



treatwell

The Beauty Report **2019**



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/01 Introduction



11 years ago,

Treatwell disrupted the hair & beauty industry with our online booking platform.

For salons, this meant a route to new clients (and no more paper diaries). For customers, this meant an easier way to book salon appointments on their terms.

Booking at 2am, booking last-minute, booking on the underground, rebooking and rescheduling – in just a few taps.

Now,

Treatwell lists over **20,000 salons and spas**, and takes bookings from around **25,000 customers** every single day.



01

We know what our customers want

and how to help our salon partners bring it to them, investing more in marketing than anyone else to promote the professional hair and beauty industry. These days, you'll spot Treatwell on tubes and buses all across Europe. We're on your television, in your inbox, hitting you with brilliantly useful content on where to go for the best wax. In short – we know our stuff, with the reporting and insight to back it up.



Spring/Summer 2019 campaign, Paris



Spring/Summer 2019 campaign, London



Autumn/Winter 2019 campaign, Amsterdam

A look back at 2019

reveals trending treatments, key cultural moments, and an apparent extinction of the name 'Gary' (more on that inside). With 11 months of juicy intel and a deep dive into our booking data, this is The Beauty Report 2019.

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Headline stories

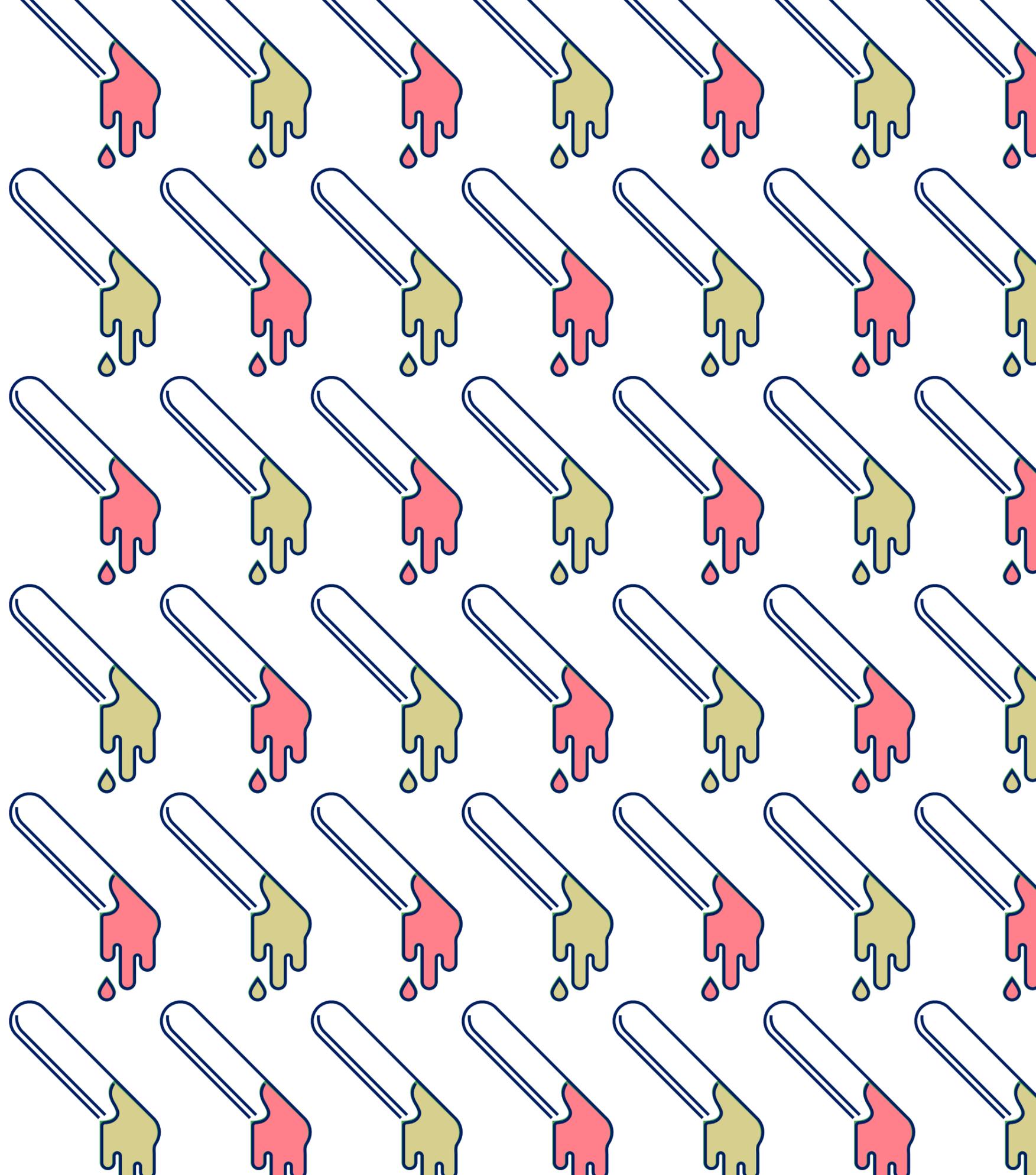


Wait, what?

The surprising stories that sum up how we booked this year.

**More people
got a wax in
London this year
than the number
of people living
in Newcastle.**

That's...



469,475

waxes in the south

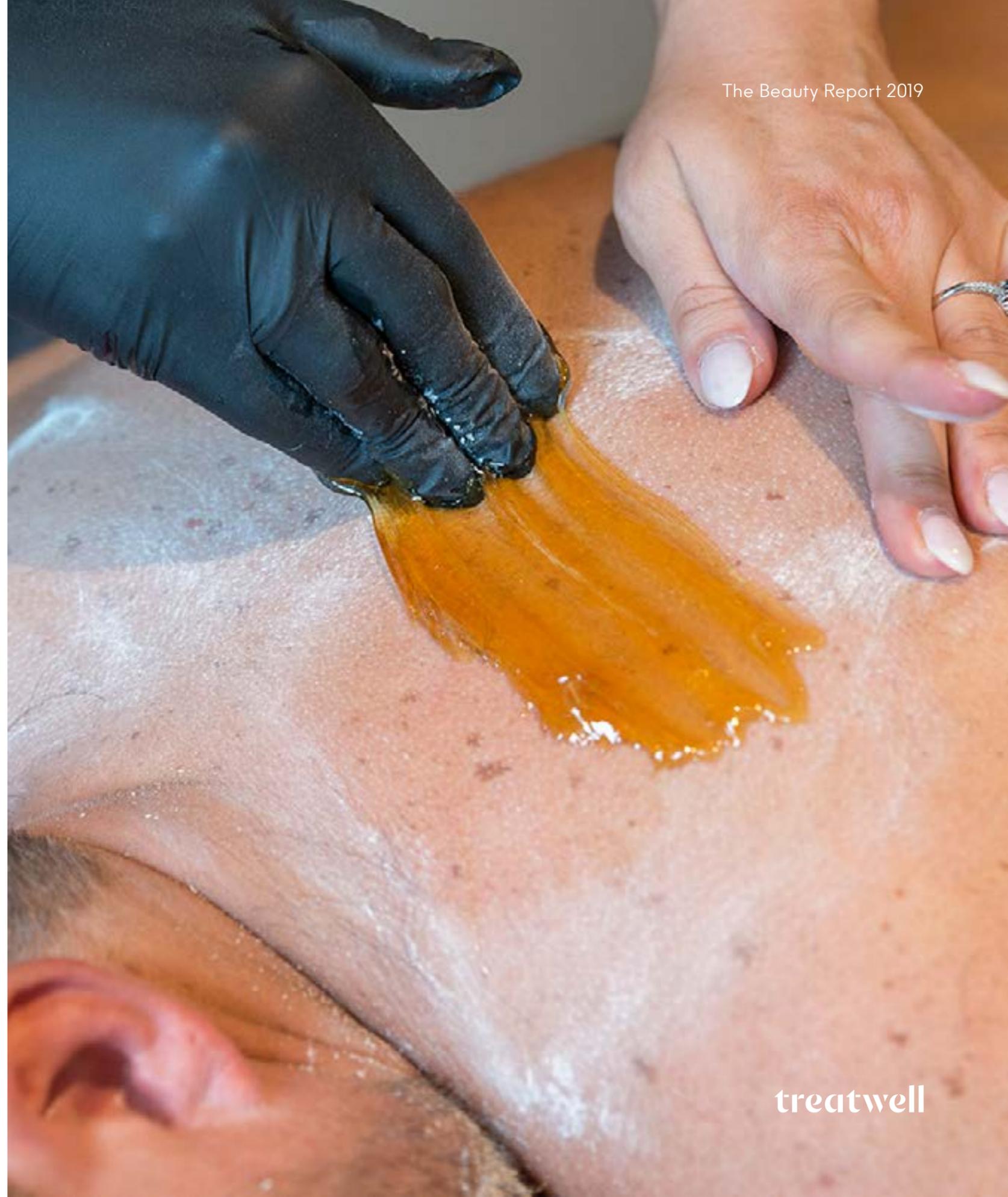
vs.

