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# COMING CLEAN

WHAT CONSUMERS REALLY THINK  
ABOUT HAIRCARE PRODUCTS  
POWERED BY SEARCH INTELLIGENCE

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# EXECUTIVE SUMMARY

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The global haircare market is expected to reach **\$221.1 billion** by 2025 (Grand View Research, 2018), which poses a massive opportunity for haircare brands looking to fuel further growth in specific product categories and lead the market.

The recipe for success has evolved as brands and consumers switch roles, with consumers becoming the driving force behind new trends and growth in the industry. A major challenge for brands is the disparity between consumer preferences, with many demanding product innovation coupled with personalisation to address individual beauty concerns. There's also been a shift towards more natural ingredients as consumers look to prolong the long-term health of their hair and become more conscious of their impact on the environment. With this in mind, how can haircare brands successfully predict the behaviour of ever-changing consumers and stay ahead of competitors?

As the global leader in Search Intelligence, Captify powers business, marketing and media decisions for over 700 global brands through the most honest data set in advertising—search. Through analysis of over 491 million haircare searches from Captify's global network, this report will unlock the truth behind macro world trends, competitor and brand intelligence, consumer interests, real-life moments and red-hot intent signals. In particular, digging into macro trends driving change in the haircare industry, unique hidden audiences that brands could be targeting and key trigger moments throughout the year that consumers are experiencing and planning for.

The aim of this global report is to reveal actionable insights around haircare to power future planning, creative activation and measurement for brands.

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# MARKET TRENDS



# “SHOPPERS HAVE BECOME MORE INGREDIENT SAVVY”

VICTORIA HALL, FORMER BEAUTY EDITOR AT HARPER'S BAZAAR

Whether it's investigating the new wonder product that will enhance grey hair or how to fight frizz on holiday, Victoria Hall is in the 'know' about haircare. Among advising readers as the Beauty Editor at Harper's Bazaar and the Telegraph, she's also freelanced for luxury brand, Crème de la Mer, and publishers; Grazia, Fabulous Magazine and The Sunday Times Style.

The question that all brands want to know...what do consumers really want?

With the sheer volume of haircare products on the shelf, it's no surprise that it's difficult for consumers to choose the 'right' product. There has been a noticeable shift in consumers purchase behaviour; *“shoppers have become more ingredient savvy - they want their shampoo to actually clean their hair, rather than just moisturise or volumize”*. Chemicals and plastic are now perceived as nasties in modern haircare, with consumers being more aware than ever of what's actually in the bottle.

The haircare industry thrives on new trends, with many of these now born on social media. Whilst many brands

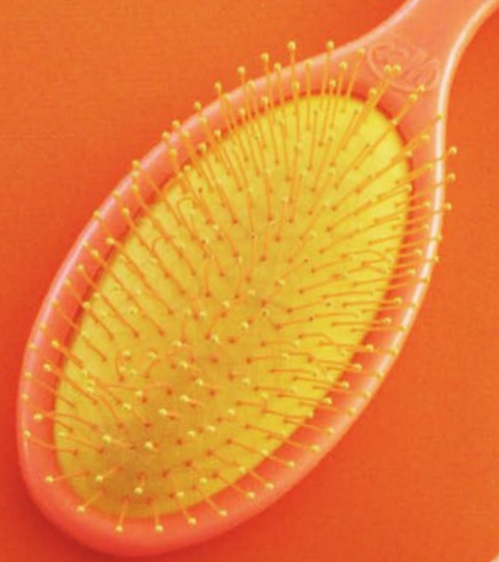
jump on these fads, recent trends such as the 'skinification' of haircare are focused on the long-term health of hair. Scalp health is a concern for many, with the fear of hair follicles being clogged with heavy ingredients and nasties that could inhibit new growth. In anticipation, brands have been hybridising skincare technology and haircare. Whether it's micellar shampoo to purify hair or overnight serums to

repair and protect...it's all about connecting haircare and skincare routines. As a result, there's been an increased investment in luxury conditioners and at-home treatments. Hall states that the role of haircare is evolving, *“in comparison to ten years ago, women are starting to see haircare as an extension of their beauty routine”*.

*“In comparison to ten years ago, women are starting to see haircare as an extension of their beauty routine”*

For a long time, the beauty, fragrance and haircare industry have relied heavily on gender-specific product marketing. However, gender-neutral products are about to steal the limelight, fuelled by the disappearance of stereotypes and a growing demand for brands to promote equality. The likes of Mr Smith, Malin & Goetz and Løre Originals have targeted the 'genderless generation', providing unisex products with neutral packaging that appeal to all audiences.









This year, it's been evident that bigger brands are struggling to react to changes in consumer behaviour, while new at-home colour brands have been innovating in the professional haircare market. *"With increasingly hectic lifestyles, consumers are looking for quick and convenient at-home solutions that save them time and money"* Hall says. Brands such as eSalon use algorithms to power insights on your perfect shade, delivering custom hair colour kits straight to your door. Bleach London and Josh Wood offer at-home colour shots to boost hair colour in between appointments.

In the past year in particular, niche 'disruptor' brands have been taking on the big dogs, with many proving successful. The likes of IGK offer premium 'Instagrammable' packaging coupled with affordable prices, appealing to an 'influencer' generation looking to share beauty and haircare moments with their followers. The founder of disruptor brand, OUAÏ, used her vast social media following to understand what consumers actually want from their haircare, which ultimately powered the product strategy of the brand.





Eco-brand, Beauty Kubes, responded to an emerging trend in a truly unique way—providing organic, vegan friendly and plastic free shampoo cubes to satisfy an eco-friendlier generation. Hall explains:

*“Disruptors are bringing something unique to hair care in the way that they communicate with their customers. They identify and own their niche, the rest of the range flows directly from that. Disruptors are cutting into big brands' profits”*

Looking ahead, it's all about the long-term health of hair; consumers will alter their eating habits and supplements around their hair type and what problems they experience. New technology will undoubtedly impact the haircare market, whether its drugs that can reverse hair loss or being able to achieve the ultimate salon quality colour at home.

In the new era of the disruptor, brands champion consumers to drive their products. Communication and ingredient transparency is paramount. One thing is clear, the recipe for success has changed.



# TOP 100 SEARCHED HAIRCARE BRANDS

DISRUPTORS HAVE BEEN SHAKING UP THE COMPETITIVE LANDSCAPE OVER THE PAST YEAR, FORCING BIG BRANDS TO RETHINK THEIR POSITIONING STRATEGIES. THIS INDEX REVEALS THE SHARE OF VOICE OF THE TOP 100 HAIRCARE BRANDS. FEAR NOT... 9 OF THE TOP 10 BRANDS ARE ESTABLISHED.

## KILLER INSIGHTS

+ Disruptor hair growth brand, **WATERMANS** dominated search volume with **8.6%**

+ Many haircare brands that tackle problems such as dandruff and hair loss indexed in the top 100

- |   |   |  |
|---|---|--|
| 01  WATERMANS                        | 02  head & shoulders                 | 03 L'ORÉAL   |
| 11  Johnson's                       | 12  Timotei                          | 13 TRESemmé  |
| 21  OGX                             | 22  NATUR VITAL                      | 23  REVLON PROFESSIONAL                       |
| 31  AVEDA                           | 32  Plantur 39                       | 33  PAUL MITCHELL PROFESSIONAL SALON PRODUCTS |
| 41  GOLDWELL PROFESSIONAL HAIRCARE | 42  Aveeno ACTIVE NATURALS          | 43  WAHL PROFESSIONAL                        |
| 51  KORRES                        | 52  Mane 'n Tail                   | 53  KEVIN.MURPHY                            |
| 61  BOTANICALS FRESH CARE         | 62  HASK                           | 63  MACADAMIA PROFESSIONAL                  |
| 71  amika: love your hair         | 72  GREEN PEOPLE Organic Lifestyle | 73  ghd                                     |
| 81  OUAI HAIRCARE                 | 82  PHILIP B.                      | 83  NOUGHTY 97% NATURAL                     |
| 91  BIOSILK                       | 92  COWSHED                        | 93  KMS                                     |



- 04 PANTENE PRO-V 05 AUSSIE 06 TIGI 07 Herbal Essences 08 JOHN FRIEDA LONDON PARIS NEW YORK 09 GARNIER 10 WELLA
- 14 Dove 15 Clairol 16 V05 17 Batiste 18 Schwarzkopf PROFESSIONAL 19 Alpecin 20 REDKEN
- 24 KÉRASTASE 25 PALMER'S 26 FUDGE PROFESSIONAL 27 vosene 28 Simple 29 CW CHARLES WORTHINGTON LONDON 30 OLAPLEX
- 34 TONI&GUY 35 alberto balsam 36 Nizoral 37 MOROCCANOIL M 38 PUREOLOGY serious colour care 39 TREVORSORBIE 40 avines
- 44 VS SASSOON 45 Neutrogena 46 JUST FOR MEN 47 ALPHOSYL 48 PHYTO 49 ★ sexyhair 50 label.m PROFESSIONAL HAIRCARE
- 54 PRO:VOKE PROFESSIONAL HAIR CARE 55 got2b 56 NEXXUS 57 lee stafford 58 JTB 59 Klorane 60 SYSTEM PROFESSIONAL
- 64 Living proof. 65 fanola made in italy 66 ORIBE 67 MIXED CHICKS a multicultural revolution 68 cantu 69 PHILIP KINGSLEY LONDON 70 BLEACH LONDON
- 74 KIND NATURED 75 Kebelo 76 NANOGEN 77 AMERICAN CREW 78 Mark Hill 79 GLAMORISER LONDON 80 NATURA SIBERICA COSMETICS OF WILD HERBS AND FLOWERS
- 84 COLAB 85 Bb. Bumble and bumble. 86 Nourkrin 87 BALMAIN HAIR 88 hairburst vitamins for hair growth 89 shu uemura tokyo paris new york 90 Umberto Gianni
- 94 REMINGTON 95 Knight & Wilson 96 Maui MOISTURE 97 Aēsop 98 COLORWOW 99 GROW GORGEOUS 100 SACHAJUAN

