

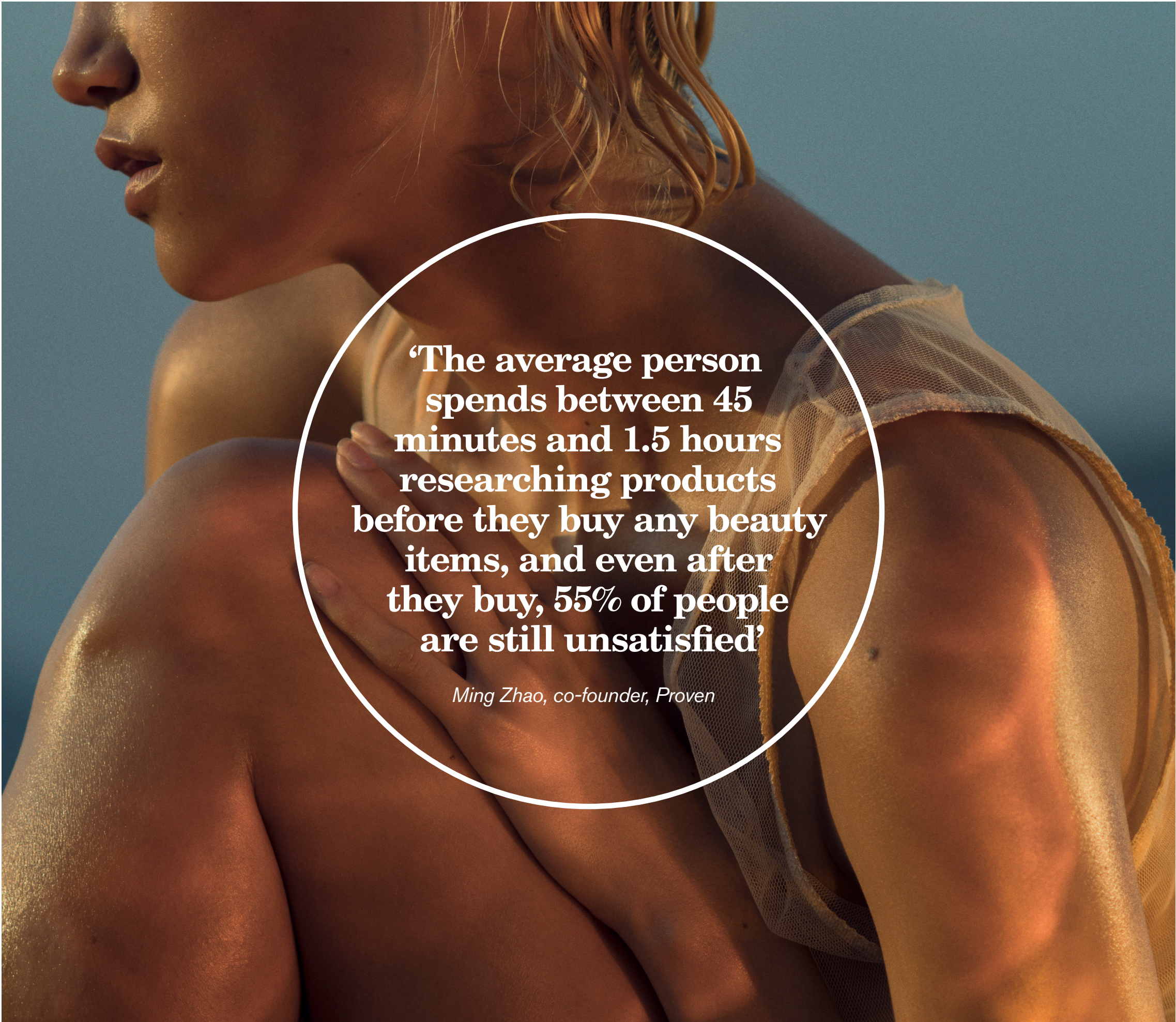
THE : FUTURE : LABORATORY
: : BEAUTY FUTURES 2018



Introduction

Beauty in 2019 will be a tale of two halves. On the one hand the natural and niche will continue to grow, and on the other consumers will further embrace individual expression through make-up and the heavily contoured ideal of Instagram beauty will still reign.

In this report we will explore the smaller shifts that are rippling across the category, from new trends in fragrance such as Anti-perfumes and Affordable Aromas to how the language of facial skincare is affecting other sectors such as bodycare. We also present Algorithmic Beauty, our latest macrotrend that questions whether technology is creating a new objective definition of what is considered beautiful.



