

INSIDE
INDUSTRY

DEVICES EDITION

WHAT SALON OWNERS WANT

How salon and clinic owners across Australia and New Zealand
choose, buy and live with their treatment devices



FOREWORD

Every device brand in this industry has a view on how salon owners buy, and almost none of those views have been tested against what owners actually say when you ask them. This report is our attempt to close that gap.

Rather than asking owners what they would do in theory, we asked each of them to think about the most recent treatment device they brought into their business, whether they bought, leased, financed or rented it, and to walk us through that one purchase from the first moment they thought "we should look into this" to how the machine is performing today. Owners are far more accurate about something they did than about something they imagine doing, and that is what gives these numbers their weight.

What came back is a picture of owners who mostly decide alone and move quickly, almost half of whom negotiate nothing at all, and who are often left to ask for the costs that matter most once the warranty ends. It is also a picture of an industry where the machines largely do their job, and where the difference between an owner who would buy again and one who never will comes down to what happens after the sale.

I'd like to thank every owner who gave us their time and their honesty, because the findings that follow are only as good as the answers you gave us, and you gave us truly candid ones.

TAMARA REID

FOUNDER, INSIDE INDUSTRY

KEY FINDINGS AT A GLANCE

Ten numbers that sum up how owners buy treatment devices, each drawn from the 150 owners in this study.

75.0%



of owners said nobody else had a real say in the final decision or could have stopped it

25.0%



said the opinion that carried the most weight, apart from their own, was their spouse or partner outside the business, the most common answer of all

38.6%



seriously considered only the device they bought

45.5%



negotiated nothing beyond the headline price and accepted what was offered

13.6%

TOLD UPFRONT 13.6%



HAD TO ASK OR NEVER FOUND OUT 45.5%



were told upfront what servicing costs once the warranty ends, while 45.5% had to ask or never found out

KEY FINDINGS AT A GLANCE (CONT.)

Ten numbers that sum up how owners buy treatment devices, each drawn from the 150 owners in this study.

47.7%

ASKED OTHER OWNERS 47.7%



GIVEN CONTACT DETAILS 9.1%



researched by asking other owners privately, yet only 9.1% were given contact details of other owners using the device

50.0%

RANKED TGA TOP FIVE 50.0%



LOOKED IT UP THEMSELVES 40.9%



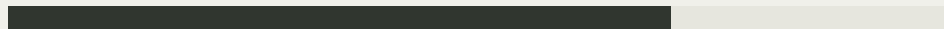
ranked TGA or ARTG status in their top five factors, yet only 40.9% of all owners looked it up themselves

52.3%



said something a supplier did lost that supplier their business

70.5%



use their device every day they are open or several times a week

18.2%

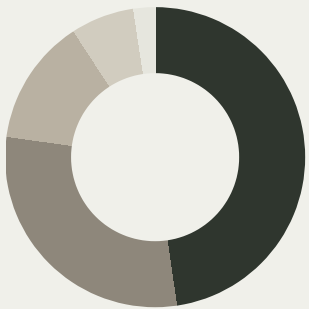


said the purchase was planned and budgeted for well ahead of time

WHO TOOK PART

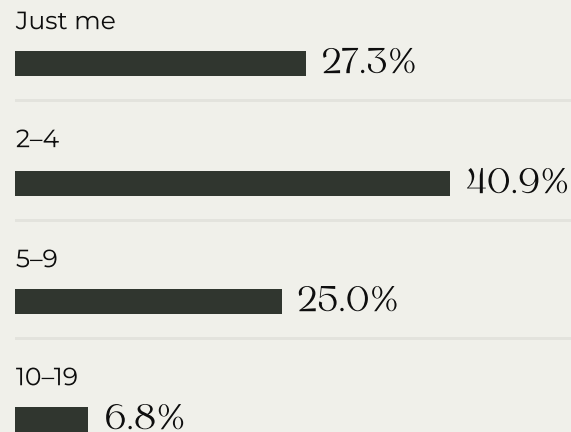
The 150 owners in this study are, for the most part, small business owners running device-based beauty salons and skin clinics, and nearly half of them had acquired a device within the last year.

Business type



Beauty salon that offers advanced or device-based treatments	47.7%
Skin or aesthetic clinic	29.5%
Medi-aesthetic clinic with a doctor, nurse or dermal clinician on site	13.6%
Mobile, home-based or suite-based practitioner	6.8%
Day spa or wellness spa	2.3%

Team size, including the owner

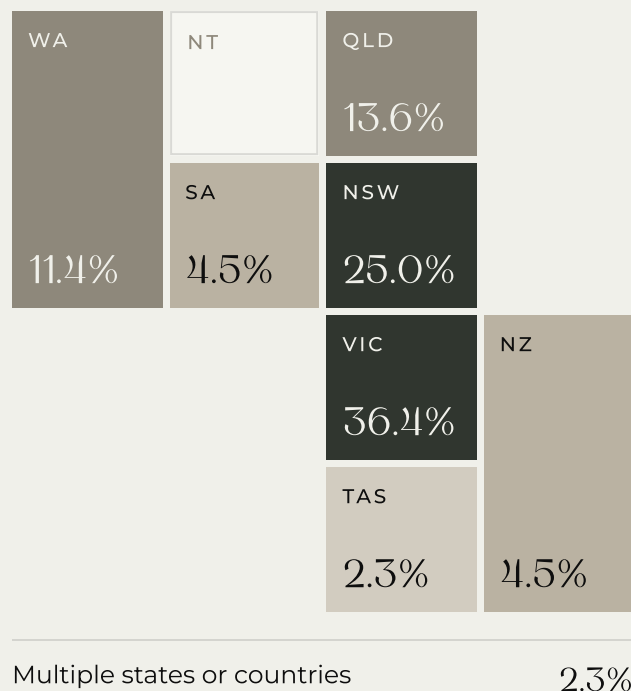


When they most recently acquired a device

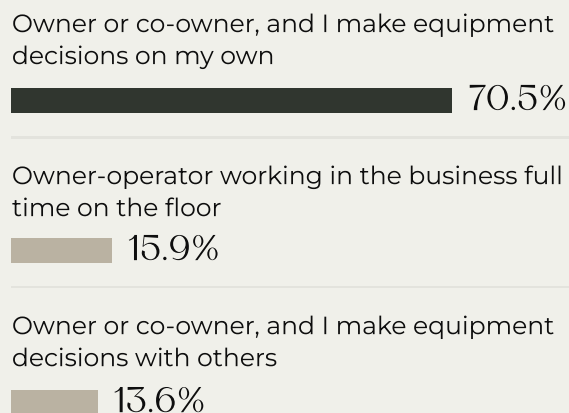


WHO TOOK PART

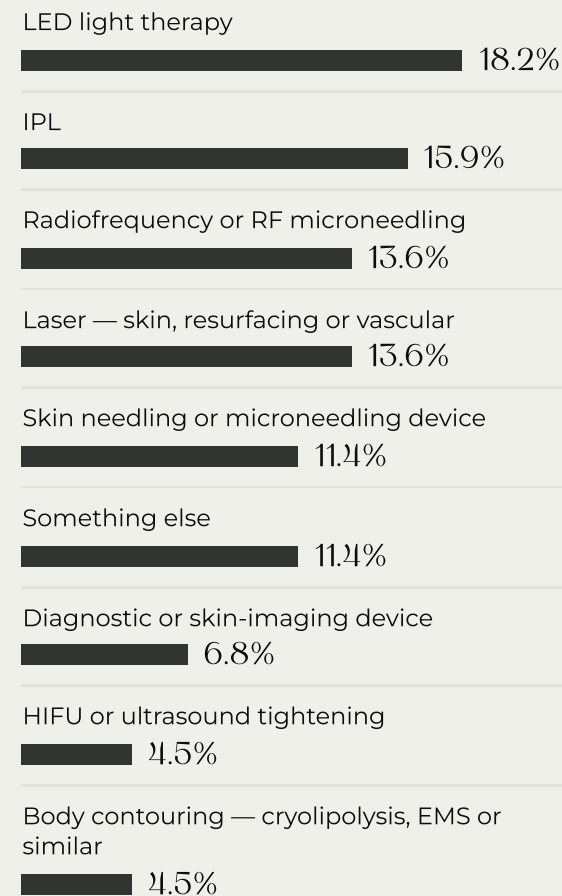
Main location



Role in the business



The device they told us about



01

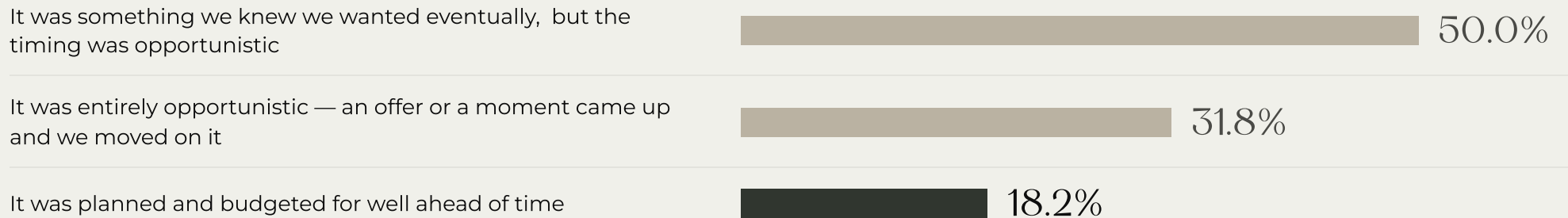
THE SPARK

Most device purchases are not planned and budgeted well in advance, and 18.2% said theirs was. For everyone else the timing was at least partly opportunistic, and two-thirds of owners went from first thought to money changing hands in under three months.

