CHAPTER IV

RESEARCH RESULTS

This chapter presents the results of the study. It starts with a description of the general demographic characteristics of the sample size, followed by an analysis and discussion of the hair characteristics, unaided brand awareness, usage patterns and product performance evaluation. This study also examine if differences exist among the ethnic groups with regards to product performance evaluation. Purchase patterns, factors that influence consumers' choice of hair shampoo and the relative importance of factors in influencing decision-making will then be discussed. Lastly, this study examine if ethnic groups differences exist with regards to factors influencing choice of hair shampoo.

A total of 497 sets of questionnaires were distributed for this study. Out of this total, 386 sets were in English and 111 sets were in Bahasa Malaysia. Of the 497 sets of questionnaires distributed, a total of 410 responses were received. Of these, 102 sets of questionnaires were not usable due to incomplete information and wrong sample group. The data were analyzed with a sample size of 308, representing 75% of usable rate. All the respondents were buyers and users of hair shampoo.

Demographic Profile of the Respondents

Table 6 represents the demographic profile of the respondents. The sample was skewed towards Chinese with 54.5%, followed by Malay, 38% and Indian, 7.5%. However, the sample was not really representative of the racial composition of the population in the Kuala Lumpur and Petaling Jaya, with 41.7% of the population being Malay, followed closely by the Chinese, 39.7% and Indian, 18.6% (Universe Report 1999, Retail Measurement Services by ACNielsen). This might be due to the data collection procedure which was based on convenience sampling, a non-probability sampling.

In terms of age, the largest group of the respondents was in the 20 - 24 year age group, representing 36.7% of the sample, followed by age group of 25 - 29 (26.3%) and 30 - 34 (16.6%). More than half or 65.6% of the respondents are single, while 32.8% are married. This is consistent with the age group where majority of respondents were young with the range of 20 - 29 years age group.

Education wise, 37% of respondents possessing Degree/Professional qualification, 26.3% have SPM/MCE/SPVM and 23.7% received education up to STPM/HSC/Certificate/Diploma level.

In line with the age group for the sample size, it is not surprising that majority of the respondents; about 29.5% are students (currently pursuing their Degree program). 22.7% of respondents are in clerical position and is also consistent with the education level of SPM/MCE/SPVM (26.3%). In addition, 20.1% of respondents are in executive level and is consistent with the Degree qualification (37%).

Consistent with the education level and type of occupation, about one third of the respondents, 30.2% earned a personal income in the range of RM1,000 - RM1,999 monthly.

Table 6: Demographic Profile of the Respondents

	Frequency	Percentage
Ethnic group		
Malay	117	38.0
Chinese	168	54.5
Indian	23	7.5
Total	308	100.0
Age		
15 - 19 years	18	5.8
20 - 24 years	113	36.7
25 - 29 years	81	26.3
30 - 34 years	51	16.6
35 - 39 years	45	14.6
More than 39 years	0	0.0
Total	308	100.0
Marital status		
Single	202	65.6
Married	101	32.8
Divorced	3	1.0
Widowed	2	0.6
Total	308	100.0
Education		
Primary to lower secondary	17	5.5
SPM/MCE/SPVM	81	26.3
STPM/HSC/Certificate/Diploma	73	23.7
Degree/Professional	114	37.0
Master/Ph. D	23	7.5
Total	308	100.0
Occupation		
Student	91	29.5
Housewife	14	4.5
Clerical	70	22.7
Supervisor	24	7.8
Executive	62	20.1
Managerial	11	3.6
Professional	25	8.1
Self-employed	11	3.6
Total	308	100.0
Personal income per month		
Less than RM1,000	37	12.0
RM1,000 – RM1,999	93	30.2
RM2,000 – RM2,999	64	20.8
RM3,000 – RM3,999	14	4.5
RM4,000 – RM4,999	11	3.6
More than RM4,999	8	2.6
Not working	81	26.3
Total	308	100.0

Characteristics of Hair

Table 7 highlights the characteristics of respondents' hair. In terms of length of hair, majority of respondents (41.2%) have medium length hair. This may be due to the weather condition in Malaysia which does not encourage long hair. This is then followed by long hair (32.5%) and short hair (26.3%). Most of respondents claimed that they have straight hair (68.5%), followed by wavy hair (19.2%) and curly hair (12.3%).

