
BRITISH BEAUTY COUNCIL

SUPPORTING A SUCCESSFUL, INNOVATIVE
AND INCLUSIVE BRITISH BEAUTY INDUSTRY



JANUARY 2019

DEFINING BEAUTY

FULL REPORT



Contents

01

Background and methodology

02

Key findings

03

The British beauty industry: Context

04

Definition: Blurb

05

Definition: Beauty and grooming products

06

Definition: Beauty and grooming services

07

Definition: Enabled activities

08

Recommendations

09

Response

1

Background and methodology

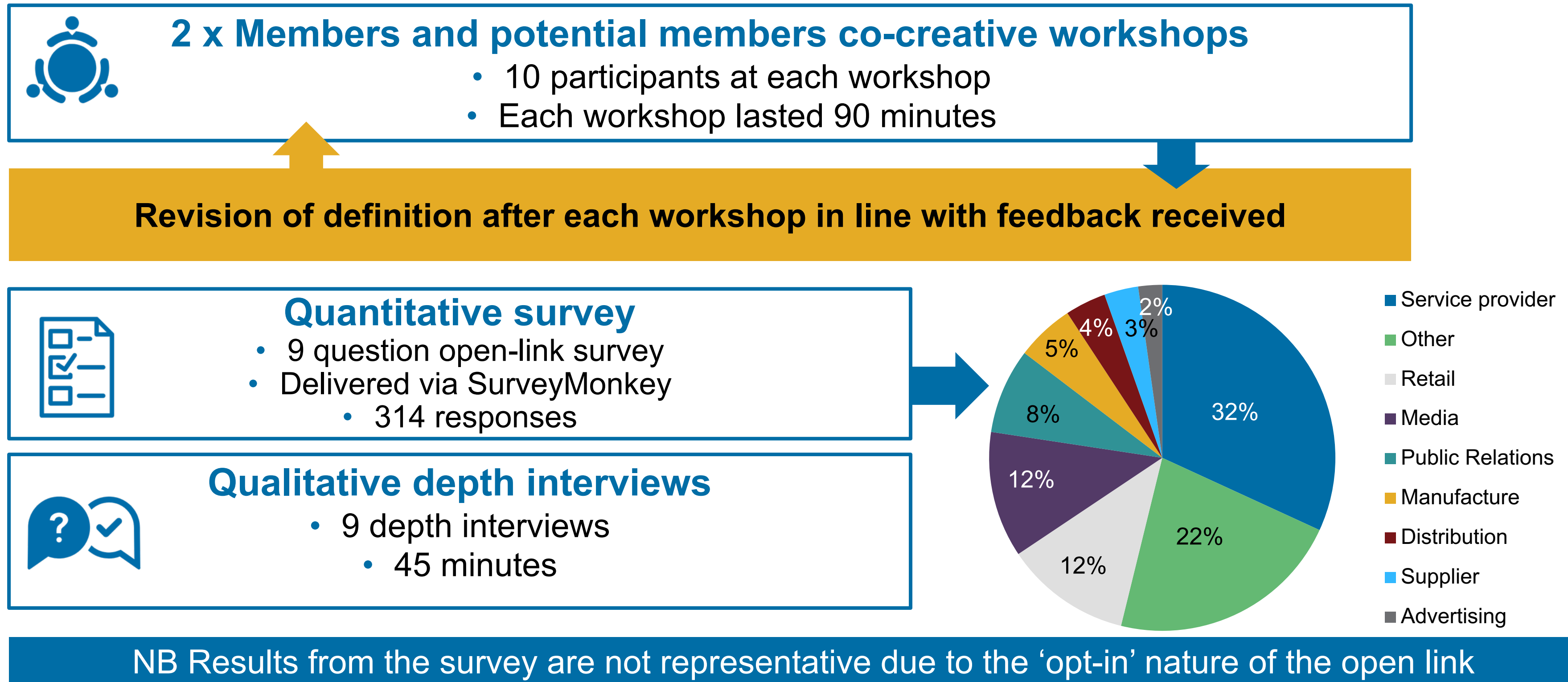
Background to the project

- The British Beauty Council is an industry body representing all areas of the beauty sector
- Its ambition is to ensure that the beauty industry is recognised and valued at all levels of government, through the wider economy and by consumers
- The British Beauty council, working with Oxford Economics, will therefore produce an economic valuation and impact report of the beauty industry
- To inform this valuation, the Council commissioned BritainThinks to assist developing a definition of the industry by testing a draft version with key stakeholders



BRITISH
BEAUTY
COUNCIL

Methodology



2

Key findings

Key findings

1

There is a real enthusiasm for celebrating the success of the British beauty industry; it is seen as innovative, valuable and inclusive.

2

Stakeholders voice strong support for the role of the British Beauty Council and its mission to measure the industry's economic contribution and impact, partly in recognition of the industry's undervalued and disparate nature.

3

Despite a range of views from a diverse set of stakeholders, there is widespread support for the definition as it stands (i.e. after initial amends).

4

There is strong backing for the blurb to be as open as possible, including 'maintenance' and 'wellbeing', to reflect the multi-dimensional nature of the industry.

5

A clear majority of respondents support the inclusion of almost every product and service tested. The only exception is body modifications where similar proportions oppose as support inclusion.

6

On the few occasions where inclusion of a product or service is contested, it is primarily where the beauty industry is seen to overlap with the health and wellbeing industries. For example, holistic treatments or medical beauty.

3

The British beauty industry: Context

Immediate associations with the British beauty industry are positive, though it is also perceived to be undervalued



Reponses to the worksheet *'Please write down three words or phrases that spring to mind when you think about the British beauty industry'*

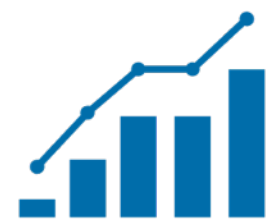
Stakeholder perceptions of the beauty industry are largely positive, describing it as progressive and successful



Innovation and the fast-moving nature of the industry are widely mentioned, with participants highlighting:

- New techniques for marketing, booking and selling products and services
- Research and development of new technologies/ products
- Disruptive brands and influencers challenging the dominance of bigger organisations

“People see a gap in the market – and it’s becoming increasingly competitive in those gaps. It’s not just big traditional players.”
Workshop



The industry is seen as highly entrepreneurial and **successful**

- Great economic contributions, on a par with other creative industries
- Fosters creativity and entrepreneurship
- Location-specific services support the survival of the British high street

“It’s quite vibrant. It generates a lot of money – it’s lucrative.”
Depth interview



Participants describe the industry as **open** and **accessible**

- Especially empowering for women
- Relevant to everyone, regardless of ethnicity, age, background, etc.
- YouTube and other technologies also enable people from various backgrounds to develop and share their products and ideas

“We have everybody – we’re terribly inclusive and willing to experiment.”
Workshop

Common concerns about the industry revolve around its under-appreciation, alongside lack of unity and regulation



Stakeholders widely agree that the industry is **under-valued** and under-appreciated

- Seen as frivolous
- Lack of awareness about economic impact

“We’ve always been seen as a poor relation to fashion, when ironically we probably make more money.”

Workshop



The beauty industry is described as **disconnected**, with minimal communication between different sectors

- The breadth and competitiveness of the industry are seen as preventing various sectors from working together
- Exacerbating the issue of being under-valued

“We don’t really talk to each other at all – this is the most contact I’ve had with other people in the industry.”

Workshop



Some participants describe the industry as **mistrusted**, which they feel stems from:

- Under-regulation leading to poor quality and potentially dangerous treatments
- No set standards for qualifications and service provision
- Lack of impartiality: hidden promotions and advertising through influencers

‘WE NEED REGULATION!’

Survey

Stakeholders feel that the Council has come at a perfect time to help unite the industry and promote its contributions

- Stakeholders are enthusiastic about finally having a representative body to address the challenges in the industry
- The Council is particularly seen to have a role in:



Championing the value of the industry



Uniting different sectors in the industry



Making regulation more consistent

“Thank goodness there is a body looking to come together and speak to people at the highest possible level to get recognition and regulation where it's needed.”

Depth interview

“I think the British Beauty Council should be advocates of safe practices within the industry as this is an area that other organisations do not cover in any great detail.”

Survey

4

Definition: Blurb

We tested and refined the introductory blurb for both products and services

Beauty products

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



Beauty and grooming products

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



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 fragrance, **essential care** products, accessories and applications.*

Beauty services

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



Beauty and grooming services

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



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.*

‘Beauty’ is felt to go beyond just the ‘enhancement’ of personal appearance

Stakeholders are keen to make the blurb as inclusive as possible, by making three key additions:



Grooming



Maintenance



Wellbeing

‘Beauty’ is felt to go beyond just the ‘enhancement’ of personal appearance

Stakeholders are keen to make the blurb as inclusive as possible, by making three key additions:



Grooming



Maintenance



Wellbeing

- There is a tendency for stakeholders to refer exclusively to women when discussing the beauty industry
- Discussion during the first workshop led to the inclusion of ‘grooming’ (beauty and grooming products/ services) to make it more inclusive of men
- Specific references to men’s grooming were suggested for both products and services, e.g. barbering, beard products
- The term ‘beauty’, from a men’s grooming perspective, is still quite closed off from men
 - But ultimately, the definition does take into account men’s grooming for the purposes of an economic valuation

“When I hear the word beauty, I think of female beauty. It’s quite a segregated market. The female market is called the beauty market and the male market is the grooming market.”

