

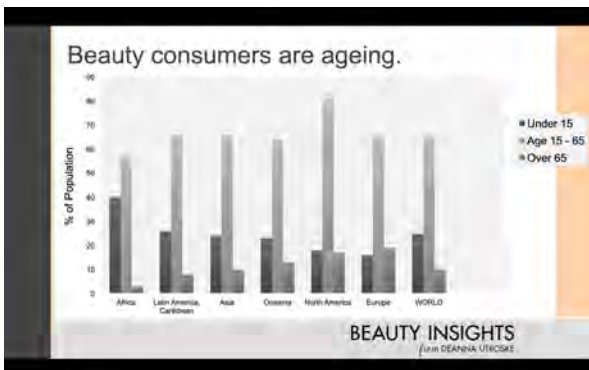
BEAUTY INSIGHTS

from DEANNA UTROSKE

Preventative and Reparative Skincare for Every Generation

As you know, how the cosmetics and personal care industry as well as how beauty consumers are thinking about anti-aging is changing. It's changing in part because of who among us and how many of us are quote-unquote old—because demographics are shifting. But more importantly, how our industry and the end consumer we serve think about anti-aging is changing because our global culture and social beliefs are changing.

Today, I am going to talk through current and forward looking consumer expectations. And we will think about how care routines, products, and brands resonate with contemporary beauty consumers across generations. We will also consider how manufacturers, ingredient makers, and media are responding to the growing demand for preventative and reparative skincare.



Let's start with a very basic truth: all beauty consumers are aging.

We hear a lot of data about the spending power of select generations. Just last month, Emily Dougherty published an article in BeautyInc with the headline: Why Gen X Could Be Beauty's Biggest Consumer Base.

Today Gen X consumers are at least in their mid 40s and some in this generation are nearly 60 years of age. As Dougherty wrote, "Gen X significantly outspends all other generations — 44 percent more than Boomers and 18 percent more than Gen Z. Women over 50," she emphasized, "have \$15Trillion... to spend; yet less than 5 percent of marketing targets them."

We will see some evidence here today that the marketing spend is moving to reach a wider spectrum of beauty consumers. Research & Innovation dollars are similarly being allocated to ensure that beauty makers meet consumers where they are.

It's worth noting that the World Health Organization projects that by 2050 there will be more than 2 billion people over the age of 60; and in that same year, there will be more than 425 million people over age 80. While population changes in key beauty markets have helped us reimagine what anti-aging is and could or should be, preventative and reparative beauty products address the skincare needs of everyone. So, the data that I've put up on the screen here highlights population numbers of not only older individuals but of youth, seniors, and everyone-in-between, all around the world.

This is population data sourced from statista.com. It's organized roughly by continent: and on your far right is the entire global population. Within each continent, the dark bar on your left shows the percentage of the population on that continent under age 15. The light grey bar in the center is the percentage of the population between age 15 and 65. And the bar on the right is the percent population over 65 years of age.

The simple truth is: all beauty consumers are aging. It does not matter which demographic you serve, what region you operate in, what market tier your product reaches or even what finished goods category you support. Beauty consumers are aging, because aging is living.

As we look ahead to 2023, what wellness means is being shaped by our digital connectedness and global awareness, by our pandemic experience, and by a multitude of social, political, environmental, and ethical issues confronting humanity.

Wellness is often a luxury. But the concept of wellness now extends far beyond the general wellbeing and physicality of the individual. It's a concept and a state of being that is in continual conversation with our communities, our countries, and our planet, as well as our bodies, our minds, and our spirits. Wellness today is a very comprehensive and a very compassionate practice.



Effective skincare has always mattered. Today, we're seeing a renewed interest in clinical data that shows the efficacy of skincare ingredients and consumer products because for several years, recently, the emphasis was on natural beauty and then clean beauty—both underscoring the consumer interest in safe and sustainable products. Now, as more suppliers move away from chemistry that relies on petrochemicals, we see a renewed emphasis on sophisticated bioactives and measurably effective alternatives to conventional inputs.

Daily sunscreen is increasingly understood to be one of the best ways consumers can care for their skin. Only a few decades ago, our knowledge of how ultraviolet light impacts the skin was remarkably limited. Today, statistics about the effects of photoaging are everywhere; and SPF is showing up in products across categories: skincare, color cosmetics, body care, and hair care. I am not aware of any fragrance products that include SPF, but I have come across fragrance developed to smell like sunscreen, which indicates that even the suggestion of sun care leaves a desirable impression.

