

PROFESSIONAL SERVICES – US – 2023

Professional beauty treatments are a part of many routines thanks to widespread availability across pricing tiers and locations, creating competition for spend.



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Professional Services - US - 2023

This report looks at the following areas:

- Market trends within the US professional services market
- Consumer engagement with select professional beauty services
- Locations visited for professional beauty services
- Future intentions of treatment and non-treatment users
- Brand preferences for products used post-treatment
- Sources of information when researching professional beauty services
- Attitudes and behaviors toward professional beauty services



Professional beauty treatments are a part of many routines thanks to widespread availability across pricing tiers and locations, creating competition for spend.

Overview

The professional services market saw a rebound after being suppressed by the COVID-19 pandemic, with a majority of adults under 45 participating in at least one professional service. While professional beauty treatments were once reserved for spas and luxury markets, med spas, retailers and lower-priced service providers are making it easy and affordable for consumers to participate.

With wider acceptance of cosmetic procedures and increased influence from social media, adults are turning toward professionals (dermatologists, aestheticians) and peers as a source of truth in determining efficacy, trustworthiness and safety of products and services associated with the market.

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A majority of adults not participating in the services market plan to keep it that way, but opportunities still exist to promote new services and at-home alternatives to certain demographics. As the market continues to evolve, a focus on convenience, holistic wellness and elevated experiences will be a top priority, all while managing the tender balance of price and innovative techniques.

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Report Content

- Definitions

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

THE MARKET

Market context

Market drivers

- Rising prices have consumers clutching their wallets for now
- However, consumers are moving back to discretionary spending
 - Graph 1: GDP percentage change based on chained 2012 dollars, as of 09/18/2023
- Federal student loan repayments may stunt BPC market growth
- Low-cost services appeal
- The juxtaposition of long-term results and instant gratification
- Beauty standards now influenced by our 'filtered' peers and selves
- Social media impacts our standards, for better or for worse
- Cosmetic surgery becomes less taboo
- Wider accessibility of services outside of traditional spas
- Are spa and wellness memberships the new gym memberships?

Market size

- Market size definition
- The market recovers post-COVID-19 pandemic
- Household spend ramps up
 - Graph 2: average annual household spending on professional services, 2018-23

COMPETITIVE STRATEGIES

- Brands showcase dermatologist-backing and acne treatments
- Dermatologists use their social platforms to drive education, treatments and product

- Telehealth connects consumers to dermatologists
- Holistic wellness for all of women's concerns
- Even with some embracing their age, 'tweakments' dominate content
- Education and accessibility of information in a fast-paced world
- A one-stop digital shop for product and services education
- In the spotlight: Ozempic's impact on the skin
- Position premium services as an investment or 'treat'
- Premium services and product concepts collide
- Immersive spas showcase the importance of elevated experiences
- Immersive experiences go viral
- Wellness treatments support beauty consumers
- The power of social connection: Wellness Social Clubs
- Med spa footprints grow, but genericization of services possible
- Capital investment drives growth in aesthetic services practices
- On-demand apps see investments, too
- Facial bars franchises focus on speed and subscription
- Men need support, too
- Support men beyond haircare
- Use beard care as a gateway

CONSUMER INSIGHTS

The professional services consumer: fast facts

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- Massage and hair removal most-used treatments
 - Graph 3: professional beauty/grooming services received in the last 12 months, 2023
- Both men and women under 45 seeking a variety of treatments
 - Graph 4: professional beauty treatments, by gender and age, 2023
- Only 1 in 5 Gen Zs and Millennials not participating in the professional services market
 - Graph 5: professional beauty/grooming services received in the last 12 months, by generation, 2023
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- Over half of those under 45 receive 3+ types of treatments
 - Graph 6: number of beauty treatments received, 2023
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 - Graph 7: select number of types of beauty treatments received in the last year, repertoire, 2023
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 - Graph 8: professional beauty/grooming services received in the last 12 months, by gender and generation, 2023

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 - Graph 9: professional hair removal services used in the last 12 months, by select gender and age, 2023
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- Q2 2023 Highlights for The Beauty Health Company
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- Brand collaborations build global awareness
- Experiential tour takes brand beyond facials
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APPENDIX

- Market definition
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- Consumer research methodology
- Generations
- Abbreviations and terms

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