



# The Treatwell Trend Report

Autumn 2019



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A close-up photograph of a hand with a manicure. The thumb, index, and middle fingers have a light pink polish with a black half-moon design at the base. The ring and pinky fingers have a solid light pink polish. The hand is positioned on the left side of the frame, with fingers slightly spread. The background is a solid, vibrant orange color.

# Welcome.

It's a big time for beauty and it's only getting bigger. Customers are spending more on their hair and beauty treatments than ever. By 2024, the worldwide salon industry will be worth an estimated £145 billion.

For an already fast-moving business with new trends and treatments coming and going thick and fast, entering an ever more digital-savvy, online world means that's never been more true than now.

These aren't flash-in-the-pan trends, either; the way people are interacting with the whole concept of beauty is rapidly changing. More consumers than ever are following their ethics. Treatments for once-elusive male

clients are booming across the board. Technology is speeding up the way customers approach everything - including how they book their treatments.

That's a lot of change. But big changes mean big opportunities. To help you stay on top of what's happening in your beauty industry, we've compiled this special report, based on our huge info database here at Treatwell.

So you can head into the big, bad world of 2019 and beyond armed with everything you need to know about how your customers are booking their beauty.

# Looking backward.

With 2018 behind us and already fast fading into the distance, let's take a look in the rear-view at some of last year's best bits.

Looking back on it now, 2018 feels like a bit of turbulent year for the UK, with the drama of Brexit bringing us more political ups and downs, the joy and heartbreak of the World Cup, and some serious weather highs and lows, the likes of which we haven't seen for years.

It was also a big year for the way that customers interacted with their favourite salons, stepping away from calling and into a more connected world.

What were the biggest takeaways from last year?



# How customers booked their beauty in 2018



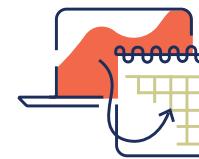
## From the palm of their hand

A massive 77% of our customers booked their treatments on their mobiles - either on our website or via the app.



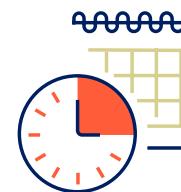
## A different kind of rush hour

6pm was our most-searched for treatment time slot: beauty bookers hungry for post-work treats.



## Weekend-ready

Friday and Saturday mornings were the most popular times for customers browsing and booking treatments.



## Change of plan

People love things to be last-minute. 39% of our customer bookings were made under 24 hours before the treatment starts.



# 2018 in moments

From start to finish - here were the biggest winners over the course of last year.

# The year's biggest hits



Who were 2018's biggest beauty winners?

## Men's Brazilian blow dry +287%

Salons saw the hair treatment for men surge in popularity, as more men get involved in booking beauty treatments. It's the more 'gentle' way to straighten hair, without impacting its texture, or causing damage.

## Cryotherapy +246%

The use of extremely cold temperatures to reduce inflammation, burn calories and reduce signs of aging is starting to become more mainstream.

## Microneedling +127%

The new use of extremely cold temperatures to reduce inflammation, burn calories and reduce signs of ageing has found its way into more treatment centres, becoming more mainstream.

## Brows & lash treatments

### Microblading +503%

The trend for fuller brows continued to impact the popularity of microblading – a semi-permanent brow re-shaping treatment that lasts up to a year.

## Eyebrow waxing +124%

Waxing prevails as a popular choice for customers looking for the perfect arch.

## Eyelash Extensions +101%

Consumers were still looking for instantly longer lashes (the 'old-fashioned' way) with improved techniques and better quality lashes.

## Hair removal treatments

### Threading +127%

The more precise way to remove hair – particularly for more sensitive areas like eyebrows and upper lips – keeps on growing popularity with consumers.

### Sugaring +240%

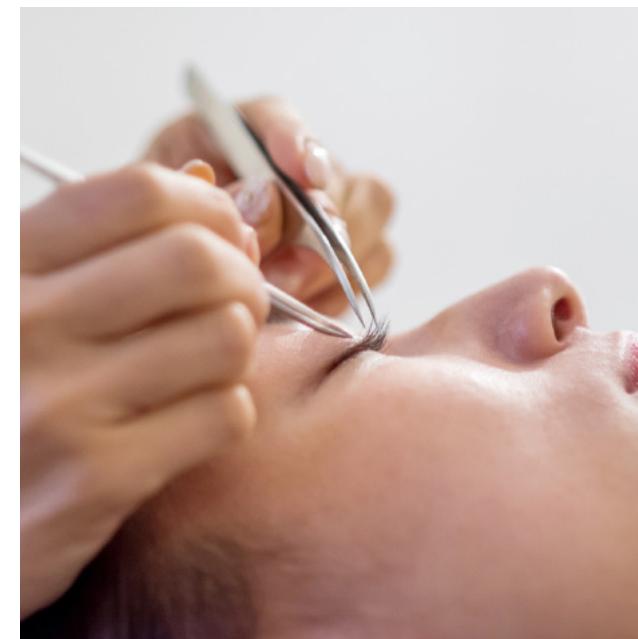
The popularity of veganism continues to grow, in both food and now beauty. The vegan answer to hair removal is both kinder to the skin and is cruelty-free.

### Beard Trimming +153%

Now at an all time high, beard trimming is becoming more ubiquitous as the modern gentleman opts for the salon treatment.

## Honourable mention:

Gel nails +231%



# Highlights of the year

**January**  
New year,  
new clients



Always associated with detoxing and the post-Christmas comedown, there was a renewed public interest in wellness, with customers lining up for treatments to practice a bit of self-care.

Massages saw a **+70% YoY** increase - especially Deep Tissue Massage, which grew by **+50% YoY**.

Nail treatments saw a **+101% YoY** increase, with more affordable treatments rising in popularity.

**February**  
Valentine's Day



As much as people like to scoff about the commercialism of February 14th, it doesn't seem to stop them getting ready for it - we saw hair removal treatments peak in February.

Two weeks before Valentine's Day, bikini wax bookings increased by **+221%**, Hollywood waxes by **+111%**, Brazilians by **+98%**

Leg waxing jumped by **+104%**

**March**  
Beast from the East



Just when we thought winter was over, the 'Beast from the East' arrived in the UK, with all its cold-weather drama. Things remained positively frosty until mid-March, which had a knock-on effect on the types of treatments being booked.