I will say more about sun care later on in my remarks, but since we are thinking about the growing normalcy of daily sun care, I want to mention that ingredient maker DSM has been working with members of the US congress in hopes they will convince the Occupational Safety and Health Administration (commonly known as OSHA) to designate sun care as Personal Protective Equipment, something that's necessary for outdoor work.

And I have healthy aging resources up on the slide. This simply refers to various resources in beauty, in health care, and elsewhere in society that are helping move consumer expectations.



Today, consumers of every generation are aware of how skin can change over time. Maybe not because of time but because of common circumstances, skin changes. And it seems as if not all of those changes are necessary or advantageous at this moment in human evolution.

This is where preventative skincare fits in. Consumers are looking ahead to perhaps the next decade of life and they are taking steps to prepare for that future.

Also, since skin does change over time, consumers are looking for products and care routines that will restore the full function of their skin. You may be familiar with restorative yoga, a practice meant relax the body and reduce stress. Restorative skincare is about recovering from physical, environmental, and emotional experiences to arrive at the best place possible.

I made up the term 'real-age skincare' to convey the idea of skincare that addresses the skin in the moment it is in. Now that may be the same products for people in a range of generations or it may be different products for different people. (There is at least one brand using the term 'real-age skincare' and that is an indie brand called I KNOW Skincare Treatments, founded by Germaine Bolds-Leftridge; so I wanted to take care to give her credit.) The beauty consumer expectation that aligns with the idea of 'real-age skincare' is about care in the present tense. It's about living in the now, about daily care products and practices, and it's about skin maintenance.

We hear this as-you-are-today idea of beauty in messaging that reaches consumers across generations. The skincare brand called Selfmade fits in with an assortment of brands that Allure magazine describes as, "made for you". Any number of articles and trend presentations today explain that Gen Z consumers are drawn to brands encouraging this generation to "be more you".

And brands like Better not Younger are intent on "[changing] the narrative around aging." Founder Sonsoles Gonzales explains on this hair care brand's site, "I see aging as a way of unlocking potential, a daily opportunity to look better and I wanted to launch a brand that spoke to an empowered woman that believes you can look better without looking younger."

When we talk about daily care practices, we're talking about skincare routines and personal habits. The wellness mindset has helped broaden beauty routines.

Skincare, both the products and the daily maintenance practices, took on a heightened importance during the early years of the covid-19 pandemic. And many consumers noticed that habits help them feel secure, that habits result in incremental progress, that new habits are easier to develop in tandem with existing habits; and, since the pandemic afforded some consumers with a long stretch of self-observation, the rewards of skin maintenance and other habits were easier to recognize. So for many consumers, this new level of dedication to skincare continues today.



But as the slide suggests, beauty routines are more comprehensive. Consumers now consider self-care a part of their regular skincare, grooming, and beauty routines. Self-care can include things like rest, recreation, intimate wellness, time management, outdoor activity, flexible work, hydration and nutrition, breathwork, and more.

Mental health now figures into beauty routines too. And the Selfmade brand, that I just mentioned, is a shining example of how founders, formulators, and consumers alike are building mental health into skincare. That brand, founded by Stephanie Lee, is known as "the first emotionally intelligent personal care brand."



Skin analysis is happening now in all sorts of places outside the lab. Thanks to high-tech clinical devices, apps leveraging AI and AR, brand-specific tele-consults, and product recommendation engines powered by deep learning, the skincare industry is gathering data on how consumers use product as well as on their skin condition. And this information reveals a spectrum of consumer expectations as well as measurable benefits, all of which can be used to inform the development and marketing of real-age skincare.

We can see tech being used to gather data both for and from consumers in examples like these: The clean skincare brand Codex Labs is newly focused on OTC skincare, "skin analytics for data-driven skin health management", and recently introduced DermSCORE 1.0, an AI skin tracker that lets consumers track their skin health progress online or on their phone. The tracker shares information on inflammations, comedones, and post-inflammatory hyperpigmentation.

The multilevel marketing brand NuSkin launched a new skincare device this month that, in tandem with the brand's app, offers consumers customized treatment options, intelligent coaching, skincare routine tracking, and more.

