

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Beauty device sales remain flat due to a struggling hair appliance segment reflecting long purchase cycles, pricedriven consumers, and women delaying purchases until their existing item is broken or worn out."

> - Margie Nanninga, Beauty & Personal Care Analyst

This report looks at the following areas:

- Beauty device sales remain flat
- Ownership of skincare devices is limited, lapsed usage presents concerns
- Brands face challenges in setting hair appliances apart

Skincare device sales have helped to buoy the overall market, benefiting from the relative newness of the category. Increasing awareness of newer beauty device formats, such as styling wands and niche skincare devices, including laser devices and LED light therapy devices, can further boost sales.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com

**DID YOU KNOW?** 

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## **Table of Contents**

#### Overview

What you need to know

## Definition

## Executive Summary

### The issues

#### Beauty device sales remain flat

Figure 1: Total US retail sales of select haircare and skincare beauty devices, at current prices, 2011-16(est.)

Ownership of skincare devices is limited, lapsed usage presents concerns Figure 2: Skincare device usage, August 2016

#### Brands face challenges in setting hair appliances apart

Figure 3: Hair appliance features - Any rank (net)\*, August 2016

#### The opportunities

#### Increase awareness of newer formats

Figure 4: Attitudes regarding awareness of beauty devices, August 2016

#### Position products as being gentle, highlight reduced damage

Figure 5: Attitudes toward beauty device safety, August 2016

#### Niche products encourage increased spend among target audiences

Figure 6: Mean amount (\$) that consumers are willing to pay for product innovations, August 2016

#### What it means

## The Market – What You Need To Know

Strong skincare device sales help offset struggling hair appliances

More spend allocated toward topical products, opportunities for cross-promotion

Market challenges include professional services, simplified beauty routines

Confident consumers boost market, aging population presents challenges

### **Market Size Trends**

#### Strong skincare device sales help offset struggling hair appliances

Figure 7: Total US retail sales of select haircare and skincare beauty devices, at current prices, 2011-16(est.)

Figure 8: Total US retail sales and forecast of selected haircare and skincare beauty devices, by type\*, at current prices, 2014 and 2016

#### Hair appliances struggle in MULO

Figure 9: MULO sales of hair appliances, 2014 and 2015

## **Market Breakdown**

#### More spend allocated toward topical products than beauty devices

Figure 10: Sales of haircare, facial skincare, hair appliances, and skincare devices, at current prices, 2014 and 2016(est.)

#### Opportunities to cross-promote topical products and beauty devices

Figure 11: Haircare products intended for use with hair appliances, 2016

In their words

# BUY THIS REPORT NOW



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### **Market Perspective**

Uncertainty over skin type presents challenges for skincare device sales Figure 12: Facial skin type, February 2015

Younger women's routines show opportunities for skincare devices Figure 13: Skincare routines, August 2016

Figure 14: Skincare routines, by all and aged 18-24, August 2016

### Haircare routines provide insights into hair appliance usage

Figure 15: Occasional haircare routine, January 2016

#### Professional services challenge beauty device sales

Challenges in motivating consumers to make purchases for reasons beyond replacement

In their words

#### **Market Factors**

#### Snapshot of beauty device users

Figure 16: Skincare device, blow dryer, flat iron, styling wand, curling iron, and hot roller user profiles, August 2016

#### Growing Hispanic population bodes well for beauty device sales

Figure 17: Population by race and Hispanic origin, percent change 2016-21

#### Aging population presents challenges

Figure 18: Population of women, by age, 2011-21

#### High price points keep skincare devices out of reach for the average woman...

Figure 19: Skincare devices - Optimal price, December 2014

#### In their words

...but more confident consumers may spend more on beauty devices Figure 20: Consumer Sentiment Index, January 2011-June 2016

### Key Initiatives – What You Need to Know

Increasing hair appliance repertoire, brand extensions for skincare devices

Hair appliances challenged to stand out, limited awareness of skincare devices

Blow dryers get a makeover, skincare devices address added concerns

#### What's In?

Hair appliances

Interest in new formats may combat struggling hair appliance sales

Mini and cordless hair appliances appeal to on-the-go lifestyles

Healthy-hair trends boost Remington products that reduce heat damage

Skincare devices

Skincare brands broaden their reach with male-specific devices

Brand extensions prevalent in new skincare device launches

#### What's Out?

Hair appliances

Basic hair appliance claims are highly saturated, leading to mixed results

# BUY THIS REPORT NOW



# Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Social media challenges make it hard for hair appliance brands to stand out Figure 21: Display of hair appliances at Target, August 2016

