

think with Google

Beauty Trends 2015

HAIR CARE EDITION (U.S.)

Intro

With every query typed into a search bar, we are given a glimpse into user considerations or intentions. By compiling top searches, we are able to render a strong representation of the United States' population and gain insight into this specific population's behavior.

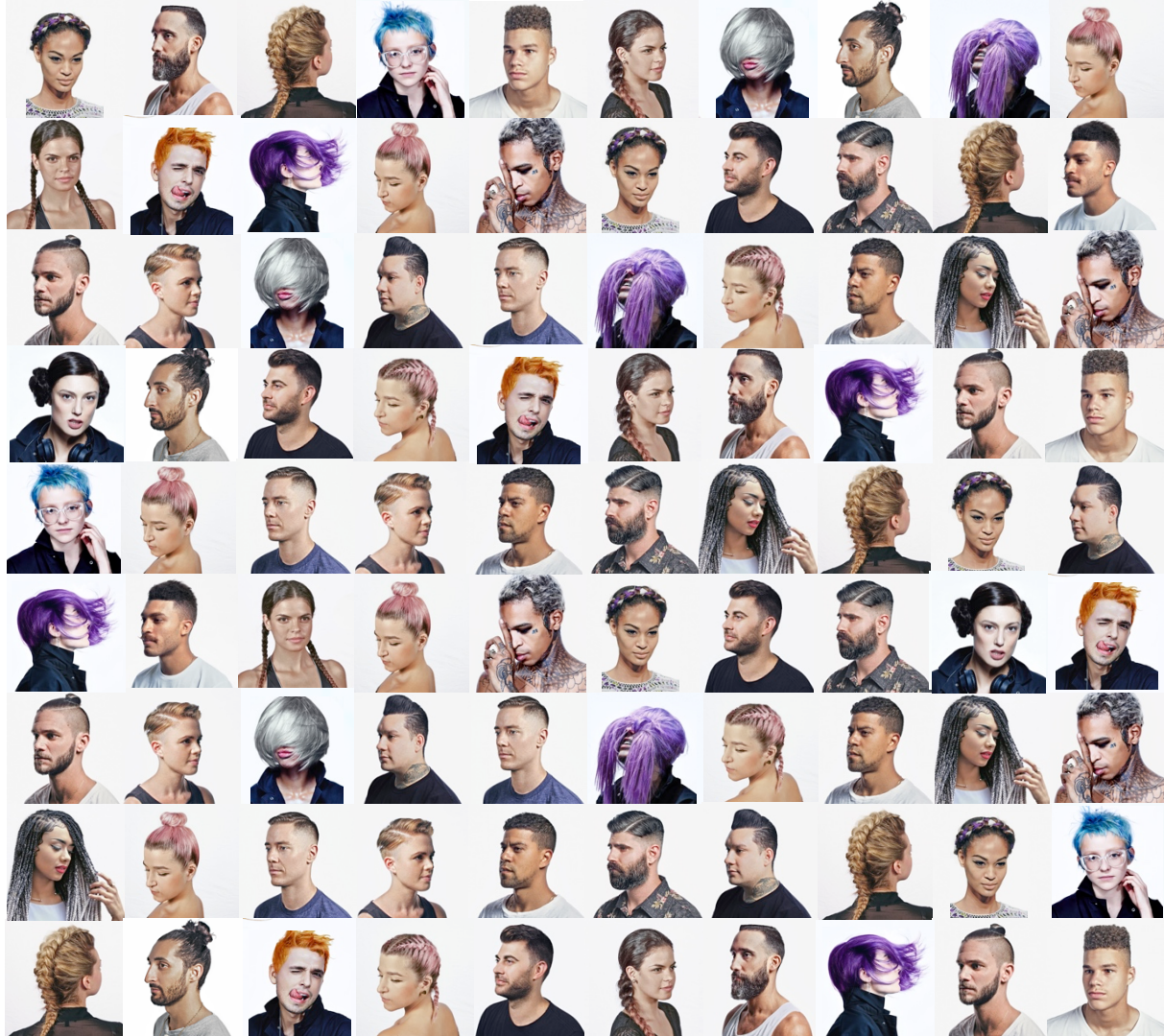
In our Google Beauty Trends report, we are excited to bring forth the power of big data into the hands of the marketers, product developers, stylists, trendsetters and tastemakers. The goal of this report is to share useful data for planning purposes accompanied by curated styles of what we believe can make for impactful trends.

We are proud to share this iteration and look forward to hearing back from you.

Flynn Matthews / Principal Industry Analyst, Beauty
Olivier Zimmer / Trends Data Scientist
Yarden Horwitz / Trends Brand Strategist

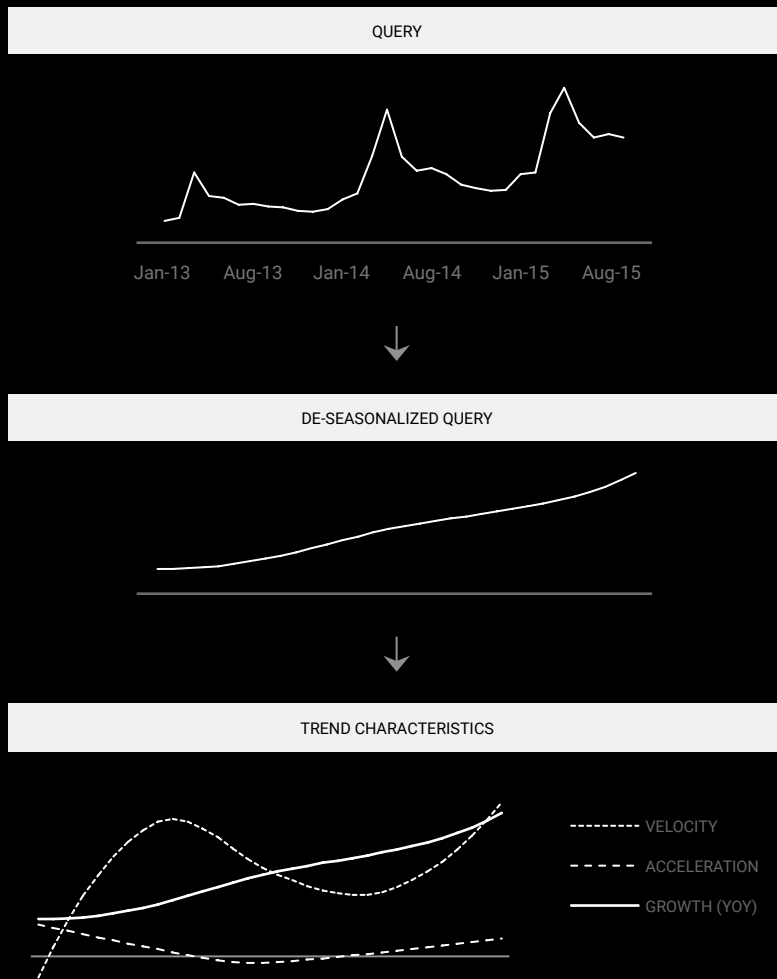
Photo Credit: Blind Barber (Men's Hair), Meladee Shea Gammelseter (Women's Hair), Andrea Grabher/Christian Anwander (Colored Hair), Catface Hair (Box & Twist Braids), Maria Valentino/MCV photo (Goddess Braid)