‘The average person spends between 45 minutes and 1.5 hours researching products before they buy any beauty items, and even after they buy, 55% of people are still unsatisfied’

Ming Zhao, co-founder, Proven



Trends Rising

From skincare to cosmetics to haircare and fragrance, these are the eight trends that retailers must prepare for in 2019

Cyclical Beauty

As consumers get to know their skin better, they are beginning to understand how external products can interact with their body’s individual cycle.

Brands such as **Amareta** and **Knours** offer beauty products that cater for women’s changing skin during their menstrual cycle. Amareta aims to provide products that support the skin as it adapts to fluctuating oestrogen and progesterone levels across each 28-day cycle, responding to dryness and dullness and to increased oil production.

Knours’ eight-product clean beauty range is accompanied by the **U-Kno** app, which tracks the user’s monthly cycle to analyse her changing beauty needs throughout the month alongside medical insight into skin condition and mood fluctuations. The collection also includes Double Duty Mist, which contains moisturising squalene and jojoba oil. These ingredients naturally sink to the bottom of the bottle, while aloe vera water and botanical extracts rise to the top – users can shake them together to target dry, tired skin or use the water-based ingredients on their own when skin is at its most sensitive.

‘There’s heightened awareness among females that our skin is an organ and we should challenge what we’re letting absorb into our skin.’

Amy Thomson, co-founder of Moody, a digital eco-system for hormones and cycles



Knours, US



Body Hero by Glossier, US

The Body is Back

In the beauty world, bodycare products are often considered an afterthought – a functional but not critical part of consumers’ everyday beauty routine.

Glossier has launched the Body Hero bodycare range, inspired by formulas used to produce facial skincare products. Its Body Hero Duo product, which is inspired by oil cleansers and rich facial creams, is said to ‘clean, hydrate and enhance skin all over’.

‘The look your skin gets is an afterthought for a lot of drugstore creams. It’s more about the moisture they deliver,’ says Glossier CEO Emily Weiss. The brand’s Perfecting Cream product features ‘light-reflecting particles’ similar to those found in facial highlighters and luminisers. ‘Of course, you have to have superior moisture,’ adds Weiss. ‘But what finish will the product leave on your arms, your collar bone, your legs?’

Glossier collaborated with a series of female influencers including Olympic gold medalist Swin Cash Canal, clinical research coordinator Mekdes Mersha and model Paloma Elsesser on a body-positive campaign to promote the range. The imagery depicts a variety of body types and skin tones to celebrate the diversity of women’s bodies.

‘The look your skin gets is an afterthought for a lot of drugstore creams. It’s more about the moisture they deliver’

Emily Weiss, CEO, Glossier



Riley Rose by Linda and Esther Chang, US

Insta-beauty Offline

Instagram has become a thriving environment for cult beauty brands, with 44% of cosmetics and skincare purchases influenced by beauty brands on social media (source: Facebook IQ).

In response, retailers are taking the success of cult beauty brands offline. In September 2017, **Riley Rose** opened as a destination for hard-to-get brands, which have often found popularity on Instagram first. ‘Customers are getting their beauty tips online and are looking for more niche, indie and international brands,’ explains co-founder Linda Chang.

Similarly, the **Bloomingdale’s** in-store beauty boutique **Glowhaus** features products from brands popular on social media. ‘With the rise of niche, socially born brands, it became clear to us that we needed to carve out a new space – to create a sort of incubator,’ says Stacie Borteck, the retailer’s vice-president and divisional merchandise manager of cosmetics.

44%
of cosmetics and
skincare purchases
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brands on social media

Source: Facebook IQ



Cult Hair by Infringe Magazine, photography by Panos Damaskinidis

Colour Refresh

In the US and the UK, fewer than a third of women dye their hair at home, with 27% and 28% doing so, respectively. Concern over chemical ingredients and hair damage have led 40% of women to state that fear is the main reason they don't use such products (source: Financial Times). But new innovations are making it easier than ever to treat yourself at home.

Celebrated hair colourist Josh Wood launched his Josh Wood Colour System in February 2018, which aims to recreate the salon experience. The

colourant kit includes salon-grade gloves, a protective barrier cream, stain-removing wipes and a deep conditioning treatment.

Other companies such as **ModiFace** and **Splat** are using technology to upgrade the at-home routine. The former recently launched a live 3D video hair colour simulator for its partners, giving brands the opportunity to let consumers try on, explore, and ultimately buy, different hair colours and styles in a try-before-you-buy setting. Similarly, Splat's app enables users to try on shades virtually before committing to dyeing.