447,446

people living in the toon

More men are booking a back, sack and crack than are called Gary.

13,625 people booked a back, sack and crack appointment this year. That's more than the number of people called Gary, Ian, Donna and Karen.



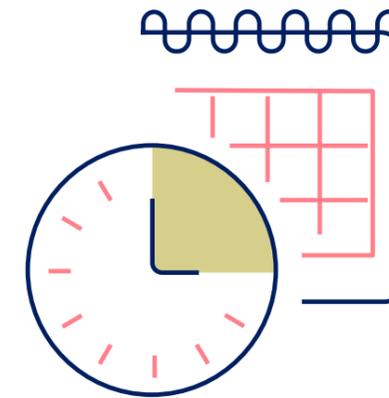
JOMO

(Joy of missing out)

Not going “out out” – more people head for a beauty treatment on a Friday night than any other night of the week.

Throughout 2019, there was an average of **88k bookings on Friday nights** compared to 55k on Monday nights.

JOMO is real, people.





2023

Year overview



Feb Jan Mar

For the Valentines (and Galentines).

It might sound cliché but Valentines Day always inspires a boost in certain treatment bookings...

Sugaring **+241%*** increase, Leg waxing **+332%*** increase, Hollywood waxing **+77%*** increase and our spa bookings were up **+103%*** (great gift choice, FYI).

*week on week increase

The month that sparked joy.

Marie Kondo's Netflix show arrived and seemed to trigger a 'clean out' in our beauty routine:

+18% YoY increase in facials, **+21%** YoY increase in deep tissue massage and **+22%** YoY increase in cryolipolysis.

Detox, much?

The Fleabag effect.

Two series, 28 awards and one hot priest: Fleabag was the it show of 2019. We're holding its eponymous lead, Phoebe Waller-Bridge, responsible for the rise in short cut hairstyles like the bob, lob, sob and wob.

Apr May June

Baby, incoming.

We saw an increase of **+34% YoY** in pre and post natal massage in the month that Prince Archie arrived. The treatment can help reduce tension and anxiety, increase circulation and ease back pain.

The hot one.

Remember what 30 degrees felt like? Easter's major heatwave saw an increase in hot weather treatments as we embraced the staycation – sandals and all.

Pedicures up **+10%***, Men's waxing up **+46%***, Body exfoliation up **+34%***.

*WoW

TV permanently "on"

The TV was permanently on this June, as one billion of us tuned in to watch England's success in the FIFA Women's World Cup.

The ad breaks saw a **+4.9%** increase in bookings, while the semi-final against Sweden held our attention throughout (traffic to the Treatwell site dropped by **-4.76%**).

Things got hot. Real hot.

25th July was the hottest day on record and it seems a cool-down at the salon was on the cards. Classic lash extension bookings were up by **+81%** MoM. Russian volume extensions up **+191%** MoM and sugaring was up **+18%** MoM.

And then there was Love Island. During its 6 weeks of air time, things got rather glamorous for Treatwell users:

- Eyelash extensions **+196%** increase
- Shellac manis **+25%** increase
- Pedicure **+48%** increase
- LVL lashes **+32%** increase
- Male waxing **+44%** increase
- Sugaring **+30%** increase
- Hair extensions **+32%** increase

It is what it is.

July August September

An ode to Tommy Shelby.

BBC's Peaky Blinders was back and with it came slick-back haircuts and Tom Hardy (unexpected, right?).

The new series aired in August, leading to a **+412%** MoM increase in searches for 'mens fade haircuts' and 'Peaky Blinders haircut'.

The time to spa.

National Spa Week kicked off in September, along with the launch of our Spa-tember campaign. Our concierge team planned hen dos, couple trips and self-care sessions throughout the month leading to a **+36%** MoM increase in bookings.

Let's talk climate.

Sir David Attenborough finally returned to our TV and strengthened our mission to encourage sustainability.

Searches for sustainable salons were on the rise along with 'vegan salons' and the all-vegan treatment, sugaring.

NOVCT

The month we became more mindful.

