



Heads Up, Australia!

A national Australian survey examining
the emotional and social toll of dandruff

Quantitative Research Report
January 2026 conducted by Edelman Data and Intelligence.

Sponsored by Key Pharmaceuticals.

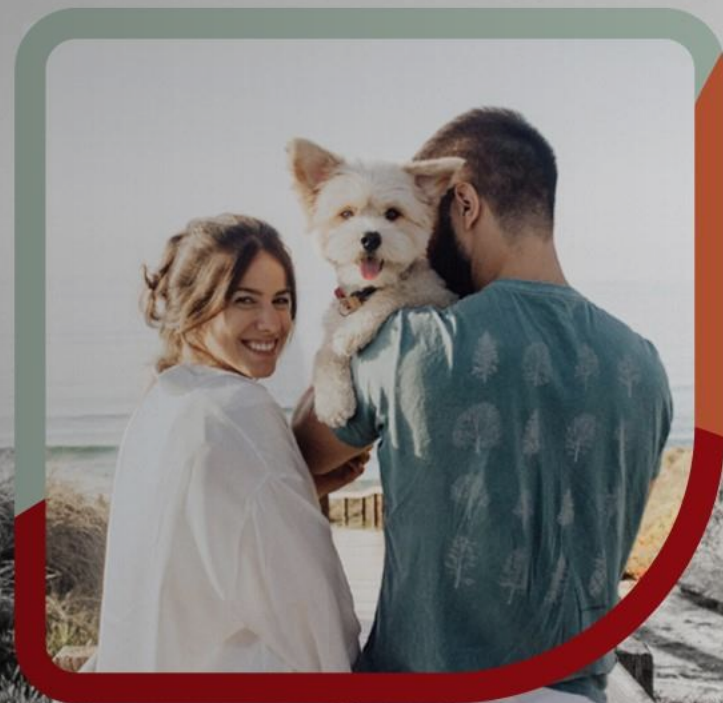


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Background, Objectives & Methodology

Background & Objectives

Dandruff related anxiety is underplayed and overlooked. With the lack of a long-term fix, the emotional toll on people's confidence is ignored. Simultaneously, pharmacists perceive dandruff as cosmetic, not clinical, and remain underutilised as allies in driving scalp health conversation.

Nizoral commissioned the first national study into the emotional and social toll of dandruff in Australia – unpacking the stigma, self-esteem cost and the ripple effects on relationships, work and mental health. The objective of this research was to generate real-world insights that help reframe dandruff as scalp health, shifting it from a taboo to a part of overall wellbeing.

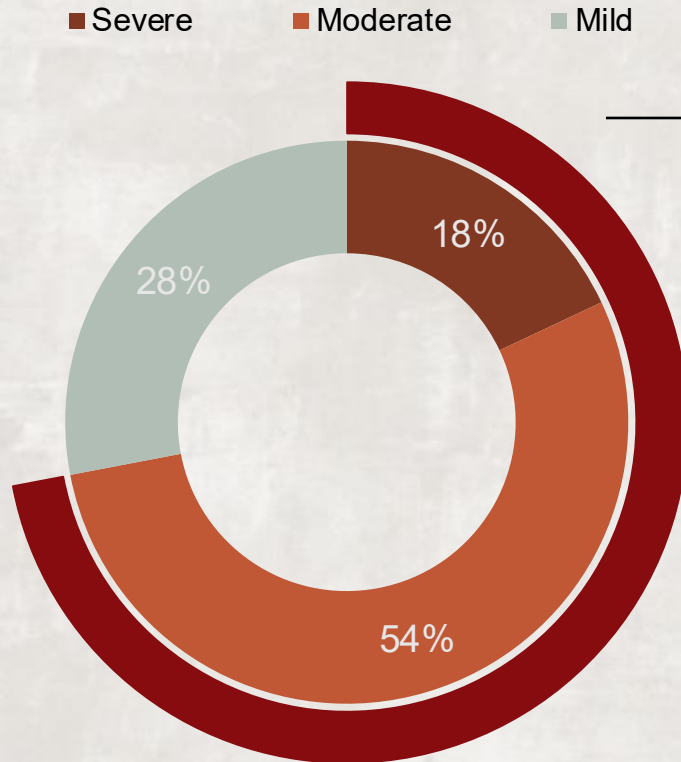
Methodology

Country	<ul style="list-style-type: none">• Australia
Letter Of Intent	<ul style="list-style-type: none">• 15 minutes, online self-complete survey
Respondent Criteria	<ul style="list-style-type: none">• N=1,069 Australians between 18 and 59 years old• Living in Australia• Those who currently experience dandruff or flaking symptoms, or experienced symptoms in the past 6 months
National Representation Quotas	<ul style="list-style-type: none">• Gender• Age• Region
Key Quotas	<ul style="list-style-type: none">• Minimum N=300 moderate/severe dandruff sufferers
Additional Quotas (best efforts)	<ul style="list-style-type: none">• Lapsed/managed dandruff sufferers (i.e. experienced symptoms in the past 6 months, now under control)• Actively using products to manage their dandruff or flaking symptoms• Parents who purchase anti-dandruff products on behalf of their children

The Hidden Emotional Cost of Dandruff

Among those living with dandruff, almost 3 in 4 say they experience moderate-to-severe symptoms.

Dandruff severity:
% who experience



72% currently experience, or recently experienced, moderate-to-severe dandruff.

Dandruff severity was determined based on two factors:

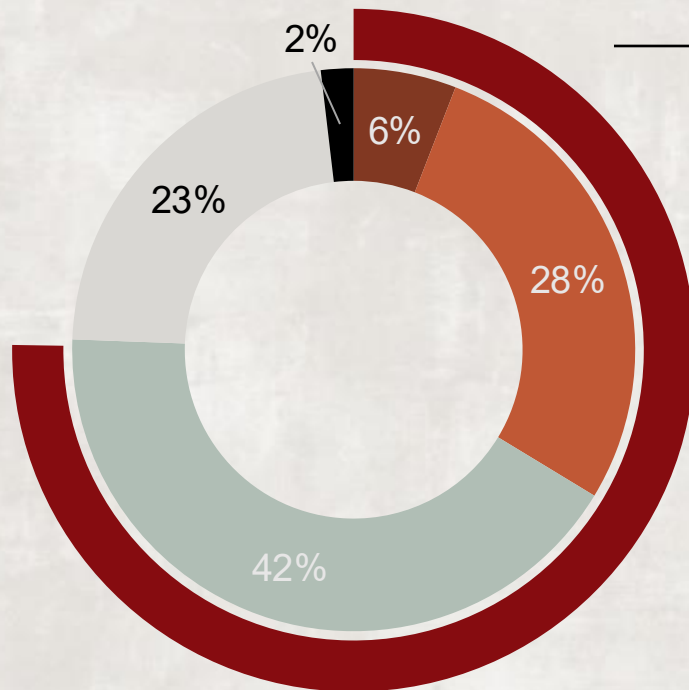
- **Visibility of flakes:** from never/almost never seeing flakes to constantly seeing flakes on shoulders/clothing or falling from scalp.
- **Self-perceived dandruff severity:** from little negative impact on everyday life to being actively disrupted and negatively impacted in everyday life.