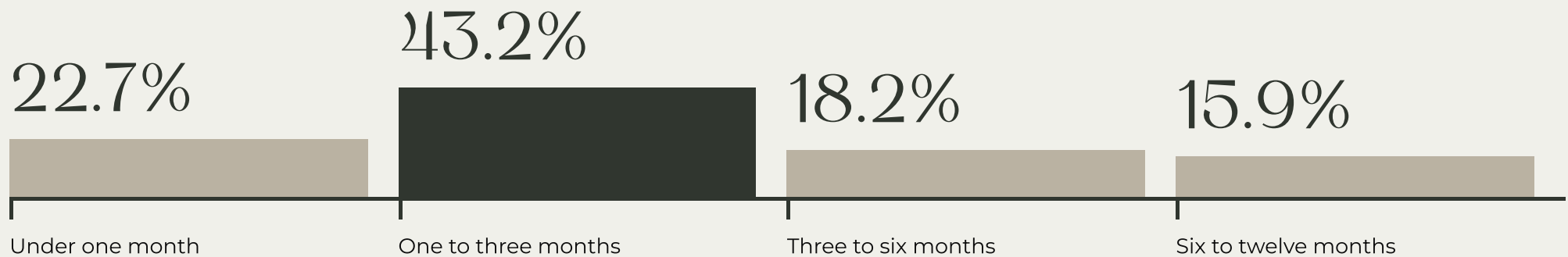
18.2%

**said the purchase was planned and
budgeted for well ahead of time**

Which of these best describes how the purchase came about?



How long was it between first thinking "we should look into this" and money changing hands?



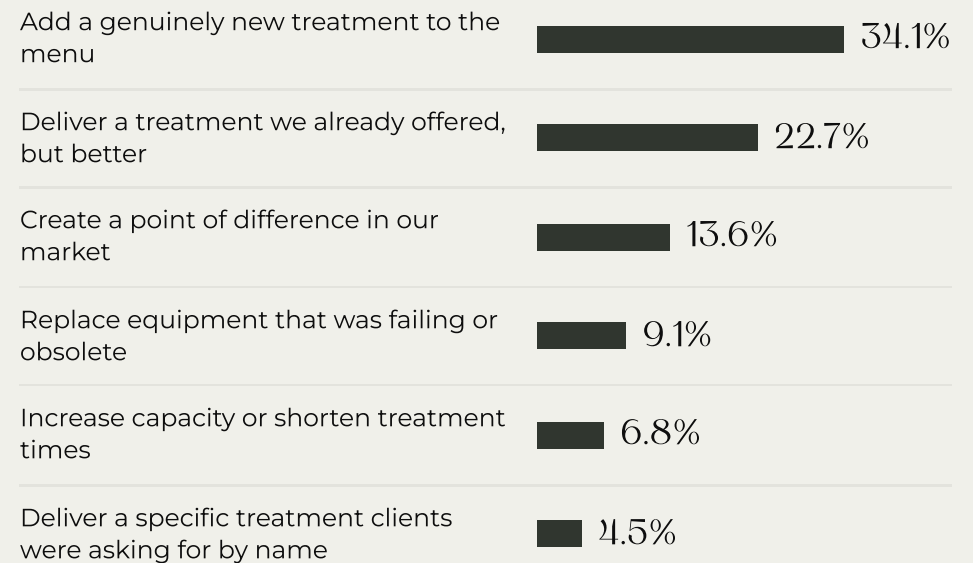
When we asked what set the decision in motion, the most common answer was demand that owners could not yet meet, with "Clients were asking for a treatment we could not offer" chosen by 20.5%.

Close behind were "Our existing device was ageing, failing or out of warranty" and "I saw it at a trade show, expo or conference", each chosen by 18.2%.

What set the decision in motion? (owners could choose up to three)



What were you primarily trying to achieve with the device?

