



TACIR

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on Intergovernmental Relations



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MEMORANDUM

TO: Commission Members

FROM: Cliff Lippard
Executive Director

DATE: 18 September 2025

SUBJECT: Public Chapter 102, Acts of 2025 (Cosmetology and Barbering Professions)—Update

Public Chapter 102, Acts of 2025, directs the commission to study the economic effect of the cosmetology and barbering professions in Tennessee. This includes the revenue generated through services provided and retail sales, the number of jobs generated by the professions, training and education opportunities, and potential barriers to entry into the industry. This memo provides a preliminary overview of staff research regarding industry growth trends and regulatory, licensing, and training requirements.

The cosmetology and barbering industry is growing nationally and in Tennessee.

According to the US Bureau of Labor Statistics (BLS), in 2024 there were 651,200 barber, cosmetologist, and hairstylist jobs nationwide, and overall employment was projected to increase 5% between 2024 and 2034, faster than the average 3% growth for total employment. These employment increases are because of growing demand for hair, nail, and skincare services, including increases both in the range of services offered and in the male customer base.¹ Within these industries, a large percentage of workers are

¹ U.S. Bureau of Labor Statistics "Occupational Outlook Handbook." Data retrieved August 15, 2025. <https://www.bls.gov/ooh/personal-care-and-service/barbers-hairstylists-and-cosmetologists.htm>.

self-employed. The BLS estimates that, nationwide, 48% of cosmetologists, hairdressers, and hairstylists and 76% of barbers were self-employed in 2024.²

The trend for these industries in Tennessee tracks the growth seen nationally. The Tennessee Department of Labor and Workforce Development classified cosmetologists and barbers as in-demand occupations in 2023.³ As of July 2025, there were 91,610 active cosmetology and barbering licenses of all types issued by the Tennessee Board of Cosmetology and Barber Examiners—an increase of 15.2% since 2015.⁴ Among the different license types, most have increased over the last 10 years, with aesthetician licenses seeing the greatest increase overall, while dual licenses for cosmetology and master barber shops, skincare shop licenses, and natural hairstylist licenses have had the largest percentage increases. Some license types have seen decreases including barber technician, master barber, barber and full-service cosmetology shop, cosmetologist/aesthetician, and shampooist/manicurist. Several new license types have been established since 2015. Although holding an active license does not necessarily mean an individual or entity is practicing or operating, and individuals and entities can hold more than one license, the overall increase in active licenses is reflective of growth in the industry over the last 10 years. See table 1.

² U.S. Bureau of Labor Statistics “Occupational Outlook Handbook.” Data retrieved August 15, 2025. <https://www.bls.gov/ooh/personal-care-and-service/barbers-hairstylists-and-cosmetologists.htm#tab-3>.

³ “An in-demand occupation is a job that Tennessee employers have a high demand to fill. An occupation is measured as in-demand when two of three measures of demand (job postings, projected job openings, and hires) are above the median in those measures relative to other occupations within the region.” “Improving the Pipeline for Tennessee’s Workforce: Academic Supply for Occupational Demand Report 2023.” <https://www.tn.gov/content/dam/tn/thec/bureau/research/other-research/supply-demand/2023%20Supply%20and%20Demand%20Report.pdf>. Data retrieved from “BLS Occupational Employment and Wage Statistics Query System,” August 13, 2025.

⁴ Commission staff analysis of data received in an email from Roxana Gumucio, executive director, Regulatory Boards Division, Tennessee Department of Commerce and Insurance, July 9, 2025.

