



T11	Table 1	Q1 - In your opinion, what qualities, emotions, or attributes make someone 'beautiful'?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T12	Table 2	Q2 - On balance, how confident or not are you as a person?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T13	Table 3	Q3 - Which, if any, of the following make you feel confident about yourself?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T14	Table 4	Q4 - Which, if any, of the following make you feel not confident about yourself?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T15	Table 5	Q6 - Thinking about trying new beauty products and treatments, which if any of the following motivate you to try something new?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T16	Table 6	Q7 - Summary - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. Q7 1 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Skincare creams, including moisturisers, repairing, and antiaging creams or serums	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T17	Table 7	Q7 2 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Injectable dermal fillers containing Hyaluronic acid (HA)	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T18	Table 8	Q7 3 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Injectable biostimulators - products that trigger the production of collagen	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T19	Table 9	Q7 4 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Injectable Botox (or another Botulinum Toxin)	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T110	Table 10	Q7 5 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Chemical peel	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T111	Table 11	Q7 6 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Laser therapy	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T112	Table 12	Q7 7 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Microneedling	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T113	Table 13	Q8 - Summary - To what extent do you agree or disagree with the following statements?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T114	Table 14	Q8 1 - To what extent do you agree or disagree with the following statements? - Real beauty for me is a healthy body and mind	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T115	Table 15	Q8 2 - To what extent do you agree or disagree with the following statements? - The appearance of my skin affects how I feel about myself	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T116	Table 16	Q8 3 - To what extent do you agree or disagree with the following statements? - I would use skin treatments to reduce the first signs of ageing	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T117	Table 17	Q8 4 - To what extent do you agree or disagree with the following statements? - If you don't treat signs of ageing, you look like you have neglected yourself	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T118	Table 18	Q8 5 - To what extent do you agree or disagree with the following statements? - I edit photos of myself or apply filters before uploading them on social media	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T119	Table 19	Q8 6 - To what extent do you agree or disagree with the following statements? - I love to share selfies of myself on social media	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T120	Table 20	Q8 7 - To what extent do you agree or disagree with the following statements? - It is important for me that my appearance reflects my true self	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T121	Table 21	Q8 8 - To what extent do you agree or disagree with the following statements? - I am comfortable with who I am, regardless of societal expectations of appearance	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T122	Table 22	Q9 - Thinking specifically about injectable skincare treatments for your face or neck, when, if at all, are you likely to have this treatment...? By injectable skincare treatments we are referring to: Hyaluronic Acid (HA) dermal fillers, Biostimulators, Botox (or another Botulinum Toxin)	Base: All adults 18-25 who would consider or are past/current users of injectables
T23	Table 23	Q10 - For which, if any, of the following reasons do you or would you have injectable skincare treatments for your face or neck? By injectable skincare treatments we are referring to: Hyaluronic Acid (HA) dermal fillers, Biostimulators, Botox (or another Botulinum Toxin)	Base: All adults aged 18-25 who are likely to have injectables treatment in future
T24	Table 24	Q11 - Which, if any, of the following reasons describe why you have not used injectable skincare treatments for your face? By injectable skincare treatments we are referring to: Hyaluronic acid dermal fillers, Biostimulators, Skin Boosters, Botox (or another Botulinum Toxin)?	Base: All adults aged 18-25 who have not used injectables but are aware of them
T25	Table 25	Q12 - Summary - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T26	Table 26	Q12 1 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - It's okay if aesthetic treatments are noticeable as long as I like the result	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T27	Table 27	Q12 2 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I prefer results that are subtle and not obvious to others	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T28	Table 28	Q12 3 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I think any aesthetic treatment is noticeable on the person who had it	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T29	Table 29	Q12 4 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I prefer aesthetic treatments that maintain a natural look over those that look artificial	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T30	Table 30	Q12 5 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I enjoy experimenting with different styles and looks but keep changes subtle	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T31	Table 31	Q12 6 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I view aesthetic treatments as part of my self-care routine	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T32	Table 32	Q12 7 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - Enhancing my appearance through aesthetic treatment is a form of self-expression for me	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T33	Table 33	Q13A - Summary - To what extent do you agree or disagree with the following statements about your facial appearance?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T34	Table 34	Q13A 1 - To what extent do you agree or disagree with the following statements about your facial appearance? - I like to try new ways to enhance my facial features	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T35	Table 35	Q13A 2 - To what extent do you agree or disagree with the following statements about your facial appearance? - I am always trying out new looks on me	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T36	Table 36	Q13A 3 - To what extent do you agree or disagree with the following statements about your facial appearance? - I like to use technology (e.g., virtual try-on services, photo editing apps, etc.) to see different looks on me	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T37	Table 37	Q13A 4 - To what extent do you agree or disagree with the following statements about your facial appearance? - I don't like to try new beauty products or treatments	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T38	Table 38	Q13A 5 - To what extent do you agree or disagree with the following statements about your facial appearance? - I rarely step out of my comfort zone when it comes to my facial appearance	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T39	Table 39	Q13B - Still thinking about your facial appearance, which, if any, of the following do you ever use nowadays?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T40	Table 40	Q15 - Thinking about yourself 10-20 years from now, which, if any, of the following describe how you would like to feel about your appearance?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T41	Table 41	Q16 - Summary - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T42	Table 42	Q16 1 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Clear and honest information at each step of the treatment journey (e.g. product or treatment ingredients, potential risks, expected outcome, after-care advice etc.)	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T43	Table 43	Q16 2 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Clear standards to identify qualified practitioners	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T44	Table 44	Q16 3 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Access to evidence-based information from healthcare professionals	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T45	Table 45	Q16 4 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Enough time dedicated to consultation	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T46	Table 46	Q16 5 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Follow-up care after treatment	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T47	Table 47	Q16 6 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Optional virtual consultations before in-person visits	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T48	Table 48	Q16 7 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Optional virtual consultations after in-person visits	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T49	Table 49	Q16 8 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Clinics that are conveniently located	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T50	Table 50		

