

Shampoo in China: Development, Consumerism, and Modernity

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500元

联想 LEGEND

风景 去屑不伤发

风景

59元





我的早餐

三文治 盒饭 汉堡

我的早餐 在好德

三文治 盒饭 汉堡

我的早餐 在好德

三文治 盒饭 汉堡

乳制品 熟食品 盒饭 饮料

3.50元

21.00

好方便 好德好方便 好德好方便 好德好方便 好德好方便

纯棉系列



The Problem

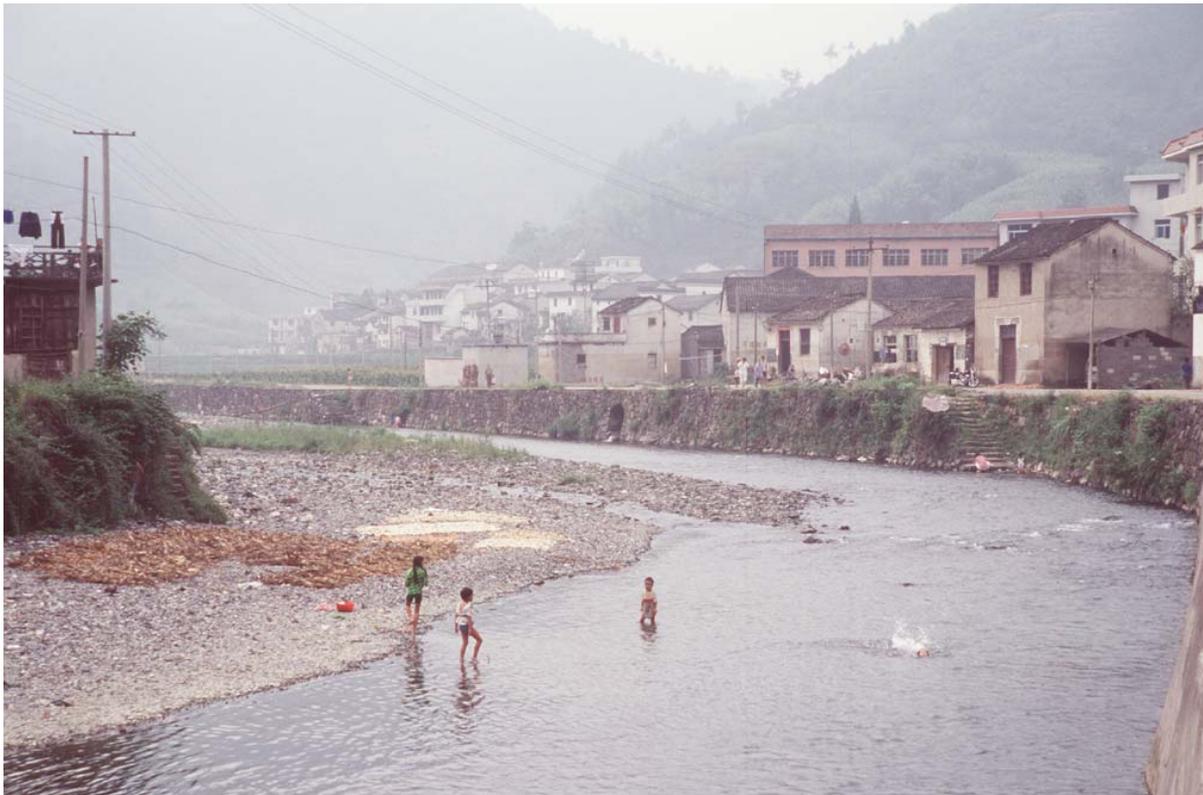
- Huge store displays: merchandise and ads. Why so prominent?
- 4 RMB for local brands vs 17-25 RMB for foreign: Why are people willing to pay a premium for fancy soap and shampoo, when only the user knows what type of soap he/she has used?
- Worker who spent 17 RMB of 200 monthly salary on shampoo. What's in bottle?
- Environmental crisis caused by consumer capitalism: What drives consumption?