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Methodology

To compile a list of accurate trends within the beauty industry, we pulled top volume queries related to the beauty category and looked at their monthly volume from January 2013 to August 2015. We first removed any seasonal effect, and then measured the year-over-year growth, velocity, and acceleration for each search query. Based on these metrics, we were able to classify the queries into similar trend patterns. We then curated the most significant trends to illustrate interesting shifts in behavior.



Part One

Top risers and decliners

Part Two

A spotlight on top trending themes

Part Three

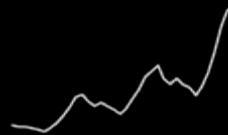
An extensive list of top hair care trends

Trend Categories

To identify top trends, we categorized past data into six different clusters based on similar behaviors. This section distinguishes between the trends to watch and the trends to forget.



Sustained
Risers



Seasonal
Risers



Rising
Stars



Sustained
Decliners



Seasonal
Decliners



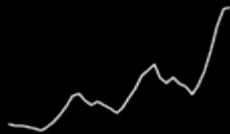
Falling
Stars

Risers



Sustained
Risers

Steady growth over the past years, these trends are safe bets.



Seasonal
Risers

Seasonal trends that are likely to come back even stronger.



Rising
Stars

Sudden growth within the past months, these trends might not last.

Risers



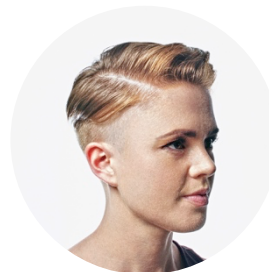
Sustained Risers

messy hair
balayage hair
top knot bun
dutch braid
mid fade haircut



Seasonal Risers

crown braid
side shaved hair
natural curly hair
burgundy hair
high top fade



Rising Stars

hair sponge
man bun undercut
undercut women
rose gold hair
mohawk braid

Decliners



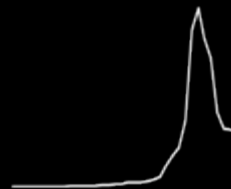
Sustained
Decliners

Steady decline over the past years, these trends are fading out.



Seasonal
Decliners

Seasonal trends that are likely to decrease in demand every year.



Falling
Stars

Fads that have reached their peak and have already started to decline rapidly.

Decliners



Sustained Decliners

sock bun
scene haircuts
side swept bangs



Seasonal Decliners

fishtail braids
french twist
half updos



Falling Stars

plopping hair
rainbow hair
pixelated hair

Part One
Top risers and decliners

Part Two

A spotlight on top trending themes

Part Three
An extensive list of top hair care trends

Deep Dive



Men's Hair



Braids



Color

Deep Dive



Men's Hair



Braids



Color

Men's Hair

Sustained Risers

afro fade ⁽¹⁾
afro taper
comb over ⁽²⁾
disconnected hair
fade haircuts ⁽³⁾
high and tight
mid fade haircut
slicked back undercut
undercut

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Men's Hair

Seasonal Risers

flat top haircut (1)
high top fade
pompadour fade (2)
taper haircut (3)

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Photo Credit: Blind Barber

Men's Hair

Rising Stars

box haircut
caesar haircut ⁽¹⁾
hair sponge
lower taper fade
man bun ⁽²⁾
man bun undercut
mohawk fade
samurai hairstyle ⁽³⁾

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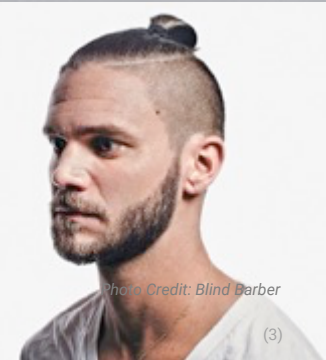


