Future of hairdressind

BRITISH BEAUTY COUNCIL

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Future of hairdressind

Insight & Strategy

REPORT FOR THE BRITISH BEAUTY COUNCIL

NOVEMBER 2024



BRITISH BEAUTY COUNCIL

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The British Beauty Council is a not-for-profit organisation dedicated to solving beauty's shared challenges and unlocking opportunities for future generations. It represents the wider industry by generating conversation with the Government to tackle issues facing all stakeholders, today and in the future.

Founded in 2018, the Council is dedicated to elevating the voices, opinions and needs of the British beauty industry – from hairdressing to aesthetics, therapy and spa; in education and training; and formulation to manufacture, supply, logistics packaging, design, retail and media.

The Council collaborates with a diverse network of patrons and affiliates so that every sector within the beauty industry can thrive. It is governed by an esteemed Executive Board, which is supported by a 60+ strong Advisory Board from across the beauty industry. With this backing, the non-profit is able to tackle the diverse hurdles facing British beauty and lead the way with policy-driven initiatives that futureproof the whole industry.

Its ambition is to ensure that the beauty industry is recognised and valued at all levels of government, throughout the wider economy, and by consumers. By supporting a successful, innovative, and inclusive British beauty industry, it promotes the interests of people and companies engaged in all sectors of beauty business.

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1. EXECUTIVE SUMMARY

Although the beauty industry is booming, hair salons in the UK are in decline. The industry is struggling with spiralling costs, the number of people completing their apprenticeships has declined, and there are job retention issues, especially among junior hairdressers. These challenges are not new: salon closures pre-date both the COVID-19 pandemic and the cost of living crisis. Nevertheless, they have been exacerbated by both of these events. Simultaneously, there has been a rise in the number of self-employed hairdressers, and other, less traditional set-ups outside the established "salon model".

However, despite these challenges, there are businesses - both old and new - that still manage to thrive in this context. This suggests that there are opportunities for success. With change and innovation identified as a key characteristic of the industry, this report examines different ways of working, building new skills, and capitalising on technology and trends, which many of those in the industry have already embraced.

The qualitative and quantitative research conducted for this report aims to better understand the varied experiences of those working in the hairdressing industry, with a view to shining a light on some of the developments that have shaped the industry over the last decade or so and uncover some of the strategies that might help others succeed.

Specifically, the research sought to answer the following questions:

What is the state of the hairdressing industry today?

What challenges does the sector face? What are the key factors that determine success for those working within it? are succeeding?

How far does the 'salon' model still serve the needs of consumers and those working within the sector?

What does the future of hairdressing look like?

These questions were explored through a phased, mixedmethod approach consisting of¹:

- A review of the existing available data and evidence, such as statistics on salon openings and closures, to better understand the context:
- Exploratory interviews with five high-profile, senior industry stakeholders to further inform the research design;
- Qualitative research in the form of 12 small focus groups with hairdressers from across the UK, including salon owners, salon-employed hairdressers, apprentices, and freelancers, and nine in-depth interviews with hand-picked individuals who are succeeding in the industry; and
- A quantitative survey of 360 hairdressers². All charts in this report are based on this sample unless otherwise indicated.

¹ A more detailed overview of the methodology and sample can be found in the appendix. 2 This survey was distributed via British Beauty Council, as well as manufacturers' communications channels. As it was opt-in only and, as

KEY FINDINGS

As well as being a rewarding, creative career path, hairdressing is seen as a lifetime skill that will always be in demand. Hairdressers feel pride in their skills, and most are committed to consistent innovation and growth. Flexibility and autonomy add to an overall sense of fulfilment in the role. In addition, hairdressing is perceived as a skill that is not at risk of being replaced, including by developments such as AI. **2** However, hair salons keenly feel the economic difficulties affecting small businesses across the country. Rising overheads, higher prices, and lower demand are all significant challenges. 9 in 10 (90%) of hairdressers surveyed say that rising overheads have had a considerable impact on their business, with higher product prices (87%) a close second. Many feel that the industry has not had an opportunity to financially recover from the pandemic.

"Independent salons on the high street, [like]

place at the moment. There will probably be

less salons [in future]."

MOBILE HAIRDRESSER, ENGLAND

any independent business, is just not in a great

"It's such a lucrative, creative industry, there are so many different avenues and routes you can take, and so much money to be made. The opportunities are endless, exciting, and evolving."

SALON OWNER, ENGLAND

5 Industry-specific issues present additional challenges, both for hairdressing's reputation and the everyday experience of those working in it. Two thirds (66%) feel that their business is impacted by junior hairdressers and apprentices not being "business ready". Alongside issues with training and education, many feel that a lack of industry standardisation mean that hairdressing is undervalued by the public and Government. This is at odds with hair professionals' perception of it as a highly skilled and valuable profession.

"A qualification doesn't mean everything. Stylists very rarely come out of college and then can go sit on the salon floor; they need a year of retraining."

SALON OWNER, ENGLAND

Traditional salon employment has become less desirable as a career choice but salon ownership remains the goal for many. Salons are still the place where most hairdressers find their feet and hone their skills: 89% agree working in a salon is an important experience for those starting out. Salon ownership also remains a symbol of success. Nevertheless, salons are more and more likely to be seen as a stepping stone, rather than a place to stay and thrive, whilst a lack of confidence and wider economic challenges mean salon ownership is growing increasingly out of reach.

"In 10 years' time, [I'd like to be] maybe running my own practice, with grant funding perhaps to help pay rent. My savings are probably not enough... finances are always tough. But the dream would be to have my own practice or long client list."

COLLEGE STUDENT, ENGLAND (NEWCASTLE)

Whilst self-employment is seen by many as an attractive alternative to salon employment, it is not a silver bullet. With salon ownership perceived to be out of reach for many, self-employment, with its promise of independence, flexibility, and higher earnings, has become increasingly more attractive. However, some feel it has made the industry less stable, added to retention issues, and makes it even harder for consumers to feel confident in their hairdressers' skills and qualifications.

"Even when renting a chair you can be in a salon driven by targets. You have to pay the bills but it does take away creativity."

RENT-A-CHAIR HAIRDRESSER, ENGLAND

Despite the challenges, there is confidence that the industry will survive and thrive over the longer term. Many of those we spoke to have considered leaving the industry. However, despite this there is a strong belief that hairdressing will always be needed, and that hairdressers' creativity and social skills will allow them to adapt and find new ways to thrive. Among survey respondents, three fifths (61%) feel optimistic about hairdressing in the UK, rising to 71% when thinking about their own career or salon.

"I think it's doing great. It's an established trade, it will go an forever. Most people want their hair cut. It's forever evolving. There's always a new service."

COLLEGE STUDENT, ENGLAND

Chapter 7 of this report lays out some of the opportunities identified through this research, including new business models, successful approaches to marketing, sustainability, inclusion, and pricing, as well as business partnership and mentoring. There are case studies of successful business models – from Medusa's "branchising" approach to Studio B's self-employed salon – and individuals who have achieved success by doing things a little differently, from Muse's Erica Liburd to Not Another Salon's Sophia Hilton.

The **final chapter** presents conclusions and recommendations for industry stakeholders.

2. CONTEXT: THE BIGGER PICTURE

Although the wider beauty and personal care sector is thriving, hairdressing is under-performing

relative to its peers. Research by the Local Data Company shows that, among personal grooming businesses, hairdressers are performing relatively poorly. While there are still more hair salons overall than other personal care businesses (at around 20,000 in 2023), hairdressers' post-COVID growth has once again slumped. Looking at salon openings and closures, there has been a net loss of 425 hairdressers between October 2022 and 2023 in England, Scotland and Wales (including both independent and businesses and those with multiple salons). Meanwhile barbers, beauty salons, and nail salons saw net growth in numbers during the same time period. In the case of barbers, for example, there have been 815 more openings than closures.³

Many in the industry attribute the challenges to the COVID-19 pandemic, or the more recent rise in inflation. However, the trend of hair salon closures pre-dates the pandemic. Looking at the period of 2017-2021⁴, there was a steady decline in hairdresser units, accompanied by an increase in self-employment across the personal care sector.⁵

Hairdressing has been impacted by and adapted to long-term trends and recent crises, leading to significant change in the sector. Changing training needs and standards, shifting client expectations and habits, and economic challenges have changed the way hair professionals train and work. New or growing trends such as the rise of e-commerce and social media marketing have altered relationships between product manufacturers, stylists and clients.

These challenges are reflected in our research. Hairdressers stress that things have been difficult - nearly three guarters (71%) of those surveyed feel that it is harder to work in hairdressing now than it used to be and a similar proportion (69%) of salon owners say it is getting harder to keep salons open.

NUMBER OF HAIRDRESSING UNITS COMPARED TO BARBERS AND BEAUTY SALONS JANUARY 2017-OCTOBER 2023







Q. On a scale of 1-10, to what extent do you agree or disagree with the following? Base: All respondents (n=360)

Source: British Beauty Council - LDC Data (Period September 2022-September 2023) and British Beauty Council Hair & Beauty Sector Analysis 2017-2021.

- 4 Local Data Company for BBCo (2022)
- 5 NHBF (2021) Self-employment in the personal care sector

Nearly three quarters (71%) of those surveyed feel that it is harder to work in hairdressing now than it used to be and a similar proportion (69%) of salon owners say it is getting harder to keep salons open.



WORKING IN HAIRDRESSING IS

3. CHALLENGES FACING THE INDUSTRY



ON A SCALE OF 0-10, HOW MUCH DO THESE CHALLENGES IMPACT YOU OR YOUR BUSINESS? SHOWING % SELECTING IN THE RANGE OF 7-10 FOR EACH OPTION



Q. Here are some challenges facing the industry. How much do you feel these challenges impact you or your business? Base⁻ All respondents (n=360)

*This answer option was shown only to salon owners (n=196)

Whilst rising costs are identified as the most significant challenge facing hairdressing, it is just one challenge of many. Rising costs have been identified as the number one challenge by hairdressers across our research, especially those who are self-employed or own a salon. However, there are also challenges related to client expectations, education, marketing and competition, which come up time and again in conversations with hairdressers.

