

ANNUAL

REPORT

2019

BRITISH
SUPPORTING A SUCCESSFUL, INNOVATIVE
BEAUTY
AND INCLUSIVE BRITISH BEAUTY INDUSTRY
COUNCIL



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CHAIRMAN'S FOREWORD

It has been a rewarding year for the British Beauty Council and looking back, I am so proud of what we have achieved.

One thing that has come out loud and clear, from all the work we have carried out this year, is the passion, energy and excellence that defines this extraordinary industry, and the crucial role that all of our patrons and advisory board play in this.

I am filled with optimism for the year ahead and with all of your support know we can make great things happen.

I would like to say a heartfelt thank you to you all and a special thanks to our wonderful CEO, Millie Kendall, and her hardworking, ever-smiling and excellent team, Diana and Rebecca. And finally thank you to the Executive Board for being so smart and committed.

Here's to a beautiful 2020...

Jane Boardman
Chairman

CEO'S FOREWORD

Creating an industry body that would represent everyone working in our industry, at every stage of their career, and across every sector of beauty, was always going to be a lot of work. But thanks to our dedicated executive board, our esteemed advisory board and our patrons, we have managed to achieve a lot in our first year.

Under our three pillars: Reputation, Education and Innovation, we embarked upon a year of activity that produced a landscape assessment of the beauty industry; a Definition of Beauty; a Road Map to future proof the industry and our groundbreaking Value of Beauty Report. The Value of Beauty has become the most comprehensive economic valuation of the beauty industry to date, and demonstrates how important and impressive our contribution to the U.K. economy really is.

In September 2019, we launched the inaugural London Beauty Week, which will become bigger and broader in September 2020 as it evolves into British Beauty Week.

We will be branching out to key regional hubs with extensive patron and brand involvement, and providing engagement for all those in the industry. Watch this space!

As we continue to grow, our work is being recognised across many media outlets. It's also resonating with those working in the beauty industry as well as with the consumers who are buying our products and services. I would like to thank everyone for their unwavering support, it has been a truly exciting year for the British Beauty Council and I can't wait for you to see what we have planned for 2020.

Finally, I would also like to thank our Chairman, Jane Boardman, for her support and for being the driving force for change we have needed in our industry for many years.

Thank you all for a wonderful year and see you in 2020.

Millie Kendall MBE
CEO

THE DEFINITION OF BEAUTY

It was our intention to define the beauty industry in order to understand the components of its economic and social contribution.

This report defined the jobs that sit within the beauty sector which reflect the multi-dimensional nature of the industry.

The research was undertaken by Britain Thinks, an international insight and strategy consultancy. The company used co-creative workshops, quantitative surveys and qualitative depth interviews, conducted with members of the industry. This also included a drafting, testing and refining process with stakeholders, to ultimately find an agreed definition.



96%

of stakeholders support the definition, despite a range of views from a diverse set of individuals

Research concluded beauty products and beauty services are both vibrant and important aspects to the industry and thus require separate definitions.

DEFINITION: BEAUTY AND GROOMING PRODUCTS

Beauty and grooming products are consumer and professional goods purchased to enhance and/or maintain personal appearance, presence and/or well-being. They will include categories such as cosmetics, skin, hair and body care, personal care and hygiene products, accessories and applications.

DEFINITION: BEAUTY AND GROOMING SERVICES

Beauty and grooming services are professional treatments purchased by consumers to enhance and/or maintain their personal appearance, presence and/or well-being. They will include categories such as treatments and tutorials for hair, nails, face and body, and cosmetic and surgical procedures.

THE VALUE OF BEAUTY

The British Beauty Council commissioned an economic valuation of the beauty industry. Using the Definition of Beauty, Oxford Economics produced an in-depth report, demonstrating the direct, indirect and induced impact on the country's economy, by the beauty industry.

Until the Value of Beauty Report, there had been no comprehensive attempt to quantify the value of the beauty industry – either in terms of contribution to GDP or employment. The diverse range of goods and services, and the lack of recognition in official industry classifications, means there has been no fixed definition of what the beauty industry actually consists of. This has limited public understanding of the value of the industry to the UK economy, and restricts its ability to promote itself as a single entity.* It was our intention to rectify these major omissions through this report.

