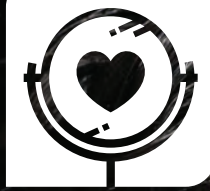


# WTF



WHAT THE **FUTURE** | VOL2 N02



## BEAUTY

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**PLUS:** We ask 19,000 people “What is beauty” in a new Ipsos Global Advisor survey  
PAGE 16



# A complicated portrait of beauty

“Real beauty is inner beauty, that’s true,” the Dalai Lama surprised many when he said in a recent BBC interview “But with human beings, I think the appearance is also important.”

He was talking about the potential for a female Dalai Lama and suggesting that to qualify for the role she needs to be attractive and “spend money on makeup.” It wasn’t the first time he’s made comments like those but it appears to be the first time he (sort of) apologized.

Regardless, his comments touch on a central tension in this issue of **What the Future**. On the one hand, many are pushing for an expanded idea of “beauty.” The world is an incredibly diverse place, so the notion of one idealized sense of beauty seems antiquated. That is especially true for younger generations, who are increasingly of mixed race, mixed culture and accepting of fluid genders, and see these things as non-issues. It’s just the olds who are having a hard time adapting.

At the same time, as the Dalai Lama inelegantly points out, and Ipsos research confirms, it takes time to move an antiquated standard. “Ideals” still very much exist across nations and cultures. The chart on the next page is part of a new Ipsos Global Advisor survey on beauty standards, replicating the 2004 survey that inspired the Dove “Real Beauty” campaign. As we further explore on page 16, it’s clear that beauty inclusivity still has ground to cover.

Beauty, of course, is big business. There is momentum toward inclusivity, but also sustainability, natural ingredients and the increasing use of technology in the retail process and environment. For big beauty companies long focused on simplicity and scale, this is a lot to consider and incorporate into marketing, product development and channel relationships.

Technology creates another key challenge. Artificial intelligence and other developments help customers craft new “looks” in the real world that they can portray in the virtual world. People can experiment faster, cheaper and easier using mobile or in-store apps to see how different shades, styles and even eye shapes will change their appearance.

Taking advantage of these changes are boutique grooming and cosmetics firms that are carving out niches and segmenting customers in ways that threaten the traditional players. Big beauty businesses, in turn, are cherry-picking the startups and acquiring them, as Procter & Gamble has done with Walker and Co., and Estee Lauder has done with Glamglow and Smashbox.

**“The beauty behemoths are seeing that they, too, can do disruptive innovation.”**

The beauty behemoths are seeing that they, too, can do disruptive innovation. They are the ones with the research and development muscle to create and pivot at any scale they wish. It becomes a matter of reading the trends with enough agility to get in front of them. Likewise, these players must pay attention to micro-trends alongside the full-scale macro trends that traditionally drove profits.

Thankfully, trend watching is easier today than ever before — but even that creates a challenge. The big beauty brands used to define “beauty” in centralized ways — if one decided that a certain shade was *the thing* that year, it became the thing. Now, with the proliferation of social media, bloggers, vloggers and insta-influencers, the definitions of beauty trends become more personal and distributed. This diminished influence of the big players poses an existential challenge, but it’s offset by the incredibly powerful real-time window that companies have into the different consumer opinions out there. It’s just that real-time moves very quickly, and adjusting to it takes focus, effort and, of course, research.

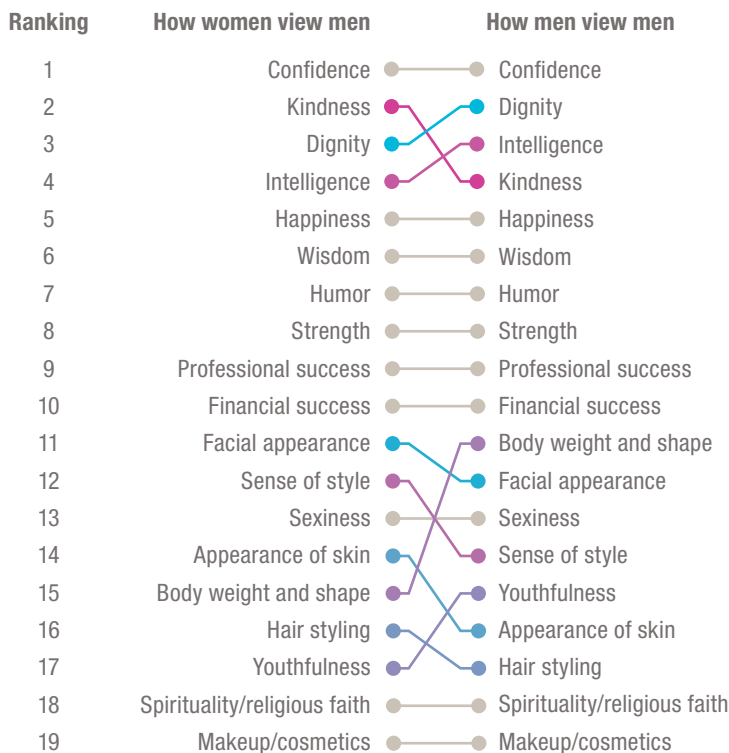
Which leads us to our final tension, and one that doesn’t get nearly enough attention. In a world where everyone can be beautiful, there’s a pressure for everyone to be beautiful. We see that tension measured in Instagram likes, but also in the rise of teenage suicides. We see that tension in the selfie-taking sense of virtual beauty but also in the rise of plastic surgery. We see that tension in the plethora of new shades of foundation but also in the filters that morph us all into the same wide-eyed, smooth-skinned cat-eared caricatures.

Where will all of these tensions net out? To get at those answers, we have to ask a lot of big questions. The implications of the answers will matter to humans everywhere and to the companies wishing to help them on their journey. The foundational question, of course, is: Will beauty continue to be in the eye of the beholder, or will beauty be something that we each get to define and own for ourselves?

*Oscar Yuan is the president of Ipsos Strategy3.*

## Ideal beauty is consistent, but still gendered

Men and women in 27 nations were asked to rate these attributes in terms of what makes a man or woman beautiful. This is how they ranked.



(Source: Ipsos Global Advisor survey conducted between April 19 and May 3, 2019 among 19,029 adults in 27 countries.)

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**Julia Clark** is a communications and research expert who leads Ipsos’ Marketing and Communications team for the North America business. Julia oversees external and internal communications; brand elevation; global, regional, and domestic marketing strategies; and reputation cultivation and management. She is a nonpartisan polling expert, providing commentary on political, social and electoral issues in both the U.S. and U.K. media. She reports on the role of the arts in beauty on page 31. Her favorite beauty product is a French hair-smoothing system called Cezanne.



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**Carla Flamer** is President, Service Line Lead, Market Strategy & Understanding for Ipsos in Canada. Carla began her career with Procter & Gamble, working in most of the company’s product areas over a six-year period. Carla joined Ipsos 25 years ago and manages Ipsos Canada’s practices focused on business strategy, branding, segmentation, shopper and innovation. She examines global research about beauty routines on page 19. Her favourite beauty products are her adorable makeup blending sponges.



**Mallory Newall** is a Research Director within Ipsos’ public polling practice, where she specializes in issues-based research, messaging research, and designing research for public consumption. She works with public and private sector clients, including NPR, USA Today and the U.S. Chamber of Commerce. She has appeared as a commentator on Newsy, NPR, and the BBC. She writes about body image on page 15. Mallory loves an in-depth skin-care regimen, but if she had to pick her must-have products, they would be vitamin C serum and a good sunscreen.



**Oscar Yuan** is President of Ipsos Strategy3, where he oversees the growth and strategic direction of the firm. He leads select client engagements in marketing, brand and innovation strategy, for industries ranging from travel and hospitality, to retail and consumer goods. Previously he was a founding Partner at Kantar Vermeer. A frequent speaker and commentator on brands and brand-building, Oscar has appeared as a guest on CNBC and NPR and is a contributor to the Financial Times, BusinessWeek and Fortune. Oscar introduces the Beauty issue on page 2. His favorite grooming product is Lab Series BB Tinted Moisturizer SPF 35.



# Question: Are natural and clean beauty products scalable?



**R. Alexandra Keith**

**Chief Executive Officer,  
Procter & Gamble Beauty**

**Alex Keith has concerns that many startup and boutique beauty brands don't.**

Procter & Gamble is a big company with big brands. Items billed as natural, clean or organic are all the rage with some shoppers. But are these products really better for the environment or the consumer? When Keith thinks **What the Future**, she's thinking about the interdependence of sustainability, natural and clean.

**WTF: Is it enough to talk about natural and clean beauty?**

Alex Keith: There's a lot of discussion about natural beauty and clean beauty, but here at P&G Beauty we've really started to think about it much more broadly as responsible beauty. It's not just about natural and clean, it's about the safety, quality, efficacy and sustainability of the products. These things are critically important to be a responsible beauty company, but they don't necessarily result in each other — they're independent, yet need to be considered interdependently.



**“If the entire industry switched to organic and natural materials, it would be a problem for the Earth and for food sources.”**

**WTF: What do you mean by “interdependently”?**

Keith: It’s a bit of a Venn diagram. There are overlapping spaces between natural and clean beauty and sustainability. But they’re not entirely overlapping, and they could sometimes be at odds with each other. For instance, if you’re not sourcing natural ingredients in a responsible way, that can have a negative impact on sustainability.

**WTF: I would imagine that at P&G’s scale, if you decided to use Costa Rican volcanic clay in a product, that could very well decimate Costa Rica.**

Keith: Because of our scale it’s very important that we have this responsible beauty platform that we have established. I think it’s something that the industry needs to take a good hard look at. If the entire industry switched to organic and natural materials, it would be a problem for the Earth and for food sources.

**WTF: Can you give an example of ways you address that?**

Keith: We partnered with Royal Botanic Gardens, Kew in London, the world’s foremost expert on plant and botanical science and their benefits on human life. They are helping us to authenticate the botanicals we’re using in our products as responsibly sourced applications with meaningful levels in the product.

**WTF: You mention it’s an industrywide problem, that not everything can be “natural.”**

Keith: The good news in this survey is that not every consumer is demanding purely natural and organic products. The interest level is certainly going up, but as we look at it there are certain things that I would call must-haves for consumers in this space. Getting all the way to completely natural and organic still remains a smaller part of the market.

**WTF: That’s got to be a tricky thing to communicate to the consumer: Be careful what you wish for.**

Keith: In many cases people are searching for more natural solutions because they think they’ll be safer. But nature isn’t always safe. We do a lot of safety testing on our ingredients in our finished product formulations because sometimes ingredients that might be safe on their own, if not formulated correctly, end up not being safe and being irritants.

**WTF: What were some of your takeaways from the survey?**

Keith: While some consumers are looking for a natural product, they are also looking for a product that works. If you want to label products “natural” you need to be able to call out ingredients that actually occur in nature. That’s why the authentication

we’re going through with Kew is so important for the consumer.

**WTF: What else?**

Keith: For instance, amongst African-ancestry consumers, the interest in naturals in the beauty spaces is significantly higher. Through a hair-care lens, that mix makes inherent sense because of the rituals that these consumers have gone through with their hair for years. The chemical [mix] necessary to [create] some of the transformations that they desire, maybe first to straighten their hair and now to make it go back to natural again — these type of things can be very harsh processes.

**WTF: While people do prefer brands that they know and trust over new brands, the survey shows that the idea of “natural” can be a tipping point where people say they would try a new brand.**

Keith: It’s obviously true, because the markets are fragmenting, and many of these new brands are gaining momentum with consumers.

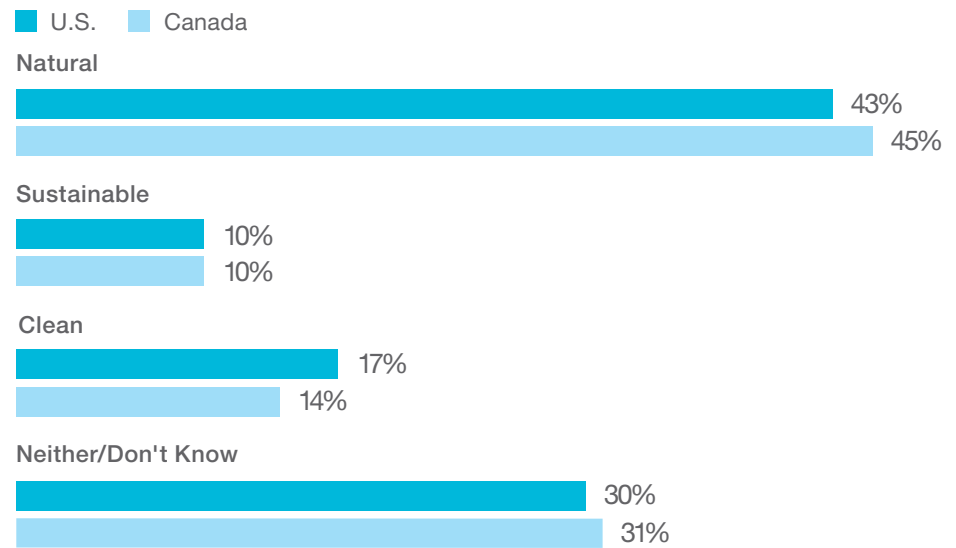
**WTF: How do you think some of these results will change, and how do you think this landscape will play out in the coming years?**

Keith: I don’t think [terms like natural and clean] are going to go away. I think they



## The 'natural' label is still a big driver in beauty, as in other product types.

Thinking about your favorite face, body, hair or beauty care items, are you more likely to purchase items that are labeled ...?