CHALLENGE: RISING COSTS

Rising overhead costs such as utilities and rent are putting pressure on salons, which are struggling to turn the same profits they did a few years ago. This reflects the challenges faced by the wider hair and beauty sector, where economic challenges are identified as the biggest barrier to growth, and where there is significant concern about energy costs and National Living Wage increases⁶. These issues are keenly felt by those in the hair and beauty sector, which reports higher levels of business ownership, particularly SMEs, but lower turnover than UK SMEs as a whole⁷. Salon owners taking part in this research noted that their already narrow margins are being squeezed, and

HAVE YOU INCREASED YOUR PRICES IN **RESPONSE TO CHALLENGES?**



Q. Which of the following changes, if any, have you made in response to the challenges you are concerned about? Base: All respondents (n=360)

7 Oxford Economics for British Beauty Council (2023) Value of Beauty Report

"Even tea and coffee have gone way up. [Hair] colour, just everything. Obviously, you're scared to put your own prices up, because you know that they're probably struggling too. So, it is a hard one."

SALON OWNER, WALES

that they struggle to make this up elsewhere. As a result, many salon owners have taken a more cautious approach, taking on fewer apprentices or aiming to survive rather than expand. There is a sense that it is harder to employ staff while remaining profitable, and harder to keep existing staff satisfied as they are asked to do more and work harder without being paid more to do so (beyond rises in minimum wage).

In addition, inflation has contributed to increasing product prices resulting in lower profit margins, higher prices for consumers, and, sometimes, a switch to a cheaper supplier and lower-quality products.



HAVE YOU CHANGED PRODUCT MANUFACTURER IN RESPONSE TO CHALLENGES?

⁶ NHBF (2024) State of the Industry Survey Summary - April 2024

"That's another thing, isn't it? You start compromising on quality products because the price is more important than the quality, and that's an issue that shouldn't be happening. We work with [manufacturer], and we do get a good deal on colours. But still, every time I see the bill come through, I go, whoa, okay."

SALON OWNER, WALES

Almost three guarters (72%) have raised their prices in response to rising costs, despite anxiety about their clients leaving or coming less frequently. There is agreement that cost concerns are faced by all small businesses and by the wider beauty sector, however there is also a sense that the hairdressing industry might be more keenly affected by falling demand as DIY styling gains popularity. There is also a perception among hairdressers that clients are now more willing to shop around for cheaper prices, in part because they have little understanding of the work and cost involved in providing the service. Some hairdressers acknowledge that prices for hair services had already been quite high, but there is only so much they feel they can absorb. Self-employed hairdressers in particular find balancing rising prices with customers' declining disposable income difficult.

"You become quite attached and friendly with people but when you have to put up the price, you can lose a customer, even a long-time one." MOBILE HAIRDRESSER, SCOTLAND

Almost three quarters (72%) have raised their prices in response to rising costs, despite anxiety about their clients leaving or coming less frequently.

CHALLENGE: CONSUMER BEHAVIOURS AND DEMAND

Inflation is also affecting customer behaviour. Hairdressers across the industry are seeing reduced demand for their services as customers manage their budgets. Deepening a trend towards lower-maintenance cuts, clients are getting their hair cut and styled less frequently (or in some cases not visiting salons at all) and spend less money on their hair when they do visit salons. Not all hairdressers feel alarmed by this – some see it as part of the natural trend cycle, meaning it may well go out of fashion again.

Clients are more willing to style their own hair and attempt DIY hairdressing to minimise reliance on professional stylists, made possible by direct consumer access to salon-end products for home-use and widely available social media tutorials. Underestimation of the skill needed to successfully style hair means hairdressers are still being called upon to correct mistakes at home, tempering concern about this trend and reinforcing beliefs that hairdressing as an industry is always needed.

"Since there's so many tutorials online and different people who think they know what they're doing who will teach people how to cut their own hair. And they don't know what they're doing, but people will copy them and do it, and then they'll come into the salon with this mess of a haircut asking you to fix it. It's massive since lockdown, because everybody was trying stuff."

SALON EMPLOYED, ENGLAND

However, there are more worrying trends too, such as clients feeling more empowered to negotiate prices, refuse to pay after receiving a service or go to the competition in search of lower prices, which are felt to be harder to overcome in the current climate.

"It's hard and demanding and I can put myself under a lat of pressure to be accommodating, and I find that stressful. Clients don't always have boundaries and that can be challenging."

FREELANCE HAIRDRESSER, ENGLAND











Q. Which of the following changes, if any, have you made in response to the challenges you are concerned about? Base: Salon owners (n=196)

CHALLENGE: TRAINING, RECRUITMENT AND RETENTION

There are no mandatory qualifications required to work as a hairdresser in the UK, though many complete National Vocational Qualifications (NVQs), by studying at a college or further education, or through work-based training as an apprentice to a salon. Training providers vary, and some salons offer their own private training courses. Further training in the form of a Higher National Certificate or Diploma (HNC/HND), foundation degree, and higher degree level is also available.⁸

However, training standards are felt to be inconsistent and sometimes unsatisfactory in terms of technical and softer skills. Some employers say that they have had to either retrain or let go of apprentices and recently qualified hairdressers. On the other hand, trainees describe feeling ill-equipped for the reality of working in a salon (more on this in <u>Section 5</u>). In addition, financial pressures mean that salons are taking on fewer apprentices than they used to – more than half (53%) of salon owners say they have reduced the number of apprentices they train in their salons.

"When I first started working in salans we used to have loads of applications coming in all the time, people were dropping off CVs constantly and there were never any jobs because they had so many stylists. And now we're lucky if we can find somebody who wants to be employed." SALON-EMPLOYED HAIRDRESSER. ENGLAND

Recruitment and retention of experienced staff has also become increasingly challenging. In part because fewer people are looking for employment, preferring to be selfemployed. In response, many salon owners are reported to have started to rent out chairs instead of taking on employees they assume will leave anyway.

In addition, there is a challenge in overcoming perceptions of the salon as a difficult workplace. Older hairdressers assume younger generations see it as an unappealing minimum wage career that requires hard work – younger hairdressers meanwhile often feel stuck doing apprentice jobs and put off by workplace hierarchies.

CHALLENGE: INDUSTRY REPUTATION AND REGULATION

The British hairdressing industry is still seen as world-leading but there is widespread concern that falling standards and devaluation of skills is contributing to a decline in status. Currently, the UK hairdressing industry is unregulated, with no licensing requirements beyond adhering to health and safety at work legislation, public health legislation, and consumer protection legislation. As covered above, however, there are no minimum standards or qualifications required to operate a hairdressing business. Though a state register exists, which is managed by the Hair & Barber Council and requires evidence of training, this is entirely voluntary, and only 10% of hairdressers and barbers are estimated to be currently registered.⁹

Nevertheless, later career hair professionals who have witnessed the trajectory of the industry note its worldleading reputation over the decades, and the status enjoyed by British hairdressing across the globe. But there is a sense that it is recently failing to maintain the high levels of technical skill and innovation it was once known for. Some point to other countries (e.g. Australia) which they feel are now competing with British hairdressing's reputation. This in turn drives worry that British hairdressing will no longer be as valued — or attractive as it once was.

"There don't seem to be any young new dynamic stylists or colourists coming through. When you look at some of the fashion shoots in, perhaps the Sunday papers, it's very ordinary, the colours are very ordinary. I don't hear of any names that are coming through in the way that they used to maybe 10 or 15 years ago."

FREELANCER, RENTING A CHAIR, ENGLAND

There are also concerns about hairdressing being devalued by those not in the industry, with negative perceptions of career prospects, skill levels, earnings and professionalism.

- Some attribute this to a lack of regulated standards within the industry, with college training often feeling unsatisfactory and the quality of apprenticeships varying widely.
- The rise in entirely untrained or self-trained hairdressers and "DIY hairdressing" (and beauty generally) is also seen as a threat to traditional hairdressing's reputation.

Combined, there is a fear that this makes it harder for the industry to attract young people, as well as to ensure fair compensation for stylists' work.

"We could have higher standards. When you're hearing horror stories, [the] damage hairdressers can do not only to hair but scalp. There is a risk attached and I don't think it's respected in that way."

EARLY CAREER HAIRDRESSER, ENGLAND

CHALLENGE: GOVERNMENT SUPPORT

Though not an existential threat, many feel there is insufficient government support for the industry. Perceived unfair tax burdens are felt to contribute to salons' current difficulties.

In particular, many salon owners cite VAT as a challenge faced uniquely by salons that puts them at an unfair disadvantage relative to those who rent chairs and freelance hairdressers (who are often also sole business owners but do not face the same tax burden). Although most hair and beauty businesses have a turnover of less than £100,000 per year¹⁰, the VAT threshold of £90,000 may act as a deterrent to hiring employees and a barrier to growth. Those in devolved nations also note the difference in business rates across nations, with discounts available for salons in England, leading to an uneven playing field.

However, whilst hairdressers cite VAT and the declining popularity of the traditional salon-employed model as a challenge specific to the industry, it is often seen as secondary in overall impact when compared with wider challenges.





Q. Which of the following changes, if any, have you made in response to the challenges you are concerned about? Base: All respondents (n=360)

"It should be a level playing field. We are a VAT liable salon, so prices are 20% higher than anywhere else who rents a chair. On the other hand, we also pay national insurance, employee national insurance, taxes are much higher. Our overheads are much higher than a rent-a-chair salon."

