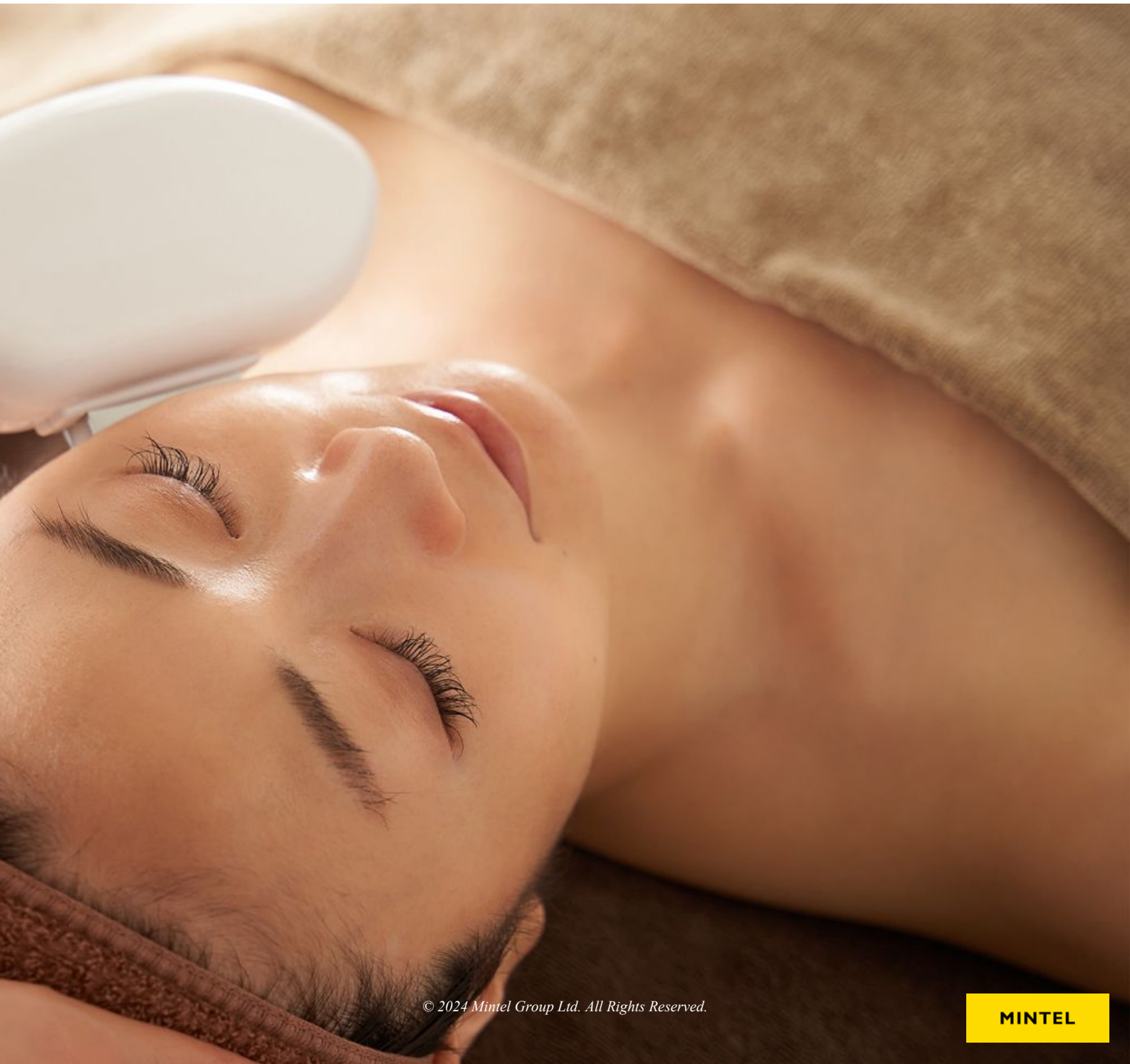


ATTITUDES TOWARDS BEAUTY AND GROOMING SERVICES – THAI CONSUMER – 2021

Lower the hygiene barrier in beauty and grooming services to regain traffic, whilst tapping into convenience and innovation that serve in-home beauty needs.



Chayapat
Ratchatawipasanan,
Principal Analyst



Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The impact of COVID-19 on beauty and grooming services in Thailand
- Self-care packaged product launches accelerate in response to people's in-home needs
 - Graph 1: beauty and personal care product launches, 2018-21

What consumers want and why

- Consumers want: safety
- Consumers want: convenience
- What consumers want: service-like experience

Opportunities

- Enhance the hygiene of beauty services' to reassure and retain customers
- Conveniently serving people's in-home needs
- Drive innovation in packaged beauty products

Competitive landscape

- Market activities

Mintel predicts

- The outlook for Thai beauty and grooming services
- The marketing mix
- Accelerate packaged beauty product launches to cater to consumers' home-based beauty activities

KEY TRENDS

- What you need to know
- Spas have been a part of Thai culture for centuries
- The pandemic placed beauty and grooming services in crisis
- Beauty services adapt to survive
- At-home service delivery provides consumers with more options
- Thai consumers' lifestyles has been limited to home-based activities
- Skincare launches accelerate to capture demand for beauty clinics
 - Graph 2: beauty and personal care product launches, 2018-21

