

Women's Haircare - UK - April 2021

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- Impact of COVID-19 on women's haircare routines.
- Usage frequency of women's haircare and styling products in the last 12 months.
- Interest in types of personalisation when it comes to haircare/styling products.
- Interest in innovation areas when it comes to haircare/styling products.
- Purchase behaviours of haircare/styling products in the last 12 months.

The women's haircare category has maintained its market size in recent years, however, 2020 significantly impacted usage behaviours resulting in an 8% decline in value, reaching £1.26 billion.

COVID-19 has disrupted haircare and styling routines; 30% of female shampoo users have shampooed their hair less frequently since the start of the pandemic and the usage of styling products has reduced as prolonged periods at home have reduced the need to keep up appearances.

The shift in usage behaviours is the biggest threat in the category, as working from home is set to become a feature of the next normal. Haircare and styling routines were relaxing even before the pandemic, with the trend being exacerbated by COVID-19. As women continue to spend more time at home in the medium and longer term, brands will need to offer more than just appearance benefits to drive usage.

There are opportunities in more meaningful personalisation; products based on hair density is a top five interest area for 47% of female haircare and styling users when it comes to personalised haircare/styling. There is also high interest in more sustainable options, with 52% of female haircare users showing interest in using haircare/styling products made using sustainably sourced ingredients.



"Women's haircare/styling routines were relaxing even before the pandemic, however, stay-at-home measures have significantly impacted usage behaviours, with a shift in routines set to remain. Styling has seen the greatest setback, however, across all segments brands that have maintained marketing activity and innovated in areas of interest to the consumer have fared well."

Roshida Khanom, Category Director BPC
Buy this report now

Visit store.mintel.com

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

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

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **COVID-19: market context**
- **Economic and other assumptions**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **Impact of COVID-19 on women's haircare**
Figure 1: Short, medium and long-term impact of COVID-19 on women's haircare, 8 April 2021
- **The market**
- **Haircare sees significant impact in 2020**
Figure 2: UK retail value sales forecast of women's haircare, 2015-25 (prepared on 8 April 2021)
- **Online buying sees significant boost**
- **Companies and brands**
- **Shampoo brands innovate to remain relevant**
Figure 3: UK retail value sales of women's mass-market shampoo, by brand, 2020
- **Communication benefits P&G conditioners**
Figure 4: UK retail value sales of women's mass-market conditioner, by brand, 2020
- **Styling brands suffer value loss**
Figure 5: UK retail value sales of women's mass-market styling products, by brand, 2020
- **The consumer**
- **Promote haircare for relaxation to drive engagement**
Figure 6: Changes in women's haircare routines, December 2020
- **Make solid shampoo/conditioner more widely available**
Figure 7: Usage frequency of haircare products compared with a year ago, December 2020
- **Give consumers style with care**
Figure 8: Usage frequency of hairstyling products compared with a year ago, December 2020
- **Make personalisation meaningful**
Figure 9: Interest in personalisation in haircare, December 2020
- **Look to protective claims in care and styling**
Figure 10: Interest in haircare innovation, December 2020
- **Elevate the online experience for new shoppers**
Figure 11: Purchase of haircare products, December 2020

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

- **Savvy shopping has been strengthened**
Figure 12: Changes in haircare/styling product buying behaviours in the last 12 months, December 2020

ISSUES AND INSIGHTS

- **COVID-19 questions the need for styling**
- **Brand communication is essential for engagement**
- **Offer variety in more sustainable options**

THE MARKET – KEY TAKEAWAYS

- **COVID-19 significantly impacts styling segment**
- **Buying behaviours have shifted**
- **Savvy shopping behaviours will resume**

