

# HAIR HEALTH REVOLUTION: WHAT CONSUMERS WANT

Beauty Accelerate – Los Angeles, CA – March 7, 2024



theBenchmarkingCompany



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# About Us

The Benchmarking Company (TBC) is an award-winning bi-coastal consumer research firm that delivers need-to-know information about the beauty, personal care and wellness buyer. Whether it's through our popular consumer in-home use testing, utilizing our 250K+ nationwide panelists, quantitative online surveys, intimate focus groups, or pilot testing programs, The Benchmarking Company's multidisciplinary and focused approach to uncovering consumer buying behavior helps our clients sell-in and sell more by capturing new customers and retaining current customers.

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# TBC Conducts Research For Inspired Brands





# What We Will Cover Today

1. Her Hair Issues & Regimen
2. Purchase Patterns
3. Brands She Uses
4. What's New & Exciting
5. Scalp Health
6. Where She Learns about Brands
7. Claims & Motivations
8. Takeaways of Note

## Methodology

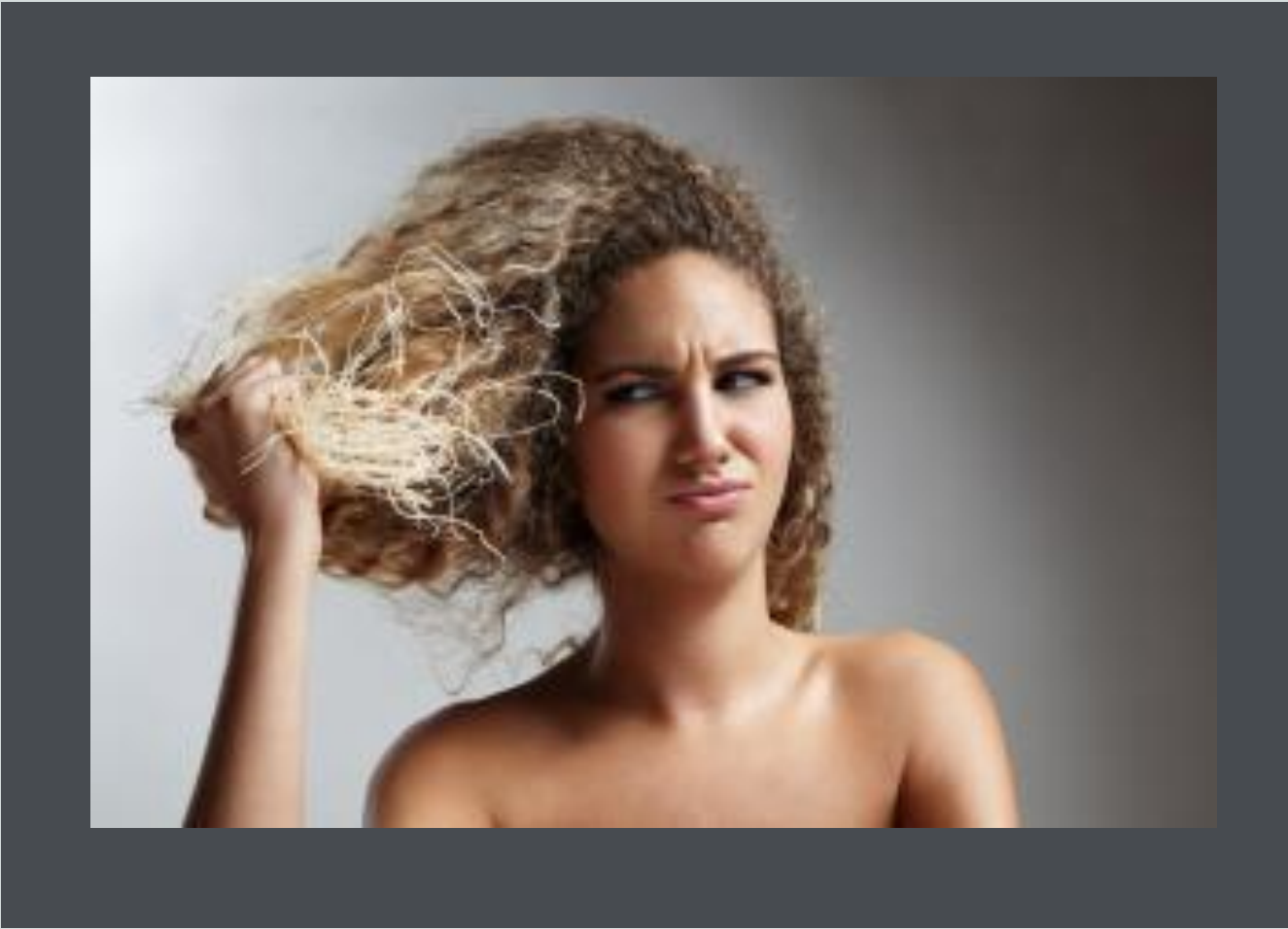
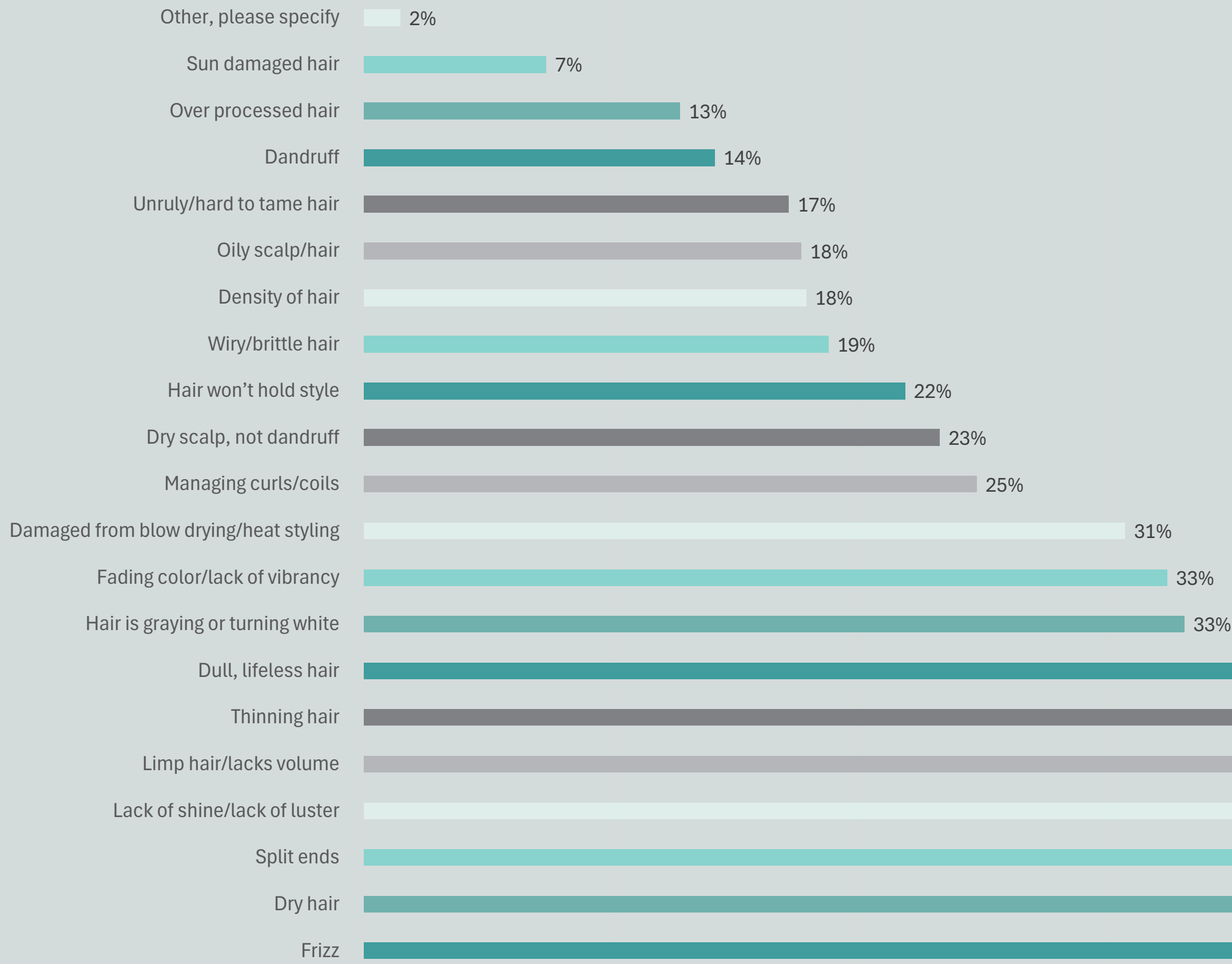
TBC created online surveys designed to explore consumer trends related to hair care and scalp care. The studies explored purchase intent, influencers, attitudes and personal values that would drive her to purchase products in these categories. Two (2) survey instruments with 68+ questions were developed consisting of psychometric and demographic questions. The margin of error for an online survey of this sample size is +/- 5% and assumes a 95% level of confidence.