Spray tans climbed **+36% YoY** in a bid to fake a bit of sunshine.

On the flip-side, waxing was down **-52% YoY** as people remained thoroughly wrapped up in their winter wardrobe.

**April**  
Spring



Spring finally arrives. On the first truly sunny day of the year, 18th April, the temperature hit 23-26 degrees in London.

Shorts on - leg waxing peaked with a **+683% WoW** growth from the first week in April, to the third week.

Pedicures also saw a **+671%** increase during the same time period.

**May**  
The Royal  
Wedding



Royal Wedding Fever

The Royal Wedding gave British beauty bookers something joyful to celebrate (finally).

Traffic to our UK blog hit record ratings on Markle-themed content, while her glowing skin got customers booking beauty too: the next week saw over 9 times more (**+951%** to be exact) facial bookings.

**June**  
Love Island



ITV2's Love Island returned to take its place as the crown jewel summer reality TV (not to mention workplace conversation), and saw almost three million viewers tune in to the first episode. In fact, our Treatwell ad campaign during the run nearly overloaded our app... nearly.

During the 6 weeks of air-time:

Bookings for eyelash extensions increased by **+40%**, while shellac manis were up by **+60%**.

Male-specific treatments were on the rise too, with facials growing by **+40%** and waxing by **+30%**.



## Pro-tip:

**YoY:** Year on year growth - the increase from one year to the next

**MoM:** Month on month growth - the increase from one month to the next

# Highlights of the year



## July The World Cup

Football fans, pub-lovers, everyone, in fact – the whole of the UK got caught up in the World Cup. The earlier games saw very little change in the usual salon bookings, but fast-forward to the 7th July win against Sweden and our traffic dropped down -31% YoY as all eyes were glued to the TV..

During the tense semi-final game against Croatia, traffic dropped even further: -35% YoY. And they say it's 'just a game'.

## August Summer



The UK's hottest ever summer on record, with a peak temperature of 35.3C reached on 26th July, in Kent.

Bookings for gel nails were up +150% YoY, pedicures +103% YoY and eyelash extensions +78% YoY.

Hot weather trends also included men's Brazilian blow dries up +220% YoY, sugaring +206% YoY and micro-blading +173% YoY.

## September Express treatment, big feels



Beauty bookers are busy people. Between eating lunches at their desk and skipping meals entirely, Brits lose as much as six weeks extra a year by not taking their lunch break. So, we made it our mission to remind fellow busy people that it's important to take some 'you time' with our Express Treatments campaign. It worked.

The campaign drove **25,000** express manicure bookings and **33,000** express Hollywood waxes.

## October Environmentalism



As conscious beautifiers continue to gear toward a more organic (and ethical) lifestyle, sugaring gained popularity as a natural alternative to waxing.

We welcomed the return of Top Rated – encouraging customers to vote for their favourite salons, and discovering hidden gems around the UK. We headed to these venues to celebrate their Top Rated Salon status.

Male grooming was also on the agenda – the end of the month saw male customers peaking on beard trim bookings, potentially prepping for the arrival of November.

## November Deal season



November has a tendency to sneak up on us - Treatwell always sees record numbers of bookings just before the festive season kicks off in earnest: Black Friday, Cyber Monday, and the start of a never-ending stream of office parties.

## December Christmas cheer



Gifting season rolls round again. Each year, we see a bit of a drop off around the festive period as beauty customers spend time with their families...

... except for a spike in spa & treatment bookings on the 22nd and 23rd. Last-minute gifts, anyone?



## Did you know?

Our partners can set online smart discounts on services during quiet periods, to get the most out of every slot you've got available. Bye-bye, dead December days.

Visit [treatwell.co.uk/welcome](https://treatwell.co.uk/welcome) to learn more.

# Our regions in review

Which city loves a Hollywood wax? Where's the top spot in London for a spray tan?  
Here's a little regional break down for you.



**Glasgow**  
We saw the highest ratio of standard bikini waxing in the north of the UK, particularly in Stockport (30%) York (26%) and Glasgow (20%). Across all cities, Glasgow book LVL lashes most frequently (making up 13% of the ratio). With LVL still a growing treatment.

**Liverpool**  
Lovers of lash and brow treatments. Tinting and extensions made up 65% of bookings in Liverpool. 33% of hair bookings were blow dries. 10% of all 'face' related bookings are makeup treatments (this was 0% for East London).

**Manchester**  
Mancunians loved a blow dry - accounting for 20% of all hair bookings. 21% of nail bookings were for an acrylic manicure.

**Birmingham**  
Outside of London, Birmingham and Sheffield were fans of the Hollywood waxing style, making up over 65% of bikini waxing appointments.





# Two steps forward (& no steps back).

2018 was good for beauty. But what happens next?

2019 is here, and things are showing no signs of slowing down, as the salon industry's digital revolution continues to pick up steam. Beauty consumers are booking online in droves and they're doing it through their phone - looking for on-trend treatments at times that work for them.

That's great news for smart business owners. More and more customers booking online means even more opportunities to show those browsers and bookers just what you're bringing to the table - especially if it's what they want right now.

Keeping an eye on the horizon is important for any business, but that's even more true for the salon industry, where customers' priorities and fashion choices can change at breakneck speed. Let's take a look at how the landscape is shifting this year.

# 2019's new customer

## A new priority: **Ethics**

Treatments aren't the only things that change for salons. Customers do too.

Last year saw a huge rise in the popularity of a plant-based, non-ecologically destructive lifestyle, and consumers are crying out for more vegan, cruelty-free and eco-friendly products to be offered by their favourite salons and used in treatments that don't (in a very real sense) cost the Earth.

This is a new kind of customer: one that follows their ethics, and not just their wallet.

They keep a firm track on their carbon footprint, their beauty regime is powered by choices that are good for the environment, and drawn tightly to brands that share similar values.

