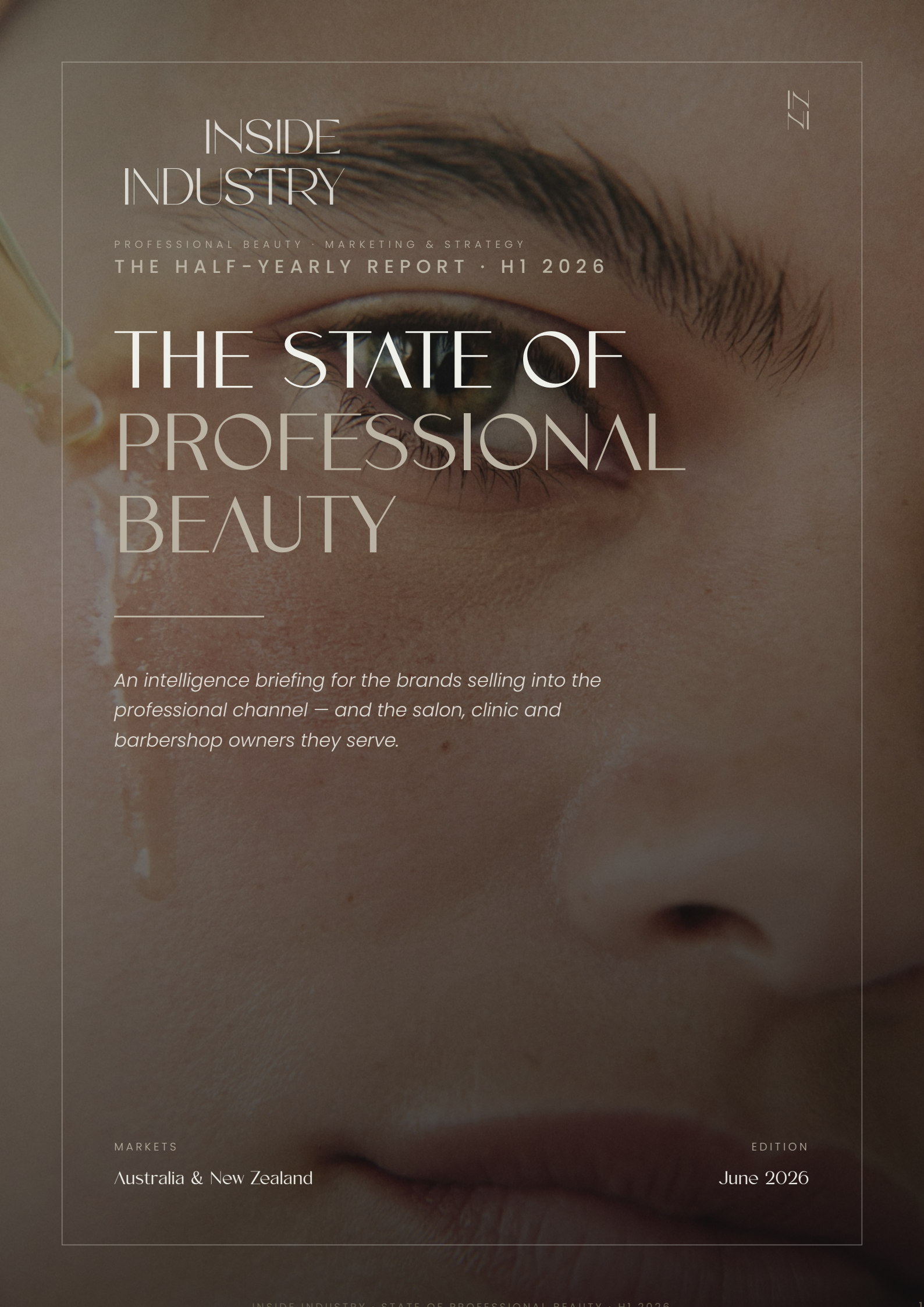




INSIDE
INDUSTRY

PROFESSIONAL BEAUTY · MARKETING & STRATEGY

THE HALF-YEARLY REPORT · H1 2026

THE STATE OF PROFESSIONAL BEAUTY

An intelligence briefing for the brands selling into the professional channel — and the salon, clinic and barbershop owners they serve.

MARKETS

Australia & New Zealand

EDITION

June 2026

FROM THE DESK OF INSIDE INDUSTRY

THE HALF-YEAR, IN ONE PARAGRAPH

The professional beauty industry in Australia and New Zealand is not shrinking — but it is being redistributed. Total Australian hairdressing and beauty services revenue sits at roughly **\$12.4 billion**, yet IBISWorld forecasts a 0.3% dip for 2025–26 as households pull back on premium treatments. Meanwhile the number of businesses competing for that pool has grown nearly six per cent a year since 2020 — to over 40,000 — driven by the solo-operator and salon-suite boom. Clients haven't abandoned beauty; they've become ruthless editors of it. The winners this half-year are the operators and brands that understood the difference.

