

Barcelona Treball

Wellness and personal image

Sector Report 2013

With the collaboration of:
Cosmobelleza

Co-financed by:

The 10 keys to understanding the sector

The professionalisation of the industry and the global conception of wellbeing in physical and psychological aspects are the guidelines which mark the future evolution of this industry.

The sector

The wellness and personal image industry covers all of the services related to the improvement or modification of physical appearance, with the resulting impact that this has on physical and mental health. The industry thus includes services which not only have a direct effect on an improvement of people's physical condition, but also on an increase in their mental wellbeing, given that many of the activities which make up the industry are dedicated to personal care, such as relaxation services, low-intensity sport activities or alternative therapies.

Main areas of activity

In addition to aesthetic centres and hair salons, there is also a broad range of commercial services where the sector's products can be acquired. These include sports centres, spas, cosmetic medicine clinics, massage centres, perfume stores, beauty departments in companies delivering comprehensive personal image treatments, hospitals, geriatric centres, companies which provide funeral services and audiovisual, advertising and public relations companies.

Trends

The industry is moving towards higher requirements for professional specialisation due to their customers' requirements and market competition. In other words, customers demand very high levels of quality and responsibility since these services have a direct effect on their health. Similarly, industry establishments are tending to diversify their services, for example hair salons are offering more and more aesthetic services, and this will make it necessary to step up training requirements for professionals. Also, part of the offer and the services sector will specialize to the elderly in order to meet the specific demands of this group.

Economic importance

Spending on FMCG in perfumes and cosmetics fell by 0,9% in 2011 to stand at €3.253 million. Also, selective perfumery and cosmetics recorded a contraction of 2,6% (€1.524 million). In addition, the number of establishments engaged in providing sports services in 2011 was 16.827 in Spain and 2.872 in Catalonia. Finally, according to a sector study by DBK in December 2010, the turnover of hair salons and aesthetic centres was €3,55 billion in 2009 compared to €3,72 billion in 2008. Hair salons accounted for around 85% of the business at €2,99 billion in 2009. Aesthetic centres have expanded and had a turnover of €555 million.

Employment

Approximately 270.000 people worked in the industry in Spain in the third quarter of 2012, according to the Labour Force Survey (EPA). Thus, compared to the third quarter of 2011, there has been an increase of 7,02% of employment in some sector activities.

Professional profiles most in demand

In the wellness and personal image industry, there is a need for versatile professionals who are capable of carrying out varied and heterogeneous tasks. It is therefore imperative that those who wish to work in this industry have practical and theoretical knowledge in its different fields. Additionally, the intrinsic characteristics of the industry, which is continuously evolving (new beauty trends, new wellness treatments, new techniques for diversifying the target market, etc.), will oblige professional personnel to stay up-to-date at all times. What is more, customer care is becoming a key element in the quality of the services offered by the industry, so personal aptitudes and social abilities such as friendly treatment and the ability to empathise will be skills which these professionals will be obliged to master.

Occupations most in demand

The field of physical maintenance is one of those which offer the greatest possibilities for employment, mainly because this field requires many different and versatile professionals, for example yoga or Pilates instructors, personal trainers, beauty advisors, etc. In other words, they must be able to provide benefits in terms of beauty, health and physical and psychological wellbeing at the same time.

The field of hairdressing, despite being a mature activity, is another of the areas which generates the highest demand for professionals, except in this case it is very probable that the traditional occupations will have to adapt to new requirements, such as expanding knowledge about personal beauty treatments.

Future scenarios

The traditional concept of improving personal physical image has evolved towards a more global conception which is related to the improvement of personal health and wellness. In accordance with this premise, new professional personnel who join the beauty and personal image sector will have to offer quality services which will involve an improvement in customer care and health and hygiene conditions.

