



2nd Edition

Professional Skin Care: U.S. Consumer Attitudes and Behaviors Survey

Published July 2019

Regional Coverage: United States

Augmenting 15+ years of extensive reporting of the professional skin care market, Kline is pleased to announce our first edition of an independent research survey which helps marketers understand the consumer attitudes and behaviors toward professional skin care services and products. Survey results pinpoint what consumers value most when it comes to the treatments, brands, and types of products they use through beauty institutes, spas, and salons as well as who and what influences their decisions.

This Report Helps Marketers to:

- Understand which factors consumers consider when choosing to book an appointment at a particular professional outlet
- Learn what motivates a consumer to purchase a product after a service has been performed
- Think about the best way to capture repeat purchases in a professional outlet
- Prioritize efforts for future product development and marketing initiatives based on consumer type (spa-goers, beauty institute-goers, physician-goers)
- Realize the unmet needs of consumers



Report Contents

Results from the survey are delivered in a presentation-style report. Below are details of how the survey is reported.

Methodology

Our survey was conducted with approximately 500 professional skin care consumers in the United States. A description of who is surveyed by consumer type is shown in Table 1. All consumers must have received a skin care service or purchased a skin care product through a professional outlet in the last six months to qualify to be part of our panel.

Key findings at a glance

This report section highlights what the key learnings are from consumers seeking professional skin care services and products through beauty institutes, spas, and physicians by country. Findings are shown by the beauty institute/spa consumer versus the aesthetic-physician dispense consumer.

The business of skin care

This report section provides a profile of the professional skin care consumer. Also included are highlights from our survey areas, such as the importance of certain ingredients, service offerings, repeat purchases (outlets versus e-commerce sites), facial areas of greatest importance (chin/neck, eyes, lips), and price points.

What matters most?

This section reveals exactly how important specific attributes are in the professional skin care consumer's decision to seek skin care services and purchase products through professional outlets. These attributes are listed in Table 3. The results help subscribers see if there is a gap between perceptions of what they believe to be important versus how our panel responds.

Opportunities

This section provides subscribers with valuable recommendations and opportunities to best service their consumers.



Table 1: Skin Care Consumers Types

Spa-goers

Aesthetic practitioner-goers-a

a- Includes dermatologists, plastic surgeons, and medi-spas.

Table 3: List of Attributes

Consumer Engagement:

- Consumer promotions (seasonal treatments/services, discounts, GWP)
- Samples and testers
- Social media engagement
- Loyalty program for consumers

Products and Services:

- Treatments offered
- Treatment length
- Ingredients, including olfactive values
- Product/service education (product claims, clinical support)
- Skin concerns addressed
- Pricing (services)

Consumer Experience:

- Front desk
- Venue
- Ease of booking
- Amenities
- Recommendations from aesthetician (products/regimen)
- Others (relaxation area, sauna)

Retailing Experience:

- Pricing (product/services)
- Ability to purchase through online retailers (products/brands)
- Interactive shopping experience (merchandising displays/test products)
- Path to purchase (replenishing through retail channel or through spa/physician)
- Frequency of purchase of products/treatments
- Sources of information to help make purchasing decisions



Scope

Professional Skin Care: U.S. Consumer Attitudes and Behaviors Survey provides brand marketers and professional skin care dispensing outlets with an objective view of how consumers perceive the professional skin care offerings in the market today and how well they are meeting consumers' needs and interests. Our research shows what is important to the consumer as it relates to professional skin care and help subscribers understand what is driving their purchase decisions.

- Consumers purchasing professional skin care products and seeking skin care treatments through dispensing outlets.
- Visit spas and salons, plastic surgeons, dermatologists, or medical spa locations.

Key Benefits

This report assists the professional skin care marketer in identifying current opportunities to better enhance the consumer experience through their professional partners as well as establish near-term and long-term opportunities. Survey results help the professional skin care marketer understand which attributes are of the greatest importance to the consumer as well as the attributes that are not key considerations.



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 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

We Know Who to Talk to.



This study is limited to the United States and is an internet-based structured survey. The panel size for this service is approximately 500 professional skin care consumers, based on a statistically valid sample of the population. Our research engages consumers visiting physicians (dermatologists, plastic surgeons, medical spas, and other physicians), beauty institutes, spas, and salons.

A structured online survey of professional skin care treatments/products users was completed with a nationally representative sample of consumers. Of the total sample, approximately 80% consists of women and 20% men who must have received a skin care service or purchased a skin care product through a professional outlet in the last six months.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for nearly 60 years.

A FULL SPECTRUM OF SERVICES



North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277