Photo Credit: Blind Barber



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MAN BUN **VS.** COMB OVER

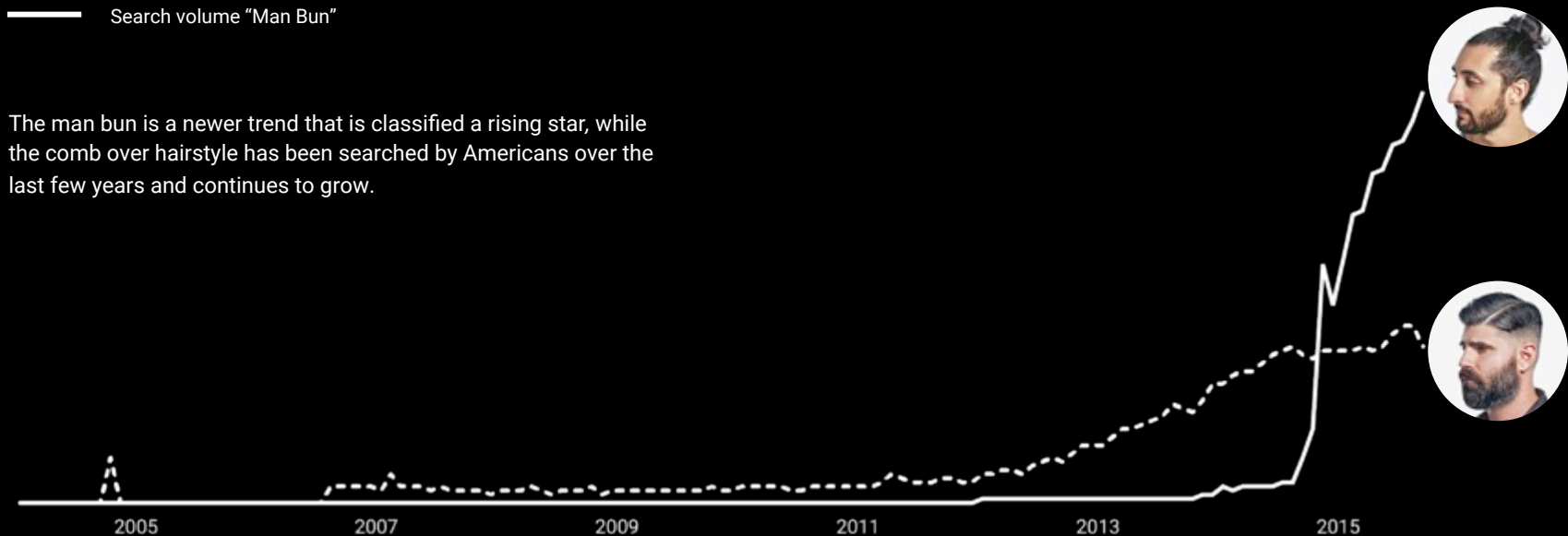


Photo Credit: Blind Barber

Top Trending Styles

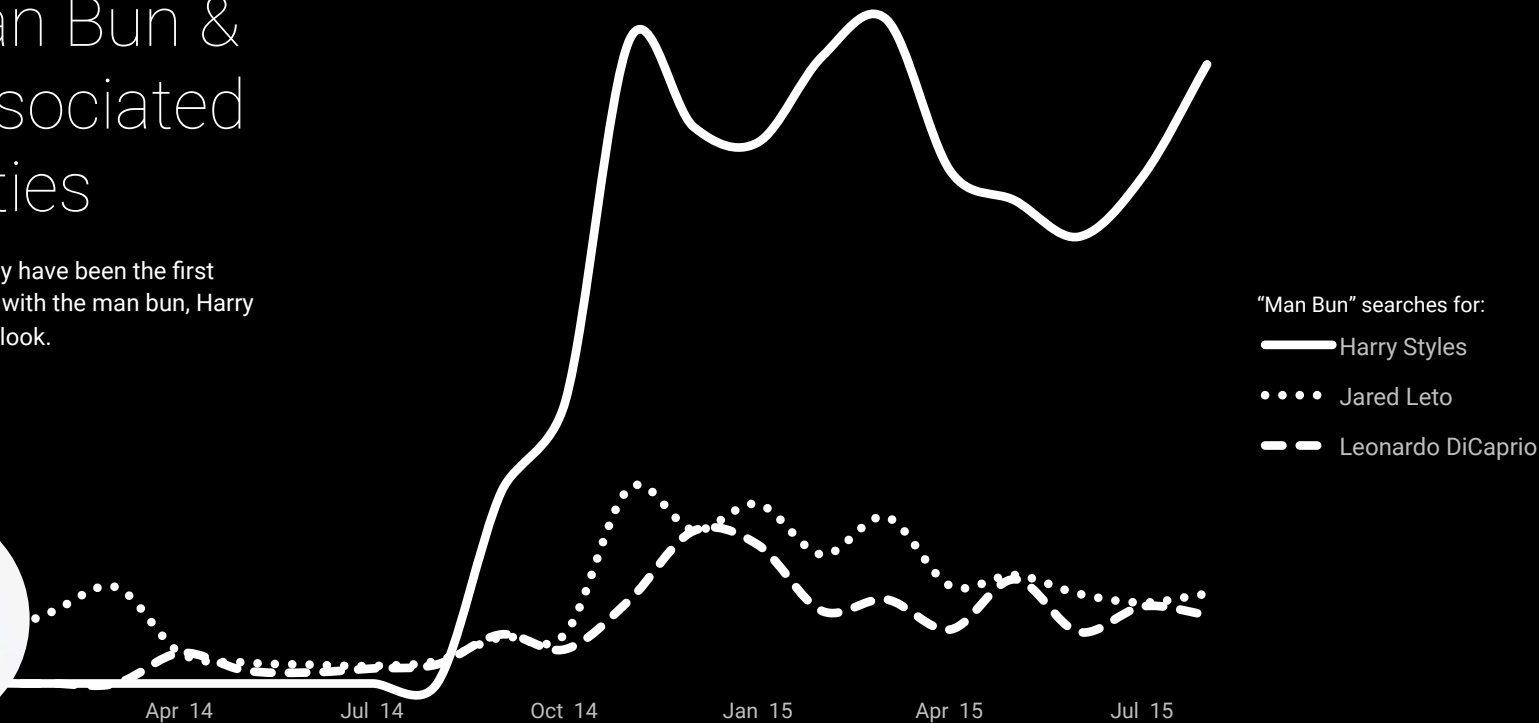
2005-2015

Search volume "Comb Over"
Search volume "Man Bun"



The Man Bun & Top Associated Celebrities

While Jared Leto may have been the first celebrity associated with the man bun, Harry Styles is owning the look.



The Comb Over & Top Associated Celebrities

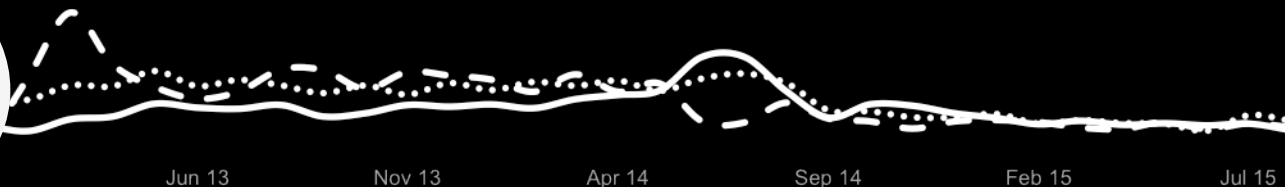
Many different celebrities have been associated with the Comb Over hairstyle throughout time, with nobody really inspiring the look.

"Comb Over" searches for:

— Cristiano Ronaldo

..... David Beckham

- - Justin Timberlake



Top Associated Keywords



Man Bun

how to do
how to grow
how to tie
styles

man bun Monday
BuzzFeed
clip on man bun

Comb Over

fade
taper
low fade
high fade
short
long
beard
skin fade
mohawk
mid fade



Still in its infancy, man bun searches are focused on how-to's and social activity. Being more mature, the comb over look is most associated with its variety of styles.

Man Bun On YouTube

4.1M

views for top five how-to videos

PRODUCTS FEATURED:

- light cream (medium hold)
- sponge wax
- sea spray
- styling powder
- matte finish stronghold product (beeswax paste)
- pre-styling spray (with heat protection)

A variety of products are being positioned alongside the man bun trend.



Comb Over On YouTube

10.3M

views for top five how-to videos

PRODUCTS FEATURED:

- pomade
- after shave
- styling gel (firm hold)

Top how-to videos for the comb over look have been available for longer than man bun how-to videos, accruing more views over time.