And the European premium beauty retailer Douglas added an AI-based skin analysis tool to its app. According to a recent post about the new tech feature, "customers can scan their face via smartphone camera and have their skin type and skin characteristics determined....[Then,] product suggestions...are individually tailored to [their] needs and preferences."

Of course beauty tech leaders like Perfect Corp, Revieve, and EveLab Insight are helping countless brands and retailers gather data and recommend products.

Protective skincare is a category that has expanded beyond classical SPF protection to include products that somehow shield skin (or hair) from any number of so-called environmental aggressors: blue light, pollution, dust, smoke, etc. Some products on the market, like The Protective Lotion from Canada-based Metrin Skincare for example, even promise to protect the skin from excess bacteria.

On the ingredient side, Uute Scientific Oy of Finland brings a significant innovation in beauty science to the protective skincare conversation—one that helps elevate skincare benefits to a more preventative status. This company's work is premised on the idea that as human life has become increasingly urban and lived in built environments our natural microbial diversity has lessened and with it our immunity has diminished too. ReConnecting Nature is a microbial extract from soil found on the Finish forest floor. And the ingredient is not only showing up in skincare products but is also being used in hair care, textiles, and toys to help prevent (and thereby protect from) immune-mediated diseases and skin conditions.



Reparative skincare encompasses many classical anti-aging ingredients and benefits; and it has increased in recent years to include newly popular ingredients like collagen and to address more concerns brought to light by emerging science, such as microbiome care and inflamaging.

Real-Age skincare is about care and maintenance in the present. Sure, it will incorporate products that address the past experience of skin as well as take into account what's likely to occur in the future. But it's not about disrupting biology. It's about care in this moment that leaves us 'better not younger' (recall the hair care brand of that name, led by Sonsoles Gonzales, I mentioned a moment ago).



Beauty brands from around the world are approaching age in contemporary ways and reinventing skincare.

Brands focused on preventative and reparative skincare for women who have experienced menopause are doing important work re-evaluating and reinventing how age is considered in beauty product development and marketing. Here I would point you to brands like Caire Beauty (spelled c a i r e), State of Menopause, Womaness, and Pause Well Aging.

And brands like Good for you Girls show what real-age skincare looks like for consumers in their tweens. Reparative skincare is not exclusively for older consumers. Preventative and reparative are not different stages of care. Consumers across the generations can benefit from both preventative and reparative skincare.

A new brand called Active Skin & Mind from Coty and Adidas promises to deliver skincare benefits of 'optimal performance and recovery', a fitness analogy that aligns quite neatly with preventative and reparative skincare.

And we now see brands dedicated to ensuring that consumers of every age and of every skin tone know the importance and value of using SPF each day. Brands like Black Girl Sunscreen and Supergoop! are making important strides, helping educate consumers about the skincare benefits of daily SPF protection.

As I wrote lately in a brief news item about the Supergoop! brand, "Consumer compliance has long been a challenge for brands in sun care. Supergoop!, launched in 2007, has been a leader in education and formulation, helping the everyday sun care movement build real momentum. Skin cancer prevention is the brand's very reason for being; and it's this purpose that has guided the brand's growth over the years."

I also want point out that purpose-driven brands are solving challenges, like consumer compliance around sun care use, in novel ways; and that because of this, they are important guides as we look for better ways to do business.

As the BGS site explains: "Black Girl Sunscreen was designed to start the conversation around sun protection and education. BGS took the #1 reason Black women weren't wearing sunscreen and solved it in a way that connected with them specifically.

"Our community matters and when it comes to melanoma, Black people have a lower survival rate due to late diagnosis compared to other races. Decreasing the risk of melanoma is just as important as decreasing the number of people that die from it, wearing sunscreen is essential.

"BGS has you looking good and feeling good by leaving no white cast through incorporating moisturizing ingredients that also protect your skin."

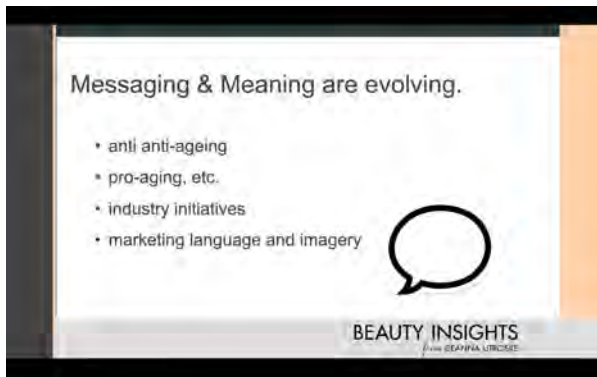
Purpose-driven brands like these are important examples of how new perspectives can bring about positive change.