For the beauty industry, this means offering products, treatments and salons that are **sustainable, cruelty-free, non-toxic and eco-friendly.**

Think henna brows instead of HD. Non-chemical hair dye. Vegan nail polish. Making small switches to their beauty regime and lifestyle, will have impact. It's up to you to make sure you're helping them.

### Last year:

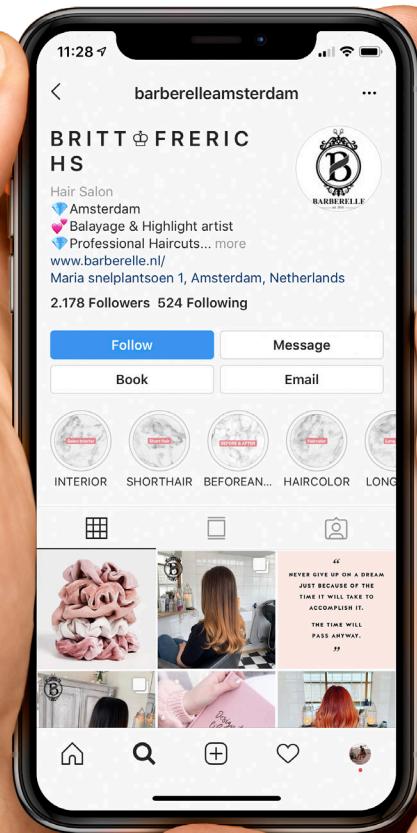
**3.5 million:** The number of Brits now identifying as vegan.

**+240% more sugaring, the natural alternative to hair removal.** The treatment that applies an organic solution of lemon juice, sugar and water to remove hair from the root - no harsh petrochemicals or polymers in sight.



With Treatwell, people can book a treatment with you online, straight from your social media profiles. It's just one of the ways we make the beauty business booking experience brighter for everyone - you and your clients.

Visit [treatwell.co.uk/welcome](https://treatwell.co.uk/welcome) to learn more.



## Tech-enabled

Technology is moving at an incredibly fast rate, transforming the landscape of whole industries left, right and centre - and as far as most of us are concerned it's happening right in the palm of our hand, in the form of the humble smartphone.

Over the last few years, we've seen an explosion of new ways that technology and the online world has changed the way that customers interact with their businesses of choice - just look at Deliveroo for food delivery, or Uber for getting around.

In addition, social media grows more ubiquitous with each passing month - did you know Instagram has over a billion monthly users, these days? Or 70% of its users are actively interacting with brands on it? It's a totally new but incredibly important way to bridge the gap between customer and business - digitally.

For the beauty industry, that means being bookable 24/7, anytime and anyplace - whenever your customers have a spare 5 minutes. It means making the customer experience as quick and intuitive as possible.

The consumer of 2019 isn't up for waiting until 9am to call their favourite salon anymore. They book fast, they book now, and they book online.

**1,000,000,000:** monthly Instagram users in summer 2018

**47%:** bookings made outside of salon opening hours

# The rise and rise of men's beauty

Societal norms have been steadily shifting in the last decade, resulting in a more gender-fluid and accepting attitude towards men who love grooming and beauty products just as much as women do.

Historically, it's been a bit of a touchy subject, shaped by centuries of gender stereotyping (a hangover we're still struggling through). Thankfully, we've come a long way from the days when beauty was believed to be the sole reserve of women. Already rising, the global male grooming market is projected to be worth \$78 billion USD by 2023 (that's with a 'B'). Those are some serious numbers.

Of course, as society's views on gender and the concept of beauty evolve, so does the beauty industry. No longer are millennial men subscribed to a regimented 'masculine' construct – the very idea of what masculinity is is changing, and mens' booking trends reflect it. It turns out that feeling good is (surprise) for everyone.

Not only have we seen a growth in traditional haircut bookings and beard trims, we've seen more 'self-indulgent' treatments too – facials and Brazilian blow dries, to name two. Self-care is finally becoming a priority for all, so make sure you're ready for an influx of male customers.