40%

of women state that fear is the main reason they don't use DIY hair dye kits

Source: Financial Times

Reclaiming Braids

Young black women coming of age are turning away from chemical relaxers and celebrating their identity and heritage through braiding, a hair style steeped in tradition.

In the past few years, the natural hair movement among black women has intensified. In Ghana, European-style hair salons are struggling to fill their salons, according to the BBC, and in the US, chemical relaxer sales in the black haircare market fell by 36.6% between 2012 and 2017 (source: Mintel)

Consequently, braids are now being celebrated as an art form and a sign of resistance. For instance, musician and artist FKA Twigs' first issue of her **AVANTgarden** zine explored hair braiding as a symbol of pride and rebellion among black slaves in the US. 'Cornrows started because slaves would draw maps in the braids describing how to escape the plantations,' FKA Twigs told Dazed. 'I think it's important that we own our heritage and know these things.'



Chroma by Medina Dugger



A N Other, New York

14%
the percentage the
US niche perfume
segment grew in 2017

Source: WWD

Affordable Aromas

Niche perfume sales continue to grow with the segment increasing by 14% in the US in 2017 (source: WWD). New fragrance brands are tapping into the niche premium market, but with a marked down price to appeal to a wider set of consumers.

Floral Street is a range of premium perfumes on sale at a more accessible price point of £55 (\$73, €63) for 50ml. The collection of eight niche scents has been designed around floral notes such as poppy, ylang-ylang and peony. Similarly, **A N Other** launched a range of luxury perfumes, with prices starting at £38 (\$50, €43). The brand bypasses marketing in favour of ingredient formulation. ‘We looked at the cost structure and decided to take the bulk of the money and put it inside the bottle,’ says Gilad Amozeg, co-founder of the brand. ‘This means we can use more expensive and exotic raw ingredients, and eco-friendly materials.’

Anti-perfumes

Anti-perfumes are disrupting the very concept of fine fragrance by capturing scents that draw on decay and disorder.

Etat Libre d’Orange is renowned for its fragrance *Sécrétions Magnifiques*, which draws on the scent of blood, sweat, sperm and saliva. Building on this, the brand will release *I Am Trash/ Les Fleurs du Déchet* in autumn 2018 – the first luxury perfume made from waste. A teaser video by **Ogilvy Paris** features decomposing fruits and flowers that give life to a new bloom, visualising the purity that can emerge from decay.

Even heritage fragrance houses such as **Serge Lutens** are embracing unconventional inspirations drawn from degeneration. Its recent scent *Dent de Lait*, or *Milk Teeth*, bears the smell of milk, almond and metallic notes. ‘It’s like breathing in the comforting scent of childhood, with a hint of foreboding and unease in the background,’ says Refinery29’s senior beauty writer Rachel Krause. ‘It’s a transient state, hovering between something pure and something not so pure... the naïve and the beautiful meet the macabre.’

‘It’s like breathing in the comforting scent of childhood, with a hint of foreboding and unease in the background’

Rachel Krause, senior beauty writer, Refinery29



I AM TRASH / Les Fleurs du Déchet by Ogilvy Paris and Etat Libre d’Orange

The Make-up Movement

In a UK survey by **Ditch the Label**, 75% of respondents aged 13 and over said they think some women would look better if they wore less make-up or none at all, and 27% of respondents said they feel judged for wearing make-up.

In response, brands are championing make-up as a means of self-expression rather than as a tool to cover up flaws. In October 2017, **CoverGirl** retired its 20-year-old slogan Easy, Breezy, Beautiful CoverGirl in favour of I Am What I Make Up. According to the brand, the change was designed to encourage true self-expression and allow customers to unapologetically create any version of themselves through make-up.

Low-cost brand **Sleek MakeUP** is also challenging beauty standards with its initiative, My Face, My Rules. The campaign aims to defend everyone's right to wear as little or as much make-up as they want.

75%

of women aged 13 and over said they think some women would look better if they wore less make-up or none at all

Source: *Ditch the Label*



My Face. My Rules by Sleek MakeUP, UK



Algorithmic Beauty

As beauty technologies gain in popularity, social media, artificial intelligence
and algorithms are beginning to shape a new beauty ideal

Macro Trend: Algorithmic Beauty

From the fin de siècle Gibson Girls, with their tousled hair and athletic bodies representing more liberated women, to war-time pin-up girls used to encourage men to enlist, the feminine beauty ideal is often a mirror on society.