“CLIENTS HAVEN'T ABANDONED BEAUTY. THEY'VE BECOME RUTHLESS EDITORS OF IT.”

This report reads the half-year across seven fronts — the market, salon business conditions, channel shifts, categories, technology, regulation, and the capital flows reshaping who owns the industry. Every statutory and company-reported figure is sourced to a primary record; commercial forecasts are flagged as estimates. Each section closes with a plain reading of what it means on both sides of the counter: for the brand selling in, and for the operator behind the chair.

\$12.4B

AU HAIR & BEAUTY SERVICES REVENUE,
2025–26

40,346

AU BUSINESSES, UP ~5.9% P.A. SINCE
2020

80.6

CONSUMER SENTIMENT, JUNE 2026 —
NEAR 50-YR LOW

INSIDE THIS EDITION

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01

THE MARKET

FLAT REVENUE,
MORE MOUTHS AT THE
TABLE

Beauty isn't contracting — it's redistributing. The pool is barely moving while the number of hands reaching into it grows faster every year.

FLAT REVENUE, MORE MOUTHS AT THE TABLE



Australia

The hairdressing and beauty services industry is worth approximately **A\$12.4 billion in 2025–26**, having grown at an annualised rate of just 1.7% over the past five years. IBISWorld forecasts revenue to **dip 0.3% this financial year**, attributing the decline specifically to reduced spending on premium treatments under household budget pressure. The more striking number is business count: **40,346 businesses**, up at a 5.9% annual clip since 2020. Business numbers have grown roughly three times faster than revenue. Every operator is, on average, fighting for a smaller slice.

New Zealand

The picture is tougher. The NZ industry is worth **NZ\$1.6 billion** and has actually *contracted* at an annualised 0.3% over five years, with a further small decline forecast for 2025–26. IBISWorld reports declining discretionary income has produced reduced visit frequency, lower rebooking rates and increased cancellations — clients delaying or skipping nails, skincare and hair removal first. The silver lining: revenue is forecast to recover at ~2.1% annually through 2030–31 to NZ\$1.8 billion as discretionary income rebuilds. NZ company liquidations hit an 11-year high in 2025, and the "other services" category that includes hairdressing recorded 174 liquidations in the year to March 2026, up roughly 40%.

The weakest consumer backdrop in a generation

The Westpac–Melbourne Institute Consumer Sentiment Index fell to **80.6 in June 2026** — among the weakest reads in the survey's fifty-year history, with pessimists outnumbering optimists by nearly 20% and the family-finances sub-indices dropping sharply. ABS household spending is still growing in nominal terms (+4.9% year-on-year in April 2026), but growth is narrowest in discretionary categories.

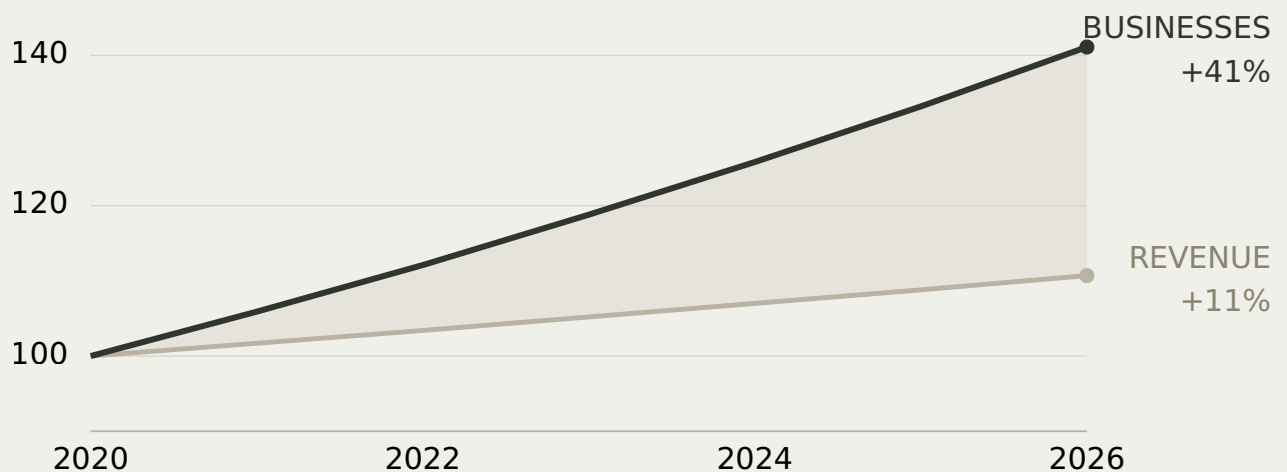
“PRODUCTS KEEP GROWING WHILE SERVICES FLATTEN. THE CONSUMER UNDER PRESSURE DOESN'T QUIT BEAUTY — SHE TRADES THE FORMAT.”

