

# haircare

2024

OUR SELECTED TRENDS,  
INSIGHTS & OBSERVATIONS

ftb.

## CROWSNEST

*trend horizons*



8 75 1 cup  
1/2 Teaspoon Salt  
1/2 Ki Card / Soda  
1/2 " Clean Tartan  
1/2 an Egg  
2 Teaspoons Golden Syrup  
1/2 pt (Scant) Soda  
1 please C. et  
Sift Dry  
mix to smooth  
heat pan, press  
batter in in Va





# Welcome

With key factors from sustainability to diversity and inclusion on the minds of every major brand and retailer on the planet, the beauty, health and wellness world is finally catching up with the nuances of what it takes to deliver truly personalised products that meet the individual demands of consumers today.

Haircare is certainly no exception.

Long have the majority of women and men whose hair falls outside of the 1a - 2c categories struggled to find solutions which meet the specific needs of their hair. They have relied upon traditional, niche brands shared by their communities. However, innovation from independent brands and start-ups has fuelled a renaissance in the space, prompting major household-name brands to recognise the power in catering to this significant group of individuals with major spending power.

Furthermore, we see the power that generations beyond the Zers hold, not only in their spending, but their specific demands. They are seeking functionality, they are seeking elevated branding, they are seeking quality.

These factors demanded of customers across generations - who are also more informed and educated than ever before - means that brands must step up their game. They must recognise how major trends are driving customers across generations, across type-specific hair, across genders.

We welcome you to explore how major trends are moving the industry forward into 2025, through the eyes of unique consumer attitudes.

## \$213bn

The global haircare market will reach \$213.47 billion by 2032, growing at a compound annual growth rate (CAGR) of 10.4% from 2024 to 2032.  
*Fortune Business Insights, 2024*

## \$19.8bn

The United States market alone is estimated at \$16.73 billion in 2024, and forecasted to reach \$19.87 billion by 2029, with a CAGR of 3.49%.  
*Mordor Intelligence, 2024*

## \$4.5bn

The black haircare market in the US "is expected to be worth around \$4.5 billion by 2032", rising from \$2.9 billion in 2022 and growing at a CAGR of 4.1%.  
*Market.US, 2024*

## 29%

Almost a third of people with "coily, kinky or curly hair" in the UK say they find it challenging to source haircare and styling products for their hair type.  
*Mintel, 2024*

## 28%

Hair health is being prioritised more than ever before; 28% of customers are seeking to improve their hair health more often now than prior to the pandemic.  
*Glossy, 2022*

## 62.5%

Over half (62.5%) of those who experience Covid-19 "developed hair-related signs and symptoms", including hair thinning.  
*Journal of Medicine and Life, 2022*



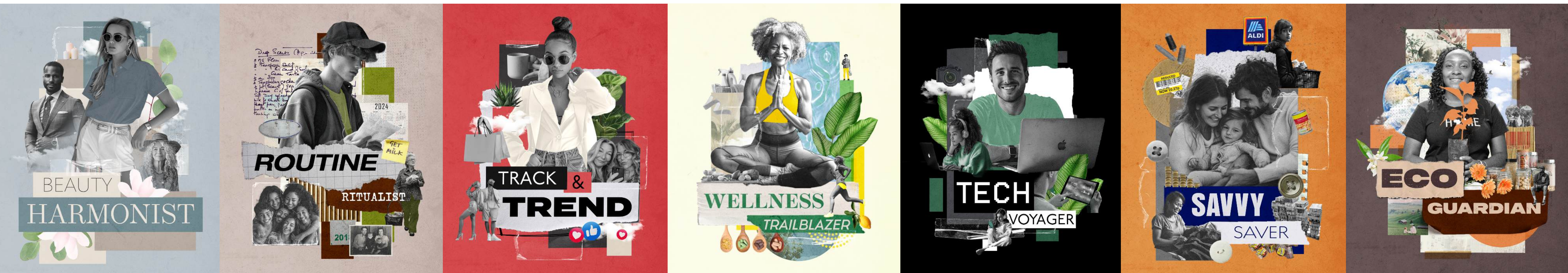
# Introducing the attitudes

Here at Free The Birds we don't believe your physical age defines you. We believe not in demographics, but 'emographics'. The way you behave, the way you think, the way you view the world, says more about you than the number of candles on your birthday cake.

Age-related pigeon-holes are dangerous things to fall into if you're a marketer. There could be consumers who you aren't reaching simply because they were under or over an age limit - even though they potentially relate to your brand. As a result, our trends insights are related to consumer attitudes not age.

We believe that this perspective will prove to be more reflective of human nature and much more inspiring. It certainly is when we are briefing our creative teams. We find that designing and writing for an attitude produces a much stronger connection with the intended consumer.

So, we hope you enjoy seeing all the exciting and thought-provoking new ideas in hair care, seen in the context of a variety of consumer attitudes. We feel sure that some of those attitudes will be very familiar to you. And very valuable.



We have created seven consumer attitudes within hair care.  
All equally relevant and tribes you should be targeting.



# Introducing the attitudes

The Beauty Harmonist is one who seeks beauty within and out, seeking the highest quality in their purchases; highly efficacious ingredients housed within chic, elevated packaging.

The Routine Ritualist adheres strictly to their daily routines and habits. This includes purchasing products that align with their accustomed standards, and choices often born of habit and often inherited from their parents.

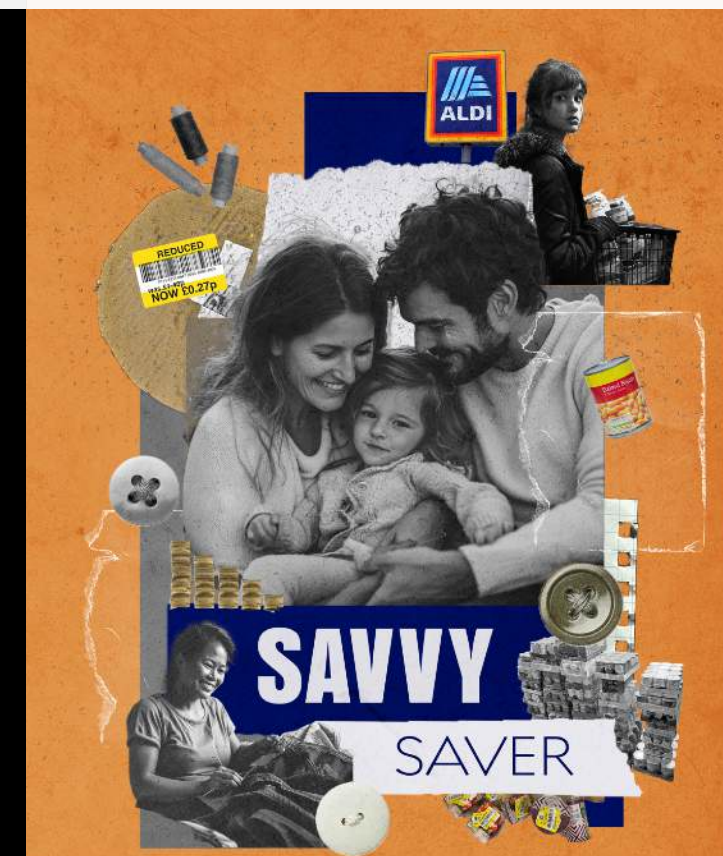
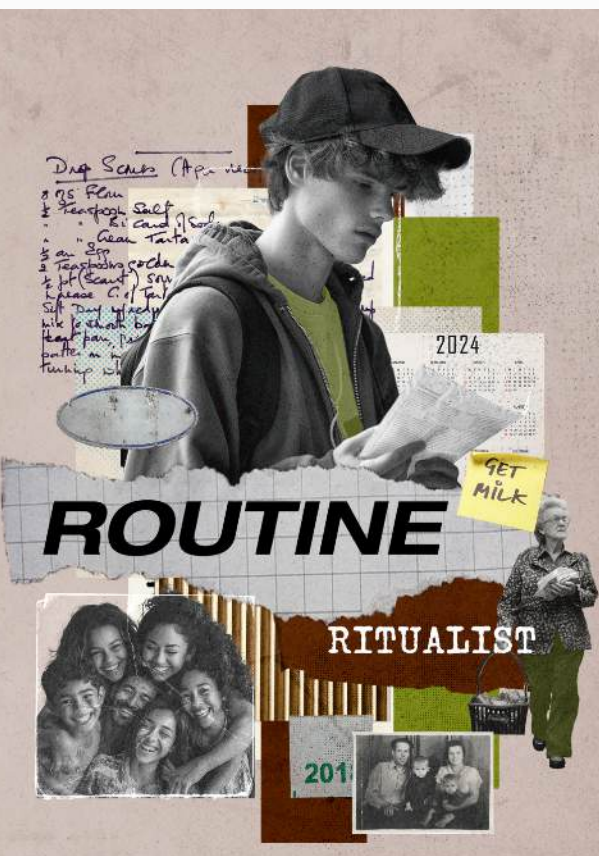
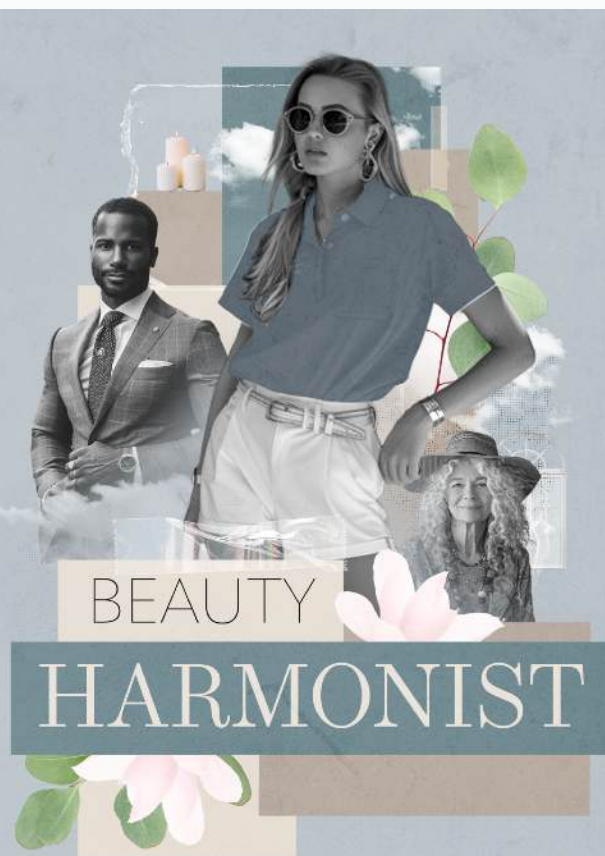
This pursuer of the popular, the Track & Trend diligently follows the latest trends in both household-name and independent, emerging products, believing that conformity to products which are in-demand is the best course of action.

The Wellness Trailblazer prioritises health and tranquility in every aspect of their personal care regime. This includes products they choose for their own and their loved one's personal routines, promoting wellbeing alongside their primary functions.

On a consistent and committed journey through the realm of technology, the Tech Voyager explores advancements and innovations with dedication and enthusiasm in their everyday life.

Driven by a necessary desire to reduce unnecessary spending, the Savvy Saver's purchasing decisions are based upon value for money, from the cheapest option available to capitalising on deals of the moment, or strategic purchases which save them money over time.

Dedicated to protecting and preserving the environment, the Eco Guardian actively seeks to safeguard our planet through a commitment to sustainability in daily choices and consumption habits.



BEAUTY HARMONIST

ROUTINE RITUALIST

TRACK & TREND

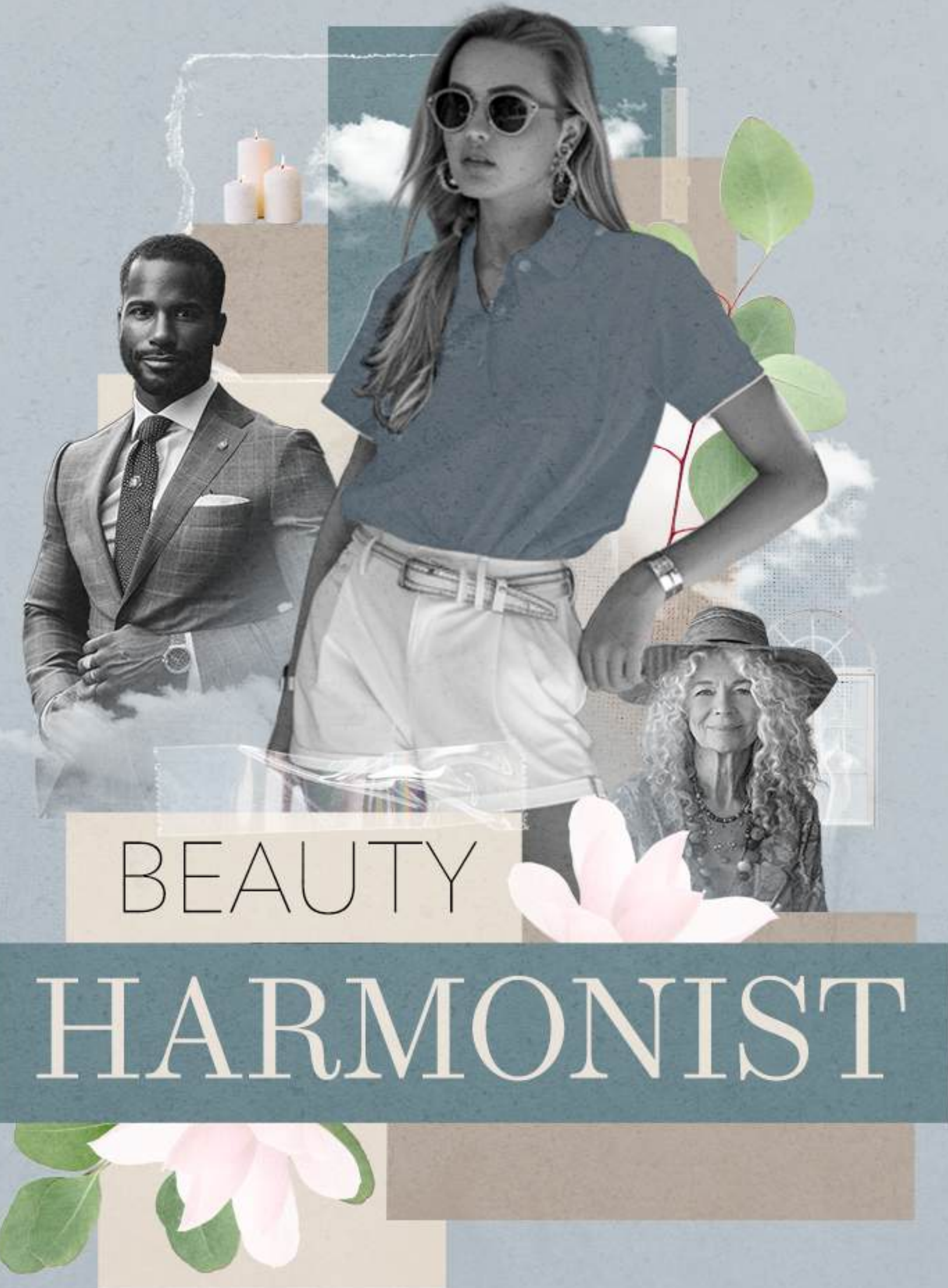
WELLNESS TRAILBLAZER

TECH VOYAGER

SAVVY SAVER

ECO GUARDIAN





CONSUMER ATTITUDE

# The Beauty Harmonist

Striving for beauty in every aspect, from personal use products to the aesthetics they cultivate in their home, the Beauty Harmonist purchases with the intention of enhancing the beautification of their day to day lives and experiences.

Aesthetic-driven • Beauty-focused • Harmonious • Intentional • Stylish  
• Design-conscious • Environment-enhancing • Mindful • Detail-oriented •  
Curated



**The Beauty Harmonist is one who seeks beauty within and out, seeking the highest quality in their purchases; highly efficacious ingredients housed within chic, elevated packaging.**

The pursuit of these high end products speaks to their spending power, as the consumer group that is least affected by the cost of living crisis. However, this attitude also counts customers amongst its ranks who form dedicated bonds with specific haircare brands. These brands are known for their quality and status within the industry. Their brand loyalty sees the Beauty Harmonist making committed investments in their beauty and haircare regime.

For this consumer, the health of their hair is a significant part of how they express their personality to the world. They therefore prize luxury, aesthetically-pleasing packaging, proudly displayed in their bedrooms and bathrooms.

The growth of scalp care movements and products which support the health of their hair is prominent amongst the Beauty Harmonists - although these products must take nothing away from a lightweight, freshly washed and coiffed appearance. This is further supported by a passion for luxury supplement brands which support the health of their hair.

Additional nuances of layered scents, harmonised routines and highly-aesthetically-pleasing packaging defines the Beauty Harmonist and their relationship with haircare.

This is also married with sustainability and science. The Beauty Harmonist will research to ensure their investment is of the greatest quality, every ingredient and component selected with purpose by the brands they trust to deliver beautifully for them.