Daniela Morosini reported for Vogue Business recently, that Shiseido intends to become the world's biggest 'skin beauty' company by 2030. The term 'skin beauty' is quite smart in how it can replace 'anti-aging' and how it cosmeticizes 'skincare'. And skin beauty is a good descriptor for beauty-from-within or ingestible skincare too, a category that Morosini says the company plans to include in their efforts to grow revenue with premium and world-leading skincare.

I saw a presentation on the video commerce platform QVC this year that featured Unilever's Tatcha skincare brand. And the brand representative said, "if you're in the preventative stage" ...and whatever product they were featuring, therefore, would be good for you.

It wasn't until days after I heard that when I recognized that this phrase, "if you're in the preventative stage" is not only an example of how our language around skincare is shifting but that it's also a cautionary example.

It is important that we don't create an either-or sort of divide between preventative and reparative skincare. I maybe haven't been clear about this yet, but preventative skincare is not exclusively for younger consumers. And reparative skincare is not exclusively for older consumers. Preventative and reparative are not different stages of care. Consumers across the generations can benefit from both preventative and reparative skincare.



“We’ve taken a stand against the beauty industry’s anti-ageing narrative by renaming our best-selling Drops of Youth range to Edelweiss!” wrote David Boynton, CEO at The Body Shop, in September of this year (2022). And that is a good illustration of how brands are helping to change the conversation around aging.

Other brands, like RoC, are now focused on being Pro aging. Gryphon Investors acquired RoC Skincare from J&J at the start of 2019. And perhaps this new leadership is behind their pro-aging initiative. Emma Sandler, in her coverage of the initiative for Glossy.co, calls the new RoC, “a beauty brand emotionally supportive of its consumers.”

You may recall that just over a year ago, Unilever announced its vision for positive beauty, which meant that the company removed “the word ‘normal’ from all of [its] beauty and personal care brands’ packaging and advertising.”

The Openstreams Foundation (led by Lan Vu, who is also CEO of the trend forecasting firm Beautystreams) is taking an industry-wide view. The Foundation’s “Stop Age Anxiety initiative helps to prepare the beauty industry for the inevitable rise of older populations and longer life expectancy, in order to offer products and marketing communications that will resonate with them.”

And one more example that highlights how imagery is changing: in 2021, the Laura Geller makeup brand committed to featuring only women over the age of 40 in marketing and on social media. As Laura told the press late last year when it was announced that Paulina Porizkova would be the face of a new brand campaign, “We want to make all women feel beautiful and worthy whether they’re 19 or 90...Let’s get old together—and look great doing it!”

Skincare innovation applies to products for and beyond the face. You’ve likely heard about the ‘skinification’ of body care, of hair care, of makeup, and so on.

The brand youthforia for instance advertises its products as “makeup you can sleep in.” According to the youthforia site, “Makeup is an extension of your skincare.” And the brand says, “We tested all of our products by sleeping in it for an extended period of time. And woke up with better skin!” This only emphasizes that there is an expectation of continual care for skin in the present moment.

Cosmetic and personal care ingredient suppliers and manufacturers are well aware of the emerging demand for preventative and reparative skincare.



For instance, Capsum, a contract manufacturer headquartered in France with production in that country as well as in the US was for years thought of as a facial skincare and serum specialist. But Capsum now has production capabilities for skincare, body care, hair care and more. And serum, with either preventative or reparative benefits—or both—is a product format in nearly every category.

While preventative and reparative skincare reminds us that a wide range of consumers have a lot in common, it also requires that we consider the unique attributes and experiences of each consumer. Mental and emotional stress can affect the skin. And ingredient makers are developing solutions accordingly.

The US-based specialty chemicals company Lubrizol makes a skincare ingredient called Telophi. This biotech extract, “...protects skin telocytes and proliferating epidermal stem cells from psychological stress...”