At present, the beauty zeitgeist is championing inclusivity, celebrating a diversity of features and faces. In fact, the number of new shades available in facial cosmetics rose by 22% in the US from 2012 to 2017. Natural beauty brands are also growing at a rapid pace, with the UK market for natural prestige beauty products valued at £124m (\$165.4m, €141.1m) in 2017 (sources: Nielsen, NPD Group).

Yet, at the same time a competing beauty narrative is coming to the fore. Alongside media articles and influencers touting natural beauty products, more and more articles and guides are normalising plastic surgery. **Allure's** new series Life in Plastic aims to explain popular procedures and 'provide all the information [readers] need to make whatever decision is right for [them] – no judgement, just the facts'.

Non-invasive cosmetic procedures are increasingly popular, with the global facial filler market alone predicted to expand at a CAGR of 10.42% to 2023 (source: Research and Markets).

This ideal is not focused on an all-natural beauty, but rather on perfection and flawlessness. And technology is helping us achieve it. There is a 'technological imperative – because we can do more, we think we should do more,' professor Heather Widdows, author of *Perfect Me: Beauty as an Ethical Ideal* and professor of global ethics at the University of Birmingham, tells **LS:N Global**.

And while social media is helping to perpetuate this ideal, as beauty brands increasingly embed technology into their offering, whether it be machine learning apps or connected beauty devices, we will increasingly assess beauty standards not in subjective terms, but objective ones. Are your pores too large? Do your eyes have too many wrinkles? We will trust an app to tell us what our face needs.

As that increasingly becomes the case, there will be a rise in Algorithmic Beauty, where beauty is no longer simply in the eye of the beholder, but in the eye of a machine learning algorithm instead.



Hindsight

Changing beauty standards have been affected not only by social media, but by a generation of beauty consumers who are focused on preventative and effective ingredients rather than reactive skincare regimes.

Selfie-awareness

Our relationship with our self-perceived beauty has been irrevocably altered by the arrival of the selfie. Before everyone had phones in their pockets, the only time they were confronted with their face was in a mirror.

But the prevalence of selfies has led to a new phenomenon of wanting to look more beautiful online than in real life. Indeed, make-up influencers have come to define a new ideal for beauty: heavily contoured, narrow noses and enough foundation to look entirely airbrushed. Make-up products such as Hourglass’s Veil Translucent Setting Powder are reaching cult status because of their perfecting qualities. In an online beauty review one person wrote: ‘It goes on smoothly and invisibly, but leaves behind this ethereal and backlit glow – it’s literally like a soft natural filter and Photoshop in delicate powder form!’

In her book, Perfect Me, Heather Widdows argues that we are reaching a globalised ideal of beauty that is rooted in thinness, smoothness, firmness and youth. ‘Everyone has to fall within a range just to be normal,’ she says.

Indeed, selfies are driving a new wave of cosmetic procedures. The American Academy of Facial Plastic and Reconstructive Surgery (AAFPRS) has found that 55% of plastic surgeons have patients who listed looking better in selfies as a motivation for a procedure, up by 13% from 2016.

55%

of plastic surgeons have patients who listed looking better in selfies as a motivation for a procedure

Source: AAFPRS



Facefixx: Define Beauty



‘There are a lot of barriers when it comes to beauty – not knowing which products are right for you or how to apply them – and technology can help us personalise these decisions for people’

*Guive Balooch, global vice-president,
L'Oréal's Technology Incubator*

Connected beauty

Technology has infiltrated all aspects of life, and beauty has been no exception. Connected beauty devices and at-home analysis tools have proved popular, with the skincare diagnostics market predicted to expand at a CAGR of 11.9% to 2023 (source: Research and Markets).

Smart mirrors, devices and apps are all making the skincare and cosmetics buying process much more of a science than a trial-and-error process. ‘There are a lot of barriers when it comes to beauty – not knowing which products are right for you or how to apply them – and technology can help us personalise these decisions for people,’ explains Guive Balooch, global vice-president of **L'Oréal's** Technology Incubator. ‘The reality is that beauty consumers have much more control of their beauty through technology.’

Facial recognition technology, which has become not only increasingly sophisticated but also more accessible from a price perspective, is also changing consumers' relationships with their beauty regimes. Used in digital diagnostic devices such as **ModiFace's** MakeUp app and **RYNKL's** wrinkle analysis app, it is enabling customers to understand the needs of their face better than ever before.



