8	6	12	3	6	7	30	12
	13	11	4	12	3	6	8	21	22
Under 30	11	11	1	25	6	5	6	1	34
30 – 50	15	10	5	9	3	6	9	28	16
51+	0	15	9	0	4	4	9	8	52
No Response	0	0	0	0	0	0	0	0	100
	13	11	4	12	3	6	8	21	22
Illiterate	4	0	0	62	0	0	0	34	0
Literate but no formal Education	0	4	5	82	0	0	5	0	5
Upto Primary	60	12	0	0	0	16	7	0	6
Middle	19	22	12	0	5	8	11	12	10
Matric	13	10	3	3	3	5	3	37	24
Intermediate	8	25	8	4	9	8	9	4	27
Graduate	14	7	2	6	3	8	18	2	40
Post Graduate	10	0	6	0	0	0	7	67	10
No Response	0	0	0	0	0	0	0	0	100
	13	11	4	12	3	6	8	21	22
Rural	9	4	0	21	0	0	0	37	30
Urban	17	16	8	5	6	10	15	7	15



Section 4:

Usage of different Brands



	Which 'soap' brand do you use the most?												
	Lifebuoy	Safe guard	Lux	Tibet	Capri	Dettol	Imperial	Sofi	Skin white	Koh-eNoor	Others	None	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	31	9	35	4	4	1	2	1	2	1	3	1	7
Male	29	12	33	5	5	1	2	1	2	0	2	1	7
Female	33	6	39	2	2	1	1	1	1	2	4	1	6
	31	9	35	4	4	1	2	1	2	1	3	1	7
Under 30	31	9	32	5	4	2	3	2	2	2	3	0	7
30 – 50	30	10	37	4	4	1	2	1	2	1	2	1	6
51+	37	5	34	1	2	1	1	1	0	0	6	1	13
No Response	23	35	30	0	0	0	0	0	0	0	0	12	0
	31	9	35	4	4	1	2	1	2	1	3	1	7
Illiterate	41	10	39	4	0	0	0	0	0	1	2	0	3
Literate but no formal Education	38	1	24	3	12	0	3	6	0	3	1	0	7
Upto Primary	29	8	43	6	1	1	3	2	0	2	4	0	2
Middle	37	12	33	3	4	0	2	0	2	2	1	0	4
Matric	24	7	33	5	6	2	2	1	3	0	3	2	11
Intermediate	29	14	35	4	2	1	0	1	0	0	7	1	6
Graduate	25	8	35	3	3	1	6	0	5	0	2	0	12
Post Graduate	17	21	42	1	7	4	1	0	0	0	3	2	2
Professional/Doctor	0	86	14	0	0	0	0	0	0	0	0	0	0
No Response	13	19	0	0	0	0	0	0	0	0	0	13	56
	31	9	35	4	4	1	2	1	2	1	3	1	7
Rural	34	8	35	4	3	0	2	1	2	1	1	0	6
Urban	20	14	34	4	5	3	1	1	0	0	7	2	7



	Which 'Shampoo' brand do you use the most?									
	Sunsilk	Life bouy	Pantene	Head & Shoulder	Bioamla	Dove	Medicam	Clear	Others	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	37	12	13	13	8	2	3	3	2	7
Male	33	14	13	17	4	1	4	4	2	8
Female	40	9	13	10	12	3	2	1	2	6
	37	12	13	13	8	2	3	3	2	7
Under 30	39	13	14	12	8	1	2	3	2	7
30 – 50	35	11	12	14	10	2	4	3	3	7
51+	43	12	11	13	2	2	0	0	2	15
No Response	38	27	27	8	0	0	0	0	0	0
	37	12	13	13	8	2	3	3	2	7
Illiterate	57	6	8	6	18	0	0	0	0	5
Literate but no formal Education	40	8	15	15	9	1	9	2	0	1
Upto Primary	32	19	11	5	30	0	0	1	1	1
Middle	44	13	12	11	10	0	3	2	2	3
Matric	36	8	14	15	3	2	4	2	3	13
Intermediate	25	13	17	13	4	4	1	7	3	13
Graduate	33	17	12	16	4	4	4	3	3	4
Post Graduate	30	4	15	34	1	3	1	2	5	5
Professional/Doctor	7	82	6	0	0	0	0	5	0	0
No Response	24	12	6	2	0	0	0	0	0	56
	37	12	13	13	8	2	3	3	2	7
Rural	42	13	9	14	10	0	5	0	1	7
Urban	30	10	18	13	7	4	1	5	5	8



	Which 'Hair Colouring Product' brand do you use the most?								
	Polycolor	Kalakolo	Samsol	Olivia	Keune	Bigen	Prisma	Others	NR
	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%	Row%
	19	13	19	2	13	4	3	7	20
Male	10	18	11	3	12	2	2	10	33
Female	27	9	25	2	14	5	3	4	10
	19	13	19	2	13	4	3	7	20
Under 30	9	18	3	0	25	0	2	10	33
30 – 50	24	12	24	3	11	5	3	5	14
51+	4	15	9	4	0	4	4	12	48
No Response	0	0	0	0	0	0	0	0	100
	19	13	19	2	13	4	3	7	20
Illiterate	0	0	35	0	62	0	0	3	0
Literate but no formal Education	0	4	5	0	82	0	0	5	5
Upto Primary	60	12	9	0	0	0	12	0	7
Middle	15	23	27	0	3	0	8	17	7
Matric	17	14	22	4	4	9	3	6	21
Intermediate	25	25	4	4	6	0	0	11	25
Graduate	18	13	13	2	7	3	3	5	36
Post Graduate	43	0	41	0	0	0	0	4	13
No Response	0	0	0	0	0	0	0	0	100
	19	13	19	2	13	4	3	7	20
Rural	19	4	21	0	21	5	0	0	30
Urban	20	21	17	4	7	2	5	12	12



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