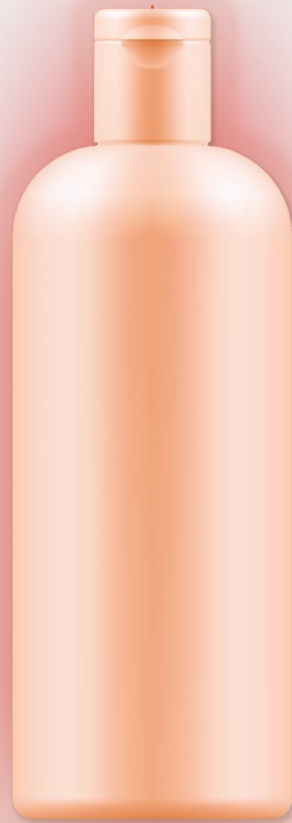


# BATHROOM SHELFIE

CONSUMERS SPEND A STAGGERING £47,000 (ON AVERAGE) ON THEIR HAIRCARE OVER A LIFETIME (MARIE CLAIRE, 2017). WITH HUNDREDS OF PRODUCTS ON THE MARKET, IT'S NO SURPRISE THAT BRANDS ARE CONSTANTLY FIGHTING FOR SHELF SPACE.

It is estimated that by 2019, the hair conditioner market will reach over **\$14 billion** (Digital Journal, 2018). Alex Fisher, Senior Beauty Analyst at Mintel states, "growth in the women's haircare market has been driven by a continued focus on caring needs, especially driven by conditioning treatments." (Mintel, 2018).

PRODUCT SEARCH VOLUME (%)



CONDITIONER  
**37.0%**



SHAMPOO  
**22.2%**



ELECTRICALS  
**17.3%**

# KILLER INSIGHTS

TOP 10 MOST SEARCHED FOR CONDITIONER BRANDS:

- |                 |                     |
|-----------------|---------------------|
| 01 JOHN FRIEDA. | 06 BED HEAD         |
| 02 AUSSIE       | 07 TIGI             |
| 03 PANTENE      | 08 L'ORÉAL          |
| 04 Clairol      | 09 head & shoulders |
| 05 TRESemmé     | 10 WELLA            |

When looking at products that consumers use in their everyday haircare routine, Search identifies the categories that brands should champion in their marketing strategy. Conditioner accounts for 37% of searches around haircare, making it the most important product when researching.



ACCESSORIES  
**9.2%**



DYE  
**6.4%**



STYLING  
**5.5%**



TREATMENTS  
**2.4%**

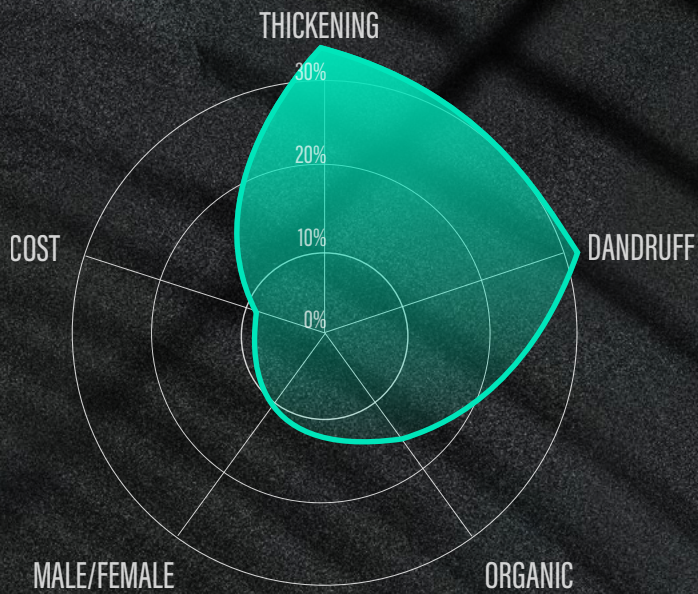


# BEYOND THE BOTTLE

IT'S NO LONGER ALL ABOUT 'WASH-AND-GO', WITH CONSUMERS INCREASINGLY FOCUSED ON PRODUCTS THAT WILL BENEFIT THE LONG-TERM HEALTH OF THEIR HAIR. SEARCHES AROUND PRODUCTS REVEAL CONSUMERS' INNERMOST HAIRCARE NEEDS AND INTENT FOR PURCHASE.

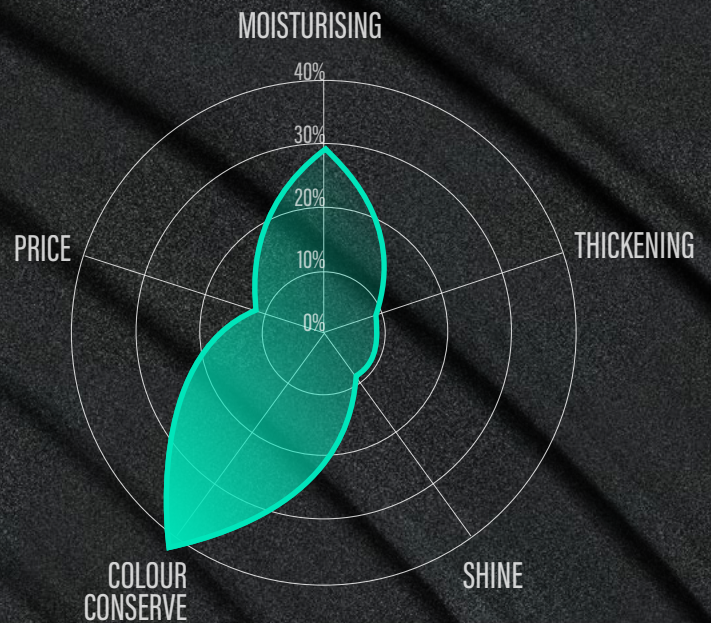


## PRODUCT ATTRIBUTES



### SHAMPOO

**Thickening** and **dandruff** are the top two attributes that consumers look for in shampoo, suggesting that they search by problem or hair type. Consumers are also searching around organic haircare products, reflecting that they're conscious about ingredients. They were less concerned regarding price or gender as attributes.



### CONDITIONER

Attributes that you might expect consumers to be searching for around conditioner, such as damage repair, indexed very low. **Moisturising** and **thickening** are the top two attributes that consumers seek in their conditioning products. Much like shampoo, price under indexed, suggesting that consumers aren't focused on cost.

## KILLER INSIGHTS

- + Users are **75x** MORE likely to be searching for **MOISTURISING** over any other attribute when searching for conditioner
- + **17.7%** of consumers search for **THICKENING SHAMPOO**
- + **11.1%** of consumers are searching for **CAFFEINE SHAMPOO**



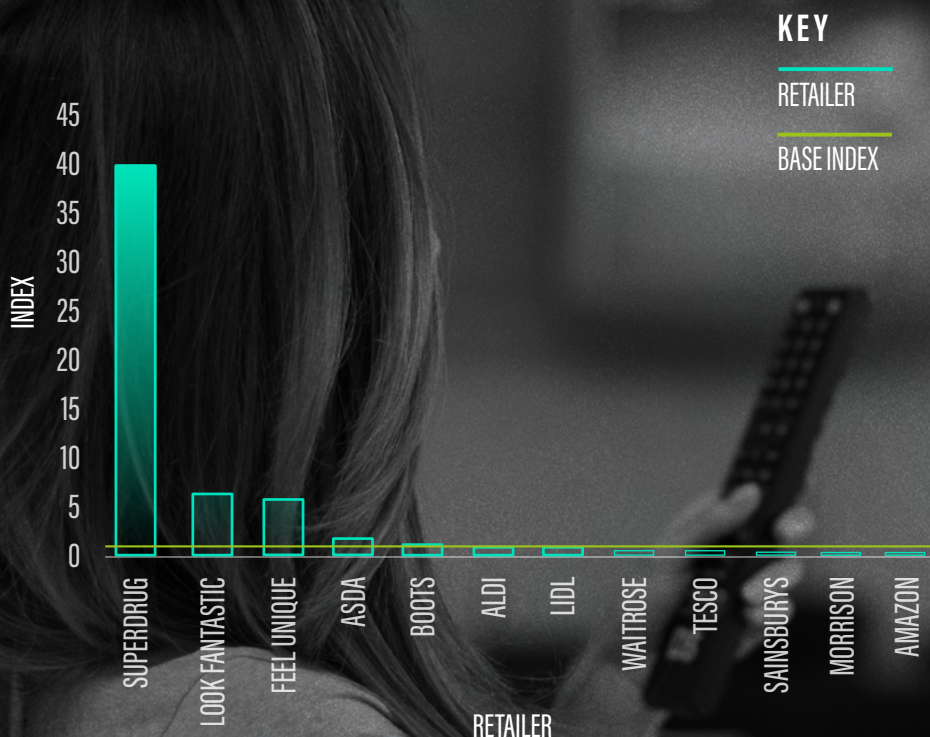
# TV FUELS PURCHASE INTENT

HAIRCARE IS A SATURATED MARKET, WITH BRANDS EXPERIENCING DIFFICULTY IN BUILDING LOYALTY WITH CONSUMERS. TV IS AN IMPORTANT CHANNEL TO BUILD AWARENESS AND BRAND AFFINITY, WITH RESEARCH SUGGESTING THAT THE AVERAGE PERSON SPENDS ALMOST 10 YEARS OF THEIR LIFE WATCHING TV (INDEPENDENT, 2018).