Weaknesses

The underground economy has traditionally been a part of this industry and this has harmed its image, leading to its discredit; for example, through the existence of unlicensed premises, unqualified people working in a profession, etc. It is because of this that industry representatives have repeatedly brought up the need for stricter regulation. As a result legislation is becoming more and more demanding, especially regarding treatments which involve a health risk.

Opportunities

The ever more universal access to personal image and wellness services, the increase in leisure culture, the importance attached to good health and the advent of new technologies are only some of the factors which show the great potential of the industry.

This, together with new demands from consumers, investment in technology and the growing demand for training as a means of surviving the crisis from professional personnel in the industry will foster the demand for professionals with training in the personal image field and will be an excellent starting point in the fight against the underground economy in the industry.

01 Introduction to the sector

The wellness and personal image industry covers all of the services related to the improvement or modification of physical appearance, with the resulting impact that this has on physical and mental health. Hence the industry includes the services which are offered at hairdressers and aesthetic centres, spas, cosmetic medicine clinics, massage centres, beauty departments in companies delivering comprehensive personal image treatments, hospitals, geriatric centres, companies which provide funeral services and audiovisual, advertising and public relations companies.

Consumer trends, which in recent years have made a strong turn towards services related to health and beauty, have significantly boosted the growth of the beauty industry. People's growing preoccupation with their physical appearance and the greater importance which is being given to personal wellbeing are two factors which have favoured this growth. In fact, according to the Spanish Association of Perfumery and Cosmetics (STANPA), the Spanish market for cosmetics products is the fifth most important, by volume, in the European Union. Additionally, in 2009 Spaniards spent more than €7 billion on cosmetics products, which is even higher than in 2005, a year of economic expansion.

The wellness and personal image industry is structured into three large fields of activity: beauty, hairdressing, make-up and body art (piercings and body decoration); personal wellness and alternative treatments, including treatments which improve people's physical and mental health; and sports activities, which are designed to improve people's physical condition by doing sport or low- or high-intensity physical exercise.

02

Main areas of activity

Beauty, hairdressing, makeup and body art

This field comprises the activities of beauty, hairdressing, makeup and body art. Although they are all part of the same area, a brief description of each of them should be included here.

Beauty refers to the procedures of facial and body cleaning and massages, hair removal, manual lymphatic draining and all the facial or body treatments which do not require the formulation of medicines or surgical intervention, amongst other activities reserved for medical professionals.

Hairdressing refers to image assessment and treatments related to changing the colour or the cut of hair, the implantation of artificial hair, styling and up-dos, capillary treatments, product testers, etc.

Makeup includes all of the professional activities whose aim is to apply makeup to people in different fields, such as television, cinema or advertising, but also to people who wish to be made up for a special event (such as a wedding) and the makeup applied to the deceased.

Body art refers to all of the techniques whose aim is to decorate the skin, either via pigment injected below the epidermis for permanent makeup or ringing it by making a small hole. It also includes micro-pigmentation techniques which, in addition to being a body art technique, are used to fill alopecia cells with pigment, colour the eyelids, diminish the appearance of scars, stains on the skin, or areolas after a mastectomy, etc.

Finally, within this group there are also image assessment services, which refer to any of the techniques for personal beautification, such as clothes styling, fashionable hair styles, makeup and its applications and complete body care, ranging from external procedures and microsurgery to more specialised medical treatments. It also covers the knowledge of social protocols and uses and the adaptation of one's personal conduct regarding verbal expression and body language.

Personal wellness and alternative treatments

This area of activity includes the treatments which are complementary and alternative to those in the previous area of beauty, hairdressing, makeup and body art. Throughout the 20th century, progressive social equality and the advent of the welfare society have popularised what is known as wellness, a collection of resources which help people to feel better about themselves, both physically/aesthetically and psychologically.

In this sense, a set of services has appeared the most prominent of which are offered at urban spas, with an array of therapies such as aromatherapy, vinotherapy, chocotherapy, fangotherapy and thermal therapies; massage, chiromassage and reflexotherapy centres; centres for relaxation therapies; and the establishments which use therapies designed to improve physical condition, such as homeopathy or naturopathy. These activities are in constant expansion and hotels or sport centres often provide these products as a complement to the other services they offer.