Mental Health Awareness month triggered the launch of our Mindful Mani campaign.

We reached over 20 million people across 8 countries in a bid to take back time at the salon and make it a moment for self-care.

The objective? Head to the salon, plug in to a podcast or playlist and chill out.

Bookings for manicures increased by **+11% MoM**.

104 Top treatments



What was hot (and not) this year?

Trend-followers try this stuff next.



Dermaplaning

The exfoliating skin treatment that also shifts facial hair - was on the rise this year, with a **+621%** YoY increase in bookings.





Tooth jewellery

is on the rise, with a **+971%** increase in 2019. This one got the office talking and, much like back in the 90s, tooth gems remain a real crowd-splitter.



If your quest for **'strong brows'** is yet to run smooth, give lamination a try.

The treatment that sets the brow hairs in place with two different solutions for a fluffy, 'just-brushed' look, has **increased in bookings by +465% YoY**.

When it comes to hair removal, we're still doing it (on our arms, legs and everywhere inbetween).

But, it's not just wax strips doing the job – we saw a **+91% increase in sugaring bookings this year**. The organic treatment uses three ingredients only – sugar, water and honey – for a smooth hair-removal session, every time.



04

And relax.

Just like everyone booking a 'relaxing massage' this year –

+40% more than last year, in fact.

The unexpected
treatments booked
frequently this year.

The jaw-droppers, if you like.

Things got seriously chilly for some Treatwell customers this year, with a **+41% YoY increase in Cryotherapy.**

“Which one is that?” we hear you ask – well, it’s a treatment that exposes the body to extreme cold in order to increase blood circulation, boost the immune system and reduce inflammation.



Another key treatment on the rise? **Piercing.** (yep, our salons offer it).

We saw a +40% YoY increase in bookings this year, growing with the high street trend for multiple piercings and heaps of gold jewellery.

It's a vibe.

The treatments dropping off the radar.

Some of the usual suspects losing their appeal.

Collagen treatments dropped by -16%.

Think non-surgical facelifts and rejuvenating facials.

Brows are still getting our attention, but no longer in high-definition.

We saw a -9% decrease in bookings of (the temporary treatment) HD brows.

The treatments declining...

(that we didn't predict).

Bookings for hair extensions were down by -14% YoY.

Maybe shorter hair prevailed this year. *Or maybe everyone saw our (substantial) coverage of the blunt cut bob and took the plunge. We think so.*

**Bookings for facial
massage decreased
-9% this year.**

We're blaming jade rollers and DIY-
beauty lovers.

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How we booked



Feeling nosy?

Here's a brief look at how we booked this year
(what we booked and when).

