

A global consumer journey in scalp care

Chiara Degl’Innocenti, Loya Schoeffel, Emina Besic Gyenge, Stefan Hettwer, Brigit Suter, Barbara Obermayer - Rahn

The scalp is the base for good hair growth, which is one of the most distinctive trait of personal identity and style. Therefore, one should think that the scalp would be the first beneficiary of attention and care. This may have been the situation in ancient times when both Indians and Egyptians were using oils for massaging the scalp.¹

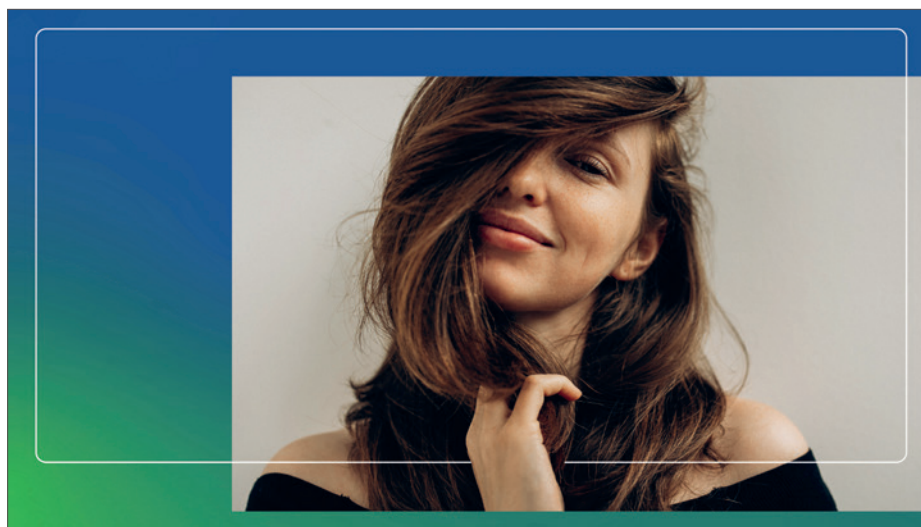
In recent decades, unfortunately, there has been less focus on this small but important part of the body. Indeed, scalp care is just now starting to establish itself in the hair care category and is gaining more importance on a global base. There is even a tendency in the market to create a full beauty routine dedicated to the scalp.

All this renewed interest is mainly due to a change in consumers’ needs. Consumers nowadays have an increasing interest for health and wellness, which is aligned with an increased interest for scalp care.²

For this reason, it is fundamental to identify the scalp benefit spaces and recognise regional consumer profiles to be able to create and market products that align with consumers’ needs and preferences.

Therefore, we have profiled four different consumer typologies based on a geographical categorization starting from Eastern markets and moving towards Western markets (China, Thailand, Europe with a stronger focus on Germany and UK and America) to better understand their needs.

This allows us to position our new active ingredient, Scalpinist®-Sensio, in a more effective and straight forward manner in the market. In this article, the four consumer profiles are illustrated



together with how this scalp care active can satisfy and match their priorities and needs.

The unique active ingredient designed for sensitive-oily scalp. Its novel and holistic approach aims to alleviate scalp discomfort within two weeks by restoring the balance to the disturbed microbiome and to reduce scalp sebum through a simple rinse-off application. The scalp care active is extracted from *Maclura cochinchinensis* leaves, which are rich in prenylated bioflavonoids.

Chinese consumers

In China, there has been a noticeable shift in hair trends and consumer preferences in recent

years. Indeed, men are moving away from crew cuts to short, straight hair that is more likely to involve the use of styling products.

While women’s hairstyles have remained relatively consistent, with the majority of women keeping straight mid-length hair. In terms of hair health, Chinese consumers are concerned about flatness, greasiness and hair fall.

On the other hand, Chinese consumers are increasingly seeking customised products based on specific skin, hair and scalp types. For this reason, there is particular interest in products that address scalp conditions – an extension of attitudes from facial skincare and colour cosmetics (Figure 1).

