

Consumer Preferences in Aesthetic Enhancements: A Comprehensive Market Analysis of Europe

BY

Mihir Vijay Bhagat A003

Veer Nailesh Shah A020

Diya Singh Rawat A018



**NILKAMAL SCHOOL OF MATHEMATICS,
APPLIED STATISTICS & ANALYTICS**

**NMIMS NSOMASA
Ground Floor, SBMP Phase I,
Irla, N. R. G Marg, Opposite Cooper Hospital,
Vile-Parle (West), Mumbai – 400 056**

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1. Objectives

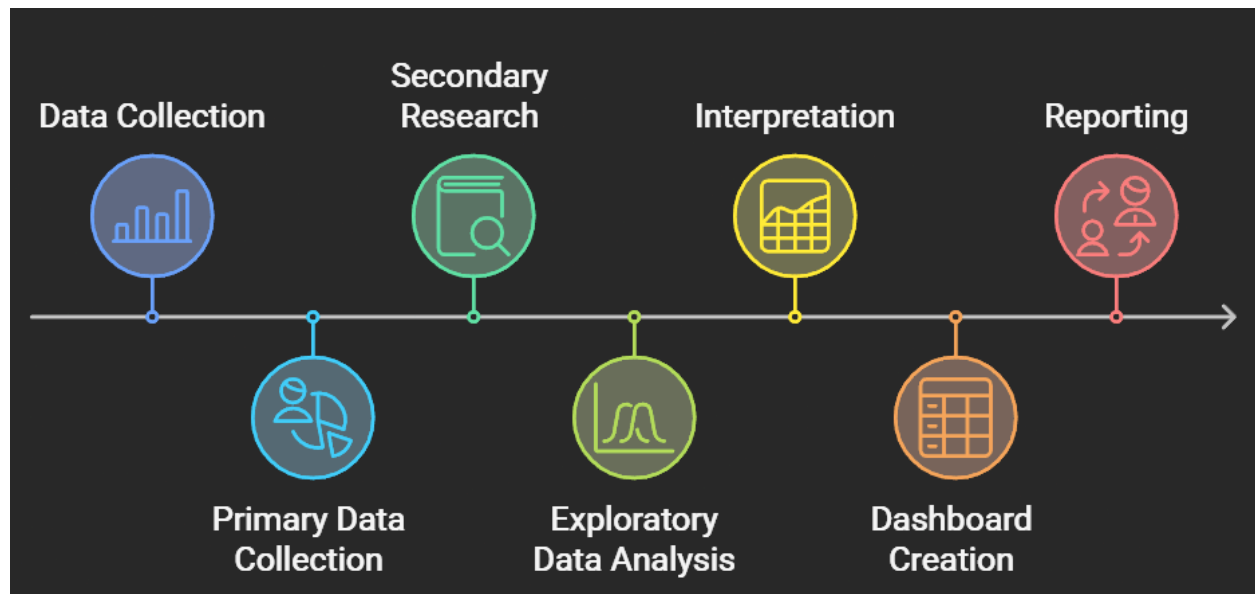
- 1. To Analyze Market Potential:** Identify and evaluate geographic regions within the UK and Europe with significant potential for cosmetic product adoption, based on customer behavior, the aesthetics industry's growth, and consumer demand.
- 2. To Identify Popular Cosmetic Treatments and Focus Areas:** Provide insights into the most sought-after aesthetic treatments and their related body areas to inform the development of products aligned with market demand.
- 3. To Define the Target Demographic:** Analyze age groups and their preferences to determine the primary customer segment for the initial product launch, ensuring relevance and alignment with marketing efforts.
- 4. To Deliver Regional and Demographic Insights:** Present a detailed analysis of prioritized regions, growth opportunities, and consumer trends that support the client's strategic expansion into the cosmetic product market.
- 5. To Develop Actionable Product Recommendations:** Suggest a tailored product portfolio that complements popular aesthetic treatments and fills market gaps for cosmetic product opportunities.
- 6. To Provide Strategic Guidance for Market Entry:** Offer clear recommendations on marketing strategies, branding approaches, and distribution channels to effectively target and engage the identified customer base in the prioritized regions.

2. Introduction

The aesthetics and cosmetic product market is rapidly evolving, presenting a significant opportunity for diversification and growth. As of 2025, the European aesthetics market is projected to expand from approximately USD 6.81 billion in 2024 to USD 16.83 billion by 2032, reflecting a compound annual growth rate (CAGR) of 12.0%. This growth is driven by increasing consumer demand for non-surgical procedures, advancements in technology, and a heightened focus on personal care and wellness.