Geography

Size of circle: relative to overall beauty searches



Man Bun



Comb Over

Comb over search terms over-index on the West Coast, whereas man bun is a national trend.
Key focus cities for comb over include: Los Angeles (CA), San Francisco (CA).

Summary

Men's hairstyles are topping the trending list as new (and old) styles become more popular. Classic looks, such as the comb over, are coming back in many variations. Men are searching to learn more about all these different looks and understand their nuances.

Understanding the difference between the looks is only half the battle—men want to know how to get these looks. They're turning to online video to learn how to get the style and which products to use. Men are being encouraged to use a variety of products when trying to achieve top rising looks, such as the man bun.

Celebrities are having a big impact in influencing these trends. It seems that men's hairstyles are more likely to spread nationally when highly associated with celebrities.



Deep Dive



Men's Hair



Braids



Color

Braids

Sustained Risers

dutch braid ⁽¹⁾

halo braid ⁽²⁾

two braids ⁽³⁾

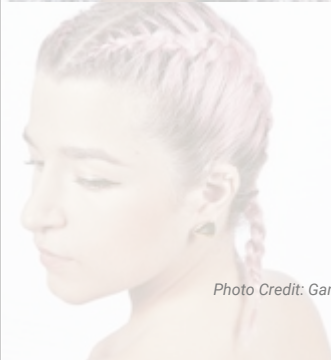
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Braids

Seasonal Risers

big braids
box braids ⁽¹⁾
crown braid
goddess braid ⁽²⁾
jumbo braids
side braids ⁽³⁾

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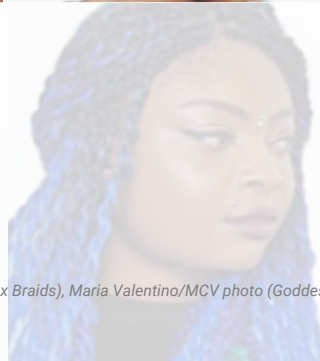


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Braids

Rising Stars

bob box braids
bob braids
french braids (1)
ghana braids
medium box braids
twist braids (2)
mohawk braid (3)

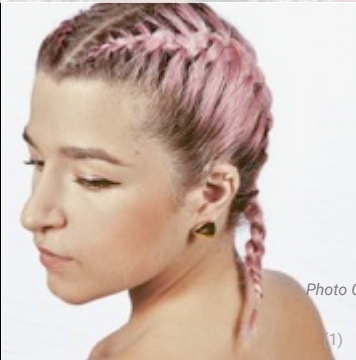
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BOX
BRAIDS
VS.
GODDESS
BRAIDS

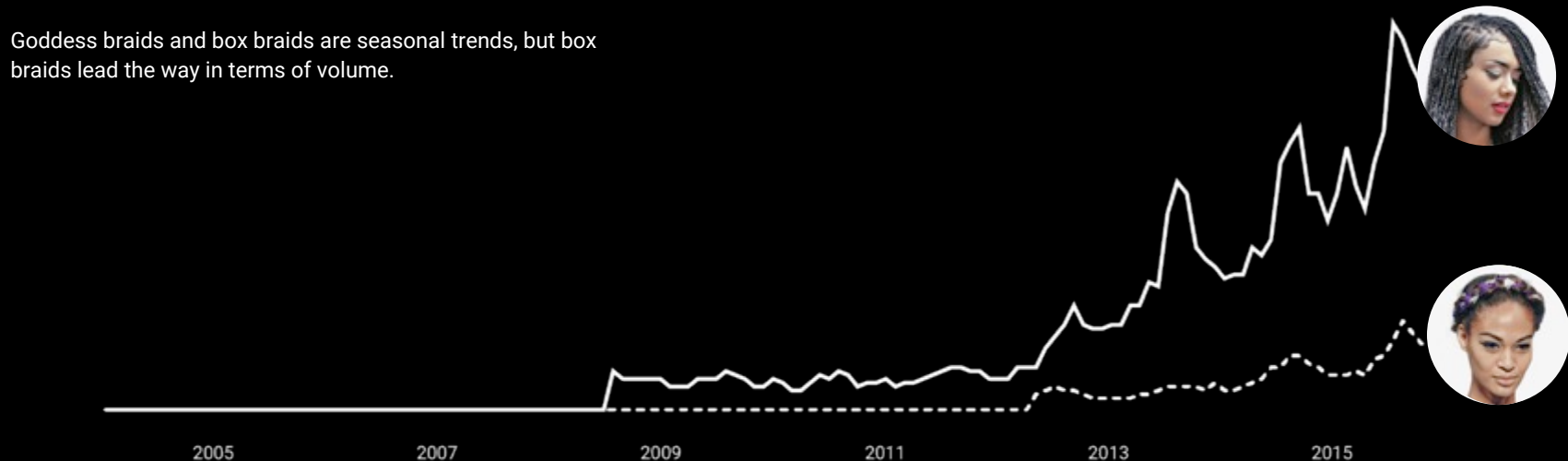


Photo Credit: Catface Hair (Box Braids), Maria Valentino/MCV photo (Goddess Braid)