Hair thinning has been listed as one of the leading physical issues affecting the confidence of women in the US, with nearly a quarter of (23%) reporting this issue.

*Nutrafol, 2023*

In 2023, ageing hair was named as the leading global hair concern, shared by 58% of people. This was followed by damaged hair at 54%, and scalp problems at 42%.

*Euromonitor, 2023*

Consumer spend across the globe was highest on anti-ageing products in 2022, including hair dye and hair loss products.

*Euromonitor, 2023*

Almost half of Americans (49%) are willing to spend more on haircare products which they know work for them.

*Circana, 2022*

While 73% of men have suffered from hair thinning and/or loss, 75% of women have reported this same issue. 95% of women “have tried to cure it or cover it up”.

*Hair Gain, 2022*



# Influencing trends

## Through thick and thin

In recent months there is growing conversation and acknowledgement of the effects hair density and loss has on women. The rise of this trend is fuelled by a combination of understanding of the connection between the mind, stress and hair health. Additionally, growing destigmatisation of the menopause and awareness of its affect on hair loss, plus factors such as post-Covid hair loss.

Haircare which supports regrowth will become more widely discussed and more readily available for the growing number of individuals facing this challenge. This includes technology which can boost growth.

Success for brands will be achieved in uniting this trend with the growing demand for personalisation, catering to specific causes or periods of life which can lead to hair thinning. Branding and marketing which speaks openly on the topic and supports tackling the taboo will also be key.

*Aligns with:*  
Tech Voyager

## Soften your shower

Depending upon the rocks and soil water is filtered through before it arrives in the pipes of your home, certain minerals and metals are added which leads to hard water that is harmful to our hair and scalp.

These minerals react with soap to form a kind of buildup referred to as "soap scum". This leaves a dull, dry appearance, can clog follicles, and can be very difficult to wash out effectively.

Innovation will flourish in this space as we enter 2025, with a growing number of products catering to the risks which hard water poses.

Products which can offer a detox for our hair feature ingredients capable of breaking down metals and minerals. In addition, water systems which can be added to our shower will become increasingly available and at lower costs, and support the natural addition of hard water management to haircare routines.

*Aligns with:*  
Wellness Trailblazer

## Lighter than (h)air

A mousse revolution is taking place as brands offer innovation in the delivery and packaging of volumising formulations.

This innovation is helping mousse to compete with dry shampoo in giving lift to second-day (and beyond) hair.

Aerosol-free alternatives are helping to achieve the airiness desired, whilst avoiding the dreaded curl crunch. Additions to formulations such as oil-absorbing ingredients help to prevent the hair from being weighed down.

These products also make some of the hottest styles predicted for 2025 manageable - the wispy fringe, the slick back, and statement waves.

New multi purposes mousses are also helping to contribute to the nourished health of individual hair strands, meeting growing demands for multi-functional products.

*Aligns with:*  
Track & Trend



# Reviving roots, rewinding time

*Disruptive technologies are changing the game when it comes to supporting and overcoming the effects of ageing and genetics in hair care. Today these game-changing solutions are more readily available, and can be applied topically.*



## **CosmeRNA**

Born in South Korea and now available in Europe, this award-winning breakthrough brand targets the genetic causes of hair loss, targeting the androgen receptor protein, using siRNA (small interfering RNA) technology - reportedly the first brand to employ this form of technology, with clinically-proven results. By interacting with messenger RNA, the topical product can “block gene expression”, preventing expression of the androgen receptor gene which at the hair follicle, can shorten the growth phase of hair. Strengthening the follicles, CosmeRNA promises “thicker, fuller, and healthier hair”.

23%

The percentage of US women who report hair thinning as one of the leading physical issues affecting their confidence.

95%

95% of women have tried to cure or cover up hair thinning and hair loss.

58%

In 2023, ageing hair was named as the leading global hair concern, shared by 58% of people.



## **KORE**

Another award-winning brand celebrated for its anti-ageing haircare capabilities. This cellular haircare range comes from Hong-Kong's highly innovative SHHH group. Pioneers in biotechnology, the KORE range supports scalp care through advanced, high performance ingredients. The Regenerative Scalp Toner uses a specialised combination of patented Pycnogenol, LPS Compounds and Turmeric Plant Stem Cells to support microcirculation and strengthening. The Bio-Renew Scalp Ampoules uses the groundbreaking Spider Silk Protein, capable of stimulating collagen and hyaluronic acid synthesis at the scalp.



# Go ~~hard~~ or go home

*With 60 - 85% of households in countries from the US to the UK, and parts of Europe and Asia affected by hard water in the home, we are seeing exponential growth of solutions which reduce the harmful effects it can have on the health of our hair.*

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## Act + Acre

Shower heads which help to filter out minerals in our water systems have not always been warmly welcomed, reporting difficulties with water pressure, a lack of results, and difficult installation. The Act + Acre shower head promises to remove “both physical and chemical debris from water without compromising water pressure”, through 12 different filtration systems. The proprietary blend of layers includes Calcium Sulphate to filter chlorine and chloramines which can dry out hair, coconut-activated carbon to eradicate water odour, and KDF-55 (Kinetic Degradation Fluxion) which supports scalp microbiome by removing excess bacteria, algae, and water soluble metals.



## Hello Klean

Another brand celebrated for its hard water shower ecosystem, Hello Klean accompanies its shower technology with a range which maximises its effects. Vegan, cruelty-free and crafted without sulphates or parabens, the Hard Water shampoo lifts harmful minerals from the hair through its formulation of oat protein, lactic acid, bamboo charcoal and liquorice root, which come together to reduce breakage and restore bounce. The accompanying conditioner supports restoration of hair elasticity and adds moisture without weight to hair, featuring ingredients from Provitamin B5 and hyaluronic acid to rice protein and reishi mushrooms.



# Sculptural styling

Beauty Harmonists champion product ranges which can be proudly displayed in their home as statement pieces in their own right. A new wave of product launches – including hero celebrity ranges – are meeting this demand head on with beautifully-designed, sculptural packaging.

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## Cécred

One of the first celebrity brand's to cater to curls, Beyoncé's Cécred taps into the industrial, pebble-like packaging trends dominating the beauty world; this haptic packaging has been designed to mimic ancient monuments. The textured surfaces speak to the brand's dedication to textured hair, which it has been created to support.



## Blake Brown

Elevated packaging at accessible price points, Blake Lively's Blake Brown launched in Target with recyclable packaging inspired by honeycomb. Wood materials evoke an aromatherapy experience in the range's warm scents. However, customers have reported that the design (particularly the lid) makes the packaging frustrating to use.



## Oribe

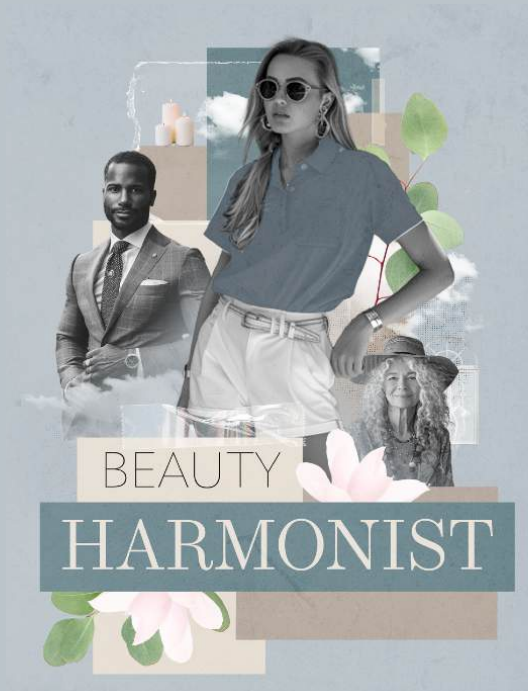
A true mark of elevated packaging is its ability to be used time and time again, designed and crafted with care. These recyclable bottles and accompanying tips can be rinsed, dried and used multiple times. Architectural structures in jewel tones create a sense of heritage alongside a modernised, refined and luxurious feel.



## Fenty Hair

Utilising 100% PCR aluminium and 50% PCR plastic, Rihanna's Fenty Hair packaging reflects the brand's commitment to sustainability. Chic pastel colours - the perfect accompaniment to the piña colada scent of the range - supports understanding of different product categories. Flip lids also make the tubs easy to use in the shower.





Brands should tap into the **Beauty Harmonist** consumer attitude to leverage their desire for aesthetically-pleasing products. Neighbouring attitudes like the Wellness Trailblazer, Tech Voyager, and Track & Trend share values of wellbeing, sustainability, and modern style, unlocking significant marketing potential by appealing to consumers who prioritise beauty and current trends.

*How brands can engage with this consumer attitude:*

**Premium Pricing:** Given their focus on aesthetics and quality, these consumers are often willing to pay a premium for products that meet their high standards for beauty and design.

**Brand Loyalty:** By consistently delivering products that enhance both personal and environmental beauty, brands can foster strong loyalty among these consumers.

**Customer Insights:** Feedback from these detail-oriented consumers can provide valuable insights into product improvements and innovations, driving better product development.

**Market Differentiation:** Brands that successfully cater to this consumer type can differentiate themselves in crowded markets by emphasising design and aesthetic value in their products.

**Influence on Trends:** These consumers are often trendsetters due to their focus on aesthetics and design, making them valuable for brands looking to stay ahead of market trends.

**Enhanced Brand Image:** Associating with consumers who emphasise beauty and harmony can improve a brand's image, positioning it as sophisticated and high-end.

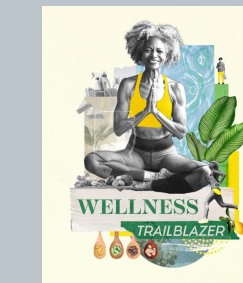
**Cross-Selling Opportunities:** Since Beauty Harmonists seek coherence in their routines and environments, they are more likely to purchase multiple products that contribute to a unified aesthetic, providing brands with opportunities for cross-selling.

**Long-Term Engagement:** By engaging consumers who appreciate aesthetics on a deeper level, brands can create long-term relationships based on shared values and interests.

**Social Media Visibility:** Beauty Harmonists are likely to share their beautifully curated spaces and products on social media, increasing brand visibility and engagement through visually compelling content.

**Word-of-Mouth Promotion:** Beauty Harmonists, who often take pride in their curated environments, are likely to recommend brands that align with their aesthetic values to friends and family, enhancing organic growth.

These attitudes share a focus on aesthetics, harmony, and modernity, making them complementary to the Beauty Harmonist. Brands can leverage this by promoting products that are not only beautiful and stylish but also support wellness and sustainability.



**The Wellness Trailblazer**  
This group prioritises health and tranquility, often valuing natural and aesthetically-pleasing products that promote a holistic approach to wellbeing. The Beauty Harmonist's focus on aesthetics and harmony aligns well with the Wellness Trailblazer's emphasis on products that enhance inner and outer beauty, making it a natural fit for brands to appeal to both groups.



**The Tech Voyager**  
This group is primarily focused on the latest technological advancements and cutting-edge gadgets, which often aligns with the goals of the Beauty Harmonist in achieving the most sleek styling in their routine. Their desire for slick, modern tools which utilise technology to perfect a routine, make the best use of luxury styling products as well as the visual appeal of the tools themselves, appeal's to the Harmonist's goal of overall beautification.

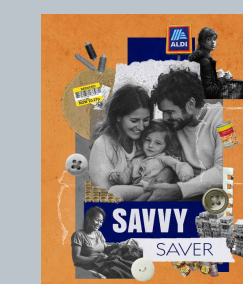


**The Track & Trend**  
Followers of the latest trends and mainstream popularity, this group appreciates stylish and fashionable products. The Beauty Harmonist's focus on aesthetics makes this group highly aligned with the Track & Trend attitude, as both are likely to be drawn to products that are visually appealing and produce Instagrammable results for their channels and their followers. Brands can attract both by emphasising the stylish and contemporary design elements and results of their products.

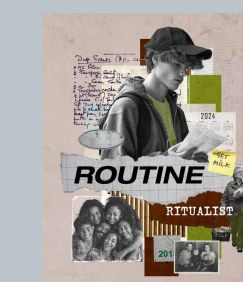
These attitudes prioritise different aspects such as sustainability, cost-efficiency, and practicality, which do not inherently align with the Beauty Harmonist's focus on aesthetics, harmony, and visual appeal.



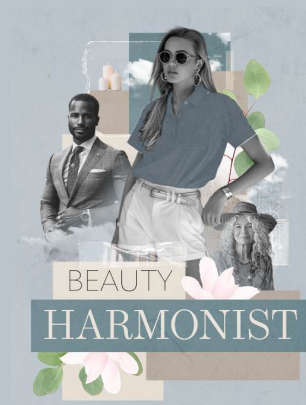
**The Eco Guardian**  
This consumer type is dedicated to sustainability and environmental protection. As the Beauty Harmonist values products that contribute to a beautiful finish, the priority here would be their personal appearance over the future of our planet. The Eco Guardian champions environmentally-friendly ingredients and packaging, whether aesthetically-pleasing to the eye or not.



**The Savvy Saver**  
This consumer type prioritises economical choices and value for money, often focusing on cost-effectiveness over aesthetics. Their primary concern is reducing unnecessary spending, which can conflict with the Beauty Harmonist's willingness to invest in visually pleasing and often premium products.



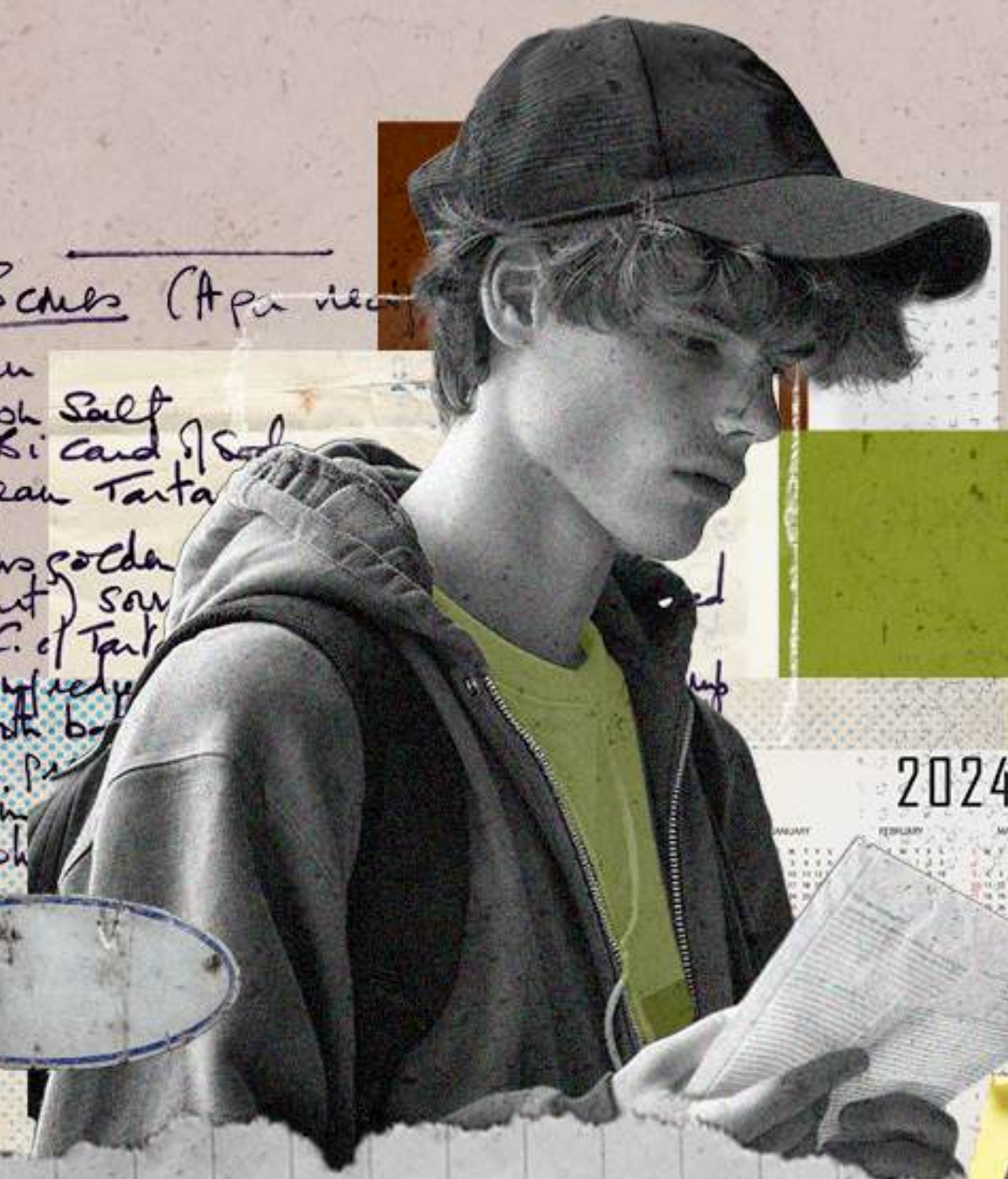
**The Routine Ritualist**  
Preferring consistency and familiarity, this group values stability and practicality over aesthetics. The Routine Ritualist's focus on established habits and reliable products contrasts with the Beauty Harmonist's desire for elevated beauty in their routine, and their willingness to try new products which might add to this routine. Both factors make these two groups less aligned in purchasing motivations.