SALON OWNER, WALES

CHALLENGE: PRESSURE TO USE SOCIAL MEDIA

True success is now seen to hinge on the ability to selfpromote online. While hairdressers feel they will always rely on word of mouth to some extent, it may no longer be enough to stand apart from the crowd.

The hairdressers and content creators that participants say they admire showcase their skills online in a captivating way – e.g. transformation videos, impressive before-andafter photos – but also show personality. This puts pressure on "normal" hairdressers to emulate influencers and those who spend much of their time on social media, which is an unrealistic expectation for most. Many do not feel confident in building a personal brand, with some older hairdressers saying they will not try, and younger hairdressers saying they will do it "later", i.e. once they feel more established and secure. As a result, many use social media half-heartedly and without a strategy. Others say they have sought social media training or advice to help them be more competitive in this area, and there are more and more experienced salon owners offering training (see case studies).

"There is a reluctance to take an technology in the business. Not so much the younger generation, but 40 and up. Salan owners as well. [They] don't see it as something they need now, as they never needed it before. But [they] complain about recruitment, no staff joining, people leaving to freelance. One of the answers is using social media properly."

-

SALON OWNER, ENGLAND

"I dan't post my work anline, and I dan't want to rely an social media to graw clientele. I have ather priorities."

FREELANCE HAIRDRESSER, ENGLAND

⁹ House of Commons Library (2022) Regulation of hairdressers

¹⁰ ONS (2021) Count, employment, employees and turnover of VAT based enterprises in SIC07 96020 Hairdressing and other beauty treatment

4. SO WHY BECOME A HAIRDRESSER?



Despite these challenges, hairdressing is still seen as a desirable industry. Hairdressers are most likely to stress that it is a skill for life, which allows them to work anywhere, as well as being creative, social, and flexible.

HAIRDRESSING IS A LIFETIME SKILL

Much like the wider personal care industry, which has a stable and meaningful role in local economies across the country regardless of income level and unemployment¹¹, hairdressing is perceived as a skill that is in universal demand and not at risk of being replaced, including by developments like Al.

In addition, whilst excelling in the industry requires continuous effort and investment, those who have achieved success say that the industry is rewarding, exciting and has given them stability. Later career hairdressers in particular tend to feel secure and confident in their abilities, and proud of how they have developed and used their skills.

"It's a skill no one can take away from you." It gives people confidence, and you can work anywhere. The industry itself is strong, it's always in demand."

APPRENTICE, ENGLAND

HAIRDRESSING IS CREATIVE

Almost all hairdressers enter the industry due to a desire to explore their creativity, and this is consistently the aspect of hairdressing that is seen as most rewarding. Hairdressers value the high levels of autonomy and trust they are given to deliver the service clients want, and the ability to learn new techniques, try new products, and problemsolve within their daily work. Most hairdressers have a real desire to learn and improve, and pride themselves on their technical ability.

• When this potential for creativity is not fully realised for example for those who are salon-employed or more junior - it leads to frustration.

"It's such a lucrative, creative industry, there are so many different avenues and routes you can take, and so much money to be made. The opportunities are endless, exciting, and evolving, and hopefully in 10 years' time the industry gets recognition for those things, and [that it is] also is seen as a decent career and not just a job."

SALON OWNER, ENGLAND



"I still find it so exciting. Creative. So much freedom as well, [you] can go any direction in it. Could go teach social to anyone else."

SALON OWNER, ENGLAND

HAIRDRESSING IS MORE THAN "JUST" HAIR

Alongside creativity, hairdressers value the people-focused nature of the job: they say that interactions with clients are often enjoyable and make hairdressing deeply personal.

These interactions are seen to deliver a benefit that goes beyond the immediate service; it is widely agreed that hairdressing can improve clients' mental health and wellbeing. It does this in two ways:

- Through the confidence given by cutting and styling; and
- Via the conversation and emotional support hairdressers often provide in an appointment and which many see as a central part of their role.

"I would call myself an old biddy hairdresser, so I trained donkey years ago, gave up doing it, and then just got back into helping neighbours with their hair. And then more and more people said, 'oh, could you look after this one?' And 'could you do this one?' It's a bit of a labour of love, I'd say almost a community service rather than a business."

MOBILE FREELANCER, SCOTLAND

However, this aspect of hairdressing can be challenging. Listening and responding to their clients' problems and concerns can be emotionally draining, and hairdressers themselves may not have the tools or support available to look after themselves as well as their clients. Ultimately. however, this downside does not outweigh the positives benefits of the hairdresser-client relationship.

"I enjoy what I do, we make people feel good. There's something really nice about that. We're fortunate to make people feel better and that makes me feel better."

FREELANCER, ENGLAND

HAIRDRESSING IS FLEXIBLE

Hairdressing can offer flexibility and the ability to set hours or work around other responsibilities. In line with the hair and beauty industry as a whole¹², hairdressing is a female-dominated sector that exhibits higher levels of selfemployment and part-time work than the wider economy. Most hairdressers feel they are able to make their career work for them and have the freedom to set their own hours through reliable freelance work if they need it. This is especially valued by those with caring responsibilities, and many later career hairdressers and salon owners who have built up experience and a reliable client-base feel they are easily able to work in a way and at times that work for them. Although those who are salon-employed are less likely to feel that their time is their own, they are generally still able to take the time they need to pursue training opportunities or to attend to other responsibilities. In line with the general confidence that hairdressing "will always be needed", hairdressers find that there is demand for their services at all hours, meaning they will be able to fit appointments in as is convenient. Although this can mean working unsociable hours such as evenings or weekends, especially for self-employed hairdressers (see Section 3), it contributes to a sense that working in the industry does not mean a strict "9 to 5" and can accommodate different lifestyles and responsibilities.

"We've become far more flexible for our staff that have been working for us for a long time already. If somebody's daughter has a sports day, and it falls in the middle of the day they come in for a couple of hours, they go to the sports day, and they come back again. So, it's almost like moving with them and their needs, and being flexible with that. If somebody doesn't have a booking in the last hour of the day, [that's] fine. You know you don't have to stick around, and I think that helps a lot."

SALON OWNER, WALES

HAIRDRESSING IS MERITOCRATIC

Hairdressers across the industry feel strongly that the time and effort invested in developing technical and business skills pays off, and that the industry as a whole is open to people from all walks of life. Hairdressers who have achieved success report being supported within the industry to do this, and there is a common agreement that you are able to make your own success, regardless of the path you choose. Though broadly the need for traditional training and "working up the ranks" is seen as crucial, hairdressing is seen as accessible, having a low bar for entry, and offering valuable and easily leveraged development opportunities. The ability to self-brand and promote through social media platforms in particular has expanded opportunities, especially for self-employed stylists, even as it has presented new barriers to contend with.

"We have regular days and sessions on how to utilise products. Small-scale training, not qualification training. There is opportunity. The salon is really great, supporting you to push yourself in your career."

EARLY CAREER HAIRDRESSER, ENGLAND

"If you are good at what you do you will be recommended by clients. People who have to rely on social media promote themselves, I think they clearly don't have good clientele if they have to promote themselves."

FREELANCE HAIRDRESSER, ENGLAND

5. HOW ARE HAIRDRESSERS WORKING IN THE **INDUSTRY TODAY?**

THE RISE OF SELF-EMPLOYMENT

More than half of all hairdressers now are selfemployed¹³, either renting chairs, working at home or as mobile hairdressers, or a combination of these. While this is largely by choice - self-employment is seen to offer greater flexibility and earning potential - it can lead to a number of issues. Both the British Beauty Council and the National Hair and Beauty Federation (NHBF) have warned of the risks of salon owners and contractors falling foul of HMRC's rules on "disguised employment"¹⁴. While this has been less front of mind for the salon owners and self-employed hairdressers in our research, it is an issue that was stressed by the more senior stakeholders we spoke to. Hairdressers in this research meanwhile feel that increased proportions of people in self-employment can lead to a decline in skills and quality of training and education. Unsurprisingly, however, those who are self-employed are more likely to stress the benefits freelancing offers over traditional salon employment:

More than half of all hairdressers now are self-employed¹³, either renting chairs, working at home or as mobile hairdressers, or a combination of these.

Flexibility: The biggest advantage is seen to be greater to better balance their professional and personal lives. While some salons offer flexible working arrangements, patterns have become increasingly unappealing to many altered working preferences across various industries including the hairdressing industry. Furthermore, for those with children, the rising costs of childcare have

Earnings: Average hairdresser salaries are estimated to range from £19,000 to £30,000¹⁵. Many of the hairdressers in our sample reported minimum wage earnings while employed at salons. As a result, they noted the potential for improved earnings through freelance work, as they can directly set their prices and retain a larger portion of their earnings. There is much less information available about what a freelance hairdresser may earn. Those in our sample who have taken the leap say that realising a higher earning potential can take time but is ultimately worth it.

Autonomy and creativity: Being self-employed

Many self-employed hairdressers engage in a mix of renting a chair or contracting at a salon and mobile hairdressing.

¹³ Oxford Economics for British Beauty Council (2023) The Value of Beauty 14 British Beauty Council (2023) "Salons urged to educate themselves on employment status guidelines following crackdown on disguised employment

¹⁵ National Careers Service

Renting a chair

Renting a chair is viewed by many professionals in the industry as the "best of both worlds". The model is seen to offer several advantages that combine elements of both salon employment and freelancing:

- Rent-a-chair hairdressers have access to the equipment and professional atmosphere of a salon.
- Anecdotally, hairdressers we interviewed who rent a chair claim to typically retain a larger portion of their earnings compared with standard salon employees. They do this whilst often also having the flexibility to set their own working hours, allowing a level of freedom similar to that enjoyed by mobile freelancers.
- Some salons may also offer guidelines and training programmes to their chair-renting hairdressers so they can continually develop their expertise.