Attitudes towards beauty and grooming services – Thai consumer – 2021

- Thailand is the third-largest APAC market for launches of 'filler' products
 - Graph 3: beauty and personal care launches carrying 'filler' claims, 2018-21
- Consumer beauty devices are widely available online

KEY DRIVERS

- Restricted inbound tourism knocks Thailand's beauty and grooming services industry
 - Graph 4: inbound tourists, 2016-20
- Beauty services offering massive discounts to replenish cashflow
- On-premise acne treatments in Thailand are popular, one-stop services
- Facial treatments are also common among Thais
- Prolonged lockdown and emergence of more variants puts Thais under pressure
- Restrictions imposed on professional services during the pandemic
- Affordable, head-to-toe beauty services
- Home beauty remedies grow in interest among Thais during lockdown

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Online dermatology clinic offers interactive consultation with doctors and experts
- Beauty salon offers DIY box set for at-home use

CONSUMER INSIGHTS

- What you need to know
- Hair styling and acne treatments are the most popular services among Thais
 - Graph 5: beauty and grooming service visits in the last 12 months, 2021
- Thais are interested in trying acne treatment, hair styling and pedicure/manicure by themselves at home
 - Graph 6: interest in beauty and grooming services, at-home vs on-premise, 2021
- Professional skills and medical technology are key factors to retain traffic
 - Graph 7: interest in beauty and grooming services, on-premise vs at-home, 2021
- Social distancing and hygiene are priorities for beauty services under the pandemic
- Key consideration factors when visiting beauty salons
- Ambience and feeling of being pampered encourage consumers to return

At-home hair salon

- Females gravitate towards hair styling during the pandemic
 - Graph 8: on-premise hair styling activity in the last 12 months, 2021
- Older females are interested in at-home hair styling; the younger generation still prefers to visit the salon
 - Graph 9: interest in hair styling, at-home vs on-premise, 2021
- Easy-to-understand instructions are key to unlocking at-home hair styling

Attitudes towards beauty and grooming services – Thai consumer – 2021

- Consumers need social activities to make the home salon feel livelier

At-home beauty clinic services

- Male Thais take action to cope with hair loss
 - Graph 10: professional hair transplant services undertaken on-premise in the last 12 months, 2021
- Target male office workers in their thirties for hair loss prevention
- Position hair growth treatment as both prevention and cure
 - Graph 11: interest in trying a hair massager to stimulate hair growth at home, 2021
- Acne treatment preference shifts from clinic to at-home
 - Graph 12: interest in beauty and grooming, at-home vs on-premise, 2021
- More than half of young males who suffer from acne have used a professional service
 - Graph 13: acne treatment service visits in the last 12 months, 2021
- Young males and middle-aged female are open to trying at-home acne treatments
 - Graph 14: interest in acne treatment, at-home vs on-premise, 2021
- Consumers prefer professional, on-premise facial treatment services, but are open to trying them at home
 - Graph 15: interest in beauty and grooming services, at-home vs on-premise, 2021
- Consumers want to feel confident performing beauty clinic-style treatments at home
 - Graph 16: top five concerns when self-administering beauty clinic treatments at home, 2021

At-home beauty spa services

- Professional beauty spa services are sought-after, but home spa activities are on the rise
 - Graph 17: interest in beauty spa activities, at-home vs on-premise, 2021
- Females are the key target for home pedicure/manicure services, as are older men
 - Graph 18: interest in at-home pedicure/manicure treatments, by gender and age, 2021
- Working-age consumers seek at-home facial massage
 - Graph 19: interest in at-home facial massage, by age, 2021
- Convenience and relaxation are required to drive at-home treatments
- Relaxing home environment and a feeling of pampering needed to enhance the at-home experience

MARKET APPLICATIONS

- Opportunities: key areas of focus

Opportunities exist in how to retain custom during the pandemic

- Visualise disinfection status to build customers' trust
- Provide protection with minimal facial cover for optimal service
- Separate the space between customers and service staff
- Leverage digital tools for online reservation and real-time queueing status
- Engage customers with take-home treatment packs

Short-term opportunities for packaged beauty products

- Provide easy-to-follow instructions
- Play with the illusion created by colour cosmetics for consumers worried about hair loss
- Enhance the home spa experience with ASMR audio
- What is ASMR?
- Demonstrate tangible results with scientific backing

Long-term opportunities for packaged beauty products

- Offer hair treatment sets to mimic the salon experience
- Holistic solutions for dermatologist-grade home acne treatments
- Products combining medical procedures and acne treatment products
- Develop medical-inspired product features and packaging
- Beauty devices and compatible skincare products
- Nail and foot maintenance with skincare benefits and relaxing scent

Who's innovating

- Local brands implementing beauty and grooming services in consumer products

Global innovations

- Foreo launches new facial skin treatment device
- Beauty device that creates a secondary skin layer

BOARDROOM CHECKLIST

- Boardroom checklist

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