

THE BEAUTY INDUSTRY

POST-PANDEMIC PROFESSIONAL EDUCATION



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RESEARCH OBJECTIVES

Since the onset of the pandemic, the professional beauty education landscape has seen profound changes. While groups have addressed these changes internally, no research has been available on how the industry has responded collectively.

Pivot Point aimed to understand the impact of these changes specifically focusing on:

- » Changes in the education expectations and behaviors of beauty professionals
- » Adaptation strategies of leading color brands in response to these changes
- » Insights that inform educators how to best meet the needs of their audiences to increase engagement with their content

This white paper is based on research conducted by Pivot Point among leading hair color companies (brands) and seeks to help the industry create successful educational programs and initiatives.

Pivot Point is available to present these research findings to your leadership team. Please contact Steve Reiss at sreiss@pivot-point.com for more information.



RESEARCH METHODOLOGY

Our research focused on the leading hair color companies: leaders in, and the largest providers of, professional (non-school) education.

These companies are highly sensitive to evolving market expectations, requirements and trends and are very purposeful in their activities. They are active participants in both in-person and online education and produce their own educational events while also participating in third-party activities.

Through Q2 2024, Pivot Point Research conducted in-depth interviews with education leaders (e.g., vice presidents, managers and directors) at 15 leading color brands.

After the results were aggregated, participants were given the opportunity to review and validate the findings and provide additional feedback and context.

Many of the findings affirmed widely held beliefs, but several insights surfaced that were either overlooked or counterintuitive.

While this white paper presents consensus findings, these do not apply to all the brands we consulted. A few outliers saw an opportunity to distinguish themselves by adopting educational strategies that deviate from the mainstream.



EXECUTIVE SUMMARY

This white paper highlights key changes in professional beauty education and emphasizes the need for companies and educators to adapt continuously to meet the evolving needs of beauty professionals.

Impact of the Pandemic on Brands

- » Brands quickly adopted online education during the pandemic, saving costs and changing their educational strategies.
- » The pandemic encouraged brands to adopt an “Activist Mindset,” leading to ongoing reassessments of budgets and educational activities.

Beauty Professionals’ Education Expectations

- » Online Education: Brands now lead with online education. Beauty professionals expect it to be high-quality, free and reflect current trends.
- » In-Person Education: There’s a renewed interest in live, in-person education, but participation is more selective. Professionals look for unique, valuable experiences, often preferring shorter, more focused and more intimate sessions.

Adapting to New Educational Formats

- » Brands are strategically blending different digital platforms and in-person education, understanding that each serves different needs.
- » The makeup of brand educational teams has changed, presenting new opportunities but also new challenges.

Generational Differences

- » The generational divide can’t be ignored. Different generations have different needs and expectations, meaning that a single approach won’t work for everyone.

Emerging Educational Topics

- » Brands are filling education gaps in areas including texture education, financial literacy and gray hair coverage.
- » Many offer certification programs to ensure comprehensive training.

Mannequins and Hair Tools

- » Demand for mannequins, specifically high-quality mannequins, has grown alongside the expansion of overall education.
- » Interest in mannequins with textured or gray hair has increased, reflecting the growing focus on these topics.

IMPACT ON BRANDS

As the pandemic began, brands were anxious to maintain close contact with their customers, especially as there was little visibility as to how the pandemic would play out.

The pandemic forced brands to adopt online education, in many cases, as quickly as possible and without appropriate vetting. While most brands had experience with some online platforms (social, YouTube, webinars, podcasts), few were either taking advantage of—or experts in—all of them.

For many brands, the pandemic resulted in significant savings as less in-person education led to reductions in staff, travel and event costs.

It also allowed them to break with traditional commitments (such as having a significant presence at major trade shows) without suggesting a lack of customer commitment (as everyone was impacted similarly) or a diminished position in the market.

