

DATA, COLLABORATION AND THE FUTURE OF THE PROFESSIONAL BEAUTY INDUSTRY

INSIGHTS FROM THE BEAUTY CHANGES LIVES
DATA ROUNDTABLE AT THE PROFESSIONAL BEAUTY
ASSOCIATION EXECUTIVE SUMMIT



BEAUTY
CHANGES
LIVES

INDUSTRY LEADER
ROUNDTABLE

3.5 MID-YEAR FORUM

BEAUTY
CHANGES
LIVES

PBA EXECUTIVE
SUMMIT

PIVOT
POINT RESEARCH

©2025 Pivot Point International, Inc.

TABLE OF CONTENTS

About the Roundtable	1
Our Topic – Data and Collaboration	2
Roundtable Participants	3
Key Insights – Summary	4
Moderator Perspective: Edwin Neill	5
Table Discussions:	
Table One - Data Categories	7
Table Two - Definitions	9
Table Three - Data Validation Considerations	12
Table Four - Accessible Data Sources	15
Table Five - Inaccessible or Restricted Sources	17
Table Six - Gaps & Missing Data	20
Table Seven - Recruitment & Retention	24
Table Eight - Business Performance	27
Table Nine - Legislative, Reputation & Advocacy	31
Table Ten - Data Use Restrictions	34
Table Eleven - A Consistent Industry Data Story	37
Participant Feedback	
Research	40
Verbatim Comments	41
Verbatim Feedback on the Roundtable	43
Photo Gallery	44
About Beauty Changes Lives	46
About the Professional Beauty Association	47
About Unite As One	48
About Pivot Point International	49
About Pivot Point International Research	50

The **Beauty Changes Lives Industry Leader Roundtable** is an annual gathering of top leaders, educators and innovators from across the professional beauty, barbering and wellness ecosystem. Held on the same day as the annual Beauty Changes Lives GALA, the Roundtable serves as a platform for cross-sector collaboration, candid discussion and actionable insights on the most pressing challenges and opportunities facing our industry.

Each year, the Roundtable focuses on a central theme:

- In 2023, we tackled recruitment and retention
- [In 2024, we explored the generational divide](#)
- [In 2025, we turned our attention to the evolving role of technology](#)

At the 2025 roundtable, the need for a deeper examination of how our industry utilizes data was identified.

In collaboration with the Professional Beauty Association, Beauty Changes Lives created a special session of our roundtable series (version 3.5) at the PBA Executive Summit to bring together leaders from across the professional beauty ecosystem and address the data challenge.

The Roundtable conducted a deep dive into what data exists, how it's used and where our key challenges and gaps lie—with the goal of creating actionable insights and related follow-up that help our industry use data more effectively to drive both individual and collective growth.

Participants were welcomed to the Roundtable by Leslie Perry, CEO of the Professional Beauty Association and Lynelle Lynch, President and Founding Member of Beauty Changes Lives.



The roundtable participants were divided into tables related to four key themes, each with its own subtopics. Each theme has a subject matter expert designated facilitator to support the roundtable conversation.

Data Framework – Facilitated by Paul Tate, LinkUp Marketing

Table 1 - Data Categories

Table 2 - Definitions

Table 3 - Data Validation Considerations

Data Sources – Facilitated by Leslie Roste, FBIC

Table 4 - Accessible Data Sources

Table 5 - Inaccessible or Restricted Sources

Table 6 - Gaps & Missing Data

Data Use Cases – Facilitated by Mike Alexander, Borboleta

Table 7 - Recruitment & Retention

Table 8 - Business Performance

Table 9 - Legislative, Reputation & Advocacy

Table 10 - Data Use Restrictions

A Consistent Industry Data Story – Facilitated by Jayne Morehouse, Beauty Industry Report

Table 11 - The Role of Associations and the Media



PROGRAM TEAM**Moderator**

Edwin Neill – President & CEO, Neill Corporation; Board Member, Beauty Changes Lives

Executive presenters

Leslie Perry – CEO, Professional Beauty Association

Lynelle Lynch – President, Bellus Academy; President & Founding Member,
Beauty Changes Lives

Lisa Roeberg – Executive Director, Beauty Changes Lives

Topic Facilitators

Paul Tate – COO, LinkUp Marketing

Leslie Roste – Vice President, Government Affairs, FBIC

Mike Alexander – CEO, Borboleta Beauty

Jayne Morehouse – CEO, The Beauty Industry Report

Program Producers

Meghan Hayden – Communications Director, Beauty Changes Lives

Steve Reiss – Executive Director, Industry Relations and Insights, Pivot Point International

Participants

Leaders representing all segments of the industry



The **Beauty Changes Lives Data Roundtable** at the PBA Executive Summit brought together leaders from schools, brands, manufacturers, software companies, associations and media to address one of the industry’s most significant barriers to progress: the lack of consistent, reliable and unified data.

Key takeaways included:

1. No Shared Data Foundation

The industry uses different definitions, coding and terminology, making datasets impossible to compare.

“We’re all going to have different definitions.”

2. We Don’t Know the Basic Numbers

Even foundational metrics—such as the number of salons, active pros or independents—are unclear.

“We don’t have a true understanding of just what the market is.”

3. Major Segments Are Missing

Independents, suites, the Vietnamese nail sector, cultural hair categories and the gray market remain largely uncounted.

“A blinding flash of the obvious... the consumer category isn’t here.”

4. Data Is Fragmented and Contradictory

Different datasets conflict and lack segmentation.

“Any data considered respectable... lacks segmentation.”

5. Weak Data Undermines Advocacy

Inconsistent or inaccessible data makes it harder to respond to legislative and regulatory threats.

“We are slammed with legislation—and we don’t have the data to fight with.”

6. The Industry Must Control Its Narrative

Related to recruitment and retention, external groups shape the story of professional beauty with incomplete data; the industry needs a unified, data-backed message.

“Other people have always claimed the narrative for us.”

7. Strong Alignment and Willingness to Collaborate

Despite fragmentation, participants expressed enthusiasm and readiness to work together.

“We are more aligned than we realized.”

On-site research of the Roundtable participants confirmed their overwhelming alignment on the critical nature of the topic and prioritization of the following steps:

- 86% of participants said collaboration around data is “extremely important.”
- Standardizing data/definitions and creating a unified industry narrative were listed as the top immediate priorities by more than half of the attendees.

The roundtable marked the first time the industry had gathered cross-functionally to map what was missing, what was possible and the steps required to build a shared data future. It was agreed that much of the information and insights needed resided in the room.

As a follow-up, a dedicated industry task force is being created to set priorities, develop a roadmap and provide a mechanism to address the key challenges and opportunities that the group has identified.

A Perspective on Data

Edwin grounded the roundtable in industry history, describing how beauty leaders such as his father championed business education and data at a time when “people didn’t think you need to train salon owners on business.”

To build that foundation, they invited quality management pioneer Edward Deming to help shape their training. Deming’s philosophy set the tone: “In God we trust; all others bring data.”

Edwin underscored Deming’s belief that “it was the processes and the systems that needed to be worked on, and to work on processes and systems, we have to have good data.”

Importance of Data Definitions

The introduction emphasized the need for shared language and metrics across the industry. One of Edwin’s mentors, John Corby, was cited for his work on the Uniform System for Financial Reporting for Salons and Spas, highlighting how different salons were interpreting numbers differently.

“To really understand how a salon or spa works, you have to take into account service provider compensation... service revenue versus service pay.”

This previewed the day’s central theme: the industry needs uniform and consistent definitions to understand its own data.



Different Segments of the Industry See Data Differently

Edwin walked through how data affects every role and business model, but noted that, depending on our role, we all focus on different types of data.

- Manufacturers need data on market size, the number of professionals and market share.
- Schools focus on enrollment, placement, curriculum, policy, licensing and accreditation.
- Salons and spas depend on revenue trends and ticket data.
- Tech companies rely on metrics like adoption and use.

This framed the day’s goal: a deeper, shared look at “what exists, how it’s used, where the gaps are and what we can agree on as priorities.”

Existing Collaborative Models

Edwin highlighted current examples of successful industry collaboration as encouraging signs of what coordinated industry data efforts might achieve.

- The KIM Report: “An incredible resource providing monthly industry performance dashboards.”
- Unite As One: “Associations getting together to agree on shared priorities... that has never existed in the industry before.”



Following are notes taken from the recording of the individual table discussions.

While there was a fair amount of overlap between the tables, we've kept each table's comments intact to reflect the scope of their discussion and how key themes were reinforced across the different groups.

