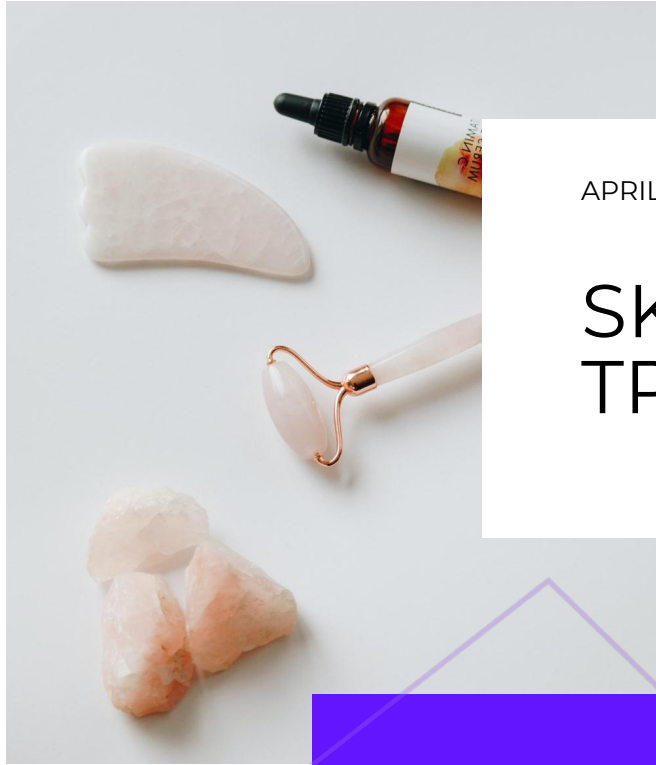


SPATE

APRIL 2021

SKINCARE DEVICE TRENDS



THE AT-HOME SPA IS CREATING NEW HABITS.

The chaos and uncertainty of 2020 had a significant impact on consumers' everyday beauty rituals, as evidenced by decreased search volume for many products and services. Generally speaking, people have been wearing less makeup and paring down on their typical spa routines to align with a new function-oriented, stay-at-home lifestyle.

A bright spot in this bleak beauty landscape, however, has been skincare accessories and devices. Many of these products have experienced strong growth during 2020 and early 2021, as consumers continue to adapt and explore salon-like services at home. Skincare devices like those shared herein allow users to test out their favorite treatments in a cost-efficient and convenient way. Consumers are embracing new routines and habits that are creating space for new brand moments.

As consumers begin to embrace normalcy again — what does this mean for the device category? This report reviews the top trending devices and the implications for brands, as consumers go from DIY back to the spa.

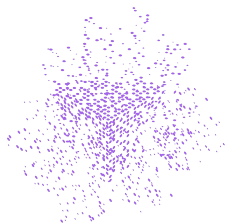
Have questions? Sign up for a [free custom report](#) to get your questions answered.

Thank you,

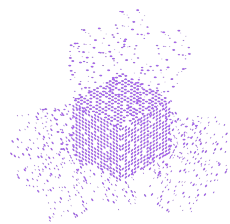
Olivier and Yarden, co-founders of Spate

METHODOLOGY

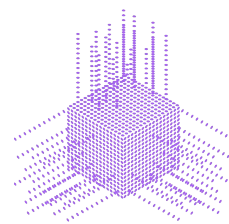
At Spate, we analyze over 20 billion search signals to identify which beauty products are most top of mind for consumers. **Why search data?** Every time a user types a query into the search bar, they are sharing what is top of mind for them — often including concerns, questions, and context they might not share elsewhere. Spate captures billions of queries that project an unbiased lens on *real* consumer behaviors and needs.



