# VIETNAM HAIR CARE MARKET

## Usage & Attitudes Study

Understanding consumer behavior, preferences, and trends in Vietnam’s hair care market

2025 Mar



INSIGHTASIA



# Overview

## Research Objectives

- Map current hair care product usage patterns
- Identify key purchase drivers and barriers
- Measure brand performance and positioning
- Segment consumers based on attitudes and behaviors
- Determine future trends and opportunities

## Fieldwork Details

**Sample Size:** 462.

**Demographics:** Men & women aged 18-55.

**Geography:** Urban & suburban areas across 6 cities: Hanoi, HCMC, Da Nang, Can Tho, Hai Phong, Nha Trang.

**Methodology:** Online survey with follow-up qualitative interviews (with 08 survey respondents representing different consumer segments).

**Fieldwork Period:** January – February 2025

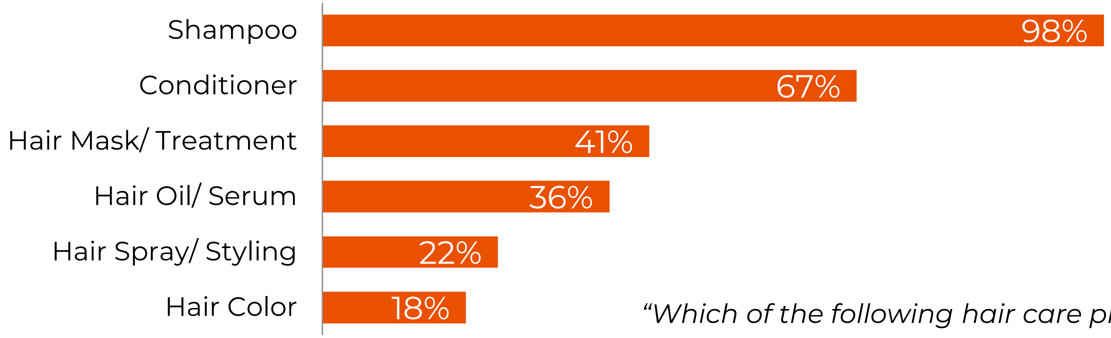
# Hair Care Usage Patterns

## Hair Wash Frequency

*"How often do you typically wash your hair?" (n=462)*

- **68%** — *Daily*
- **22%** — *Every other day*
- **8%** — *2-3 times a week*
- **2%** — *Once a week or less*

## Product Usage Frequency (% of users using product regularly)



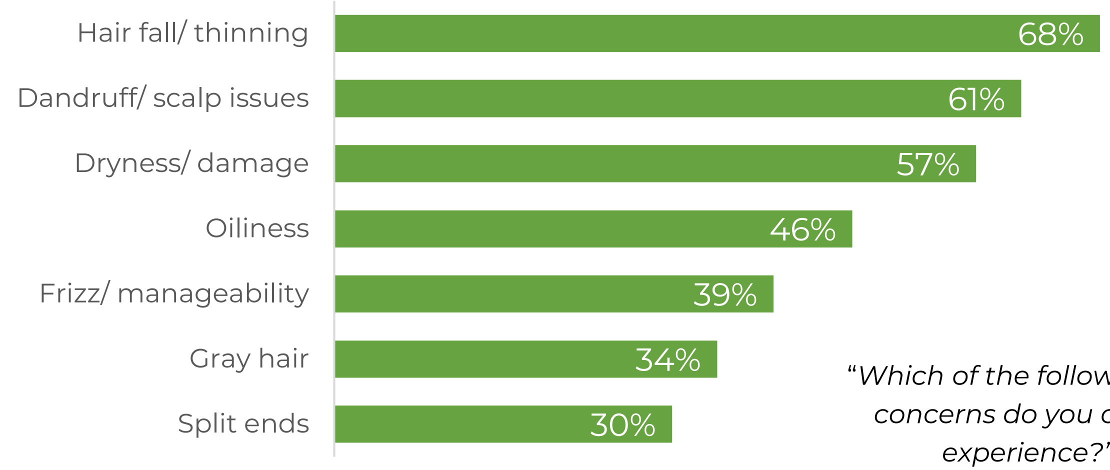

*"Which of the following hair care products do you use regularly (at least once per week)?" (n=462)*

## Usage Pattern Insights:

- Vietnamese consumers exhibit high hair wash frequency, with 68% washing their hair daily due to climate, lifestyle, and cultural factors.
- Conditioner usage shows significant urban-rural divide: 78% usage in urban areas vs. 51% in rural/suburban areas.
- Treatment products (masks, oils) show stronger adoption among women (52%) than men (25%).
- Men represent a growing segment in specialized products, with 32% now using conditioners (up from 21% in a 2022 study).

# Primary Hair Concerns

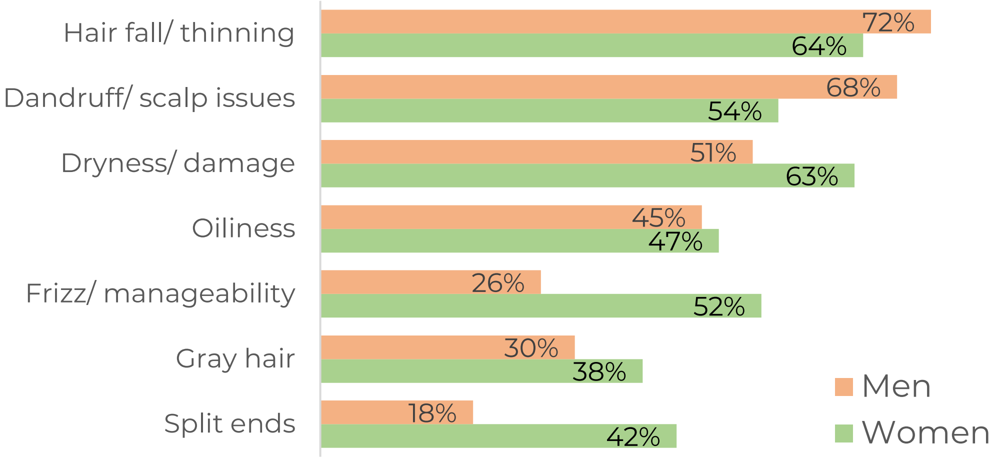
## Top Hair Concerns (Overall)




*"Which of the following hair concerns do you currently experience?" (n=462)*

## Concerns by Gender

*(Women n=249, Men n=213)*




## Usage Pattern Insights:

- **Hair fall/ thinning is the dominant concern across demographics**, particularly among men (72%) and older age groups (80% for 45-55).
- **Environmental factors** (pollution, humidity) combine with dietary changes to influence the high prevalence of hair and scalp issues.
- Women show greater concern for appearance-related issues (frizz 52%, split ends 42%), while men prioritize functional concerns (dandruff 68%, hair fall 72%).
- **Age-related concerns** show clear patterns: younger groups worry more about oil control and dandruff, while older groups focus on hair fall and graying.

