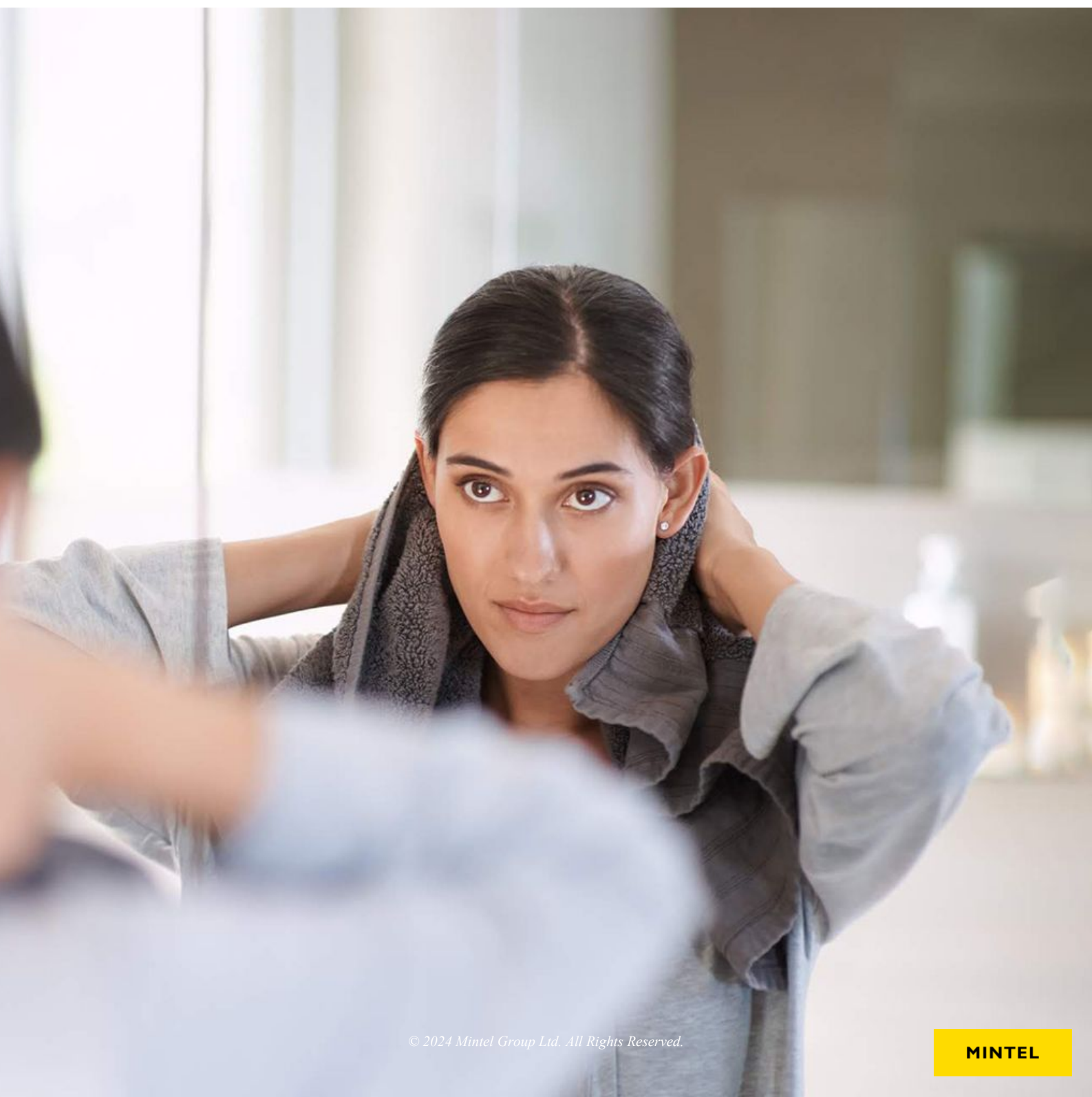


HAIRCARE ROUTINES – INDIAN CONSUMER – 2018

Re-establish the 'care, cleanse and style' regimen in haircare. Take inspiration from traditional haircare ingredients to appeal to the modern urban Indian.