## Research Scope

- More than 4,000 US Female beauty buyers
- Ages: 18+
- Must have purchased hair care products for themselves in past 6 months
- Online Fielding – May 2023 (scalp), and February 2024 (hair care)



# Frizz, Hydration, Volume Regularly Top Concerns



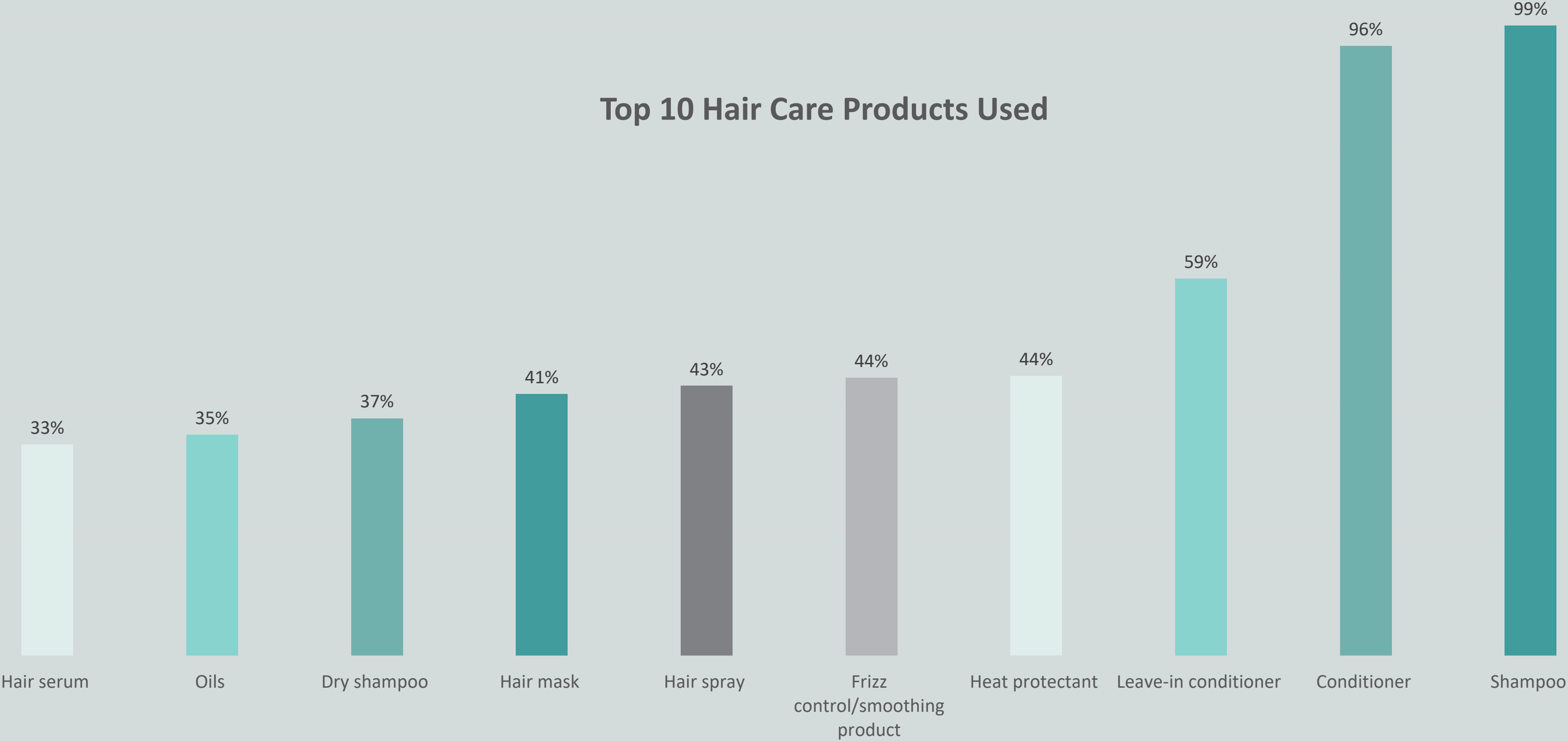
99% - Have Hair Concerns

Brand Opportunity

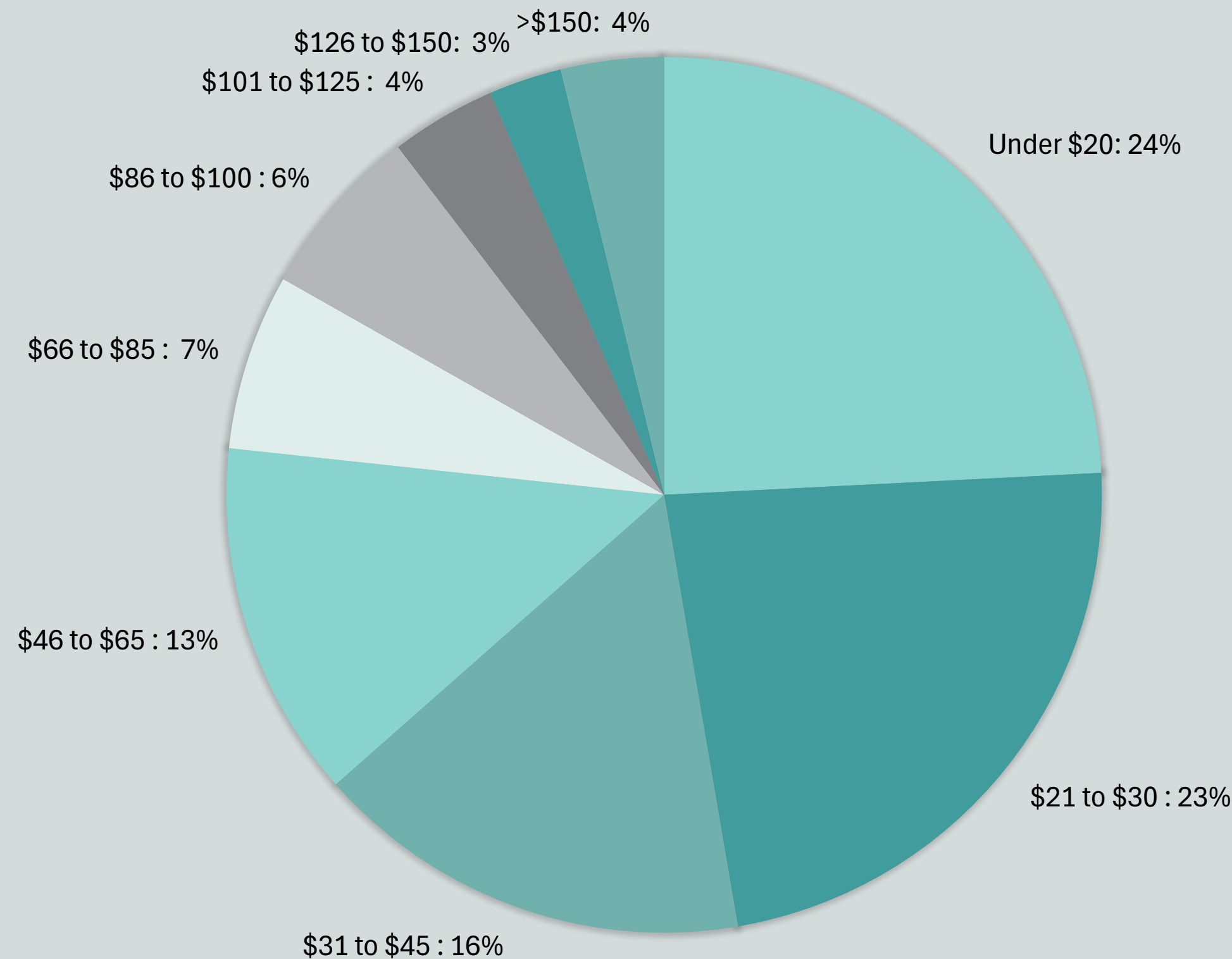
1% - I don't have any hair concerns

# What She's Using

Top 10 Hair Care Products Used

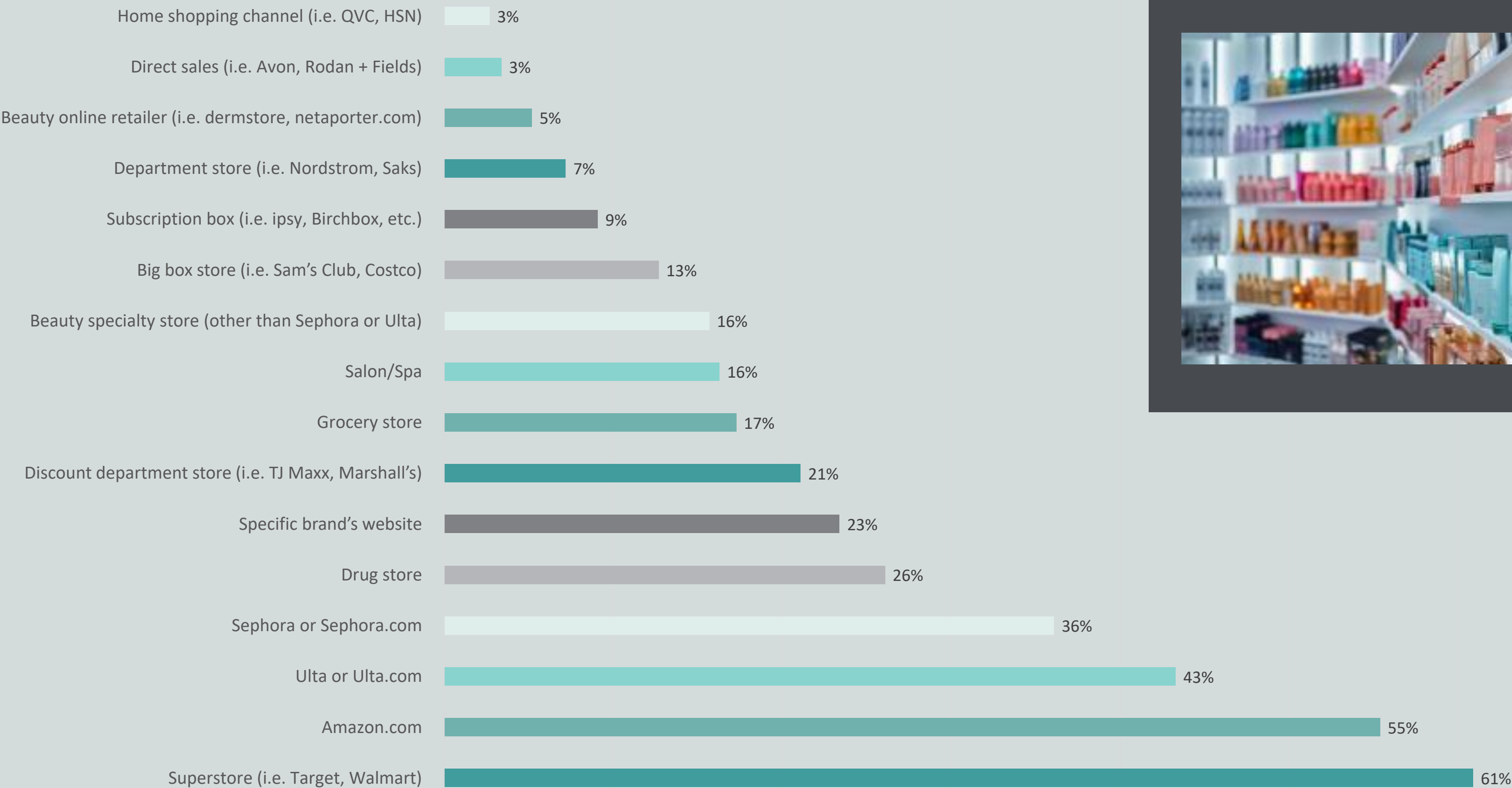