(Source: Ipsos survey conducted between May 16 and 20, 2019 among 1,201 adults in the U.S. and between June 19 and 21, 2019 among 1,003 adults in Canada.)

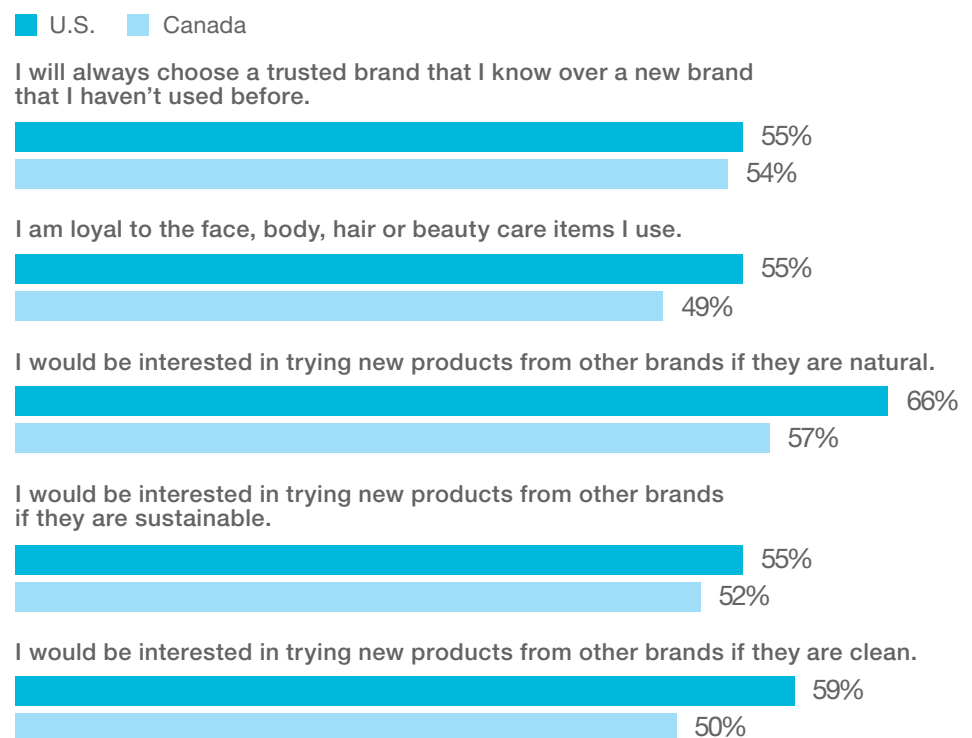
are part of the general wellness trend that is happening in the world across food and vacations and everything. The question is how big it becomes in the beauty space. I think it's going to be linked to the authenticity of the offerings. Ultimately the onus is on the manufacturers to help this segment grow by providing products that work. The good news is this consumer is engaged and wants to learn.

### WTF: How has the definition of beauty changed over your career, and how do you see that continuing to evolve moving forward?

Keith: If I think back to when I started my career in beauty in the early '90s; there was such an idealized thinking of what everybody ought to look like. Now certainly it's moving much more to [how] each person can be "the best me." I think that social media will continue not to create ideal states per se but create aspirations for certain different micro-tribes, for lack of a better word, especially with Gen Z girls. The hardcore definitions of what beauty is, just like almost everything in our world today, becoming a lot more fluid and a lot more self-defined. People feel more in control of what they want to be and how to achieve that.

## 'Natural' can be a tipping point in beauty brand defection.

Please indicate the extent to which you agree or disagree with the following statements as they relate to face, body, hair or beauty care items (agree net.)



(Source: Ipsos survey conducted between May 16 and 20, 2019 among 1,201 adults in the U.S. and between June 19 and 21, 2019 among 1,003 adults in Canada.)



# Question: How will South Korean and Pan-Asian beauty culture shape North American beauty culture?



**S. Hejin Lee**

**Assistant professor of  
Social and Cultural Analysis,  
New York University**

From South Korean boy band BTS' world domination, to the ubiquitous facial sheet masks at retail beauty counters, the global influence of the Korean culture wave known as Hallyu is growing, says S. Hejin Lee.

Lee is an author and assistant professor of Social and Cultural Analysis at New York University. When Lee thinks **What the Future**, she wonders how South Korean and Pan-Asian culture and beauty will shape broader North American beauty culture.

# 38%

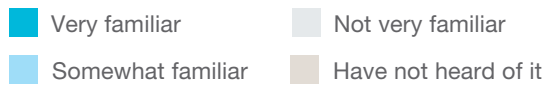
of adults 18-34 are familiar with K-beauty, compared to 15% of adults ages 35-54 and 5% of those age 55 and older.

(Source: Ipsos survey conducted July 2 to 4, 2019, among 1,208 U.S. adults.)



## Familiarity with K-beauty is low in the U.S. and Canada.

Please indicate how familiar you are, if at all, with each of the following things.

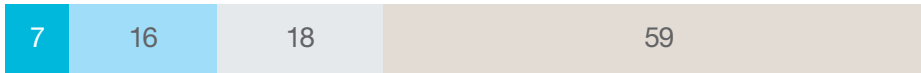


### Percent U.S.

#### K-beauty (silicon sheet masks, snail mucin, 10-step regimen)



#### K-pop (Psy, BlackPink, BTS)



#### J-beauty (4-step regimen with second hydration essence, cleansing oil)



### Percent Canada

#### K-beauty (silicon sheet masks, snail mucin, 10-step regimen)



#### K-pop (Psy, BlackPink, BTS)



#### J-beauty (4-step regimen with second hydration essence, cleansing oil)



(Source: Ipsos survey conducted July 2 to 4, 2019, among 1,208 U.S. adults and July 5 to July 10 among 1,000 adults in Canada)

**WTF: Korean beauty and Korean pop culture are rather intertwined. While their influence is growing in North America, awareness is still fairly low overall. What did the survey data tell you about the potential for K-beauty here?**

S. Heijin Lee: One is that it's obviously very generational. The respondents who really know about K-pop, K-beauty and Pan-Asian culture in general are the 18-to-34 demographic. K-beauty, before 2012 in the U.S., was a kind of underground thing. In addition to Asians, the fan base is largely people of color. What that signals to me is that youth of color in the U.S. are really looking for alternatives to mainstream American pop culture to see themselves reflected in what

they're listening to and watching. Lastly, male respondents [in the survey] seem to really know about K-beauty and K-pop. The only thing that I could think is that in the U.S., K-beauty and K-pop are really popular with LGBTQ folks. There are all kinds of subcultural pockets of K-pop fans, and it means different things for these different groups.

**WTF: As these people age, do you see Hallyu and K-beauty being more of a fad in North America or do you think they have staying power?**

Lee: Subculture is a key word and a way to think about how K-pop and, adjacently, how K-beauty is popular in the U.S. We don't want to attribute too much power to

it and say that everyone knows about it and everyone's doing it. But of those Americans or Canadians that are, they're very hardcore about it. They may not necessarily be listening to K-pop anymore. But they will have been exposed to the idea of buying something from Korea or elsewhere. That's exactly how K-pop is designed. Your favorite pop star is going to be the face of your favorite K-beauty products. But also the face of an automobile line, a bag line, a clothes line and even water heaters. It creates a brand loyalty, and that's what will continue to grow.

**WTF: When it comes to K-beauty specifically, are you seeing Korean beauty ideals being increasingly adopted on this continent in the future?**

Lee: The shift is that skin care is now a priority for young people. We really think of youth as acne products or Neutrogena, that kind of thing for teenagers or for early 20s that's in their price range. The thing that American and European companies usually use to sell their products is convenience: "Use this one product and it will do everything." Korean companies are reversing this and saying, "You have to do these 12 steps to improve your skin." This idea that you work really hard to achieve something, this is a very Korean work ethic. Brighter, creamy, dewy — those adjectives weren't necessarily part of the conversation before. That's what Korean or Asian beauty is bringing into the mainstream discourse about beauty.

**WTF: As technology shapes beauty standards, one tension we see is the role technology plays in helping us craft custom looks for ourselves in reality while also in presenting us with a more homogenous, filter-driven virtual self. Where do you see this going, and what does it mean for future beauty standards?**

Lee: A lot of these critiques revolve around the idea about a natural self vs. an artificial self, and that technology helped us get to this artificial self. But coded in that debate is the idea that the natural self is always seemingly better and that we should love our natural self. Humans have always manipulated how they look through piercings, jewelry and makeup. What is alarming is reports that people are taking

**“Brighter, creamy, dewy — those adjectives weren’t necessarily part of the conversation before. That’s what Korean or Asian beauty is bringing into the mainstream discourse about beauty.”**

their filtered selves to the plastic surgeon and asking to be remade as such permanently. What that points out to us is that beauty standards are about something that is seemingly more perfect than what you have. The thing to be wary of is not necessarily the technology, but the kind of slippery slope of what we have available to us, or what gets marketed that says, “I can make you look like that.”

**WTF: The female K-pop aesthetic uses the schoolgirl image while male K-pop idols have a softer form of masculinity. That’s challenging feminist and masculine ideals. What does that mean for the future culturally, especially now with MeToo?**

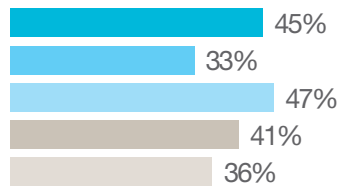
Lee: Korea is in a full-blown MeToo moment as well. There’s definitely the sort of innocent, doe-eyed schoolgirl aesthetic component of K-pop girl groups. But there are also the Girl Crush groups that are the kind of bad-ass, edgy, outspoken, in-your-face girls. The soft masculinity is maybe the most noticeable thing for us in the U.S., and that’s because soft masculinity is in such stark contrast with how we think about hetero male aesthetics. In the U.S. the heteronormative male culture is pretty strong. “Queer Eye” is as soft as it’s gotten here.

## K-beauty most influences beauty routines for Millennials.

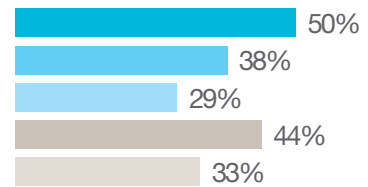
Please indicate the extent to which you agree or disagree with the following statements.

■ U.S. 18-34 ■ U.S. 35-54 ■ U.S. 55+ ■ U.S. total ■ Canada total

I follow a multi-step beauty regimen but don't care where the products come from.



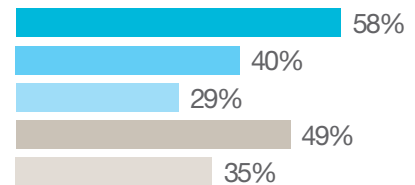
I like beauty products from South Korea.



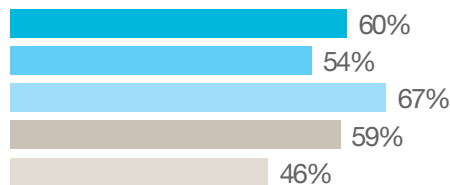
I stick with one product and am loyal to it.



I like beauty products from Japan.



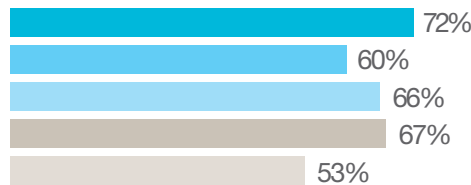
I am committed to a long-term beauty philosophy.



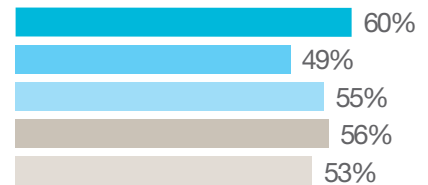
I am interested in quick results from my beauty routine.



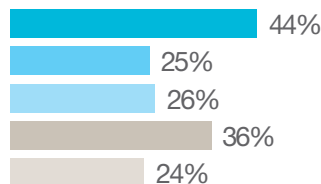
I like to customize my skin products and ingredients as needed.



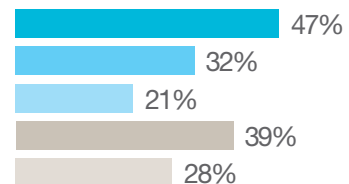
It's important that my skin is really clean, dewy and glass-like.



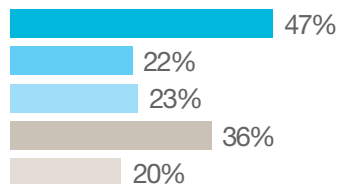
I take my beauty cues from American hip-hop culture.



The most advanced cosmetics come from South Korea.



I take my beauty cues from K-pop.



(Source: Ipsos survey conducted July 2 to 4, 2019, among 1,208 U.S. adults and July 5 to July 10 among 1,000 adults in Canada)

# What do boy bands have to do with beauty?

## The social media conversation around Korean beauty (K-beauty) spiked in April. It had nothing to do with a new snail treatment.

An analysis performed by Ipsos' Synthesio social listening platform makes clear that the uptick had everything to do with BTS. The boy band sensation from South Korea performed on "Saturday Night Live" in April and sold out stadiums on a brief tour of the U.S. in May.

