

BEAUTY'S NEW AGE: THREE MOVEMENTS SET TO DEFINE WHAT IT MEANS TO BE WELL AND FEEL GOOD

In recent years, the definition of beauty has evolved from a notion of aesthetic pleasantness to a broader consideration of inner balance and psychological well-being. Amid challenging climates rooted in political tension, recession and environmental crises, pathologies linked to stress have recently soared.

In search for reassurance, consumers are turning to beauty to help them heighten their sense of self-awareness and craft their own well-being, and a newfound awareness of psychological and emotional states is becoming ever-more woven into the beauty category. Indeed, with life today having been described as a state of “perma- crisis,” it’s no surprise that consumers are feeling burnt out.

As one response, consumers are seeking out beauty and personal care that offers more profound experiences and that goes beyond the aesthetic, amplifying the effects of the time that they spend on themselves. They are avidly turning to beauty products and routines that can enhance their well-being, improve their psychological health, address stress, and quiet a racing mind. In Nielsen IQ’s report “The 2022 State of Consumers” released in January, surveys found that over half of respondents consider mental health and stress management to be top priority, with 65% responding that mental wellness was “one of the areas that will be most important to (them) in the next 12 months,” while stress management, relaxation, and sleep ranked as the fourth most-popular response, chosen by 59% of those surveyed. This prioritizing of mental health is translating into a holistic approach to beauty, as brands actively seek to lift consumers’ mood and spirit. At BEAUTYSTREAMS, we have identified

three key movements set to define the future of holistic beauty within the next three years, how this translates on the beauty market today and what this may entail for its future.

COGNITIVE WELLNESS: LEVERAGING MENTAL WELL-BEING

With the perma-crisis in mind, we can expect consumers to increasingly look for ways to lift their mood and manage their emotions. Stimulation via color, texture, fragrance, and safe, mood-altering ingredients can offer consumers moments of healthy relaxation, engagement, or escape. There will likely be opportunities for brands to expand their cosmetic product offer toward a broader definition of beauty that addresses brain health and well-being. From a brand and product development point of view, as beauty is a highly emotional territory, being able to measure the tangible benefits of color, texture, and fragrance on the brain could represent a tremendous competitive advantage for brands. Colors, shapes, textures, and even fragrances have been proven to affect one’s mood and play an important part in a brand’s overall desirability. While external stimuli remains key in evaluating a product or brand, experts are also exploring the rise of microdosing and its role in the beauty industry. Andrew Hessel, Co-Founder





and Co-Executive Director of the Genome Project-Write, explains that *“in the past ten years, numerous biotechnological innovations stemming from psychedelics have been deemed promising.”* With mental health on the forefront of global conversations today, micro-dosed psychedelics are pushing the boundaries of cognitive wellness and its translation into the beauty industry.

Microdosing: Beauty’s New Frontier

That consumers are seeking a psychological and spiritual dimension to wellness and beauty treatments should perhaps come as no surprise, against the backdrop of a pandemic, war, and geo-political upheaval that has left many feeling out of control of their lives. Indeed, as of 2020, personal care and beauty represented \$955 billion of the \$4.4 trillion global wellness economy, according to the Global Wellness Institute, indicating the intertwining of these two spheres. Alexia Inge, Co-Founder and Co-CEO of the forward-thinking e-commerce site Cult Beauty, echoes the view that consumers are seeking beauty that benefits them on a psychological level and expects to see a shift toward “emotional beauty,” or “emo beauty.” *“Efficacious brands that market themselves by mood will be the hot tickets,”* Inge says. *“Whether through an anti-anxiety CBD-infused body oil, defragging reiki-ed face mist, energy-boosting transdermal vitamin patch, or spirit enhancing aromatherapeutic mask, consumers are looking to infuse emotional support into the products they buy.”*

One potential source of that emotional support is psychedelics, which are creating buzz in mental health for their potential in treating various psychological conditions. There’s also scope for them to make their way into beauty and wellness, to create feelings of well-being

and counteract low mood. While spa-like treatment centers such as Fieldtrip which operates in the United States, Canada, and Amsterdam, offer ketamine-assisted therapy under professional supervision, there’s an opportunity for psychedelics – in microdoses – to make their way into at-home beauty and wellness. Jennifer Pereira, Founder of The Bloom Fund, which “connects psychedelic healing with leadership” explains that she’d like to see innovations such as “a fungi face cream infused with psilocybin that is easily absorbed and could be healing from the inside out.” Among brands that are planning to experiment with psychedelics is Supermush, a U.S.-based company that currently offers oral sprays for “energy, immunity, and chill” infused with different types of functional mushrooms. The brand has launched the Microdosing Collective, a non-profit collective focused on psilocybin and microdosing, with the aim of shaping U.S. public policy around microdosing and wellness. *“We hope to reframe a lot of the microdosing supplements out there as wellness supplements,”* Supermush’s Co-Founder Alli Schaper explains. *“A lot of people think that psychedelics are going to become legalized for consumer use. That’s not the path. It’s only macrodoses at service centers. So we’re starting this microdosing collective to raise awareness and education specifically around microdosing.”*