Meanwhile for salon owners, renting out their chairs may also be more profitable than employing stylists because it reduces their liability for national insurance contributions, as well as VAT.

However, industry stakeholders tell us that the model can lead to disguised employment or "false self-employment", with some hairdressers working as de facto employees - e.g. working hours set by the salon, or giving most of their earnings to the salon - without being entitled to sickness, holiday, or redundancy pay. These stakeholders feel that there is a risk of blurred lines between those who rent a chair and those who are employed. While recruiting participants for this project, there was sometimes confusion over whether a potential participant was technically employed or not. For example, they may feel that they are working for a salon, while also working "for themselves".

Mobile and home-based hairdressers

Mobile hairdressers, who travel to their clients' locations to provide services, and those operating from home tell us they experience more professional freedom than most of their industry counterparts.

Mobile hairdressers identify an additional benefit to their way they work: the ability to travel for work which is seen as allowing them to experience variety in their work environments, interact with a diverse range of clients in different settings, and avoid the potential monotony of working in a fixed location.

However, there is an inherent security risk in visiting unknown premises, strangers' homes, or having strangers come to your own home. This threat can feel particularly acute for female hairdressers visiting male clients' homes and not everybody is comfortable doing this.

There are a number of shared challenges among those

Around-the-clock availability: The most common complaint amongst freelancers is that they feel the pressure to be available at all times. This goes beyond the pressure to be available for appointments: as digital of the day. Self-employed hairdressers are aware that feels important if they are to remain competitive and communication can be at odds with self-employed hairdressers' own desire for work-life balance and can to set hard boundaries on when they will respond to

Competition: Freelancers feel particularly vulnerable to competition. The ease of certification by unaccredited the value of more experienced professionals and adds

Isolation: While offering great levels of autonomy,

Despite the overall reduction in the number of traditional salons, salon ownership remains a desirable career goal for many; both salon-employed and self-employed hairdressers say that salon ownership is still "the dream".

SALON OWNERSHIP

Despite the overall reduction in the number of traditional salons, salon ownership remains a desirable career goal for many; both salon-employed and self-employed hairdressers say that salon ownership is still "the dream". This is because it offers independence and allows hairdressers to work for themselves, while also representing business success and recognition in the industry. However, many do not feel prepared for salon ownership financially, or lack the business skills and know-how to access funding and set up a new business, which is not covered in typical education and training.

"In Tech¹⁶ you're just taught hair, you're not taught anything about the business side." EARLY CAREER HAIRDRESSER, ENGLAND

Salon owners themselves are largely satisfied with how their career has gone so far, though they are more likely to be on the sharp end of the wider challenges outlined in Section 3, such as rising overheads, customer retention, and the need to compete online. Indeed, in the face of these challenges, a quarter (25%) say they have considered closing down or downsizing, and 18% say they have done so.

CONFIDENCE IN RUNNING A SALON (SALON OWNERS ONLY) SHOWING % SELECTING EACH RANGE OF OPTION



16 Training in technical hairdressing skills, usually working towards an NVQ.

Business ownership also comes with a range of its own challenges, which not all salon owners feel equipped to meet. Many business skills are picked up on the job and the many challenges of running a small business in competition with larger franchises can make it feel like they are being set up for failure. Some successful salon owners credit luck and the 'right timing' to their success, for example, if they have been able to take over someone else's business, rather than starting from scratch.

"I tend to get an and do my own thing. I don't take on anybody else. Beforehand, I could have had enough to have other people in, to share the business. But the way things are today, there's nothing to share."

SALON OWNER, ENGLAND

"There's nowhere to help little businesses. You have to become 'businesspeople', but you're a hairdresser. There's nothing unless you're protected under a franchise."

SALON OWNER, ENGLAND

Nearly nine in ten (87%) business owners say they are confident with managing their salon's finances, despite the rising overheads and adverse economic climate. This may be because many of these salon owners have been running their businesses for a long time – the majority (54%) of salon owners in our sample opened their salon more than ten years ago and a third (32%) more than twenty. However, there are some who do not feel so confident themselves, but instead rely on a business partner to take on more of those responsibilities.

Confidence levels drop when it comes to hiring and training apprentices. There is a perception of the industry being much more in flux, with salon owners reporting difficulties hiring people who will stay. With just over half (51%) of salon owners feeling confident in hiring and training experienced hairdressers, it also makes them think twice before making the investment to train someone up who may then leave (often to become self-employed). However, not all salon owners feel confident that they understand the rules around hiring contractors or renting out chairs, without falling foul of HMRC's rules on disguised employment.

Only a minority (of hairdressers) (44%) say they feel confident accessing business support, often relying on more informal support, such as through word of mouth or a simple Google search when they have a specific question. In addition, only a minority (44%) say they feel confident accessing business support, often relying on more informal support, such as through word of mouth or a simple Google search when they have a specific question.

Very few salon owners we spoke to are thinking about expanding their business or would know how to go about doing so. Among survey respondents, a fifth (21%) of salon owners feel confident that they would be able to grow their business by opening more premises.

WORKING IN SALONS

Despite the rise in self-employment, salons are where hairdressers claim to get their first "real" experience with hairdressing and clients.

A vast majority (89%) of hairdressers surveyed agree that working for a salon is an essential experience for hairdressers just starting out, as it not only helps them to gain the technical skills but also softer skills like timemanagement, social skills and flexibility.



Q. On a scale of 1–10, to what extent do you agree or disagree with the following. Base: All respondents (n=360)

Many of those who are employed by salons feel that the security of doing so outweighs the potential advantages of self-employment. These professionals prefer not having to take on the burden of business management, including client management, marketing, and finances. This allows them to concentrate on the aspects of their job they find most fulfilling, for example, expressing their creativity through hairstyling and engaging in interactions with clients.

Salon-based hairdressers also value the working environment and see salons as a way of continuously learning. Here, they can observe and learn from colleagues, stay updated on styling techniques, and gain exposure to new products and tools in the industry. There is also the sense of community and shared purpose among staff members.

"In my salan, which still exists, there are still people who work in the salan who trained there, who have been there 20 years – some people love being employed."

SALON OWNER, ENGLAND

That said, experiences of being employed vary from salon to salon. Most hairdressers we have spoken to have had at least some negative experiences of working for a salon – usually related to low or unfair pay, demanding hours, and "toxic" work environments created by either salon owners or co-workers.

Wages are also a concern. The average full-time hairdresser salary is estimated at £19,000-£30,000¹⁷, and those we spoke to expressed that experienced hairdressers may be on minimum wage, with little prospect of progression, especially working in a small salon.

"You only get the minimum wage even though you have skills. You [have] worked really hard, and you [have] worked so many years, you are 10 years in [the hairdressing industry]. In any other job you should have progression. But in this industry people don't think that." SALON-EMPLOYED HAIRDRESSER. ENGLAND

When job hunting, those looking for employment have found it increasingly difficult to find salons willing to take on employees, with many owners now preferring to rent out chairs.

"I couldn't find a salon when I worked in the city [Lincoln]. Most people don't want to employ me or employ people who are over 25, because they're being paid the full amount [of minimum wage]. They just would rather have a selfemployed one, you know, renting a chair there."

SALON-EMPLOYED HAIRDRESSER, ENGLAND

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6. SPOTLIGHT ON TRAINING AND EDUCATION

Technical training is seen as inconsistent across the industry, mostly due to the lack of standardisation or statutory training requirements, as outlined in <u>Section 3</u> (Challenge: Training, recruitment and retention). Salon owners and trainers note that the numerous pathways into the industry – college programmes, apprenticeships, and short courses – result in varied skill levels and insufficient hands-on experience. For many salons, it is normal to re-train newly qualified hairdressers, in part to ensure consistency, in part because some young people's skills are

"Assistants should be protected at first until they have all of the skills, so I avoid putting them straight on the salon floor. Their confidence must grow. A qualification doesn't mean everything. Stylists very rarely come out of college and then can go sit on the salon floor; they need a year of retraining."

patchy depending on the education they received.

SALON OWNER, ENGLAND

More than technical skills, however, it is business and soft skills that many have identified as a growing issue.

Salon owners report apprentices and junior stylists struggling with client interactions, from introductions to understanding how they want their hair styled, to dealing with more challenging situations such as bad feedback. Additionally, salon owners highlight the lack of training in essential areas like marketing, operations, and financial management within formal curricula to set people up with the skills needed for the industry.

"We believe that the quality of training in the colleges is not commercial enough so that they can immediately start building a column. We're lucky enough that we can actually do the training and from there hope that they stay with us as an employee and, if not, make sure that they have the right tools to become really good stylists of their own, wherever they go."

SALON OWNER, ENGLAND

Not all salon owners and employed hairdressers feel confident supporting apprentices in a salon environment.

Salon owners are not necessarily born educators, and while they may have experience at imparting their technical skills related to cut, colour and styling, they can struggle when it comes to the softer skills. This may be, in part, because they feel many of these issues are new, and specific to the current generation of young people. People management is generally not something owners and employed hairdressers themselves have been trained to do. Additionally, salon owners, particularly new ones, may struggle with the financial and logistical demands of providing comprehensive in-house training, making it even harder to effectively support and develop early-career hairdressers.

Newcomers themselves often feel underprepared and ill-equipped for the realities of working in a salon. While they mostly enjoy and feel confident in the more creative and technical aspect of hairdressing, younger apprentices find it difficult to engage with clients.

CONFIDENCE IN SUPPORTING APPRENTICES AT MY SALON



Q. Thinking about your work overall, how confident, if at all, do you feel about each of the following? Base: Salon-based hairdressers and owners only (n=220)

EXPERIENCES OF TRAINING AND EDUCATION AMONG DIFFERENT GROUPS

Apprentices and college student hairdressers

"It's going ok, but I wasn't expecting the difference between theory and practice – there are consequences for messing up. (I) need to get the confidence."

