“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.
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
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
Beauty Devices and Appliances - UK - November 2016

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
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