Lack of sleep impacts the skin. So Mibelle Biochemistry, an ingredient maker out of Switzerland, has developed IceAwake. This intriguing skincare ingredient is “based on an extract of the bacteria *Iodobacter ssp.*, which was isolated from the soil below a Swiss glacier. IceAwake rejuvenates skin [affected by] ...too little sleep” and in testing has been show to improve chaperone expression in aged fibroblasts, increase ATP production in a cellular sleep deprivation model, and reduce Endoplasmic reticulum stress.

The skin responds to menopause of course. And here we see ingredient launches like Feminage from Sederma. This active is “especially dedicated to...women experiencing loss of skin elasticity and firmness caused by glycation and oxidation events and related to oestrogenic decline.”

Ingredient maker Active Concepts also has ingredients in its portfolio that the US-based company says are well suited to the needs for women who have experienced menopause.

Active Concepts' AcquaSeal Coconut ingredient is said to reduce transdermal water loss and provide intense moisturization. The company bills the ingredient as a botanical alternative to Lanolin "capable of holding 200% of its weight in water." They also make an ingredient called BiEau Actif Brown Algae. This ingredient relies on the long-chain, sulfated polysaccharide fucoidan and promises to reduce fine lines and wrinkles by some 28%.

Photoaging from exposure to sun light calls for preventative and reparative ingredients. And in much the same way that suppliers need to meet current and future-forward skincare expectations for consumers of various ages, so too do they need to develop solutions that provide preventative and reparative benefits for consumers of every skin tone.

Solésence comes to mind here. This product manufacturer specializes in SPF and other mineral-based environmental defense solutions that suit a range of skin tones. For instance, Solésence Beauty Drops can be developed as a tinted serum in 6 shades or as foundation in up to 18 shades.

Gattefossé has an ingredient called Solastemis that offers both protection and repair benefits for skin exposed to sun light. The company is marketing the skincare ingredient by emphasizing that "80% of extrinsic aging is photoaging!" Skin smoothness, skin radiance, and protection from UVA damage are among the benefits of Solastemis.

Dedicated anti-pollution ingredients also figure into the conversation about preventative and reparative skincare. An item published this summer on Cosmetics & Toiletries, shares data from Future Market Insights that projects the anti-pollution ingredients market in the US alone is expected to hit \$1.4 billion by 2031 because of "a dramatic rise in the incorporation of active, functional ingredients in personal care and cosmetic products with anti-pollution effects."

For years now, select ingredient makers, clinical testing companies, and brands have zeroed in on the exposome and on how all the internal and external details that skin responds to contribute to skin appearance and skin wellness. And I have been wondering, Are consumers not yet ready for exposome beauty? Why isn't this gaining momentum? Then I recognized that from the industry side of it, for those working in R&D, clinical testing, cosmetic chemistry, we're talking about exposome beauty. For consumers, we're talking about personalized beauty.

I'll share a quote now from Daniel Whitby, Lead Scientist with the formulations specialist Smink Laboratories. Whitby showed a poster on Longevity, Well-Ageing, and Lifetime Skin Health at the IFSCC congress here in London recently. He noted that, "To achieve a lifetime of total skin health we need to understand the key factors which affect skin throughout consumers ever-increasing lifespan." (find the full-text of Daniel Whitby's research in the additional resources section at the end of this PDF) I shared that quote to illustrate that in order to develop preventative and reparative products that meet consumer expectations, we need to focus on the exposome and on all that data gathered via tech tools.

Oxidative stress is one such concern that beauty makers are actively creating skincare solutions for. A sure sign of progress is when clinical testing companies see demand for data that backs up a given benefit. And just this past July, the clinical testing company GeneMarkers introduced an Environmental Stress Panel that helps determine "if pre and/or post treatment with a topical product can prevent or repair damage induced by..." oxidative stress response or inflamaging or mitochondrial function.

Another poster displayed at this year's IFSCC congress was from Dr Remo Campiche, a Senior Scientist at DSM. His poster was on how topically applied human milk oligosaccharides can attenuate inflammation and oxidative stress in human skin induced by solar irradiation. He believes that his data expands the choice of anti-aging molecules for cosmetic formulation. I would argue that this data expands the choice of preventative skincare ingredients.

And while we're thinking about oxidative stress, I want to point out a brand called i-on. i-on calls itself an "age disrupting skincare" brand. The brand is premised on the finding "that iron produces harmful free radicals that can contribute to...visible signs of skin aging." And according to the i-on site, the brand's products are "clinically proven to remove excess iron from the surface of the skin and reduce the appearance of visible lines and wrinkles, increase the appearance of elasticity, even skin tone, plump skin, and help hydrate more rapidly."