Key Pharma Nizoral Research Study 2026 | Dandruff severity is based on: S6. At their worst, how visible are your dandruff or flaky scalp symptoms? S9. How would you describe the overall impact of your dandruff or flaky scalp symptoms on you? Base n = 1069
Living with dandruff = currently experiencing symptoms, or experienced in the past 6 months but currently under control

Dandruff affects more than appearance: most Australians say living with symptoms has negatively impacted their overall health.

Perceived impact of dandruff symptoms on overall health:
% who experience

- Very negative impact
- Somewhat negative impact
- Slight negative impact
- No negative impact
- Not sure



76% feel that dandruff negatively impacted their health.

Certain segments feel a stronger negative impact:

Moderate/severe dandruff

85% ↑

Currently managing with products

79% ↑

18-34 age group

81% ↑

Key Pharma Nizoral Research Study 2026 | A3. Thinking about your overall health, which may include physical, mental, emotional, social and spiritual health... Do you feel that your dandruff or flaking symptoms have had an impact on your overall health? Negative impact = top 3 box % (a very negative/somewhat negative/slight negative impact). Base n = 1069, Moderate/severe dandruff n = 767, Currently managing with products n = 804, 18-34 years n = 431
Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower | Moderate/severe vs mild dandruff, currently managing dandruff with products vs not managing with products, 18-34 years vs 35 years and above

Living with dandruff doesn't just undermine social confidence, it takes a heavy emotional toll across several areas of life.

Younger Australians and those managing more severe dandruff feel the emotional burden most acutely.



“

“It's really hard to go out in public and not have to think about scratching your hair every other minute. It's something that makes you very self-conscious.”

- 18-34 years, severe dandruff, currently managing with products

“Can't sleep because it is too hot and itchy, thereby affecting the days and weeks ahead.”

- 35 years or above, moderate dandruff, not managing with products

“The worst part is waking up to white flakes all over the pillow – my kid even jokes it's 'snowing'”.

- 18-34 years, severe dandruff, currently managing with products

”

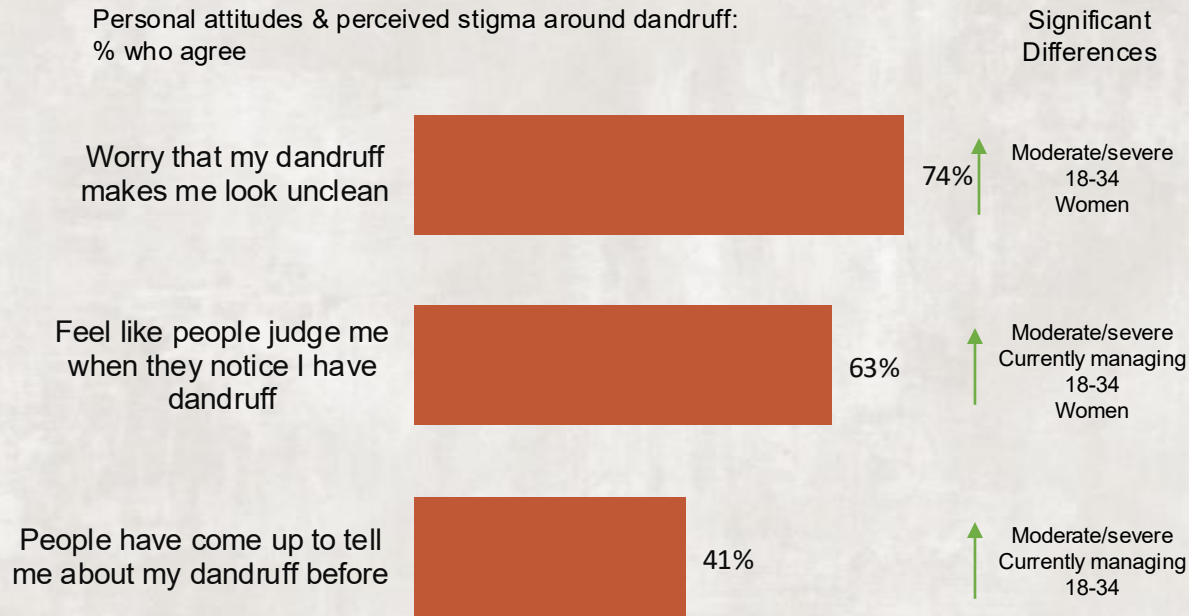
Key Pharma Nizoral Research Study 2026 | A5. To what extent has dandruff or flaking issues had an impact on the following areas of your life? Impact = top 4 box % (significant, noticeable, some, a little negative impact) . A4. In your opinion, what is the most challenging part about having dandruff or dealing with flaky scalp? (open-ended question). Base n = 1069

Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above.

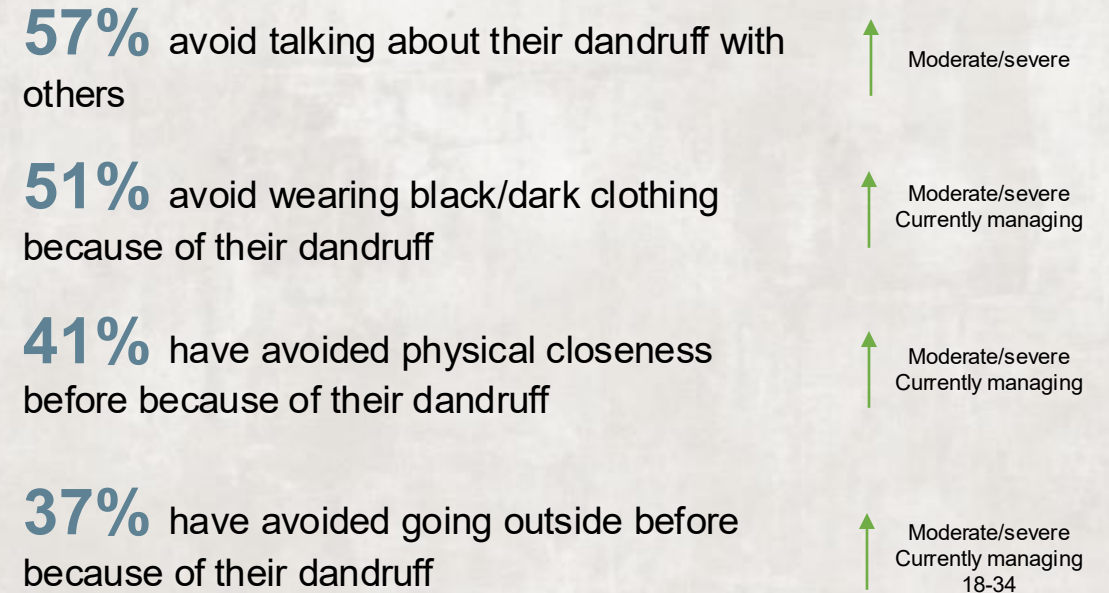
The shame around dandruff shapes how people live, fueling anxiety and avoidance.