And yet the lipstick effect is real

Beauty *products* keep growing — the Australian beauty and personal care market is forecast to grow ~5.6% in 2026 — even as *services* flatten. Consumers under pressure don't quit beauty; they trade the format. They stretch the colour appointment and buy the bond-repair masque. This divergence between products (+5–6%) and professional services (–0.3%) is the single most important number pair in this report.

FIGURE 1 · THE SQUEEZE, VISUALISED

MORE OPERATORS, NOT MORE MARKET



AU hairdressing & beauty services, indexed to 2020 = 100. Business count compounding at ~5.9% p.a. against revenue at ~1.7% p.a. Derived from IBISWorld annualised growth rates.

WHAT IT MEANS

FOR BRANDS

the growth is in what clients take home, not just what's done in the chair. Salon retail and hybrid channel strategies matter more than ever.

FOR SALON OWNERS

your client hasn't left — she's editing. Win the edit by being the appointment she keeps and the products she trusts.

02

SALON BUSINESS CONDITIONS

THE COST SQUEEZE GETS A SEQUEL

If FY25 was about absorbing costs, FY27 is already booked in as another round — and it lands on the same date as a payroll revolution.

THE COST SQUEEZE GETS A SEQUEL

If FY25 was about absorbing costs, FY27 is already booked in as another round.

\$		↑
4.75%	1 JUL	10–25%
AWARD WAGE RISE, FROM 1 JULY 2026	PAYDAY SUPER BEGINS, 2026	PRODUCT COST RISE VS 3 YEARS AGO

Wages

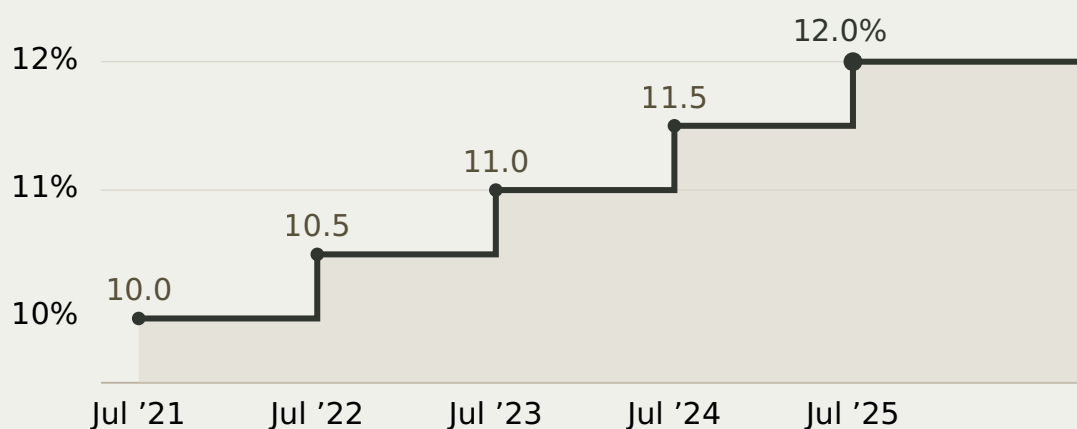
The Fair Work Commission's 2025 Annual Wage Review lifted the Hair and Beauty Industry Award 3.5% from 1 July 2025. On 2 June 2026 the Commission announced the next instalment: a **4.75% increase to award rates from the first full pay period on or after 1 July 2026**, taking the national minimum wage to \$26.44/hour (\$1,004.90/week). For award-reliant salon teams, that is two above-inflation increases back to back. In New Zealand, the adult minimum wage rose to \$23.50/hour in April 2025 and \$23.95 from April 2026.

Payday super lands 1 July 2026

Australia's superannuation guarantee reached its final step of 12% in July 2025, and from **1 July 2026 super must be paid every payday** rather than quarterly — a genuine cash-flow change for small salons used to holding super until quarter-end. The ATO's Small Business Superannuation Clearing House closes fully on 30 June 2026. Add the wage-theft criminal offence (in force since January 2025) and the right to disconnect now extended to small businesses, and payroll compliance has quietly become a board-level issue for a three-chair salon.

