



AESTHETIC SKIN CARE CONSUMER INSIGHTS

Decode consumer behavior with survey data that reveals the aesthetic patient journey and key shifts that have occurred between 2022 and 2023.

This report identifies the unmet needs of aesthetic consumers, the services they are booking, new aesthetic formats/outlets dedicated to accessibility and wellness, and generational behaviors with special attention to Gen Zers and millennials who are increasingly looking for aesthetic solutions.

Scope



- Panel selection
 - 511 aesthetic skin care consumers
 - All key age groups represented in sample (Gen Z, millennials, Gen X, boomers)
- Screening criteria
 - Visited an aesthetic practitioner (dermatologist, plastic surgeon, and/or medi-spa) in 2023
 - Had a minimum of two non-invasive aesthetic procedures in 2023
 - ~80% of panel also purchased professional skin care product during last visit to their aesthetic practitioner
 - Indicate future plans/bookings for non-invasive aesthetic procedure in Q4 2023/1H 2024

Regional Coverage



United States

Features and Timing



Base Year: 2023

Release Date: November 2023

4th edition

**TRACKING KEY PERFORMANCE
INDICATORS**

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Introduction

Key Takeaways

- Shifts in KPIs (Table 1) vs. year ago
- Key trends

Top Priorities

- Skin care goals
- Procedures/services
- Shopping priorities
- Consumer sentiment

Patient Journey

- Shopping habits and spend trends
- Outlet preferences for buying product and booking procedures
- Product replenishment
- Experience with new aesthetic formats/outlet concepts

Product Routines

- AM and PM regimens
- Key product types used
- Brand portfolio
- New brands in daily routine

Purchase Influencers

- Impact of macro trends and economic factors
- Impact of aesthetic practitioners' behaviors
- Impact of influencers/social media

TABLE 1. LIST OF KEY PERFORMANCE INDICATORS

Visit frequency
Average customer value (product)
Service expenditures
Number of products in at-home routine

Consumer Profiles

- Age and generations
- Gender
- Annual household income
- Type of aesthetic consumer (novice, loyalist, advanced)
- Engagement in current beauty trends

SUBSCRIBER BENEFITS

This study shows how the general direction of consumer intentions regarding visits to professional outlets for services, as well as product purchases, may impact the sales of marketers in the near and long terms. It also helps subscribers:



Understand consumers' current and future skin care needs



Prioritize efforts for future initiatives



Identify which services consumers are prioritizing and the unmet needs that they have for skin care

Methodology



This survey relies on a Quantitative Computer-Assisted Web Interviewing survey with 511 U.S. respondents from September-October 2023. These respondents have been thoroughly screened to validate their experience with professional skin care products and non-invasive aesthetic procedures in 2023.

Kline builds on our 60-plus years in the business, leveraging primary research techniques and our team of seasoned professionals to provide a comprehensive understanding of the survey data and uncover its implications for the professional skin care market.

KLINE CREDENTIALS

Kline, an advisory consultancy and market research firm, combines industry expertise and technology to provide highly predictive and actionable data, insights, and advice. Known as "The Industry Experts," we deliver top-notch services in lubricants and petroleum specialties, professional beauty, and specialty chemicals. This focus gives us a competitive advantage and global leadership in these areas. While we also serve adjacent industries, our specialization sets us apart as the leading experts in our chosen fields.



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