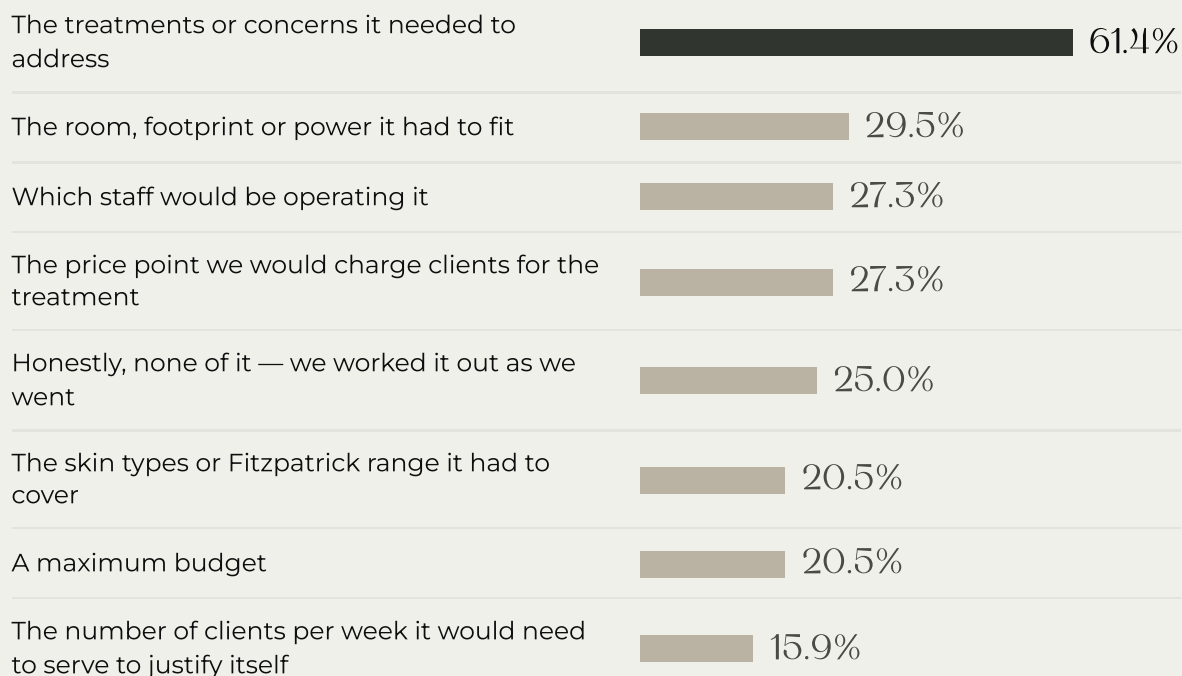


02

KNOWING
WHAT
YOU NEED

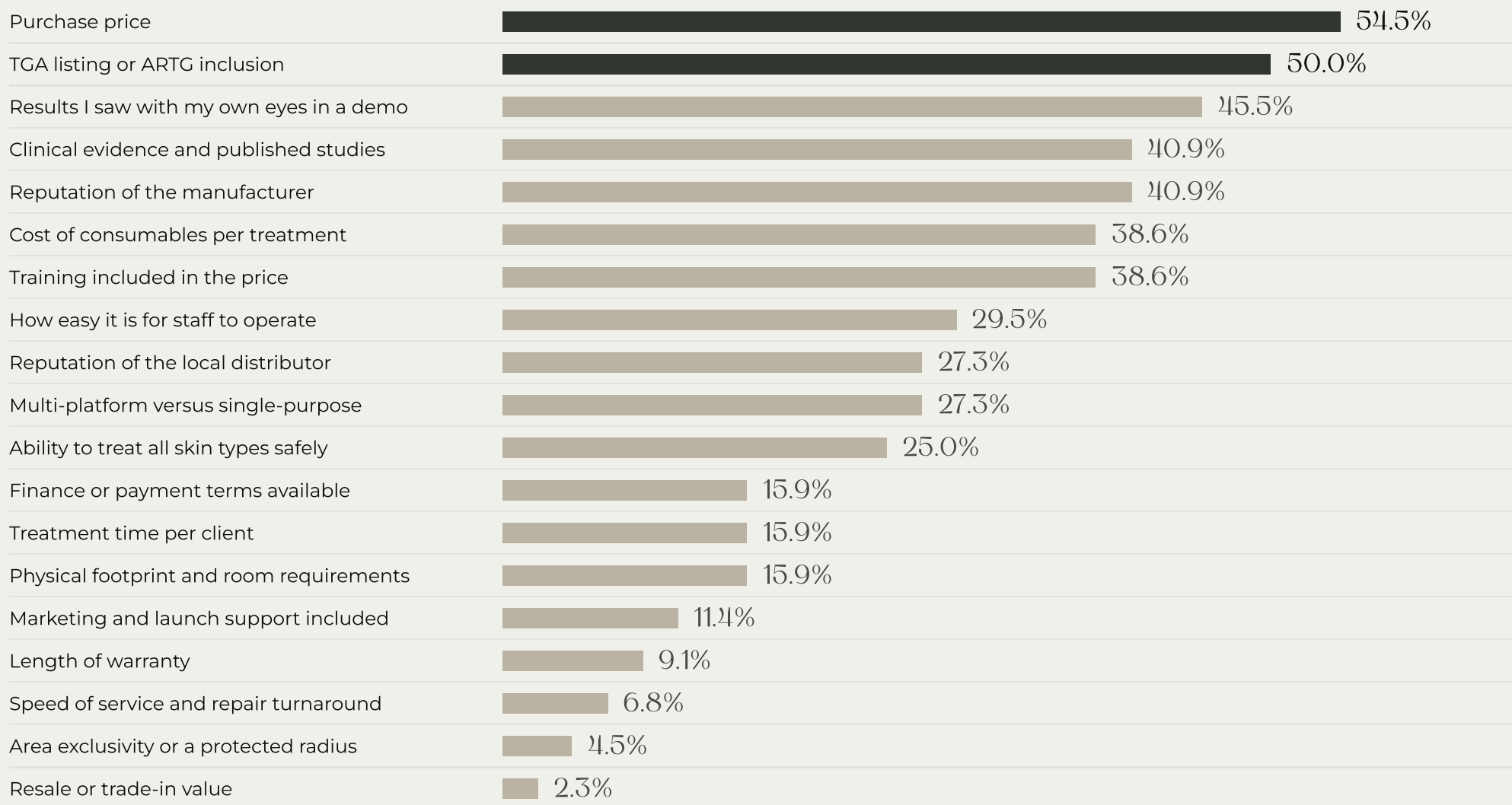
Most owners knew what they wanted the device to treat before they spoke to a supplier, with 61.4% having decided "The treatments or concerns it needed to address".

Far fewer had settled the commercial side, and only 20.5% had set a maximum budget, while 25.0% said "Honestly, none of it — we worked it out as we went".

Before you spoke to any supplier, which of these had you already decided?

OF EVERYTHING BELOW, WHICH FIVE MATTERED MOST WHEN YOU WERE COMPARING MACHINES?

When owners picked the five things that mattered most as they compared machines, price came first, and regulatory status came a close second, picked by exactly half of all owners.

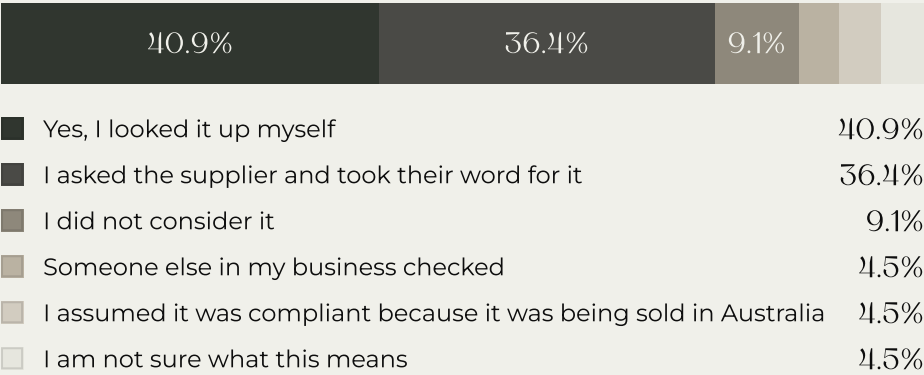


RATED HIGHLY, AND OFTEN TAKEN ON TRUST

Although half of all owners put TGA or ARTG status in their top five, only 40.9% looked it up themselves.

Among the owners who ranked it in their top five, 45.5% said "I asked the supplier and took their word for it".

Did you check the TGA or ARTG status of the device yourself?



45.5% of owners who ranked TGA status top five took the supplier's word for it

SEEING IS BELIEVING, WHEN THERE IS SOMETHING TO SEE

"Results I saw with my own eyes in a demo" was a top-five factor for 45.5%, yet a third of all owners had no demonstration at all, and 20.0% of those who rated demo results so highly did not have one.

Did you require a hands-on demonstration or trial before deciding?



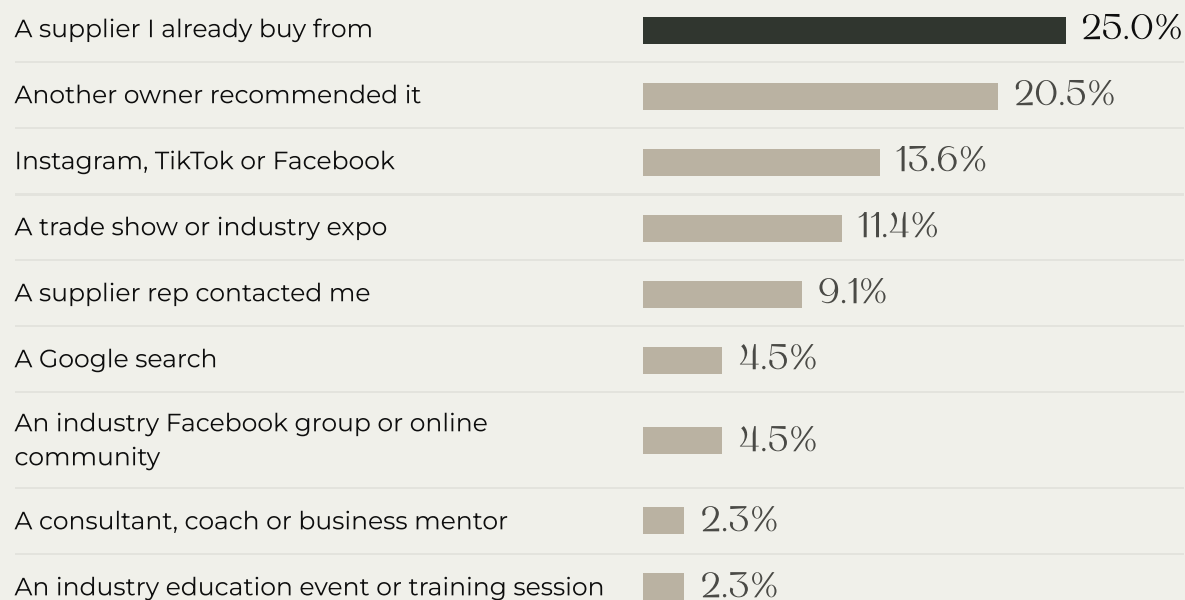
34.1% had no demonstration at all

03

FINDING THE
MACHINE

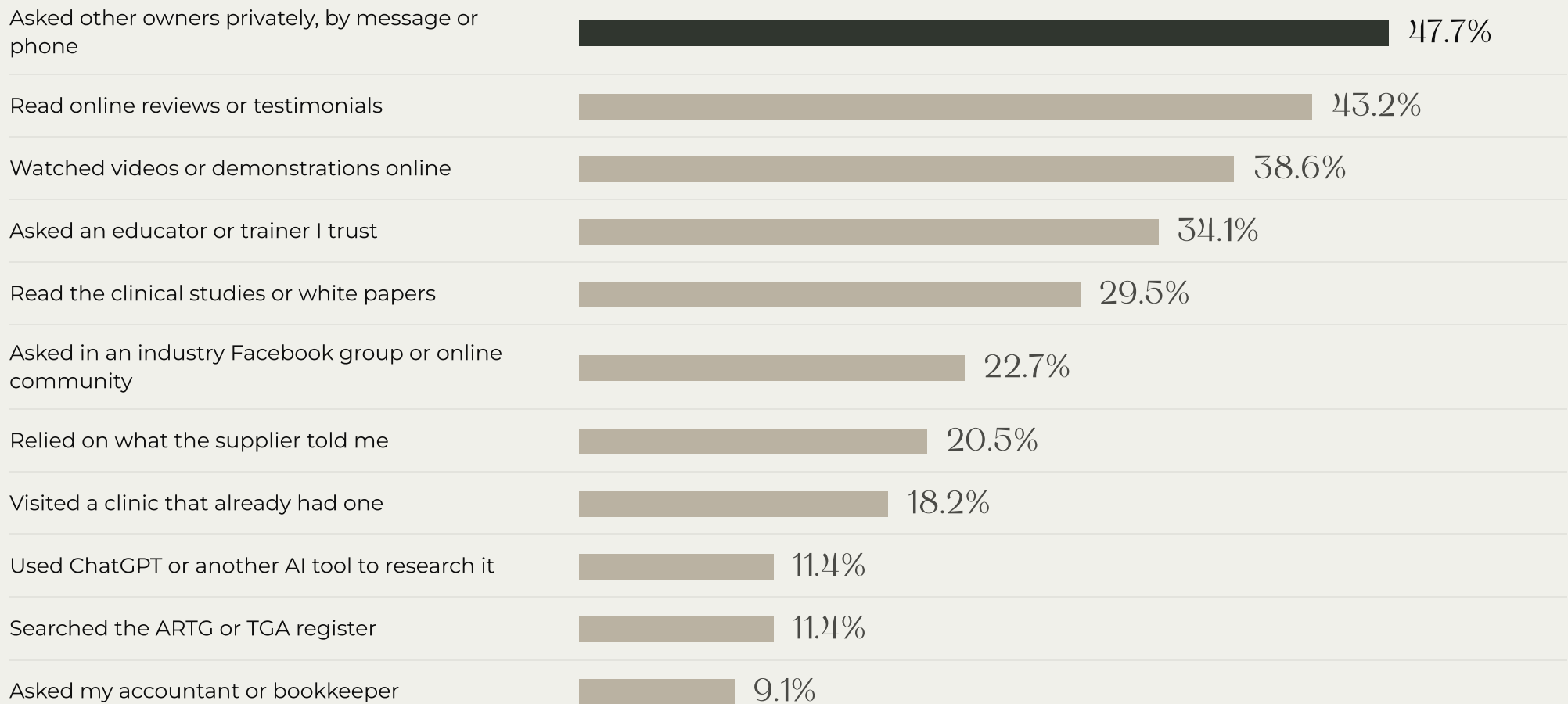
The most common way owners first heard about their device was through a supplier they already bought from, which was the case for 25.0% of owners, followed by a recommendation from another owner for 20.5%.