When identifying where consumers go to search for their haircare products, Search revealed that consumers were **23x** more likely to search for Superdrug over any other retailer during May to August. Interestingly, Superdrug was a prime-time sponsor during this period for reality TV show, Love Island. Online beauty giants, Feel Unique and Look Fantastic also indexed high for haircare searches, reflecting

the shift from brick-and-mortar stores to e-commerce. Consumers are only 1.4x more likely to search for Boots when looking for haircare, which is surprising considering the retailers reputation and the number of haircare brands available online. Apart from Asda, supermarkets and Amazon under indexed, suggesting that consumers are more likely to search for haircare through health and beauty retailers.

## TOP SEARCHED RETAILERS FOR HAIRCARE

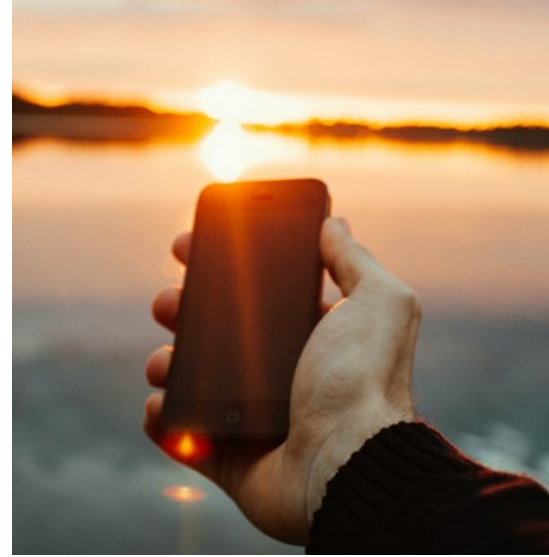


## KILLER INSIGHTS

+ Users searching around haircare products are **40x** MORE likely to be searching for **SUPERDRUG** than any other retailer

# MOBILE FIRST

MOBILE SURFING TIME IS EXPECTED TO GROW TO 2 HOURS AND 14 MINUTES PER DAY BY 2019 (CAMPAIGN, 2018). CONSUMERS SEARCH BEHAVIOUR ACROSS DEVICE REVEALS INVALUABLE INSIGHTS FOR BRANDS, INCLUDING KEY ACTIVATION TIMES TO TARGET CUSTOMERS.



Desktop remains the dominant device for haircare, with consumers predominantly researching around brands and reviews of products. In contrast, searches conducted on mobile are focused on influencers and specific haircare problems. Tablet searches only accounts for a minority of the market, experiencing a decline in the past six months. Whilst desktop searches remain high, mobile has grown more quickly (by 7%) over the past six months and now accounts for **36.9%** of haircare searches.

The majority of consumers searching around haircare are doing so in the evenings. However, **19.0%** of desktop users typically search in the lead up to lunch and late afternoon, whilst at work. Tablet users typically search for haircare at the weekend, presumably from the comfort of their home.

## HAIRCARE SEARCHES BY DEVICE

### KEY

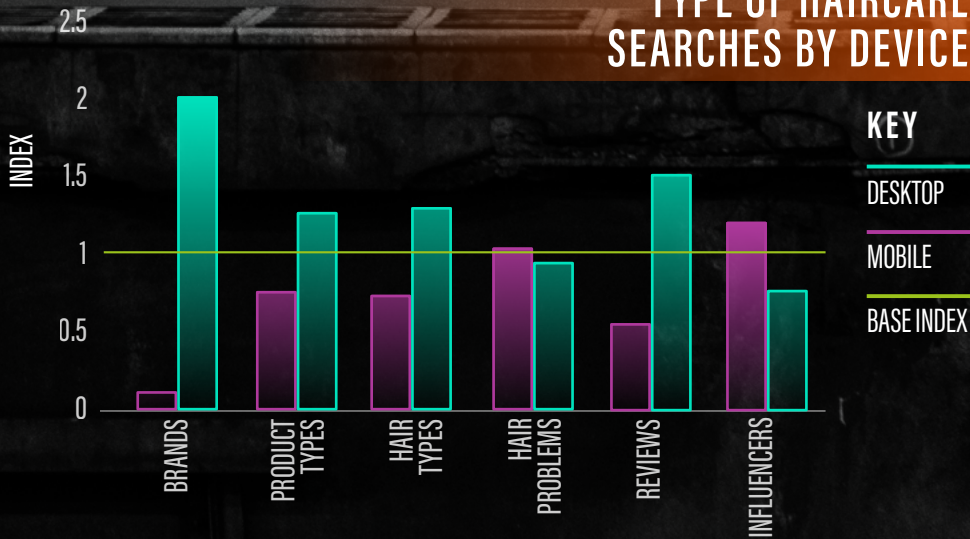
DESKTOP 54.9%

MOBILE 36.9%

TABLET 8.2%



## TYPE OF HAIRCARE SEARCHES BY DEVICE



## KILLER INSIGHTS

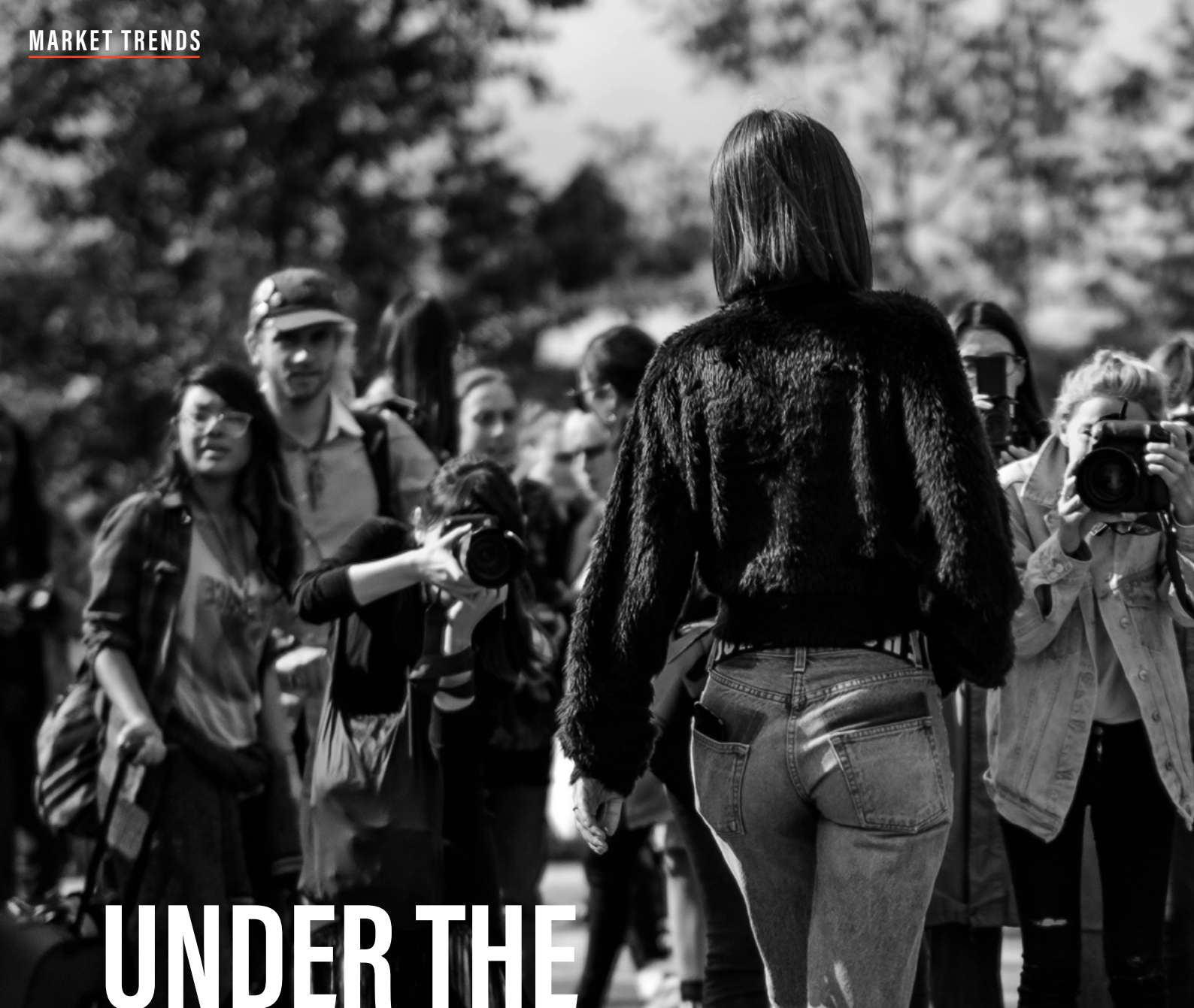
+ Key search **DAYS** for haircare brands:

DESKTOP: Monday & Friday  
 MOBILE: Tuesday & Wednesday  
 TABLET: Saturday & Sunday

+ Key search **TIMES** for haircare brands:

DESKTOP: 11:00, 16:00  
 MOBILE: 19:00, 22:00  
 TABLET: 17:00, 22:00





# UNDER THE INFLUENCE

INFLUENCER MARKETING IS EXPECTED TO BE WORTH BETWEEN \$5 TO \$10 BILLION BY 2020 (CONSULTANTS INSIDER, 2018).