Depth interview

*“[It should include] male grooming
e.g. beard products.”*

Survey

‘Beauty’ is felt to go beyond just the ‘enhancement’ of personal appearance

Stakeholders are keen to make the blurb as inclusive as possible, by making three key additions:



Grooming



Maintenance



Wellbeing

- ‘Maintenance’ is seen as a crucial addition to the definition
 - It is seen to be particularly relevant for personal care and hygiene products, which do not necessarily ‘enhance’ personal appearance or presence
- Many feel that consumers are likely to view many products and services as basic maintenance rather than strictly ‘beauty’ related

“The other thing was to maintain or to enhance – it’s a human right to be clean. You shouldn’t call using a shower gel a beauty product.”

Workshop

“[It should] also include the impact it makes on mental well-being of clients, and to emphasise the treatment of skin, as well as mentioning the maintenance and upkeep of appearance.”

Survey

‘Beauty’ is felt to go beyond just the ‘enhancement’ of personal appearance

Stakeholders are keen to make the blurb as inclusive as possible, by making three key additions:



Grooming



Maintenance



Wellbeing

- Many stakeholders see wellbeing as part and parcel of the beauty industry. This has two elements:
 1. Wellbeing is a primary goal of the beauty industry: enhancing personal appearance (e.g. with cosmetics) improves consumers' confidence and happiness and therefore increases their wellbeing
 2. The link between inner and outer beauty means that products and services with a primary function of improving wellbeing can have a secondary purpose of improving personal appearance, e.g. a consumer might purchase vitamins to improve their health, as well as the appearance of their skin

“We feel strongly that wellbeing need including... Everything from aroma therapy to guided meditation.”

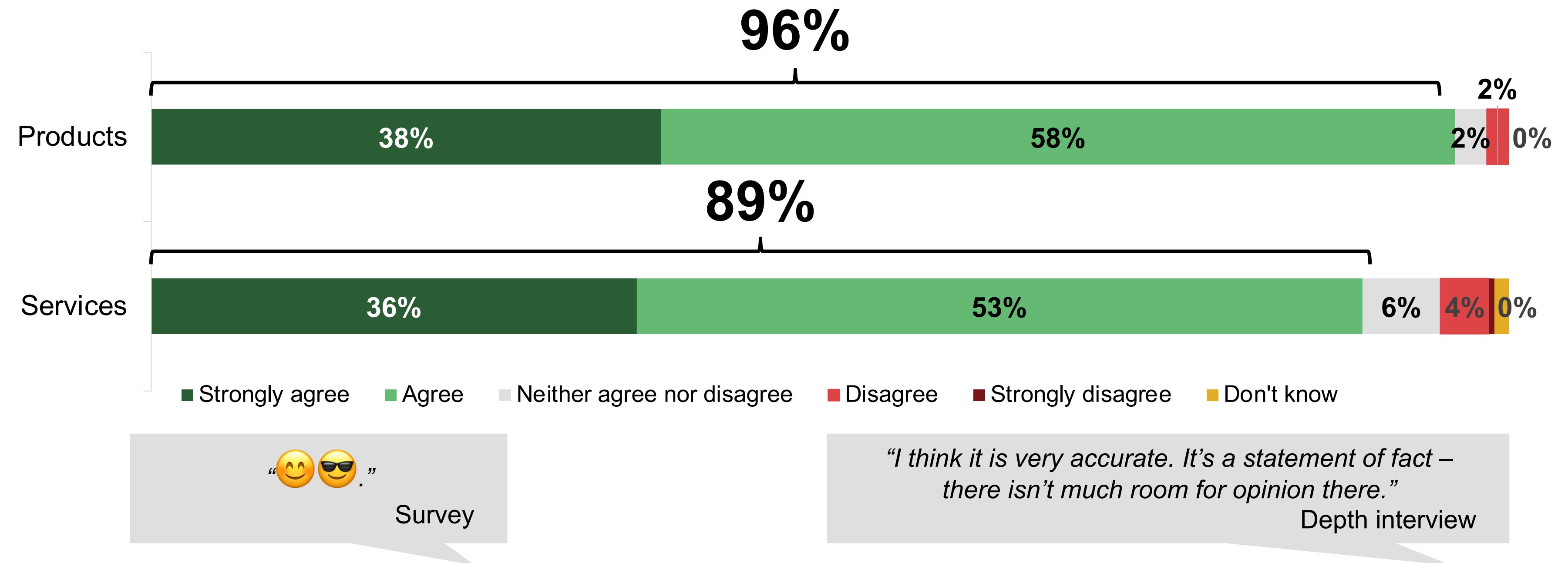
Workshop

“[Wellbeing] is a hard thing to quantify... It manifests itself through a change in perspective, which is either directly how you look and see yourself, in the mirror, or confidence and how you carry yourself. As well as the ability to be comfortable in how you see yourself.”

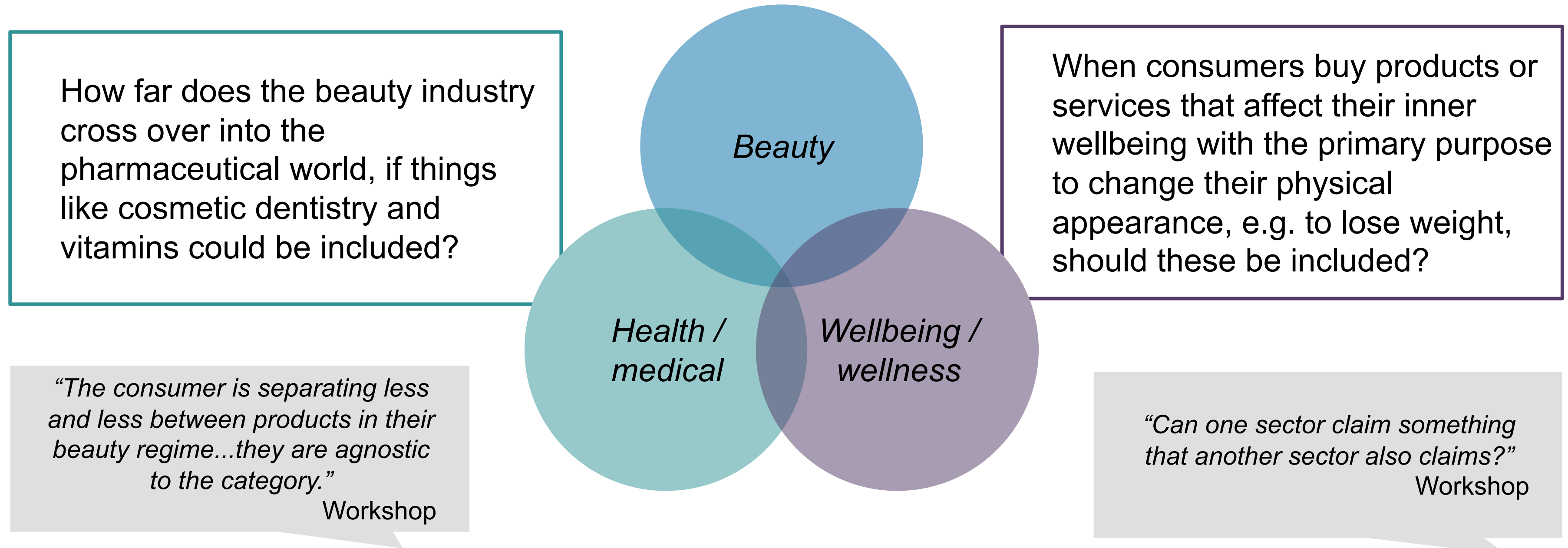
Depth

The vast majority of stakeholders accept the expanded versions of the blurb

Agreement that [the blurb] accurately defines products/ services in the British beauty industry