Owners who first heard through an existing supplier were also among the most loyal afterwards, with 72.7% of them scoring 9 or 10 when asked how likely they were to buy from that supplier again.

Where did you first become aware of the device?

WHICH OF THESE DID YOU ACTUALLY USE TO RESEARCH YOUR OPTIONS?

When it came to research, owners turned to each other first. Almost half asked other owners privately, by message or phone, which was more than read reviews, watched videos online or read the clinical studies, and only 20.5% said they relied on what the supplier told them.

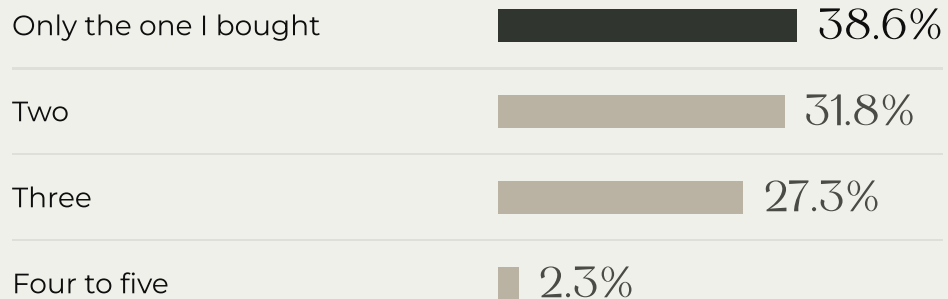


ALMOST FOUR IN TEN NEVER COMPARED

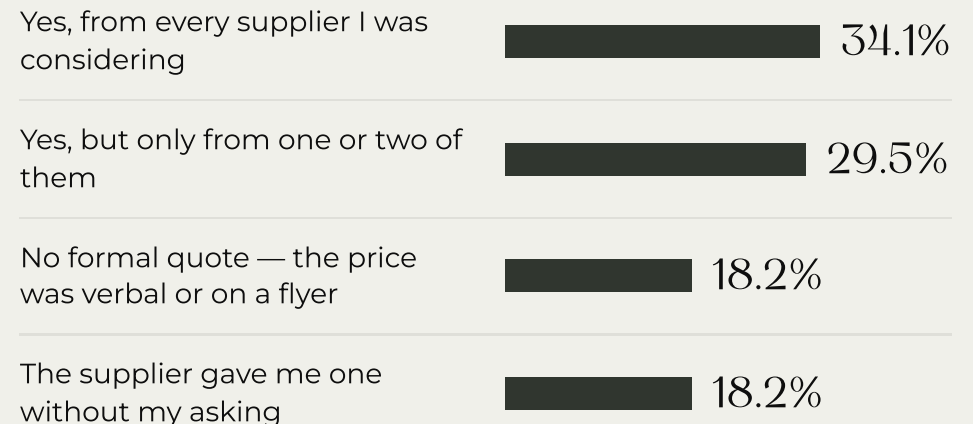
38.6%

38.6% of owners seriously considered only the device they bought, and just 29.5% looked at three or more.

How many different devices or suppliers did you seriously consider before deciding?



Did you get a formal written quote or proposal?



04

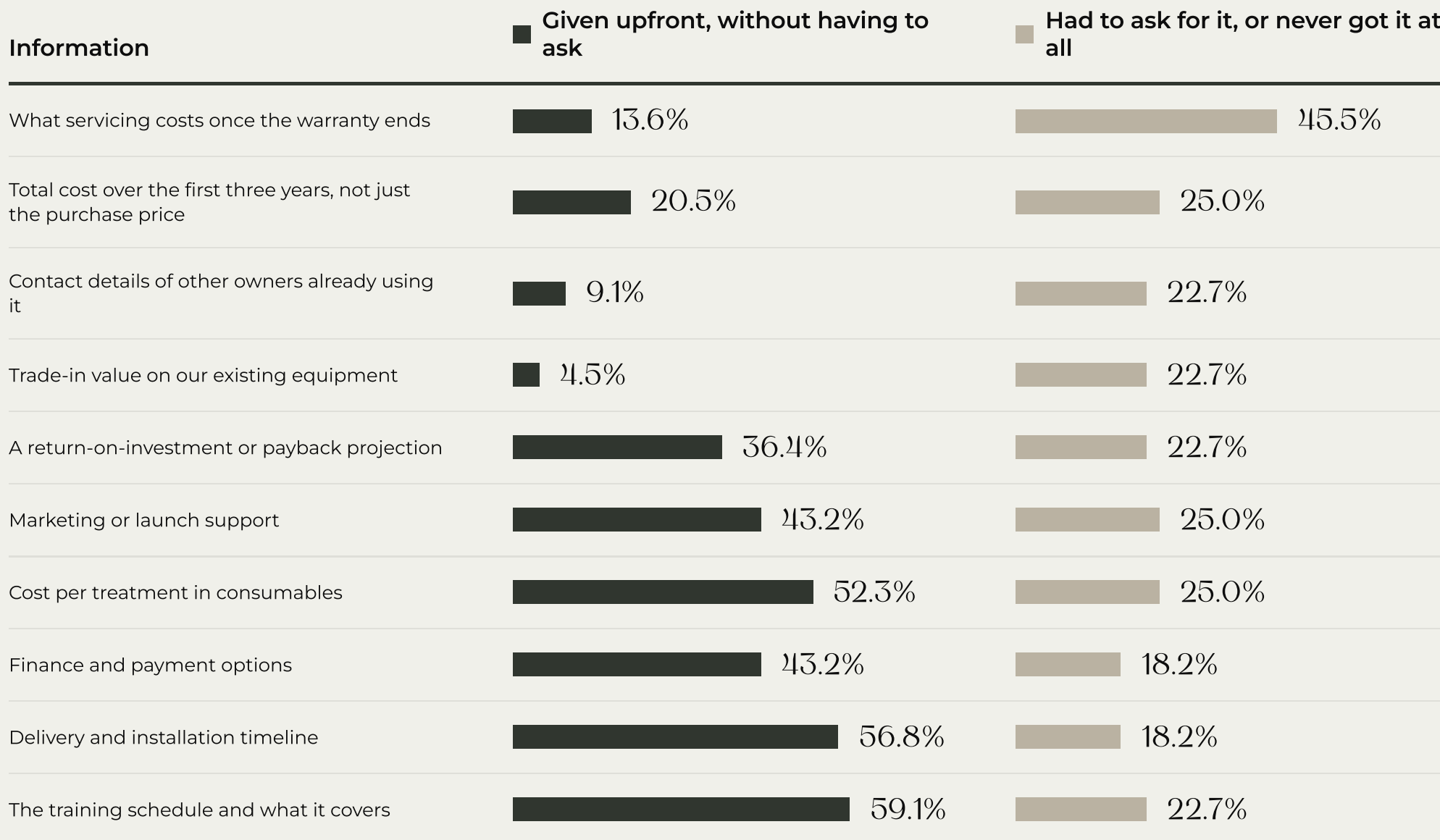
WHAT
SUPPLIERS
TOLD THEM,
AND WHAT
THEY DIDN'T

The costs that matter most once a device is in the room are the ones owners were least likely to be told about. Only 13.6% of owners were given "What servicing costs once the warranty ends" without having to ask, while 45.5% had to ask for it or never got it at all, which makes it the single biggest gap in how devices are sold.