Brands are increasingly using influencer content as part of their core brand marketing strategy to boost sales, increase reach and awareness, whilst fostering trust to build loyalty.

Haircare brands should identify audiences that are proactively searching around influencers, affiliated brands and competitors, allowing the brand to tap into broader connected search categories associated with influencers.

## THE MOST SEARCHED FOR HAIRCARE INFLUENCERS OF 2018:

- |                      |       |
|----------------------|-------|
| 1. JEN ATKIN         | 54%   |
| 2. TRACEY CUNNINGHAM | 13.2% |
| 3. SAM MCKNIGHT      | 13.1% |
| 4. SCOTTY CUNHA      | 3.8%  |
| 5. SALI HUGHES       | 3.4%  |

\*Figures based upon share of search of top 70 haircare influencers



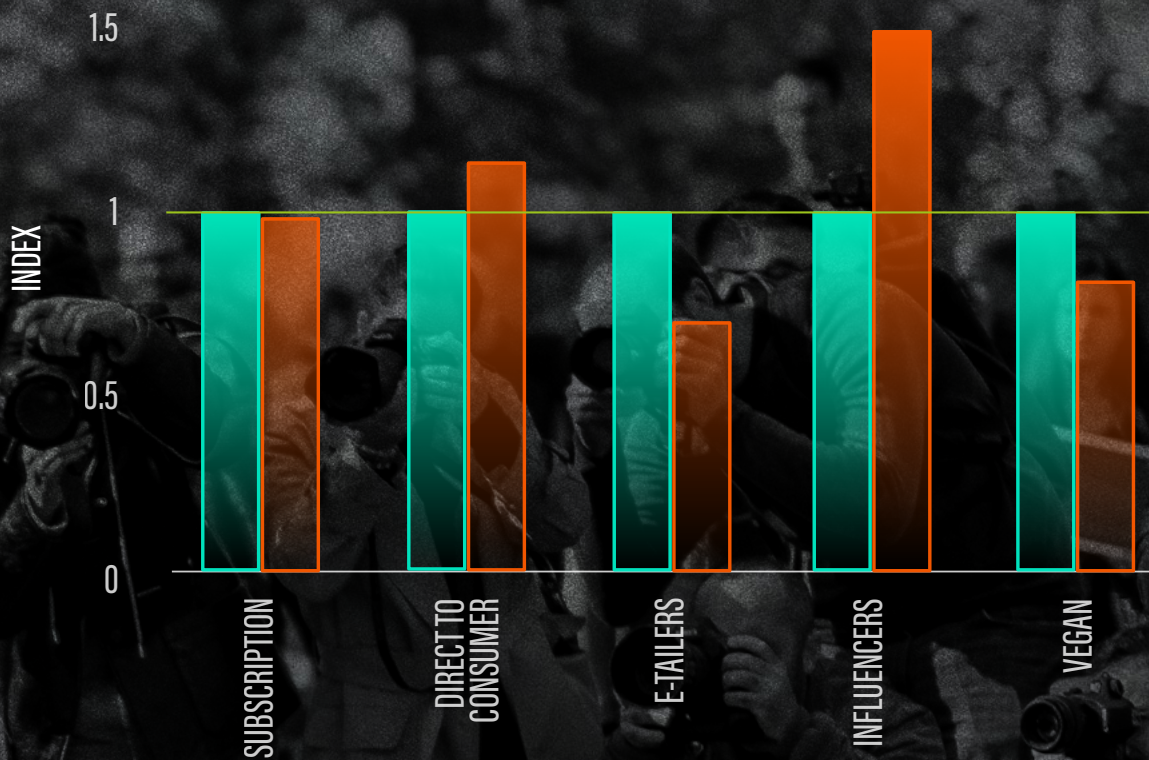
# SEARCH INDEX VS TRENDS: 2017–2018

## KEY

2017

2018

BASE INDEX



## HAIRCARE MARKET TRENDS

# KILLER INSIGHTS

WHAT IS THE TRUE POWER OF INFLUENCERS?

+ JOHN FRIEDA saw a **2208%** search uplift over two days after announcing Rochelle Humes as the new brand ambassador for their 'Frizz Ease Dream Curls' product

+ **55.3%** increase in searches for **INFLUENCERS** (year-on-year)

+ **IGK HAIR** saw a **173%** search uplift after influencer, Zoella, promoted the products via YouTube

+ Heavily influencer promoted brand, **COCO & EVE**, saw a **324.9%** search uplift (year-on-year)

+ Brand endorsements don't always mean results—**L'OREAL** only saw a **4.7%** increase in searches following their Cheryl Tweedy, Casting Crème Gloss advert in 2018. Is this why L'Oreal decided to end their contract with Cheryl?

# DI SR UP TO RS

## ARE DISRUPTORS TRULY POWERFUL OR JUST A FAD?

In the past year, disruptor haircare brands have come out of nowhere, shaking up the haircare industry and providing healthy competition for established brands.

For haircare, new challenger products are often purchased as a one-off, with many consumers reverting back to trusted haircare brands. Recently, haircare giants have been acquiring niche and nimble brands to become disruptors themselves.

Search Intelligence reveals killer insights around disruptor brands and their audiences.



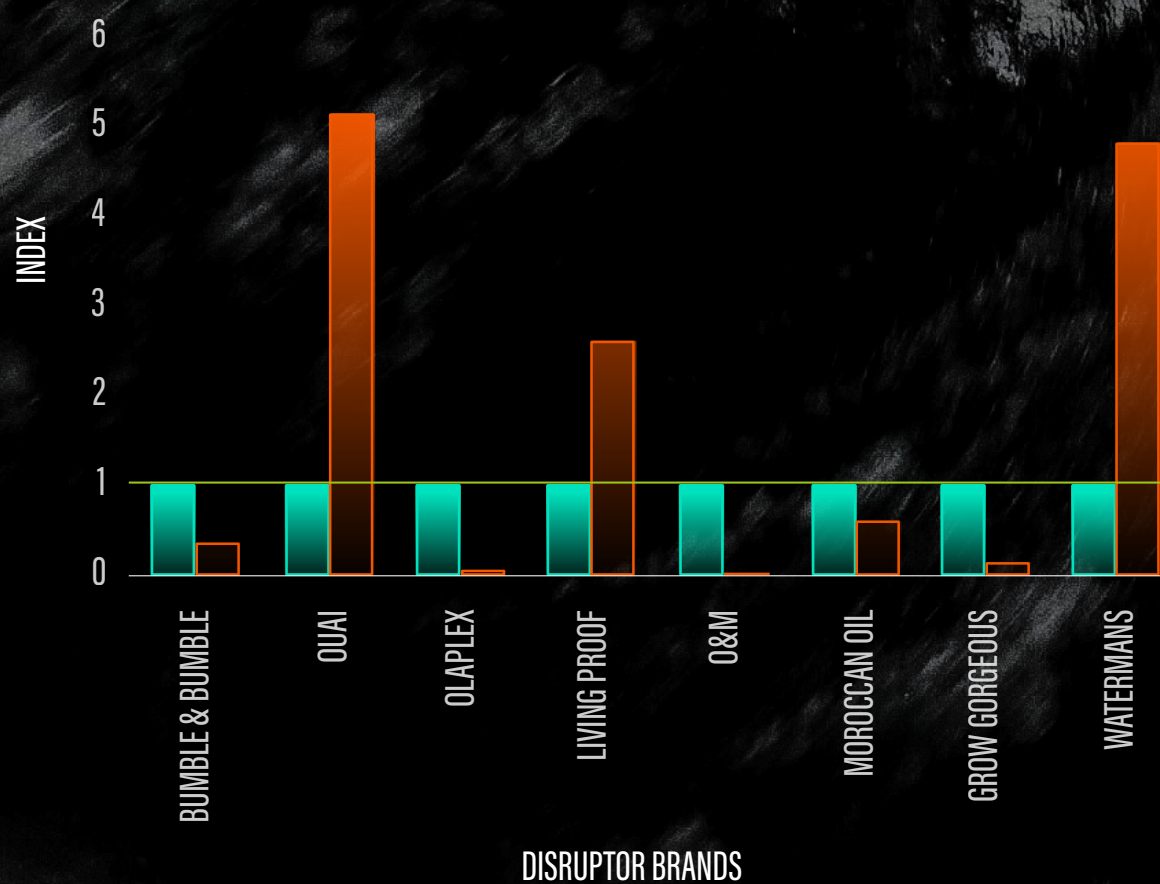
## INDEX OF MOST SEARCHED FOR DISRUPTOR BRANDS: 2017–2018