ECONOMIC IMPACT

This landmark report produced staggering statistics on the industry, valuing the contribution to British GDP at £28.4 billion – this equates to 1.3% of the U.K's total GDP.



The key driver of value from the beauty industry is generated by consumer spending, which totalled £27.2 billion. The largest share of this came from purchases of care and maintenance products, worth £10.4 billion. A further £8.7 billion was generated through purchases of personal enhancement products, while £8.0 billion was spent on the huge range of beauty services.**

The Value of Beauty Report also calculated that the beauty industry supported a total of 590,500 jobs in 2018. This equates to one in every 60 jobs in the UK economy, and is similar to the number of people employed in Birmingham last year. It also found that the beauty industry supported £7.0 billion in UK tax revenues in 2018 – equivalent to the combined salaries of 250,000 nurses and midwives.

*Value of Beauty Report, p.7

**Value of Beauty Report, p.7

***Value of Beauty Report, p.8

THE VALUE OF BEAUTY

BOOSTING THE UK ECONOMY'S POTENTIAL

As well as its core contributions to the UK economy each year, the beauty industry boosts the UK's productive potential by supporting the acquisition of new skills among its employees. One of the key factors driving this is education. In 2018, a total of 65,550 people achieved beauty-related vocational qualifications.*



WHY DID WE COMMISSION THE VALUE OF BEAUTY REPORT?

This report was a crucial undertaking for a number of reasons. To lobby government and drive our bid for beauty to become a Creative Industry, the British Beauty Council needed to unite the industry and highlight its worth.

It is our hope that demonstrating beauty is a viable economic contributor raises our profile and reputation, encouraging government awareness and support for our sector.

Oxford Economics is a leader in global forecasting and quantitative analysis, with a clientele comprising international corporations, financial institutions, government organisations and universities.

Commissioning this organisation to conduct our valuation was essential in gaining traction with government officials, media and industry.

The Value of Beauty Report demonstrates that beauty is a powerful and influential industry and provides a benchmark to measure industry growth in years to come.



*Value of Beauty Report, p.9

COSMOPROF

14-17 MARCH 2019

The British Beauty Council attended Cosmoprof Worldwide Bologna in March 2019. Cosmoprof is the leading trade show globally, bringing together all areas of the beauty industry, from raw materials to finished product.



Visitors at Cosmoprof Bologna 2019 © Cosmoprof

In 2019 the exhibition in Bologna hosted over 265,000 attendees. Cosmoprof held an array of exhibiting halls including Cosmopack, Cosmetics and Perfumery, Cosmoprime, Green Beauty, Hair, Nails and Beauty Salon, as well as hosting a series of talks and competitions around beauty innovation.



Makeup artist giving live demonstrations for professionals at Cosmoprof Bologna 2019 © Cosmoprof

+265,000

visitors to Cosmoprof
Bologna 2019



Panellists at Cosmoprof Cosmotalk © Cosmoprof

Attending Cosmoprof was an opportunity for the British Beauty Council to raise the profile of the British beauty industry on an international scale as well as keeping up-to-date with global beauty innovation.



Diana Kennedy from the British Beauty Council at Cosmoprof

NATIONAL & INTERNATIONAL MISSIONS

The British Beauty Council has taken part in two trade missions in 2019. The first of which, was to New York on 2-4 April. This was part of the Department for International Trade's 'Designing our Futures' Campaign, which showcased the Best of British Innovation with a three-day event. Designing our Futures put the spotlight on Britain's transatlantic partnerships that are hoping to solve society's shared challenges.



Panelist at the 'Venturing Through The Glass Ceiling: Closing the VC Gap for Female Founders' panel talk, during the Designing our Future event

The event included leadership seminars, workshops, conversations, panels and keynote speakers. Millie Kendall MBE, CEO of the British Beauty Council, took part in a live interview with Zanna Rassi, Founder of Milk Makeup, followed by a Q&A.

The event was attended by more than 100 thought leaders, influencers, entrepreneurs and decision-makers, across key industries ranging from technology to sustainability in fashion.