+20B beauty related
search signals in the US



Unsupervised machine
learning to identify clusters



Trends classification for
insights and implications

TOP SKINCARE DEVICE TRENDS

TOP TRENDS BY INCREASE IN SEARCH VOLUME

Trend	Avg. Monthly Search Volume	Increase in Avg. Monthly Searches ↓	YoY Growth
skincare fridge	96.5K	+42.9K	+79.9%
facial steamer	89.6K	+39.2K	+77.8%
facial roller	162.9K	+25.2K	+18.3%
pimple patch	64.9K	+19.6K	+43.4%
gua sha stone	43.4K	+17.8K	+69.2%
hydrocolloid patches	17.1K	+10.8K	+172.3%
facial cleansing brush	99.0K	+5.9K	+6.3%
face scrubber	13.9K	+5.6K	+67.2%
ice roller	7.0K	+3.2K	+86.4%
silicone face brush	8.4K	+3.0K	+54.8%

TOP TRENDS BY YEAR-ON-YEAR GROWTH

Trend	Avg. Monthly Search Volume	Increase in Avg. Monthly Searches	YoY Growth ↓
microfiber face cloth	1.7K	+1.2K	+223.4%
hydrocolloid patches	17.1K	+10.8K	+172.3%
silicone face scrubber	6.0K	+2.9K	+96.9%
facial lifting tool	790	+368	+87.0%
ice roller	7.0K	+3.2K	+86.4%
skincare fridge	96.5K	+42.9K	+79.9%
facial steamer	89.6K	+39.2K	+77.8%
facial wand	1.5K	+643	+76.9%
cooling globes	5.8K	+2.4K	+70.5%
gua sha stone	43.4K	+17.8K	+69.2%

Source: Google Search data, year-over-year growth comparing the past 12 months ending February 2021 vs the 12 months prior (US).



WHAT DO THESE DEVICE TRENDS MEAN FOR BRANDS?

As consumer demand shifts to devices, brands are seeking out ways to answer these needs.

“We’ve received an increase in clients requesting not only facial devices, but dual material, multi-functional massage devices for the face and the body. In the effort to reduce cotton ball waste, brands are seeking more eco-friendly options to remove and apply product.

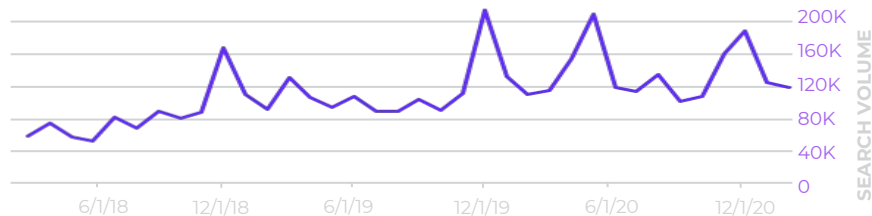
Because of the competitive beauty tool space, brands can differentiate their offering with a plethora of customizable options. From custom colors, materials, stitching, and shapes, the options are endless and better for our planet.”

Cassandra Boler
Director of Marketing, cosmopak



INGREDIENT SPOTLIGHT

FACIAL ROLLER



STATS:

+18.3%

YEAR-OVER-YEAR
GROWTH

RELATED SEARCHES:

Treatments	Search Volume (Average monthly)
microneedling	1.7K
acupuncture	590
detox	300
tightening	100

Concerns	Search Volume (Average monthly)
dark circles	420
loose skin	260
damaged skin	170
wrinkles	160
cellulite	70

SPATE POV

The facial roller is a high volume beauty trend that has experienced strong growth over the past few years. Normally, consumer interest for facial rollers spikes during the holidays, but in 2020 searches also spiked in May after a few months in lockdown. Though competition is high, various concerns within this search category, from wrinkles to cellulite, indicate that there is plenty of room to play. Use these areas of concern, and the overall popularity of at-home treatments, to boost opportunities for existing and new devices in your range. Align your products with a device and a specific concern to resonate with consumers.