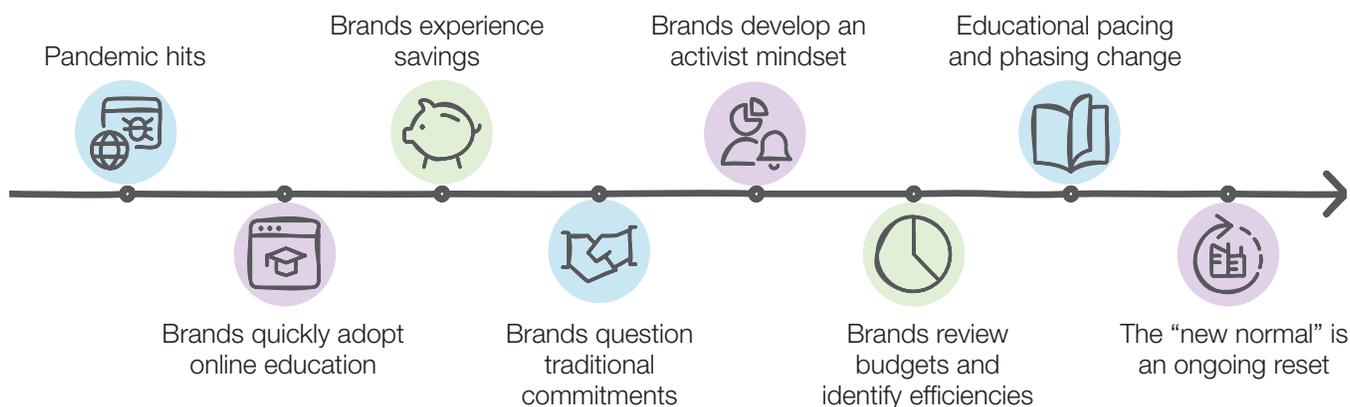
“The pandemic forced us to look at everything”

Brands currently have what one called “**an Activist Mindset**,” taking nothing for granted and reviewing all budgets to identify efficiencies. “Just because we’ve done this in the past,” they said, “there’s no guarantee we’ll do this moving ahead.”

The pandemic also changed educational pacing and phasing. Brands understand they are expected to move quickly and stay current with their content.

There is no “new normal,” or, more specifically, **the “new normal” is an ongoing reset**, with content, platforms, behaviors and expectations constantly changing.

