SPATE

FEBRUARY 2023

HAIR CARE TRENDS REPORT

NEITHER HAIR NOR THERE

Though it's true that interest in hair care has been on the decline over the last few months, this massive category — 9.9 million average monthly searches to be exact — deserves a deep dive. As consumer confidence has taken a hit thanks to the economy, now is the time to explore categories that are still demonstrating search volume growth.

Right now, consumers are craving treatment-focused products for scalp and hair shaft. Furthermore, the absence of growth across basic categories — think your classic, everyday shampoo and conditioner combos — shows us that consumers aren't trying to experiment with the basics right now. This is another sign of economic turmoil *and* a reminder to brands that the best way to keep consumer focus right now is to: (1) focus on customer retention across those classic products, and (2) use targeted treatments to attract new customers.

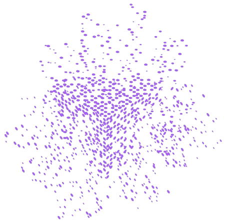
Have questions? **Sign up for a free trial of the Spate dashboard** to get your questions answered.

Thank you,

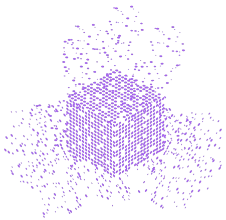
Olivier and Yarden, co-founders of Spate

METHODOLOGY

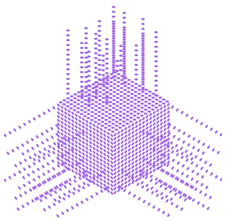
At Spate, we analyze over 20 billion search signals to identify which beauty products are most top of mind for consumers. **Why search data?** Every time a user types a query into the search bar, they are sharing what is top of mind for them — often including concerns, questions, and context they might not share elsewhere. Spate captures billions of queries that project an unbiased lens on *real* consumer behaviors and needs.



+20BN beauty related search signals in the US



Unsupervised machine learning to identify clusters



Trends classification for insights and implications

THE METRICS: DATA TRANSLATION

- *Volume:*
  Monthly search volume averaged over the last 12 months

- *Increase:*
  The difference in the average search volume of the past 12 months and the average of the previous 12 months

- *YoY:*
  Year-over-Year growth rate comparing the latest 12 months vs. previous 12 months growth rate

HAIR CARE PRODUCTS RANKED BY INCREASE

Hair care product trends driving the biggest positive change in search volume within the category:

Product	Volume	Increase ↓	YOY
scalp treatment	296.9K	**+30.1K**	+11.0%
hair oil	1.3M	**+16.4K**	+1.0%
clarifying shampoo	146.4K	**+15.5K**	+12.0%
ketoconazole shampoo	81.4K	**+12.8K**	+19.0%
shampoo bar	114.2K	**+10.6K**	+10.0%
hair growth oil	334.6K	**+8.8K**	+3.0%
glitter hair spray	20.4K	**+8.8K**	+76.0%
lice shampoo	40.1K	**+7.6K**	+24.0%
hair serum	177.5K	**+6.5K**	+4.0%
lice comb	28.8K	**+5.1K**	+22.0%

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending December 2022 vs the 12 months prior (US).

HAIR CARE PRODUCTS RANKED BY GROWTH

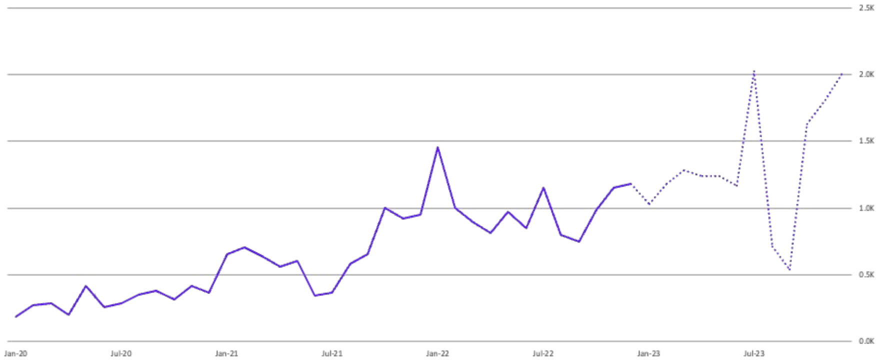
Hair care product trends experiencing the strongest growth over the last 12 months, compared to the 12 months prior:

Product	Volume	Increase	YOY ↓
hair slugging	5.9K	+4.2K	**+259.0%**
glitter hair spray	20.4K	+8.8K	**+76.0%**
scalp serum	5.2K	+2.2K	**+71.0%**
bonding oil	2.4K	+813	**+50.0%**
dry shampoo powder	5.6K	+1.8K	**+46.0%**
color depositing mask	810	+236	**+41.0%**
hair loss serum	1.7K	+488	**+41.0%**
chlorine removal shampoo	3.8K	+1.1K	**+40.0%**
hair loss foam	10.9K	+3.1K	**+40.0%**
hair loss pills	10.8K	+2.9K	**+38.0%**

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending December 2022 vs the 12 months prior (US).

Photo: DALL-E

BONDING OIL



HOW BIG IS THIS TREND

Very Low Volume
24.5K average monthly searches

HOW COMPETITIVE IS THE SPACE?

Very High Competition
37.9K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders
1 Market Leaders

WILL IT LAST?

Very Likely

STATS:

+50.2%

YEAR-OVER-YEAR GROWTH

RELATED SEARCHES:

Purchases	**Volume↓**
review	**1.3K**
dupe	**260**
price	**70**
best	**50**

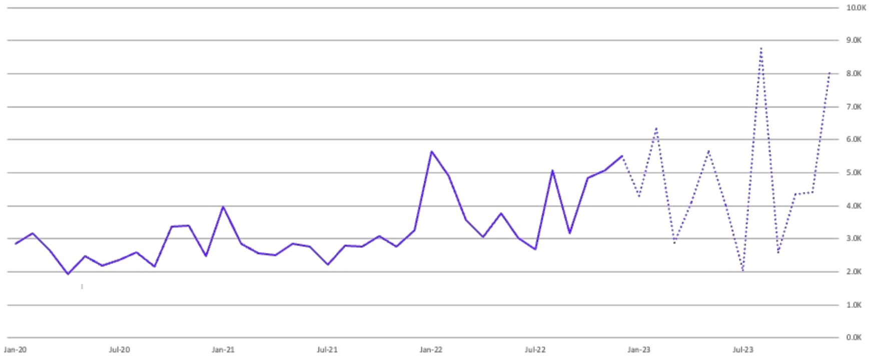
Questions	**Volume↓**
how to use	**4.4K**
what does	**650**
after	**390**
before	**390**
vs	**190**

Brands	**Volume↓**
olaplex	**36.3K**
curlsmith	**1.0K**
derma e	**260**
no7	**210**
moroccanoil	**160**

SPATE POV

Bonding oil is known for its ability to repair hair while also de-frizzing and adding shine. Popularized by Olaplex, this product category has impressive growth YoY. Searches for brands such as Curlsmith, Derma E reveal that consumers are starting to look outside of OG brand for a similar product. Some related searches alongside bonding oil such as *dupe* and *price* reveal consumers are concerned with the cost of this product and are searching for affordable options. The search query *vs* also supports the consumer desire to look for alternatives. Brands should use this data to create products that are effective and affordable for the consumers searching for this multifunctional product.

DRY SHAMPOO POWDER



HOW BIG IS THIS TREND

Low Volume
9.2K average monthly searches

HOW COMPETITIVE IS THE SPACE?

Medium Competition
3.4K average brand searches

WHO OWNS THE MARKET SHARE?

Several Market Leaders
9 Market Leaders

WILL IT LAST?