Sports activities

The field of sports activities includes all of the services designed to provide infrastructures and instruments for doing sport, such as gymnasiums, private clubs, rock climbing walls, sports centres and even the natural spaces in which adventure sports can be done. Additionally, this field also includes sports activities which can be carried out in schools or performing arts centres, such as traditional dances.

In recent years, people have acquired new sport habits which are directly related to their personal quality of life and wellness, and this has increased the public and private supply of installations and services, meaning there is a constant need for more professionals in the sector. This means that it is an industry with good employment opportunities.

Thus attaining good physical condition improves personal health and personal image and reduces stress. These factors are highly valued by people who normally participate in sport activities. The most popular sports are those which improve physical condition and are also fun and relaxing. This is the reason behind the constant appearance of new types of sports combined with traditional ones. For example, aerobics and step have given rise to a broad repertoire of possibilities such as fit ball, body combat, water aerobics, water spinning, body pump, spinning, aerobox or tae-bo, Pilates, Tai Chi and body balance.

03

Sector trends

Alternative treatments based on thermalism have emerged strongly in recent years, not only because of the advent of the wellness culture but also due to an increase in the supply of treatments at a price that most people can afford.

The global conception of wellness: body and mind

Wellness is a relatively recent concept that has its origins in fitness, which is an idea based on seeking good physical condition, and in aesthetics, which comes from the Greek word *aisthesis*, meaning “sensation”. Wellness comprises the concepts of fitness and aesthetics, and its objective is to attain physical and mental wellbeing at the same time.

The high pace of work, excessive workloads and carrying out monotonous tasks are factors which have increased people’s stress levels and their need to reduce them through doing specific activities. It is for this reason, amongst others, that activities which improve people’s physical and mental wellbeing have flourished in recent years, especially in alternative therapies and low-intensity sport activities.

Therapies include hydrothermalism, aromatherapy, chocotherapy and vinotherapy, while examples of sports activities are yoga, the Pilates method, Tai Chi and body balance.

Connection with healthcare

The wellness and personal image industry is increasingly linked to the health industry, given the evident benefits that carrying out the activities offered by the sector have on people’s health. An example of this is in the area of aesthetics, which has sufficient technology and human resources to make aesthetic changes in people who have been subjected to aggressive treatments for serious diseases, such as cancers. Indeed, a large part of R&D and innovation has been geared towards researching and manufacturing new tissues, specialised cosmetics, etc. which may entail new specialisation options and professional opportunities for profiles in the industry.

Furthermore, stress and anxiety are disorders which have increased considerably in recent years and everything would suggest that this trend is likely to continue. In fact, there are studies which indicate that between 15% and 20% of people will experience some type of anxiety disorder at some point in their lives. As a result, alternative therapies will emerge as a new complementary healthcare system for people who suffer from these types of diseases.

The growing importance of franchises

As has happened in other industries, the economic crisis is affecting small and independent establishments much more since their cost structures are less competitive than the large franchises. Because of this, the franchise format is proving to be relatively profitable for hairdressing firms (which in some cases have introduced low cost strategies) and especially for aesthetics companies (for instance enterprises in the laser hair removal sector). According to Mundofranquicia Consulting, in Spain there are 41 hairdressing, cosmetics and beauty franchises, and 27 more in aesthetics and personal care. These franchise chains are getting customers because of its flexibility and have significant capacity to adapt to different niches (different groups of consumers). This trend will continue in the future due to the benefits of the franchise in terms of working procedures and branding, and the opportunity to develop activities on their own.

Training, innovation and service diversification

The most recent Cosmabelleza survey, conducted in 2010, found that 70% of the more than 900 professionals surveyed in the fields of hairdressing, beauty and wellness said that, given the economic situation and the evolution of their businesses, they have stepped up their attendance at courses or have taken part in training activities in the previous year. However, the crisis has led to a fall in this figure which in the 2011 survey is down by 30%. Nonetheless, the sector is strongly committed to continuous professional development for its staff.