All Things Beautiful Come From Nature by Blinkink for Waso, Shiseido, Tokyo, Japan

Prejuvenation culture

With a growing acceptance of Total Beauty – the idea that our outer skin health represents our inner health and vice versa – beauty regimes are moving from reactive to proactive.

The demographic that cares about their skin health is getting younger. A survey of 2,000 women in the US found that almost one-third (30%) of those under 35 regularly use anti-wrinkle products, and this includes one in five women under 24 (source: Dermstore). Consequently, more preventative measures are being taken, with consumers buying more into derma-skincare products, which was **Amazon’s** fastest-growing beauty category in March 2017 (source: One Click Retail).

‘Younger, skin-savvy patients come into my office, saying: ‘I’m not going to get older; my skin’s not going to age’,’ says Dr Julia Carroll, a Toronto-based dermatologist. ‘They don’t want anything aggressive, but they want to be ahead of it.’

This phenomenon has been called prejuvenation in the cosmetic surgery field, which is attracting a broader set of consumers than ever before. In the UK, a majority (52%) of women aged 18–24 would consider having a surgical cosmetic procedure, while 39% of men in the same age range would do the same (source: Mintel). And more and more men are now undergoing Botox treatments. For the first time, Allergan, the pharmaceutical company that manufactures Botox, has launched a campaign directly aimed at men.

52%
of UK women aged 18–24
would consider having a
surgical cosmetic procedure

Source: Mintel

Effective tweaks

Consumer interest in injectables comes at a time of greater consumer awareness of skincare products. Skinthusiasts, who tend to investigate ingredients, are in a constant search for more efficacious products.

This may be one of the reasons that Japanese beauty products have been making headlines, finding praise in the media for their efficient formulas that have been rigorously tested in the lab before going to market. J-beauty brand **Pola**, for instance, launched its Wrinkle Shot Medical Serum in 2017 after 15 years in development. It was the first wrinkle cream to be certified by the Japanese Ministry of Health, Labor and Welfare as a quasi-drug, which means it is actively medicated as opposed to cosmetic. Products approved as a quasi-drug allow manufacturers to claim their efficacy on the pack.

This quest for effective products, combined with a desire for prejuvenation, is leading to a rise of tweakments – not quite full plastic surgery, but transdermal treatments that tweak the skin’s appearance. Dr Sarah Tonks, cosmetic physician and founder of **The Lovely Clinic** in London’s Knightsbridge, introduced the Injectable Glow menu earlier this year, which includes three variations of injectable moisturisers, including Profhilo, a stabilised, injectable form of hyaluronic acid that was launched in the UK in 2016. Addressing the reason for the popularity of these tweakments, Dr Tonks told Vogue UK: ‘Put simply, the penetration of topical skincare will always fall short when compared to something that goes under the skin.’



Babor and All Woman Campaign, US

Insight

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As beauty consumers look to science as the new fountain of youth, new trends are emerging that show a convergence of beauty, technology and medicine.

Democratic Devices

High-tech devices that were once the preserve of the dermatologist's office or medical spas are now also making their way into the bathroom cabinet.

'Many of today's women don't want their mother's plastic surgeon or the results,' says Amy Kamin, CEO of **EndyMed**, an Israel-based company that launched an at-home radio frequency device in 2017. 'They want to look like themselves, but they want to see the results at home. Everyone is busy.' The device, Newa, is designed to increase collagen in the skin using radio-frequency energy.

In the past two years, **Neutrogena** has been bringing the dermatology office to a more mainstream consumer. In 2017, it launched a Light Therapy Mask for acne, while this year it introduced a skin diagnostic tool that enables users to read their skin's vital information simply using an attachment to their iPhone's camera. 'It uses the camera and imaging from your phone alongside a 30x magnification lens to capture clinical, laboratory-grade images,' explains

Dr Michael Southall, research director at Neutrogena's parent company Johnson & Johnson. The company is focused on 'making some of these dermatologist-grade technologies available and democratising advanced skincare', adds Sebastian Garcia-Vinyard, group brand director at Neutrogena.

At CES 2018, Swedish company Foreo launched its latest skincare device, the UFO, which combines four professional-grade therapies: LED light therapy, cryotherapy, thermotherapy and T-sonic pulsations to activate its single-use masks to make masking a quicker and more effective process.



Skin360 SkinScanner by Neutrogena, Las Vegas

Mimicry Skincare

With non-invasive procedures becoming routine, there is a new genre of skincare products designed to mimic dermatological and surgical results for those who want the smooth effect without the syringe.