KEY

2017

2018

BASE INDEX





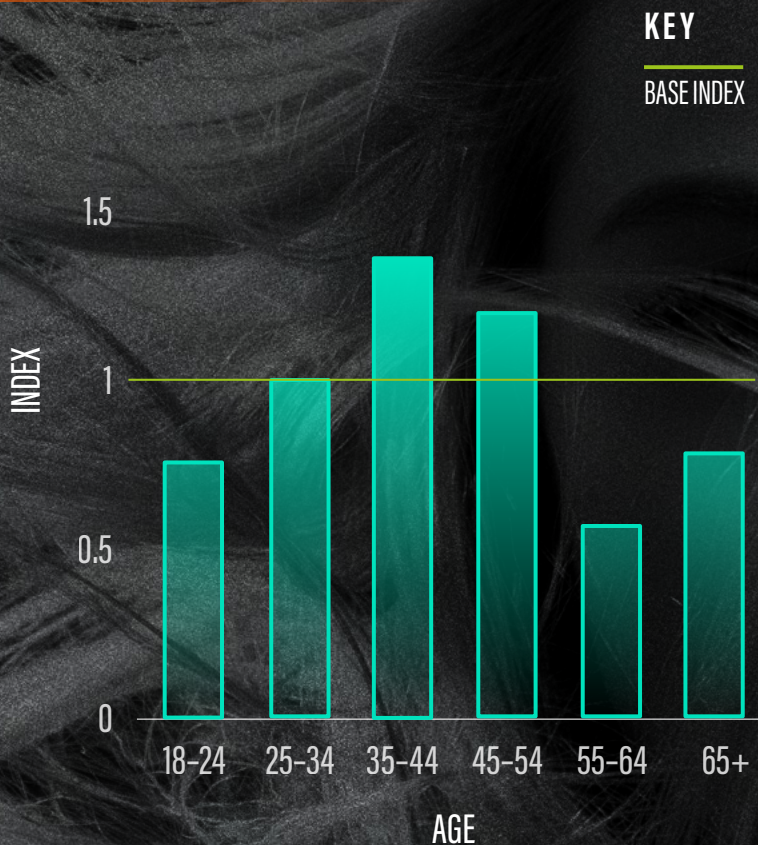
# THE ONLY OUAI FOR NOW

Ouai was founded in 2016 by Jen Atkin, a Celebrity Hair Stylist. This female-led haircare brand targets real women by combining accessibility with luxury. Among her roster of celebrity clients, Atkin was named by the New York Times as the 'Most Influential Stylist in the World'. Consumers are **5x** more likely to be searching for Ouai than this time last year. When identifying top related searches for OUA I, hidden audiences and associated brands are revealed.

Brands should arm themselves with unique competitor intelligence to intercept challengers. By identifying those with a high share of search, brands can target users actively searching around competing products.



## OUAI AUDIENCE PROFILES



## KILLER INSIGHTS

+ People searching for OUA I are **92x** MORE likely to be searching for DIOR

+ Other affiliated brands include: TOM FORD TANGLE TEEZER Bio-Oil

+ Consumers searching for OUA I are: **90x** MORE likely to be searching for the KARDASHIANS

**45x** MORE likely to go on to search for PARENTING PRODUCTS

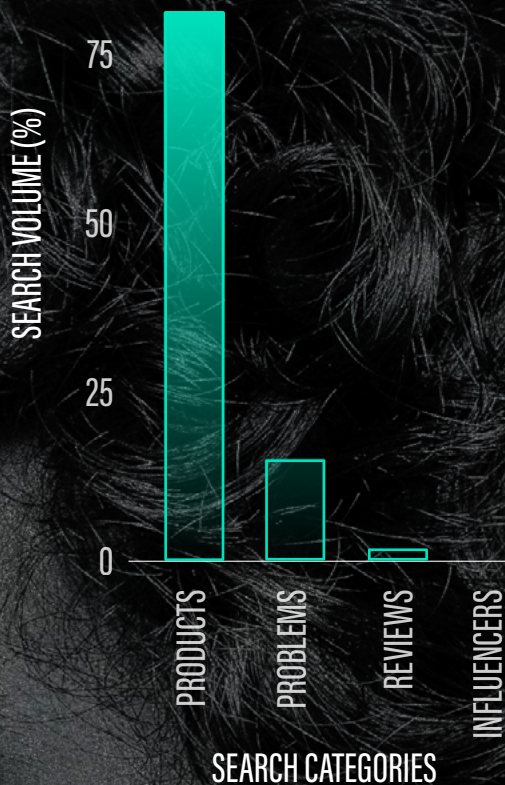


# WATERMANS WINS FOR NOW

Watermans is a disruptor brand that came out of nowhere, suggesting why it has the highest share of haircare search volume over the past six months. Watermans offers unisex, chemical free products specifically designed for hair growth. Whilst these disruptors may not stay around for long, they do benefit the haircare industry by driving overall awareness and increasing share of search for brands.



## TOP SEARCH CATEGORIES AROUND WATERMANS



## KILLER INSIGHTS

+ Consumers are:

**50.4x** MORE likely to be searching for **COSMETIC SURGERY**

**43x** MORE likely to be searching for **BRAUN**

+ Other affiliated brands include:

habitat<sup>®</sup> morphy richards<sup>®</sup> amazon

In comparison to OUAL, all of these are household brands

+ **82%** of searches for Watermans were around specific products such as 'WATERMANS GROWME SHAMPOO', 'WATERMANS GROW SHAMPOO' or 'WATERMANS CONDITIONME'. This suggests that consumers have high awareness of the brand and product range, coupled with high intent to make a purchase

+ When searching for Watermans, only **15.4%** of consumers searched around problems such as 'hair loss' and less than **2%** around reviews. Whilst Watermans has a portfolio of celebrity influencers, such as Charlotte Crosby, less than **1%** searched around these. This may be because their key audience (**35-44** and **45-54**) aren't interested in these influencers.

# **ACTION THE POWER OF SEARCH**

**Conquest competitors  
through interception to  
disrupt the user journey.**





# MOMENT OF TRUTH

20



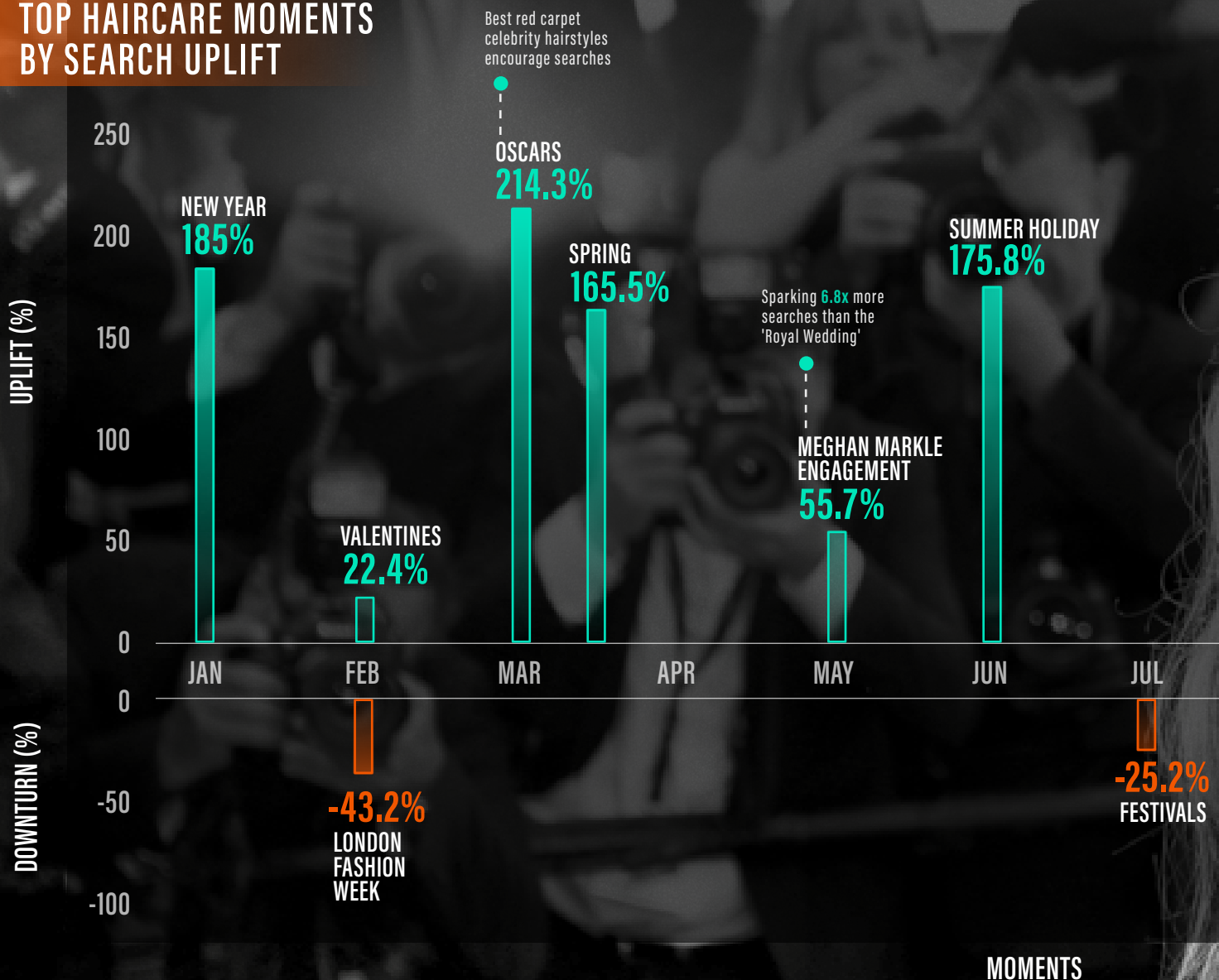
# HAIR MOMENTS THAT MATTER

HAIRCARE BRANDS NEED TO PLAN AND ACTIVATE AROUND KEY TRIGGER MOMENTS TO CONNECT AND STAY RELEVANT WITH THEIR AUDIENCES.

Search reveals the haircare moments throughout the year that consumers are experiencing and planning for, and how they impact consumer behaviour; from pivotal real-life moments, planned calendar events to short sporadic moments.

In 2018, the Oscars resulted in the most significant uplift, suggesting that searches around haircare are heavily inspired by influential people such as celebrities.

## TOP HAIRCARE MOMENTS BY SEARCH UPLIFT





# KILLER INSIGHTS

In addition, calendar moments such as New Year, Summer and Autumn trigger behaviour as people look to change their hairstyles and purchase seasonal products. Consumers are also more likely to be motivated by sporadic moments such as convenience, chill/relaxation and bargains when searching for haircare, suggesting that consideration and intent is often spontaneous.