Drop Scales (Apr 1950)

3 1/2 cups Flour  
1/2 Teaspoon Salt  
1/2 cup Bicarb of Soda  
1/2 cup Clean Tartar  
1/2 an Egg  
2 Teaspoons Soda  
1/2 pt (Scant) sou  
1/2 cup C. of Tart  
Sift Dry ingredi  
mix to smooth b  
beat pan, pa  
batter in m  
turning wh



2024

GET MILK

**ROUTINE**

**RITUALIST**



201



CONSUMER ATTITUDE

# The Routine Ritualist

The Routine Ritualist adheres strictly to their daily routines and habits. This includes purchasing products that align with their accustomed standards, and choices often born of habit and often inherited from their parents.

- Habitual • Consistent • Loyal • Traditional • Predictable • Routine-oriented
- Disciplined • Familiar • Reliable • Heritage-focused



The **Routine Ritualist** is perhaps the most difficult of attitudes to steal share from. The means by which a breakthrough with this group can be achieved is incremental innovation from heritage brands.

Like the Beauty Harmonist, the Routine Ritualist is committed to quality. However their choice of purchase is driven by experience - often over a period of years - where their hero products consistently deliver for them and their routine.

Quality here also speaks to simplicity. Thriving in ease and regularity of their routine, multi-purpose, highly functional products are championed. They will select products which perform the basic, essential functions of cleaning and conditioning, without unnecessary frills or complications.

That being said, a Routine Ritualist can also be found amongst women and men of colour whose genetically-drive routines are by no means simple, but are based in heritage and with the care which is proven to support textured hair.

Their desire for consistency is highly comforting for heritage, household-name brands who have been present on shelves for decades. The Routine Ritualist is committed to purchasing brands their parents use.

These leading brands can retain their committed customers through innovation in product development, safe in the knowledge that additions to ranges or new formulations in hero products will be snapped up by these customers.

You will find Routine Ritualists of all ages, from those who have been dedicated consumers for years, to younger audiences inheriting habits. Even significant life stages will struggle to deter them from their committed habits.

There are more than 167 million videos on TikTok on “hair cycling”.

*TikTok, 2024*

Dandruff affects around half (49%) of the adult population across the globe.

*Grand View Research, 2020*

The global dandruff treatment market is expected to reach a value of 13million by 2029.

*Data Bridge Market Research, 2022*

Hair type determines the style of three quarters of black consumers.

*Mintel, 2023*

As of early 2024, the three most popular haircare brands among US women were Pantene, TRESemmé and Herbal Essences respectively.

*Statista, 2024*

79% of Black women use styling products, and are more likely to invest in moisturising and strengthening treatments.

*Mintel, 2019*



# Influencing trends

## The power of hair cycling

A key addition to the skinification of haircare movement, hair cycling speaks to a routine built around a number of products, each with specific benefits. By rotating these products, it allows consumers to avoid product build-up whilst also tackling a multitude of issues they may face with their hair.

Product ranges which cater to this trend are ideal for the Routine Ritualist who thrives in structured processes which they have nurtured from a young age - particularly for men and women of colour who maintain and boost the health of curls.

This consumer attitude and the hair cycling trend they power will also grow into 2025 and beyond, as consumers recognise the need to support their hair based upon seasonal, environmental demands.

*Clashes with:*  
Eco Guardian

## Know thy curl, love thy curl

In the hair care space, the Routine Ritualist is particularly powerful amongst women and men of colour - those who from a very young age have inherited learned practices to care for and style their hair based upon the demands of their specific curl type.

Until recently, many brands have fallen behind on meeting the demands of curl types from 3A to 4C. As we move into 2025, brands will continue to step up their game in catering to curls more effectively, including major household name brands who are following in the footsteps of start-ups and independent brands who have been leading the way.

With it will also come an ongoing focus on delivering efficient, easy-to-use tools which maximise on a curl maintenance and styling routine.

*Aligns with:*  
Beauty Harmonist

## Destigmatising dandruff

Whilst scalp care is having a major moment, for those who have suffered from dandruff for years, taking care of itchy, flaky and damaged scalps is not new. The Routine Ritualist is an ideal target for this trend; having consistently relied upon specific care regimes, they benefit from developments that boost said regimes.

There is a revolution on the horizon for dandruff care, and it is fuelled by the personalisation possibilities now available. Products which not only support but help you to identify root causes of dandruff will grow at speed.

A rise of consumers sharing their favourite products, tips and tricks on social platforms such as TikTok is also helping to remove stigmas attached to dandruff, accelerating the impact which celebrities such as Claudia Winkleman have helped to kick start, and remain influential in.

*Aligns with:*  
Wellness Trailblazer



# The promise of individuality

*As the haircare industry evolves, more brands are stepping up to meet the personalised needs of diverse groups of consumers, offering tailored solutions that celebrate individuality and inclusivity in every strand.*

49%

Dandruff affects around half (49%) of the adult population across the globe.

167m

There are more than 167 million videos on TikTok on "hair cycling".

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79% of Black women use styling products, more likely to invest in moisturising and strengthening treatments.



## **Freewill**

For those looking to get started in their hair cycling journey, you would be forgiven for confessing not to know how to get started. Customised hair care brand Freewill make this process simple and highly engaging, designed in response to direct consumer feedback which demonstrated the desire for customers to access products which cater to their specific needs and regimes, in a routine which optimises each product's capabilities. A personalised quiz helps customers to determine their optimal range and when to use them, to support both immediate needs (including seasonal and environmental demands) and long term health.



## **Charlotte Mensah**

One of the first widely available, premium haircare lines specifically created for textured, afro and curly hair to gain traction on the hair street, this specialised range was launched by Charlotte Mensah, the multi-award-winning British-Ghanaian hairstylist. Charlotte set the tone for bringing mainstream haircare products to market which cater to the unique needs of maintaining healthy textured hair. With a focus on moisture, nourishment and strengthening, a key ingredient for the range is Manketti Oil, known for its high nutritional value for textured hair. In addition, the range is free from harmful chemicals such as sulphates and parabens.



# The elevation of a classic

*Heritage brands are enhancing their innovation to meet the Routine Ritualist's need for trusted, reliable products, blending familiar traditions with subtle advancements that fit seamlessly into established routines.*

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## **Head & Shoulders BARE**

THE dandruff brand trusted for decades, Head & Shoulders BARE shampoo - available for oily or dry scalp - maintains the products' trusted and dermatologically-tested efficacy with just nine essential ingredients, for its cleanest formulation to date. Tapping into the scalp care trend, BARE combines these minimal ingredients for a gentle, pH-balancing formulation.



## **TRESemmé Lamellar Shine**

TRESemmé, one of the first brands to launch 'professional' D2C products at very accessible price points, introduced Lamellar Shine earlier this year to access the viral glass hair trend. A collection of washing and treatment products, this "unique Lamellar technology...perfectly envelops and aligns hair fibres, smooths the surface of the hair and banishes tangles."



## **Dove Scalp+ Hair Therapy**

This premium range is reportedly capable of acting as a preventative, "gently enhanc[ing] scalp health with high-performance ingredients to provide clinically proven results." Accompanied by an AI-powered Scalp + Hair Therapist, Dove provides customers with personalised advice. The full range includes a scalp serum, root lift spray, foaming scrub plus shampoo and conditioner.



## **L'Oréal Elvive Wonder Water**

Having secured tens of thousands of positive online reviews, beauty editors' praise and consistent social media hype, L'Oréal Elvive's renowned haircare credentials is carried forward in this budget-friendly smoothing product. It's ability to achieve standout results in just eight seconds make it highly appealing to the Routine Ritualist.



# The power of influence

*Household brands are leveraging celebrity and influencer partnerships to connect with customers, using familiar faces to reinforce trust and continuity while subtly introducing new innovations that align with their established habits.*

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There are more than 167 million videos on TikTok on "hair cycling".

79%

79% of Black women use styling products, more likely to invest in moisturising and strengthening treatments.



## **Head & Shoulders x Claudia Winkleman**

Traditionally a subject which has caused embarrassment for many, Claudia Winkleman has injected humour into the brand. Breaking down barriers to dandruff conversations, she has undoubtedly supported the current destigmatisation of the scalp condition, and helped to educate consumers, reinforcing the brand's beauty and medicated credentials.



## **Garnier Nutrisse x Davina McCall**

Having represented the brand for over 17 years, Davina McCall regularly appears in Garnier Nutrisse's advertising, marketing and product packaging, as well as authentic communication of personal use on social channels. Davina has been a central figure in removing the stigma attached to ageing confidently, whilst promoting the potential of at-home hair colour.



## **L'Oreal Elvive x Nadine Baggot**

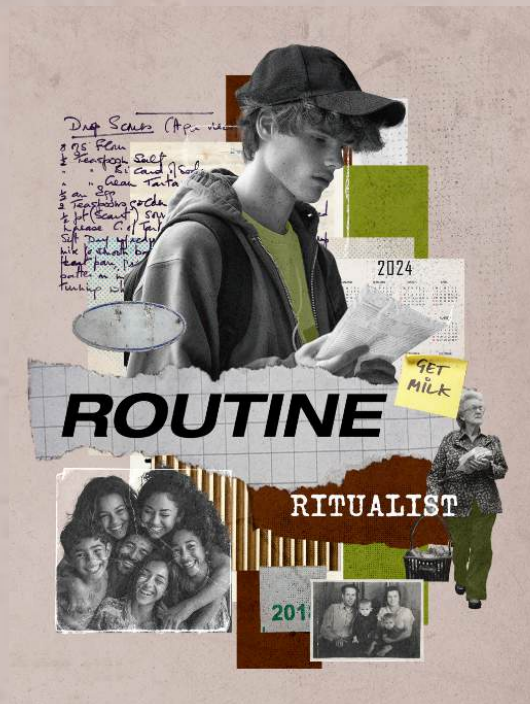
Popular beauty and health journalist, presenter and content creator, Nadine uses 30 years of experience to recommend hero products to her followers. This includes regular promotion of L'Oreal Elvive, as a prominent ambassador for the household name. From Dream Lengths to the viral Wonder Water, her no-nonsense advice communicates the credibility of these products.



## **Pattern x Tracee Ellis Ross**

Following a decade of development, Tracee Ellis Ross' Pattern paved the way for prominent women of colour to launch brands which cater to the specific needs of textured and curly hair, for true inclusivity. As Founder and Creative Visionary, her hands-on role and personal communication supports the brand's mission of empowerment and self-love.





Brands should tap into the **Routine Ritualist** consumer attitude to leverage their preference for consistency and reliability in products. Neighbouring attitudes like the Savvy Saver, Tech Voyager and Wellness Trailblazer share values of practicality, sustainability, and health, unlocking significant marketing potential by appealing to consumers who prioritise dependable, long-term solutions.

*How brands can engage with this consumer attitude:*

**Predictable Sales:** Due to their habitual buying patterns, Routine Ritualists provide a stable and predictable source of sales for products they trust and use regularly.

**High Customer Retention:** These consumers tend to stick with what works for them, which means high retention rates and lower marketing costs for customer re-acquisition.

**Brand Loyalty:** Once a Routine Ritualist adopts a brand into their daily rituals, they are likely to remain loyal, providing long-term revenue stability.

**Advocacy and Word-of-Mouth:** If satisfied, a Routine Ritualist may recommend trusted brands to friends and family, extending influence based on deep-rooted trust and satisfaction.

**Less Price Sensitivity:** Their focus on routine and consistency over experimentation makes them less price-sensitive, allowing brands to maintain stable pricing.

**Feedback for Improvement:** Their consistent use of products makes them good sources of detailed feedback, which can help brands refine and improve product offerings.

**Opportunity for Subscription Services:** Brands can benefit from offering subscription services that ensure Routine Ritualists never run out of the products they depend on, enhancing convenience and increasing customer stickiness.

**Reduced Marketing Costs:** Since these consumers prefer familiar products, brands can spend less on aggressive marketing tactics and instead focus on maintaining quality and trust.

**Cross-Selling Stability:** Brands that successfully integrate into a Routine Ritualist's life can cross-sell related products that align with existing habits, creating more comprehensive customer engagement.

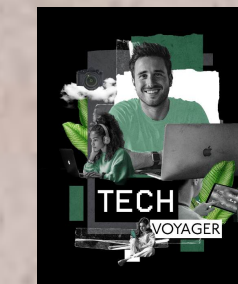
**Strengthened Brand Positioning:** By catering to consumers who value tradition and reliability, brands can strengthen their market position as dependable and trustworthy providers.

These attitudes share a focus on practicality, reliability, and long-term value, making them complementary to the Routine Ritualist. Brands can leverage this by promoting products that are dependable, sustainable, and supportive of a consistent, healthy lifestyle.



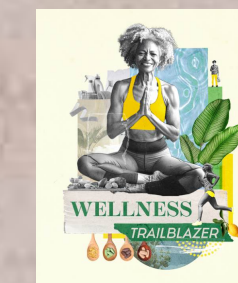
**The Savvy Saver:**

Both the Routine Ritualist and Savvy Saver value reliability and practicality. The Savvy Saver's focus on cost-effectiveness and value for money aligns well with the Routine Ritualist's preference for familiar, trusted products. Brands can appeal to both by emphasising product reliability, durability, and affordability.



**The Tech Voyager**

This group is driven by a desire for the latest and most advanced technology, which - in the haircare sector - helps to bring innovation which revolutionises a routine, supporting greater maintenance of healthy hair, greater styling capabilities, longer-lasting hold, and enhanced speed. This is perfectly suited to the Routine Ritualist who seeks to maintain and elevate their proven-to-be-effective regimes.



**The Wellness Trailblazer**

This group prioritises health and wellbeing, often valuing products that contribute to a balanced lifestyle. The Routine Ritualist's focus on established routines can overlap with the Wellness Trailblazer's interest in maintaining consistent, health-oriented habits. Brands can appeal to both by offering health-focused products that fit seamlessly into daily routines.

These attitudes prioritise aspects like innovation, trendiness, and aesthetics, which do not inherently align with the Routine Ritualist's focus on consistency, reliability, and practicality.



**The Eco Guardian**

In haircare, a Routine Ritualist often seeks to maintain their regime through a series of products which achieves their desired results. This can clash with the Eco Guardian whose primary focus is commitment to environmentally-friendly and long-lasting products, and an overall dedication to under-consumption. However, certain Routine Ritualists may align with this ethos if their focus is simplicity in a routine.



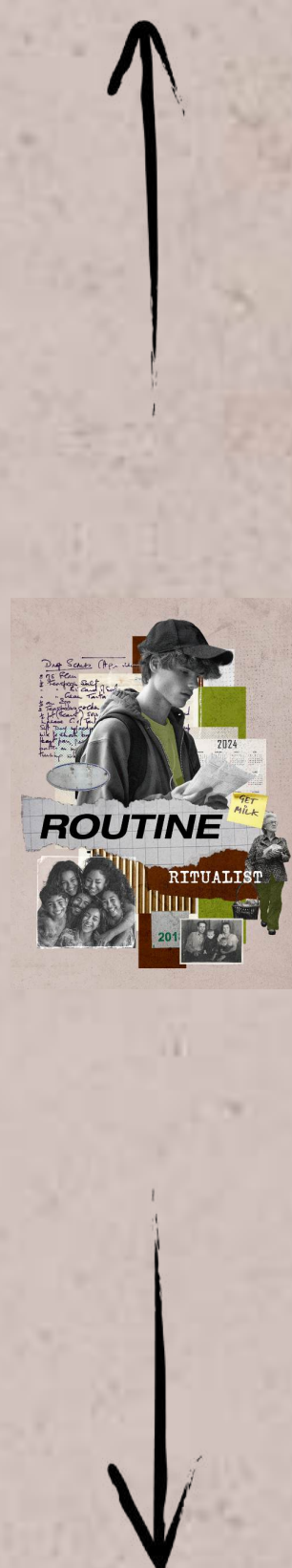
**The Track & Trend**

Followers of this attitude are primarily motivated by the latest trends and mainstream popularity. Their tendency to switch products frequently to stay current contrasts with the Routine Ritualist's preference for stability and long-term use of trusted products. The dynamic nature of Track & Trend consumers is at odds with the Routine Ritualist's consistent purchasing habits.



**The Beauty Harmonist**

While this group values aesthetics and harmonious design, their focus on style and visual appeal may not align with the Routine Ritualist's emphasis on practicality and reliability. The Beauty Harmonist's willingness to explore new and beautifully designed products contrasts with the Routine Ritualist's tendency to stick with familiar and functional items.







CONSUMER ATTITUDE

# The Track & Trend

This pursuer of the popular diligently tracks and follows the latest trends in both household-name and independent, emerging products, believing that conformity to products which are in-demand is the best course of action.