With greater severity comes greater silence, self-consciousness and social withdrawal.

Dandruff is commonly associated with poor hygiene and social judgement.



The weight of stigma reshapes daily choices, from how people dress, to how they connect with others.



Key Pharma Nizoral Research Study 2026 | A6. Thinking about your dandruff or flaking issues, how much do you agree or disagree with the following statements? Agree/avoid = top 2 box % (strongly agree and agree). Base n = 1069
Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above, men vs women.

And the more severe the dandruff, the deeper the emotional toll.

Compared to those experiencing mild symptoms,
those with moderate/severe dandruff are...

1.5x more likely

to experience negative mental health impacts from dandruff
(86%, vs 57% for those with mild dandruff)

2x more likely

to avoid wearing black or dark clothes because of their dandruff
(59%, vs 29% for those with mild dandruff)

3x more likely

to avoid physical closeness (e.g. hugs) because of their dandruff
(50%, vs 17% for those with mild dandruff)

“

*Honestly, “dandruff” sounds like something only teenage boys get; I felt silly admitting as a thirty-something (years old) working mum that I **couldn’t keep my own scalp tidy.***

- 18-34 years, severe dandruff, currently managing with products

”

Key Pharma Nizoral Research Study 2026 | A5. To what extent has dandruff or flaking issues had an impact on the following areas of your life? Impact = top 4 box % (significant, noticeable, some, a little negative impact). A6. Thinking about your dandruff or flaking issues, how much do you agree or disagree with the following statements? Agree/avoid = top 2 box % (strongly agree and agree). Base n = 1069, Moderate/severe dandruff n = 767, Mild dandruff n = 302

The Self-Managed, Misunderstood Journey



“

*The most challenging part about dealing with dandruff or a flaky scalp is the **embarrassment** and **constant self-awareness**. I find myself **worrying about visible flakes on dark clothes** or feeling uncomfortable in **social or work settings**, especially under bright lights. It can also be frustrating because even when you wash your hair regularly, the itchiness and flakes can **still come back**.*

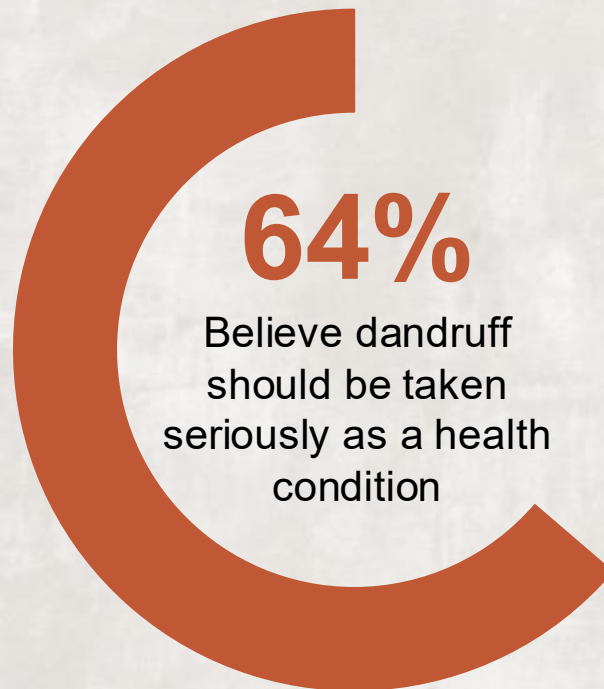
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- 35 years or above, severe dandruff, currently managing with products

Nearly two-thirds of Australians want dandruff to be taken seriously as a health condition.

Many hesitate to speak up, fearing they'll be judged, dismissed or told to manage it on their own.

Personal attitudes & perceived stigma around dandruff:



Stigma and shame: “I’m worried they’d think it was a hygiene problem”

- *“I felt embarrassed to bring it up because I was **worried people would think it’s a hygiene problem** rather than skin condition.”*
- 18-34 years, mild dandruff, currently managing with products
- *“Honestly, I usually hesitate because I feel embarrassed about my flakes and I’m **not sure a doctor or stylist would take it seriously.**”*
- 18-34 years, severe dandruff, currently managing with products
- *“There’s also a bit of embarrassment around talking about scalp problems, especially with a GP or pharmacist, as it **doesn’t feel like a “serious” condition.**”*
- 35 years or above, severe dandruff, currently managing with products

The self-management trap: “It didn’t feel serious enough to bother a health professional”

- *“I felt the issue was not **serious enough for medical attention**, and I was **embarrassed to talk about it.**”*
- 35 years or above, severe dandruff, currently managing with products
- *“Mainly felt it was a **trivial, embarrassing little issue**, not worth **bugging a chemist or mate** about.”*
- 35 years or above, severe dandruff, currently managing with products

Key Pharma Nizoral Research Study 2026 | A6. Thinking about your dandruff or flaking issues, how much do you agree or disagree with the following statements? Agree = top 2 box % (strongly agree and agree). B4. If you’ve ever hesitated to seek help or advice on your dandruff or flaking issues, what were the main reasons for your hesitation? (open-ended question) Base n = 1069

While most Australians recognise their dandruff symptoms early on, management and treatment are largely seen as difficult.

Less than half feel in control of their dandruff symptoms.

