



haircare

— 2021 —

OUR SELECTED TRENDS,
INSIGHTS & OBSERVATIONS

ftb.
CROWSNEST
trend horizons

WELCOME

One thing the COVID pandemic has taught us is that we are conscious of our hair more than ever. Many are still desperate for a cut and colour now salons are open again, others are enjoying the freedom of a shaved head or experimenting with colour and others finally embracing the grey. One thing for sure is that we have become closer to our hair, the good, the bad and the 'Zoom ready.'

We've noticed some significant shifts within haircare which has traditionally been regarded a flat category. Haircare brands are learning from skincare, with advanced ingredients, new regimes and formula developments for 2020. In addition, the colour category has seen a huge boost and lifestyle drivers further growing the global haircare market – which is forecast to reach \$211.1bn by 2025*

Sustainability continues to be a buzzword, encouraging mainstream consumers to consider how their products affect the planet both before and after use.

We hope you find this study useful and as specialists in Beauty branding & communication, we would love to discuss the topics raised here with you.

**(Grand View Research, 2018).*

KILLER STATS

\$211bn

The global haircare market is forecast to reach £211.1bn by 2025

\$217m

Prestige haircare sales in the US grew 21% to \$217m in the second quarter of 2019

\$710.67m

The anti-ageing hair product market will grow by this during 2019-23

OUR AREAS

ONE

DIY BEAUTY

BRAND HELPFUL
CREATIVE COLOUR
GRAYCEFUL

TWO

SUSTAINABILITY

WATERLESS WONDERS
LESS IS MORE
NATURAL & ETHICAL

THREE

SKINIFICATION

SUPER SERUMS
BEAUTY BOOSTERS
SCALP HEALTH

DIY BEAUTY

BRAND HELPFUL | CREATIVE COLOUR | GRAYCEFUL

Some trends you just can't predict.

The pandemic has drastically altered our approach to beauty. For some, beauty routines have taken a back seat. For others it has become all the more important - self-care in such uncertain times.

We've seen some incredible innovation from brands, switching their services online and gaining new audiences, online ordering has grown dramatically along with 'how to' videos and inspiring sharable content. The brands doing an excellent job have really stood out and will reap the rewards of long term loyalty

48,703

Google searches for 'root touch up' grew by 340.7% to reach 48,703 searches in the US between February 16 and March 28 2020*

441%

441% increase in searches for "temporary hair dye" globally between March 9-22 *

1,200%

British hair colour brand Knight & Wilson has seen sales rocket 1,200% since UK lockdown began on March 23**

*Google 2020 | ** Knight & Wilson



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DIY BEAUTY

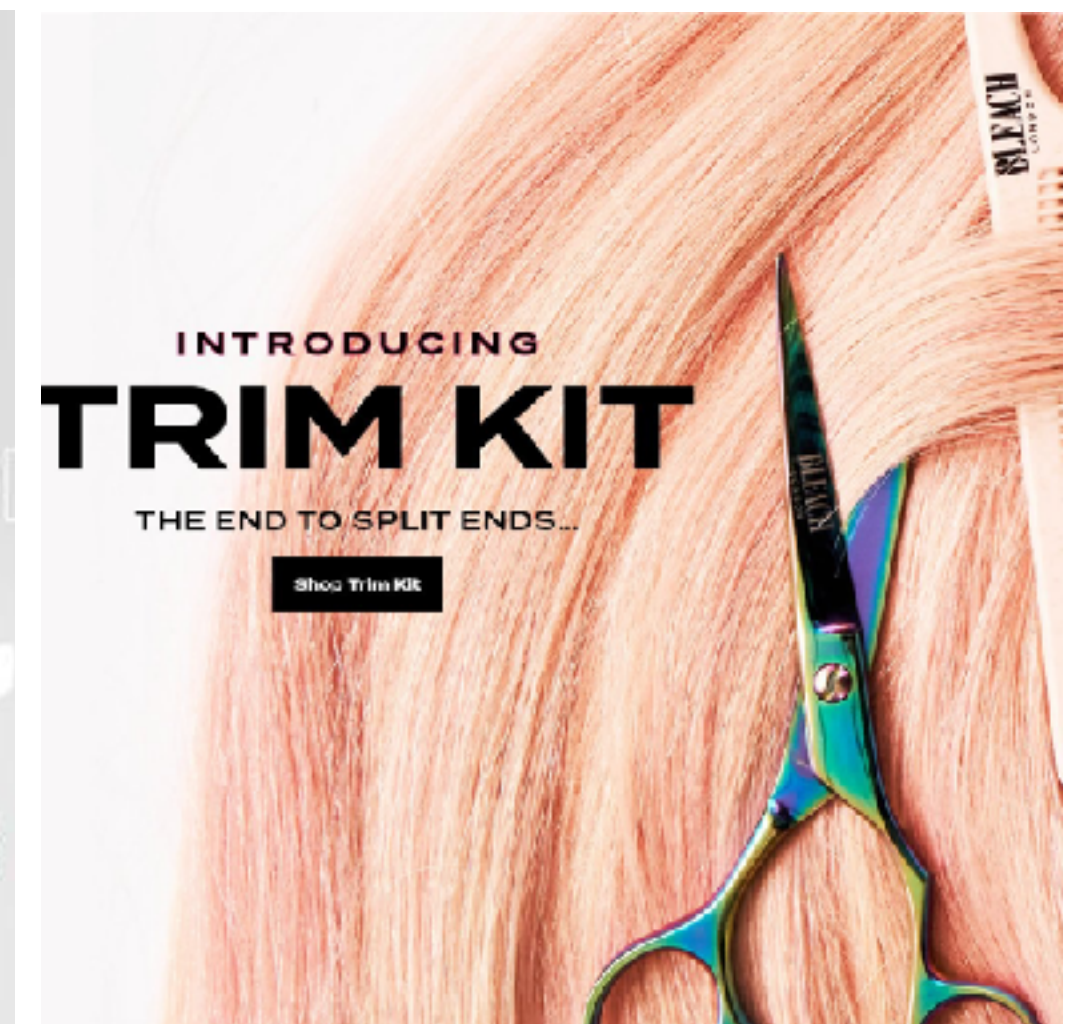
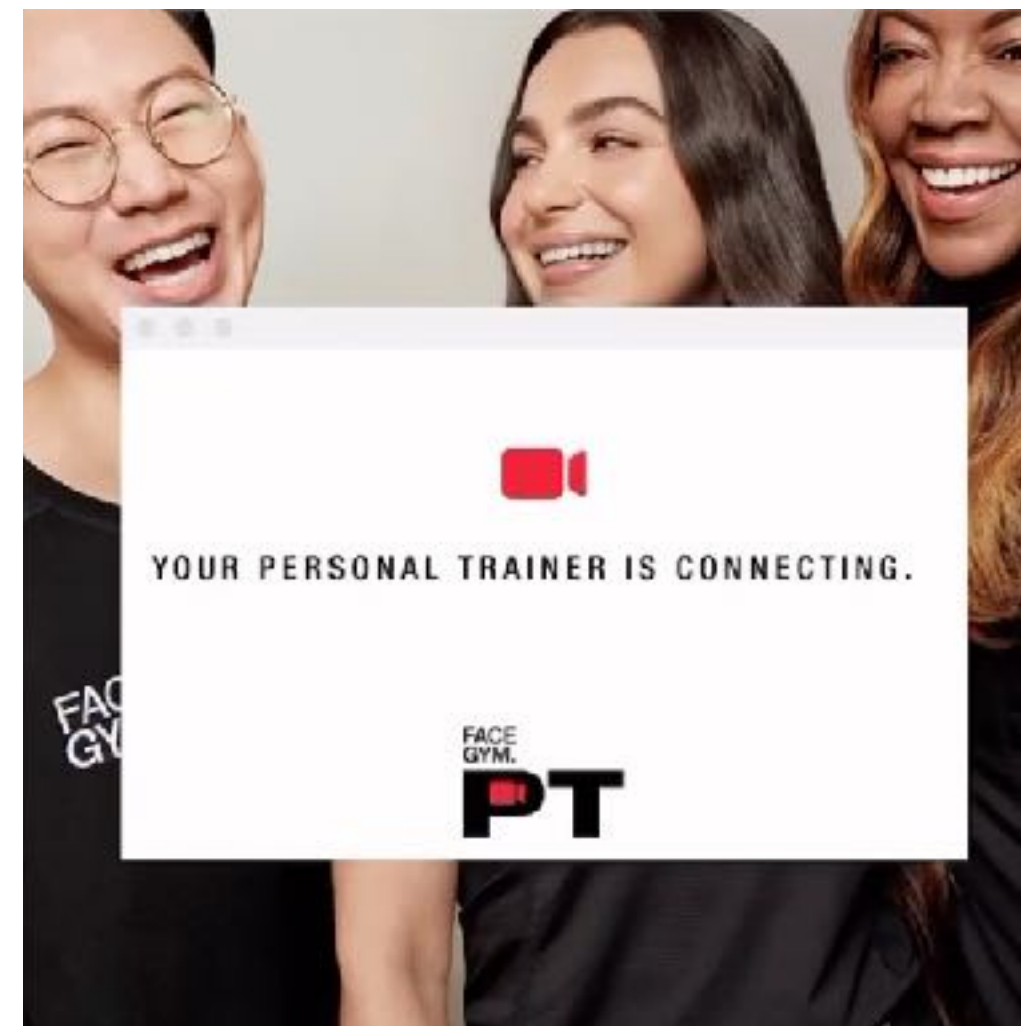
Brand Helpful

