

BRITISH BEAUTY COUNCIL

THE IMPACT OF BEAUTY

Revealing its Social, Cultural,
and Economic Value

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A report for the British Beauty Council
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SEPTEMBER 2026

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SEPTEMBER 2026

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ABOUT BRITISH BEAUTY COUNCIL

The British Beauty Council is a not-for-profit organisation that represents all sectors of the UK Beauty Industry and collaborates with government and industry leaders to tackle key challenges and drive meaningful change.

Since its inception in 2018, the British Beauty Council has proven itself as the champion of the beauty industry, providing support to hundreds of thousands of workers and businesses. We work with various global economic, strategy and insight experts, including Oxford Economics, to value and detail the beauty industry—confirming influential statistics including the size of workforce and total contribution to UK GDP.

Understanding the value and contribution of our industry enables us to have a strong voice at the table to champion the issues that matter.

Despite its resilience and consistent growth, the beauty industry like so many industries is facing challenges in these troubling times.

By collaborating with a diverse network of patrons, affiliates and members, the British Beauty Council tackles the most pressing industry issues so that every sector within the industry can thrive.

Our work encompassed five main pillars in 2026: Policy & Influence, Talent & Careers, Trade & Export and Investment, Innovation & Technology.

1. Trade & Export The Trade & Export pillar is dedicated to driving the domestic and international growth of all beauty businesses and sole traders across the UK. With UK beauty exports contributing £4.2bn annually, the initiative addresses critical trade barriers such as Brexit impacts and US tariffs that disproportionately affect SMEs. The British Beauty Council actively supports the sector through export readiness initiatives, trade missions, market intelligence, and dedicated online trade hubs. Additionally, it works to streamline complex regulatory and administrative burdens by lobbying for technological solutions for digital product passports, labelling, and tax reform.

2. Skills & Talent Focused on standardizing education and nurturing the beauty workforce, the Skills & Talent pillar bridges critical gaps across careers, schools, higher education, and apprenticeships. Although the industry supports nearly 600,000 jobs, it faces persistent recruitment challenges and high drop-off rates from further education courses. The Council combats these issues through flagship programs like the Future Talent

Programme, the Skin School Creator Collective, and direct partnerships with government departments. By promoting clear career pathways, hair equity, and aesthetic practitioner standards, this pillar equips the next generation with the tools needed for long-term professional growth.

3. Innovation & Technology: Recognizing that beauty encompasses complex fields like chemistry, biotech, AI, diagnostics, and sustainable packaging, this pillar positions the UK at the cutting edge of science and tech. It brings together universities, formulators, AI firms, manufacturers, and investors into a collaborative Beauty Innovation Network. Key initiatives include environmental benchmarks like the Planet Positive Beauty Guide, the Packaging Solutions Summit, and “The Beauty Clean Up”. Through these efforts, the Council accelerates the industry's creative and technological output while addressing supply chain and digital compliance challenges.

4. Investment & Industrial Growth The Investment & Industrial Growth pillar highlights the sector's vital £28.3bn GDP contribution, proving beauty is a powerhouse for economic, social, and high-street vitality. Salon and retail footprints act as crucial high-street anchors, driving footfall and supporting surrounding local businesses across 60% of UK communities. The pillar fosters British enterprise by championing female-led businesses, boosting youth employment, and encouraging the reshoring of British manufacturing. Through data-driven insights and targeted funds like the Venrex x BBCo1 Investment Fund, it empowers beauty businesses to become fully investment-ready.

5. Policy & Influence As the strategic delivery partner for the UK's beauty economy, Policy & Influence bridges the gap between the sector and top-level government policy. It spearheads national missions to establish formal government-industry partnerships across key departments, including the Department for Business, Innovation, Science and Trade (BIST) and the Department for Education (DfE). By managing dedicated coalitions, advisory committees, and the All-Party Parliamentary Group (APPG) Secretariat, the Council gives beauty a unified voice in Parliament. Ultimately, this pillar ensures the industry's social, economic, and cultural impacts are recognized, positioning Britain as the global home of beauty.

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EXECUTIVE SUMMARY

Beauty and personal care is a major UK economic sector with a broad and far-reaching contribution to the economy and society. That contribution extends beyond its retail and service businesses to include the everyday role that beauty and personal care products play in consumers’ lives. Previous Oxford Economics Value of Beauty research shows that in 2025 the sector supported a total contribution of £28.3 billion to UK GDP, supported 595,000 jobs, and supported £8.8 billion in tax revenues.

This report builds on that evidence by examining the sector’s broader value to people and places. Drawing on a nationally representative consumer survey and a novel geospatial analysis, it explores how beauty and personal care shapes personal wellbeing, supports social connection, and contributes to the vitality of high streets and local economies across the UK. In doing so, it considers two themes in particular: a **nationwide sector with local footprint**, and **powering participation**.

- The report finds evidence of a **nationwide sector with a local footprint**. Beauty and personal care has a broad geographic presence across the UK, with a visible footprint in high streets and town centres in communities nationwide. In these places, the sector supports businesses, jobs, and skills, while also contributing to footfall and nearby consumer spending. This makes its economic and social presence tangible across local areas and parliamentary constituencies.
- The findings indicate beauty’s broader contribution, not just what the industry produces but what it makes possible with increased confidence **powering participation** in social and professional settings.

BEAUTY AND PERSONAL CARE IS A NECESSITY FOR BRITISH CONSUMERS

For many households, beauty and personal care occupies a stable and prioritised place in day-to-day spending. Relative to other common categories of discretionary spending, consumers rank beauty and personal care’s importance above gym and fitness memberships, streaming subscriptions, and eating out, and roughly alongside clothing and fashion. Just around one in five respondents describe it as more of a treat than a necessity, and only 7% describe it as entirely a treat.

Usage patterns reinforce that point. Beauty and personal care is widespread, habitual, and integrated into daily routines across the population. Survey respondents spend an average of 13 minutes a day on beauty and personal care and report average monthly spending of £27 on products and services. Frequent users spend £35 a month on average on beauty and personal care products and services, reflecting the greater role that beauty and personal care plays in the routines of those who engage with the sector most regularly.¹ More than half spend over £10 a month, and around one in four spend £25 or more. Product use is similarly routine: more than half of adults use skincare every day or most days, while hair and barbering is the most commonly used service, with the average adult visiting a barber or hairdresser roughly every two months.

CONNECTION, COMMUNITY, AND THE HIGH STREET

Beauty and personal care services offer more than a practical function. For many people, hair and beauty salons, barbershops, cosmetics stores and beauty retailers and other personal care services and retail settings provide regular, trusted spaces for interaction, conversation, and care. Among frequent users, 44% report having had a meaningful conversation with a personal care service provider in the past six months, while 42% say they have discussed personal matters, life events, or concerns. These findings point to the role these spaces can play as informal settings for open conversation and valuable social connection.

For some groups, these services also help fill gaps in day-to-day social contact. Nearly one in five (18%) frequent users say that, in some weeks, visiting a personal care provider is one of the few times they interact with other people. This share rises notably among young adults, suggesting that such services can act as small but meaningful pieces of social infrastructure in everyday life.

Beauty and personal care businesses also support local economic vitality in ways that distinguish them from many other consumer sectors. More than half (55%) of respondents’ most recent appointments took place on a high street or in a town centre, and in the large majority of these (86%) cases the appointment was the main reason for the visit. Personal care businesses are therefore not simply benefitting from existing footfall; they are helping to create it. Half of these visits are also accompanied by additional spending at nearby businesses, underlining the sector’s role in supporting local retail, hospitality, and service activity.

That role is national in scale with more than 190,000 beauty and personal care establishments around the country. But it is strongly local at the same time and is especially visible in smaller centres. Personal care and beauty services and retailers account for almost a third of all leisure and recreation amenities across UK retail zones, with their importance rising in smaller high streets. In many small local centres, they make up more than 35% of the local leisure and recreation offer. In small high streets, hair and beauty salons alone account for around 20% of leisure amenities, which is the same share as pubs, bars and cafés combined.

Whilst London has the largest absolute number of amenities, that largely reflects its size. The sector’s importance extends far beyond the capital with 39% of amenities found outside large cities. On a per-head basis, many areas outside London are as well served or better served, and in smaller towns, villages, and lower-density communities, beauty and personal care often makes up one of the largest shares of the local leisure mix. For example, parts of Glasgow, Manchester, Leeds, Edinburgh, Norwich, Aberdeen, and other cities in the UK, enjoy a considerably higher per capita concentration of beauty amenities compared to many parts of London.

In many places, beauty salons, barbershops, nail bars and beauty retailers are key reasons to visit the local high street and among the few remaining settings for regular, unhurried, face-to-face interaction. Beauty and personal care helps maintain the high street as a physical hub for everyday economic and social activity. The sector also supports forms of in-person service employment that are rooted in local communities and less readily displaced by automation. Beauty and personal care therefore contributes not only to commerce, but also to local vibrancy, community connection, and the resilience of town centres.



In 50% of cases, visits to the high street for the purpose of a personal care appointment are accompanied by additional spending at nearby businesses.

¹ Frequent users are defined as those who meet a minimum threshold with respect to usage of personal care products and services, expenditure on those products and services, and time spent on personal care as part of their daily routine.

THE WELLBEING EFFECTS OF BEAUTY IN EVERYDAY LIFE

Beauty and personal care has a major effect on how many people feel. Among frequent users, three-quarters say that using personal care products and services has a positive impact on how they feel about themselves. This effect is particularly strong among women (81%), but it is also reported by two-thirds of men, and it is evident across income levels and socioeconomic groups. The sector's relevance to wellbeing is therefore broad-based rather than concentrated in a narrow part of the population.

Confidence is one of the clearest channels through which this effect operates. 45% of frequent users say they would not feel as confident about their appearance without using personal care products and services, and a similar share (48%) say beauty helps them feel more resilient when facing daily challenges. The role of beauty and personal care therefore extends beyond outward appearance to include a stronger sense of readiness, assurance, and emotional steadiness in everyday life. Mood also emerges as an important dimension, with around half of frequent users (52%) saying that their personal care or grooming routine helps improve their mood.

These effects carry through into participation in both social and professional settings. A majority of frequent users (64%) say they enjoy social occasions more when they feel good about their appearance, and more than half (54%) say that feeling good about their appearance makes them more willing to attend such occasions in the first place. In professional contexts, 51% say that taking care of their appearance helps them feel more confident and 56% say that it supports them in making a positive first impression in the workplace. Beauty and personal care can therefore shape not only internal feelings of wellbeing, but also how people show up for moments that matter in everyday life.

For many users, beauty and personal care also supports identity and self-expression. Around four in 10 frequent users say that their routine reinforces their sense of self, while just over a quarter say it gives them an opportunity to be creative and experiment with their appearance. These effects are especially pronounced among younger adults, suggesting that for groups such as this the role of beauty extends beyond maintenance and presentation to include experimentation, identity formation, and self-expression.

KEY TAKEAWAYS

Our analysis clearly suggests that beauty and personal care makes a broader contribution to UK society than standard economic metrics alone capture. It is part of how people prepare for the day, participate in work and social life, and feel more confident and resilient in the face of daily pressures. It provides trusted spaces for conversation and connection, helping to reduce isolation and sustain community ties. It also plays a practical economic role by anchoring high streets, generating footfall, and supporting spending in surrounding businesses.

Beauty and personal care should therefore be understood not only as an important consumer sector providing valuable products, but also as part of the everyday infrastructure through which personal wellbeing, social connection, and local economic vitality are sustained. Its value lies not only in what it produces and sells, but in what it enables: stronger confidence, stronger communities, and more vibrant local centres across the UK.

SECTION 1

INTRODUCTION: THE BROADER VALUE OF BEAUTY

Beyond beauty's substantial economic impact, adding billions to UK GDP, supporting hundreds of thousands of jobs, and sustaining supply chains in every region of the UK, the sector also delivers significant social value. Beauty and personal care shape how people feel about themselves, how they connect with others, and how they participate in professional and personal life with confidence and agency.

This combination of economic scale and social impact makes the sector unusual. Its contribution has been documented across successive Value of Beauty reports and recently formally recognised when an individual statistical classification was introduced to measure the sector's activity.² Yet headline economic figures capture only part of the story. They show the size of the sector, but not the fuller role it plays in everyday life.

This report sets out to examine that wider impact. Drawing on evidence from a consumer survey and a novel geospatial analysis, we explore how beauty and personal care products and services support wellbeing, strengthen social connection, and generate benefits that extend beyond the economy.

1.1 THE SOCIAL VALUE OF BEAUTY

The economic case for beauty is now firmly on the record. In 2025, the industry supported a total contribution of £28.3 billion to UK GDP, supported a total of 595000 workers across manufacturing, retail and services, and supported a total of £8.8billion in tax revenues to the Exchequer.³ The question for this report is what the sector contributes beyond GDP.

For many consumers, beauty and personal care products and services form part of how they manage their own wellbeing, maintain confidence, prepare for important moments, and express identity. The value of a purchase or appointment often lies not only in the immediate service provided, but also in the effects that follow: reduced stress, greater self-assurance, and a stronger sense of readiness for work and social interaction.