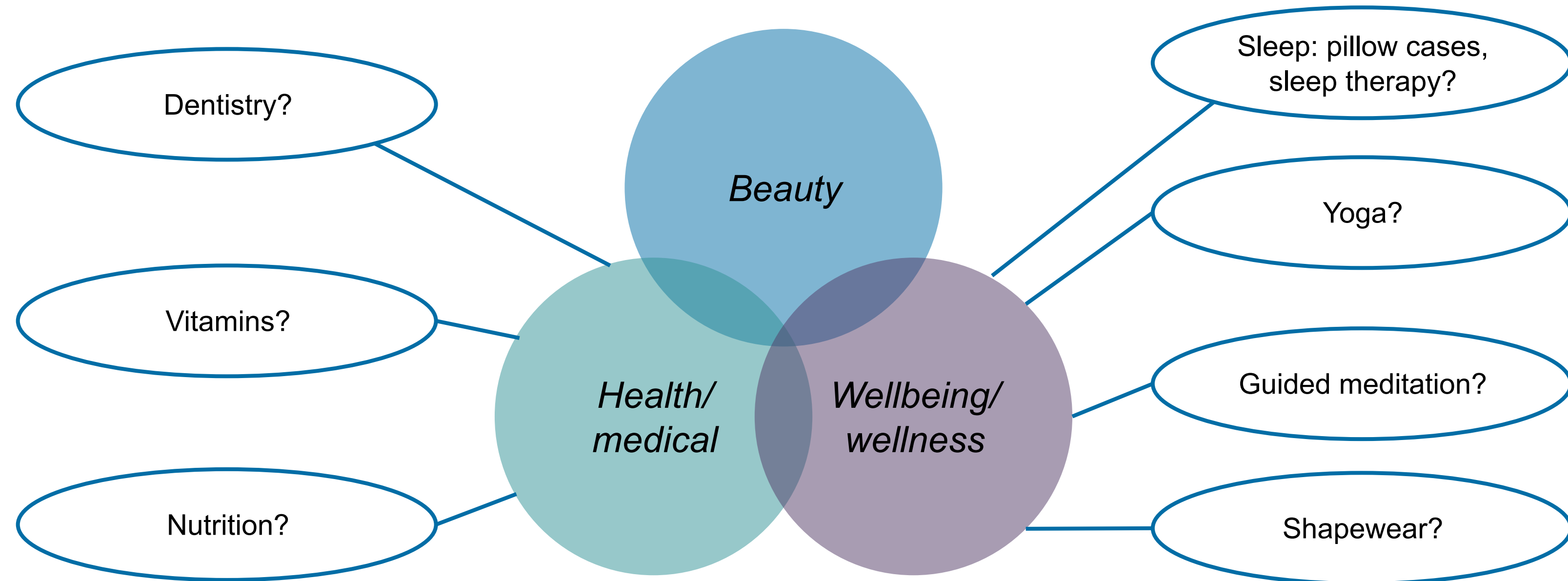


But expanding the definition poses questions over how to draw the line between the beauty industry and other industries



Ultimately the British Beauty Council needs to decide where the boundaries of the beauty industry lie

Lack of resolution to this dilemma leads to suggestions for a very wide-ranging list of products and services



Views are particularly divergent on specific categories due to the range of experiences within a siloed industry; every stakeholder wants to champion their own area of expertise

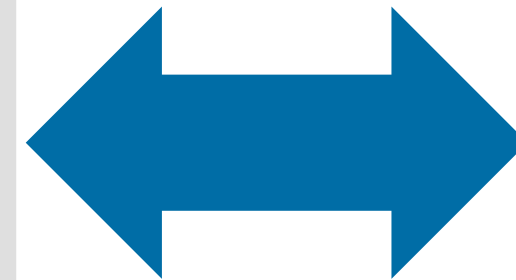
These products and services on the periphery of the beauty industry are highly controversial

"If you look at nutrition - there are many oral supplements that [are] beauty products. If you look at the market for oral collagen supplements - that's a huge market."
Depth interview



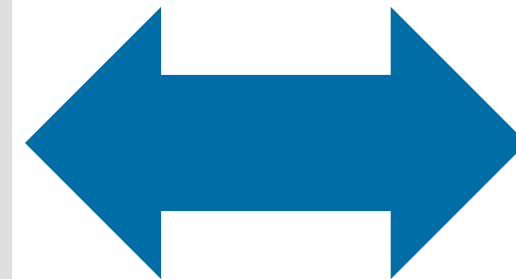
"Beauty supplements and ingestibles – that's going down the line of diet and pharma."
Depth interview

"I think beauty should be in the health space."
Workshop



"It's about making you feel better - there's nothing in the industry that should be misconstrued as being medical - it's not wellbeing as in health, but wellbeing as in making you feel better."
Depth interview

"It doesn't contain anything to do with fitness – fitness supplements, nutrition. That sort of wellness area is missing. There's a lot of stuff in the fitness industry that is shading into appearance."
Workshop



"[Yoga] - is that beauty? I'd say it's wellbeing, but beauty is where the physical effect on the mind. I'd say those are the entry points - they should come under wellness."
Depth interview

And a broader definition may impede its aim of achieving recognition for the value of the beauty industry

- Although the purpose of the definition (for an economic valuation) is not always front-of-mind for all stakeholders, several note that the broad remit of the definition may create problems for the eventual use of the valuation
- Concerns revolve around two primary issues:
 1. MPs, the Treasury and other parties may find the definition too broad to accurately convey the beauty industry, or through covering multiple sectors, it might extend outside their scope of interest
 2. Organisations within certain sectors mentioned in the definition may contest their inclusion and diminish its credibility

“They have to be very careful about how that information is used, because if you start to mislead Government, you will get yourself into real difficulty. Each sector will sit in a specific Government department, so if you’re trying to raise visibility at that level, you have to be really clear which part of the sector you are talking about, and what you are asking for. I know the BBC is aware of this, but the voice must be clear, it mustn’t be a mixed voice, and it must have authority.”

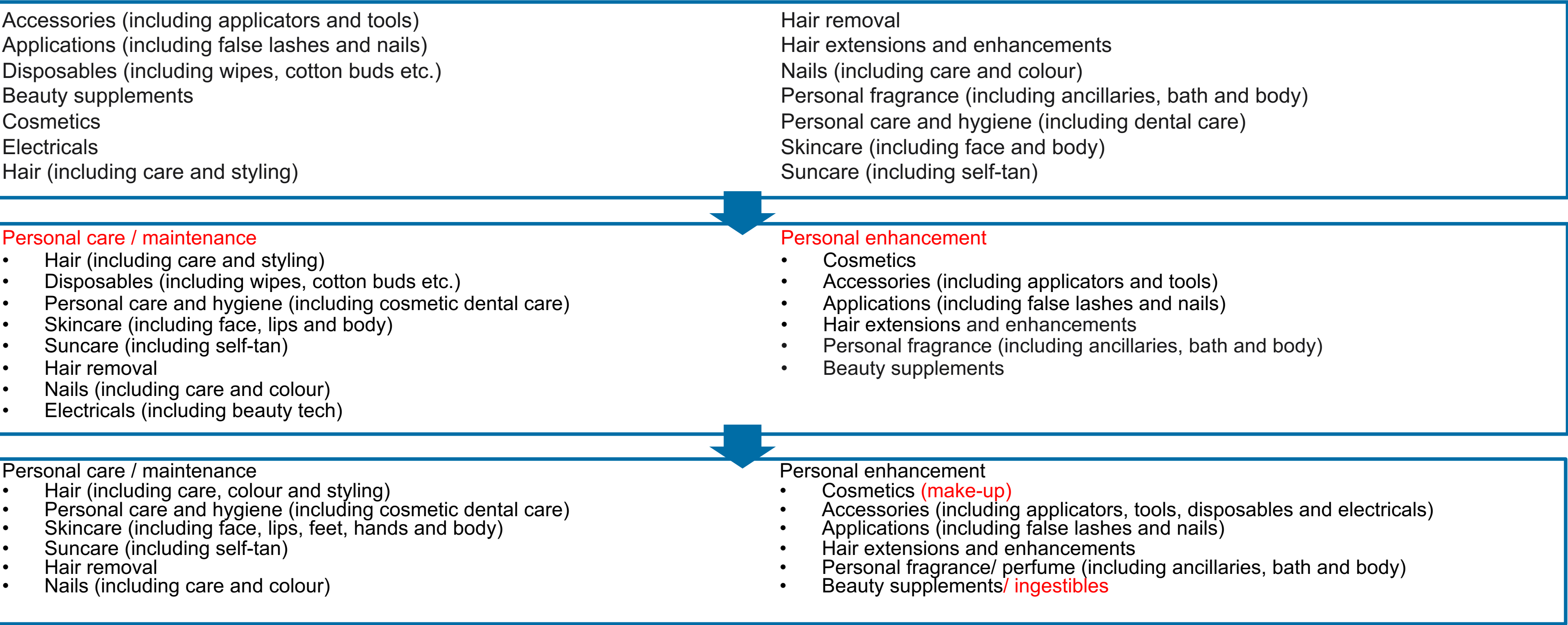
Depth interview

Overall, there is a danger that the valuation may over-extend itself, and damage either the credibility of the Council’s work, or the industry’s achievements and efforts