Fieldwork



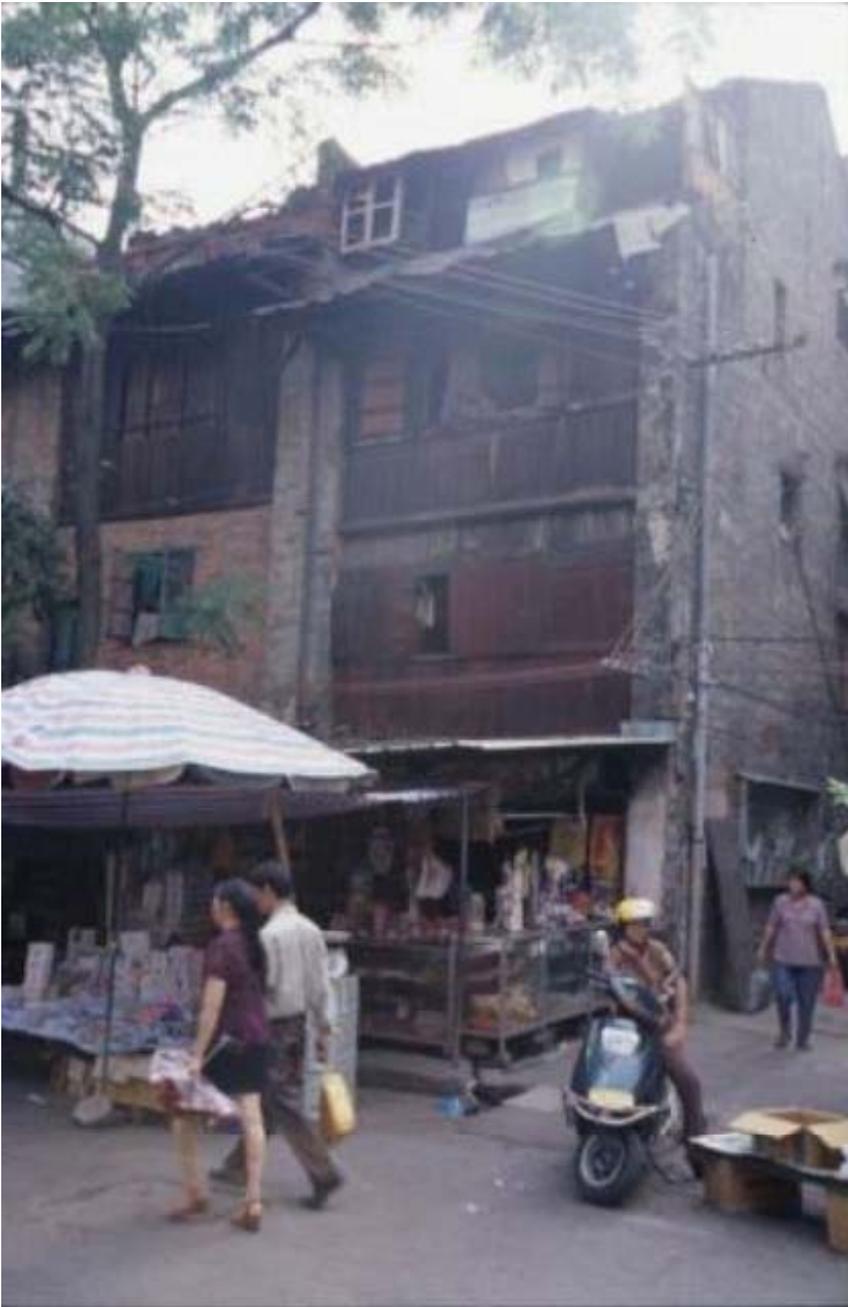


Shanghai/Zhejiang





Guangxi





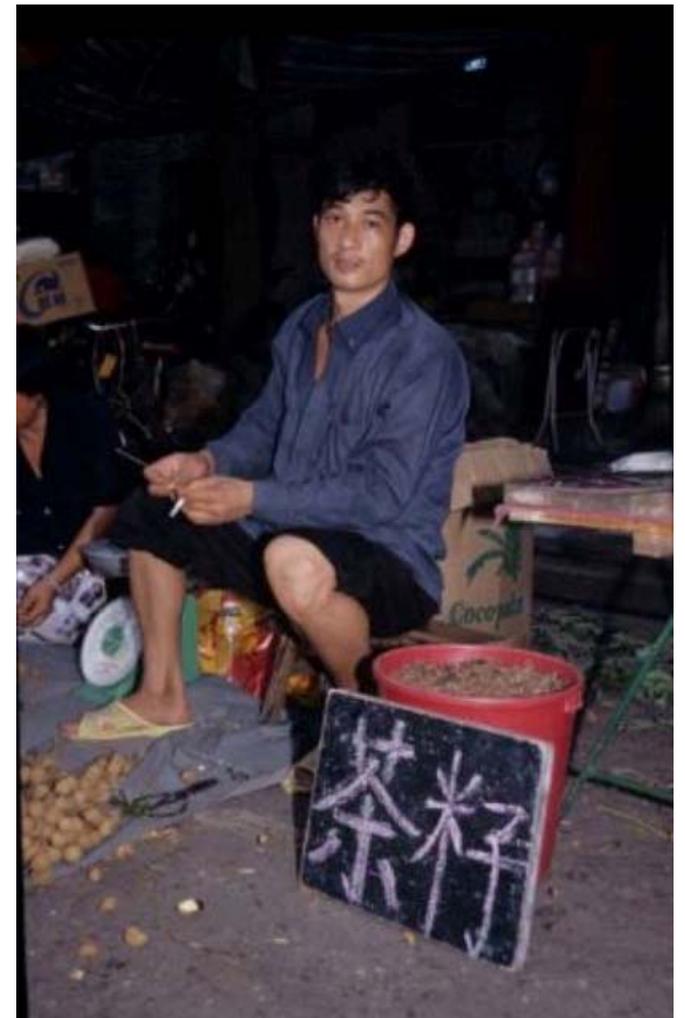


Assumption would find a counter-discourse

- Expected older residents to criticize the youth's profligate spending
 - Not so; only one crank
 - Various answers:
 - young people care/know about these things
 - this is the modern way
- Did find nostalgia for old ways

Non-soap cleansers in South China

- saponaceous plants:
 - *zaojiao* 皂角 Chinese honey locust
- alkali:
 - *chazi* 茶仔/茶籽 “tea fruit”
- Shampoo more convenient (though some said old ways gave better results)
 - blacker and shinier 黑亮



Shampoo

- Previous use of soap 肥皂; rationed.