In the UK, the aesthetics market is currently valued at around £3 billion, with expectations to reach £3.6 billion by 2025. This expansion is fueled by several factors, including an aging population seeking anti-aging treatments and a growing acceptance of cosmetic enhancements. Notably, approximately 7.7 million people in the UK have undergone cosmetic procedures in the past year, representing about 11% of the population. The broader European cosmetics market is also experiencing robust growth, with retail sales projected to reach approximately €96 billion (around USD 105 billion) by 2025. The medical aesthetics segment alone is anticipated to grow to USD 13.4 billion by 2030, with a CAGR of 11.9% from 2023 onwards. As Avdian Management Consulting prepares to assist its client in venturing into the cosmetic product market, this report will provide a comprehensive analysis of target regions within the UK and Europe, popular aesthetic treatments, and ideal demographic profiles for initial product launches.

3. Methodology



1. Data Collection:

a) Primary Data Collection:

- Utilized postcode data from Doogal's Postcode Downloads, which provides various postcode datasets in CSV format, including detailed demographic information related to customer and business postcodes 1.
- Performed a left join operation on customer postcode and business postcode to extract relevant demographic details and behaviors.

b) Secondary Research:

- Conducted research on the aesthetic cosmetic market of Europe using industry reports available online, ensuring to gather credible sources with links for reference.

2. Exploratory Data Analysis (EDA):

- Employed the Pandas Profiling package for comprehensive data visualization.
- Identified missing values, extracted patterns, and performed correlation analysis to understand relationships within the dataset.

3. Interpretation:

- Analyzed the results from the EDA to derive meaningful insights regarding customer behaviors and market trends.

4. Dashboard Creation:

- Developed a dashboard in Tableau to present key insights visually.
- Suggested actionable product recommendations and marketing strategies based on the insights gathered.

5. Reporting:

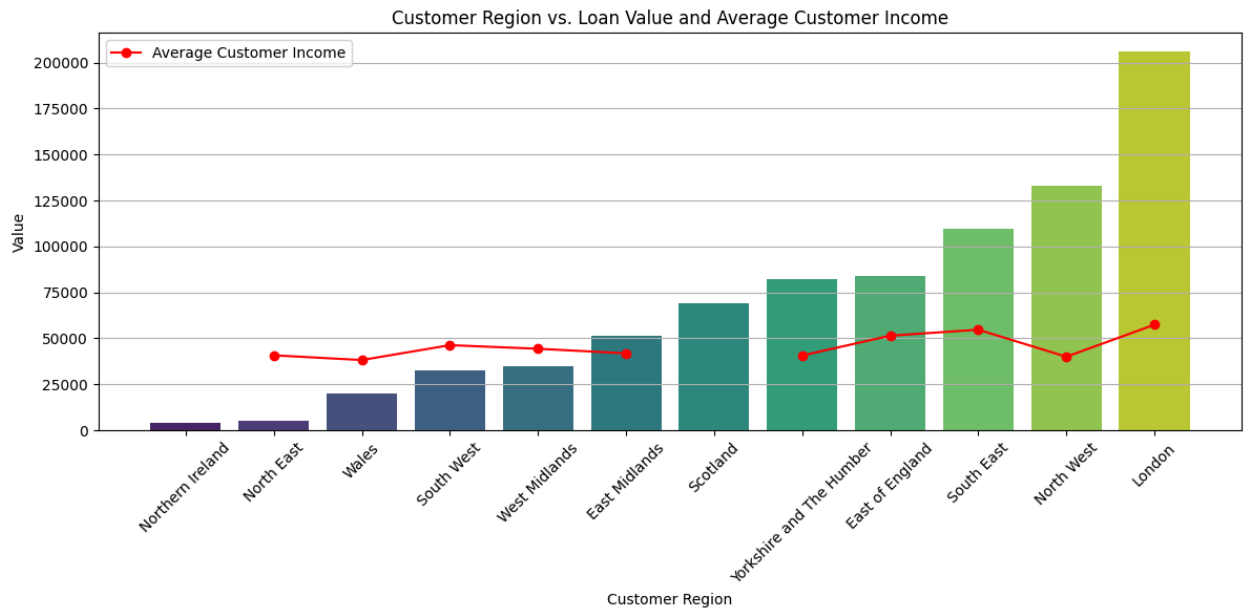
- Compiled a detailed report encompassing the entire analysis process, including tools used, graphs generated, and insights derived from the data.