**Table 1. Active Barber and Cosmetology Licenses
2015 Compared to 2025**

License Type	Number of Licenses in 2015	Number of Licenses in 2025	Percent Change
Barber			
Barber Technician	34	25	-26.5%
Master Barber	6,088	5,979	-1.8%
Barber Shop	2,264	1,374	-39.3%
Barber School	27	40	48.1%
Cosmetology			
Aesthetician	4,443	10,767	142.3%
Cosmetologist	38,679	39,587	2.3%
Cosmetologist/Aesthetician	9,399	4,412	-53.1%
Eyelash Specialist*	0	84	
Hair Braider*	0	5,794	
Manicurist	8,216	10,931	33.0%
Natural Hair Stylist	139	438	215.1%
Shampooist/Manicurist	122	48	-60.7%
Eyelash Shop*	0	43	
Full-Service Cosmetology Shop	7,913	7,303	-7.7%
Manicure Shop	970	1,044	7.6%
Manicurist/Skin Care Shop	391	858	119.4%
Natural Hair Stylist Shop	36	56	55.6%
Skin Care Shop	344	1,292	275.6%
Cosmetology School	88	117	33.0%
Dual Barber and Cosmetology			
Dual Barber Instructor*	0	39	
Dual Cosmetology Instructor*	0	12	
Dual Cosmetology and Master Barber Shop	352	1367	288.4%
Total	79,505	91,610	15.2%

*These licenses didn't exist in 2015: Dual barber and dual cosmetology instructor licenses were created in 2023, eyelash instructor and shop licenses were created in 2024, and the hair braider license was created in 2020.

Source: Commission staff analysis of data received in an email from Roxana Gumucio, executive director, Regulatory Boards Division, Tennessee Department of Commerce and Insurance, July 9, 2025.

Tax revenue from the industry is increasing. Between fiscal year 2018-19 and 2024-25, total state and local tax revenue from beauty supply shops, barber shops, beauty salons, nail salons, and cosmetology and barber schools went from \$35.3 million to \$75.7 million—a 114.5% increase.⁵ These totals include franchise, excise, and business tax revenue, as well as state and local sales tax on products sold, such as shampoo and conditioner and skin or nail care products—like other services, cosmetology and barbering services are not subject to sales tax in Tennessee.⁶ Not all cosmetology and barbering businesses are subject to franchise and excise taxes. See table 2.

⁵ Emails from Jeff Bjarke, statistical researcher, Tennessee Department of Revenue, July 21 and August 18, 2025.

⁶ Tennessee Code Annotated, Section 67-6-205; and Tennessee Department of Revenue “Revenue Ruling #07-04.” <https://www.tn.gov/content/dam/tn/revenue/documents/rulings/sales/07-04.pdf>.

**Table 2. Tax Revenue
Fiscal Year 2018-19 Compared to Fiscal Year 2024-25**

Taxpayer	Tax	Fiscal Year 2018-19	Fiscal Year 2024-25	Percent Change
Beauty Supply Shops	State Sales Tax	\$ 20,963,184	\$ 47,368,885	126.0%
	Local Option Sales Tax	7,245,027	17,255,001	138.2%
	Franchise and Excise Tax	385,192	1,934,139	402.1%
	Business Tax	596,313	1,271,140	113.2%
	Total	\$ 29,189,716	\$67,829,166	132.4%
Barber Shops	State Sales Tax	\$ 208,731	\$ 200,071	-4.1%
	Local Option Sales Tax	71,670	73,560	2.6%
	Franchise and Excise Tax	43,735	142,210	225.2%
	Business Tax	81,587	158,978	94.9%
	Total	\$ 405,723	\$ 574,819	41.7%
Beauty Salons	State Sales Tax	2,669,964	2,730,129	2.3%
	Local Option Sales Tax	927,066	985,589	6.3%
	Franchise and Excise Tax	440,772	775,005	75.8%
	Business Tax	811,777	1,144,451	41.0%
	Total	\$ 4,849,580	\$ 5,635,174	16.2%
Nail Salons	State Sales Tax	\$ 42,927	\$ 60,273	40.4%
	Local Option Sales Tax	14,927	22,055	47.8%
	Franchise and Excise Tax	279,038	638,118	128.7%
	Business Tax	330,059	662,47	100.7%
	Total	\$ 666,951	\$ 1,382,917	107.3%
Cosmetology and Barber Schools	State Sales Tax	\$ 122,205	\$ 184,268	50.8%
	Local Option Sales Tax	44,826	71,447	59.4%
	Franchise and Excise Tax	1,690	2,395	41.7%
	Business Tax	10,741	16,941	57.7%
	Total	\$ 179,462	\$ 275,051	53.3%
Total All Taxes		\$ 35,291,430	\$75,697,127	114.5%