#### Skincare devices

High price points, lack of awareness continue to limit skincare device ownership

#### What's Next?

Hair appliances

Blow dryers get a makeover

Products offering new ways to curl give women more variety

Customizable products offer broader benefits

Skincare devices

Skincare devices address a wider variety of concerns

### The Consumer – What You Need to Know

Despite limited trial, interest in skincare devices is strong

Younger women drive use of new hair appliance formats

Cleansing devices in high demand, interest in specific benefits

Price drives hair appliance purchases, reviews are influential

Skepticism over skincare device efficacy slows market growth

Heat damage a top concern, limited awareness of styling wands

Products garnering niche interest profit from willingness to pay more

### Skincare Device Usage

Skincare device trial is limited, though interest is strong

Lapsed usage a concern given newness of category

Figure 22: Skincare device usage, August 2016

#### Younger, affluent women drive skincare device usage and interest

Figure 23: Skincare device usage - any usage or interest (net), by age and household income, August 2016

#### In their words

#### Hispanics report higher usage, Black women show strong interest

Figure 24: Skincare device usage – any skincare device (net)\*, by race/Hispanic origin, August 2016

### Hair Appliance Usage

#### Hair appliance usage is widespread

Figure 25: Hair appliance usage – Any use (net\*), August 2016

#### Hot rollers and curling irons impacted by lapsed users

Figure 26: Hair appliance usage, August 2016

#### Younger adults drive usage of newer formats

Figure 27: Hair appliance usage, any use (net)\*, by age, August 2016

### Hispanics higher users of hair appliances, race impacts appliances used

Figure 28: Hair appliance usage – Any use or interest (net), by race/Hispanic origin, August 2016

#### **Skincare Device Benefits**

# BUY THIS REPORT NOW



# Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Devices that improve skin tone of high interest to women Figure 29: Skincare device benefits - Any rank (net), August 2016 Cleansing benefits in demand Figure 30: Skincare device benefits, by rank, August 2016 Lifestage impacts benefits sought Figure 31: Select skincare device benefits - any rank (net), by age, August 2016 Hispanic women interested in variety of skincare device benefits Figure 32: Select skincare device benefits - any rank (net), by race/Hispanic origin, August 2016 Opportunities to pair topical products with skincare devices Figure 33: Skincare device benefits - Any rank, by skincare routines, August 2016 **Hair Appliance Features** Price drives hair appliance purchases, added benefits differentiate products Figure 34: Hair appliance features, August 2016 Indifference, replacement-driven shopping further challenges brands In their words Products promising faster results may reach women In their words Features considered by older women, younger women emphasize reviews Figure 35: Hair appliance features - Any rank (net), by age, August 2016 Hispanics may be willing to spend more for added features Figure 36: Select hair appliance features - any rank (net), by all, Black, and Hispanic, August 2016 **Attitudes toward Skincare Devices** Skepticism over skincare device efficacy slows market growth Figure 37: Attitudes toward skincare devices, August 2016 Skincare devices viewed as expensive, even by women with higher incomes Figure 38: Attitudes toward skincare devices, by household income, August 2016 Black women present opportunities for increasing market penetration Figure 39: Attitudes toward skincare devices, by race/Hispanic origin, August 2016 **Attitudes toward Hair Appliances** Damage a top concern, limited awareness of styling wands Figure 40: Attitudes toward hair appliances, August 2016 Younger women more aware of styling wands Figure 41: Attitudes toward hair appliances, August 2016 Hispanics less likely to worry about damage Figure 42: Attitudes toward hair appliances, by race/Hispanic origin, August 2016 Product Innovations Consumers express interest in product innovations - but aren't willing to pay Figure 43: Willingness to pay for product innovations, August 2016

# BUY THIS REPORT NOW



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Products garnering niche interest profit from willingness to pay more

Figure 44: Mean and median amounts that consumers are willing to pay for product innovations, August 2016

Women don't know much about existing innovations

In their words

Younger women, Hispanics drive interest in product innovations

Figure 45: Willingness to pay for product innovations - any amount, by age and race/Hispanic origin, August 2016

Figure 46: Willingness to pay for product innovations – more than \$150, by race/Hispanic origin, August 2016

	Data sources
	Sales data
	Consumer survey data
	Consumer qualitative research
	Abbreviations and terms
	Abbreviations
٩p	pendix – Consumer
	Figure 47: Professional services performed, January 2011-March 2016

# BUY THIS REPORT NOW