## Last year:

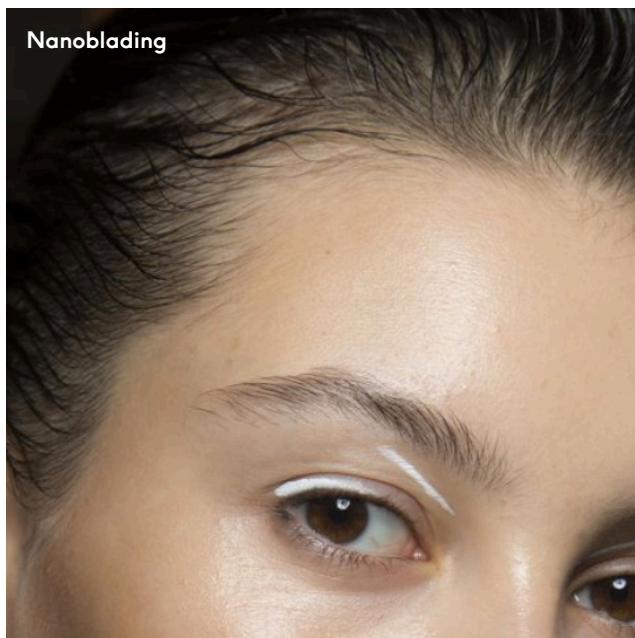
Men's haircuts were up  
**+47% YoY**

Men's facials **+10%**

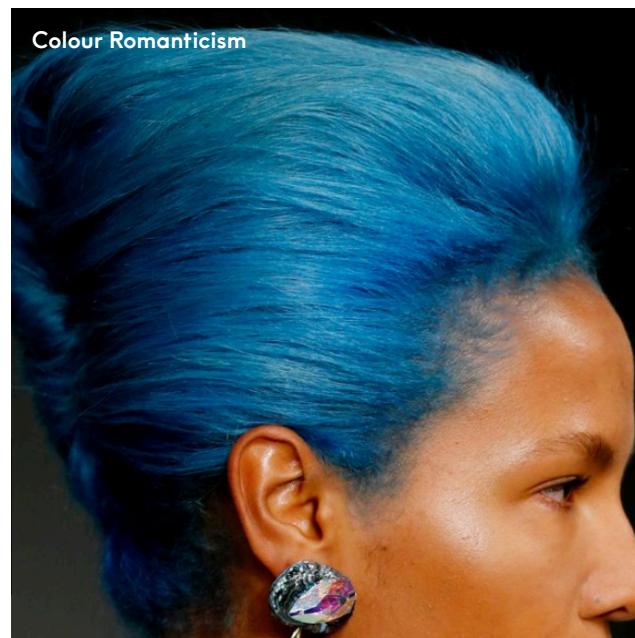
Men's hair colouring **+81%**

Men's brazilian blow  
dries **+287%**

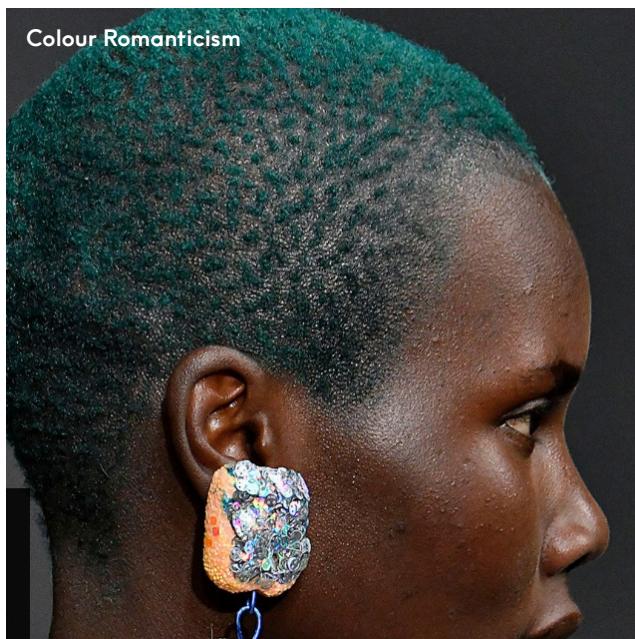




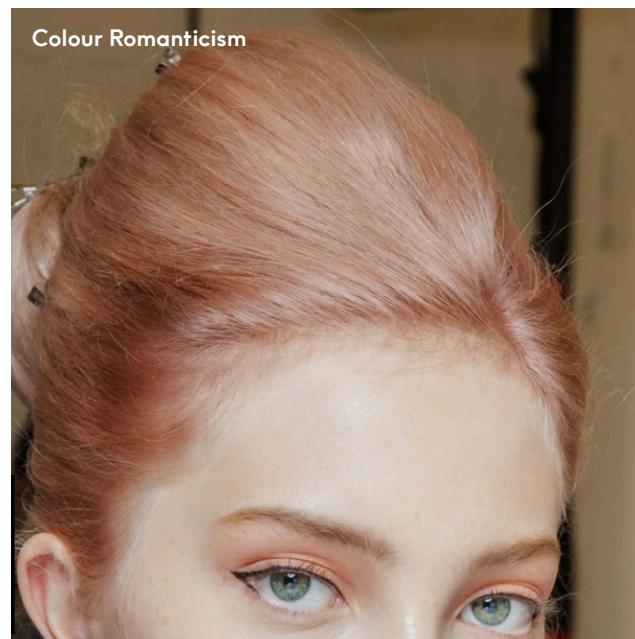
Nanoblading



Colour Romanticism



Colour Romanticism



Colour Romanticism

## Top trends for 2019

Big, sweeping changes are all well and good, but what about what's big tomorrow? Let's look into the micro-trends happening right now, and what you might want to keep an eye on in the next few months.

### Hair

**Colour:** 'Colour Romanticism' arrives for 2019; all-over experimental hair colour in 'sophisticated' hues. Block shades of rich emerald greens, luxe metallic blues, and romantic rose pinks. Marie Antoinette meets Nicki Minaj.

**Style:** 2018 saw a surge in the boyfriend bob cut and 'glass hair' (think Jenna Dewan, Bella Hadid and Dua Lipa). We predict more androgyny in the salon chair this year, from retro-chic bobs, to modified bowl-cuts, as spotted on YSL'S SS19 catwalk.

### Nanoblading

The next generation of microblading – a semi-permanent form of cosmetic tattooing. Nanoblading involves the same technique, but with super fine, flexible needles. This allows for a more 'natural' look, achieved with further precision and accuracy. With microblading bookings up +503% YoY, the nano-needle version may be next year's big hit.

As for style, think natural-look bushy brows, with definition at the arches, and hairs brushed upward.

## Nails

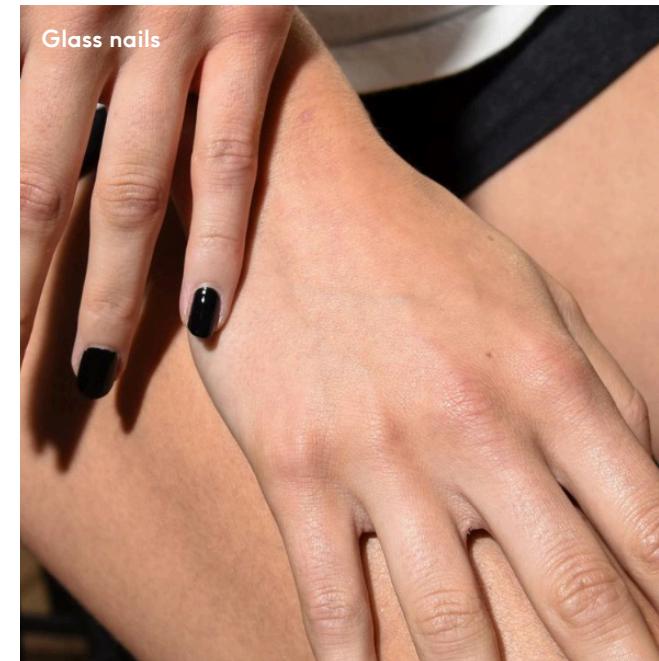
**Custom manicures:** A trend on the catwalk, and real life – nails that defy conformity, to celebrate personality instead. Visits to your salon become real conversations, as consumers ditch the everyday ‘average’ manicure in favour of complete customisation, adding a personal touch to their nail beds. Think decorative prints or lettering. Nail jewellery will remain on the scene too.