FIGURE 3 • THE COST RATCHET

SUPER STEPPED UP — AND STAYS UP



Superannuation guarantee rate, reaching its legislated 12% ceiling on 1 July 2025. Stacked on top for FY27: a 4.75% award wage rise and payday-super (both 1 July 2026). None of these steps reverse.

Costs and pricing

The Australian Beauty Association estimates premium professional product costs are 10–25% higher than three years ago, with energy and insurance also climbing. Salons are passing some of it on — hairdressing and personal grooming services CPI rose 3.6% in the year to February 2026 — but many operators still haven't repriced in over a year, effectively funding their clients' cost-of-living relief out of their own margin.

Labour remains the binding constraint

Hairdressers and beauty therapists both sit on Jobs and Skills Australia's occupation shortage list, and both are now on the **Core Skills Occupation List**, opening the Skills in Demand visa and a permanent-residency pathway — a meaningful win after years of industry advocacy. Hairdressing apprenticeship completion rates still hover around 40%, and national apprenticeship commencements fell again in 2024–25. The talent pipeline is structurally undersized.

The structural story: fragmentation

The fastest-growing "competitor" isn't a chain — it's the former senior stylist who now rents a chair or a suite. Business counts growing at 5.9% annually against flat revenue tells you exactly where employees are going. Salon-suite operators and chair-rental models continue expanding, and in NZ, IBISWorld flags rent-a-chair and home/mobile setups as actively intensifying competition while chains consolidate the value end.

WHAT IT MEANS

FOR BRANDS

your buyer base is splintering into thousands of micro-accounts. Distribution, education and minimum-order models built for six-chair salons don't fit a one-person suite. The brands winning the solo segment have rebuilt for it.

FOR SALON OWNERS

cost the 1 July 2026 wage increase and payday super into your pricing *now*, not in August. A salon that hasn't repriced since early 2025 is absorbing roughly two years of compounding cost growth.

03

CHANNEL SHIFTS

SALON EXCLUSIVITY IS
OVER —
WHAT REPLACES IT?

The professional brands you once had to visit a salon to buy are a click away. What remains is advantage, not exclusivity — and it has to be earned.

03 • CHANNEL SHIFTS

SALON EXCLUSIVITY IS OVER — WHAT REPLACES IT?



36%

BEAUTY SALES ONLINE, 2026 (FORECAST)



6–7%

SALON RETAIL SHARE — BEST HIT 20%+



\$213M

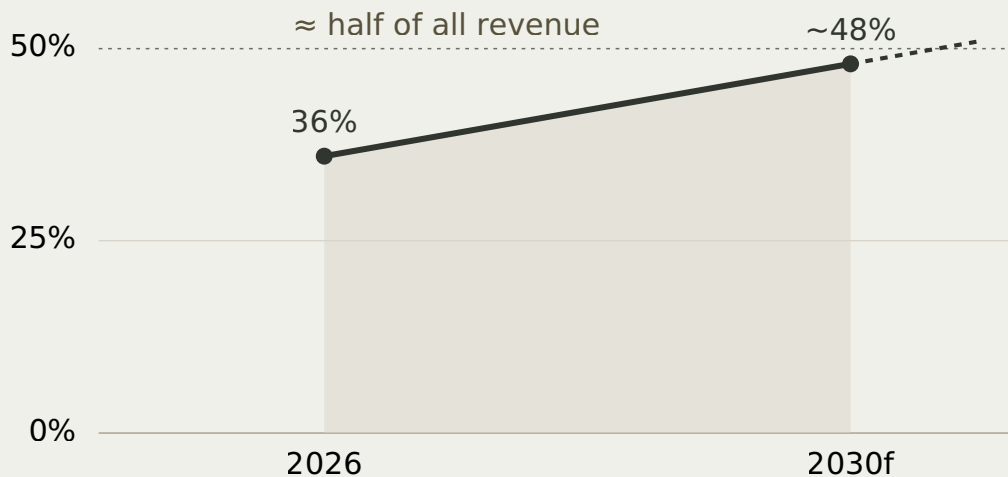
ENDOTA SALES, 110 SPAS — NOW FOR SALE

Online keeps taking share

Roughly **36% of Australian beauty and personal care revenue is forecast to flow through online channels in 2026**, on track toward nearly half by the end of the decade. Amazon Australia launched a dedicated "Beauty Finds" storefront, Adore Beauty grew H1 FY26 revenue 8.7% (about double market growth) while opening physical stores toward a 25+ store target, and Oz Hair & Beauty — built on professional haircare — passed A\$100 million in revenue with an aggressive bricks-and-clicks rollout.