5

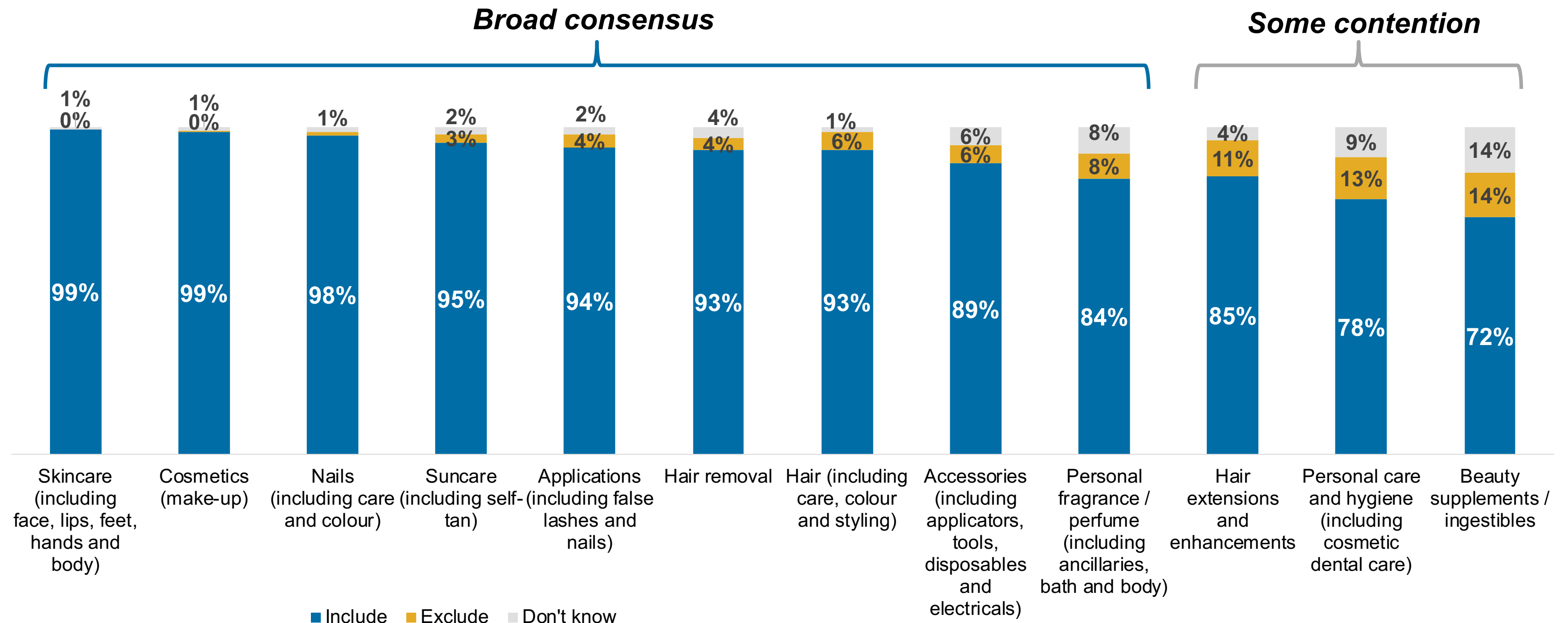
Definition: Beauty and grooming products

We tested and refined a list of beauty and grooming products



A clear majority of stakeholders support the inclusion of each item on the list of beauty and grooming products

A clear majority of stakeholders support the inclusion of each item on the list of beauty and grooming products

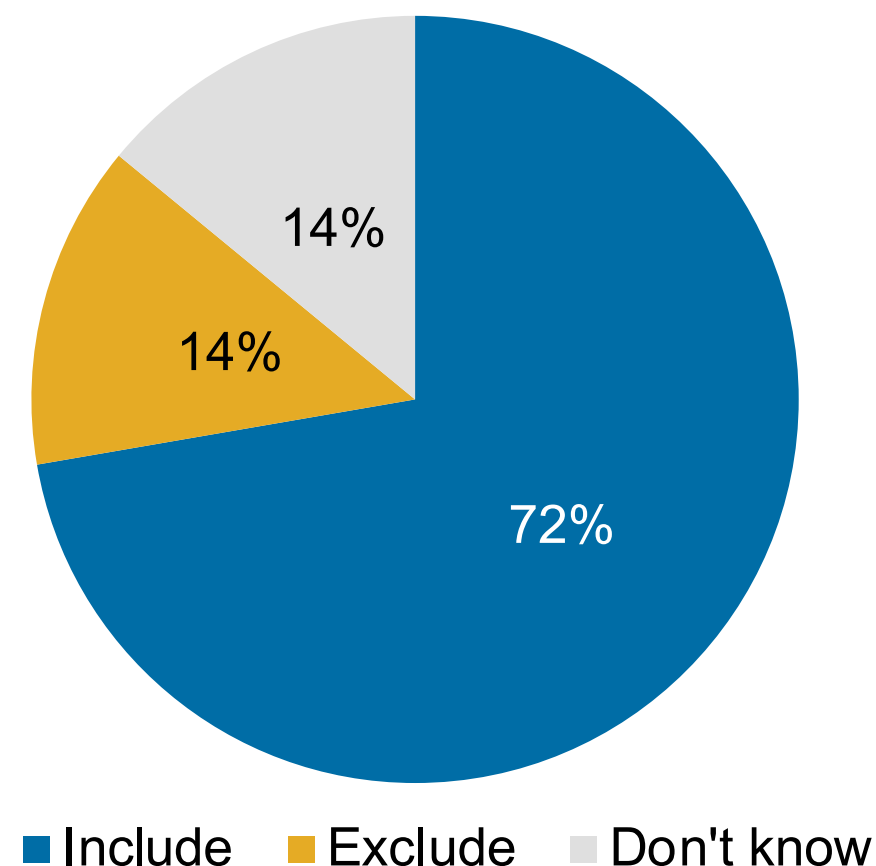


Whilst they are still supported by a majority, three areas provoke further discussion and some disagreement



Beauty supplements are a key area of the health vs beauty debate

**Beauty supplements /
ingestibles**



- 72% think that beauty supplements / ingestibles should be included
 - Of these, a small minority of stakeholders want to expand this category, suggesting there should be a broad category of 'consumables', including products such as wellness drinks and fat-reducing pills
 - A number of alternative terms from beauty supplements were put forward, including 'nutraceuticals', 'nutri-cosmetics', or 'beautyceuticals'
- But one in seven do not think they should be included, feeling there needs to be a firm line between the pharmaceutical industry and the beauty industry
 - And some argue that expanding the category even further steps too far into the health and wellness sphere

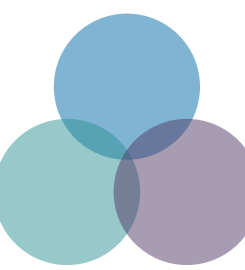
"You've got to be careful because it goes down the medical path – when products start having a medical claim on them, they shouldn't be included in beauty."

Depth interview

"Vitamins, and anti-aging supplements – they are very big. Also health drinks – from coconut water to ginger water."

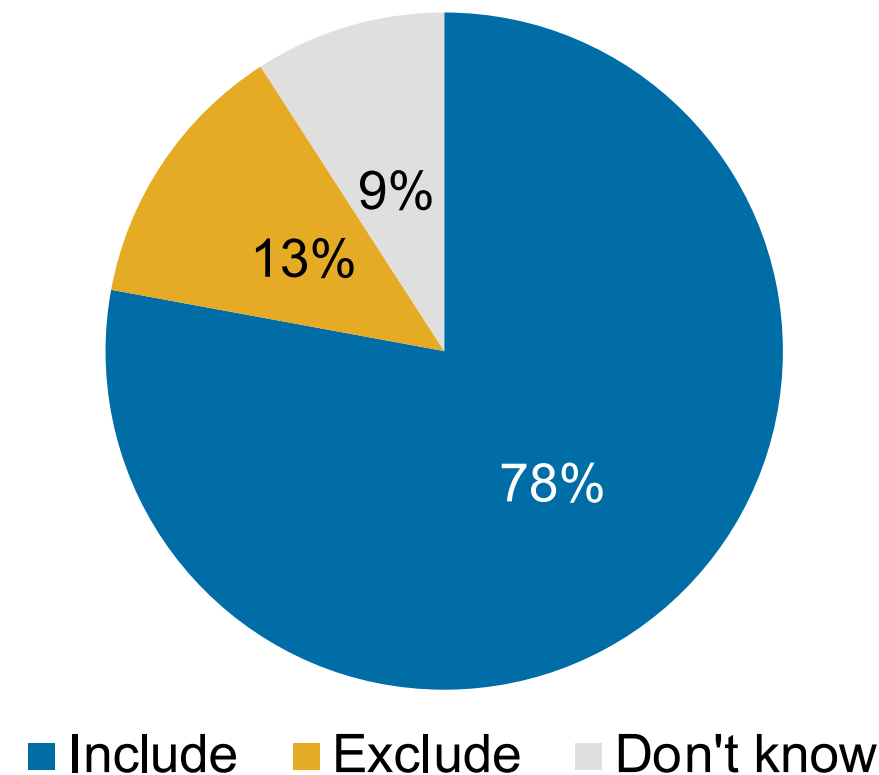
Depth interview

Although 'ingestibles' was added to the category after the second workshop, reverting back to just 'beauty supplement' might appeal to a wider range of stakeholders



Similarly, hygiene and personal care products are regarded as a grey area for the beauty industry

**Personal care and hygiene
(including cosmetic dental
care)**



- Personal care and hygiene is seen to be a broad category, where 'beauty' is not always the primary aim of the products
- Yet over three quarters think they should be included
 - 'Appearance' and 'presence' are thought to be one of the fundamental reasons for maintaining a basic level of hygiene
- And there is value in expanding the definition to include personal care and hygiene as they are so widely used

"I view beauty as an elevated level of grooming where basics like deodorant or dental care don't really fit unless they are products that [stand out] by their superiority."