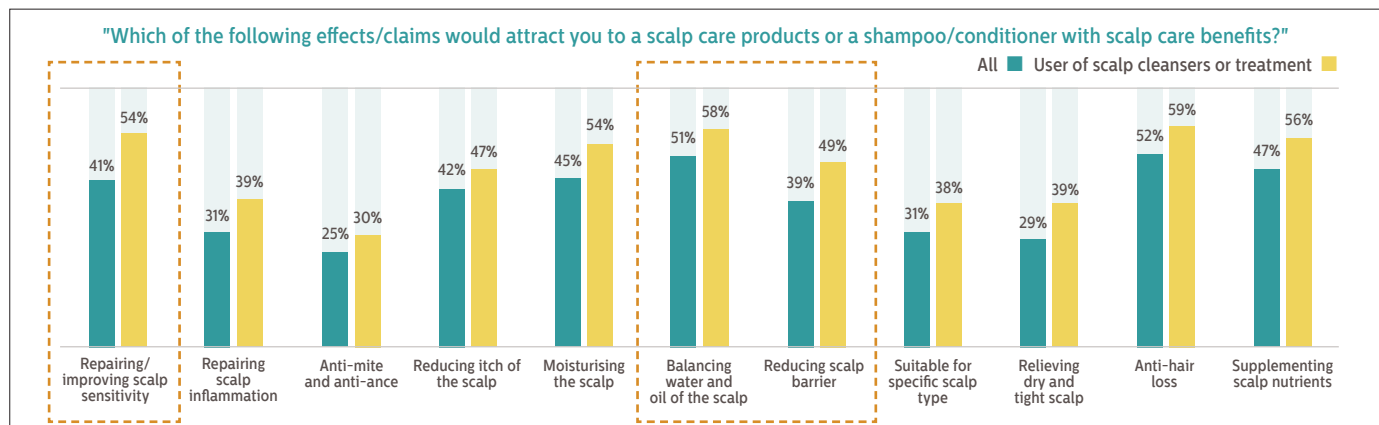


Figure 1: Survey results among Chinese consumers about their preference on product claims for scalp application products. The part highlighted with dotted lines refers to the claims deriving from the 'skinification' trend³

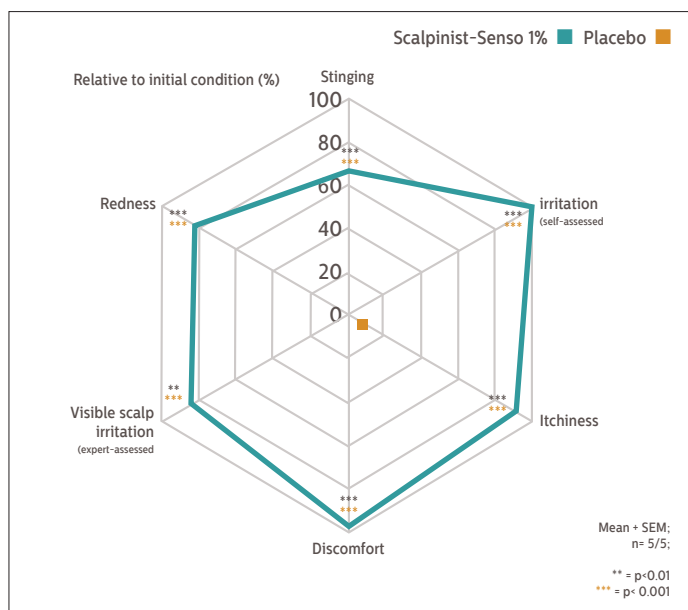


Figure 2: The scalp care active significantly soothes scalp discomfort. After 14 days, all sensory ratings were significantly improved. Parameters of ‘Stinging’, ‘Irritation’, ‘Itchiness’ and ‘Discomfort’ were self-assessed by the subjects, while ‘Redness’ and ‘Visible scalp irritation’ were graded by experts. Within the placebo group the scalp sensory ratings deteriorated compared to baseline and are therefore not represented here. An exception to this is the ‘Itchiness’ rating. Paired Student’s t-test

The scalp care active is exactly targeting the repairing/improving of scalp sensitivity and the balance of oily scalp. Furthermore, this product is part also of the category of the skinification trend: this substance is already in use in skin care applications.

From the *in vivo* study, in Figure 2, it is possible to see how consumers feel after the application of a leave-on tonic containing 1% scalp care active for two weeks. All the parameters characteristic of sensitive scalp, such as stinging, irritation, itchiness, discomfort, visible scalp irritation and redness have significantly improved compared to untreated and treated with placebo.