**Glass nails:** The jelly manicure gained popularity in 2018, with Kylie Jenner spotted with Perspex-look nails. Expect to see the trend continuing into next year, as transparent tips debuted on Vivienne Westwood’s SS19 catwalk.

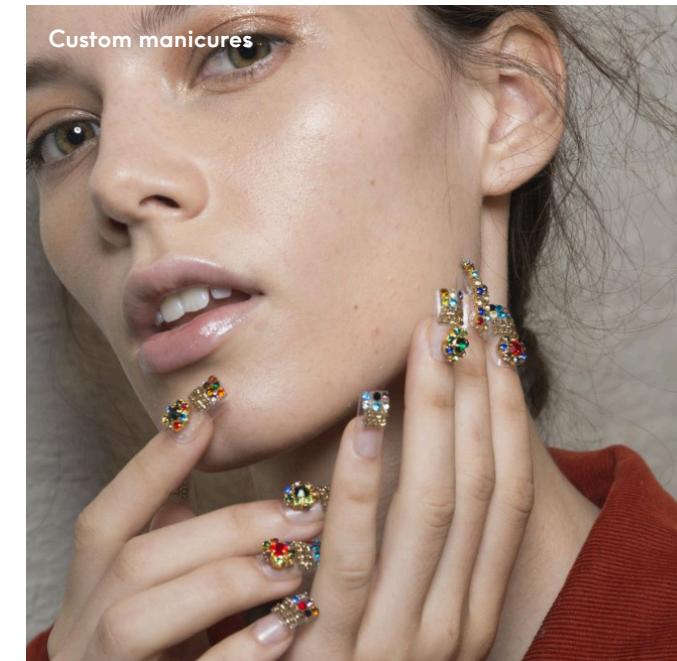
## Hair removal

**Sugaring:** As we mentioned earlier, the rise of the plant-based lifestyle is showing no signs of slowing down, and sugaring is a perfect example of what that looks like for the beauty industry. Sugaring involves applying a cocktail of lemon juice, sugar and water to the skin that removes hair from the root - with nary a chemical in sight.

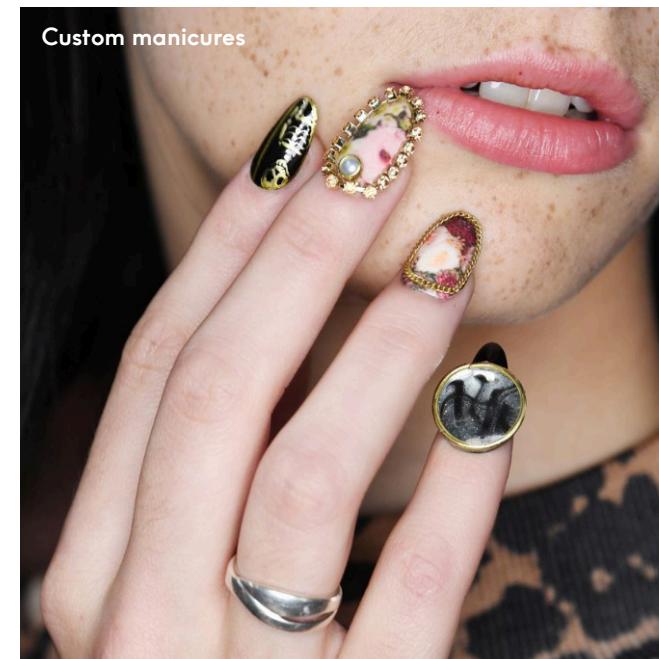
Expect to see this popping up everywhere in 2019 - it jumped +240% last year, and is only getting bigger.