Survey

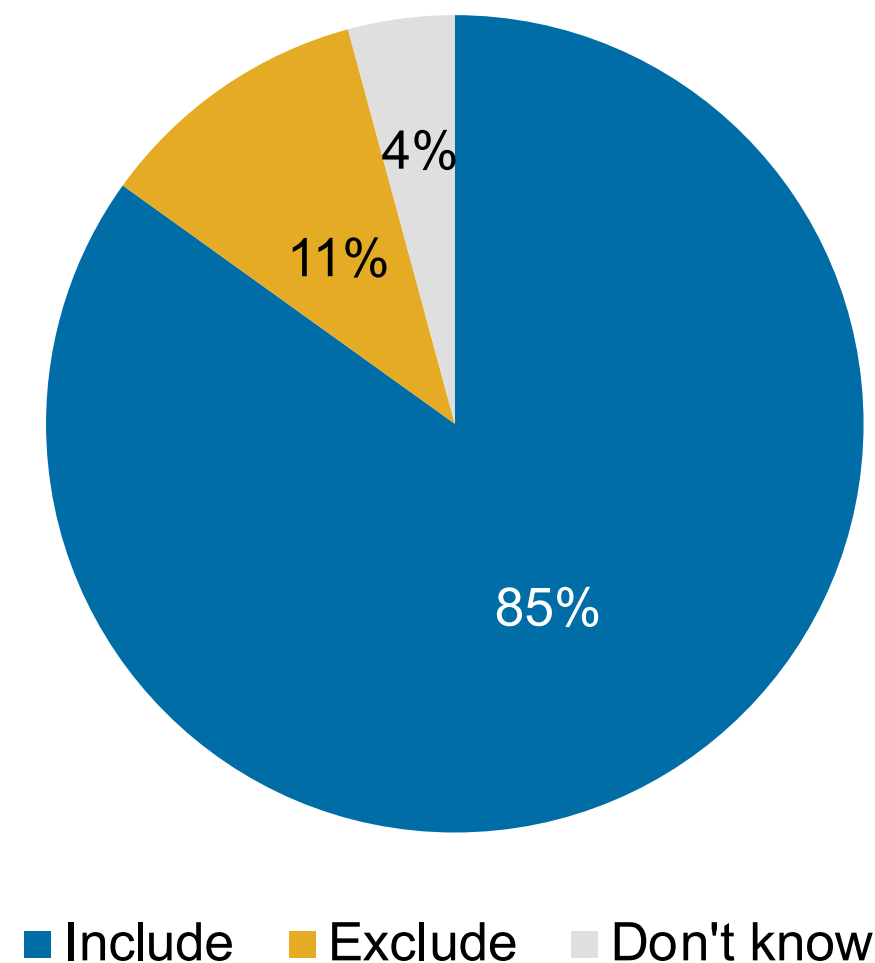
"Any foundational product – femcare, toothpaste, core essentials – I would introduce... You're trying to get how far reaching it is. The industry plays different roles around hygiene and premium, but the products are similar."

Workshop

For this reason, the reference to 'hygiene' was removed from the blurb for beauty and grooming products

And a small minority see 'hair' as a separate industry

Hair extensions and enhancements



- The vast majority accept without question that 'hair' is part of the beauty industry
- However a small minority feel that it should be kept separate, seen most clearly in the category of hair extensions and enhancements
 - And cite the difference in training that hair professionals receive compared to beauty professionals

"To be a fully trained Beautician you need a diploma in beauty and likewise to be a hairdresser therefore the British beauty council should only include beauty. Hair would fall under the British hairdressers council."

Survey

Keeping 'hair' in the definition is likely to be least controversial

**Stakeholders also hold strong views on
how products should be described**

Some stakeholders raise questions over the consumer vs professional perspective

- The definition puts a lot of emphasis on the consumer
- Some raise concerns that the products bought by consumers are different to those bought by professionals
 - This is particularly relevant for the categories of accessories and hair extensions/enhancements
 - E.g. Expensive machinery for certain services or products such as hair extensions that have to be administered by professionals
- They question whether these aspects are covered by the definition
- The category of 'accessories' is further debated as 'disposables' is seen to be a contentious topic in light of the industry's push for sustainability

"There should be a clearer distinction between a consumer product and a professional treatment. Acrylic/ gel nail and gel polish should not be available to consumers, neither should teeth whitening, or hair extensions."

Survey

"There are things that we buy that consumers can't. Imagine how much a laser hair removal machine costs - it's £80,000 for one machine. Those will be missed under the current definition, which is huge chunks of income."

Depth interview

"I feel it reads only to consumers - I work as a hair and makeup artist in the film industry so my services are not on consumers - they are professional services for actors, stunts and extras."

Survey

Clarification over whether expenditure by professionals is to be included could be added alongside the definition

The way that the products are worded and categorised is thought to muddy the definition



Cosmetics

- Cosmetics as a category is thought to cover many of the other items – some question if they need to be split out



Disposables/ electricals

- After the first workshop, disposables and electricals were folded into accessories, as it is felt unnecessary to list them out



Body care

- Although body care is included in the blurb, some point out that it does not appear on the list
- Others argue that skin, hair and nails are subcategories

“People don’t always think clearly about the difference between, for example, a beauty treatment and a beauty product.”

Depth interview

“There’s a mix of product terminology and body parts. So if you’re talking about body parts – you either clarify everything (nails, skin, lips, hair) [or you don’t]...either be very specific or very broad.”

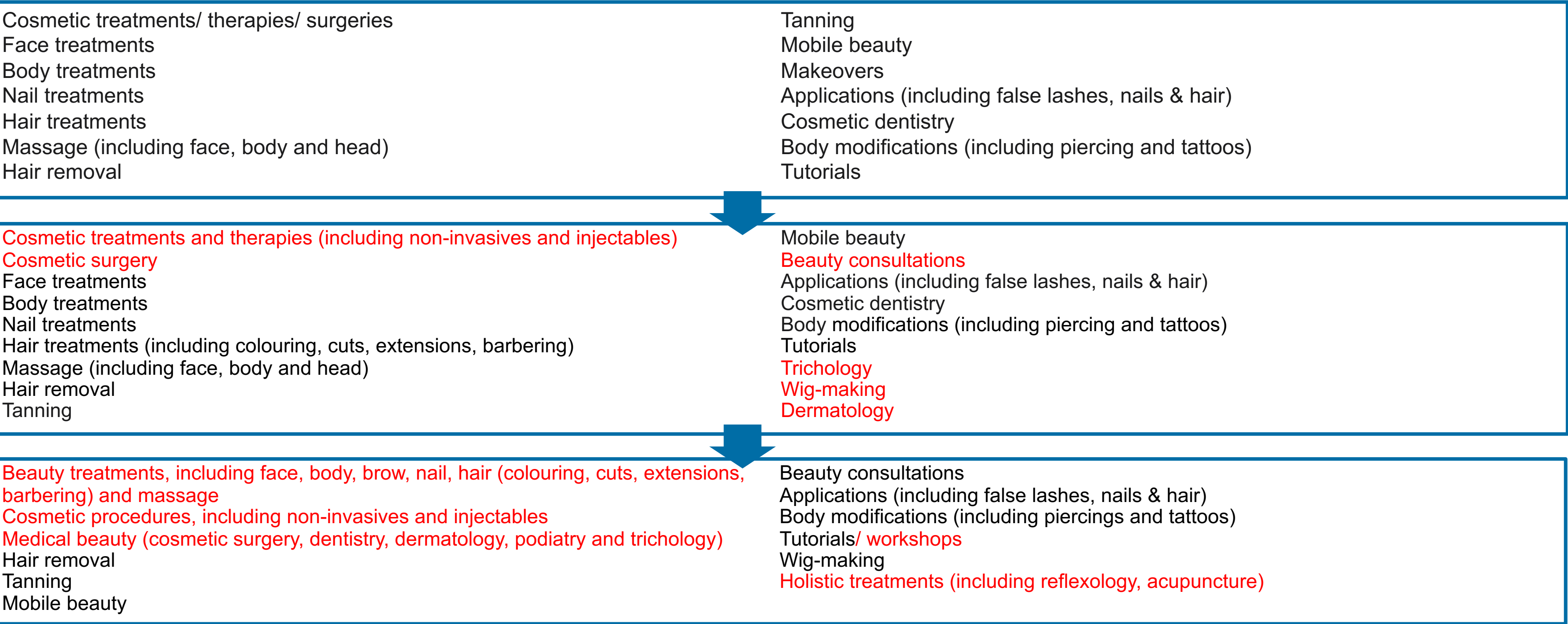
Depth interview

Precise wording and classification, perhaps using more overarching categories and sub-categories, would help to make the definition clearer