The same pattern runs through the information owners rely on most. Almost half of all owners researched by asking other owners privately, yet only 9.1% were handed "Contact details of other owners already using it" upfront.

13.6%

**were told upfront what servicing costs once
the warranty ends**



18.2% of owners said they were given "None of these" upfront, and 31.8% said "None — I was given everything I needed".

05

THE
DECISION
AND
THE DEAL

What owners say matters when they compare machines is not what closes the sale.

Purchase price was the factor most often ranked in the top five, by 54.5% of owners, yet only 15.9% said "Price or the deal on offer" was the one thing that decided it.

The most common deciding factor was "The brand's reputation in the industry", for 25.0% of owners, and while demo results were a top-five factor for 45.5%, "The results I saw in the demonstration" decided it for only 4.5%.

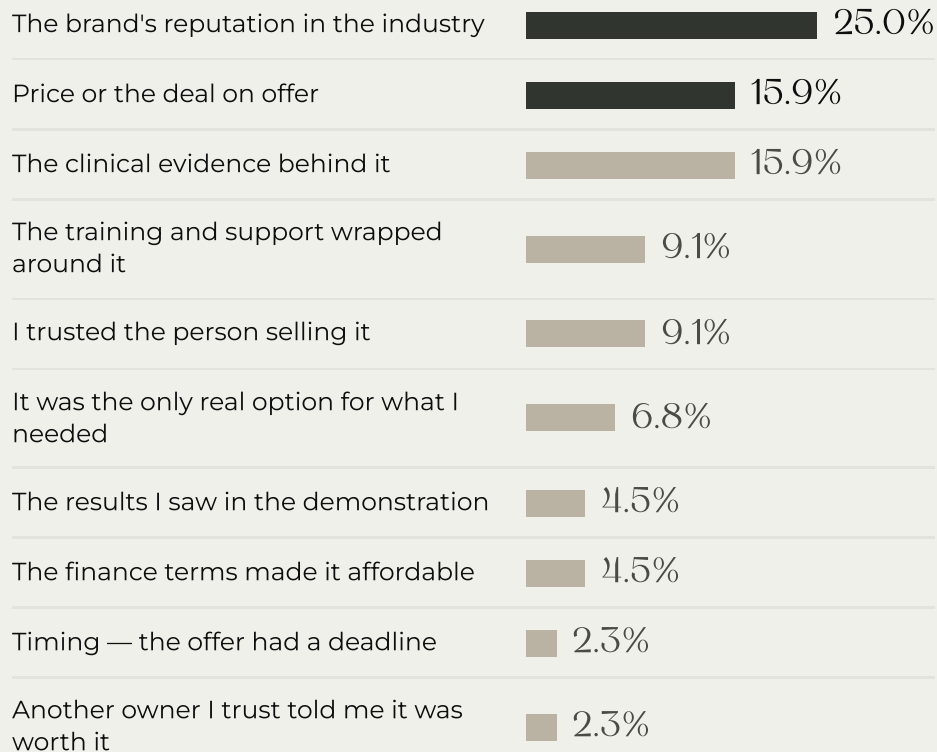
54.5%

ranked purchase price in their top five

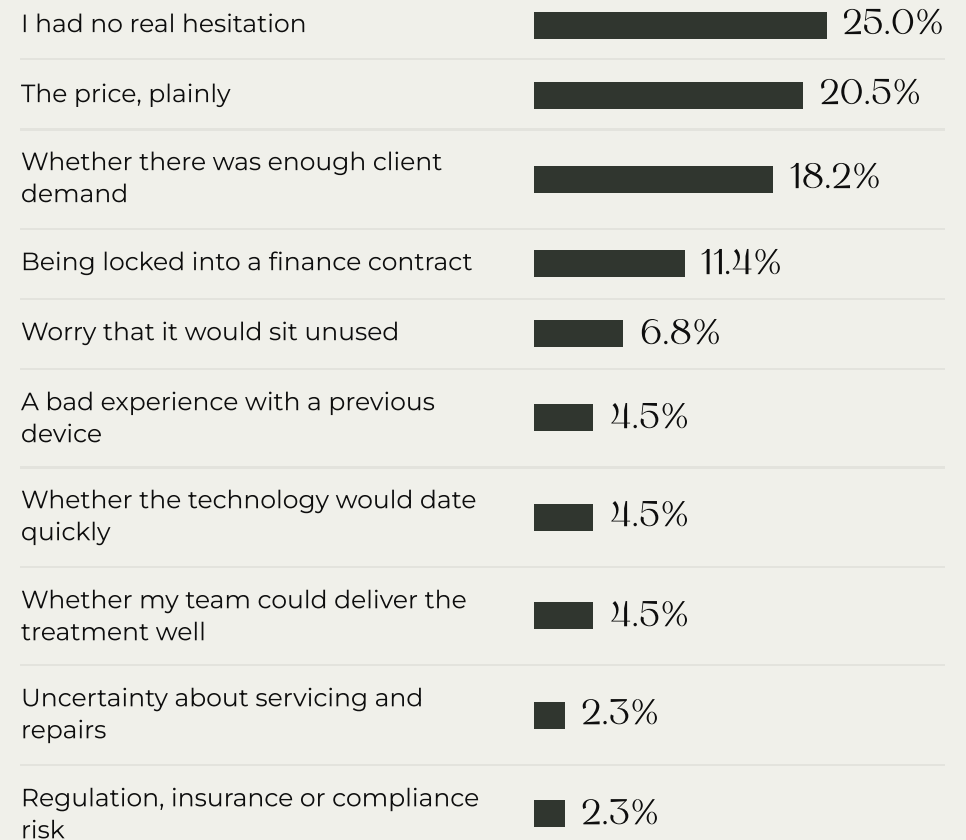
15.9%

said price was the one thing that decided it

WHAT WAS THE ONE THING THAT ULTIMATELY DECIDED IT?



WHAT WAS YOUR BIGGEST HESITATION BEFORE COMMITTING?



HOW SUPPLIERS LOSE THE SALE

More than half of all owners, 52.3%, said something a supplier did had lost that supplier their business, and the most common reasons were about how the sale was handled rather than the machine itself.

52.3%

said something a supplier did lost that
supplier their business

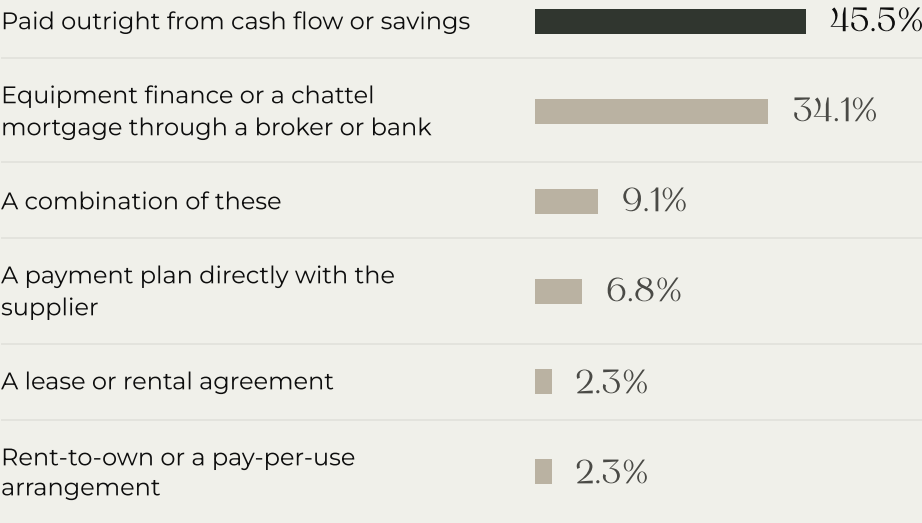
Did anything a supplier did lose them your business?