Helpful Digi Engagement: Mentions of ‘IG Live’ on Instagram and Twitter skyrocketed by 526% between March 8 and March 15 (Comperemedia, 2020), pointing to the growing need for digi-based distraction, community, and connection in lockdown. Beauty brands are turning to social video for helpful, educational content to engage consumers.

Face Gym

Instagram has been incredible for this skin fitness brand, they now offer 45-minute one-to-one and group PT sessions with its ‘face trainers’ to guide people through face sculpting regimes they can do at home, without the need to have to use or purchase its tools or products.

The team at **Bleach London** have been busy during lockdown connecting with consumers via Instagram. Founder Alex Brownsell has been hosting Bleach parties with celebrity friends, featuring Georgia May Jagger offering ‘Secret Trim’ tutorials along with direct sessions with their hair stylists.



DIY BEAUTY

Creative Colour

With consumers in lockdown and hair salons closed, the focus has turned to hair dyes and treatments, with an emphasis on at-home maintenance solutions.

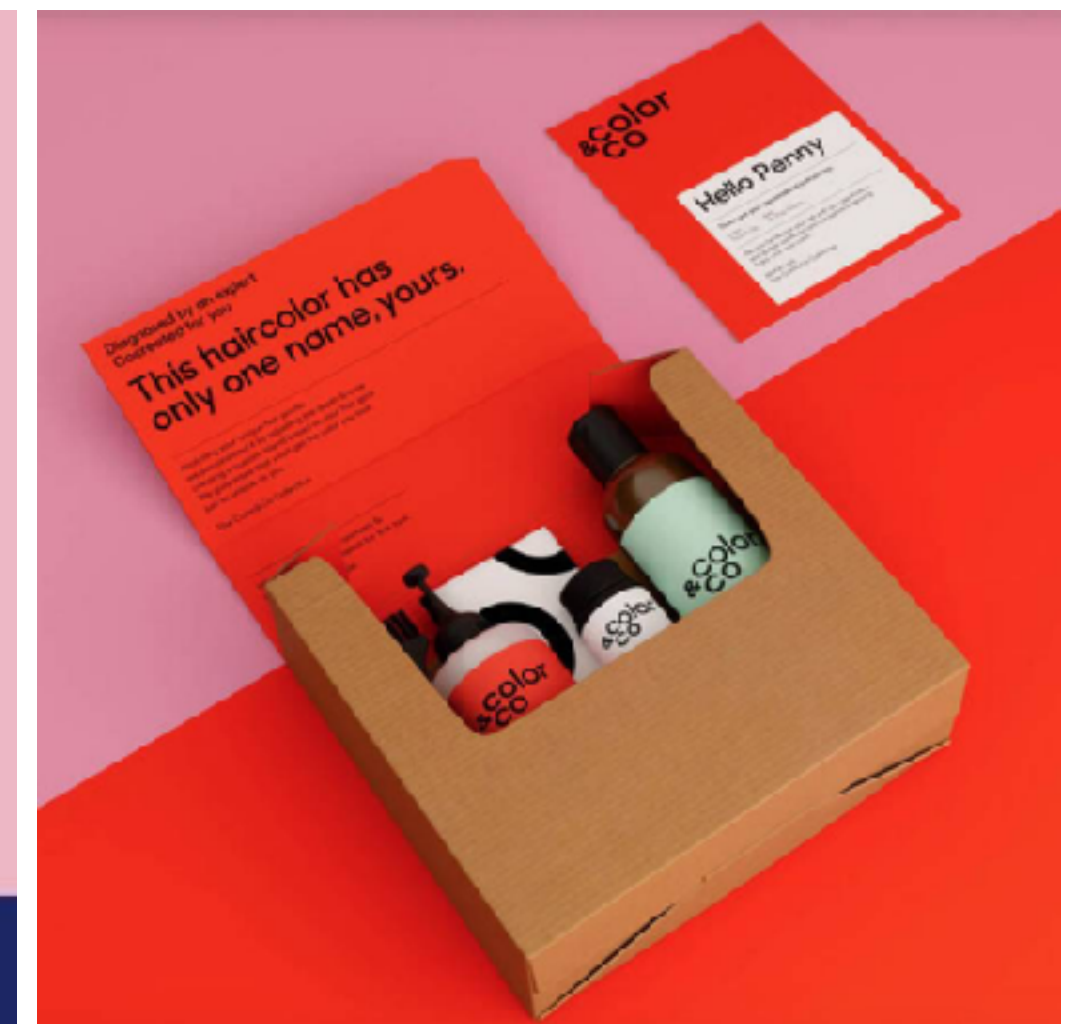
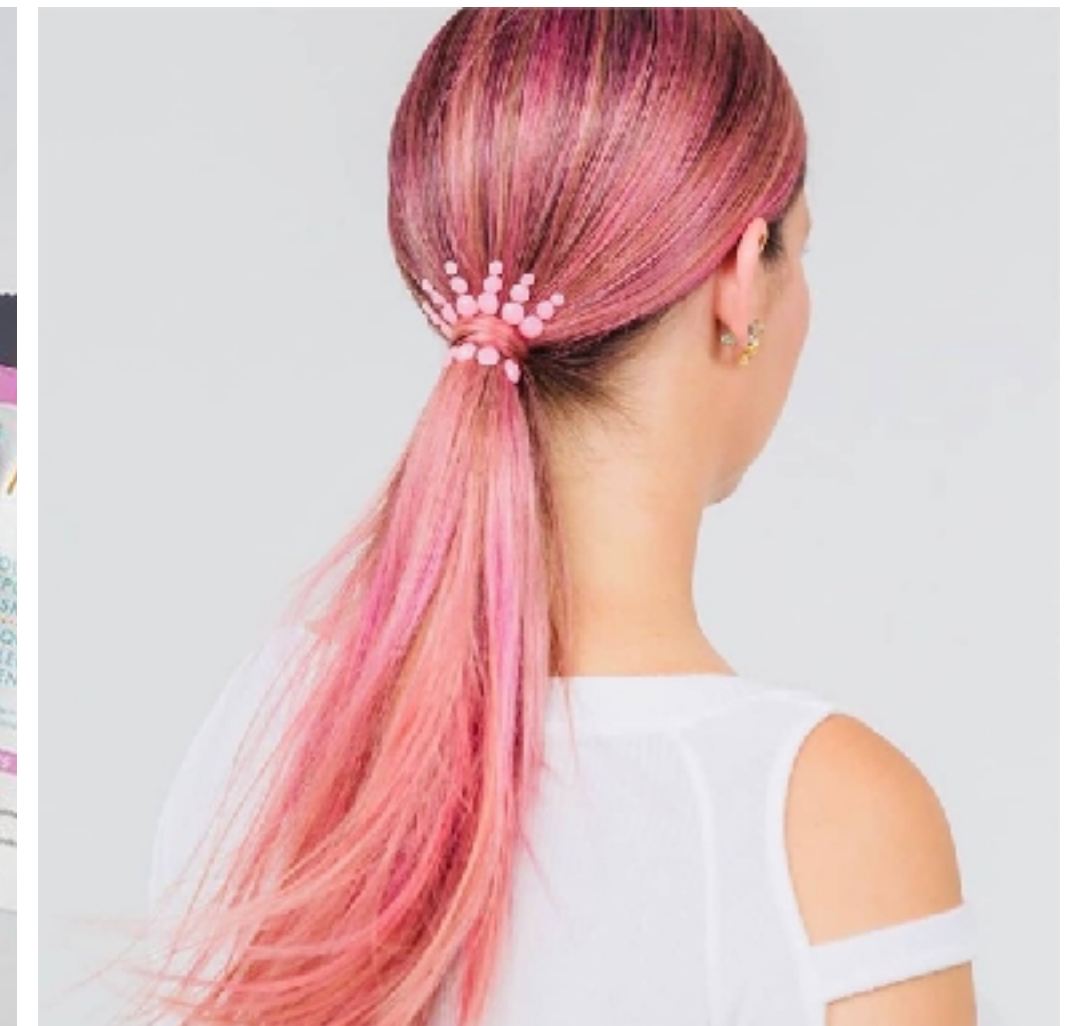
Google searches in the US for hair colouring products increased to more than 65,000 between February 16 and March 28 2020 (Spate, 2020).

