

Beauty Devices, Tools and Accessories - UK - October 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“Although the value of electrical devices and hair appliances has grown to an estimated £834 million in 2018, new multipurpose appliances threaten long-term growth opportunities in this sector. Non-electrical tools retain popularity via design and self-expression, and consumers continue to use a wide range of non-electrical tools.”

– Alex Fisher, Senior Beauty Analyst

This report looks at the following areas:

- **Multipurpose becomes important**
- **Behaviours do not match intentions**

The growth of the electrical segments within this market would suggest that speed and convenience are what matter most to consumers. However, non-electrical tools remain popular thanks to design innovation that allows users to express themselves through their products. While consumers use a proliferation of brushes and other tools, their electrical beauty regime is small, and some users are looking to rationalise even further with new multipurpose appliances.

Further opportunity lies in closing the gap between behaviour and intent, especially when it comes to the environment and ethics; many consumers understand the importance but are not fully aware of what they can do in this market to make an impact. Very few show ethical or environmental considerations when choosing certain products, meaning well-known brands can do more to publicise the importance of these practices and increase their 'feelgood' factor.

**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

DID YOU KNOW?

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

Beauty Devices, Tools and Accessories - UK - October 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

- The market
- Hair appliances lead growth in electricals
 - Figure 1: UK retail value sales of the hair appliances and beauty devices market, 2016-18 (est)
- Tools benefit from cosmetics' successes
- Companies and brands
- Tools are on-trend
- A device dichotomy
- Brushing up on needs
 - Figure 2: % change in total above-the-line, online display and direct mail advertising expenditure on beauty devices and appliances, by selected advertisers, 2016-17
- The consumer
- All the small things
 - Figure 3: Use and purchase of beauty tools and accessories, July 2018
- Brushes at their best
 - Figure 4: Choice factors when buying make-up applicators, July 2018
- Purposefully positioned
 - Figure 5: Use and purchase of beauty devices and appliances, July 2018
- The power of electricals
 - Figure 6: Behaviours of beauty device and appliance users, July 2018
- Why buy?
 - Figure 7: Attitudes towards beauty devices, tools and accessories, July 2018
- What we think

Issues and Insights

- Multipurpose becomes important
- The facts
- The implications
- Behaviours do not match intentions
- The facts
- The implications

The Market – What You Need to Know

- Hair appliances lead growth in electricals
- Tools benefit from cosmetics' successes

Market Segmentation

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

Beauty Devices, Tools and Accessories - UK - October 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Growth highest among hair appliances

Figure 8: UK retail value sales of the hair appliances and beauty devices market, 2016-18 (est)

Figure 9: Clarisonic Sonic Foundation Brush, June 2018

Market Drivers

Opportunity among older consumers

Figure 10: Trends in the age structure of the UK population, by gender, 2013-23

Cosmetics growth drives tools

Alternatives to procedures

Figure 11: Appearance as a cause of stress over last 12 months, by age and gender, October 2016

Consumer confidence growing

Figure 12: Trends in consumer sentiment around financial situation for the coming year, July 2013-August 2018

Every penny counts

Figure 13: Dyson's supersonic hairdryer, 2017

Act natural

Companies and Brands – What You Need to Know

Tools are on-trend

A device dichotomy

Brushing up on needs

Launch Activity and Innovation

Tools and Accessories

Fantasy worlds

Figure 14: Minutes to Mermaid brush collection by Tarte Cosmetics, March 2018

Be yourself

Figure 15: Personalised Tangle Teezer detangling brush, March 2018

Following the vegan trend

Maintaining your tools

Figure 16: StylPro brush cleaner by Tom Pellereau, May 2017

Devices and Appliances

Affordable treatments

Speed it up

Figure 17: FOREO UFO, August 2018

New technical heights

Figure 18: Kérastase Hair Coach, January 2017

One for all

Figure 19: BaByliss Smooth & Wave TV advert, November 2017

Advertising and Marketing Activity

Dyson spends the most

Figure 20: Total above-the-line, online display and direct mail advertising expenditure on beauty devices and appliances, by selected advertisers, 2016 and 2017

**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

Beauty Devices, Tools and Accessories - UK - October 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 21: Dyson Supersonic hairdryer Christmas advert, December 2017

Multipurpose appeal

Figure 22: Braun Silk-épil 9 Skin Spa advert, February 2018

Brushes make the big time

Figure 23: Real Techniques Brush Crush collection is sent to space, August 2018

Nielsen Ad Intel coverage

The Consumer – What You Need to Know

All the small things

Brushes at their best

Purposefully positioned

The power of electricals

Why buy?

Use and Purchase of Tools and Accessories

Keep it small

Figure 24: Use of beauty tools and accessories, July 2018

High brow

Figure 25: Luxury tweezers from Rubis, March 2017

Men remain an opportunity

Figure 26: Use of beauty tools and accessories, by gender, July 2018

The tools for the job

Figure 27: Use and purchase of beauty tools and accessories, July 2018

Make-up Applicators

Quality above all else

Figure 28: Choice factors when buying make-up applicators, July 2018

The Instagram effect

Figure 29: Selected choice factors when buying make-up applicators, by age, July 2018

Figure 30: Nanshy's 3D Concealer Brush, April 2017

Figure 31: Storybook Cosmetics' Rose Brushes, August 2018

Make-up means clean up

Use and Purchase of Devices and Appliances

Style it out

Figure 32: Use of beauty devices and appliances, July 2018

Figure 33: Use of beauty devices and appliances, by age, July 2018

Big spenders

Figure 34: Use and purchase of beauty devices and appliances, July 2018

Making it up

Device and Appliance Behaviour

The best intentions

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

Beauty Devices, Tools and Accessories - UK - October 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 35: Behaviours of beauty device and appliance users, July 2018

Figure 36: Ultimate Air Dryer Brush by EcoTools, September 2017

Pampering without the price tag

Figure 37: Behaviours of beauty device and appliance users, by devices or appliances used, July 2018

Staying retail-savvy

Attitudes towards Beauty Devices, Tools and Accessories

Environmentally concerned?

Figure 38: Attitudes towards beauty devices, tools and accessories, July 2018

Figure 39: Real Techniques PowderBleu range, June 2017

Trend on trial

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

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