Zanna Rassi and Millie Kendall MBE (L-R), at the Design our Future event

The British Beauty Council also took part in a trade mission to Dorset, with the Department for International Trade. The event, held at Lush headquarters, required Millie Kendall to present the Value of Beauty Report to delegates from the U.S. and Europe. The mission provided outreach for the U.K. beauty industry and highlighted the value of our industry to an international audience.

ROADMAP THINK TANK

26 APRIL 2019

The British Beauty Council held a Roadmap Think Tank at Harvey Nichols, London. The event was attended by a variety of industry executives, advisors, regulatory bodies and academics.

Participants were split into focus groups to discuss the Founding Pillars of the British Beauty Council - Reputation, Innovation and Education - and provide further working points under each area. The discussions were used to create the next iteration of the organisation's Roadmap and shape initiatives moving forward.



Participants at the British Beauty Council Roadmap Think Tank



Caroline Hirons and Louise Young at the British Beauty Council Roadmap Think Tank



Participants at the British Beauty Council Roadmap Think Tank

STELLA LIVE

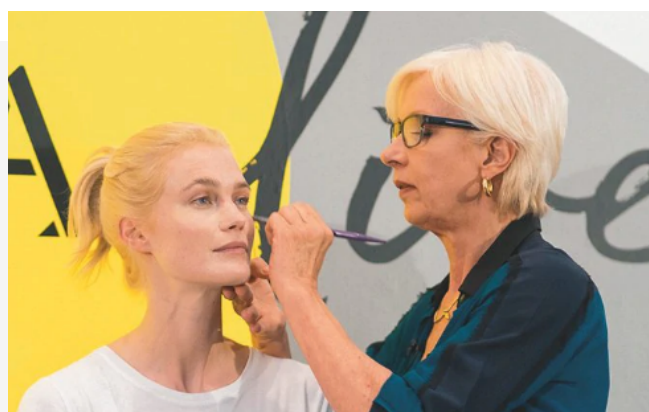
10-11 MAY 2019

The British Beauty Council partnered with The Telegraph's Stella Magazine to create Stella Live 2019. Stella has nearly 650,000 readers with a large audience of women over 40.



Panel talk at Stella Live ©Telegraph

The event was held at the Saatchi Gallery and featured products, treatments, panel talks and workshops. This was a consumer facing event and a celebration of ageless style and beauty. Over 2,500 guests attended and speakers included leading names such as Mary Greenwell, Jodie Kidd and Davina McCall.



Mary Greenwell giving a beauty demonstration at Stella Live ©Telegraph

2,500

guests attended Stella Live
over two days.

This was a valuable initiative for the British Beauty Council. Diversity and Inclusivity underpins our Reputation Pillar and age is an often ignored topic in this conversation. It is important to show the British Beauty Council represents all age categories in beauty and recognises the significance of each group.

The event was also valuable in introducing the British Beauty Council to a wider audience and engaging more people with the work we do.



Millie Kendall MBE, with Clare Hopkins and Rebecca Hopkins, Co-Founders of Balance Me, at Stella Live

DECODED FUTURES

26 JUNE 2019

The British Beauty Council partnered with Decoded Futures to create a Beauty and Wellness stage at the Decoded Futures Summit. The British Beauty Council was a lead sponsor along with Barclays bank. This event showcased creative, collaborative and sustainable future trends and had over 600 guests, made up of brands, retailers, tech companies and startups.

Panel talks included Sharmadean Reid MBE, founder of WAH Nails, Trinny Woodall of Trinny London and Rachel Humphrey PR & Partnerships Director of Birchbox, among others. The event also featured topics such as fashion, tech, travel, lifestyle and luxury..



Panellists Neil Moodie, Kate Shapland, Brenda McGuirk at the Beauty and Wellness talk, at Decoded Futures 2019

As a cross-industry event, Decoded Futures provided effective outreach to audiences both inside and outside of the beauty industry. Demonstrating that beauty sits alongside other creative sectors, such as Fashion and Tech, supports our bid to become a Creative Industry.

The panel talks at Decoded Futures addressed innovation and consumer trends, demonstrating the beauty industry is forward-thinking and adaptable to change. This supports our mission to promote the beauty industry and raise its reputation.