Moroccan Oil - Color Depositing Masks

The brilliant thing about these masks is the fun you can have without permanently changing your hair colour. The nourishing masks deposit temporary pigment across a spectrum of natural and to more playful tones.

Color&Co

Color & Co enables you to live chat with a professional colourist, they'll suggest exactly the right solution for you. Your hair profile is analysed, base colour selected and adjusted for tone and depth. You can virtually try the shade on and once you're happy, it will be made and sent straight to you.



DIY BEAUTY

Grayceful

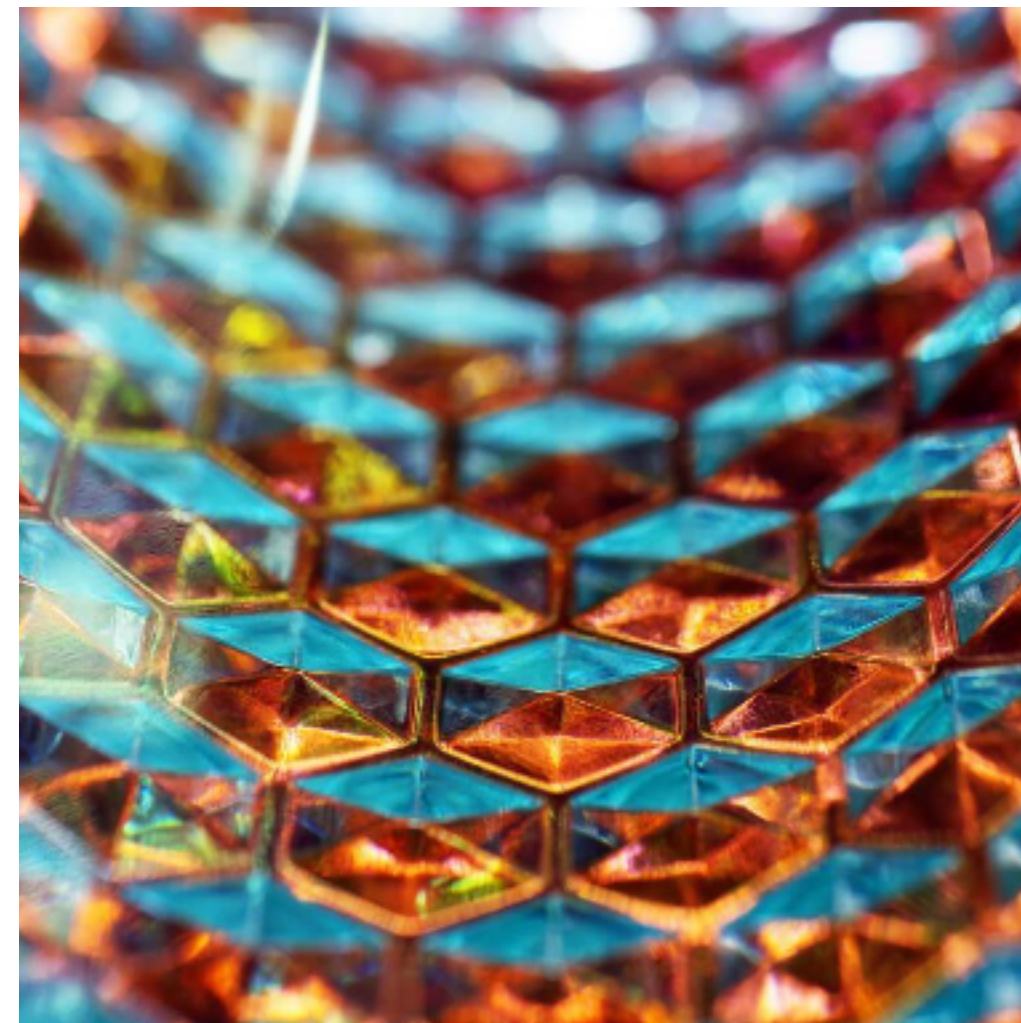
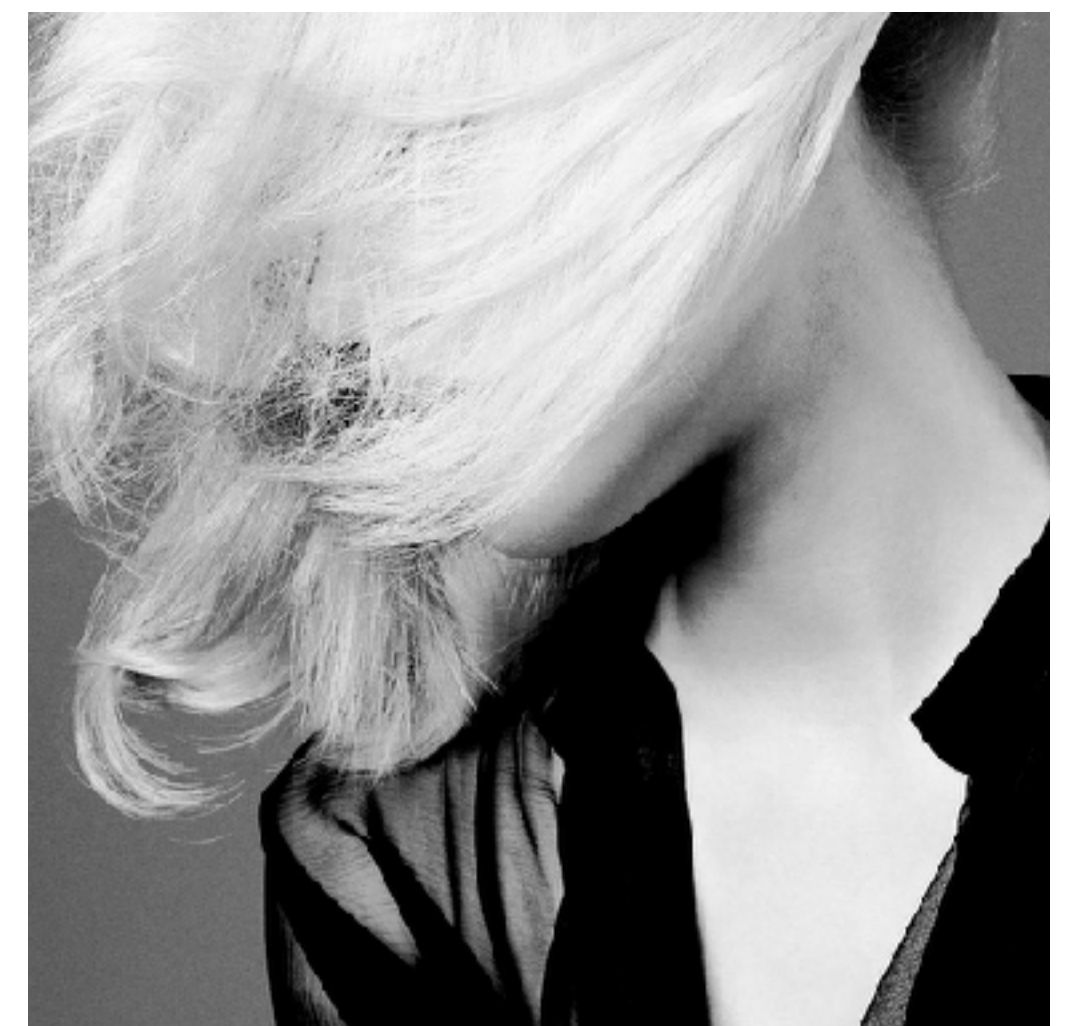
Usage of at-home colourants among British women aged 65 and over reduced from 36% in 2018 to just 27% in 2019 (Mintel, 2019). Older consumers are embracing their natural greying process, and brands innovating with product that helps them on this journey will attract a sizeable new consumer base.