Rimpie Tulsiani, Sr. Beauty
& Personal Care Analyst,
India



Report Content

EXECUTIVE SUMMARY

- What you need to know – Summary
- Establish time-saving haircare regimes for modern consumers using 'back-to-root' ingredients
- Build on established natural haircare ingredients from India, but in modern formats
- A plethora of product formats exist for brands to cash in on consumers' interest in going back to the basics of haircare
- Give men preventive solutions to balding as part of their regular haircare routine
- Promote usage of hair oil vs regular oil by highlighting benefits, especially among women
- Educate consumers about conditioner's protective and styling function
- Innovate multi-functional products to streamline haircare routines
- Expand the range of multi-functional haircare products to help consumers save time
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Boost natural and Ayurveda ingredients for haircare
- Hair product claims: Global vs India
- Hair treatments, men's styling products drive the category as well
 - Graph 1: Hair product launches, by male claims, 2018* (up to June 2018)
- Private label in hair treatments drives the haircare segment
- Private label

Global trends and how they are playing out in India

- Go back to basics, naturally
- Hair wash comes full-circle with back-to-basics formats and ingredients
- Hair products launched in traditional formats in India vs global counterparts showcase the back-to-basics approach
- Appeal to consumers' time management goals
- Connect with consumers by stating the time/speed factor to establish transparency and trust

CONSUMER INSIGHTS

- What you need to know

Hair appearance: Time spent and factors

- Appeal to city dwellers with environmental protection and time-saving claims
 - Graph 2: Mean time spent in minutes on hair appearance, by gender and tier, April 2018
- Target men with multi-functional products, and women with a haircare kit
 - Graph 3: Number of haircare products used, by gender, April 2018
- Encourage a regime with the 'three-product kit' as a must-have for women
 - Graph 4: Mean time spent on haircare, by number of haircare products used, April 2018
- Offer a range of varied time-based hair products/kits targeted at women
 - Graph 5: Time spent by women on hair on an average day, by age, April 2018
- Talk 'stress-combating' benefits for women and 'regular' usage benefits for men when it comes to haircare products
 - Graph 6: Factors that most impact hair appearance, by gender, April 2018

Understanding product usage: Oil-shampoo-conditioner

- Inject styling products with a drop of caring element
 - Graph 7: Products used on hair, by gender, April 2018
- Promote presence of shampoo in the bathroom as the first step to 'haircare'
- Hair product hierarchy: Shampoo-regular oil-conditioner/hair oil
- Position conditioners as essential 'nourishment' for hair with innovation in product and packaging
- Help consumers 'make a date' with conditioner more often
 - Graph 8: Product usage, by household groups, April 2018
- Presence of a maid/housekeeper impacts conditioner usage

The oil story: Oil users vs non-users

- Emphasise oiling's beneficial features to retain users
 - Graph 9: Oil users vs non-users, by region, April 2018
- Offer an antioxidant-rich hair oil that helps combat the effects of everyday pollution and stress
 - Graph 10: Select factors that impact hair appearance, by oil users vs non-users, April 2018
- Offer haircare products with 'natural' ingredients for oil users
 - Graph 11: Select attitudes towards haircare, by oil users vs non-users, April 2018
- Demographic profile: Oil users vs non-users

MARKET APPLICATION

- Opportunities: Key areas of focus

Opportunities

- Introduce home remedies in a ready-to-use packaged format
- Leverage shampoo usage to bundle haircare products to form part of the grocery basket
- Take haircare/treatments beyond oil format

Who's innovating

- Offer thematic bundling: fruits for your skin and hair
- Embark on 'oil version 2' as nourishing food for hair: draw inspiration from the food category
- Establish a pre-wash/post-wash routine for oil and other nourishing products
- Reinventing oiling's image and communicating its benefits

Global innovators

- Shampoo with oils: India's export of oiling tradition
- Oil seeps into pre-wash, in-wash and post-wash products
- Probiotics lead the way for scalp health
- Draw inspiration from new formats of hair treatment for Indian consumers
- Leave-in hair products would help consumers speed up their haircare regime
- Look to South Korea for advanced hair products

APPENDIX

- Consumer survey methodology
- Glossary

MINTEL INDIAN CONSUMER - OTHER REPORTS AVAILABLE

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- ✓ Understand the Indian market and see how it fits into wider trends on a local and global level.
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