The study used the new Signals module, which combines AI with social listening to quickly show trends and correlations between conversations. It quantifies how the huge swings in conversation were based on two factors. First, there is an undeniable relationship between Korean culture and Korean beauty and their influence on the global beauty landscape.

During the period measured, there was a particularly high volume of conversation surrounding the Korean sheet mask brand Mediheal due to its association with BTS.

Another sub-trend in K-beauty is its adoption by men. That chatter was boosted by the BTS tour, but the subsequent rapid fall-off shows that the bump was likely an outlier and the conversation dipped quickly back to growing at a more slow and steady rate.

Taking the BTS-driven posts out of the analysis, we see that facial masks account for nearly half of the discussion, followed by cleansers with the male beauty discussion hovering around 10%. A single viral post about short hair vs. long hair drew more than 10 million interactions. Interestingly, the research demonstrated that the social

conversation about K-beauty dropped off significantly on weekends.

Further, despite broad influence from Asian beauty culture on global trends, the social conversation is completely dominated by K-beauty over Japanese beauty, or J-beauty.

Overall, this demonstrates the heavy role of influencers in generating buzz about beauty brands — unexpectedly, even among men. In this space, a celebrity endorsement (at least of a BTS caliber) can escalate brand mentions. Increased top-of-mind awareness lends itself to higher consideration and purchase behavior.

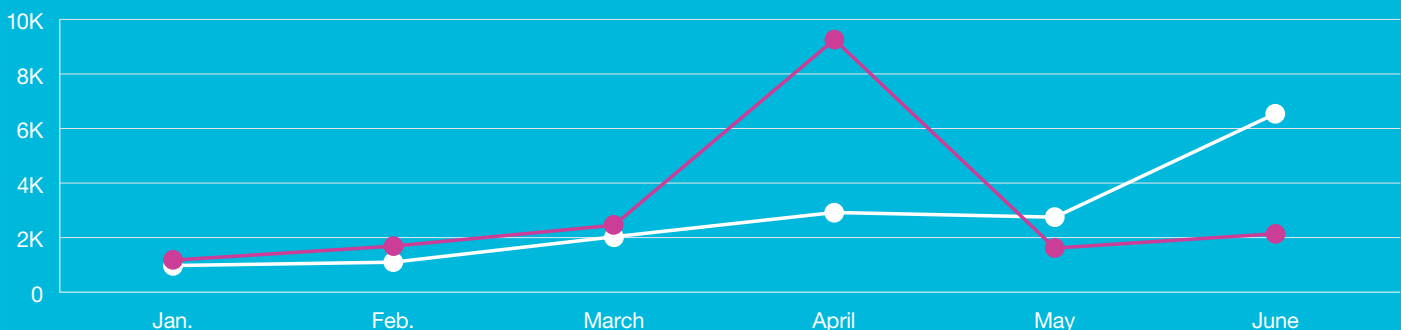
As beauty trends move faster and faster, tools like social listening can help brands keep up and adapt in the moment.

*Kristy Click is a Client Officer at Ipsos.*

## The BTS effect

Men's K-beauty appears to be a fad that peaks in April and can be attributed to the conversations surrounding BTS. However, conversations around cleansers have been steadily increasing and can be considered a growing trend.

■ For men ■ Cleansers



(Source: Synthesio analysis of K-beauty social media conversations.)



**Question:**

Can beauty truly be inclusive?



**Anastasia Garcia**

**Fashion photographer  
and body diversity  
advocate**

**Anastasia Garcia creates images featuring women across the spectrum of shapes, sizes, races, ages and abilities.**

Her work has been featured for brands including Chromat, Amazon and Lane Bryant and in the documentary “Straight/ Curve” about the body image crisis in fashion. When she thinks **What the Future**, she asks, “What if we eliminated beauty standards?”

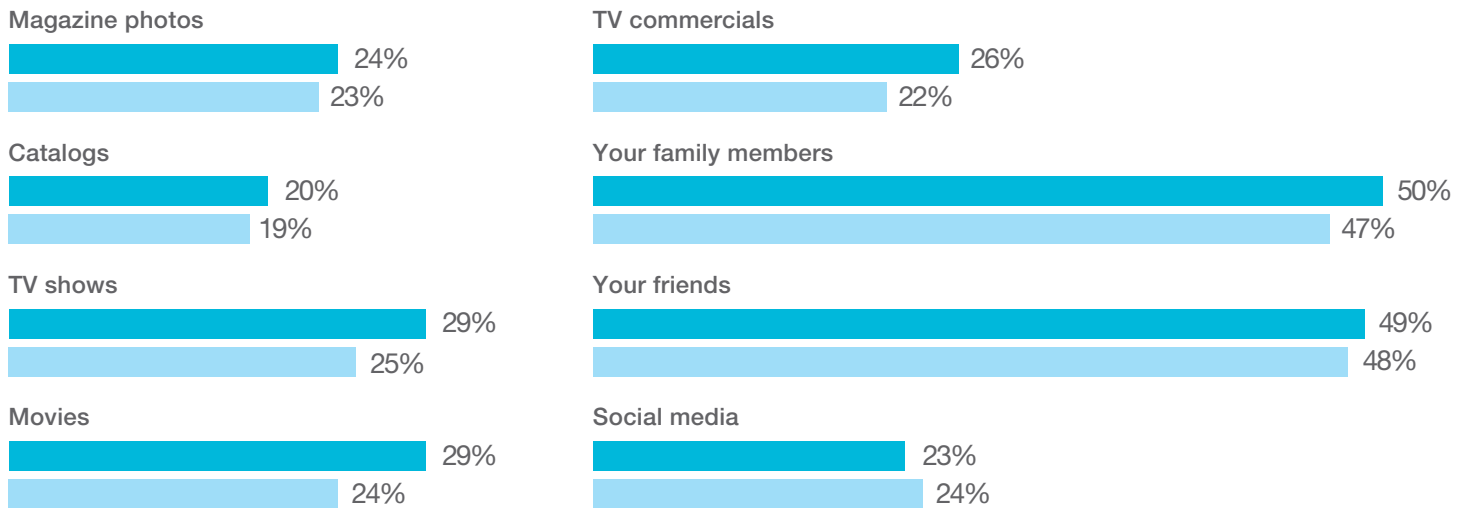
**WTF: What makes beauty standards problematic?**

Anastasia Garcia: Because now and historically there’s been such a narrow idea of what beauty is, at least as it’s portrayed through film, television, in the fashion industry and in magazines. That has really harmed our mental health (particularly women’s). How does it look when we eliminate the idea of “the perfect body” and begin to celebrate the wide range of the human form? Maybe if we did that, people wouldn’t constantly feel like they have to do extreme things to attain an unrealistic ideal.

# Family and friends have an outsized impact on our ideas of beauty.

To what extent do the following influence your idea of what makes a person beautiful? (agree net)

■ U.S. ■ Canada



(Source: Ipsos survey conducted between May 16 and 20, 2019 among 1,201 adults in the U.S. and between June 19 and 21, 2019 among 1,003 adults in Canada.)

## WTF: Should health factor into beauty standards?

Garcia: What is health? Should health matter when it comes to representation? The most common hurtful things I hear as a fat woman come from people who claim to care about my health. “You’re promoting obesity, and obesity is unhealthy,” is the most common response. Body positivity is for everyone. Some people will never be healthy. Some people have a chronic illness. They have a disability, whatever it may be. Does it mean that they’re any less beautiful? Does that make them less worthy of representation? No.

## WTF: So, if everybody is beautiful what does beauty mean?

Garcia: What a wonderful question. To be defined simply by one’s outward appearance is problematic because beauty doesn’t necessarily correlate specifically to the way someone looks. Beauty is about somebody’s heart. It’s about somebody’s kindness, their spirit. It’s determined by the way somebody moves through the world as much as it is about how they look. Beauty is just such an abstract thing. What is beautiful to me may not be beautiful to you. That’s exactly why we must open the range of what is celebrated as beautiful.

## WTF: What did the results of our survey tell you about beauty standards?

Garcia: It says that our family members and friends are the most influential in how we define beauty. If anything, it’s become apparent to me, working in the body positive space, the deep impact that particularly mothers have on their daughters. Mothers directly influence how daughters will perceive their own bodies and their own beauty. But what is informing their mothers? The idea of what’s beautiful between my mom’s generation and mine has shifted significantly. So, there’s something else that’s informing the beauty ideal, and I’m really curious what that is.

## WTF: What do you think will drive beauty standards in the future?

Garcia: I see the future of media coming directly to people through their phones, even more so as time progresses. Social media is going to play a larger part in that, more so than traditional media.

## WTF: How will that influence what we consider beautiful?

Garcia: On the one hand, I find the concept of curating your best life moments and then Facetuning them and creating a picture of this perfect life really problematic. Another part

of me sees women honestly baring their bodies, showing their scars and their stretch marks or their acne and being honest about disabilities. A lot of the fat influencers, fat bloggers and plus-size models sharing those images and being authentic are really inspiring people to reclaim their own narrative. It’s showing them that they’re not alone. As a result, I’m seeing more brands committing to limited retouching and honest representation. I’m a board member of an organization called Consider the Image, which is committed to creating imagery that isn’t so manipulated. I hope more of that will continue on social media.

## WTF: Do you think brands are starting to see that body diversity is profitable?

Garcia: In the past, the idea was that if you told people they weren’t good enough, by creating this aspirational messaging, they would constantly be spending money buying your product to try and be good enough. But the truth is, you don’t have to make people feel like crap to buy a product. If you celebrate people, they’re going to want to buy into that product. And companies like [lingerie retailer] Aerie have had a very successful run of being more inclusive and showing stretch marks and bellies are seeing massive financial growth; they’re a pretty good example of that.

**WTF: Will we see more plus-size beauty models in the future?**

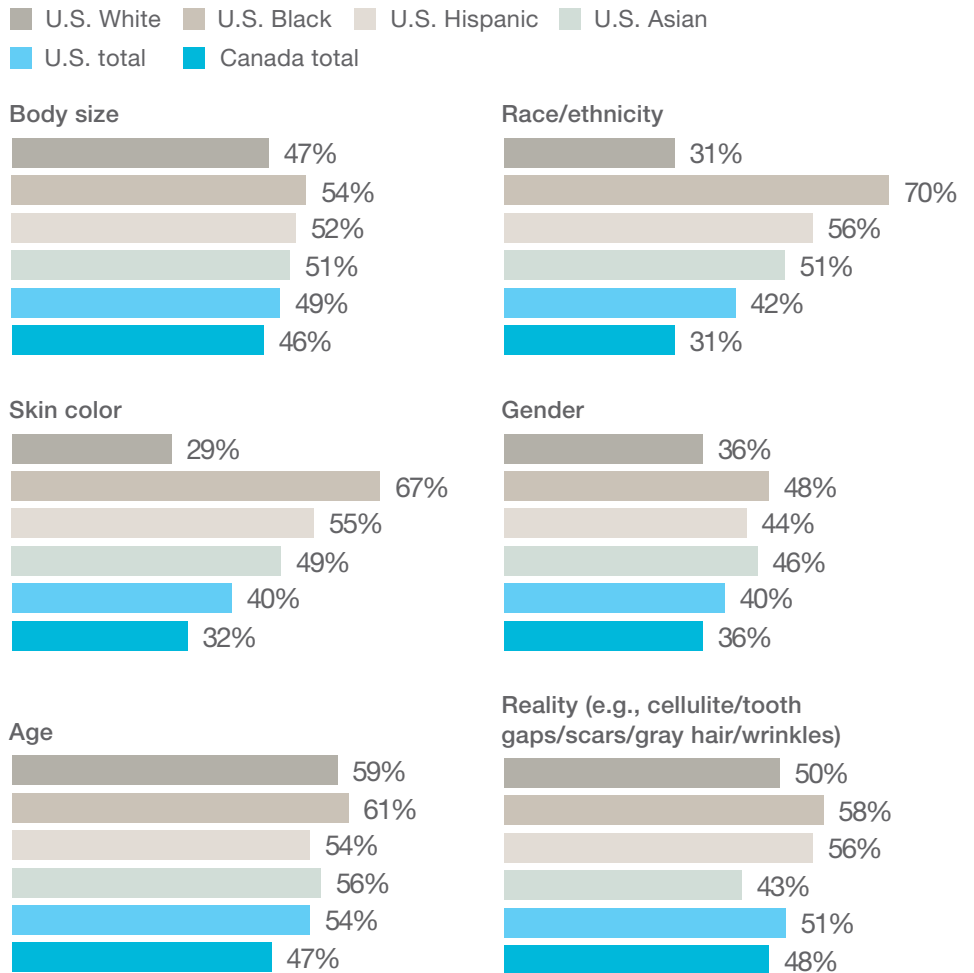
Garcia: Sephora has started to do it, which has been amazing. I've loved seeing Revlon collaborate with [plus-size model] Ashley Graham. Fat women wear makeup. Fat women buy makeup. And plus-size models look incredible in beauty campaigns. Why aren't beauty companies celebrating that? Because of fat phobia? Hopefully we're able to continue to put the pressure on, and that continues to change. Because your body type, age, race, ability, sexual or gender orientation should have zero bearing on how beauty products are worn or sold.

**WTF: What are you seeing now that's signaling the future of beauty?**

Garcia: It's hard for me to see past the implications of our political climate, but I hope that the future is one where women are empowered, celebrated and able to have bodily autonomy and autonomy over their appearance. Where people of color are celebrated, respected, paid equally and have the same opportunities. Where people respect gender identity and gender fluidity—and where trans people, especially trans women of color, aren't killed simply for trying to express their gender identity. To me these don't seem like hopes, but these are my hopes.