Moments expected to be aligned with buying haircare, such as Christmas, London Fashion Week and festivals, under indexed compared to the general population.

+ When searching for haircare consumers are **381x** MORE likely to be searching around **CONVENIENCE**

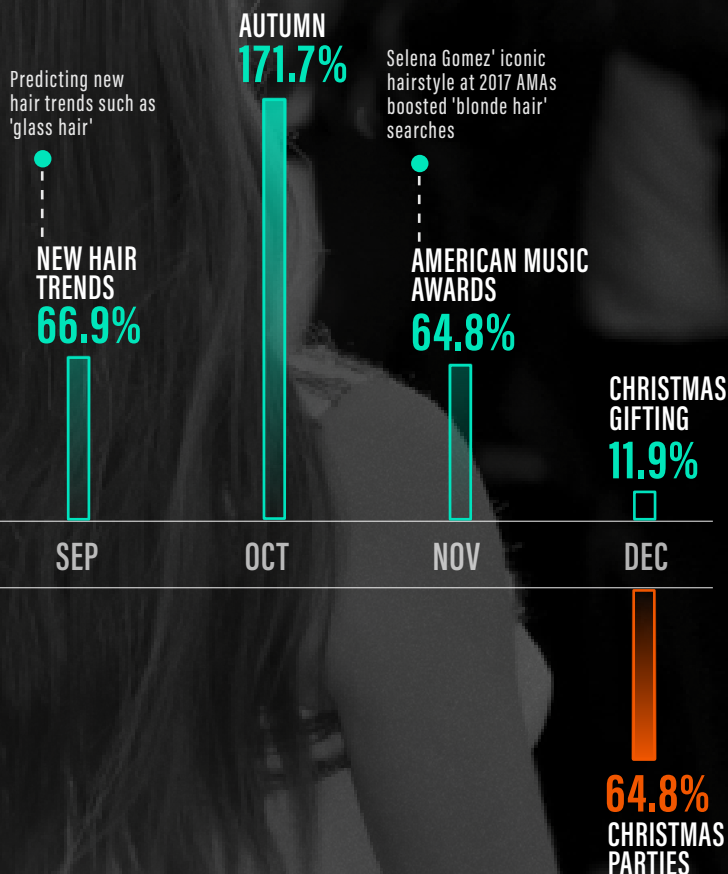
+ **AUSSIE** is the top brand related to **CONVENIENCE**, accounting for **8.7%** of haircare searches

+ **WATERMANS** is ranked as the No.1 haircare brand for searches around **CHILL/RELAXATION** and **WEDDING SEASON**

## KEY

UPLIFT

DOWNLIFT



## TOP SPORADIC MOMENTS

1. CONVENIENCE 9.5x
2. CHILL/RELAXATION 5.0x
3. BARGAINS 3.6x

## TOP HAIRCARE SEARCHES AROUND CONVENIENCE:

1. CLOSEST HAIRDRESSERS 31%
2. HAIR COLOUR 12%
3. HAIR CUT 11%

## TOP HAIRCARE SEARCHES AROUND CHILL/RELAXATION:

1. HAIRDRESSERS 22%
2. HAIR TREATMENTS 19%
3. HAIR MASKS 3%

## TOP HAIRCARE SEARCHES AROUND BARGAINS:

1. FREE HAIRCUT 28.8%
2. DISCOUNTED HAIR STRAIGHTNERS 10.4%
3. HALF PRICED SHAMPOO & CONDITIONER 5.7%

<< **MOMENT OF TRUTH**

---

# **ACTION THE POWER OF SEARCH**

**Activate 'always-on'  
activity to target users in  
spontaneous moments.**





**AUDIENCE**





# TALKING HEADS

MANY FMCG BRANDS TAKE A 'ONE SIZE FITS ALL' APPROACH WITH CONSUMERS, WHETHER IT'S BRAND MESSAGING, CAMPAIGNS OR PRODUCT PACKAGING. HOWEVER, THIS COURSE OF ACTION IS OFF THE MENU FOR HAIRCARE.

Social media and changes in technology have disrupted the way that consumers interact with brands, with more personalisation led brand experiences. It's now a two way relationship, where consumers lead the conversation.

So how do mass brands connect effectively with consumers? Search lifts the lid on the most common searched for haircare problems and the **audiences that index highest** around them. This provides insight into the mindsets and motivations of consumers, in particular passions, real-life interests, trigger moments and intent signals that can be used for brand activation.

## DAMAGED

ENTREPRENEURS ARE 6.7x MORE LIKELY THAN ANY AUDIENCE TO SEARCH FOR DAMAGED HAIR. ARE THEY MORE IMAGE CONSCIOUS BECAUSE OF THEIR JOB?

TOP AGE PROFILES:

1. 45-54
2. 35-44
3. 25-34

GENDER: FEMALE

LIFE PROFILES:  
ENTREPRENEURS

LIFE MOMENTS:  
PROMOTION

SPORADIC MOMENTS:  
TREAT YOURSELF

CONNECTED INTERESTS:  
1. BEAUTY & COSMETICS  
2. LUXURY LIFESTYLES  
3. RELAXATION

TOP SEARCHED FOR HAIRCARE BRANDS:  
1. AUSSIE 10.7%  
2. PANTENE 7.8%  
3. GARNIER 6.6%

TOP SEARCHED FOR BRANDS FROM OTHER INDUSTRIES:  
1. APPLE 27.8%  
2. RANGE ROVER 14.0%  
3. UGG 10.6%

## DANDRUFF

CAN STRESS-INDUCED DANDRUFF FROM MOVING HOUSE SPARK SEARCHES AROUND HEAD & SHOULDERS?

TOP AGE PROFILES:

1. 45-54
2. 35-44
3. 18-24

GENDER: MALE

LIFE PROFILES:  
STAY AT HOME PARENTS

LIFE MOMENTS:  
MOVING HOUSE

SPORADIC MOMENTS:  
CONVENIENCE

CONNECTED INTERESTS:  
1. HEALTH  
2. NEWS  
3. BUSINESS & INDUSTRIES

TOP SEARCHED FOR HAIRCARE BRANDS:  
1. HEAD & SHOULDERS 14.0%  
2. L'OREAL 12.9%  
3. PANTENE 11.1%

TOP SEARCHED FOR BRANDS FROM OTHER INDUSTRIES:  
1. YORKSHIRE TEA 21.7%  
2. FAIRY 11.1%  
3. M&S 10.8%





# DRY

TOP AGE PROFILES:

1. 45-54
2. 25-34
3. 35-44

GENDER: FEMALE

LIFE PROFILES:

DIY (DO IT YOURSELF)

LIFE MOMENTS:

NEW HOME

SPORADIC MOMENTS:

BARGAINS

CONNECTED INTERESTS:

1. SCIENCE
2. HOME & GARDEN
3. DIY

TOP SEARCHED FOR HAIRCARE BRANDS:

1. GARNIER 9.0%
2. AUSSIE 5.3%
3. REDKEN 4.7%

TOP SEARCHED FOR BRANDS FROM OTHER INDUSTRIES:

1. DYSON 6.1%
2. MIELE 4.8%
3. PANASONIC 3.0%

NEW HOME OWNERS ARE 3x TIMES MORE LIKELY TO SEARCH AROUND BARGAINS FOR HAIRCARE, ARE THEY SPENDING THEIR MONEY ON HOUSEHOLD APPLIANCES INSTEAD?

# DULL

TOP AGE PROFILES:

1. 25-34
2. 45-54
3. 55-64

GENDER: FEMALE

LIFE PROFILES:

CITY DWELLER

LIFE MOMENTS:

NEW JOB

SPORADIC MOMENTS:

CONVENIENCE

CONNECTED INTERESTS:

1. BEAUTY & COSMETICS
2. FOOD & DRINK
3. TRAVEL

TOP SEARCHED FOR HAIRCARE BRANDS:

1. AUSSIE 14.8%
2. JOHN FRIEDA 9.3%
3. REDKEN 5.6%

TOP SEARCHED FOR BRANDS FROM OTHER INDUSTRIES:

1. HTC 24.7%
2. TIA MARIA 18.2%
3. SAMSUNG 13.3%

CITY DWELLERS ARE 54.5x MORE LIKELY TO SEARCH AROUND CONVENIENCE, IS THIS BECAUSE OF HECTIC CITY LIFE?





# FRIZZY

TOP AGE PROFILES:

1. 35-44
2. 55-64
3. 18-24

GENDER: FEMALE

LIFE PROFILES:  
PARENTS OF TEENAGERS

LIFE MOMENTS:  
GETTING MARRIED

SPORADIC MOMENTS:  
DECISION-MAKING

CONNECTED INTERESTS:

1. HEALTH
2. RELAXATION
3. HOME IMPROVEMENTS

TOP SEARCHED FOR  
HAIRCARE BRANDS:

1. AUSSIE 10.6%
2. REDKEN 9.1%
3. JOHN FRIEDA 7.1%

TOP SEARCHED FOR BRANDS FROM  
OTHER INDUSTRIES:

1. BOLD 33.8%
2. NETFLIX 10.4%
3. B&Q 2.7%

DO PEOPLE  
SPEND MORE TIME  
DECISION-MAKING  
AROUND HAIRCARE  
BRANDS FOR THEIR  
BIG DAY?