# Her Typical Monthly Spend on Products



**2.6**  
Average number of  
shampoo and  
conditioner bottles in  
her shower

# Where She Buys Hair Care Products

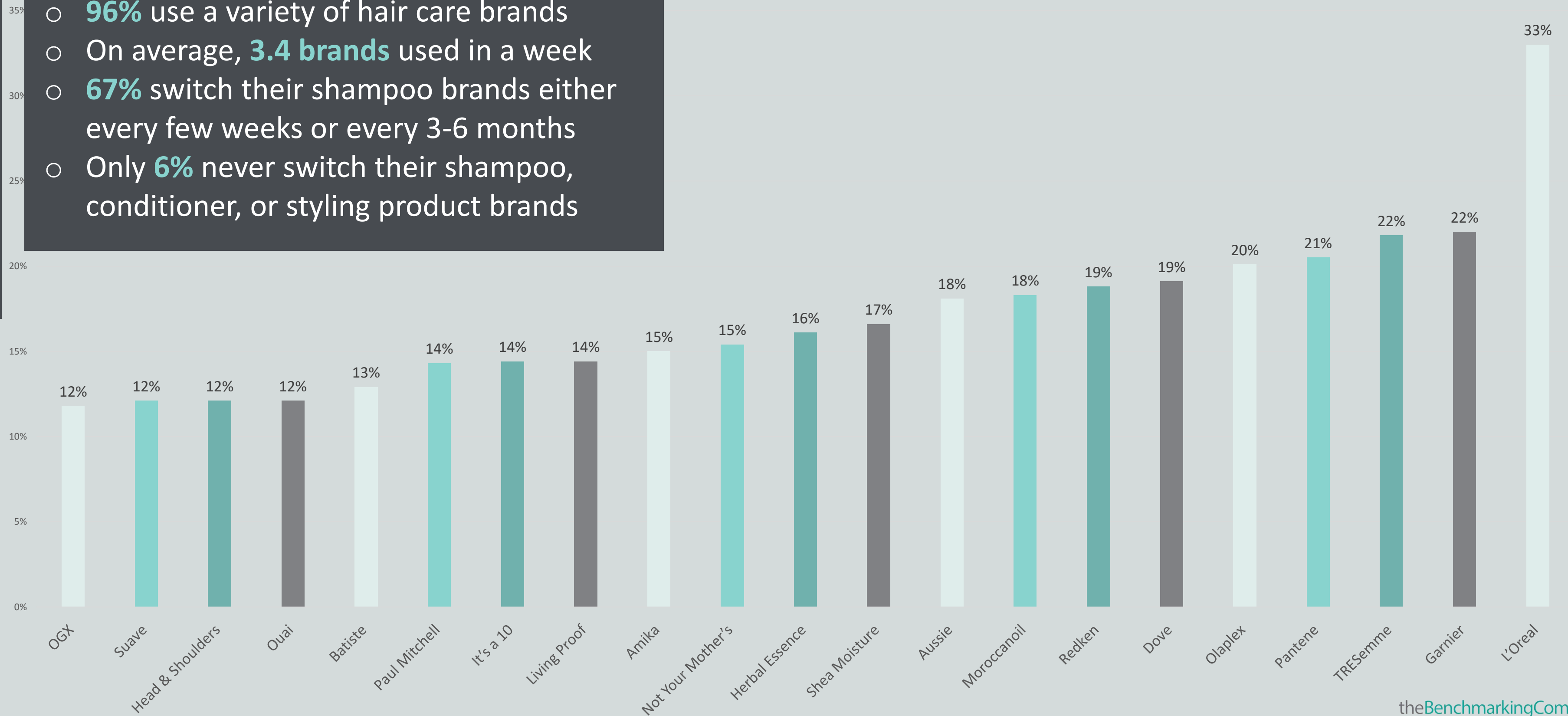




# Brand Loyalty? What's That?

- 96% use a variety of hair care brands
- On average, 3.4 brands used in a week
- 67% switch their shampoo brands either every few weeks or every 3-6 months
- Only 6% never switch their shampoo, conditioner, or styling product brands

Top 20 Brands She Uses



# Hair Care: Home vs. Salon

|                              | Home | Salon |
|------------------------------|------|-------|
| Colored/Highlighted my hair  | 38%  | 29%   |
| Touched up my roots          | 32%  | 19%   |
| Cut/trimmed my hair          | 29%  | 61%   |
| Scalp treatment              | 20%  | 7%    |
| Keratin treatment            | 10%  | 8%    |
| Professional blowout         | 7%   | 28%   |
| Hair chemically straightened | 4%   | 4%    |
| Permed my hair               | 3%   | 5%    |