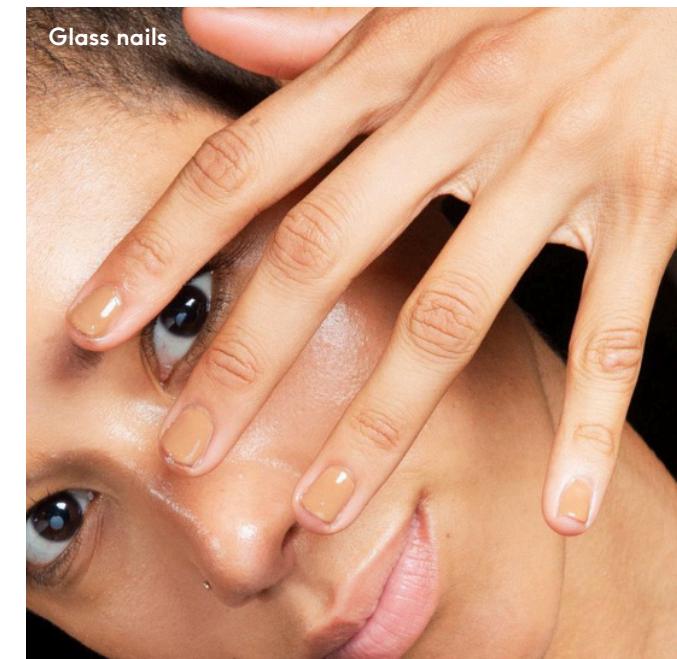
Glass nails



Custom manicures



Custom manicures



Glass nails

## Men's Hair & Grooming

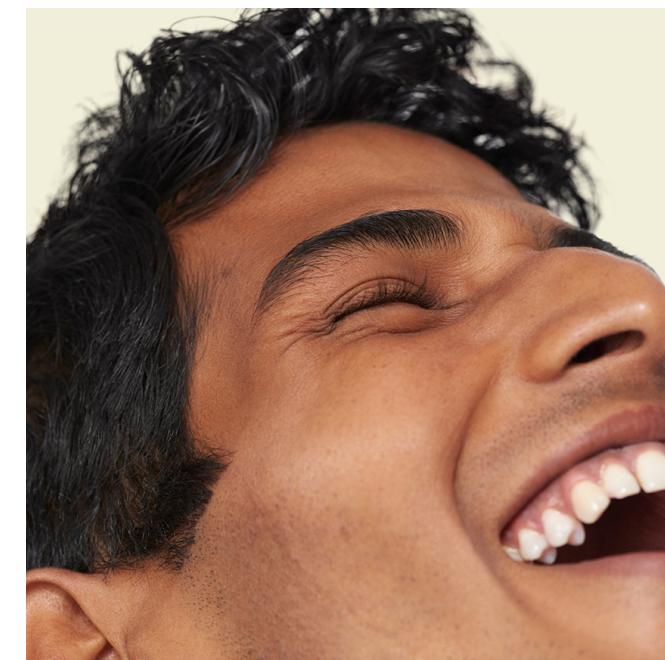
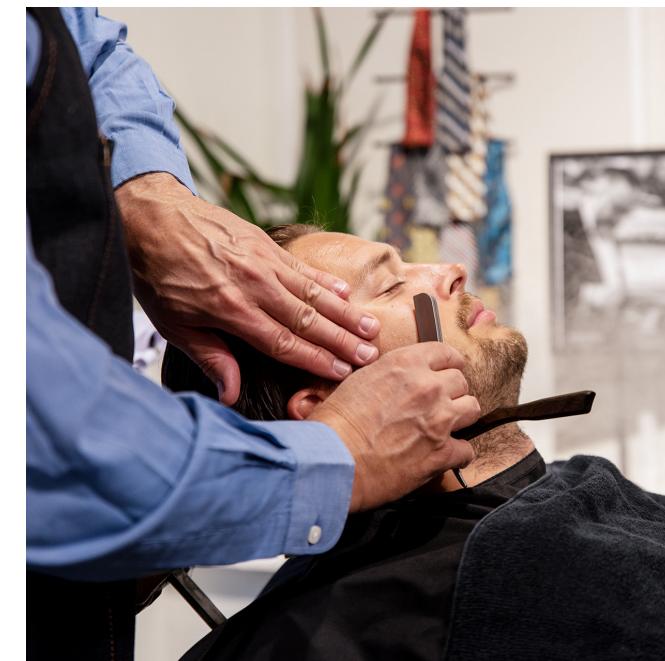
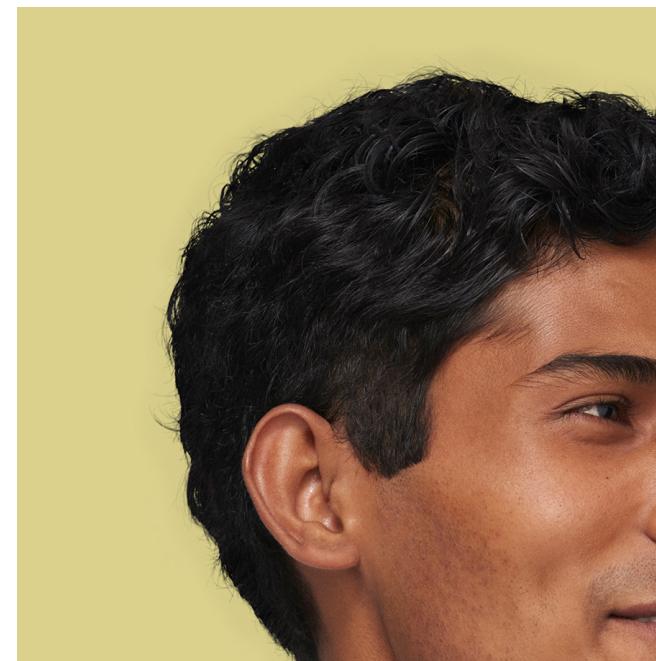
**Blow dries for blokes:** Absolutely one of last year's top risers in the beauty industry, the brazilian blow dry will only pick up steam as more and more men get involved in booking themselves beauty treatments. Straighter hair without the time investment and damage of constantly applying heat? No brainer.

**Even more beard trimming:** As our increased numbers of men seeking professional help with their facial hair last year (153%!) suggests, the bushy, hipster beard looks like its way out. Instead, expect to be treating men looking for a more controlled, cleaner, and more stylised look.

## Body & massage

**Deep tissue:** Gone are the days of working 9-to-5, for plenty of beauty bookers. A whole new world of fitting healthy and active lifestyles into a hectic work week has spawned a renewed interest in recovering properly with deep tissue massage - an interest that looks set to continue into next year; customers are taking their wellness seriously this year.

**Quick fixes:** As the trend for customers taking part a little 'me-time' and looking after their general wellbeing continues to grow, expect to be seeing even more lunchtime visits to the massage chair. Powered by the ease of booking online and popping around the corner at the drop of a hat, expect 15-min massages to keep booming in 2019.





# Future trends

Okay, let's zoom out. How are consumer attitudes to their beauty treatments changing in the long run? These are the things you'll want to keep an eye on if you want your salon to be ready for the industry's next big steps.



## Sci-fi beauty

From Estée Lauder's first-ever Hackathon (gathering global minds to innovate the future of beauty), to the launch of L'Oréal's La Roche-Posay My Skin Track UV, a wearable tech device committed to skin and sun-safety, technology-meets-beauty is an exciting space right now.

### **Personalisation:**

Products that change with who uses them. Think hair products tailored to the condition of your customers' locks, and customisable skincare you can recommend for them.

### **Try before you buy:**

3D printing allows for makeup and skincare products to be created at home, while augmented reality will mean you get to help your customers 'try on' other beauty looks before committing to a change.

### **Replacement:**

Expect everyday skincare regimes to become a little more technical, with high-tech devices replacing traditional products. Light therapy usurping wrinkle cream, to name one. Time to stock up.

## Skincare

This year, 'skin-vestment' is the priority – moving beyond a daily Korean-style 5-step programme, customers will start introducing supplements to their skincare.

Skin-rejuvenating, collagen-enhancing, pollution-fighting and anti-ageing nutrients found within day and night capsules will cater to the adapting needs of their skin.

## Caring for the environment

The moment for refillable beauty products is now, as consumers demand a more ecologically-friendly answer from the beauty industry to the issue of plastic pollution. Kiehls, Le Labo, and Rituals are amidst the brands that offer refillable packaging (with money off, or discounts given for doing so).