I will touch very briefly on the role that beauty retail plays here. Some retailers have taken steps to depict age more realistically by not air brushing or photo shopping their own advertising, or by not allowing any altered photos to be used in store materials. And these are important steps in support of real-age skincare and social acceptance of every age as a beautiful age.

How retailers display product on the physical shelf and how they sort and filter product on the digital shelf however, complicates this progress. The category of anti-aging as well as online search terms and the clout of SEO make anti-aging a go-to concept for product discovery.

Let's look at what's happening in beauty media. You may have seen an article in Cosmetics & Toiletries last month that gave a mini preview of this year's Anti-Aging Skincare Conference. That article included a list of reparative skincare ingredients put forth by dermatologist Wilma Bergford. And they are fairly classic ingredients, like retinol, dimethicone, glycerin, etc., which reminds us that preventative and reparative skincare technologies will build upon the findings and functions of classical anti-aging skincare.

And GCI ran an article by Denise Herich of The Benchmarking Company last month titled, What Consumers Want from Beauty in 2023. For facial skincare, she wrote, "The emphasis is on skin aging prevention for younger consumers and anti-aging/maintaining for older consumers."

She does mention anti-aging here and elsewhere in her article, but terms like prevention and maintaining are just as important.

If we look at popular media and consumer beauty magazines we see something similar: In August, Mary Cleary published an article in WALLPAPER with a title that asked, "How do we create a more age-inclusive beauty industry?"

For this article Cleary spoke with Stephanie Spence, Co-Founder of color cosmetics brand 19/99. The brand is dedicated to "narrowing the generational beauty gap." Spence commented that, "Rather than looking at ageing as something that can be stopped, the industry needs to start presenting women with inspiring and creative ways that women actually do age." And Cleary noted that, "For 19/99 [this] means more inclusive advertising that depicts women at various stages in their lives wearing make-up that is more playful and vibrant than the 'natural' or 'subtle' looks often reserved for women over 40." She writes, "It also means products that are designed to work on various skin textures and tones."

There's an ELLE magazine article I want to mention here; this one is about Skin Energy. The article by Katie Becker looks at how topical product brand's like LVMH's Fresh and device brands like NuFace are working with ingredients and technologies that increase ATP production and boost skin energy. In the end, she concludes that skin energy science is still emerging. And she tells the reader that "the concepts sound tidy and the research is substantial, relative to most of the beauty claims I hear about, but there has yet to be big definitive research to convince the dermatology community of its efficacy."

So beauty consumers have been introduced to the concept of skin energy. And there is lots of room for innovation and education. Not surprisingly, scientists and ingredient development chemists are hard at work:

A preclinical biotech research company in California, intent on stopping age-related diseases like Alzheimer's and Parkinson's, began a partnership this year with academic experts. The study involves mitochondrial transplants to various organs, including skin. The tests on skin seeks to "potentially [reverse] the photoaging process on the face and hands."

Here in the cosmetics and personal care industry, suppliers like ROELMI HPC are innovating skincare ingredients that "support cell vitality by boosting mitochondrial biochemical pathways." ROELMI HPC has its headquarters in Italy and a presence in France, the Asia Pacific, and the US. The company's Ener-GY plus ingredient is causally referred to as the 'smiling skin energizer'. It increases production of ATP, is microbiota friendly, and provides a "positive condition for metabolism and trophic cell processes." According to data ROELMI shared with me, Ener-GY plus "metabolically and energetically increased active mitochondria [by] 54.9% after 24 hours," among other benefits.



Anti-ageing skincare is still relevant. Demand still exists. A segment of consumers, brands, and practitioners are very interested in classical anti-ageing skincare.

And a quick search on the luxury clean beauty site ShenBeauty.com, for instance, brings up brands like Elta MD, Vintner's Daughter, Venn, Environ, Dr Barbara Strum, and MBR with its Liquid Surgery Serum (priced at just under \$2,000 US for a 50ml size).

Personally, and I know I'm not alone here, I am hopeful that the shame and blame associated with aging will diminish in advertising, marketing, society at large, and in consumers' own hearts and minds.

It's promising that wellness and longevity have taken on a new importance in our global society. In fact, skin longevity has been identified as a trend by some industry observers, including Zoe Weiner, Beauty and Fitness Editor at Well+Good.