Brands' Response to the Pandemic



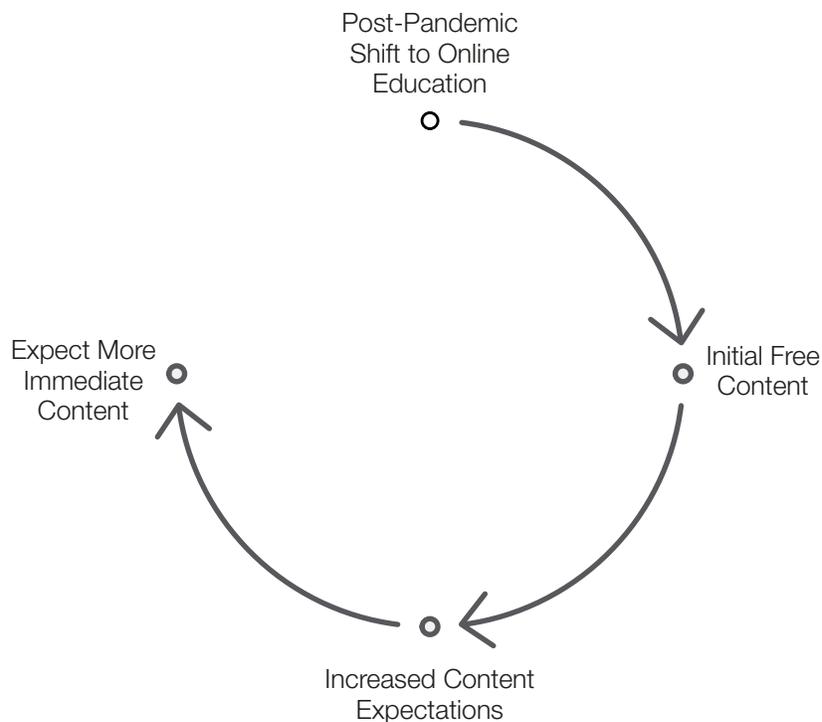
EDUCATIONAL EXPECTATIONS — ONLINE

Pre-pandemic, brands led with in-person education and used online education to fill in the gaps. Post-pandemic, **brands are leading with online education** and using in-person to fill in the gaps.

At the onset of the pandemic, brands rushed to engage their customers online. Less thought was given to pricing models, and much of the education was offered at no charge. Consequently, **beauty professionals expect that (most) online education should be free.**

As beauty professionals became more familiar with online education, their **expectations about online education standards changed**, demanding creativity, higher production quality, better execution and appropriate pacing to “earn” their attention.

Additionally, the widespread adoption of digital education has led **professionals to expect more immediate education delivery** on trending topics.



EDUCATIONAL EXPECTATIONS — IN-PERSON

There is a strong, **renewed demand for live, hands-on education**. However, beauty professionals have different expectations and behaviors compared to before the pandemic.

“People want to touch it and do it”

Beauty professionals have emerged from the pandemic as **more discerning in their time- and cost-related choices**. Similar to office employees who no longer want to work in the office every day, the travel “reset” has impacted how beauty professionals view their in-person event participation.

Professionals are generally less interested in traveling unless something special is offered—something that they cannot find (or experience) online. This was especially true for color education, where the consensus was that attending in person offered a much better learning experience. Professionals expect more value from in-person events including gift bags, big names and special discounts.

Beauty professionals are more protective of their time and don’t want to make the same commitments. They want to experience the three-day show in two days and the one-day show in half a day. These are general guidelines and don’t apply across the board—especially to events that offer exceptional education, entertainment or community.

Being used to on-demand online education, **beauty professionals want flexibility** in case “something better comes along” and often wait until the last minute to make live-event commitments. This has challenged many brands (and event producers) as they plan live events. Last-minute commitments also impact online events, but it is less of an issue as they are generally easier to scale at the last minute.

The term “intimate” was used several times to highlight what beauty professionals wanted from live, in-person events. But this intimacy didn’t only mean “smaller classes”—it meant **a more personal experience**—immersive, engaging, and offering a deeper connection with a community (such as their brand) or like-minded peers.

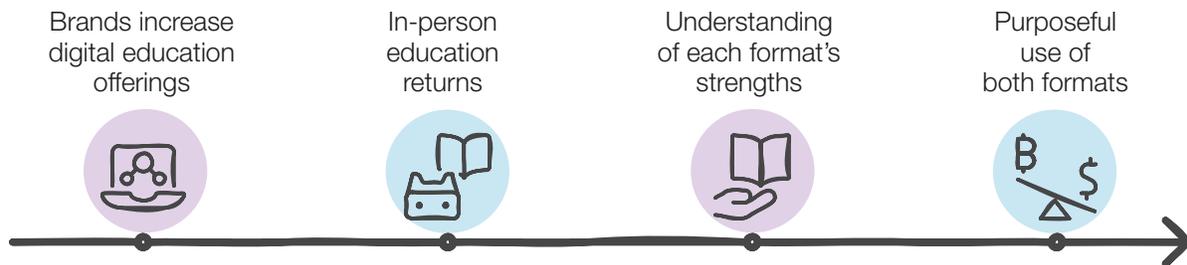


BRANDS AND THEIR EDUCATIONAL OFFERING

Since the pandemic, most **brands have significantly expanded their education offerings** by combining both in-person and online formats. During the rapid shift to online learning, brands quickly embraced a variety of digital platforms to ensure education remained accessible and flexible when face-to-face learning was not possible.