This matters because wellbeing now occupies a more central place in UK policy appraisal. Since the Office for National Statistics launched its Measuring National Well-being programme in 2010, policymakers have placed greater emphasis on understanding lived experience alongside economic outcomes.⁴ More recently, HM Treasury's Green Book has provided guidance on incorporating potential wellbeing impacts into policy making processes, allowing these impacts to be considered more directly in spending decisions.⁵

² British Beauty Council, 'A Landmark Moment For Our Industry: New SIC Codes for Hair, Beauty and Spa Are Announced'. March 2026.
³ British Beauty Council & Oxford Economics, "The Value of Beauty 2026", last accessed August 2026.
⁴ ONS, 'UK Measures of National Well-being Dashboard'. Last accessed August 2026.
⁵ UK Government, 'Greenbook supplementary guidance: wellbeing'. Last accessed August 2026.

The sector’s social value also has a regional and local dimension. Beauty businesses are embedded in the fabric of towns, cities, and local centres across the UK. Salons, barbershops, nail bars, and clinics occupy high streets and neighbourhood parades in communities of every type. Their role has become more visible as other high street activities have come under pressure from online competition and rising vacancies. Because beauty services must be delivered in person, these businesses help to generate footfall, support nearby establishments, and sustain the vitality of local centres. Beauty retailers also represent a cornerstone of the British high street as the consumer journey is built around trial, advice, and staff interaction. With high street renewal now a policy priority, understanding this contribution is increasingly important.⁶

1.2 UNDERSTANDING WELLBEING

Wellbeing is a multi-faceted concept which, for different people, means different things and has different drivers. In a UK policy context, the Office for National Statistics’ National Wellbeing Framework provides a common structure to think about what determines the wellbeing of the UK population.⁷ It comprises of 10 distinct domains and provides a helpful structure to understand how beauty can influence wellbeing at an individual and societal level. Figure 1 presents a subset of the most relevant national wellbeing domains and describes how the beauty sector can influence these.

FIGURE 1: SELECTED ONS NATIONAL WELLBEING DOMAINS, AND HOW THE BEAUTY SECTOR CAN AFFECT THEM⁸

Source: Oxford Economics; Office for National Statistics

ONS wellbeing domain	Definition	How the beauty sector plays a role
Personal wellbeing	How (un)happy people are and how they feel about their lives	Multi-faceted role, explored in Section 4.
Health	Physical and mental health	Products and services enable people to take care of their hygiene, skin health, and appearance with a positive impact on mental health (explored in Section 4).
Where we live	The quality of the local area, community, and sense of belonging	Beauty service providers and beauty retailers are a core feature of high streets and town centres, providing vibrancy and driving footfall to these areas (explored in Section 4).
Our relationships	The quantity and quality of people’s social connections, and extent of loneliness	Service providers offer opportunities for regular, trust-based contact and connection (explored in Section 4).
The economy	The health of the national economy, including household income, inflation, and public finances	A £28.3 billion contribution to GDP in 2025; and an almost £9 billion tax contribution. ⁹
What we do	How people spend their time across paid and unpaid work, and leisure	Supports confidence to act in personal and professional settings (explored in Section 4). Supported around 600,000 jobs in 2025 across services, manufacturing, wholesale, and retail. ¹⁰
Education and skills	Extent to which the population has appropriate qualifications and skills	Offers a vocational training route, with 77,000 qualifications completed in the 2021/22 academic year alone. ¹¹

6 UK Parliament, ‘Revitalising High Streets Inquiry’. Last accessed August 2026.
7 Office for National Statistics, “UK Measure of National Well-being framework user guide”, last accessed August 2026.
8 The other three domains not included are: governance, the environment, and personal finance
9 British Beauty Council & Oxford Economics, “The Value of Beauty 2026”, last accessed August 2026.
10 As previous footnote.
11 British Beauty Council & Oxford Economics, “The Value of Beauty 2023”, last accessed August 2026

1.3 THIS REPORT

We explore whether using personal care products and services and the places that provide them make a measurable difference to people’s wellbeing and to the communities they sit in.

Our evidence base and approach consist of:

- A **primary survey of consumers** looking at who uses beauty and how, as well as how products, services, and routines affect wellbeing, self-identity, mood, and social connection.
- A novel **geospatial analysis** exploring where personal care establishments sit across the UK and how central they are to high streets and local amenity mixes.
- Supporting **secondary evidence**, such as Oxford Economics’ previous Value of Beauty updates and wider published research used to corroborate and to translate the wellbeing findings into economic and policy relevance in the conclusion.

The rest of the report is structured as follows:

- **Section 2** presents the consumer view, discussing how consumers use beauty and personal care products and services and what value they place on them.
- **Section 3** discusses the sector’s role in providing connection, supporting communities and adding vibrancy to British high streets.
- **Section 4** explores the dimensions through which beauty and personal care impact wellbeing.
- **Section 5** provides concluding remarks.
- **Appendix 1** presents the consumer profiles identified in the survey analysis.
- **Appendix 2** contains the methodological detail behind the geospatial analysis.
- **Appendix 3** presents findings from the geospatial analysis at the parliamentary constituency level.

SECTION 2

THE CONSUMER VIEW: HOW PEOPLE USE AND VALUE BEAUTY

2.1 HOW PEOPLE USE BEAUTY PRODUCTS AND SERVICES

Beauty and personal care are deeply embedded in many consumers' everyday lives. Routines can encompass a wide range of products and services and form a regular part of how people care for, maintain, and express themselves.

Drawing on a new survey of the UK population (see Box), this chapter examines the scale and regularity of this engagement across three dimensions: what products and services consumers use; how much time they dedicate to their routines; and how much they spend each month. Together, these measures provide an overview of consumption patterns, establishing the scale and nature of consumers' engagement with beauty and personal care and laying the foundation for the remaining chapters in this report which explore how this engagement translates into wider wellbeing outcomes.

About the survey analysis

Oxford Economics commissioned YouGov plc to conduct a nationally representative survey of 2,116 UK adults. The survey fieldwork was carried out online in July 2026. The survey was designed by Oxford Economics in collaboration with the British Beauty Council and reviewed by YouGov plc. Respondents were asked about their use of personal care products and services, the effects they attribute to that use, and the priority they give to personal care within household spending. Base sizes vary by question, as some questions were asked only of relevant respondents.

In section two, we analyse product and service usage and the amount of time and money people spend on their personal care routine for the full nationally representative sample.

Sections three and four draw on a subgroup of respondents who use personal care products and services more frequently, and/or spend more time or money on them ('frequent users'), comprising 72% of the sample. This keeps the analysis rooted in the experience of most consumers while ensuring findings come from those with enough exposure to comment meaningfully.

Full details on how we defined frequent users using consumer profiles can be found in in the Appendix.

2.1.1 PRODUCT USE

Beauty and personal care products are a part of everyday life, with basic hygiene products, such as toothpaste, deodorant, and body wash, forming an essential component of almost all consumers' daily routines.¹²

But beauty and personal care products extend far beyond basic hygiene. They include skincare, fragrance, sun protection, electrical appliances,¹³ make-up, hair care, and more. As part of our nationally representative consumer survey, we asked individuals how frequently they used several of the most common categories of beauty and personal care product.

Survey respondents reported using different types of product with much different degrees of frequency.¹⁴ Skincare is the most habitual: just over half of all adults use moisturisers, cleansers, or similar products every day or most days. Fragrance follows as the product category that is second most commonly used on a daily basis by around four in 10 adults.

Some product categories see less frequent use, whilst still being used by the majority of the population at least occasionally. Electrical appliances such as hairdryers and shavers are used on at least a monthly basis by nearly seven in 10 adults.¹⁵ Sun protection and hair products follow a similar pattern, used on at least a monthly basis by 56% and 46% of the UK population, respectively. For some products such as sun protection, lower frequency may not mean lower importance but, for example, a seasonal pattern of use.

Gender is an important determinant of usage patterns. The largest difference between genders exists in make-up, with more than half (53%) of women using make-up at least weekly compared to roughly one in every 30 men (3%).¹⁶ Thus, beauty and personal care product consumption patterns can vary across different groups of the population.



Over half of all adults (52%) use skincare daily.

12 For example, separate survey evidence from YouGov finds that 95% of UK adults brush their teeth at least once a day and 79% apply deodorant at least once a day. YouGov, 'How clean are Brits? New YouGov survey reveals hygiene habits'. April 2025.

13 Electrical appliances include products such as hairdryers, shavers and styling tools.

14 Survey respondents were asked to report their product usage and frequency for the following product categories: skin-care, fragrance, sun protection, electrical appliances, make-up, hair products.

15 The frequency 'at least on a monthly basis' was obtained by aggregating the following options from the survey: 'every day or most days', '1 to 3 days a week', 'once every 2 weeks' and 'once a month'.

16 The frequency 'at least weekly' was obtained by aggregating the following options from the survey: 'every day or most days', '1 to 3 days a week'



The average British adult visits their hairdresser or barber every two months.

2.1.2 SERVICE USE

Services exist to support personal care, health and wellbeing on a periodic basis, which is reflected in their frequency of use.¹⁷

Hair and barbering is the most widely used service, with the average UK adult visiting their hairdresser or barber every two months.¹⁸ A third of adults book a hair or barber appointment every two to three months and a further 17% at least monthly, so half the population uses the service at least once every three months (53%).¹⁹ Only two in 10 adults said they never visit a hairdresser or barber. Men use this service more often, with 30% of them going at least monthly compared to 10% of women.²⁰ Nail services are the next most regular, used at least monthly by 9% of adults, rising to 13% among women.

At the other end of the range sit the more specialised treatments. Frequency of usage figures for body treatments and other cosmetic treatments such as dermatology are lower, reflect their more specialised and less routine nature. Holistic treatments including massage and reflexology fall in between, with nearly four in 10 reporting that they use them.

Service use is therefore closely tied to purpose. Maintenance-led services such as haircuts and manicures recur on a predictable cycle, while specialised or experiential treatments are used selectively.

2.1.3 BEAUTY AND PERSONAL CARE ROUTINES

For most people, personal care is embedded in their daily life, with their routines taking up a meaningful amount of time each day. Consumers spend an average of 13 minutes a day on their beauty and personal care routine.²¹ As such, this average is not being driven by just a small group of highly engaged consumers. It reflects a daily commitment across most of the population.

2.1.4 BEAUTY AND PERSONAL CARE SPEND

Spending patterns reinforce this picture of routine use. Survey respondents spend an average of £27 a month on beauty and personal care products and services. More than half (53%) spend more than £10 a month, and around one in four (27%) spend £25 or more.²² Among those categorised as ‘frequent users’ the monthly average spend on beauty and personal care products and services increases to £35 a month, reflecting the greater role that beauty and personal care plays in the routines of those who engage with the sector most regularly.²³

These findings suggest that spending on beauty and personal care is not concentrated among a small group of high spenders or limited to occasional purchases. Instead, it is a regular part of everyday household consumption. The cumulative value of these recurring purchases helps explain the sector’s place within household budgets: its economic significance comes not only from how much individuals spend at any one time, but from the frequency and breadth with which these expenditures are made.

This picture is broadly consistent with household spending data from the Office of National Statistics which underpins the analysis of previous Oxford Economics Value of Beauty research.²⁴ This source puts average monthly spending on beauty at £27.4 per person.²⁵

FIGURE 2: TIME SPENT ON PERSONAL CARE AND GROOMING ON A TYPICAL DAY BY ALL SURVEY RESPONDENTS

Source: Oxford Economics, YouGov
Figures do not sum to 100% as “Prefer not to say” and “Don’t know” responses are excluded.