Apprentice, England

Early-career hairdressers

"I needed additional training especially with confidence as well, even learning how to speak to people. Because a lot of it is on a dolls head, so [I] haven't experienced the conversational side [in education]."

> Early-career hairdresser, Northern Ireland

Freelancers

"Big companies might have training facilities available. Renting a chair is great but it's easy to not keep up with some of the latest [techniques]. It's great being in a salon to bounce off of [other hairdressers]."

Rent-a-chair hairdresser, England

Salon owners

"It is a bit of a sign of the new generation. We really have to teach them soft skills. They've missed so many face-to-face communication skills, it's like pulling teeth getting them to introduce themselves to a client."

Salon owner, Wales

- Those currently in training can face significant gaps between the theory taught in college and the practical realities of working in a salon.
- They often feel under-prepared for the interpersonal aspects of the job, struggling with client management and communication – especially with more demanding clients.
- In addition, they report struggling to balance college studies and salon work, often skipping college or training to focus on salon work.
- Those who have just started out can feel ill-equipped for an evolving industry and complain of an outdated and limited curriculum – such as lacking training on men's hair or Afro/textured hair.
- They also note that there can be a significant gap in ongoing learning within their salons, particularly where it comes to crucial education on marketing, operations and financial management.
- Most significantly, they report great variability in the support and opportunities offered in salons. They say that a lack of support within these environments can undermine confidence and career satisfaction early on.
- Both mobile and salon-based freelancers can face significant barriers to further training, including financial.
- For those not based in salons, a lack of structured support leads to lower motivation to pursue additional qualifications, as it requires taking time off work, directly impacting their income.
- In addition, they are often concerned about the quality of available training.
- Almost all salon owners provide in-house training, sometimes going so far as to re-train junior stylists "from scratch" – to maintain salon standards, but also often feel they have no choice, especially where soft skills are concerned.
- Salon owners express frustration over the younger generation's communication skills and their work ethic. Many feel that their younger employees are less willing to put in the work or the hours - which they compare to their own "gruelling" apprenticeship days.

In response to reduced demand for formal, paid-for education, education providers have reduced the courses and opportunities on offer. Despite these relatively negative views of 'formal' training, those who are more optimistic feel that the internet has made it easier than ever to access training content, often for free. Experienced professionals note a reduction in training via manufacturers, while at the same time continuing to find inspiration and expand their knowledge through peer learning. Collaborating with colleagues, sharing tips, and learning from others in the industry helps them to stay current and motivated. For freelancers, resources such as social media, online tutorials, and trade publications are invaluable for keeping up with trends and mastering new techniques. This means that, while there are concerns about skills, access to training – though often informal – has never been easier.

However, the increased availability of free training online, particularly via social media, has led to a decrease in uptake of paid-for education – particularly as hairdressers look to maintain their profit margins in the face of the challenges outlined earlier. Notably, despite training in some of the areas outlined in <u>Section 7</u> being available (notably business and social media education), according to industry experts, hairdressers are significantly less willing to spend money accessing it. Some industry stakeholders say that, in response to reduced demand for formal, paid-for education, education providers have reduced the courses and opportunities on offer.

NATASHA GROSSMAN CEO, HOB SALONS

"If we pull together as an industry and get the support that we need from the Government we can come out and be the best we've ever been. It's one of the industries you cannot get online. Everyone needs their hair cut. It's a vocation you can do after children, anywhere in the world. I know we're going to absolutely smash it, but I want to do that with the industry collectively. I want people's opportunities to be as equal to other industries."

HOB salons and Natasha's story

Founded in 1983 by Paul Simbler and Clive Collins, HOB is a multi-award-winning salon group with 17 salons and two academies across North London and Hertfordshire.

In February 2024, Natasha Grossman became HOB's CEO. Natasha feels her journey is a testament to the company's strong commitment to internal development; she started at HOB at 18 and gradually worked her way up.

Natasha recognises significant challenges in the hairdressing industry, including high VAT rates, work-life balance issues, and recruitment difficulties. In response to a perceived shift in the calibre of apprentices entering the industry, where social media is felt to have impacted young people's social skills and schools seem to be falling short in preparing them for the working world, HOB has taken matters into its own hands by offering in-house training for over 10 years. Natasha believes HOB's robust apprenticeship program has offered a solution to these challenges, and in 2023 HOB won the SME Apprenticeship



Employer of the Year award at the Annual Apprenticeship Conference, and Education Salon of the Year at the Salon Business Awards.

What sets HOB salons apart as a training institution?

Natasha attributes HOB's success to a deep understanding of salon operations and the impact that well-trained apprentices can have on a business. HOB integrates reallife salon experiences and business consequences into their training to ensure that apprentices are prepared for the realities of the industry.

HOB also emphasises developing apprentices' communication skills—teaching them how to talk to clients, introduce themselves, and present themselves professionally. Recognising that young people today often struggle with soft skills, HOB also focuses on practical life skills, such as making the perfect cup of tea or sweeping the floor efficiently. These foundational skills, though simple, are essential in shaping a well-rounded professional.

7. LOOKING AHEAD: HOW TO SUCCEED IN A CHANGING INDUSTRY

HOW OPTIMISTIC OR PESSIMISTIC DO YOU FEEL ABOUT THE FUTURE OF EACH OF THE FOLLOWING, OVER THE NEXT 5 YEARS?

SHOWING % SELECTING EACH OPTION



Q. On a scale of 1-10, how optimistic or pessimistic do you feel about the future of each of the following, over the next 5 years? Base: All respondents (n=360)

*Answer option shown to salon-based hairdressers/salon owners only (n=221)

Despite the considerable challenges facing the industry, the hairdressers in this research largely feel confident **about their future.** Almost three quarters (71%) of survey respondents say they feel confident in their own career in the hair industry, even though they feel less confident in the hair industry in their local area (63%) and the UK overall (61%).

Although most hairdressers tell us they are experiencing financial challenges, there is an underlying belief in the longevity of the industry and a sense that things will get better again. For example, hairdressers are much less likely to feel anxiety related to automation, which they assume is more likely to affect other industries.

"I have not seen anything related to AI in hair, and I don't think I'm worried. We are an industry that can't be done by computers or robots. I say that through gritted teeth though. Hopefully we will still be here." SALON OWNER, ENGLAND

Those who are at the beginning of their careers still feel that they are entering a dynamic and thriving industry, while those with more established careers claim that they have seen the industry shift through various economic and social changes throughout the years, and say that there is no reason why it should not do the same now. There is confidence that services and ways of working will continue to supplement old ones through creativity and outside-thebox thinking.



"I think it's doing great. It's an established trade, it will go an forever. Most people want their hair cut. It's forever evolving. There's always a new service."

COLLEGE STUDENT, ENGLAND

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IN AN IDEAL WORLD, HOW WOULD YOU LIKE TO WORK? SHOWING % SELECTING EACH OPTION



Q. In an ideal world, how would you prefer to work as a hairdresser? Base: All respondents (n=360)

HOW WOULD HAIRDRESSERS LIKE TO WORK IN FUTURE?

We asked hairdressers in interviews and focus groups how they would ideally like to work, if there were no obstacles. As noted in Section 5 salon ownership is still the dream for many. This is reflected in the survey, where 3 in 10 (30%) say that is how they would ideally like to work. (We would note the high proportion (54%) of salon owners in our sample, who are already living this dream).

Interestingly, a fifth of respondents (19%) say they would like to work in a combination of roles and settings, further highlighting hairdressers' desire to work flexibly and explore different options.

In order to help hairdressers achieve their goals and thrive in this changing industry, a range of opportunities have been identified through this research and are outlined below.

OPPORTUNITY: BUSINESS PARTNERSHIP AND MENTORSHIP

Some of the most successful businesses in hairdressing are based on a symbiotic partnership, where one partner brings the creativity and the other the business know-how. There may be an opportunity to facilitate this skills exchange more formally, allowing creative hairdressers to find a genuine business partner or mentor, not just an investor.

- There are many hairdressers who simply do not see themselves as naturals when it comes to business administration, or who would rather focus on the creative aspects of their role. For these hairdressers, a business partner may be the answer: someone who takes care of the books, but also has an eye for growth and marketing. At the moment, however, the options for finding someone to go into business with are seen as relatively limited - and not everybody wants to go into business with friends or family.
- On the other hand, some hairdressers feel confident they could run their own business but are unsure where they would go for advice on how to get started, or on specific challenges related to ownership. (They would not feel confident asking their employer or other salon owners who may not welcome the competition). For these hairdressers, being able to access mentorship from more experienced hairdressers in the industry and having a clear place to go for advice or information would help them feel supported in taking the next step to salon ownership.

A business partner may be the answer: someone who takes care of the books, but also has an eye for growth and marketing. "I think mentoring would help. I've absolutely got a great team [at my salan], but sometimes limited in terms of what you can talk about in terms of personal growth. I can't go to my boss and say I want to open up company against you, I would be told 'there's the door'. Mentoring in the industry would be a good thing."

EARLY CAREER HAIRDRESSER, ENGLAND

Having a clear place to go for advice or information would help hairdressers feel supported in taking the next step to salon ownership.



"Partnership is really important. I do one part of the service, and my business partner does the other. It's at heart of what we do so we started to encourage it among our team. This keeps it more creative, stimulating and engaging for the team and our clients. Clients like that, having an input from two sets of eyes, it makes it more exciting. Partnership helped us both through so much. I could not have done this alone. It's unreasonable to expect a creative person to know how to do everything. We had mentoring when we started and that's what Ben is passionate about now, more of the business side."