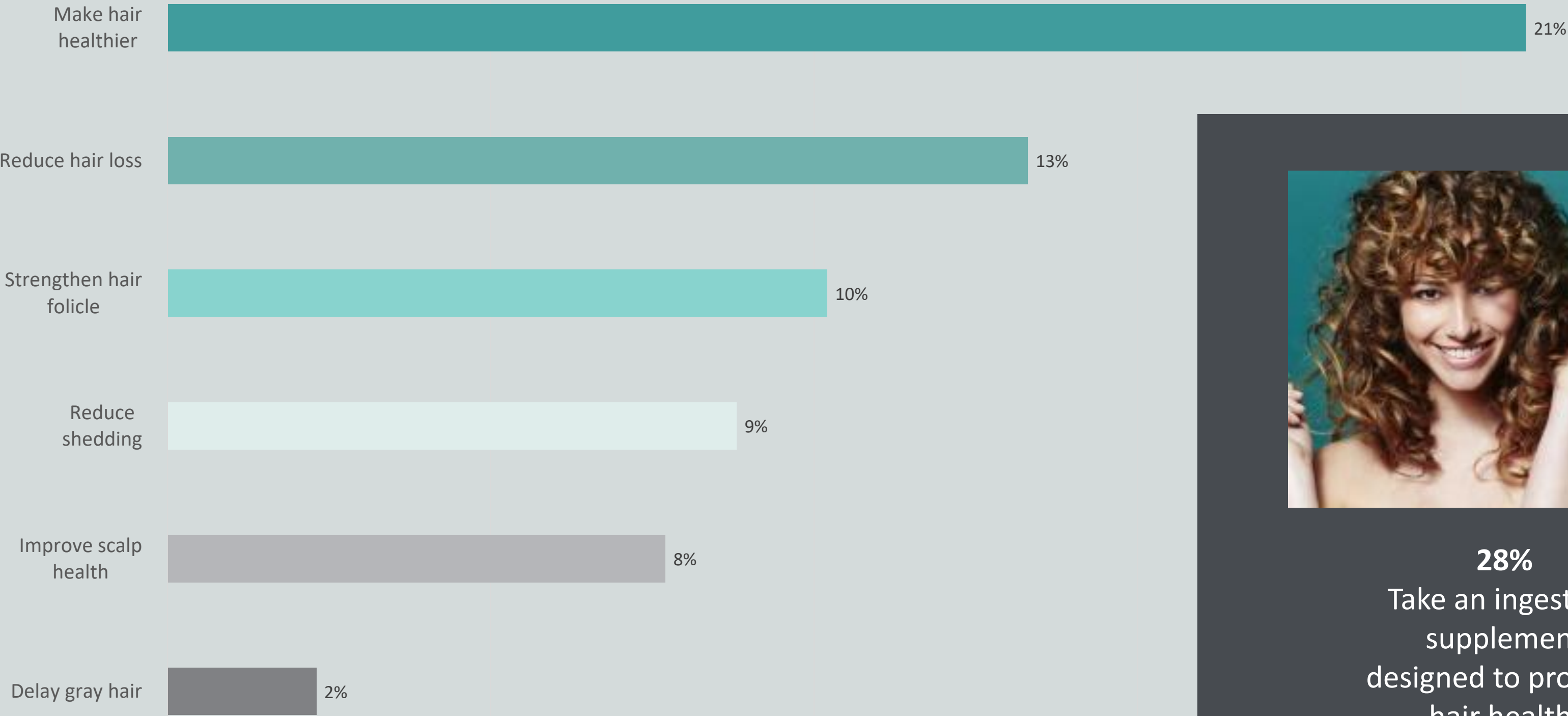


# Looking Ahead – Hair Care Product Opportunities

| Hair Care Products Specifically Designed for.... | Use Now | Don't Use But Would Like to Try |
|--|---------|---------------------------------|
| Life Stage (Menopause, etc.)                     | 18%     | 63%                             |
| Lifestyle (active/sports, etc.)                  | 19%     | 54%                             |
| Ethnicity  | 29%     | 46%                             |
| Hair Color (color depositing shampoo, etc.)      | 44%     | 40%                             |
| Hair Type (for curly hair, etc.)                 | 68%     | 25%                             |
| Hair Texture (frizz control for fine hair, etc.) | 76%     | 20%                             |