This demonstrates how the scalp care active is able to perfectly answer the requirements of Chinese consumers towards the new need of having products for scalp care, especially related to sensitive scalp.

TABLE 1: TABLE SHOWING THE CONSUMERS AGE OF THE MAJOR CONSUMERS GROUP WHO STATING HAVING OILY, DRY OR ITCHY SCALP⁴

Scalp issue	Age Group
Oily	39% among 35-44 years old
Dry	38% among 35-44 years old
Itchy	35% among 16-35 years old

Thai consumers

The demand for hair treatments has surged in Thailand, spurred by the fashion for styles achieved using chemical treatments and heat styling. This is true of both men and women and is due to the impact of South Korean trends and Western vintage hair styles on local tastes. This fashion has led to opportunities for products that address specific scalp issues, such as sensitivity and damage.

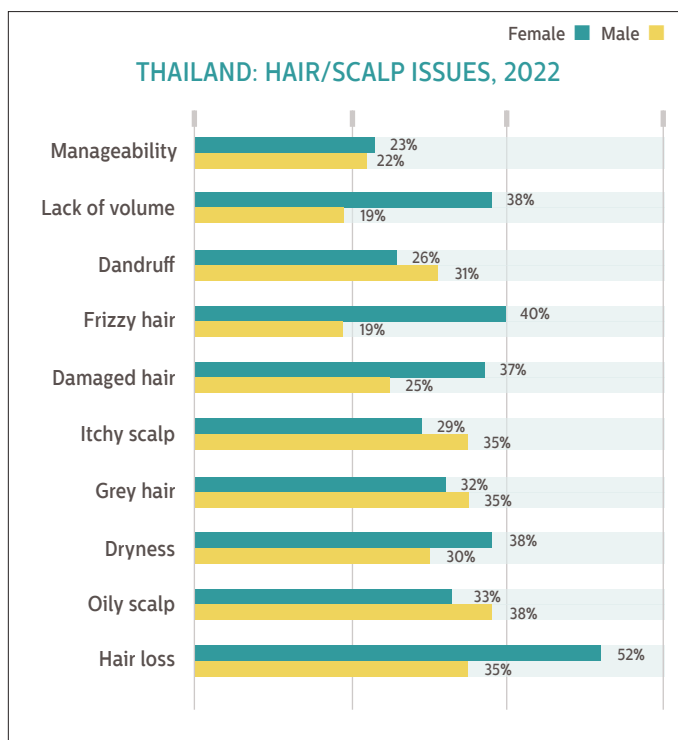


Figure 3: Survey result about hair and scalp issues among Thai consumers along 2022⁴

In Figure 3, the different hair and scalp issues among Thai consumers during 2022 are listed. The major concerns among women are hair loss, frizzy hair, lack of volume and dryness. While for men, it is hair loss, grey hair, oily and itchy scalp. In both consumer categories there is some interest for dry, itchy and oily scalp. This trend is particularly evident among millennials, which is illustrated in Table 1.

This group of consumers should be addressed especially with scalp products targeting sensitive scalp. For the scalp care active, the age of the consumer volunteers, who participated in the studies, varied quite widely and also included millennials in the study design.

Also from Figure 3 emerges a potential for products that claim to delay ageing and prevent or minimise hair loss. However, while treatments are in vogue, manufacturers should also