Massarella and Jones and Jordan's story

Jordan and his co-founder Ben set up Massarella and Jones mid-pandemic after having gained years of experience in the industry and developing a loyal client base together. Merging Jordan's expertise in colouring and Ben's expertise in styling allowed for an easy transition from their previous salon to their new business. After launching their business with personal funds on April 12th 2021, they guickly expanded from a two-man show into a team of ten at their new salon location, which opened in 2022. They are winners of the L'Oréal Colour Trophy Afro Award 2017 and have been awarded the Creative Head Magazine 'IT List' Award.

Key challenges and working in partnership

Budget was a challenge initially, and the two had to put together personal funds to get the business going. With Jordan wearing the creative hat, and Ben stronger on the business side of things, they were able to fall into their roles quite naturally. Jordan claims that without a partner it would have been very difficult to start a business at all. After lots of sacrifice and multi-tasking, they were able to naturally grow their business and hire more staff. They try to keep this sense of partnership and co-working at the heart of their business, with hairdressers working together across clients, keeping the environment stimulating, creative, and engaging.

Changes to the business in the future

Jordan sees the industry as something that is always evolving, and that is across everything - arts, media, personal identity, inclusivity, and exclusivity. For Jordan, there are endless opportunities in hairdressing, and people need to think outside of the box and come together for the industry to evolve. Starting out, Massarella and Jones partnered with a local florist to sell arrangements in their salon, which not only saved them money on décor but also brought them closer to other local creatives. They hope to do more of this in the future, whether it is acting as a gallery space for local artists or a shop for local sellers. Jordan also owns a tattoo parlour in town which he hopes to incorporate in the salon in some way. Jordan sees this as a way to keep clients invested in the brand and strengthen their post-pandemic sense of authenticity, which he credits for their success.

OPPORTUNITY: BUSINESS SKILLS TRAINING

Salon ownership and self-employment are seen as the most desirable ways of working. However, hairdressers do not necessarily have the skills to succeed. There is a need to provide training on the business, finance and marketing aspects of hairdressing. This should be tailored to all levels - from apprentices to salon owners. Success would help to send a message that hairdressing is more than "just" hair, and could help to reduce the number of salon closures.

- Currently, there is a perception that these business skills are left out of formal education and are usually only picked up later – at which point the training provided depends on how supportive and transparent the salon environment is. There is a perception that some salon owners "gatekeep" these types of skills in order to avoid their staff leaving to set up their own business, potentially taking clients with them.
- Training should also help to address a further barrier to skills development: a self-perception amongst many hairdressers that they are not "numbers people".

"All these things are such a skill, it's not something that you're taught. We are expected to be everything. Hairdresser, business people, therapist, influencers, media managers. We wear so many different caps which is a challenge for a lot of people. People are used to doing things a certain way but now you must adapt."

SALON OWNER, ENGLAND

"There's a lack of education for the business owners and the self-employed. So it's definitely more the skill sets around hairdressing that I see as an issue, because we need them more than ever. We used to get away with just being a really good hairdresser, and we can't get away with that now."

SALON OWNER, ENGLAND

Training should also help to address a further barrier to skills development: a selfperception amongst many hairdressers that they are not "numbers people".

COLIN McANDREW MANAGING DIRECTOR, MEDUSA HAIR

"I try to open eyes to best practice, what to measure and who to measure against. Then you fix any immediate problems that are really damaging the business. You fix that as quickly as you can, then start thinking about what's next, can we increase turnover by £50,000? What do we need to do that? Is it recruitment, advertisement?"

Medusa and Colin's story

Established 30 years ago, Medusa currently operates six salons in and around the city of Edinburgh, employing about 80 team members. Managing Director, Colin, started off as an employee of Medusa, before rising to Partner and finally buying the company 16 years ago, running it with a team of managers and business managers. Feeling that many salons are "winging it" and would value access to straightforward business know-how and advice, Colin launched his mentoring programme for salon owners to pass on best practice. Colin aims to provide honest business mentorship to other salon owners, focusing on tried-and-tested techniques based on his own experiences and mistakes.

Key strategies implemented in Medusa to achieve its rapid growth

Colin credits the success of Medusa and its staff retention to its focus on education, delivering a year-long training system for newcomers that is bespoke to each colleague and focuses on giving them as much support as they need to achieve their goals. To track the success of their



training and the performance of team members, Medusa looks at booking frequency at an individual level as well as at the experience level, rewarding high performance with commissions and team-building activities like trips abroad. Consistent open communication at all levels within the team ensures everyone is on the same page and working towards the same goal.

Advice for other salon owners looking to achieve Medusa's growth

Medusa emphasises the importance of making sure all team members are highly skilled and have the internal and external training needed to thrive in their career - whether at Medusa or elsewhere. The group takes a "branchising" approach – giving salon managers autonomy over their branch without losing connection to the Medusa leadership – to reduce talent drain, offering salon business partnerships for exceptional team members. The hope is that this encourages staff to develop, as they know they will be rewarded for high performance and are personally committed to the success of the brand.

OPPORTUNITY:

TECHNICAL SKILLS TRAINING

Both early and mid-career hairdressers agree that there needs to be more accessible ways to upskill that encompass the multi-faceted nature of their work. This creates an opportunity for salons to introduce more diverse forms of training. Successfully doing so will once again place salons at the core of a healthy, thriving industry that will attract new entrants.

• As the industry responds to trends and social trends, the technical skills and hairdressers need evolve. Regularly refining technical skills can allow all professionals to feel part of a changing industry and give them the confidence to lean into the creative aspects of hairdressing and boost their careers. However, currently, some say that they struggle to find the time to update their skills, especially if they need to look externally for training because they are self-employed, or because the salon which employs them does not offer regular support and training.

"I'm not particularly concerned about the future. You have to keep updating your skills as a hairdresser, learning new styles and techniques... I would agree that people visit less frequently. But then its swings and roundabouts, some will do it themselves and mess it up, and have to come to you and correct it."

MOBILE HAIRDRESSER, ENGLAND

"I try and keep up with things, and so keep going on [the product manufacturer] website where I can actually keep up my skills and learn new things. [Like] what's new in the in the colour range, or what's new in the industry, how people are trying to elevate [their] skills with cutting or styling, generally like that. So I try and keep myself in education as much as I can."

SALON-EMPLOYED HAIRDRESSER

• There is general agreement that there needs to be more training on techniques for curly and textured hair. Currently, there is a perception that expertise in this space remains in the hands of a small number of hairdressers and salons, meaning that many hairdressers feel unable to serve certain clients.

> Regularly refining technical skills can allow all professionals to feel part of a changing industry and give them the confidence to lean into the creative aspects of hairdressing and boost their careers.



ERICA LIBURD OWNER AND FOUNDER OF THE MUSE SALON

"[It's important to] work both ways. You have black hairstylists that work with black clients. You can work both ways in terms of what you choose to do in your salon. The difference is at the point of education, where we both learn on Caucasian hair types. There's a disparity there. We learned the same thing in colleges until I went off and did the extra. One of the successes for me was I am able to do anybody's hair that walked through the door."

Erica's story

Erica started hairdressing at 17 when she enrolled in college. Disappointed that the curriculum did not include curly or textured hair, Erica attended a one-year course on textured hair in Birmingham, before returning to Northampton. From there on she decided to make inclusivity the focus of her career. Erica is a qualified hairdressing assessor and educator, having created the Texture Unravelled course, allowing hairstylists. colleges, academies, and salon educators to expand their knowledge and skills with textured hair. She owns MUSE, in Northampton. Erica prides herself on not only championing inclusivity in her training, but on creating the MUSE curl cut - specifically designed for curly hair - and for having cultural competence and respect for all clients with different hair traditions (including hijab wearers and different Black hairstyles including braids and locks). She believes that the industry must expand on inclusivity at all levels and be more vocal publicly and through the media.

Inclusivity in the hair industry

Millions of people in the UK have textured or curly hair with very few hair professionals holding the knowledge to have

them as clients. Yet Erica has found that many salons don't find value in textured hair, and don't train their employees on it. In her view, hairdressers often make excuses without understanding the issue - scared of what they are unfamiliar with, lacking cultural competency, and fearing cancel culture. She thinks that it is a shame that people fall back on the perception that there is not a market for textured hair knowledge in salons, when she knows of people who drive 4-6 hours just to get their hair done.

Moving forward

Erica believes that upskilling starts in college, with the Government and education departments. The knowledge on curly and textured hair must be universal to be passed down, rather than solely in the hands of a few. She believes that salons and hairdressers need to be asking more questions, taking themselves out into the industry to learn and attend workshops. With this knowledge they need to be talking more to their staff, apprentices and peers to build connections and share information. Her passion and purpose are that every salon will at least have one apprentice that has learnt about all hair types, so that the industry can grow with more inclusivity.

OPPORTUNITY: DIGITAL SKILLS

In an increasingly digital world, there is a risk that some hairdressers are being left behind or not making the most of the tools available to them (see chart below). We have seen that, although most are doing the basics, not everybody feels confident using digital tools to support their business and career. Any business training should therefore include the use of these crucial tools.

Although most are doing the basics, not everybody feels confident using digital tools to support their business and career.

- While it may be expected that not many have found ways to include artificial intelligence (AI) or augmented reality (AR) into their jobs, there is a risk that they are not considering how those technologies might be relevant to their business. For each, more than half say they are not confident using them as part of their job. Qualitatively, we have seen that hairdressers tend to view AI as a threat more than an opportunity (and mostly to other industries).
- Perhaps more concerningly, there is also little confidence in building a web presence for their business, whether that's using SEO, which just a third (34%) are confident doing, or building a website (40% confident). We also know that there are many hairdressers who are still using outdated systems for running their business, and just over half (55%) say they are confident using digital tools to support and manage their business – though, positively, at least three quarters (78%) are confident managing cashless payments.