Top Trending Styles

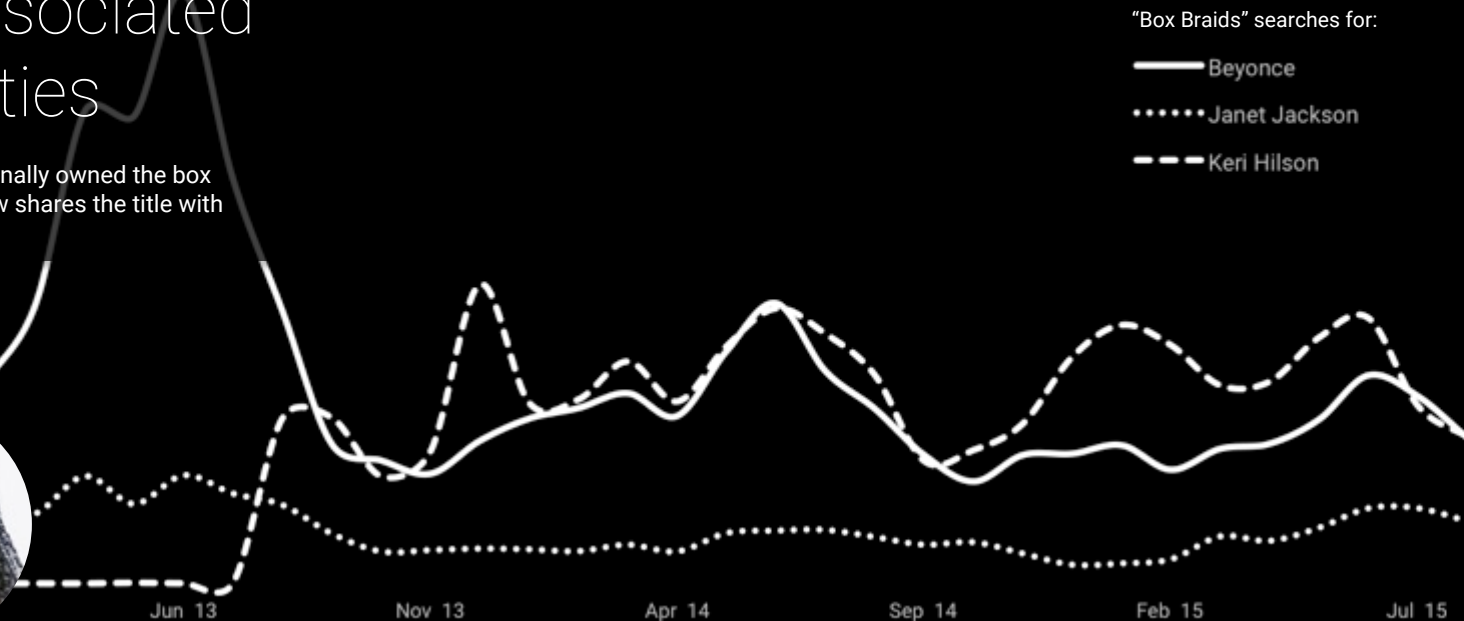
2005-2015

Search volume "Goddess Braids"
Search volume "Box Braids"



Box Braids & Top Associated Celebrities

While Beyoncé originally owned the box braids look, she now shares the title with Keri Hilson.



Goddess Braids & Top Associated Celebrities

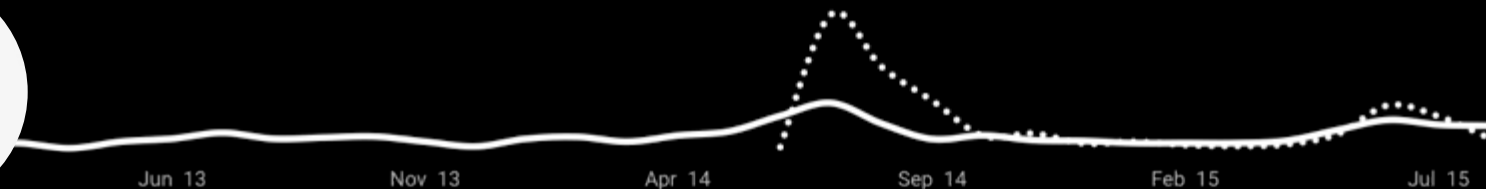
Compared to box braids, the goddess braids trend is much less associated with celebrities.



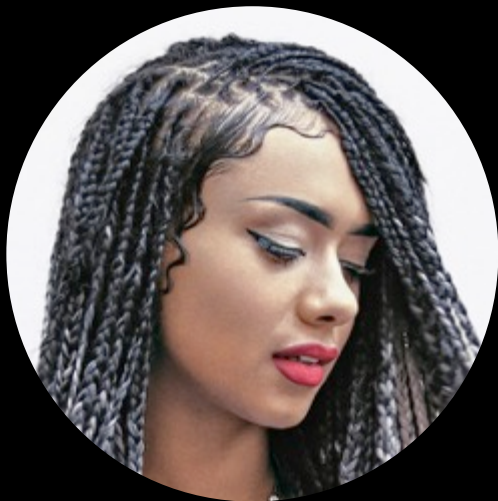
"Goddess Braids" searches for:

— Ciara

..... Rasheeda



Top Associated Keywords



Box Braids

blonde
color
red
purple
burgundy

how to wash
how to take care
how long
how to sleep
maintaining

Goddess Braids

two
three
2
four

what kind of hair
how many packs
marley hair
what type of hair



Given its long-term nature, the box braids trend is most searched along with dyes and maintenance support. Both trends are associated with extensions, but goddess braids show variety in quantity of braids.

Box Braids On YouTube

7.7M

views for top five how-to videos

PRODUCTS FEATURED:

- braid spray
- styling gel
- castor/argan oil

According to the top five how-to videos, box braids demonstrate a need for fewer products than the man bun. There is still a need for products to maintain the braids, scalp, and edges.



Goddess Braids On YouTube

5.0M

views for top five how-to videos

PRODUCTS FEATURED:

- conditioning & styling gel
- braid/oil sheen spray
- mousse
- hair butter

A more flexible style than box braids, consumers may need extra product for this look.

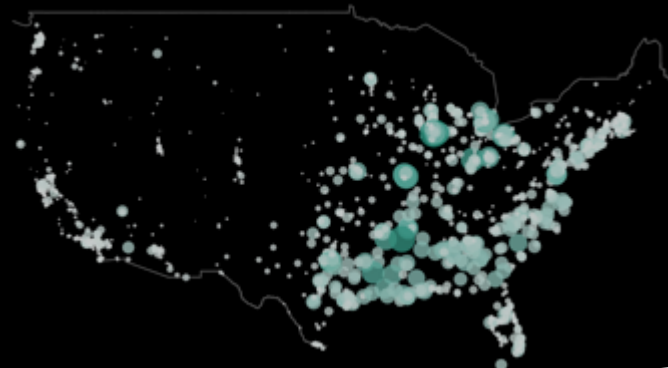


Geography

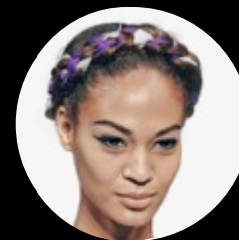
Size of circle: relative to overall beauty searches



Box Braids



Goddess Braids



Box braids and goddess braids are trending in the same areas.
Key focus cities for box & goddess braids include: Atlanta (GA), Memphis (TN), Jackson (MS).

Summary

For women's hairstyles, braids are taking over the trending list. With so many shapes, styles, and sizes, it would be hard to get bored with this trend.

As braids range from short term to long term, different products may be required for styling and maintenance. The top trending braid styles do not require many different products, but there is still a need for product usage to achieve and maintain the looks.

While the braids trend is a national trend overall, top volume trending styles, such as box braids and goddess braids, are trending in Southern states.