Trend-following · Fashionable · Conformist · Influenced · Up-to-date  
· Mainstream · Popular · Socially-aware · Brand-conscious · Contemporary



This group is highly influenced by friendship groups, social media and the news agenda. They rely less on intense research, more on superficial perceived benefits. Of all consumers, they are the least committed to brands, regularly trying new products they encounter, at the risk of experiencing FOMO.

The Track & Trend's ability to adapt has been fuelled by the global pandemic, which forced them to change their spending habits, where they shopped, as well as the products they were choosing based on what they encountered via news and social media. Haircare is a leading example, as the rise of self-care during this time was significant.

As well as products which are capturing attention on social platforms, they are also avid followers of techniques, tips and tricks which haircare's hottest influencers are touting.

This commitment to micro-trends sees them purchasing more regularly - and yet sporadically - than their consumer counterparts, experimenting with various products in the styling, colouring as well as treatments in the haircare space.

The Track & Trend's desire to display their habits to the world ensures that brands can source first person and often in-depth reviews and feedback in real time.

The Track & Trends naturally lean into generations who have been exposed to social media from a young age, however you will also find older generations who utilise online marketplaces and seek digital communities for support and inspiration in nurturing their routine.

Across the globe, 90% of Gen Zers are interested in using augmented reality to try out new styles, including hair colour. This is the same for 87% of millennials, and 84% of Gen X.  
*Statista, 2022*

“Scalp facial” videos have been viewed more than 33 million times on TikTok.  
*TikTok*

A reported 53% of women are influenced by social media in their purchasing habits, after seeing influencer posts.  
*Learn Hub | G2, 2024*

The celebrity haircare category is accelerating in its growth, with sales of more than \$80 million in one year (between April 2023 and April 2024). Whilst this remains lower than other categories such as fragrance, “analysts say it’s the category with the most growth potential”.  
*NielsenIQ, 2024*

“Celebrity beauty buyers tend to be among the most engaged beauty consumers, spending about 25% more annually than the average beauty consumer.”  
*Anna Mayo, VP of Beauty Thought Leadership, NielsenIQ, 2024*



# Influencing trends

## Digitalised routines

The hyper personalisation of haircare is being fuelled by apps and services which not only help customers to understand the individual demands of their hair, it helps them to find products which supports its health.

The addition of AI ensures these recommendations for routines are adaptable depending upon internal and external factors. This includes recommendations based upon individual consumer feedback, as well as matters such as seasonal demands.

AR allow users to test out new styles and new colours, before they make a dreaded (often viral) mistake of too drastic a change.

Brands which offer subscription-based services make this level of personalisation possible. They can also tap into the dramatic growth in popularity of experiential retail and luxury salon experiences.

*Aligns with:*  
Tech Voyager

## Reflecting on glass hair

The viral 'skin flooding' and glass skin trend has reached haircare, fuelled by the dedication to improving the health of our hair and our scalp. High shine, high moisture hair is achieved through the use of products at every stage of our hair care routines, from the products applied during washing, to leave-in and overnight products and styling.

Key ingredients bolster the capabilities of products to achieve this look, including panthenol, also known as provitamin B5. Its ease of absorption supports moisture retention in the scalp, supporting the reduction of water loss and the maintenance of the skin barrier to reduce irritation.

The glass hair trend also supports the acceleration of products dedicated to fighting 'humidity hair', with Chris Appleton's Color Wow dominating TikTok.

*Clashes with:*  
Routine Ritualist

## The power of influence

The ability to 'connect' with your favourite influencers and celebrities is opening many doors for those seeking to launch their own haircare ranges.

From Rihanna and Beyoncé, to Chris Appleton and Brad Mondo, we're seeing their star power have huge influence on purchasing habits. Not only that, but trust in what their products and brands promise.

The important factor in building this trust is tapping into the authenticity and honesty which consumers today are outspoken in demanding. When Beyoncé launched Cécred, she silenced critics when she shared videos of her using her own products on her natural hair.

*Aligns with:*  
Beauty Harmonist



# From brat slick back, to polished glass

Whether it is covering frizzy, difficult-to-tame hair or showing off ultra smooth, ultra healthy, ultra strong hair, the flawless mirror-like hair of this trend is dominating social media.

90%

90% of Gen Zers are interested in using AR to try out new styles, including hair colour.

53%

53% of women are influenced in their purchasing habits after seeing influencer posts.

25%

Celebrity beauty buyers spend about 25% more annually than the average beauty consumer.



## Fino

Affordable and highly effective, Shiseido's Fino Premium Touch Hair Mask has not only gained viral popularity because of its contribution to the glass hair trend, it also supports healthier, stronger hair. Ingredients including royal jelly extract, Lipidure EX and PCA help to heal from within, and lock in moisture. Transformative glass-like texture is achieved virtually instantly.



## Ouai

Ouai's Hair Gloss works to smooth, hydrate and enhance shine. Hyaluronic acid and rice water help to hydrate and nourish to create the liquid hair look, whilst sugar beets and panthenol protect colour and prevent damage. This damage control helps to minimise flyaways, adding to the sleek appearance of hair.



## Samnyte

The ultimate secret weapon for the clean girl and the brat girl alike, this wax stick can cover all manner of frizz and flyaways to produce a smooth, sleek look. Ease of application alongside a flexible and lightweight hold with minimal residue contribute to this product's viral popularity, as well as its use for all hair types and textures.



## Dae

Powerful ingredients make sure this product provides the standout glass shine this trend demands. Alongside silicone-free shine enhancers, this product is packed with natural ingredients including moringa leaf extract, prickly pear seed oil and beet sugar extract for moisture, nourishment, damage control, and shine without grease.



## Viral styling

*As the saying goes, a worker is only as good as his tools. Enter products which ensure you're working with the best product formulations for your hair type.*



### **Bread Beauty Supply**

Few brands combine such a dreamy collection of appealing traits for the discerning Gen Z customer as Bread Beauty Supply. Highly Instagrammable packaging houses natural, clean formulations which cater to the rich and diverse textured and curly hair space. It's multi-functional, minimal fuss range make complex hair routines feel simple without sacrificing on quality and efficacy. This includes easy-to-follow language used for each of the products, taking away the stress that is often accompanied by discovering and selecting the best products for your individual routine.



90% of Gen Zers are interested in using AR to try out new styles, including hair colour.



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Celebrity beauty buyers spend about 25% more annually than the average beauty consumer.



### **Dyson Chitosan**

Maximising on their god-tier haircare status, Dyson has just launched its first styling products to accompany its pioneering technology. Featuring a pre-style cream (of which there are four variations tailored by hair type) and post-style serum, the range is centred around a hero ingredient - Chitosan - a molecule derived from oyster mushrooms, which gives them structure. In the pre-style cream, it supports a flexible hold when styling. In the serum, it encourages hold whilst moisturising. Smart packaging means the perfect amount is dispensed every time. It is also NFC-enabled so you can scan the lid to order refills, and get styling tips too.



# The power of demand

*Viral haircare heroes are taking influencers, celebrities and fans by storm. Whether it's game-changing formulas, Instagram-worthy packaging or viral results that are the before & after of dreams, we round-up the must-haves of haircare.*



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Celebrity beauty buyers spend about 25% more annually than the average beauty consumer.



## **Amika Perk Up Dry Shampoo**

This next gen dry shampoo has taken social media by storm thanks to its flexibility by hair type, its clean, lightweight formula, and its ability to effectively absorb oil, sweat and dirt from the scalp with no white residue. Cruelty-free and delivered in recyclable packaging, Perk Up is talc-free and non-toxic, and all with a pleasant signature fragrance.



## **ColorWow Dream Coat**

Social content demonstrating the power of this product, alongside the buy-in of major celebrities courtesy of ColorWow and star hairstylist founder Chris Appleton, have supported the meteoric rise of Dream Coat Supernatural Spray. The lightweight formula's ability to last after three to four washes adds to its viral popularity.



## **Gisou Honey-Infused Hair Oil**

Mirsalehi honey, taken from founder Begin Mirsalehi's family bee garden, forms the basis of this trending product. Highly versatile, this hair oil can be used as a pre-styling treatment, overnight mask, as a finishing oil, and more. Instagrammable packaging and viral before-and-after social content has also fuelled demand for Gisou.



## **Augustinus Bader The Rich Shampoo**

This luxury brand has translated its proprietary, highly efficacious TFC8 (Trigger Factor Complex) cell renewal technology to its haircare, fuelling the popularity of its new solutions. Not only does it cleanse, it also supports long term health. After appearing on season four of *Emily in Paris*, we expect its popularity to continue.





Brands should tap into the **Track & Trend** consumer attitude to leverage their desire to feature the hottest products for their friends, family and followers. In their pursuit for trending brands, they align with the Beauty Harmonist, Tech Voyager and the Wellness Trailblazer, who seek innovation of the moment.

*How brands can engage with this consumer attitude:*

**Rapid Adoption:**

These consumers are quick to adopt the latest products, helping brands gain quick market traction with new launches.

**Influence on Market Trends:**

Because they follow popular trends, these consumers can help propel a brand into prominence by increasing visibility and desirability.

**Social Media Amplification:**

Trend-following consumers are likely to share their purchases and experiences on social media, providing brands with free publicity and peer-to-peer endorsement.

**Increased Sales Volumes:**

By tapping into the desires of consumers who seek the latest and most popular products, brands can see a boost in sales volume during peak trend periods.

**Market Research Insights:**

Tracking the preferences and feedback of trend-sensitive consumers can provide valuable insights into evolving consumer tastes and market trends.

**Brand Rejuvenation:**

Engaging with fashionable consumers can refresh a brand's image, making it appear more modern and relevant to a broader audience.

**Strategic Partnerships:**

Brands can leverage collaborations with influencers and other trendsetters that this consumer group admires, enhancing credibility and reach.

**Premium Pricing Opportunities:**

During the height of their popularity, products can often command premium pricing, benefiting from increased perceived value.

**Competitive Advantage**

Staying relevant with trend followers can give brands a competitive edge, particularly in industries where being seen as current is crucial.

**Customer Base Expansion**

By appealing to trend followers, brands can attract a wider audience, including younger consumers eager to engage with the latest products and services.

These attitudes share a focus on staying current with trends, whether in technology, aesthetics, or wellness, making them complementary to the Track & Trend consumer. Brands can leverage this by promoting products that are stylish, innovative, and aligned with the latest trends



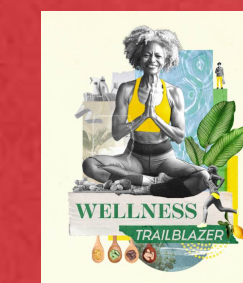
**The Tech Voyager**

Both the Track & Trend and Tech Voyager consumers are driven by a desire to stay current with the latest developments. The Tech Voyager focuses on cutting-edge technology, which often becomes trendy. Brands can appeal to both groups by highlighting innovation and the latest features.



**The Beauty Harmonist**

This group values aesthetics and current styles, similar to the Track & Trend consumer. They appreciate products that are trendy, can produce an instagrammable final look, and are beautifully designed. Brands can attract both groups by emphasising fashionable and visually-appealing products. Both archetypes lean into the over-consumption and innovative, viral nature of many haircare brands.



**The Wellness Trailblazer**

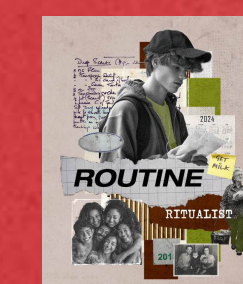
While primarily focused on health and wellbeing, this group also keeps up with the latest wellness trends. Brands offering trend-led wellbeing products for both mental and physical health, can appeal to both Wellness Trailblazer consumers and Track & Trend followers by highlighting modern, popular health innovations for hair.

These attitudes prioritise different aspects of consumer behaviour—cost-efficiency, consistency, and sustainability—which are not inherently aligned with the Track & Trend's focus on staying current with popular trends and new products.



**The Savvy Saver**

This group focuses on economical choices and value for money, often avoiding trendy or new products that can come with a higher price tag. Their primary concern is cost-effectiveness, which contrasts with the Track & Trend's emphasis on following the latest popular products.



**The Routine Ritualist**

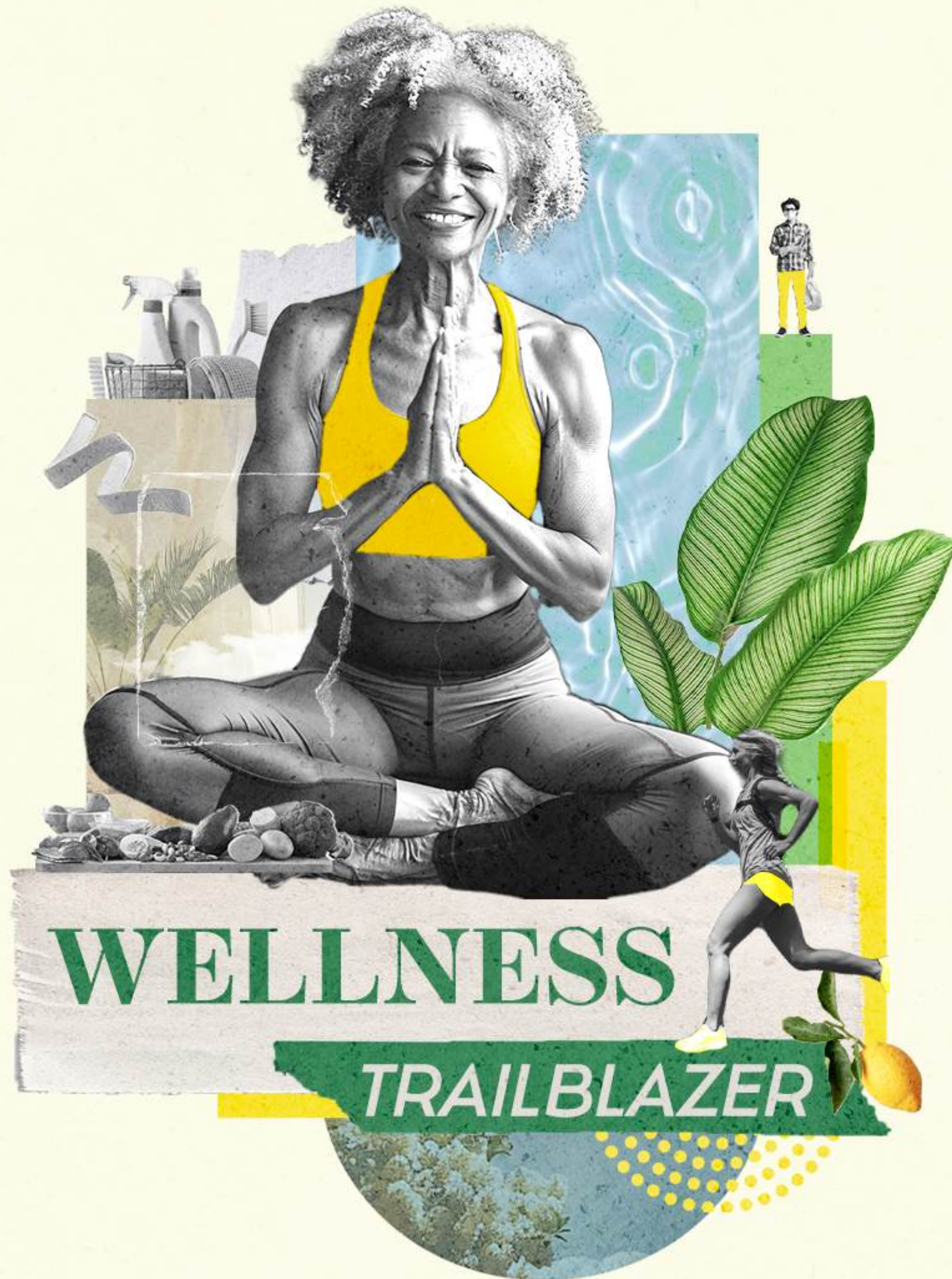
Preferring consistency and familiarity, the Routine Ritualist sticks with trusted and established products, showing little interest in constantly updating to the latest trends. Their focus on stability and routine makes them less aligned with the dynamic and ever-changing nature of the Track & Trend consumer.



**The Eco Guardian**

While they may occasionally intersect with trends in eco-friendly products, the Eco Guardian's primary focus is on sustainability and environmental impact rather than following the latest mainstream trends. Their commitment to long-term environmental benefits often takes precedence over adopting popular or trendy products.





CONSUMER ATTITUDE

# The Wellness Trailblazer

The pinnacle of wellness in their lifestyle, prioritising health and tranquility in every aspect. This includes products they choose for their own and their loved one's personal routines, promoting wellbeing alongside their primary functions.

Health-conscious • Tranquil • Holistic • Mindful • Wellbeing-focused  
• Harmonious • Nurturing • Serene • Organic • Balanced



The **Wellness Trailblazer** seeks holistic, sustainable and overall science-based haircare that provides comfort in the knowledge that it is safe for them and their loved ones. The products the Wellness Trailblazer chooses for their personal care routine play a significant role in both their physical and mental wellbeing.