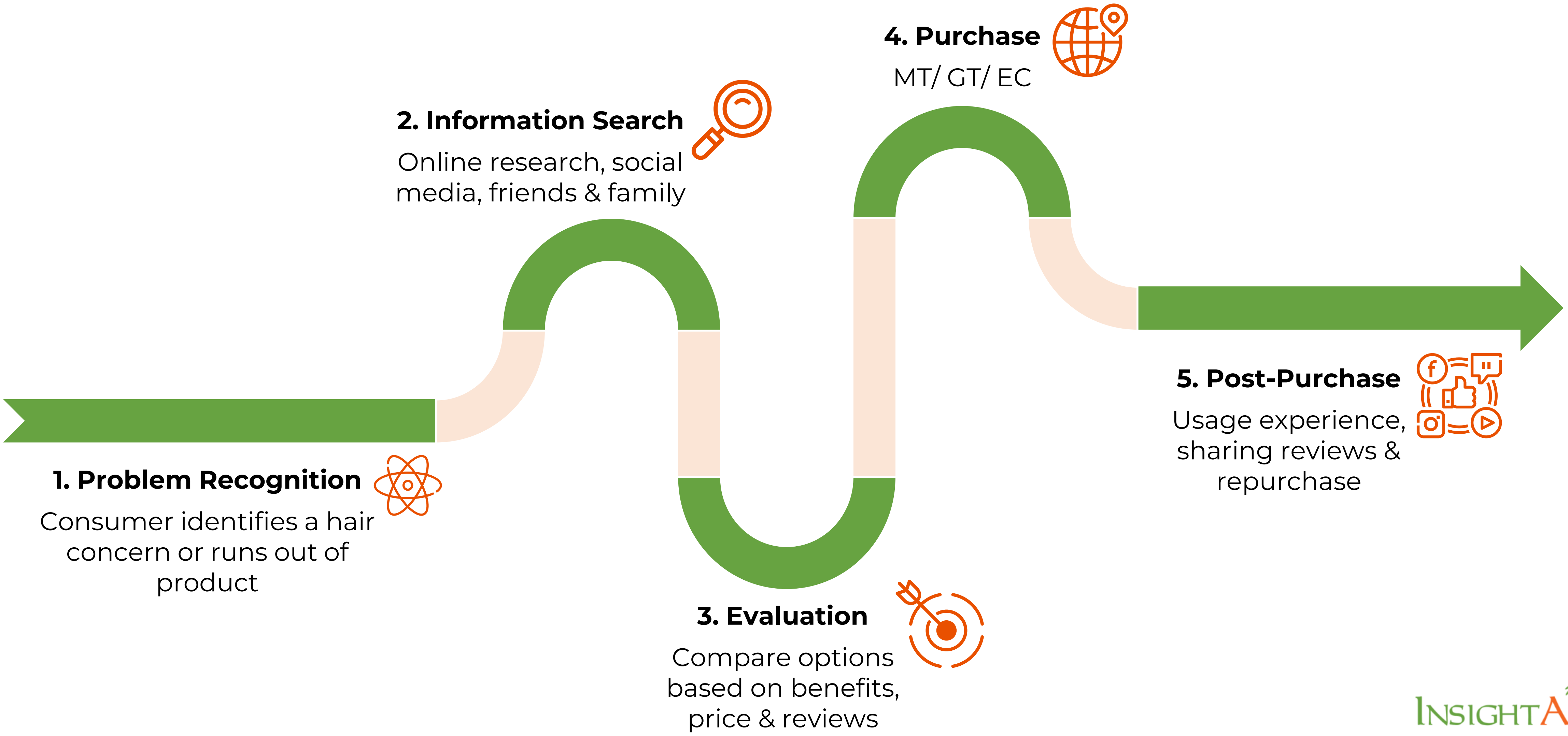
## Concerns by Age Group

*(Base: Users of each age group)*

| Concerns | 18-24 | 25-34 | 35-44 | 45-54 |
|---|---|---|---|---|
| Hair fall | 52% | 65% | 75% | 80% |
| Dandruff | 68% | 64% | 58% | 54% |
| Damage | 61% | 64% | 55% | 48% |
| Gray hair | 8% | 22% | 45% | 61% |

# Hair Care Purchase Journey

*Qualitative interviews with 08 consumers and journey mapping exercises*



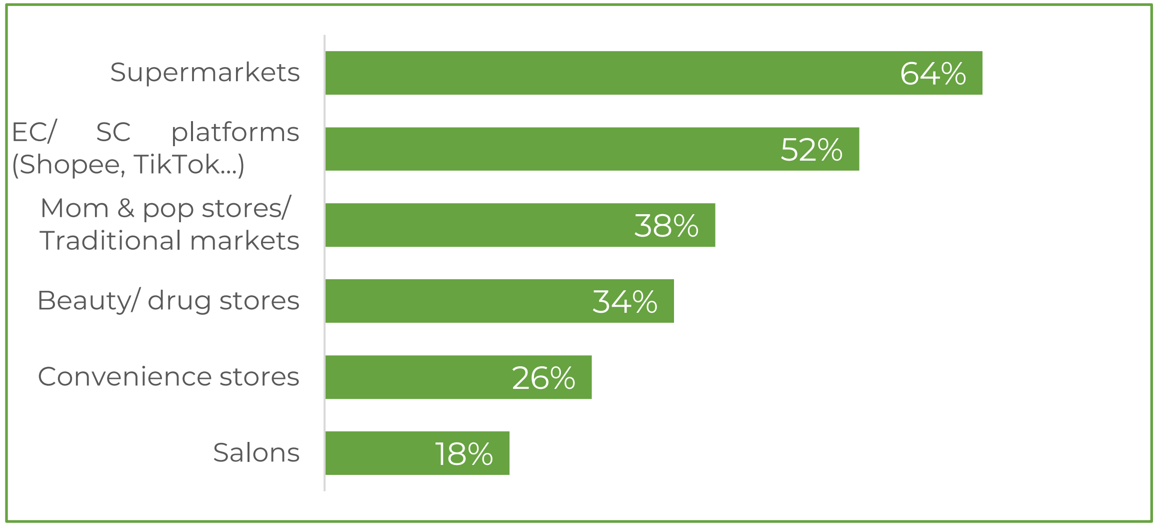
# Hair Care Purchase Behavior

## Purchase Frequency

| Product Type | Monthly | Every 2-3 months | Every 4-6 months | Less often |
|---|---|---|---|---|
| Shampoo | 24% | 42% | 26% | 8% |
| Conditioner | 18% | 38% | 32% | 12% |
| Hair Treatments | 15% | 25% | 34% | 26% |
| Styling Products | 12% | 22% | 32% | 34% |

*"How often do you typically purchase the following hair care products?"*
*(Base: Users of each product type)*