In addition to training, the survey also found that product and service innovation remains another option chosen by many professionals to weather the crisis and develop the industry. Three out of every four people surveyed stated that

they had introduced innovations in their businesses in 2010. In the Cosmobelleza survey for 2011 58% of companies said they bought equipment when there is a new product on the market that meets their needs.

These innovative measures mentioned in the Cosmobelleza survey include the introduction of new services in some establishments, such as in makeup, manicures and pedicures. Respondents also noted other types of measures, such as the use of special promotions or, in some cases, campaigns on social networks.

Active aging and consumption: impact on welfare

The increase in life expectancy and an interest in delaying the signs of ageing are two factors which have come together to make this into an emerging industry. The ageing of the population is making a major contribution to the proliferation of sport centres, and the figures for the elderly population seem to confirm this trend. In January 1st, 2012 there was 8.221.047 elderly in Spain (17,4% of the population), in the next 40 years, Spain will be the second aged country in the world. In 2050, 30% of Spaniards will be over 65 years old.

In fact, consumers in the elderly have specific needs conditioned by age and their ability to spend. People over 65 years old account for the 28% of consumption, therefore, according to the National Consumer Institute, the market for the elderly will become wider, and will move more public and private resources; the offer must include a varied repertoire and specialized products and services.

The medical community is increasingly recommending doing sport and in particular low-intensity activities which benefit both the body and the mind as they counteract pathologies especially in bones and joints which are common at this stage in life. It is also recommended that people who suffer from psychological illnesses, such as depression, do these types of activities. These illnesses appear in a significant number of people when they reach retirement age.

Another field in which older people will become the new target of the industry is spa therapy, in both urban and traditional thermal water spas. Indeed, the Social Security covers spa visits for the elderly in certain cases. These circumstances would suggest that there will shortly be a need for professionals with specific knowledge in this area.

Regarding these set of circumstances, in the short term, professionals able to perform specific actions to promote health in active aging will be needed. Professionals must expand or deepen their knowledge in this field of work and must specialize in nutrition and preventive medicine techniques, improve memory and concentration, activities to activate the sense of humor and positive thinking, techniques on body movements, specific fitness activities, etc.

Sport as an incentive in business

One of the current business trends is to invest financial and human resources in mapping out corporate social responsibility policies in organisations, not only because there is legislation which obliges companies to conform to certain social regulations, but also because there is evidence that improving staff working conditions increases their productivity, lowers stress and reduces absenteeism. Hence policies which companies are putting in place to reconcile work and family life include the provision of services such as sports, for instance through their own gyms; some large companies have gyms and encourage their employees to do sport. Hence it is quite possible that a new range of work opportunities will be opened up in the business world for professionals in the field of sport activities.

Male market as an opportunity for expanding the sector

The clientele of the sector has been and remains predominantly female at approximately 90% of the total. However, the importance placed on physical appearance and healthy living today has led to men using sector services as well, including massages, facial peels, going to spas and so on. In recent years men have begun to attach importance to these services for their personal wellbeing. Consequently, in addition to hair loss treatments the sector is also seeing an increase in purchases of male cosmetics and beauty treatments, for example facial creams, belly reduction creams, etc.

Innovation in the field of cosmetics

The wellbeing and personal image sector has experienced a decline in turnover and sales volume. However, this has not stopped it from opting for innovation and development. The sector is innovating in fields such as rejuvenation treatments that are a real alternative to cosmetic surgery, organic cosmetics which do not use petroleum products, pesticides or other pollutants, natural cosmetics and the increased use of plant ingredients in products, mineral cosmetics made from gemstone minerals, neurocosmetics to treat the effects on the skin of the nervous system, and wine cosmetics which use the remains of winemaking as ingredients.