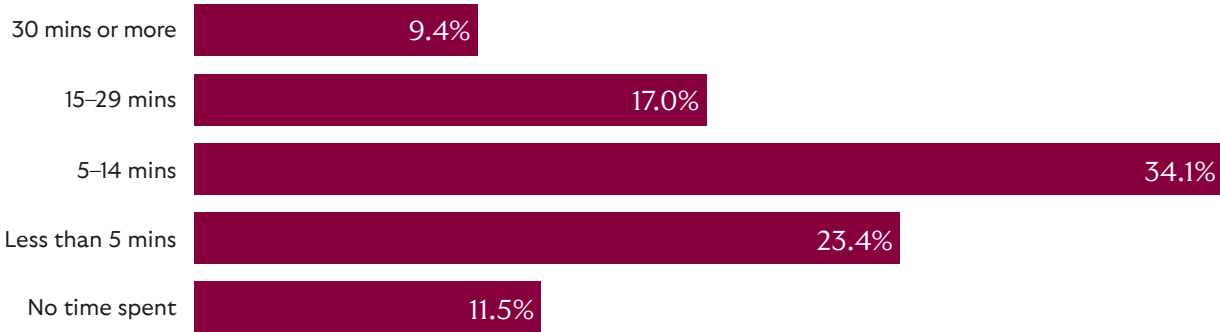
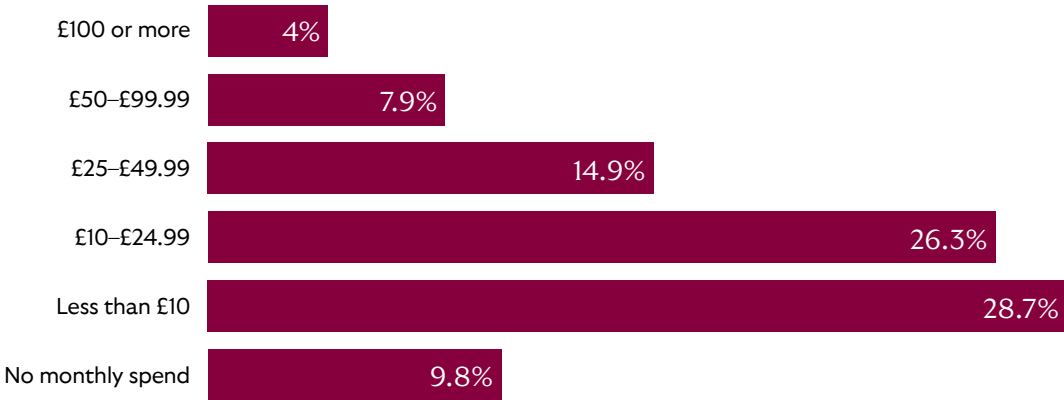


FIGURE 3: AMOUNT SPENT ON PERSONAL CARE PRODUCTS AND SERVICES IN A TYPICAL MONTH BY ALL SURVEY RESPONDENTS

Source: Oxford Economics, YouGov
Figures do not sum to 100% as “Prefer not to say” and “Don’t know” responses are excluded.



17 Survey respondents were asked to report their service usage and frequency for the following service categories: hair and barbering, nail services, body treatments, face treatments, holistic treatments and other treatments.

18 Average frequency for each service category was estimated by assigning a midpoint value to each frequency band and then calculating a weighted average based on the proportion of respondents selecting each band.

19 The frequency ‘at every three months’ was obtained by aggregating the following options from the survey: ‘at least once a week’, ‘at least once a month’, ‘every 2–3 months’.

20 The frequency ‘at least monthly’ was obtained by aggregating the following options from the survey: ‘at least once a week’ and ‘at least once a month’.

21 The average time spent on beauty routines was calculated by assigning the midpoint of each time bracket in the survey and calculating a weighted mean based on the proportion of respondents falling within each bracket. ‘Don’t know’ and ‘Prefer not to say’ responses were excluded from the calculation.

22 10% of respondents report no spend in a typical month. This may be the case, despite regular consumption, given the framing of the question around personal expenditure rather than that of the household.

23 Further details on the subgroup of ‘frequent users’ can be found in Appendix 1. Consumer profiles: Methodological note

24 British Beauty Council & Oxford Economics, “The Value of Beauty 2026”, last accessed August 2026

25 This figure is calculated using household spending data and therefore captures the average monthly spending of all adults in the UK.

2.2 NECESSITY, NOT LUXURY

For most consumers, spending on personal care is a necessity, rather than a discretionary indulgence. Just around one in five described it as more of a treat than a necessity, and only 7% described it as entirely a treat.²⁶



Only 7% describe beauty as entirely a treat.

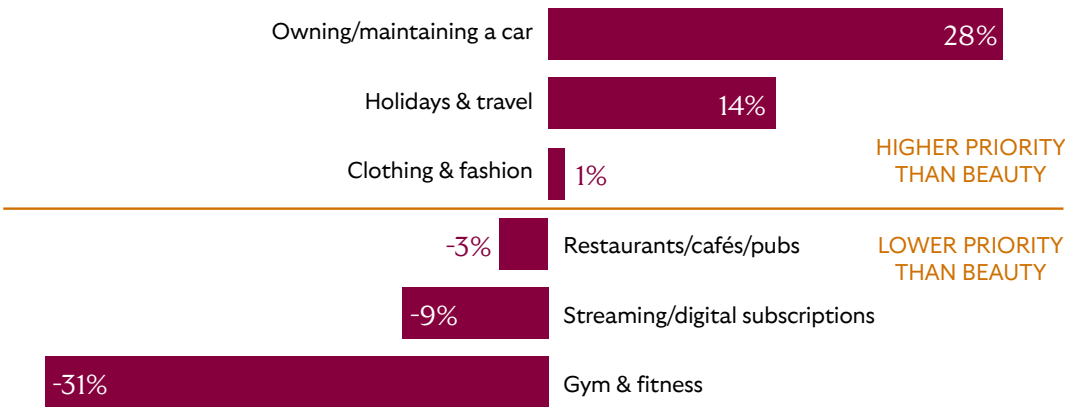
This classification of personal care as a necessity is not confined to any one part of the population. It is consistent across different groups such as gender, age, and socioeconomic grade.²⁷

Consumers’ relative spending priorities further emphasise the importance of beauty and personal care in consumers’ discretionary spending. We asked respondents to assess whether spending in six common categories was a higher or lower priority than beauty and personal care, or about the same. By comparing the percentage of people who said a particular product or service was a higher priority than beauty and personal care to those who said the same product or service was a lower priority, we could calculate a “net higher priority score”.²⁸

Spending on beauty and personal care is prioritised above gym and fitness memberships, streaming and other digital subscriptions, and eating out at restaurants, cafés, and pubs. It ranks roughly the same as clothing and fashion. Thus, among the recurring discretionary categories of spend that respondents were asked about, personal care typically ranked ahead.

FIGURE 4: NET SHARE OF ALL SURVEY RESPONDENTS REPORTING VARIOUS GOODS AND SERVICES AS A HIGHER PRIORITY THAN BEAUTY GOODS AND SERVICES

Source: Oxford Economics



26 Consumers were asked “Which of the following best describes how you think about your spending on personal care products and services?” 64% of adults described it as entirely a necessity, more of a necessity than a treat, or equally a necessity and a treat. 21% describe it as more of a treat than a necessity, and just 7% as entirely a treat.

27 For example, respondents in the C2DE socioeconomic grade (which includes manual workers, state pensioner, casual workers and unemployed with state benefits) are no more likely than those in ABC1 (which includes managerial roles, administrative and professional roles and supervisory and clerical roles) to describe personal care as a treat.

28 For example, 28% of respondents said that streaming services and other digital subscriptions are a much higher or somewhat higher priority than personal care. This compared to 37% who said that streaming services were either a somewhat lower or much lower priority. This yields a net priority score of -9 percentage points.

SECTION 3
CONNECTION,
COMMUNITY, AND
THE HIGH STREET

This section provides evidence for understanding beauty and personal care as a nationwide industry with a local footprint. Across the UK, salons, barbershops, nail bars, retail outlets, and other personal care businesses are embedded in high streets, town centres, and neighbourhoods, where they support both social interaction and local economic activity. For many consumers, these settings are not only places to access services, but also familiar spaces for conversation, connection, and regular face-to-face contact.

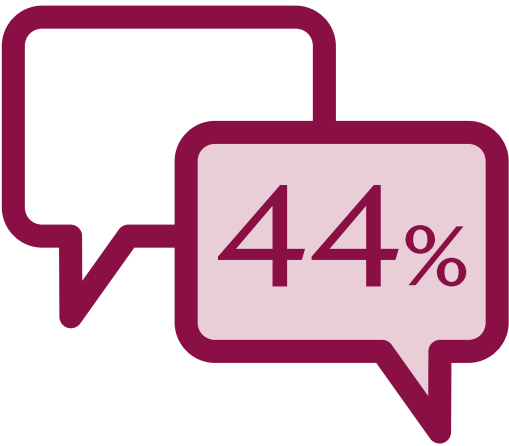
The chapter brings together two sources of evidence to examine that role. It first draws on survey findings to show how personal care appointments can provide trusted settings for meaningful conversation, routine contact, and social connection. It then uses geospatial analysis to show how widely these businesses are distributed across the UK and how important they are to the amenity mix, footfall, and vitality of high streets and local centres.

The evidence shows that the sector’s contribution lies not only in the services provided within these spaces, but also in the role those spaces play in supporting community connection and the resilience of town centres.

3.1 TRUSTED SPACES FOR CONVERSATION, CONNECTION, AND CARE

Beauty and personal care appointments can act as a platform to socialise, connect with others, have meaningful conversations, and receive emotional support. For some people, visits to salons, barbers, and other personal care service providers are part of their social routine, offering regular human contact and a trusted environment in which to talk and connect.

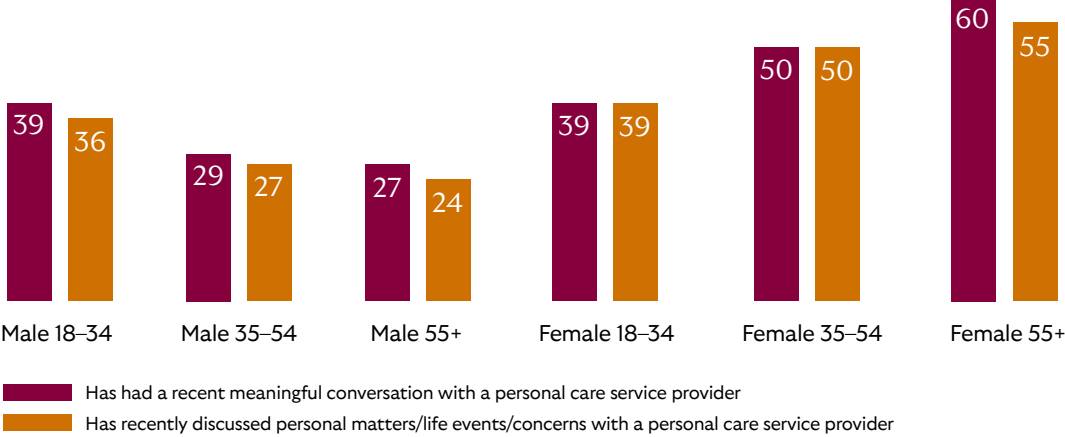
Beauty and personal care appointments are opportunities for meaningful conversation and a platform to discuss important personal matters. 44% of frequent users said that in the last six months they had had a meaningful conversation with a personal care service provider. While this is more common for women than for men (52% vs 32%), the gender gap narrows among younger people aged 18–24, where men and women report more similar results (33% vs 38% respectively). Moreover, across all age and gender groups, at least a quarter of frequent users reported having a meaningful conversation with a personal care service provider on at least one occasion in the last six months.



44% of frequent users report having had a meaningful conversation with a personal care provider in the last 6 months.

FIGURE 5: SHARE OF FREQUENT USERS REPORTING MEANINGFUL CONVERSATIONS/DISCUSSIONS WITH PERSONAL CARE SERVICE PROVIDERS

Source: Oxford Economics, YouGov



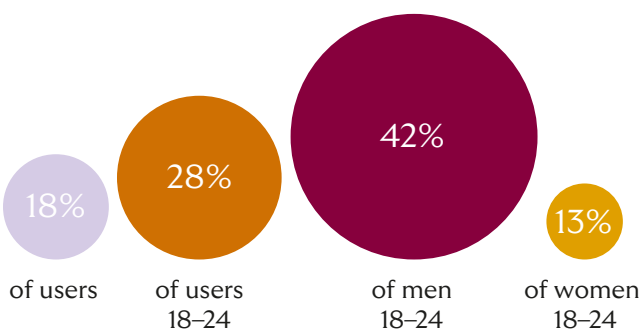
Being able to discuss personal matters and life events is also important: 42% of frequent users said they had spoken with a personal care provider about personal issues. Again, women were more likely to report this than men (49% versus 29%) but the pattern was more consistent between young men and young women.

The need for spaces that facilitate social connection is particularly salient against the backdrop of persistent loneliness in England. The latest Community Life Survey finds that 7% of adults report feeling lonely often or always, with levels remaining above those recorded in the earlier years of the survey.²⁹ Importantly, loneliness is not concentrated among older people: 9% of 16–24-year-olds report feeling lonely often or always, compared to 5% among those aged 50–64 and 5% among those aged 75 and over. Young adults were also the most likely to report high levels of indirect loneliness.



42% of frequent users said they had spoken with a personal care provider about personal issues.

FIGURE 6: SHARE OF FREQUENT USERS REPORTING THAT IN SOME WEEKS VISITING A PERSONAL CARE PROVIDER IS ONE OF THE FEW TIMES THEY INTERACT WITH OTHER PEOPLE



29 Department for Digital, Culture, Media and Sport, “Community Life Survey 2024/25: Loneliness and support networks (Figure 1.1)”

This pattern is also reflected in the survey results. Among frequent users, 18% say that, in some weeks, visiting a personal care provider is one of the few times they interact with other people. This rises among younger people to almost three in 10 of those aged 18–24. It is particularly pronounced among young men aged 18–24 where 42% agree, compared with 13% of women in the same age group.