## Top Hair Concerns (Overall)



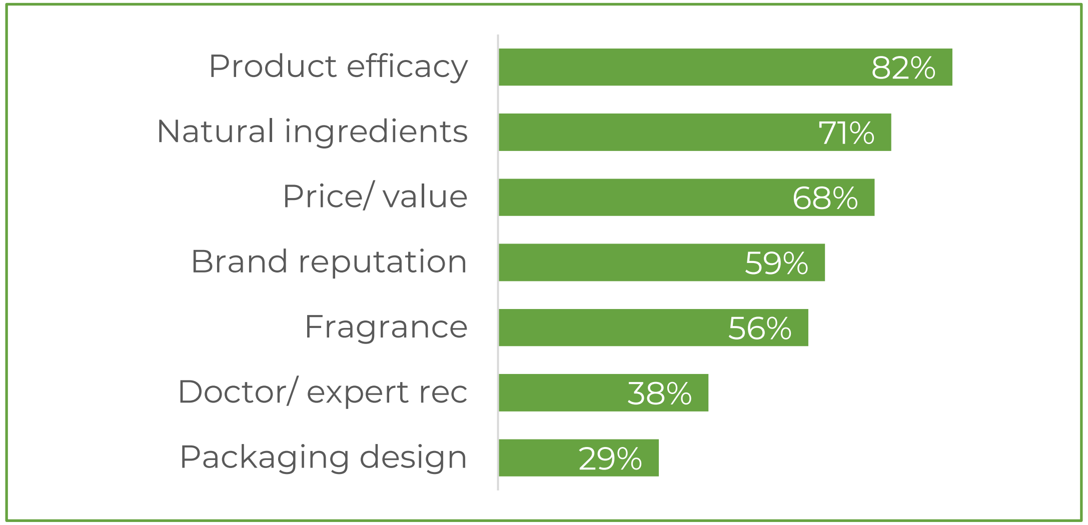

*"Where do you typically purchase hair care products?"*
*(n=462)*

## Purchase Behavior Insights:

- The typical Vietnamese consumer purchases shampoo and conditioner every 2-3 months, with specialty products bought less frequently.
- **E-commerce and Social-commerce** have gained significant ground (52%) for hair care purchases, with higher penetration in urban centers (64% in HCMC and Hanoi).
- Channel preferences vary by product type: mass products predominantly from supermarkets and traditional retail, while premium products from e-commerce and specialist stores.
- **Social media** plays a critical role in the discovery phase, with 68% of consumers researching hair care products online before purchase.

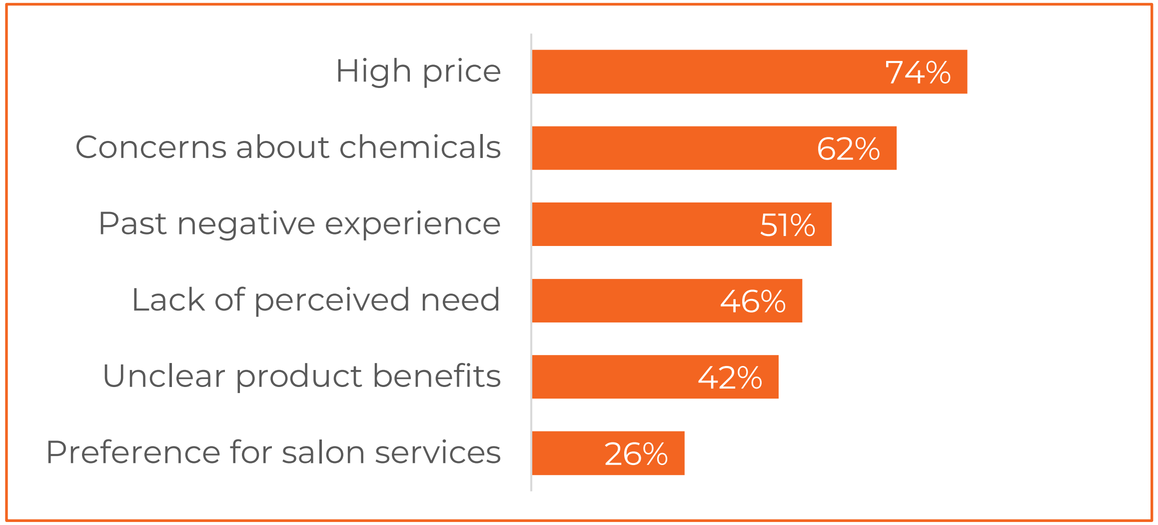
# Purchase Drivers & Barriers

## Key Purchase Drivers




*"Which factors are most important when choosing hair care products?"*
*(n=462)*

## Purchase Barriers



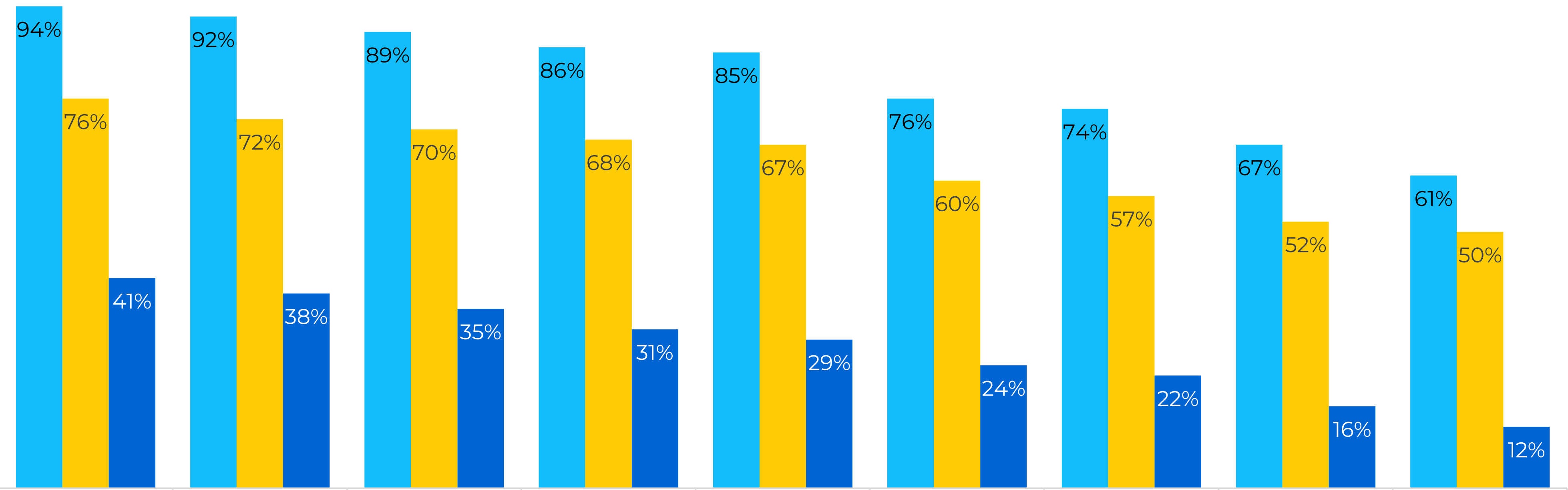

*"What factors prevent you from purchasing certain hair care products"*
*(n=462)*



## Purchase Decision Insights:

- **Product efficacy** (82%) remains the primary purchase driver, demonstrating that performance trumps other considerations.
- **Natural ingredients** (71%) has emerged as a major purchase driver, reflecting growing consumer focus on health and sustainability.
- Specialized treatments face barriers due to **price sensitivity** (74%) and perceived value concerns.
- **Chemical concerns** represent a growing barrier (62%), particularly among educated urban consumers who research ingredient safety.

