

HAIR COLOURANTS – UK – 2024

Use of both at-home colourants and professional services has risen. Recruit new at-home users with grey-enhancing products and by encouraging experimentation.



Georgia Stafford, Beauty & Personal Care Analyst



Hair Colourants - UK - 2024

This report looks at the following areas:

- What drove growth in the value of the at-home hair colourants category in 2023
- How at-home hair colourants brands can respond to consumers returning to salons
- Consumer interest in the potential for hair health benefits in colourant innovation
- Varying consumer attitudes towards grey hair
- The impact of social media on demand for hair colourants and the potential for brands to engage with consumers on social platforms



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Overview

In 2023, as the cost-of-living crisis forced consumers to budget, there was increased usage of at-home hair colourants. Consumers used at-home products as salon alternatives or as a top-up between appointments. However, as the cost-of-living crisis eases, brands can recruit new users by encouraging experimentation.

Grey hair is losing the stigma it once carried and older consumers (who are more likely to have the hair shade) are less likely to be concerned about it. A more accepting view of grey hair removes a once prominent driver to use at-home colourants. However, it creates opportunities for more grey hair enhancing products.

Social media trends have become fast moving, creating more sources of inspiration for hair colour. A strong presence on social media allows brands participate in trends and show

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consumers how to achieve different hair colours, appealing to young consumers who are looking to express themselves via their hair colour.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

Opportunities for the at-home hair colourants market

- Revamp the reputation of hair colourants
- Disrupt brand loyalty to recruit new users
- Encourage experimentation to boost usage

Market dynamics and outlook

- The Five Year Outlook for at-home hair colourants
- Growth in the category will be slow
- L'Oréal brands see the largest growth
- Improving consumer confidence poses issues for at-home brands
- Respond to environmental concerns

What consumers want and why

- Usage of at-home hair colourants rose in 2023
 - Graph 1: usage of at-home hair colourant products in the last 12 months, 2022 and 2023
- A return to the salon
 - Graph 2: usage of professional hair colour services in the last 12 months, 2022 and 2023
- Sway brand loyal consumers with innovation
 - Graph 3: top three priorities when buying an at-home hair colourant product, 2023
- Infuse haircare ingredients in hair colourants
 - Graph 4: interest in innovation of at-home hair colourant products, 2023
- Stress the link between hair and identity
 - Graph 5: attitudes towards hair colourants, 2023

Innovation and marketing

- Disrupt the typical packaging themes in the hair colourants category
- Longstanding brands put hair health centre-stage
- Brands highlight individuality to appeal to consumer attitudes

MARKET DYNAMICS

Market size

- The home hair colourant category breaks the trend of value decline
 - Graph 6: retail value sales of home hair colourants, 2017-23 (est)
- Shifting salon behaviours impact growth
- Shifting salon behaviours impact growth
- An appetite for experimentation benefits the category

Market forecast

- Innovation is needed to fuel growth
- The appeal of salon services threaten future growth of at-home colourants
- Look to the haircare category for growth opportunities
- Simplifying hair colour application could increase value sales
- Patterns from the last income squeeze have not repeated
 - Graph 7: retail value sales of home hair colourant products, 2009-14

Market segmentation

- A return to salons is reflected in the performance of bleach
- Permanent hair colour grew above the category
- Social media inspires temporary colourant usage

Market share

- Major brands perform well as the category picks up
- New launches from Just For Men help it grow ahead of the market
- Magic Retouch goes viral
- L'Oréal brands outperform

Channels to market

- Increased brand availability proves successful for H&B retailers
- Boots increases access to premium brands
- Opportunities for education in supermarkets
- Online-only beats brick and mortar on availability

Macro-economic factors

- Consumer confidence is improving
 - Graph 8: the financial confidence index, 2016-23
- A decline in CPI has its benefits and drawbacks for at-home colour
 - Graph 9: CPI, 2023

- An ageing population creates opportunities for grey hair products
- Address environmental concerns
- Tackle taboos to drive usage
- Inclusivity is the expectation
 - Graph 10: retailer responsibilities relating to diversity/inclusion in BPC, 2022
- The 'anti-beauty' trend
- Microtrends are too quick for NPD to keep pace