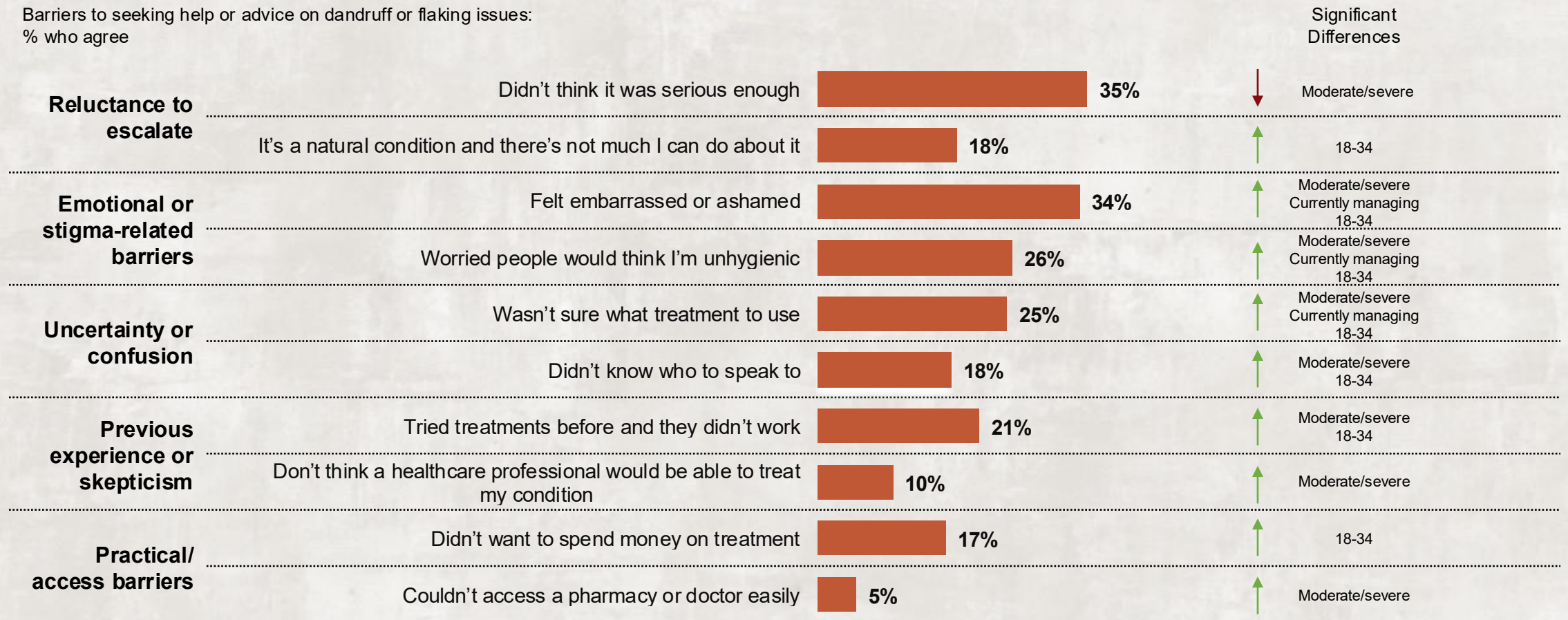
Experiences with managing dandruff or flaking symptoms:
% who agree

		Overall	Moderate/ severe dandruff	Currently managing	18-34 years old
Recognition	I can recognise my symptoms early on	68%	70% ↑	72% ↑	65%
	Manage Symptom/ Search for Effective Treatment				
	Managing my symptoms is frustrating	64%	73% ↑	66% ↑	69% ↑
	It's been hard to find a treatment that works consistently	61%	68% ↑	62%	63%
Control	I feel in control of my symptoms	49%	46% ↓	51% ↑	47%

Key Pharma Nizoral Research Study 2026 | A2. Thinking about your dandruff or flaking symptoms, how much do you agree or disagree with the following statements? Agree = top 2 box % (strongly agree and agree). Base n = 1069, Moderate/severe dandruff n = 767, Currently managing with products n = 804, 18-34 years n = 431. Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above.

Despite the emotional toll, many Australians avoid seeking help, seeing dandruff as too minor, too personal, or unclear to act on.

Barriers to seeking help or advice on dandruff or flaking issues:
% who agree

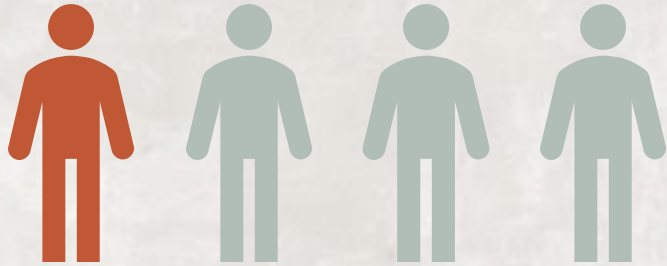


Key Pharma Nizoral Research Study 2026 | B5. Which of the following, if any, have made you less likely to seek help or advice on dandruff or flaking issues? Base n = 1069

Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above.

Only around 1 in 4 Australians primarily use pharmacy brands to manage dandruff.

Many consumers view pharmacy-grade shampoos as costly and unnecessary unless symptoms become severe.



1 in 4

Australians are primarily using **pharmacy brands*** to manage their dandruff symptoms.

“

“I feel that I haven’t needed pharmacy products yet, I usually buy anti-dandruff shampoos from the supermarket.”

- 18-34 years, moderate dandruff, currently managing with products

“Money is tight for me at the moment so buying anti dandruff shampoo is an expense I have to consider.”

- 35 years or above, mild dandruff, not managing with products

“I didn’t want an expensive unnecessary treatment option.”

- 18-34 years, moderate dandruff, currently managing with products

”

Key Pharma Nizoral Research Study 2026 | C2. Which brand do you use most often to help with your dandruff or flaking issues? A4. In your opinion, what is the most challenging part about having dandruff or dealing with flaky scalp? (open-ended question). B8B. You mentioned that you haven’t spoken to a pharmacist about your dandruff or flaking issues before. Could you tell us a bit about why that might be? (open-ended question). Those who have a main brand they currently use to manage dandruff n = 761

*Pharmacy brands list: Nizoral, Selsun, Neutrogena T/Gel, Sebizole

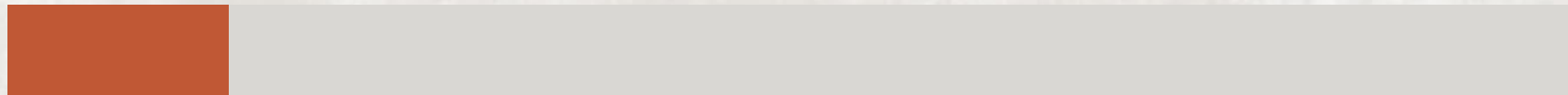
In most cases, Australians only turn to pharmacy brands after other treatments failed.

The majority had been managing symptoms for more than six months before switching.