4. Analysis

Primary Research Analysis

1. Regional Analysis

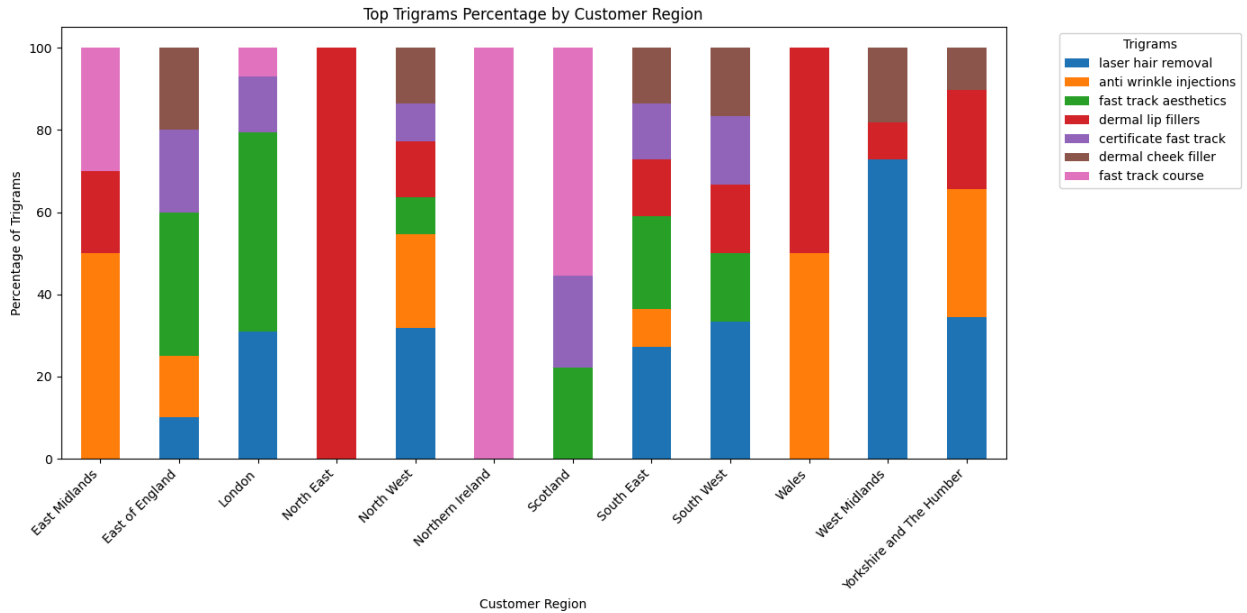
a) Customer region vs Loan Value & Average Customer



The graph compares the average loan value and average customer income (red line) across different customer regions. The height of the bars shows that London has the highest average loan value, while regions like Northern Ireland and North East have the lowest. The red line indicates that average customer income is relatively steady across most regions, with a slight dip in some areas but a peak in London.

Note: The regions have been extracted from the customer postal code column from additional dataset.

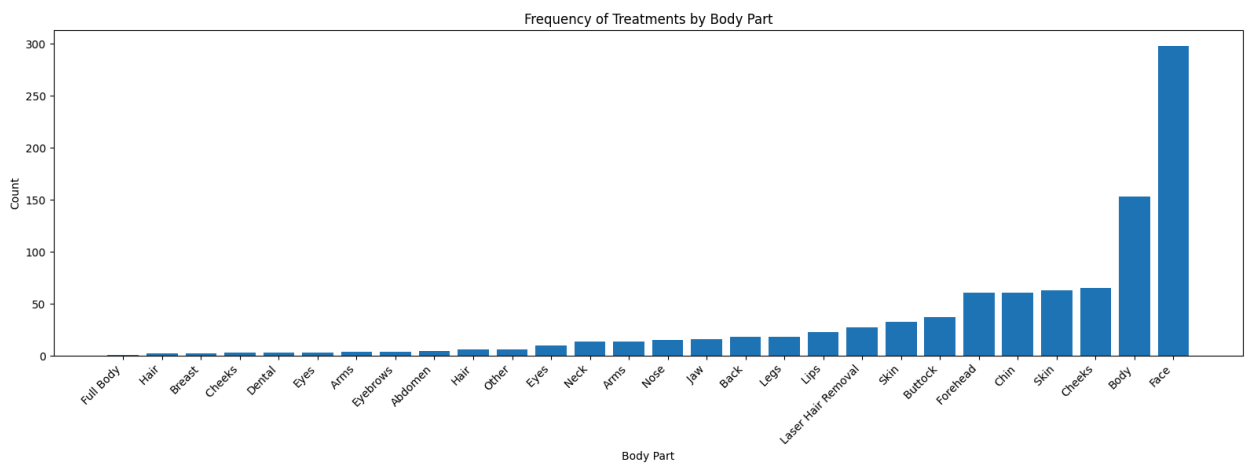
b) Top Treatment Trigrams Percentage by Customer Region



The most prominent treatments vary across regions in the UK, with "Laser hair removal" in the East of England, London, South East, Wales, West Midlands and Yorkshire. "Dermal lip fillers" dominate the North East and North West, while "Fast track aesthetics" is the top treatment in Northern Ireland, Scotland and East Midlands. "Anti-wrinkle Injections" are famous in East of England and London. This highlights regional preferences, with "Laser hair removal" being the most widespread, while other treatments like "Dermal lip fillers", "Fast track aesthetics" and "Anti-wrinkle injections" show localized dominance in specific regions.