Active aging: specialized source of goods and services

The number of retirees is growing; at the same time as the demand of many of these goods and services for personal image and wellness. Therefore all EU countries are making a major effort to address the needs of this group, which may encourage the revitalization of the sector.

04

The sector in figures

Economic data

- 94% of beauty professionals will reduce costs in their businesses in 2011, which is 25% more than those who raised this possibility in 2010.
- In 2011, 61% of beauty companies believe that they will have to invest in innovation to tackle the crisis. In fact, according to a 2010 Cosmobbelleza report on beauty treatment devices, 58% of companies buy equipment when there is a new product on the market that meets their needs.
- In 2011, 60% of sector professionals believe that the most viable way to expand services and increase sales is through agreements with other professionals.
- In 2010 there were 41 hairdressing, beauty and cosmetics franchises (according to the classification by Mundofranquicia Consulting), with another 27 more in aesthetics and personal care.
- The establishments which provide services in the industry have undergone a very positive evolution and increased by 25.55% between 2001 and 2007. In total, there are 85,281 establishments, the majority of which are hair salons. Many of them belong to commercial chains.
- The perfumes and cosmetics subsector had a turnover of €4.400 million, 1,3% more than in 2010.
- Yearly household spending on hairdressing and aesthetics in 2006 (latest data available) in Spain came to €342,52; in 2009 this amount was reduced to €317.33.
- A report by STANPA (Spanish Association of Perfumery and Cosmetics) carried out in 2010 found that per capita consumption of cosmetics products was €33 per year per person in perfumes and fragrances, €13 per person per year in decorative cosmetics, €41,40 per person per year in skin care, €34,50 per person per year for hair care and €34,10 per person per year for personal hygiene.
- The consumption on makeup decreased by 2.7% in 2011; fragrances down by 0,7%; skin care down by 2%; and hair care down by 1,7%. However, personal hygiene products maintain stable and rose by 0,1%.
- Spending on FMCG in perfumes and cosmetics fell by 0.9% in 2010 to stand at €3.253 million. Spending on selective perfumery and cosmetics also recorded a contraction of 2,6% compared to 2010, when stood at €1.524 million.
- The number of food stores and drugstore / perfumery decreases in 2011 (61.642 stores) in comparison to stores in 2010 (63.043 stores). In 2011 the number of establishments providing sports services stands at 16.827 in Spain and 2.872 in Catalonia, a figure which matches the number of companies, mostly gyms.
- According to a sector study by DBK in December 2010, the turnover of hair salons and aesthetic centres was €3.500 million in 2009. Hair salons accounted for around 85% of the business at €2.995 million in 2009 while aesthetic centres have expanded and had a turnover of €555 million.
- The number of companies engaged in sports activities in Spain in 2011 was 16.827; in Catalonia, 2.872. It should be noted that these companies include activities in sports clubs, gyms and other sports as classified in CNAE-2009 (latest data available).
- Catalonia spends more than Spain as a whole on hairdressing and aesthetics. In 2009, Catalan households spent €388,72, which is 22,5% more than the Spanish average; it is worth noting that in 2006 annual household spending in Catalonia came to €422.59.
- In 2007 the average price paid for an occasional service (average receipt), such as a hairdressing or beauty service, was €50. The latest Cosmobbelleza survey (2011) confirms a fall in the average receipt in beauty treatments, without quantifying it, as well as a lower number of customers and frequency of visits to the establishments.