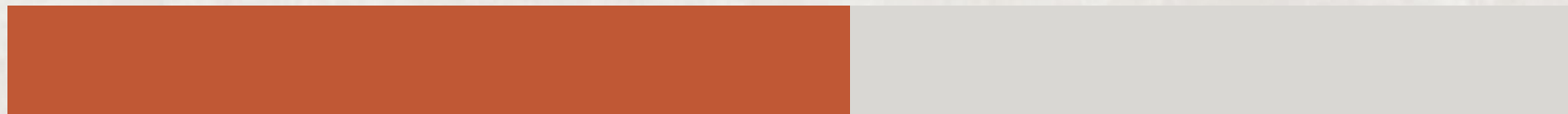
Top: Reasons for choosing pharmacy brands:

Bottom: Timeframe for choosing pharmacy brands:

Over 1 in 10 saw pharmacy brands as the first port-of-call (14%)



More than 1 in 2 had been managing symptoms for more than 6 months prior (53%)



Key Pharma Nizoral Research Study 2026 | C3A. Which of the following best describes when you started using [YOUR MAIN BRAND]? Base n = 267.

C3B. To the best of your knowledge, how long had you been managing your dandruff or flaking issues before you started using [YOUR MAIN BRAND]? Base n = 217

Pharmacists: Trusted but Underutilised



Health professionals such as GPs, dermatologists and pharmacists are top-of-mind for seeking help.

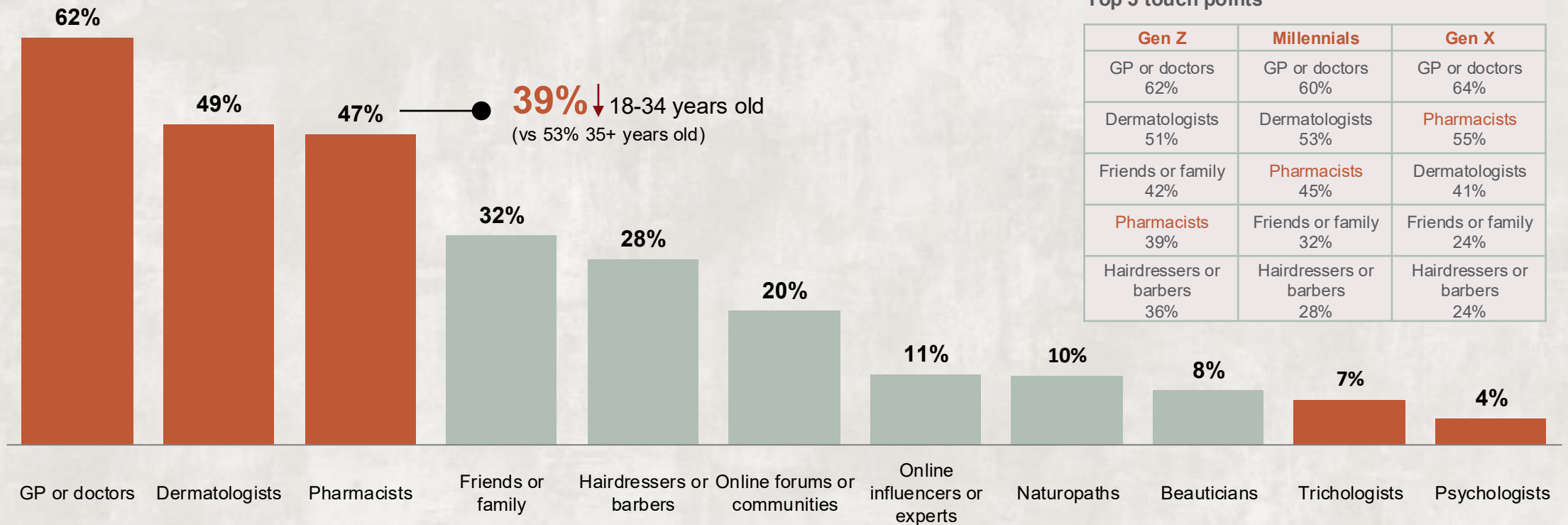
Younger Australians are less likely to consider seeking support from pharmacists.

Touchpoints for seeking help:
& who would consider

Health/allied health professionals Non-health professionals

Top 5 touch points

Gen Z	Millennials	Gen X
GP or doctors 62%	GP or doctors 60%	GP or doctors 64%
Dermatologists 51%	Dermatologists 53%	Pharmacists 55%
Friends or family 42%	Pharmacists 45%	Dermatologists 41%
Pharmacists 39%	Friends or family 32%	Friends or family 24%
Hairdressers or barbers 36%	Hairdressers or barbers 28%	Hairdressers or barbers 24%



Key Pharma Nizoral Research Study 2026 | B1. Where would you consider going if you wanted help or advice on dandruff or flaking issues? Base n = 1069, 18-34 years n = 431, Gen Z n = 254, Millennials n = 454, Gen X n = 361
Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: 18-34 years old vs 35 years old and above

For younger Australians, pharmacists aren't top of mind for dandruff, not because of distrust, but uncertainty.

Pharmacists aren't top-of-mind because their role in scalp health isn't well understood by younger Australians.

“

“I didn't know pharmacists could help with scalp issues.”

- 18-34 years, moderate dandruff, currently managing with products

“I haven't really thought [that a] pharmacist would have any special advice on the matter.”

- 18-34 years, mild dandruff, currently managing with products

“I didn't think that was an option and am worried they won't give the right advice.”

- 18-34 years, severe dandruff, currently managing with products

“I didn't think it was necessary because I had received information from other sources.”

- 18-34 years, moderate dandruff, currently managing with products

”

Whereas doctor's appointments instill a sense of privacy and non-judgement, pharmacies are perceived as less welcoming environments.

“

“I didn't want them and everyone else in store to see or think I'm unhygienic.”

- 18-34 years, moderate dandruff, currently managing with products

“I am scared of judgement, I don't want this issue known at my local chemist.”

- 18-34 years, moderate dandruff, currently managing with products

“I just don't regularly go to a pharmacist and I've never felt comfortable talking to someone about it in a public setting.”

- 18-34 years, moderate dandruff, not managing with products

“The chemist queue's always full of blokes – letting my hair down feels like I'm blocking the aisle.”