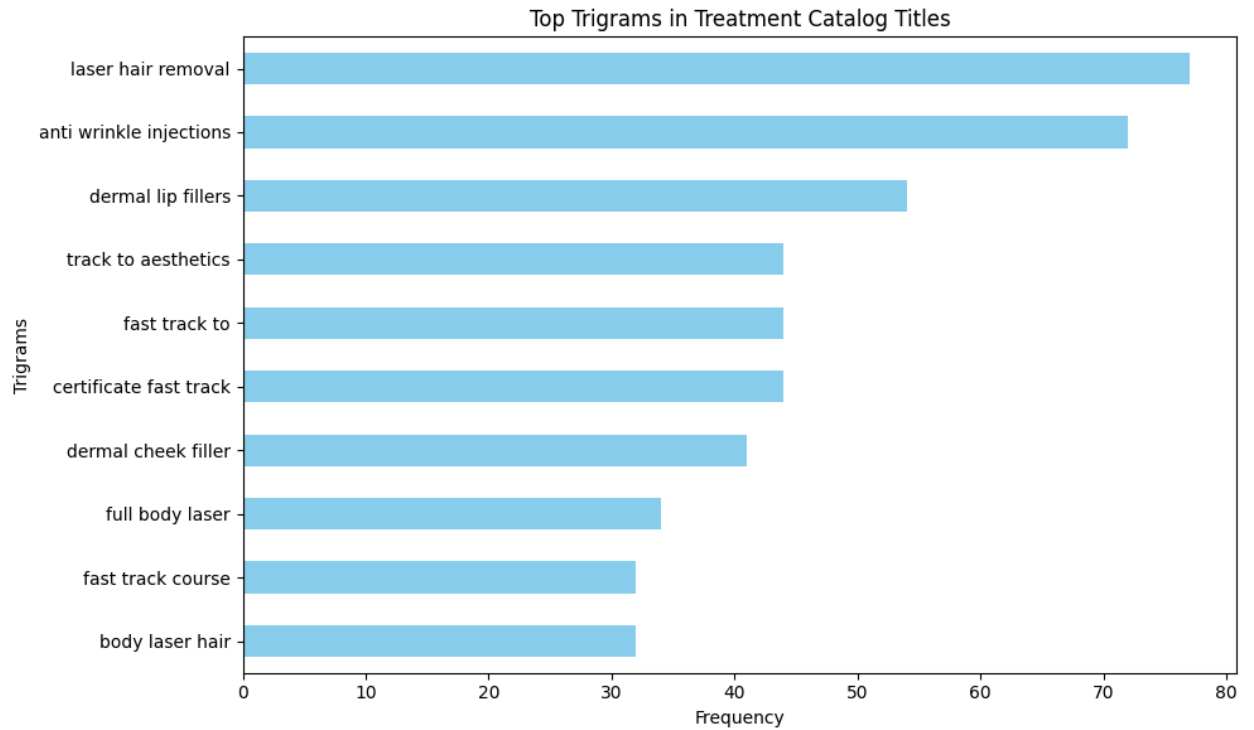
2. Treatment & Body Area Analysis

a) Frequency of Treatment by Body Parts



The face has the highest number of treatments, with a frequency of 298, followed by the body at 153. Cheeks, skin, forehead, and chin follow closely with frequencies of 65, 63, and 61, respectively.

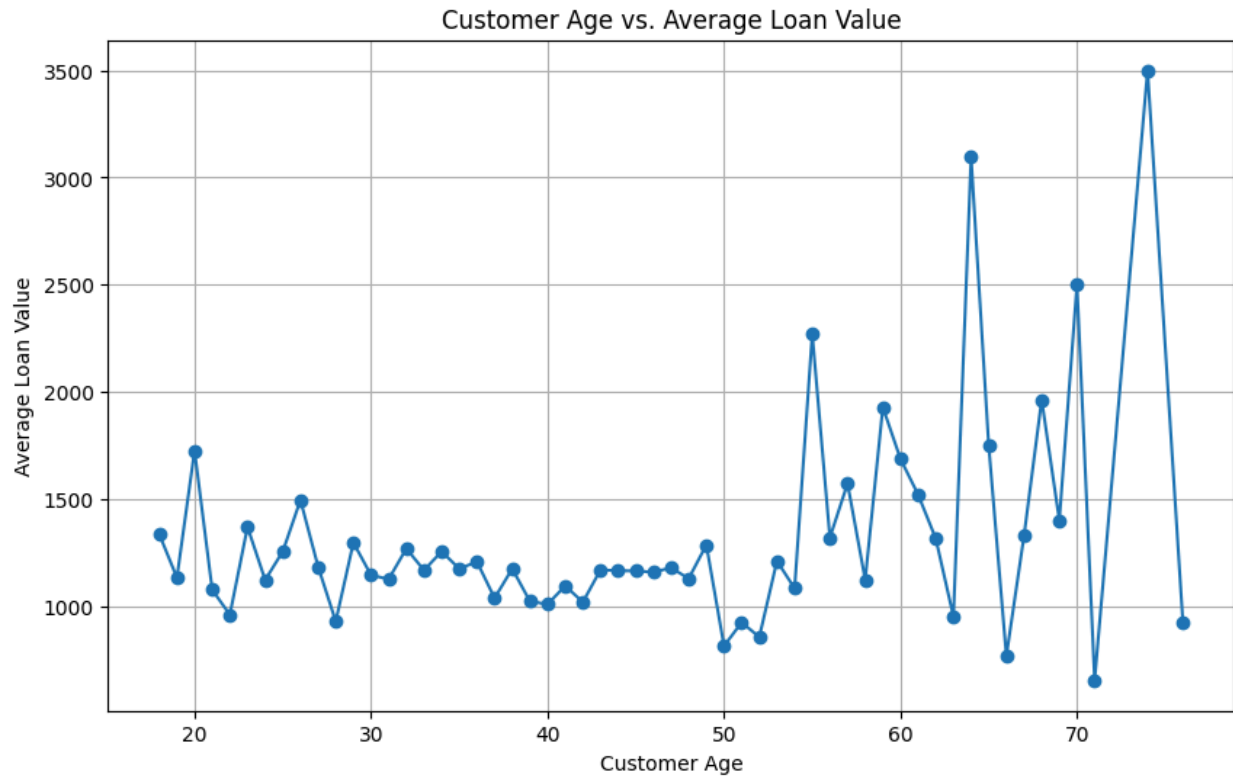
c) Top Treatment Trigrams Catalog Titles