05

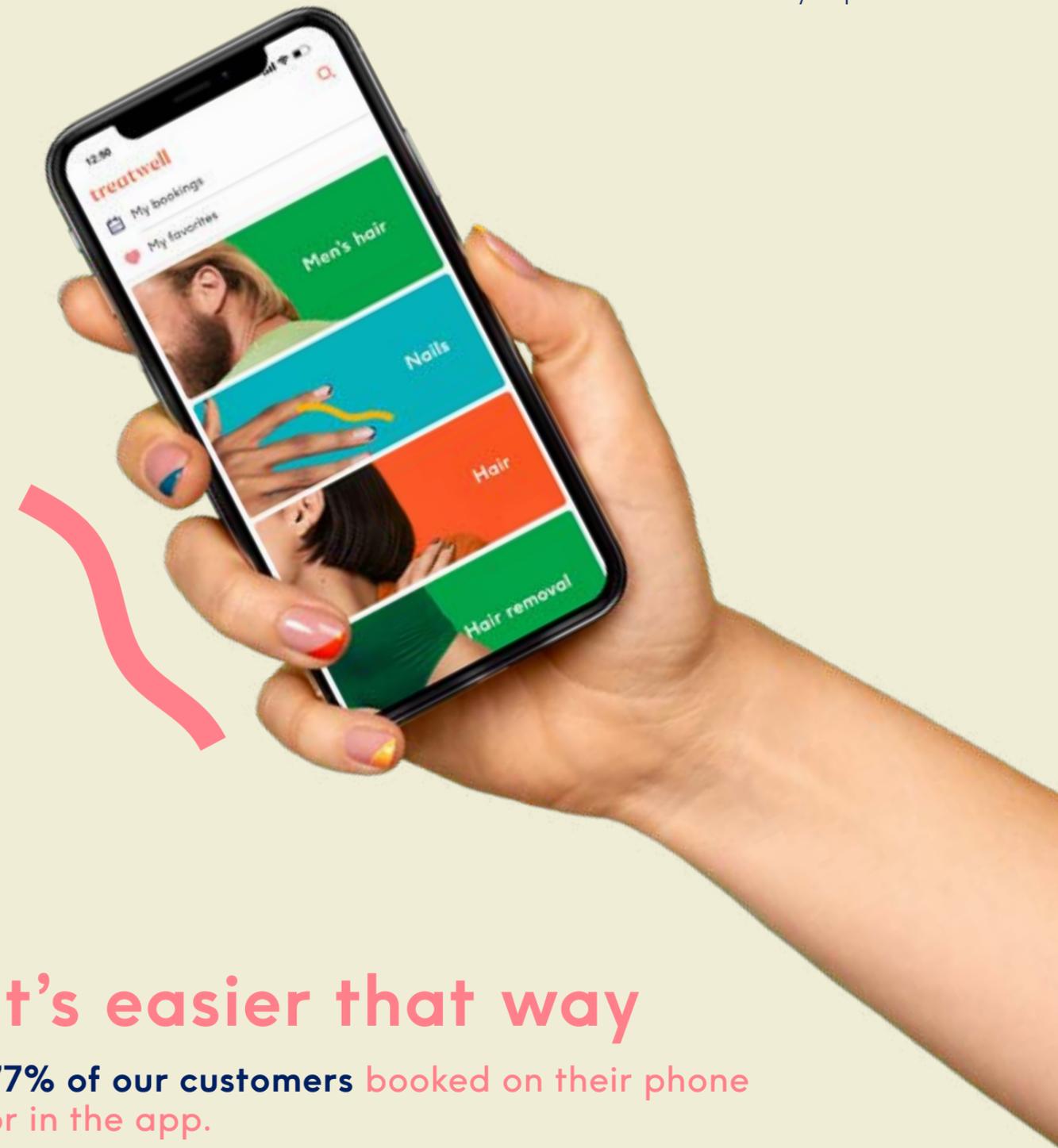
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Latest

Sorry, I have plans

Post-work treatments were popular with 6pm being our most-searched time slot.

/ How we booked

The Beauty Report 2019



It's easier that way

77% of our customers booked on their phone or in the app.

treatwell

How spontaneous

Our French market were the most 'last-minute' with **20% of treatments** booked 2 hours before the appointment time.



How very organised

Germany were more forward-thinking – only **9% of customers** booked 2 hours before.

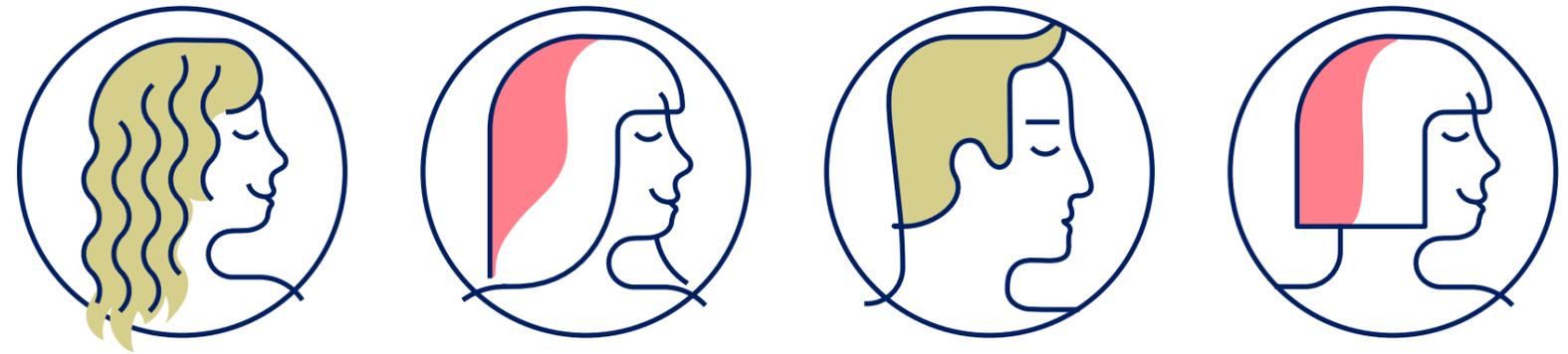
Hey, big spenders

“Treat yourself” was definitely the mantra for a handful of our customers this year.
So, what were they spending?

