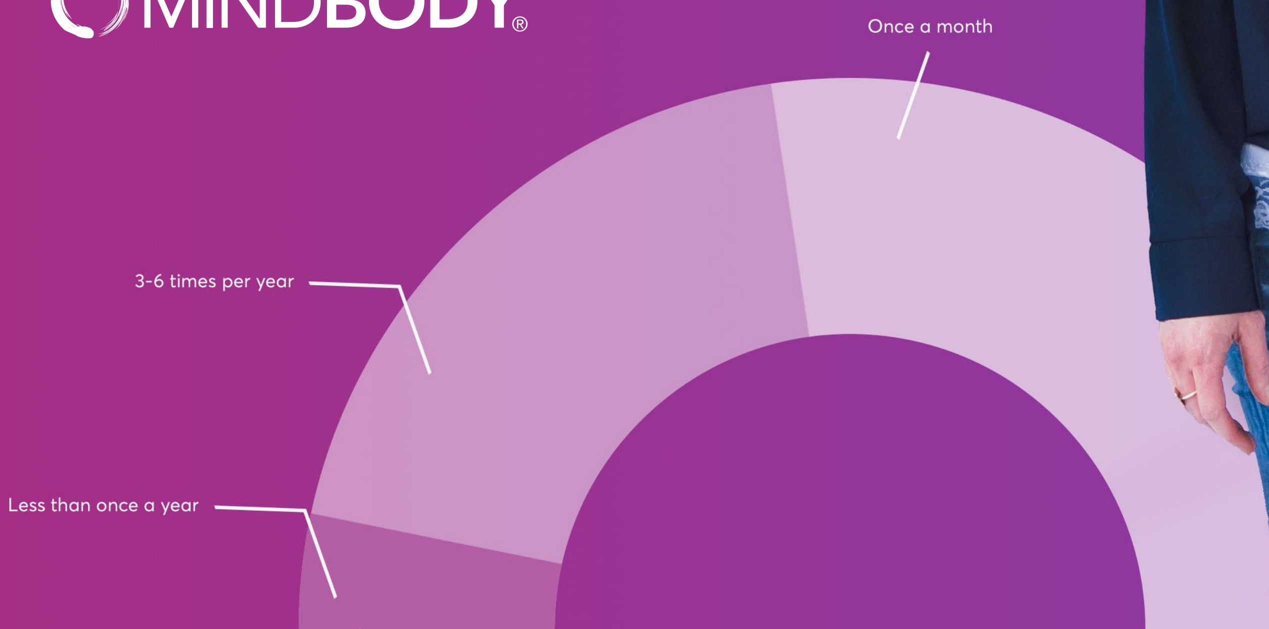
2019 MINDBODY Wellness Index Report

Beauty in America:

behaviors, attitudes, and trends

MINDBODY®



About the MINDBODY Wellness Index

The MINDBODY Wellness Index measures the strength of wellness marketplaces in a geographic region by analyzing business success factors—and consumer behaviors and attitudes—in the fitness, beauty, and integrative health industries.

With more than 67,000* businesses and 58 million* consumers globally, MINDBODY is uniquely positioned to offer insight into the relationship between the two. The MINDBODY Wellness Index is a proprietary statistical scoring algorithm that incorporates Metropolitan Statistical Area (MSA) level anonymized and aggregated data from the MINDBODY marketplace, third-party data from sources such as the US Census, Google and other business listing services, and data from a large-scale MINDBODY consumer survey covering the largest 50 MSAs in the US.

Nearly 17,000 individuals participated in a 16-minute online survey between Oct. 26 and Nov. 12, 2018. Survey participants spanned the ages of 18 to 65, with a mean age of 39. The sample was 49% male and 51% female. Seventy participants, or 0.4%, self-identify as an alternate gender. Due to low base size, this data isn't included in gender comparisons.

In addition to the flagship The MINDBODY Wellness Index: Understanding the State of the Wellness Industry in America report, there are additional reports in the series that offer deeper insights into findings in fitness, integrative health, and beauty. Wellness providers can look at these trends to understand clients' needs and better support their goals.

Beauty and grooming are important to overall wellness, as they support health across different dimensions, particularly emotional wellness.

*As of September 30, 2018.

Men and women prioritize beauty and grooming services about equally

A notable number of Americans (39%) say they prioritize beauty and grooming services, including: hair cutting, styling, waxing, barber, nail, facial, and skin care. Around 42% try to prioritize when they can, while 18% say these services are low-priority.

Priorities for these services vary greatly across age and gender. Younger people, ages 18–25, place a higher value on beauty services (46% men, 48% women) than older age groups (≤42%). In addition, significantly more men place a low priority on these services.

Because of these age and gender differences, business owners will need to carefully target their messaging—tailoring the right service to the right audience.

Figure 3.1

Relationship with beauty and grooming

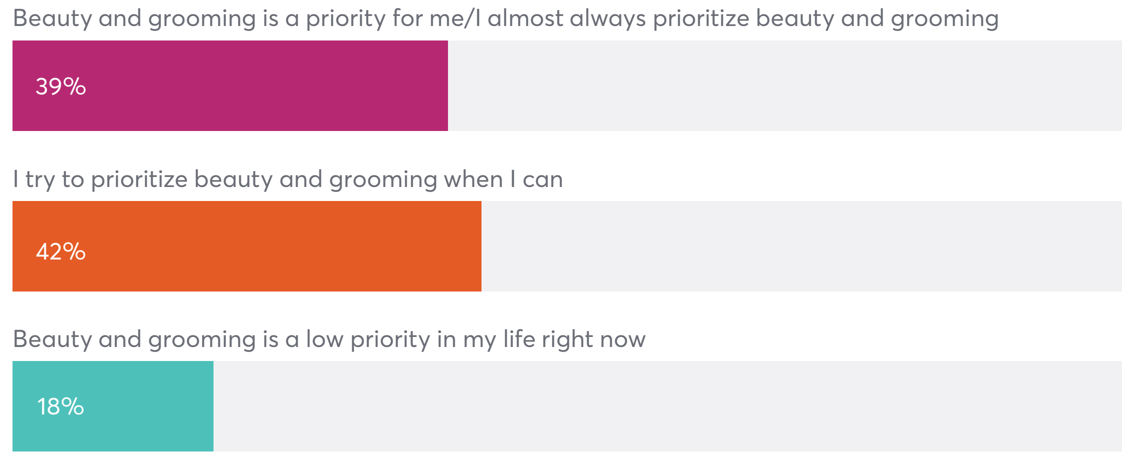
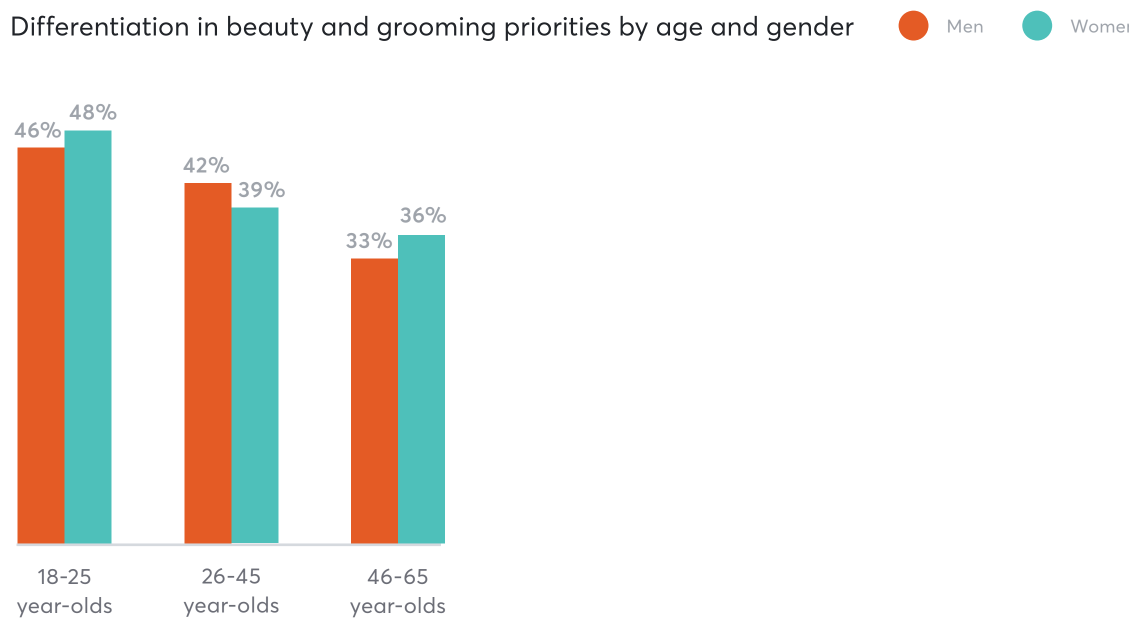


Figure 3.2

Differentiation in beauty and grooming priorities by age and gender



Beauty and grooming services are a high priority

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Frequency and spend on beauty and grooming services: 26-45 year-olds spend the most

In general, men engage in basic grooming more often than women. While women don't get beauty services as often (about once every three months), they regularly spend significantly more per occasion—especially on beauty services like manicures and pedicures, hair coloring and styling, and eyebrow waxing or threading.