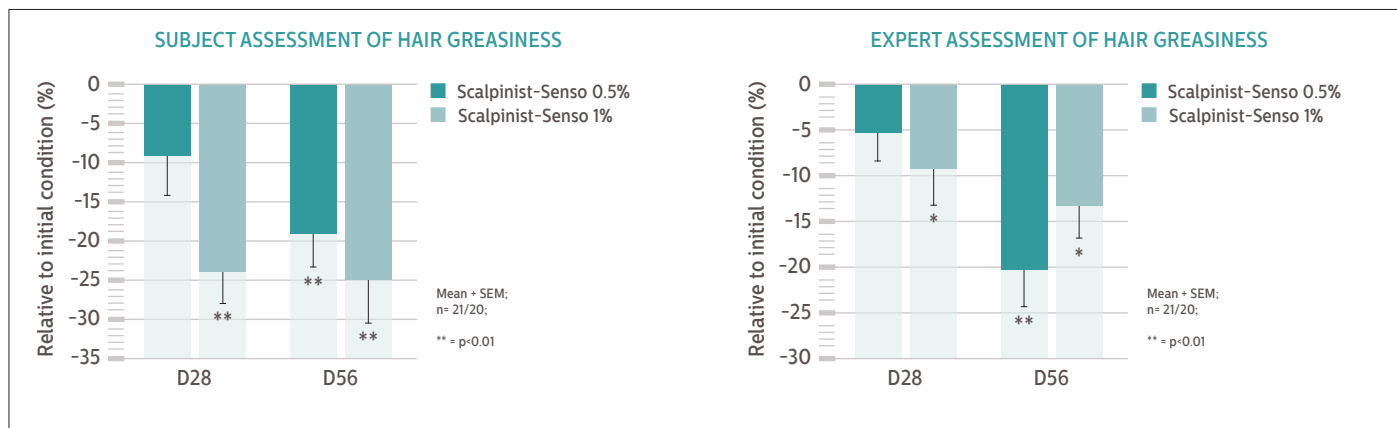


Figure 4: Subject assessment (left) confirms the perceptible hair greasiness reduction efficacy of the active. Subjects felt a significant improvement with both 0.5% and 1% of the scalp care active ingredient. On the right side is the expert assessment. Hair greasiness reduction was already decreased after 28 days and the time-dependent efficacy is confirmed by a further reduction after 56 days

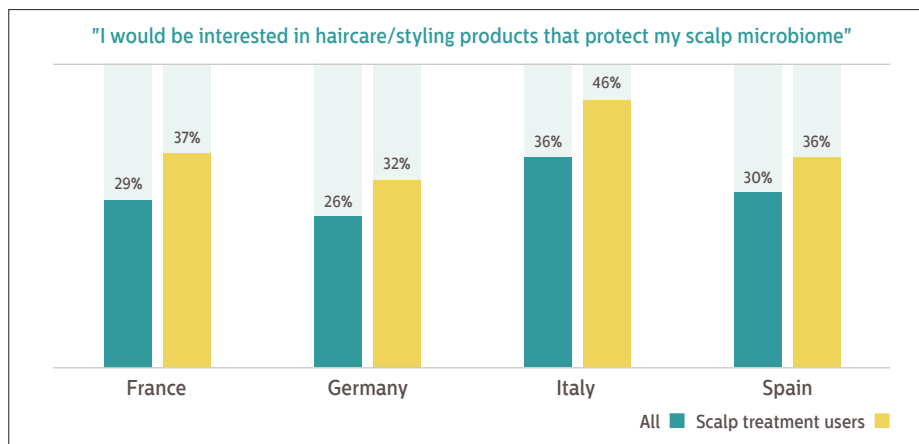


Figure 5: Survey result of consumer interest about product for the scalp microbiome protection

consider scalp cleansers, capable of removing styling and hair make-up products.

In this context, the scalp care active can help with the cleanser development because it has been tested in a rinse-off application with excellent results in oiliness reduction, both in self and expert assessments as visible in Figure 4.

European consumers

In general, European users of scalp treatments are more concerned than non-users about their scalp microbiome, indicating that they are already looking at specific elements of scalp care and scalp biology. In all markets, apart from France, interest in the microbiome peaks

among 16-24 year olds (Figure 5).

The scalp care active can balance the scalp microbiome, selectively inhibiting *Cutibacterium acnes*. Less than 1% of the active ingredient is effective against this unfavourable microorganism. The growth of *Staphylococcus epidermidis* is regulated only at higher concentrations than the recommended use level (0.5% - 1%) (Figure 6). These bacteria are, under normal circumstances, desirable for a healthy skin flora.