Likely

STATS:

+46.4%

YEAR-OVER-YEAR GROWTH

RELATED SEARCHES:

Benefits	Volume↓
volumizing	**80**
lift	**40**

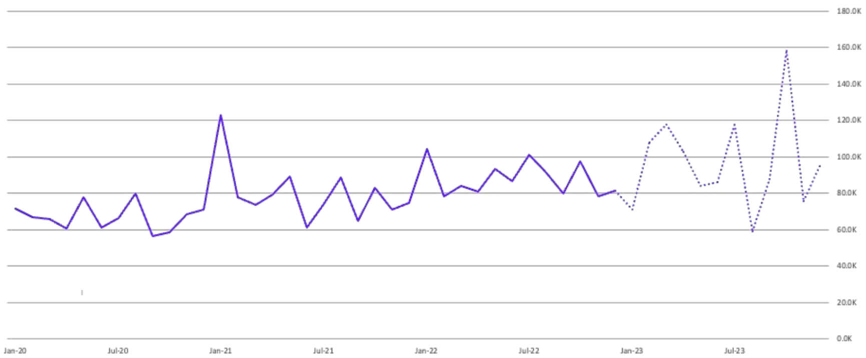
Ingredients	Volume↓
apple cider vinegar	**320**
Cocoa powder	**140**
arrowroot	**110**
charcoal	**90**
rice	**70**

Brands	Volume↓
kristin ess	**520**
oscar blandi	**480**
dphue	**430**
bumble and bumble	**400**
redken	**320**

SPATE POV

Dry shampoo — most often an aerosol product — helps to cover the appearance of oily hair; however, with a number of benzene-related aerosol recalls this year, offering this product in the increasingly popular powder format can minimize risk for brands. Dry shampoo powder is a modern product format that offers consumers the *volumizing* and *lifted* refresh they desire. Ingredients searched alongside dry shampoo powder such as *apple cider vinegar*, *cocoa powder*, and *arrowroot* reveal an opportunity for brands to market their products as ingredient-driven. Also, there's an obvious preference for more "natural" ingredients within this product category. Be sure to take this into consideration when developing newness.

SHAMPOO BAR



HOW BIG IS THIS TREND

Very High Volume
114.2K average monthly searches

HOW COMPETITIVE IS THE SPACE?

Very High Competition
40.5K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders
7 Market Leaders

WILL IT LAST?

Very Likely

STATS:

+10.3%

YEAR-OVER-YEAR GROWTH

RELATED SEARCHES:

Benefits	Volume↓
safe	**220**
anti dandruff	**210**
lightening	**200**
clarifying	**180**
volume	**60**

Concerns	Volume↓
dandruff	**1.7K**
without (lye)	**790**
oily	**630**
(safe for) colored hair	**340**
damage	**210**

SPATE POV

This concentrated shampoo product is a modern format attracting consumers. Concerns such as *dandruff*, *without (lye)*, *oily*, *(safe for) colored hair*, and *damage* showcase the kinds of opportunities for brands to develop or market products to these specific areas of concern. The benefits searched alongside shampoo bars further support top concerns associated with the product (ie, *anti dandruff* and *dandruff*), highlighting the clear wants and needs of consumers. Brands should use these insights to ensure they are giving consumers what they are searching for.

Brands	Volume↓
lush	**14.4K**
ethique beauty	**5.4K**
viori	**5.4K**
jr. liggett	**3.2K**
kitsch	**1.3K**

TOP INCREASE BRANDS IN HAIR CARE

Brands driving the biggest positive change in search volume across the hair care product category:

Brand	Volume	Increase ↓	YOY
k18	128.2K	**+42.1K**	+49.0%
nutrafol	113.5K	**+40.1K**	+55.0%
ouai haircare	138.8K	**+30.7K**	+28.0%
mielle organics	71.0K	**+25.8K**	+57.0%
routine	36.0K	**+19.0K**	+112.0%
monday haircare	36.6K	**+17.8K**	+94.0%
amika	83.7K	**+16.7K**	+25.0%
lolavie	33.8K	**+15.7K**	+87.0%
neutrogena	148.3K	**+12.4K**	+9.0%
divi	14.2K	**+12.1K**	+597.0%

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending December 2022 vs the 12 months prior (US).