Table 7: Hair Characteristics

	Frequency	Percentage
Length		
Long	100	32.5
Medium	127	41.2
Short	81	26.3
Total	308	100.0
Style		
Straight	211	68.5
Curly	38	12.3
Wavy	59	19.2
Total	308	100.0
Condition		
Dry	80	26.0
Normal	189	61.4
Oily	39	12.7
Total	308	100.0
Texture		
Hard	29	9.4
Medium	168	54.5
Soft	111	36.0
Total	308	100.0
Permed		
Yes	48	15.6
No	260	84.4
Total	308	100.0
Colored		
Yes	76	24.7
No	232	75.3
Total	308	100.0

In addition, majority of respondents have normal hair (61.4%), followed by dry hair (26%) and oily hair (12.7%). In terms of texture of hair, 54.5% of respondents mentioned that they have medium texture, 36% of respondents have soft texture and only 9.4% of respondents have hard texture (Table 7).

About 84.4% of respondents did not perm their hair and only 15.6% of respondents permed their hair. Moreover, 75.3% of respondents did not color their hair and only minority of them (24.7%) colored their hair.

Unaided Brand Awareness

Table 8 shows the results of unaided brand awareness in which respondents were required to state the first brand that come to mind when the word "shampoo" is mentioned. 30.8% of respondents mentioned that they are aware of Pantene, followed by Rejoice (19.8%). This is consistent with the position of hair shampoo market share where Pantene (15.1%) has been the market leader followed by Rejoice (12.1%). Meanwhile, Organics scored 8.4%, followed by Head & Shoulders (6.2%), Follow Me (4.5%) and Sunsilk (4.2%). JC, Optima and Zotos have the least first mention unaided brand awareness, indicating that they are not the key players in hair shampoo industry.

At a minimum, a company wants its brand to be a part of every consumer's awareness set, for if consumers are unaware of a brand, they will not consider it. A company also wants its brand to be part of the consumer's consideration set rather than the inert or, worse still, the inept set.

Table 8: Unaided Brand Awareness (First Mention)

	Frequency	Percentage
Pantene	95	30.8
Rejoice	61	19.8
Organics	26	8.4
Head & Shoulders	19	6.2
Follow Me	14	4.5
Sunsilk	13	4.2
Kao Merit	12	3.9
Clairol	10	3.2
Vidal Sassoon	9	2.9
Wella	9	2.9
New & Trendy	6	1.9
Johnson & Johnson	5	1.6
Lavenus	5	1.6
Ginvera	4	1.3
Sifone	4	1.3
Shurei	3	1.0
Kao Feather	3	1.0
Loreal	3	1.0
Revlon	2	0.6
Gervenne	2	0.6
JC	1	0.3
Optima	1	0.3
Zotos	1	0.3
Total	308	100.0

Table 9 shows the results of total mentions unaided brand awareness in which respondents were required to state other brands that they can think of when the word "shampoo" is mentioned. Both Pantene and Rejoice have the highest total mentions unaided brand awareness at 15.4% respectively, followed by Organics and Sunsilk at 8.3% respectively. Again, this indicates that Pantene and Rejoice have strong brand recall. This finding is in consistent with Pantene, Rejoice, Organics and Sunsilk television advertising strategy, which is aired frequently during prime time. Their advertisement concept addressed promptly consumers problem recognition. In the problem recognition stage, consumers recognize that they have a need for something and the need motivates consumers to the search for information.

Table 9: Unaided Brand Awareness (Total Mentions)

	Frequency	Percentage
Pantene	104	15.4
Rejoice	104	15.4
Organics	56	8.3
Sunsilk	56	8.3
Follow Me	51	7.6
Head & Shoulders	43	6.4
Kao Merit	42	6.2
Johnson & Johnson	41	6.1
Vidal Sassoon	30	4.5
Clairol	24	3.6
Ginvera	23	3.4
Sifone	19	2.8
New & Trendy	15	2.2
Wella	9	1.3
Lavenus	8	1.2
Gervenne	7	1.0
Shurei	7	1.0
JC	6	0.9
Kao Feather	6	0.9
Palmolive	6	0.9
Zaitun	4	0.6
Tracia	3	0.4
Loreal	2	0.3
Sassy	2	0.3
VO 5	2	0.3
Vosene	2	0.3
Optima	1	0.1
Revlon	1	0.1
Total	674	100.0

In line with the unaided brand awareness, it is not surprising that most of the respondents; about 24.3% currently use Pantene, followed by Rejoice, 18.2%, Organics, 11.6%, Head & Shoulders, 6.4% and Sunsilk, 6.1% (Table 10).