This shows how everyday spaces that provide opportunities for informal social interaction can take on greater importance. Personal care services such as hairdressers, barbers, and nail salons are not just places where customers simply receive a service, but they also provide regular, familiar points of contact and opportunities to interact with others, reducing isolation and maintaining a sense of connection.

This pattern is also reflected in the survey results. Among frequent users, 18% say that, in some weeks, visiting a personal care provider is one of the few times they interact with other people. This rises among younger people to almost three in 10 of those aged 18–24. It is particularly pronounced among young men aged 18–24 where 42% agree, compared with 13% of women in the same age group.

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3.2 CREATING VIBRANCY AND INCENTIVISING SPEND

Beauty and personal care service providers and retailers on high streets and in town centres play an important role in supporting the vitality of these locations. They generate regular footfall and help sustain demand for surrounding businesses, as many consumers combine a personal care appointment with other local purchases. This matters for high streets because while these services attract visitors into town centres for a specific purpose, they create opportunities for wider economic activity.

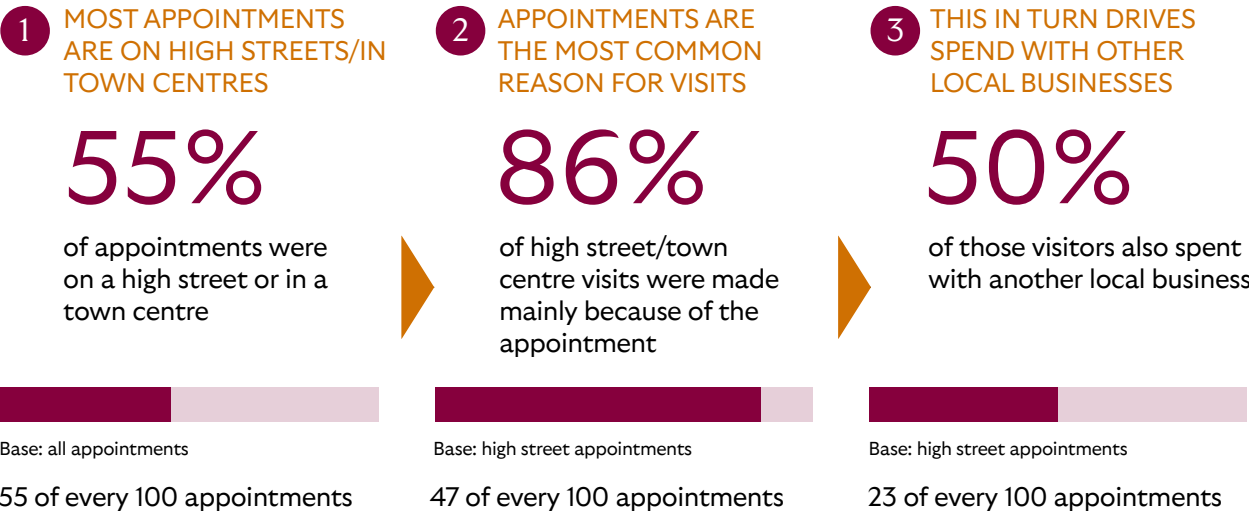
Consumers choose high streets and town centres as their preferred locations for personal care appointments. More than half (55%) of respondents’ most recent appointments with a personal care provider took place on a high street or in a town centre, and in 86% of these cases the appointment was the main reason for the visit.³⁰ This suggests that personal care businesses are not simply benefitting from existing footfall; they are actively creating it. The survey shows that 1 in 2 high-street appointments also led to spending at other high street or town centre businesses. This means that 23% of all appointments generated additional spending elsewhere, creating economic activity that may not otherwise have occurred.

The footfall generated by these appointments brings high streets to life and supports wider local growth. Higher footfall and linked spending strengthen neighbouring retail, hospitality, and service businesses, helping to sustain jobs and business turnover in town centres and high streets. In turn, a stronger local business environment can support skills development and employment opportunities, both within the beauty and personal care sector and across the wider high street economy. This is closely aligned with UK high street policy priorities, which increasingly focus on creating vibrant, multifunctional town centres, supporting local enterprise, and encouraging place-based growth.



42% of 18–24-year-old men who are frequent users say that in some weeks, visiting a personal care provider is one of the few times they interact with other people.

30 Respondents were asked: “Thinking about the last time you visited a personal care service provider (e.g. a hairdresser, barber, beauty therapist or nail technician), where did that appointment take place? (Please select the option that best applies)”



3.3 A NATIONAL HIGH STREET PRESENCE

Previous sections established the importance of beauty and personal care establishments for building human connection through personal care, conversation, and providing community space while also supporting local retail in the process, driving foot traffic to nearby shops, partnering with local brands, and keeping neighbourhood high streets active and busy. Personal care services are also one of the few parts of the high street economy that cannot migrate online. Every appointment is a visit in person, and usually a repeat one, making these businesses a dependable source of footfall for the shops, cafés, and other services around them. For nearly nine in 10 respondents (86%) these appointments were the main reason for visiting their high streets or town centres.

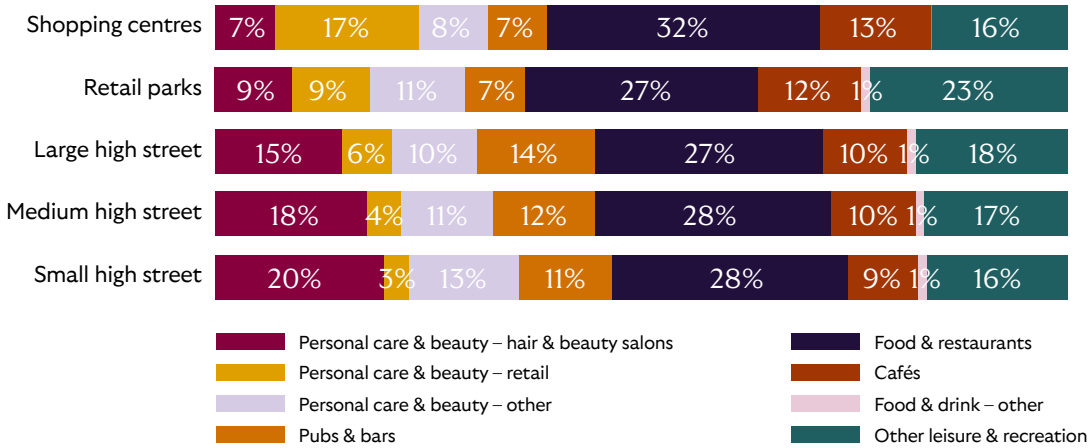
Personal care establishments are a prominent feature of town centres and high streets across the country. There are more than 190,000 (191,200) beauty and personal care businesses in the UK,³¹ accounting for almost one-third of leisure and recreation amenities across UK retail zones.³² In large and medium-sized high streets in particular, the sector accounts for more than three out of 10 leisure and recreation amenities.



In 86% of high street personal care appointments, the appointment is the main reason for visiting the high street.

FIGURE 7: THE LEISURE AND RECREATION SPLIT OF UK HIGH STREETS³⁴

Source: Oxford Economics, Overture Maps, Ordnance Survey



Personal care establishments in small high streets are even more important, accounting for more than 36% of leisure and recreation amenities.³³ Looking at hair and beauty salons alone, they represent about two out of 10 leisure amenities. This is equivalent to the share of pubs, bars, and cafés combined. The only type of amenity that surpasses personal care and beauty as a share of leisure and recreation is the food and restaurant sector, which accounts for more than one-quarter of all leisure and recreation across all types of retail areas.

The smaller the high street, the more its vitality rests on personal care. The sector is more prominent in smaller high streets with beauty and personal care establishments accounting for at least one-quarter of all leisure and recreation in all small high streets and for more than 35% in almost eight out of 10 small high streets. That is roughly twice the share in medium-sized high streets and 2.4 times the share in larger ones.



Beauty businesses account for 36% of leisure and recreation amenities on small high streets. This is more than triple pubs' presence.

31 For a definition of “beauty and personal care” businesses, please refer to Appendix 2.
32 A total of 6,400 retail zones were identified across the UK. Their precise location and area are made available by the Geographic Data Service. For more information, please refer to Appendix 2.

33 For a definition of “leisure and recreation” amenities, please refer to Appendix 2.
34 For a definition of “hair & beauty salons”, “retail”, and “other” in the “personal care & beauty” category, please refer to Appendix 2.

3.4 THE SECTOR’S EXTENSIVE REACH

The sector’s footprint, while predominantly urban, is deeply entrenched in small and medium-sized communities across the whole of the country and extends even to some of its most remote and sparsely populated areas. Nearly four in 10 (39%) personal care and beauty amenities are located outside large cities, in smaller communities as Figure 8 shows. Around three in 10 (29%) sit in small and medium-sized towns or in suburban areas. These include places such as Clacton-on-Sea and Durham in England, Caerphilly and Port Talbot in Wales, Stirling and St Andrews in Scotland, and Armagh and Newry in Northern Ireland, towns that are home to considerably smaller populations and that rely heavily on their high streets and on the amenities those high streets carry. A further one in 10 are in villages and rural communities, which typically look to a nearby town for whatever their own settlement cannot support.

Beauty and personal care amenities are often found in areas with low population density across the country.

As Figure 11 shows, around 16% of all beauty amenities are in statistical areas with a population density below 500 residents per square kilometre. These are predominantly rural and sparsely populated areas, with densities far below the UK median of 2,500 residents per square kilometre, and they tend to cover a great deal of ground, such as the Lake District and the Yorkshire Moors in the north of England, most of rural Wales, and the Highlands and Western Isles of Scotland. In many of those parts of the country, the leisure and recreation offer is much more limited, making beauty and personal care amenities an integral part of communities and local economies.

This share grows considerably for areas with a population density below 1,000 residents per square kilometre. About one in four (23%) beauty and personal care amenities is in areas with a population density below 1,000 residents per square kilometre, typically medium-sized towns, or the suburban fringes attached to larger cities. Some of those include the outskirts of large cities such as Bolton, Cardiff, Swansea, Colchester, or Sheffield, or smaller and medium-sized towns including Coleford, Windsor, Beaconsfield, and Oxted. Importantly, these low-density areas cover almost a quarter (24%) of all statistical areas and are spread equally around the country.

FIGURE 8: SHARE OF PERSONAL CARE AND BEAUTY AMENITIES BY COMMUNITY TYPE³⁵

Source: Oxford Economics, Overture Maps, Ordnance Survey
Note: percentages may not add up to 100% due to rounding

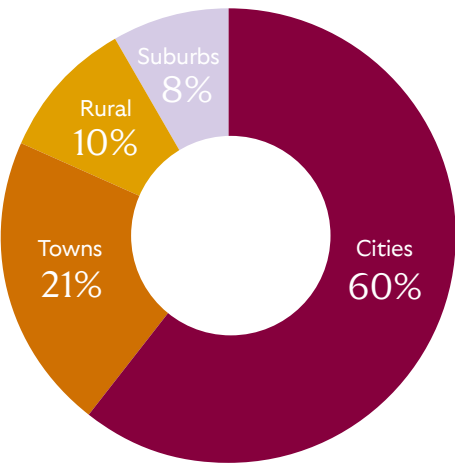
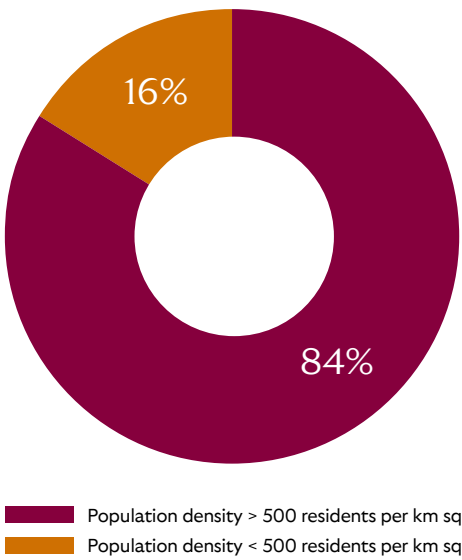


