

Women's Haircare - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The women’s haircare category has struggled to grow in value in recent years, as savvy shopping behaviours see women buying branded products at discount retailers. In addition, women are washing and styling their hair less frequently, which may be driven by concern over damage.”
– Roshida Khanom, Senior Personal Care Analyst

This report looks at the following areas:

- Targeting older women can grow the market
- Shampoo sector presents opportunities
- Women show interest in scalp protection benefits

The women's haircare category has shown a decline in value in recent years, driven down by the mass-market sector where savvy shopping behaviours are encouraging women to shop for branded products at lower prices.

Although new products such as co-washes show low usage, opportunities for growth in the category exist in new launches; women show high interest in shampoo innovations and scalp treatments in particular.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Women's Haircare - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Products covered in this report

Executive Summary

- Market value struggles to keep afloat
 - Figure 1: UK retail value sales of the women's haircare market, 2010-20
- Category growth could come from older women
- New products grow in focus
 - Figure 2: New product development in the women's haircare category, by launch type, January 2013-February 2016
- Shampoo usage is rising
 - Figure 3: Usage of haircare products, January 2016
- Women show interest in more natural solutions
 - Figure 4: Changes in haircare habits in the past 12 months, January 2016
- Opportunities for scalp care
 - Figure 5: Interest in haircare innovations, January 2016

What we think

Issues and Insights

- Targeting older women can grow the market
 - The facts
 - The implications
- Shampoo sector presents opportunities
 - The facts
 - The implications
- Women show interest in scalp protection benefits
 - The facts
 - The implications

The Market – What You Need to Know

- Prestige keeps category afloat
- Discount retailers are impacting the mass market
- Improving financial situations could boost the category
- Encouraging purchase in older women
- Growth of beauty supplements
- Using social media

Market Size and Forecast

- A market struggling to show growth
 - Figure 6: UK retail value sales of the women's haircare market, 2010-20

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Women's Haircare - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Opportunities for the future

Figure 7: UK retail value sales of the women's haircare market, 2010-20

Segment Performance

Prestige haircare sales out-perform mass-market

Figure 8: UK retail value sales of the women's haircare market, prestige vs mass, 2014-15

Styling keeps mass-market sales afloat

Figure 9: UK retail value sales of the women's mass-market haircare market, by product type, 2014-15

Channels to Market

Grocery multiples and Boots maintain market share

Figure 10: UK retail value sales of women's haircare products, by retail channel, 2014-15

Market Drivers

Improving financial situations

Figure 11: Trends in current financial situation compared with a year ago, February 2012 and February 2016

Trading up to grow the market

Figure 12: Trends in the age structure of the UK female population, 2010-20

Embracing age

Figure 13: Attitudes related to looking for beauty products, 16-24s vs over 65s, September 2015

Treating hair from the inside

Online styling tutorials

Figure 14: Types of information wanted from BPC social media sites, by topic, April 2015

Key Players – What You Need to Know

Usage drives trust and differentiation ratings

Rise in advertising spend

Overall innovation is down, but new products are up

Seasonal and mass-market 'premium' launches

Free-from continues to be a focus area

Brands with specific solutions fare well

New launches boost styling sales

Brand Research

Brand map

Figure 15: Attitudes towards and usage of selected brands, March 2016

Key brand metrics

Figure 16: Key metrics for selected women's haircare brands, March 2016

Brand attitudes: Value ratings are low across brands

Figure 17: Attitudes, by women's haircare brand, March 2016

Brand personality: Batiste, Aussie and Dove have fun personalities

Figure 18: Brand personality – Macro image, March 2016

Dove performs well for being expert

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Women's Haircare - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 19: Brand personality – Micro image, March 2016

Brand analysis

Dove has universal appeal

Figure 20: User profile of Dove, March 2016

Batiste is a fun brand

Figure 21: User profile of Batiste, March 2016

Aussie performs well with young women

Figure 22: User profile of Aussie, March 2016

Head & Shoulders is tired

Figure 23: User profile of Head & Shoulders, March 2016

Pantene performs low for differentiation but high for trust

Figure 24: User profile of Pantene, March 2016

Charles Worthington is considered exclusive

Figure 25: User profile of Charles Worthington, March 2016

Brand Communication and Promotion

TV advertising becomes a bigger focus

Figure 26: Recorded above-the-line, online display and direct mail total advertising expenditure on women's haircare, by media type, January 2013-February 2016