A larger percentage of men also claim to rarely or never engage in beauty and grooming services than women. When they do engage in services, however, it's far more frequently, especially for haircuts/barber services.

Despite many 18-25 year-olds prioritizing beauty, they spend less per month than older age groups—though they actually spend the highest percentage of their income. Forty-six to 65 year-olds spend the lowest percentage.

Figure 3.3

Frequency of beauty and grooming services by gender

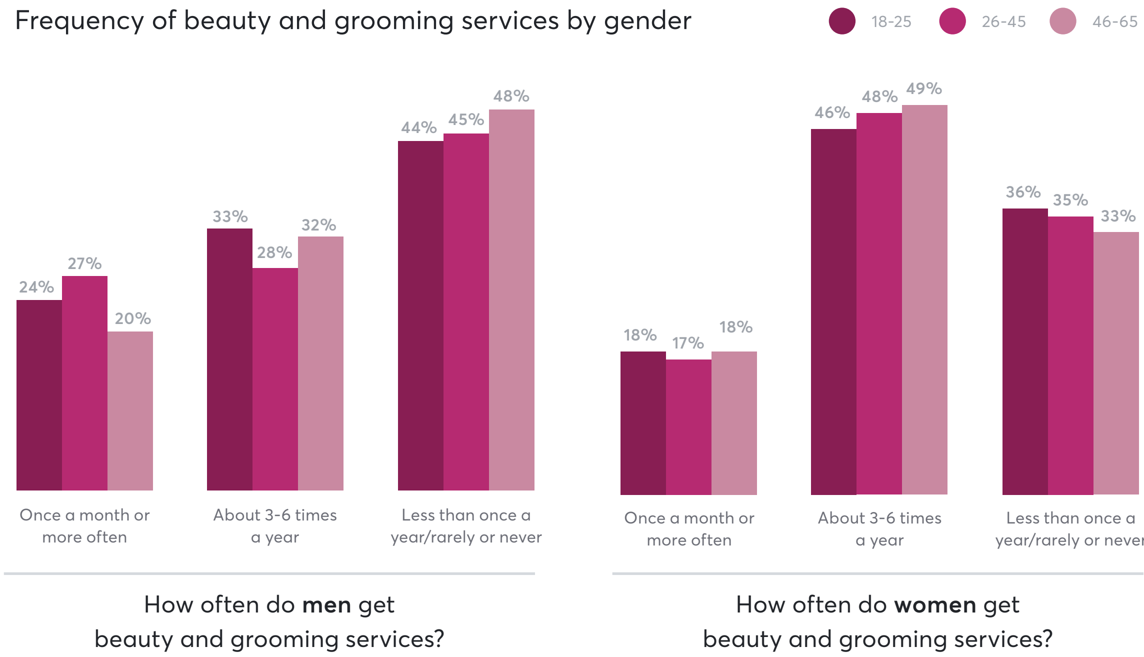
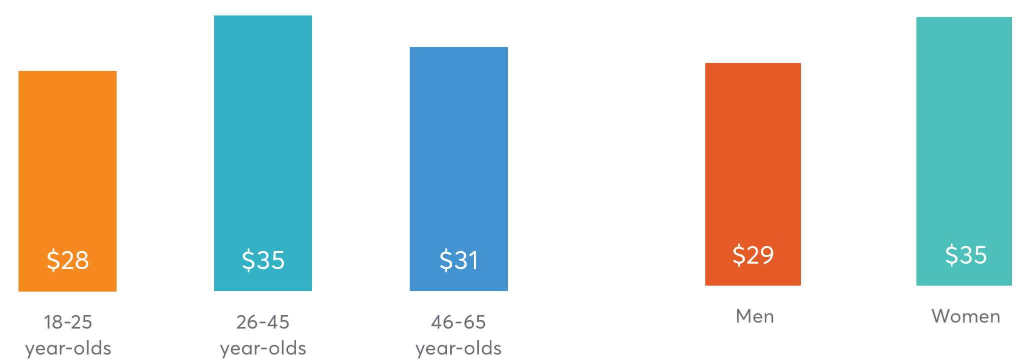


Figure 3.4

Average monthly spend on beauty and grooming services by gender and age



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Top beauty and grooming services for women: 59% got a manicure or pedicure in the past year

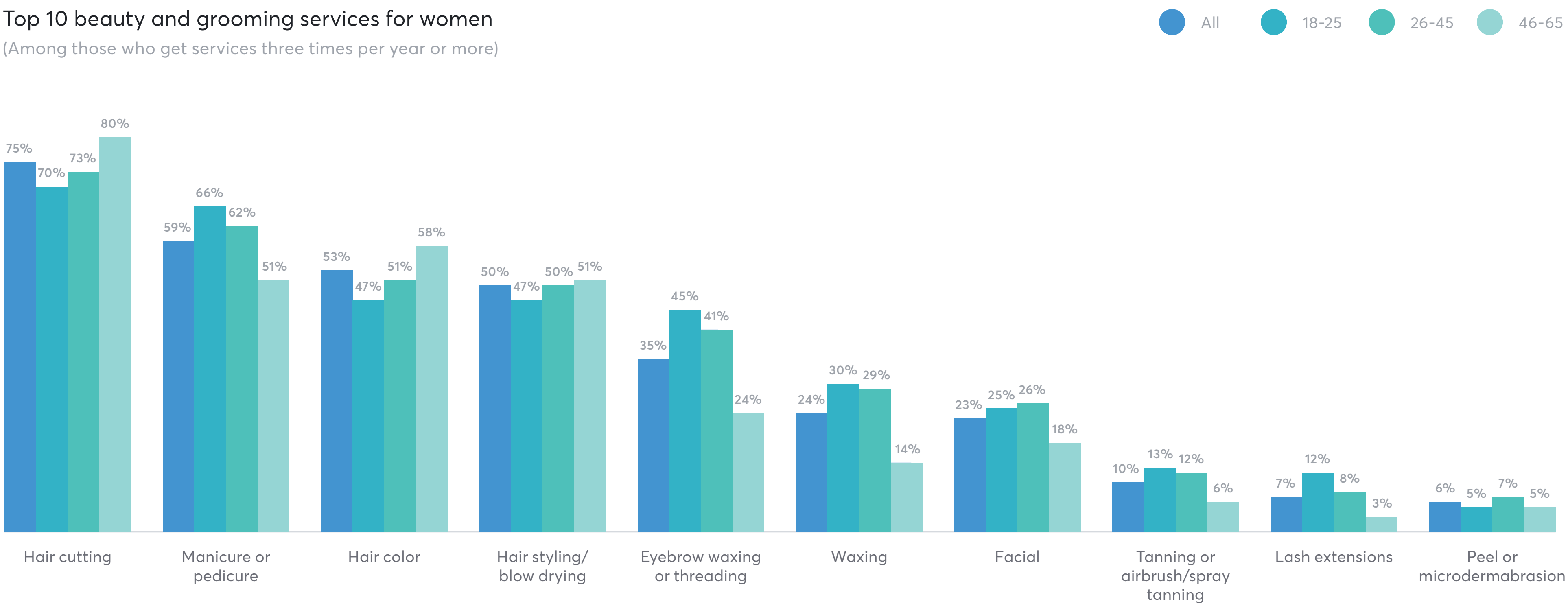
The services women are currently using tend to differ across age groups. While 46–65 year-olds lead in hair cutting and color, higher percentages of the other two age groups tend to get manicures or pedicures, eyebrow waxing or threading, and body waxing.

Hair styling and blow drying is equally appealing to all three age groups. Half of all women received this beauty service in the past year.

Figure 3.5

Top 10 beauty and grooming services for women

(Among those who get services three times per year or more)



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Top beauty and grooming services for men: haircuts and barber services are the most popular

Haircuts and barber services topped the list for men last year. Sixteen percent of men had a blow dry/style service, 16% got a manicure or pedicure, and 14% got a facial.

Forty-six to 65 year-old men have the highest percentage who have gotten a haircut in the past year. This is the only category in which they have the highest engagement.