FIGURE 9: DISTRIBUTION OF PERSONAL CARE AND BEAUTY AMENITIES ACROSS COMMUNITIES, BY POPULATION DENSITY

Source: Oxford Economics, Overture Maps



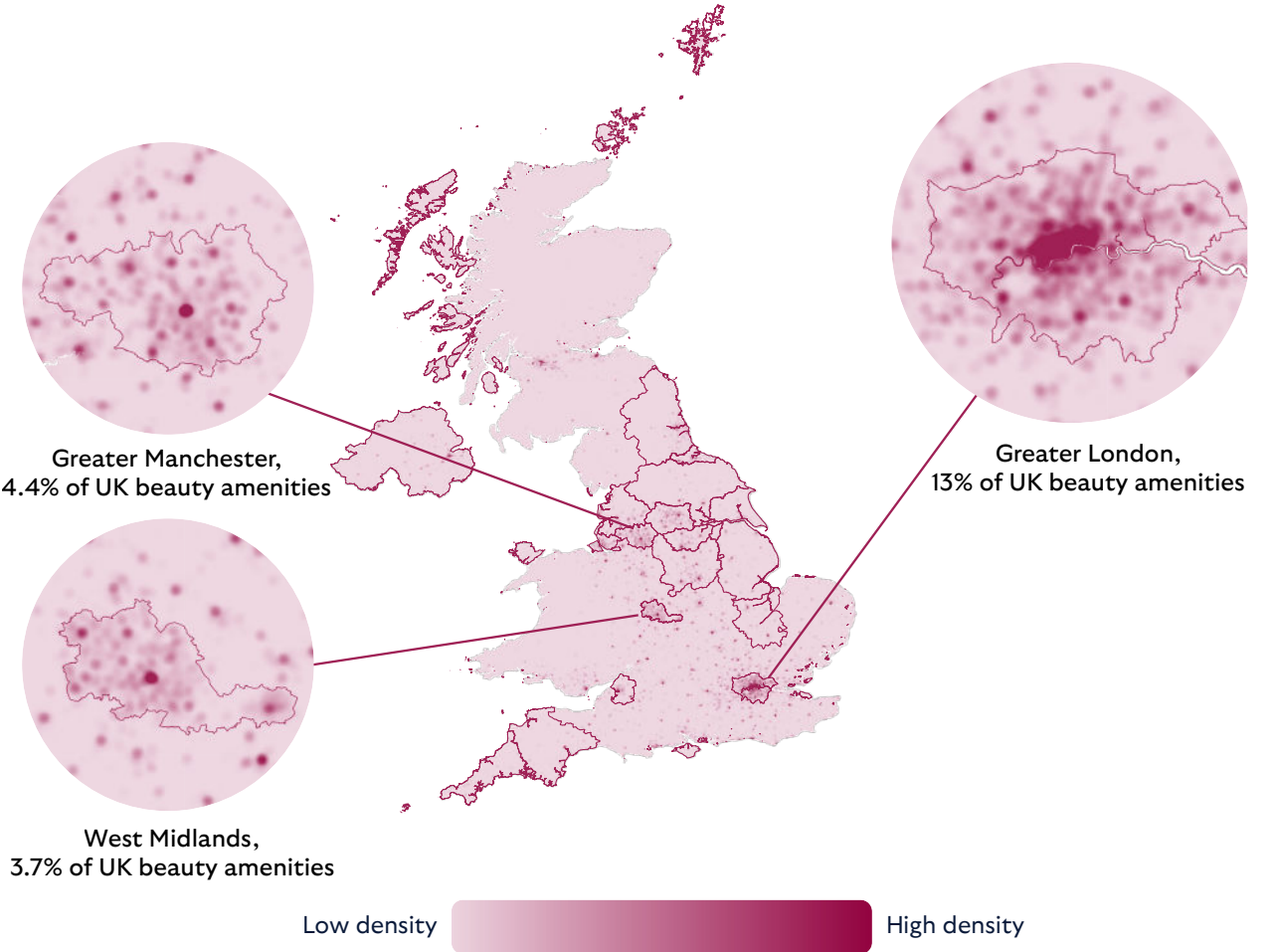
35 The community type is defined by the degree of urbanisation made available by the Joint Research Centre’s (JRC) Global Human Settlement Layer (GHSL).

3.5 A STORY BEYOND LONDON

The highest concentration of beauty and personal care establishments is found in London, which is unsurprising given the size of its resident population and the daily influx of commuters and visitors. Looking beyond the absolute numbers, however, the sector is highly concentrated in several other parts of the country.

Greater London is home to just under 25,000 personal care and beauty amenities, the largest concentration anywhere in the UK and around 13% of the national total. It is also home to some 9.8 million people, or roughly 14% of the UK population. In absolute terms, Greater London leads the way, followed by Greater Manchester and the West Midlands, the two largest combined authorities after London by both population and number of amenities, who host approximately 8,450 and 7,100 personal care and beauty amenities respectively, or about 4.4% and 3.7% of the national total.

FIGURE 10: DENSITY OF PERSONAL CARE AND BEAUTY AMENITIES IN THE UK, GREATER LONDON, GREATER MANCHESTER, AND WEST MIDLANDS

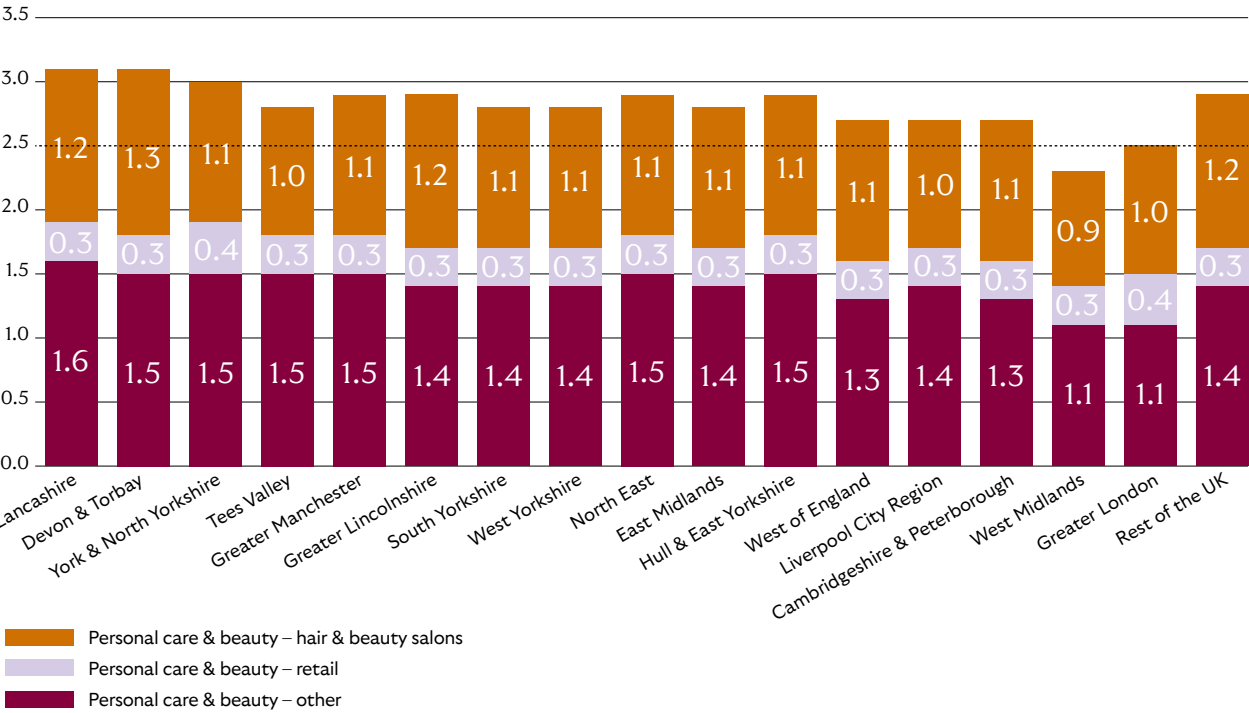


Measured against population, many parts of the country match or outpace the capital. Greater London has approximately 2.5 personal care and beauty amenities per 1,000 residents, while less-populous combined authorities such as Devon and Torbay, Lancashire, and York and North Yorkshire each have more than three. Several northern authorities also sit above the London figure, ranging from 2.9 amenities per 1,000 residents in Greater Manchester to 2.7 in Liverpool City Region, with Tees Valley and West Yorkshire in between at 2.8.³⁶



FIGURE 11: PERSONAL CARE AND BEAUTY AMENITIES PER 1,000 RESIDENTS BY UK COMBINED AUTHORITIES³⁶

Source: Oxford Economics, Overture Maps



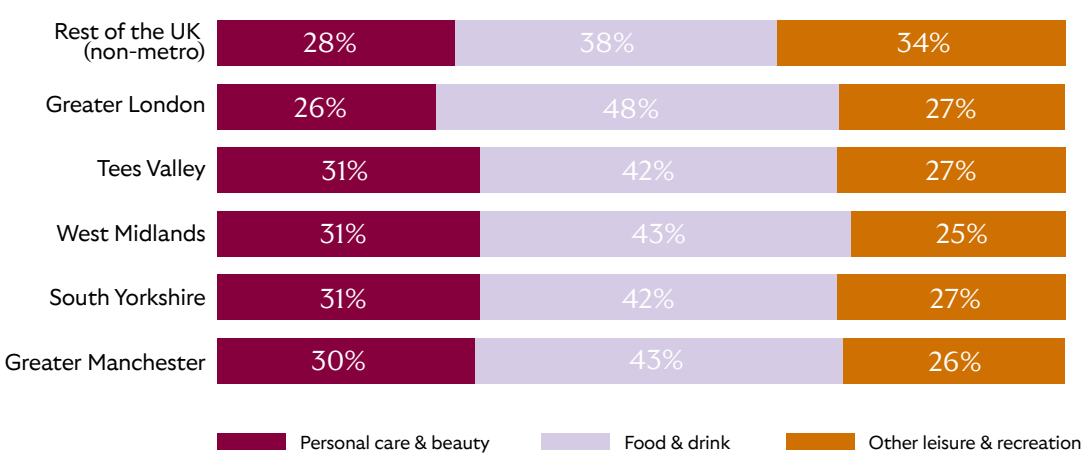
³⁶ For definitions of “hair & beauty salons”, “retail”, and “other” under the “personal care & beauty” category, please refer to Appendix 2.

In most combined authorities outside Greater London, where the broader leisure and recreation offering is thinner, personal care and beauty establishments represent a more important share of all leisure and recreation amenities. In Greater Manchester, South Yorkshire, the West Midlands, and Tees Valley it accounts for at least 30%, four percentage points above the London figure. Only two combined authorities fall below Greater London, York and North Yorkshire at 23% and Devon and Torbay at 24%.

The importance of beauty and personal care establishments outside London is most pronounced in sparsely populated areas. These are areas built around smaller towns, where the overall density of amenities is lower. In these communities the mix of leisure and recreation options is considerably more limited, which makes personal care and beauty one of the few available amenities. At the parliamentary constituency level, there are 52 constituencies where the sector accounts for more than 35% of all leisure and recreation. All but one of those, Croydon East, lie outside London, and the vast majority are in lower-density areas.³⁸

FIGURE 12: LEISURE AND RECREATION IN COMBINED AUTHORITIES IN ENGLAND³⁷

Source: Oxford Economics, Overture Maps



³⁷ The figure compares the four combined authorities with the highest share of personal care and beauty relative to all leisure and recreation amenities. Tees Valley, West Midlands, South Yorkshire, and Greater Manchester are the only combined authorities where the sector accounts for more than 30% of leisure and recreation.

³⁸ Appendix 3 presents a table ranking parliamentary constituencies by the share of beauty and personal care establishments of all leisure and recreation, broken down by population density.

SECTION 4

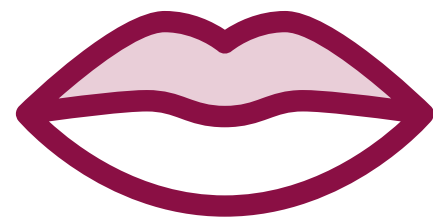
THE IMPACT OF BEAUTY IN CONSUMERS' EVERYDAY LIVES

4.1 THE IMPACT OF BEAUTY ON WELLBEING

In this section, we use survey evidence to unpack the personal wellbeing impacts of beauty products and services.

While the beauty and personal care industry is often measured by what it sells, for example, the products purchased, the services provided, and the expenditure generated, to understand the real scale of the impact of the beauty and personal care industry we need to account for what it enables and the impact it has on these measures of wellbeing. From supporting confidence and self-esteem to creating opportunities for social connection and self-expression, the industry can shape how people feel about themselves, how they present themselves to others and how they engage with the world around them.

Therefore, beauty and personal care can influence experiences and outcomes that extend well beyond the immediate purchase of a product or service. Understanding the whole contribution of the industry, therefore, requires looking beyond consumption itself to the wellbeing and social value that beauty and personal care enable.



75%

75% of frequent users say that using personal care products and services has a positive impact on how they feel about themselves.

4.2 A CLEAR POSITIVE EFFECT

Beauty and personal care products and services have a clear positive effect on how people feel about themselves. Three-quarters of frequent users say that using these products and services has a positive effect on how they feel about themselves. Across the population as a whole, including those who use little beyond basic hygiene products, the share reporting a positive effect is still more than six in 10 (61%).