# HAIR LOSS

TOP AGE PROFILES:

1. 45-54
2. 18-24
3. 55-64

GENDER: MALE

LIFE PROFILES:  
BUSINESS PERSON

LIFE MOMENTS:  
JOB SEEKING

SPORADIC MOMENTS:  
CONVENIENCE

CONNECTED INTERESTS:

1. REMEDIES
2. HEALTH
3. NEWS

TOP SEARCHED FOR  
HAIRCARE BRANDS:

1. JOHN FRIEDA 16.4%
2. WATERMANS 5.9%
3. REVLON PROFESSIONAL 4.9%

TOP SEARCHED FOR BRANDS FROM  
OTHER INDUSTRIES:

1. VOLKSWAGEN 5.8%
2. BBC 5.3%
3. AMAZON 5.0%

BUSINESSMEN  
SEARCHING FOR  
HAIRCARE ARE 111.4x  
MORE LIKELY TO LOOK  
FOR 'REMEDIES' TO  
HAIR LOSS.  
IS THIS DRIVEN  
BY JOB SEEKING?







# KILLER INSIGHTS

+ Consumers searching for dandruff are **381x** MORE likely to be searching for **YORKSHIRE TEA**

+ Consumers searching around hair loss are over **286x** MORE likely to be searching for **REMEDIES**

+ When searching for haircare, students are **6.2x** MORE likely to search for **DANDRUFF**

+ Female vs Male share of hair search: **79.3% v 20.7%**

+ **AUSSIE** is the no.1 brand for searches around damaged, dull and frizzy hair

+ Searches for **DULL HAIR** and **HAIR LOSS** are triggered by calendar moments, such as seasonal weather

## OILY/GREASY

### TOP AGE PROFILES:

1. 18-24
2. 45-43
3. 35-44

GENDER: **MALE**

LIFE PROFILES: **MILLENNIALS**

LIFE MOMENTS: **UNIVERSITY**

SPORADIC MOMENTS: **BOREDOM**

### CONNECTED INTERESTS:

1. **REMEDIES**
2. **FOOD & DRINK**
3. **FITNESS**

### TOP SEARCHED FOR HAIRCARE BRANDS:

1. **L'OREAL 10.0%**
2. **JOHN FRIEDA 8.2%**
3. **REDKEN 5.0%**

### TOP SEARCHED FOR BRANDS FROM OTHER INDUSTRIES:

1. **COMFORT 27.1%**
2. **LINDT 13.4%**
3. **DAILY STAR 11.3%**

MILLENNIALS SEARCHING FOR OILY/GREASY HAIR PROBLEMS ARE **285.9x** MORE LIKELY TO SEARCH FOR 'REMEDIES'. IS THIS DRIVEN BY STARTING UNIVERSITY?

## SPLIT ENDS

### TOP AGE PROFILES:

1. 18-24
2. 45-54
3. 25-34

GENDER: **FEMALE**

LIFE PROFILES: **MILLENNIALS**

LIFE MOMENTS: **NEW CAR**

SPORADIC MOMENTS: **DINNER OUT**

### CONNECTED INTERESTS:

1. **BEAUTY & FITNESS**
2. **COOKING/FOOD**
3. **TV/BOX SETS**

### TOP SEARCHED FOR HAIRCARE BRANDS:

1. **TIGI 58.3%**
2. **OGX 33.3%**
3. **HERBAL ESSENCES 8.3%**

### TOP SEARCHED FOR BRANDS FROM OTHER INDUSTRIES:

1. **EASYJET 57.7%**
2. **HYUNDAI 16.2%**
3. **VAUXHALL 13.8%**

SEARCHES FOR TIGI ARE HIGH AMONGST MILLENNIALS, ARE LUXURY BRANDS SEEN AS MORE ACCESSIBLE FOR THIS AUDIENCE?



# THE NEW LUXURY

ONE THING IS CERTAIN, THE LUXURY MARKET IS POISED FOR CHANGE. 'THE MAIN GROWTH ENGINE OF THE LUXURY MARKET IS A GENERATIONAL SHIFT, WITH 85% OF LUXURY GROWTH IN 2017 FUELLED BY GEN Y AND GEN Z' (BAIN & COMPANY, 2017).

Haircare is no exception, with luxury brand growth being driven by the increasing spending power of millennials. Endorsement for luxury brands was a role traditionally filled by celebrities, however there has been a shift towards influencers collaborating with upmarket haircare brands as a crowdsourcing initiative for new product ideas.

Consumers are increasingly expecting more from luxury brands, especially when it comes to justifying the price tag. Personalisation has become a must-have for differentiating brands and addressing unique haircare problems. Brands such as Prose and Function of Beauty provide customised hair products based on your hair needs, styling habits, location and lifestyle.

How do luxury haircare brands keep their stature, but become more accessible to growing audiences such as millennials?

# HEAD T

## SEARCH INTELLIGENCE REVEALS RELATED TO LUXURY AND

### TOP 3 AUDIENCES SEARCHING FOR LUXURY HAIRCARE:

1. BUSINESS TRAVELLERS
2. MILLENNIALS
3. CITY DWELLERS

### TOP HAIRCARE SEARCHES FOR LUXURY AUDIENCE:

1. CONDITIONER 32%
2. SHAMPOO 21%
3. COLOURPLEX SHAMPOO 6%

### TOP PROBLEM SEARCHES AROUND HAIRCARE FOR LUXURY MARKET:

1. FRIZZY
2. SPLIT ENDS
3. HAIR LOSS

### TOP SEARCHED FOR LUXURY HAIRCARE BRANDS:

1. WATERMANS 27%
2. TIGI 18%
3. KERASTASE 6%

### TOP SEARCHED FOR LUXURY BRANDS IN OTHER INDUSTRIES:

1. DYSON 40%
2. JO MALONE 39%
3. CHAMPNEYS 15%



# 0 HEAD

## THE TOP SEARCHES AND BRANDS MASS MARKET AUDIENCES

### TOP 3 AUDIENCES SEARCHING FOR MASS MARKET HAIRCARE:

1. STAY AT HOME PARENTS
2. PARENTS OF TODDLERS
3. FAMILY SHOPPERS

### TOP HAIRCARE SEARCHES FOR MASS MARKET:

1. SHAMPOO 35%
2. LEAVE IN CONDITIONER 30%
3. 2 IN 1 SHAMPOO 18%

### TOP PROBLEM SEARCHES AROUND HAIRCARE FOR MASS MARKET:

1. DANDRUFF
2. DULL
3. OILY/GREASY

### TOP SEARCHED FOR MASS MARKET HAIRCARE BRANDS:

1. DOVE 65%
2. AUSSIE 23%
3. WELLA 13%

### TOP SEARCHED FOR MASS MARKET BRANDS IN OTHER INDUSTRIES:

1. LYNX 14%
2. ARIEL 29%
3. PERSIL 15%

## APPEALING TO THE MASSES

'THE GLOBAL HAIRCARE MARKET IS EXPECTED TO REACH \$211.1 BILLION BY 2025' (GRAND VIEW RESEARCH, 2018), WITH GROWTH OPPORTUNITIES FOR LUXURY AND MASS BRANDS ALIKE.

Despite disruptors shaking up the market and driving new trends, mass brands continue to dominate overall share of search for haircare. In everyday life, consumers will always be drawn to accessible products that offer value for money, with mass market shampoo and conditioner continuing to be perceived as staples.

How do mass brands stand out in a cluttered market, where hundreds of brands are vying for attention?

## KILLER INSIGHTS

+ Luxury haircare consumers are **2.3x** MORE likely to search for **INFLUENCERS** than the mass market audience


+ Mass market haircare consumers are **3.45x** MORE likely to search for **PRICE** than the luxury audience



# ACTION THE POWER OF SEARCH

Expand reach by  
tapping into unique,  
hidden audiences.





# THE IMPACT OF ADVERTISING







# INFLUENCING THE INFLUENTIAL

BY ROSIE CAVE, LUXURY MEDIA AT HEARST

It's no secret that more and more of us are looking at our fellow consumers to influence our purchasing decisions. Whether it's discovering the latest 'it' bag, the must-have face cream, or the hottest holiday destination for 2018, we (the consumers) are no longer looking to companies for the best cult beauty products and latest launches. Instead, we are using social media, blogs, reviews and websites for our next inspiration. Therefore, it is no surprise that for the past several years, influencers have become the hottest topic in advertising and they aren't stopping here.

Hair is big in the world of social media. In fact, on Instagram there are nearly 160 million posts with the hashtag '#hair', 17.6 million with '#hairstyles' and another whopping 18.8 million with '#haircolour'. When you start scrolling through these hashtags, you see a vast wealth

of content and inspiration, from pixie crops and purple highlights, to floor-length golden locks and everything in between.

In a cluttered market space such as haircare, brands are constantly looking for new and exciting ways to engage with niche audiences, especially for new brands trying to get on the map. Haircare and beauty has become much more personal, whereby fellow consumers are heavily influencing purchase behaviour, not the conglomerates.

There has been a huge power shift, from celebrities commanding brand marketing to the familiar girl-next-door stealing the spotlight, whether that's micro-influencers (less than 10,000 followers) or power-middle influencers (10,000–250,000 followers). These influencers are much





more relatable and personable than red-carpet celebrities, and as a result, their opinions and recommendations hold a greater weight with their audience.

The popularity of influencers has been strengthened by their ability to foster trust and build brand loyalty. They are in charge of the content and how the brand message is portrayed to their followers, promoting authenticity and allowing the audience to emotionally connect with the product. For consumers, it's finding something they can emulate and buy into. Instead of simply saying "hey, buy my product", marketing strategies are now generating interest in a product/brand through association and the element of trust. It's a time where personality wins sales, not the company.