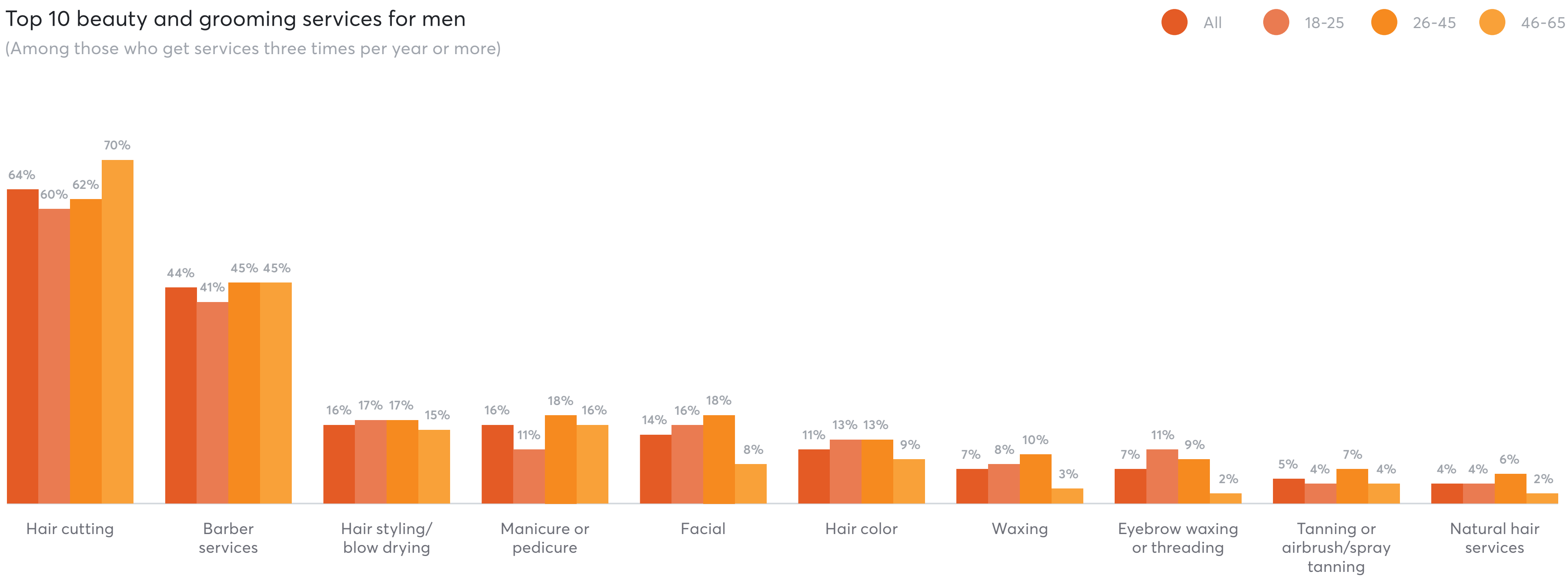
The 26-45 year-old group leads in manicures or pedicures, facials, waxing, tanning or airbrush/spray tanning, and natural hair services.

Similar to young women, young men are also more likely to invest in eyebrow waxing/threading.

Figure 3.6

Top 10 beauty and grooming services for men

(Among those who get services three times per year or more)



Upcoming beauty and grooming trends: facials are the number one service Americans want to try next

Although the next big trends in beauty and grooming services vary by age and gender, facials top the list for all groups except men ages 46–65, followed by barber services. American Spa reported that facials/skincare services were top-grossing spa services.[1]

Mud and detox body wraps are appealing to men and women alike, with more interest from younger customers. Laser hair removal is another popular option. The global market for laser hair removal is expected to reach $1.35 billion in 2022, with a compound annual growth rate of 9%.[2]

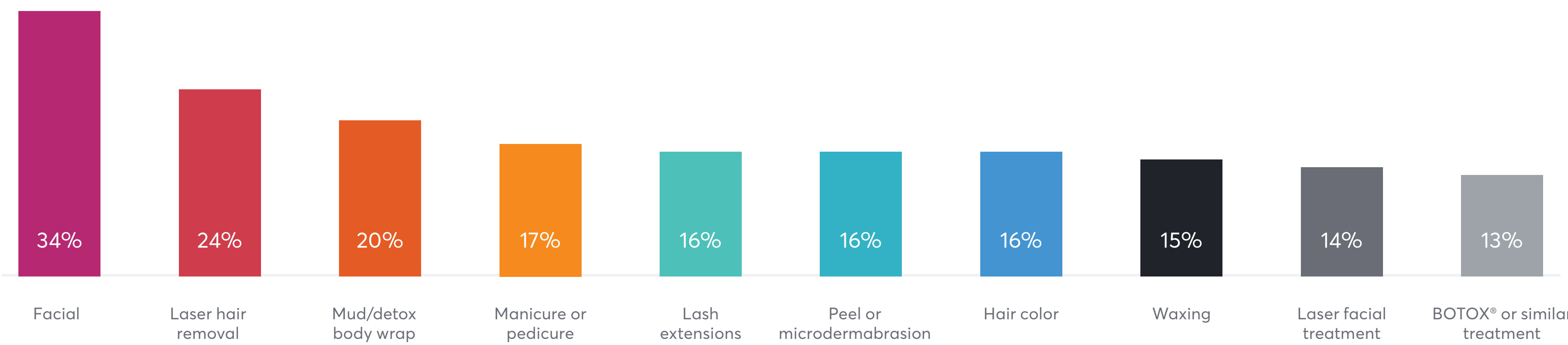
A higher percentage of women ages 18–25 want to try manicure and pedicure services, hair styling, and blow drying. In 2017, blow-dry bars and salons saw 25% year-over-year growth—with nearly $7 billion in service sales and $2 billion in retail sales.[3] Botulinum toxin, the material injected in BOTOX® procedures, had a global market estimate of $3.4 billion in 2015, and is predicted to grow at a rate of 7.9% through 2025.[4] Botox has found its way to the top 10 services 26-65 year-olds would like to try next.

The top services men want to try are mostly consistent across age groups. However, men ages 46–65 tend to prefer peels or microdermabrasions, while younger age groups prefer laser facial treatments. The global market for microdermabrasions is estimated to reach over $802 million by 2023—a nearly $200 million increase since 2016.[5] For the global aesthetics laser market, the value is predicted to reach $1.8 billion by 2024.[6]

Figure 3.7

Upcoming 2019 Beauty and grooming trends: top 10 beauty services Americans are interested in trying next

(Among those who get services and are interested, including all ages and genders)



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Top 10 beauty services women want to try next: laser hair removal makes the top three for all ages

Figure 3.8

What services do 18-25 year-olds want to try next?
(Among those who get services and are interested)

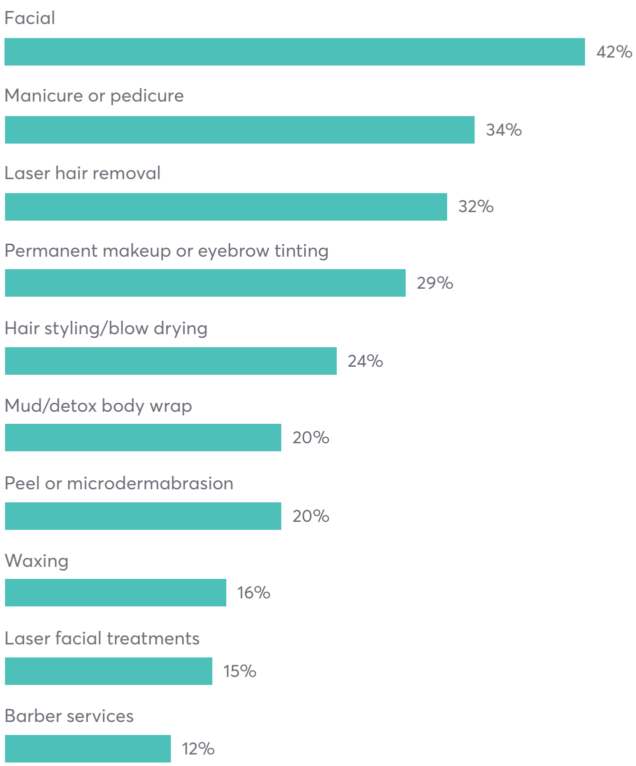


Figure 3.9

What services do 26-45 year-olds want to try next?
(Among those who get services and are interested)