6

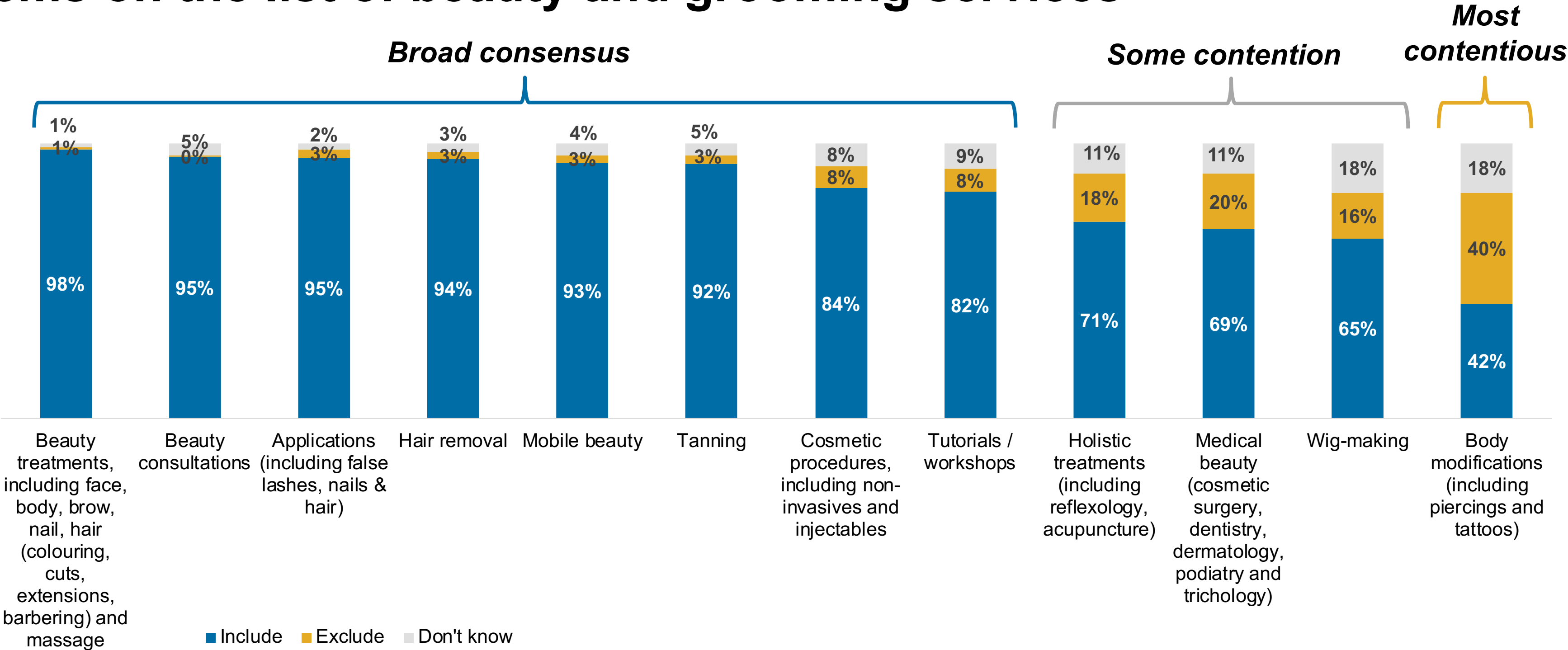
Definition: Beauty and grooming services

We tested and refined a list of beauty and grooming services



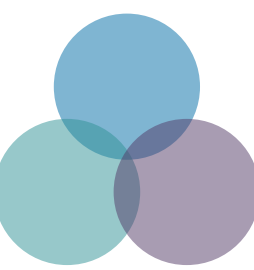
A clear majority of stakeholders support the inclusion of most items on the list of beauty and grooming services

A clear majority of stakeholders support the inclusion of most items on the list of beauty and grooming services



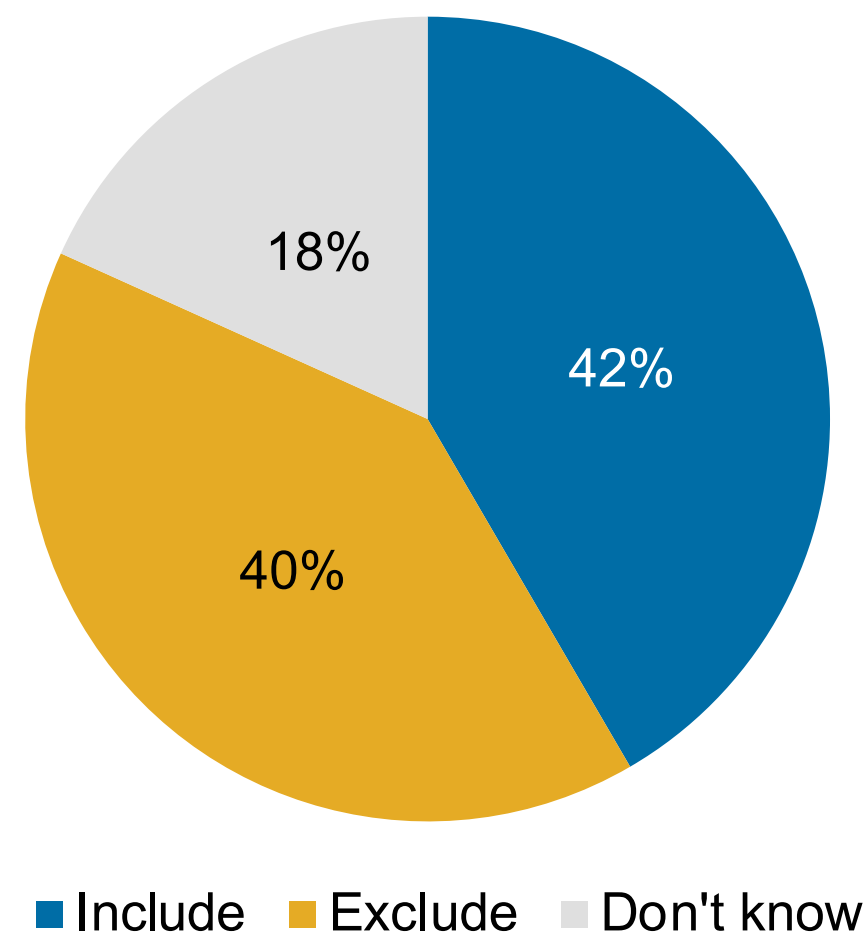
Q7. For each of the following, please say whether they should be included or excluded: Base: All respondents (n = 274)
Items that are excluded by 10% or more stakeholders are marked as 'some contention'. Items where less than 50% support inclusion have been marked as 'Most contentious'.

Fewer than half of stakeholders support the inclusion of body modifications among the list of beauty services



Body modifications and tattoos is highly controversial, with the survey showing a sharp divide

**Body modifications
(including piercings and
tattoos)**



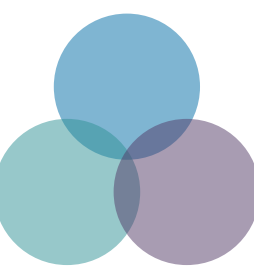
- Whilst some stakeholders readily accept body modifications as part of the beauty industry, others feel that they fall more under the ‘fashion’ industry – or exist in an industry of their own
 - And tattoo artists might even resent their inclusion in the beauty industry
 - For others, it is a question of personal taste and a feeling that it doesn’t enhance personal appearance
- There is recognition that permanent make-up and similar techniques complicate the matter – as these are seen to sit firmly in the beauty industry
 - E.g. there some call for eye-brow tattooing to be included
- While piercing in its more ‘extreme’ form is seen as lying outside the beauty sector, stakeholders are less certain over ear piercings, which often take place in beauty parlours

“I’d say eyebrow tattoos for cancer patients is beauty, having your nan’s face on your arm... not really.”
Workshop

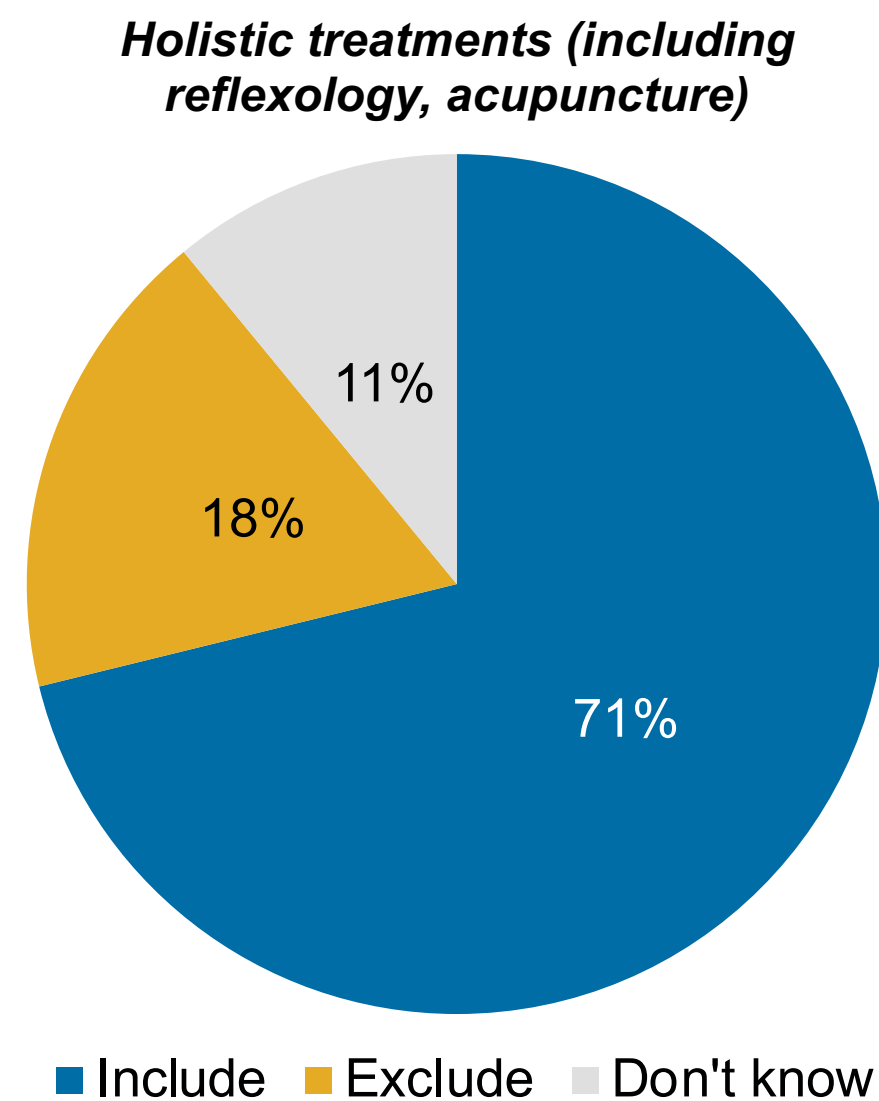
“Professional tattoo artists would tell you to jog on if you included them in the beauty industry.”
Workshop