- Toilet soaps 香皂 and shampoos arrive in '80s
- 洗发水, 洗发露, 香波, 洗发液, 洗发精



2003 Shampoo sales by volume

Source: A.C. Nielson

Rejoice	飘柔	13.7	Ke Meng	可蒙	1.8
Pantene	潘婷	5.5	Olive	奥妮	1.1
H&S	海飞丝	7.0	Laifa (Slek)	丽花丝宝书	6.7
Vidal Sassoon	沙宣	1.6	Lafang	拉芳	3.7
Ascend	润妍	0	Jia Yan	嘉颜	1.8
Clairol	伊卡璐	1.4	Houdy	好迪	1.4
Kao Sifon	花王诗芬	1.7	Shine	飘影, 碧爽	1.2
Kao Feather	花王飞逸	0.7	Top		1.1
Lux	力士	1.6	Ai Ni	爱妮	0.7
Hazeline	夏士莲	4.5	Dailisi	雅倩黛丽丝	1.2
Seagull	海鸥	1.8	Qiu Pai		0.7
Bee&Flower	蜂花	2.0	Other brands		36.7
			TOTAL		99.6

Other brands

- 亮庄
- 依卡璐
- 名人
- 多芬
- 天丽
- 柏丽丝
- 柔然
- 梦思
- 棕榄美之选
- 海涛
- 润发一百年
- 特乐
- 田田珍珠
- 绮梦
- 采诗
- 黑得快
- 舒婷 (fake 舒蕾)
- 拉芬 (fake 拉芳)