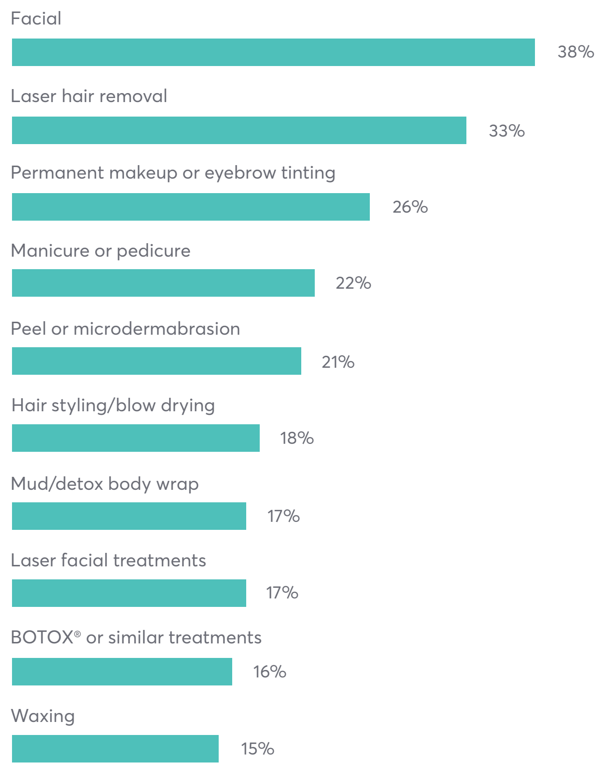
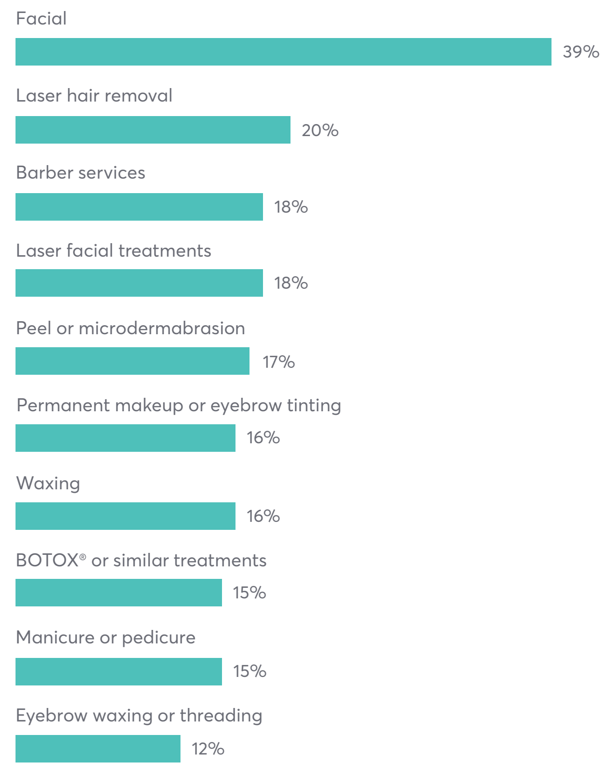


Figure 3.10

What services do 46-65 year-olds want to try next?
(Among those who get services and are interested)



Top 10 beauty services men want to try next: a quarter of men want to try facials

Figure 3.11

What services do 18-25 year-olds want to try next?

(Among those who get services and are interested)

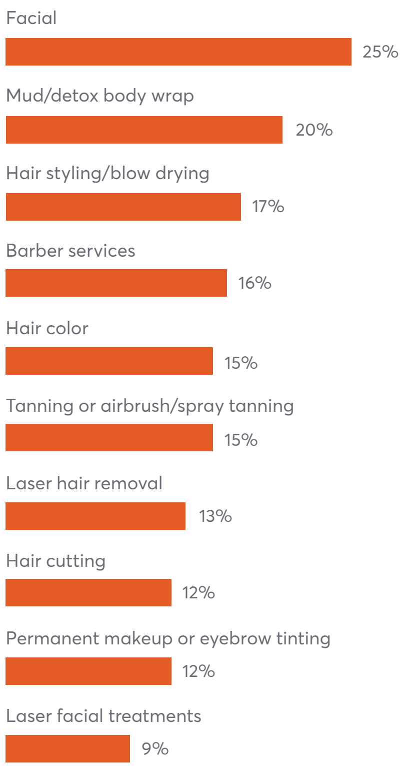


Figure 3.12

What services do 26-45 year-olds want to try next?

(Among those who get services and are interested)

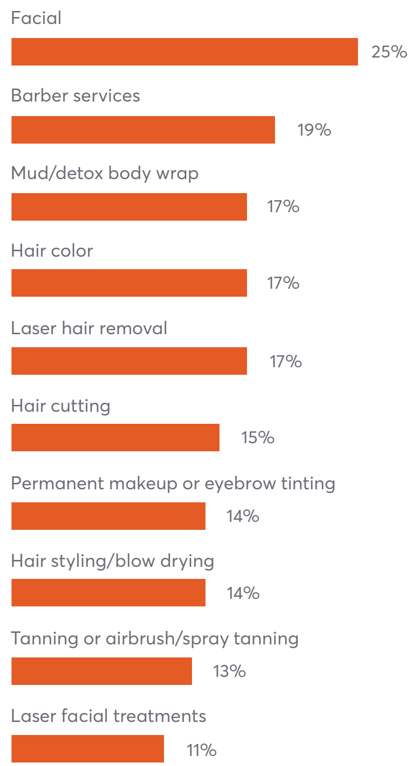
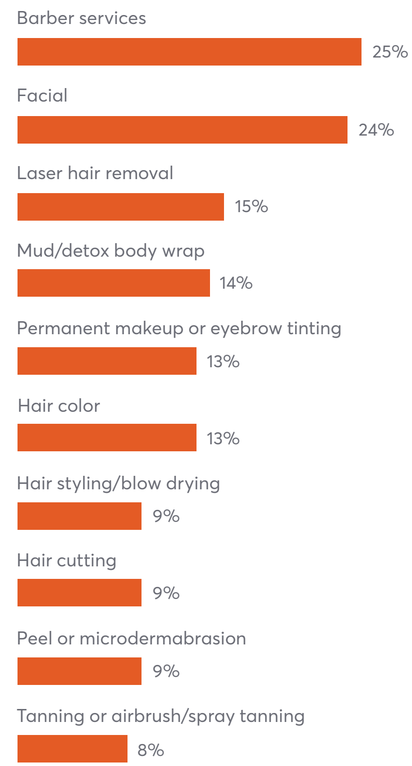


Figure 3.13

What services do 46-65 year-olds want to try next?

(Among those who get services and are interested)



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Profile: the typical beauty and grooming client

Consumers who make beauty and grooming services a habit are important clients for salons, spas, and barbershops. Beauty and grooming businesses need to target their marketing to consumers who will be repeat customers. Knowing who routinely gets services can help inform marketing efforts. On this page is a profile of the consumers who get beauty and grooming services three or more times per year.

Compared to the average consumer, typical beauty and grooming consumers, those who get services three or more times per year, are more likely to hold a college or advanced degree (45% compared to 39%).

In addition to spending more on beauty services every year, ($540 versus $387), typical beauty consumers also spend more on fitness ($336 versus $255). The trend of spending more than the average consumer continues into integrative health (which includes services like massage, chiropractic, acupuncture, and others) as well, with $348 compared to $263.

Figure 3.14

Who is the typical beauty and grooming consumer?

Average age	40

Employment status

Student	12%
Working	67%
Retired	9%
Not Working	18%

Gender

Female	59%
Male	40%

Marital status

Single	35%
Living with partner	11%
Married	44%
Separated	2%
Divorced/widowed	10%

Education

Up to high school	27%
Trade/technical school	11%
Associate's degree	17%
Bachelor's degree	32%
Advanced degree (Master's, PhD, etc.)	13%

Mean household income	$69,100

How much are they spending on health and wellness each year?

Fitness	$540
Beauty	$336
Integrative Health	$348
Total	**$1,224**

Single people and unmarried, cohabitating couples prioritize beauty and grooming more than married and divorced/widowed Americans

Single people or cohabitating couples are, on average, more likely to prioritize their self-care through beauty and grooming services. About 43-44% of single people and people living with their partner say beauty and grooming is a priority or they almost always prioritize it. Meanwhile, only 36% of those married, 40% of those separated, and 37% of those divorced or widowed say the same.

Increased percentages of married, separated, and divorced or widowed Americans report that beauty and grooming is a low priority in life right now.

Parents and those without children tend to prioritize beauty and grooming similarly to one another.

Frequency of getting beauty services increases with income

The higher the household income, the higher the percentage of consumers who get beauty and grooming services regularly (at least three times a year). While 47% of consumers with a household income of less than $30,000 get at least three beauty and grooming services a year, 78% of those with household incomes over $130,000 get at least three services a year. Of course, as people get older, they tend to advance in their career and have higher income. Notably, however, the percentage of people engaging in beauty and grooming services at least three times a year is the same across all age groups, suggesting that age is less of a factor when it comes to the number of beauty services one gets.