TOP GROWTH BRANDS IN HAIR CARE

Brands driving the most significant growth across the hair care product category:

Brand	Volume	Increase	YOY ↓
divi	14.2K	+12.1K	**+597.0%**
jvn	10.5K	+8.1K	**+326.0%**
kitsch	1.3K	+918	**+241.0%**
summer's eve [as shampoo]	7.1K	+4.6K	**+191.0%**
roseglow	550	+349	**+173.0%**
owa haircare	880	+515	**+141.0%**
kyn	480	+262	**+120.0%**
arey grey	2.4K	+1.3K	**+116.0%**
routine	36.0K	+19.0K	**+112.0%**
elizabeth and james	760	+392	**+106.0%**

Source: Google Search data, average monthly search volume, average monthly search volume increase, and year-over-year growth comparing the past 12 months ending December 2022 vs the 12 months prior (US).

SPATE POV

Despite declining interest across hair — and beauty — as a whole, there are still significant opportunities for brands. Making an impact in unprecedented times requires a deep understanding of consumers' wants and needs. Use the insights provided to capture consumer interest in the coming months.

Consumers crave targeted treatments. From scalp treatments to hair growth oils, consumers are seeking out targeted therapies for a wealth of issues, from hair loss to dandruff. However, it's not only the medicated shampoos of yore they're after — though they're also in this cohort! Brands should be aware of trending products such as hair serum, hair oil, scalp serum, and bonding oil and how existing popular brands like those featured here are playing to consumer desires.

Squeaky clean tresses are top of mind. Searches for products like clarifying shampoo, shampoo bar, lice shampoo, and chlorine removal shampoo indicate consumers are looking for different cleansing products specifically for deep cleansing. Even brands without shampoos can capitalize on this trend by showing consumers how their products won't leave anything behind like harsh, drying chemicals or scalp build-up.

Consider what's not being searched. The fact that all the top increase and growth trends across the hair care space focus on targeted treatments or fancy final touches (ie, glitter hair spray) shows that consumers aren't currently trying to experiment with their basic routine. Brands should use this opportunity to double down on customer retention for their loyal customers, reminding them why they continue returning to their favorite classic shampoo-conditioner duo and more.

SPATE: A DATA DASHBOARD FOR THE BEAUTY INDUSTRY.

What's The Next Big Trend?

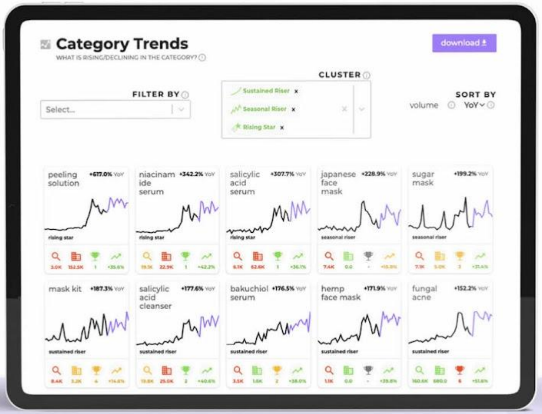
20+ billion signals in beauty and wellness to spot and predict which trends are here to stay.

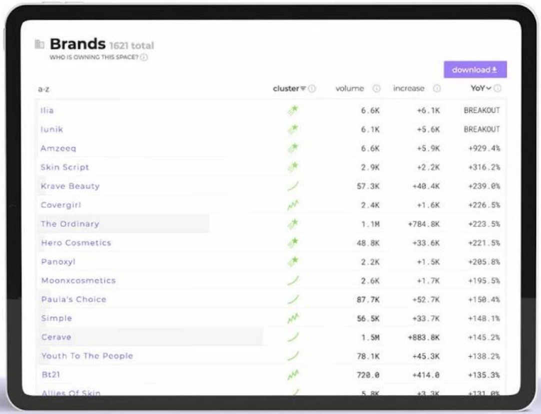
Which brands are owning the space?

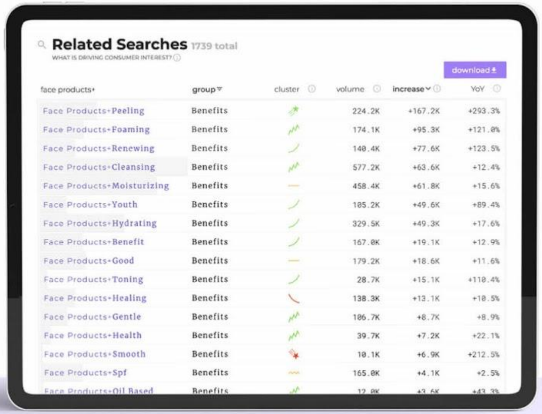
Measure level of competition within a space. Compare consumer interest across brands, including DTC.