TABLE ONE - DATA CATEGORIES

1. Accessible Consumer Data

A participant stressed that a critical data category was missing from the industry's framework: the consumer. They described this blind spot.

They emphasized the essential question every company must answer: "Who do you need to help win in order for your company to win?"

The group noted that many in the industry currently lack meaningful insight into "consumer buying behavior and the way that this next generation is spending money."

They also encouraged more collaboration among POS companies, saying it would be beneficial to "see you play together and provide more industry data that could support the entire industry."

2. Standardizing Definitions and Coding

While the table's assigned topic was data categories, the conversation extended into definitions. One participant underscored the importance of unified language:

"We talked about clearly defining and standardizing our definitions to support the data being produced."

Their recommendations included:

- Ensuring "industry representation across the board."
- Introducing standardized coding systems "based on your service, based on the tools that you're using."
- Beginning standardization early in education:
- "Start this at the cosmetology training level and work it up the industry."
- Including textbooks, since "they're the ones who start with it."



3. Data Validation & Normalization

The group outlined why structural consistency matters via syntax questions and format inconsistencies like date ordering:

“If one database is European and one is American, you’ve got problems.”

One participant highlighted the need for shared standards:

“In other industries I’ve worked with, competitors meet and decide how we should do this. That doesn’t exist yet in this space.”

4. Need for Leadership and Unified Direction

The table discussion closed with a recognition of the broader challenge:

“We’ve got a lot more conversation to have to agree on anything we’re talking about with data.”

Key open questions emerged:

- “Who should lead that?”
- “Who should be on these topics?”
- “What’s the objective and the outcome for the industry?”

The speaker described current efforts, such as the KIM Report working with POS companies but acknowledged:

“It’s a long journey and we need lots of support and collaboration from the people in this room.”



TABLE TWO - DEFINITIONS

1. The Need for a Cross-Industry Standards Group

The group emphasized that definitions vary widely across brands, software systems, schools and service categories. One participant summarized the core issue:

“We’re all going to have different definitions today.”

They agreed the industry needs “a collective group to help create the definitions—big, small, middle—because we all define everything different today.” This group should include manufacturers, schools, software companies, educators and textbook authors.

2. Conflicting Data Shows Why Definitions Matter

Multiple examples illustrated the chaos caused by inconsistent definitions. One speaker described researching haircut frequency:

“It literally went from the client report at 11 to the labor board at six times per year.”

This discrepancy raised key questions:

“How are they defining that data? Where are they pulling it from?”

It was mentioned that differences in salon size, regionalization, service mix in software systems all drive conflicting numbers.

3. Categories vs. Definitions: How They Differ

Participants clarified the relationship between categories and definitions:

“Category is licensing, revenue, sales—the big raw categories. Definitions are what’s beneath that... how do we make sure we’re talking about the same thing?”

For example, “frequency of visit” can mean very different things depending on the service and the software reporting it.



4. Complexity in Service Terminology

The group spent a significant amount of time discussing how different services blur traditional definitions. Examples included:

- Nails:
“You keep coming back because you’re getting a fill, not a full set... how do you define that visit?”
- Men’s grooming:
“Beard trims versus shaves... if someone is just blocking you as a visit, it would be nice to know what that visit encompasses.”
- Cultural styling:
“Protective styles have longer cycles... we’re losing a lot of data there because we don’t capture cultural categorization.”

The group agreed that definitions must reflect real, diverse service practices.

5. Service Coding: A Path Toward Standardization

A suggestion was assigning numerical service codes, similar to the IRS:

“Taxes are defined as standard definitions... why can’t we create standardized definitions?”

Several speakers supported coding based on what tools or products are used:

“If it involves color, it’s a color service. If it involves shears or clippers, it’s a cutting service.”

This approach could streamline everything from salon data to brand analytics:

“Brands always ask: how much of my product is used in back bar versus retail?”

6. Start in Beauty Schools & Align the Textbooks

A repeated theme was building definitions at the education level:

“It really all starts at beauty school... what do we call it when we go to school?”

This requires bringing textbook publishers into the process:

“Take the textbooks and align them with those definitions so everybody from point A has the same understanding.”

Concerns were also raised about whether textbooks uniformly include cultural tools and techniques.

7. Importance of Avoiding Interpretation Drift

Participants noted that internal systems may keep their own definitions, but shared definitions are essential for comparing and aggregating data:

“When you’re sharing data back, it’s defined as X... even if internally you define it differently.”

Without this, the industry ends up with huge gaps and mismatched metrics.

8. Understanding Current Practices Before Changing Them

One participant noted the need to map existing definitions before rewriting them:

“Before you try to improve something, you have to understand the way it is... what is currently available, what is being used?”

They emphasized capturing a baseline of current definitions across the industry before setting new standards.

9. The Goal: A Shared Language the Entire Industry Can Use

The overall objective was summarized clearly:

“In order for us all to be speaking the same language and have the same usage, we need standardized definitions so we’re not running on different sets of data.”

Participants concluded that clarity, consistency and inclusivity—especially around cultural services—are essential for accurate industry-wide data.



TABLE THREE - DATA VALIDATION

1. Validation Requires Seeing “Every Angle”

The group acknowledged the difficulty of validation due to the industry’s numerous data sources and systems. One participant framed the challenge simply:

“I’m very POS-tech focused... there’s so much different information that I don’t think about.”

They emphasized the need to examine data from diverse company types—manufacturers, salons, spas, independents and tech providers—to ensure validation reflects the full ecosystem.

2. Shifting Salon Models Complicate Data Accuracy

Participants discussed how changes in business models affect the reliability of validations.

For example:

“We’ve seen a decline in the larger number of salons... and we’re challenged with reaching the scale of independent stylists.”

They noted that independents often grow into small teams, demonstrating a dynamic not captured by traditional salon segmentation:

“They want to go on their own... then they realize they have more to offer and start to scale and grow.”

This fluid movement between models introduces instability into validation metrics.

3. Core Industry Baseline: “Everything Starts With How Many”

Accurate validation depends on starting with the most basic question:

“How many salons are there?”

Speakers cited reliance on sources like ISB/ICE Block studies but questioned accuracy:

“If it’s wacky, it’s consistently wacky—so we can see what’s happening. But how accurate is it?”

The group agreed that validating foundational counts of salons, spas, suites and independents is essential.



4. Salon Closures Are a Key Validation Metric

The group highlighted closures as one of the most important—and least consistently measured—data points.

One participant stated:

“The number one problem is not people stealing customers... it’s the salons and spas that are going out of business.”

Others agreed that their largest attrition category was:

“Salons closing left and right... 80% of our attrition is salons closing or downsizing.”

Because closures heavily influence frequency, ticket size and sector health, they must be central to validation work.

5. The Need for a Shared, Neutral Data Warehouse

The table repeatedly returned to the idea of combining data from POS systems into a shared repository:

“If we all got together and put our differences aside... come up with the data and put it into a data warehouse.”

They suggested anonymous data sharing with a neutral analyst to derive unbiased trends:

“Somebody neutral has to go in there and say, ‘Here’s the trend we’re seeing.’”

This would enable more accurate validations across regions and business models.

6. Shifts in Consumer Behavior Require New Validation Approaches

Participants described changing service patterns that complicate validation:

- “Frequency of visit is shrinking—seven visits a year becoming six or five.”
- “Tickets are down... people are trading off to lower-cost services like partial highlights.”
- “Retail is down... we’re offering it in a different way.”

These shifts require updated validation models that incorporate generational behavior, economic factors and changes in service mix.

7. Enrollment, New Stylist Motivations & Attrition

The group emphasized the importance of validating data related to new professionals entering and staying in the industry:

“We’re watching the enrollments of the schools, and we’re watching our attrition as we bring in new stylists.”

They noted that motivations differ between younger students and career-changers—data that must be validated to understand workforce trends.

8. POS Collaboration Is Essential to Industry-Wide Validation

The discussion concluded with a strong statement that validation cannot happen in isolated systems:

“It’s gotta be through the software companies.”

The idea of adding consumer data as a missing validation category emerged again near the end: “There’s a blinding flash of the obvious—consumer data is not on here.”

Participants agreed that combining POS data with consumer insights would significantly improve validation accuracy.



TABLE FOUR - DATA SOURCES

1. The Industry Relies on Many Data Sources—but They Are Fragmented

The discussion opened with a blunt assessment: the beauty industry uses “a dozen different data sources externally,” ranging from the new KIM Report to McKinsey, Yelp, POS systems, payment processors and more. But these sources don’t align.