Figure 3.15

Relationship with beauty and grooming by marital status

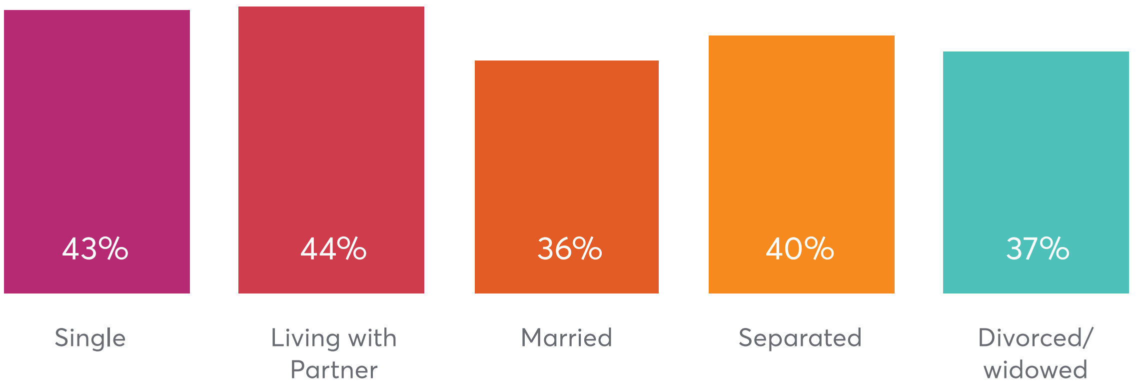
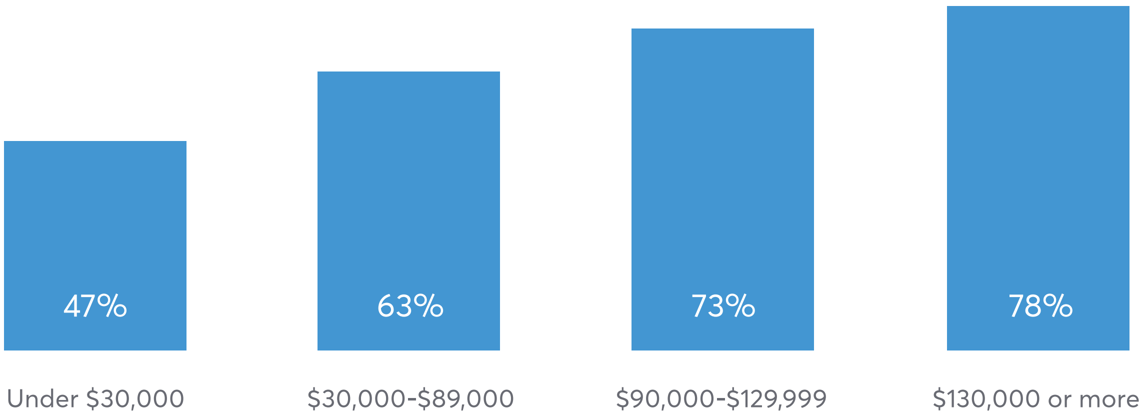


Figure 3.16

Percentage of Americans getting beauty and grooming services at least three times a year



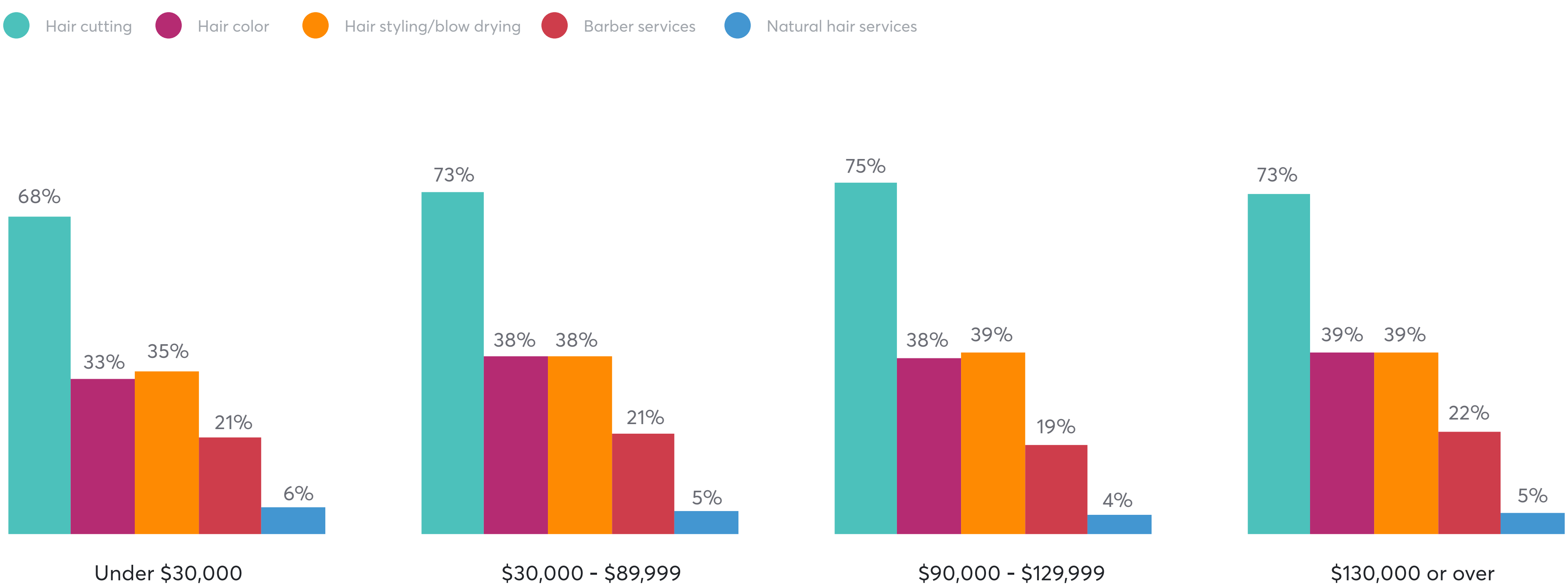
Demand for hair services, though, is relatively consistent across all household income groups

Barber services and natural hair services see nearly equivalent demand across all household incomes. Demand is consistent for hair cutting, hair coloring, and hair styling for those consumers with a household income of $30,000 or more. However, a lower percentage of Americans with household incomes lower than this received these services.

With hair services deviating from the correlation of more household income, more services, this may suggest that hair is seen as an expense that consumers willingly incur—regardless of income after the $30,000 threshold. It's possible that, for many, hair is an important part of one's identity (or, in the case of a haircut, a necessity), and, therefore, a non-negotiable expense. Consumers who want hair services are making room in their budgets.

Figure 3.17

Percentage of Americans receiving hair services in the past year by household income



Top beauty and grooming services: popularity by metro area

While some services are popular across the map, other services are particularly concentrated in a few metro areas.

For example, while 80.7% of Pittsburgh's regular beauty clients got a haircut in the past year, only 57% of Atlanta-Sandy-Marietta, GA's consumers did the same.

Top ten beauty and grooming services Americans engaged in by MSA

(Among those who get services three or more times per year)

Figure 3.18

Top Five   Bottom Five

Hair cutting

Pittsburgh, PA	80.7%
Minneapolis-St. Paul-Bloomington, MN-WI	77.9%
Salt Lake City, UT	77.1%
Milwaukee-Waukesha-West Allis, WI	77.0%
San Jose-Sunnyvale-Santa Clara, CA	76.8%
Dallas-Fort Worth-Arlington, TX	64.4%
Miami-Fort Lauderdale-West Palm Beach, FL	64.4%
New York-Newark-Jersey City, NY-NJ-PA	62.0%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	62.1%
Atlanta-Sandy Springs-Roswell, GA	57.0%

Manicure or pedicure

Oklahoma City, OK	50.7%
Nashville-Davidson-Murfreesboro-Franklin, TN	49.3%
New Orleans-Metairie, LA	49.1%
Sacramento-Roseville-Arden-Arcade, CA	48.8%
Richmond, VA	48.8%
Denver-Aurora-Lakewood, CO	37.3%
Cleveland-Elyria, OH	36.7%
Washington-Arlington-Alexandria, DC-VA-MD-WV	35.6%
Pittsburgh, PA	31.8%
Indianapolis-Carmel-Anderson, IN	29.5%

Hair styling/blow drying

Memphis, TN-MS-AR	46.4%
New Orleans-Metairie, LA	44.8%
New York-Newark-Jersey City, NY-NJ-PA	44.0%
Louisville-Jefferson County, KY-IN	43.0%
Jacksonville, FL	42.1%
Riverside-San Bernardino-Ontario, CA	30.1%
San Antonio-New Braunfels, TX	29.1%
Atlanta-Sandy Springs-Roswell, GA	29.0%
Sacramento-Roseville-Arden-Arcade, CA	28.0%
San Diego-Carlsbad, CA	23.9%