Shiseido's Bareminerals brand has a line of products called SkinLongevity. The subtitle and tag line for these products are: Long Life Herb Serum Collection; Clean, vegan skincare clinically shown to strengthen skin. The collection is about keeping skin stronger longer.

And a brand called Aramore Skincare, launched just this month by Harvard Medical School professor and dermatologist Dr. Sarina B. Elmariah in partnership with Stephen Kennedy Smith, is squarely focused on skin longevity. "You don't want to fight nature," Smith told Liz Flora, Glossy's West Coast Correspondent. "We want to work with nature to optimize our biology so that we can fill our human potential. That, to me," he says, "is a better goal than trying to look young forever."

"The beauty industry is entering a period of rapid transition, moving away from age-related aspects of appearance towards a broader understanding of the total functionality of skin." That's another quote from Daniel Whitby's IFSCC poster. And one that helps us understand where the preventative and reparative skincare movement can take us.

In that Wallpaper article about age-inclusive beauty, Mary Cleary shared forecasting from the Future Laboratory, which "underscored the link between youth and longevity rather than youth and beauty."



While fully inclusive preventative and reparative Skincare is an important place to be now and a necessary step in the evolution of the Anti-Aging Skincare category, as I mentioned yesterday evening during our panel discussion, the future of this category is skin longevity. The concept of skin longevity will shape consumer expectations, product formulations, and ingredient innovations going forward.

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about Deanna Utroske

Deanna Utroske is one of the most well-respected critical thinkers in the cosmetics and personal care industry today. Formerly Editor of CosmeticsDesign.com, Deanna serves the beauty industry as a public speaker, columnist, trade media editor, and consultant. Learn More at DeannaUtroske.com

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Abstract –

The beauty industry is entering a period of rapid transition, moving away from age related aspects of appearance towards a broader understanding of the total functionality of skin. Skin is a complex biological tissue, innervated, protective, tactile and reactive. Skin’s multi-functionality extends into immunity, it is affected by internal factors such as lack of sleep and stress and has a role to play in mood and mental wellbeing.

To achieve a lifetime of total skin health we need to understand the key factors which affect skin throughout consumers ever-increasing lifespan. How does nutrition, fitness, the external environment and the products they use contribute to their skin’s lifestyle legacy. The omnichannel retail and digital environments provide new opportunities for consumer engagement, allowing beauty buyers to use products for optimal effect, reducing product wastage, an important factor for conscious consumers.

The wellness megatrend is driving consumers to view health and wellbeing in a holistic manner providing opportunities for brands and retailers to engage across multiple categories and deliver purpose led solutions not only in terms of appearance but also enhancing quality of life.

The growing aged demographic wants to age well, including skin health and its appearance, whilst the younger population look to use personal care products to support mental health and overcome stress and anxiety.

In this poster we share our latest consumer survey alongside multiple trends and insights which, when analysed, add up to a credible and thought-provoking image of how the future of beauty will be realised.

Keywords –

Futurism; consumer; wellness; science; communication

Introduction –

Beauty is entering a state of rapid transition as it's focus moves away from anti-ageing to healthy ageing. The industry also needs to understand the role it has to play in ensuring new products are purpose led to support global sustainability goals.

To be able to successfully respond to this it is vital to gather and thoughtfully interpret the key trends influencing the direction future beauty will take.

A complete understanding of the needs and behaviours of the future beauty consumer is also required.

This knowledge can then be used to identify the formats and science which will support new product launches mapped to the personal aspirations and goals of the future beauty buyer to guarantee consumer satisfaction, reduce waste and optimise the lifecycle of products ensuring the beauty industry has a sustainable future.

The objective of this project was to gather and distil the key information required to provide a complete understanding of the next generation of beauty products and how they meet consumer needs and sustainability goals whilst simultaneously providing the innovation required to ensure the industry continues to evolve.

Materials and Methods –

Relevant trend and insights information was gathered from a broad variety of resources and critically appraised according to the method described by Rohit Bhargarva [1].

Twelve specific insights will be generated in line with the previously developed Smink trends analysis model –



A large UK based beauty consumer survey has been commissioned with Cutest Ltd Cardiff to generate insights into consumer behaviours and needs and to understand their expectations of what beauty needs to deliver in the future. The results of the survey will be collated by Smink to identify key targets and these will be shared in the final poster (note this survey will take place after June 2022).