The European consumer analysis was done especially taking into consideration two main markets, the German and the UK. UK women with itchy, flaky scalps are the biggest users

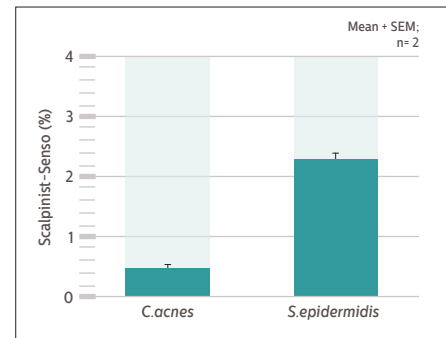


Figure 6: The scalp care active controls the growth of the skin microbiota. It prevents uncontrolled growth for *C. acnes*, the microorganism which overgrows when oily and sensitive scalp occurs

of scalp treatments and are most attracted to claims of long-lasting increase of hair growth and scalp microbiome health.

Women with oily scalps are the most attracted to lasting results, presumably oil control, while those with dry scalps want more hair growth. All of this visible in Figure 7.

On the other hand, a third of German women say they have a balanced or dry scalp, which opens opportunities for scalp products that promise long lasting benefits and care of the microbiome as visible in Figure 8.

American consumers

In contrast to Chinese consumers, half of

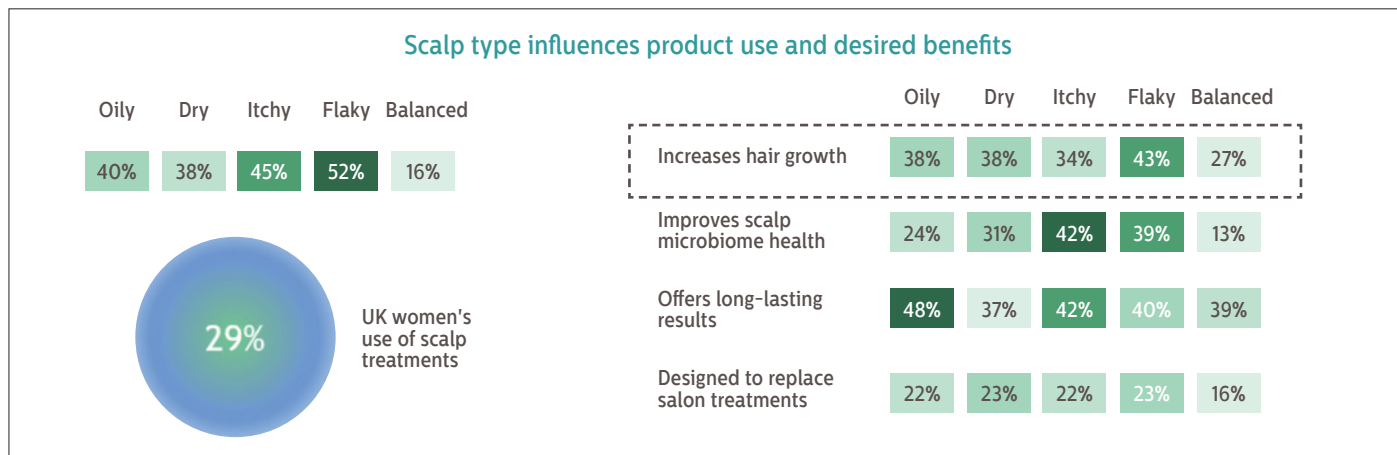


Figure 7: Survey results on UK women, who have a different scalp situation?