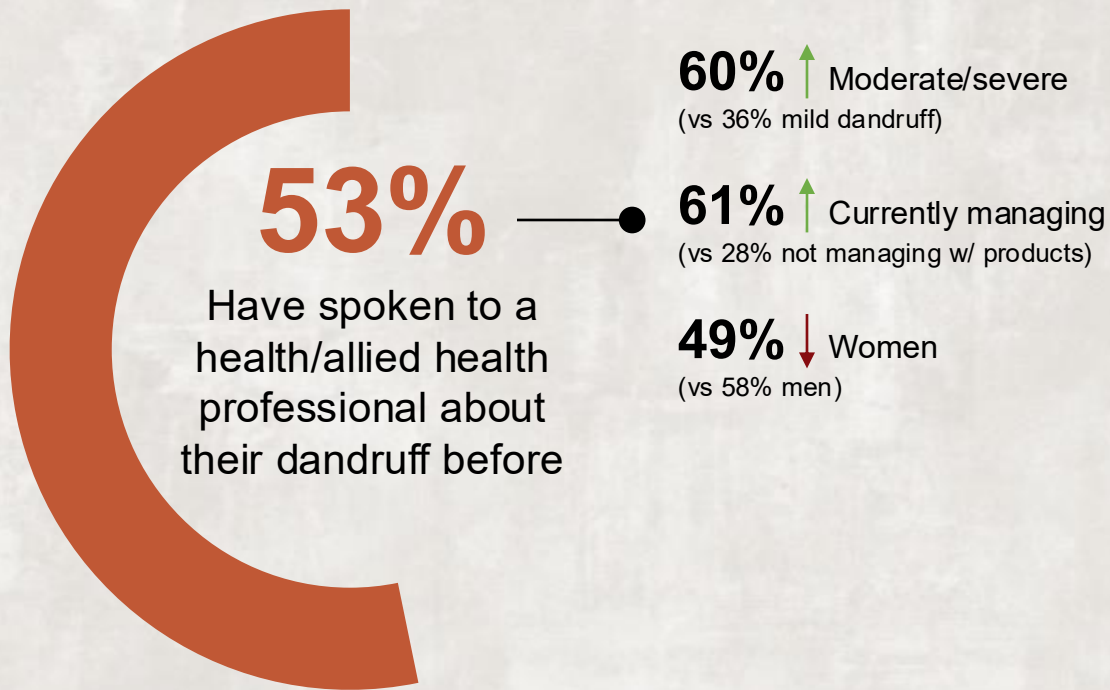
- 18-34 years, severe dandruff, currently managing with products

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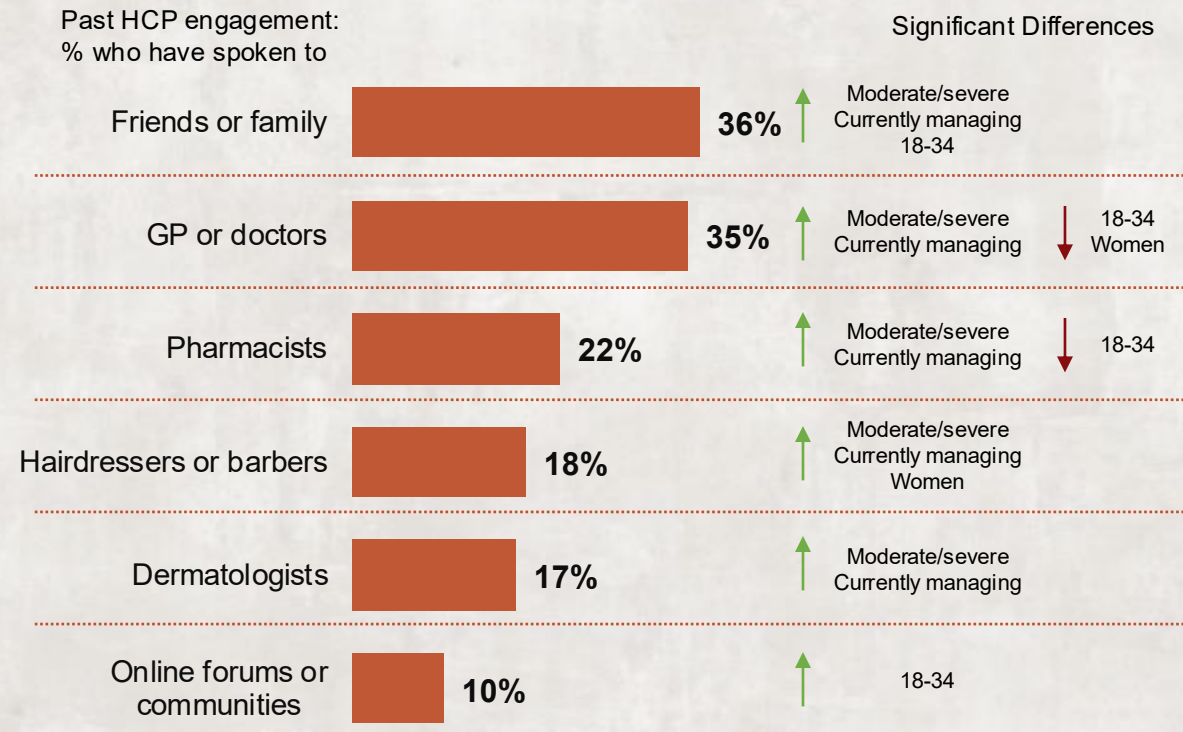
Key Pharma Nizoral Research Study 2026 | B8B. You mentioned that you haven't spoken to a pharmacist about your dandruff or flaking issues before. Could you tell us a bit about why that might be? (open-ended question).
18-34 year olds who haven't spoken to a pharmacist before n = 311

Despite the everyday impact of dandruff, many Australians don't seek professional support.

Past HCP engagement:



Family, friends and doctors are the most utilised touchpoints for seeking dandruff support.



Key Pharma Nizoral Research Study 2026 | B3. And who have you already spoken to about your dandruff or flaking issues? Base n = 1069, Moderate/severe dandruff n = 767, Mild dandruff n = 302, Currently managing with products n = 804, Not currently managing n = 265, Women n = 556, Men = 513
 Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above, men vs women.

“

*I usually only go to a pharmacy **after a doctor's appointment** and didn't want to **explain all over again**. It's **mentally challenging enough** speaking about it once in depth...*

”

- 35 or above, mild dandruff, not managing with products

Few Australians speak to pharmacists about dandruff, but those who do find it highly helpful.

Past HCP engagement:



23% ↑ Moderate/severe
(vs 17% mild dandruff)

25% ↑ Currently managing
(vs 12% not managing w/ products)

16% ↓ 18-34
(vs 25% 35 years old and above)

Helpfulness of previous pharmacist engagements:



Key Pharma Nizoral Research Study 2026 | B3. And who have you already spoken to about your dandruff or flaking issues? B8. Thinking back to your most recent experience of speaking to each of the following about your dandruff or flaking issues, which of the below best describes that experience? Helpful = top 2 box % (Very and somewhat helpful). Base n = 1069, Moderate/severe dandruff n = 767, Mild dandruff n = 302, Currently managing with products n = 804, Not currently managing n = 265, 18-34 years n = 431, 35 years and above n = 638. Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above.