Table 10: Brand Used Currently

	Frequency	Percentage
Pantene	80	24.3
Rejoice	60	18.2
Organics	38	11.6
Head & Shoulders	21	6.4
Sunsilk	20	6.1
Clairol	13	4.0
Ginvera	12	3.6
Vidal Sassoon	9	2.7
Follow Me	9	2.7
Johnson & Johnson	9	2.7
Others	58	17.6
Total	329	100.0

In line with the unaided brand awareness and brand of hair shampoo currently used, it is not surprising that most of the respondents, about 27.9% used Pantene most often, followed by Rejoice, 18.2%, Organics, 9.4%, Head & Shoulders, 5.8% and Sunsilk, 4.9% (Table 11).

This finding suggests there is no way to sustain growth in this highly competitive hair industry without making significant investments in advertising on a continual basis. In addition, television advertising should be supported by a strong sales promotion effort. For example, a celebrity endorser is used as the unconditioned stimulus in television advertising; his or her picture should be prominently paired with the product in point of purchase displays. Moreover, particularly in television commercials, the product and the unconditioned stimulus should stand out from the background of the advertisement as well as from the clutter of competing advertisement. Excellent examples of television advertisement execution can be seen from Pantene, Rejoice, Organics and Sunsilk.

Table 11: Most Often Used Brand

	Frequency	Percentage
Pantene	86	27.9
Rejoice	56	18.2
Organics	29	9.4
Head & Shoulders	18	5.8
Sunsilk	15	4.9
Clairol	11	3.6
Follow Me	10	3.2
Wella	9	2.9
Kao Merit	9	2.9
Ginvera	8	2.6
Vidal Sassoon	8	2.6
Others	49	15.9
Total	308	100.0

Usage Patterns

Product usage involves the actions and experiences that take place in the time period in which a consumer is directly experiencing a product. Consumers may not always use products in the ways expected by manufacturers. Hence, it is vital for marketers to identify their usage patterns.

Table 12 shows that 47.4% of respondents used 2 in 1 hair shampoo to wash their hair. This may be due to convenient usage where users only need to wash their hair once. Results had also shown that 32.1% of respondents used hair shampoo and hair conditioner separately. This is to soften their hair texture and it is consistent with the hair texture of respondents where 54.5% of respondents have medium hair texture (Table 7). As a result, they need hair conditioner to soften their hair.

In terms of frequency of hair wash, most of respondents washed their hair 3 - 4 times a week (58.4%), followed by everyday (25.3%). This is consistent with the hair length of respondents (Table 7) where majority of them have medium hair (41.2%) and long hair (32.5%). Hence, they need to wash their hair frequently in order to keep their scalp clean and the hair healthy looking.

Table 12: Usage Patterns

	Frequency	Percentage
Types of product used currently		
Hair shampoo only	52	16.9
2 in 1/All in 1 hair shampoo	146	47.4
Separate hair shampoo & hair conditioner	99	32.1
Separate hair shampoo & hair treatment	11	3.6
Total	308	100.0
Frequency of hair wash		
Everyday	78	25.3
5 - 6 times a week	33	10.7
3 - 4 times a week	180	58.4
Less than 2 times a week	17	5.5
Total	308	100.0
Shared usage		
Yes	150	48.7
No	158	51.3
Total	308	100.0
Shared usage among members		
Family members	152	95.6
Friends	7	4.4
Total	159	100.0
Duration of usage for Most Often Used Brand		
Less than 1 year	52	16.9
1 – 2 years	133	43.2
3 – 4 years	73	23.7
More than 4 years	50	16.2
Total	308	100.0

Results also shows that 51.3% of respondents did not share their brand of hair shampoo while 48.7% of respondents shared hair shampoo (Table 12). Among the respondents who shared their hair shampoo, majority of respondents shared their brand together with family members (95.6%), followed by friends (4.4%). This sharing pattern indicates that most of respondents shared their hair shampoo among household members. Hence, hair shampoo can be positioned as household product.

Table 12 indicates most of the respondents are loyal to their most often used brand. 43.2% and 23.7% of respondents continued with the brand for a period of 1 – 2 year and 3 - 4 years respectively. About 16.9% of respondents who use their most often brand for less than one year are those who made purchases based on impulse and those who seek variety. Variety seeking occurs when respondents switch brands simply because they are bored with their old brand and feel stimulated by the prospect of a new one. In addition, consumers frequently switch brands, even when they are not unhappy with the brand they previously used. The phenomenon seems to occur most frequently with low-involvement products in which there is little difference between brands. Consumers may switch brands because they have thoroughly adapted to the one they are used to buying and are susceptible to a new stimulus.