Major foreign companies

- P&G 29.2
- Unilever 6.1
- Kao 2.4
- Johnson 1.8
- Total 39.5

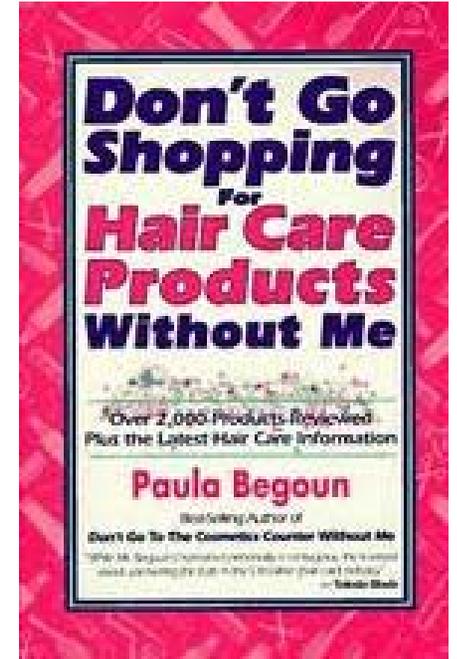
Consumer Reports

- Very little difference between brands
- Recommend choosing on price and smell
- Not entirely true in China
 - Differences in quality
 - Some are harsh, no emulsifiers or conditioner
 - But all major brands are fine



Beauty Experts

- Note differences, but are critical
- Paula Begoun
 - Many “natural” products use peppermint, which is a skin irritant
 - “The number of new product lines emerging every day is sheer madness” (p. 4)
 - “there are only a handful of effective ingredients available to hair-care chemist”



Simple technology

- In factory interviews, consistently told
 - simple chemical and manufacturing process
 - all use the same/similar chemicals
 - surfactants (detergent and foam enhancer)
 - thickeners, stabilizers, and preservatives
 - conditioning agents
 - coloring agents
 - expensive ingredient is “essential oils”

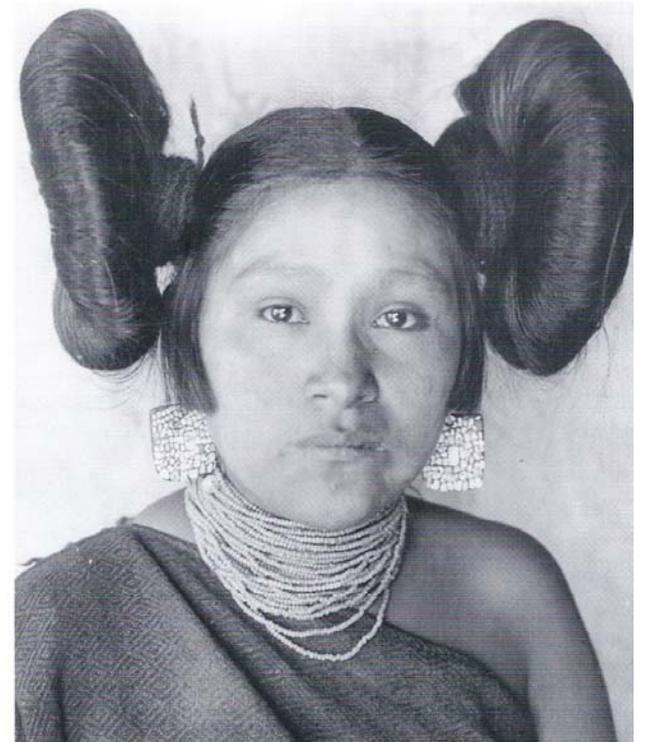
Hair and Culture

- 19th Century US & Britain:
 - monthly washing and bathing
 - home-made soap
 - increase use of soap because of industrial soot and grime, cheap oils from imperial plantations, and industrial manufacturing
- Oiled hair, pompadour, covered: there is nothing “natural” about current styles