“100% body modifications belong here...I’d hope [tattoo artists] would want to be included – I don’t know where else they would sit. It must be a huge revenue generator these days and it’s only going to get bigger in the future.”
Workshop

**Whilst a majority support their inclusion,
three services provoke further discussion
and some disagreement**



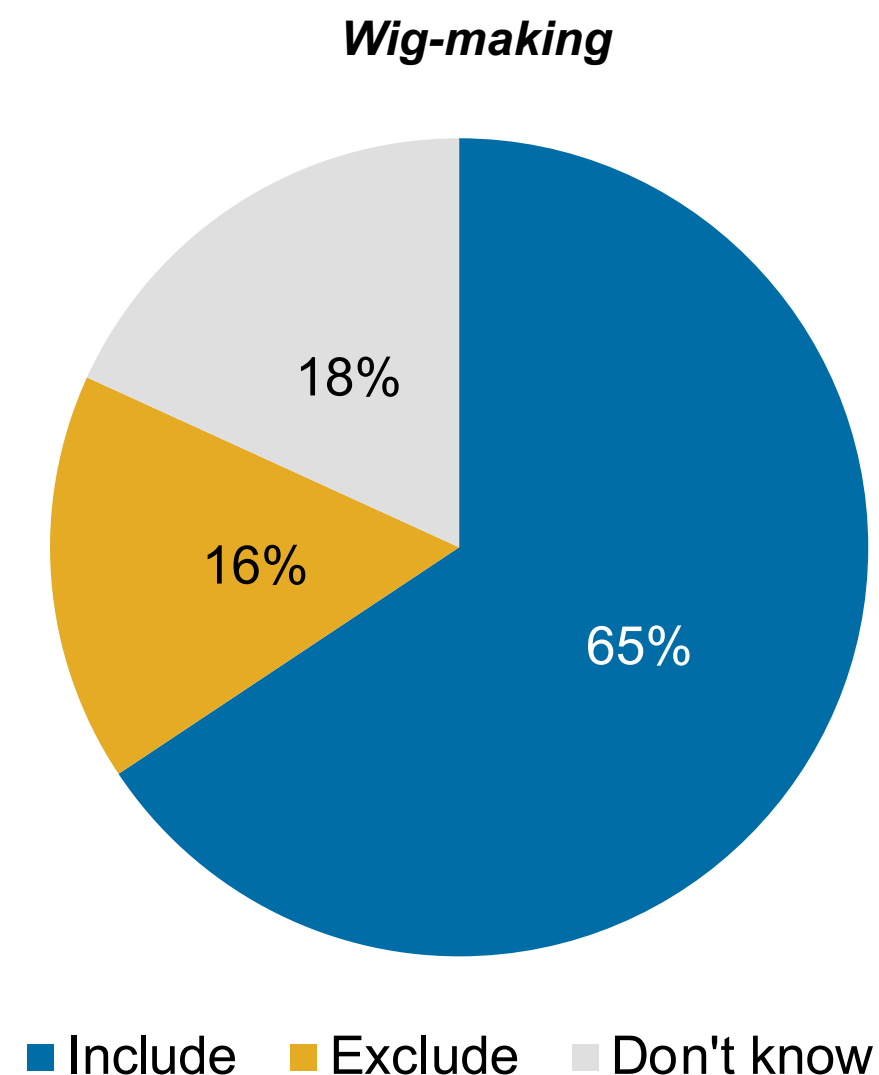
While a clear majority of stakeholders support the inclusion of holistic treatments, nearly a fifth disagree



- Over two thirds of stakeholders (71%) are in favour of its inclusion
 - Seen as an important category under the 'wellbeing' debate
 - Some stakeholders want to expand holistic treatments even further to include things like yoga or sleep therapy
- Yet just under a fifth (18%) want to exclude it
 - Some recognise that holistic treatments may be purchased as part of a beauty regime, but feel they sit firmly in other industries (health/wellness)

"Things like holistic treatments – someone's doing that not because they want to look better but because it's about the mindset. I like that is in there but I'm not sure it belongs under beauty."
Depth interview

While most agree wig making is a beauty service, a minority see 'hair' as a separate industry

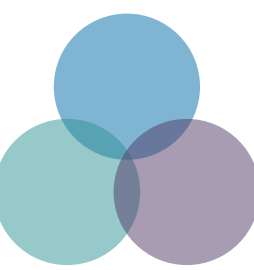


- As discussed above, the vast majority accept without question that 'hair' is part of the beauty industry
- As with 'hair extensions and enhancements', a minority say that wig-making should be excluded
 - And again cite the difference in training that hair professionals receive compared to beauty professionals

"I don't feel like hair should be associated within the beauty industry as is it a separate industry all together. Often I feel the two get merged together however they are completely different with different aspects of learning."

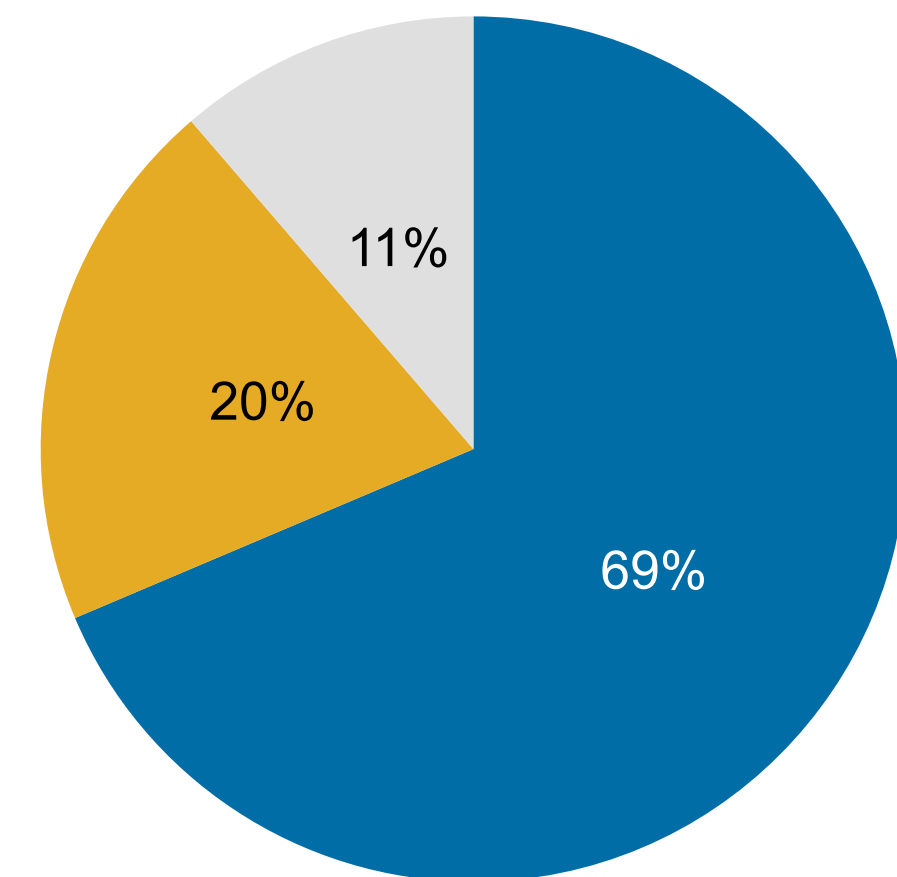
Survey

Keeping 'hair' in the definition is likely to be least controversial



Medical beauty services provoke strong feelings; many strongly support their inclusion, but a minority feel they should be removed

Medical beauty



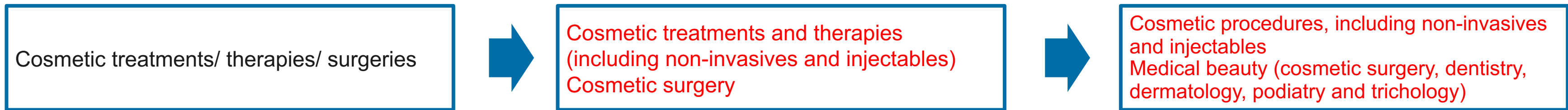
■ Include ■ Exclude ■ Don't know

- Those who are in favour firmly believe they fit the criteria of 'enhancing and/or maintaining personal appearance'
 - It is also seen to be an expanding market, growing in acceptance and popularity
- But one fifth object to the inclusion of medical beauty
 - Some feel it damages the reputation of the industry by focusing on surgery as a solution
 - And lack of regulation causes further problems
 - Others worry that it strays into the territory of medicine and health
 - Again there is a question of personal taste with some of the opinion that it doesn't enhance personal appearance

"On the cosmetic procedures - this does (for me) lie under a beauty treatment, however I do feel concern that this makes it less medical and more accessible as a throwaway fast fix style treatment, and not something that sits with surgery/ medical."