How To Position A Product?

Contextual data to identify consumer needs (claims, concerns, ingredients) for messaging.

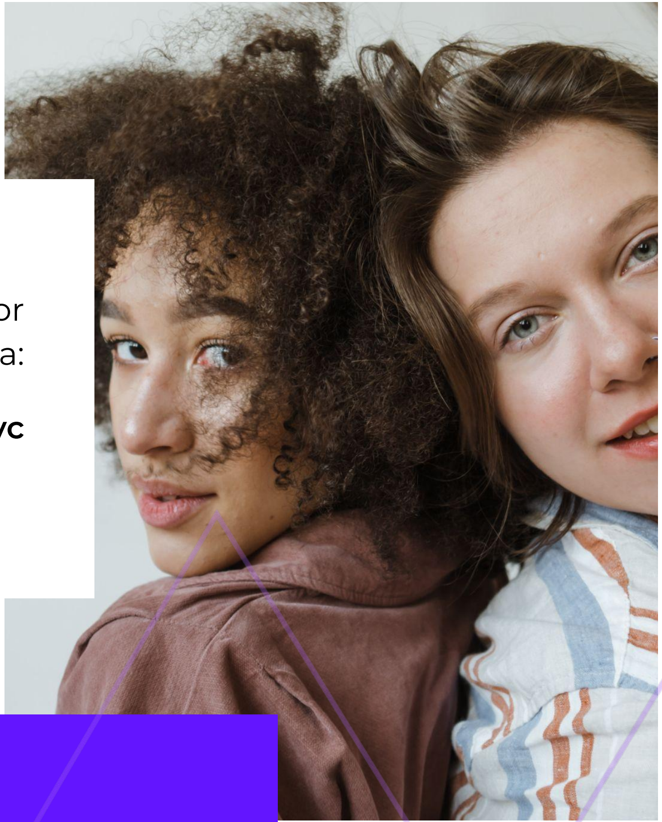






Explore the dashboard for
more hair care data:

www.spate.nyc



SPATE

HEALTH STATS EXPLAINED

HOW BIG IS THIS TREND

This metric assesses the size of a trend using monthly Search Volume relative to its category.

"Very High Volume" trends are well established trends among consumers.

"High Volume" trends are those with high consumer awareness.

"Medium Volume" trends are fairly well known by consumers.

"Low Volume" trends have low consumer awareness.

"Very Low Volume" trends represent emerging niche opportunities.

HOW COMPETITIVE IS THE SPACE?

This metric assesses how much of organic search are brands-related. It represents the top of mind brands that consumers search alongside a trend.

"Very Low / No Competition" indicates there are little to no brand searches alongside a trend.

"Low Competition" indicates that there are a few brand searches alongside a trend.

"Medium Competition" indicates that there are some brand searches alongside a trend.

"High Competition" indicates that there are several brand searches alongside a trend.

"Very High Competition" indicates there are many brand searches.

WHO OWNS THE MARKET SHARE?

This metric assesses the presence or lack thereof of a market leader.

"Very Few Market Leaders" indicates a market in which very few brands own >80% of the share.

"Few Market Leaders" indicates a market in which a few brands are in high competition.

"Several Market Leaders" indicates a market in which there are several brands in competition.

"Many Market Leaders" indicates a market for which there are many brands in competition but no clear winners.

"No Market Leaders" indicates a market for which there is either fierce competition or an emerging market with no distinct players.

WILL IT LAST?

This metric assesses the likelihood that a trend will continue to grow within the next 12 months.

"Very Likely" indicates a >90% confidence that a trend is predicted to grow.

"Likely" indicates with strong confidence that a trend is predicted to grow.

"Uncertain" indicates an equal likelihood that a trend is predicted to grow or decline.

"Unlikely" indicates with strong confidence that a trend is predicted to decline.

"Very Unlikely" indicates a >90% confidence that a trend is predicted to decline.