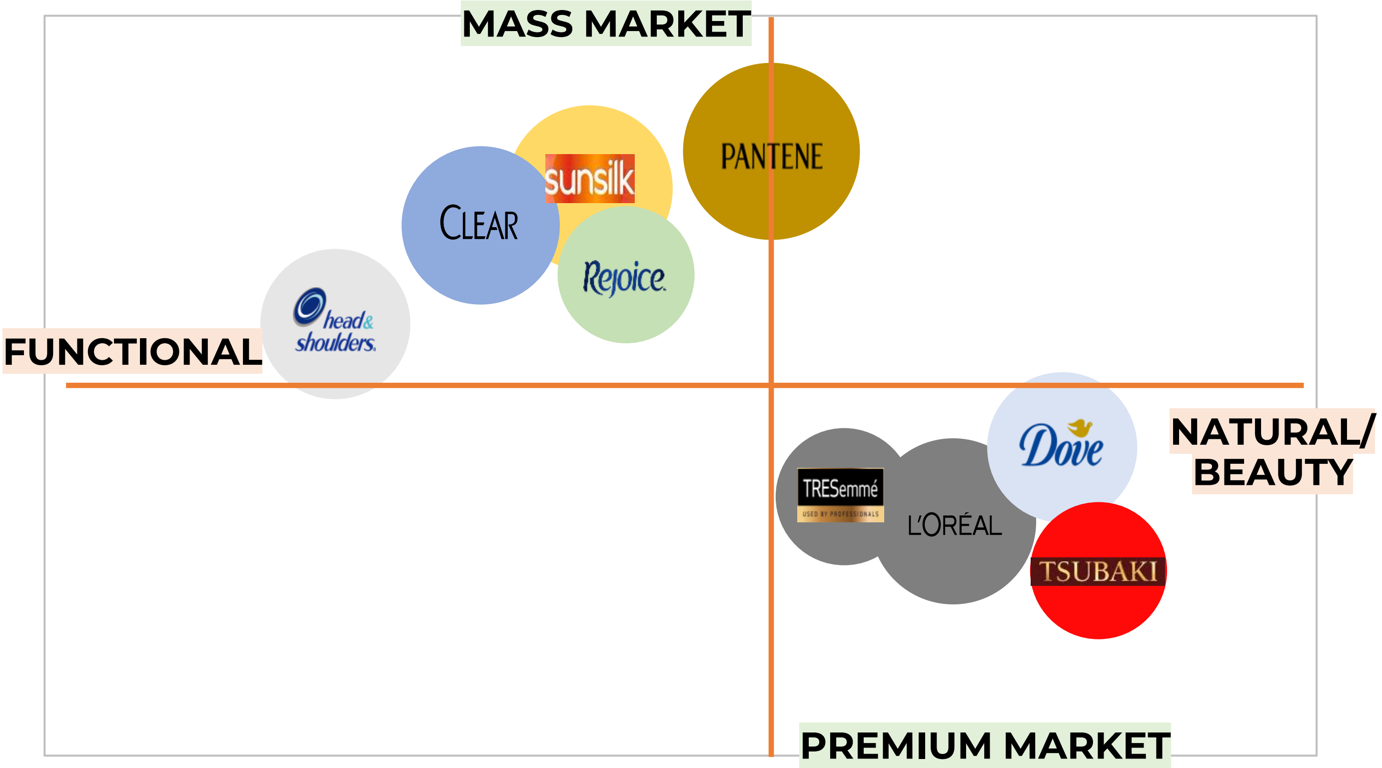
# Brand Awareness, Consideration & Usage




| | Pantene | Sunsilk | Clear | Dove | Head & Shoulders | L'Oréal | Rejoice | TRESemmé | Tsubaki |
|---|---|---|---|---|---|---|---|---|---|
| Awareness | 94% | 92% | 89% | 86% | 85% | 76% | 74% | 67% | 61% |
| Consideration | 76% | 72% | 70% | 68% | 67% | 60% | 57% | 52% | 50% |
| Usage | 41% | 38% | 35% | 31% | 29% | 24% | 22% | 16% | 12% |

*Awareness – "Which of these brands are you aware of?" (n=462)*
*Consideration – "Which would you consider buying?" (n=462)*
*Usage – "Which have you used in the past 6 months?" (n=462)*

# Brand Imagery & Association




## Key Brand Attributes

| Attribute | Leading Brand | Score |
|---|---|---|
| Best value for money | Sunsilk | 72% |
| Most effective for dandruff | H&S | 78% |
| Best for damaged hair | Pantene | 68% |
| Most natural ingredients | Dove | 62% |
| Most innovative | L'Oréal | 64% |
| Best fragrance | Pantene | 58% |
| Premium quality | Tsubaki | 56% |
| Best for daily use | Sunsilk | 60% |

## Brand Performance Insights:

- P&G and Unilever brands dominate the market with combined 58% share, but face increasing competition from premium Asian and global brands.
- Dove has successfully positioned itself at the intersection of natural ingredients and beauty, capturing health-conscious consumers.
- Japanese brands (e.g., Tsubaki) are gaining traction in the premium segment, leveraging their Asian beauty expertise and ingredient stories
- Awareness-to-usage conversion remains a challenge for premium brands, highlighting opportunities to strengthen value proposition communication.

# Hair Care Consumer Segments

## Basic Maintenance
**38%**

**Demographics:** Mixed age groups, lower-middle income, both urban and rural.
**Attitudes:** Pragmatic approach to hair care, focused on cleanliness and basic maintenance.
**Behavior:** Use basic shampoo products, minimal conditioning, price-sensitive, prioritize value.
**Key brands:** Sunsilk, Clear, Rejoice.

## Natural Solution Seekers
**26%**

**Demographics:** 25-45 years, middle-upper income, urban-focused.
**Attitudes:** Health-conscious, environmentally aware, skeptical of chemicals.
**Behavior:** Research ingredients, prefer natural-positioned products, willing to pay premium for clean formulations.
**Key brands:** Dove, Herbal Essences, local natural brands.

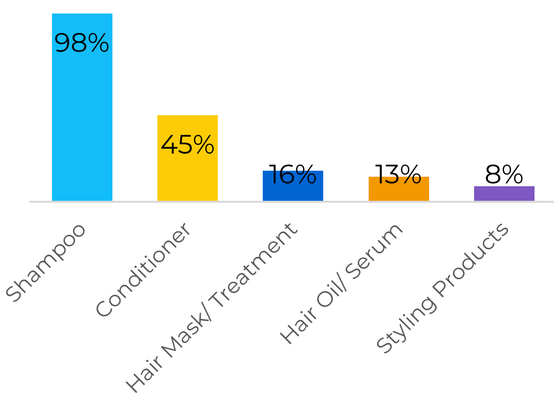
## Problem Solvers
**24%**

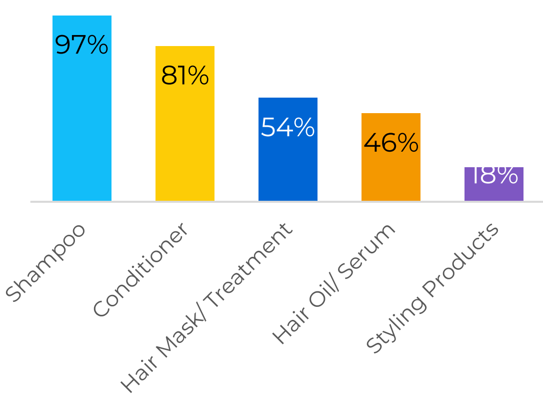
**Demographics:** Primarily 30-50 years, mixed income levels.
**Attitudes:** Functional approach, seeking solutions to specific hair problems.
**Behavior:** Targeted product usage, trust expert recommendations, moderate price sensitivity.
**Key brands:** Head & Shoulders, specialized treatment brands.