Those who have spoken with pharmacists perceive them as empathetic, professional and easy to talk to.

There is an additional opportunity to bolster their perceived understanding of scalp health issues.

Pharmacist experience:
% who agree



“

*“The pharmacist **patiently listened, explained treatment options clearly, and made me feel genuinely cared for.**”*

- 18-34, moderate dandruff, currently managing with products

*“They made me feel **comfortable and un-ashamed about it. They helped me find good products to help with my dandruff.**”*

- 18-34, mild dandruff, currently managing with products

*“My pharmacist was instrumental in helping me **figure out the best way to tackle my dandruff issues. They gave me a target, and a plan to use various treatments...**”*

- 18-34, severe dandruff, currently managing with products

”

Key Pharma Nizoral Research Study 2026 | B6A. Thinking about that same experience of speaking to a pharmacist, how much do you agree or disagree with the following statements? Agree= Top 2 box % (strongly and somewhat agree). B8A. You said that your most recent experience of speaking to a pharmacist was helpful/unhelpful. Could you tell us a bit more about why you gave that rating? (open-ended question). Those who spoke to a pharmacist n = 230

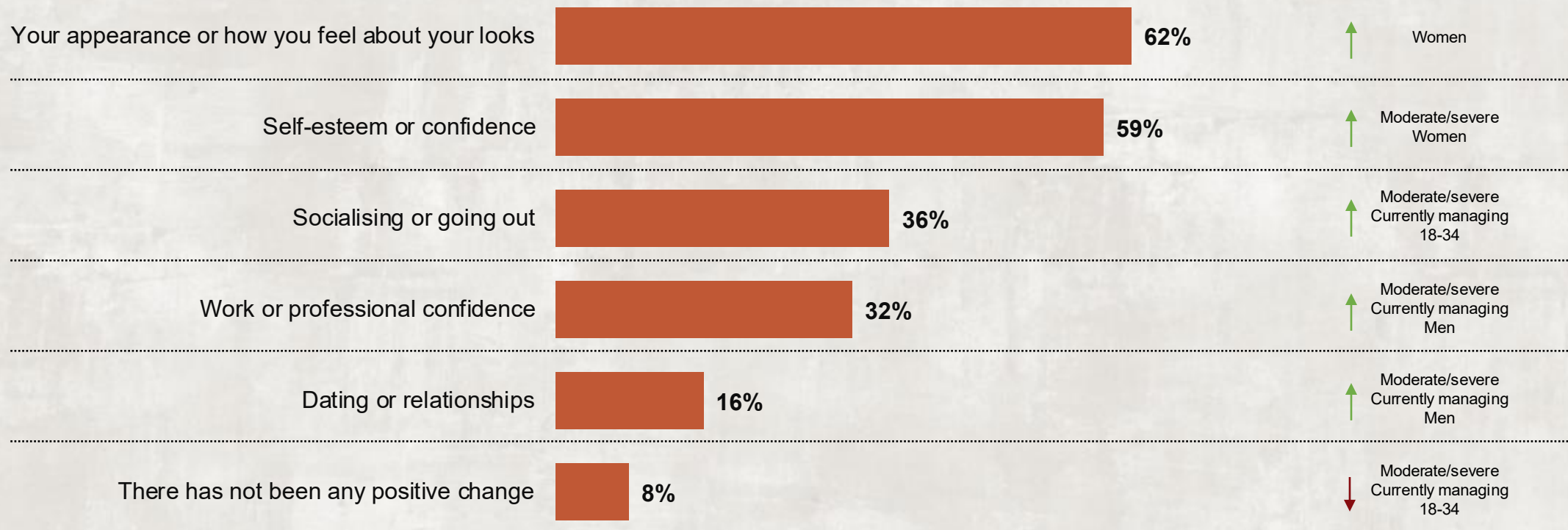
Confidence Starts at the Scalp

Improving dandruff symptoms delivers benefits across multiple areas of Australians' lives.

The impact goes beyond appearance, with improvements felt across emotional wellbeing, confidence and everyday life.

Areas of life that experienced positive changes with dandruff improvement:
% who agree

Significant Differences

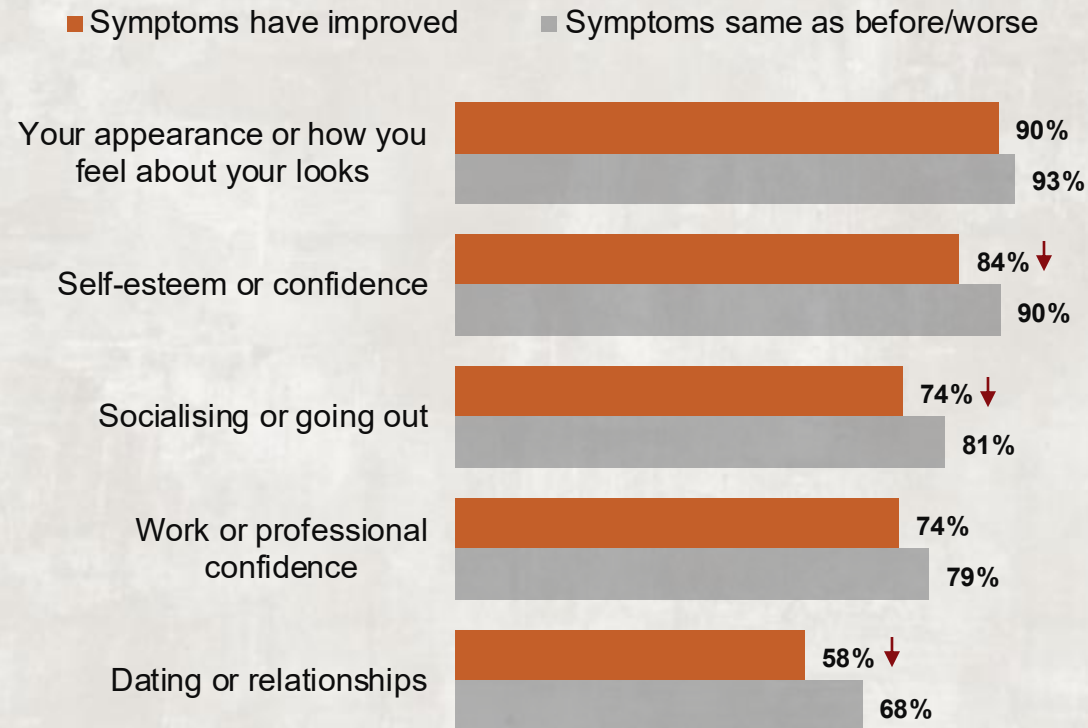


Key Pharma Nizoral Research Study 2026 | A7. Which areas of your life saw positive change since your dandruff or flaking issues improved? Symptoms improved n = 479
Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, Currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above, men vs women.