Note: Fiscal year 2018-19 is the earliest full year of data provided by the Department of Revenue because of a data system change within the Department in 2017.

Source: Emails from Jeff Bjarke, statistical researcher, Tennessee Department of Revenue, July 21 and August 18, 2025.

The Tennessee Board of Cosmetology and Barber Examiners regulates the industry in the state through licensing.

The Tennessee Board of Cosmetology and Barber Examiners regulates both the barbering and cosmetology professions to protect public health, safety, and welfare of consumers.⁷ The regulated professions and entities include cosmetologists, instructors, aestheticians, manicurists, natural hair stylists, hair braiders, eyelash specialists, cosmetology shops, master barbers, barber technicians, barber instructors, barber shops, and barber and cosmetology schools. These individuals, shops, and schools must all have a license issued by the Board to provide services in the state. Separately, prospective shop owners are subject to the same requirements for obtaining business licenses as any other business in Tennessee.⁸

Tennessee requires training for individuals seeking licenses in cosmetology and barbering. The requirements for individuals to obtain a license for a specific profession vary and are distinct from the requirements to obtain a license to operate a shop or school. To obtain a cosmetologist or master barber license in Tennessee, the Board requires individuals to complete 1,500 hours of training.⁹ Training requirements for other types of licenses include

- Manicurist – 600 hours
- Aesthetician – 750 hours
- Natural hair stylist – 300 hours
- Eyelash specialist – 300 hours
- Barber technician – 340 hours
- Instructor – 300 hours (must have already been licensed three years)

⁷ Tennessee Department of Commerce and Insurance “Cosmetology and Barber Examiners.” <https://www.tn.gov/commerce/regboards/cosmo.html>.

⁸ Tennessee Department of Revenue “For New Businesses.” <https://www.tn.gov/revenue/for-businesses/for-new-businesses.html>.

⁹ Rules of the Tennessee Board of Cosmetology and Barber Examiners, Chapter 0440-01-.13 and Chapter 0200-01-.11.

Twenty of the Tennessee Colleges of Applied Technology offer barbering or cosmetology training programs¹⁰—and there are 138 private schools¹¹ in the state that also provide these programs. High school students can participate in programs through the Department of Education’s Career and Technical Education program or by taking dual-enrollment courses.¹² There are also several programs for people who are incarcerated through the Tennessee Department of Correction and Shelby County Division of Corrections.¹³

After completing the required education, students must pass a practical exam and a theory exam to receive their license and pay fees at a cost of \$67 per exam. The Board charges fees for licenses and renewals for individuals, shops, and schools. For individuals, license and renewal fees are \$60, and for instructors, they are \$80 and \$70, respectively. Individual, instructor, and shop licenses renew every two years, and school licenses renew every year.¹⁴ See table 3.

The process for obtaining a license to open and operate a shop or school is different from what is required for an individual to obtain their license. The primary requirements for shops and schools include proper sanitation, equipment, and space. Schools are also required to have admission policies and reporting and administrative processes, and they must meet goals for licensure exam scores and attendance.¹⁵

¹⁰ Staff review of programs offered at individual Tennessee Colleges of Applied Technology (TCAT). TCATs with barbering or cosmetology programs include Athens, Chattanooga, Crump, Dickson, Elizabethton, Harriman, Hartsville, Henry/Carroll, Hohenwald, Jacksboro, Knoxville, Livingston, McMinnville, Memphis, Morristown, Murfreesboro, Nashville, Northwest, Oneida/Huntsville, and Upper Cumberland. Some TCATs offer programs at more than one location.