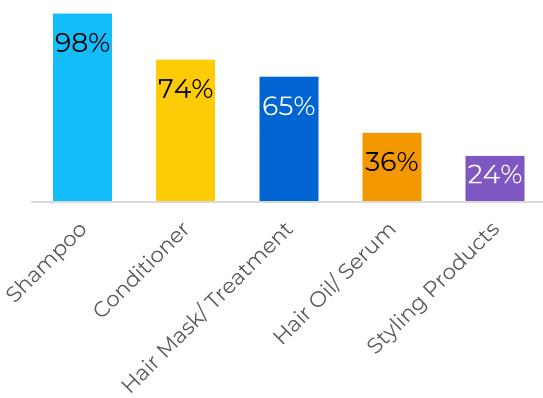
## Beauty Enthusiasts
**12%**

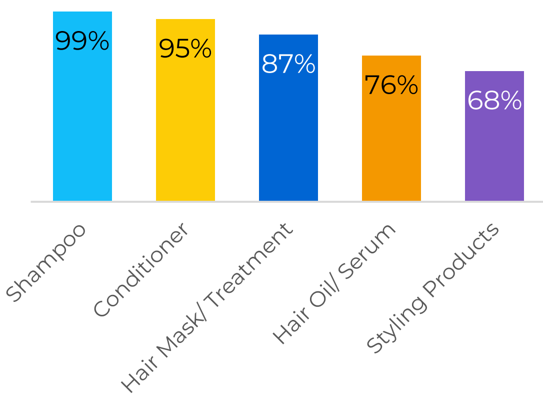
**Demographics:** Primarily 18-35 years, higher income, urban centers
**Attitudes:** Trend-conscious, view hair as fashion statement, high beauty involvement
**Behavior:** Complete hair care regimen, experiment with products, high social media engagement
**Key brands:** L'Oréal, TRESemmé, Tsubaki, international salon brands

## Product Usage by Segment



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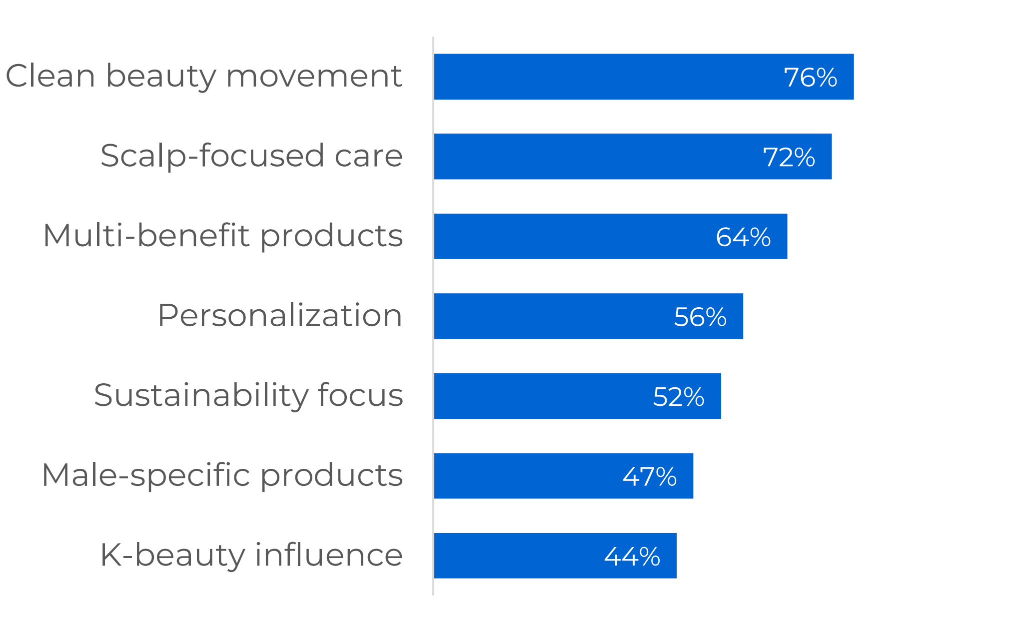
# Emerging Trends in Hair Care

## Emerging Trends




*“Which of the following hair care trends are you aware of?“ (n=462)*
*“Which trends interest you the most?“ (n=462)*

## Strategic Implications

### Product Development

- Formulate with natural, clean ingredients while maintaining efficacy.
- Develop products addressing specific Vietnamese hair concerns (pollution protection, humidity control).
- Invest in scalp health solutions beyond dandruff control.
- Create multi-functional products to streamline routines while delivering benefits.

### Marketing Strategy

- Educate consumers on complete hair care routines using multi-channel approach.
- Build digital communication strategy targeting growing EC segment.
- Develop targeted offerings for key segments based on distinct needs
- Implement transparent ingredient communication to address chemical concerns.

# Conclusion & Recommendations



**The Vietnamese hair care market presents significant growth opportunities, particularly in premium and specialized segments.**

1. Companies should focus on developing clean formulations with proven efficacy, scalp health solutions, and comprehensive hair care systems.

2. Digital engagement and education remain critical to driving category development.

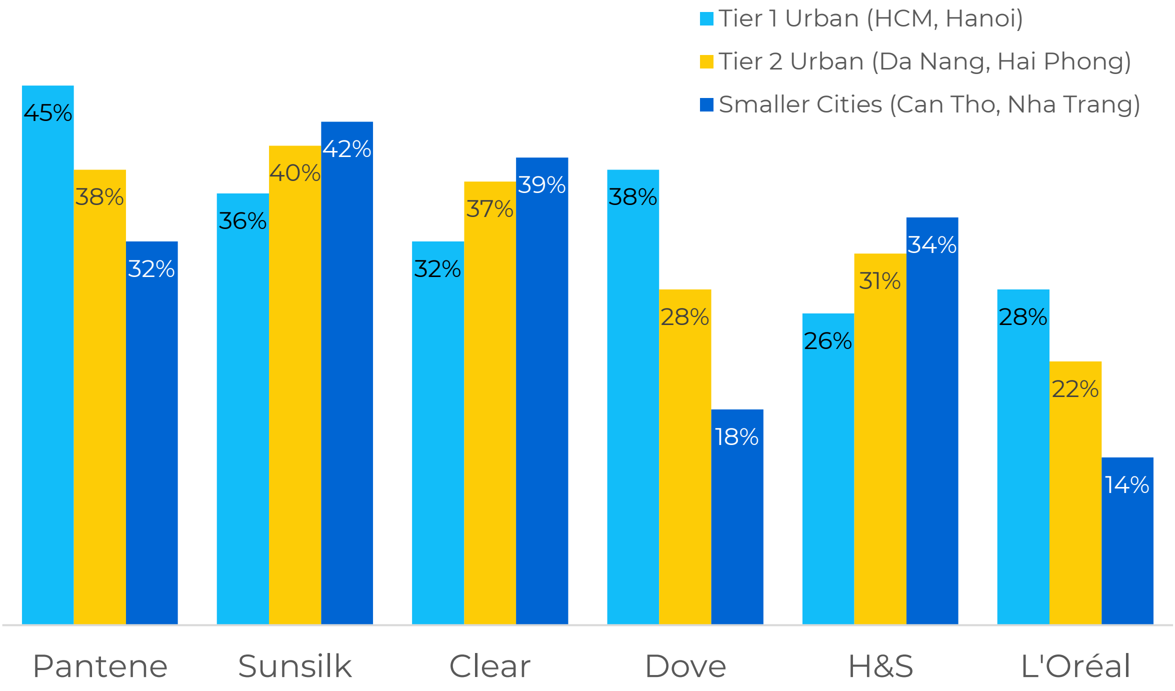
3. While maintaining leadership in traditional channels, brands should accelerate EC strategies to capture the rapidly growing online segment.