MARKET SIZE AND FORECAST

- **COVID-19 shifts haircare habits**
Figure 13: Short, medium and long-term impact of COVID-19 on women's haircare, 8 April 2021
- **Haircare sees significant decline in 2020**
Figure 14: UK retail sales of women's haircare, 2015-25 (prepared on 8 April 2021)
- **Some recovery expected in 2021**
Figure 15: UK retail value sales forecast of women's haircare, 2015-25 (prepared on 8 April 2021)
- **Market drivers and assumptions**
Figure 16: Key drivers affecting Mintel's women's haircare market forecast, 2016-25 (prepared on 9 April 2021)
- **Women's haircare surged in value during the last recession**
Figure 17: Retail value sales of women's haircare, 2010-20
- **Forecast methodology**

MARKET SEGMENTATION

- **Mass and prestige both decline in 2020**
Figure 18: UK retail value sales of the women's haircare category, prestige vs mass, 2019 and 2020
- **Styling suffers significant losses**
Figure 19: UK retail value sales of the women's mass-market haircare category, by product type, 2019 and 2020
- **Care over appearance**

CHANNELS TO MARKET

- **Grocery multiples benefit from lockdowns**
Figure 20: UK retail value sales of women's haircare products, by retail channel, 2019 and 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



Report Price: £2195 | \$2995 | €2600

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

- **Online shopping boosts online pureplayers**

MARKET DRIVERS

- **Brexit poses administrative issues for brands**
- **Consumer confidence is returning**
Figure 21: Trends in consumer sentiment for the coming year, January 2020-February 2021
- **Population of teens set to rise**
Figure 22: Trends in the female age structure of the UK population, 2015-25
- **Washing opportunities drive the need for wellbeing**
- **Damage concern is high**

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Haircare borrows from skincare in 2020**
- **Connecting with consumers has helped brands stay afloat**
- **Brands recognise the natural hair community**
- **Sustainability continues to be important**

MARKET SHARE

- **NPD helps shampoo brands in 2020**
Figure 23: UK retail value sales of women’s mass-market shampoo, by brand, 2019 and 2020
- **P&G brands fare well in the conditioner segment**
Figure 24: UK retail value sales of women’s mass-market conditioner, by brand, 2019 and 2020
- **Cantu is the only brand to see gains in styling**
Figure 25: UK retail value sales of women’s mass-market styling products, by brand, 2019 and 2020

LAUNCH ACTIVITY AND INNOVATION

- **Hair and scalp serums borrow from skincare**
Figure 26: New product development in the women’s haircare category, by sub-category, January 2017-February 2021
Figure 27: Examples of hair treatments, 2020-21
- **2020: the year of affordable haircare**
Figure 28: Examples of new haircare brands, 2020-21
- **New brands focus on specific consumer groups**
Figure 29: New product development in the women’s haircare category, by launch type, January 2017-February 2021
Figure 30: Examples of new haircare brands targeting specific consumer groups, 2020
- **Sustainability takes centre stage in 2020**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £2195 | \$2995 | €2600

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

Figure 31: New product development in the women’s haircare category, by ultimate companies and others, 2020

Figure 32: Examples of NPD by L’Oréal in women’s haircare focusing on sustainability, 2020

Figure 33: Examples of NPD by Procter & Gamble in women’s haircare focusing on sustainability, 2020

• **Environmentally friendly claims see a rise**

Figure 34: Wild Science Lab, 2020

Figure 35: Fastest-growing claims in the women’s haircare category, 2019-20

• **Solid shampoo trend continues...**

Figure 36: Examples of solid shampoos, 2020-21

• **...from packaging to ingredients**

• **Protective claims**

ADVERTISING AND MARKETING ACTIVITY

• **TV advertising continues to take the lion’s share**

Figure 37: Recorded above-the-line, online display and direct mail advertising expenditure on women’s haircare, by media type, 2017-20

• **Leading manufacturers promote inclusivity**

Figure 38: Recorded above-the-line, online display and direct mail advertising expenditure on women’s haircare, by top advertisers and others, 2020