Employment data

- In the third quarter of 2012, around 269.000 people were employed in the industry. This represents an increase over the third quarter of 2011, when there was 252.000 people employed.
- In 2011, 40% of sector professionals have done some kind of training. The equivalent figure in 2010 was 70%.
- In general, aesthetics and hairdressing companies employ few people per establishment. The average number of people employed by this type of establishments in 2011 was 2,5 for hairdressing and 2,8 for aesthetics, figures very close to the ones for 2007 (2,12 people). In many cases services which are auxiliary to the main one, such as beauty treatments in hair salons, are provided by external personnel who do not regularly work for the company.
- In 2009 franchises had higher employment levels per establishment than in previous years. Hairdressing, beauty and cosmetics establishments employed 3,65 people per establishment, while aesthetics and personal care establishments employed 4,44 people.
- According to a Stanpa (National Association of perfumes and cosmetics) report made in 2011, the sector of perfumery and cosmetics generates about 35.000 direct jobs and 50.000 indirect ones (hairdressers, pharmacies, small business, marketing, etc.).

Sources. Latest data available: INE – Annual Services Survey; INE – Family Budget Survey; 2010-2011 Cosmobbelleza survey; Mundofranquicia Consulting; *Consumer* magazine; DBK Sector study; Spanish Association of Perfumery and Cosmetics (STANPA).

05

Professional profiles most in demand

Most highly qualified professional profiles

Training profile

The more qualified professional profiles have a medium-level or higher vocational training certificate in the professional categories of personal image or physical and sport activities. There are various certifications in the industry, including advanced technician in image assessment, advanced technician in aesthetics, advanced technician in physical and sport activities, etc.

The professional personnel in the fields of hairdressing, aesthetics, makeup and body art, and wellness and alternative treatments must have knowledge of style, human anatomy, physiology, and pathology as applied to aesthetics, as well as a good command of the techniques of cosmetic electrosurgery, massage, hair removal, micro pigment implantation, communications and social uses, etc.

Regarding the field of physical activity, in addition to theoretical and practical knowledge about the functioning of the human body, professionals must have a good command of the techniques of encouraging and motivating people. Industry companies are obliged to hire personnel with the certification of advanced technician in physical and sport activities, which requires having a good command of these techniques.

Skills profile

In addition to having a good command of the style, makeup or sport techniques required to be employed in the industry, professionals in the industry must have developed competencies related to interpersonal communication skills, as the base of the industry is centred on offering wellness solutions to their customers. So it is necessary for professionals in the industry to have competencies such as customer care, kindness, empathy and good communication skills.

Furthermore, on many occasions those who work in the industry are enterprising people who have started a small business which has been maintained or which has expanded over time. These professionals need to have competencies in people management and teamwork. They must also possess, in particular, self-confidence, leadership skills and negotiation skills.

Finally, this is an industry in constant evolution. That is to say, new style trends, new treatment techniques, etc. continuously arise and hence industry professionals must have initiative, be creative and have a sense of the strategic orientation of the business.

Examples of jobs in the directory of Web Barcelona Treball

- ✓ [Micro pigmentation technician](#)
 - ✓ [Weight room instructor](#)
 - ✓ [Aesthetic massage therapist](#)
 - ✓ [Hydrothermal aesthetician](#)
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Less qualified professional profiles

Training profile

The training profile of the less qualified professionals corresponds with medium-level vocational training, such as medium-level technician in hairdressing, medium-level technician in decorative personal aesthetics, medium-level characterisation technician, etc. However, it is also possible to obtain professional certificates in the fields of personal image and physical and sport activities, defined and awarded by the Catalan Institute of Professional Qualifications.

With respect to the professionals in the areas of hairdressing, aesthetics, makeup and body art, and wellness and alternative treatments, the existing training imparts knowledge for applying the techniques of hairdressing, manicure and pedicure, personal decorative aesthetics, customer advice in their field of competency, personal characterisation, facial and body hygiene, makeup and knowledge of beauty tools and instruments.

Regarding the field of physical activity, the existing training imparts knowledge of guiding, lifesaving techniques, physical preparation in a weight room and carrying out swimming activities, amongst others.

Skills profile

For the less qualified professional profiles, the most significant skills which are required are those related to the field of personal relationships, such as empathy, customer care and inter-personal communications. Similarly, the professional success of these profiles will depend in large part on their level of commitment which they establish with the company where they work and their flexibility and ability to adapt to the changes which are occurring in the industry.