Brand Opportunity

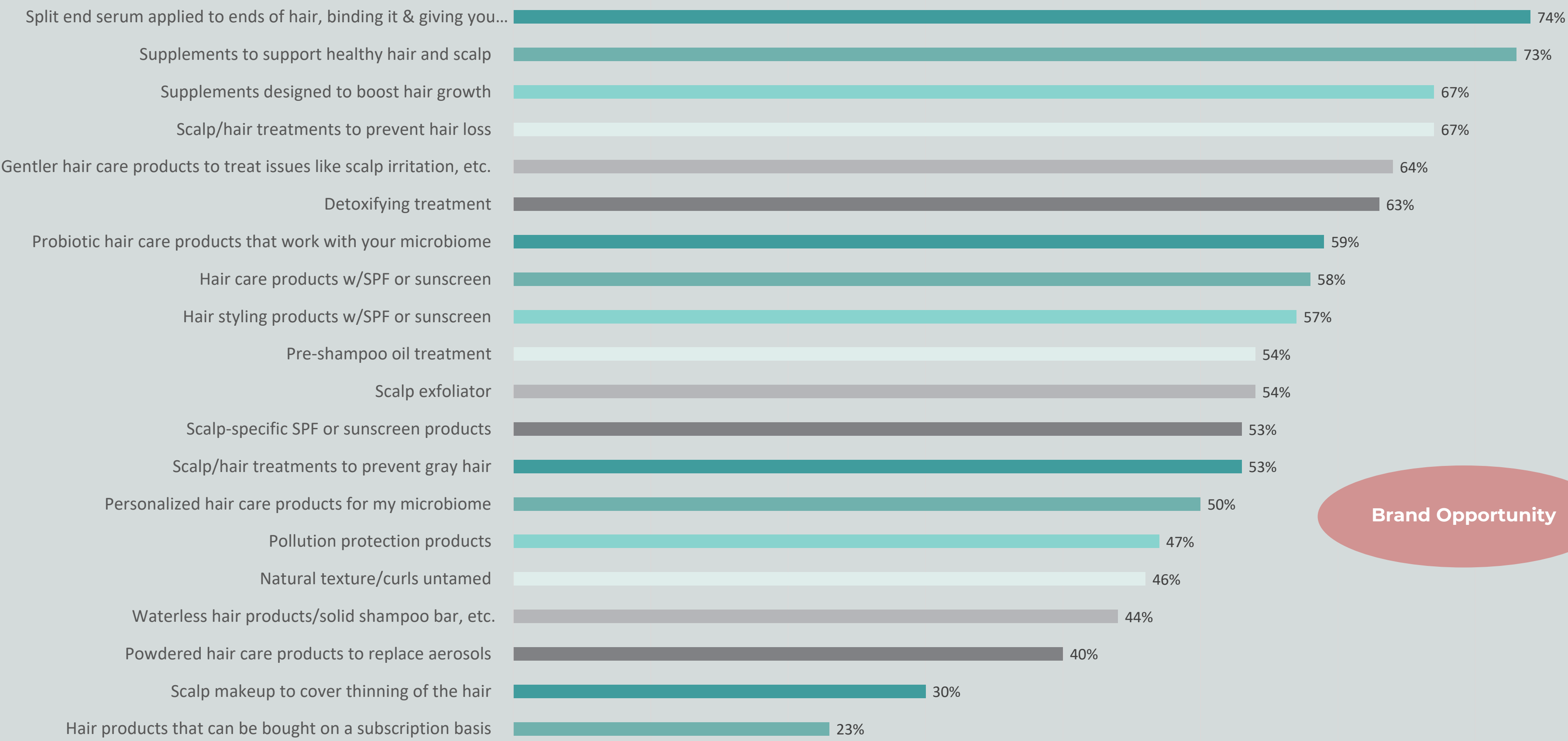
# Supplements to Promote Hair Health



**28%**  
Take an ingestible  
supplement  
designed to promote  
hair health.



# Hair Care Product and Treatment Trends of Interest



Brand Opportunity

# Scalp Care Specifics

- **99%** believe that hair health can be impacted by stress, nutrition and underlying health issues
- **98%** agree healthy looking and feeling hair begins with the health of your scalp
- **96%** believe it's just as important to care for your scalp as your facial skin
- **62%** use more than three products daily to improve or maintain hair health

Women report suffering a range of scalp conditions:

- Itchy scalp - **42%**
- Dry scalp - **23%**
- Dandruff - **14%**
- Oily scalp - **18%**

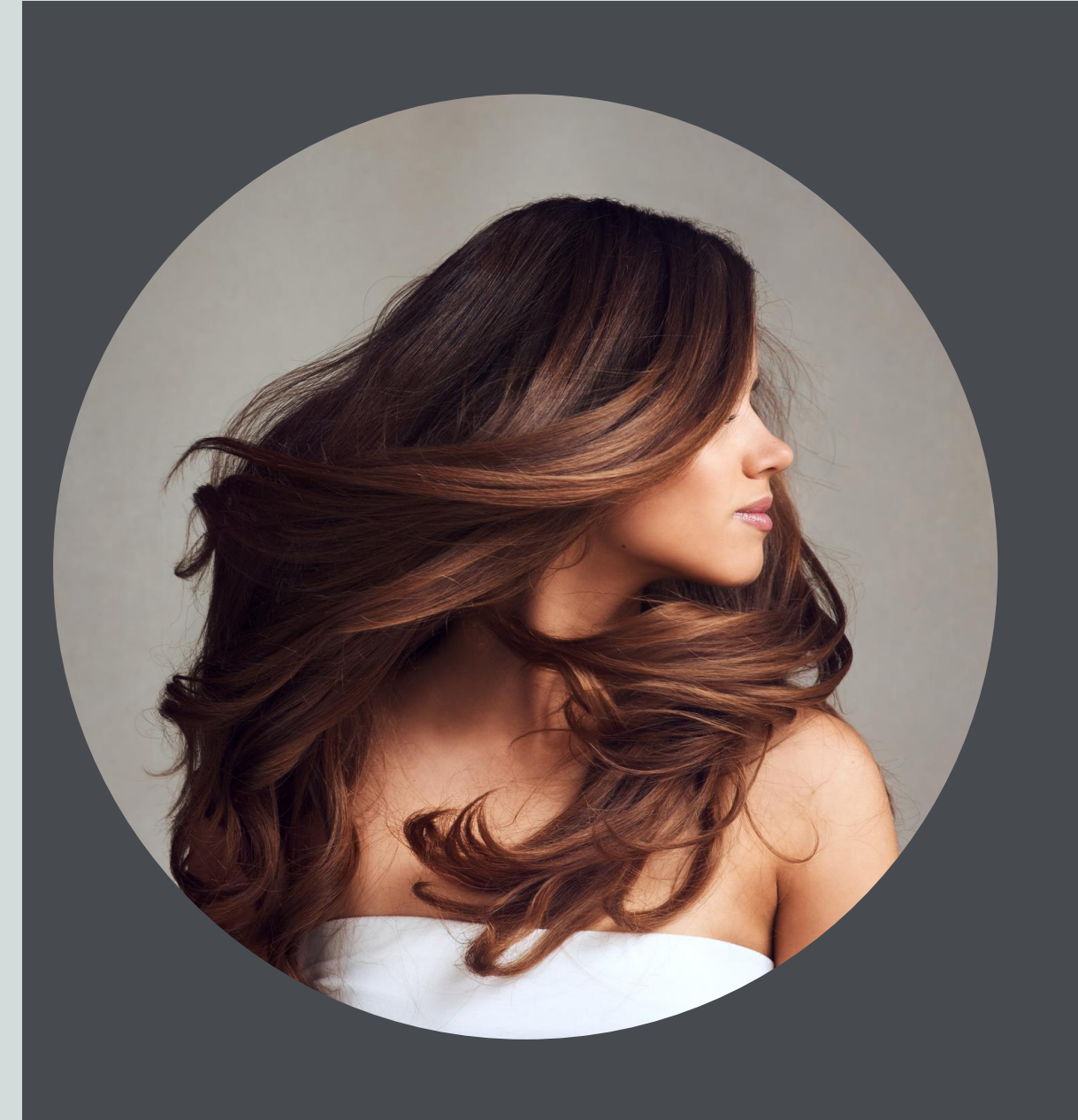
The global hair and scalp care market is valued at \$80.1B in 2021 and is expected to grow at a compound annual growth rate of 6.6% from 2021 to 2028. - Grandview Research