Hair symbolism

- Nearly universally meaningful
- Culture-specific meanings
- Universal meanings
 - Health
 - Short hair: control, discipline (e.g. monks and nuns)
 - Long hair:
 - Men: often beyond what accepted, rebellious
 - Women: nearly universally considered attractive

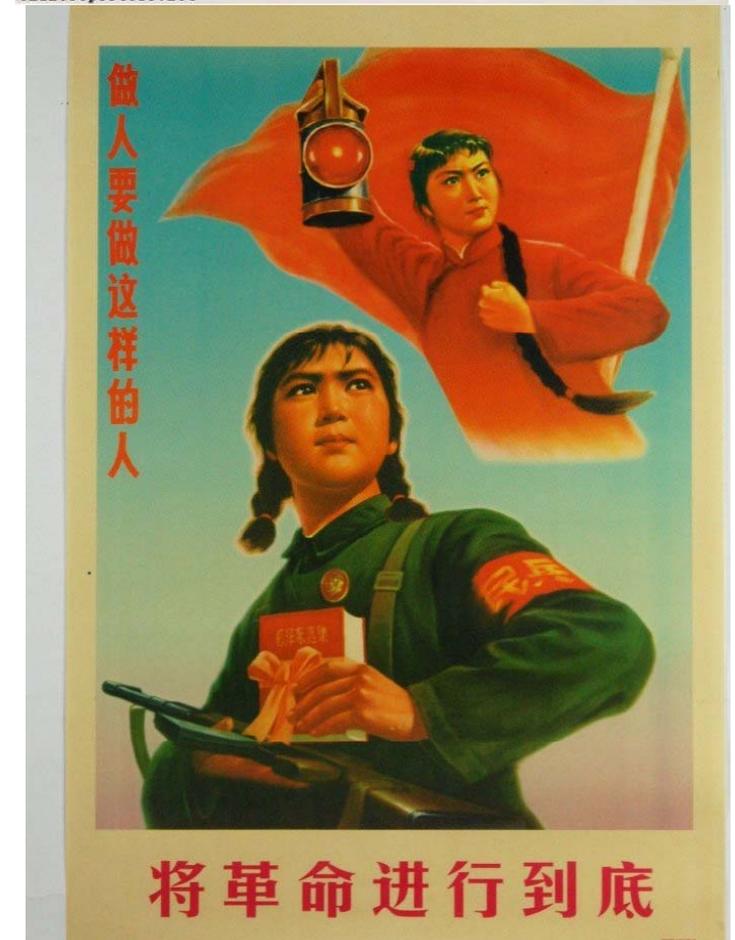


Hygiene and Cleanliness

- Large cultural aspect
- “cleanliness”
 - dirt as matter out of place; depends on one’s expectations: body odor
 - nationalists’ association of sanitation and hygiene practices with national rejuvenation and invigorated populace

Change in hairstyle

- Long hair (precious legacy of parents)
- Post-1949: short hair, and braids
- Post-reform: long, flowing hair for young women



“Modern Western Style” — Disney’s Pocahontas



How Chinese were led to want shampoo

- New products as examples of modernity
 - Higher rates of body wash vs bar soap
- Social pressure
 - at margins: schools
 - more important is creating internal desire to be modern and beautiful, and fear of *faux pas*
- Marketing

Bee & Flower 蜂花

- Early brand 名牌
- Low cost
- Conditioner especially popular
- Bad shelf positioning
- Risk if advertize
- FMCG: Fast Moving Consumer Goods





Pay for shelf
space

Sachets

- Single use
- Used by laborers and travelers
- Small luxury attainable to most



Advertising: Rejoice Ad



Rejoice

- Emphasis on function: convenience, and silky and smooth hair
- Was first true 2-in-1 shampoo with conditioner
 - Used silicon and gum; developed in 1986
 - *Consumer Reports* (US) 1989: “The *Pert* shampoos caused the least tangling, so wet hair was easy to comb. But even the poorest performers didn’t cause undue tangling. With all the shampoos, the panelists’ hair felt quite silky and was fairly easy to comb when dry. Hair washed in the *Pert* products felt very silky and was even easier to comb.”