As one speaker put it, “Our data sources are very fragmented... we’re looking at generalized data that doesn’t always speak to the specific segments any of us represent.”

A second challenge was access:

“The data is often being gatekept... it’s not accessible to the people actually creating the data—the salons and service providers.”

2. Yelp and External Platforms Offer Untapped Potential

Yelp was highlighted as a significant, underutilized data source because it tracks openings and closures in real-time.

One participant noted:

“Yelp is a data business... they’re constantly updating what’s open, what’s closed, what’s trending.”

This kind of dynamic data could significantly strengthen industry-wide insights.

3. The Missing Data Category: Consumers

A recurring theme across the roundtables surfaced here again—the absence of consumer data.

One speaker added:

“We’re not looking at who provides the income for all the people who buy from us.”

They emphasized that without insight into consumer spending behavior, especially among younger generations, companies cannot truly understand demand, trends or market shifts.



4. Point-of-Sale Systems Should Collaborate Instead of Operating in Silos

Another major takeaway involved POS companies, which hold some of the richest transactional data in the industry.

The suggestion was simple but powerful:

“We’d love to see you play together and provide more industry data that could support the entire industry.”

The presenter even joked about getting all the POS companies together for cocktails to spark collaboration.

5. Standardized Definitions Are Essential to Using Any Data Source Well

Although this table focused on data sources, the need for definitions arose because inconsistent language makes every data source harder to use.

A participant emphasized:

“We talked about clearly defining and standardizing our definitions to support the data being produced.”

The group recommended an industry-wide coding system—“based on your service, based on the tools you’re using”—starting in cosmetology schools and embedded in textbooks.

6. Basic Data Concepts Still Get Confused Across Systems

A participant underscored foundational issues in how data is structured:

“There are two breakouts: syntax and semantics. Syntax is the physical... and semantics is what the information is supposed to represent.”

Without resolving these basics, even the best data sources remain incompatible.

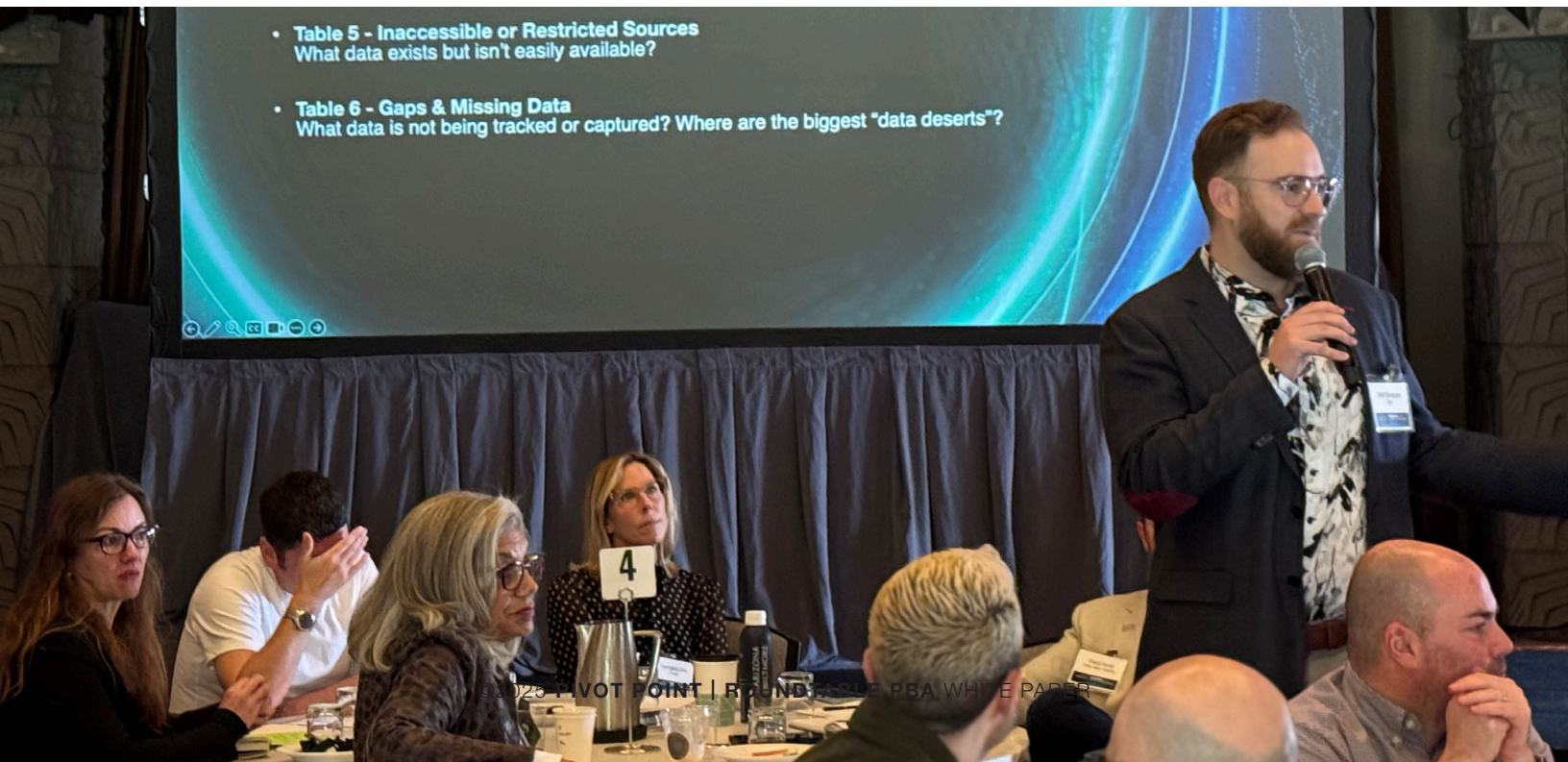


TABLE FIVE - INACCESSIBLE DATA**1. Licensure Data: One of the Most Inaccessible Datasets in the Industry**

The table reached instant agreement that licensure data is one of the most challenging datasets to obtain, despite being foundational to understanding market size, the active workforce and professional mobility.

Participants described the issue bluntly:

“How many licensed and active cosmetologists are there in the U.S.?”

Even national groups struggle to access the information:

“The PBA doesn’t know that... even for them it’s hard to get.”

State boards vary widely in what they report, often requiring payment or offering only minimal fields (e.g., name, address, license number).

Mobility further complicates accuracy:

“They might have as many as 300,000 who live in another state... the numbers get very skewed.”

The group emphasized the need for licensure to include primary workplace info:

“My dream would be that the licensing boards also track their primary place of employment.”

2. Wage & Earnings Data: Incomplete, Misleading and Distorted by Tax Behavior

Participants identified wage data as a second major inaccessible category. Current publicly available numbers—provided by the Department of Labor and the IRS—capture only W-2 earners, not independent contractors or those paid in cash.

One comment summarized the frustration:

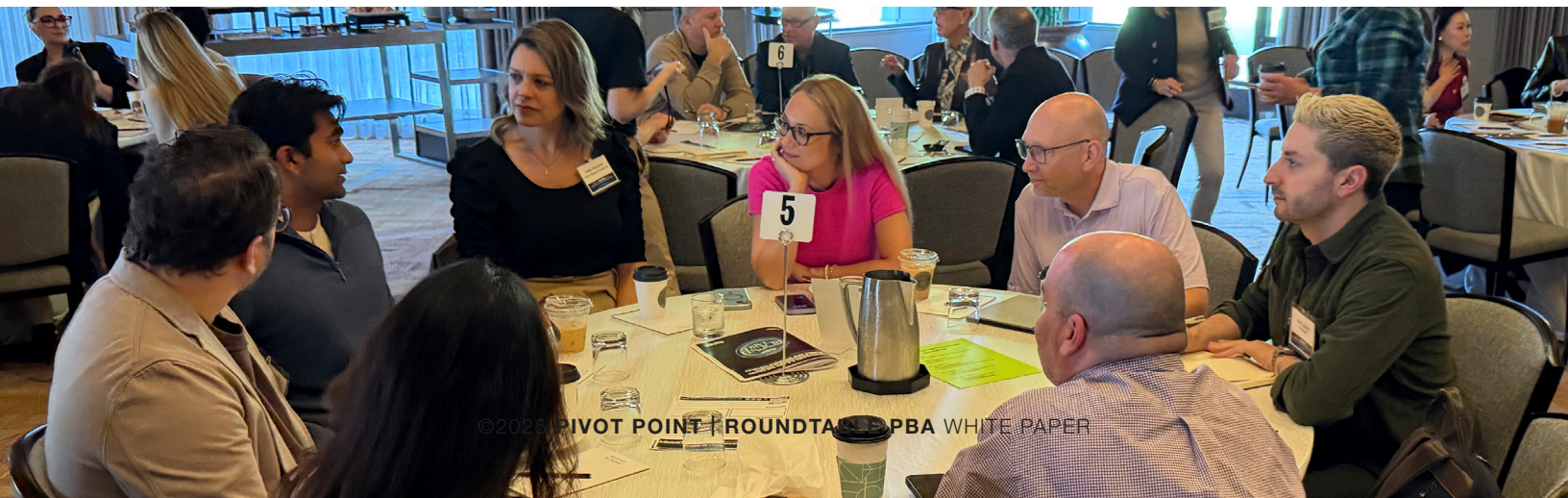
“When you look up what an average stylist makes... they’re way below the poverty line, which is only half the story.”