CONFIDENCE IN RUNNING A SALON (SALON OWNERS ONLY) SHOWING % SELECTING EACH RANGE OF OPTION

		78%	10%	10%
Managing cashless payments				
	63%	2	1%	15%
Advertising my work on social media				
	55%	20%		22%
Using digital tools to support and manage my business				
40%	22%			34%
Building and maintaining a website for my salon*				
34%	19%			41%
Using search engine optimisation (SEO) marketing to prom	ote my work/salon			
23% 14%				54%
Using artificial intelligence (AI) as part of my job				
16% 15%				58%
Light augmented reality (AD) as part of my job				

Using augmented reality (AR) as part of my job

NET: confident NET: neutral NET: not confident

Q. Thinking about your work overall, how confident, if at all, do you feel about each of the following? Base: All respondents (n=360) *Answer option shown to salon owners only (n=196)

OPPORTUNITY: SOCIAL MEDIA AND (DIGITAL) MARKETING

Although most say that they are on social media, and use it to promote their work, that does not mean they know how to use it to the greatest effect. While there are existing training courses for hairdressers that specifically focus on social media and (digital) marketing, there is also an opportunity to communicate to hairdressers more broadly that there is not just one way of "doing" social media – and that it is not the only way to succeed. Instead, standing out digitally often means having the self-awareness to identify what sets your business apart and bringing that across authentically in a way that is sustainable.

- Hairdressers tell us of the pressure they feel to do social media right, but often seem to think that this means becoming an influencer (e.g. producing "piece to camera" content). This can be off-putting or intimidating for some, and there is a smaller group of mostly older hairdressers who are not using social media at all and instead rely on their regular clients, word of mouth, and footfall for custom.
- Some salon owners tell us that they have responded to a post-pandemic desire for authenticity, community, and social interaction. These are all things that can be achieved via social media, but they do not have to be.
 Salon owners see real value in connecting with their community in person and getting "out there" instead.

"You want to make yourself the star of your page, so people get to know you a bit better. [There are] hundreds of good hairdressers in everyone's town – you also need to be someone people want to spend time with. Showing people your personality is really, really important."

SALON OWNER, ENGLAND



Standing out digitally often means having the self-awareness to identify what sets your business apart and bringing that across authentically in a way that is sustainable. VIVIENNE JOHNS FOUNDER, THE HAIRDRESSERS SOCIAL CLUB

"I'd tell hairdressers to start with just creating content that's more about them, so not just before and after pictures. You want to make yourself the star of your page so people get to know you a bit better. There are hundreds of good hairdressers in everyone's town, you also need to be someone people want to spend time with. Think of your social media page like a magazine — just hair pictures is boring. But if you share your lifestyle, inspirational story, clients you already have, interiors, food, whatever you like to talk about, it makes it more interesting for you to create content as well."

The Hairdressers Social Club and Vivienne's story Vivienne has worked in the industry for decades and opened her first salon aged 25. It was only in 2019 that she really started to use social media, building her social media brand and marketing during the pandemic, and quickly found success, with her salon growing alongside her personal brand.

The Hairdressers Social Club was created to teach other salon owners how to create content and promote their salon. By leveraging the free marketing opportunity, Vivienne feels salon owners can tackle other challenges too, including recruitment and retention. She presents herself as evidence that success via social media is still possible, even for late adopters or later career hairdressers who might be reluctant to take the plunge.

Social media strategies that led to the dramatic growth of her salon

To start with, Vivienne engaged with other local businesses in her area rather than directly with clients. She made a list of the businesses that her clients followed online. She then dedicated 15 minutes every day to a "virtual flyer drop" engaging with their business, leaving comments, ensuring she was top-of-mind for them as a potential recommendation for clients in the area. After a few months of doing this consistently, her salon went from 17 to 111 new clients every month.

Vivienne's key advice is to optimise business social media profiles for searchability, e.g. by ensuring key words relating to services are in the bio, the salon address or general location is included, and not using imported fonts that are incompatible with the platform. She also encourages hairdressers to keep up to date with platform updates and renew their training – social media can progress rapidly in only a few years, and like the hairdressing industry, is constantly changing.

SOPHIA HILTON FOUNDER, NOT ANOTHER SALON

"For me, social media is not the pinnacle it used to be [...] I think people need to work on more human marketing. Working with their communities, like joint competitions with their local florist. Putting on events as part of a community, getting to know the people within their area like on a personal level. We went very digital for a long time, but I think personal relationships are what hairdressers are fantastic at."

Sophia Hilton's story

Sophia moved to London aged 20. Having trained to be a hairdresser at home in Blackpool, she found working in London to be a steep learning curve, essentially retraining for seven years. Since then, she has opened her own salon, Not Another Salon, has won numerous competitions, and has become one of the biggest selling educators in the industry. Although known for her social media training, Sophia has recently shifted to teach marketing more broadly.

Sophia's approach to marketing

Having noticed the limitations of relying on social media in a highly saturated and competitive market, Sophia now includes other approaches in her training. This includes other online marketing methods including via email or getting involved in mums' groups on WhatsApp or Facebook, but also more "old school" approaches such as in-person networking with other local businesses and getting involved in local events. She recognises that young hairdressers in particular may struggle with this, but that it is important for them to brush up on their inperson skills to maintain what makes hairdressing special.

Sophia feels that not every business's social media account needs to focus on one person's personal brand – and not everybody needs to be an influencer. It's more about each salon and salon owner finding what works for them, without it eating up all of their time.

OPPORTUNITY: PRODUCT AND SERVICE INNOVATION

Product and service innovation are felt to be at the core of a constantly changing industry. Hairdressing is seen as responding well to trends, through product innovation and training, but some feel it could do more to stay ahead of the curve. Whether through formal training or via manufacturers, there is an appetite amongst hairdressers to expand their range, or to focus on something new that will help them stand apart.

- Among our sample, three quarters (74%) say they have successfully expanded their hair services beyond cut and colour, often introducing extensions and various types of maintenance treatments such as conditioning and head massages. More than half (56%) also say they have introduced services for more hair types, reflecting an overall move towards more inclusivity.
- In addition, more than a quarter (27%) say they have introduced other beauty and wellness services. Some salons, for example, have added a nail station, or offer tanning and other personal grooming services, such as lashes, brows, and waxing. Some feel this works well, as clients come in and book another service "while they're there".

 More than half (57%) have responded to the greater demand for environmentally conscious and sustainable products. Central to this is a global demand for more sustainable industries, offering an opportunity for salons to opt for more sustainable practices, whether that be using less water, environmentally safe products, or becoming paperless. Some who have done this successfully say that, because hairdressing is such a personal industry, authenticity and truth in relation to sustainability are important for clients and the success of businesses.

FUTURE OF HAIRDRESSING

- Perhaps a reflection of hairdressers' increasing awareness of their role as informal mental health practitioners, a substantive minority (38%) say they have successfully implemented silent haircuts or other mental health support. Some have offered mental health first aid training to their staff in response to such demanding work, with one salon owner exploring options to offer more wellness services such as yoga classes and meditation.
- Just under a quarter (23%) have also successfully introduced gender-neutral pricing, where prices are set according to the service performed rather than based on client gender. Two in 10 (41%) have started to offer timebased pricing, where clients are charged an hourly rate for services, which can differ depending on stylist skill level but includes all costs within the price.

"One of my stylists is a yaga teacher too so we are looking at ways to bring wellbeing into the business as well. We take a lot of pressure on as hairdressers with all the problems of our clients. We listen to everyone's problems. We did a mental health first aid course after COVID. We don't want to be offering the wrong advice to clients. There should be more things like that in the industry."

SALON OWNER, ENGLAND

HAVE YOU INTRODUCED ANY OF THE FOLLOWING IN THE LAST 5 YEARS? SHOWING % SELECTING EACH OPTION



I have successfully done this I have unsuccessfully tried this I have not tried this

Q. In the last 5 years, have you successfully introduced any of the following into your job/business? Base: All except educators and apprentices (n=303)



"Start small. I reflect every year on what I achieved, what I want to achieve, what I didn't achieve and why not. If you want to incorporate sustainable practices stop sitting on the fence. Patience and perseverance. You need to work on the foundation of the businesses, the values, your mission and vision. When everything else fails, you need to be able to go back to the foundation. You can only build a tower on a strong foundation."

Cognito and Shareefa's story

Shareefa Jennings, with 25 years of experience in the hair care industry, founded Cognito Hair in 2017. Shareefa did not establish her salon with the goal of becoming a 'sustainable' salon. Rather, her business plan was built around creating bespoke hair journeys for her clients. That was until a client noticed the eco-friendly practices already in place in the salon and suggested Shareefa market Cognito Hair accordingly. Now, sustainability is embraced as a "lifestyle and a journey", rather than a checklist of tasks. Shareefa believes in gradual, meaningful change, and being transparent with clients about her practices. She finds that this approach resonates with clients, who appreciate honesty and shared values, making the salons £2 green fee, for example, a non-issue. Shareefa's collaboration with professors at Southampton University to assess and refine practices like foil usage and waste management continue to help her learn and reduce environmental impact. Additionally, Cognito Hair partners with B Corp businesses, such as Green Salon Collective

and Scrummi towels, to enhance sustainability through recycling and using biodegradable products. For Shareefa, sustainability also means giving back to the community, aligning her business with the principles of people, planet, and profit.

How can other salons integrate sustainable practices?

Shareefa's advice for salons looking to integrate sustainability into their work, is to begin with small, manageable steps that align with their core values. Rather than adopting sustainability solely for marketing, salons should focus on building a foundation rooted in their mission, vision, and values. While initial costs may arise, they often balance out as clients are willing to support sustainable initiatives. The sustainability journey requires patience, perseverance, and a commitment to continuously reflect and improve. A strong extended team - like an accountant, marketing manager, and social media manager - helps maintain and grow these practices.



BREE DAVIE CO-CEO, TREVOR SORBIE

"It's just the right thing to do. We never should have had different prices. It's not about gender, it's about the work you're doing."