Fragrance: A Mood-Boosting Favorite

As another path to euphoria, fragrance has always been a long-time, trusted friend. While the term “aromatherapy” may seem esoteric and antiquated for some, the sense of feeling better and enhancing brain function thanks to scent is more relevant today than ever. Studies show that scent has true benefits for mood and memory. According to data from Mood Media, a U.S. in-store media solutions company, 75% of all emotions generated every day are due to smell, and our mood is improved by 40% when



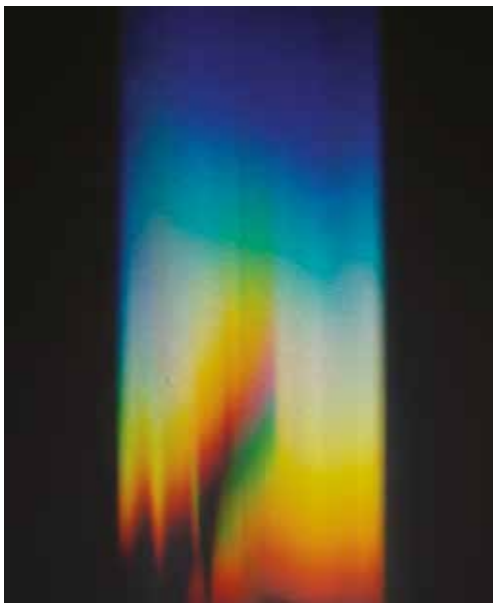
exposed to scent. Additionally, we are 100 times more likely to remember something we smell over something we perceive with other senses.

One of the brands embracing fragrance’s mood-altering abilities is Australia’s One Seed perfumes. Named after emotions, and explicitly linking fragrance and mood, the brand’s scents look to pinpoint a scent to an emotion. The brand’s Hope scent creates a feeling of “being overcome by emotion at nature’s beauty; [a] sweeping landscape of wonder and hope,” with its blend of blonde woods, bergamot, violet petals, mimosa, frankincense, and orris root. The Solitude eau de parfum, meanwhile, reframes alone time by embracing it, celebrating “all that we gain from some time spent alone. Solitary and yet at ease in the wilderness, like a well-cared for woodland cabin. Strong, sturdy, comforting.” It combines notes of black pepper, dry woods, tarragon, pale vanilla, ambrette seed, tonka bean, and orris root. And for a taste of nature’s therapeutic, rejuvenating effects in olfactory form, a calming forest bath is evoked in Heretic Parfum’s Dirty Hinoki plant-based eau de parfum. The brand says that its blend of grounding Hinoki woods and crushed herbs create “an earthy and ethereal plant-based scent that’s a Japanese ‘forest bath’ in a bottle.”

What’s Next for Cognitive Wellness?

At BEAUTYSTREAMS, we look at societal movements and translate these into

beauty forecasts. From a long-range, five-year outlook to a here-and-now perspective, we forecast consumer shifts, cross-category trends, and ideate concepts to guide our clients in product development and marketing strategy. Analyzing what consumers want today and what they will look for tomorrow, our team of expert analysts have predicted some of the product concepts we can expect to see hitting the market of cognitive wellness.



Chromotherapy for Mind and Body

As consumers become more health-conscious, they are adopting a more holistic approach to their physical, emotional, and mental well-being. With this in mind, consumers are turning to lifestyle and mindfulness habits that nourish the mind, body, and soul.

The practice of color therapy, which uses the frequency and vibrations of color, can be traced back to ancient Egypt, Greece, China, and India.

This therapy has effects not only on the mind, mood, and cognitive function but can also take on an integral role in the healing of mental and physical ailments.

This concept sees colored light therapy re-emerge as a contemporary alternative therapy. As a therapeutic tool, chromotherapy harnesses the

power of color to act on physical, mental, emotional, and energetic levels. By massaging pressure points on the head and body, a chromotherapeutic tool's color emits vibrations that propagate with a resonance effect and trigger hormones such as dopamine, endorphins, serotonin, and oxytocin. This creates a sense of enhanced happiness, health, and well-being. Each color offers different effects that act on both physical and mental levels.