They also noted that upcoming changes in tip reporting could alter income data dramatically:

“It’s going to be interesting to see how that data changes over the next couple of years.”

A key point: hourly earnings matter more than annual totals:

“How much is this industry actually earning by an hour?”



3. Market Structure Data: Employee, Contractor, Renter—Largely Invisible

A primary missing dataset is reliable segmentation of where and how professionals work—employee, suite renter, independent, contractor.

“Employee versus contractor versus renter... we don’t know where they’re actually working.”

Participants argued that licensure systems should capture worksite information, similar to medical or nursing boards. But professionals frequently change work settings, making tracking difficult without annual updates.

The absence of this data obscures workforce trends, labor patterns and economic impact.

4. Consumer Behavior & Multi-Location Service Patterns: Nearly Impossible to Track

The group agreed that consumer behavior—especially whether clients visit multiple locations—is poorly captured because many salons do not store guest information or use CRM systems.

As one participant noted:

“It’s really inaccessible to track... are they going to multiple locations to get services?”

Guest checkout, phone bookings and limited data capture leave the industry without insight into:

- Client loyalty
- Cross-service journeys
- Service mix decisions
- Brand switching

Another participant summed up the gap:

“It’d be nice to know consumer behavior in a little more detail, too.”

5. Service-Level Transaction & Utilization Data: Fragmented by Naming Conventions

The group agreed that even where POS data exists, service names are so inconsistent that industry-wide analysis is nearly impossible.

“Everyone names their services differently... we have to check it because the naming conventions are so different.”

The group echoed themes from other tables, noting that standardized service codes would make inaccessible data more usable.

One idea captured the consensus:

“You could call it whatever you want, but tag it in the back end so the data can fall into buckets.”

6. Privacy-Restricted, Proprietary or Trade-Secret Data

It was highlighted that several data categories are inaccessible for legal or competitive reasons:

- HIPAA-related med-spa data
- Customer personal data (GDPR/CCPA)
- Internal proprietary business data
- Undisclosed product formulations
- Research datasets requiring expensive purchase (e.g., Euromonitor, Mintel)

As one participant summarized after scanning examples:

“These sources are restricted due to privacy regulations, intellectual property protections and competitive advantage concerns.”

7. Fragmentation and Lack of Centralization: A Core Structural Barrier

The overarching theme was decentralization—it was suggested that we have thousands of locations, each with its own systems, policies, and terminology.

“The gaps exist because of fragmented ownership models, privacy regulations and inconsistent reporting across thousands of small businesses.”

“With over 444,000 licensed salons, spas and barbershops... decentralization makes it nearly impossible to gather standardized data.”

8. Structurally Inaccessible Data Areas

The table identified five structurally inaccessible data areas:

1. Licensure counts and professional mobility
2. Earnings and compensation (especially for independents)
3. Workforce segmentation and employment structure
4. Consumer journey and service-location behavior
5. Service-level transaction detail (due to naming inconsistency)

Much of the problem stems from a single root cause:

“Lack of centralized reporting, privacy compliance, informal structures and market diversity.”

The table reinforced that significant parts of the beauty industry remain unmeasured, unreported or fundamentally invisible—making it difficult for any stakeholder to answer even basic questions about market size, workforce trends or consumer behavior.

TABLE SIX - GAPS

1. The Biggest Gap: The Industry Has “No Data” in Key Areas

The table opened with a candid acknowledgment that the beauty industry lacks fundamental data. One participant joked that this table had the “easiest topic because we have no data,” underscoring the significant gaps.

Early on, a participant framed the issue:

“Obviously if you knew number one and number two—what’s available and what’s not available—it’s a gap.”

2. Lack of Segmentation Makes Existing Data Unreliable

A central theme was that industry data sources do not segment meaningfully by business model, geography or service type.

For example, speakers criticized certain reports for lumping unrelated salons together:

“You could be a salon suite in New York City compared to somebody in Paducah, Kentucky... that’s not clear data.”

They identified segmentation gaps across the board:

- Suite renters vs. employees
- Independent stylists
- Salon size
- Age groups
- Vietnamese nail salons vs. others
- Service categories

As one person summarized:

“Any data considered respectable... completely lacks any sort of segmentation.”

3. Entire Categories Are Missing—Especially Nails

A significant data gap exists in the nail sector.

One participant revealed:

“The nail category does not include the Vietnamese salon sector... and that represents 60% of the business in America.”

Because much of the work is cash-based, it is not captured by current systems. This omission distorts industry numbers and obscures a significant portion of the market.

4. Missing Career-Path and Workforce Data

Several speakers emphasized the absence of data showing how professionals move through the industry.

Examples included:

“Did you go right from beauty school to a suite? Did you leave the industry a year later? We can’t track any of that.”

They also noted a lack of understanding around:

- Who stays vs. who leaves
- How long stylists remain in the field
- Career success by segment
- Owner demographics
- Age and cohort trends

This gap makes it impossible to understand workforce stability or decline.

5. Lack of Context: No One Knows the Real Size of the Industry

The group repeatedly returned to the most fundamental missing data point:

“How many salons are there? Really, truly?”

They listed conflicting estimates from different sources—Pivot Point, Milady, AACCS—all providing different counts. The same confusion applies to:

- Number of schools
- Number of licensed pros
- Number of active pros
- Number of independents

One speaker summarized:

“We don’t have a true understanding contextually of just what the market is.”



6. Income & Compensation Data Is Deeply Flawed

Participants highlighted the conflict between various income sources:

- Department of Labor (based on W-2s)
- KIM Report (based on service dollars)
- Self-reported stylist income
- Industry research

The group noted the Department of Labor numbers—“\$25,000... now up to \$30,000”—which sparked frustration but only reflect W-2 employees, not independent contractors.

None of these sources accurately captures independents or suite renters.

7. Independent Stylists: A Large, Poorly Measured Segment

The group aligned around a commonly cited estimate:

“Around 60% of stylists in the U.S. are independent.”

It was discussed that this was based on cross-referencing SalonCentric data, IRS categories and the Bureau of Labor Statistics. But even so, it was admitted:

“We don’t know if it’s 1.3 or 1.4 million... It’s not a small gap.”

Given that independents are now the majority, this missing data severely impacts the understanding of market size and behavior.

8. High Turnover in Suite Renters—But No Good Data

Another important but poorly tracked trend is suite turnover. Participants cited estimates that:

“40% of them are turning in a fairly significant time frame.”

But they acknowledged this is based on anecdotal or hard-to-access sources:

“Not good data, though.”

9. Uncertain Economic Size of the Industry

The table struggled with the decades-old question:

“How big is the industry?”

They cited numbers that have fluctuated for years:

- \$64B
- \$50B
- \$40B

One participant said plainly:

“I have no clue what reality is.”

This is due to a lack of clear segmentation, missing data from independents and underreported cash sectors.

10. Missing Trend Data Across Age Groups, Services, and Consumer Behavior

Participants emphasized the need for real-time and segmented trend data:

“Trend data is a big deal... the market’s moving so fast.”

They cited challenges in tracking:

- Hair trends
- Client behavior
- Service mix shifts
- Generational differences

One participant said they now issue a monthly trend report because “it’s really hard to come down” as trends accelerate.

11. No Official Taxonomy of Services

A structural gap emerged:

“There is no official taxonomy for services.”

Without consistent naming conventions or definitions, data cannot be aggregated reliably—making service-level insights nearly impossible.