As in-person education has returned, brands have not reduced their online efforts. Instead, they've adopted a "blended" approach, providing a more comprehensive educational experience that leverages the unique strengths of both formats.

This shift has not only resulted in more total education but also in a more intentional and strategic use of each format. Brands are now more deliberate in selecting the optimal platform for different types of learning, ensuring that digital and in-person education work together to create a cohesive, well-rounded offering and experience.



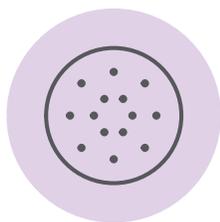
BRANDS AND ONLINE EDUCATION

Brands adopted online education quickly—and are now figuring out how to use each online platform more strategically. Relatedly, they recognize that their **online educators may need different skill sets** than many of their in-person educators. They also looked to hiring new educators to attract a larger (new or different) audience.

Brands are also more nuanced in their use of online education. Pre-pandemic, online education was generally either broadcast (marketed and available to everyone) or narrowcast (smaller online group meetings). Post-pandemic, there are many more variations.

Large webcasts can be even more inclusive, with technology now offering ubiquitous, real-time closed captions and post-event transcripts. Several mentions were made of hearing-impaired stylists (the industry estimate was that they represented 2% of the stylist population) who could now take advantage of their education. It was also suggested that captions were helpful for people not fluent in English. It was also suggested that closed captions should be included in all online education so they could be consumed in noisy environments (e.g., in coffee shops) and that Netflix has driven the increased use of captions.

With virtually everyone now familiar with Zoom, Teams or Google Meet, brands are offering a broader, more comprehensive range of **smaller, more focused online events** to more targeted audiences.



Targeted, Smaller Events

Reach specific audiences with focused content



Large, Inclusive Webcasts

Maximize reach with more accessible, widely broadcast content

ON-DEMAND VS. LIVE ONLINE

All brands offer on-demand online education. The consensus is that it works very well for “quick bites” (snackable information), which is especially valuable for younger stylists whose expectations have been set by social media (especially TikTok) and are used to controlling access to, and the pace of, the media they consume.

On-demand also works very well for look-and-learns, **allowing less experienced stylists to self-study**, revisit the content and manage their time.

It was mentioned that customer fatigue was a consideration, and expectations are that on-demand content be creative and engaging.

Some stylists (we’re told they are generally older) continue to resist; **they feel they were “forced” to use on-demand online education**, which they do NOT see as offering the same quality as live online education.

Virtually all brands now offer regular, scheduled live online education events. The consensus is that it be strategic and “special” in its use. It was emphasized that live streaming works best with a name (an Instagram- or TikTok-famous name). And there is an expectation of higher production value, no one wants a PowerPoint—they expect a demo, also taking into account shorter post-pandemic attention spans.



On-Demand

Accessible, quick bites, self-study, revisit content, manage time



Live Online

Strategic, special, higher production value, “name” presenters

BRANDS AND IN-PERSON EDUCATION

In response to a shift toward the regionalization of industry events and increased professional prioritization of their time, **the format of in-person educational events is evolving**. Events that once spanned three days are often now condensed to two, and full-day sessions are often streamlined into half-day workshops.