FIGURE 2 • WHERE THE REVENUE IS GOING

ONLINE'S MARCH TOWARD HALF



Share of AU beauty & personal care revenue transacted online. 2026 is the IBISWorld forecast (~36%); the trajectory toward roughly half by decade-end is the report's read of current channel momentum.

Professional brands are openly omnichannel

In haircare, Kérastase, Olaplex, Davines, Oribe and Australia's own ELEVEN and O&M are all now sold through official non-salon online channels — and professional skincare has followed the same path, with Dermalogica, Medik8, SkinCeuticals and Simka available well beyond the treatment room. The era of true salon and clinic exclusivity has ended; what remains is professional *advantage* — diagnosis, personalisation, and trust — which has to be actively merchandised rather than assumed.

“SALON EXCLUSIVITY IS OVER. SALON ADVANTAGE ISN'T — BUT IT NOW HAS TO BE EARNED, NOT ASSUMED.”

Franchise and clinic networks are churning owners

The corporate end of the services market spent the half-year in play. KKR has been seeking an exit from **Laser Clinics (LCA/LCANZ)**, the largest player in the entire industry — sale talks at a A\$1 billion-plus valuation were reported in early 2025, though no deal is confirmed at publication. **SILK Laser** (~140 clinics under Wesfarmers Health) showed signs of rationalisation with abrupt closures in late 2025. And **endota** — Australia's biggest day-spa network at 110 spas and \$213 million in sales — is officially on the market via Canterbury Partners at a hoped-for mid-\$200 million price. Tellingly, endota is pitched not as a spa chain but as a “wellness ecosystem”: treatments, skincare retail, e-commerce, a gift-card engine (\$75 million in FY25), 500+ corporate partnerships, a training college and digital subscriptions. Diversified revenue, not chair time, is what's being sold for a quarter of a billion dollars.

Salon retail is the under-used lever

Industry-average retail share of salon and clinic revenue sits around **6–7%**, while top-performing clinics achieve 20%+. With services demand flat and product demand growing, that gap is the clearest untapped margin in the industry. Notably, solo operators outperform commercial salons on retail sales per client — intimacy sells product.

Prestige retail is consolidating around Mecca

Mecca posted record revenue of ~A\$1.43 billion for 2025 and opened its A\$50 million, 4,000sqm Bourke Street flagship — the world's largest beauty store — in August 2025. In New Zealand, Sephora posted its fifth consecutive annual loss (NZ\$5.3m on declining revenue) while Mecca NZ kept growing. For brands, Mecca's gatekeeper position in ANZ prestige has rarely been stronger — see Rhode's and Phlur's Mecca-exclusive ANZ launches this half.

WHAT IT MEANS

FOR BRANDS

diversion and grey-market product remains a live brand-equity risk as marketplaces grow — Amazon disclosed over 15 million counterfeit products seized globally in 2025. Channel governance is now a marketing function, not just legal's problem.

FOR SALON OWNERS

you will not out-discount Adore or Amazon. You can out-diagnose them. Prescriptive retail — recommended in the chair, linked to the service result, replenished via your booking platform — is where the 6–7% becomes 15%.

04

CATEGORIES

WHERE THE DEMAND ACTUALLY IS

Less but better in colour; clinical actives in skin; nails quietly healthy; injectables still the engine — now with a compliance tax attached.

WHERE THE DEMAND ACTUALLY IS

 US\$3B AU SKINCARE MARKET, 2025	 +8% MED-AESTHETICS GROWTH P.A. TO 2034	 A\$1.9B NAILS & WAXING, +2.3% THIS YEAR
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Hair colour

The 2026 colour story is *less, but better*: grey blending rather than full coverage, lived-in colour, low-maintenance balayage. Commercially this cuts both ways — it stretches visit intervals (pressuring frequency) but supports premium per-visit pricing and demands genuine technical skill, which protects salons from the at-home colour kits narrowing the gap at the value end.

Skincare, dermal and cosmeceuticals

The strongest structural growth in the services market. Australia's skincare market (~US\$3 billion in 2025) is shifting decisively toward clinical actives and dermatology-backed brands, and the medical-aesthetics services market is forecast to grow ~8% annually to 2034, with skin treatment categories (rejuvenation, tightening, pigmentation) forecasting double-digit growth in 2026. Clinic-channel distribution is expanding, with international medical-aesthetic skincare brands entering AU/NZ via practitioner-led channels through 2025.

Nails and waxing

Quietly one of the healthiest segments: an A\$1.9 billion industry in 2025–26, growing ~2.3% this year, with nails forecast as the fastest-growing salon service category and nail art the fastest-growing sub-segment. Affordable-luxury dynamics work *for* this category.