Bree and Trevor Sorbie's story

The Trevor Sorbie brand, established 45 years ago, has become a cornerstone of the hair industry since opening its first salon in Covent Garden in 1979. Trevor Sorbie himself, who rocketed to fame in the 1970s, is renowned as the first hairdresser to win the prestigious British Hairdresser of the Year award four times and the first to receive an MBE from the Queen. His passion for educating others, particularly in supporting those experiencing medical hair loss, has left a lasting impact on the industry. Today, the brand is led by Co-CEO Bree Davie, who began her journey as a stylist 25 years ago. Having been involved in all aspects of the business, she now oversees the operations of the thriving enterprise, which includes six salons across the UK as well as locations in Dubai and China.

What inspired the innovative non-c

Trevor Sorbie salons have embraced non-gendered pricing to ensure that their services are based solely on the time and expertise required, rather than the client's gender.

This inclusive approach has been practiced at the flagship salon in Covent Garden since 1979 and the Hampstead location from inception. A few years ago, a model and activist conducting research in Hampstead highlighted that Trevor Sorbie was the only non-gendered pricing model. Recognising that non-gendered pricing is central to the Trevor Sorbie ethos, and wanting to set an example for other salons, all Trevor Sorbie salons have transitioned to non-gendered pricing in the last few years.

How does the pricing model work in practice?

Trevor Sorbie's pricing model is based on the principle that clients should be charged for the service and time taken, not their gender. When transitioning to non-gendered pricing, existing clients who were accustomed to the previous mixedgender pricing were offered a 10% discount to ensure they felt valued during the change. New clients were introduced to a single, consistent price. While this shift hasn't necessarily boosted clientele, it also hasn't had a negative impact. The focus is not on profit but on fairness, reflecting the belief that pricing should be about the work being done.

OPPORTUNITY: THE HYBRID SALON

In response to what many see as the irreversible trend of self-employment, more and more hairdressers are advocating for a hybrid model of salon and selfemployment, where hairdressers and owners benefit from the best of both worlds. This would offer freelancers the opportunity to work in a creative and supportive environment, while making the most of salons as places of growth. However, work needs to be done to make that fair and feasible and to inform employers and salon owners how this can work without risking a violation of HMRC rules.

- Currently, those who mostly employ staff feel penalised by the tax system, having to pay employers' and employees' national insurance, as well as VAT liabilities. There is already a growing trend towards renting out chairs instead of hiring employed staff. These hairdressers may feel that if they "can't beat them, join them".
- The opportunity is in framing this as a positive, while also ensuring that those who prefer to be employed, as well as apprentices and junior stylists, still have places to work and train.

"I used to rule from a place of fear and tell people how difficult it would be if they went out on their own. But the industry is definitely changing; the ones that are going to do really well are the ones that change with it."

SALON OWNER, ENGLAND

"I do actually have a hybrid system now. I have no choice, really, but I think this salon doesn't really have the mindset of a self-employed salon. We're very team based, even though technically, you can rent a chair. I think hybrid businesses are the way that employed salons are going to be able to continue to operate."

SALON OWNER, ENGLAND

More and more hairdressers are advocating for a hybrid model of salon and selfemployment, where hairdressers and owners benefit from the best of both worlds.



BEN VALLANCE OWNER AND FOUNDER, STUDIO B COLLECTIVE

"Hairdressers need to feel better about themselves and feel like it's their own business. We have always been about upskilling. That is the beauty of this industry, is that you are always learning. That's why I think I have been in it for so long, and social media helps with that. The end of my career would be if a client came in with a request and for me to say that I can't do that."

Studio B Collective and Ben's story

Studio B Collective is Ben's 11-year-old co-working space for freelance hair creatives based in Somerset. Ben started off with a fully employed salon model and evolved into what is now a self-employed salon. Initially, Ben decided to open the space up for freelance hairdressers to lighten his own load and now everyone at Studio B Collective is selfemployed, besides assistants.

What makes Studio B Collective different?

In a freelance model, Ben argues, each artist can take ownership of their small business and be financially compensated for their craft. At the same time, Ben credits Studio B Collective's success to its collaborative and supportive environment. He finds that hairdressers are more supportive of one another, and that a collaborative community has been created post-COVID through social media. Rather than being in competition, his staff help each other daily which leads to a healthy and supportive culture.

He believes that if all salons offered a supportive culture, most people would stay employed under a salon model

unless they felt that they had the experience to progress into salon ownership. His perception is that many people are opening salons solely to escape bad salon culture. Additionally, Ben always offers business and social media support to stylists, making sure that no one feels alone. The salon runs regular optional training sessions and offered a mental first aid course, which he thinks is needed in an industry that is so social and for stylists who are always taking on client worries.

Looking to the future

Ben is hoping for more uniformity of standards in the industry in the future. Much of the current training and education does not prepare people properly for work, and with proper standardisation for various services the industry can be recognised more for its craft. He is also hoping to introduce new technologies to his salon, as staying up to date with science is what has kept him constantly interested in and relevant in the industry. Additionally, Studio B Collective is hoping to transform the way that they retail products, using an online platform to receive commission, rather than selling directly in the shop.

8. CONCLUSIONS AND RECOMMENDATIONS

This research has re-affirmed the existence of a number of challenges that were known to be affecting the hairdressing industry: the rise of self-employment and the difficult economic context for example. It has also surfaced opportunities for those who are willing to adapt to the new environment. In some cases, this is about innovation, e.g. in using new products or expanding services. In other cases, it is about focussing on the basics, such as excellent customer service, but applying those in different ways, e.g. online.

To support the industry to address the challenges it faces and ensure its long-term success, four recommendations emerge from this research:

9. APPENDIX

QUALITATIVE SAMPLE

Following the initial literature review and interviews with sponsors and industry stakeholders, we conducted triads (small focus groups with three participants) with hairdressers in different roles and stages of their career.

Put in place holistic training that recognises the multi-faceted nature of hairdressing.

Each day, hairdressers take on multiple roles: from stylists and businesspeople to therapists, influencers, and artists. They need training that prepares them for all the different aspects of the job. Beyond technical education, there is demand for business, marketing, and communication training as standard, setting young people up for success and allowing professionals to continue to grow and feel empowered in their careers.

The industry should promote and celebrate visions of success that reflect the different ways that the sector operates today.

Many hairdressers feel that the only way to truly progress in their careers is through self-employment or business ownership. This works for some and should be celebrated. However, there are also salon models that are successfully growing and retaining employees by rewarding performance: these should also be promoted.

A re-evaluation by Government of existing business support to ensure that both self-employed and salon-employed hairdressers get a fair deal.

Current legislative and financial incentive structures mean that self-employment is likely to continue to grow. At the same time, salons are still recognised as important places of learning and creativity. This may mean a proliferation of hybrid models, which employers will need clear guidance on.



Deliver standardisation of the industry without losing sight of accessibility and inclusivity.

Those in the industry value that it is accessible, meritocratic and offers varied career paths. However, they recognise the need for greater standardisation, such as through regulated qualifications, to protect consumers and to improve the industry's reputation, ensuring that it is recognised as the skilled profession that it is.

36 participants

ROLE

AGE

6 x apprentices and college students

- 6 x early-career hairdressers
- 6 x salon owners
- 6 x salon-employed hairdressers
- 6 x mobile hairdressers
- 6 x hairdressers who rent a chair in a salon
- 27 x England
- 3 x Northern Ireland
- 3 x Scotland
- 3 x Wales

Spread of ages from 19 to 67

8 x male, 28 x female

8 x from a minority ethnic background

Across the sample, mixed levels of confidence using digital tools and social media to support their work, mix of urban and rural locations, mix of manufacturers used

QUANTITATIVE SAMPLE

The quantitative survey was distributed via British Beauty Council and sponsors' communications channels to a wide pool of hairdressers. Participation was incentivised through a prize draw. Given the nature of the survey, the sample should not be treated as representative of all hairdressers and results are indicative, rather than definitive.

ROLE (RESPONDENTS ABLE TO SELECT MORE THAN ONE) (N=360))
APPRENTICE/TRAINEE/STUDENT	4%
SALON-EMPLOYED	9%
SELF-EMPLOYED	45%
SALON OWNER	54%
SESSION HAIR STYLIST	4%
EDUCATOR	13%
LENGTH OF TIME IN THE INDUSTRY (N=360)	
UNDER 1 YEAR	0%
UNDER 5 YEARS	3%
5-10 YEARS	7%
11-20 YEARS	26%
MORE THAN 20 YEARS	64%
LENGTH OF SALON OWNERSHIP (N=196, SALON OWNERS ONLY)	
UNDER 1 YEAR	5%
UNDER 5 YEARS	15%
5-10 YEARS	26%
11-20 YEARS	22%
MORE THAN 20 YEARS	32%
AGE (N=360)	
16-21	1%
22-35	22%
36-50	41%
51-65	32%
66+	4%
PREFER NOT TO SAY	1%

GENDER (N=360)	
FEMALE	78%
MALE	22%
PREFER NOT TO SAY/NON-BINARY/SELF-DESCRIBE	0%
CARING RESPONSIBILITIES FOR A CHILD UNDER 18 (N=360)	
YES	35%
NO	65%
ETHNICITY (N=360)	
White/White British	91%
ASIAN/ASIAN BRITISH	3%
BLACK/AFRICAN/CARIBBEAN/BLACK BRITISH	3%
OTHER ETHNIC GROUP/PREFER NOT TO SAY	2%
LOCATION (N=360)	
SCOTLAND	11%
WALES	3%
NORTHERN IRELAND	3%
LONDON	12%
SOUTH EAST (EXCL. LONDON)	20%
SOUTH WEST	13%
MIDLANDS	18%
NORTH EAST ENGLAND	5%
NORTH WEST ENGLAND	8%
YORKSHIRE AND THE HUMBER	8%

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