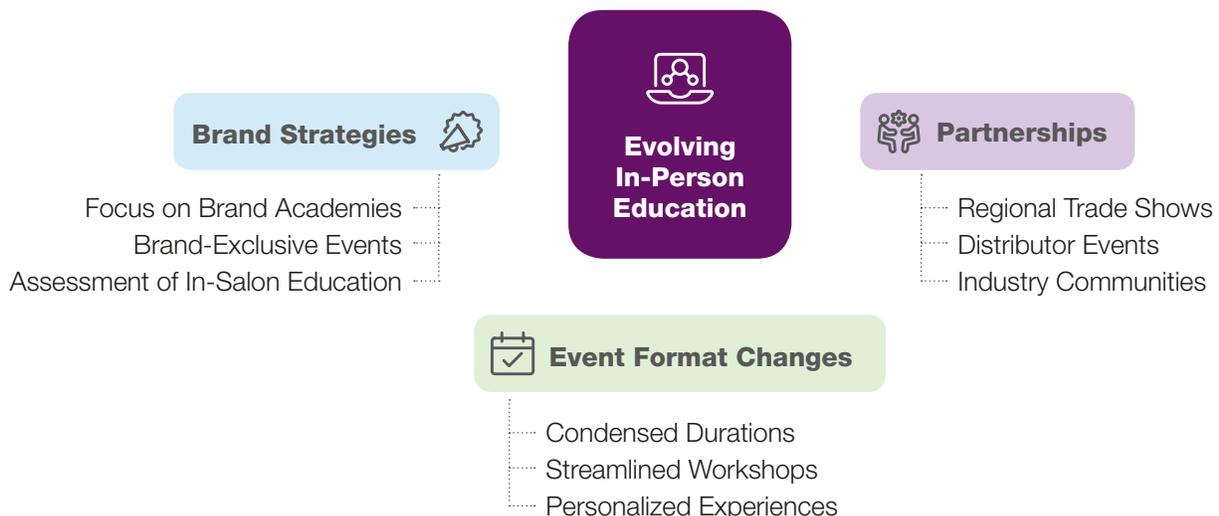
Despite a significant demand for in-person education, **brands are adopting a cautious and strategic approach** to offering these opportunities. There's a noticeable decline in interest in having a significant on-the-show-floor presence at large-scale industry events. Instead, there is a growing emphasis on supporting in-person education that fosters a sense of community and provides more intimate and exclusive learning experiences that can't be replicated online.

Aligning with the goal of cultivating loyal communities among beauty professionals, **many brands are shifting their focus toward their brand academies and their own exclusive events**. These academies and events offer a personalized touch that resonates more deeply with participants, enhancing brand loyalty and engagement.

Brands are carefully evaluating the logistics and ROI of in-salon education requests, especially regarding time and team costs. Requests are assessed to ensure the investment is justified and to explore potential efficiencies or alternative delivery methods.

To effectively reach local audiences, brands are partnering with third-party activities such as regional trade shows, distributor events and industry communities. These events require smaller teams and financial outlays but provide valuable in-market, regional touchpoints for brand interaction and education.

Overall, in-person education trend is toward more focused, personalized, and community-driven experiences that provide distinctive value beyond what online education can offer.



BRAND EDUCATION TEAMS

With salons closed and in-person education on hold, many brands either lost educators or reduced the size of their full-time educator teams during the pandemic. Emerging from the pandemic lockdown, **brand educator teams are looking different.**

Since the pandemic, educator teams are generally larger, reflecting a mix of fewer **full-time educators and more “category-exclusive” contract educators.** While pre-pandemic educators were somewhat uniform in their skill sets, post-pandemic contract educators were often chosen for a variety of reasons—including local market presence, specific category expertise, online presentation skills and influencer followings. Additionally, while these contract educators are category-exclusive to the brand, brands only have a percentage of their attention, as many work with other brands in non-competitive categories (e.g., hair extensions).

The challenge is that brands are finding both **less educator consistency and lower educator engagement with this new model.** While full-time educators were easier to get together for internal meetings or training events, bringing together the post-pandemic team can be more difficult. They often have conflicts with their other responsibilities and may be reluctant to attend training events when only some of their costs are being covered.

There is a **strong brand focus on train-the-trainer activities,** many of which are conducted online, and issues related to driving team building, accountability and deep product knowledge.

Brands are also addressing the role of their educator-influencers. While brands leverage them to attract attention and often integrate them into broader marketing programs, they also look to transition prospects and customers from influencers to their own educators for higher-quality instruction.