Oribe's Silverati Illuminating Treatment Masque and Illuminating Pomade

Specially formulated for grey, silver and white shades. The silver pigments in the product enhance brightness, while pea peptides provide volume and anti-ageing benefits.

Davines Alchemic

Alchemic is a system of shampoos and conditioners with pure pigments that can intensify and brighten both natural and cosmetic color. This is non-permanent color that gives you free reign to experiment without worrying about long-term effects.





CONCLUSION *from*
FREE THE BIRDS

DIY BEAUTY

What does this mean for my brand?

Do you know your community?

While many start-ups may not have the scope or financial muscle to pivot their NPD pipeline, they do have a valuable opportunity to build on the relationships they have already established by offering services online. These appeal to consumers as they adjust to taking care of themselves from home, whilst giving brands who are well versed in data analysis even more precious insights into their lives, wants and behaviours. It is an opportunity that we see growing momentum and is here to stay. Is your brand there yet?

Are you taking UGC seriously?

User-generated content (UGC) has rocketed during the pandemic, due to consumer appetite for inspiration they can relate to. For brands, this content offers invaluable scope because it's possible to furnish a growing suite of touch points with varying content, fast and cheaply. A 2020 study by Australian UGC specialists Stackla revealed 79% of people are influenced by UGC when making purchasing decisions, it is six times more influential than brand-created content and 9.8 times more impactful than influencer content. Spontaneity, credibility and relatability are always going to be more compelling than 'paid for' content. What will you do to ensure your brand is talked about?

Post-Covid future beauty ...

Will need to answer new demands from consumers and what they want from beauty - how can brands prepare for this? More at-home products and services will resonate, it doesn't all have to be serious, a light-hearted approach goes a long way, whilst improved hygiene will be key for retail and salon settings. Brands will also have to answer a distinct need for comforting beauty experiences. How will your brand play in this space?

SUSTAINABILITY

WATERLESS WONDERS | LESS IS MORE | NATURAL & ETHICAL

Sustainability has become a key driver for haircare, with consumers looking for eco, natural and safety credentials above product claims. Effective multifunctional formulas will attract a wide consumer group with varying needs and desires, while environmentally friendly qualities will be engrained in all products.

Water-free formulas, strong natural and ethical brand values, and multipurpose products are contributing to sustainability in the haircare market – a growing trend set to dominate in 2020 and beyond in line with developments in other beauty categories such as skincare.

1.2tn

In the US, 1.2 trillion gallons of water are used for showering each year*

82%

The percentage of Gen Z and millennial women in the US who'd switch to a natural product if they found one with results comparable to a non-natural product*

SUSTAINABILITY

Waterless Wonders

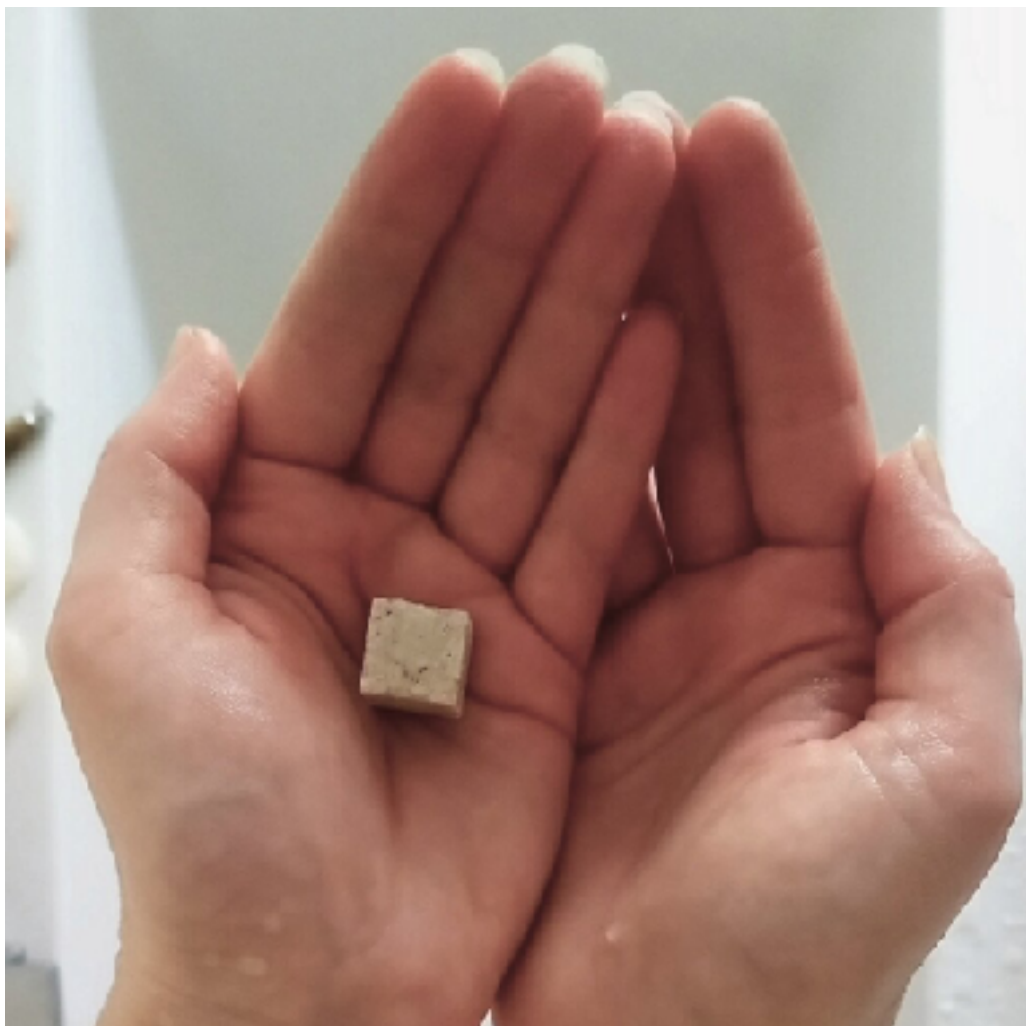
The waterless beauty market is growing, thanks to consumer demand for more water-saving options. Typical liquid haircare products, with their high water content, are big eco offenders – and shrewd brands are showing how going waterless is one of the most sustainable moves to be made.

Beauty Kubes

UK based Beauty Kubes are also water activated, simply crush between damp palms, add water and apply. They offer a range of products, neatly packed into space efficient cube packaging.

HiBar

A salon standard shampoo and conditioner in bar format that’s converting even the pro stylists. There are three variants to choose from; maintain, moisturise and volumize, depending on your specific hair care needs.



SUSTAINABILITY

Waterless Wonders

Consumer demand for sustainability can no longer be ignored and with it they are searching out brands that not only do better but also deliver a great ‘in-use’ experience.

These are both examples of powder that you activate with water at home which saves on the carbon footprint and stops the need to ship water.

Forgo

Forgo from Sweden is the powder based sustainable alternative to liquid soap with fragrances distilled from citrus farm left overs. Paper packaging and a ‘bottle for life’ refill are the supplied formats.

Owa’s powder-to-foam shampoo is simple to use and travel friendly. One hair wash bottle equals four bottles of liquid shampoo. You can choose from scented or un-scented plus travel size packaging.