Black, Hispanic and Asian people have stronger reactions to seeing people like them in the media.

I feel beautiful when the people with ... like me are portrayed in a positive way in advertising and media.



(Source: Ipsos survey conducted between May 16 and 20, 2019 among 1,201 adults in the U.S. and between June 19 and 21, 2019 among 1,003 adults in Canada.)

**“Some people will never be healthy. Some people have a chronic illness. They have a disability, whatever it may be. Does it mean that they’re any less beautiful? Does that make them less worthy of representation?”**





# Are you feeling included in beauty inclusivity?

This issue features messages of body positivity from Alex Keith, Anastasia Garcia and others. We are seeing more variations of humans in ads and the media. The definition of “beauty” is, arguably, expanding. While we might see these changes all around us, are we really feeling beautiful ourselves?

Ipsos conducted a survey for RiverMend Health that shows that many of us are not. When asked about situations in which we feel “dissatisfied” with our bodies, only one in five reports always feeling satisfied.

In contrast, nearly twice as many people — and more than twice as many women — report feeling dissatisfied when they look in the mirror.

Though women continue to be dissatisfied with their bodies in greater numbers than men, there are underlying signs that men feel just as much pressure to conform to the ideal body type. Eight in 10 Americans agree that as many men as woman want to change their weight. There are also signs that things may be changing with the youngest generation. In a separate study conducted in late 2017 among tweens age 10 to 13, roughly one in three said they “love their body the way it is” and wouldn’t change any part of it even if they needed only to wave a magic wand to do so.

Part of the issue is that while the definition of beauty is expanding, it’s still evolving. In the RiverMend survey, people still consider an athletic frame to be the “perfect body.” Only 20% think the “dad bod” is the right fit for men. This is true throughout the globe, as you’ll see starting on page 16.

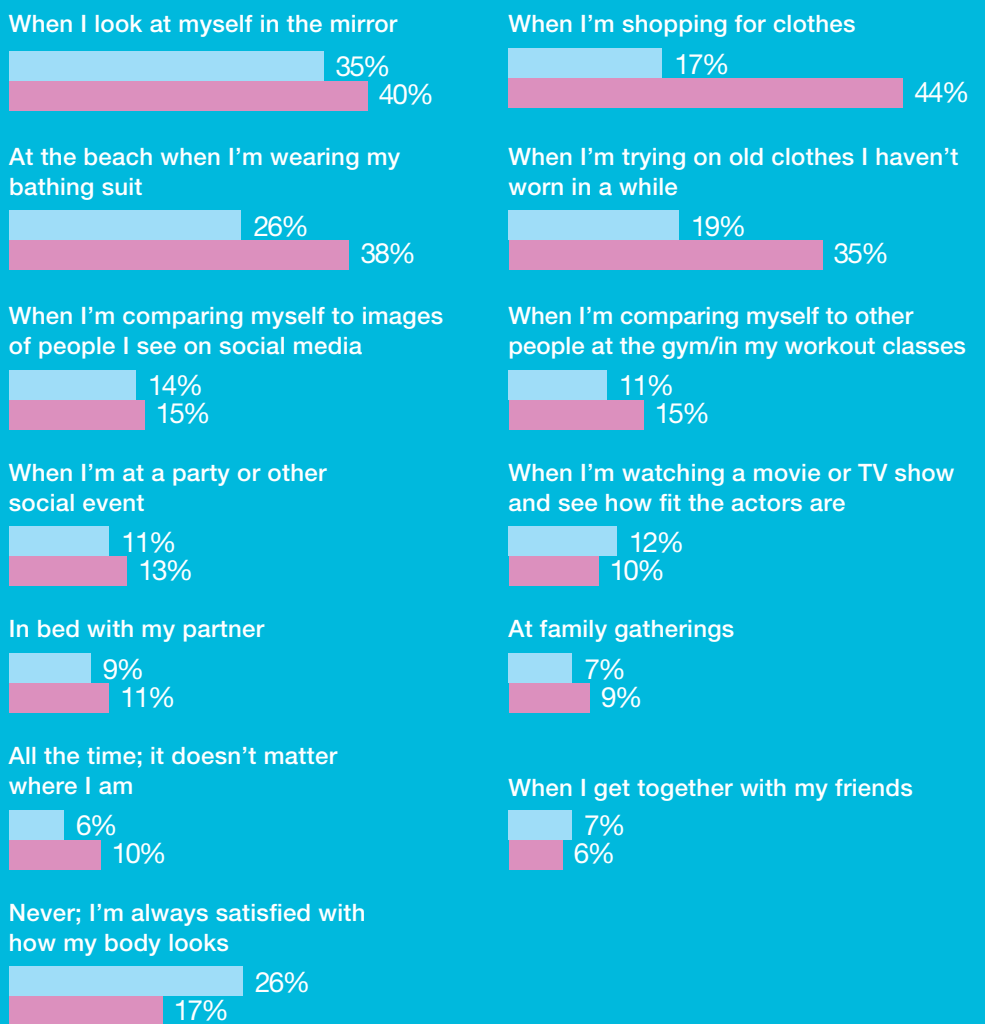
For brands broadly in the beauty space (fashion, fitness, healthcare and more), pushing that definition by including more different body shapes and sizes in media and marketing efforts could go a long way to helping people feel more comfortable in their own skin — whatever that may look like.

**Mallory Newall** is a Research Director within Ipsos’ public polling practice.

## When do we feel dissatisfied with our bodies?

Which of the following situations, if any, make you feel most dissatisfied with how your body looks?

■ Male ■ Female



(Source: Ipsos survey conducted between January 3 and 5, 2018 on behalf of RiverMend Health among 1,004 U.S. adults.)

# What does beauty look like in your country?

**Darwin wrote of mate selection as an aesthetic enterprise, outside his practical laws for natural selection. “On the whole, birds appear to be the most aesthetic of all animals, excepting of course man, and they have nearly the same taste for the beautiful as we have.”**

This distinction was mostly overlooked in his writing, but a recent New York Times Magazine feature reported that the definition of beauty itself is motivating scientists to re-examine how it does — and, importantly, does not — fit into natural selection theory.

So beauty for beauty’s sake is a thing in nature, yet science also tells us that there are certain biologically-driven standards. Facial symmetry, for example, is something humans are wired to find attractive. And so, in an Ipsos Global Advisor poll, we see remarkable consistency in physical definitions of beauty across nations and cultures. Interestingly, we see that for subjective and intrinsic characteristics as well. The chart at right is a re-up of a questionnaire from 2004, fielded by MORI before its acquisition by Ipsos, that helped inspire the Dove “Real Beauty” campaign. The relative importance of these characteristics remained mostly consistent, but the overall weight of each attribute dropped significantly across the board. For instance, on a 10-point scale, “happiness” was ranked an 8 or above by 90% of people surveyed in 2004 but just 71% in 2019 — while remaining the most important attribute. (See more at [future.ipsos.com](http://future.ipsos.com))

As you turn to the pages at the center of this issue, you’ll see the responses to another question. Ipsos asked about physical attributes of beauty as well. We then asked artists in 12 countries to illustrate a “beautiful” male and female based on their nations’ preferences for height, body type, eye color and hair color. Again, the results were consistent, but the interpretations demonstrate that the application of those standards can vary notably.

All of this stands in contrast to the aspirations discussed throughout this issue. The rise of globalization and the empowerment of people of color throughout the world suggest that we are at an inflection point where we are moving toward a broader standard of beauty for men and women. While there still is no shortage in advertising images of size 2 women and etched-ab men, the Dove campaign, and others that followed it, showed that broadening the definition of “beauty” doesn’t mean companies have to compromise sales.

As Anastasia Garcia said in her interview, “I really hope that diversity and representation become so normal that it’s something that we don’t even talk about anymore.”

Based on our data, industry players have some work to do. But given that the intrinsic beauty characteristics mentioned in our poll are generally valued more highly than the physical traits, perhaps companies’ definitions of beauty can evolve.

**Matt Carmichael** is the editor of *What the Future*.

## What makes someone beautiful?

Global average rating on a 10-point scale of importance where 10 is “extremely important.”

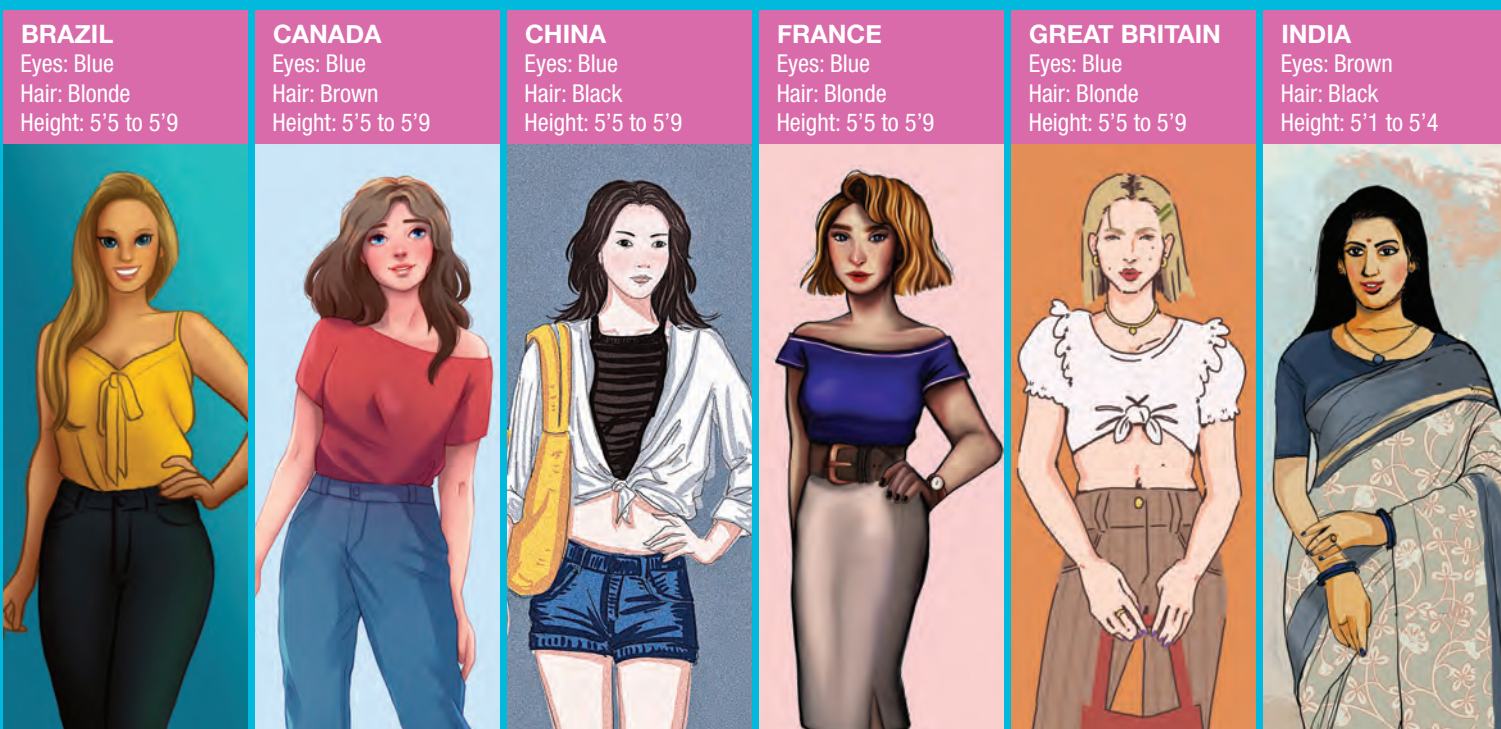
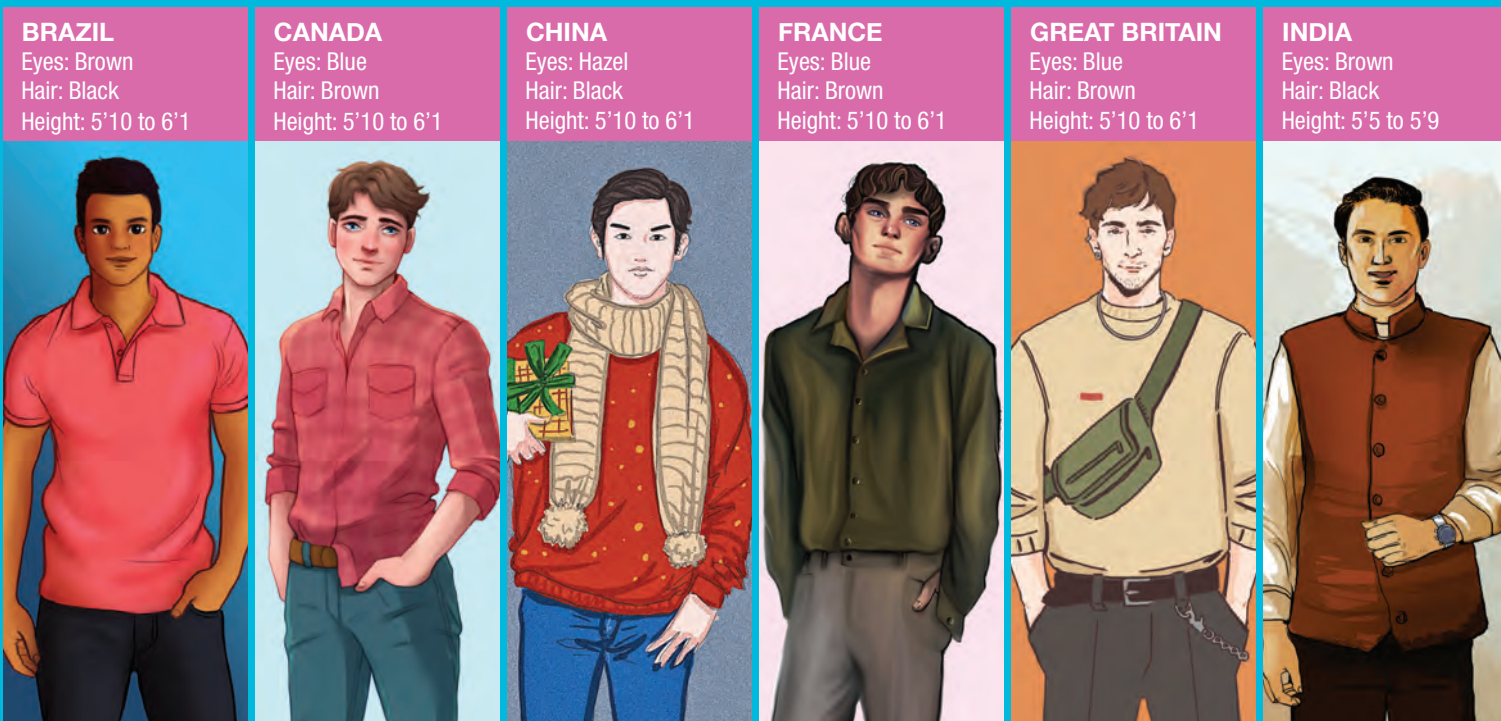
27-nation average of beauty attributes	Female attributes (mean)	Male attributes (mean)
Happiness	8.21	8.08
Kindness	8.15	8.2
Dignity	8.14	8.21
Confidence	8.1	8.3
Intelligence	8.0	8.13
Wisdom	7.93	8.02
Humor	7.72	7.98
Strength	7.44	7.87
Facial appearance	6.81	6.42
Appearance of skin	6.55	6.18
Sense of style	6.51	6.35
Sexiness	6.51	6.36
Body weight and shape	6.39	6.39
Hair styling	6.23	6.04
Professional success	6.21	6.86
Youthfulness	6.11	5.97
Financial success	5.95	6.71
Spirituality/religious faith	5.5	5.5
Makeup/cosmetics	5.36	4.09