4. Tailored approaches for each consumer segment will maximize market potential across urban and rural markets.

# Additional Analysis

# Brand Usage Analysis by Area: Urban vs. Rural

*"Which have you used in the past 6 months?" (n=462)*




## Key Pattern: Urban-Rural Brand Divide

The data reveals distinct patterns in brand preference between urban and rural areas. Premium and beauty-focused brands like Dove and L'Oréal show significantly higher usage in urban centers, while functional brands and more affordable options demonstrate stronger performance in smaller cities.

## Key Insights: Brand Performance by Area

- **Premium International Brands** (Dove, L'Oréal, Pantene) show significantly higher penetration in major urban centers, with clear statistical significance ($p < 0.05$). This reflects greater exposure to international trends, higher disposable income, and more developed retail infrastructure.
- **Mass Market Brands** (Sunsilk, Clear) perform more consistently across regions, with slightly higher usage in smaller cities and rural areas. These brands' value positioning and widespread distribution contribute to this pattern.
- **Functional Brands** (Head & Shoulders) show an interesting reverse trend, with higher penetration in smaller cities where specialized concerns like dandruff might be addressed through targeted functional products rather than premium multi-benefit solutions.
- **The Urban-Rural Divide** is most pronounced for beauty-positioned brands, with Dove showing a 20% difference between Tier 1 urban usage (38%) and smaller cities (18%).



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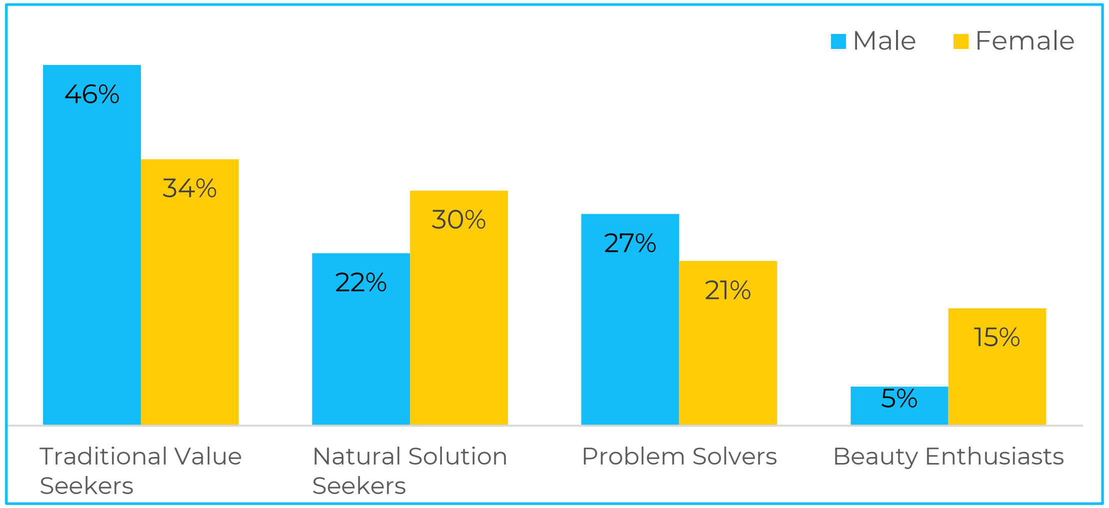
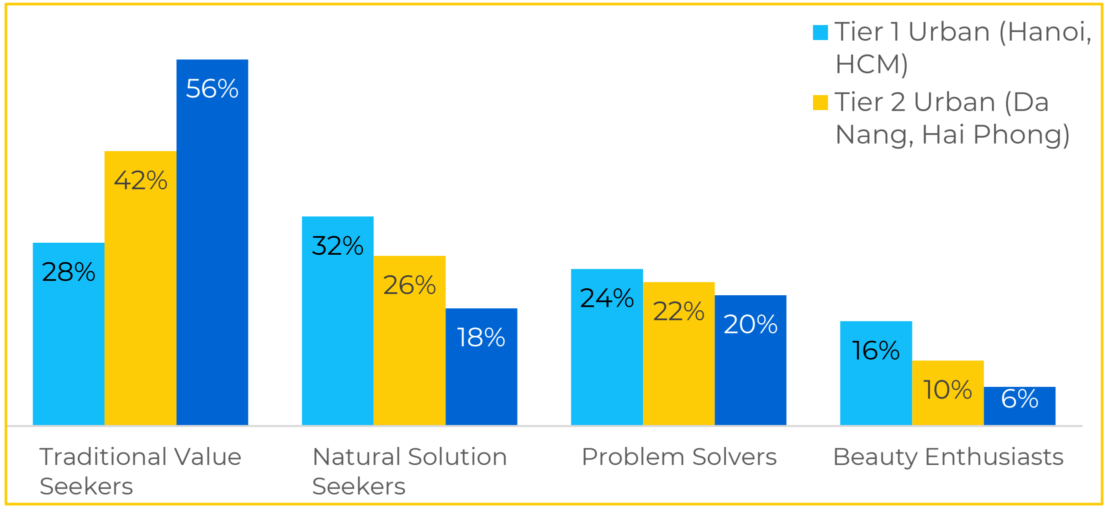
# Consumer Segments by Gender & Area

## Consumer Segments by Gender




## Consumer Segments by Area




**Basic Maintenance**
**38%**
Male dominant (46%)
Rural skew (56%)
Basic, functional benefits
Price sensitive

**Natural Solution Seekers**
**26%**
Female skew (30%)
Urban skew (32%)
Health-conscious
Ingredient-focused

**Problem Solvers**
**24%**
Male skew (27%)
Even distribution
Targeted solutions
Efficacy-focused

**Beauty Enthusiasts**
**12%**
Female dominant (15%)
Rural skew (56%)
Basic, functional benefits
Price sensitive

# Consumer Segments by Gender & Area

## Key Demographic Patterns

- **Gender divide** is most pronounced in Beauty Enthusiasts (3x higher female representation) and Traditional Value Seekers (significantly higher male representation).
- **Urban-rural gradient** is evident across all segments, with Traditional Value Seekers increasing in prevalence as we move from urban to rural areas (28% to 56%).
- **Problem Solvers** show the most consistent distribution across both gender and geographic variables, indicating universal hair concerns.
- **Natural Solution Seekers** show moderate gender and geographic differences, with higher prevalence among females and urban consumers.

## Strategic Implications

### Gender-Specific Marketing Approaches

**Male-Targeted Strategies**
- Focus on functional benefits and value proposition for Traditional Value Seekers.
- Develop problem-specific solutions with clear efficacy claims for Problem Solvers.
- Use straightforward messaging that emphasizes performance.
- Create educational content about basic hair care routines.