Sponsorship banner at Decoded Futures, 2019

LONDON BEAUTY WEEK

11-15 SEPTEMBER 2019

On the 11th-15th of September 2019, the British Beauty Council and CAPCO co-hosted the first ever London Beauty Week in Covent Garden.

The event included a variety of interactive and experiential activities. Covent Garden resident brands hosted in-store activities such as fragrance profiling and flower arranging, complimentary massages and make-overs, DJ sets, cocktails, beauty boutiques, give-aways and gifts, make-up masterclasses and workshops.



Visitors at the Beauty Playground at London Beauty Week

Restaurants and bars also took part, with bespoke beauty cocktails and desserts, floral installations and other discounts and offers. External brands took part through the sponsorship of in store pop-ups, East Piazza pop-ups, beauty swings and goody-bag contributions.

The East Piazza was transformed into an interactive beauty playground, featuring a variety of brands providing experiential activities, offers and games. A series of panel talks ran throughout the week, held in a custom-fitted pop-up on Floral Street. Each talk addressed issues affecting the industry or 'hot' topics in beauty, such as sustainability, tech, beauty business, myth busting, conscious beauty and a live podcast. Panellists included inspiring names such as Jasmine Hemsley, Funmi Fetto and Jo Jones – to name a few.



Guests talking to Jasmine Hemsley after the Conscious Beauty and Wellbeing panel talk, at London Beauty Week

LONDON BEAUTY WEEK

11-15 SEPTEMBER 2019

Each panel talk seated 100 people, with 4 out of 6 talks selling out within days of being announced. Up to 450 people attended and the talks attracted a mixture of consumer and industry professionals. London Beauty Week's charity partner was Beauty Banks and donation boxes were placed throughout Covent Garden.



Guests queuing for a London Beauty Week panel talk

All proceeds from the panel talk ticket sales were donated, culminating in over 1000 product donations and £4,500 raised.

The British Beauty Council hosted a pop-up, located on Floral Street, which housed a Haircuts for Homeless (H4H) event and the Next Big Beauty Brand competition.



Beauty Bank donation boxes at the London Beauty Week panel talks © Covent Garden

The H4H event featured industry legends Adam Reed, Johnnie Sapon, Leigh Keates, Neil Moodie and Stewart Roberts, giving haircuts to some of London's homeless community. The pop-up was later opened to the public for outreach and received up to 300 visitors.



Haircuts 4 Homeless event at London Beauty Week: Adam Reed, Neil Moodie, Stewart Roberts, Johnnie Sapon and Leigh Keates (L-R)

LONDON BEAUTY WEEK

11-15 SEPTEMBER 2019

London Beauty Week featured in 46 press and media articles, including publications such as The Telegraph, Evening Standard and Harper's Bazaar creating a reach of 125 million.

125M

press and media reach for London Beauty Week

Social Media statistics included: 5,000 Facebook video views; 8M Facebook page impressions; 400,000 impressions on Instagram; 11,000 Instagram engagements and 10,000 visits to the London Beauty Week web page. The British Beauty Council is looking forward to consolidating findings from this inaugural event and repeating the event across the U.K in 2020.

London Beauty Week was a particularly valuable initiative and helped elevate the profile and reputation of the beauty industry.

The link to London Fashion Week proved useful in bolstering the image of beauty as a professional and global business.



Sustainability panel talk at London Beauty Week with Anna Teal, Boots, David Alpert, IIAA, Jayn Sterland, Weleda (L-R)

London Beauty Week demonstrated the beauty industry can be fun, experiential and entertaining, yet also serious and able to address relevant challenges and issues. Creating a programme of educational panel talks and highlighting our charity partners at the event showed that the beauty industry is capable of engaging people on a deeper level and can bring difficult topics to the forefront.



Johnnie Sapong giving a haircut at H4H event at London Beauty Week

NEXT BRITISH BEAUTY BRAND

13 SEPTEMBER 2019

The Next British Beauty Brand was a competition held during London Beauty Week, as a partnership between the British Beauty Council, Covent Garden, WGSN and Harvey Nichols.

198 brands entered to compete in a Dragon's Den style event, with the winner taking a prize of a bespoke pitch in Covent Garden; a year's subscription to WGSN beauty; a listing at Harvey Nichols Beyond Beauty and mentorship from an array of celebrated judges.