Team effort

Our top 10 customers made over 1,500 hair and beauty bookings between them.

That's...



£78,000*

*(How much our top 10 biggest spenders spent on treatments this year)

106 2020 trends

What's #trending?

Our army of beauty obsessives at Treatwell HQ predict the industry trends for 2020.



2020 Micro trends

Microbiome

(My-crow-bi-ohm)

Not to be confused with...
A coveted French pharmacy brand

Is: The colony of bacteria, fungi and parasites on the skin's surface. Or, an 'ecosystem of microorganisms', if we're getting technical.

We've all heard of 'friendly bacteria' and probiotics, but normally we're talking about gut health and yogurt drinks. In 2020, skincare is taking a turn for the bacterial. Searches for microbiome increased **+110%** YoY on Google, as we looked for ways to keep our skin's barrier healthy (and glowing, obviously).

Make-believe makeup

Spearheaded by HBO's Euphoria and its diehard Generation Z fan-base, the show's iconic looks have taken over social media, repping the "make-believe makeup" trend. It's not just Gen Z embracing all that glitters, brands including Fendi, Off-White and House of Holland brought it to the catwalks too.

The bejeweled look is reaching beyond make-up; bookings for piercings **+40%** YoY and tooth jewellery **+971%** YoY are showing huge growth Treatwell.

Extreme lashes

The 60s are swinging back around in 2020 with bold lashes leading the way. Bookings of lash extensions, as a category, were up by **+36%** YoY in 2019, but with Russian Lashes (the technique that adds up to 8 artificial lashes per natural lash) increasing in bookings by **+794%** YoY, we think this is the one to keep an eye on.



Big hair

Drama is not only reserved for lashes (or politics) in 2020 - spring's catwalks saw gravity-defying hairstyles from Christopher John Rogers, Marc Jacobs and Julien d'Ys. Salon time was up too, with bookings for hair-styling up-dos and permanent waves up +82% YoY and +52% YoY respectively.

AR filters

Earlier in 2019, Instagram opened up SparkAR to the public – that meant users could create their own AR-filters. Soon came the 'supermodel' and blurred-out effects, prompting Instagram's ban on filters that mimic plastic surgery.

We expect to see more experiential filters leading the way next year, like Beauty3000 (a Treatwell favourite).

2020 Macro trends

Sustainability

With scientists declaring a climate emergency, it's unsurprising that there's been a seismic shift in the collective consciousness and priorities of consumers.

Along with pressure on the beauty industry to drive change from a corporate level, we'll continue to adapt our at-home routines with DIY beauty products and a consideration of what we're throwing out (down the sinks and in the bin).

As searches for sustainable and **vegan salons continue to rise on Treatwell**, we predict our Partners will start to meet that demand.