Wearable Fragrance Temporary Tattoos

Digital and biometric technology, olfactory research, and neuroscience now all combine to create new ways of experiencing scents. This new technology makes it possible to awaken emotions, connecting wellness and scent. Fragrance industry research proves that fragrances can affect mood, boost productivity, change physiology, aid sleep, and modify human behavior. Fragrance is increasingly being used as a wellness tool to modulate emotions and mental health. Wearable tech solutions promise to open to a whole new world of possibilities for personalized fragrances, ways of monitoring mental health, and improving well-being. The future of olfactory-enhanced wellbeing may be in the form of temporary tattoos embedded with wearable motion sensors, which detect and monitor the user's emotional state. Working as an emotional tracker that monitors vital signs, it indicates the user's moods such as joy, contentment,

sadness, tension, and distress. Then, the biosensors trigger the release of a personalized cloud of scent designed to improve the wearer's well-being at the optimal moment. The temporary, biosensor digital tattoo adheres to the skin with water and lasts for seven days.

HEALTH-NURTURING: A WHOLESOME APPROACH TO BEAUTY

Consumers have long understood that there are true beauty and well-being benefits to taking a holistic approach to health. This movement is expected to scale up in the coming years, driven by an increasing number of aging populations, limited access to health care in some regions, and imbalanced diets. There is an opportunity for health and beauty supplements to compensate for the effect of poor diets, and to help consumers to live longer and healthier lives. Other territories to watch are skin health devices and trackers, as this market is forecasted to benefit from double-digit growth, alongside personalized products and experiences as well as brain training, another fast-growing category that expands physical health toward intellectual health. Today as part of this movement, brands are tapping into treatments that draw on ancestral and holistic medicine, from adaptogenic herbs to super-ingredient actives, to taking inspiration from the phases of the moon, to create a feeling of well-being and being grounded in one's body.

Traditional Chinese Medicine: Ancestry Meets Modernity

As part of the holistic beauty movement, brands are integrating ancestrally recognized ingredients to modern science to create efficacious and health-enhancing beauty allies. Beauty brand Karuna launched its Balancing Collection at Whole Foods in the United States in February of last year, and its collection draws on Ayurveda, adaptogens,



Traditional Chinese Medicine (TCM), and modern science to create products that “act in synergy with your body,” the brand says. Its Illuminate Face Oil blends adaptogens for glow, with mandelic acid for radiance, and algae and willow bark extract for antioxidant protection. Linda Wang, Founder and CEO of Karuna Skin, states that “combining both clinically studied ingredients and those that come from a holistic background like TCM and Ayurveda is so important when it comes to achieving skin balance and results,” she said. “[These ingredients’] powerful anti-inflammatory properties work wonders in skin care to help get stressed-out skin back to a balanced, high-performing state.”

Holistically Efficacious Ingredient Actives

On an ingredient level, cosmetic active ingredient company Lipotrue’s active ingredient range Telessence is formulated to “tackle the three types of stress that accelerate biological aging,” the company says, namely environmental, physical, and emotional. The “emotional” ingredient, Telessence Breeztel, is a marine ferment derived from a microorganism collected, the brand says, “from the sea breeze” near Tonga, Fiji. Lipotrue says this topical ingredient addresses the signs of emotional stress in the skin, as it “modulates SP and cortisol release, preventing the cell from biological aging that occurs through telomeres shortening.” This action, Lipotrue says, “de-emostresses” the skin by restoring and repairing epidermal and dermal emotional balance.



What’s Next for Health-Nurturing Beauty Trends?

Taking witness of the convergence of health and beauty, BEAUTYSTREAMS identified expanding health and wellness-related beauty trends expected to take flight in the next few years.

360-Degree Workout Recovery

The beauty, wellness, and fitness sectors are converging. Going to the gym, taking fitness classes, and working out have become central to consumers’ routines, as they view beauty through a broad lens that encompasses healthy living, physical appearance, and overall holistic well-being. Within this active lifestyle, recovery is an important part of the workout process. Thus, beauty and wellness products that address the needs of recovery during the different phases of a workout session provide an opportunity for brands to be part of consumers’ rising obsession with fitness and wellness. An example of such a concept is a recovery-based, holistic wellness line comprising supplements, cosme-to-textile, and topical products, specifically designed to be used before, during, and after a workout to enhance physical endurance, relieve muscles soreness, and promote faster recovery.

Double-Action Eye Beautifier

Since smartphones, tablets, and laptops have become commonplace, consumers’ digital screen time has increased exponentially, often leading to dry and fatigued eyes. Excessive screen time can also impact eyes’ ability to focus, eye function, and vision longevity. In addition, the poor air quality in cities worldwide and constant exposure to this contaminated air means eye problems caused by pollution are increasing. This can cause a number of eye conditions such as allergies, irritation, redness, itchiness, watering, strain, and blurring. UV rays can have damaging effects on the eyes, too, and speed up the progression

of age-related macular degeneration (AMD). In addition, overexposure to blue and UV light can lead to dark circles and premature aging around the eyes, while air pollutants can cause under-eye pigmentation and puffiness. Healing eye sensitivity, we identified that a conceptual supplement, developed in collaboration with ophthalmic surgeons, that supports the health of eyes both from the inside and out to relieve strain as well as dry, sore, red, or itchy eyes. With the ever-growing use of screens on a daily basis, this is an opportunity worth tapping into.