24 brands made the shortlist and were invited to pitch their brand to a panel of judges, including, Millie Kendall MBE, Michelle McGrath Director of Covent Garden, Jo Osbourne Head of Beauty Harvey Nichols, Saska Graville Head of Content WGSN, Vanita Parti Blink Brow Bar, Loretta De Feo Dizziak and Charlotte Mensah.

The judges selected 4 finalists – By Sarah London, ShakeUp Cosmetics, Albiva and Jecca Blac.

The 4 finalists' business plans and samples, were sent to Emilie Spire from Felix Capital for financial viability checks, and Ruby Hammer MBE. Albiva Skincare was ultimately crowned the winner and selected as the Next British Beauty Brand.



ALBIVA pop-up on Floral Street, Covent Garden

The NBBB was an exciting and rewarding initiative, supporting our Innovation Pillar. The competition was synonymous with our mission to utilise the industry to support new brands. NBBB not only provided an incredible opportunity for the winner, but also allowed the judges to give advice, experience and awareness to shortlisted brands. Several brands who presented have also utilised the exposure the NBBB granted and received listings in retailers. We plan to use our learnings from this competition to repeat and grow this initiative in 2020 and continue supporting innovation in the beauty industry.



Shortlisted contestants queuing to present to the judging panel at the Next British Beauty Brand

OLYMPIA BEAUTY

29-30 SEPTEMBER 2019

Olympia Beauty is autumn's biggest event for beauty professionals, held at Kensington Olympia, London. The two-day show attracts almost 20,000 visiting professionals, hosts over 500 exhibiting brands and facilitates over 80 product launches.

From 29-30 September 2019, the British Beauty Council collaborated with founding patron, Treatwell, to create an inspiring 2 days of panel talks.



Millie Kendall MBE moderating the Facials and Best Practise talk with Dija Ayodele and Caroline Hirons at Olympia Beauty

The 10 different topics* ranged from 'Building a Brand' to 'Best Practice for Facials' and included panellists such as Caroline Hirons, Sam Farmer and Hayley Hall.

18,932

Guests attended Olympia on the 29 and 30 September

The stage itself was located at the entrance of the exhibition, proving excellent exposure for the talks. 18,932 guests attended across the two days and according to an exit survey**, nearly 70% of visitors were actively aware of the stage, with 20% indicating they attended a talk.

Olympia Beauty supported our Reputation Pillar and provided a platform for outreach to the professionals in our industry. It demonstrated our commitment to addressing relevant topics in the beauty industry and provided support and advice from a variety of specialists.



Panellists and audience at Olympia Beauty

*Full list of panel talks included: The Beauty of Tech; Sustainability & the beauty industry; Nail Innovation; Makeup Demonstration and Wellbeing; Keeping Clients Safe; Henna Demonstration; Facials, Best Practise; Creating Content That Works; Building A Brand and Become a Charity.

**Exit survey conducted by Treatwell

IS BEAUTY INCLUSIVE? PANEL TALK AND THINK TANK

14 NOVEMBER 2019

The British Beauty Council hosted a Diversity and Inclusivity panel talk and think tank, at the British School of Fashion. The event was comprised of two panel talks on consumer trends and needs and commercial imperatives for business. Attendees were then split into three groups and given a list of discussion topics to initiate conversation flow on different aspects of diversity and inclusion.



Fiona Ibanez-Leach moderating the consumer imperatives for business panel talk, with Navaz Batliwalla, Anita Bhagwandas, and Dr. Ateh Jewel

Addressing issues surrounding diversity and inclusion underpins the British Beauty Council's Reputation Pillar.



Panellists and audience at the Diversity and Inclusion panel talk

The think tank delivered valuable insights and will provide the basis for a British Beauty Council academic report in 2020. This will help us create a roadmap for the work we undertake and ensure we are representative of the industry.



Panellists and audience at the Diversity and Inclusion panel talk

THANK YOU

Thank you to everyone who has supported us and the work we have done this year. We are indebted to our generous patrons, without whom we could not have achieved all that we have. We also thank our Advisory Board, Affiliates and Supporters, who have dedicated their time, resources and expertise to further our mission and drive positive change in the beauty industry.

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British Beauty Council



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