

Men's Haircare - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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



“An already growing interest in appearance from young men is key to growing the category further. This cohort is more engaged with the beauty sector than ever before, and appreciates that dedicated products are more likely to address their wants and needs.”

– **Lucy Cornford, Category Director – Beauty & Personal Care**

This report looks at the following areas:

- Encouraging prevention over cure
- NPD can drive further engagement

The value of the men's mass-market haircare category has continued its upwards trajectory, but with renewed vigour. But rather than more products being used overall, this performance is the result of a growing recognition among men that dedicated men's products are more suited to meet their needs, tempting them away from using or buying unisex- and female-positioned varieties.

Building on this appreciation is therefore key to boosting the market further. With young men the most engaged with the category, it is important to help them develop healthy hair habits and encourage them to maintain these in order to help prevent or limit hair issues later in life.

**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

Men's Haircare - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

The market
Market value buoyed by increased engagement from young men
Figure 1: Best- and worst-case forecast for UK value sales of men's haircare*, 2011-21

A focus on male concerns boosts value sales
Figure 2: Share of UK retail value sales for men's haircare*, by segment, 2015-16 (est)

Companies and brands
NPD elevated by styling products
Figure 3: New product development in the men's haircare category, by product type, 2013-16

The consumer
A functional category
Figure 4: Usage of haircare products, November 2016

Young men could benefit from more guidance
Figure 5: Statements around washing and styling hair, November 2016

Men want choice, but not too much
Figure 6: Attitudes towards haircare, November 2016

Anti-dandruff shampoo has the most positive associations
Figure 7: Perceptions of shampoo types, November 2016

Style can be a bigger hurdle than cut or length
Figure 8: Desired and current hairstyle, November 2016

What we think

Issues and Insights

Encouraging prevention over cure
The facts
The implications
NPD can drive further engagement
The facts
The implications

The Market – What You Need to Know

A market in growth
'Caring' over 'styling'
Online boosts 'other' retail channels
Population growth of young adults slows

**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

Men's Haircare - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

Grooming routines are fast filling up

Young men respond to online initiatives

Market Size and Forecast

Increasing engagement from men buoys market value

Figure 9: UK retail value sales of men's haircare*, at current and constant prices, 2011-21

Slow and steady growth predicted

Figure 10: Best- and worst-case forecast for UK value sales of men's haircare*, 2011-21

Forecast methodology

Market Segmentation

A focus on male concerns boosts value sales

Figure 11: UK retail value sales for men's haircare*, by segment, 2015-16 (est)

Treatments and conditioners encourage male investment

Channels to Market

Supermarkets may be stifling growth

Figure 12: UK retail value sales for men's haircare*, by segment, 2015-16 (est)

'Other' channels benefit from rise of online

Market Drivers

Population growth of younger men slows...

Figure 13: Trends in the age structure of the UK male population, by gender, 2011-21

...though more teens and tweens offers potential

Figure 14: Factors which influence boys when choosing BPC products, August 2016

Young men most concerned about appearance...

Figure 15: Attitudes towards appearance amongst men, December 2016

...and spend most time on hair

Figure 16: Time spent on maintaining/enhancing hair, by gender and age, December 2016

Using online platforms

Harnessing the power of social media fitness stars

Figure 17: Deliciously Ella and Neal's Yard skincare line, December 2016

Gifting as an open goal

Figure 18: Proportion of men who have received haircare gift sets as a gift in the past 12 months, by age, June 2016

Companies and Brands – What You Need to Know

NPD elevated by styling products

True innovation remains high

Recorded advertising spend falls

Lynx benefits from its vibrant image

Head & Shoulders has functional appeal

Launch Activity and Innovation

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

Men's Haircare - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

Hair styling NPD boosts overall launch activity

Figure 19: New product development in the men's haircare category, by product type, 2013-16

Figure 20: Examples of new hair styling launches with conditioning properties positioned for men, 2016

True innovation remains high

Figure 21: New product development in the men's haircare category, by launch type, 2013-16