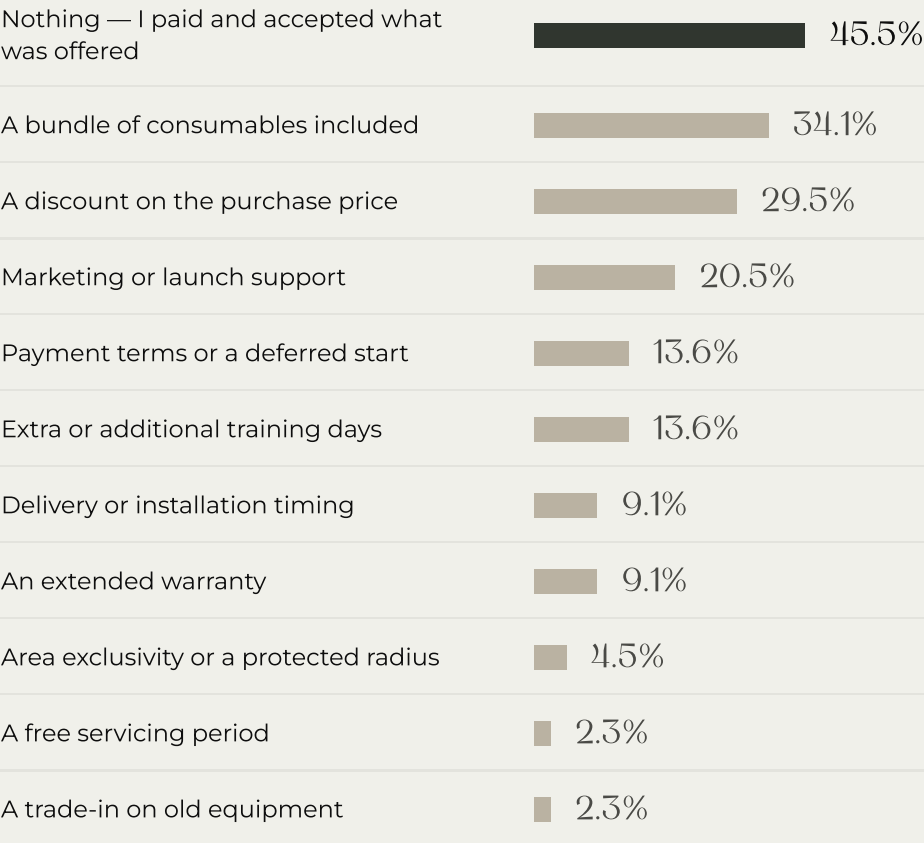
PAYING, AND ALMOST HALF NOT NEGOTIATING

The most common way to pay was outright, from cash flow or savings, for 45.5% of owners. The same share, 45.5%, negotiated nothing beyond the headline price. Among those who did negotiate, consumables and a price discount were the levers they pulled, while an extended warranty and free servicing barely featured, even though servicing costs after the warranty were the information owners were least likely to be given.

How did you pay for it?



What did you negotiate on, beyond the headline price?



06

AFTER
THE SALE

For most owners the machine earns its place quickly. 61.4% had a first paying client within two weeks of the device arriving, 70.5% now use it every day they are open or several times a week, and 43.2% say it has performed above or well above what they expected financially, against 9.1% who say it has fallen below.

70.5%

use it every day they are open or several times
a week

How long was it between the device arriving and your first paying client on it?



How has it performed against what you expected financially?



How often is it used in a typical week now?

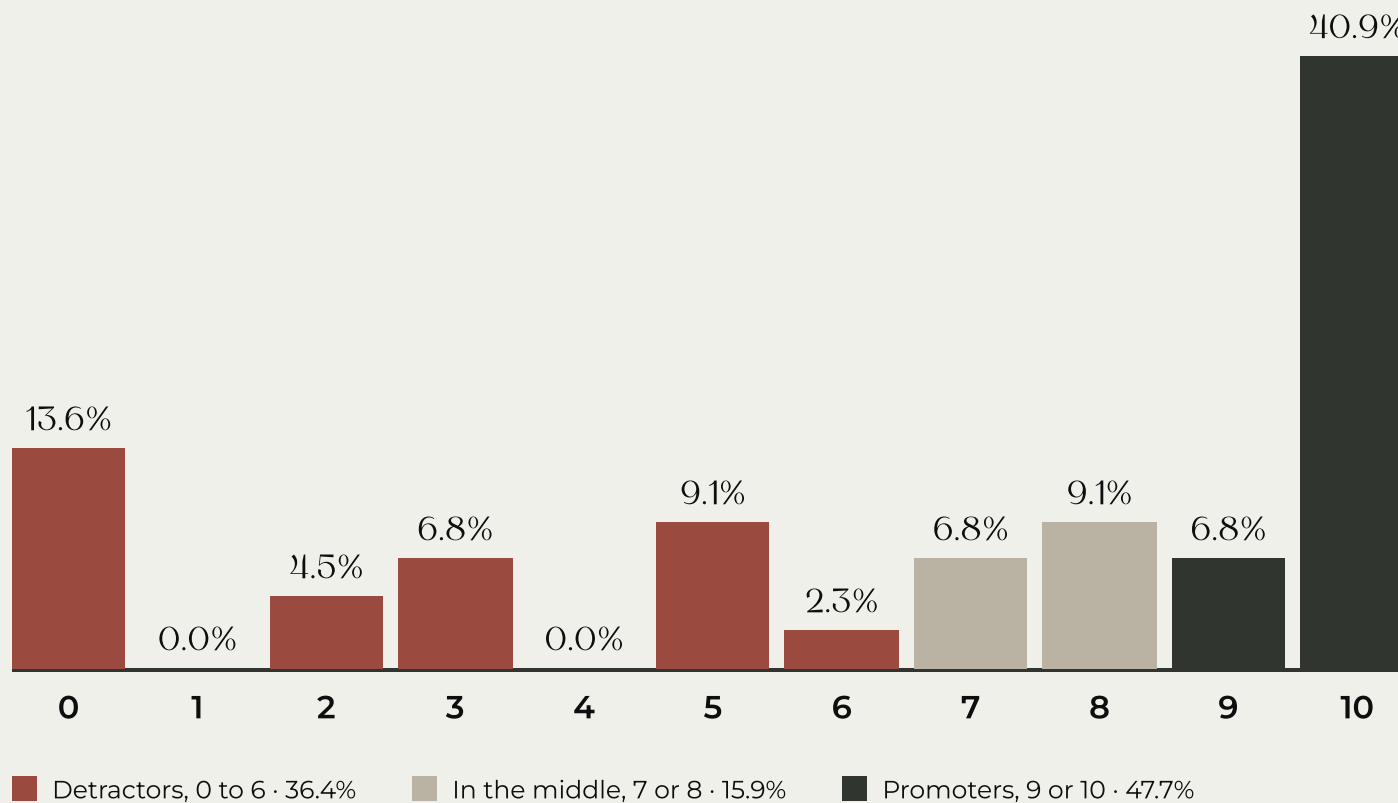


At the other end, 18.2% of owners use their device less than once a week or not at all. Half of the owners whose device is not currently in use also said it was too early to judge its financial performance.

LOYALTY IS DECIDED AFTER THE SALE

When we asked how likely owners were to buy from the same supplier again, on a scale of 0 to 10, the answers split sharply. 40.9% gave a 10 and 13.6% gave a 0, which leaves 47.7% as promoters scoring 9 or 10, 15.9% in the middle on 7 or 8, and 36.4% as detractors on 6 or below, for a net score of +11.4.

How likely are you to buy from that supplier again? (0 to 10)



NET SCORE

+11.4

47.7% promoters minus
36.4% detractors

The unhappy owners are mostly not unhappy with the machine, since 68.8% of detractors said it had performed about as they expected financially.

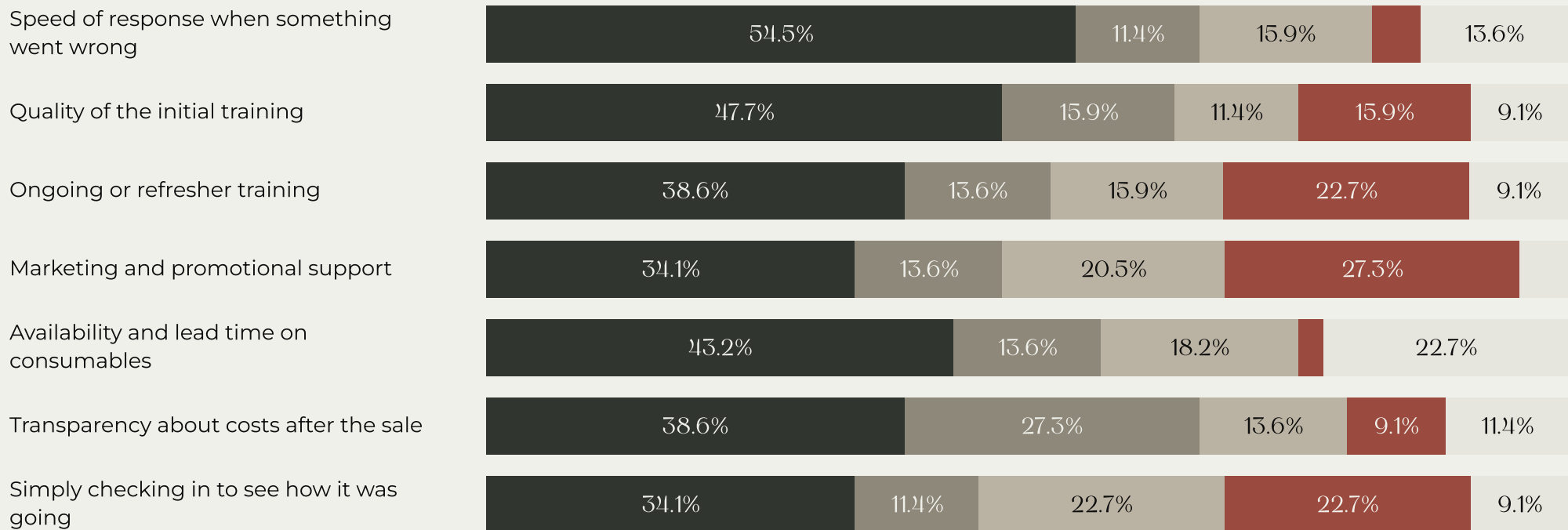
What separates them from the promoters is the support that came after the sale.