T51	Table 51	Q16_9 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Seeing real pictures of past patients before-and-after treatment	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T52	Table 52	Q16_10 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Access to real past patient's experiences or testimonials	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T53	Table 53	Q16_11 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Treatments in clinics that offer convenience, such as walk-in clinics and quick & easy appointments	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T54	Table 54	Q16_12 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Having a collaborative consultation where my preferences are considered alongside medical expertise	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T55	Table 55	Q17_Summary - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T56	Table 56	Q17_1 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments tailored to my individual face	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T57	Table 57	Q17_2 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that improve my long-term skin health	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T58	Table 58	Q17_3 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments or procedures that have permanent effects	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T59	Table 59	Q17_4 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - A long-term treatment plan that evolves with my age	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T60	Table 60	Q17_5 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that deliver quick, visible results with minimal effort	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T61	Table 61	Q17_6 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that work gradually over time, with results that build up through regular or repeated sessions	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T62	Table 62	Q17_7 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments designed as a one-time or occasional transformation, rather than ongoing care	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T63	Table 63	Q17_8 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Tools that help visualise possible outcomes before treatment	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T64	Table 64	Q17_9 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that are reversible or adaptable if my preferences change	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T65	Table 65	Q17_10 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that are easy to fit into my lifestyle with short appointment times	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T66	Table 66	Q17_11 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics carried out only by verified healthcare professionals	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T67	Table 67	Q17A_Summary - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T68	Table 68	Q17A_1 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics that offer a combination approach of medical expertise with wellness and skin health	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T69	Table 69	Q17A_2 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics that look and feel more like wellness or self-care spaces than clinically led medical facilities	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T70	Table 70	Q17A_3 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics that look and feel more like clinically led medical facilities than wellness or self-care spaces	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T71	Table 71	Q20_Summary - To what extent do you agree or disagree with each of the following statements?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T72	Table 72	Q20_1 - To what extent do you agree or disagree with each of the following statements? - I like to stand out	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T73	Table 73	Q20_2 - To what extent do you agree or disagree with each of the following statements? - It's important to me that I adopt beauty products or treatments that help me stay on trend	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T74	Table 74	Q20_3 - To what extent do you agree or disagree with each of the following statements? - I am more likely to search for products or treatments promoted by influencers than those recommended by family/friends	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T75	Table 75	Q20_4 - To what extent do you agree or disagree with each of the following statements? - When choosing beauty products or treatments I like to use the same ones as my friends	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T76	Table 76	Q20_5 - To what extent do you agree or disagree with each of the following statements? - I am usually the first in my friendship group to try new beauty products and treatments	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T77	Table 77	Q20_6 - To what extent do you agree or disagree with each of the following statements? - I feel true to myself in my approach to beauty	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T78	Table 78	Q20_7 - To what extent do you agree or disagree with each of the following statements? - I struggle between wanting to look natural and the pressure to look perfect	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T79	Table 79	Q20_8 - To what extent do you agree or disagree with each of the following statements? - A flawless appearance is more important to me than showing my natural self	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T80	Table 80	Q20_9 - To what extent do you agree or disagree with each of the following statements? - Beauty products and treatments empower me and boost my confidence	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T81	Table 81	Q20_10 - To what extent do you agree or disagree with each of the following statements? - I feel comfortable experimenting with different beauty styles	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T82	Table 82	Q20_11 - To what extent do you agree or disagree with each of the following statements? - I feel under pressure to look a certain way	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T83	Table 83	Q20_12 - To what extent do you agree or disagree with each of the following statements? - Nowadays it's acceptable to be unique as a form of self-expression	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T84	Table 84	Q20_13 - To what extent do you agree or disagree with each of the following statements? - I like to buy beauty products or treatments from brands that are specifically for a diverse set of people	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T85	Table 85	Q20_14 - To what extent do you agree or disagree with each of the following statements? - I am more likely to buy beauty products or treatments from brands that celebrate cultural diversity	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T86	Table 86	Q20_15 - To what extent do you agree or disagree with each of the following statements? - I like the fact that men can now wear make up	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T87	Table 87	Q20_16 - To what extent do you agree or disagree with each of the following statements? - I am happy with my current approach to skincare	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T88	Table 88	Q20_17 - To what extent do you agree or disagree with each of the following statements? - I prefer to adopt a simple approach to skincare	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T89	Table 89	Q21_Summary - How important, if at all, is it for you that the aesthetic treatments industry does the following?	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T90	Table 90	Q21_1 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Offer a wide range of products or treatments for different skin types	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T91	Table 91	Q21_2 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Represent and include diverse genders, backgrounds, and appearances	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T92	Table 92	Q21_3 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Emphasise ethical and cruelty-free practices	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T93	Table 93	Q21_4 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Consider environmental impact	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T94	Table 94	Q21_5 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Consider social impact	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T95	Table 95	Q21_6 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Be transparent about ingredients	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T96	Table 96	Q21_7 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Be transparent about processes	Base: All Adults aged 18-25 in the UK/DE/IT/ES
T97	Table 97	Q21_8 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Be transparent about the risks	Base: All Adults aged 18-25 in the UK/DE/IT/ES