Hair color

New York-Newark-Jersey City, NY-NJ-PA	45.0%
St. Louis, MO-IL	45.0%
Nashville-Davidson-Murfreesboro-Franklin, TN	42.4%
New Orleans-Metairie, LA	42.3%
Buffalo-Cheektowaga-Niagara Falls, NY	41.9%
Washington-Arlington-Alexandria, DC-VA-MD-WV	29.8%
Seattle-Tacoma-Bellevue, WA	29.8%
Austin-Round Rock, TX	29.7%
Atlanta-Sandy Springs-Roswell, GA	29.5%
Houston-The Woodlands-Sugar Land, TX	28.9%

Eyebrow waxing or threading

Oklahoma City, OK	30.8%
Richmond, VA	30.8%
New York-Newark-Jersey City, NY-NJ-PA	30.0%
Memphis, TN-MS-AR	29.3%
Nashville-Davidson-Murfreesboro-Franklin, TN	29.0%
San Diego-Carlsbad, CA	18.7%
Portland-Vancouver-Hillsboro, OR-WA	17.9%
Buffalo-Cheektowaga-Niagara Falls, NY	17.8%
Denver-Aurora-Lakewood, CO	17.5%
Cleveland-Elyria, OH	16.9%

Barber services

Orlando-Kissimmee-Sanford, FL	32.2%
Houston-The Woodlands-Sugar Land, TX	26.4%
San Diego-Carlsbad, CA	26.1%
Charlotte-Concord-Gastonia, NC-SC	24.3%
Cleveland-Elyria, OH	24.3%
San Jose-Sunnyvale-Santa Clara, CA	15.8%
Salt Lake City, UT	15.4%
Richmond, VA	15.4%
Raleigh, NC	13.7%
Minneapolis-St. Paul-Bloomington, MN-WI	12.2%

Facial

New York-Newark-Jersey City, NY-NJ-PA	30.0%
San Francisco-Oakland-Hayward, CA	28.7%
Las Vegas-Henderson-Paradise, NV	27.1%
Los Angeles-Long Beach-Anaheim, CA	26.9%
San Jose-Sunnyvale-Santa Clara, CA	26.6%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	14.0%
Columbus, OH	12.9%
Milwaukee-Waukesha-West Allis, WI	12.0%
Buffalo-Cheektowaga-Niagara Falls, NY	11.0%
Birmingham-Hoover, AL	11.0%

Waxing

New York-Newark-Jersey City, NY-NJ-PA	30.0%
Miami-Fort Lauderdale-West Palm Beach, FL	24.1%
New Orleans-Metairie, LA	23.9%
Memphis, TN-MS-AR	23.8%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	21.3%
San Antonio-New Braunfels, TX	12.6%
Birmingham-Hoover, AL	12.6%
Pittsburgh, PA	11.5%
Orlando-Kissimmee-Sanford, FL	10.9%
Tampa St.-Petersburg-Clearwater, FL	10.6%

Tanning or airbrush/spray tanning

Louisville-Jefferson County, KY-IN	14.5%
Birmingham-Hoover, AL	14.3%
Seattle-Tacoma-Bellevue, WA	14.0%
Indianapolis-Carmel-Anderson, IN	14.0%
Oklahoma City, OK	13.9%
Orlando-Kissimmee-Sanford, FL	4.3%
Washington-Arlington-Alexandria, DC-VA-MD-WV	4.2%
Riverside-San Bernardino-Ontario, CA	4.1%
Hartford-West Hartford-East Hartford, CT	3.6%
Miami-Fort Lauderdale-West Palm Beach, FL	3.2%

Lash extensions

New York-Newark-Jersey City, NY-NJ-PA	12.0%
Memphis, TN-MS-AR	11.0%
Salt Lake City, UT	10.6%
Las Vegas-Henderson-Paradise, NV	9.4%
Dallas-Fort Worth-Arlington, TX	8.2%
Indianapolis-Carmel-Anderson, IN	2.5%
Louisville-Jefferson County, KY-IN	2.1%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	1.7%
Portland-Vancouver-Hillsboro, OR-WA	1.7%
Pittsburgh, PA	1.6%

Top beauty and grooming services: interest in trying next by metro area

The following charts show the top ten beauty and grooming services Americans are interested in trying next (as seen on page seven). The top five MSAs indicate where the most consumers are looking to try a given service. In the Philadelphia area, 44.3% of frequent beauty consumers are interested in trying facials. The bottom five MSAs indicate the areas where people are least interested in trying a particular service. Only 24.9% of regular beauty and grooming consumers in the Miami area want to give facials a try.

Top ten beauty and grooming services Americans are interested in trying next by MSA

(Among those who get services three or more times per year)

Figure 3.19

Top Five Bottom Five

Facial

Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	44.3%
Minneapolis-St. Paul-Bloomington, MN-WI	43.6%
Baltimore-Columbia-Towson, MD	42.0%
Milwaukee-Waukesha-West Allis, WI	40.0%
Raleigh, NC	39.7%
Portland-Vancouver-Hillsboro, OR-WA	29.2%
Providence-Warwick, RI-MA	28.2%
Tampa St.-Petersburg-Clearwater, FL	27.0%
San Antonio-New Braunfels, TX	26.0%
Miami-Fort Lauderdale-West Palm Beach, FL	24.9%

Laser hair removal

Salt Lake City, UT	35.2%
Louisville-Jefferson County, KY-IN	35.0%
Oklahoma City, OK	32.9%
Nashville-Davidson-Murfreesboro-Franklin, TN	31.0%
Austin-Round Rock, TX	29.4%
Cleveland-Elyria, OH	17.9%
San Diego-Carlsbad, CA	17.8%
Chicago-Naperville-Elgin, IL-IN-WI	17.2%
Washington-Arlington-Alexandria, DC-VA-MD-WV	16.8%
Detroit-Warren-Dearborn, MI	16.8%

Mud/detox body wrap

Memphis, TN-MS-AR	28.0%
Austin-Round Rock, TX	25.2%
San Francisco-Oakland-Hayward, CA	25.0%
Denver-Aurora-Lakewood, CO	24.9%
Cincinnati, OH-KY-IN	24.8%
Buffalo-Cheektowaga-Niagara Falls, NY	14.8%
Washington-Arlington-Alexandria, DC-VA-MD-WV	14.8%
Miami-Fort Lauderdale-West Palm Beach, FL	14.4%
Los Angeles-Long Beach-Anaheim, CA	14.3%
Orlando-Kissimmee-Sanford, FL	14.3%

Manicure or pedicure

Minneapolis-St. Paul-Bloomington, MN-WI	25.5%
Charlotte-Concord-Gastonia, NC-SC	22.9%
Houston-The Woodlands-Sugar Land, TX	22.8%
Louisville-Jefferson County, KY-IN	22.3%
Phoenix-Mesa-Scottsdale, AZ	22.0%
Oklahoma City, OK	12.6%
Baltimore-Columbia-Towson, MD	12.3%
Sacramento-Roseville-Arden-Arcade, CA	12.0%
Miami-Fort Lauderdale-West Palm Beach, FL	10.5%
New Orleans-Metairie, LA	6.9%

Lash extensions

Nashville-Davidson-Murfreesboro-Franklin, TN	24.0%
Salt Lake City, UT	21.6%
Providence-Warwick, RI-MA	21.2%
Kansas City, MO-KS	20.5%
Riverside-San Bernardino-Ontario, CA	20.0%
Tampa St.-Petersburg-Clearwater, FL	11.6%
Raleigh, NC	11.6%
Hartford-West Hartford-East Hartford, CT	11.3%
Orlando-Kissimmee-Sanford, FL	10.7%
Jacksonville, FL	10.4%

Peel or microdermabrasion

San Jose-Sunnyvale-Santa Clara, CA	22.7%
Oklahoma City, OK	21.6%
Houston-The Woodlands-Sugar Land, TX	21.1%
Nashville-Davidson-Murfreesboro-Franklin, TN	21.1%
Phoenix-Mesa-Scottsdale, AZ	20.5%
Cincinnati, OH-KY-IN	12.8%
Chicago-Naperville-Elgin, IL-IN-WI	12.8%
San Francisco-Oakland-Hayward, CA	12.5%
Riverside-San Bernardino-Ontario, CA	12.5%
Washington-Arlington-Alexandria, DC-VA-MD-WV	8.7%

Hair color

New Orleans-Metairie, LA	23.1%
Chicago-Naperville-Elgin, IL-IN-WI	22.2%
Charlotte-Concord-Gastonia, NC-SC	21.7%
Raleigh, NC	21.2%
Minneapolis-St. Paul-Bloomington, MN-WI	20.0%
Louisville-Jefferson County, KY-IN	12.7%
Orlando-Kissimmee-Sanford, FL	11.9%
San Antonio-New Braunfels, TX	11.6%
Buffalo-Cheektowaga-Niagara Falls, NY	11.1%
Virginia Beach-Norfolk-Newport News, VA-NC	10.1%