(Source: Ipsos Global Advisor survey conducted between April 19 and May 3, 2019 among 19,029 adults in 27 countries. For full datasets, please visit [future.ipsos.com](http://future.ipsos.com))



Ipsos asked more than 19,000 people to help us define beauty standards in their country. **But what does that actually look like?**




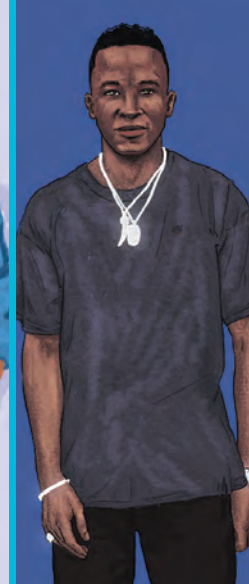

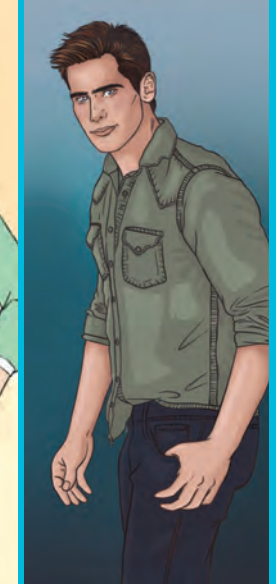
To find out, Ipsos commissioned artists in 12 countries to illustrate a male and female that fits the description. The artists were given the specs for height, body type, hair and eye color. The rest was up to them to interpret.



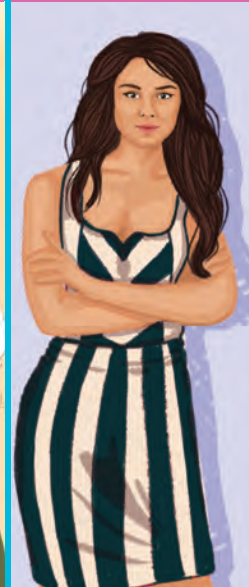

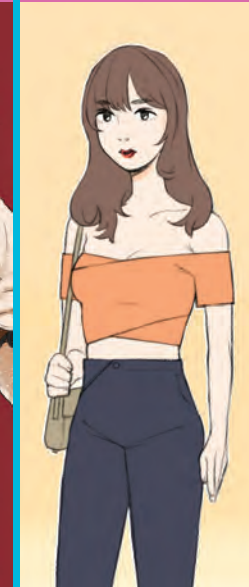



**Illustrators**

**Brazil:** Cristina Sena / **Canada:** Kae Richardson / **China:** Ernan / **France:** Nausinesaa  
**Great Britain:** Leah Marshallsay / **India:** Santanu Mitra

For full datasets, please visit [future.ipsos.com](http://future.ipsos.com)  
 One note: The illustrator in China did not think the top choice of blue eyes was culturally appropriate so he gave the woman brown eyes.  
 (Source: Ipsos Global Advisor survey conducted between April 19 and May 3, 2019 among 19,029 adults in 27 countries.)

<p><b>ITALY</b>                  Eyes: Blue                  Hair: Brown                  Height: 5'10 to 6'1</p>	<p><b>JAPAN</b>                  Eyes: Brown                  Hair: Black                  Height: 5'10 to 6'1</p>	<p><b>PERU</b>                  Eyes: Brown                  Hair: Black                  Height: 5'10 to 6'1</p>	<p><b>SOUTH AFRICA</b>                  Eyes: Brown                  Hair: Black                  Height: 5'10 to 6'1</p>	<p><b>SOUTH KOREA</b>                  Eyes: Brown                  Hair: Black                  Height: 5'10 to 6'1</p>	<p><b>U.S.</b>                  Eyes: Blue                  Hair: Brown                  Height: 5'10 to 6'1</p>
					

<p><b>ITALY</b>                  Eyes: Green                  Hair: Blonde                  Height: 5'5 to 5'9</p>	<p><b>JAPAN</b>                  Eyes: Brown                  Hair: Black                  Height: 5'1 to 5'4</p>	<p><b>PERU</b>                  Eyes: Brown                  Hair: Brown                  Height: 5'5 to 5'9</p>	<p><b>SOUTH AFRICA</b>                  Eyes: Blue                  Hair: Black                  Height: 5'5 to 5'9</p>	<p><b>SOUTH KOREA</b>                  Eyes: Brown                  Hair: Black                  Height: 5'5 to 5'9</p>	<p><b>U.S.</b>                  Eyes: Blue                  Hair: Blonde                  Height: 5'5 to 5'9</p>
					

**Illustrators**  
 Italy: Caterina Mazzei / Japan: yuko\_inx / Peru: Maria Jose Gomez / South Africa: Brandon Ryan  
 South Korea: Hoonyong Seo / U.S.: Chloe Condie Tate



# Who influences the influencers?

Beauty routines develop over time. Women experiment with new skin care and makeup products that meet their needs, but in order for a product to be used regularly, it must also fit with morning and evening beauty routines. Not everyone is satisfied with their routine, so they rely on a number of sources to provide them with recommendations and advice. What influences beauty consumers in North America, and how does this vary around the world?

Ipsos Global Advisor asked women about what influences their beauty routines, and the results underscore the range of sources. Globally, we stick close to people we know first, relying on our mothers, friends and sisters or other family members for their recommendations. The second tier of influencers are “experts” from online videos, magazines and other print media, as well as Instagram or other social media.

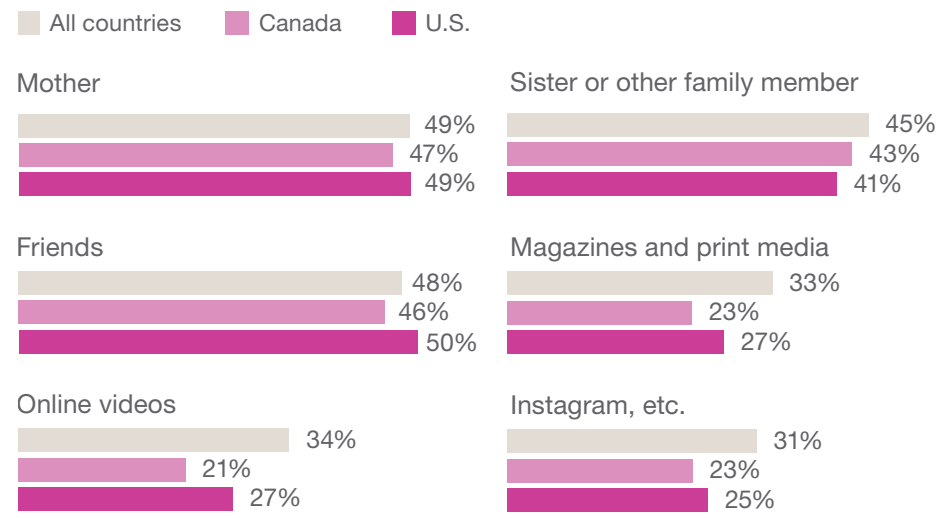
Digging a little deeper, in the U.S. and Canada similar trends emerge, but friends as influencers stand out in the U.K., China and Japan. In China, outside of people they know, consumers rate online videos as most influential (55%). In South Korea — a leader in starting new beauty routines — people rely on online videos more than print and just ahead of Instagram/other social.

Therefore, it is essential for brands to use multiple touchpoints to influence today’s beauty consumer. Manufacturers and retailers need to consider both the close-to-home beauty influencer as well as the “expert” who is online, in print and engaged in social media. For in-person recommendations, samples and trial sizes of products as well as in-store and on-package education play important roles. But personal influencers are themselves influenced by media influencers, and by in-store and online experts. Online influencers tend to focus on brands that have an interesting and relevant story or origin, and that lend themselves to videos/online education, results and fun. Brands need to cultivate online influencers while simultaneously cultivating the reviews and recommendations of everyday product users.

*Carla Flamer is President of Market Strategy & Understanding for Ipsos.*

## Friends and family help us shape our beauty routines.

Thinking now about your own personal beauty routine, how influential has each of the following been to you?



(Source: Ipsos Global Advisor survey conducted between April 19 and May 3, 2019 among 19,029 adults in 27 countries. For full datasets, please visit [future.ipsos.com](http://future.ipsos.com))



# Question: Is the future of beauty in serving unmet needs?



**Tristan Walker**

**Founder, CEO  
Walker & Co.**

Back in the day, Tristan Walker was a Silicon Valley wunderkind. He was still working on his Stanford MBA when he joined then-red-hot startup Foursquare as director of business development.

From there he went on to famed venture capital firm Andreessen Horowitz, where he prepared for his next move: launching his own beauty and grooming company with a flagship brand, Bevel. Walker & Co. has since been acquired by Procter & Gamble. When Walker asks **What the Future**, he's wondering how quickly he can scale solutions for the considerable unmet and overlooked needs of people of color.

# 62%

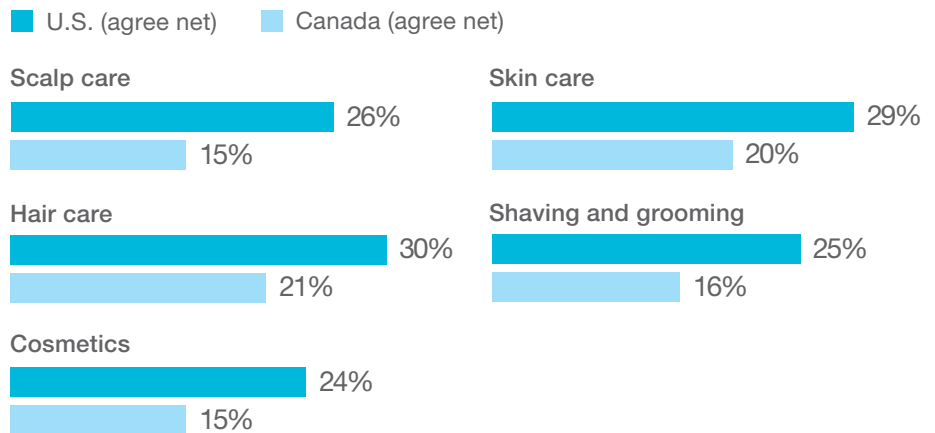
of black Americans say their beauty and grooming needs are unique to people of their cultural background, vs. 16% of white Americans.

(Source: Ipsos survey conducted July 2 to 4, 2019, among 1,208 U.S. adults.)



## Do your products need to be developed by people like you?

It is important that my ... products are developed and sold by people of my cultural background.



(Source: Ipsos survey conducted July 2 to 4, 2019, among 1,208 U.S. adults and July 5 to July 10 among 1,000 adults in Canada)

### WTF: Why do you think that, given their cultural influence, it's taken so long for some groups to have their needs met by beauty and grooming products?

Tristan Walker: The obvious reason is a lot of folks in positions to do this aren't reflective of the consumers they serve. One of the wonderful things about Walker & Co. is that we're minority-majority — folks of color, majority woman, majority woman of color in leadership.