For the Wellness Trailblazer, their haircare routine is a key opportunity for them to indulge in their desire for self-care. The quality of the products they choose must be on par with the experience they can offer, providing a spa-like moment in their day from the comfort of their own bathrooms and bedrooms.

Believing in the connection between physical health and mental wellbeing, they are drawn to products that enhance this connection. Aromatherapy-infused products or those that provide a spa-like experience at home are particularly appealing.

This consumer attitude are the key drivers of haircare products that are formulated with natural, non-toxic ingredients. They are vigilant about avoiding harmful chemicals and prefer products that are free from sulfates, parabens, and synthetic fragrances. They also select haircare products that are safe and beneficial for the entire family, often choosing hypoallergenic or gentle formulations suitable for all ages.

For the same reason, the Wellness Trailblazer is also a champion of the microbiome skincare movement, including scalp wellness in the haircare sector.

They also recognise that their choice of products and the brands producing them has a direct impact on the health of our planet, and therefore their own personal wellness in the impending threats global warming will have on our health.

Almost a quarter (23%) of women in the US who purchase haircare products, said they began buying dedicated scalp products within the last three years.

*GCI Magazine, 2023*

Consumers are more aware than ever before of the sensitivities of the scalp to harsh ingredients; 39% of customers reportedly check labels to ensure a product is free from harsh chemicals.

*GCI Magazine, 2023*

The hair growth supplements market is expected to grow at a CAGR of 9%, to reach a valuation of \$2.7 billion by 2029, up from \$1.7 billion in 2024.

*Research and Markets, 2024*

“Scalp and hair therapy is the second-highest volume category within hair care products, with 3.2 million average monthly searches. This reveals some top consumer concerns like dryness, thinning and hair loss. The top growing hair concerns year-over-year are postpartum hair loss, anti-frizz, hair loss stress, and oily hair.”

*Spate, 2022*

As of 2022, 82% of Americans said that protecting their skin from sun and ultraviolet exposure was of greater importance to them than five years before.

*American Academy of Dermatology, 2022*



# Influencing trends

## A holistic approach to hair

The ingestible supplements market for hair growth is expected to experience steady growth in the coming years, fuelled by a growing demand for customers seeking natural alternatives to chemical ingredients, which do not compromise on efficacy. This is attributed to heightened consciousness surrounding the health of our hair, particularly awareness of the impacts of climate change.

Customers are also becoming increasingly knowledgeable on how much they need to be ingesting of key ingredients in order to see their effects. Innovative brand marketing is no longer enough for customers such as the Wellness Trailblazer.

From growth, density and bond building to moisture and shine, this educated consumer group seeks the power of products and ingredients which offer multi-functional benefits.

*Aligns with:*  
Eco Guardian

## From scalp to strand: Bond building

Scalp care has dominated the hair care space of late, however it is set to take a back seat to a renewed focus on the health of our hair strands. It is fuelled by customers who are seeing the effects of their scalp care stall, as they are not addressing the health of their bonds.

This key trend of molecular treatment for the hair supports customers seeking to repair and offset damage, rebuilding the strength of their hair and giving weighting to the popularity of skinification of haircare. However brands should offer products or ranges which support both scalp and strand, as the microbiome of our scalp is intrinsically linked with the cellular health of the hair.

Brands which also offer accompanying products such as microneedling derma rollers will see brand loyalty grow, as customers build their whole routine around their brand.

*Aligns with:*  
Beauty Harmonist

## SPF (Scalp Protection Factor)

Research has shown that excessive sun exposure is one of the most frequent causes of structural damage to our hair; UVA for colour change, and UVB for hair protein loss.

It is little wonder that with SPF making waves in skincare, this growth is fuelling new products which cater specifically to hair and the scalp. 'Hair sunscreen' saw a year-on-year growth of 13.2% in online searches in 2024.

From protectants and UV absorbers, to hair perfume with protective benefits, this space is thriving, speaking to the ongoing demand for multi-functional and hybrid products.

The brands which will excel in this space are those which provide lightweight formulas, cater to different hair colours and skin tones for the scalp, as well as including broader ingredients to bring properties such as hydration.

*Clashes with:*  
Savvy Saver



# Scalp care and the skinification of hair

*Clean beauty is nothing if we don't take it right the way to the root – or more accurately, the scalp. Brands are appealing to consumers by promoting both inner tranquility and external health, seamlessly integrating wellness into their daily self-care rituals.*

82%

82% of Americans said protecting their skin from sun exposure was of greater importance than five years before.

39%

39% of customers reportedly check labels to ensure a product is free from harsh chemicals.

2.7bn

The hair growth supplements market is expected to grow at a CAGR of 9%, to reach a valuation of \$2.7 billion by 2029.



## **Act + Acre**

The Wellness Trailblazer trusts the innovative technology and a scalp-first approach of science-driven Act + Acre. Cold pressed technology uses cold air and pressure to bring together ingredients, instead of using heat. This ensures that the potency and efficacy of the oils, vitamins and nutrients remains strong, rather than being degraded which can occur during traditional heat processing. A major player in the clean beauty and haircare movement, the range is free from parabens, sulphates, silicones and synthetic fragrances. Instead Act + Acre uses high-quality, clean and non-toxic ingredients like baobab oil, moringa oil, and vitamin-rich botanical extracts.



## **CENTRED**

This wellness-focused haircare brand was founded by Laura and Kieran Tudor, the launch of which was fuelled by Laura's personal experience of severe hair loss. Seeking to "redefine hair wellness", this breakthrough brand "marries internal vitality with external beauty" as part of their unique Inside Out Method™. Combining scalp care, supplements and wellness practices, CENTRED has become known for its high performance formulas that are recognised and respected by professionals, nutritionists and trichologists. The brand is also committed to sustainability, both in its formulations and recyclability through their impact partner Repurpose Global.



# The balanced benefits of holistic haircare

*These practices capture the attention of Wellness Trailblazers through products that harmonise health and tranquility, integrating natural ingredients and mindful rituals into daily routines to promote overall well-being alongside hair care.*

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## Scandinavian Biolabs

This specialised scalp care brand is dedicated to supporting an overall, holistic lifestyle, promoting self care through your hair and scalp routine. Their range of products are designed not for a quick fix, but as part of a long-term, consistent wellness regime that both promotes growth and prevents thinning. This is also made possible through the use of clean, non-toxic formulations, including active plant-based ingredients, such as niacinamide and castor oil, as well as the brand's proprietary Bio-Pilixin® formula. This compound is scientifically-proven to improve scalp health and promote hair growth by stimulating the follicles.



## Happy Hair People

This joyous brand integrates a message of emotional and mental wellness, which it actively fosters in building a community with its customers. It provides educational content about holistic hair practices and self-care tips which go beyond haircare. This sense of community is promoted further in the brand's dedication to inclusivity and diversity. Customers can create a truly personalised routine based around differing hair types, textures and demands. The addition of scientifically-proven fragrant technology, MoodScentz™ has been shown to “enhance happiness and create a positive state of mind”.



# Heroic haircare ingredients

*Highlighting the purity and potency of nature, focused formulations meet the growing demand for clean beauty in haircare.*



## **FEKKAI Apple Cider Vinegar Detox**

The ultimate tool for a hair detox, FEKKAI's apple cider vinegar scalp scrub promises to remove 95% of visible build up with only one use. Tested in Frederic Fekkai's legendary salons, not only does the product provide an instant and effective cleanse, it supports the overall balance of a healthy scalp. It restores a robust protective barrier to help prevent further buildup in the future, and nurturing production of natural oils. The hero ingredient of apple cider vinegar plays a key role in this process, thanks to its natural ability to fight bacteria, restore pH levels, and reduce irritation as well as dandruff.

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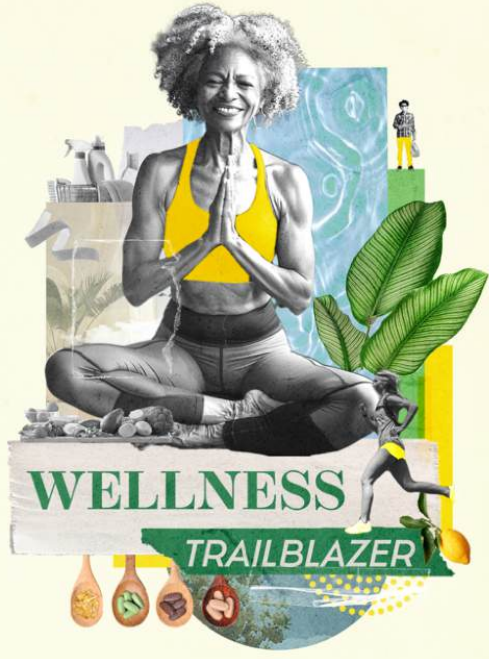
The hair growth supplements market is expected to grow at a CAGR of 9%, to reach a valuation of \$2.7 billion by 2029.



## **The Body Shop Ginger**

A cult favourite for this beloved brand, The Body Shop's ginger haircare range taps into the soothing and anti-inflammatory properties of ginger root. This is combined with fellow ingredients birch bark and white willow extracts which help to purify the scalp. These ingredients come together to create a formulation which targets dry, flaky scalps, making it a popular choice for those struggling with dandruff. The hero ingredients also bring a refreshing, revitalising scent, whilst maintaining the brand's commitment to cruelty-free and ethically sourced ingredients in a highly eco-conscious product.





Brands should tap into the Wellness Trailblazer consumer attitude to meet the rising demand for holistic health products. Aligning with neighbouring attitudes like the Eco Guardian, Beauty Harmonist, and Tech Voyager, which value sustainability, aesthetics, and innovation, unlocks significant marketing potential and attracts wellness-focused consumers.

*How brands can engage with this consumer attitude:*

**Premium Pricing:**

These consumers often value quality over cost and are willing to pay more for products that align with their wellness goals.

**Brand Loyalty:**

Due to their focus on holistic health, once these consumers find a brand that meets their wellness criteria, they are likely to remain loyal.

**Market Influence:**

As trendsetters in the wellness space, their preferences can shape industry standards and influence the broader market.

**Cross-Selling Opportunities:**

Since their interest in wellness extends to all aspects of life, there are opportunities for brands to cross-sell across different product categories, from haircare to bodycare and beyond.

**Positive Brand Association:**

By aligning with wellness values, brands can enhance their reputation and be viewed as advocates for health and wellbeing.

**Building Communities:**

Brands which create a platform for these consumers to connect with one another - and the brand itself - have an opportunity to build an authentic, long-lasting connection with them.

**Purposeful Collaborations:**

Where your brand may not deliver on every aspect or another sector provides access to a group of potential consumers, collaborations with like-minded brands and/or influencers opens doors.

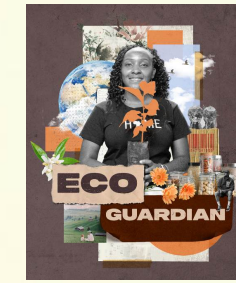
**User-generated Content:**

As an impassioned group of consumers keen to share their voice, the potential for UGC is high amongst the Wellness Trailblazers, helping to build a bank of authentic content for your brand.

**Customer Service Credentials:**

Building further on the importance of authenticity, brands which have a robust customer service system have the opportunity to build a very positive reputation with existing and potential customers.

These attitudes all emphasise inner and outer wellbeing, whether through innovative technology, beauty through design, or through kindness to the planet, making them aligned with the Wellness Trailblazer.



**Eco Guardian**

Both the Wellness Trailblazer and Eco Guardian prioritise health and wellbeing, with a strong emphasis on sustainability and environmental impact. Products that are eco-friendly and promote overall wellness will appeal to both groups, as they value holistic health and sustainable living.



**The Beauty Harmonist**

As a group that values beauty and harmony in their routines, seeking beauty and wellness both inside and out, the Beauty Harmonists are natural allies of the Wellness Trailblazer. Brands that emphasise the long-term benefits in the health of the hair to ultimately enhance appearance and growth, can capture the attention of both the Wellness Trailblazer and Beauty Harmonist.



**The Tech Voyager**

While primarily focused on the latest technology, the Tech Voyager is interested in innovations that enhance their personal health, including the health of their hair. Cutting-edge technologies which protect hair from heat, as well as promoting growth alongside long-term health and strength, can attract both Wellness Trailblazer consumers and Tech Voyagers by combining innovation with wellbeing.

These attitudes prioritise different aspects of consumer behaviour—cost-efficiency, trendiness, and routine—which do not inherently align with the Wellness Trailblazer’s focus on holistic health, wellbeing, and balance.



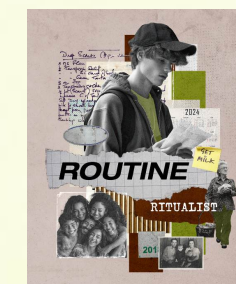
**The Savvy Saver**

This group prioritises economical choices and value for money, often focusing on cost-effectiveness over health and wellness benefits. Their primary concern is reducing spending, which may not align with the Wellness Trailblazer’s focus on premium, health-oriented products.



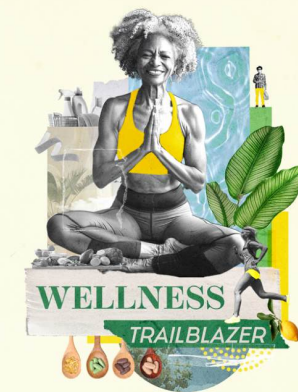
**The Track & Trend**

This group follows the latest trends and mainstream popularity, which may not always prioritise health and wellbeing. Their focus on staying current with popular products can sometimes lead to choices that are fashionable but not necessarily aligned with the holistic wellness values of the Wellness Trailblazer.



**The Routine Ritualist**

Preferring consistency and familiarity, the Routine Ritualist values stability and established habits. Their reluctance to adopt new health and wellness products - unless they fit seamlessly into their routines - contrasts with the Wellness Trailblazer’s openness to innovative and holistic wellness solutions.







CONSUMER ATTITUDE

# The Tech Voyager

On a consistent and committed journey through the realm of technology, the Tech Voyager explores advancements and innovations with dedication and enthusiasm in their everyday life.

Enthusiastic · Dedicated · Tech-savvy · Innovative · Committed · Explorer · Progressive · Inquisitive · Engaged · Forward-thinking



The **Tech Voyager** approaches haircare with the same curiosity and enthusiasm they apply to other aspects of their tech-driven life. They seek products that offer innovative, high-performance solutions and are eager to explore how technology can enhance their haircare routine.

The consumer attitude of early adopters, this group has the financial capabilities and desire to invest in new and potentially game-changing products - even if it means being among the first to try them. This willingness to experiment with emerging technologies sets them apart from more traditional consumers.

They appreciate products that can be tailored to their specific needs; haircare systems that offer customisable settings or formulations based on hair type, weather, or lifestyle.

They seek to simplify their lives, utilising AI to learn their habits and predict their needs, and valuing products that can integrate with their existing tech ecosystem. For instance, a hairdryer that can be controlled via a smartphone app or a smart mirror that provides feedback on hair health.

Committed to research and efficacy, the Tech Enthusiast will devour online reviews, understanding the technical aspects of ingredients and formulations, as well as contribution to sustainability which also drives their purchasing decisions.

Their purchasing power is influential through their larger disposable incomes. They therefore include those from older generations with greater spending power, as well as younger, affluent individuals, couples and young families.

The size of the global hair styling tools market will see it grow from an estimated \$11.5 billion in 2024, to \$14.3 billion in 2029.  
*Mordor Intelligence, 2024*

More than a third (39%) of hair professionals in salons, barbers and clinics “believe that AI can significantly enhance salon efficiency.”  
*NHBF, 2024*

The AI beauty and cosmetics market - which includes haircare - is expected to reach almost \$4 billion in 2024, with a CAGR of 21.5% from 2023. It is projected to reach a staggering \$8.1 billion by 2028.  
*Business Research Company, 2024*

An AI-based analysis tool, Myavana, shares that over 76% of users have purchased based on recommendations, with 90% achieving successful results.  
*Myavana, 2023*

As of September 2024, there are more than 475 million posts on TikTok related to the Dyson Air Wrap.  
*TikTok*



# Influencing trends

## Multi-tasking tech for your mane

At home technology is fuelling consumers' desire to road test styles they would typically only achieve with a stylist in a salon.

This is achieved through tools which support ease of styling, but importantly, which also protect the hair.

Having once been a source of nostalgic teasing, wet-to-dry straighteners are back and more advanced than ever before, with some brands promising zero heat damage - fear the sizzle no more. For afro hair, there are a new wave of tools which nourish while they detangle and style.

As is the desire of the Tech Voyager, we are also seeing consumers vying for technology which simply saves them time. Minimising drying time - especially for those with curly hair - is the holy grail.

*Aligns with:*  
Routine Ritualist

## A revolution in hair growth: LED Therapy

Advancements in technology are accelerating major trends of scalp care and hair repair, as well as supporting those seeking to tackle the effects of hair loss.

Capable of stimulating hair follicles to promote growth and overcome even genetic hair loss, the rise and rise again of these tools sees them become more affordable, and more adaptable to our daily lives.

New iterations of this technology combines their effects with the scalp care tools currently also taking off, and are further supported through innovative new products and formulations which also contribute to scalp stimulation and hair growth.