As organic beauty continues to gain momentum, expect to see a real emphasis on the ingredients found within your everyday products



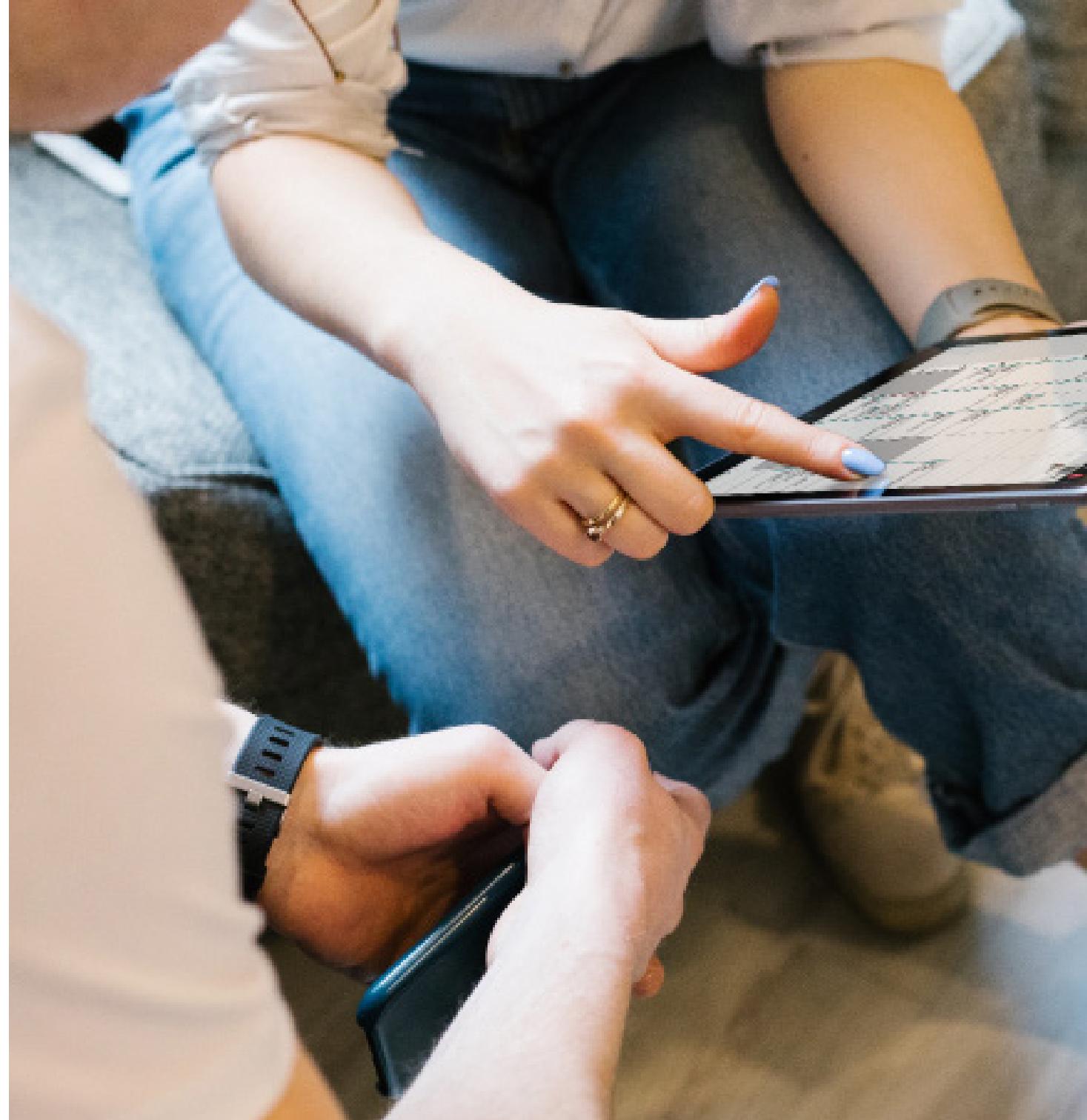
# Our partnership

Working with Treatwell isn't just about boosting your business today. It's about investing in the future of the entire industry.

More customers are moving online to meet their beauty treatment needs every day. That's great news for smart salons - it's never been easier to take advantage of all the benefits of the digital world.

We help our partners to grow their businesses by creating the best experience for salons and customers alike, so the beauty industry can continue to flourish. We give you the tools you need to get more bookings, increase your customer loyalty and manage your salon smoother than ever with our all-in-one management system, Connect - so you can stay future-proof.

Visit [www.treatwell.co.uk/welcome](http://www.treatwell.co.uk/welcome) to learn more.



# Don't just take our word for it:

Our partners continue to be the driving force behind this industry. Their impact on local community and contribution to the economy is significantly undervalued. That's why Treatwell has signed up to become a founding patron of the newly formed British Beauty Council, an organisation that seeks to represent the voices, opinions and needs of the British beauty industry. This includes the thousands of individual salons across our country.

## Lash Secret - Aldgate

"After some hesitation, we decided to sign up with Treatwell and it's the best decision we have made. Our client base has dramatically increased and the added incentives from Treatwell (to leave reviews and book again with us) are fantastic. The startup and account staff make the whole process so easy, and are always on hand to help when we need it. We couldn't recommend them highly enough for anyone thinking of using them!"