This bar chart displays the most frequent trigrams (three-word combinations) found in treatment catalog titles. The trigram **"laser hair removal"** of 77 is the most common, followed by **"anti wrinkle injections"** with 72 and **"dermal lip fillers"** with frequency of 54.

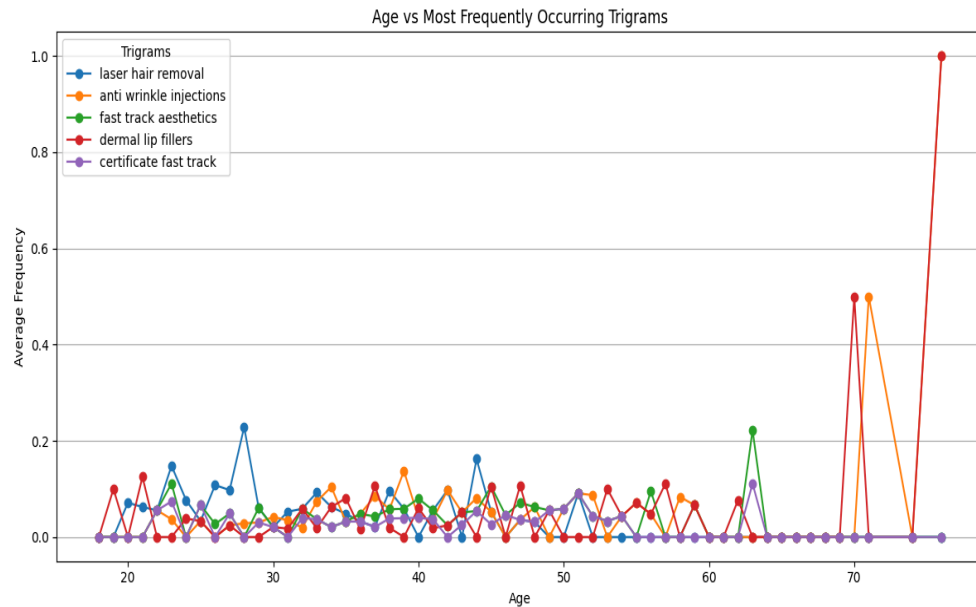
3. Demographic Analysis:

a) Average loan value by age group



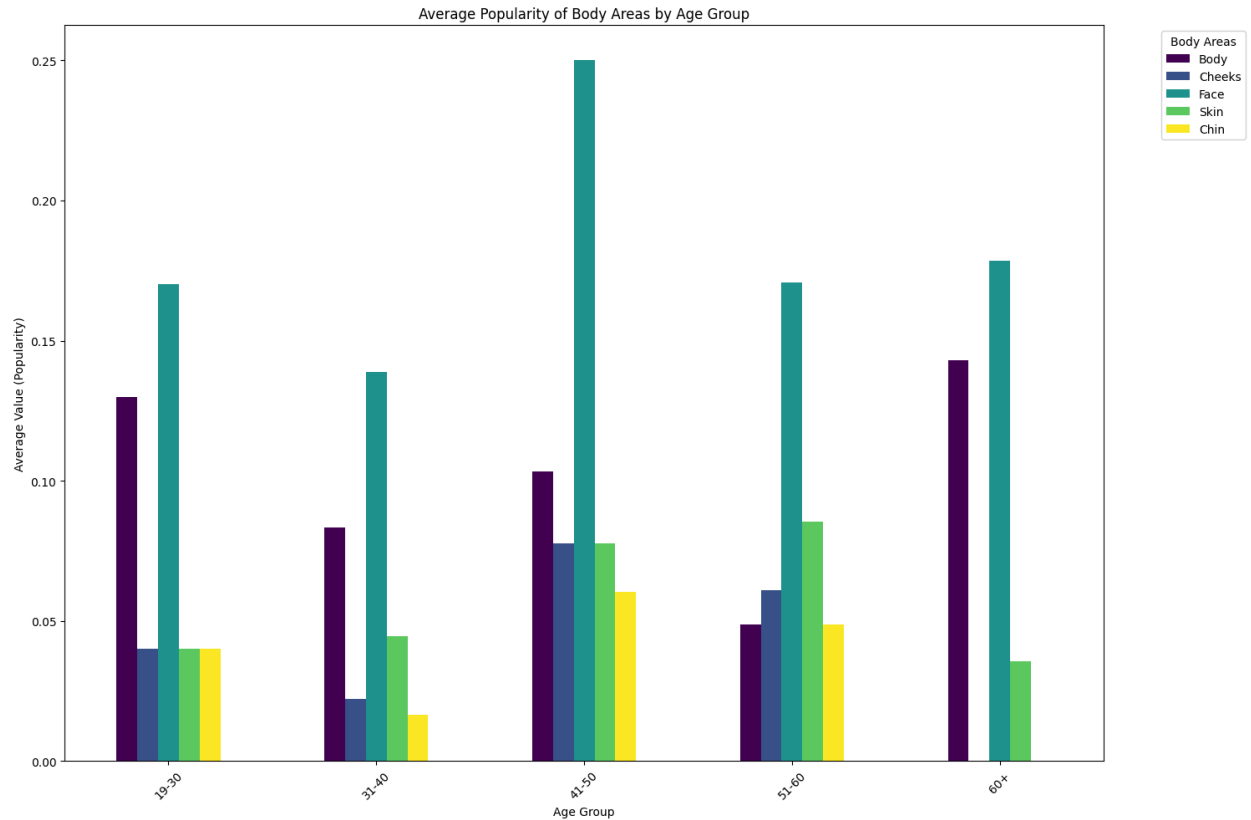
This graph reveals age groups demonstrating stronger intention of spending for cosmetic surgeries. For younger customers (ages 20-40), average loan values remain relatively stable, mostly ranging between 1000 pounds and 1500 Pounds . As customers age, particularly beyond 50, there is increased volatility, with sharp peaks and dips, and some customers over 60 showing significantly higher average loan values.

b) Grouping data by treatment type



The graph shows shifting interests across age groups in aesthetics and certifications. Individuals aged 20–30 focus on treatments like **laser hair removal** and **anti-wrinkle injections** for appearance enhancement and aging prevention. By 30–40, interest remains steady in **lip fillers** and wrinkle treatments to maintain a youthful look, increasing further in the 40–50 age group. Interest in **fast-track cosmetic procedure** courses grows from ages 50–60, increases notably from 60–70, and peaks at 70+, highlighting a rising focus on aesthetics and quick cosmetic solutions among older individuals.

c) Grouping data by body area



The bar chart titled "Average Popularity of Body Areas by Age Group" provides insights into how preferences for various body areas differ across age groups. The Face is consistently the most popular body area, especially peaking in the 19-30 age range, suggesting a strong focus on facial features among younger individuals. As people age, the importance of Skin increases notably, reaching its highest popularity in the 31-60 age range, indicating a heightened attention to skincare and anti-aging routines during these years. The Body and Cheeks maintain a lower, yet steady popularity across all age groups, while the Chin is consistently the least favored body area. These trends highlight the evolving beauty and self-care priorities, with younger individuals prioritizing facial aesthetics and older age groups emphasizing skincare.

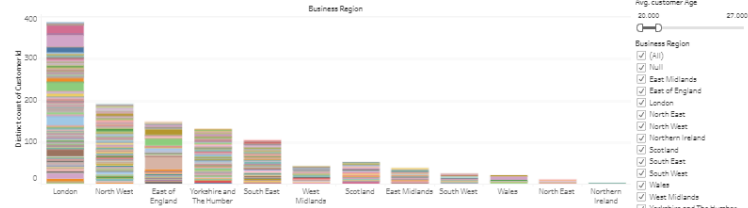
DASHBOARD

Comprehensive Aesthetic Cosmetic Market Analysis of UK

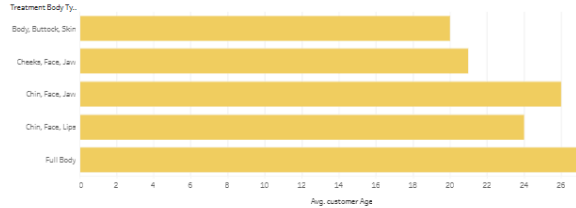
Regional Analysis: Total Loan value and Average Income of Customers