P&G leads advertising spend

Figure 27: Recorded above-the-line, online display and direct mail total advertising expenditure on women's haircare, by top ten advertisers for 2015, January 2014-February 2016

Coverage/methodology clarification

Launch Activity and Innovation

New products are growing in focus

Figure 28: New product development in the women's haircare category, by launch type, January 2013-February 2016

Figure 29: New product launches with volumising claims, 2015

Rise in conditioner launches

Figure 30: New product development in the women's haircare category, by sub-category, January 2013-February 2016

Figure 31: Cleansing conditioners launched in 2015

Seasonal launches for P&G and L'Oréal

Figure 32: New product development in the women's haircare category, by top four ultimate companies and other, 2015

Figure 33: Seasonal launches from P&G and L'Oréal, 2015

Mass-market 'premium' launches

Products for coloured hair

Figure 34: Haircare launches for coloured hair, 2015

Free-from continues as a focus

Figure 35: New product development in the women's haircare category, by top ten claims for 2015, January 2013-February 2016

Figure 36: Color Wow hair supplements, March 2016

Market Share

Specific solutions may be driving shampoo sales

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Women's Haircare - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 37: UK retail value sales of women's mass-market shampoo, by brand, years ending November, 2014 and 2015

Conditioner sales reflect shampoo sales

Figure 38: UK retail value sales of women's mass-market conditioner, by brand, years ending November, 2014 and 2015

New launches boost styling sales

Figure 39: UK retail value sales of women's mass-market styling products, by brand, years ending November 2014 and 2015

The Consumer – What You Need to Know

Wet shampoo usage is on the rise

Women are seeking natural solutions

Hairstyles should be low maintenance

Brand name is a key influencer

Night-time treatments and scalp protection offer opportunities

Usage Trends in Women's Haircare

Shampoo usage is on the rise

Figure 40: Usage of haircare products, January 2016

Styling products are less favoured

Scalp protecting products have opportunities

Newer products have lower usage

Figure 41: Usage of co-wash, January 2016

Older women show interest in co-wash

Figure 42: Never used co-wash but interested in doing so in the future by age, January 2016

Changes in Haircare Habits

Damage concern might be driving habit changes

Figure 43: Changes in haircare habits in the past 12 months, January 2016

The natural route

Younger women look for quick fixes

Figure 44: Selected changes in haircare habits in the past 12 months, by youngest and oldest demographics, January 2016

Older women seek professional help

Figure 45: Selected changes in haircare habits in the past 12 months, by youngest and oldest demographics, January 2016

Older women are changing their haircare habits

Figure 46: Repertoire of habits changed in the past 12 months, by age, January 2016

Styling Habits

Low maintenance is key

Figure 47: Daytime styling habits, January 2016

Young women are willing to take their time

Evenings are about giving hair a break

Figure 48: Evening styling habits (when at home), January 2015

Older women invest time in their hair

Figure 49: Preference to wash/prepare hair for desired style, by age, January 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Women's Haircare - UK - April 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Hair should be effortless, even for special occasions

Figure 50: Special occasion styling habits, January 2016

Mums want to make an effort

Figure 51: Styling habits of mums (of under-16s), January 2015

Purchase of Haircare Products

Brand name is important

Figure 52: Haircare purchase habits in the past 12 months, January 2016

Younger women are increasing their spend

Interest in Haircare Innovations

Interest in shampoo innovations is high

Figure 53: Interest in haircare innovations, January 2016

Night-time treatments

Positioning scalp protection in the professional sector

Older women show interest in CC balms/creams

72hr claims are appealing

Figure 54: Interest in haircare claims, January 2016

Scalp products are of interest

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Abbreviations

Fan chart forecast

Brand research

Brand map

Correspondence analysis

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com