WHAT CONSUMERS WANT AND WHY

Usage of at-home hair colourant products

- Consumers are open to experimenting with hair colourants
- Overall usage of at-home hair colourants has increased
 - Graph 11: usage of at-home hair colourant products in the last 12 months, 2022 and 2023
- Make colour-enhancing shampoos appropriate for more hair shades
- Facilitate easy experimentation for all hair types

Frequency of at-home hair colourant usage

- Boosting usage frequency can encourage spending
 - Graph 12: frequency of at-home hair colourant product usage in the last 12 months, 2023
- Prove the value of top-up products

Usage of professional hair colour services

- A return to the salon
 - Graph 13: usage of professional hair colour services in the last 12 months, 2022 and 2023
- Tap into hybrid colouring behaviours
- Make the hair colour process less intimidating

Average spend on an at-home hair colourants

- Mass price points reign supreme in at-home hair colourants
 - Graph 14: average spend on an at-home hair colourant product in the last 12 months, 2023
- Professional recommendations and familiarity are more important to high spenders
- Consumers find value in natural claims
- Budget buyers are experimenting

Priorities when buying at-home hair colourants

- Disrupting brand loyalty is key to driving usage
- Sway brand loyal consumers with innovation
 - Graph 15: top three priorities when buying an at-home hair colourant product, 2023
- Long-lasting claims promote value

- Stand out with natural ingredients
- Use promotions to secure brand loyalty
- Incentivise customers to spread the word

Interest in at-home hair colourant product innovation

- Hair health benefits can boost usage
 - Graph 16: interest in innovation of at-home hair colourant products, 2023
- Added benefits can increase usage and trade ups
 - Graph 17: interest in innovation in at-home hair colourants, 2023
- Appeal with bond-building ingredients
- Remove hair health barriers to colouring
- Solutions to ageing hair are sought in colourants
- Be inclusive of different hair types
- Help hide hair loss

Attitudes towards hair colourants

- Encourage consumers to explore their personal style
- Recruit new users by encouraging self expression
 - Graph 18: attitudes towards hair colourants, 2023
- Engage salon goers in the category
- Promote the professional expertise of brands
- Fuel the appetite for experimentation with social media discovery
- Older consumers are less preoccupied with grey hair
 - Graph 19: agreement that getting/having grey hair is a concern, by age, 2023

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- New brands and collaborations encourage experimentation
 - Graph 20: launch activity in the at-home hair colourants category, by launch type, 2019-23
- New brands and collaborations feed an appetite for experimentation
- Zara launch a holiday party hair colourant
- L'Oréal puts hair health first
 - Graph 21: launch activity in the at-home hair colourants category, by ultimate company, 2022-23
- Wella plex technology improves perceptions
- Give a why to natural claims
 - Graph 22: launch activity in the at-home hair colourants category, by top 10 claims, 2021-23
- Ease of use claims will increase accessibility

Advertising and marketing activity

- Individuality is the go-to theme for TV advertising
- L'Oréal promotes a new approach to hair colour
- eSalon positions itself as a salon alternative
- Schwarzkopf is a top spender
 - Graph 23: Total above-the-line, online display and direct mail advertising on at-home hair colourants, January-October 2023
- The Unseen collaborates to spark creativity

BRAND RESEARCH

- John Frieda is well-known thanks to its haircare line
 - Graph 24: usage and awareness of hair colourant brands, 2023
- Encourage peer recommendations
 - Graph 25: key metrics for selected brands operating in hair colourants, 2023
- Josh Wood Colour is perceived as fun
- Garnier Good is perceived as natural
- John Frieda is known for its expertise
- L'Oréal Magic Retouch's applicators help its accessible reputation

APPENDIX

Supplementary data

- Population estimates

Market forecast data and methodology

- Market size and forecast: constant and current prices
- Market forecast: prediction intervals
- Forecast methodology

Report scope and definitions

- Market definitions
- Abbreviations and terms

Methodology

- Consumer research methodology
- Nielsen Ad Intel coverage

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