Results –

Insights -

Today's beauty consumer is more sophisticated and more demanding than ever before. Top areas to ensure engagement with consumers are – sustainability, personalisation, inclusivity, tutorials and expert guidance and innovation through formats, ingredients and science stories.

The conscious consumer makes buying decisions based around the sustainability and environmental impact of the brands they buy. It has been shown that in the past year conscious consumers are practicing what they preach and paying more for brands which support their personal sustainability goals[2]. Interestingly a recent consumer survey showed that more than 70% of shoppers do not believe that sustainable products need to be more expensive than non-sustainable equivalents[3].

The modern consumer demands that products are a perfect match for them, far beyond the mass-customisation we have seen in the past. Brands are already embracing this, most websites now have at least a basic questionnaire on for example skin and hair, this needs to become increasingly interactive and completely omnichannel in the future to engage and coach the consumer, ensure compliance and drive huge brand loyalty[4].

Inclusivity is fast becoming a given in the FMCG industry and rightly so. Fenty Beauty changed the landscape with its colour cosmetics range featuring a huge shade pallet and we have also seen from P&G packaging which is suitable for visually impaired consumers. This needs to be a continuing and growing trend making beauty accessible to all.

Consumers also have a desire for ever more efficacious products. Improving product efficacy requires the use of innovative ingredients whether they are to optimise the formulation or actives bringing new science stories and claims.

The Wellness industry will have a huge impact on beauty and brings in a holistic viewpoint which will also include physical fitness, mental health and diet. A total approach to beauty which combines all these factors will be the key to success with beauty from within supporting topical application of product to ensure complete body health.

The definition of beauty is constantly evolving as the industry moves away from the tired anti-ageing trope towards a more proactive healthy ageing focus. The global demographic is shifting towards a growing aged population, these consumers want to embrace well-ageing and a life time of skin health. A recent Euromonitor survey showed that the key way beauty is defined in the modern world is through “looking Healthy”, “Being Comfortable in Your Own Skin” and “Inner Confidence”. Indeed the report concluded that “Evolving health and wellness priorities around physical and emotional health point towards consumers seeking authenticity and transparency. The change in values towards a more simplistic and authentic approach will drive consumers to seek products that foster accessibility and purpose.”[5]

There is huge demand on social media for beauty tutorials which coach the consumer in how best to use the products they buy. These also drive compliance ensuring the consumer gets the highest possible efficacy. The digital environment can be very successful in supporting the growth and loyalty of brands being both an expert in the pocket for guidance on product choice and also giving the consumer support throughout their beauty journey. To make the most of social media, digital beauty and the rise of direct to consumer purchases resulting from the global pandemic, beauty retail needs to adapt and embrace the frictionless omnichannel experience. This does not mean that bricks and mortar stores will become irrelevant, more that they will have a different role to play. This is described as one large beauty retailer as the “O+O” opportunity – online and offline. To quote from the press release, “O+O is totally different. It is more about creating an integrated experience to better serve customers’ needs, that enables them to shop across any channel, anytime, anywhere. The motivation behind driving and delivering this new O+O standard is clear, there is no cannibalisation in customers' spending in physical stores. In fact, O+O customer spends 3 times what an instore-only customer shops with us. It's about creating bigger share of wallet and higher customer lifetime value. Retail is not dead; it just needs to be better for our customers.”[6]

Discussion –

The above insights show that the beauty market is rapidly evolving. Consumer power and influence is higher than ever with minority consumer groups now able to leverage huge change in a market place, see by way of example the massive impact veganism (estimated to be around 4% of the UK population) has had not only on the food industry but also the beauty industry.

Brands need to fully understand the goals and needs of a variety of different consumers and engage with them through social media and omnichannel retail. They must also understand the influence that will happen due to the growing interest in wellness and the holistic halo effect that will have.

Conclusion –

The future of the beauty industry is being driven by consumer power and their needs and personal goals, not only in terms of beauty but also including sustainability, health and retail. To win in the future beauty market brands must develop and place in the market products which are purposeful and embrace innovation science and technology across ingredients, formats, skin science and packaging.

Beauty is an industry that demands innovation and new, in the future this must be met in a thoughtful sustainable way.

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Conflict of Interest Statement –

NONE

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