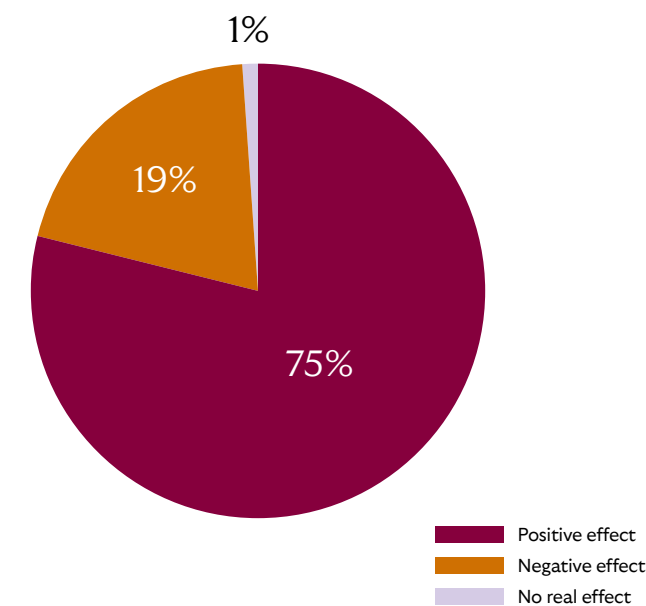
The effect is strongest among women but is not confined to them. Around eight in 10 female frequent users report a positive impact, compared to two-thirds of men.

By age, the effect peaks among 25–34-year-olds (82%) and is lowest among 45–54-year-olds (68%), though it remains clearly positive in every band.

The effect does not depend on socioeconomic status. Frequent users in the ABC1 and C2DE social grades, broadly corresponding to manual workers and professional or administrative roles respectively, report almost identical results (77% and 73%). Whatever benefit people derive from personal care is distributed evenly across the population rather than concentrated among those able to spend most on it. The sections that follow examine where that benefit comes from: confidence and resilience, readiness for the moments that matter, mood, and identity and self-expression.

FIGURE 13: REPORTED EFFECT OF PERSONAL CARE PRODUCTS AND SERVICES ON HOW FREQUENT USERS FEEL ABOUT THEMSELVES

Source: Oxford Economics
Figures do not sum to 100% as "Prefer not to say" and "Don't know" responses are excluded.



What personal care means for men

Men engage with beauty and personal care less than women do, but the benefits they report are still significant. Two-thirds of men who are frequent users of personal care (66%) report that personal care products and services have a positive effect on how they feel about themselves. Across men in the population as a whole, including those who use few products or services outside of basic hygiene products, that figure is close to half (48%).

The effect carries into working life. Among men who are frequent users of personal care and in work, 45% say personal care products and services support them to feel more confident in a professional setting, and 53% say they help them feel like they are making a positive first impression. On whether personal care helps them feel taken seriously at work, men and women report almost identical rates (41% and 42%).

The same pattern of lower frequency but comparable significance appears in what men report about appointments themselves. Around a third of men who are frequent users of personal care (32%) have had a meaningful conversation with a personal care service provider in the past six months, and 29% have discussed personal matters, life events, or concerns with one. Both figures sit below the equivalent for women (52% and 49%), but the gender gap disappears elsewhere. Frequent users are also about as likely to say that there are weeks when visiting a personal care provider is one of the few times they interact with another person (20% and 17%). They are also about as likely to say that visiting a provider helps them feel part of their local community (27% and 28%).

4.3 CONFIDENCE AND RESILIENCE

Confidence is one important way in which beauty and personal care appears to matter to people. It is where a private routine can begin to touch on public life, reflecting how comfortable someone feels entering a room, or how they approach a demanding day. The survey looked at this from two angles: confidence in appearance, and a broader sense of being able to cope with everyday life.

Nearly half of frequent users said they would not feel as confident about their appearance without using personal care products and services, against 31% who said they would feel equally confident either way. This effect is more pronounced for women (52% disagreed) and is highest among 25–34-year-olds (50% disagreed).

How people feel about their skin, and their use of skincare products is one dimension of the confidence effect. Two-thirds of frequent users said the condition of their skin affects how confident they feel about their appearance, rising to 76% of 25–34-year-olds. Products appear to help in this regard, with 59% of frequent users having agreed that skincare products help them feel more confident about their skin or scalp, rising to 68% among women and 68% among 18–24-year-olds.

Another everyday benefit experienced by many is the sense of resilience that personal care products and services can help to instil. Almost half of frequent users (48%) agreed that personal care products and services helped them feel more resilient in facing day-to-day challenges, against 14% who disagreed. Though this resilience effect is reported more frequently by women, a meaningful minority of men agreed as well (55% versus 37%).

Confidence is also shaped by the ability to express and present oneself in ways that feel authentic and personal, with beauty and personal care providing one avenue for people to explore their identity, creativity and personal style. All of these themes emerged as relevant to survey respondents and are further explored in Section 4.6.

Taken together, these findings suggest that beauty and personal care can support confidence in ways that extend beyond looks. By helping people feel better about specific aspects of their appearance, they increase the confidence and resilience they bring to everyday challenges.

4.4 SHOWING UP FOR THE MOMENTS THAT MATTER

Confidence in appearance affects both the extent to which people take part in social and professional lives, as well as how they feel once they are there. We asked individuals both about their willingness to participate in these settings and their experience of participating.

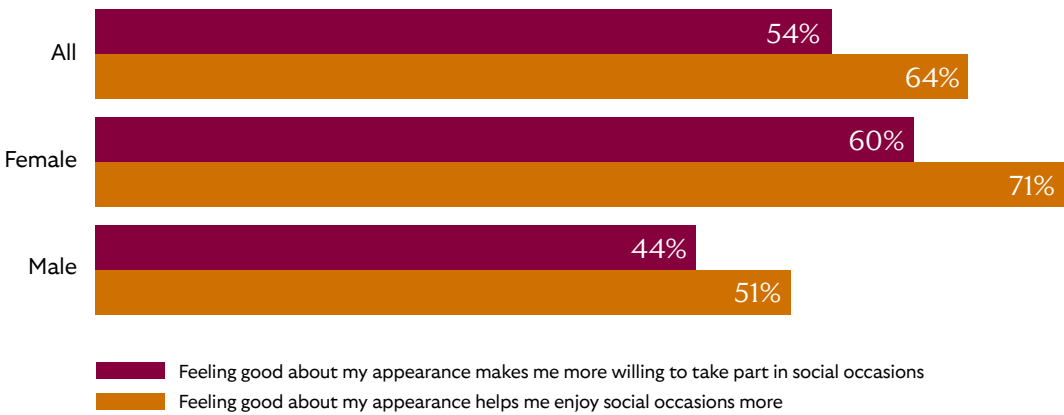
In their social lives, feeling good about their appearance changes what frequent users are willing to do. More than half (54%) agreed that it has made them more willing to take part in social occasions. And it impacts how they feel once they are at social occasions, with nearly two-thirds (64%) having agreed that it has helped them to enjoy social occasions more.

This effect is tied in part to using personal care products and services, which influences how people feel about their appearance. 51% of frequent users said that using a personal care product or service has helped them feel more confident at a social occasion. This experience is particularly strong for women compared to men (59% vs. 38%).



Half of frequent users said that using a personal care product or service boosted their confidence at social occasions.

FIGURE 14: SHARE OF FREQUENT USERS AGREEING WITH STATEMENTS ON THE IMPACT OF FEELING GOOD ABOUT THEIR APPEARANCE



In professional settings the same pattern holds, but the difference between men and women is narrower. 56% of frequent users agreed that taking care of their appearance had helped them make a positive first impression at work, and a similar share (51%) said that using a personal care product or service had helped them feel more confident in a professional setting. On the impact on first impressions, men and women reported similar rates, at 53% and 57% respectively.

How people feel about themselves shapes how they get on at work. Traits like self-esteem influence how long people stay in education and what they go on to earn.³⁹ Some of this starts early. Teenagers with low self-esteem go on to spend fewer years in education after school, are less likely to be in work, and earn less as adults.⁴⁰

The picture for people’s social lives looks similar, and the two reinforce each other. For many people, the ability to express themselves and to feel comfortable when presenting themselves to others is an important part of feeling confident and at ease. Beauty and personal care can provide an avenue for this form of expression which can support confidence, making it easier to engage with others, build relationships and participate in social situations. For example, people who feel better about themselves go on to have stronger relationships, and stronger relationships in turn lift how they feel about themselves.⁴¹

39 James Heckman, Jora, Stixrud, and Sergio Urzua, “The Effects of Cognitive and Noncognitive Abilities on Labor Market Outcomes and Social Behavior”, *Journal of Labor Economics*, 24(3), 2006
40 Glen Waddell, “Labor-Market Consequences of Poor Attitude and Low Self-Esteem in Youth”, *Economic Inquiry*, 44(1), 2006
41 Michelle Harris and Ulrich Orth, “The Link Between Self-Esteem and Social Relationships: A Meta-Analysis of Longitudinal Studies”, *Journal of Personality and Social Psychology*, 119(6), 2020

FIGURE 15: SHARE OF FREQUENT USERS AGREEING WITH STATEMENTS ON THE IMPACT OF CONFIDENCE AND APPEARANCE IN PROFESSIONAL SETTINGS



4.5 BOOSTING MOODS

Beauty and personal care routines also appear to play a role in supporting and improving people’s moods. Just over half of frequent users (52%) agreed their personal care routine helps improve their mood.

The mood-enhancing effect is strongest among younger people. More than six in 10 under-35s agree, falling to just 45% of the over-55s. Women are also more likely to report the effect than men (57% against 44%). Skin health again emerges as an important factor in determining emotional wellbeing linked to consumers’ mood. 52% of frequent users agreed that concerns about their skin can negatively affect their mood. This finding also has a clear age gradient with the highest share of users agreeing being those aged 18–24, and the lowest being those aged 55 or over.



52% of frequent users report improved mood thanks to their personal care routine.

4.6 FOSTERING IDENTITY AND SELF-EXPRESSION

Beauty and personal care can also play an important role in strengthening people’s sense of self and providing them with a creative outlet. 42% of frequent users agreed that their personal care and grooming routines help to reinforce their sense of self, and 28% said that their personal care and grooming routine gave them an opportunity to be creative.

These connections are especially strong among young adults. Among 18–24-year-olds, 55% say their routines help to reinforce their sense of self and 53% describe them as an outlet for creativity and experimentation.

Thus, for many younger people, beauty and personal care is not only about presentation but also about formation of an identity and self-expression. The identity function declines gradually with age, whereas the creative function declines more quickly. As such, personal care appears to remain part of how a lot of people understand themselves throughout life, while its role as a medium for experiment is concentrated in early adulthood.

FIGURE 16: SHARE OF FREQUENT USERS AGREEING THAT THEIR PERSONAL CARE ROUTINE HELPS IMPROVE THEIR MOOD

Source: Oxford Economics, YouGov

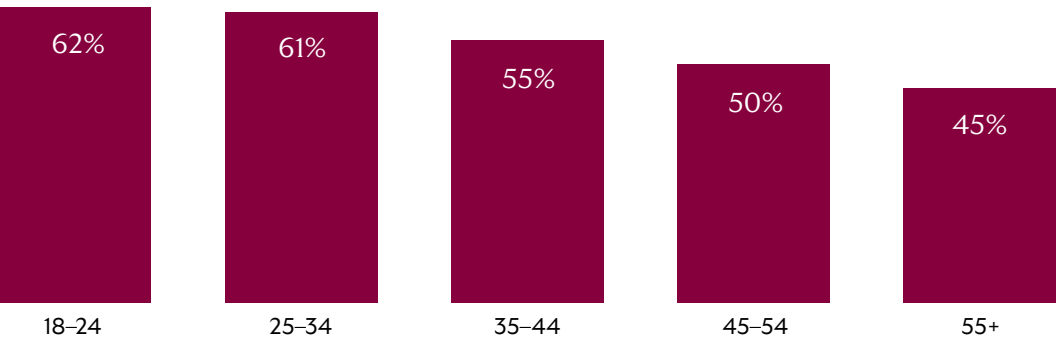
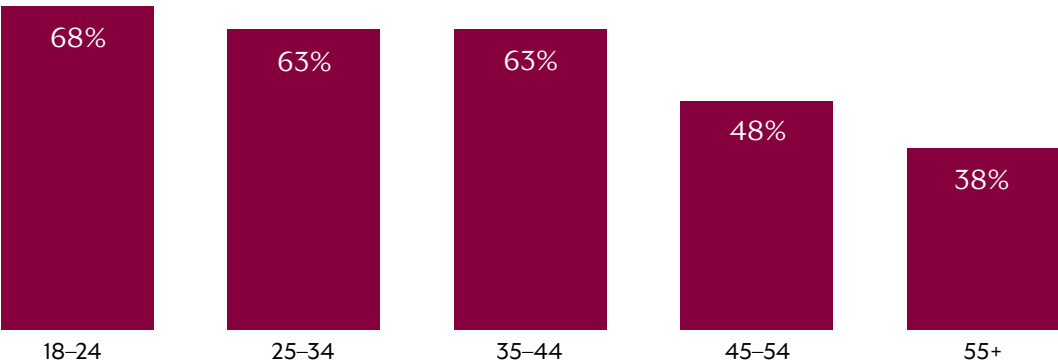
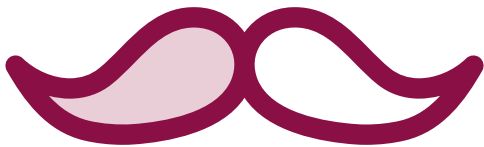


FIGURE 17: SHARE OF FREQUENT USERS AGREEING THAT CONCERNS ABOUT THEIR SKIN CAN NEGATIVELY AFFECT THEIR MOOD

Source: Oxford Economics, YouGov



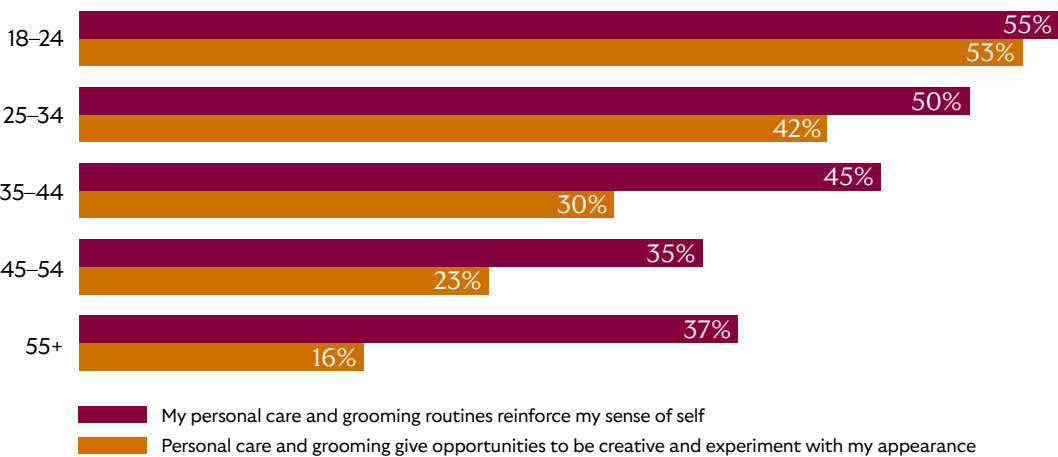
55% of 18–24-year-old frequent users find that their personal care and grooming routines reinforce their sense of self.