12. Fragmentation Across All Data Sources

The group identified overarching themes:

- Fragmented sources
- Inconsistent definitions
- Narrow datasets
- Limited access
- High cost of external data
- Missing segments (independents, nails, part-timers)

One participant summed it up:

“We’re all doing exactly the same thing with 10,000 people going to the same places—and we still can’t answer basic questions.”



TABLE SEVEN - RECRUITMENT & RETENTION

1. Enrollment Trends: Cosmetology Rising, Esthetics Falling

The discussion opened with data showing a shift in program demand. One participant highlighted a significant divide:

“We’re seeing an uptick in cosmetology enrollments. We’re seeing a downward trend in esthetics... esthetics down about 18%, year over year.”

While esthetics programs have been booming for a decade, they now face capacity and placement challenges. Cosmetology, meanwhile, appears to be rebounding after several years of decline.

Schools noted that esthetics is resource-intensive:

“It takes a lot more investment and equipment... schools are having a more difficult time getting their students placed.”

2. Retention Challenges: “Everyone’s real gung-ho in the beginning... then sustaining it is the problem.”

Participants described a consistent pattern where enthusiasm drops quickly after enrollment or hiring.

One speaker summarized it bluntly:

“They come in real pumped, and then it’s sustaining... that’s always been the mystery in my mind.”

This lack of early-career stamina was linked to unrealistic expectations, slow progress and a desire for quick results fueled by social media.

The table noted traction issues at two points:

- During school
- In the first job after graduation



3. The Independent vs. Employment Path

A major retention theme centered on where graduates choose to work.

There is uncertainty after graduation:

“Where do they go after graduation? We’re still fighting that... Ulta? A commission salon? Independent?”

The group noted the industry’s push to discourage immediate independent work due to low retention and slow client acquisition:

“Retention numbers have gone up because you don’t have guests. You have to establish yourself... and they don’t realize that takes time.”

Participants agreed that new stylists often underestimate the business and marketing skills required to succeed independently.

4. Resistance to Assistant Programs and Structured Career Paths

Assistant programs—common in many salons—are designed to create long-term success, but new professionals frequently reject them.

“They say, ‘I don’t want to be an assistant. I want my own chair.’ But you’ve got to build your name up.”

One leader described the reality of skill-building:

“It takes a year to train someone to be successful... your friends that want to hop to college, it takes them four years.”

5. The Social Media Effect: Unrealistic Expectations of Instant Success

Participants repeatedly flagged social media’s influence on career expectations:

“You look at influencers... everyone wants the lights on them and the followers. But everybody’s got to start somewhere.”

This gap between aspiration and daily work contributes heavily to early burnout.

6. The Role of Age: When Do Students Succeed Most?

The group discussed whether younger students succeed more due to familiarity with structured environments.

High school-age entrants may transition better:

“They’re coming from school every day... It’s less of an adjustment.”

But others argued that older students may be more motivated:

“Two years of being out there without direction probably made me a better student... I understood if I don’t get this right, I could be working at the grocery store.”

The table agreed that age-based performance and retention data could be extremely valuable.

7. The Seven-Year Burnout Point

One participant described a widespread trend among nail professionals:
“At seven years, I said hell no, I don’t want to be at this table forever.”

They traced burnout to poor client management skills, which aren’t taught in school:
“I let clients control my existence... I didn’t learn how to manage expectations.”

Others echoed similar experiences on the hair side.

8. Entrepreneurship Pressure: “They want to go straight to owning their own business.”

Participants noted an accelerated desire for ownership among new students and grads:
“Admissions hears it every day: ‘I want to own my own business.’”

This trend has also hurt sectors like lashes:

“We’ve seen lash artists say, ‘I’ll go on Alibaba and start my own brand.’ And many later say, ‘I made more money just being a lash artist—I wish I’d waited.’”

The group emphasized messaging around long-term career development rather than immediate ownership.

9. Need for Better Data on What “Makes It Stick”

Participants expressed interest in data that could identify:

- Ideal age ranges
- Successful student profiles
- Retention triggers and drop-off points
- Career-path milestones

As one speaker said:

“What is the sweet spot? What helps it stick for them?”

This could help schools and employers target enrollment, mentorship and career support more effectively.

10. The Need to Capture These Insights in a Report

The session wrapped with the understanding that the findings will feed into a larger report:
“We do create a white paper out of these... this is important.”



TABLE EIGHT - BUSINESS PERFORMANCE

1. Two Levels of Business Performance: Internal vs. Market

Participants began by defining two distinct layers of performance analysis:

- Internal performance – how a salon evaluates its own KPIs
- Market performance – how that salon compares to others

One speaker captured the distinction clearly:

“There are two ways of looking at business performance... what you’re looking at internally, and then how you establish how your business is doing in the market.”

Without external benchmarks, salons can’t understand whether their numbers are strong or weak. As another added:

“If you don’t have the market, it’s difficult to know if you’re performing well or not.”

2. The Industry Overfocuses on Commission Salons and Overlooks Independents

A primary concern was that industry conversations still skew toward traditional commission salons, despite independents and suites dominating the landscape.

One educator shared a striking statistic:

“Eighty percent of their business comes from salon suites or independents.”

They argued the industry must stop sidelining independents:

“I feel like we always just think about big commission-type salons... and that’s not where the industry is right now.”

They stressed the importance of reframing data in “bite-sized chunks” so booth renters and solo stylists can see themselves as legitimate businesses—and use the data to improve.



3. Defining “a Salon”: Business Units vs. Models

The KIM Report’s methodology sparked an important insight:

“In KIM, the definition of a salon is a business unit... a solo is a salon, a two- or three-person business is a salon, a 20-plus is a salon.”

This allows more equitable comparisons and segmentation across business types.

They described running multiple cuts of the data:

- All salons
- All salons except solo
- By cohort sizes (e.g., 5-9 stylists)

This helps a stylist or owner answer the practical question:

“Am I comparing myself to the right group?”

4. Internal KPIs Are Meaningful — But Not in Isolation

Participants discussed KPIs such as:

- Average ticket
- Sales per labor hour
- Productivity
- Commission structure
- Cost of goods
- Mix of services

One business leader explained the challenge of internal-only metrics:

“Goal is set by an internal finance team... so being able to compare it to industry data would be very helpful.”

They also noted that decisions around commission structures (some going up to 70%) must balance stylist satisfaction with business sustainability:

“We can have some of those folks, but we don’t want all of those folks—we make no money.”

5. Data From Single Platforms Can Be Skewed

Software-platform-specific datasets often reflect their customer base rather than the whole industry.

As one participant explained:

“One single software platform is often strong in a specific market... so the data is skewed toward that market and not the whole industry.”

This is why multi-platform data (e.g., KIM’s aggregation of seven systems) is seen as so important.

6. What Data Is Accessible—and What Isn't

Participants agreed some metrics are readily available:

- Average service transaction
- Average color transaction
- Number of new clients
- Regional performance
- Brand penetration

But deeper insights remain difficult:

“Anything that has to do with payroll performance, profitability... It's very hard to get at the industry level.”

Payroll and profit margins require sensitive worker-identifying data, which raises privacy and compliance barriers.

7. “Averages Are Scary”: Why Aggregated Numbers Mislead

A key caution was that industry averages often conceal more than they reveal, especially when considering market segments and geographies.

One speaker highlighted the problem:

“The average transaction right now goes from \$85 to \$120... so saying the average is \$89.93 means absolutely nothing to half the salons.”

This reinforced the need for segmentation and contextual benchmarks.

8. Data Alone Isn't Enough—Stylists Need Actionable Guidance

Even when data is available, many stylists don't know how to apply it.

One participant explained the gap:

“Once they have the data, what do they do with it? They need the action to help them beat the median.”

This is where coaching, brand education and distributor training teams play a critical role.

Another noted the emotional component:

“You've got to make something emotional that the independent or the hairdresser wants to do... the numbers alone are scary.”

9. The Fundamental Problem: “We Don't Really Know the People in This Industry.”

A significant moment in the discussion was the recognition of a deeper structural gap:

“We don't really know the people who work in this industry. We don't know their business. We don't know what the hell is going on.”

This speaker argued the industry must first understand who stylists are, what they want and how they operate—only then can data truly drive performance improvements.

They described the cultural challenge:

“Everybody tries to hide their information. It's a cultural issue that affects the business issue.”

10. The “Hidden Market” and the 30% Gray Economy

Several participants acknowledged a large segment of the industry that operates outside formal reporting:

“There’s about 30% of the industry in the black market or gray market... they still perform services and charge money, but they don’t consider themselves a business.”