Survey

Even the way in which these medical services are worded sparks debate



- Stakeholders that are further from the medical beauty area find it difficult to settle on the terminology for cosmetic surgeries/ medical treatments
- Those that are closer have quite specific suggestions, e.g. ‘Medical aesthetic’
- Lack of consensus is partly a symptom of the disconnected industry with varying levels of regulation

“I would probably say it should be ‘medical and surgical procedures’, or ‘medical aesthetic’. Medical is the key, because there are procedures which can be carried out by beauticians, which could be classified as an aesthetic procedure, but with ‘medical’ it covers injectables, lasers, and surgery. Again, with cosmetic procedures, I’d define that better and say medical aesthetic procedures.

The UK is the only country to allow non-medical professionals to carry out medical aesthetic procedures. The politics of how the definition includes this needs to be clear.”

Depth interview

Stakeholders again hold strong views on how services should be described

As with products, the way that beauty services are worded and categorised is cause for further debate

Beauty treatments	Hair	Applications	Tutorials/ workshops
<ul style="list-style-type: none">Many stakeholders agree that beauty treatments should be grouped collectively, rather than separately, as in the first iteration of the definition	<ul style="list-style-type: none">Stakeholders suggested a number of additions for hair services, including trichology and wig-making. For later iterations, some suggest these should be grouped together under one category, along with hair removal and hair treatments	<ul style="list-style-type: none">Applications are felt to be contradictory, as if they are professional services purchased by consumers, these would be included in beauty treatments	<ul style="list-style-type: none">It is not always clear to stakeholders that tutorials and workshops are paid for services, as immediate associations are with vloggers etc.
<p><i>“It's interesting that wig making is separate from trichology. You could group it better - so you have something like a 'hair' category, with hair removal etc. It needs to be refined.”</i></p> <p>Depth interview</p>		<p><i>“The use of ‘treatments’ and ‘applications’ for nails is contradictory. If it is self application that is not part of professional services.”</i></p> <p>Survey</p>	
Precise wording and classification, perhaps using more overarching categories and sub-categories, would help to make the definition clearer			

And some point out inconsistency between the list of products and services

Products

Personal care/ maintenance <ul style="list-style-type: none">• Hair (including care, colour and styling)• Personal care and hygiene (including cosmetic dental care)• Skincare (including face, lips, feet, hands and body)• Suncare (including self-tan)• Hair removal• Nails (including care and colour)	Personal enhancement <ul style="list-style-type: none">• Cosmetics (make-up)• Accessories (including applicators, tools, disposables and electricals)• Applications (including false lashes and nails)• Hair extensions and enhancements• Personal fragrance / perfume (including ancillaries, bath and body)• Beauty supplements/ ingestibles
---	---

Felt to be missing:

- Wigs
- Products for eyebrows
- Substances used for medical beauty/ cosmetic procedures
- Body care products

Services

Beauty treatments, including face, body, brow, nail, hair (colouring, cuts, extensions, barbering) and massage	Applications (including false lashes, nails & hair)
Cosmetic procedures, including non-invasives and injectables	Body modifications (including piercings and tattoos)
Medical beauty (cosmetic surgery, dentistry, dermatology, podiatry and trichology)	Tutorials / workshops
Hair removal	Wig-making
Tanning	Holistic treatments (including and reflexology, acupuncture)
Mobile beauty	
Beauty consultations	

Felt to be missing:

- Nutritionists/ beauty supplement specialists

Finally, there are calls for the list of products and services to represent minorities as well

- Some stakeholders cite the diversity and inclusivity of the beauty industry as a real strength
- And therefore question why the definition does not explicitly reference the practices that are specific to minority groups

“[The definition] should consider how to reflect either gender specific or non-gender specific products and services, and transgender usage.”

Survey

“Perhaps make it explicitly clear that BBC encompasses and will represent all of the facets of the UK beauty industry including considerations for black and ethnic minorities.”

Survey

“Representation of ethnic community beauty/ grooming rituals (henna, threading etc).”

Survey

The definition could include some products and services that are more specific to certain ethnic minorities or genders

7 Definition: Enabled activities

We also tested a list of ‘enabled activities’

Enabled activities

Enabled activities will include a variety of services, which are ultimately financed by the expenditure described under Beauty Products and Services. For the purposes of this study, where possible, we will attempt to estimate the value sustained by these activities individually as part of the sector’s direct foot-print.

- Advertising (including print and digital)
Marketing and branding
Design and brand development (including designers and agencies)
Print and digital journalism
Photography and videography
Stylists
Digital influencers
Social media managers
Retail sales (including beauty advisors, merchandisers, in-store sales)
PR
Event organisers
Session and backstage stylists (including makeup, nails and hair)
Fashion (including runway)
- Education and training
Wholesale (including account managers and buyers)
Distribution (including retail and professional outlets, field sales)
Model agents / models
Film and TV (including beauty presenters)
- Tech (including software, ESPs, CRM ops and website creators)
Booking providers
Investors and investment brokers
Professional services (including legal, accounting and consulting)
Retail shopfit (including design and manufacture)
Customer support and services
Manufacturers (including full service and third party)
Fragrance houses, compound houses and perfumers
Printing
Ingredient suppliers
Logistics and fulfilment companies
Raw materials (including materials, chemicals and energy)
Ideation and design
- Tech innovation
Scientific
Copywriting
Chemists and lab technicians / formulators
Componentry and packaging suppliers
Warehousing

The list of enabled activities is warmly received

- Stakeholders broadly agree with the draft list of enabled activities and there is positivity towards the idea of measuring how big an impact the beauty industry has
- Areas felt to be particularly important include:



Suggested additions to the enabled activities cover a broad area

Real Estate

Because of the beauty industry's strong presence on the high street, there is a knock-on effect for real estate in the area

Pharmaceuticals

Including pharmaceuticals in enabled activities could mitigate the issue of excluding the more controversial items from beauty and grooming products

Sustainability/ CSR

There is felt to be a strong push towards a sustainable and clean beauty industry, which has a knock-on effect for the services/ manufacturers etc. that specialise in it

Music

All creative industries are felt to rely on each other, and beauty is therefore a pillar of the fashion, TV, advertising industries; yet music is felt to be left out

Charities

E.g. Look Good Feel Better

Research and Development

Some feel there is not enough emphasis on the R&D, including formulators, cosmetic scientists, testing laboratories

But there is confusion over how the impact report works

- Confusion over how the impact report would work in practice makes it difficult for stakeholders to assess what should and shouldn't be included
 - For example, some feel strongly that logistics, such as delivery and fulfilment, should be included, whereas others feel this should and would be covered in the economic impact assessment of products and services
 - Others question where B2B relations are covered, e.g. booking platforms and self-employed sales representatives

“This is probably quite a tough job to determine what impact we have on all these industries. I mean we are going to have a knock-on effect on everything here. I agree with all these things but the list could go on and on. The fact that you’ve got fashion and runway – that’s so open – we go hand in hand with fashion.”

Depth interview

In light of Oxford Economics’ explanation, we recommend a comprehensive review of the list of enabled activities to identify those that would be covered by the economic valuation, e.g. marketing and branding, fragrance houses, professional staff

8

Recommendations

Recommendations

1

Although there is widespread support for the current definition, it will not be *universally* accepted in its entirety. The British Beauty Council needs to take a strategic decision about what should be included.

2

Whilst it is important for the blurb to remain broad and inclusive, the list of products and services should be specific and precise to achieve its aim.

3

There is an argument for removing the most contentious categories from the definition, namely body modifications.

4

It is worthwhile revisiting the lists to ensure there is consistency and precise wording throughout the definition: between products and services, between categories and sub-categories – including the terminology around medical beauty.

5

The list of enabled activities should be comprehensively reviewed to ensure it is serving its purpose and not overlapping with the economic valuation.

9 Response

As a result of this piece of research, the definition has been finalised in consultation with the British Beauty Council

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 wellbeing. They will include categories such as cosmetics, skin, hair and body care, personal care and hygiene products, accessories and applications.

PERSONAL CARE/MAINTENANCE

- Hair (including care and styling) (trichology and beard grooming)
- Personal care and hygiene (including cosmetic dental care)
- Skin and bodycare (including face, lips, feet, hands and brows)
- Suncare (including self-tan)
- Hair removal (shaving, waxing, laser, depilatory)
- Nail care

PERSONAL ENHANCEMENT

- Cosmetics (make-up)
- Nail colour
- Accessories (including applicators, tools, disposables and electricals)
- Applications (including false lashes and nails)
- Hair colour, relaxers and other chemical services, extensions, wigs and enhancements
- Personal fragrance/perfume (including ancillaries, bath and body)
- Beauty supplements/ingestibles

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 wellbeing. They will include categories such as treatments and tutorials for hair, nails, face and body, and cosmetic and surgical procedures.

- Beauty treatments, including face, body, brow, lashes, feet and nails
- Hair services, including colour, perms, relaxing and other chemical services, cuts, extensions, barbering, wigs
- Cosmetic procedures, including non-invasives and injectables
- Medical beauty (cosmetic surgery, dentistry, dermatology, trichology, hair transplants and hair loss)
- Hair removal
- Tanning
- Mobile beauty
- Beauty consultations
- Permanent make-up
- Tutorials/workshops
- Holistic treatments (including massage, reflexology, acupuncture)

Thank you

For more information:

Anastasia Knox, Catrin Nichols, Andrew Robinson

+44 (0)207 8455880

aknox@britainthinks.com, cnichols@britainthinks.com, arobinson@britainthinks.com

BritainThinks

Somerset House

Strand

London

WC2R 1LA

britainthinks.com