Half of young people see their personal care and grooming routine as a form of creativity and self-expression.

FIGURE 18: SHARE OF FREQUENT USERS AGREEING THAT PERSONAL CARE ROUTINES REINFORCE THE SENSE OF SELF AND PROVIDE OPPORTUNITIES TO BE CREATIVE

Source: Oxford Economics, YouGov



How young adults interact with personal care

Across several measures, personal care occupies a larger place in younger adults’ lives than in older adults’. When asked to define what wellbeing means to them, almost half of young adults who frequently use personal products and services include taking care of their appearance in their definition, against 36% of those aged 55 and over.

Young adults are more likely to report concerns about their appearance. Around seven in 10 under-35s who are frequent users agree the condition of their skin affects how confident they feel about their appearance (72% of 18–24s and 76% of 25–34s, against 58% of over-55s). Roughly two-thirds say -skin concerns can negatively affect their mood (68% and 63%, against 38%). These concerns can lead some to withdraw: 42% of 18–24s and 37% of 25–34s have avoided or delayed attending a social occasion in the past six months because they did not feel able to present themselves as they would have liked. Among over-55s, that figure is 8%.

They are also the most likely to use personal care to address these issues. Half of under-35s who are frequent users (51% of 18–24s and 47% of 25–34s) have used a personal care service at least once in the past six months specifically to prepare for a social occasion. A similar share (55% and 53%) have used a product or service to prepare for a work or professional occasion. Both rates are more than double those reported by over-55s. Around six in 10 agree that feeling good about their appearance has made them more willing to take part in social occasions (62% and 65%, against 47%).

SECTION 5
CONCLUDING
REMARKS

Beauty and personal care has a broader impact on UK society than standard economic measures capture. As previous Oxford Economics Value of Beauty research has shown, the sector already makes a substantial contribution to GDP, employment, and tax revenues across the country.

This report adds a further dimension to that evidence by showing that beauty and personal care also supports everyday wellbeing, confidence, and self-expression for a large share of consumers. For many people, these products, services, and routines are not peripheral or occasional treats. They are part of how people prepare for the day, participate in work and social life, and feel more resilient in the face of daily pressures. In that sense, the sector’s value lies not only in what it produces and sells, but also in what it enables, powering participation in opportunities, relationships, and everyday life.

The findings also show that beauty and personal care can play an important social role in reducing isolation and supporting connection. Personal care appointments often provide regular, trusted spaces for conversation, particularly for groups more exposed to loneliness or weaker day-to-day social contact. That matters not only for older consumers, but also for younger people, among whom the survey points to a striking need for spaces that support informal interaction and community connection. More broadly, the link between confidence, wellbeing, and participation suggests that the sector can help people feel more able to show up for the moments that matter, whether in social settings, in professional life, or as they seek to enter or return to work. The sector’s social value, therefore, extends beyond individual outcomes to include a wider contribution to community cohesion and inclusion.

That wider contribution is also visible at the local level. Beauty is a national industry with a local footprint, deeply embedded in high streets, town centres, and local communities across the UK, with a particularly prominent role outside the largest urban centres. Because these services are delivered in person, they generate repeat visits, sustain footfall, and support spending in neighbouring businesses. They also support jobs, skills, and livelihoods across the country, making the sector’s contribution tangible in local economies and visible in every postcode. In many towns and smaller centres, they form a core part of the local leisure and recreation offer and help maintain the vibrancy of places where other forms of activity have thinned out.

The findings of this report show that beauty and personal care should be understood not only as an important economic sector, but also as part of the social and local infrastructure of everyday life in Britain. From a policy perspective, this underlines the importance of a supportive environment for the sector so that firms can continue to grow in the UK. This means not only enabling businesses in local centres to thrive, but also ensuring that the conditions are in place for product development, business expansion and long-term investment across the wider sector, so that it can sustain its growth over time.

APPENDIX 1

CONSUMER PROFILES:

METHODOLOGICAL NOTE

In order to understand how engagement with beauty and personal care differs across the population, we developed a consumer profiling framework based on product usage, service usage, time spent on routine, and monthly expenditure.

Findings across these metrics confirm that engagement with beauty and personal care is both widespread and habitual across the population.

FRAMEWORK FOR ASSESSING ENGAGEMENT

It is, however, important to distinguish between different levels of engagement within the overall consumer base. While beauty and personal care are broadly used, not all consumers interact with these products and services in the same way or to the same extent. Some consumers use a relatively narrow range of products, spend little time and money on their routines, and make limited use of services. To capture these differences, we assessed respondents against four engagement pillars.

Each consumer received a score based on their position across the four pillars. These scores were then used to group survey respondents into one of four user profiles, reflecting increasing levels of engagement with beauty and personal care products and services. The resulting consumer profiles are as follows:

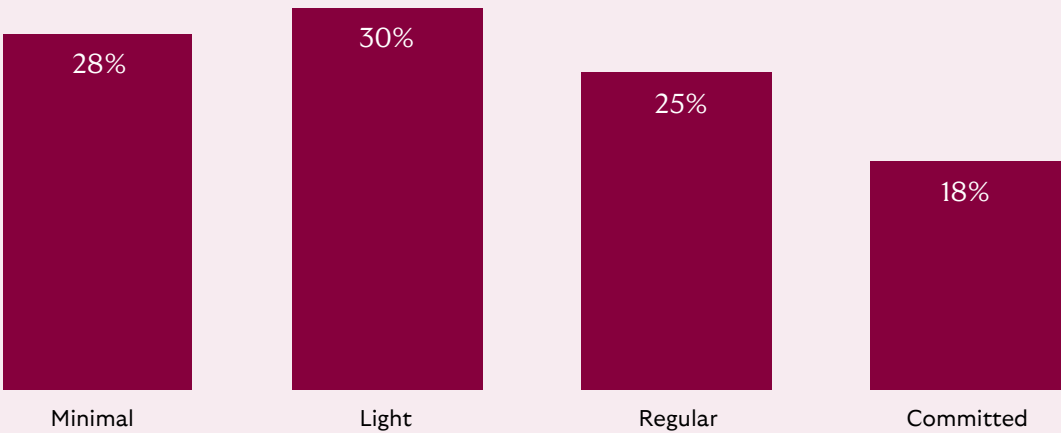
- **Minimal user:** personal care plays an incidental role outside of the use of basic hygiene products.
- **Light user:** engages in simple, low-cost daily routines and uses services occasionally.
- **Established user:** uses multiple products and regularly accesses services.
- **Committed user:** demonstrates a high level of time and monetary investment across multiple products and services.

TABLE 1: CORE METRICS OF BEAUTY AND PERSONAL CARE ENGAGEMENT

Pillar name	Description
Product usage	This pillar captures the frequency and breadth of product use.
Service usage	This pillar captures the frequency with which consumers make use of personal care services.
Spend	This pillar measures the amount that consumers spend a month on personal care products and services.
Time	This pillar captures the amount of time consumers devote to their personal care routines.

FIGURE 19: BREAKDOWN OF CONSUMER PROFILES

Source: Oxford Economics



These profiles provide a practical way of segmenting the consumer base according to their engagement. They show that beauty and personal care engagement is not confined to a narrow group of highly involved consumers but rather that the majority of respondents interact with the categories in regular ways.

At the same time, the analysis also identifies a significant minority of respondents with relatively limited engagement. Around 28% of survey respondents were classified as minimal users. For this group, beauty and personal care plays a smaller role in everyday life. This lower level of engagement is reflected across several dimensions. Minimal users were less likely to use beauty products such as make-up, skincare, and fragrance on a regular basis; use a broad range of product categories within their routine; spend more than five minutes on their beauty or personal care routine; and spend substantial amounts of money each month on beauty and personal care products and services.

One of the clearest demographic differences between the different consumer profiles is gender. The minimal user group is made up predominantly of men, with women accounting for only 26% of respondents in this segment, compared to 51% in the population as a whole. This indicates that lower levels of engagement with beauty and personal care products are disproportionately concentrated among male respondents.

The profile distribution also shows a clear progression by gender across the engagement spectrum. As one moves from minimal to light, to established and committed users, the proportion of women increases.

In contrast to gender, age does not appear to be a major differentiator across the user profiles. Across the full sample, 25% of respondents are aged under 35, and this share remains broadly consistent across the different consumer groups.

DEFINING THE RELEVANT USER BASE

Since personal care plays a more incidental role in the lives of the consumer in the minimal group, they are also less likely to have a well-developed or strongly articulated view of how beauty and personal care products and services could affect their wellbeing. This does not imply that these products and services have no relevance to them, but rather that their lower level of exposure may limit the extent to which they consciously associate beauty and personal care with other outcomes.

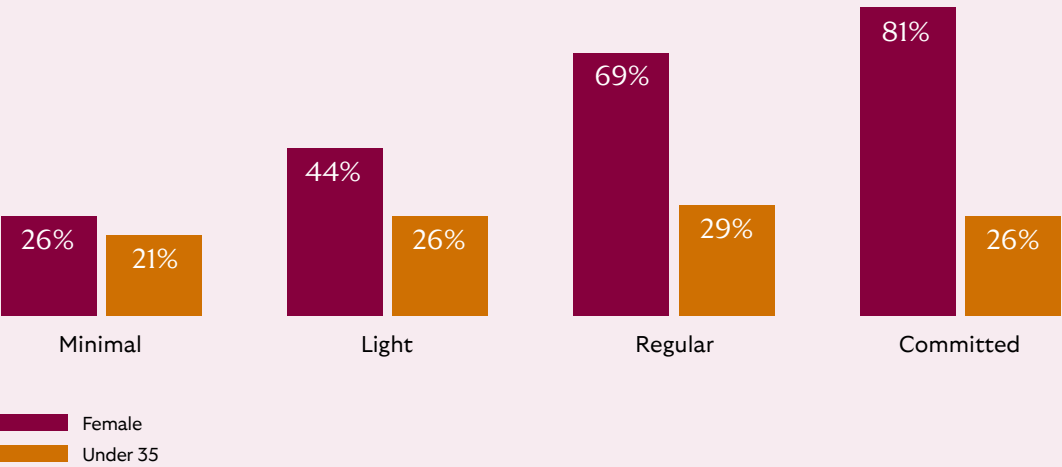
To ensure that the subsequent analysis is centred on respondents best placed to assess the relationship between beauty and personal care and measures of wellbeing, we isolated a subgroup of more frequent users. This includes light, established, and committed consumers.

These respondents who use products and services more regularly are more likely to have enough direct experience to provide meaningful insights into how beauty and personal care relate to their routines, self-perception, confidence, and wellbeing.

Importantly, focusing on this subgroup of respondents does not excessively narrow the sample. The more frequent users subgroup represents a clear majority of respondents, 72% of the sample. This means that the analysis remains rooted in the experiences of most consumers, while also ensuring that the findings are informed by those with sufficient exposure to the category to comment meaningfully on its effects.

FIGURE 20: AGE AND GENDER SHARES OF FREQUENT USER PROFILES

Source: Oxford Economics



APPENDIX 2
GEOSPATIAL ANALYSIS:
METHODOLOGICAL NOTE

This methodological note sets out the data and methods behind the geospatial analysis of personal care and beauty amenities across the UK. The analysis combines open points-of-interest (POI) data with official statistical geographies, urban/rural classifications, retail centre boundaries, and gridded population and settlement data to capture the presence and relative importance of the sector across different types of communities in the UK.