Because they do not report or track data, they remain invisible—and unreachable from an improvement standpoint.

One salon owner noted many legal businesses do care and try:

“There are a lot of salons who do care and do try to run a business.”

The group aligned on focusing data efforts where they can make an impact: official, reporting salons.

11. Data Sharing Depends on Culture and Trust

Participants closed by noting that most resistance to data sharing isn’t technical—it’s emotional or cultural:

“People hide their data... they don’t want to do it.”

But the presenter stressed that anonymized data is safe:

“As long as you’re not taking individual people... and we’re not.”



TABLE NINE - LEGISLATIVE, REGULATORY & ADVOCACY**1. Schools Face Increasing Legislative Pressure and High-Stakes Policy Battles**

Participants stressed that major federal and state policies are reshaping beauty education—often without the industry being fully informed. One school owner highlighted this with urgency “We have already slammed legislation... everything from nursing to welding to community colleges.”

They described fighting multiple lawsuits, including the Biden administration’s borrower-defense rules:

“For any student, for any reason, they could check a box to get their loan forgiven... and the school would have no ability to say how they were harmed.”

Another major example was the long-running fight over “bare minimum hours,” where the team successfully won a national injunction:

“If that had passed, most massage schools across the country would have closed... they wouldn’t have access to funding.”

Participants agreed that many in the industry simply don’t know these threats exist.

2. Hour Requirements, Licensure Fragmentation and Skill Decline

Several leaders expressed concern that shrinking hour requirements and the disappearance of apprenticeship programs are lowering competency.

One participant made the point sharply:

“A cosmetology license is kind of like a license to kill... You can do anything.”

And yet:

“I don’t think 1,500 hours is enough time... we’re not as good at what we do as we were 20 years ago.”

They warned that without proper training, confidence and quality suffer:

“It kills the confidence of a hairdresser.”

The group also discussed inconsistent state-by-state standards, especially for lashes and brows:

“Why is Texas 320 hours and Arizona 30 hours?”

They argued that having all requirements centralized in one place is essential for effective advocacy.

3. Lack of Accessible Data Makes Advocacy Harder

A recurring theme was that critical data—including hours, passing rates, licensure patterns and earnings—is available but not shared widely enough.

One participant challenged the group directly:

“Just because one school has that data, is that data readily available to everyone?”

Another warned that protecting data harms the entire sector:

“A lot of people feel data should be protected... their secret sauce. But empowering everybody makes us all stronger.”

The group agreed that national organizations should help distribute regulatory and licensure data in an unbiased way:

“The PBA is a place that can distribute it and be trusted... they’re here to represent the industry as a whole.”

4. Widespread Unlicensed Practice and Confusing Licensing Structures

Participants highlighted major inconsistencies between what people are trained to do and what they are licensed to do.

For example:

“There are 23,000 licensed nail professionals in California who also have an esthetician license... but only 5,000 with a combined license.”

Many complete the training for multiple disciplines, but choose only one license because of fees and time:

“There’s a lot of unlicensed practice... nobody’s policing that.”

They suggested a unified license and test would reduce complexity and improve compliance.



5. Advocacy Needs Better Messaging—Starting With What We Call the Career

The conversation turned to public perception. Participants argued that language shapes credibility:

“You keep saying ‘college’ and ‘career.’ Very few people in our industry go to college, and it’s not seen as a career... It’s seen as a job.”

This mismatch contributes to poor outcomes:

“The average hairdresser lives below the poverty line... it might come from exactly what you’re saying.”

The lack of structured apprenticeships and strong early training further worsens the experience of new professionals.

6. Students Often Arrive After Other Career Attempts—and With Debt

One school leader shared a striking statistic:

“Most of my students that come out of college first come in with debt.”

The group agreed that the industry needs to reach people earlier, including through salon-based advocacy tools such as QR codes and visibility campaigns.

7. Unified Industry Advocacy Could Increase Visibility and Respect

Participants brainstormed ways to elevate the profession and attract stronger candidates:

“I would love to see every salon have a Beauty Changes Lives kiosk... do something you love.”

Others emphasized storytelling and pride-building:

“I call it ‘We Love Our Job’... When people see the sign, they’ll ask what it means and it opens a conversation.”

They argued that widespread, coordinated messaging could shift public understanding of beauty as a meaningful and rewarding career.

8. Understanding Consumers

Participants stressed that without data on how the next generation views and spends money, no amount of legislative or school reform will position the industry for the future.



TABLE TEN - DATA USE RESTRICTIONS**1. No Shared Understanding of What “Data Use Restrictions” Actually Are**

The group opened by acknowledging that the term itself was unclear:

“Honestly, out of all the topics up there, it’s the one that I probably could use even some clarity around.”

2. Mandatory Legal Restrictions: Privacy, Licensing, Compliance

The clearest restrictions are those defined by law, including HIPAA, state privacy rules and compliance requirements for schools, manufacturers and franchisors.

Examples included:

- Schools cannot make earnings promises:
“We could not have any content suggesting you’re going to make six figures.”
- California-level consumer privacy protections:
“If you live in California like I do, it is against the law... you can’t share any data.”
- State boards vary wildly in what data they release:
“They only provide names, license numbers, physical addresses... no email.”
- International packaging regulations:
“My bottle has to be EU-compliant... I have to say the word ‘fragrance.’ I’m restricted from using the real word I want to.”

These restrictions apply regardless of personal preference:

“Some of those restrictions do not need judgment because they are law.”



3. Ethical Restrictions: Doing the Right Thing

Participants emphasized that not all restrictions come from legislation—many come from internal values or the need to protect trust.

“From an ethical standpoint, people really shouldn’t be sharing data.”

“There’s a morality piece... what’s right, what’s wrong?”

Brands described choosing not to engage in practices that could undermine customer relationships or franchise partnerships, even when technically permissible.

One participant shared a real-world example:

“Our customer has to say ‘yes’... but then your franchisees need to say they’re okay with you selling directly to their patrons.”

This creates an ethical boundary beyond the legal one.

4. Voluntary/Contractual Restrictions: Agreements Between Partners

Another layer of restriction arises from contracts or shared data models:

“We have to agree that your company’s results won’t be shared... You bury the pieces that would expose something.”

Franchise agreements were highlighted repeatedly:

“The franchise agreement defines how you can stop the data.”

5. Barriers vs. Restrictions: Consumer Apps & External Validation Systems

Manufacturers introduced another dimension: “barriers” that aren’t restrictions but still distort data use.

Apps like Yuka or EWG were a big example:

“It’s not transparent at all... It’s a pay-to-play situation.”

“We know the ingredient world, but it conflicts with what the consumer is seeing.”

The group differentiated between:

- Restrictions (laws, privacy rules, contracts)
- Barriers (third-party systems that distort or block accurate data use)

6. Opt-In/Opt-Out: The Customer as the Ultimate Gatekeeper

Participants stressed that the cleanest, most reliable data comes directly from customers who explicitly give permission:

“The best data you’re going to get is when the customer gives it to you.”

But this also introduces new obligations:

“Any kind of data mining is opt-in, opt-out. The customer has to say yes or no.”

Salon examples included:

- Check-in apps that require medical disclosures
- Emergency contact info
- Segmentation between HIPAA-relevant data and general customer data

This requires careful data segregation:

“You have to be able to take the HIPAA piece out but still use the contact piece.”

7. A Universal Challenge: Different Roles Mean Different Restrictions

The group concluded that restrictions vary dramatically depending on whether someone is a:

- Manufacturer
- Franchisor
- Franchisee
- Data company
- Barber/salon brand
- Research organization

“There are so many different parameters... it depends on whether you’re a manufacturer, a franchisor, a data company.”

What constitutes a “restriction” varies depending on the seat you occupy.



TABLE ELEVEN - AN INDUSTRY DATA STORY

1. Lack of Common Definitions Weakens Industry Data

Participants emphasized that inconsistent terminology across states, accreditors and associations makes beauty-industry data unreliable. As one speaker put it, “We don’t even know what total sales of our industry is because we don’t all define the same.”

Questions as basic as “Is it a salon? Is it a barbershop?” illustrate the problem.

On the school side, terminology mismatches are equally disruptive: “You may be talking in language that doesn’t translate to the accreditor... something as fundamental as an additional classroom space vs. a branch campus.”

The group agreed that “consistent terminology” is essential for producing clearer, more accurate data.

2. Need for Beauty to Claim Its Own Narrative

A central theme was reclaiming the profession’s story. As one speaker said, the field has long been marginalized by others:

“Other people have always claimed the narrative for us... Hair is what you do if you can’t do anything else.”