Brands	Search Volume (Average monthly)
Nurse Jamie	2.5K
Garnier	2.2K
Jillian Dempsey	1.6K
Rodan and Fields	1.4K
Skin Gym	1.3K

HOW BIG IS THIS TREND

High Volume
161.7K average monthly searches

HOW COMPETITIVE IS THE SPACE?

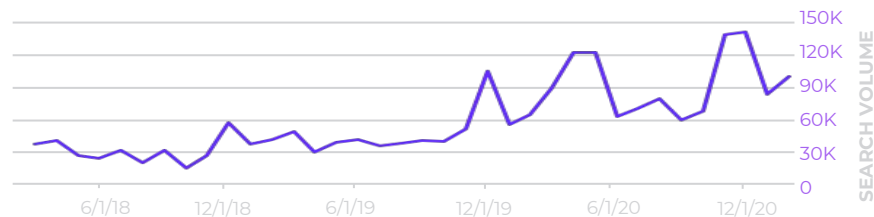
Very High Competition
15.2K average brand searches

WHO OWNS THE MARKET SHARE?

Several Market Leaders
9 market leaders

INGREDIENT SPOTLIGHT

FACIAL STEAMER



STATS:

+77.8%

YEAR-OVER-YEAR
GROWTH

Photo source:
@orangejulius7

HOW BIG IS THIS TREND

High Volume
89.6K average monthly searches

HOW COMPETITIVE IS THE SPACE?

High Competition
12.6K average brand searches

WHO OWNS THE MARKET SHARE?

Several Market Leaders
1 market leaders

RELATED SEARCHES:

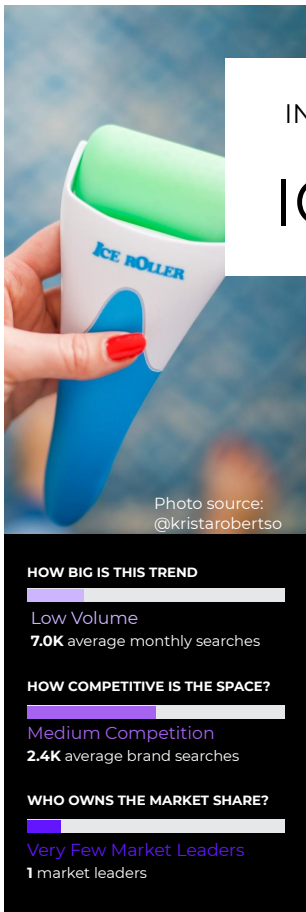
Benefits	Search Volume (Average monthly)	Product Format	Search Volume (Average monthly)
professional	1.7K	scrub	390
portable	880	mini	390
fresh	70	large	370
hydrating	70	mist	70

SPATE POV

Facial steamers have been on the rise since 2018 and likely won't be slowing down any time soon. After seeing a spike in search volume at the beginning of lockdown, this skincare device was also top of mind for consumers during the holiday season. Nanosteamer is a consumer favorite when it comes to facial steamers, but search interest for "best" and "review" show that consumers are still exploring their options before purchasing. Consider how your facial steamer can stand out by offering a variety of size options. As well, explore options for promoting complementary products alongside the facial steaming experience.

Purchases	Search Volume (Average monthly)
best	5.4K
price	70
review	70

Brands	Search Volume (Average monthly)
Nanosteamer	12.3K
Dr Dennis Gross	250



INGREDIENT SPOTLIGHT

ICE ROLLER

STATS:

+86.4%

YEAR-OVER-YEAR
GROWTH

HOW BIG IS THIS TREND

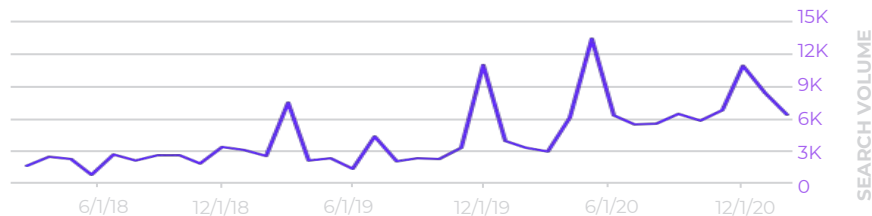
Low Volume
7.0K average monthly searches

HOW COMPETITIVE IS THE SPACE?