On the other hand, for these profiles it is not absolutely necessary to have leadership or personnel management skills, though possession of these competencies may enrich and add value to the company which employs them. Creativity, strategic orientation and initiative are aptitudes which are valuable to the professional development of these professionals.

Examples of jobs in the directory of web Barcelona Treball

- ✓ [Beauty advisor](#)
 - ✓ [Tattoo artist](#)
 - ✓ [Film and television makeup artist](#)
 - ✓ [On-set hairdresser](#)
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06

Future scenarios

Weaknesses

- Traditionally, the industry has been characterised by having a strong underground economy. In addition, many people have worked as professionals without any type of certification, which has led to the discredit of the industry and those who work in it. It is because of this that the organisations which represent the industry have repeatedly stated the need to reinforce the rules which regulate it and the procedures for getting a job.
- Chains, which are the companies that employ the majority of the professionals in the industry, have experienced strong growth. However, the number of people who work in an establishment still has a certain degree of fragmentation at only 2.12 on average, especially in hairdressing.
- There has been an increase in the number of hairdressing chains that have opted to transfer their brands as franchises, in addition to progressively increasing the number of their own establishments. The owners of small, non-franchised establishments may face difficulties in staying competitive with the franchised chains in terms of both costs and services offered.
- Although the early stages of the crisis in 2008 did not appear to have affected the industry, it has ultimately suffered a fall in activity. Average annual household spending in Catalonia in the sector fell by 4,9% in 2011 compared to 2010.

Threats

- The crisis has meant that some professionals have been left without a job. An immediate solution to this situation has been to continue to work in the same activity but in the black economy, which has led to unfair competition and quite probably a decline in service quality.
- The growth of the aesthetics industry depends, in large part, on the development of cutting-edge technologies and equipment which add value.
- The economic slowdown and the expansionist policies of the main chains in the industry will significantly increase the level of competition in the coming years.

Strengths

- The demand for aesthetics, hairdressing and beauty services and treatments is not as elastic as it may seem at first sight. The wellbeing provided to consumers of these services goes beyond their merely physical effects, and this means that spending on them continues to form a significant part of household budgets; 1.17% of Catalan household expenditure is allocated to these services and treatments.
- Beauty services have become an additional service which has brought added value to hairdressing businesses. The evolution of the aesthetics industry will continue to increase the offer of services which these establishments can provide and consequently the range of opportunities for industry professionals will be broadened.
- The use of technology in the industry has been consolidated and the majority of tools which are used for treatments are highly technology-intensive instruments. The machinery which is used in the industry, especially in the fields of aesthetics, hairdressing, makeup and body art, is very specific and is undergoing constant change.

Opportunities

- The welfare and care of personal image is an upward trend ever since there is a greater concern for physical appearance and personal wellbeing. This has led to a growth in the cosmetic industry and health. The Spanish market in these products is the fifth of the EU.
- The beauty and personal image industry is resisting the current crisis well and to do so is investing in innovation. The treatments with the greatest success in the market are manicure and makeup and facial care.
- The expansion of the main hairdressing and aesthetics brands (which can provide more competitive structure

costs) is encouraging, and will continue to encourage, an increase in franchised establishments and as a result an increase in the number of people employed in the industry, which will be an opportunity for those professionals who do not wish to join franchises.