Waxing

Chicago-Naperville-Elgin, IL-IN-WI	20.0%
Atlanta-Sandy Springs-Roswell, GA	19.8%
Sacramento-Roseville-Arden-Arcade, CA	19.5%
Cincinnati, OH-KY-IN	19.5%
Houston-The Woodlands-Sugar Land, TX	19.3%
Tampa St.-Petersburg-Clearwater, FL	11.6%
Miami-Fort Lauderdale-West Palm Beach, FL	11.6%
Riverside-San Bernardino-Ontario, CA	10.6%
Hartford-West Hartford-East Hartford, CT	10.6%
Jacksonville, FL	9.8%

Laser facial treatments

Phoenix-Mesa-Scottsdale, AZ	23.6%
Salt Lake City, UT	22.2%
Oklahoma City, OK	22.2%
Sacramento-Roseville-Arden-Arcade, CA	21.1%
Los Angeles-Long Beach-Anaheim, CA	20.6%
Richmond, VA	9.1%
St. Louis, MO-IL	8.4%
Chicago-Naperville-Elgin, IL-IN-WI	8.3%
Buffalo-Cheektowaga-Niagara Falls, NY	8.1%
Detroit-Warren-Dearborn, MI	7.8%

BOTOX® or similar treatments

New York-Newark-Jersey City, NY-NJ-PA	20.0%
Phoenix-Mesa-Scottsdale, AZ	18.9%
Birmingham-Hoover, AL	18.4%
San Francisco-Oakland-Hayward, CA	17.9%
Las Vegas-Henderson-Paradise, NV	17.4%
Milwaukee-Waukesha-West Allis, WI	8.5%
Tampa St.-Petersburg-Clearwater, FL	7.9%
Orlando-Kissimmee-Sanford, FL	7.1%
Raleigh, NC	5.8%
St. Louis, MO-IL	5.8%

New York City spends the most on beauty and grooming

Out of the top 50 MSAs, New York-Newark-Jersey City, NY-NJ-PA spends the most on beauty and grooming services. The average yearly spend in the New York City metro area is $638, or $53/month. Louisville-Jefferson County, KY-IN spends the least, with an average of $293/year, or $24/month.

The average spend among the top 50 MSAs is $387/year, or $32/month.

Figure 3.20

Yearly spend on beauty and grooming services by MSA

1	New York-Newark-Jersey City, NY-NJ-PA	$638
2	Miami-Fort Lauderdale-West Palm Beach, FL	$524
3	Boston-Cambridge-Newton, MA-NH	$478
4	San Francisco-Oakland-Hayward, CA	$473
5	Washington-Arlington-Alexandria, DC-VA-MD-WV	$465
6	Los Angeles-Long Beach-Anaheim, CA	$460
7	Las Vegas-Henderson-Paradise, NV	$455
8	Austin-Round Rock, TX	$449
9	New Orleans-Metairie, LA	$447
10	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	$430
11	San Jose-Sunnyvale-Santa Clara, CA	$428
12	Atlanta-Sandy Springs-Roswell, GA	$421
13	Richmond, VA	$421
14	Houston-The Woodlands-Sugar Land, TX	$416
15	Nashville-Davidson-Murfreesboro-Franklin, TN	$416
16	Memphis, TN-MS-AR	$406
17	Raleigh, NC	$397
18	Hartford-West Hartford-East Hartford, CT	$391
19	Dallas-Fort Worth-Arlington, TX	$390
20	Chicago-Naperville-Elgin, IL-IN-WI	$388
21	San Diego-Carlsbad, CA	$386
22	Oklahoma City, OK	$380
23	Seattle-Tacoma-Bellevue, WA	$378
24	Baltimore-Columbia-Towson, MD	$372
25	Charlotte-Concord-Gastonia, NC-SC	$372
26	St. Louis, MO-IL	$370
27	Tampa St.-Petersburg-Clearwater, FL	$368
28	Orlando-Kissimmee-Sanford, FL	$367
29	Kansas City, MO-KS	$364
30	Denver-Aurora-Lakewood, CO	$363
31	Detroit-Warren-Dearborn, MI	$362
32	San Antonio-New Braunfels, TX	$358
33	Virginia Beach-Norfolk-Newport News, VA-NC	$357
34	Providence-Warwick, RI-MA	$356
35	Birmingham-Hoover, AL	$354
36	Sacramento-Roseville-Arden-Arcade, CA	$351
37	Jacksonville, FL	$350
38	Cleveland-Elyria, OH	$346
39	Minneapolis-St. Paul-Bloomington, MN-WI	$346
40	Salt Lake City, UT	$344
41	Milwaukee-Waukesha-West Allis, WI	$343
42	Indianapolis-Carmel-Anderson, IN	$337
43	Phoenix-Mesa-Scottsdale, AZ	$336
44	Cincinnati, OH-KY-IN	$335
45	Riverside-San Bernardino-Ontario, CA	$331
46	Pittsburgh, PA	$323
47	Columbus, OH	$321
48	Buffalo-Cheektowaga-Niagara Falls, NY	$321
49	Portland-Vancouver-Hillsboro, OR-WA	$313
50	Louisville-Jefferson County, KY-IN	$293

More engaged in beauty and grooming services, more engaged in healthy habits

Those who are more engaged in beauty are more engaged in other beneficial behaviors as well. Overall, the more often Americans report pursuing beauty and grooming services, the more likely they are to report positively across the spectrum of healthy habits and attitudes. Beauty and self-care are an important part of holistic wellness. The correlation includes positive habits like getting regular medical check-ups as well as engaging in creative and stimulating activities and having close relationships.

A higher proportion of respondents who get services three to six times a year say they do not smoke than those who get services more frequently (once a month or more). This is the only category that deviates slightly from this trend.

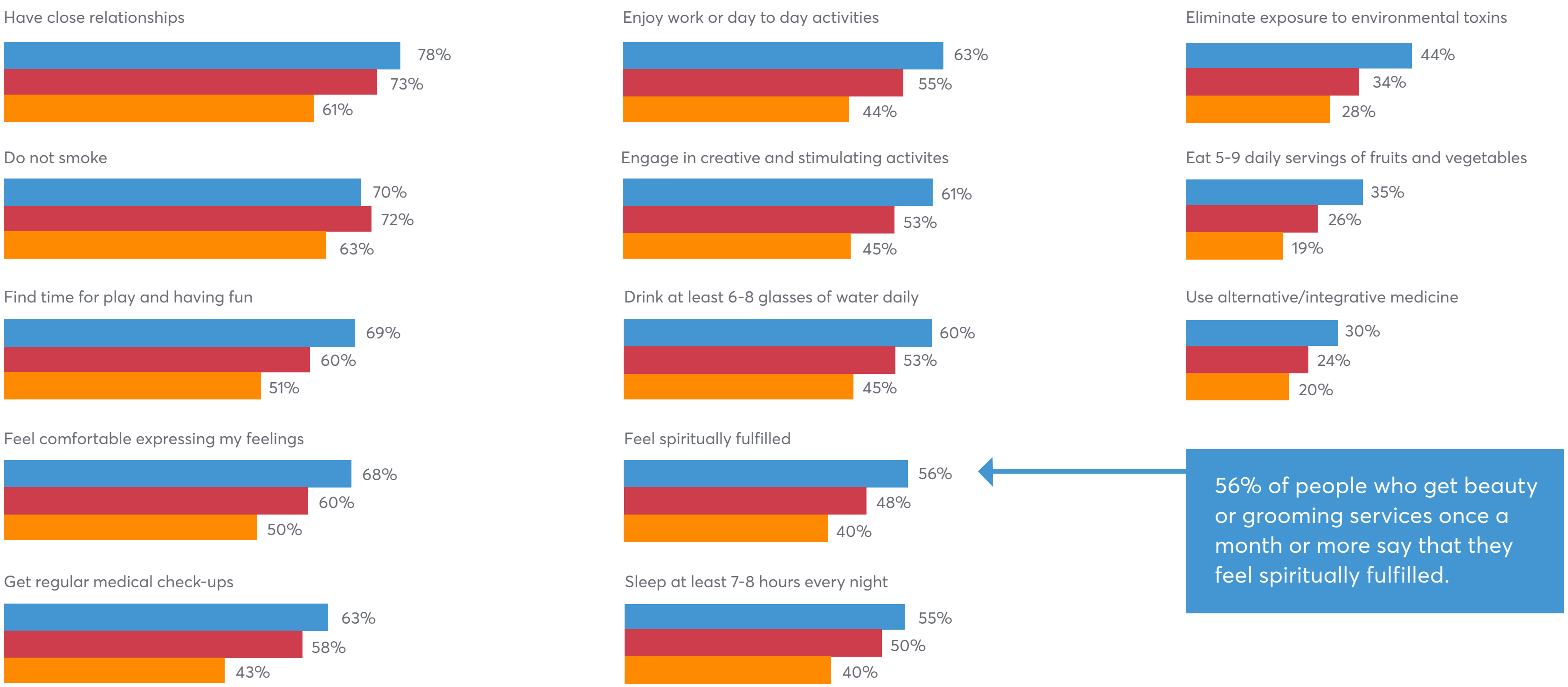
Considering the correlation with household income and getting services, this may suggest that that finances factor into one's overall wellness.