“They help at the front end but can hurt at the back end”

Some backlash is coming from the brands’ more traditional educators, who question the educational value of influencers. They note that while influencers are effective at attracting initial interest, many have a much lower level of product and technical knowledge, which may undermine the long-term education process.



EDUCATION AND THE GENERATIONS

In beauty, the diversity of generational perspectives is both a challenge and an opportunity. The consensus is clear: to engage all generations effectively, we must understand each generation's unique preferences and expectations. This understanding is crucial in tailoring our approaches to meet their needs.

“We are an industry of generations”

While it was emphasized in the research that every professional needs to be treated as an individual, there were some generalizations that were consistently heard.

Older stylists often feel that they were “forced” into digital adoption and tend to be more reluctant to adopt digital methods. They show a clear preference for in-person interactions and are most comfortable with group learning styles. Relatedly, they often perceive online education as lower in quality compared to traditional in-person methods. For them, attendance at events and sessions is primarily driven by the topic rather than the presenter.

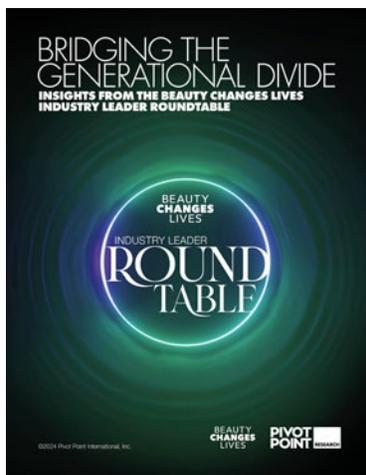
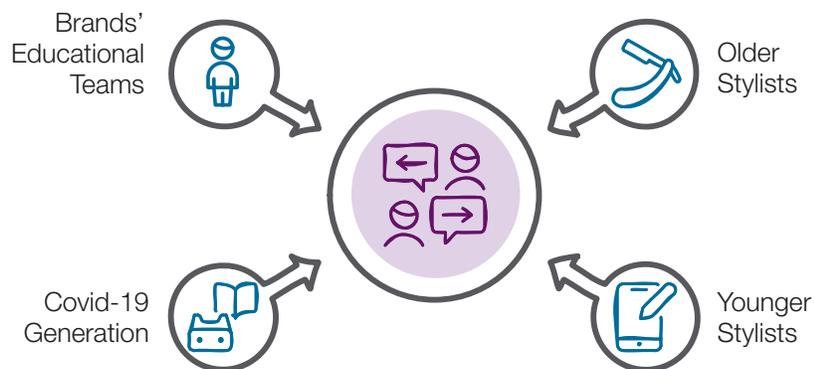
While **younger stylists** appreciate in-person interactions, they are most comfortable online platforms and working independently versus working as part of a group. They have a shorter attention span for both online and in-person sessions and expect in-person experiences to mimic the interactivity and immediacy of digital environments. For this group, the presence of engaging presenters, especially influencers, is a significant draw.

The **COVID-19 generation** was uniquely impacted by significant educational disruption during their beauty school years. Many had less in-person training for both technical and soft skills than past generations. With the move in many states to reduced hours and a focus on test-relevant material (often at the expense of trending topics), their educational experience was “incomplete.” In response, some brands have stepped in to fill these gaps, by providing necessary training to support both basic and more advanced skills.

EDUCATION AND THE GENERATIONS

Brands were clear that to resonate with diverse audiences, it is essential to **have educators that each generation** can identify with. This means incorporating a mix of older and younger presenters and traditional educators and influencers.

Contrasted to pre-pandemic practices, many brands are now having **different generations of educators present together**. They are finding that, in spite of the increased “cost,” this approach has been highly effective. To use a sports analogy, one presenter can provide the “play-by-play,” while the other presenter can provide the “color commentary.”