HOW THE SUPPLIER PERFORMED AFTER THE SALE

	PROMOTERS	DETRACTORS
Quality of the initial training rated "Excellent"	85.7%	0.0%
Ongoing or refresher training rated "Poor"	0.0%	50.0%
Marketing and promotional support rated "Poor"	4.8%	56.3%
Simply checking in to see how it was going rated "Poor"	0.0%	37.5%

HOW HAS THE SUPPLIER PERFORMED SINCE THE SALE? (ALL 150 OWNERS)

■ Excellent
■ Good
■ Adequate
■ Poor
■ Not applicable



07

WHO ELSE IS IN THE ROOM

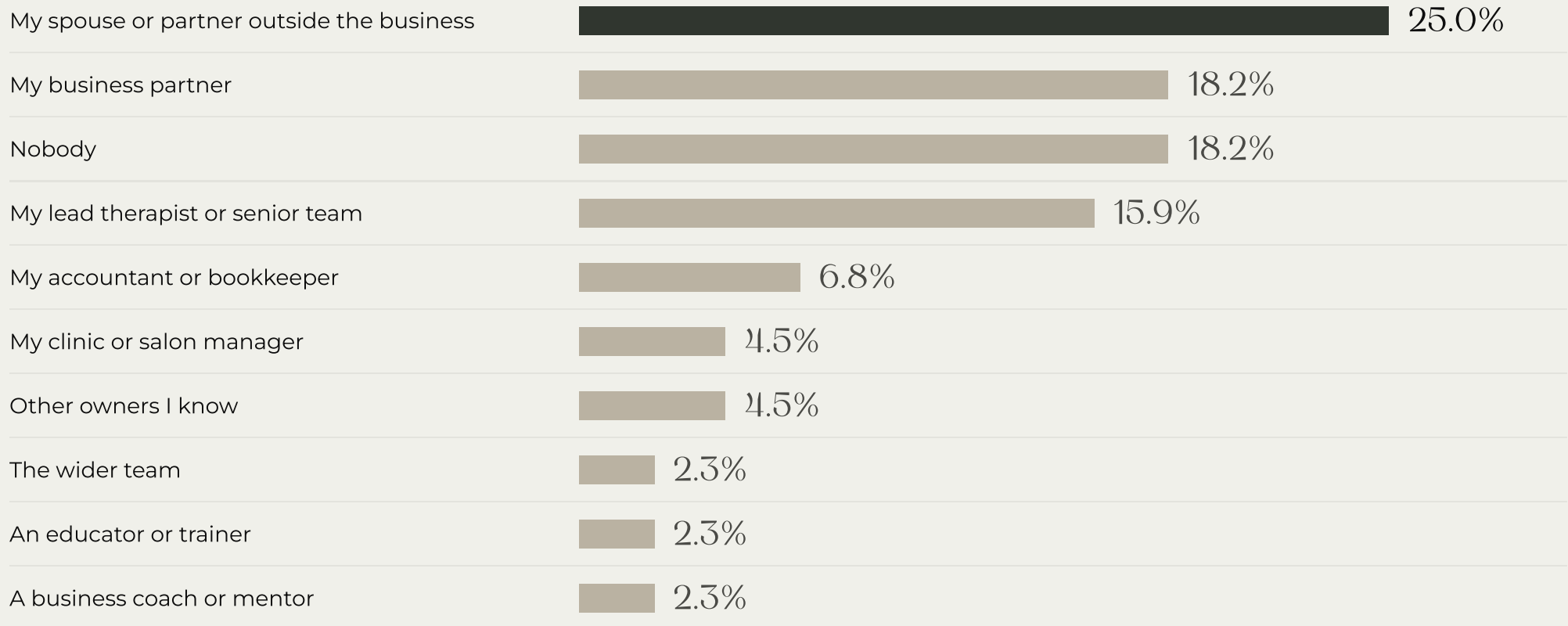
For three in four owners the decision was theirs alone. 75.0% said nobody else had a real say in the final decision or could have stopped it, and 61.4% did all of the research themselves.

Where someone else's opinion did carry weight, the most common answer was a spouse or partner outside the business, for 25.0% of owners, and that is the person a supplier is least likely ever to meet.

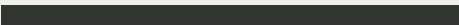
75.0%

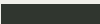
said nobody else had a real say in the final
decision or could have stopped it

WHOSE OPINION CARRIED THE MOST WEIGHT, APART FROM YOUR OWN?



Who first raised the idea, or brought it to you? (owners could choose more than one)

Nobody — it was entirely my own idea
 61.4%

My lead therapist or senior team
 13.6%

Other owners I know
 11.4%

My business partner
 6.8%

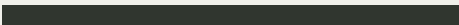
An educator or trainer
 6.8%

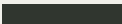
A business coach or mentor
 2.3%

The wider team
 2.3%

My accountant or bookkeeper
 2.3%

Who did research, or helped shape what you needed? (owners could choose more than one)

Nobody — I did all of it myself
 61.4%

The wider team
 15.9%

An educator or trainer
 13.6%

Other owners I know
 13.6%

My lead therapist or senior team
 13.6%

My business partner
 11.4%

My clinic or salon manager
 6.8%

My accountant or bookkeeper
 6.8%

A business coach or mentor
 4.5%

A finance broker or lender
 4.5%

Who had a real say in the final decision, or could have stopped it? (owners could choose more than one)

Nobody — it was entirely my call
 75.0%

My business partner
 15.9%

My spouse or partner outside the business
 9.1%

My accountant or bookkeeper
 4.5%

The wider team
 4.5%

A business coach or mentor
 2.3%

Other owners I know
 2.3%

My clinic or salon manager
 2.3%

My lead therapist or senior team
 2.3%

A finance broker or lender
 2.3%

08

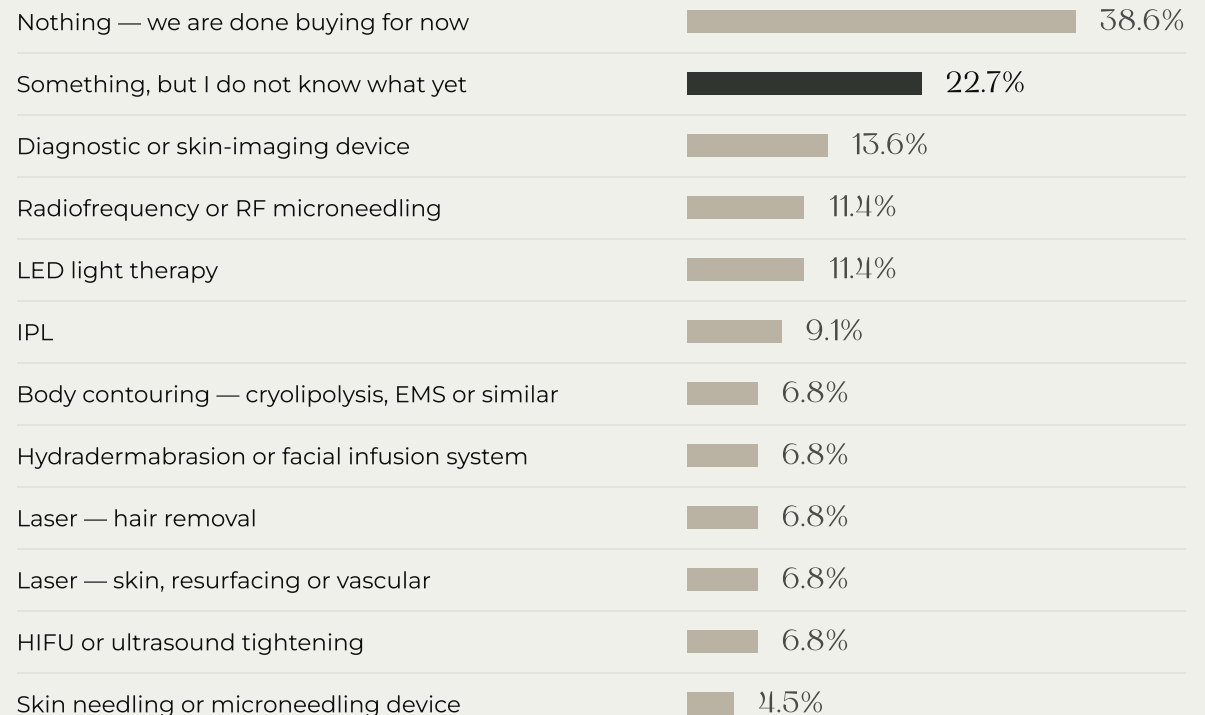
LOOKING
AHEAD

Across the next twelve months, 38.6% of owners said they are done buying for now, but another 22.7% intend to buy something and do not yet know what, which makes them the most open group in the market. Among the owners who named a category, diagnostic or skin-imaging devices came first.