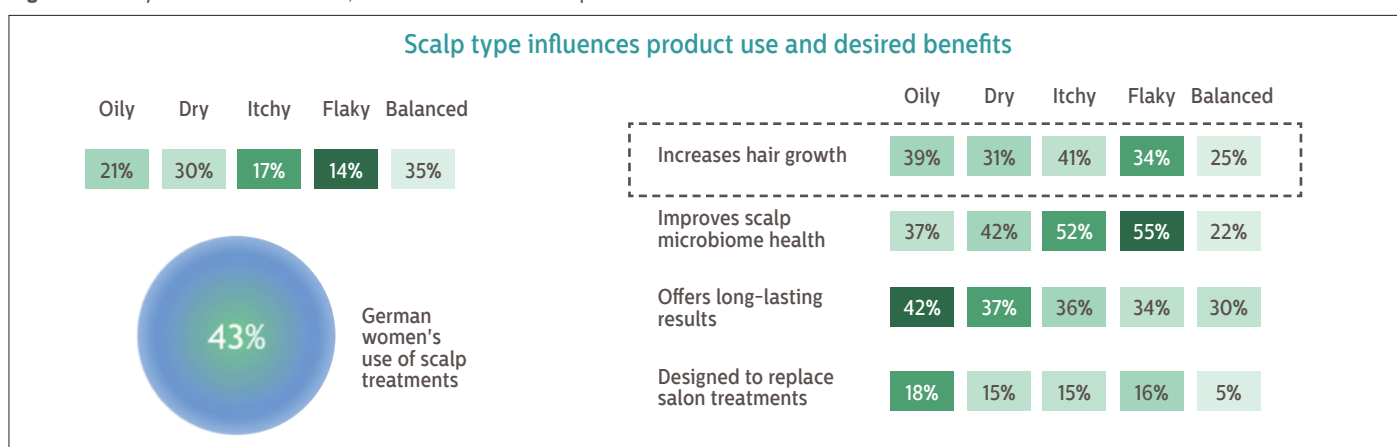


Figure 8: Survey results on German women, who have a different scalp situation?

American consumers use hair treatment, but the use of scalp treatment is still on a low level compared to the other product formats (Figure 9).

It is also possible to observe that when US consumers use hair treatments, they tend to turn to familiar, straightforward products such as hair oils. In contrast, skincare-inspired formats such as serums have been slow to gain market traction. However, it is notable that usage of scalp treatments, while slightly lower overall than serums, is uniform across men and women.

There is potential to attract both genders with products that claim to address sensitivity, dry scalps and/or hair loss.

In this context, the US market has not yet

matured for scalp care treatment and it can be a market where companies can focus on for the development of scalp care products addressing both women and men consumers.

Conclusion

Overall, it is possible to state that scalp care is building up around the globe, with some markets in a more advanced situation than others, showing that there are opportunities, which can be used by raw material producers and finished cosmetic products manufacturers for the development of products, which can fit the markets' requirements.

Another interesting aspect, that emerges

from this analysis, is that scalp care is not only related to women consumers, but it is also emerging for men.

Across all the considered countries, the main scalp issues are related to dryness, oiliness and itchiness, which push consumers to search for products that can relieve them from these discomforts. An extension of a well-nourished scalp is translated in an improvement in hair growth and hair thickness.

Scalpinist®-Senso, with its ability to inhibit the four factors, which are provoking the vicious circle of sensitive scalp, is therefore an active ingredient that can especially target a disbalanced scalp microbiota, an oily and sensitive scalp, providing a relief of the scalp discomfort.

The scalp care active is therefore an active ingredient, which we have designed to answer this rediscovery of the scalp as a part of the body, which also is in need of care, especially in a surrounding context in which personal health and wellbeing is highly looked after and pursued by the modern consumer. **PC**

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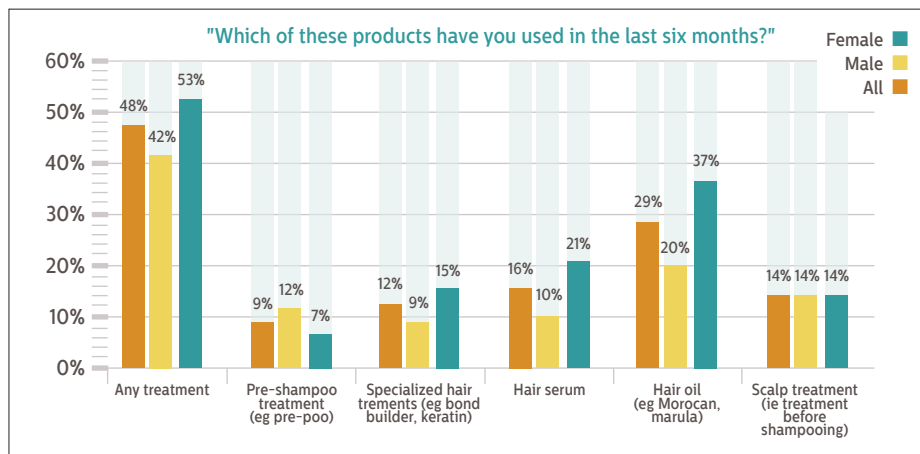


Figure 9: Survey result on American consumers about their habits of using hair care products