ADDITIONAL RESEARCH ON GENERATIONS

Pivot Point's “[Bridging the Generational Divide](#)” white paper highlights important beauty-industry-specific insights from the *Beauty Changes Lives* Industry Leader Roundtable

TRENDING TOPICS

Brands identified several topics within which, to fill the gaps, they have stepped up their educational activities and focus.

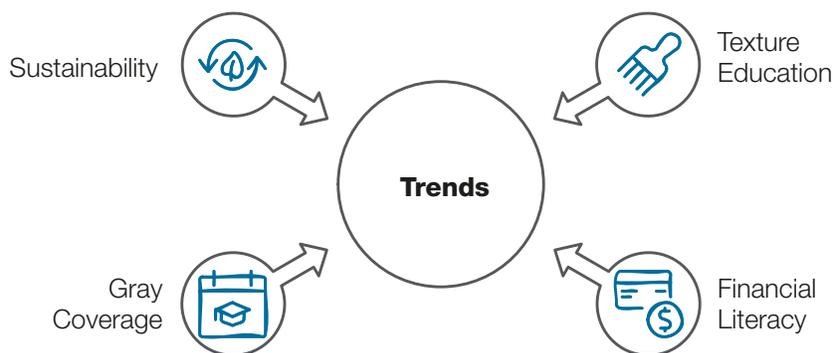
Driven by the move to “natural hair” during the pandemic, the evolving diversity, equity and inclusion conversation and related legislative initiatives (supported by the Professional Beauty Association’s [Texture Education Collective](#)) **brand approach to texture education has undergone a significant transformation.** Texture is no longer treated as an “add-on,” as a standalone class or as a separate topic, and brands now integrate multiple textures within a single class. Additionally, many brands have dedicated “texture director” roles, while others have brought on texture partners to provide expertise and credibility.

Financial literacy has emerged as a critical area of focus, as brands recognize that financially successful professionals make good customers. Many brands are offering programs to help educate and support industry professionals and see this as a core skill set to support.

Brands recognize gray coverage as a growing category/trending topic where many professionals (especially younger professionals) would benefit from additional training.

To address these and other key topics, **brands are increasingly offering certification programs.** For industry professionals, these programs serve as a validation of skills and (often) a competitive point of differentiation. For brands, certification programs are a way to ensure that an entire education module (multiple classes) is consumed and that the professional can meet a certain standard. It’s also seen as a competitive differentiator and a way to build and support their “brand community.”

Brands recognize that sustainability is important to their team, their professional customers and consumers. However, their focus on—and activities related to—sustainability vary. Some brands have prioritized sustainability, which drives their business practices and product development. For others, it is acknowledged but not fully integrated into their activities or communications. It was suggested that some of these brands—which may indeed be involved in sustainability activities—might not want to be directly compared to some of their more active competitors.



MANNEQUINS AND HAIR TOOLS

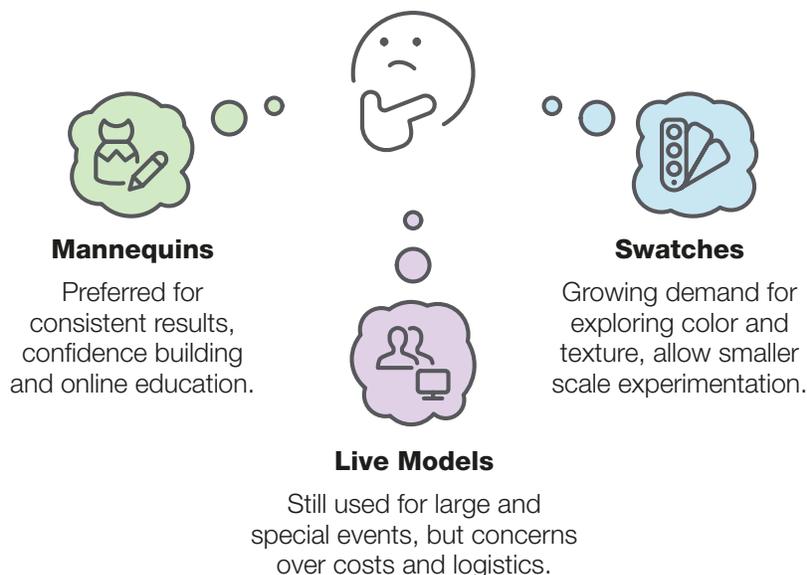
As the amount and availability of overall brand education grow, the use of hair tools, specifically mannequins and swatches, has grown as well.