SUSTAINABILITY

Less is more

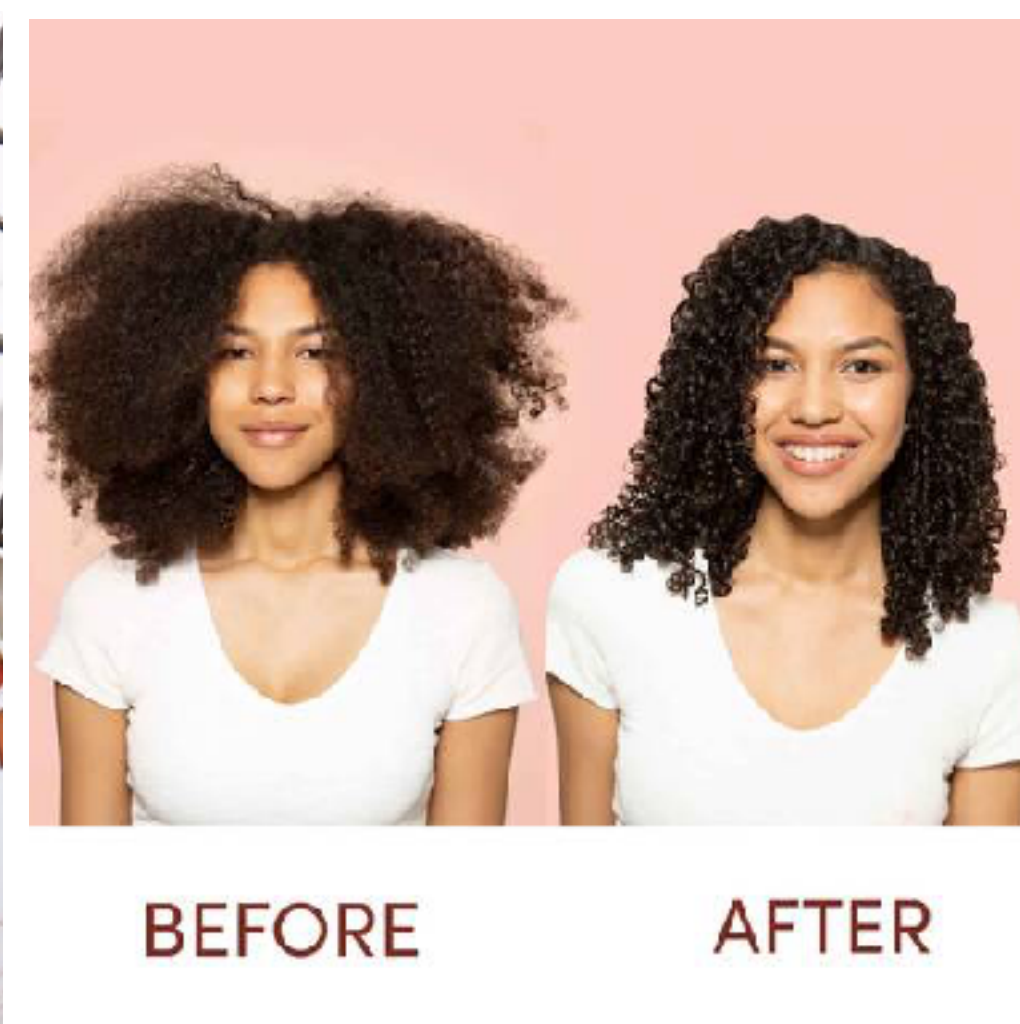
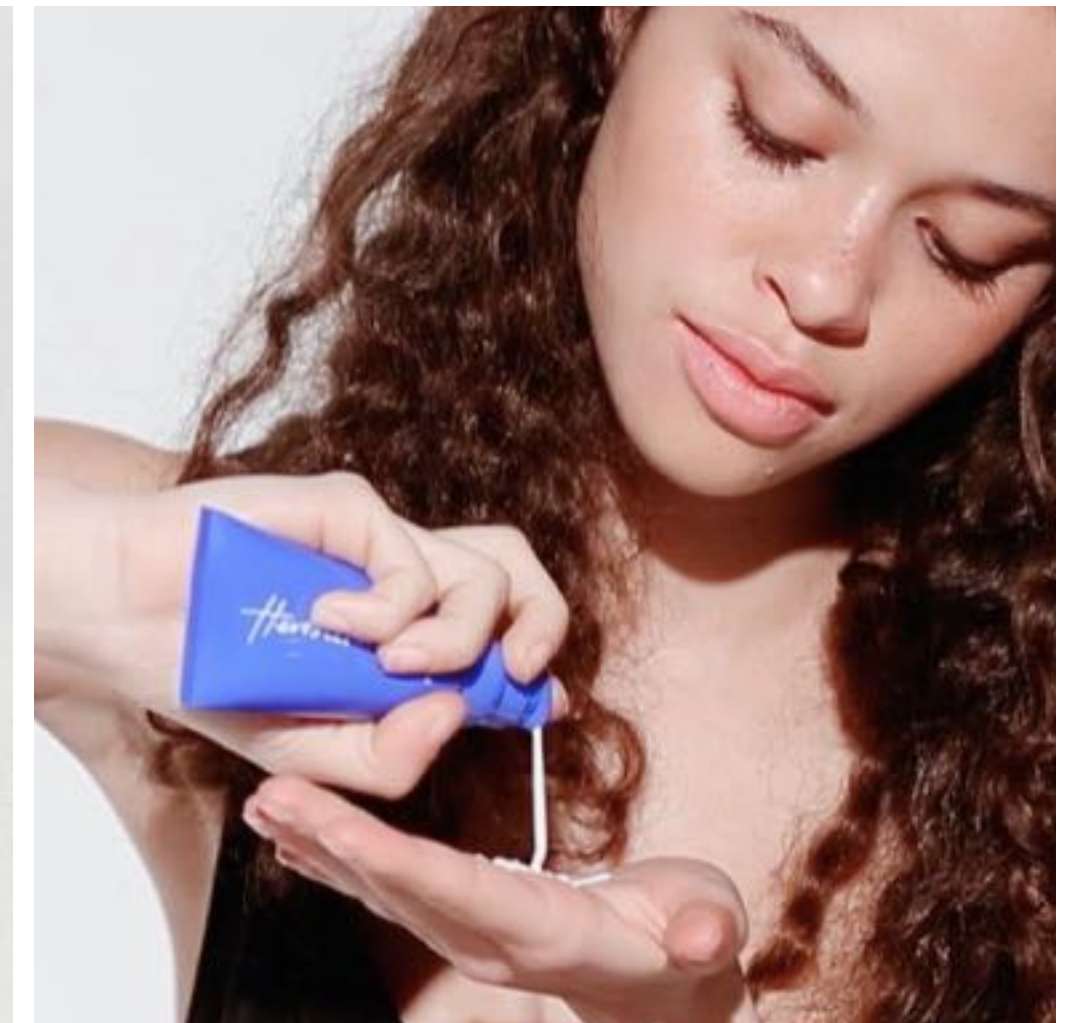
Multifunctionality is now a big buzzword in the sustainability space as consumers opt to buy fewer, but harder-working products.

In haircare, this means combining multiple functions into one all-encompassing product with a sophisticated formula.

Hersheson's Almost Everything

A great example is British salon brand Hershesons' Almost Everything Cream, which claims to be a one-size-fits-all styling product to streamline routines. It acts as a primer, shine booster, frizz fighter, texturiser, tamer, curl definer, conditioner and mask.

Mizani 25 Miracle Cream is a universal leave in product for textured hair offers 25 moisturising, styling and beautifying benefits in one tube.



SUSTAINABILITY

Natural & Ethical

Odele

Salon grade haircare priced for all that share your shower. Premium, practical and safe for everyone. Clean by European standards, amaranth and rice tein are the star ingredients delivering nourishment, shine, manageability and strength.



Azure Planet Friendly Beauty

A range of haircare products ‘that look and smell fantastic but are gentle on person and planet.’ The bottles are made from sugar cane which is carbon negative, instead of releasing carbon, every ton of sugarcane plastic produced captures 3.09 tons of CO2 from the environment.





CONCLUSION *from*
FREE THE BIRDS

SUSTAINABILITY

What does this mean for my brand?

Are you the best you can be?

The ship is sailing with brands that do good, causing less harm to people and planet. Are you onboard? Even if you're not yet, be honest and let consumers know about your intentions. Stating that you're moving towards a more sustainable future by '2025' is ok too. Just have a plan, a voice and an opinion. No excuses for keeping your head stuck in the sand, you will be found out and it'll harm your bottom line.

If not, seek help!

The world of sustainability is complex and multi-faceted. New innovations in both packaging and formats are launched all the time plus regulations are constantly evolving. Staying ahead can be challenging. We attend a huge amount of talks and are regularly invited to participate in debates on this ever growing and crucial subject. Get in touch and we'll inform you too, not just in the dos and don'ts but also in how you can communicate your perspective to your audience.

But do it *your* way

Whilst sustainability is finally gaining the momentum it deserves make sure you stand out from the crowd. Many claims i.e. 'vegan,' 'clean' and 'cruelty-free' have become the basic hygiene factors for many haircare brands. What else are you doing to differentiate your position and more importantly, what's right for your brand proposition? Do you need to take more fundamental steps and join the 21st century consumer demand for increased sustainability in the haircare market?

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SKINIFICATION

SUPER SERUMS | BEAUTY BOOSTERS | SCALP HEALTH

With skincare's bold new innovation in ingredient and formula development, it's no wonder haircare brands are still looking to this booming market for inspiration. Trending formats such as **serums** and **boosters** are diversifying hair products, while targeted **scalp care** contributes a sizeable chunk of exciting new launches for 2020.