Medium Competition
2.4K average brand searches

WHO OWNS THE MARKET SHARE?

Very Few Market Leaders
1 market leaders



RELATED SEARCHES:

Benefits	Search Volume (Average monthly)	Purchases	Search Volume (Average monthly)
relief	70	best	170
puffiness	70	review	20
professional	40		
		Brands	Search Volume (Average monthly)
		Zoe Ayla	2.4K

SPATE POV

Cold therapy tools like the ice roller provide anti-inflammatory benefits, and leave the user with a temporarily calm and less puffy complexion. Though the ice roller sees much lower search volume than other facial roller variations, it still follows similar search patterns — a spike in May after a few months of lockdown, followed by a seasonal holiday spike. Based on related searches, or lack thereof, the consumer is still in the early awareness and education phases of this product trend. If applicable, consider promoting your ice rollers and similar devices alongside trending skin concerns, from sensitivity to maskne to sunken, tired eyes. Explore how your product can be ergonomically ideal to limit hand cramping and boost comfortability.



WHAT DO THESE TRENDS MEAN FOR THE CONSUMER EXPERIENCE?

As consumers integrate new devices into their routines, they're still learning how to properly do so. Jillian Wright provides perspective on the impact that devices can have without using complementary products to infuse the skin. Consider how your products can fit into new routines and help consumers get the most out of their devices.

“There’s a lot of miscommunication, especially with social media. If someone uses ice, it will bring down the puffiness and swelling and it will feel good, but people need to be thinking about how they’re going to infuse their skin. Otherwise, it’s like walking out of the shower without putting any lotion or oil on your body. With that, your skin becomes flaky and dry. The same thing is going to happen with your face.”

Jillian Wright
Master Aesthetician & Co-Founder of Indie Beauty Expo



HOW CAN BRANDS WIN IN THIS SPACE?

Using Spate data, Winky Lux identified the rise of facial rollers in skin care. This new consumer trend inspired the brand to innovate on an eye cream applicator as part of their Wakey Wakey brightening and depuffing eye cream launch.

"We know the skincare category has become increasingly important to consumers, so we looked a bit further into their needs and saw this opportunity for an eye-specific roller. Having bright and de-puffed under eyes resonates with our customer—**so much so that for every two eye creams sold, they are buying one applicator.**"

Natalie Mackey
Co-Founder & CEO of Winky Lux



WHAT'S NEXT?

As the consumer begins to spend less time at home, how can devices become a convenient part of the everyday skincare routine beyond lockdown? Consider opportunities to demonstrate value once the consumer embraces the out-of-home spa routine again.

"We're seeing a big shift towards skin health and skin confidence and a trend towards minimalistic skincare routines or 'skinmalism' so multitasking treatment devices like the UFO 2 are flying.

[This device] has taken sheet-masking to the next level allowing for the skin to absorb 100% of the mask essence or serum so nothing is wasted."

Boris Raspudic
FOREO GM (UK & Ireland)

"Regular masks have to be used for 10+ minutes in order for your skin to absorb all the ingredients (usually acting more like a top coat), but FOREO's UFO 2 firstly prepares the skin making it more receptive and the technology used in the device helps penetrate the skin faster and deeper."

Chris Luckham
FOREO Head of Education (UK & Ireland)



SPATE POV

As we passed the one-year pandemic anniversary in the U.S., we spent some time reflecting on how this year has shifted our relationship with beauty services. It's safe to say that at this point, many of us now have experience trimming our bangs, painting our toenails, or waxing our mustache. While some of these experiences may have been DIY wins, it's also safe to say that there are certain professional services that consumers will embracing soon again.