Canadian beauty guru **Nannette de Gaspé** disrupted the industry in 2017 with the launch of her dry masks for the bum and bust. The Uplift collection contains active ingredients that are intended to ‘help recover volume, elasticity and bounce, making the skin appear fuller’, according to the brand.

Now her brand is working on a new line that will have the same effect as mesotherapy – an injection cocktail of vitamins – without the needles. Due to be launched this summer, the masks can ‘deliver where needles inject’, De Gaspé tells The Hollywood Reporter, with ‘no needles, no pain, no bruising, no downtime and a real delivery of actives’.

South Korean beauty brand **Starskin’s** Micro-filler Mask Pack, which mimics the effect of micro-needling, and Spanish brand **Natura Bissé’s** recently launched Inhibit High Definition treatment also take a no-needles approach to beauty. The latter is a system that combines a daily intensive serum with weekly patches to fill wrinkles and smooth expression lines.

‘Many people have reservations about injecting fillers or paralysing agents into their face,’ Patricia Fisas, **Natura Bissé’s** senior vice-president of research and innovation, tells New Beauty. ‘These products offer an alternative for people who want noticeable results but in a more natural way.’

‘Many people have reservations about injecting fillers or paralysing agents into their face’

Patricia Fisas, senior vice-president of research and innovation, Natura Bissé



The new skincare experts

Alongside skincare that mimics cosmetic procedures, this desire for results makes the beauty retail landscape fruitful for science-backed skincare brands. **Net-A-Porter** has found that sales of doctor-founded skincare brands were up by an average of 127%, with brands by female doctors up 200% (source: WWD).

But a new generation of medically supported skincare is emerging, with doctors from outside fields now launching skincare lines based on their specialisms. German professor **Augustinus Bader**, the director of applied stem cell biology and cell technology at the University of Leipzig,

has used his research in stem cells to inform his new eponymous luxury skincare brand. The two-product line, *The Cream* and *The Rich Cream*, uses Bader’s medical research into burns victims to back up claims that it can help reverse the signs of ageing through stem cell repair.

MZ Skin by oculoplastic surgeon Dr Maryam Zamani aims to replace the clinical aesthetic of a doctor-founded brand with a luxurious sensory experience and aesthetic. ‘MZ Skin was conceived from a desire to make a precise, concise, intelligent capsule collection of scientifically backed, clinically trialled skincare that is easy to use but also has a gorgeous sensory component to it,’ Dr Zamani tells LS:N Global.

While most doctor-based brands tend to be sold in doctors’ surgeries or pharmacies, her focus was to address this void in the market of a luxury skincare brand founded by a female physician.

127%
the year-on-year increase
in sales of doctor-founded
skincare brands

Source: WWD



The Future Of Skincare is here, Augustinus Bader



Christopher Hanna salon, Bridge Street, Sydney

Tweakment Salons

Beauty treatments are no longer confined to the vanity table or the spa. Increasingly, aesthetic treatments are seen as part of a person’s regular upkeep, and medical spas are becoming popular sites for consumers seeking to upgrade their look.

Medical spa (med spa) revenues are predicted to grow by 8% in the US between 2017 and 2022, with facial fillers and aesthetician services among the top revenue-generating treatments. Among the visitors to medical spas in 2017, Millennials accounted for 17% of patients, who visited as part of a prejuvenation routine (source: The American Med Spa Association (AmSpa). ‘The younger Millennial population has shown a willingness to spend money on themselves, their appearance and experiences,’ says Alex Thiersch, founder and director of **AmSpa**.

In April 2018, the **New York Dermatology Group** (NYDG) opened a 7,000-square-foot integral health and wellness wing in its office building. Founder Dr David Colbert insists the space, which is dedicated to preventative wellness, is not a spa. ‘We are a wellness clinic staffed by board-certified physicians who went to medical school,’ he tells **Vogue US**. Visitors are paired with a physician who oversees any aesthetic treatment.

In Sydney, the **Christopher Hanna Salon** offers the typical hair services alongside cosmetic procedures such as fillers. In April 2018, it opened a bar to create a more convivial space. ‘This a place where people are pampered to the max,’ says Sam Badawi, co-founder of the salon. ‘Everything just flows, from the food to the treatment to the cocktails.’

Machine Perfect

Artificial intelligence will not only change how we assess our faces, but will also help to create a personalised feedback loop between products and their efficacy on an individual's skin. Previously, personalised beauty products tended to be based on relatively simplistic surveys, without any way to track whether the personalised suggestions were working.