**Female-Targeted Strategies**
- Emphasize natural ingredients and sustainability for Natural Solution Seekers.
- Create premium, trend-focused products for Beauty Enthusiasts.
- Leverage social media and influencer marketing.
- Develop multi-step routines with specialized products.

### Geographic Marketing Approaches

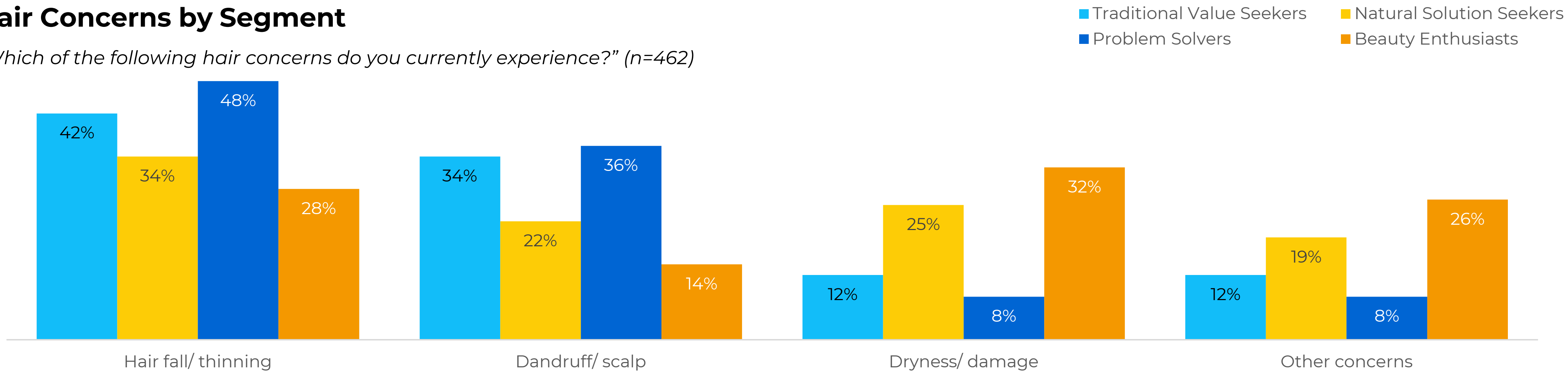
**Urban Marketing (Tier 1 & 2)**
- Target Beauty Enthusiasts and Natural Solution Seekers.
- Focus on premium positioning and specialty products.
- Leverage digital and social channels.
- Create experience-based marketing in modern trade.

**Smaller Cities/ Rural Marketing**
- Focus on Traditional Value Seekers with value messaging.
- Develop affordably priced products with basic benefits.
- Use mass media and traditional retail channels.
- Create educational campaigns about hair care basics.

# Primary Concern by Consumer Segment

## Hair Concerns by Segment

*"Which of the following hair concerns do you currently experience?" (n=462)*






### Basic Maintenance
**38%**

Hair fall (42%)

Dandruff (34%)

Focus on functional issues with clear, visible symptoms. Prefer straightforward solutions at affordable prices. Less concerned with appearance-related issues

### Natural Solution Seekers
**26%**

Hair fall (34%)

Dryness/ damage (25%)

Balance of functional and appearance concerns. Seek natural solutions that offer hair health benefits while avoiding harsh chemicals.

### Problem Solvers
**24%**

Hair fall (24%)

Dandruff (36%)

Highly focused on specific functional problems requiring targeted solutions. Seeking products with proven efficacy for their particular issues.

### Beauty Enthusiasts
**12%**

Dryness/ damage (32%)

Hair fall (28%)

Emphasis on appearance-related concerns like dryness, frizz, and manageability. Looking for products that enhance hair beauty and style.

# Primary Concern by Consumer Segment

## Key Hair Concern Analysis

### Hair fall/ Thinning (38%)

- Problem Solvers 48%
- Traditional Value Seekers 42%
- Natural Solution Seekers 34%
- Beauty Enthusiasts 28%

### Dandruff/ Scalp Issues (28%)

- Problem Solvers 36%
- Traditional Value Seekers 34%
- Natural Solution Seekers 22%
- Beauty Enthusiasts 14%

### Dryness/ Damage (19%)

- Beauty Enthusiasts 32%
- Natural Solution Seekers 25%
- Traditional Value Seekers 12%
- Problem Solvers 8%

### Style-Related Concerns (15%)

- Beauty Enthusiasts 17%
- Natural Solution Seekers 12%
- Traditional Value Seekers 3%
- Problem Solvers 2%

## Key Insights: Hair Concerns by Segment

- **Functional vs. Appearance Divide**: Traditional Value Seekers and Problem Solvers focus overwhelmingly on functional issues (hair fall, dandruff), while Beauty Enthusiasts and Natural Solution Seekers show greater concern for appearance and damage-related issues.
- **Hair Fall as Universal Concern**: While hair fall is the top concern across all segments, its intensity varies significantly (48% for Problem Solvers vs. 28% for Beauty Enthusiasts), indicating different tolerance thresholds and priorities.
- **Dandruff Priorities**: The significant difference in dandruff concern between Problem Solvers (36%) and Beauty Enthusiasts (14%) highlights how functional concerns vary by segment, with implications for targeted marketing.
- **Appearance-Related Concerns**: Style-related issues like frizz and manageability show the most dramatic segment differences, with Beauty Enthusiasts 8.5x more concerned than Traditional Value Seekers.

## Strategic Implications for Product Development

| Segment | Primary Focus | Product Opportunity |
|---|---|---|
| Traditional Value Seekers | Hair fall, Dandruff | Affordable anti-hair fall formulas with basic anti-dandruff properties |
| Natural Solution Seekers | Hair fall, Dryness | Natural ingredient-based products with dual benefits for strength and moisture |
| Problem Solvers | Hair fall, Dandruff | Specialized, high-efficacy products with clinical credentials |
| Beauty Enthusiasts | Dryness, Hair fall | Premium products focusing on shine, smoothness, and damage repair |

