

HAIR STYLING – INDIAN CONSUMER – 2021

With at-home trends at its peak, hair styling can start the journey to segmentation by creating better-for-you solutions.



Tanya Rajani, Principal Analyst, Beauty & Personal Care, India



Report Content



EXECUTIVE SUMMARY

- What consumers want
- Mintel's perspective

Market context

- Impact of COVID-19 on hair-styling trends
- India's consumer priorities shift in tune with global ones
- Rise of the multi-faceted modern man
- Conscious consumption reaches fever pitch
- As consumers embrace their identities, demand for personalised solutions rises

What consumers want and why

- Consumers want: a clean and professional finish at home
 - Graph 1: grooming products used in the last six months, % of consumers, April 2020
- Consumers want: products and tools that are safe for hair
- Consumers want: wash off easily styling options
 - Graph 2: percentage of consumers' interested features of hair-styling products, 2021

Opportunities for hair-styling products

- Incorporate wellness and additional care benefits into styling products
- Leverage digital influence circles to celebrate unique identities
- Offer easy usage options and multi-channel guidance
- Demand for natural/clean products will attract users back to authentic, traditional ingredients

Competitive landscape

- Innovation speed up to capture new consumers

Mintel predicts

- Inclusion, innovation and protection will be the keywords for brands seeking to eliminate consumer concern and drive product adoption

IMPACT OF COVID-19 ON HAIR-STYLING TRENDS

- The outlook for the Indian haircare industry
- The outlook for the Indian hair styling industry
- Pricing concerns will route brands towards making in-roads into value-based and multipurpose claims
- Consumer scepticism will force brands to validate their claims

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- SWOT analysis: the impact of COVID-19 on hair-styling products
- The marketing mix: product
- The marketing mix: place
- The marketing mix: price and promotion
- Impact of COVID-19 on hair-styling products: Mintel's perspective

KEY DRIVERS

- Consumers seek 'wellbeing' cues in their consumption choices
- The role of 'experiences' in consumer decision making is becoming more pronounced
- New-age brands are responding to 'identity' with inclusive products and messaging
- Brands fostering inclusion are acknowledging unique needs and identities
- Modern consumers seek assuring yet convenient at-home routines

KEY TRENDS

- Higher adoption of environmentally friendly products and 'clean beauty'
- Global trends indicate private labels are set for growth

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- The growing digital shift is expanding the role of 'influentials'
- 'Man in the Mirror' – brands are addressing the new-gen male consumer
- The need for massages and wellness-based products are evolving
- 'Survival skills': Indian consumers readily adopted at-home styling activities during the lockdown

CONSUMER INSIGHTS

Key categories and usage patterns

- General usage patterns of hair-styling cosmetics/products
 - Graph 3: usage of hair-styling products in the past 12 months, 2021
- General usage patterns of hair-styling tools
 - Graph 4: usage of hair-styling tools in the past six months, 2021
- North and South regions leading in adoption and consumption trends
 - Graph 5: % of consumers who have used the given hair-styling products at least once in the last six months
- Working professionals show higher usage and expect lasting results
 - Graph 6: % of consumers who use the given hair-styling products once a week
- Opportunity exists for hair oils in out-of-home and special occasion usage
 - Graph 7: % of consumers who have consumed the given hair-styling products with any usage and only on special occasions

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Millennial and Gen X consumers (aged 25-44)

- Gen X constitutes the 'heavy' consumer group
 - Graph 8: usage of hair-styling products, by age group, 2021
- Millennials and Gen X show highest category-wise penetration
 - Graph 9: % of consumers who consume the given hair-styling products once a week
- Millennials and Gen X show highest category-wise penetration
 - Graph 10: hair-styling product usage a few times a week, by age, 2021
- Salon-like finish at home: a top priority
- Millennials: most likely to be influenced by beauty bloggers
- Millennials: concerns around damaging after-effects

The men's hair styling segment

- Hair-styling products' consumption penetration across regions
 - Graph 11: % of male consumers who have used the given products in the last 12 months, 2021
- 'Heavy' usage* among men comes at close quarters with women
 - Graph 12: % of consumers who consume the given hair-styling products a few times a week, 2021
- Functional benefits attract the male consumer
- Purchase triggers among men: satisfying the need for easy, multipurpose, affordable options
- Peer circles and online mediums help create referrals
 - Graph 13: influencing factors to hair-styling product choice, 2021
- Emergence of male beauty and online influencers
 - Graph 14: percentage of consumers influenced by given factors to try a hair-styling product in the last 12 months, 2021

Key triggers and barriers to purchase

- Common purchase triggers among different consumer groups
- Overcoming perceptions that create barriers to purchase

MARKET APPLICATIONS

- Promote 'safe for you' features and ingredients

Addressing the needs of Gen X "heavy" consumers

- Promote wellness and stress-relief claims, especially in case of hair oils
- Bring the salon-finish closer to home
- Combine hair styling with haircare rituals

Speaking to young consumers

- Address the growing demand for low-effort, time-saving products
- Godrej banks on trendy ingredients
- Level up on ingredients for the digital age

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- Natural and free from harmful chemicals remains high on the agenda
- Vegan rises to meet consumers' needs for safety reassurances
- Innovate with textures and usage formats
- Generate buzz by reissuing new formats
- Create new usage scenarios with boundary-pushing formats
- Rekindle consumer relationship with Ayurveda
- Challenge consumers to digital contests to spark interest
- Take a cue from successful digital campaigns and contests
- Celebrate identity with made-for-Indian hair

Creating hair-styling usage habits in men

- Add easy-to-wash-out claims to multi-purpose products
- Brands targeting men are championing multi-purpose, easy-to-use claims
- Offer on-pack instructions and multi-platform guidance
- Include styling tools and applicators to boost at-home use

Target purchase triggers through designed messaging

- Leverage 'safe for hair' as a trust factor
- Hair-styling tools: positioned as 'safe' to increase adoption and gain trust
- Add "protection from" claims
- Go beyond cardinal benefits to address needs of modern urban consumers
 - Graph 15: consumer preference for hair-styling products, 2021
- Brands taking the 'beyond basic' route
- Speak to "woke" consumers about their consumption impact
- Make trendy hair styles and a salon-like finish accessible at home
- Play up local community ties as next stage sustainability plans
- Assist consumers in their purchase journey through multiple touchpoints and omni-channel support
- Leverage micro-influencers to alleviate consumer concerns and win users

WHO'S INNOVATING

- Making Ayurveda convenient: TruHair
- Ingenious 'Indie' hair styling accessories

GLOBAL INNOVATIONS

- Keratase – re-styling made easy
- Hair tools undergo an era of invention
- New-age tools to aid hair rituals

APPENDIX

- Consumer survey methodology

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01

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