Lashes and brows

Demand continues shifting toward natural-enhancement services — lash lifts, brow lamination — over heavy extensions. A data gap worth naming: there is no robust AU-specific market sizing for this category; global proxies suggest mid-single-digit to ~8% growth.

Injectables-adjacent

Still the industry's growth engine — AHPRA itself calls it a "booming billion-dollar industry," and Laser Clinics Australia is the single largest player in the entire hairdressing and beauty services industry — but it is now also the most heavily re-regulated segment (see Section 06). Growth with a compliance tax attached.

Men's grooming

A structural growth pocket on both sides of the Tasman: barbershops are the fastest-rising segment of the NZ industry, and premium barbering continues expanding in Australia.

“COLOUR IS GOING LESS-BUT-BETTER. SKIN IS GOING CLINICAL. THE COMMON THREAD IS EXPERTISE THE SHELF CAN'T REPLICATE.”

05

TECHNOLOGY

THE YEAR AI
GOT A FRONT DESK

The booking platform became the industry's operating system — and, increasingly, its receptionist, marketer and data layer.

THE YEAR AI GOT A FRONT DESK



43%

BEAUTY LEADERS ALREADY USING AI



US\$80M

FRESHA RAISE — US\$1B+ VALUATION



82%

SAY SOCIAL MEDIA DRIVES SALES

The booking-platform landscape moved

Fresha raised US\$80 million from KKR in May 2026 at a US\$1 billion+ valuation — beauty tech's newest unicorn, with a strong Australasian footprint. Notably, Fresha also shifted from its famous free model to **paid subscriptions in 2025**, layered on its 20% new-client marketplace commission: a repricing of the whole "free software" promise that many salons built on. Timely (EverCommerce) and NZ's Kitomba remain stable fixtures; Zenoti launched a full "AI workforce" (receptionist, concierge, lead-manager agents) in late 2025; and Phorest rolled out **FrontDesk AI** — an SMS/WhatsApp agent that books, reschedules and answers queries automatically — to Australia in February 2026.

AI adoption is mainstream, not experimental

Square's Australian research found **43% of beauty leaders already use AI to analyse their business**, 45% automate email marketing and 43% are testing AI-generated social content. The missed-call problem AI receptionists solve is real: a large share of booking demand arrives outside opening hours, and solo operators physically can't answer the phone mid-service.

TikTok Shop has *not* launched in Australia

Despite persistent rumours of a late-2025 arrival, TikTok ANZ confirmed in March 2026 there are no local rollout plans — the blocker is logistics and seller infrastructure, not demand. Australian brands like HiSmile are instead selling cross-border into the US and UK TikTok Shops with spectacular results. For now, social commerce in ANZ still means social *discovery* converting through your own booking and e-commerce funnels: 82% of Australian beauty leaders say Instagram and TikTok play a major role in driving sales — while 63% of consumers still prefer hearing from beauty businesses by email.

Payments

Around a third of Australian beauty consumers find BNPL convenient for beauty services (skewing Gen Z and millennial), and 89% of beauty leaders say digital payments smooth checkout. Deposits of 20–50% at booking, with 24–48 hour cancellation windows, are now standard defensive practice against no-shows.

WHAT IT MEANS

FOR BRANDS

the platforms (Fresha, Phorest, Timely, Zenoti) are becoming the operating system of the industry — and increasingly its marketing channel and data layer. Brand strategies that integrate with salon software will compound; those that ignore it won't.

FOR SALON OWNERS

if 43% of your competitors are using AI to analyse their numbers and answer their phones, the question is no longer *whether* but *which tools first*. Start with the leak: missed calls and no-shows.

06

REGULATION WATCH

THE COMPLIANCE HALF-YEAR

The most consequential six-to-twelve months for beauty regulation in ANZ in a decade — and compliance has quietly become a competitive moat.

THE COMPLIANCE HALF-YEAR

This was the most consequential six-to-twelve months for beauty regulation in ANZ in a decade.



13,500

UNLAWFUL ADS THE TGA PULLED IN A YEAR



16/20

SPF50+ SUNSCREENS FAILED CLAIMS



\$16.5M

MAX CORPORATE ADVERTISING PENALTY

AHPRA's cosmetic-procedure reset (Australia)

New guidelines for non-surgical cosmetic procedures took effect **2 September 2025**: registered nurses now need a minimum one year of full-time post-registration practice before performing cosmetic procedures; every injectable prescription requires a live (in-person or video) consultation — asynchronous text/email scripts are banned; advertising rules prohibit targeting under-18s (with a mandatory 7-day cooling-off period for them), and liability extends to marketing agencies and paid influencers.

