

# Aesthetic Skin Care Consumer Insights

**Base Year: 2023**

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

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**4<sup>th</sup> edition**

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.

**Regional Coverage:** • United States

## SCOPE

- › Panel selection
  - 500 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) a minimum of two times in the last 12 months
  - Had a minimum of two non-invasive aesthetic procedures in the last 12 months
  - ~85% of panel purchased professional skin care product during last visit to their aesthetic practitioner; ~15% of panel did not purchase product
  - Indicate future plans/bookings for non-invasive aesthetic procedure in Q4 2023/1H 2024

## TRACKING KEY PERFORMANCE INDICATORS

# AREAS OF EXPLORATION

## Introduction

### Key Takeaways

- Shifts in KPIs (Table 1) vs. year ago
- Brand opportunities
- Recommendations

### Top Priorities

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

### Patient Journey

- Entry points to aesthetics
- New product discovery
- Shopping habits
- 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

### Influencers

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

**TABLE 1. ILLUSTRATIVE 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



## REPORT BENEFITS

This report 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

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 60-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. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

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