54%

The percentage of Brazilian consumers worried about the health of their scalp*

**Stylus: 2020 Hair Projections*

53.9%

On average 'hair serum' was searched for 40,900 times in the US every month and has seen interest grow more than 53.9% since 2019*

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SKINIFICATION

Super Serums

Nuele

Natural and organic Nuele, launched early this year offering a light, multi-action serum, bringing manageability, protection from heat and hydrating benefits to hair. The natural and organic formula features a sophisticated blend of jojoba, argan, moringa, rosemary oil and clary sage, which contribute to boosted hair manageability. Hair is moisturised while also protected from heat styling.



Fitish

Fitish Hair Plumping Serum hails CBD as its miracle ingredient, claiming to strengthen follicles, thicken roots and detangle strands, the brand design cues are closer to what you would expect from a cosmetic foundation.



SKINIFICATION

Beauty Boosters

The Inkey List

Famed for its hard working straightforward product range, The Inkey List have just launched eight new products to be used as add-ins to established haircare routines. Each features hero ingredients you'd expect to see within skincare and offer benefits such as hydration, anti-frizz and grey hair reduction from the follicle.



Label M Snap Shots

In late 2019, international professional haircare brand Label.m launched a series of in-salon treatment 'shots', called Snapshots, which can be used alongside shampoo to add volume, soothe the scalp, control damage, or revive colour.



SKINIFICATION

Scalp Health

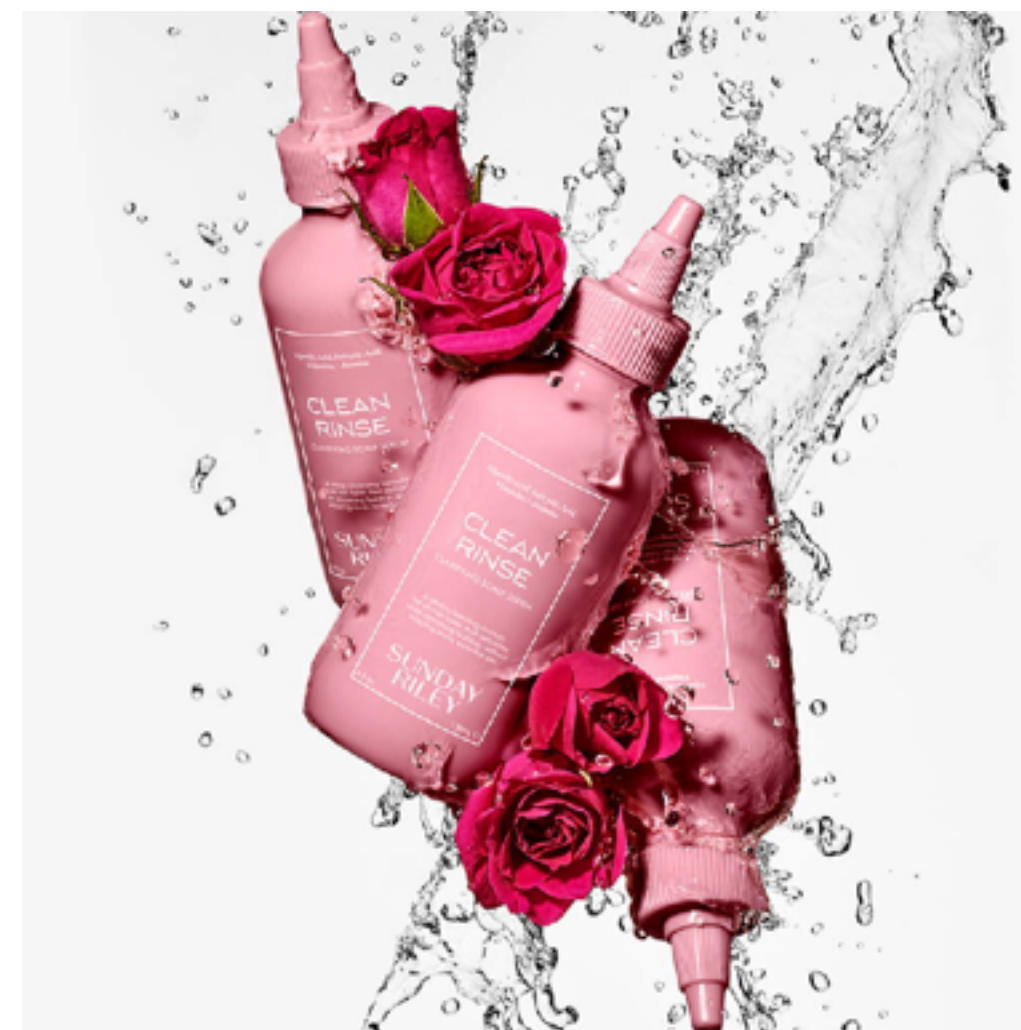
A natural progression and intuitive shift from skincare to scalp and haircare.

Drunk Elephant

"I developed my hair line to apply my unique skincare philosophy to the scalp — because the scalp is skin, too," said Tiffany Masterson, founder of cult US skincare brand Drunk Elephant, which launched into haircare in 2020. The T.L.C. Happi Scalp Scrub features an AHA and BHA acid blend to break down and dissolve dead skin cells as well as styling product build-up.

Sunday Riley

US skincare brand Sunday Riley also launched into haircare with a Clean Rinse scalp serum featuring glycolic and salicylic acids to exfoliate and dissolve sebum plus rose clay to remove impurities.



SKINIFICATION

Scalp Health

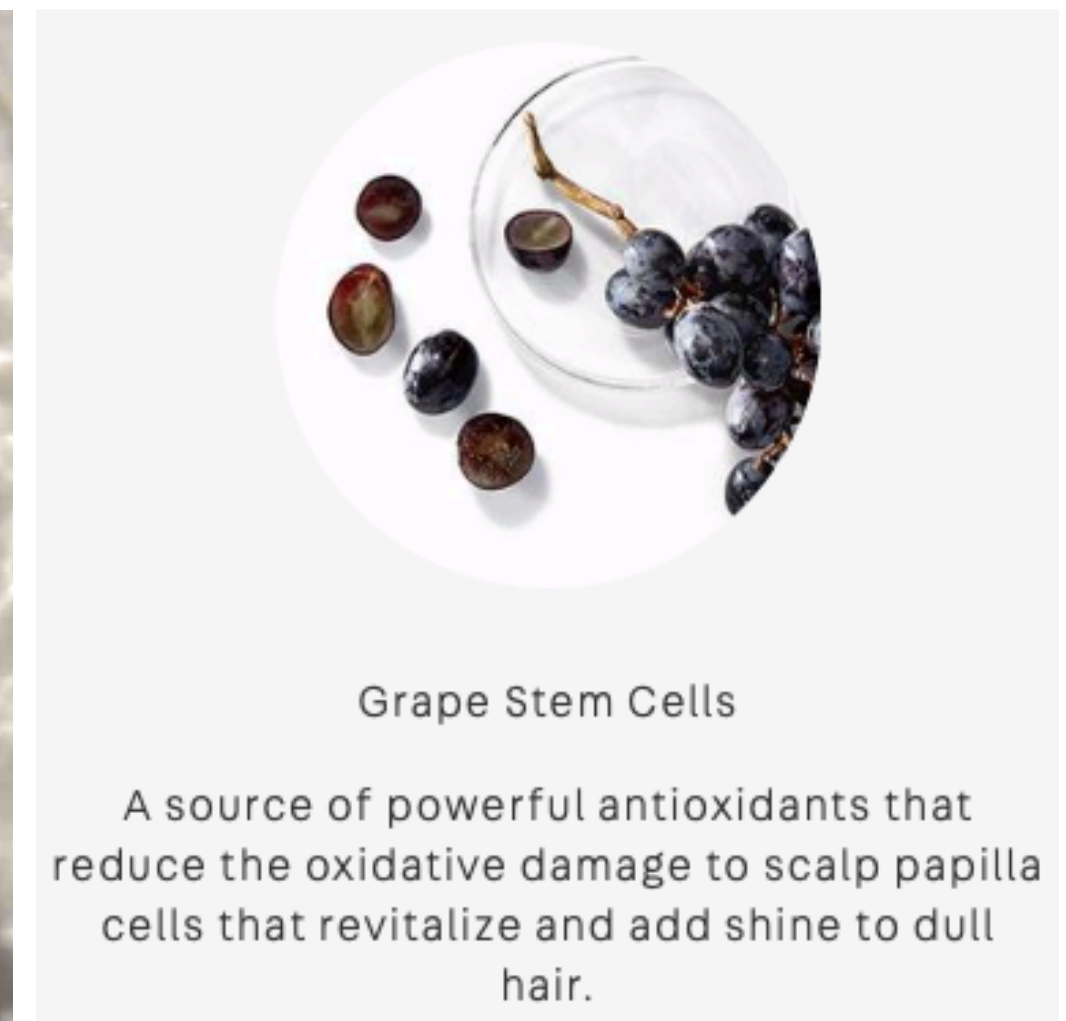
TPH by Taraji

Promoting great hair by optimising scalp health, the cooling & energising Ultra Chill Scalp Serum sounds particularly appealing. The tri-tip applicator gets under braids, weave installs and dense hair to deliver calming, refreshing, relief directly to your scalp, no rinsing required.