When dandruff improves, the socioemotional burden significantly reduces.

There is a significantly greater sense of control and confidence over their dandruff symptoms..

Perceived emotional & self-esteem impact:
% who experience



Among those who have experienced improvement to their dandruff symptoms:

70% ↑ feel in control of their symptoms
(vs 33% same/worse than before)

68% ↑ feel they can confidently treat/manage flare ups
(vs 41% same/worse than before)

Key Pharma Nizoral Research Study 2026 | A5. To what extent has dandruff or flaking issues had an impact on the following areas of your life? Impact = top 4 box % (significant, noticeable, some, a little negative impact). A2. Thinking about your dandruff or flaking symptoms, how much do you agree or disagree with the following statements? Symptoms improved n = 479, symptoms same/worse n = 577.

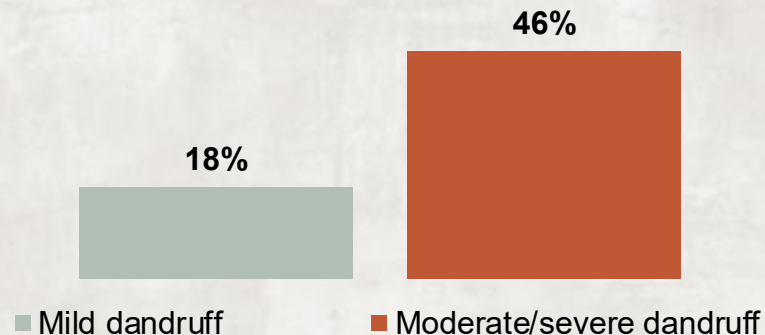
Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Symptoms improved since first becoming aware of dandruff vs symptoms same as before/worse

And those with moderate or severe dandruff feel the biggest relief, emotionally and socially.

Compared to those with mild symptoms, when Australians living with moderate to severe dandruff experience improvements to their condition, they are...

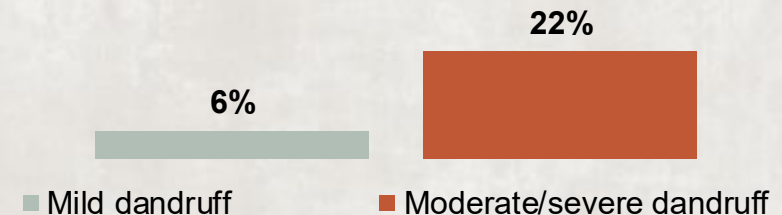
**2.5x
more likely**

to experience positive changes
to their social life



**3.6x
more likely**

to experience positive changes to their
dating life and relationships

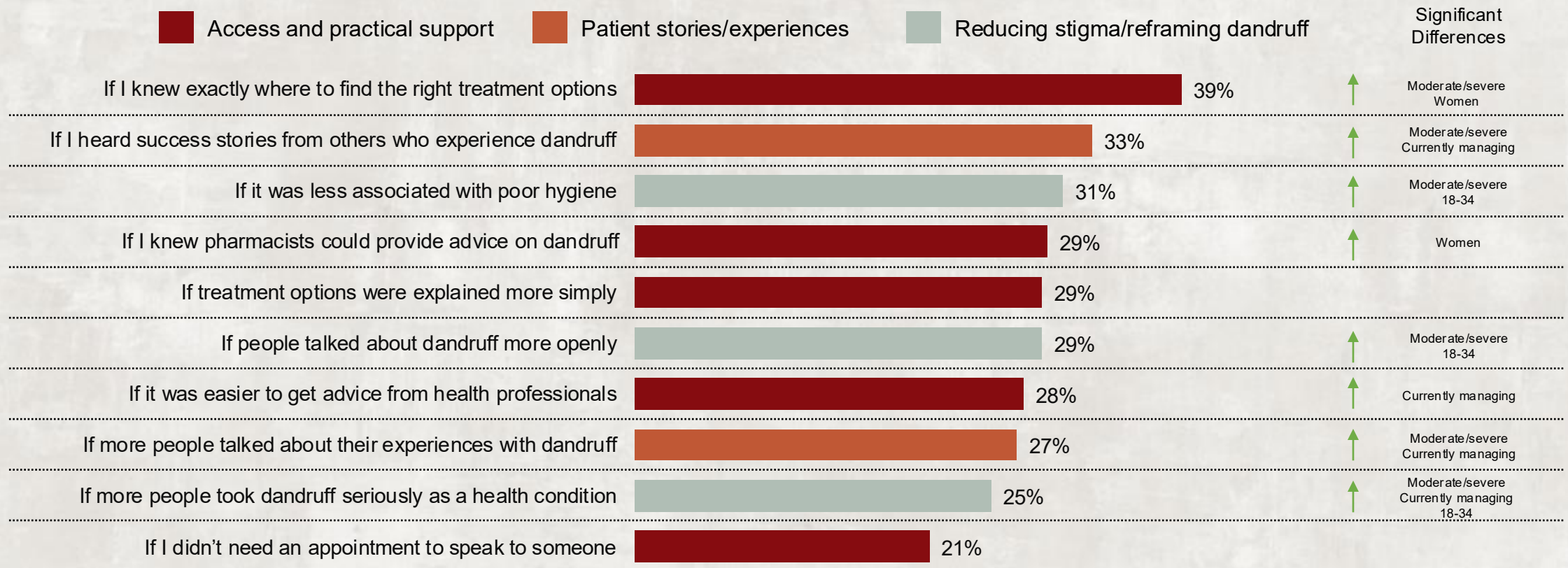


Key Pharma Nizoral Research Study 2026 | A7. Which areas of your life saw positive change since your dandruff or flaking issues improved? Agree/avoid = top 2 box % (strongly agree and agree). Those who experienced improvements to their dandruff since first becoming aware of it: Moderate/severe dandruff n = 305, Mild dandruff n = 174

Reducing barriers to seeking help begins with awareness, access and advocacy.

There is an opportunity for pharmacists to make it easier for people to seek help for dandruff.

Drivers to seeking help for dandruff:
% who agree



Key Pharma Nizoral Research Study 2026 | B7. Which of the following might encourage you to seek help or advice for dandruff or flaking issues? Base n = 1069. Comparing significance at 95% CI | ↑ / ↓ Significantly higher / lower between the following segments: Moderate/severe vs mild dandruff, Currently managing dandruff with products vs not managing with products, 18-34 years old vs 35 years old and above, men vs women. \

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