¹¹ Tennessee Department of Commerce and Insurance “Listing of Barber Schools.” <https://www.tn.gov/commerce/regboards/cosmo/license/barber-schools.html>; and Tennessee Department of Commerce and Insurance “Listing of Cosmetology Schools.” <https://www.tn.gov/commerce/regboards/cosmo/license/cosmetology-schools.html>.

¹² Interview with Tennessee Higher Education Commission staff, June 24, 2025.

¹³ Interviews with Tennessee Department of Correction staff, August 5, 2025; and Shelby County Division of Corrections staff June 16, 2025.

¹⁴ Rules of the Tennessee Board of Cosmetology and Barber Examiners, Chapter 0440-01-.13 and Chapter 0200-01-.11; and email from Roxana Gumucio, executive director, Regulatory Boards Division, Department of Commerce and Insurance, May 12, 2025.

¹⁵ Rules of the Tennessee Board of Cosmetology and Barber Examiners, Chapter 0440-01 and Chapter 0200-01.

Based on a preliminary review, Tennessee’s regulation of the cosmetology and barbering industry is like most other states.¹⁶ Tennessee’s 1,500-hour requirement for training aligns with 23 states for cosmetology and 24 for barbering. Eight states require 1,000 hours of training for a master barber license, and only two states, Iowa and Nebraska, require 2,000 hours or more. Similarly, to obtain a cosmetologist license, only two states, Massachusetts and New York, require 1,000 hours of training, while five states require 2,000 or more.¹⁷ Tennessee’s initial cost of licensure, along with Oklahoma, is the lowest in the country, and only three other states have a renewal fee of \$60 for cosmetologists.

To ensure that license and sanitation requirements are met, the Division of Regulatory Boards within the Department of Commerce and Insurance assigns field inspectors to areas of the state to conduct inspections of new and existing businesses and investigate complaints for all regulatory boards in Tennessee, including the Board of Cosmetology and Barber Examiners. When they find a violation, field inspectors give the business a notice of violation form and submit a complaint to the regulatory board’s complaints division. Consumers can also submit complaints to that division, which are reviewed using the same process as inspectors’ complaints. The most common complaints involve improper sanitation practices and expired licenses.¹⁸

¹⁶ Commission staff analysis of data received in an email from National Conference of State Legislatures staff, July 2, 2025.

¹⁷ Ibid.

¹⁸ Interview with Department of Commerce and Insurance, Regulatory Boards Division and Office of Legal Counsel staff, August 1, 2025.

Table 3. Summary of Examination and License Fees

Item		Fee Amount
Theory Exam		\$67
Practical Exam		\$67
Original license	cosmetologist, manicurist, aesthetician, natural hair stylist, eyelash specialist, master barber, and barber technician	\$60
	instructor - cosmetology and barber	\$80
Renew license	cosmetologist, manicurist, aesthetician, natural hair stylist, eyelash specialist, master barber, and barber technician	\$60
	instructor - cosmetology and barber	\$70
License for cosmetology, manicure, skin care, natural hair stylist, manicure/skin care, eyelash services, or barber shops	new shop	\$100
	inspection of new shop	\$50
	renewal	\$75
Barber and cosmetology schools	new school	\$350
	renewal - annual	\$150
Reciprocity	barbering and cosmetology individual licenses	\$100

Note: This table does not include all fees charged by the Board of Cosmetology and Barber Examiners.

Source: Rules of the Tennessee Board of Cosmetology and Barber Examiners, Chapter 0440-01-.13 and Chapter 0200-01-.11; and email from Roxana Gumucio, executive director, Regulatory Boards Division, Department of Commerce and Insurance, May 12, 2025.