Deep Dive



Men's Hair



Braids



Color

Colors

Sustained Risers

ash blonde hair
balayage hair
dark purple hair
light blue hair ⁽¹⁾
orange hair ⁽²⁾
platinum hair
purple and blue hair
purple hair ⁽³⁾
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Colors

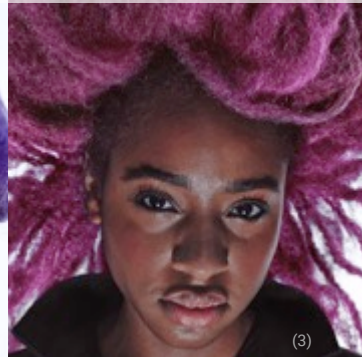
Seasonal Risers

blue hair
blue ombre hair
chocolate brown hair ⁽¹⁾
lavender hair
pastel colors
pastel purple hair ⁽²⁾
pink hair ⁽³⁾
plum hair color
teal hair

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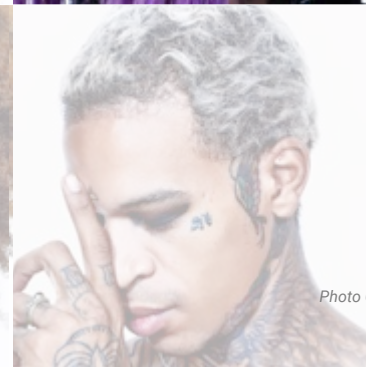
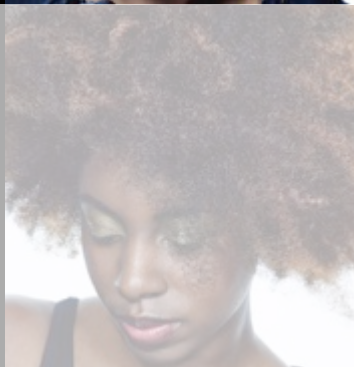


Photo Credit: Andrea Grabher / Christian Anwander

Colors

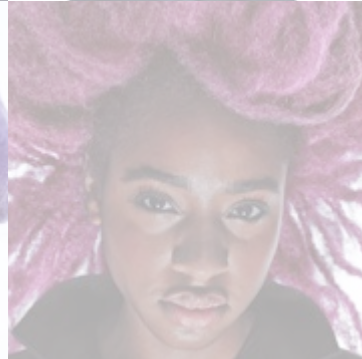
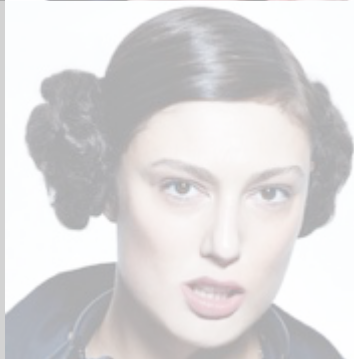
Rising Stars

brown ombre (1)
grey hair color (2)
magenta hair
rose gold hair
silver hair (3)

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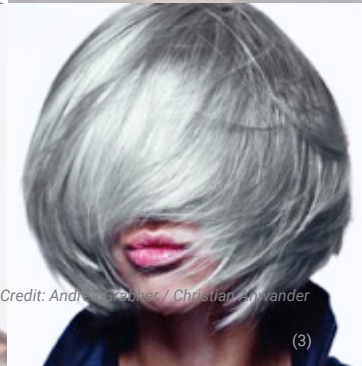
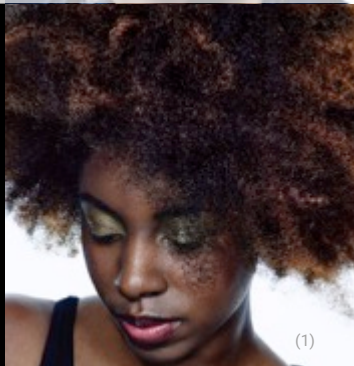


Photo Credit: Andrei Grebner / Christian Eywander



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SILVER HAIR **VS.** PURPLE HAIR



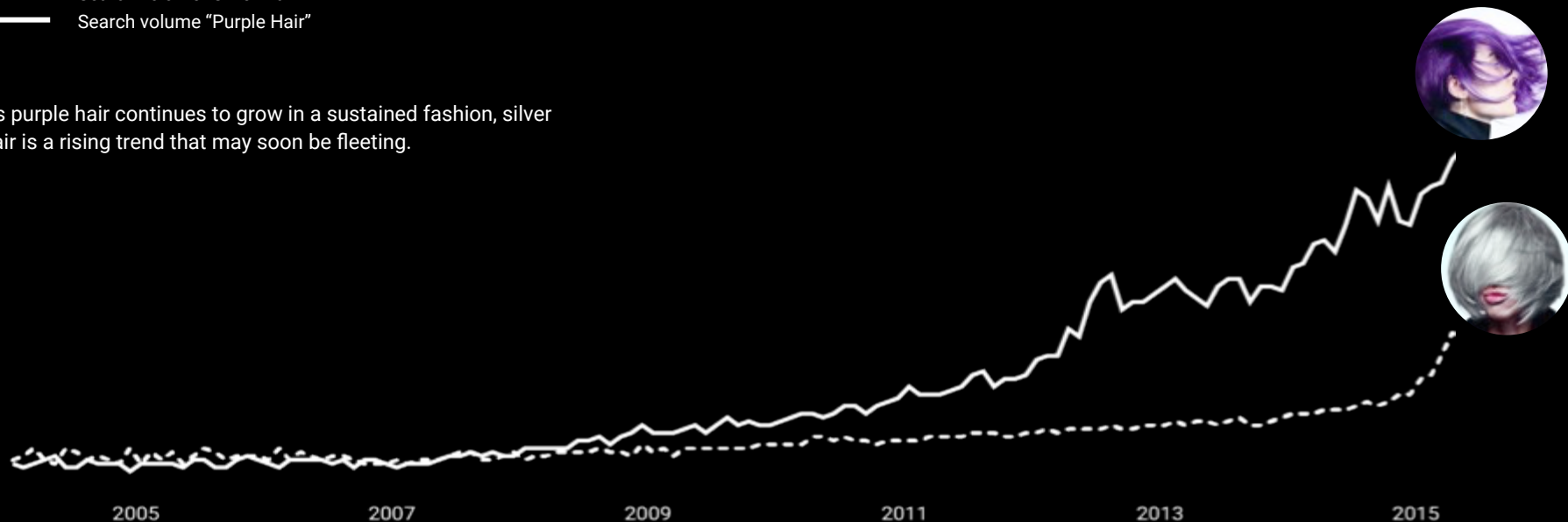
Photo Credit: Andrea Grabher / Christian Anwander