TGA advertising enforcement escalated

Guidance updated in 2025 bans indirect references to prescription injectables in advertising — brand names, nicknames ("tox", "baby botox"), hashtags and price promotion. Updated social-media guidance (November 2025) makes advertisers responsible for all historical posts, with each day a breach remains live a potential fresh contravention. The TGA requested removal of roughly 13,500 unlawful ads in the last financial year. Penalties run to \$16.5 million for corporations. If your clinic's Instagram grid predates September 2025, it needs an audit.

The sunscreen reckoning

CHOICE's June 2025 testing found 16 of 20 SPF50+ sunscreens failed their label claims, triggering the Ultra Violette Lean Screen recall, a TGA review of multiple products sharing the same base formulation, and a comprehensive review of SPF testing requirements — plus proposed restrictions on homosalate and oxybenzone under consultation in 2026. The fallout reached the services side too: endota had two of its branded sunscreens placed on hold and retested after its supplier was named in the investigation — mid-sale-process. Any brand with SPF in its range should treat substantiation as a live regulatory exposure.

New Zealand rewrote its cosmetics rulebook

The EPA's updated Cosmetic Products Group Standard applies to all cosmetics imported or manufactured from **1 January 2026** (sell-through of non-compliant stock until January 2027), with ingredient schedules broadly EU-aligned, mandatory IFRA fragrance compliance, nanomaterial labelling, and a phased **PFAS ban** from 2027. Brands exporting to NZ need ingredient-by-ingredient review now. Meanwhile, in a deregulatory move, NZ revoked its 45-year-old hairdresser premises regulations in July 2025 – no more council licensing fees, saving the industry an estimated NZ\$1 million+ a year.

Watch list

The EU banned the gel-polish photoinitiator TPO from September 2025; it remains legal in AU/NZ but EU-aligned reformulation is already flowing into local supply, and NZ's new EU-aligned schedules make follow-on likely. NSW Health is expected to tighten injectables regulation further, with new rules anticipated late 2026.

WHAT IT MEANS

FOR BRANDS

compliance is now a competitive moat. Brands that hand their salon and clinic partners ready-made compliant claims, advertising guardrails and reformulation roadmaps will be chosen over those that leave partners exposed.

FOR SALON & CLINIC OWNERS

three dates: your historical social content (audit now), 1 July 2026 (wages + payday super), and for NZ stockists, 1 January 2027 (sell-through deadline for non-compliant product).

07

CAPITAL & CONSOLIDATION

PROFESSIONAL BEAUTY
IS IN PLAY

Global capital spent the half-year buying the professional channel. Expect better-funded competitors and a fresh benchmark for what these businesses are worth.

PROFESSIONAL BEAUTY IS IN PLAY

Y	\$	✦
US\$1B	US\$750M	€1B
COLOR WOW TO L'ORÉAL	WELLA STAKE TO KKR — IPO NEXT	MEDIK8 MAJORITY TO L'ORÉAL

L'Oréal acquired **Color Wow** (completed September 2025, reportedly ~US\$1 billion) for its Professional Products Division and took a majority stake in clinic-skincare brand **Medik8** (~€1 billion) — both brands with significant ANZ professional footprints. Coty sold its remaining 25.8% of **Wella Company** (Wella Professionals, ghd, OPI, Clairol) to KKR for US\$750 million in December 2025, and KKR is now preparing Wella for a **US IPO** — a listing that will put public-market numbers on professional hair for the first time in years. e.l.f. bought Rhode for US\$1 billion; Ulta acquired Space NK; L'Oréal struck its ~€4 billion Kering Beauté deal.

Closer to home, the franchise-network churn covered in Section 03 — Laser Clinics, SILK, endota — sits alongside Mecca opening the world's biggest beauty store and Adore Beauty staying independent while pivoting hard to omnichannel.

“THE PROFESSIONAL CHANNEL IS BEING VALUED, CONSOLIDATED AND CAPITALISED GLOBALLY. IF THE WELLA IPO LANDS, THE INDUSTRY GETS A FRESH BENCHMARK FOR WHAT IT'S WORTH.”

The signal for ANZ: expect better-funded brand competitors, more distributor pressure, and — if the Wella IPO lands — a public-market yardstick for professional beauty valuations that didn't exist before.

WHAT TO DO WITH ALL THIS

IF YOU'RE A BRAND SELLING INTO THE PROFESSIONAL CHANNEL

- 1. Build for the solo economy.** Re-cut your MOQs, education and rep model for one-person businesses — that's where your buyer growth is.
- 2. Treat salon software as a channel.** Integration with booking platforms is the new shelf placement.
- 3. Make compliance a sales asset.** Compliant claims libraries and NZ Group Standard readiness will win you stockists in 2026–27.
- 4. Police your channel.** Diversion erodes the professional story you're charging a premium for.
- 5. Back the chair, win the basket.** Services may be flat, but salon-recommended retail rides the product market's 5–6% growth.