As we move towards 2025 it is expected that more household name brands will add this technology to their haircare rosters.

*Clashes with:*  
Savvy Saver

## The at-home AI salon

The use of AI in haircare allows consumers and brands to build a more personalised relationship than ever before. Through consistent analysis of a customer's hair, brands can adapt product choices, suggest specific ingredients, and cater to environmental demands.

This kind of adaptive technology is also popular for at home styling and the art of perfecting curls, with advanced tools doing the hard work for customers who struggle to achieve a certain look themselves.

As this technology continues to develop, AI applications will be able to predict what may be ahead for a customer's hair and scalp health, providing recommendations and treatments to support the prevention of potentially harmful factors. This type of engagement allows brands to build long-term, trusted relationships with consumers, making a full range of products available to them.

*Aligns with:*  
Beauty Harmonist



# The future of h[AI]r

*Advanced hair tools and AI-powered analysis are offering cutting-edge innovations that transform haircare into a data-driven, customised experience, aligning with consumers' passion for the application of cutting-edge tech in their everyday routines.*

475m

As of September 2024, there are more than 475m posts on TikTok related to the Dyson Air Wrap.

14bn

The global hair styling tools market will grow from \$11.5 billion in 2024 to \$14.3 billion in 2029.

39%

39% of hair professionals "believe that AI can significantly enhance salon efficiency."



## **Dyson Airwrap ID**

The 'MyDyson' app wirelessly connects to Dyson's latest development in its hair tool technology, whereby users can programme a personalised curl sequence, which is then carried out with the press of a single button. Launched in tandem with the Chitosan styling products, Dyson's most recent launch helps it to retain its haircare crown. The tool - which like its predecessors uses Dyson's V9 motor and keeps the temperature below 150°C/300°F to avoid heat damage - adds three new attachments, bringing the roster of styling tool accessories to 16. Customers choose six of these accessories when purchasing, based upon their hair type and demands of their regime.



## **Myavana HairAI™**

This revolutionary form of hair analysis is completely personalised, designed to provide the ultimate solution for haircare enthusiasts who routinely struggle to find the right products for their hair type. The analysis technology examines texture, type and condition to provide science-based, individualised insights and a unique and precise breakdown of the products needed to nurture it. Users can access their digital profile anywhere and at anytime, so they can receive regular updates to their product recommendations. This subscription-based service offers monthly check-ins to monitor the ongoing health of hair, adapting recommendations accordingly.



# Mood lighting

*For those willing and able to invest in advanced care, LED tools offer costly but highly effective solutions for scalp health and hair growth, blending cutting-edge technology with proven long-term results.*

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39% of hair professionals "believe that AI can significantly enhance salon efficiency."



## **Foreo's FAQ™ 301 LED**

Foreo's advanced LED light therapy is applied to their latest innovation, a Strengthening Scalp Massager which is designed to combat thinning hair through the use of red LED light and T-Sonic™ massage, which stimulates follicles to promote growth. With 637 silicone bristles, this easy-to-use tool ensures even distribution of LED light. Accompanying tools maximise on its effectiveness, including the FAQ™ Scalp Recovery & Thick Hair Probiotic Serum and an app which, when connected, can provide suggested treatments unique to the user. Clinical trials of this new tool have demonstrated "significant hair growth within one month of use".



## **CurrentBody Skin LED Hair Growth Helmet**

In just 10 minutes of daily use, the CurrentBody hair regrowth device is clinically proven to drive a 128% increase in hair growth over 12 weeks. Safe, non-invasive and effective for both men and women, it stimulates and supports hair growth for those dealing with hair thinning and androgenetic alopecia. It can also reduce widening partings, a common issue for women experiencing hair loss as they age. Its use of red light therapy at wavelengths between 620-660nm enhance scalp blood flow, activate follicles and reduce the levels of the hormone DHT (Dihydrotestosterone), which when too high, can lead to hair loss.



# Beat the heat

*High-end styling tools use advanced tech to prevent heat damage while offering versatile styling, making them a smart investment for lasting hair health and flexibility.*

475m

As of September 2024, there are more than 475m posts on TikTok related to the Dyson Air Wrap.

14bn

The global hair styling tools market will grow from \$11.5 billion in 2024 to \$14.3 billion in 2029.

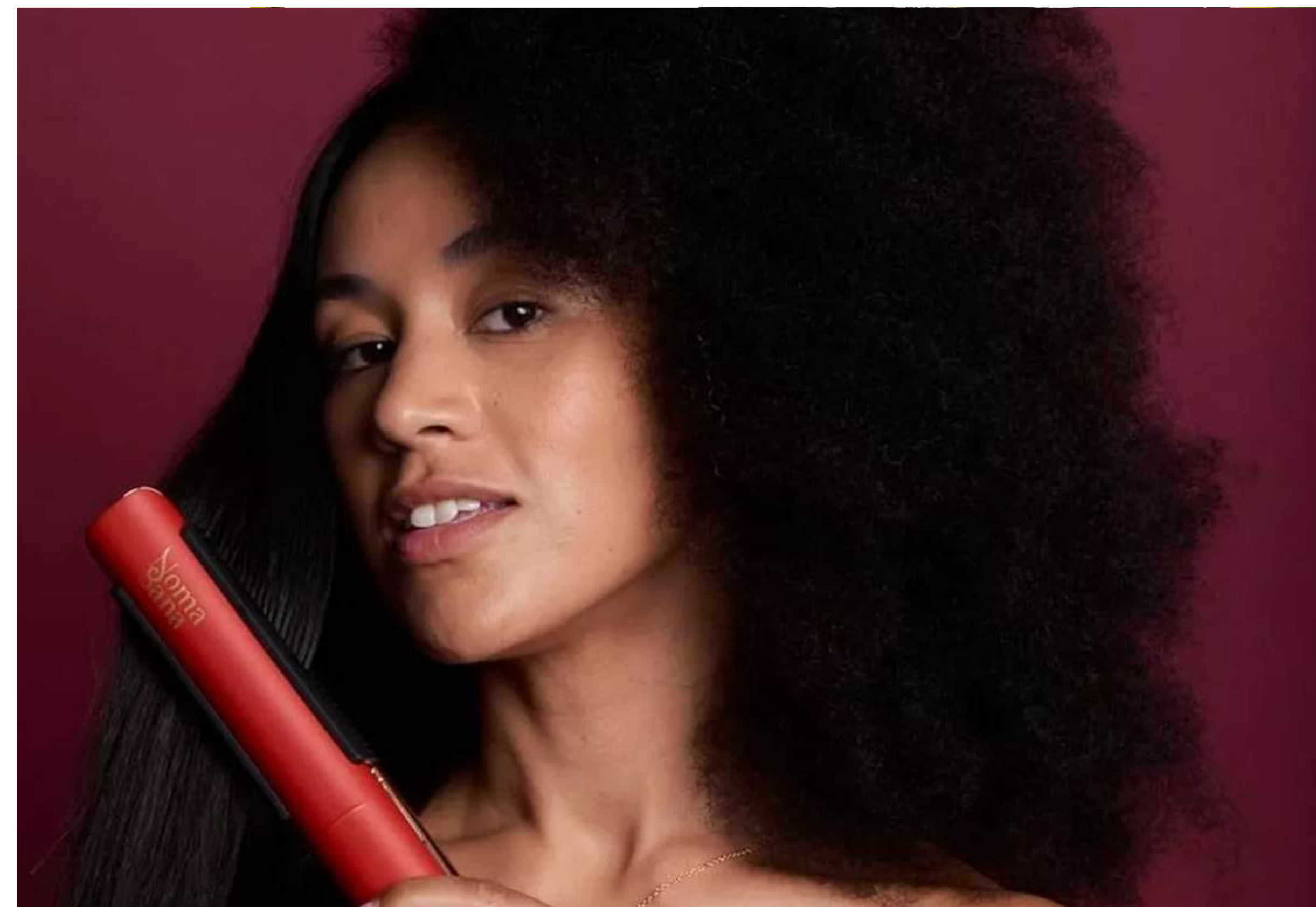
39%

39% of hair professionals “believe that AI can significantly enhance salon efficiency.”



## **ghd**

Earlier this year, the UK's no.1 straightener brand released its latest innovation, the Chronos straightener. It features HD Motion-Responsive™ technology to provide twice the responsiveness “for unparalleled heat monitoring accuracy”, three times faster styling, 85% more shine and the promise of style that lasts 24 hours. The Chronos comes hot on the tails of the viral, revolutionary Duet Style wet-to-dry styler, returning confidence to the idea that you can straighten and style your hair from wet without fear of serious heat damage. This is achieved through “ground-breaking Air-fusion™ technology”.



## **Noma Sana Silk Tress**

A “first of its kind” tool designed specifically for afro, coiled, kinky and textured hair types 3 and 4, a range of curls which have historically been significantly under-served. Launched by founder Lily Odogwu, Noma Sana's Silk Tress Straighteners feature flexible titanium plates, which are combined with a removable comb to support a reduction in breakage. Negative ion technology and adjustable temperature settings to control heat exposure help to improve hair health in the long term, whilst reducing frizz during styling. This is vital for curls at this end of the spectrum, as the hair tends to be drier and therefore more susceptible to heat damage.





Brands should tap into the Tech Voyager's future-facing purchasing goals, feeding their appetite for products which contribute to the effectiveness and efficiency of their routine. Exploring adjacent attitudes like the Track & Trend and the Beauty Harmonist who share their values, unlocks exciting market potential.

*How brands can engage with this consumer attitude:*

**Early Adoption:**

Tech-savvy consumers are likely to be early adopters of new products and innovations, helping brands establish a foothold in the market quickly.

**Brand Loyalty:**

By consistently meeting the high standards and expectations of these consumers, brands can cultivate loyalty among a demographic known for its enthusiasm and commitment.

**Feedback and Innovation:**

These consumers are often well-informed and passionate, providing valuable feedback that can drive iterative improvements and innovation in product development.

**Influence and Advocacy:**

Enthusiastic tech consumers frequently share their experiences and opinions with peers, acting as brand advocates and influencing the buying decisions of others in their network.

**Market Trends Insight:**

This consumer group is usually at the forefront of technology trends, offering brands early insights into shifting market dynamics and emerging opportunities.

**Premium Pricing:**

Brands can leverage the willingness of these consumers to invest in the latest technology by introducing products at premium pricing, enhancing profit margins.

**Brand Differentiation:**

Engaging with forward-thinking and innovative consumers helps position a brand as a leader in technology and innovation, differentiating it from competitors.

**Community Building:**

This consumer type often participates in forums, social media platforms, and other communities where they discuss their tech experiences, helping brands build and tap into engaged communities.

**Sustained Growth:**

By aligning with the progressive values and continuous learning attitude of tech enthusiasts, brands can ensure sustained interest and growth in a rapidly evolving market.

**Partnership Opportunities:**

Brands might find partnership opportunities with other companies that the Tech Voyager admires or follows, expanding their reach and credibility in the tech community.

These attitudes all emphasise modernity and high product standards in technology, design, and trendiness, making them complementary to the Tech Voyager. Brands can leverage this by promoting products that are technologically advanced, stylish, and on-trend, appealing to the Tech Voyager and those influenced by current styles and designs.



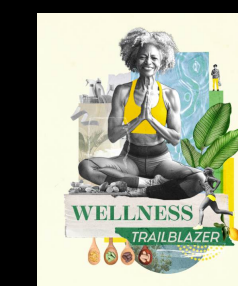
**The Track & Trend**

Both the Tech Voyager and the Track & Trend consumer groups are driven by a desire to stay current with the latest developments and popular products. The Tech Voyager focuses on the newest technology, while the Track & Trend follows broader market trends, including tech products when they are in vogue. Brands can appeal to both groups by emphasising innovation and modernity.



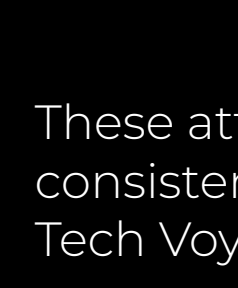
**The Beauty Harmonist**

This group values aesthetics and design, which can overlap with the Tech Voyager's interest in sleek, well-designed tech gadgets. Brands that emphasise the aesthetic and functional design of their technology can capture the attention of both tech enthusiasts and those who value the long-term healthy appearance of their hair, as achieved through the use of this technology.



**The Wellness Trailblazer**

While primarily focused on health and wellbeing, this group also appreciates innovative technologies that promote inner wellness. The latest haircare tools from styling wands and straighteners which promise no heat damage, to LED technology for promoted scalp health, will attract both Wellness Trailblazer consumers and Tech Voyagers.

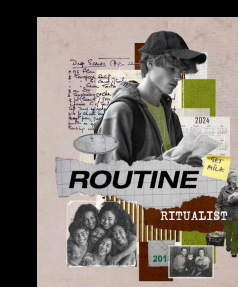


These attitudes prioritise different aspects of consumer behaviour—cost-efficiency, consistency, and environmental impact—none of which inherently align with the Tech Voyager's drive for innovation and the latest technology.



**The Savvy Saver**

This group prioritises economical choices and getting the best value for their money. They carefully consider their purchases, often opting for budget-friendly options and deals that offer long-term savings. Savvy Savers typically avoid the latest and potentially more expensive technologies that the Tech Voyager seeks, preferring reliable and cost-effective solutions. Their purchasing decisions are driven by practicality and financial prudence, aiming to minimise unnecessary spending while maximising utility and savings.



**The Routine Ritualist**

Valuing consistency and familiarity, this group sticks with trusted products and established habits. They are less inclined to adopt new technologies quickly, preferring items that fit seamlessly into their routines. However, whilst the Routine Ritualist does prioritise reliability, ease of use, and the comfort of familiar products, they also can embrace new tools which enhance the effectiveness of their routine. Here they do align with the purchasing goals of the Tech Voyager.



**The Eco Guardian**

While there can be overlaps with eco-friendly technologies, the primary focus of the Eco Guardian is sustainability and reducing environmental impact, which may not always align with the Tech Voyager's pursuit of the newest tech products regardless of their environmental footprint.

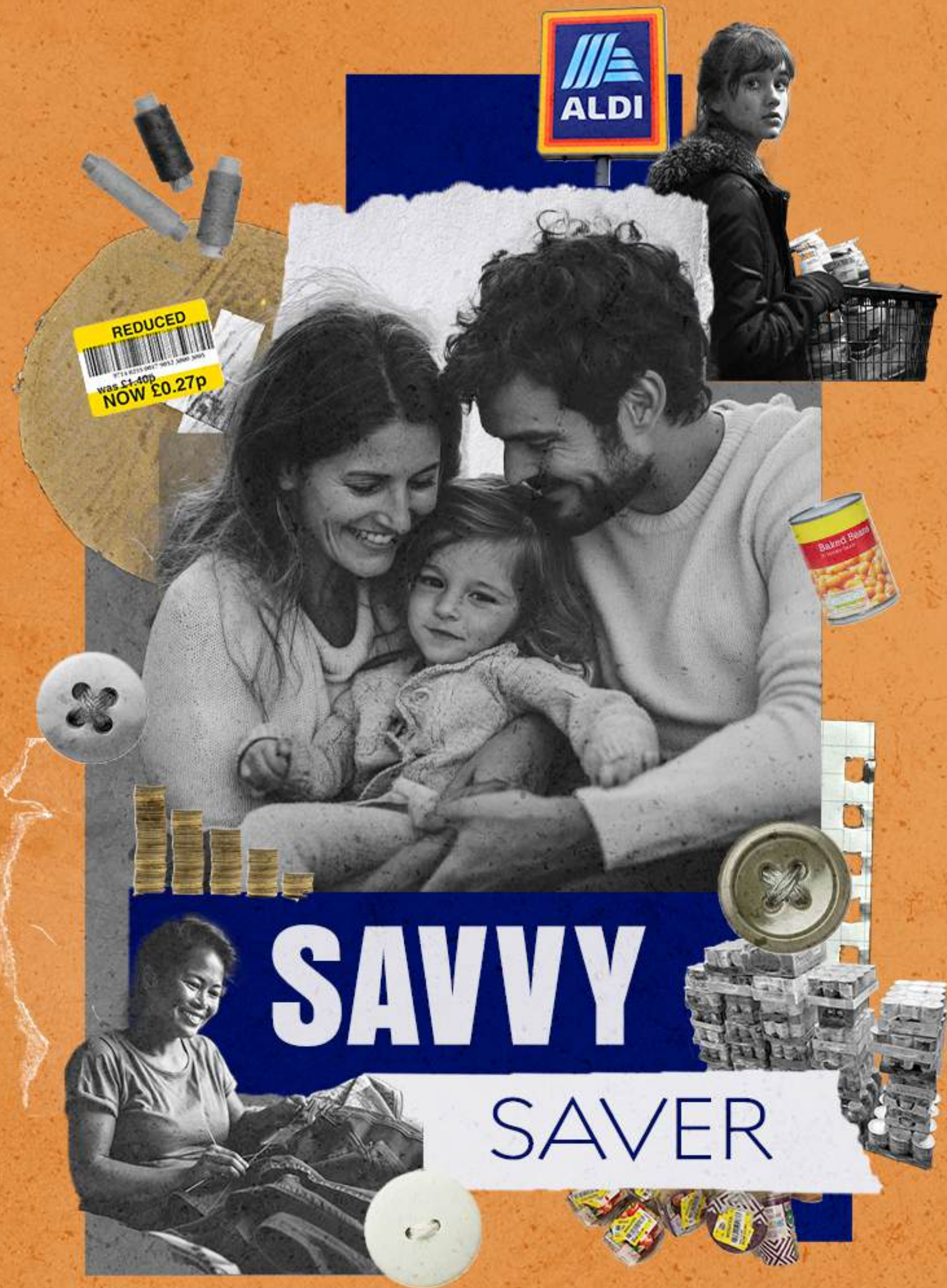


CONSUMER ATTITUDE

# The Savvy Saver

Driven by a necessary desire to reduce unnecessary spending, the Savvy Saver's purchasing decisions are based upon value for money, from the cheapest option available to capitalising on deals of the moment, or strategic purchases which save them money over time.