# What She's Using

| Scalp Treatments            | Currently Use | Would Like to Use |
|-----------------------------|---------------|-------------------|
| Calming Treatment           | 5%            | 72%               |
| Scalp Serum                 | 10%           | 70%               |
| Scalp Detox Treatment       | 7%            | 70%               |
| Scalp Cleanser              | 15%           | 69%               |
| Scalp Tonic                 | 4%            | 68%               |
| Hair Growth Scalp Treatment | 10%           | 67%               |
| Soothing Serum              | 16%           | 67%               |



**Brand Opportunity**



# Scalp Care Go-To's

Brand Favorites (scalp massagers also rated highly)

**#1 Head & Shoulders**

**#2 Ouai**

**#3 Briogeo**

**#4 L'Oréal**

**#5 Olaplex**



# Learning about Hair Care and Scalp Care Products

## Gen-Z:

- **49%** In a store
- **46%** TikTok influencer/celeb ad
- **35%** Friend/family member
- **31%** Instagram influencer/celeb ad
- **28%** TikTok brand video/how-to

## Everyone else:

- **45%** In-store
- **35%** Friend/family member
- **32%** Hair stylist
- **24%** A brand's own website
- **23%** Sample received in-store



# Top Buying Influencers (other than price)

## Gen-Z:

- **66%** Clear benefits statements on package (what will it do for me?)
- **53%** Lots of proof the product works: consumer claims, clinical claims
- **29%** Free sample
- **26%** Education on what product does, concern it addresses
- **22%** Before & Afters

## Everyone else:

- **60%** Clear benefit statements on package
- **46%** Free sample
- **45%** Lots of proof the product works
- **21%** Before & Afters
- **20%** Stylist recommendation/smell of the product





# Claims She Looks For On Package, Social, Ads, POS, etc.

1. Healthier Hair
2. Hydration/Conditioning
3. Frizz Control/Elimination
4. Shine
5. Volume
6. Damage Repair
7. Stronger Hair
8. Reduction in Split Ends
9. Thicker Hair
10. Healthy Scalp

*"After two weeks of use, 89% of users said their hair was visibly less frizzy."*

*"97% of women said their hair looked and felt healthier in just one week."*

## RESULTS

91% said treatment removed unwanted brassiness\*

86% said hair looks brighter and more vibrant\*

85% said hair looks visibly healthier\*

80% said hair feels less brittle and looks less damaged\*

\*Based on a consumer-panel survey of 104 women after two uses.

UP TO  
**91%**

SAID HAIR LOOKED  
REPAIRED.\*\*

UP TO  
**94%**

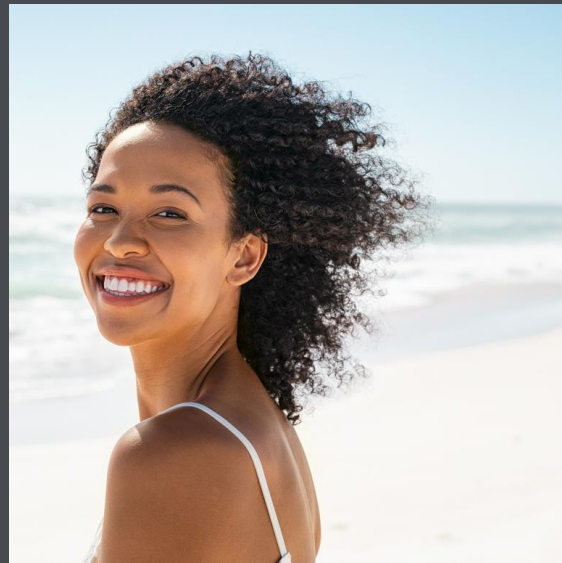
SAID HAIR FELT MORE  
MANAGEABLE AFTER ONE  
USE.\*\*

### Special Stats:

- 94% said scalp feels less itchy\*
- 90% experienced less dandruff\*
- 88% said scalp feels deeply hydrated instead of dry\*
- 83% said scalp feels healthier\*
- 80% felt their damaged hair looks healthier\*

\*Based on a 42 day independent consumer study with 48 participants





# Brand Takeaways

**So many issues, so little loyalty.** But there is room in her powder room for your hair care brand.

**Opportunity** abounds. Make it personal.

**Social media** strength and consistency.


## Prove it!

- Consumer Claims/independent studies
- Before & Afters
- Product Reviews
- Clinicals



# Contact Us

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