Participants argued the industry must own its narrative:

“It’s about time we really claim it on a bigger level... aspirational career, flexibility, job opportunities, financial growth, ownership.”

This narrative shift, they noted, is supported by broader cultural momentum:

“There couldn’t be a more perfect time... an appetite in our popular culture for trades.”



3. Media and Associations Often Produce Data Silos

Speakers noted that associations and media outlets frequently create data, but it remains inaccessible unless one attends their events or is part of their membership:

“Unless you go to their conference or are part of their system, you don’t really see it.”

Another raised concern about outside data sources misrepresenting the field:

“Bureau of Labor Statistics and IRS data... everyone hates it.”

These sources reinforce negative income narratives such as “you can’t make money, it’s a side hustle,” which do not reflect real career outcomes.

4. The Importance of Attitudinal & Quality-of-Life Data

Participants highlighted that some of the most powerful information is not financial but human.

“Part of it is quality of life, quality of work-life balance.”

A speaker referenced surveys asking only three questions—attitude, optimism and perceived financial stability—describing them as valuable because “the kind of data that doesn’t exist in numbers that greatly vary.”

This type of insight strengthens the industry’s story, especially when combating incomplete or misleading narratives.

5. A Call for Unified Industry Efforts

A recurring theme was the need for a single coordinating force across associations and media to harmonize data collection:

“There has to be one force to pull it all together.”

Participants felt fragmented efforts could be unified into a stronger, shared data system.

6. Regulation, Misinterpretation and the Fight Against Licensing Attacks

Much of the discussion focused on how poor data is used to undermine beauty education and licensing.

Speakers explained how gainful-employment metrics, federal data and media outlets often paint a distorted picture:

“The data is bad, the metrics are bad... It’s terrible.”

“They interview disgruntled dropouts—a sliver of a sliver—and judge all of us based on that.”

They stressed the importance of telling true, long-term success stories:

“What are these students doing five, 10, 15 years later? They’re doing amazing things.”

Another key point: licensing protects public safety:

“We’re not regulating excellence; we’re regulating safety.”

Yet, deregulation advocates often use flawed or incomplete data to push their agenda, creating narratives that the industry must counter with its own data.

7. Safety and Risk Data: A Missing but Valuable Category

Participants suggested gathering data on injuries—both licensed and unlicensed—to support regulatory arguments:

“There’s some dangerous chemicals, sharp objects, heat... even when you’re trained things happen.”

They noted the public rarely sees this because incidents are often quietly resolved:

“Nobody wants to talk about it... liability insurance handles it.”

But surfacing such data would strengthen the case for maintaining standards and licensure.

8. Data Must Support the Right Story

The discussion culminated in a communications insight:

“You can have one fact and wrap a story around it. That’s where you become persuasive.”

They stressed the need to determine what data best supports the story the industry wants to tell—whether about:

- Graduate success
- Student pathways
- Salon owners
- Safety
- Economic impact

As one speaker asked, “What is the data we want to tell our stories with?”

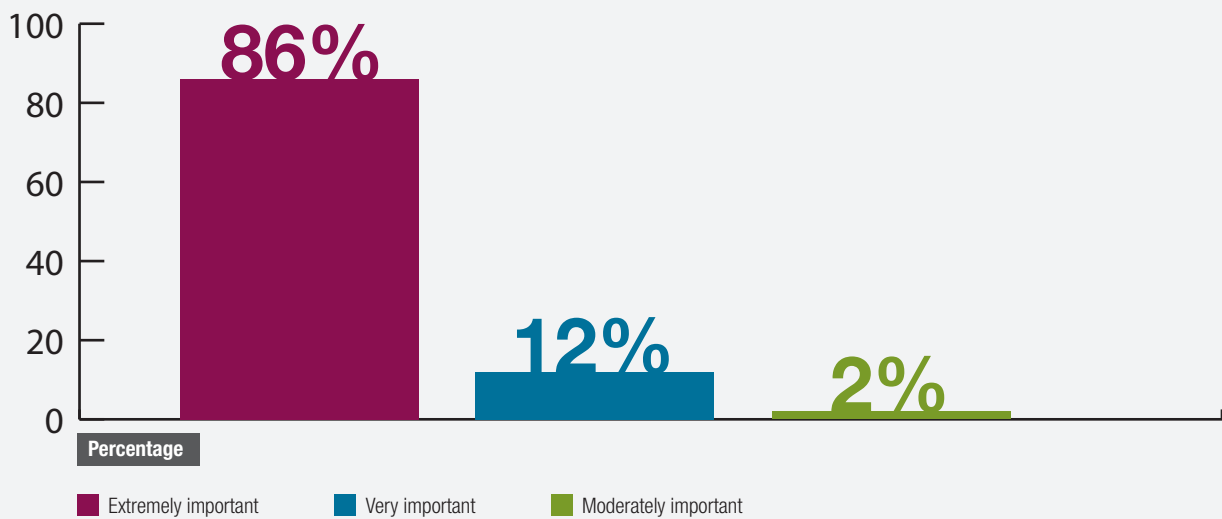


RESEARCH

On-site research of the Roundtable participants confirmed an overwhelming alignment on the critical nature of the topic and the prioritization of next steps:

- 86% of participants said collaboration around data is “extremely important.”
- Standardizing data/definitions and creating a unified industry narrative were listed as the top immediate priorities by more than half of the attendees.

Q1: How important or unimportant do you believe collaboration around data is across the professional beauty industry?



Q2: Which two areas would provide the greatest immediate benefit if the industry collectively worked on them? (Select up to 2)



VERBATIM COMMENTS

DATA FRAMEWORK

(Definitions, rules, ownership, structure, standardization)

- “We need standardized language and rules across states.”
- “No one is on the same page. Need standardization of language.”
- “The need for standardization across the industry.”
- “Creating clearer definitions to be used across the industry as a whole.”
- “Need for clear data definitions and more collaborations to get a true set of industry data.”
- “The inconsistency that exists with the data, how you determine the critical data and how do you share the story.”
- “Agreement around the room that there are gaps that need to be filled and the data we are getting isn’t always standardized and can be inaccurate.”
- “The validation of data is my biggest need, and I believe the whole community’s.”
- “The need to establish who owns the data.”
- “Need a standards development body.”
- “We need action items coming from a centralized group.”
- “That there is a lot that can be done to standardize and create transparency, that could potentially be done sooner than later.”
- “Appropriate data for all segments of the industry and how to use the data from a single suite stylist to a large commission multi location salon. Don’t forget the barbers.”

DATA SOURCES

(Where data comes from, availability, gaps, consumer info, POS, resource awareness)

- “Take a deeper dive into the data resources that are available.”
- “A lot of data is available but it is fragmented and needs to be pulled together.”
- “There needs to be education FOR the industry BY the industry on what is available by what is not.”
- “I heard a lot about missing consumer data but there is some of that, it’s just gated and pay to play, so who can bring it to all of us?”
- “Consumer info is needed.”
- “Understanding and research more on legislations.”
- “New data source options.”
- “KIM data information.”
- “The lack of access to industry-wide data.”
- “There are large gaps between financial data and what professionals actually generate in revenue.”
- “It’s hard to find the reliable data for cosmetology industry—especially like salon and academy industries.”
- “Tons of data still out there that we don’t have nor utilize.”
- “The realization that gaps are significant and difficult to narrow.”
- “How big the gaps really are in industry.”
- “The industry’s data is fragmented, and it’s not being shared with all stakeholders.”
- “Salons are the originators of data but lack the benefits and access.”

DATA USE CASES

(How data is used, usefulness, application, access, relevance, operational challenges)

- “That some of the most important trends in the industry aren’t understood because of a gap in actionable insights.”
- “The complexity of getting the accurate data to the right people in the right format and how to make it useful to salons.”
- “The data that exists and what success looks like for those gathering initiatives is disparate.”
- “The people who provide the data (salons and stylists) don’t have access to the data and need to have access.”
- “Trade media needs to play a bigger role in elevating the industry.”