Hair Problems/Types of Hair Problems

Result shows that only 22.1% of respondents faced hair problems. Table 13 summarizes top five hair problems faced by respondents. About 31.9% of respondents are facing dandruff problem, followed by dry hair problem (18.6%), hair drop problem (12.4%), itchy scalp problem (11.5%) and split end problem (8.0%).

This information is vital to the manufactures as well as marketer. Manufacturers should utilize this data to formulate their new or improved hair shampoo to tackle consumers problems and marketer should position and differentiate their product according to consumers' needs and wants.

Table 13: Types of Hair Problems

	Frequency	Percentage
Dandruff	36	31.9
Dry hair	21	18.6
Hair drop	14	12.4
Itchy scalp	13	11.5
Split end	9	8.0
Others	20	17.7
Total	113	100.0

Product Performance Evaluation

Table 14 shows that out of the twelve product attributes related to product performance evaluation, two are found to be rather important. They are refreshes after shampooing (mean = 4.12) and cleansing ability (mean = 4.11). The attributes that are rated least in performance are leaves hair shiny (mean = 3.56) and prevent dandruff (mean = 3.69).

The results indicate that majority of respondents' most often used brand can not deliver the shiny hair attribute. Hence, there is an opportunity for manufacturer to look into this aspect.

In addition, respondents' evaluation on their most often used brand against dandruff problem are poor. This is due to majority of respondents' most often used brand are Pantene (27.9%) and Rejoice (18.2%) where both brands' main product attribute are not meant for preventing dandruff (Table 11).

Table 14: Product Performance Evaluation by Ethnic Groups*

	Total		Malay		Chinese		Indian		Sig.**
	Mean	Std. Dev.	Mean	Std. Dev.	Mean	Std. Dev.	Mean	Std. Dev.	
Refreshes after shampooing	4.12	0.73	4.23	0.65	4.04	0.80	4.09	0.42	0.094
Cleansing ability	4.11	0.66	4.13	0.60	4.07	0.71	4.35	0.57	0.148
Leaves hair manageable	3.99	0.79	4.20	0.65	3.86	0.87	3.96	0.71	0.002
Easy to rinse	3.98	0.74	4.20	0.56	3.81	0.81	4.17	0.65	0.000
Leaves hair soft	3.98	0.79	4.12	0.71	3.88	0.86	4.09	0.60	0.030
Leaves hair smooth	3.93	0.76	4.09	0.69	3.82	0.79	3.96	0.71	0.012
Pleasant fragrance	3.88	0.83	4.13	0.80	3.68	0.82	4.00	0.60	0.000
Amount of lather	3.81	0.74	4.05	0.58	3.65	0.77	3.78	0.90	0.000
Stops itchy scalp	3.74	0.94	3.83	0.95	3.65	0.97	3.91	0.67	0.204
Prevents hair damage	3.70	0.91	3.76	0.87	3.64	0.94	3.78	0.95	0.506
Prevents dandruff	3.69	0.96	3.74	0.96	3.65	0.99	3.70	0.70	0.757
Leaves hair shiny	3.56	0.93	3.79	0.85	3.38	0.94	3.70	0.97	0.001

* The mean scores are based on a scale of 1 to 5, in which "1 = Poor" and "5 = Excellent." The higher the mean score, the better the respondents rate the product attributes.

** Level of significance using ANOVA tests.

Table 14 also summarizes the mean scores of product performance evaluation by ethnic groups. The ANOVA tests are statistically significant for seven out of the twelve product performance attributes. The items for leaves hair manageable, easy to rinse, leaves hair soft, leaves hair smooth, pleasant fragrance, amount of lather and leaves hair shiny are significant at $p <= 0.05$. Ethnic wise, the Malays have the highest means on product performance attributes. Among the seven product performance attributes, the degree of differences between the Malay, Chinese and Indian respondents are greatest among easy to rinse, pleasant fragrance and the amount of lather. For others product attributes, no significance are found.

Purchase Patterns

Closely related to consumers' actual purchase behavior is the purchasing pattern. From the marketer perspective, the purchasing pattern can further enhance their understanding towards consumer behavior.

Table 15: Purchase Patterns

	Frequency	Percentage
Action taken if most often used brand not available		
Another outlet, same brand & pack size	96	31.2
Same brand but different pack size	99	32.1
Same brand but different type	11	3.6
Another brand	56	18.2
Same brand and pack size, next shopping trip	46	14.9
Total	308	100.0
Purchase channel		
Supermarket	223	72.4
Hypermarket	41	13.3
Modern pharmacy/drugstore	24	7.8
Chinese Medical Hall	6	1.9
Convenience store	7	2.3
Provision/sundry shop	7	2.3
Total	308	100.0

Table 15 shows that 32.1% of respondents decide that if their most often used brand is not available at the point of purchase, they will buy the same brand but of different pack size. Another 31.2% of respondents will look for the same brand and pack size in another outlet. As for purchasing channel, majority of respondents selected the supermarket channel (72.4%), followed by the hypermarket (13.3%).