- The main foreign chains may begin operating in the country as they have the financial solidity required for rapid expansion in new markets.
- Interest in physical appearance and delaying the signs of ageing has led to an expansion and diversification of the target market of aesthetics services; in fact, Spain is one of the countries to attach most importance to aesthetics. Furthermore, according to the Spanish Society for Reconstructive and Aesthetic Plastic Surgery, Spain is the leading country in the European Union (and the fifth in the world) in cosmetic surgery.
- The primary clientele of the industry is an adult woman between 30 and 55 years old. However, this is changing and in recent years new market segments have appeared in the shape of young people and men. Men currently account for 10% of total cosmetic procedures (3,5% of them are hair transplants) while another 10% of the operations which are carried out in Spain are for young people between 18 and 21 years old. In fact, Spain is the leading country in surgery for young people.
- Men have acquired new aesthetic habits, such as hair removal and other body treatments. Moreover, the high incidence of androgenic alopecia (around a third of men over 45 years old suffer from this) may generate a large part of capillary treatment activities, which have expanded to the detriment of treatments using false hair. The profile of men's hairdressing specialist thus has fairly positive future employment prospects.
- In addition to hair treatments, the specific aesthetic and personal image needs of men need to be researched in order to reach a wider market and generate more profits and employment.
- Today people live longer and better, and participate actively in society for more time. So, the elderly are an ever growing segment which is more inclined to spend money and time on caring for their health and personal image. Part of the new generation of retirees begins to enjoy the pension plans that were created in the 70's and 80's; thus, they have spending capability.
- Tourist activities of the elderly focuses on the activities that improve health, for example, visits to spas, hiking outdoors ... The collaboration between welfare and personal image industry with other sectors like tourism industry, will be key to benefit of sector opportunities.
- External factors such as fashion, leisure and new technologies are driving and will continue to drive the industry. Hence keeping up-to-date with new trends in fashion, clothing, young people's leisure preferences, etc., will be essential in order to deliver quality service, meet customer expectations and bring value to products.
- The advent of high-definition (HD) television has placed new demands on makeup artists who need to reduce the appearance of skin imperfections that HD reveals to viewers. Consequently how the evolution of new technology affects the sector must be carefully monitored. The same thing may occur in the tattoo industry when new pigments with special properties emerge.
- Alternative treatments and sports activities designed to balance body and mind, such as yoga and Tai Chi, have great possibilities for expansion. This is so firstly because healthcare professionals recommend doing these activities and secondly because people are aware of the obvious benefits which they bring.
- The big beauty brands have joined to the concept of "green mode" because they have realized that environmental protection is a requirement of the consumers, and therefore add value to the brand. The evolution of "green mode" will increase the range of services and expand the opportunities for professionals.
- Children are increasingly affected by problems related to being overweight and the risk involved in leading a sedentary lifestyle. As a result doctors recommend that children should do sport, which may bring with it new models for sport activity for this segment of the population.

07

Useful links

International organisations

International Medical Wellness Association Advisors
<http://www.medicalwellnessassociation.com>

International Federation of Health & Beauty Therapists
<http://www.fht.org.uk>

Spanish organisations

Spanish Association of Makeup and Image Artists (AEMI)
<http://www.aemi.es>

Spanish Association of Perfumery and Cosmetics (STANPA)
<http://www.stanpa.es/>

National Business Confederation of Hairdressing and Aesthetics Educational Centres and Professionals
<http://www.cneceppe.es>

Barcelona Province Association of Women's Hairdressers
<http://www.gapsbcn.cat/>

International events (fairs, conferences, etc.)

Beauty forum website
www.beauty-forum.com.pl

Beauty UK website
www.beautyserve.com/Events/BeautyUK

Cosmética Berlin
www.ki-online.de/index.php?id=cosmetica_berlin

Hair & Beauty
www.hairandbeauty-fair.de

Salon International
<http://www.salonexhibitions.co.uk/>

Spanish events (fairs, conferences, etc.)

Health and Beauty Fairs
<http://www.fermasa.org>

1st Fitness and Health Congress
<http://www.valgo.es>

Expobelleza Andalucía
www.expobellezandalucia.com

Termatalia
<http://www.termatalia.com>

Cosmobelleza & Wellness
<http://www.cosmobelleza.com/es/feria.cosmo>

International Congress on Sports Management and Marketing
<http://www.gedo-formacion.com>

Spanish themed portals

Cosmobelleza
<http://www.cosmobelleza.com>

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