22.7%

plan to buy and do not yet know what

What are you most likely to add in the next twelve months? (owners could choose more than one)



WHAT THIS MEANS FOR DEVICE SUPPLIERS

The owners in this study are telling suppliers that the sale is won on trust and lost on how it is handled, and that loyalty is earned after the invoice is paid. Six things follow from what they said.

1.

Put the full cost on the table before you are asked.

Servicing costs once the warranty ends were given upfront to only 13.6% of owners, and the total cost over three years to 20.5%. An owner who finds these out later is an owner who will not buy from you again.

2.

Connect owners with other owners.

Asking other owners privately was the most-used research method, yet only 9.1% were given contact details of existing users without asking. A supplier who makes that introduction is joining the conversation that is happening anyway.

3.

Sell to the person you will never meet.

Three in four owners decide alone, and the most influential voice beside their own is a spouse or partner outside the business. Material that an owner can take home and talk through is worth more than one more meeting.

4.

Ease off the pressure.

Being too pushy, not being straight about price and manufactured deadlines were the three most common reasons owners walked away from a supplier, and more than half of all owners had walked away from one.

5.

Back your regulatory status with evidence owners can check.

Half of owners rank TGA or ARTG status in their top five, yet many take the supplier's word for it. Making that status easy to verify builds the reputation that decided more sales than anything else.

6.

Treat the sale as the start, not the finish.

The machines largely deliver, and what separates an owner who would buy again from one who never will is ongoing training, marketing support and simply checking in.

HOW TO MAKE THE MOST OF THIS DATA

This report is built to be used, and the brands and distributors who get the most from research like this are the ones who take it into the rooms where decisions about selling are made. Here is how we would put it to work.

01

REVISIT YOUR SALES PROCESS

With 38.6% of owners seriously considering only the device they bought, and 45.5% negotiating nothing beyond the headline price, the first conversation a supplier has with an owner is often the only one they get. Walk your team through chapters 3 to 5 and hold your current process up against them, asking at what point an owner hears the full cost of ownership, including what servicing costs once the warranty ends, and at what point you offer to introduce them to an owner who already uses the device.

02

RETHINK YOUR OUTREACH APPROACH

More than half of all owners (52.3%) said something a supplier did lost that supplier their business, and the reasons at the top of the list were too much pressure and not being straight about price. Owners research by asking each other privately, and the most influential voice beside their own is a spouse or partner outside the business, so outreach that gives an owner something clear to share with a peer or take home will travel further than another follow-up call.

03

STRENGTHEN YOUR POST-PURCHASE ONBOARDING SOP

Loyalty is decided after the sale. 85.7% of promoters rated the initial training excellent, against none of the detractors, and half of all detractors rated ongoing training poor. Use chapter 6 to review your onboarding SOP from the first training session through to the moment someone simply checks in to see how the device is going, and put those check-ins in the calendar so they happen whether or not anyone remembers.

WHERE TO SHARE THE FINDINGS



National sales meetings, where your field team can test their own approach against what owners told us.



Internal WIP meetings, where a single chart can anchor a focused conversation about one part of your sales process.



Board presentations, where the numbers support a case for investing in after-sale training and support.



Distributor education conferences, where the findings help your partners sell the way owners actually want to buy.

The findings land best when they are presented to the people who shape how you sell, and we have seen four settings work particularly well.

GUEST SPEAKER

BRING TAMARA INTO THE ROOM

If you would like the findings presented for you, Tamara can join any of these settings as a guest speaker, presenting the research and what it means for your brand and your team. Get in touch with the Inside Industry team to book.

[Book Tamara](#)

IN THEIR OWN WORDS

ON PRICE AND TRANSPARENCY

"An email offer that includes the PRICE. I'm sick to death of the model of 'salon owner chases distributor to beg to be given a presentation and price structure later.' Stop wasting everyone's time. Publish the prices online. Put the full price in every marketing email. I might see that and know I can't afford it today, but I would know what I can work towards . If you're not embarrassed about the price, disclose it upfront."

These are owners' own words, exactly as they wrote them. Where an owner named a supplier, brand or product, the name has been replaced with "(redacted)", and nothing else has been changed.

"I dislike device rep culture deeply. It's led me to mostly buy second hand. The biggest reason I don't own more devices is because I don't appreciate being put in the position where I have to APPEAR to be super committed just to find things out. Then, if it's not for me, it's an embarrassing withdrawal. They are still working in a 1980s style 'get a conversation going then they'll feel too embarrassed to pull out' model. It doesn't work on me and makes me determined not to deal with that business."

"THE ONLY BUSINESS I
KNOW OF WHO DO
NOT DO THIS IS
(REDACTED), WHO
WILL SEND A FLYER
WITH THE PRICE, AND
(REDACTED), WHO
ARE PROBABLY THE
MOST ETHICAL
OPERATOR IN THE
AUSTRALIAN MARKET
AND IT STANDS OUT."

"GAVE ME A PRICE THEN TOLD ME ITS EXTRA FOR FREIGHT, EXTRA WITH GST, EXTRA FOR TRAINING."

"Reps like this are very pushy and always want to talk on the phone and rarely appreciate times and that you are working and just want the information clearly outlined in an email with every detail they are so secretive about prices when it should be clear before you even reach out to them no one wants to find a machine they like only to enquire play back and forward with phone calls and then be quoted something that is no viable for the business and then constantly following up when they know you cannot afford it because it feels like they are trying to get their bonus that month"

"I HAVE HAD BDMS HOUND ME MULTIPLE TIMES A WEEK AFTER SENDING THROUGH AN ENQUIRY, EVEN WHEN I'VE BEEN CLEAR ON MY TIMELINE FOR MAKING A DECISION. THEY HAVE DISREGARDED AND NOT LISTENED TO ME OR MY NEEDS AND I HAVE NOT PERUSED WORKING WITH THEM DUE TO THIS. THIS HAS HAPPENED 3 TIMES IN 18 MONTHS"

"Make sure proper sales agreement is in place, not to be pressured into signing things when I was not ready. Know my rights for terms and conditions for loan approvals"

"BOTH SUPPLIERS WERE EXCELLENT BUT ONE CHANGED SERVICING REQUIREMENTS/ COSTS AFTER PURCHASE AND IT'S SIGNIFICANTLY IMPACTED WHETHER I'D BUY AGAIN. PAYING \$30K PER YEAR IN SERVICE FEES IS NOT SOMETHING I WILL EVER CONSIDER AGAIN. BOTH SUPPLIERS WERE RELIABLE HOWEVER AND THIS WAS LARGELY A DECISION MADE IN THE US."

"(redacted) pushed hard and were lovely when they knew they were getting a sale, then increased consumable costs of the (redacted) paddles from \$5000 to \$15000, and would limit us for reducing the price of our RRP when we wanted to promote a sale"

"NO ONE HAS EVER CONTACTED ME SINCE"

"Once the sale was made, the online training offered with poor. I was hoping someone would come out and I haven't heard from them since"

"Education included in the price in clinic in TAS, or \$xxx in travel incentive to come to a city. The travel to education thing becomes extremely expensive, and most of the time cannot be done in one day."

"THEY TREAT ME LIKE I'M THEIR BIGGEST CLINIC! NOTHING IS TOO MUCH TROUBLE."

"My BDM calls regularly to check in with me, even if I don't have time to answer her or have any problems."

"Better business development rather than just a sell in"

METHODOLOGY

What Salon Owners Want: Devices Edition is an online survey of owners of salons, skin clinics, day spas and aesthetic clinics across Australia and New Zealand, run by Inside Industry between 24 August and 09 October 2026.

How the survey worked. Every owner was asked to think about the most recent treatment device they had acquired, whether they bought, leased, financed or rented it, and to answer every question about that one purchase. The questions follow the eight phases of business-to-business buying, from what set the purchase in motion through to how the device and its supplier have performed since, with a closing section on who else was involved in the decision. Only owners and co-owners took part, and owners who had never acquired a device were routed to a short separate set of questions.

Who is counted. The findings in this report are based on 150 owners who had acquired a treatment device. We received 166 submissions in total, and before analysis we

removed a block of 14 automated submissions and 2 exact duplicates .

How to read the numbers. Every percentage is a share of the 150 owners and is rounded to one decimal place. Where owners could choose more than one answer, or where a few owners wrote in an answer of their own, the shares will not add to 100%.

Limits. This is a self-selecting panel of owners who chose to respond, not a representative sample of every salon and clinic in Australia and New Zealand, so the findings describe the owners who took part. The sample is reported as a whole, without breakdowns by state, business type or device category, because those groups are too small to report reliably on their own.

Anonymity. Individual responses are never published or shared with suppliers, and only combined findings appear in this report. Owners' own words are quoted exactly as written, except that the name of any supplier, brand or product has been replaced with "(redacted)".

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