PRIVATE HAVEN: CREATING A FEEL-GOOD BUBBLE

As (semi-) remote lifestyles mean consumers spend more time at home, building a comfortable and cozy environment becomes increasingly important. Thinking about the home as an intimate eco-system and, in a certain way, an extension of our bodies, signals that beauty has the potential to further evolve into other domains related to home care and well-being at large.

Experiences that create deep physical and mental relaxation via beauty tech, and products that enhance sexual wellness, will benefit from the Private Haven movement. The evolution of fragrance towards scent being a vehicle for well-being and self-care will continue to attract consumers who are constantly craving stress release.



Self-Care Defined by Intentional Rituals

Creating meaningful and intentional routines has been key for consumers in maintaining their mental health in check throughout the chaotic last few years. As a brand describing itself as “an emotionally intelligent, ritual-based beauty brand,” Selfmade is a U.S. brand that notes that its aim is that “through the formation of intentional habits, our product routine nurtures not only the physical self but also inspires confidence and worthiness.” Its three products span skin care to intimate care. The brand’s Secure Attachment Comfort Serum + is a hydrating serum and primer formulated to repair skin’s moisture barrier and address signs of skin stress. This is thanks to its ingredient Cortinhib G, derived from the helichrysum italicum flower, which Selfmade says is clinically proven to reduce cortisol levels and reinforce the skin’s barrier. The brand directly links the serum to the psychological aspect of self-care: it says the serum is named as it promotes secure attachment, “a.k.a. a feeling of safety and comfort with yourself – and best of all your skin.” Linking the internal and the external, the brand points out that “finding safety in your emotional world (hint – exploring your attachment style) will ultimately lower levels of the stress hormone cortisol,” which Selfmade says translates to “less water loss and more hydration for your skin.”

Reveling in the Scents of Home

London fragrance brand Vyrao’s fragrances, incense, and candles are created by Founder Yasmin Sewell with wellness and energetic medicine in mind. The scents are presented in terms of

what emotions they will inspire in the wearer. The brand notes that “scent is such a potent tool for well-being because our sense of smell is processed by the part of the brain where memories are made and emotions are processed,” Vyrao says, adding that “at Vyrao we use ingredients specifically chosen to weave feelings with the highest vibration into each scent.” Among the brand’s recent launches is its Rose Marie Candle, created to inspire “self-love.” Its notes include rose for self-love, violet leaf absolute for self-expression, patchouli for grounding, and guaiac wood for energy clearing. To amplify the candle’s effects, it includes a talisman which the brand describes as being “super charged with energy” by quantum energist Louise Mita.

What’s Next for the Private Haven Movement?

Exploring home-based concepts that tap into mental wellness and holistic beauty, our team of experts identified opportunities worth zooming in on.

Smart Home Circadian Fragrance System

Guarding our natural circadian rhythm is important for overall health and well-being. The human circadian system is regulated by a master clock found in the brain which runs on a roughly 24-hour cycle and is reset each day according to lightness and darkness. Sunlight is the primary signal for the body clock. The rising of the sun tells the body and brain that it is time to be awake; the setting of the sun tells the body it is time to prepare for sleep. The circadian rhythm also influences the olfactory system – the sense of smell may fluctuate in sensitivity over the course of 24 hours, in tune with

the circadian timing. Working with the sense of smell’s natural rhythm can help to resynchronize the well-being clock to be in line with the natural circadian cycle. As a means of pairing up the olfactory system and the circadian rhythm, a connected home fragrance system integrated into the ventilation or air conditioning system that emits specially designed fragrance doses is a concept worth noting. Releasing specific scents strategically throughout the day, this concept allies physiological factors with olfactory attributes for an all-day sense of wellbeing.

Indoor Air and Skin Purifier

Most of the air we breathe is indoors where we spend 90% of our lives. While pollution outside is commonly discussed, indoor air pollution is still underestimated. Indoor pollution significantly influences our general health, affecting the lungs, throat, gut, and eyes, but also our skin health. Studies found that skin aging and damage can be linked to exposure to indoor air pollution, resulting in skin conditions like eczema, psoriasis, atopic dermatitis, acne, and, in some cases, skin cancer. To filter pollutants from the spaces where we spend most of our days and improve skin health and beauty, all-in-one air purifying pods are the future of holistic beauty.



About BEAUTYSTREAMS

BEAUTYSTREAMS is the global beauty industry reference and an indispensable resource for beauty industry professionals. Catering to industry insiders across the full beauty supply chain, BEAUTYSTREAMS provides future insights, product forecasts, consumer analyses, and market intelligence on a global level as well as on a local scale across six continents.

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