IF YOU OWN A SALON, CLINIC OR BARBERSHOP

- 1. Reprice before 1 July.** A 4.75% award increase plus payday super is not absorbable on a 2025 price list.
- 2. Defend frequency with memberships and rebooking,** not discounts — selectivity, not abandonment, is the client behaviour you're fighting.
- 3. Grow retail from 7% toward 15%+** with prescriptive, service-linked recommendations and replenishment.
- 4. Deploy AI on the leaks first:** missed calls, after-hours enquiries, no-shows (deposits of 20–50% are now standard).
- 5. Audit your social media** against the AHPRA/TGA rules — including everything you posted before September 2025.

“STOP GUESSING FROM THE OUTSIDE. LET US ACCELERATE YOUR BRAND — INSIDE INDUSTRY.”

MADE FROM INSIDE THE INDUSTRY

A report like this is the kind of thinking we do every day — we just made this one public.

Inside Industry is a marketing and strategy team for the professional hair and beauty world: the brands selling into salons and clinics, the educators who train the people using their products, and the distributors who supply them. We're an all-female team of nine, led by Tamara Reid, who has spent twenty years inside this industry. We work from Melbourne with clients around the world.

We've worked with more than forty brands and educators — skincare founders moving from direct-to-consumer into professional wholesale, clinical brands building stockist advocacy, and education businesses taking a course global. Most of what we do comes down to three things: helping a brand become known, helping it win stockists, and helping it turn those stockists into advocates. How we do that depends on where you are.

20

YEARS INSIDE PROFESSIONAL BEAUTY

9

ALL-FEMALE TEAM

40+

BRANDS & EDUCATORS WORKED WITH

THREE WAYS TO WORK WITH US

01 Strategy, on call

A conversation and a written plan you take away and run yourself. For founders who want clarity and a direction more than another pair of hands.

02 An advisor in your corner

Tamara as your strategic sounding board across a few months — regular calls, industry context, and decisions made with someone who has seen them play out before.

03 The team, building alongside you

When you would rather it got done. We act as part of your business and execute the work — the strategy, the content, the systems.

If reading this raised a question about your own brand, that's usually where we start. No pitch — just a conversation.

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METHOD & SOURCES

HOW THIS REPORT WAS BUILT

This report draws on industry and government sources published July 2025 – June 2026, including IBISWorld industry reports (AU S9511, Sept 2025; NZ S9511NZ, July 2025), the Fair Work Commission Annual Wage Review 2026 decision, Westpac–Melbourne Institute Consumer Sentiment (June 2026), ABS household spending and CPI releases, Jobs and Skills Australia occupation data, AHPRA and TGA guidelines and media releases, NZ EPA and MBIE announcements, Stats NZ, Square's Future of Beauty Australian research, company filings, AFR Street Talk and verified trade press. Where figures come from commercial market-research forecasts (Mordor Intelligence, IMARC, Statista, Grand View) or vendor research, they are presented as estimates.

Several figures could not be independently verified and were excluded, including salon-specific insolvency counts (no ASIC series exists), AU-specific professional-haircare diversion volumes, and lash/brow market sizing for Australia. Figures marked as forecasts reflect the latest available data at publication and should be re-checked against primary sources before external quotation.

SELECTED SOURCES

IBISWorld — AU Hairdressing & Beauty Services · NZ Hairdressing & Beauty Services · AU Waxing & Nail Salons | Fair Work Ombudsman — Annual Wage Review 2026 | Westpac IQ — Consumer Sentiment, June 2026 | ABS — CPI, February 2026 | AHPRA — Cosmetic procedure guidelines | TGA — Social media advertising guidance · Sunscreen recall | NZ EPA cosmetics overhaul (via CosmeticsDesign-Asia) · CIRS | NZ hairdressing deregulation | ATO — Payday Super | Square AU — Future of Beauty | Fresha / KKR raise | TikTok Shop AU status | Coty–Wella / KKR | L'Oréal–Color Wow · L'Oréal–Medik8 | Mecca record revenue | Sephora NZ losses (NZ Herald) | Phorest FrontDesk AI | NZ minimum wage 2026 (MBIE) | Jobs & Skills Australia — beauty therapists | CreditorWatch Business Risk Index | AFR Street Talk — endota sale

INSIDE INDUSTRY

Professional beauty marketing & strategy · Prepared June 2026