As vaccine distribution ramps up and restrictions loosen, ensure your at-home devices and accessories don't become a relic of the pandemic. Focus on [the time and money that consumers will save](#) by doing their own treatments at home.

[Align your products with popular devices, and align your devices with everyday products.](#) As consumer habits continue to evolve, and consumers decide which devices they'll continue to use over the next year — align your creams, serums, and oils with device routines that are here to stay. If your brand carries devices, position your devices as applicators so that they're used alongside everyday serums and creams even when the consumer has less time to treat themselves to an at-home facial massage.

[Don't miss the opportunity to innovate](#) through functional features (i.e., a hot or cold temperature setting) and sustainability(!!!). Explore different functions that can enable higher quality or faster absorption for skin care products. Explore how your device can act as a replacement to disposable applicators, and consider sustainable materials (ie stainless steel vs jade). As the makeup category begins to show signs of a comeback, consider how devices can be used for makeup removal, as well.

[Plan ahead.](#) While life is going to be different by the end of the year, beauty devices will still be on consumers' wish lists this holiday season. Explore opportunities to package your products as the perfect gift set for IRL holiday gatherings, and consider limited edition aesthetics for holiday launches.

SPATE: MACHINE INTELLIGENCE FOR THE BEAUTY INDUSTRY.

What's The Next Big Trend?

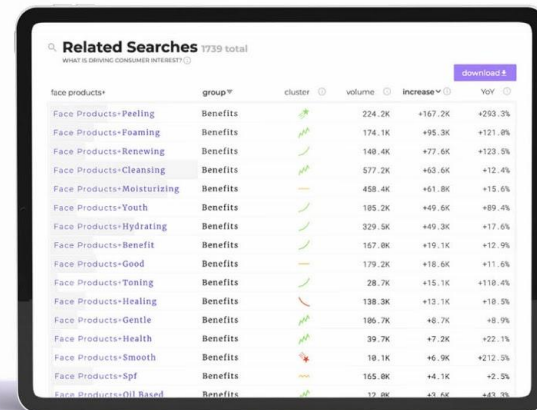
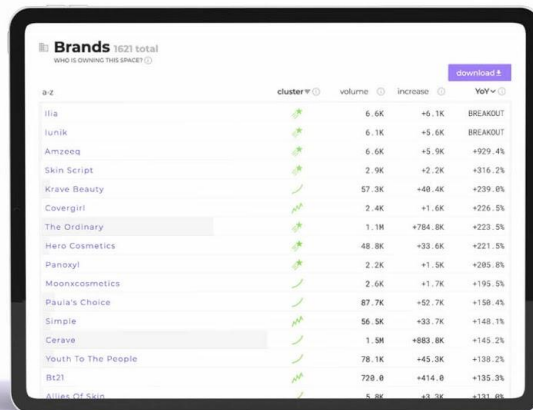
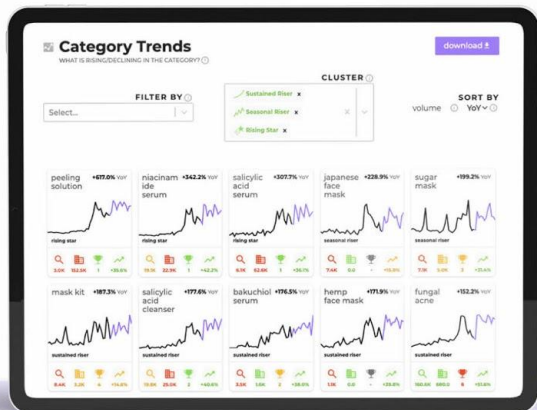
20+ billion signals in beauty and wellness to spot and predict which trends are here to stay.

Which brands are owning the space?

Measure level of competition within a space. Compare consumer interest across brands, including DTC.

How To Position A Product?

Contextual data to identify consumer needs (claims, concerns, ingredients) for messaging.



Over 20BN search signals to
spot the next big trend.
Request your free report today.

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