Proven is a start-up that aims to tackle this problem by using deep learning algorithms to filter through 8m skincare product reviews, 20,000 ingredients and 100,000 products in order to identify patterns and trends to determine the right products for the right skin type.

‘The average person spends between 45 minutes and 1.5 hours researching products before they buy any beauty products, and even after they buy based on the research that they’re able to do, 55% of people are still unsatisfied post-purchase,’ says Ming Zhao, co-founder of Proven.

But as consumers become used to feeding their data to an algorithm for recommendations, the next step will be to have a constant relationship with that algorithm, which will keep track of their whole beauty routine.

The MIT-based start-up **Atolla Skin Lab** offers a glimpse of what this cyclical regime might look like. Founded by Nava Haghighi, Sid Salvi and Meghan Maupin, the company

begins by gathering skin data from an individual in person – such as moisture levels, oil levels and lifestyle factors – and feeds it into their machine learning algorithm to create customised facial oils. Crucially, the relationship does not end there. The team continues to monitor a person’s skin, and tweak the formula as needed. ‘A lot of skincare companies stop at the point that they sell the product to someone,’ says Maupin. ‘They don’t measure the efficacy on an individual level to assess whether that product’s working for someone.’

‘A lot of skincare companies stop at the point that they sell the product to someone. They don’t measure the efficacy on an individual level to assess whether that product’s working for someone’

Source: Meghan Maupin, co-founder, Atolla Skin Lab





Visual by Nicolas Garnier for The Future Laboratory

Algorithmic Tutorials

The rise of smart beauty devices means our appearance is now being judged by machines rather than people.

New technologies are being used to objectively scan a user's face to give them advice. **Warby Parker** recently incorporated smart glasses sizing in its app. Taking advantage of **Apple's** new TrueDepth camera, available only on the iPhone X, the app reads the contours of a user's face in order to create a 3D depth map.

One can imagine how this technology might translate to the beauty market, with tutorial apps only becoming more accurate and personalised. **Wow How** is one brand demonstrating this with its app that uses facial recognition technology to take into account face shape, skin tone and individual facial features before providing bespoke make-up tutorials.

Similarly, in late 2017, **Shiseido** acquired **Giaran**, an AI company whose technology is being used to create virtual make-up try-ons, tutorials and personalised recommendations. The company will then use the data to inform their own product development.

Speaking about the current beauty consumer, who is keen to experiment, Jill Scalamandre, president of Shiseido's Global Makeup Center of Excellence, told WWD: 'We're learning about her – we're learning about different facial structures, different skin tones, different shade preferences – it's a two-way street. It's enabling us for product development and it's enabling her to experiment.'

'We're learning about [the current beauty consumer]. We're learning about different facial structures, skin tones, shade preferences – it's a two-way street. It's enabling us for product development and it's enabling her to experiment'

Jill Scalamandre, president of Shiseido's Global Makeup Center of Excellence

Foresight

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In the future, algorithmic beauty will give rise to new technologies that will help the drive for flawless skin, new conversations about the face as a site for data-gathering, and shifts in self-perceived beauty ideals.

Nanotech Beauty

The next generation of proactive beauty consumers will expect their products to be driven by technological innovation as much as new ingredient formulations.

While lasers and acid peels are now popular remedies in the quest for smoother, rejuvenated skin, the development of deeply penetrative biotechnology means that the next generation of non-invasive procedures will be rooted in nanotechnology.

‘I think acids, peels and lasers are on a path to zero,’ explains Brandon Truaxe, founder of beauty group **Deciem**. ‘Biotechnology is evolving at an exponential pace and now we are able to create peptides that act as deep penetration delivery systems, allowing products to interact with our body’s cells.’

An Israeli team of scientists from Bar-Ilan University have developed a technology that can miniaturise hyaluronic acid, which has a molecular structure that is too large to penetrate any deeper than the first layer of skin.

The formula shows the potential to create an anti-ageing cream that could have the same effect as injectables.

In New Zealand, fishing company **Sanford** announced a collaboration with nanotechnology company **Revolution Fibres** to bring to market a nanofibre face mask made from discarded skins of the hoki fish. Revolution Fibres produced the material by using ‘sonic electrospinning’ to turn the fish skin’s collagen into a thin nanomaterial that is easily absorbed into the skin, as opposed to a traditional face mask that sits on top of the first layer and is a relatively inefficient way to deliver products to the dermis.