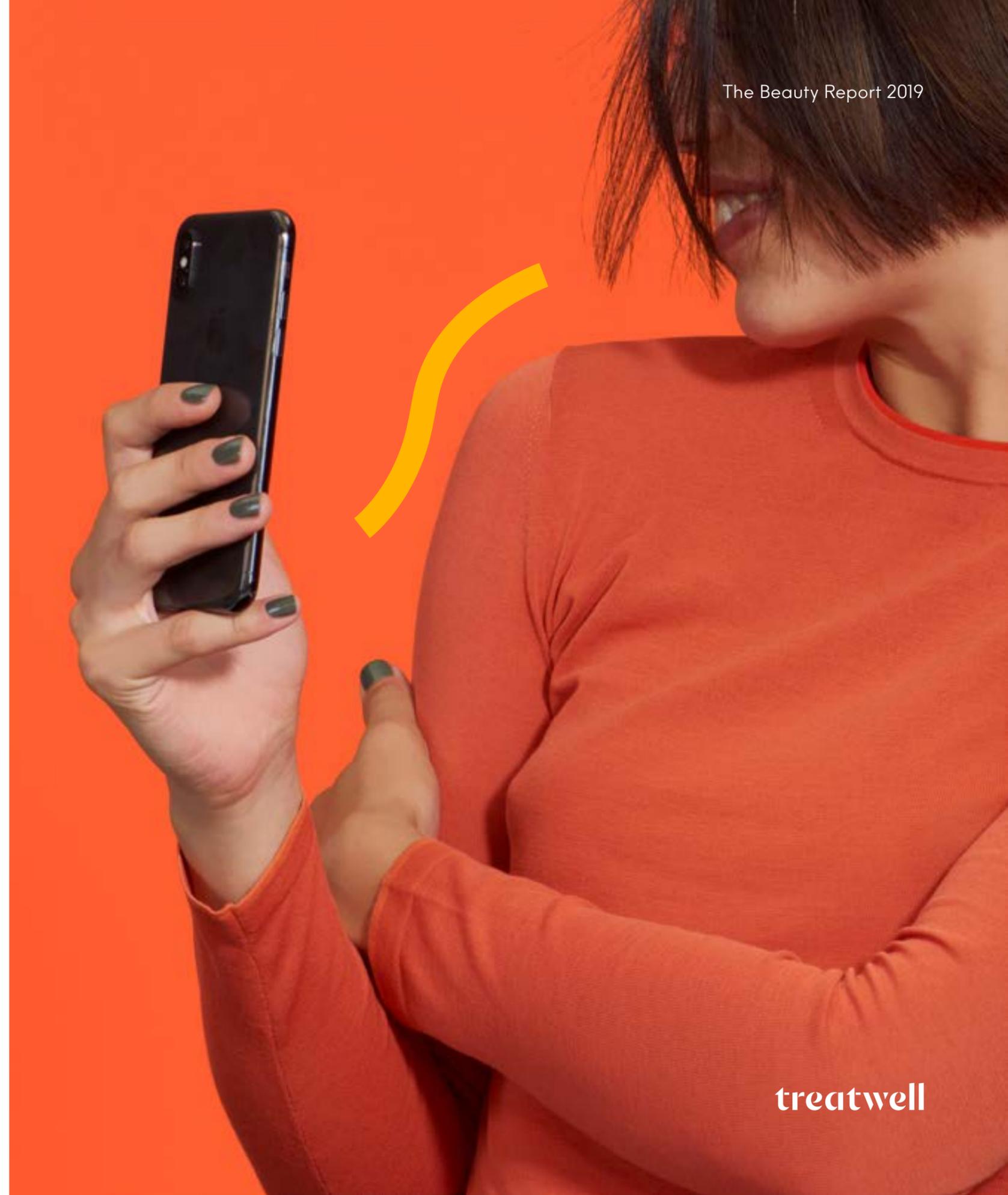


Digital self-care

A “digital detox” is the traditional method for finding zen in our every day, but it looks like we’ll be incorporating tech into our self-care routine in 2020.

With **+72%** of Gen Z noting stress and mental health as their most important health concern, and Google searches for the term ‘self-care’ rising by 100% in the last five years, we expect brands to start seizing this huge opportunity to help.

“Remote wellness” apps like fitness videos, meditation and digital therapists, allow self-care to travel with the consumer. Mindfulness on the move, if you like.

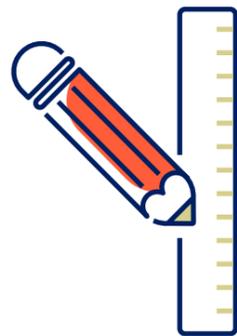


Forever trends



Tech

Beauty and tech are most definitely partners these days, with AR and AI common terms in the industry. From Dermologica's Breezometer, tracking pollution impact on the skin, to Neutrogena's custom built sheet mask – the industry is leading the way with innovation in 2020.



Personalisation

Think products that change with you – hair products tailored to the condition of your locks and customisable skincare recommended by salons. Consumers wish to be seen on an individual level, not as a demographic, with a beauty routine specific to age, skin type, hair type and the like bespoke beauty is most definitely the future.



Sleep

Since when is sleep a trend? Well, since we're not getting enough of it. Pinterest note a **+116%** YoY rise in searches for 'sleep optimisation' and believe luxury mattresses and pyjamas could be the goods to try. How does it affect our beauty routine? A bad night's sleep is no good for the brain or body. Without the right amount of restoration to the body's cells, the moisture levels in our skin become imbalanced. The change in pH balance will take its toll on your complexion (and dark circles), so we'll be striving for a full 8 hours in 2020.

Contact us

The numbers cited in **The Treatwell Report** come from our database for the time period of January 2018 to November 2019, and represent YoY growth numbers.

If you require any further information, or just want to chat with us, please contact the Treatwell press team.

Want to know more, or be kept up to date with the latest data?

Contact us.

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