Top Trending Styles

2005-2015

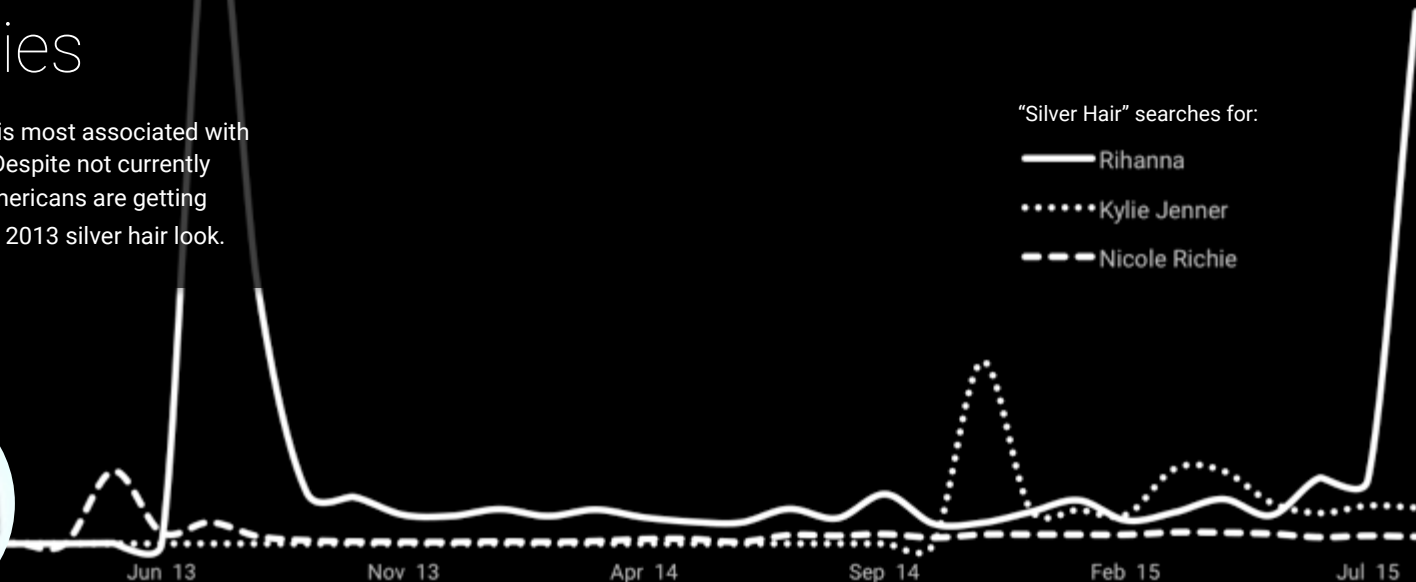
Search volume "Silver Hair"
Search volume "Purple Hair"

As purple hair continues to grow in a sustained fashion, silver hair is a rising trend that may soon be fleeting.



Silver Hair & Top Associated Celebrities

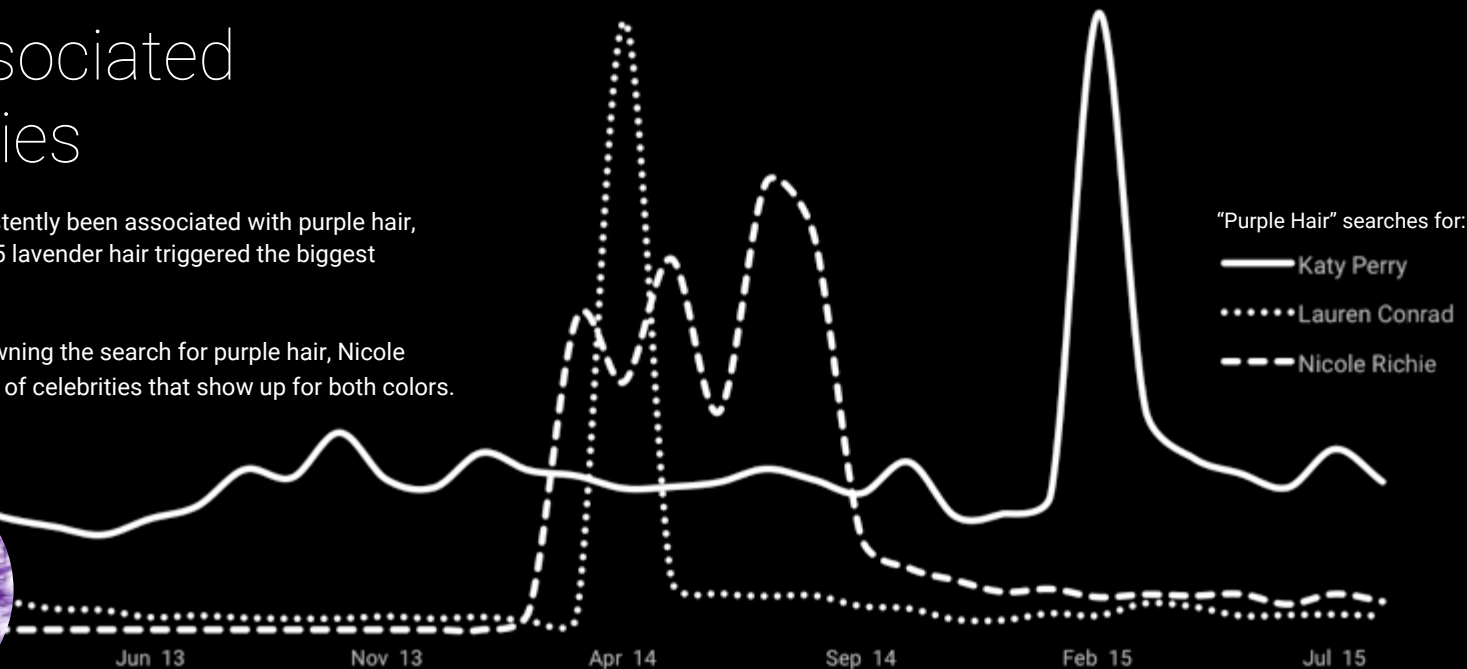
Once again, Rihanna is most associated with the silver hair trend. Despite not currently rocking silver hair, Americans are getting inspired by Rihanna's 2013 silver hair look.



Purple Hair & Top Associated Celebrities

Katy Perry has consistently been associated with purple hair, but her February 2015 lavender hair triggered the biggest response.

Although she's not owning the search for purple hair, Nicole Richie is among a list of celebrities that show up for both colors.



Top Associated Keywords



Silver Hair

silver ombre
silver blonde
silver purple
silver blue
black & silver

men
dark skin
guys

Purple Hair

dark purple hair
purple ombre
pastel purple
light purple
blue & purple

dark hair
curly hair
dark skin



Both trends are similar in top associated searches. They are often combined with other colors, including each other and they are being adopted by a diverse audience. Men, however, are more likely to show interest in silver hair than purple hair.