## Sam King Massage Therapy - Clapham

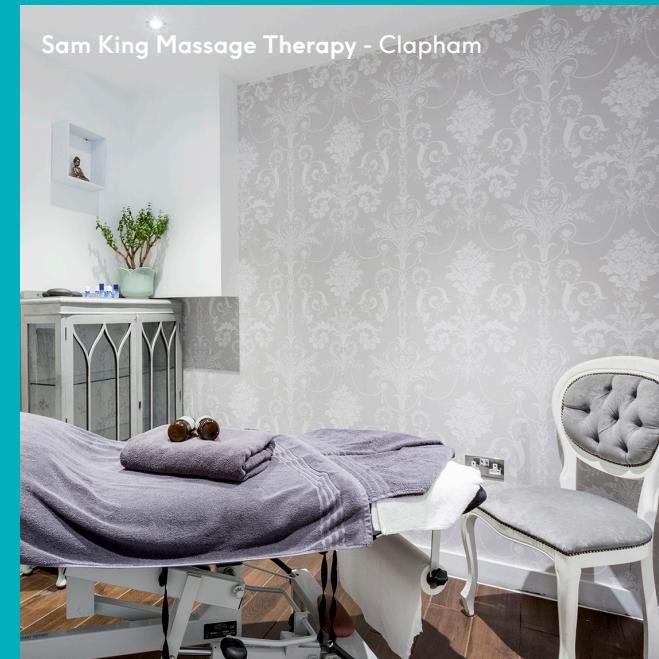
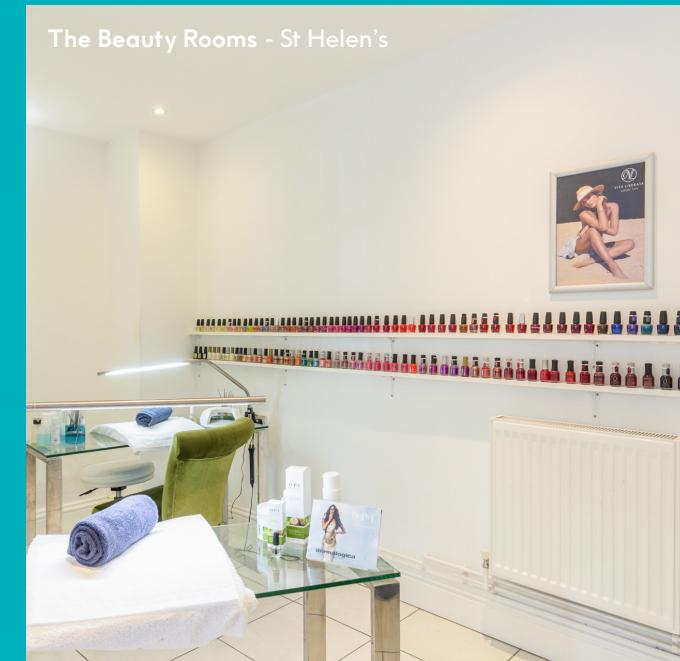
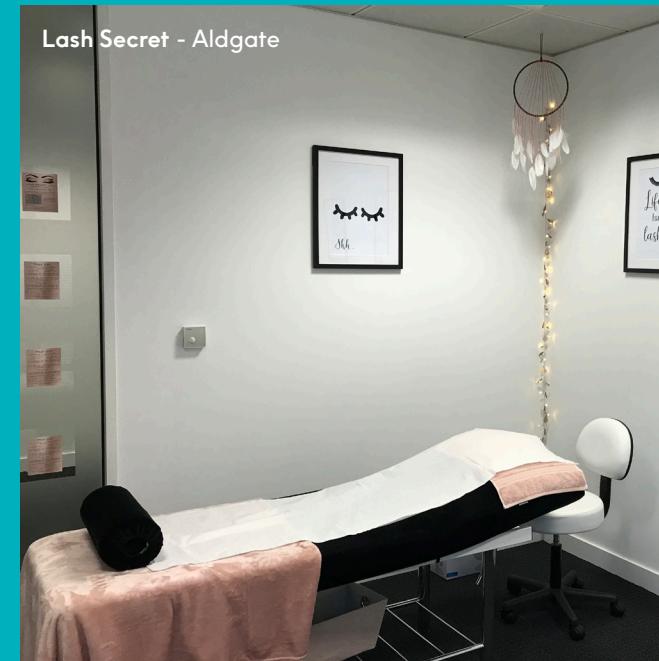
"Using Treatwell has allowed me to reach more clients than I could achieve on my own, with the help of my Account Managers & Treatwell's marketing. It allows me to spend more time working as a therapist while Treatwell manages my administration via a customised partner-site with an online booking feature. I have a busy practice from this."

## The Beauty Rooms - St Helen's

"Treatwell has been great for my business. The online booking system has made it more accessible for my customers to book at a time that suits them. With the advertising campaigns on social media I have gained many new clients who have already re-booked. I was sceptical at first and thought I would give it six months as a trial period but I will now stay with Treatwell as it has given me new business I would never have otherwise had! Their staff are very helpful also, I have never had a problem that can't be solved! Thank you Treatwell!"

## Kemp & Collins Hair & Beauty - Warrington

"Treatwell has been a fantastic addition to our salon, supplying efficient software and support when needed, new clients are arriving every week and our business is booming because of Treatwell."





## Treatwell and the British Beauty Council

We are very proud to be a founding partner of the newly formed British Beauty Council, an organisation that seeks to represent the voices, opinions and needs of the British beauty industry.

“We recognise the individuals running their businesses across the UK contribute a great deal to their local community, the beauty industry and ultimately our economy. We are proud to be a founding patron of the BBC so that we can help to represent these passionate and under represented individuals and further support in building on education, awareness and innovation.”

Lopo Champalimaud Founder & CEO Treatwell

“The British Beauty Council is a new and independent Not-for-profit industry body which exists to raise the profile of the beauty industry through three key pillars; Reputation, Education and Innovation. We are committed to developing excellence and growth in a sector that is a significant contributor to the British economy.”

Millie Kendall MBE

# Want to work with Treatwell?

Partners who come online with us grow their business by up to 44% in a year. Boost your reputation with verified reviews, increase customer loyalty and manage your salon on-the-go, anytime with our dedicated system, Treatwell Connect.

Visit [www.treatwell.co.uk/welcome](http://www.treatwell.co.uk/welcome) some more & arrange a free demo.

The numbers cited in The Treatwell Trend Report come from our database for the time period of August 2017 to February 2019, and represent YOY growth numbers. If you want more information, or just want to chat with us, please contact the Treatwell team.

# 47%

of all bookings are made outside of normal salon business hours

A booking is made through Treatwell every

# 1.5 seconds

Salons who partner with Treatwell can expect to see a growth in bookings of up to

# 44%

within their first year of joining.



The brighter way to  
grow a beauty business