### WTF: Do you feel that men in general are also an underserved market or maybe they're just starting to learn that there's more to grooming than, you know, splashing on some aftershave and combing their hair?

Walker: I don't think men are underserved. I think that there is, or has been, a lack of education about what could work. We're seeing a much faster-growing trend of men taking ownership of their own grooming

habits and routines. Folks want to take care of themselves in a way that they hadn't before.

### WTF: Research shows that men don't tend to talk about grooming with other men, but do research online. As there are more grooming blogs and style blogs and Instagram influencers and all those things, is that where that education is starting to happen?

Walker: One of the interesting nuances here is about cultural influence for our audience. Folks of color, particularly black consumers, have really been the arbiters of culture, because once you walk out of your house people see it: Beats by Dre headphones, Ciroc vodka and stuff like that. When you think about health and beauty, folks don't necessarily see the face wash that you're putting on your face. Folks don't necessarily see the trimmer you might be using at home. So, I think it's been a slower roll relative to some other

categories because you don't see it. But now folks are taking more ownership of their appearance and how they feel that visual comes [into play] in their own confidence and self-assurance. We get stories from folks who go out on job interviews, and they can do it more confidently because now they feel that they can shave with tools that work. This idea of "showing up" now provides an opportunity for people to be able to talk about it.

### WTF: In the survey data, we see that black and white Americans generally feel their beauty and grooming needs are being met by products on the market. How do you think that would have looked in the past and will look in five to 10 years?

Walker: I think 10 years ago it would have been even lower than what I think it really is today. Ten years from now, I'm assured that that number will be much higher because we exist.

**“I don’t think men are underserved. I think that there is, or has been, a lack of education about what could work.”**

**WTF: And P&G just launched the “My Black is Beautiful” line, too.**

Walker: They did a great job. I mean this is exactly what P&G does better than anybody, right? Understanding what the consumer needs and delivering on it and having the ability to do it at scale.

**WTF: In our survey, Asian and Latino consumers were less likely to say their needs were met by existing products. Does that point to additional markets with unmet needs?**

Walker: “Needs” is an interesting word. Do I have the products that I need that are articulated in a way that I need [them] articulated to me? Do you have Spanish-language text on your website? Are you engaging with us in your advertising, with folks who look like me? There is a whole world of needs within this very singular product. I can relate to Latino and Asian consumers. They’ve had needs since the start of the world. The world’s been around millennia and it’s 2019 and they’re still feeling that way. That’s a shame, but it’s also the opportunity.

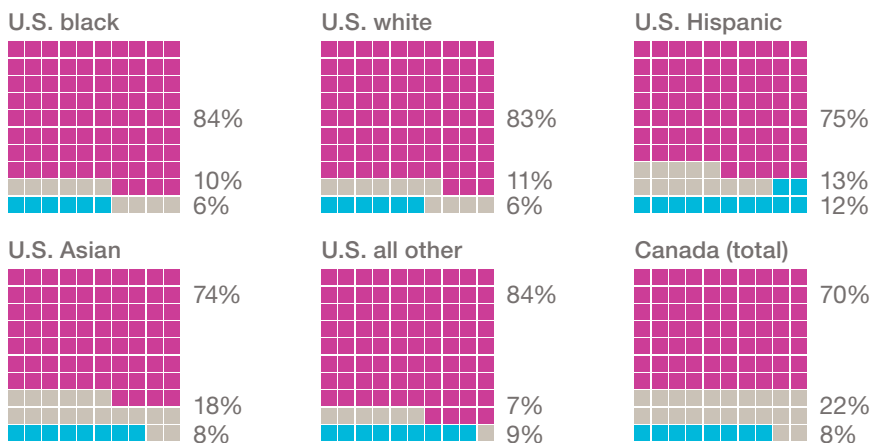
**WTF: You’re creating products to solve needs that have traditionally been solved in the salon and barbershop. How does that interact with barbershop culture?**

Walker: A lot of men rely on women in their lives to help with their kind of beauty habits. The barber also plays an important role. The first time I got a shave, it was at a barbershop, frankly because I was scared to do it myself. The barber teaches you with a straight razor, and specifically how it exfoliates the skin. We can leverage the barber as a conduit for the education that we need.

## Are Hispanic Americans the next underserved market?

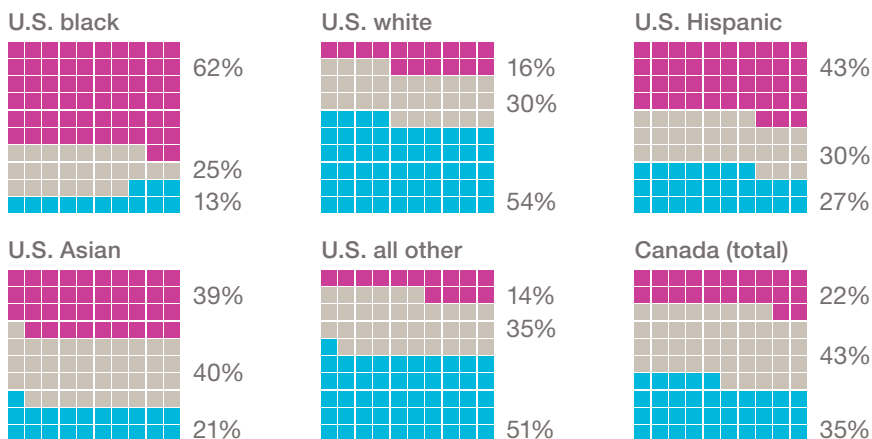
Agree Neither/Don’t know Disagree

My personal beauty and grooming needs are met by products I can buy today.



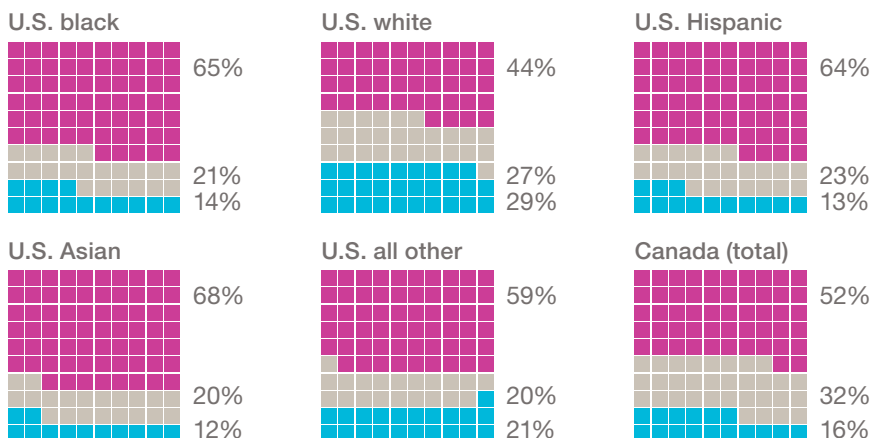
## Black Americans have unique beauty needs.

My personal beauty and grooming needs are unique to people of my cultural background.



## White Americans are less likely to see their individual beauty needs as unique.

My personal beauty and grooming needs are unique to myself.



(Source: Ipsos survey conducted July 2 to 4, 2019, among 1,208 U.S. adults and July 5 to July 10 among 1,000 adults in Canada)

# Affluent Millennial men and the grooming paradox



**Grooming has long been the domain of women. But as social mores evolve, affluent (household income \$125,000+) Millennial men are making inroads into this formerly forbidden territory in ways their fathers couldn't have imagined.**

Yet, while these men care as much about their appearance as women their age, old-fashioned attitudes about masculinity are creating tensions that brands and retailers should recognize — and resolve.

Older affluent males report having speedy morning rituals, while a majority of Millennial men say they spend a “great deal” or “fair amount” of time on theirs. At the same time, they're also less likely than other men to say the time is well-spent.

In other words, affluent Millennial men want to look their best but don't feel great about the effort expended or the results. Their inexperience with new products and routines contributes to their dissatisfaction with their results.

How they access grooming information is one source of tension. While they turn to more sources than older men do, they lag behind affluent Millennial women, especially from insight from friends, family and all forms of media. Affluent Millennial men say that they do not discuss this topic with friends.

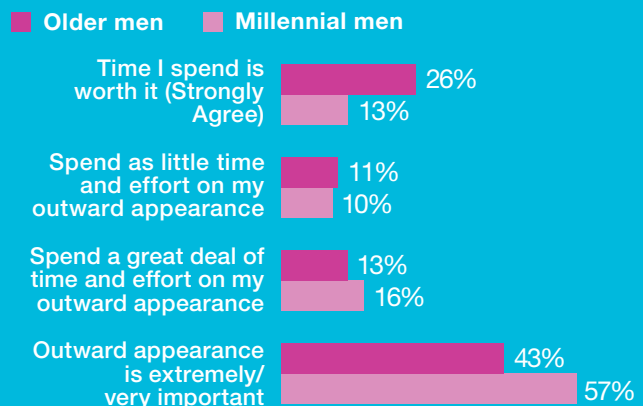
Thus, more dissonance: young men are actively seeking grooming inspiration. But traditionally, men don't discuss grooming habits with those closest to them and the data confirms that.

Finally, affluent Millennial men report spending less money per month on products than any other demographic aside from 50+ men — less than \$50 a month. This group cares deeply about grooming and spends time in grooming activities, yet even affluent Millennial men don't spend much money on the category. There is an opportunity for marketers to ignite this group's interest, education and spending.

Affluent Millennial men represent a rich opportunity — and a fascinating challenge — for grooming brands and retailers. This powerful group would likely welcome education and inspiration, especially if messaging is presented in a way that affirms their identity.

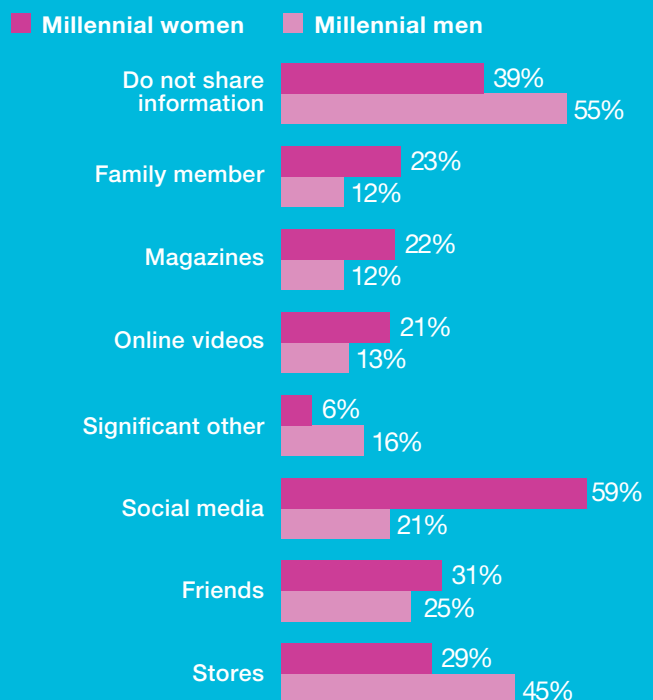
*Michael Baer is a senior vice president and head of audience measurement at Ipsos.*

Millennial men believe grooming is important, but aren't sure they're getting it right.



The first rule of Millennial men's grooming: We don't talk about grooming.

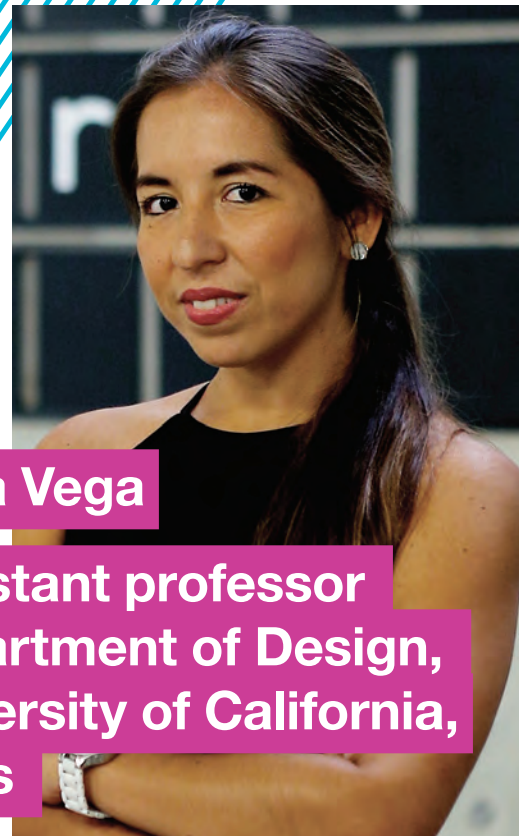
Percent who seek information from the following sources.



(Source: Ipsos Affluent Survey, Spring 2019 and Barometer 2018)

## Question:

Are we ready for more functional beauty?



**Katia Vega**

**Assistant professor  
Department of Design,  
University of California,  
Davis**

**Katia Vega has an unusual specialty in her research. She adds technology to everyday beauty products to give people “superpowers.”**

When she thinks **What the Future**, she’s wondering if we’re ready for all the cool stuff she’s working on.

The Blinklifier, a collaboration between Vega and artist Tricia Flanagan, uses metalized fake eyelashes to control devices, in this case LEDs in the headpiece, based on the blinking of the subject.