Perfect Shine

NatureLab Tokyo has made headway in botanical technology for haircare by sourcing the most potent plants, isolating and concentrating their active nutrient-rich stem cells, and infusing them into a clean, performance-driven formulas. This scalp scrub exfoliates with sugar crystals and probiotic sake water.



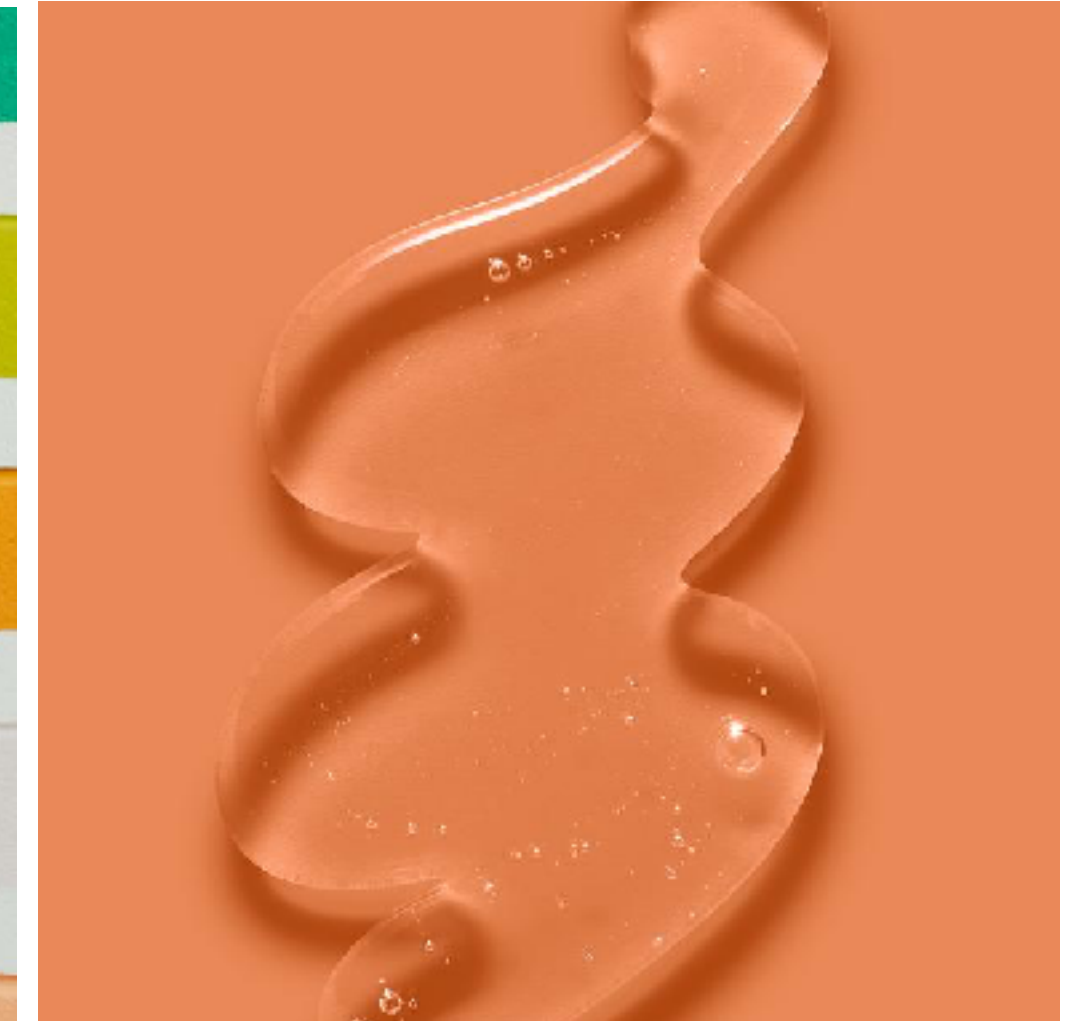
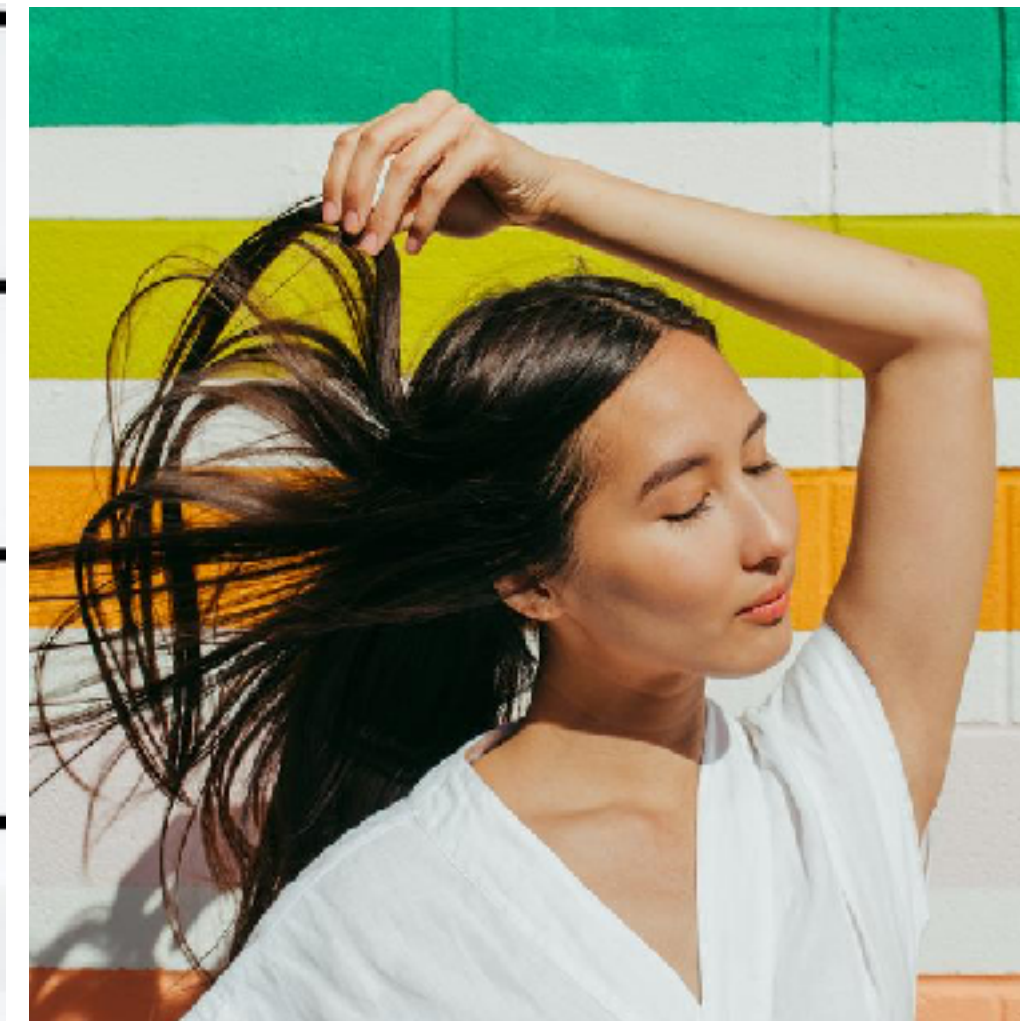
Grape Stem Cells

A source of powerful antioxidants that reduce the oxidative damage to scalp papilla cells that revitalize and add shine to dull hair.