Silver Hair On YouTube

6.9M

views for top five how-to videos

PRODUCTS FEATURED:

- bleach
- hair dye
- developer
- purple shampoo & conditioner
- hair mask
- liquid toner
- temporary hair color rinse
- peroxide
- hair polish



Purple Hair On YouTube

10.1M

views for top five how-to videos

PRODUCTS FEATURED:

- dye
- bleach
- developer
- conditioner (silicone free)

Purple hair how-to videos feature fewer products than silver hair how-to videos, shedding light on the level of difficulty to achieve and maintain the silver look. This may also explain the greater interest in DIY purple hair videos by view count.



Geography

Size of circle: relative to overall beauty searches



Silver Hair



Purple Hair



Silver hair emerged as a national trend, whereas purple hair was more prominent on the West Coast.
Key focus cities for Purple Hair include: Coachella (CA), San Jacinto (CA).

Summary

Americans are becoming more playful when it comes to colors. From metallics to pastels, trending searches come in all different tones.

Celebrities, such as Nicole Richie, are inspiring creativity by dabbling in different colors. Those that are associated with specific colors, such as Katy Perry and purple hair, are influencing consumers to experiment with the different shades and tones of one color.

Although hair colors are mainly national trends, events such as music festivals may stimulate interest in certain regions.



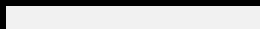
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An extensive list of top hair care trends

Jargon



Query

Aggregated and anonymous user searches on Google Search platforms. These searches are exact match, and do not take other spelling variations into account.



Index

The volume of searches for a query relative to the total number of searches for any query in the same category.



Growth

The year-over-year growth per query, comparing Google search volume in June-August 2015 to the same period in 2014.

Hair Category CUTS

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Photo Credit: Andrea Grabher / Christian Anwander

Query	Index	Growth
short haircuts	100	105%
pixie cut	34	48%
fade haircut	22	87%
haircuts for men	21	73%
bob haircuts	20	22%
medium haircuts	18	11%
ruby rose long hair	15	∞
long bob	13	40%
bangs	13	-7%
layered haircuts	12	1%
bob hairstyles	12	38%
taper fade	11	57%
shoulder length haircuts	11	45%
shoulder length haircuts	11	45%
comb over	10	51%
medium length haircuts	9	-22%
side bangs	7	-14%
buzz cut	6	27%
high and tight	6	32%

Query	Index	Growth
lob haircut	6	171%
short curly hair	6	101%
face shapes	5	21%
long layered haircuts	5	-50%
south of france haircut	5	38%
short bob haircuts	4	65%
short haircuts for women over 50	4	69%
inverted bob	4	5%
haircuts for round faces	4	-24%
hipster haircut	4	59%
layered bob	4	9%
bowl cut	4	30%
asymmetrical bob	4	-3%
high top fade	4	38%
side swept bangs	4	-25%
mohawk haircut	3	16%
shag haircuts	3	255%
stacked bob	3	40%
a line bob	3	4%
pompadour fade	3	162%

Hair Category STYLES

think with Google



Photo Credit: Andrea Grabher / Christian Anwander

Query	Index	Growth
hairstyles	100	-3%
box braids	48	58%
crochet braids	37	200%
braids	32	45%
goddess braids	29	97%
natural hairstyles	25	131%
fishtail braid	18	-17%
senegalese twist	17	-1%
dreadlocks	17	13%
cute hairstyles	16	4%
cornrows	16	63%
bantu knots	15	12%
curly hair	15	36%
french braid	14	23%
wedding hairstyles	13	-14%
waterfall braid	13	-22%
wavy	11	45%
poetic justice braids	11	8%

Query	Index	Growth
curl	8	22%
fohawk	7	3%
updos for long hair	6	6%
updos	6	46%
dutch braid	6	65%
kinky twists	6	1%
tree braids	6	-8%
micro braids	5	14%
messy bun	5	20%
scene hair	5	-26%
prom hairstyles	5	9%
sock bun	4	-24%
ponytail	4	47%
updos for short hair	4	-7%
big box braids	4	91%
cowlick	4	7%
plopping	3	-43%
chignon	3	-4%

Hair Category DYES

think with Google



Photo: Pratik V. Nigam / Getty Images / Christian Anwander

Query	Index	Growth
ombre hair	100	-11%
balayage	94	155%
blonde hair	33	46%
red hair	30	11%
hair color	27	13%
highlights	26	5%
light brown hair	24	20%
purple hair	24	53%
blonde highlights	22	0%
hair color ideas	20	13%
burgundy hair	18	207%
blue hair	17	55%
auburn hair	15	11%
silver hair	14	234%
strawberry blonde	13	64%
hair dye	12	28%
dirty blonde hair	12	19%
black hair	12	19%
dark brown hair	12	27%
rainbow hair	11	148%

Query	Index	Growth
pastel colors	11	39%
grey hair	11	205%
brown hair	11	19%
pink hair	10	34%
dark red hair	10	29%
henna hair dye	9	-6%
balayage ombre	8	65%
platinum blonde hair	8	47%
mermaid hair	7	125%
ash blonde hair	7	136%
dark blonde hair	7	33%
dark purple hair	7	60%
lavender hair	7	45%
white hair	6	43%
shades of purple	6	31%
beige color	6	48%
fuchsia color	5	254%
semi permanent hair color	5	-4%
purple ombre hair	5	23%
caramel hair color	5	13%

Hair Category PRODUCT

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Photo Credit: Andrea Grabner / Christian Anwander

Query	Index	Growth
curling wand	100	30%
dry shampoo	97	23%
sulfate free shampoo	89	25%
pomade	79	26%
purple shampoo	65	85%
hair straightener	65	52%
curling iron	63	53%
hair clippers	58	28%
shampoo	58	23%
flat iron	56	43%
hair dryer	56	43%
ionic	54	117%
clarifying shampoo	49	26%
curl sponge	48	∞
hair sponge	47	∞
flexi rods	44	38%
natural hair products	42	6%
hair growth products	33	145%
perm rods	29	97%
shampoo for oily hair	27	17%

Query	Index	Growth
blow dryer	26	56%
lice shampoo	25	59%
hair growth shampoo	22	53%
organic shampoo	22	7%
curly hair products	21	6%
shampoo for hair loss	21	50%
homemade shampoo	19	-18%
keratin shampoo	17	32%
tea tree oil shampoo	17	63%
argan oil shampoo	16	94%
best sulfate free shampoo	14	51%
baking soda shampoo	13	-30%

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