COLLABORATION – CREATING A UNIFIED INDUSTRY DATA STORY

(Collaboration, unification, coalition, shared narrative, big-picture alignment)

- “We are more aligned than maybe we realized. And need to work together to solve this.”
- “Need for unification to further the conversations.”
- “Collaborate across the industry is key.”
- “Inspired that this topic is relevant for so many businesses in the room.”
- “We all agree there are huge gaps. Need to take action to unite.”
- “More conversations are needed and a steering committee can assist in leading the initiative.”
- “We need to unify.”
- “Collaboration and communication pathways must be identified to facilitate progress on collection, analysis, etc. Maybe ‘work groups’ could be identified to continue this work before the next roundtable!”
- “We need to continue the conversations and agree on topics that will move the industry forward.”
- “Insights were too numerous to list. This was amazing.”
- “We are finally moving forward with data.”
- “We need credible data as an industry.”
- “Need for advocacy on the career.”
- “The shared valuable perspective of the cross-channel partners in the room.”
- “Unified thirst for ‘real’ data.”
- “There is a widespread need for quality data and elevation of industry standards to ensure the success of the industry’s future.”
- “Greater awareness of the common challenges around data that impact all of us.”
- “We need a data coalition, and someone needs to own it.”
- “That there is a strong momentum towards collecting and making all the data about the industry available.”

VERBATIM FEEDBACK ON THE ROUNDTABLE**General Feedback**

- “It was a great discussion and first step.”
- “Great job.”
- “Very engaged.”
- “The roundtable discussion was incredible.”
- “I love that we all were so transparent and keeping each other’s thoughts valuable to the conversations.”
- “Excellent.”
- “It is a great format, thanks.”
- “Amazing topic and strong group of people.”
- “Too numerous to list. This was amazing.”

Table Sessions

- “It was great. I believe the division of topics was great and allowed each table to focus.”
- “We need more time so we also find solutions to the suggestions and ideas raised.”
- “More time to collaborate would be great!”
- “Longer time for the discussions... with such a robust topic we could have gone longer.”

Suggestions for Follow-Up

- “More frequent touch points to continue the momentum of the work being done.”
- “Need a clear action for follow-up.”
- “Next steps with time line.”
- “Develop work groups to move the data needs/resource needs forward... seems a shame just to leave here and not harness this energy!”
- “Keep this effort going. I’m in as a volunteer.”
- “Love it. Just who is going to own the next steps?”





BEAUTY CHANGES LIVES®

Beauty Changes Lives (BCL) is a 501(c)(3) nonprofit organization dedicated to empowering current and future professionals by elevating beauty, barbering and wellness as a first-choice career.

BCL brings the industry together—uniting brands, educators, associations and leaders—to address critical challenges and build a more vibrant, inclusive future.

Through scholarships, mentorships, advanced education and national awareness campaigns, BCL has helped thousands of aspiring artists launch successful careers. As the #1 resource for industry scholarships, BCL awards over \$500,000 annually and has directly impacted the lives of over 1,500 professionals.

Signature programs like Mentorship Matters and the Industry Leader Roundtable foster collaboration and thought leadership, while ongoing efforts elevate the visibility, value and impact of careers in beauty and wellness.

BCL is not only a scholarship engine—it is a powerful community platform that inspires the next generation and drives meaningful, long-term change across the industry.

Get Involved & Learn More

- **Learn About Our Industry Initiatives:** beautychangeslives.org
- **Support Our Mission:** beautychangeslives.org/get-involved
- **Be Part of the GALA:** beautychangeslives.org/gala
- **More About Our Industry Leader Roundtable:** <https://beautychangeslives.org/roundtable/>

Contact:

info@beautychangeslives.org

beautychangeslives.org



Lynelle Lynch
President



Lisa Roeberg
Executive Director



NONPROFIT • ADVOCACY • COMMUNITY

The Professional Beauty Association (PBA) is the leading membership organization uniting beauty professionals to shape the future of the industry. We keep professional beauty professional—championing policies that protect the industry, providing trusted resources, and fostering a powerful community built on connection, creativity, and growth. We serve licensed professionals, salon, spa and barbershop owners, independent stylists, students, distributors and manufacturers—providing the education, resources and advocacy they need to succeed today and thrive tomorrow.

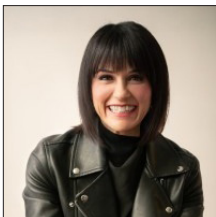
We are the platform for excellence—home to North American Hairstyling Awards, Beacon Student Program and Executive Summit—and the catalyst for change, strengthening businesses and supporting beauty professionals in times of crisis through the PBA Disaster Relief Fund and other charitable programs. When beauty thrives, we all do.

Learn more and be part of the movement defining what’s next in beauty. [probeauty.org](https://www.probeauty.org).

- **NAHA:** <https://www.probeauty.org/north-american-hairstyling-awards/>
- **Beacon:** <https://www.probeauty.org/beacon-student-program/>
- **Executive Summit:** <https://www.probeauty.org/executive-summit/>
- **PBA Charities:** <https://www.probeauty.org/pba-charities/>

Contact:

info@probeauty.org



Leslie Perry
CEO



Jay Elarar
CEO Americas,
MoroccanOil,
PBA Board of
Directors Chairman

Unite As One
SECURING THE FUTURE OF THE BEAUTY, BARBER & WELLNESS INDUSTRY

<ul style="list-style-type: none"> American Association of Cosmetology Schools (AACCS) American Lash Association (ALA) American Massage Therapy Association (AMTA) Associated Hair Professionals (AHP) Associated Nails Professionals (ANP) Associated Skin Care Professionals (ASCP) Associated Bodywork & Massage Professionals (AB&MP) Beauty Changes Lives (BCL) Career Education Colleges and Universities (CECU) Esthetics Council (EC) Cosmetologists Chicago (CC) Green Beauty Community 	<ul style="list-style-type: none"> International Nail Technicians Association (INTA) Intercoiffure America Canada (ICA) International Spa Association (ISPA) International Salon & Spa Business Network (ISBN) National Aesthetic Spa Network (NASNAPRO) National Association of Barber Boards National Coalition of Estheticians Association (NCEA) Professional Beauty Association (PBA) Professional Beauty Federation of California (PBFC) Pro Nails Association (PNA) Spa Industry Association (SIA)
--	--

MEET THE COALITION



Unite As One (UAO) is a collaborative effort among leading industry associations that began during the pandemic and continues today through regular meetings and aligned action. At the 2025 Beauty Changes Lives Roundtable, UAO participated with its own table to explore the role of technology from an association perspective.

Focused on collective impact, UAO is committed to sharing insights, coordinating advocacy efforts and combining resources to drive meaningful progress. Together, the group is championing four critical initiatives:

- **Tip Tax Reform**
- **License Reciprocity (Compact)**
- **Industry Recruitment and Retention**
- **Gainful Employment and Regulatory Challenges**

<https://beautychangeslives.org/uao/>



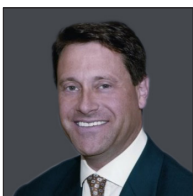
Pivot Point International is a third-generation, family-owned company dedicated exclusively to the professional beauty, barbering and wellness industry. Our team of licensed professionals brings extensive hands-on experience across beauty schools, salons, spas, barbershops, chains, brands and distributors.

As a founding member of Beauty Changes Lives and producer of the Industry Leader Roundtable, Pivot Point is committed to shaping the future of the beauty industry through charitable initiatives, recognition programs and cause-driven efforts focused on ethics, empowerment, inclusion and sustainability. Our original research explores critical topics affecting schools and professionals, including wellness, generational dynamics, post-pandemic education and the role of perception in industry recruitment and retention.

Pivot Point's education offering includes original and third-party curriculum for cosmetology, barbering, nails and esthetics—delivered through a learning platform built specifically for beauty professionals.

Pivot Point also manufactures the industry's most diverse range of top-quality mannequins, all produced in our company-owned, SA8000-certified factory to ensure the highest standards of ethics and craftsmanship. We offer a complete range of textured hair mannequins, and our eco-friendly Cap Series mannequins are designed for portability, space efficiency and reduced landfill waste.

www.pivot-point.com



Let's Connect

To explore how we can collaborate please contact: Steve Reiss

sreiss@pivot-point.com

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

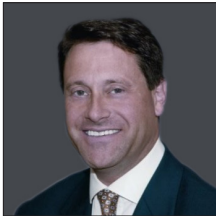
Whether your research is for internal intelligence or to support sales and marketing, we can help you explore all your research options. Knowing that quick turnaround is often a consideration, our industry relationships and experience help us provide you with the most time-effective solution.

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

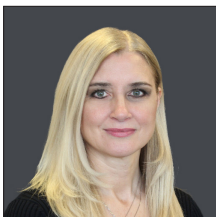
15+ years providing custom research solutions to leading beauty industry groups, with a focus on leveraging research insights to create effective strategies supporting business goals.



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.