

HAIR COLOUR – INDIAN CONSUMER – 2020

Post its recovery from COVID-19, hair colourants can look at resuming its growth by looking beyond grey coverage.



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Report Content



EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- Impact of COVID-19 on hair colourants
- India is the global bright spot for hair colourants
 - Graph 1: Hair colourant launches for top 10 markets by top five claims, Jan 2019-Mar 2020
 - Graph 2: Hair colourant launches, Jan 2017-Dec 2019
- Grey coverage is currently the main focus for India
 - Graph 3: Hair colour launches with the word grey as a % of the total hair colour launches, Jan 2017-Dec 2019
- Hair colourants need to tap new audiences to grow

WHAT CONSUMERS WANT AND WHY

- Non-users outnumber users
 - Graph 4: Reasons for hair colour usage among men of different age groups, Dec 2019
 - Graph 5: Reasons for hair colour usage among women of different age groups, Dec 2019
- Introducing the three user groups for hair colourants:
- Non-users want: The latest global trends
- Fashionable users want: New formats which drive convenience and include natural ingredients
- Grey consumers want: Convenient solutions to cover greys

OPPORTUNITIES

- Encourage fashion colour usage with the young non-user via online
- Leverage the fashionable user's experimental quality
- Provide easy-to-use solutions for the grey consumer

COMPETITIVE LANDSCAPE

- Innovations entice the hair colour consumer

MINTEL PREDICTS

- The category is expected to return to normalcy

IMPACT OF COVID-19 ON HAIR COLOUR

- The outlook for the Indian hair care industry
- The outlook for the Indian hair colourants industry
- The impact of COVID-19 on hair colourants
- The impact of COVID-19 on hair colourants – SWOT analysis
 - Graph 6: "Compared to your usual spending habits, do you expect to spend more, less or about the same in each of the following categories over the next month?", 22-28 May, 2020
- Change in consumer behavior and what brands can do
- The marketing mix – product
- The marketing mix – price
- The marketing mix – place
- The marketing mix – promotion
- In summary: Adapting to the new normal

KEY TRENDS

- What you need to know
- Grey coverage is currently the main focus for India
- Grey coverage is currently the main focus for India
 - Graph 7: Hair colour launches with the word grey as a % of the total hair colour launches, Jan 2017-Dec 2019
- The older cohort are the primary target
 - Graph 8: Reasons for colouring hair in the last 12 months, Dec 2019
- Brands are also driving convenience...
 - Graph 9: Top five claims in hair colourant launches, Jan 2017-Dec 2019
- ...in all hair colourant formats
- Bolder, brighter shades appeal to the youth
- Hair colour trends pushed by salon professionals
- Celebrities are used as aspirational influencers

KEY DRIVERS

- India shows potential to grow
- India is the global bright spot for hair colourants
 - Graph 10: Hair colourant launches for top 10 markets by top five claims, Jan 2019-Mar 2020
 - Graph 11: Hair colourant launches, Jan 2017-Dec 2019
 - Graph 12: Top five retail hair colourant markets, US\$ bn, 2020
- India is a growing market, but needs to be more proactive in launches

- Market leaders do not limit focus to grey coverage
 - Graph 13: Hair colourant launches with 'grey' as a keyword, Jan 2017-Dec 2019
- Trendy, temporary and instagrammable colours drive global markets
 - Graph 14: Median age by 2022
- Appeal to the youth with fashion hair colours
- Self-grooming products see a surge in the lockdown

Global trends and how they are playing out in India

- Temporary colourants currently meet the demands of the time-pressed consumer

CONSUMER INSIGHTS

- What you need to know
- Who are hair colour users and non-users?
- Non-users outnumber users
- The older cohort dominates hair colour usage
 - Graph 15: Reasons for colouring hair, Dec 2019
 - Graph 16: Reasons for hair colour usage among women of different age groups, Dec 2019
 - Graph 17: Reasons for hair colour usage among men of different age groups, Dec 2019
- Introducing the three user groups for hair colourants:
- Usage differs between the fashionable user and grey consumer
- Appeal to the fashionable user with new, trendier formats
 - Graph 18: Hair colouring formats used by fashionable users vs grey consumers, Dec 2019
- Grey consumers have a greater need for hair colouring
 - Graph 19: Frequency of hair colouring between fashionable user vs grey consumer, Dec 2019

The non-user

- Who is the non-user?
 - Graph 20: Working situation of non-users aged 18-34 across city tiers, Dec 2019
 - Graph 21: Social media usage among hair colour non-users aged 18+, Dec 2019
 - Graph 22: Engagement with social media across women and men non-users aged 18-34, Dec 2019
 - Graph 23: Male and female non-users across regions, Dec 2019

The fashionable user

- Who is the fashionable user?
 - Graph 24: Hair colouring formats used by the fashionable user, Dec 2019
- Increase usage by ensuring damage protection via natural ingredients
- Drive in-salon usage during special occasions

The grey consumer

- Who is the grey consumer?
- This cohort is purely driven by grey coverage
 - Graph 25: Hair colouring formats used by grey consumers, Dec 2019
- Temporary formats can encourage this user to experiment

MARKET APPLICATIONS

- Opportunities: Key areas of focus

How to target the young non-user

- Tap students with products that give instant gratification
- Blur with 'makeup' to target the youth
- Formats can take inspiration from makeup

Increase usage with the fashionable user

- Foam as a texture can convey convenience
- Trending jelly textures provide an opportunity
- Include natural ingredients to drive protection
- Added benefits can supplement aftercare
- Natural oils communicate protection
- Offer experimentation without commitment to express individuality
- Demand for customisation is strong
- Personalised hair colour kits can help maintain client relations and bottom line

Convenient formats will appease the grey consumer

- Bring practical features to your packaging to drive convenience
- Temporary formats can see success
- An acceptance of grey in self-isolation may continue post-COVID-19

Local innovations

- Streax Ultralights Highlighting Kit extends range to electric colours

Global innovations

- Hair cushions make an impact in South Korea
- Temporary touch-ups extended to a shadow
- Changing hair colours can entice the youth

APPENDIX

- Consumer survey methodology

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