Figure 3.21

Frequency of beauty and grooming services and general health and wellness behaviors

- Get beauty and grooming services once a month or more
- Get beauty and grooming services 3-6 times a year
- Get beauty and grooming services less than once a year or never

(Percent who strongly agree with statement)



The future of beauty and grooming: express services

Thirty-seven percent of those surveyed cite time as a top obstacle to leading a healthy lifestyle. As self-care is an important part of a heathy and balanced life, beauty businesses would do well to help accommodate the time-constrained consumer, allowing more consumers the opportunity to engage in their services.

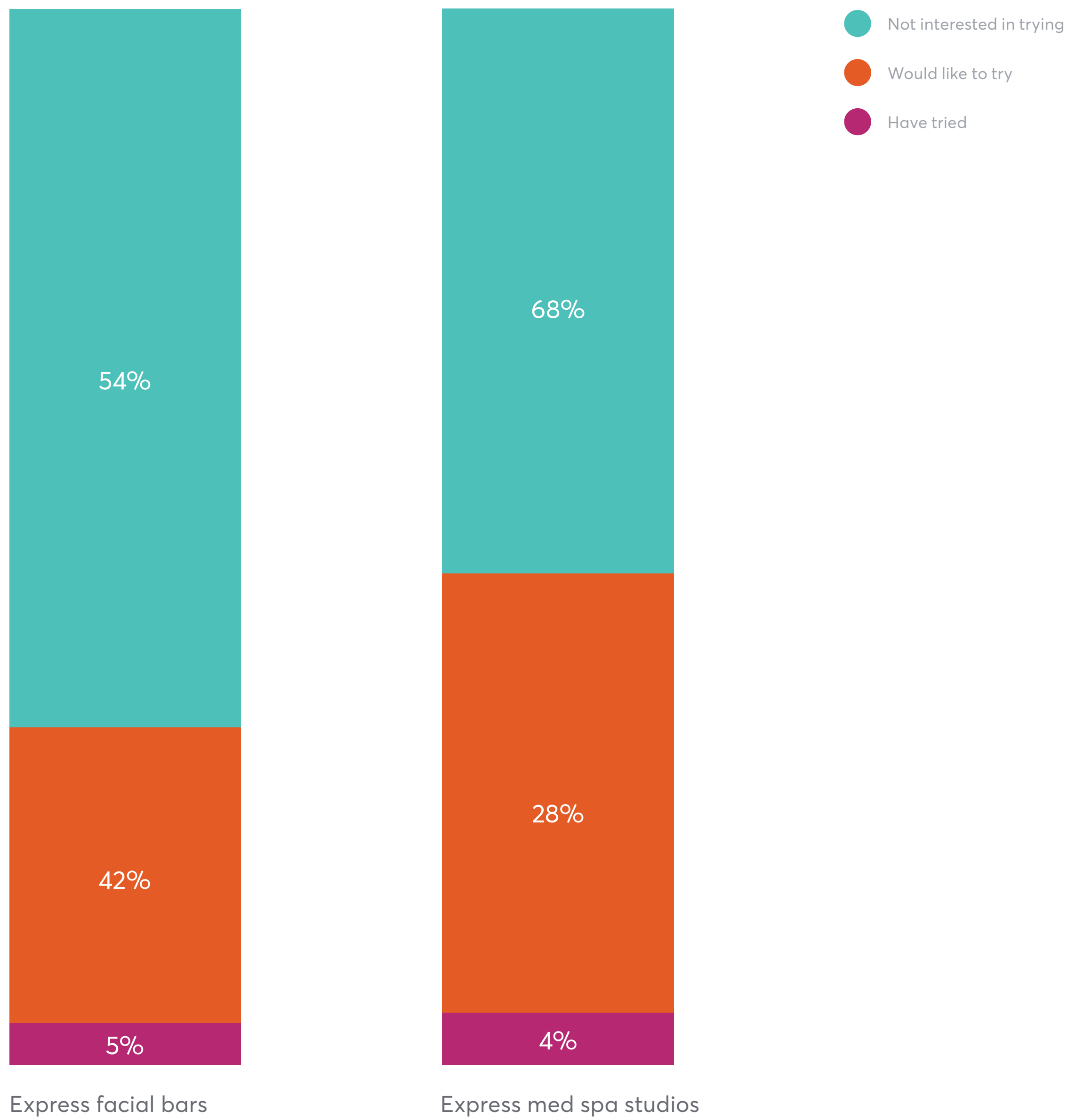
While only 5% of consumers have yet tried an express facial bar, an additional 42% of consumers would like to try it. There is also interest in express med spa studios that provide BOTOX® and similar treatments. Like express facial bars, a minority have been to an express med spa studio (4%), but many more are interested in going in the future (28%).

Express services may be an important part of bringing beauty services to a wider audience.

These speedier versions of services are particularly successful when potential customers seek an affordable and quick way to feel their best before big events.[7] Providers should look to make express services available during the holidays, prom and wedding seasons, and other peak times.

Figure 3.22

Interest in express beauty services



Glossary

Airbrush or Spray Tanning: Spray tanning involves stepping into a booth that sprays the body head to toe with mist. An airbrush tan—typically used interchangeably with spray tanning—usually only requires one session and lasts 7–10 days, and takes less time than a regular tanning session.

BOTOX®: The injection of botulinum toxin that freezes muscles to stop creases and wrinkles caused by facial expressions. Other treatments can include dermal fillers, which use hyaluronic acid and similar substances to "fill in" or plump areas that have lost volume and smoothness.

Eyebrow Waxing or Threading: The removal of eyebrow hair with the application of warm wax, which is then pulled away with a paper strip. Eyebrow threading involves twisting a thread to remove hair directly from the follicles to shape the brow.

Permanent Makeup (or Eyebrow Tinting): A form of tattooing, usually to replace eyeliner, brow tint, or lip liner. Eyebrow tinting uses a vegetable-based, semi-permanent hair dye in order to get a darken, shape, and thicken the brows, and add definition to the face.

Laser Facial Treatments: Laser skin resurfacing that often uses short pulses of carbon dioxide or erbium light energy to reduce wrinkles or other blemishes, such as acne scars, on the face and neck. Treatment removes the damaged cells on skin's surface.

Laser Hair Removal: Hair removal with the use of a concentrated beam of light. Multiple treatments are usually required in order for the hair removal to be effective.

Lash Extensions: The application of synthetic hairs to individual lashes with a bonding adhesive in order to enhance length and fullness. Extensions last as long as the natural lash, and sheds every few weeks.

Mud/Detox Body Wrap: A spa treatment that starts with exfoliating the body to remove dead skin cells, applying oil and ingredients, and tightly wrapping the body in plastic, blankets, or bandages. A detox wrap usually uses mud, clay, or algae to remove toxins.

Natural Hair Services: Natural hair services for textured hair, including relaxing hair, weaves, "twist-outs," "sew-ins," braids, and hair extensions.

Peel/Microdermabrasion: Deep exfoliating treatments. A peel is a chemical exfoliation that uses a mix of acids to dissolve the dead skin cells, which then flake off. Microdermabrasion is a physical exfoliation that gently removes dead skin cells and promotes healthy new cell growth.

Waxing: The removal of body hair with the application of warm wax, which is then pulled away with a paper strip. The amount of time it takes for the hair to grow back depends on the person.

About MINDBODY

MINDBODY, Inc. is the leading technology platform for the fitness, wellness, and beauty services industries. Local entrepreneurs worldwide use MINDBODY's integrated software and payments platform to build, market, and successfully run their businesses. Consumers also leverage MINDBODY to more easily find and engage with providers in their local communities. MINDBODY is committed to helping people lead healthier, happier lives by connecting the world to fitness, beauty, and wellness.

About the MINDBODY research team

The MINDBODY Research & Insights team is a diverse and experienced group of market and user researchers, with deep expertise in advanced quantitative methods, qualitative, and mixed research methodologies. The team brings together PhDs, MBAs, economists, behavioral and social scientists, and international specialists. With broad skills in both consumer and business research and decades of collective industry experience, the team delivers high-impact research in both domestic and international markets to help position MINDBODY as an industry leader.

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