Marble Universe by Daniel Danielsson for LUSH Cosmetics

A new interface

With the increasing sophistication of facial recognition technology, the face is becoming a point of transaction. ‘We’re at the intersection of face plus technology,’ says Nicola Moulton, beauty and health director at Vogue. Moulton suggests we might start ‘moving away from thinking about our faces solely in terms of beauty and instead consider them as an extension of our digital devices’.

For the beauty world that means that while the focus has so often been on how to perfect the face – help people smooth wrinkles or achieve that enviable glow – in the future, the focus could be on how to read the face in order to make better products for it.

This is already evident at a practical marketing level. In July 2017, for instance, **Smashbox** collaborated with **ModiFace** on its virtual try-on app MakeUp to use eye-tracking technology to discover what products users were most interested in.

But this could be taken a step further. Consider the **Mercedes-Benz Fit & Healthy** concept car presented at CES in 2017. The car had sensors and a monitoring system so that it could adjust the temperature, sound, lighting and even scent in response to a driver’s health.

Could the next-generation smart mirror simply read people’s faces to let them know they are tired and what next steps are needed? Right now, algorithmic beauty is in its early diagnostic stages, but the next step could be to create beauty solutions that alter not only a person’s face but his or her mood.

Objective Beauty Backlash

While technology will continue to shape our perception of beauty, the homogenisation of what is considered beautiful will also lead to some consumers seeking a more inclusive beauty.

In Asian markets, where plastic surgery is widely accepted, the pendulum is already beginning to swing back. In China, the word *gaojilian*, which translates as ‘noble face’, has become a popular term among Chinese Millennials to denote a new beauty ideal. According to Dao Nguyen of *Jing Daily*, the term encapsulates this generation’s ‘desire to understand beauty in a more diverse, inclusive way, defined by attitude rather than sheer physical attributes’. ‘Very importantly, a noble face does not depend on make-up for significant transformation, nor does it diminish with age.’

Similarly, in South Korea, which has the world’s highest per capita rate of plastic surgery procedures according to a key estimate, there has been an increasing backlash against the widespread popularity of plastic surgery. In November 2017, the Seoul Metro station announced it would no longer show adverts for plastic surgery owing to public complaints. ‘Much of the ideal [beauty] is industrialised. It’s being created by the beauty industry, by K-pop [Korean pop music], perhaps even by the government, in what they’re selling to the rest of the world as to the ideal Korean beauty,’ says Heather Willoughby, a professor of women’s and cultural studies at Seoul’s Ewha Womans University. Commenting on the new regulation, she added: ‘Seeing less of it or seeing greater diversity is a much better and much healthier thing.’

Professor Heather Widdows, author of *Perfect Me*, believes any reaction will have to be widespread in order to have any impact. ‘As we increasingly live in a visual and virtual culture, and as beauty matters more, there may be some backlash, but it would have to be dramatic and on a large scale to alter current trajectories.’

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Professor Heather Widdows, author of Perfect Me



Bart Hess for Aesop



The Spa of Unconscious Desires by Bompas & Parr for Mondrian Hotel, London

Lab Notes

1. Digital tools are altering consumers' perception of beauty.

Snapchat and Instagram filters may seem innocuous, but are creating a skewed sense of self, where it is more important to be beautiful online than in real life. Plan your product and marketing strategies carefully to address both aspects of your customers' personalities.

2. Non-invasive aesthetic procedures are becoming routine.

Beauty treatments are no longer confined to the dressing table or the spa. Consider how you can become best placed to integrate into this hybrid space.

3. Beauty consumers are looking for expert influencers.

While dermatologist brands are still popular, emerging science-backed brands need to have a unique point of view to differentiate themselves, and female doctors are becoming a popular voice of expertise.

4. Facial recognition technology will change the face of beauty.

Think about how developments in smartphone cameras could help give consumers a more accurate map of their face, which will enable them to receive more customised advice than ever before.

5. Be a companion on your customers' skincare journey.

Machine learning and algorithms can help offer a feedback loop for consumers looking to improve their skin quality, and will help build a long-term relationship with your customers.

Do you dare to know what the future holds?

This report is based on research from our Beauty sector on The Future Laboratory's trends intelligence platform, LS:N Global.

Did you know that LS:N Global members get free access to all of our trend reports?

We can also deliver our research to your business in a number of ways, from in-house presentations to strategic workshops and bespoke reports.

If you are interested in becoming a member, or if you want to find out more about our Strategic Foresight services, get in touch at hello@thefuturelaboratory.com.

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