Figure 22: Examples of 'new product' launches positioned for men to add density/thickness, 2016

Figure 23: Examples of 'new product' launches positioned for men, 2016

Shampoo as an alternative to colourant

Figure 24: Just for Men Control GX Grey Reducing Shampoo, February 2017

Obviously beneficial claims grow

Figure 25: Top five and bottom five positioning claims by percentage point change in the men's haircare market, 2015-16

Botanical and ethical formulations fall from favour

Unilever dominates product development

Figure 26: New product development in the men's haircare category, by top six ultimate companies and other, 2016

Figure 27: Lynx Find Your Magic style guide, February 2017

Advertising and Marketing Activity

Advertising spend falls

Figure 28: Total above-the line, online display and direct mail advertising expenditure on men's haircare products, 2014-16

Alpecin drives advertising spend

Figure 29: Recorded above-the line, online display and direct mail advertising expenditure on men's haircare products, by media type, 2014-16

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 30: Attitudes towards and usage of selected brands, January 2017

Key brand metrics

Figure 31: Key metrics for selected brands, January 2017

Brand attitudes: Lynx appeals on an emotional level

Figure 32: Attitudes, by brand, January 2017

Brand personality: Brylcreem struggles with negative brand image

Figure 33: Brand personality – Macro image, January 2017

Head & Shoulders appeals for basic functionality

Figure 34: Brand personality – Micro image, January 2017

Brand analysis

Lynx benefits from strong link with male grooming

Figure 35: User profile of Lynx, January 2017

Head & Shoulders has functional appeal

Figure 36: User profile of Head & Shoulders, January 2017

L'Oréal Elvive for Men battles with low usage

Figure 37: User profile of L'Oréal Elvive for Men, January 2017

**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

Men's Haircare - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

Strong links with styling limits appeal of VO5

Figure 38: User profile of VO5, January 2017

Brylcreem hampered by 'old-fashioned' image

Figure 39: User profile of Brylcreem, January 2017

The Consumer – What You Need to Know

A functional category

Young men could benefit from more guidance

Men want choice, but not too much

Anti-dandruff has most positive associations...

...but anti-hair loss and volumising viewed negatively

Style a bigger hurdle than cut or length

Usage of Haircare Products

A functional category

Figure 40: Usage of haircare products, November 2016

Consistent usage not necessarily a negative

Figure 41: Any usage of haircare products, January 2016 and November 2016

Younger men broaden interest in haircare

Figure 42: Any usage of haircare products, by age, November 2016

Product repertoire is broadest amongst younger males

Figure 43: Repertoire of haircare products used, by age, November 2016

Washing and Styling Hair

Older men are content with their routines

Figure 44: Statements around washing and styling hair, November 2016

Shampoo as a 'treatment'

Men rely on more sensory cues when washing

Seeing a snapshot of the future could change current habits

Attitudes towards Haircare

Men want the choice, without too much to choose from

Figure 45: Attitudes towards haircare, November 2016

NPD could engage older users...

...alongside targeted information

An autonomous decision

Male-specific products preferred by younger men

Shampoo Associations

Anti-dandruff has most positive associations

Figure 46: Perceptions of shampoo types, November 2016

Figure 47: Attitudes towards shampoo types, November 2016

Organic has opportunities with sensitivity

**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

Men's Haircare - UK - March 2017

Report Price: £1995.00 | \$2478.79 | €2334.35

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

Increasing anti-hair loss in mass market can improve perception

Desired and Current Hairstyle

Style can be a bigger hurdle than cut or length

Figure 48: Desired and current hairstyle, November 2016

Figure 49: Desired and current hairstyle amongst 16-34s, November 2016

Inspiration needs to be effortless

Figure 50: Brylcreem positioning in the US, 2016

Target Groups

Figure 51: Men's haircare target groups, November 2016

The Engaged

The Confused

The Unengaged

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Correspondence analysis

Forecast methodology

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