

# ATTITUDES TOWARDS PROFESSIONAL BEAUTY SERVICES – GERMANY – 2020

The COVID-19 crisis looms over the professional services industry. Salons should be prepared for post-lockdown with inclusive, accessible services.



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# Report Content

## EXECUTIVE SUMMARY

### Note on COVID-19

- COVID-19's impact on professional beauty services and German consumer behaviour
- Mintel's perspective

### Market context

- Impact of COVID-19 on professional beauty service providers
- Hesitation to experiment impedes industry growth
- Hesitation to experiment impedes industry growth
- Germans are priced out of wellness

### Mintel predicts

- Treatment providers to cater to convenience

### What consumers want, and why

- Consumers want: low maintenance
  - Graph 1: top three professional hair services used, September 2019
- Consumers want: expert advice
  - Graph 2: factors for purchasing products seen at the salon/barber
- Consumers want: accessibility
- Consumers want: accessibility
- Consumers want: wellbeing
  - Graph 3: agreement with attitudes towards professional beauty/grooming services, September 2019

### Opportunities

- Move with the times
- Cater to men
- Quick Download Resources

## MARKET DRIVERS

- One in four Germans are worried about being exposed to COVID-19
  - Graph 4: worry about exposure to COVID-19, 3 March-16 March 2020 – NET worried
- Germans are equally concerned about the impact on their lifestyle
  - Graph 5: worry about impact of COVID-19 outbreak on lifestyle, 3 March-16 March 2020 – NET worried
- Salon demographic to shrink while population ages

- Disposable income growth is positive for the BPC market...
  - Graph 6: real wage growth – inflation vs disposable income, 2015-19
- ...but Germans not tempted by lifestyle inflation
- BPC service prices grow faster than in products
- BPC service prices grow faster than in products
- Body-positivity, a cultural tradition in Germany

## WHAT CONSUMERS WANT, AND WHY

### Types of professional hair services

- Germans don't take advantage of salon/barber menus
  - Graph 7: usage of professional hair services, September 2019
- Get more out of the cut/trim
- Get more out of the cut/trim
- NPD in haircare brands impacts the professional sector
- Stylists can help older women transition to grey
  - Graph 8: female usage of professional hair services by age group, NET, September 2019
- Young men motivated by barber culture
  - Graph 9: male usage of select professional hair services by age group, September 2019

### Purchase of salon/barber products

- Salons miss out on retail opportunity
- Salons miss out on retail opportunity
  - Graph 10: purchase of products seen at salon/barber, by gender, September 2019
- Expertise is the strongest purchase driver
  - Graph 11: factors for purchasing salon/barber products, September 2019
- Mintel Trend: Return to the Experts
- Mintel Trend: Sense of the Intense
- Opportunities in sensorial experience
- Get ahead with scalp benefits
- Playful pack language to sway trigger-shy consumers

### Beauty/grooming treatments experienced in spa/salon

- Beauty/grooming treatments foreign to German consumers
  - Graph 12: beauty/grooming treatments experienced in spa/salon, September 2019
- Beauty/grooming treatments foreign to German consumers
- Real usage of massage is higher
- Senior massage for pain management
- Target sensitive skin in spa/salons

- Lack of accessibility stifles engagement
- Body hair acceptance exposes how services lag behind society
- Estrid advertising reflects German sentiments to body hair

### Treatment locations visited

- Treatment usage spread across providers
  - Graph 13: locations visited for beauty/grooming treatments, September 2019
- Beauty salons get ahead
- Beauty salons get ahead
- Mintel Trend: Man in the Mirror
- Men have wide repertoire of treatment locations
  - Graph 14: treatment locations visited by men, September 2019
- Mintel Trend: Extend My Brand
- In-store treatments leverage convenience

### Attitudes towards spa/salon beauty/grooming treatments

- Treatments enhance wellbeing
  - Graph 15: attitudes towards beauty/grooming treatments, September 2019
- Treatments enhance wellbeing
- Mintel Trend: Total Wellbeing
- Professional skincare taps into wellbeing
- Partner with spas and doctor brands
- Partner with spas and doctor brands
- Rise in spa/salon NPD
- Spa positioning bodes well for body care
- Regular treatments seem daunting
- Regular treatments seem daunting
- German consumers want immersive experiences

## SALON AND TREATMENT INNOVATION

### Hair salon

- Treatwell helps salons grow new business
- Salons offer price transparency
- KMS: #mystylematters campaign
- Sustainable salon initiatives
- Hair industry news

## Beauty/grooming services

- Douglas bets on treatment market
- Immersive salon experiences
- LuxFox – At home/on demand
- Treatment locations go niche
- Trending facials extend results

## APPENDIX

### Appendix – products covered, abbreviations and consumer research methodology

- Products and services covered in this report
- Abbreviations
- Consumer research methodology

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