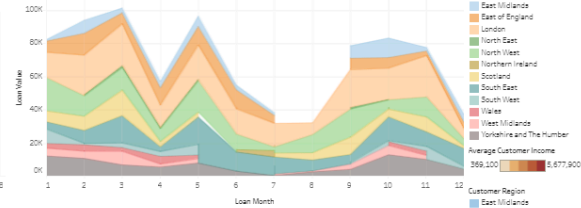
Popularity Analysis: Business Region Vs Treatment Catalog Types



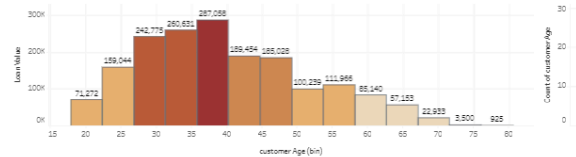
Average Age Vs Treatment Body Part



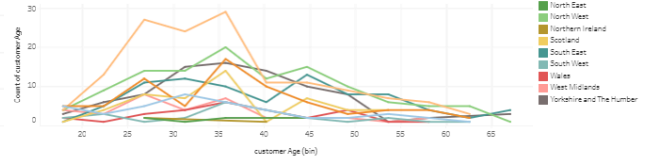
Monthly Loan Value Trend by Customer Region



Customer Age vs Total Loan Value and Average Customer Income



Distribution of Customer Age and Region



Link

https://public.tableau.com/views/marketresearch_17366006681840/Dashboard1?language=en-US&publish=yes&:sid=&:redirect=auth&:display_count=n&:origin=viz_share_link

Secondary Research Analysis

Consumer behaviour & preferences among different age groups with corresponding influencing factors in Europe

Sr No.	Age Group	Consideration Rate	Popular Procedures	Influences
1	18-24 Years	36%	Lip enhancements, fillers, rhinoplasty, breast augmentation, Buttock Surgery	Influenced heavily by social media (45%), peer pressure, and celebrity culture. Tweets often highlight beauty standards.
2	25-34 Years	32%	Hairline surgery, Botox, lip fillers	Social media influence (30%) and trends set by

				influencers are significant. Hashtags like #Botox and #LipFillers are common.
3	35-44 Years	24%	Facelifts, eyelid surgeries, anti-aging treatments	Peer influence (34%) and personal aspirations for youthfulness drive interest. Tweets often discuss aging concerns.
4	45-54 Years	11%	Eye socket surgeries, facelifts	Motivated by injury repair (39%) and societal expectations regarding appearance. Conversations on Twitter often focus on recovery experiences.
5	55-64 Years	11%	Eyelid surgery, skin rejuvenation	Past bullying experiences (22%) and desire for self-esteem improvements influence decisions. Discussions on social media reflect these sentiments.
6	65+ Years	14%	Eye socket surgeries, skin tightening	Driven by injury repair motivations (44%) and the desire to maintain appearance in later life. Tweets often express concerns about aging gracefully.

- Younger individuals (18-34) are particularly influenced by social media platforms where beauty standards are amplified through hashtags like #CosmeticSurgery and #BeautyGoals.
- Older demographics tend to focus more on corrective procedures motivated by personal experiences such as injuries or societal pressures related to aging.

Note: These trends have been extracted from the internet market study reports and verified accordingly.

6. Results

Strategic Recommendations

1. Product Portfolio

a) Synergy with Aesthetic Treatments

1. **Laser Hair Removal:** Introduce a pre-treatment exfoliation scrub to prepare the skin and a post-treatment soothing gel with aloe vera and chamomile to reduce redness and irritation.
2. **Dermal Fillers:** Develop hyaluronic acid-based hydrating serums and moisturizers to enhance filler longevity and skin elasticity.
3. **Anti-Wrinkle Injections:** Offer collagen-boosting creams and peptides-infused serums to support skin recovery and maintain results.
4. **Breast Augmentation:** Create specialized scar care creams with silicone and vitamin E to minimize scarring, along with firming body oils and stretch mark prevention lotions featuring shea butter and rosehip oil.
5. **Buttock Surgery:** Introduce post-surgery recovery products like nourishing creams with arnica to reduce bruising, hydrating gels for skin elasticity, and exfoliating scrubs with sugar and coconut oil for long-term skin maintenance.
6. **Fast Track Aesthetic Courses:** Create professional-grade skincare products tailored for use during quick courses, such as gentle cleansers and non-irritating creams, serums, body oil etc.

b) Customization

1. Offer "**Treatment Care Kits**" specific to each procedure (e.g., "Laser Hair Removal Kit" with pre/post-care products and sunscreen, "BBL Recovery Kit": Cooling gels, firming creams, and post-treatment instructions for body contouring customers. "Filler-Friendly Hydration Pack": Hyaluronic acid-infused moisturizers and night masks for dermal filler customers.
2. Create "**Age-specific kits**", such as anti-aging solutions for 40+ customers and acne-prevention skincare for younger audiences.