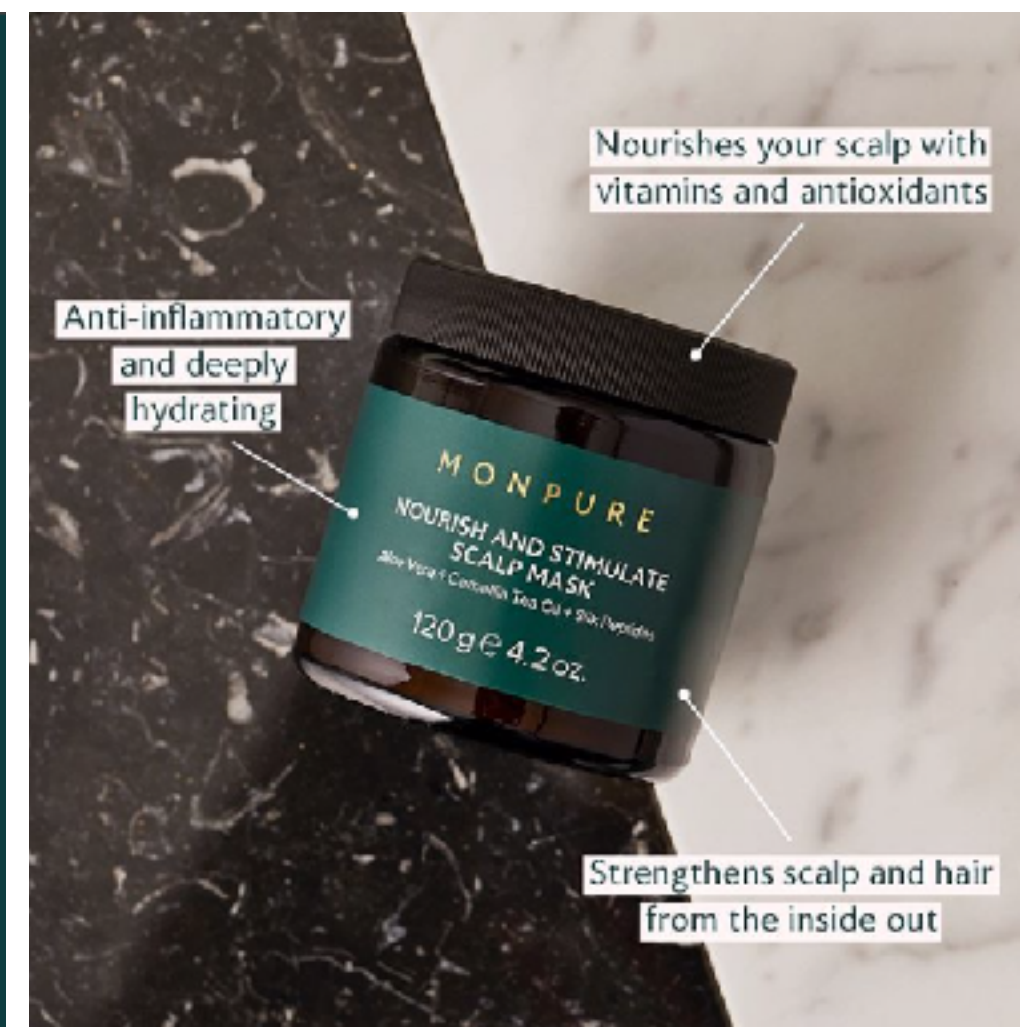
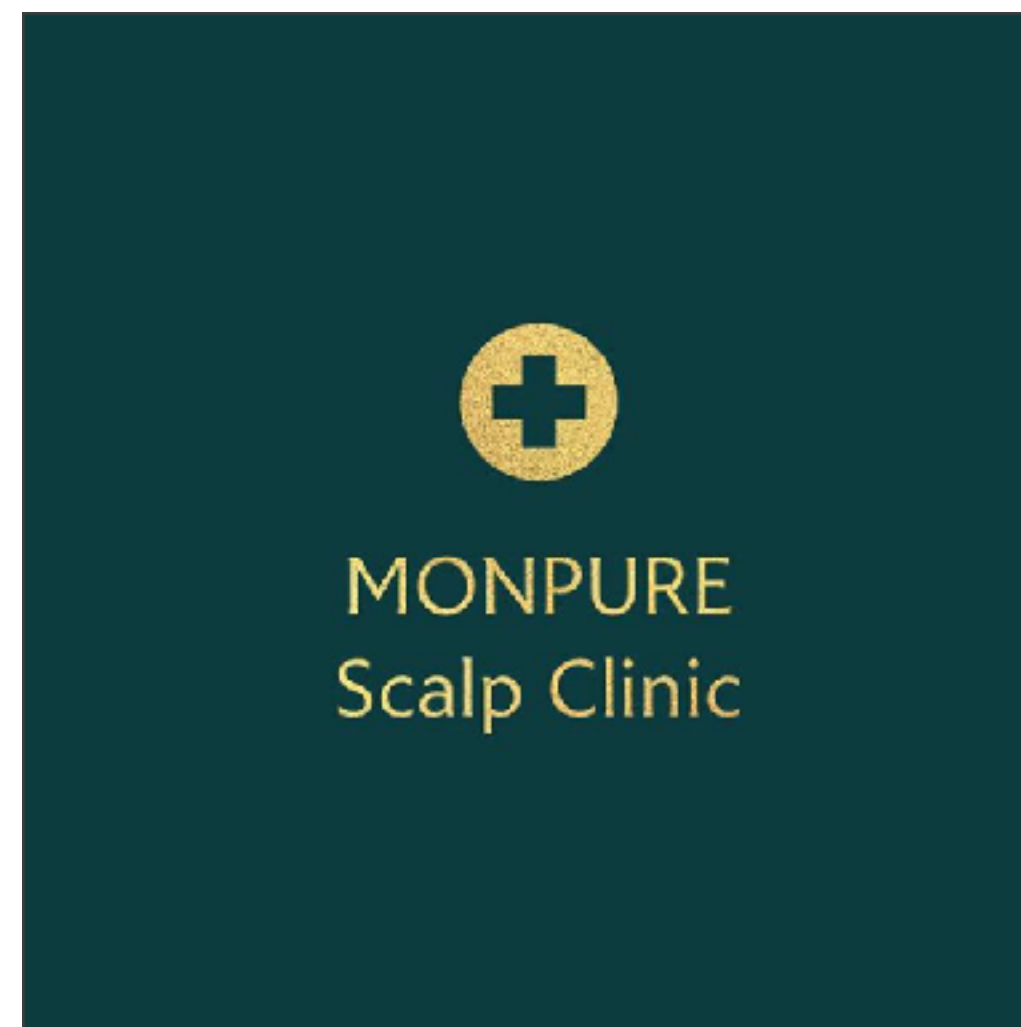
SKINIFICATION

Scalp Health

Verb In the same way we might detox our bodies after a period of indulgence, Verb is a 3-step reset regime for hair and scalp to restore it back to its optimal balanced state by clarifying the scalp and repairing damaged or overworked hair.



Monpure believe that the scalp is the unsung hero of healthy hair and have a resident dermatologist Dr. Sue Ann Chan to offer guidance. Everything in the range stars nourishing botanicals and potent actives sustainably sourced from all over Europe. Redness-reducing witch hazel, dead skin-dissolving salicylic acid and restorative silk peptides are just a few of the ‘hero’ ingredients.





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CONCLUSION *from*
FREE THE BIRDS

SKINIFICATION

What does this mean for my brand?

Lead through education

In the grand beauty innovation timeline, awareness of scalp-health is a relatively new perspective. Your brand is in the perfect position to educate and deliver a point of view that helps, inspires and trains your audience, after all a healthy scalp equals happy hair and a happier loyal customer.

Spring clean the portfolio

By transferring established skincare regimes to enhance how you look after your hair lends the opportunity to undertake a portfolio review - are areas of your collection out of step with the new trends? Is now the time to introduce new ingredients such as pre/probiotics or targeted treatment shots to elevate your brand away from the competition and further support your proposition?

So, what next?

Forget when Harry met Sally. Beauty meets Hair is where it's at. The examples shared are where beauty regimes, serums, boosters and solutions to issues and packaging structures migrate from the face to the hair. We know that traditionally face to hair is the acceptable transition but why not the other way around? Are there gems in your brand portfolio that could stretch and adapt to hair styling, body care or even facial skin care?

CONCLUSION

AT A GLANCE

DIY BEAUTY

Do you know your community?

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FREE THE BIRDS

Here to help

We hope you found our gathering of insights and opportunities helpful. Please get in touch with us to arrange a time to discuss how we can elevate your brand.

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