

Report Price: £1995.00 | \$3230.80 | €2534.27

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



"The beauty devices and hair appliances sector is expected to rise in value in 2016 driven by NPD; however expense remains a barrier, particularly for beauty devices. Those interested in buying beauty devices also cited a lack of research as a reason for not buying. In the hair appliance sector, changes in styling trends as well as damage concern are impacting usage frequency."

- Roshida Khanom, Senior Personal Care Analyst

# This report looks at the following areas:

- Opportunities for education in the beauty device sector
- Saving time and money are key motivators
- Damage concern and changing styles are driving hair appliance usage

This report concentrates on consumer usage and purchasing of beauty devices, defined as electronic equipment designed for the purpose of beauty enhancement, which can be purchased and used at home. As beauty devices and appliances are primarily aimed at women, this report will be focused on women's usage and attitudes towards beauty devices and appliances.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

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

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +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: £1995.00 | \$3230.80 | €2534.27

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

Products covered in this report

#### **Executive Summary**

Small growth in value estimated for 2016

Effortless hair trends impacting appliances

Innovating beyond skincare and hair removal

Interest in beauty devices is high

Figure 1: Usage of beauty devices and hair appliances, August 2016

Time and money are motivators for usage

Figure 2: Reasons that have/would encourage usage of beauty devices, August 2016

Washing hair is the highest usage occasion for hair appliances

Figure 3: Usage occasions of hair appliances, August 2016

Frequency of usage of hair appliances is on the decline

Figure 4: Changes in usage of hair appliances, by youngest demographic, August 2016

Damage concern is driving changes in hair appliance usage

Figure 5: Reasons for changes in usage of hair appliances, August 2016  $\,$ 

Expense is a barrier to purchase for beauty devices and hair appliances

Figure 6: Barriers to purchasing beauty devices and hair appliances, August 2016

What we think

#### **Issues and Insights**

Opportunities for education in the beauty device sector

The facts

The implications

Saving time and money are key motivators

The facts

The implications

Damage concern and changing styles are driving hair appliance usage

The facts

The implications

# The Market - What You Need to Know

Overall growth in the category

Older women present growth opportunities

Salon treatments are more affordable

Inside-out beauty may be impacting the sector

Effortless hair trends



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

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$3230.80 | €2534.27

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

#### **Market Segmentation**

#### Beauty devices sees small growth

Figure 7: UK retail value sales of the women's hair appliances and beauty devices market, 2015-16 (est)

Haircare appliances see a boost in interest

#### **Market Drivers**

#### Opportunities for older women

Figure 8: Trends in the age structure of the UK female population, 2011-21

#### Working from home may free up time

#### Salon treatments are becoming more affordable

Figure 9: Attitudes towards spas and salons, June 2015

#### High consumer awareness of skin health

Figure 10: Lifestyle statements, July 2015

#### Demand for effortless hair

Figure 11: Special occasion styling habits, January 2016

Figure 12: 'A courageous beauty' curly hair tutorial, June 2016

#### **Key Players - What You Need to Know**

Innovating beyond skincare and hair removal

Targeting a wider audience

Devices for convenience

Hair removal brands see biggest rise in advertising spend

Hair appliances saw immersive campaigns

#### **Launch Activity and Innovation**

#### Beyond skincare and hair removal

# Hair growth opportunities

Figure 13: LaserBrand 82 by HairMax, March 2016

## Make-up application devices

Figure 14: Temptu, July 2016

Figure 15: Clinique sonic makeup applicator, March 2016

Figure 16: Color Me Pro Edition device, April 2016

# Designing for a wider consumer base

#### Devices for more skin tones

Figure 17: Iluminage TOUCH Permanent Hair Reduction System, July 2016

#### Opportunities in the natural hair movement

Devices for men

Convenience and tracking technology

Multi-functional devices

Diagnostics and tracking technology

Innovations in hair appliances



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

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$3230.80 | €2534.27

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

#### **Advertising and Marketing Activity**

#### Hair removal devices see rise in advertising spend

Figure 18: Recorded above-the line, online display and direct mail advertising expenditure of key brands in the beauty devices sector, 2014-15

#### Controversial campaigns

#### Immersive campaigns for hair appliances

Figure 19: Recorded above-the line, online display and direct mail advertising expenditure of key brands in the hair appliances sector, 2014-15

Figure 20: Remington in-store campaign, October 2016

#### Nielsen Ad Intel coverage

#### The Consumer - What You Need to Know

Interest is not translating to usage

Instant and long-lasting results desired

Saving time and money is important

Washing hair is the highest usage occasion

Damage concern is driving down hair appliance usage

Purchase and interest in hair appliances is high

Expense is a barrier

#### **Usage of Beauty Devices and Hair Appliances**

#### Hair removal devices garner interest

Figure 21: Usage of beauty devices, August 2016

#### Facial focus for older women

Figure 22: Interest in facial beauty devices, by age, August 2016

#### The curl evolution

Figure 23: Usage of hair appliances, August 2016

Styles that could make a comeback

### **Reasons for Using Beauty Devices and Appliances**

# Women want instant and long-lasting results

Figure 24: Reasons that have/would encourage usage of beauty devices, by overall usage of beauty devices August 2016

## Saving time and money is important

#### Boosting traditional products...

Figure 25: Selected reasons that have/would encourage usage of beauty devices, by oldest and youngest demographics, August 2016

#### ...vs replacing traditional products

#### **Usage of Hair Appliances**

## Washing hair is the highest usage occasion

Figure 26: Usage occasions of hair appliances, August 2016

#### Frequency of hair appliance usage is on the decline

Figure 27: Changes in usage of hair appliances, by youngest demographic, August 2016

#### Damage concern is high

Figure 28: Reasons for changes in usage of hair appliances, August 2016

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

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$3230.80 | €2534.27

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

#### Older women more concerned about damage

Figure 29: Selected reasons for changes in usage of hair appliances, by age, August 2016

#### Scalp protecting opportunities

#### Young women have time and money concerns

Figure 30: Lifestyle and money reasons for changes in usage of hair appliances, by age, August 2016

#### **Purchase of Beauty Devices and Hair Appliances**

#### Purchase and interest in beauty devices is high

Figure 31: Purchase of beauty devices, August 2016

# Buyers of hair appliances and beauty devices are likely to be the same

Figure 32: Buyers vs non-buyers of beauty devices and hair appliances, by age, August 2016

#### Expense is the biggest barrier to purchase

Figure 33: Barriers to purchasing beauty devices and hair appliances, August 2016

#### Driving education to encourage purchase

#### Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

**EMAIL:** reports@mintel.com