

# Independent Stylists U.S. and Germany Market Brief

**Base Year: 2021**

**Forecast: 2026**

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August 2022**

**Germany Published:  
November 2022**

**2<sup>nd</sup> edition**

Independent hairdressers comprise an increasingly important target group for hair care companies, yet little information is available on this segment.

At the beginning of 2020, for the first time, Kline surveyed more than 1,200 independent stylists globally, to understand their behavior and attitudes. This second edition provides an update on the markets previously covered and brand-new insights on markets covered for the first time.

## SCOPE

This report compiles a quantitative survey among independent hairdressers and opinions from unstructured interviews with industry experts across Germany and United States. Observing the increasing number of hairdressers working independently with a decreasing number of salons as a result of 2020-2021 pandemic situation, this group is more-than-ever important to target. It is essential to understand from where they purchase products, which brands they purchase and why, and what motivates them to select brands and sell products. The report includes information on:

- › Number of independent stylists
- › Their monthly revenues
- › Where they do styling
- › Their clients' profile
- › Services they provide
- › Product retailing and spending on salon hair care products
- › Their product purchase channels
- › Brands they use
- › Impact of pandemic on their work
- › Market development through 2026

**Results from this study should enable companies to create partnerships and agreements with independent hairstylists based on their profile and needs.**

# METHODOLOGY

- **Quantitative Study**
- Sample size (per country): N=200
- Method: 20-minute telephone interviews
- Fieldwork: February 2022
- Sample composition:
  - Female and Male
  - Working full- or part-time as independent hair stylists, minimum 18 hours per week
  - Working from their clients' homes, from their own homes, renting a chair or a space in a suite, or do mobile hairstyling with own vehicle
  - All are responsible for choosing and buying products
- **Unstructured interviews** with industry experts from manufacturers, distributors, associations, media, or salons

**Table 1: MARKETS**

United States

Germany - NEW



**Table 2: PRODUCT CATEGORIES**

- Conditioners (includes bond builders)
- Shampoos
- Hair coloring products
- Hair styling products
- Hair texturizing products



# METHODOLOGY

## Information Gathered from Quantitative Survey

- **Socio-demographics**
  - Gender, Age
  - Length of their career as a hairdresser and as an independent hairdresser
  - Number of working hours per week. Average number of customers they see per week
  - Monthly revenue
- **Places where they carry out hairdressing**
  - Places they carry out hairdressing
  - Time spent by them at those places
  - Number of places that they carry out hairdressing
- **About their customers**
  - For whom they do hairdressing
  - How much time they spend with each of their customers
- **Services they provide**
  - Services they provide
  - How their revenue is split by type of service
  - The average price their customers pay for hair coloring, hair cutting, and styling, as well as men's hair cutting
- **Brands they use or sell to customers**
  - Hair care products that they use or sell to customers
  - The amount that they pay for product purchase per month
  - Their expenditure split among products they use or sell to customers
  - Brands they use
  - Reasons for selecting the brands they use
- **Purchase channels**
  - Where they purchase products from
  - Share of each purchase channel on their total expenditure
  - Number of channels they source products from
  - Quantities of products bought online and traditionally
- **Product sales**
  - Number of hairdressers that sell products to clients
  - Whether they do not sell products to customers or do it rarely, and why
  - What would encourage them to sell more products to customers
- **Business performance last year**
  - Their business performance last year

## Information Gathered from Unstructured Industry Interviews

- **Number of hairdressers in the market**
- **Number of hairdressers working independently**
- **Outlook**
- **Additional insights helping understand the market and survey results**

# REPORT BENEFITS

This program provides subscribers with an understanding of the lives and work of independent stylists in Germany and United States. Results from this study will enable companies to reflect market changes after the pandemic and create effective partnerships and agreements with independent hairstylists based on their profile and needs.

## Deliverables

- Report combining findings from survey and unstructured interviews
- Survey results tabulations
- The possibility to compare results with 2020 research
- Incorporating expertise from the Kline Salon Hair Care annual study.

# METHODOLOGY

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

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