• **Sustainability initiatives continue to be important**

• **Nielsen Ad Intel coverage**

BRAND RESEARCH

• **Brand map**

Figure 39: Attitudes towards and usage of selected brands, March 2021

• **Key brand metrics**

Figure 40: Key metrics for selected brands, March 2021

• **Brand attitudes: John Frieda’s salon heritage makes it high quality**

Figure 41: Attitudes, by brand, March 2021

• **Brand personality: Cantu scores well for being ethical**

Figure 42: Brand personality – Macro image, March 2021

• **Masstige brands are considered indulgent**

Figure 43: Brand personality – Micro image, March 2021

• **Brand analysis**

• **Dove scores well for being ethical**

Figure 44: User profile of Dove, March 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £2195 | \$2995 | €2600

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

- **Batiste is considered fun**
Figure 45: User profile of Batiste, March 2021
- **OGX appeals to young women**
Figure 46: User profile of OGX, March 2021
- **John Frieda is glamorous**
Figure 47: User profile of John Frieda, March 2021
- **TRESemmé is a brand consumers are proud to be associated with**
Figure 48: User profile of TRESemmé, March 2021
- **Schwarzkopf Got2b is youthful**
Figure 49: User profile of Schwarzkopf Got2b, March 2021
- **Cantu is considered expert**
Figure 50: User profile of Cantu, March 2021

THE CONSUMER – KEY TAKEAWAYS

- **Vaccine renews hope in 2021**
- **Personalisation can add value**
- **Tapping into sustainability concerns can drive spend**

IMPACT OF COVID-19 ON THE BPC CONSUMER

- **Vaccine renews hope in 2021...**
Figure 51: Worry and extreme worry about the rise of being exposed to COVID-19, 28 February 2020–26 March 2021
- **...but spend on BPC remains muted**
Figure 52: Women’s spend on BPC compared with before COVID-19, 19–26 March 2021
- **The shift to online calls for improved accessibility**
Figure 53: Changes in online beauty/grooming purchases since the start of the COVID-19/coronavirus outbreak amongst women, June 2020
- **Lockdown impacts haircare habits**
Figure 54: Changes in women’s haircare routines, December 2020

HAIRCARE USAGE

- **Usage penetration sees little change**
Figure 55: Usage frequency of haircare products compared with a year ago, December 2020
- **Shampoo habits shift in young women**
Figure 56: Net usage of liquid and dry/no-rinse shampoo amongst women aged 16–24, December 2020
- **It’s all about caring**
- **Sustainability concerns haven’t impacted use of solids**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

HAIRSTYLING USAGE

- Users drop out of styling**
Figure 57: Usage frequency of hairstyling products compared with a year ago, December 2020
- Blur styling with care to drive usage**

INTEREST IN PERSONALISATION

- Focus on hair needs**
Figure 58: Interest in personalisation in haircare, December 2020
- Variation in hair calls for variation in haircare**
- Consumers know their concerns**
- Innovate by age for over-55s**
Figure 59: Interest in personalisation based on age in haircare, by age, December 2020
- Packaging and scent are lower drivers**
- Innovate by lifestage for a niche audience**

INTEREST IN INNOVATION

- Care + colour remains an area of interest**
Figure 60: Interest in haircare innovation, December 2020
- Drive sustainability at the ingredient level**
- Use of refills remains niche**
- Protect against the environment**
- Opportunities for hair sanitisers**
- Scalp microbiome attracts interest**

HAIRCARE BUYING BEHAVIOURS

- Online sees greater engagement**
Figure 61: Purchase of haircare products, December 2020
- Online retailers benefit in 2020**
Figure 62: Changes in haircare/styling product buying behaviours in the last 12 months, December 2020
- Savvy shopping behaviours have been strengthened**
- Brand loyalty remains high**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations**
- Consumer research methodology**

APPENDIX – MARKET SIZE AND FORECAST

- Forecast methodology**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.