# About Us

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# We Are

# INSIGHTASIA

The Asia Market Research Specialist

## Bringing a deep understanding of local needs, lifestyles, preferences & trends

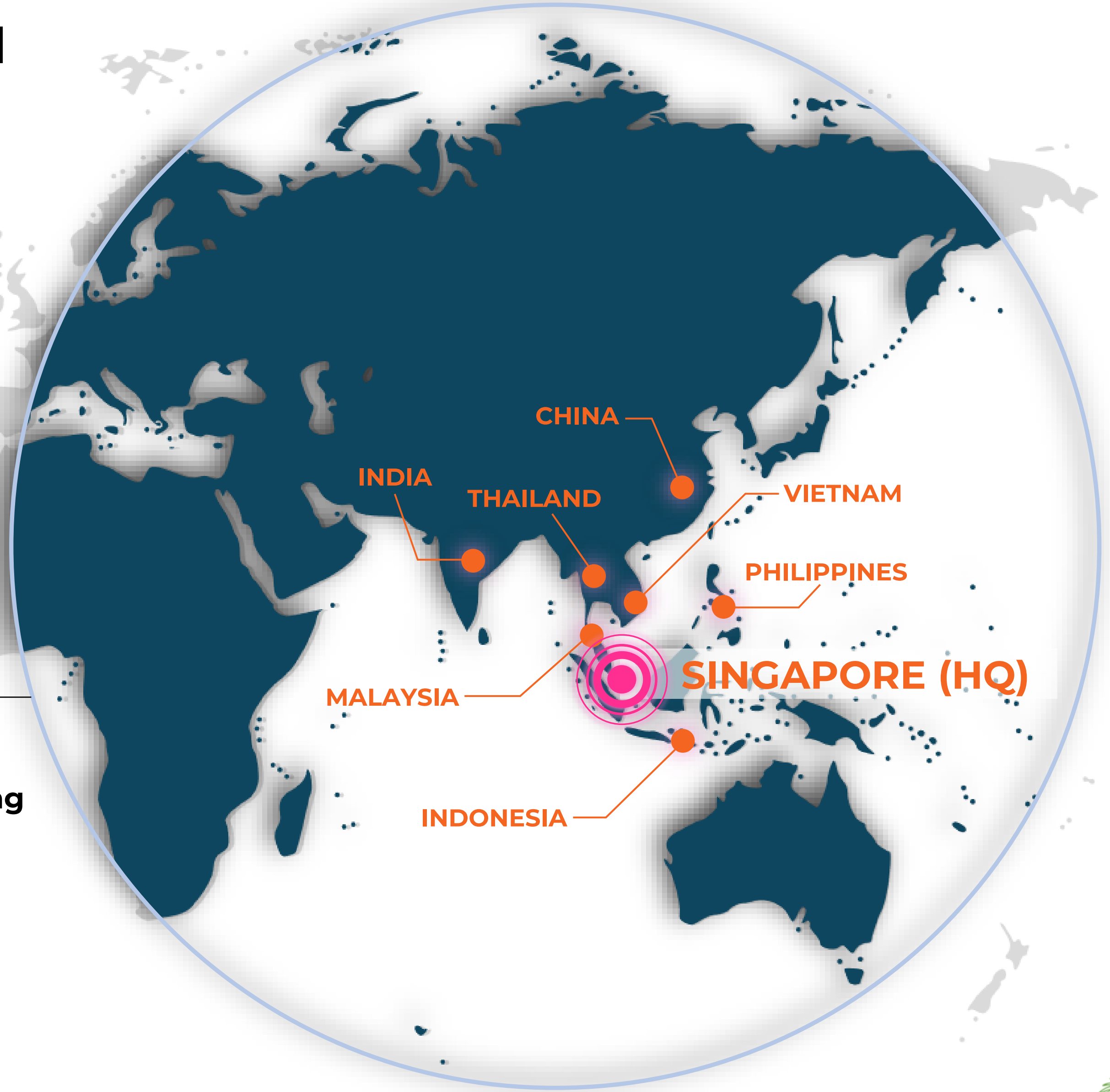
# We are TRULY LOCAL

Founded in Asia, focused on Asia.

Our locally based research experts deliver a richer understanding of the Asian consumer context.

Delivered through our 6 full-service offices, specialist sensory office in India and field servicing office in China.

Rich local knowledge: 120+ on the ground researcher.



# We Are

# SMALL enough to care & BIG enough to trust



**We champion innovative research**

Technical rigor and quality control, combined with research passion, creativity and smarter thinking

**We bring real local knowledge**

To provide ‘up to the minute’ understanding of the evolving competitive & consumer context

# Our Clients Trust Us
# Because We Understand

- Asia.
- Efficient and effective research design.
- The need for practical and actionable solutions.



## We Are your
# THINKING PARTNERS

# Local & Regional Clients

Across Industries

airbnb, Cerebos, DIAGEO, ASIATIQUE, CHEVROLET, eTika, AirAsia

facebook, Fonterra, FrieslandCampina, Givaudan, gsk, Heineken, IFF

Imperial Leather, Instagram, intel, INVISTA, Jollibee, KALBE, KIRIN

meiji, Nestlé, OLIVER WYMAN, OLX, oppo, PHILIPS

pwc, PZ Cussons, SAMSUNG, Singapore Tourism Board, Tencent 腾讯, TERMINAL 21

WhatsApp, Tiger, Trinetra, TRIUMPH, true, Unilever, PIDM

Grab, celcom, HUAWEI, ZUELLIG PHARMA, INTI, TENAGA NASIONAL, ctos

PALMOLIVE NATURALS, unicharm, L'ORÉAL, AVON

Takashimaya, AEON

LOOP, VINCOM, MUJI 無印良品

guardian, FujiMART

AJINOMOTO, Acecook, CJ, Zott

BRITISH AMERICAN TOBACCO, Kao, ROHTO

TAISHO PHARMACEUTICAL, DHG PHARMA Vì một cuộc sống khỏe đẹp hơn

THE WORLD BANK, VietinBank

RMIT UNIVERSITY, MONASH University

HONDA, PIAGGIO

...and more



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# (B2C) What we do



**Survey: F2F/ Online**


**Focus Group**

**Home Usage Test**


**Central Location Test**

**Along shopping**

**Retail check/ audit**

**Ethnography**

**Mystery shopping**

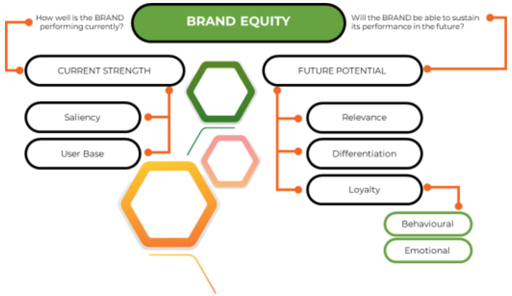
# (B2B) What we do



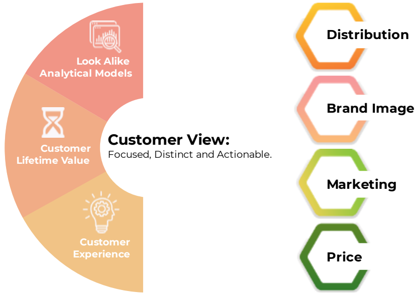
## Survey: F2F/ Online


## In-depth Interview

## Competitor Analysis




## Market Analysis




## ROMI Analysis


## Ideation Workshop

# Mr. Pham Anh Tuan

**Research Director, Country Manager || VIETNAM**

Tuan is a seasoned senior marketing research with over 15 years of expertise, **specializing in B2B marketing research**. His focus is on market exploration and penetration studies within various sectors, both locally and regionally. With a **unique background in IT and market research**, Tuan leverages his technical skills to enhance data analysis and market insights, providing a comprehensive understanding of market dynamics.

Renowned for his **analytical skills** and **consultative approach**, Tuan has contributed significantly to the understanding of consumer trends and market dynamics.

Tuan's insights are occasionally featured in local newspapers i.e. Dan Tri, Tuoi Tre Online, and on Vietnam primary TV channels, where he shares his expert vision on the evolving markets.

- **2009 – 2016**: Manager, Epinion Vietnam
- **2016 – 2021**: Research Director, Asia Plus (Q&Me) & Kadence Vietnam
- **2021 – 2023**: Research Director, Macromill Vietnam
- **2024 – Now**: Country Manager, InsightAsia Vietnam



# Ready to EXPLORE



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