Value-conscious • Frugal • Discount-driven • Brand-flexible • Deal hunters • Resourceful • Practical • Strategic • Economical





During this difficult period of tightened purse strings for many, the **Savvy Saver** and their attitude to spending is strategic and practical in their approach to purchasing haircare products. They focus on finding the best value for money and making informed decisions to reduce spending while still maintaining their haircare routine.

The Savvy Saver is the group most driven by the cost of living crisis, which has significantly affected their disposable income. They therefore seek products which meet basic quality demands in their haircare regime, without compromising on essential quality.

They feel little allegiance to individual brands; their loyalty lies more with retailers who can offer them deals on brands, or whose own-brand products are competitively-priced. Retailers will also gain allegiance from the Savvy Saver through loyalty schemes and bulk-buying deals, which reduce the per unit cost and allowing them to save money over time whilst taking advantage of higher quality products.

Due to the broad impact of the cost of living crisis, this multi-generational group spans younger generations funding their day-to-day life independently for the first time, through to older generations who will likely be supporting younger members of their family.

Their savviness also lies in their ability to DIY. They tap into trends they find online, sourcing haircare solutions or multi-use products which can replace specialised items, to further cut down on costs.

Over the past year, there has been a 30% increase in private label spending, as 27% of shoppers point to this switch as “an essential part of their cost-saving strategy in 2024.”

*NielsenIQ, 2024*

Feeling the affects of inflation, in 2022 “36% of consumers bought more store-brand and generic products...2023 saw similar trends”.

*National Retail Federation, US*

Category spending was predicted to fall in 2023 due to the effects of inflation. It was believed this lead to “more competition for premium brands from the “masstige” segment, where players are offering premium ingredients, features, and aesthetics at a lower cost to consumers.”

*Euromonitor International, 2023*

Almost one third of customers across eight countries shared that they now purchase more private label products than pre-pandemic - “particularly Gen Z and Millennials”.

*Snipp, 2023*

Almost half (47%) of customers believe that smaller or local brands are more cost-effective than bigger household-name brands.

*NielsenIQ, 2024*



# Influencing trends

## Perfecting the basics

Where it once was taboo for 2-in-1 haircare products to be used - many operating under the belief that combining products would diminish the capabilities and effects of both - vastly improved formulas of today mean we are seeing a return to multi-functional products which remain highly efficacious.

Basic but highly effective formulations in single products are of significant benefit to the Savvy Saver, and as innovation in ingredients, as well as the delivery system of products continues to rise, costs will continue to be lowered.

Waterless haircare is another example of a growing trend amongst this group, made possible by major household brand names releasing products such as shampoo bars.

*Aligns with:*  
Eco Guardian

## The right tools for the job

Day to day tools which build on the heritage of key producers such as detangling combs and brushes, are becoming more efficient in supporting the demanding logistics of caring for and styling curly hair - without adding a huge amount to the cost.

These high performances brushes and combs will continue to rise significantly into 2025, offering anti-static and detangling properties to support the health of many different types of hair.

Crafted from high quality materials ensures that these tools are durable and long-lasting.

This includes the popular at-home 'scalp facials', with easy-to-use scalp massagers and stimulators becoming increasingly available and cost-effective.

*Clashes with:*  
Tech Voyager

## Democratising haircare categorisation

More own-brands and value labels are providing a broader spectrum of categories in haircare to help Savvy Savers of the world to meet the specific demands of their hair, without breaking the bank. This includes catering to specific curl types, as well as an understanding of demands related to hair loss, dandruff, hydrating and strengthening.

What were once specialised ingredients are also becoming democratised, such as hyaluronic acid and argan oil.

The growth of this trend is accompanied by heightened knowledge amongst consumers (of all spending capabilities) of the ingredients which support their individual needs. This is also fuelling a rise in homemade products, such as masks, oils and conditioners which promote strengthening and growth.

*Aligns with:*  
Routine Ritualist



# Anything but basic

*Creative, independent haircare brands delivering salon-worthy results without the salon price tag, blending innovation with accessible luxury.*

47%

47% believe smaller or local brands are more cost-effective than bigger brands.

1/3

Almost 1/3 of customers shared they now purchase more private label products than pre-pandemic.

36%

2022 saw "36% of consumers bought more store-brand and generic products...2023 saw similar trends".



## Being

A brand driven by community, Being aims to supply products which cater to all hair types, in a voice which demystifies what can be a complex routine, and formulas that are hard to understand in why they benefit you. Being aims to improve literacy around hair needs, with the support of expert trichologists and professionals, and an online quiz customers can complete themselves. Whilst of a high quality and promising professional-grade results, the pricing is on the affordable end of the specialised haircare spectrum, providing elevated, Gen-Z friendly packaging and customisable routines at accessible costs.



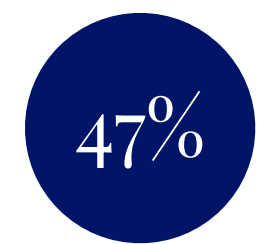
## ARKIVE

Founded by renowned stylist Adam Reed, ARKIVE makes holistic haircare and the nurturing of internal wellness accessible with its unique approach to 'headache'. For a salon-quality, prestige haircare brand, ARKIVE is more competitively priced than its high quality peers and provides access to renowned hair stylist Reed, who trained under Charles Worthington. Scent plays a significant role in this range; two signature fragrances based on Reed's memories evoke a sense of peace, calmness and relaxation. B-corp certified status adds to the brand's sense of holistic wellness, with customer's confidence in its cruelty-free, vegan formulations and recycled packaging.

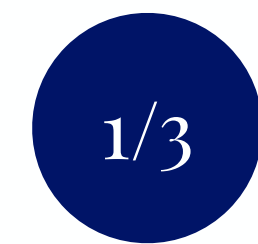


# Own-brand bestsellers

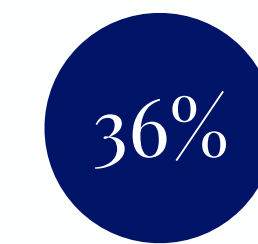
Major retailers are stepping up with own-brand haircare launches, infusing innovation inspired by viral trends to offer enthusiasts salon-quality results at accessible prices.



47% believe smaller or local brands are more cost-effective than bigger brands.



Almost 1/3 of customers shared they now purchase more private label products than pre-pandemic.



2022 saw "36% of consumers bought more store-brand and generic products...2023 saw similar trends".



## Lacura

Aldi's Lacura has perfected the art of bringing dupes of some of the most popular, viral products to its shelves. Good quality at an accessible price point, it brings hero formulations and ingredients to the masses. From honey-infused hair oil inspired by Gisou, to the Multi-Peptide Serum for Hair & Scalp and the Hydrate & Moisturise Scalp Serum with ingredients like caffeine, hyaluronic acid, and amino acids, which is 80% cheaper than the alternative from The Ordinary. And of course, the 'Wonder' range emulating the success of ColorWOW. Aldi adds to the popularity of its products through Limited Edition launches, which again tap into its viral capabilities in accessible dupes.

## SEPHORA COLLECTION

The Sephora Collection haircare range offers shampoos, conditioners, treatments, and styling essentials for various hair types, priced between £5 to £20. Combining quality and affordability, it features innovative ingredients like nourishing oils and hydrating butters, delivering salon-quality results. What sets it apart is its clean, minimalist formulations free of parabens, sulfates, and harsh chemicals, providing a premium experience while being inclusive of different hair needs. This blend of affordability, ingredient transparency, and effectiveness makes Sephora's range stand out against other own-brand lines, offering both value and quality to consumers.



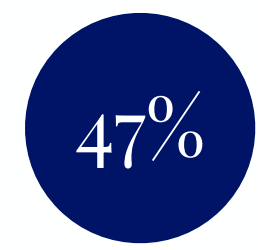
# Progressive planet-friendly value

*Innovative eco-friendly haircare offers budget-friendly solutions that are not only sustainable, but also long-lasting, making quality accessible to those with less disposable income.*

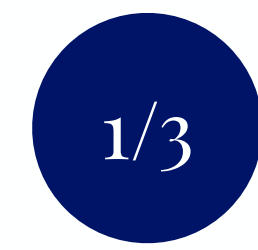


## **Tangle Teezer**

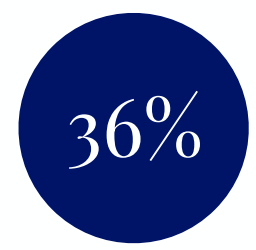
Highly-effective yet highly affordable, the Tangle Teezer paved the way for a hair tool which supported the health of your hair while brushing and styling. Most recently, the brand launched an eco-friendly option made from 85% sustainably-sourced castor beans. However this new launch loses none of the brand's patented two-tier teeth technology; gentle on both wet and dry hair, the flexible, longer teeth gently detangle hair, while the shorter teeth smooth the cuticle, reducing breakage, frizz, and promoting shine for various hair types. High performance is combined with long-lasting innovation, ideal for the Savvy Saver.



47% believe smaller or local brands are more cost-effective than bigger brands.



Almost 1/3 of customers shared they now purchase more private label products than pre-pandemic.



2022 saw "36% of consumers bought more store-brand and generic products...2023 saw similar trends".



## **P&G**

Proctor & Gamble has brought shampoo bar innovation to its range of household-name brands, including Pantene, Herbal Essences, Aussie and Head & Shoulders. While the initial price may be similar to or slightly higher than liquid shampoo, bars generally last longer, as they are concentrated and require less product per use. Paired with minimal packaging, P&G's goal was to introduce a more sustainable, eco-friendly range of waterless products, as independent competitors push innovation forward. There is significant opportunity for P&G to lead the pack more in this space, rather than a more tokenised approach to a sustainable launch.





Brands should tap into the Savvy Saver consumer attitude to leverage their cost-conscious purchasing habits and explore adjacent attitudes like the Routine Ritualist and the Eco Guardian, which also value economical and sustainable choices, unlocking substantial marketing potential.

*How brands can engage with this consumer attitude:*

**Volume Sales:**

Savvy Savers are often drawn to promotions and bulk buying opportunities, which can boost sales volumes during discount and clearance events.

**Customer Loyalty:**

By consistently offering value for money, brands can build loyalty among consumers who prioritise cost-effectiveness over brand loyalty.

**Brand Advocacy:**

Savvy Savers tend to share good deals with their network, acting as brand advocates when they find exceptional value.

**Market Penetration:**

Lower-priced or value-oriented products can help brands penetrate markets where price sensitivity is a key consumer trait.

**Feedback for Cost Efficiency:**

These consumers can provide valuable feedback on pricing and product features, helping brands streamline offerings to maximise value.

**Enhanced Brand Image:**

A reputation for delivering value can enhance a brand's image, positioning it as a customer-centric and economically aware choice.

**Increased Traffic:**

Regular promotions and discounts attract more footfall or online visits, creating opportunities to sell additional products.

**Data Collection:**

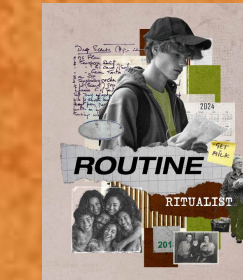
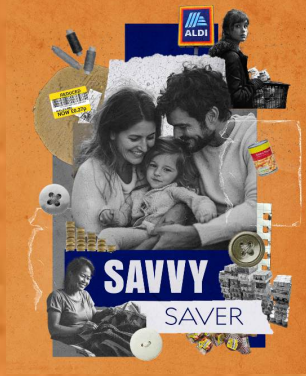
Promotions and deals that require sign-ups provide valuable data for future marketing strategies and customer behaviour analysis.

**Cross-Selling Opportunities:**

By engaging customers looking for value, brands can introduce them to other cost-effective products in the lineup.

**Long-Term Customer Engagement:**

By aligning with the financial goals of Savvy Savers, brands can maintain long-term relationships with a broad base of cost-conscious consumers.



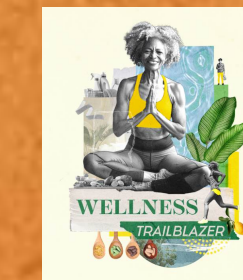
**The Routine Ritualist:**

This group and the Savvy Saver both prioritise reliable and practical solutions. The Routine Ritualist's focus on consistency and trust in familiar products complements the Savvy Saver's emphasis on value and economical spending. Brands that provide dependable products at a reasonable price can appeal to both attitudes, offering longevity and cost-effectiveness.



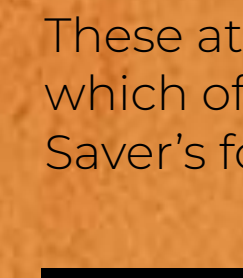
**The Eco Guardian:**

While their primary focus is on sustainability, the overlap with the Savvy Saver comes from the shared interest in long-term cost savings through sustainable choices. Eco-friendly products often reduce energy consumption and waste, which aligns with the Savvy Saver's goal to economise. Brands can market environmentally-friendly products not just as ethical choices but also as economically beneficial in the long run.



**The Wellness Trailblazer:**

The link here is the emphasis on long-term value and health benefits. Savvy Savers look for products that are cost-effective over time, similar to how Wellness Trailblazer consumers choose products that promise lasting health benefits. Brands that highlight both the financial and health advantages of their products can capture the interest of both consumer types.



**The Tech Voyager:**

This consumer group's focus on the latest and most advanced technology often means they prioritise innovation and novelty over cost-effectiveness, which can lead to higher spending rather than saving. Their eagerness for the newest tech gadgets may not align with the Savvy Saver's goal of reducing unnecessary expenses.



**The Track & Trend:**

Followers of the latest trends and mainstream popularity, this group often purchases items based on current fashion rather than long-term value or utility. Their frequent shifts to stay in line with what's popular can lead to higher consumption and less focus on saving money, which contrasts with the Savvy Saver's emphasis on economical and strategic purchases.



**The Beauty Harmonist:**

Although this group does consider aesthetic quality in their purchases, they often prioritise design and beauty over cost, which may lead them to choose more expensive products simply for their visual appeal. This tendency for higher spending on premium, design-focused items does not generally align with the Savvy Saver's more budget-conscious approach.







CONSUMER ATTITUDE

# The Eco Guardian

Dedicated to protecting and preserving the environment, the Eco Guardian actively seeks to safeguard our planet through a commitment to sustainability in daily choices and consumption habits.

Environmentally-conscious · Sustainable · Eco-friendly · Green · Responsible · Ethical · Protective · Resource-conserving · Organic · Earth-minded



The largest and most powerful group, the **Eco Guardian** is arguably the most influential, as a drive to be more eco-friendly is shared by many haircare brands. However the Eco Guardians expect these companies to be exercising these green practises as standard, to meet their forward-thinking demands.

Champions of the conscious consumption movement, the Eco Guardian will avoid needless additions to their haircare regime, seeking instead multi-functional products which help them to reduce their waste contribution.

However, brands will certainly be capable of enticing new Eco Guardian customers through a commitment to sustainable, natural and organic ingredients, housed in packaging which is minimal, reusable, or refillable. Water conservation, innovative formulas and waterless/solid delivery systems which contribute to this movement are key to building loyalty with this group.

With this should come clear, honest, authentic marketing. The Eco Guardian is committed to researching the products they're purchasing, and expect brands to be a communicative and upfront in launching their products to the world. It is for this reason that smaller and local independent brands appeal to the Eco Guardian, eco-conscious in their smaller batch productions which reduce their carbon footprint.

Eco Guardians span multiple generations, from Gen X and Baby Boomers who recognise their purchasing power, to younger Gen Zs who expect companies to prioritise sustainability as standard - and know their power in moving market leadership dial.

In 2022, 64% of US women declared sustainability to be very important when considering the choice of a beauty product, including haircare.

*GCI Magazine, 2022*

“Twenty percent look for sustainable packaging, 25% look for sustainable ingredients and 38% search for formulas that are clean/free of harmful chemicals.”

*GCI Magazine, 2022*

A reported 3.1kg of greenhouse gas emissions are produced during the average salon appointment, attributed to hairdryers, washing machines and air conditioning.

