

# At-home Skin Care Devices 2011:

## U.S. Market Analysis and Opportunities

**1st Edition**

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**Base Year: 2011**

Kline & Company, the authoritative source for coverage of the U.S. personal care market, offers a new report on the dynamic market for at-home skin care devices.

The report examines the non-invasive forms of at-home skin care that mimic results that were once only achieved in doctor's offices and spas. The report focuses on key trends in the use of plug-in and battery-operated hand-held devices such as lasers to treat fine lines and wrinkles, products that tone, and products that cleanse skin to perfection.

The report answers such questions as:

- Who is the market leader and why?
- Which types of devices achieve the highest sales growth?
- Is there an opportunity for topical facial treatments to be marketed in conjunction with these devices?
- Where do future opportunities lie?

## Report Scope

Kline is uniquely qualified in our ability to leverage the skills and synergies of our *Professional Skin Care* and *Cosmetics & Toiletries* reports into this new related market. We provide information on this hard-to-track consumer market. The following at-home skin care devices are covered:

- Acne elimination
- Cleansing
- Fine lines/wrinkle treatment
- Firming/toning
- Laser hair removal
- Microdermabrasion

This analysis covers consumer purchases through three basic trade classes:

- Direct (home shopping, infomercials, and the Internet)
- Luxury (department stores, specialty stores, spas, and salons)
- Mass (mass merchandisers, drug stores, and warehouse clubs)

The geographic coverage of this report is the United States. This report does not include implements, hair appliances, or waxing equipment. Devices and appliances used by physicians and aestheticians in professional outlets are also excluded. All devices analyzed in the report are power-operated.

## Key Benefits

This comprehensive report enables subscribers to identify business opportunities by analyzing the dynamics in one of the most important emerging markets of the personal care industry. Specifically, this report assists subscribers by:

- Identifying and explaining key skin care concerns that devices address in a clear and consistent fashion
- Quantifying the key areas that devices treat, such as cleansing, acne, and wrinkles
- Focusing on merchandising activities for these products through non-traditional channels
- Providing perspective on the leading players, as well as the smaller, upcoming ones
- Stimulating ideas for future partnerships/alliances

## Report Contents

### 1. INTRODUCTION

### 2. EXECUTIVE SUMMARY

*This presentation-style chapter provides an overview of key market statistics and trends, including:*

- Total industry size and growth
- Market drivers
- Retail pricing
- Competitive focus and strengths of brands
- Merchandising trends and leading retailers
- Sales breakdown by skin care concern addressed
- Sales by trade class
- Lessons learned for the future

### 3. BRAND PROFILES

*Detailed profiles are provided for approximately 15 of the leading at-home device brands, as listed in Table 1. The following information is provided:*

- Parent company overview
- Brand/product description
- Sales for 2010 and 2011
- Key skin care concern that product addresses
- Product claims
- Marketing and merchandising activities
- Distribution
- Outlook to 2016

**Table 1: List of Brands Profiled**

Brand (Product)	Company
Bliss Inc.	Steiner Leisure
Clarisonic	Pacific Bioscience Laboratories
Claro	Solta Medical, Inc.
Crystalift	BioRenew Labs
DDF Revolve 400X Micro-Polishing System	Procter & Gamble
Galvanic Spa	NuSkin Enterprises
LightStim	LightStim International
Neutrogena	Johnson & Johnson
No!No!	Radiancy Inc.
NuBrilliance	Emson USA
NuFace	Carol Cole Company
Olay Pro X Cleansing System	Procter & Gamble
Omnilux	PhotoMedex
PaloVia	Palomar Medical Technology
Quasar	Quasar Bio-Tech
Silk'n	Home Skinnovations Ltd.
Tända	Syneron Medical
TRIA	TRIA Beauty Inc.
Zeno	Zeno Corporation

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## Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including retail executives, category managers, buyers, store/counter managers, distributors, sales representatives, manufacturers, and marketers in the beauty industry.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research represents the bulk of our research efforts. In addition, this analysis is supplemented by secondary research drawn from the review of annual reports, 10Ks, company literature and other reports, trade publications, and non-confidential information from Kline's extensive database. Extensive store and website checks will also be conducted to obtain information on product selection and availability, display and sales techniques, and other merchandising trends. Kline's *Professional Skin Care* and *Cosmetics & Toiletries USA* reports are used as supplemental information.

## Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. 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 over 50 years.

Kline's research and consulting services extend across the entire personal care value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at [sales@klinegroup.com](mailto:sales@klinegroup.com), visit our website at [www.KlineGroup.com](http://www.KlineGroup.com), or contact us at any of our regional offices listed below.

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### Asia

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### India

+91-124-4546-100

### Recently published or in-progress research for the Personal Care industry includes:

- Cosmetics & Toiletries
- Beauty Retailing USA
- Natural Personal Care
- Personal Care: U.S. Competitor Cost Structures
- Professional Skin Care
- Salon Hair Care