Mannequins are the preferred tool for demonstrating techniques and conducting in-salon education. The demand for high-quality mannequins stems from the need for consistent and predictable results, especially related to color education. Mannequins are also crucial for teaching less-experienced stylists to develop confidence and work at their own pace—particularly in online education environments.

Demand for mannequins is closely tied to the curriculum being taught, and there is increased demand for mannequins for texture and gray coverage. Post-pandemic, there has been a marked shift in professional preference, with individuals favoring their own personal mannequins over shared ones.

Swatches are seeing a growing demand, particularly longer ones and those representing gray hair. These tools are increasingly used in conjunction with mannequins during classes to explore a wider range of color and texture applications and provide an opportunity to experiment and observe outcomes on a smaller scale before applying them to full mannequins or live models.

Live models are still used, primarily at large-scale live events or those featuring a “stage show” element. The use of models in education is a mixed and debated topic, especially as the industry shifts towards smaller, more intimate events. Concerns over costs, waivers, permissions, model reliability and personality conflicts—non-existent with mannequins—are significant considerations.



ABOUT PIVOT POINT



[Pivot Point](#) International is a third-generation family business dedicated exclusively to the professional beauty industry. Our team includes over 30 professionals with industry-specific licenses and we have extensive experience with beauty schools, salons, spas, barbershops, chains, brands and distributors.

Pivot Point offers original and third-party cosmetology, barbering, nails and esthetics education and content through a learning platform designed specifically for beauty professionals.

Pivot Point manufactures the industry's most diverse range of high-quality mannequins, all produced in our company-owned [SA 8000-certified](#) factory to meet stringent ethical and production standards. This includes a full range of [texture mannequins](#) and our versatile and eco-friendly [CAP SERIES](#) mannequins—designed for increased portability, reduced storage space, and minimized landfill waste—and offering customizable hair and skin tone options.

Pivot Point is committed to supporting the industry and its professionals through charitable, cause-driven and educational activities and recognition programs, and has a strong focus on [ethical manufacturing](#), [diversity and inclusion](#) and [sustainability](#).

We are a proud founding member of [Beauty Changes Lives](#), and collaborate on the Honor Your Teacher recognition program, the Intercoiffure Student Contest and the Leo Passage Educator of the Year award.

ABOUT PIVOT POINT RESEARCH

We understand industry relationships and trends, ensuring your research objectives are met with actionable, real-world insights.

Whether your research is for internal intelligence or to support sales and marketing, we can help you explore all your research options. Knowing that quick turnaround is often a consideration, our industry relationships and experience help us provide you with the most time-effective solution.

We look forward to working with you!

INQUIRY FORM

pivot-point.com/research/

The Pivot Point Research Leadership Team



Steve Reiss
Strategic Marketing & Business Insights

15+ years providing custom research solutions to leading beauty industry groups, with a focus on leveraging research insights to create effective strategies supporting business goals.



Sabrina Cason
Primary Research

Specializes in consumer-focused market research, leading and designing research methodology, execution and analysis that provides insight to drive business growth.



Vasiliki A. Stavrakis
Secondary Research

Specializes in analyzing and aggregating third-party and government data and regulatory, licensing and accrediting agency requirements to inform business decisions.



Christina Mooshil
Data Visualization

Specializes in combining analysis, design and storytelling to create visual data representations that help people understand and evaluate information more easily.