Decision Maker

Study also shows that 92.5% of respondents make their own decision on the brand of hair shampoo and only 7.5% of respondents depend on others. For respondents who are not decision makers, majority of them mentioned that family members (43.5%) would decide for them, followed by friends (43.5%) and promoters (13%).

Factors that Influence Consumers' Choice of Hair Shampoo & Its Relative Importance

Table 16 shows that out of the sixteen factors influencing consumer's choice of hair shampoo, seven are found to be rather important: product quality (mean = 4.64), natural ingredients (mean = 4.40), value for money (mean = 4.31), easy access/available (mean = 4.30), reasonable price (mean = 4.29), nice fragrance (mean = 4.09) and trust worthy brand (mean = 4.04).

The factors that are rated least in importance are recommendation by sales promoters (mean = 2.64) and try new brand (mean = 2.96). Only a mere 13% of respondents depend on promoters to make their decision. This is because hair shampoo is a low-involvement product where most of respondents do not require additional knowledge from sales promoters and most of them are loyal to their most often used brand with 43.2% of respondents have been using their most often used brand for 1 – 2 years (Table 12).

Table 16: Factors that Influence Consumers' Choice of Hair Shampoo by Ethnic Groups*

	Total		Malay		Chinese		Indian		Sig.**
	Mean	Std. Dev.	Mean	Std. Dev.	Mean	Std. Dev.	Mean	Std. Dev.	
Product quality	4.64	0.73	4.67	0.67	4.59	0.79	4.87	0.46	0.197
Natural ingredients	4.40	2.45	4.37	0.62	4.39	3.27	4.70	0.70	0.836
Value for money	4.31	0.78	4.50	0.62	4.15	0.83	4.48	0.85	0.001
Easy access/available	4.30	0.80	4.44	0.70	4.20	0.84	4.39	0.89	0.037
Reasonable price	4.29	0.76	4.41	0.66	4.18	0.79	4.39	0.94	0.038
Nice fragrance	4.09	0.84	4.40	0.73	3.83	0.85	4.43	0.51	0.000
Trust worthy brand	4.04	0.97	4.18	0.86	3.88	1.02	4.43	0.90	0.004
Promotion/offer	3.86	1.10	3.94	1.02	3.77	1.16	4.13	1.06	0.205
Display in shops	3.85	1.05	3.97	1.07	3.72	1.04	4.26	0.92	0.023
Free sample	3.51	1.23	3.75	1.17	3.36	1.23	3.30	1.36	0.022
Recommendation by friends/family members	3.48	1.09	3.19	1.14	3.61	0.99	4.00	1.21	0.000
Corporate image	3.46	1.19	3.44	1.32	3.40	1.09	4.00	1.09	0.073
Advertising	3.36	1.12	3.59	1.08	3.17	1.12	3.57	1.08	0.004
Attractive packaging/design	3.19	1.12	3.30	1.17	3.08	1.09	3.43	1.04	0.154
Try new brand	2.96	1.05	2.88	1.04	3.02	1.04	2.96	1.15	0.525
Recommendation by sales promoters	2.64	1.13	2.48	1.10	2.72	1.06	2.87	1.58	0.121

* The mean scores are based on a scale of 1 to 5, in which "1 = Not important at all" and "5 = Very important." The higher the mean score, the better the respondents rate the product attributes.

** Level of significance using ANOVA tests.

Table 16 also summarizes the mean scores for factors influencing consumers' choice of hair shampoo by ethnic groups. The ANOVA tests are statistically significant for nine out of the sixteen factors. The factors like value for money, easy access/availability, reasonable price, nice fragrance, trust worthy brand, display in shops, free sample, recommendation by friends/family members and advertising are significant at p <= 0.05. The results indicate that the Malay respondents seemed to emphasize more on value for money, easy to access/availability, reasonable price, free sample and advertising when compared to the Chinese and Indian respondents. On the other hand, the Indian respondents seemed to focus on nice fragrance, trust worthy brand, display in shops and recommendation by friends/family members. Of these nine factors, the degree of differences between the Malay, Chinese and Indian respondents are greatest among nice fragrance and recommendation by friends/family members. No significant differences are found for the other product attributes.