Much like celebrity endorsement, influencer marketing doesn't come without its risks. If the influencer posts something misleading, or untrustworthy, it discredits their integrity. Audiences will stop listening and brands will stop working with them. Audience trust is key to the influencer's survival.

In a world where nothing comes for free, influencers and celebrities who post the perfect 'insta #hair picture', are more likely to have a '#ad' or '#spon' hidden amongst their carefully curated words, than be a genuine fan. Based on follower count, influencers can be paid hundreds or even thousands of pounds to promote a particular brand or product. With this comes increased skepticism around influencers and the tactics that brands use to market their products. With audiences gaining more knowledge of how this works, will consumers begin to lose trust in influencers?

So how long can influencer marketing last? One thing is certain, we (the real, genuine consumers) hold the power. Authenticity is key, and companies need to remember this when building their next marketing campaign. We all have our favourite personalities, but unless they have a serious, trusted fan base, the results could be detrimental to the influencer and/or celebrity, and of course, the brand.















# COMMENTARY





# HAIRCARE IS POISED FOR CHANGE

Disruptors are the biggest search trend of haircare in 2018, with Watermans dominating share of voice in the market. Are they shortlived? Whilst these challenger brands drive overall awareness and search volume around haircare, consumers often revert back to established brands that they know and trust.

Consumers are powerful in haircare, determining when, where and how they interact with brands. With more touchpoints and choice of brands than ever before, they are spending an increasing amount of time online searching for haircare products, in particular conditioner. Organic has become an important factor affecting brand preference, driven by ingredient conscious consumers focused on the long-term health of their haircare.

Whilst many consumers are searching around convenience and bargains, major events such as The Oscars and New Year have been proven to trigger searches around haircare. Influencers continue to be of value, with haircare brands seeing significant uplift when aligning themselves with the correct figure for that audience.

<p><b>01</b> <b>KNOWLEDGE IS POWER</b></p> <p>Predict macro and seasonal trends through search to stay ahead of the competition.</p>	<p><b>02</b> <b>BE IN THE KNOW</b></p> <p>Identify key search touchpoints that spark conversation and influence consumer behaviour.</p>	<p><b>03</b> <b>CONNECT TO SUCCEED</b></p> <p>Tune in, provoke and co-create. Utilise search to truly connect with consumers.</p>	<p><b>04</b> <b>BE SAVVY</b></p> <p>Tap into the power of influencers, find the most appropriate influencer for your brand using the power of search.</p>
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# APPENDIX





# APPENDIX

The results detailed in this report are based on a total of **491 million** global haircare searches from 29 August 2017 to 29 August 2018, extracted from the global Captify network.

## 11-12 TOP 100 SEARCHED HAIRCARE BRANDS

Based on search volume (%) of brands for the period of July 2017 to July 2018, excluding searches for hair electricals

## 13-14 BATHROOM SHELFIE (PRODUCT SEARCH VOLUME)

Based on search volume (%) of haircare products for the period of January–August 2018

## 14 BATHROOM SHELFIE (TOP 10 MOST SEARCHED FOR CONDITIONER BRANDS)

Based on search volume (%) of conditioner brands for the period of January

## 16 BEYOND THE BOTTLE (PRODUCT ATTRIBUTES)

Based on search volume (%) of different product attributes for shampoo and conditioner for the period of January–August 2018

## 17 TV FUELS PURCHASE INTENT (TOP SEARCHED RETAILERS FOR HAIRCARE)

Based on the search index of the top retailers in relation to haircare searches for the period of January–August 2018

## 18 MOBILE FIRST (HAIRCARE SEARCHES BY DEVICE)

Based on search volume (%) of haircare searches by device for the period of August 2017–August 2018

## 18 MOBILE FIRST (TYPE OF HAIRCARE SEARCHES BY DEVICE)

Based on key haircare searches and how they index by device for the period of January–August 2018

## 19 UNDER THE INFLUENCE (THE MOST SEARCHED FOR HAIRCARE INFLUENCERS OF 2018)

Based on the share of search volume (%) of the top 70 searched for haircare influencers for the period of January–August 2018

## 20 UNDER THE INFLUENCE (SEARCH INDEX VS TRENDS: 2017–2018)

Based on haircare market trends and how these index year-on-year (August 2017–August 2018)

## 21 DISRUPTORS (INDEX OF MOST SEARCHED FOR DISRUPTOR BRANDS (2017–2018))

Based on the top 8 disruptor brands and how these index year-on-year (August 2017–August 2018)

## 23 THE ONLY OUIAI FOR NOW (OUIAI AUDIENCE PROFILES)

Based on pre-set age profiles and how Ouai indexes around these audiences

## 24 WATERMANS WINS FOR NOW (TOP SEARCH CATEGORIES AROUND WATERMANS)

Based on the search volume (%) of predefined key searches around Watermans for the period of January–August 2018

## 27-28 HAIR MOMENTS THAT MATTER (TOP HAIRCARE MOMENTS BY SEARCH VOLUME)

Based on the uplift of the different moments vs the uplift of those moments in relation to haircare searches (year to date). To calculate the uplifts, the largest increase in the general moment was noted, then using the same date range it was calculated whether hair searches increased or decreased. The first day of the date range is then set as the base for the uplift or downlift (%).

# GLOSSARY

**Index**—to account for any natural skew that may be seen within Captify's publisher network, the results are compared to the underlying dataset. This allows us to show the difference between a particular audience and the rest of our database.

## CALENDAR MOMENTS

From national holidays to sporting events, stay relevant during planned calendar moments:

- **American Music Awards**—selenagomez, American Music Awards, AMA, AMAs and new hair, blonde
- **Autumn**—autumn fashion, autumn clothes, autumn style, autumn look, autumn clothing
- **Christmas**—advent, christmas, christmas eve, midnight mass, gift exchange, secret santa, white elephant, office holiday party, nativity, ugly sweater party, tree lighting, christmas show, christmas gift, christmas present, christmas idea, christmas party, christmas lights, santa, reindeer, elves, north pole, presents, wrapping paper
- **Fashion week**—fashion week, new york fashion week, nyfw, milan fashion week, paris fashion week, london fashion week, mercedes benz fashion week, fashion week news
- **Glass Hair**—glass hair, glass style hair, glass hairstyle
- **Music Festivals**—music festival, festival style, austin city limits, bonnaroo, burning man, coachella, firefly, governors ball, lollapalooza, sxsw, south by south west, vans warped tour, voodoo, stagecoach, ultra, edc, tomorrowland, electronic zoo, mystery land, iheartradio, jazz fest, buckeye, panorama, gov ball, outside lands, bottleneck, best festival, festival camping, glastonbury
- **New Years**—new years day, new years eve, celebrate new year, january 1, new years party, new years celebration, new years decoration, ball drop, new years resolution, resolution idea, make resolution

- **Oscars**—oscar award, baftas, academy award
- **Spring**—spring fashion, spring clothes, spring style, spring look, spring clothing
- **Valentines**—valentine, valentines day, chocolate, edible arrangements, roses, flowers, bouquet, hallmark cards, cards, gifts, gift ideas, jewelry, candy, hearts candy, valentine gift, valentine idea, make valentine, give valentine, flower delivery

## LIFE MOMENTS

Reveal the pivotal moments in consumers' lives, from marriage to moving houses:

- **Meghan Markle Engagement**—meghan markle, prince harry, meghan and harry AND engaged, engagement, proposed, proposal

## SPORADIC MOMENTS

Tap into spontaneous and irregular moments that inspire action and intent, from surprise gifting to first dates:

- **Bargain**—bargain, deals, coupon, sale, discount, cheap, value, holiday sale, corporate discount, corporate rate, flea market, thrift store, price reduction, how to bargain, buy one get one, flash sale, clearance, voucher, coupon code
- **Boredom**—things to do, tired, feeling lazy, lacking drive, uninterested, boredom cures, boredom games
- **Chill/relaxation**—unplug, chill, relax, relaxation, relaxing music, lounging, lounge, yoga, massage, spa, candle, reading, napping, resting, relaxation techniques for anxiety, relaxation techniques for sleep, relaxation exercises, meditation, meditate, unwind, calm down, relaxing activity
- **Convenience**—convenience store, local shopping, easily accessible, effortless, close by, convenient parking, convenient timing
- **Decision-making**—comparison shop, comparison shopping, hotel options, flight options, best tech, best product, best of list, best phone, best computer, best car, best rates, consumer reports, product reviews, hotel reviews, car reviews, electronic reviews, reviews, best rated, top rated, best restaurant, best food, compare
- **Dinner Out**—dinner out, dinner, dinner reservation, get reservation, opentable, restaurant ideas, best restaurant, best date night restaurant, best food nearby, dinner ideas, romantic restaurants, cheap restaurants, nice restaurants, yelp, open table, restaurant reviews, top restaurants, italian food, mexican food, japanese food, fusion food, american food, fast food, restaurant near me
- **Summer Holiday**—summer holiday, summer vacation
- **Treat Yourself**—treat yourself, spa day, manicure, pedicure, hair highlights, no kids, new suit, new dress, new sunglasses, breakfast in bed, staycation, mental health day, spa holiday, personal day

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# POWERING DECISIONS GLOBALLY THROUGH SEARCH INTELLIGENCE

Captify's unique Semantic Technology analyses billions of searches to power media & insights across all channels and on every device.

Search Intelligence reveals red-hot intent signals, consumer interests, real-life moments and macro world trends like no other data source.

Captify's actionable insights play a crucial role in powering media & marketing strategies for over 700 top global brands and agencies.

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A blurred city street at night with warm lights and a person's shoulder in the foreground.

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