(Photo: Dicky Ma)



# The more functional, the better for beauty tech

In recent years there have been significant advancements in the world of beauty and technology, such as bracelets that also track your heart rate, or lipsticks that change color based on your body's temperature or pH. How interested are you in the following products that also mix beauty and technology?

■ U.S. ■ Canada

**Tattoos with biosensors that change color depending on aspects of your real-time health such as blood sugar levels or pH levels**



**Nail polish with sensors that could be used to unlock a car or pay for items, similar to tapping your phone or credit card**



**Hair extensions that, when touched, trigger an action on your phone such as taking a picture or starting a recording.**



(Source: Ipsos survey conducted between May 30 and 31, 2019 among 1,004 adults in the U.S. and between June 19 and 21, 2019 among 1,003 adults in Canada.)

## WTF: How would you describe what you do?

Katia Vega: I call it beauty technology. In my research I try to imagine different ways to use these techniques to modify your body, but instead of using traditional makeup or tattoos, I use technology to expand its functionality, so your body itself becomes a kind of interface.

## WTF: You recently got a grant from Johnson & Johnson to continue work on one of your projects involving tattoos. How do you envision melding technology into body art like that?

Vega: That project is a collaboration between MIT Media Lab and Harvard Medical School. We replace traditional inks for tattooing with biosensors. These sensors work in a similar way to [test] strips for knowing different levels of glucose, cholesterol or if you're pregnant. It's an indicator, and [the sensors] change color depending on different levels in your body. We are exploring pH, sodium and glucose biosensors. Imagine, for example, that someone with a tattoo with these kinds of interactive tools [can see] that the color of glucose is changing and will know when it's more useful for insulin.

## WTF: Your other projects involve cosmetics or fingernail polish or hair extensions. What other beauty applications are you exploring adding technology to?

Vega: My mom had her lipstick, my grandmother had lipstick. It didn't change very much over time. So I was

thinking about how we embed technology in these products that we wear every day. They're very close to your body because they're on your skin. And then we will have an extra superpower from the technology. For example, with conductive makeup I created a chemical process for metalizing [false] eyelashes so they create a circuit in between your upper eyelids and lower eyelids. When you close your eyes or blink, we can sense that you're blinking, and [the eyelashes can be programmed so that] a drone will fly or lights will turn on or music will turn on.

## WTF: I can imagine a lot of different applications for that...

Vega: We are working with someone who has disabilities. For him we're using a kind of "second skin" material traditionally used in Hollywood for making a big nose or a scar or something like that, but we add sensors so he can turn on the TV or change the channels just by blinking because he cannot move his body.

## WTF: You've worked with nail polish, too.

Vega: I developed nail polish with chips similar to the ones for paying the Metro [subway]. Imagine that you could have one nail for paying the Metro, another for opening the door of your office. We have all of these cards in our wallet. We could instead use chips built in the tips of your fingers to interact with different devices.

## WTF: How far away are we from seeing things like this on the market?

Vega: In Japan they are selling already some fingernails with chips and also some eyelashes with LEDs that are more for festivals or performances. In general, research of this kind will take time to develop and to go to market and capture [and develop] a different kind of audience. I started with these ideas in 2012. We're now seeing some of these ideas are already in the markets. Most of the projects I don't patent. I like the idea of making them available.

## WTF: I assume there are implications for the user, too.

Vega: It's a new learning experience for the user as it becomes closer to your body. There are ethical and technical considerations.

## WTF: Fingernail polish chips can be removed on a whim. But with tattoos or embedded technologies, what happens when the device stops working?

Vega: Exactly. For example, if you have a tool that is telling you what your glucose level is, it kind of becomes public information. How do you hide that information and how do you reveal that information just when you want it? For me, these projects are about making people think about their body and its possibilities. I like the idea of enabling the possibilities for interacting with the skin and the body.



## Question:

Will technology enable a broader range of “looks” for beauty shoppers?



**Xavier Vey**

**General manager,  
Western European Zone,  
L'Oréal Luxe**

**Xavier Vey has led beauty giant L'Oréal's Luxe division for the U.S. as president and chief operating officer since 2016. He oversees a brand portfolio that includes Lancôme, Kiehl's, Urban Decay, IT Cosmetics, YSL, Giorgio Armani, Ralph Lauren and Viktor & Rolf.**

As part of the company's digital transformation, L'Oréal has invested heavily in technology. In 2018, it acquired the ModiFace augmented reality application for virtual trial of cosmetics and hair and nail colors. When Vey asks **What the Future**, he wants to know if people will embrace virtual and digital interfaces as part of their beauty-buying routine. He spoke with WTF before he moved back to France to run L'Oréal's Luxe division in Western Europe.

# 7%

of men report using lip color, mascara and eyeliner in the past 12 months.

(Source: Ipsos survey conducted between June 12 and 13, 2019 among 1,005 adults in the U.S. who indicated they had purchased/used each product within the past 12 months.)

**WTF: What did you learn from the consumer survey?**

Xavier Vey: Two things. It confirms that we're on the right strategy with the ModiFace acquisition because it shows that on products like lip color and nail polish there's definitely interest. There's something powerful in being able to try it online. What's also interesting is we see this increased connection and engagement of the consumer offline. The second thing that we learn is what holds people back.

**WTF: Yes, you see in the data that most people are still skeptical, especially with foundation.**

Vey: When you're talking about trying a foundation, and you know foundation is a very important part of the makeup business because it's less linked to the precise effect that it gives to your look and rather to the actual, exact color match with your skin. My hypothesis is that the technology is not yet at that level of preciseness on foundation.

**WTF: How are you improving it?**

Vey: Smartphones are getting better in photography. What is holding us back is the capacity to record the right color at a distance. What we have that is super-precise today is in the source, a color matcher you apply directly on the skin. It's a measure from three or four points on the skin. What is difficult is to go from directly touching the skin with a tool that measures the color to doing it on an iPhone through a camera lens. The big next step is the capacity to do that. The future is the capacity to go further in customized, personalized service for the consumer.

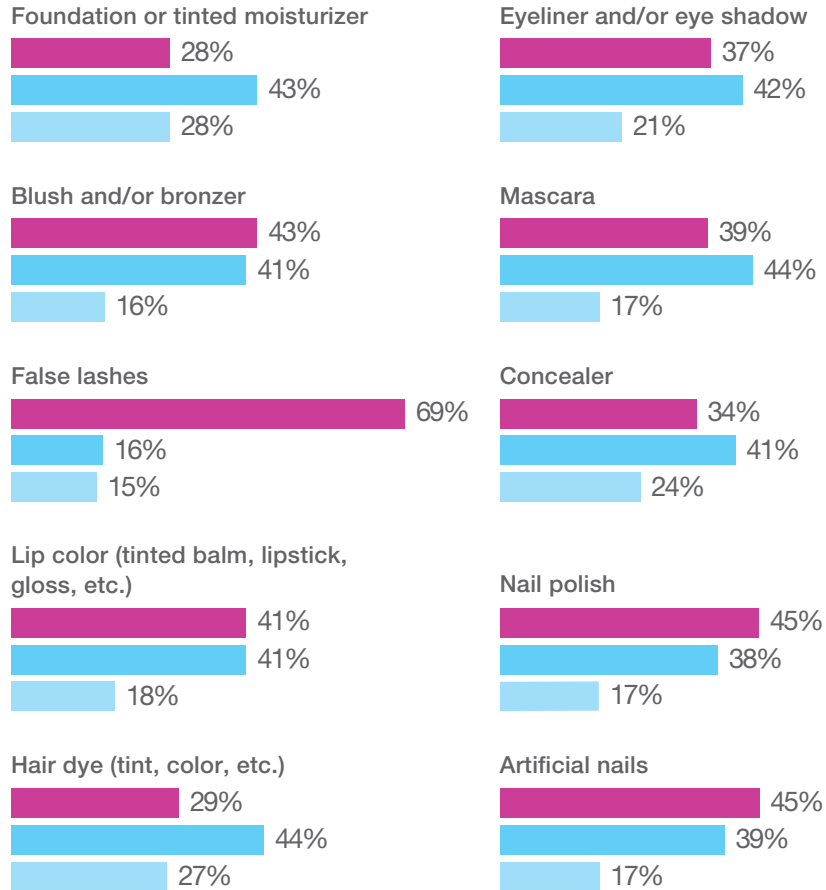
**WTF: What does that mean for the future?**

Vey: We have two projects that we are finalizing. One is called the Shade Finder. We've got in the point of sale a machine that measures your shade and tells you the shade that you need because women are very afraid of not choosing the right shade. The second is called Le Teint Particulier, which is about how we want to be totally inclusive and diverse. We started it a few years ago. It's a custom-made foundation we produce in the store to the exact shade

Will people buy a product they've only tested virtually? It depends...

Assuming you liked it and it was an acceptable price, do you think you would purchase a new grooming/makeup product that you had ONLY tried virtually? By "virtually" we mean by using a computer or phone app either at home or in-store, with software that shows you how the product looks on your face.

- Yes, I would definitely buy it
- No, I would definitely not buy it
- Unsure, I might buy it



(Source: Ipsos survey conducted between June 12 and 13, 2019 among 1,005 adults in the U.S. who indicated they had purchased/used each product within the past 12 months.)

corresponding to your skin, up to 20,000 shades. It's a very good insight for marketing in the future that after years of work on foundation we are still at the beginning of what technology is going to allow us to do for women in color matching.

**WTF: How does having AR like ModiFace give people more confidence to try bolder options or a much broader spectrum of colors and looks?**

Vey: In lipstick, we offer a range of 100 lipsticks, but in a given brand there

are always 10 shades that are the best sellers. It's not even the 20/80 rule. It goes even smaller in lipstick and one of the reasons is that women are worried about making a mistake in buying it. When women try lipstick when they are in the point of sale, most of the time they don't try them on their lips. They try them on their hand or their arm. With this AR you really can experience it on your lips without having to take it off and on. You can really experience 100 shades. So, yeah, it's increasing the willingness to try different things and not buy the same look.

## Question:

If beauty is art, how do we fund more of it?



**Amanda Palmer**

**Musician, author**

The text message came in before the interview: “It’s Amanda effing Palmer. Running a tad late.” This is 100% on-brand for the singer/performer. From her early days as a street performer, to her time with the Dresden Dolls, to her TED talk and subsequent best-selling book “The Art of Asking,” to her current album (which NPR called “a grand statement of empathy”), Palmer commands attention.

Her rapt community of followers on the Patreon crowd-funding platform (15,000 strong, each pledging about \$3 per month, she says) support her financially and emotionally. The emotional part isn’t a one-way street. When she asks **What the Future**, she is thinking about the role of art in beauty and the rapidly changing relationship between the artist and arts funding.

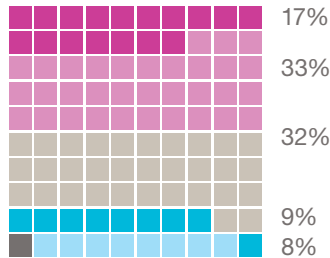


## We feel more beautiful when surrounded by beautiful things, not beautiful people.

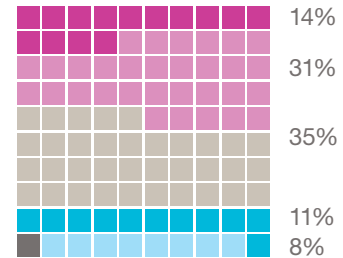
To what extent do you agree/disagree with the following statements?

■ Strongly agree     ■ Somewhat agree     ■ Neither agree nor disagree  
■ Somewhat disagree     ■ Strongly disagree     ■ Don't know

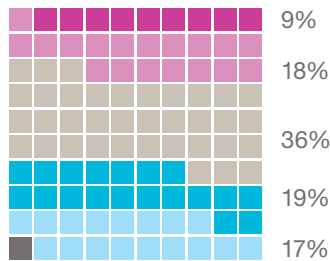
I feel more beautiful when I am around beautiful things like nature or art or architecture.



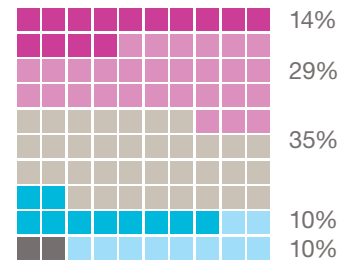
I feel more beautiful when I am reading, watching or listening to something beautiful.



I feel more beautiful when I am around beautiful people.



I feel more beautiful when I see people who look like me portrayed as beautiful in ads and the media.



(Source: Ipsos survey conducted between May 16 and 20, 2019 among 1,201 adults in the U.S.)

**WTF: You asked if people feel more beautiful when surrounded by beautiful things and beautiful people. The answers, generally speaking were “yes” and “no” respectively. What did you think of those results?**

Amanda effing Palmer: The more I've moved through the world, the more I have proof positive that what I see with my eyes really does affect my state of mind. I don't just mean the other emotional human beings pottering around. I mean whether I can see the sky, whether there are large, clean uncluttered spaces, whether they be nature or a table surface. What's so interesting about all of this is that beauty is completely subjective.

**WTF: Yet people don't feel more beautiful when surrounded by beautiful people.**

Palmer: I would say that there are two definitions of beautiful people. They're superficially beautiful people who get paid

money to model sports clothes, and then there are internally beautiful people. When I'm around internally beautiful people, I feel infinitely more internally and externally beautiful myself.