IDENTIFYING PERSONAL CARE AND
BEAUTY AMENITIES

The foundation of the analysis is the “places” dataset published by the Overture Maps Foundation,⁴² an open map data platform that consolidates place-based information from multiple open and commercial sources, including Meta, Microsoft, OpenStreetMap, and others. For this analysis, the May 2026 release was used, which was the most recent and up-to-date version at the time of the analysis.⁴³

From the “places” dataset, we started by extracting every place across the UK. The dataset contains millions of data points across the country, from different sources. Those are consolidated and combined in a single dataset using complex machine learning methods. As a quality assurance, the dataset also includes an “existence confidence score” for each data point. That confidence takes a value between 0 and 1 and represents the likelihood that a given data point still exists. A score of 0 means we are certain the place does not exist; a missing value means no confidence information is available. In our analysis, to exclude fake businesses and misplaced records, we retained only places with a confidence score of at least 0.75.

Each place carries a category from Overture’s hierarchical taxonomy⁴⁴, which we mapped to a set of broad groups such as eat and drink, active life, arts and entertainment, and beauty and spa. Places without a category were classified where possible using keyword rules applied to the business name, assigning, for example, names containing “salon”, “spa”, or “hair” to beauty and spa, and names containing “school” or “nursery” to education. Places that could not be classified in this way were excluded from the analysis.

Personal care and beauty amenities were then defined using more than 50 detailed categories. These cover the following:

- hair services (hair salons, barbers, stylists, and blow-dry services)
- beauty salons and related services (including nail salons, make-up artists, lash and brow services, and aestheticians)
- spas, saunas, and wellness services
- massage and reflexology
- cosmetic medicine, including dermatologists and cosmetic surgeons
- tanning services
- hair removal and hair replacement
- pharmacies and drugstores.

42 Overture Maps Foundation, “Places Guide”. Accessed August 2026
43 Overture Maps Foundation, “Releases”. Accessed August 2026
44 Overture Maps Foundation, “Places taxonomy”. Accessed August 2026

Reflecting the definition of personal care used elsewhere in this report, we also include retailers of personal care products: perfume, skincare, and beauty supply stores, wig stores, health food and vitamin stores, department stores and superstores, and grocers. This yields approximately 191,200 personal care and beauty amenities across the UK, which we group into subsectors for reporting.

- The “Hair and beauty salons” category includes all hair and beauty services, such as hair salons, barbers, stylists, blow-dry services, nail salons, make-up artists, lash and brow services, aestheticians, and so on.
- The “Retail category” includes predominantly beauty supply stores and include department stores, shopping centres, beauty retailers, perfume stores, skin care stores, cosmetic and beauty supply stores, hair extension and accessory stores, wig stores.
- The “Other category” includes spas and saunas, massage services, tanning services, hair removal and replacement services, cosmetic medicine services, as well as some retail categories such as grocers and pharmacies that offer products beyond beauty and personal care.

DEFINING LEISURE AND RECREATION

We benchmark the personal care and beauty sector against the wider leisure and recreation economy. In addition to personal care and beauty amenities, this leisure and recreation comparison set also comprises the following categories:

- hospitality, split into restaurants, cafés, pubs, and bars using keyword rules
- exercise and lifestyle amenities such as gyms, fitness studios, and sports facilities
- arts and entertainment venues
- and other attractions and activities.

The sector’s share of leisure and recreation is calculated as the number of personal care and beauty amenities divided by the total number of leisure and recreation amenities, including personal care itself.

It is worth noting that a small number of categories that would seem eligible for the leisure and recreation category were excluded from the comparison set. Those include, for example, adult entertainment, betting and gambling venues, or psychic services.

GEOGRAPHIES AND THE URBAN–RURAL CLASSIFICATION

Every amenity was assigned to statistical geographies using a point-in-polygon match. The analysis draws on around 9,433 small statistical areas across the UK. Namely, they include Middle-layer Super Output Areas in England and Wales, Intermediate Zones in Scotland, and Super Output Areas in Northern Ireland. We additionally performed the same analysis using 650 parliamentary constituencies on 2024 boundaries and England’s combined authorities on 2025 boundaries. Greater London figures aggregate its 33 local authorities. Finer-grained layers, including Lower-layer Super Output Areas and Data Zones, were also processed to test the sensitivity of the results.

Each area was flagged as predominantly urban or predominantly rural. In England and Wales, we use the Office for National Statistics’ 2021 rural/urban classification⁴⁵. In Scotland, the Scottish Government’s eightfold 2022 urban/rural classification⁴⁶ was collapsed into a binary flag based on the population-weighted share of each zone falling within urban and rural classes, with population weights drawn from the Global Human Settlement Layer (GHSL)⁴⁷ population grid. In Northern Ireland, areas were classified using population-weighted degree-of-urbanisation classes from the GHSL settlement model. Population denominators for per-capita measures were aggregated from the GHSL population grid (GHS-POP, 2025 epoch).

HIGH STREETS AND RETAIL ZONES

The high street analysis draws on around 6,400 open retail centre boundaries produced by the Consumer Data Research Centre and Ordnance Survey⁴⁸. Those are classified by type, including:

- Small Local Centres (Retail centres with under 100 units)
- Local Centres (Retail centres with under 150 units)
- District Centres (Not the largest centres within a built-up area, but have at least 150 retail units)
- Market Town Centres (Largest centres in the respective built-up areas with at least 150 retail units)
- Town Centres (Large retail centres. Largest in the local authority or within the ceremonial county, with at least 250–350 units)
- Major Town Centres (Significantly large retail centres. Largest in the ceremonial county with a minimum of 350 retail units)
- Regional Centres (Largest retail centres in the broader administrative region)
- Small Retail Parks (Small local retail centres which are designated as retail parks with under 50 units)
- Large Retail Parks (Small local retail centres which are designated as retail parks with 50–100 units)
- Small Shopping Centres (Smaller out-of-town shopping centres and outlets)
- Large Shopping Centres (Larger out-of-town shopping centres and outlets)

Small local centres and local centres are subsequently reclassified as “small high streets”. District centres and market towns are reclassified as “medium high streets”. Major town centres, regional centres, and town centres are reclassified as “large high streets”. Small and large retail parks are grouped as “retail parks”, and small and large shopping centres are grouped as “shopping centres”. Each boundary was buffered by 100 metres so that premises fronting onto, but sitting just outside, strict retail zone boundaries are also captured. A gridded estimate of the 2021 workday population was used to contextualise daytime footfall in each zone.

DEGREE OF URBANISATION

To look beyond administrative boundaries, every amenity was also assigned to a settlement class from the GHSL settlement model (GHS-SMOD),⁴⁹ which classifies one-kilometre grid cells by population size and density. The model distinguishes:

- urban centres and major cities
- dense and semi-dense urban clusters, such as small and medium-sized towns
- suburban or peri-urban areas
- rural clusters, which capture villages
- and low-density and very low-density rural areas.

45 Office for National Statistics, 2026. “2021 Rural Urban Classification”. Accessed August 2026.
46 Scottish Government, 2024. “Scottish Government Urban Rural Classification 2022”. Accessed August 2026.
47 European Commission, Joint Research Centre, 2023. Global Human Settlement Layer POP, “Population Grid”. Accessed August 2026.

48 Geographic Data Service, 2022. Retail Centre Boundaries, Catchments, Typology and Open Indicators (2022). Accessed August 2026.
49 European Commission, Joint Research Centre, 2023. Global Human Settlement Layer SMOD, “Degree of Urbanisation”. Accessed August 2026.

APPENDIX 3

UK PARLIAMENTARY CONSTITUENCIES

The following section presents the rankings of UK parliamentary constituencies in terms of the number of personal care and beauty amenities per 1,000 residents, as well as in terms of the share of personal care and beauty relative to all leisure and recreation amenities.

PARLIAMENTARY CONSTITUENCIES WITH MORE THAN FOUR PERSONAL CARE AND BEAUTY AMENITIES PER 1,000 RESIDENTS

Parliamentary constituency code	Parliamentary constituency name	Number of personal care and beauty amenities per 1,000 residents	Rank
E14001172	Cities of London and Westminster	17.07	1
S14000085	Glasgow North	6.69	2
E14001352	Manchester Central	6.69	3
E14001290	Holborn and St Pancras	5.55	4
E14001319	Leeds Central and Headingley	5.46	5
E14001131	Bristol Central	5.21	6
S14000079	Edinburgh North and Leith	5.08	7
S14000084	Glasgow East	5.08	8
E14001163	Chester North and Neston	5.04	9
E14001409	Norwich South	4.96	10
S14000061	Aberdeen South	4.89	11
E14001310	Kensington and Bayswater	4.87	12
N05000003	Belfast South and Mid Down	4.74	13
E14001410	Nottingham East	4.70	14
E14001467	Sheffield Central	4.68	15
E14001338	Liverpool Riverside	4.61	16
E14001161	Cheltenham	4.61	17
E14001566	Warwick and Leamington	4.45	18
E14001130	Brighton Pavilion	4.42	19
E14001231	Exeter	4.41	20
E14001349	Maidstone and Maidstone	4.36	21
E14001406	Northampton North	4.26	22

Parliamentary constituency code	Parliamentary constituency name	Number of personal care and beauty amenities per 1,000 residents	Rank
E14001565	Warrington South	4.26	23
E14001269	Harrogate and Knaresborough	4.25	24
E14001159	Chelmsford	4.25	25
E14001315	Kingston upon Hull West and Haltemprice	4.20	26
E14001096	Birmingham Ladywood	4.18	27
E14001178	Congleton	4.11	28
E14001080	Bath	4.10	29
E14001306	Islington South and Finsbury	4.08	30
E14001539	Tatton	4.05	31
E14001551	Torbay	4.01	32

PARLIAMENTARY CONSTITUENCIES WHERE PERSONAL CARE AND BEAUTY ACCOUNTS FOR MORE THAN 35% OF ALL LEISURE AND RECREATION.

Parliamentary constituency code	Parliamentary constituency name	Share of personal care and beauty amenities relative to all leisure and recreation	Rank
E14001408	Norwich North	40.8%	1
N05000010	Mid Ulster	40.1%	2
N05000011	Newry and Armagh	38.9%	3
N05000017	Upper Bann	38.6%	4
E14001233	Fareham and Waterlooville	37.7%	5
S14000099	Motherwell, Wishaw and Carluke	37.6%	6
E14001112	Bolton West	37.5%	7
N05000018	West Tyrone	37.2%	8
E14001244	Gateshead Central and Whickham	37.2%	9
S14000097	Mid Dunbartonshire	37.1%	10
E14001158	Cheadle	37.0%	11
N05000009	Lagan Valley	36.8%	12
E14001355	Mansfield	36.7%	13
E14001379	Newcastle upon Tyne North	36.6%	14
E14001487	South Holland and The Deepings	36.6%	15
E14001349	Maidstone and Malling	36.5%	16
S14000083	Falkirk	36.5%	17
E14001245	Gedling	36.5%	18
E14001159	Chelmsford	36.4%	19
E14001092	Birmingham Edgbaston	36.3%	20
S14000104	Rutherglen	36.1%	21
E14001437	Rayleigh and Wickford	36.1%	22
E14001115	Bournemouth East	36.1%	23
N05000012	North Antrim	36.1%	24
E14001535	Sutton Coldfield	36.0%	25
E14001479	Solihull West and Shirley	35.9%	26
S14000063	Airdrie and Shotts	35.8%	27
E14001596	Wolverhampton West	35.8%	28
E14001185	Crewe and Nantwich	35.7%	29
E14001406	Northampton North	35.7%	30
E14001426	Plymouth Moor View	35.6%	31

Parliamentary constituency code	Parliamentary constituency name	Share of personal care and beauty amenities relative to all leisure and recreation	Rank
E14001246	Gillingham and Rainham	35.6%	32
S14000021	East Renfrewshire	35.5%	33
E14001110	Bolton North East	35.5%	34
E14001065	Altrincham and Sale West	35.5%	35
E14001286	Heywood and Middleton North	35.3%	36
E14001491	South Ribble	35.3%	37
E14001322	Leeds North West	35.3%	38
N05000014	South Antrim	35.3%	39
E14001093	Birmingham Erdington	35.3%	40
E14001451	Rother Valley	35.2%	41
E14001190	Darlington	35.2%	42
E14001133	Bristol North East	35.2%	43
E14001134	Bristol North West	35.2%	44
E14001266	Harborough, Oadby and Wigston	35.1%	45
S14000087	Glasgow South	35.1%	46
E14001165	Chesterfield	35.1%	47
E14001222	Ellesmere Port and Bromborough	35.1%	48
E14001339	Liverpool Walton	35.0%	49
N05000007	Fermanagh and South Tyrone	35.0%	50
E14001186			
Croydon East	35.0%	51	
E14001095	Birmingham Hodge Hill and Solihull North	35.0%	52

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