c) Innovation

1. Introduce cutting-edge products like enzyme-based exfoliators for laser-treated skin and post-treatment cooling masks infused with green tea and ceramides. Incorporate “**customized organic Ayurveda solutions**” using natural, minimally processed ingredients to meet the demand for gentle, chemical-free skincare in pre and post-treatment care.
2. Develop a “**sustainable nutri-cosmetics**” line with refillable packaging and vegan formulations, featuring trendy ingredients like collagen peptides, hyaluronic acid, probiotics, vitamins C and E, spirulina, algae extracts, and adaptogens to attract eco-conscious consumers.

2. Marketing Strategy

a) Target Age groups

Ages 20–30: Highlight products for appearance enhancement (e.g., laser hair removal kits, anti-acne creams) and promote them on Instagram and TikTok with aesthetic influencers.

Ages 30–40: Emphasize wrinkle-prevention and skin rejuvenation products like retinol serums or anti-wrinkle boosters. Use TikTok, Instagram, LinkedIn and Facebook ads targeting professionals.

Ages 50–60: Focus on anti-aging and hydration products, such as collagen creams and restorative products.

b) Geographic customization

1. **London, South East, West Midlands, North West:** Promote laser hair removal products, supported by ads highlighting long-term cost savings and smooth skin.
2. **North East, Wales, Yorkshire, East of England:** Focus on dermal fillers and lip enhancement kits, highlighting the trend of fuller lips among younger demographics.
3. **London, Scotland, Northern Ireland, East of England:** Market fast-track aesthetics courses and related professional-use products, leveraging partnerships with local clinics.
4. **London, South East:** Specialized scar care creams for breast augmentation with silicone and vitamin E to minimize scarring. Firming body oils and stretch mark prevention lotions featuring shea butter and rosehip oil.
5. **North West, West Midlands:** Buttock surgery products focus on post-surgery recovery, offering arnica creams to reduce bruising, hydrating gels to enhance skin elasticity, and sugar-coconut oil scrubs for long-term skin maintenance.

c) Treatment- specific campaigns

1. Launch campaigns like “**Perfect Your Laser Glow**” for laser hair removal and “**Lip Love Essentials**” for dermal fillers.
2. Conduct before-and-after treatment product trials with testimonials to showcase effectiveness.

d) Influencer Collaboration

1. Partner with micro-influencers specializing in aesthetics (5k-5M followers) for authenticity.
2. Collaborate with dermatologists or aesthetic practitioners to endorse products, enhancing trustworthiness.

3. Distribution Strategy

- a) **Clinic Partnerships** - Partner with clinics offering popular treatments to sell treatment-specific products directly at the point of service. For example, post-treatment skincare sold alongside laser hair removal packages. Provide clinics with co-branded product displays to strengthen brand recognition.
- b) **E-commerce website-** Build an interactive online store with features such as Virtual consultations for personalized product recommendations, Before-and-after galleries and reviews for each product and Subscription services for recurring purchases, such as sunscreens or serums. Offer a dual subscription service where customers get both cosmetic products and access to bundled treatment discounts. Offer regional discounts for high-demand areas like London, North West, South East and East of England.
- c) **Retail expansion-** Stock products in high-end beauty retailers and pharmacies like Boots or Superdrug in urban regions with high cosmetic procedure rates. Run targeted promotions like discounts or free trial kits in regions showing high potential for growth in specific treatments. Position the brand as a premium provider of treatment-aligned skincare, focusing on quality, safety, and efficacy.

7. Conclusion

1. Product Range Recommendations:

- Introduce a range of products aligned with popular aesthetic treatments like laser hair removal, dermal fillers, anti-wrinkle injections, breast augmentation, buttock surgery corresponding with most treated body parts i.e. Face, skin, cheeks, breast and buttocks.
- Develop organics & natural customizable treatment care kits and age-specific skincare solutions to cater to diverse customer needs.
- Innovate with sustainable nutri-cosmetics and cutting-edge products to appeal to eco-conscious consumers.

2. Marketing Strategy:

- Target different age groups with tailored messaging and products: focus on appearance enhancement for ages 20-30, anti-aging for ages 50-60, and professional skincare for ages 30-40.
- Utilize social media platforms like Instagram, TikTok, and LinkedIn, leveraging influencers and aesthetic practitioners for authenticity.
- Implement treatment-specific campaigns and before-and-after testimonials to demonstrate product effectiveness.

3. Distribution Strategy:

- Establish partnerships with clinics offering popular treatments to distribute treatment-specific products directly.
- Build an interactive e-commerce platform with virtual consultations and subscription services.
- Expand retail presence in high-end beauty retailers and pharmacies, focusing on urban areas with high cosmetic procedure rates.

8. References

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