**WTF: In our global study (page 16) people tended to prioritize “internal” beauty, but also had a very consistent definition of external beauty.**

Palmer: Well, we are mammals and we are definitely set with internal systems for procreation and what looks tasty. It's just a thing.

**WTF: Eighty percent of people find nature beautiful, and two-thirds say they always or often find music beautiful. Others find art in architecture or literature. This would seem to make a case for making more beautiful art.**

Palmer: It doesn't mean anything unless we agree on a definition of beautiful, right? But there's a lot of argument that I could

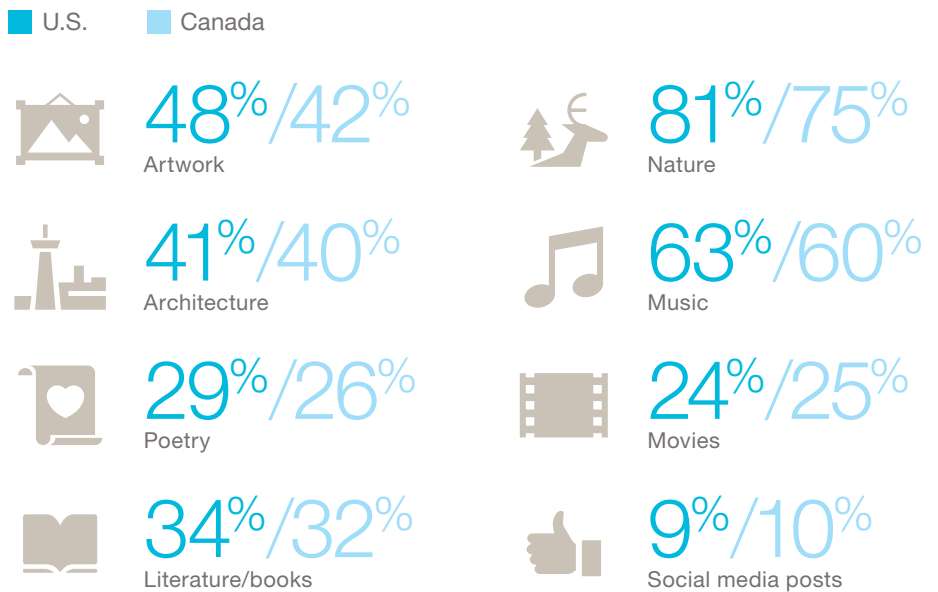
make where all art is just beautiful by virtue of being fucking art. The more I work in the arts I'm reminded how far we have gotten from the source of why human beings started creating art for one another to begin with: It helps us. It connects us. It fortifies us. It feeds us.

**WTF: Can you talk a little about your Patreon community and how that relationship is changing between you as an artist and your fans as a funding source?**

Palmer: I've been making art and trying to pay rent for 20 years. As someone who came out of the punk culture and the folk culture that really abhorred the commercialization of art, the more I move through the world nowadays the weirder I feel, because the younger generation coming up does not have the same relationship to “selling out” that my whole generation did. It's super-disorienting because we don't share a common language anymore.

“I don’t know, what would Patti Smith advertise? Space X? Tampons? Moleskine journals? Who knows? I respect the decision of any artist to figure out how to play the game any way they want.”

How often do you find the following beautiful?



(Source: Ipsos survey conducted between May 16 and 20, 2019 among 1,201 adults in the U.S. and between June 19 and 21, 2019 among 1,003 adults in Canada. Responses of “always” or “often” shown.)

**WTF: How do you balance the commercial aspects of making a living and the art itself?**

Palmer: I feel about commercial work the same way I feel about feminism: I am completely 1,000% pro-choice. I cannot and would not judge Lou Reed for doing a Honda ad or Bob Dylan for doing a Victoria’s Secret ad or for Patti Smith if she decides to do a complete about-face and — I don’t know, what would Patti Smith advertise? Space X? Tampons? Moleskine journals? Who knows? I respect the decision of any artist to figure out how to play the game any way they want.

**WTF: If “selling out” is less of a problem, that could open the door for brands to be a larger part of funding the arts, by aligning with artists and musicians who fit their aesthetic or message, or appeal to their audiences.**

Palmer: I think some of them do. I mean, look at how [rock band] OK Go paid for their last few videos [through brand partnerships]. Or the fact that Red Bull has a music festival that gives experimental musicians work. Every single artist is going to have to make a choice to whom they want to be beholden. That’s the critical issue.

**WTF: And now you’re funded directly from your fans.**

Palmer: My relationship with these people is real. Their relationship with me is real. I just spent my morning writing a thank you letter to all 20,000 people who came to my spring tour to remind them that I know that I’m doing it for them, and they are showing up for me, and that this isn’t random.

**WTF: Much of your current art is finding beauty in pain. I’m paraphrasing a bit, but you’ve said that the audience isn’t there to validate your pain, they’re there because they have their own issues in their lives that they’re dealing with, and somehow your show helps. Have you figured out how that exchange works?**

Palmer: I think human being mammals desperately need to feel un-alone and need to feel our experiences and losses, and our difficulty is reflected in one another. We forget how practically applicable art can be in our lives. We forget that the reason our ancestors came up with this bizarre idea in the first place was to help each other to make sense of the world, to make sense of pain, to make sense of the dark. Art is a fantastic vessel to carry that message of un-aloneness from one to the other.

# Are we getting enough Vitamin-Art in our diets?

In our Q&A with Amanda Palmer we discussed how people feel more beautiful when surrounded by beautiful things. And that in itself is a beautiful thing, right?

So, the question then follows: “Do we actually take in beauty and support the creation of new and more beautiful things?” Ipsos, working with the non-profit Americans for the Arts, has fielded two large, national surveys on the topic. The answers turn out to be “somewhat” and “yes.”

About half of Americans actively take part in some form of artistic creation themselves, be that painting, photography, dancing, writing or even quilting and sewing. Far fewer have sought out art or cultural experiences like museums, concerts and zoos. Yet large majorities feel that the arts help them understand cultures better and unify people and have a positive effect on health and well-being. Three in four say that arts give them “pure pleasure.”

Not surprisingly, people also approve overwhelmingly of government funding for the arts.

Given this research, there seems to be a self-care angle to the arts that perhaps we’re not accounting for in our daily lives. We appreciate the arts, and they make us feel a variety of positive things, but we don’t take part in them often enough.

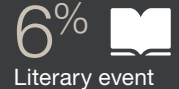
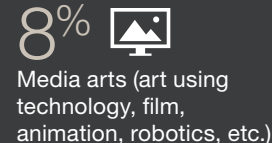
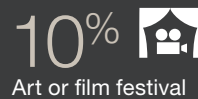
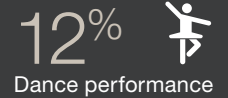
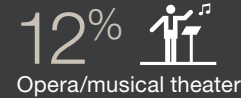
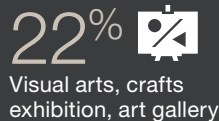
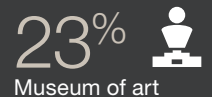
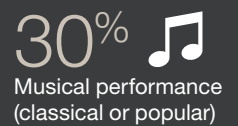
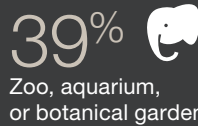
All of this seems to tee up an opportunity for brands, marketers, retailers and e-tailers. If you’re selling products to enhance beauty, incorporating art or music or even plants — objects of beauty — could help customers feel more beautiful (or even simply happier!) as they’re testing your products. Perhaps surrounding customers with photos of beautiful models has the opposite impact. The trick, of course, will come in understanding what “beauty” might look like for your particular clientele or segment.

As they say, it’s in the eye of the beholder.

**Julia Clark** leads Ipsos’ Marketing and Communications team.

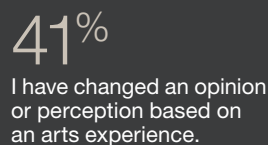
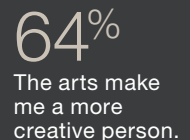
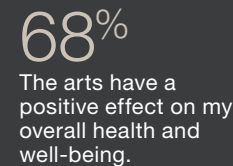
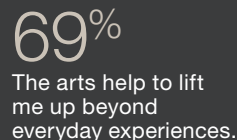
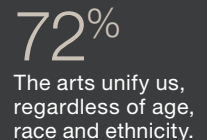
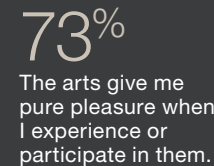
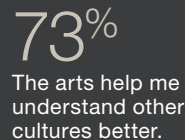
## Arts are important, but do we engage enough?

Thinking about “the arts,” have you visited or attended any of the following in the past year?



## Arts play a role in shaping our perceptions.

Thinking about your experiences with the arts (e.g., when you attend an arts event or make art personally), to what extent do you agree or disagree with the following statements? (agree net)



(Source: Ipsos survey conducted for Americans for the Arts among 3,023 adults between May 9 and May 16, 2018)

# On the Fringe With Amy Webb



**Beauty, science and technology have always been intertwined. Hundreds of years ago in Japan, geisha formulated a makeup base using wax from local trees. Chalk-white faces, necks and forearms were in vogue. In the 1920s, makeup artist Helena Rubinstein experimented with kohl to invent mascara for the silver screen, which set off a new trend in long, jet-black eyelashes.**

Artificial intelligence, augmented reality and smart cameras are evolving at an interesting moment in time: We are under continuous surveillance, our gender identification has become more fluidly expressed, and all of us want to look our best. Quantitative futurist Amy Webb gives us some ideas of the trends to watch as tech and beauty move into the next chapter of their convergence.

**1. AI influencers and synthetic content** — Miquela Sousa is a 19-year-old singer-songwriter, a model for Prada and Calvin Klein, and a social media influencer with 1.6 million Instagram followers. And she — like many of her “friends” — isn’t a real human. While Miquela herself isn’t AI, you can think of her as Version One of a new era of beauty, built by algorithms and generative adversarial networks that can stitch together photos, videos, objects, motions and other types of content to create realistic-looking people. She’s not fake, but rather synthetic. The company behind Miquela, L.A.-based Brud, is one of several venture-backed companies like Superplastic and Shadow that act as agent creators. As synthetic content evolves, so will younger consumers’ attitudes on beauty and style.

**2. Beauty demands in China** — Many people in China now use facial recognition to pay for everything from groceries to taxicabs. It isn’t privacy that has many Chinese people concerned, but rather how they look in all of the next-gen, pay-by-face apps. A poll by Chinese news organization Sina Technology revealed that 60% of those who use facial recognition for payments feel self-conscious about how they look and would prefer a system of payment that isn’t as unflattering. In response, payment giants like Alipay — Alibaba’s e-wallet subsidiary, which counts more than a billion monthly active users — are building in beauty filters to their systems. This could have a reverberating

effect as more digital payment companies enter the marketplace, and as competition for market share heats up. Consumers might be willing to pay higher transaction fees in exchange for looking great — or at least avoiding looking bad — while they make purchases.

**3. Interactive mirrors** — New mirrors capable of recognizing you and suggesting helpful information will start to change how you exercise and apply makeup. While connected mirrors have been available for the past few years, the latest mirrors are aided by machine learning and are designed to interact with consumers seamlessly, like a visual conversation. The Artemis smart mirror from CareOS is intended to help users try out new hairstyles and colors; however, it will also collect and analyze data to determine whether that mole on your neck is something a doctor should check out. Capstone’s Connected Home and Kohler’s Verdera Voice smart mirrors are powered by either or both Google Assistant and Amazon’s Alexa. Mirrors aren’t just about reflecting aspirations, they’re also helping consumers achieve them.

*Amy Webb is the founder of the Future Today Institute, a professor at New York University Stern School of Business, and author of “The Big Nine,” about the future of artificial intelligence.*



# Connections

The future of beauty, as we've examined in this issue, hinges on changes to technology, ingredients and definitions as the concept of beauty becomes broader and more inclusive. The industry itself is shifting, as more boutique and demographically focused startups challenge – and are sometimes acquired by – larger and traditional players. But how will these developments impact other industries besides beauty?



## Media/marketing

As diverse and marginalized populations are more represented in products, media and marketing, progress is being made. The Dove “Real Beauty” campaign is an early and oft-told tale. But thankfully there are more and more examples – from female super-heroes in major movies to brands like Fenty Beauty empowering diversity and CVS going “Photoshop-free” in its advertising. Expect these trends to continue and accelerate.



## Mobility

As we head toward autonomous cars, a new frontier is opening for beauty brands: the vehicle as dressing table. The beauty routine can shift into commuting time, moving from the bathroom into the passenger compartment. Brands can take proactive steps to create more mobile and tech-integrated products, and even work with auto manufacturers to develop smart mirrors and other means to transform the morning commute.



## Healthcare

As Katia Vega (page 24) demonstrates, the merger of beauty, technology and health isn't far off. Skin sensors, wearable sensors and technologies that allow us to use our body as an interface will transform some aspects of how we measure and treat our vital signs. All of this will integrate into our personalized “look” and allow our healthcare professionals to react and be proactive about our care in new ways.



## Fashion

Fashion and beauty are inexorably tied to one another. Many of the beauty trends covered here will apply to fashion as well. Cosmetics will interact and interface with “smart clothing” that may also interface with our devices – tablets, phones, glasses and implants. Meanwhile, the same desires that drive consumers to “natural” cosmetics will have them seeking greater understanding of what, how and where materials are sourced for their clothing.

# WTF

WHAT THE **FUTURE**

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