



2nd Edition

Beauty Devices: Global Consumer Insights

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Regional Coverage: Asia ■ Europe ■ United States

Augmenting our robust market research on the global market for beauty devices and professional skin care, this report studies the consumer's decision-making process behind how and what she chooses to meet her skin care needs. Our analysis examines the influencing factors behind a consumer's choice to use one method of skin care, such as an at-home beauty device versus a conventional topical treatment product. We examine shopping preferences, influences, and barriers to device usage and overall grooming habits.

This Report Provides Subscribers with:

- An understanding of factors that influence women's choices to use one skin care approach or method over another
- Perspective on which age-based demographics may be ripe for growth for certain product types
- A view of the importance of shopping venues
- Expansion opportunities



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Findings and Implications at a Glance

- Barriers to device usage
- Motivation factors
- Levels of satisfaction
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Skin Care Concerns

An insightful analysis is provided on how women prefer to address specific skin care concerns, as shown in Table 2.

We compare and contrast findings for each of the six countries listed in Table 1. Select findings are compared to the 2014 edition to show changes in attitude and usage by country.



Attitudes towards Skin Care Usage

Topical Product Usage

Table 1: List of Countries Covered

- China
- France
- Germany
- Japan
- United Kingdom
- United States

Table 2: Skin Care Devices Addressed

- Acne
- Anti-aging
- Cleansing
- Hair removal



Scope

An online attitude and usage survey examines consumers' preference for different forms of skin care treatment options, such as at-home skin care devices that mimic results once only achieved in doctors' offices and spas, in-office professional treatments, and products and general market skin care brands.

- Responses from 1,300 women, approximately 215 per country
- Geographic scope: China, France, Germany, Japan, the United Kingdom, and the United States
- Covers the different types of skin care benefits, including acne elimination, anti-aging, cleansing, hair removal, and protective/preventative/everyday facial skin care

Key Benefits

This report gives brand stewards an invaluable and new understanding of consumer motivations to choose one skin care treatment option over another based on different demographics and country. It also helps subscribers to:

- Develop a more targeted marketing program by understanding the factors why consumers of different ages choose one method of skin care over another
- Identify product expansion strategies based on age-related factors, such as purchasing power and the skin care needs that consumers identify with the most
- Understand the path a woman takes to explore and eventually purchase a skin care option that best suits her needs



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

A structured online survey of 1,300 women is completed with a representative sample of consumers in six countries. The sample consists of women who buy topical products to treat skin care concerns, women who use powered devices to treat skin care concerns, and women who have their skin care needs treated professionally (e.g., at a spa/salon, beauty institute, or in a doctor’s office).



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+1-973-435-3407

Latin America
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+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277