Advertising: Pantene Ad



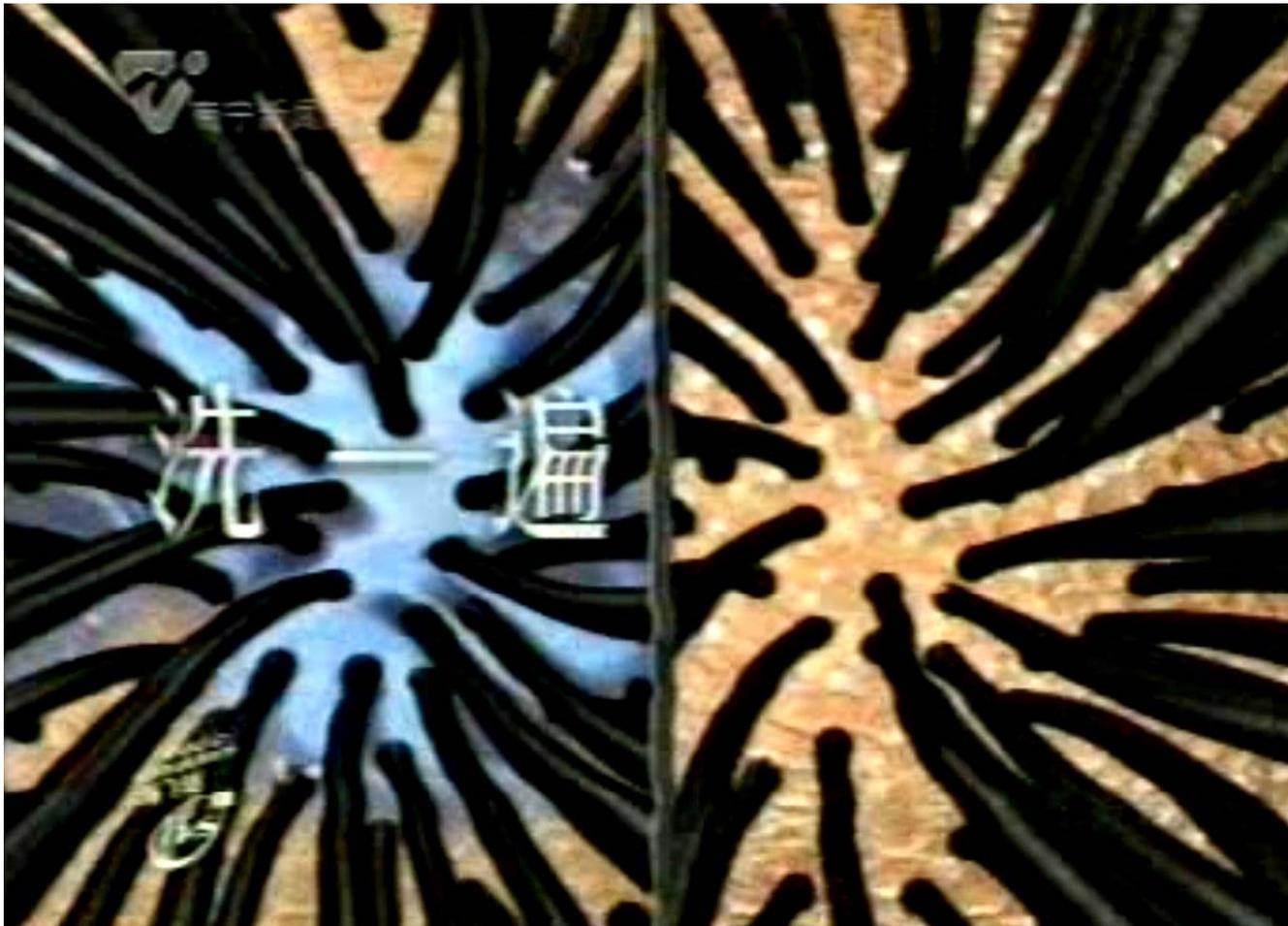


P&G Brands

- Early joint venture—1988
 - Link between hygiene and nationalism
- Ads even earlier
- Local brands localize
 - Chazi, Juyou, packaging like medicine
- See brands as Chinese brands