*British Beauty Council, 2023*

43% of British women want their salon to be more active in reducing carbon footprint.

*British Beauty Council,*

*2023*

The global organic hair care market was valued at approximately \$8.3 billion in 2022. It is expected to reach around \$12 billion by 2030.

*Statista, 2023*



# Influencing trends

## Waterless Haircare

Despite offering no real benefits to the cleaning or the health of our hair, the majority of haircare products have water added to them.

With water expected to become more of a scarcity, industries including haircare are putting significant pressure on this depleting resource. When you add the pollution caused by wastewater, as well as the carbon footprint caused by transporting water-based products, it is unsurprising that companies focusing on waterless products are set to perform very well.

Advancements in this space are expected to continue as product innovation moves beyond shampoos. Improved performance in lathering ability, cleansing ability, and personalisation to provide specific benefits for individual consumer needs add to its potential. Costs saved in longer lasting capabilities will also draw in more and more customers.

*Aligns with:*  
Savvy Saver

## Maximising minimalism

There is growing concern surrounding the popularity of viral products which are fuelling significant over consumption. Trends including hair cycling are driving consumers to oversubscribe to products which they will likely use for only a limited time.

Eco Guardian consumers are accelerating a movement in response to this concern, celebrating under-consumption. Here the hero products are multi-functional, championing ingredient innovation and bringing together formulations which achieve goals of cleansing, hydrating, strengthening and more.

As with many trends ahead for haircare, the growing number of brands offering hyper-personalised products will allow brands to supply customers with multifunctional formulations which support their specific needs.

*Clashes with:*  
Track & Trend

## Bioengineering

The use of biotechnology in haircare is tapping into the hero combination of natural and fermented ingredients, and bioengineered ingredients which boost their efficacy.

Not only does this help to overcome issues related to over-farming, lab-grown ingredients can often ensure heightened efficacy without reliance on prime growing conditions amidst the climate crisis.

The use of stem cell treatments and the ability to provide highly targeted solutions through DNA analysis represent the future of bio-engineered haircare. As well as overall health and growth of strong hair, it can also benefit factors such as hair colouring and dyes which are less harmful to the scalp.

This is combined with the ability of these ingredients to breakdown in a way that is friendlier to the body, and the planet.

*Aligns with:*  
Eco Guardian



# Waterless wonders

Explore the future of waterless hair care with breakthrough, eco-friendly formulations that reduce waste in every step – from creation and packaging to transportation and your everyday routine.

64%

64% of US women declared sustainability to be very important when choosing a beauty product.

43%

43% of British women want their salon to be more active in reducing carbon footprint.

12bn

The global organic hair care market is expected to reach around \$12 billion by 2030.



## Kitsch

Kitsch incorporates the ancient tradition of fermented rice water in its shampoo bars, which nourish, strengthen and help “to repair damaged hair follicles & prevent split ends”. The rice protein has been shown to “increase hair volume by 20% after 5 washes”, while also balancing pH, protecting colour-treated hair, and boosting shine. This concentrated, waterless formula lasts up to 100 washes, making it ideal for those looking to reduce consumption. Additionally, the bars are biodegradable and free from harmful chemicals like sulfates, parabens, and silicones, reducing environmental impact and water contamination.



## The Powder Shampoo

A waterless, eco-friendly haircare product that offers a sustainable alternative to traditional shampoos, this unique powder formula activates with minimal water, effectively cleansing hair and absorbing oil while reducing water consumption. Highly concentrated, a small amount goes a long way, making it both cost-effective and ideal for travel. The lightweight design reduces shipping-related carbon emissions, and it's free from harmful chemicals, aligning with environmentally conscious beauty practices. This innovative approach to haircare supports sustainability and water conservation efforts.



# The next generation of at-home colour

*The latest in progressive at-home hair colour that combines cutting-edge innovation with eco-friendly formulations, ensuring sustainable beauty choices without compromising on vibrant, salon-quality results.*

64%

64% of US women declared sustainability to be very important when choosing a beauty product.

43%

43% of British women want their salon to be more active in reducing carbon footprint.

12bn

The global organic hair care market is expected to reach around \$12 billion by 2030.



## O&M

Original & Mineral (O&M) is recognised for its commitment to clean, salon-quality haircare, free from harmful chemicals like sulfates, parabens, and ammonia, honouring its motto, "healthy hair starts when it's clean." The brand emphasises eco-friendly practices, using recyclable packaging and sustainably sourced ingredients, and its formulas focus on natural extracts to nourish hair without environmental compromise. Reviews highlight the brand's effectiveness, particularly the nourishing qualities of the "Seven Day Miracle Masque" and the sulfate-free shampoos for delivering impressive results, more effective when using a recommended three-step cleanse.

## Ribo Professional Infusion Lands

Terre Infusion by Ribò Professional is a vegan, plant-based hair colour treatment made from natural pigments like leaves, roots, flowers, and fruits. It offers long-lasting colour while nourishing and strengthening hair, free from harsh chemicals like ammonia, PPD, and parabens, making it ideal for sensitive skin. Its dermatologically-tested formula regulates sebum and reduces dandruff, setting it apart from competitors. This eco-friendly product blends botanical pigments to provide vibrant colour and scalp protection, making it perfect for those seeking a natural, sustainable hair colouring experience.



# Make it green, make it game-changing

*Innovative haircare brands are redefining beauty with sustainable formulas, eco-friendly packaging, and planet-positive practices that make going green effortlessly stylish for the next generation.*

64%

64% of US women declared sustainability to be very important when choosing a beauty product.

43%

43% of British women want their salon to be more active in reducing carbon footprint.

12bn

The global organic hair care market is expected to reach around \$12 billion by 2030.



## The Rootist

One of the most progressive, eco-friendly haircare brands due to its biotechnology-driven approach, The Rootist's patent-pending "Rootbiomic Ferment," a vegan multivitamin superfood helps to balance the scalp microbiome and strengthen hair. This ferment, made from natural ingredients like Chinese skullcap root, red ginseng, and reishi mushroom, supports hair health and repair. The brand treats the roots, scalp, and hair as a single ecosystem, diverging from traditional haircare methods. Additionally, The Rootist's innovative packaging, such as its brush-on dry shampoo powder, minimises waste and ensures precise application.



## Rhyme & Reason

This range of products features formulations that are over 92% naturally derived, cruelty-free, vegan, and free from sulfates, silicones, and parabens, offering a variety of solutions tailored to different hair needs while maintaining their eco-friendly approach. It's dedication to sustainability and reducing plastic waste is found in its bottles and caps which are made from 100% recycled plastic. They also use ocean-bound plastic in their packaging to prevent pollution, leading their #NoNewPlastic campaign. Additionally, they donate 1% of global sales to the Galapagos Conservation Trust, supporting endangered species and ecosystems.





Brands should be conscious of the highly knowledgeable and driven consumer that is the Eco Guardian, delivering transparency and authenticity. This powerful group aligns naturally with those who recognise the importance of wellness, as well as the Tech Voyager who invests in a greener future through technology.

*How brands can engage with this consumer attitude:*

**Brand Loyalty:**

Eco Guardians are loyal to brands that share their commitment to sustainability and environmental protection, creating long-term customer relationships.

**Premium Pricing:**

Consumers dedicated to environmental causes are often willing to pay a premium for products that are sustainably sourced and manufactured.

**Market Differentiation:**

Brands that successfully communicate their environmental initiatives can distinguish themselves from competitors, attracting a dedicated consumer base.

**Enhanced Brand Reputation:**

Being aligned with environmental values can significantly improve a brand's image and appeal, as consumers increasingly seek out companies with strong corporate social responsibility.

**Access to Niche Markets:**

Sustainable products often cater to niche markets that are underserved, providing brands with an opportunity to lead in specialised categories.

**Regulatory Compliance:**

Aligning with sustainability helps brands stay ahead of increasingly strict environmental regulations and avoid potential fines or sanctions.

**Innovation Drive:**

The demand for eco-friendly products encourages innovation in product development, materials, and production processes, leading to overall business improvement.

**Customer Advocacy:**

Eco Guardians are likely to advocate for brands they believe in, using their personal platforms to influence others and expand the brand's reach.

**Reduced Operational Costs:**

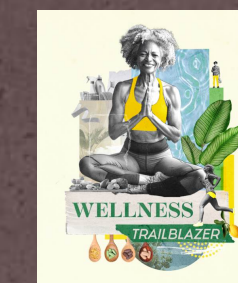
By adopting more sustainable practices, brands can also reduce waste and energy costs, leading to better efficiency and profitability.

**Stronger Stakeholder Relationships:**

Companies that prioritise sustainability often build stronger relationships with not just consumers but also employees, investors, and regulators, who value environmental stewardship.



Each of these attitudes shares some core values with the Eco Guardian, such as a focus on sustainability, health, cost-effectiveness, and aesthetic quality in their products. By understanding these overlaps, brands can more effectively tailor their marketing strategies to appeal to eco-conscious consumers, while also meeting the specific needs and preferences of these related attitudes.



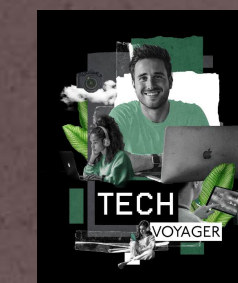
**The Wellness Trailblazer:**

This consumer group values health and tranquility, often preferring natural, organic, and eco-friendly products that support holistic wellness. Their focus on health and balance aligns well with sustainable initiatives. Brands can capitalise on this overlap by offering products that enhance both environmental sustainability and personal wellbeing.



**The Track & Trend:**

This group is driven by the latest trends and mainstream popularity, which today, often aligns with kindness to the planet. Their regular use of social media means much greater visibility and understanding of the impact of their purchases. The brands they follow and purchase from aligns with the value of their friends and followers.



**The Tech Voyager:**

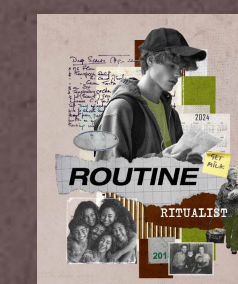
Focused on the latest technology and gadgets, the Tech Voyager's interests often match the Eco Guardian's dedication to environmental impact. Their passion for innovation and pursuit of new tech ensures they are sourcing the latest gadgets often use energy more efficiently, and work faster in drying, styling, etc. to reduce the time spent using energy.

These attitudes tend to have different primary motivations that do not inherently prioritise environmental sustainability. For brands focusing on eco-conscious strategies, understanding these differences is crucial for effectively targeting or adapting their approaches to potentially bridge these gaps.



**The Savvy Saver:**

Primarily focused on budget-conscious decisions, the Savvy Saver will prioritise cost over all other factors; if a brand offers a product deal which features packaging that cannot be recycled, this would not deter the Savvy Saver. Where brands raise prices in order to provide greener ingredients and/or packaging, they will lose the loyalty of this group. However, in haircare there is an allegiance between the two archetypes as the Savvy Saver naturally leans into under consumption and conservation through minimalist routines and waterless products.



**The Routine Ritualist:**

This consumer type values consistency and tradition, often sticking with long-used products and habits. Unless their established routines already include a focus on sustainability, they may be less open to adopting new, eco-friendly products that require a change in their habitual consumption. Their primary drivers are reliability and familiarity, which might not necessarily align with an environmental focus, unless those habits were environmentally oriented from the start.



**The Beauty Harmonist:**

This attitude focuses on aesthetics and a harmonious lifestyle, which can at times intersect with a preference for products that are sustainably produced...when also beautifully-designed. Where brands design eco-friendly products whose formulations and packaging are kind to the planet yet less aesthetically pleasing, will see the Beauty Harmonist turn to other options.



# The challenges

## Authenticity in influence

With the growth of celebrity brands having accelerated in 2024, it is clear that these highly influential figures offer significant potential, using their platform to bring innovative new products to market which meet specific needs of customers.

This is particularly true of brands created for curl inclusivity and women (and men) of colour, who have traditionally been significantly underserved.

What must be remembered however is that even when a celebrity has a legion of fans, they are not immune to criticism or being called out. Therefore the figure at the helm of the brand must be as core to the development, production and communication of the brand as any small business owner.

It wasn't until Beyoncé released a video of her using her own Cécred range, were certain fans silenced in their criticism (or disbelief) that she did not use her products herself.

## The dangers of the micro-trend

It is natural to want to emulate the successes of brands at the heart of some of the most viral micro trends dominating social channels. However these are not key to long term innovation, influence and success.

It is of vital importance that brands remain focused on building a solid foundation for their identity - what makes them different, what their core values are, and how they are communicated. Whether that is through the founders or influencers you are led by or partnered with, your unique proposition, or even as simple as your tone of voice.

In building this over a period of time, it ensures that creativity and innovation from your brand is unique to you, and earns its place amongst the biggest trends of the year. Ideas fostered can then give extra weighting to this, or open a new door. Hailey Bieber's Rhode phone case is a great example.

## Curl - and brand - protection

Where brands build a cult following in their serving of customers whose needs to date have not yet been met, these businesses must remember that these consumers are putting something very precious in their hands - the health of their hair.

This is, again, particularly true for those with textured, coily and curly hair, who from a young age will have developed routines and selected products which protect its health.

Brands such as DevaCurl and Mielle Organics have recently faced significant backlash due to customer feedback which has shone a very damaging spotlight on the apparent harm these products have caused over a period of time.

It is therefore of more importance than ever that brands not only speak on a level with their community of customers, but they also ensure they spotlight scientific efficacy and success in formal trials.



# The challenges

## Facing the future

The rapidly shifting climates we now encounter month on month, year on year, have left many brands feeling the pressure of how to deliver for customers who are unsure of what demands they need to meet on an almost daily basis.

It is of vital importance that brands meet consumers' needs based on shifting seasonal and environmental demands. Product innovation has already come on leaps and bounds in this arena, such the growth in SPF and UV protection products.

However, this needs to be combined with a dedication to reducing contributions to climate change in formulation development and packaging. More than ever, sustainable practices, production facilities and supply chains must account for pressures which popular countries for manufacturing are experiencing in extreme weather conditions during certain periods of the year.

## Innovation, or tokenism?

It is the work of independent brands and start-ups where we are seeing some truly exciting innovation, not only in the diversification of products, but also planet-friendly formulations and progressive methods of delivery.

The solid shampoo bar space has been dramatically underserved to date, particularly by the major household-name brands and the powerhouses behind them. Whilst we may see companies like Proctor & Gamble bringing these products to market, their presence on shelves remains apologetic and feels forgotten.

More must be done to put these products on the map - simply achieved by putting them on a higher shelf, and with some boosted marketing efforts. The power of this simple but highly effective method of reducing water usage to ultimately support a healthier planet must be given greater priority.

## A not so positive plug

Whilst we are seeing incredible strides forward in haircare technology from major brands who are solving issues related to heat damage, long-lasting style and curl protection, it is very important that brands consider aspects of their technology which may seem minor but can become a deal breaker.

Leading beauty journalist and author, Sali Hughes, flagged one such issue with leading haircare brand, Dyson. With the launch of the Airstrait she shared a glowing set of pros communicating the efficacy of the the tool. However, a seemingly minor element becomes a major point of confusion in how a piece of tech engineered so beautifully can trip up so significantly - an incredibly oversized plug. The tool cannot travel because you can't convert the plug to other countries, instead having to purchase the dedicated gadget for that country. The comments on her review became overwhelmingly focused on this comical con.



# The opportunities

## *Understanding your sector*

In a space experiencing staggering growth and diversity, yet with more growth potential and space for innovation (in particular for burgeoning private and own label brands), do you understand where your brand's potential lies?

## *Understanding your audience*

Once your path to growth becomes clearer, establishing the customers who offer the potential for success and for whom your products are most desirable, is the next step in ensuring you are successful in the launch of a new brand or product. Do you recognise which consumer attitude you hold power with, and is this the audience you wish to nurture?

## *Understanding your product*

With your audience comes a clear goal of what it takes to build a product which truly appeals to them. From ingredients and formulation, to packaging and pricing, brands must approach every stage of production with honesty, integrity and authenticity. Does your range meet the standards of the educated and demanding customer of today?

## *Understanding your communications*

The means by which you deliver your product to your desired consumer is key. The world is retuning to the high street, and experiential retail combined with intelligent, targeted online platforms - not to mention the ongoing growth of social commerce - is an art form which must be learned in order to deliver to your target audience. Do you know where your consumers are sourcing and shopping?

## *Understanding your competition*

No longer are you competing solely with other brands, the types of customers you may be alienating must be considered in when considering a new product or brand goal. How do you appeal to one without driving away another?

## *Understanding your identity*

It may be that you are approaching a new product - or a revamp of your brand - in order to enter a new space or appeal to a new consumer audience. Is your brand identity clear, and are you able to retain your existing consumer base, whilst entering a mission to engage with new attitudes?







# Here to help

We hope you enjoyed digesting our insights, the opportunities available within the home care sector and of course, the attitudes which consumers of today are naturally finding their allegiances lie within.

We would be thrilled to help you discover where your consumers stand, which attitudes you would like to target, and importantly, how you can reach them.

Please do not hesitate to get in touch.

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