Teaching Consumers about Dandruff: H&S Ad





Safeguard 舒肤佳

- Shape of tablet
- “Conceptual ingredient”
- Need to keep “fresh”



How create demand

- In addition to good products:
 - Illusion of science and false functions
 - Create needs (“anti-bacterial”)
 - Desirability
 - Remind consumer of your brand (not aware of how have image of “big brands”)
 - Placement in store

P&G feels constantly under siege

- Innovations by competitors
- Changing consumer tastes

La Fang 5 second spot



4041



啼笑因缘

亮莊
洗发露

PHILIPS

Rejoice vs Puyen

飄柔 vs 飄影

- 陋野



La Fang and fakes





Emphasis on Individual

- Individual choice
- Individual preferences
- Individual hair characteristics
 - Contrast to collective period
- Pursuit of novelty
- Build on folk concepts of hygiene
 - Shower gel, bath foam 沐浴露，淋浴液
- Choice or irresistible force?

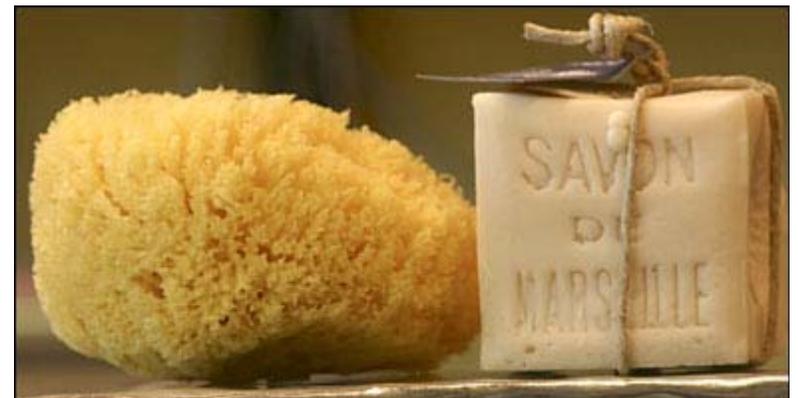


Modernity

- Seeking a better life
 - Commercials among earliest to portray “the good life” (“Chinese dream”)
 - Enjoy feeling sophisticated
- Double edged phenomenon
 - Positive
 - Negative: poisonings, pollution
 - Advice to change brands frequently

Fear of modernity

- Can't tell real from fake
 - Some can, but not until arrive home
 - Most admitted could not tell
 - Buy in supermarkets for guarantee is real
- Artisanal and health movement in industrial countries



Development



- Not simply progress:
 - Represented as progress
 - Promote increase use
 - Assumptions about goal
 - Flowing, silky hair
 - Modernist narrative as dubious theoretical model
- Evolving, cultural system
 - Ecology of brands; positioning
 - Made culturally real and important
 - Modernist narrative as indubitable ethnographic fact

Market Segmentation

- Coastal cities are like HK; inland consumers seek more functional benefits
- P&G needs to sell to beyond premium segment
- Offer a “different” product, not cheaper one
 - “The secret is to have, for each segment, a position that is tangibly different so you do not cannibalize your higher-priced products.”
Laurent Philippe, President P&G Greater China

Branding

- Only way to avoid product being a “commodity” (i.e. low profit margin)
- Sell an image: there *is* more than shampoo in the bottle
- Consumers seem to want that: are willing to pay
- But requires constant advertizing and brand management: do consumers really have agency? (Neoliberal illusion)

Conclusion: Environmental Impact

- What does the rapid adoption of shampoo in China tell us about consumerism and the prospects for sustainable development?
- Shows power of marketing
 - Consumers are complicit
- What is alternative? Planned economy could not even provide soap
- But what will our grandchildren say?

Questions?