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 1

Q1 - In your opinion, what qualities, emotions, or attributes make someone 'beautiful'?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
APPEARANCE (NET)	433	112	72	162	87
	22%	22%	14%	32%	17%
		b		abd	
PHYSICAL APPEARANCE (SUB NET)	379	105	54	144	76
	19%	21%	11%	29%	15%
		bd		abd	b
Good looking / look / nice to look at / appearance / aesthetic attractiveness	193	63	13	75	42
	10%	13%	3%	15%	8%
		b		bd	b
Natural beauty / attraction	4	4	-	-	-
	*	1%	-	-	-
Hair	5	-	-	5	-
	*	-	-	1%	-
				abd	
Body	11	4	-	7	-
	1%	1%	-	1%	-

		bd			
Nice / clear skin	5 *	5 1% bcd	- -	- -	- -
Symmetry / symmetrical face	12 1%	4 1% b	- -	7 1% bd	- -
Facial attributes / pretty face	44 2%	10 2% d	7 1% d	27 5% abd	- -
Eyes	36 2%	13 3% d	11 2% d	12 2% d	- -
Great smile / laugh	69 3%	15 3%	16 3%	25 5%	14 3%
Others on physical appearance	75 4%	13 3%	12 2%	25 5% b	26 5% b
GENERAL APPEARANCE (SUB NET)	79 4%	15 3%	21 4%	27 5% a	16 3%
People take care of themselves to stay fresh / good self-care / keep themselves clean	57 3%	7 1%	17 3%	21 4% a	13 3%
Fashion / following trends / pretty clothes	14 1%	4 1%	- -	10 2% bd	- -
Others on outer appearance	19 1%	5 1%	7 1% c	1 * c	5 1%
PERSONALITY & CHARACTER (NET)	1343 67%	389 78%	309 62%	309 62%	336 67%

KIND / WARM / GOODHEARTED (SUB NET)	730	bcd			
	37%	280	89	161	201
Kind / kind heart / gentle / no ill will in their hearts / no ill intentions	509	bcd		b	bc
	25%	225	8	129	146
Caring	72	bcd		b	b
	4%	55	-	17	-
Warmth	5	bcd		bd	
	*	11%	-	3%	-
Supportive / they actively look to make the lives of those around them better / desire to help / helpful	81	bcd			
	4%	21	24	11	25
How they treat other people	24				
	1%	4%	5%	2%	5%
Actions / how they act	7	c			c
	*	12	-	12	-
Selfless / considerate / altruism / thoughtful / * attentive	76	2%	-	2%	-
	4%	bd		bd	
Generosity	38	7	-	-	-
	2%	1%	-	-	-
Friendliness	67	bcd			
		23	8	-	45
		5%	2%	-	9%
		bc	c		abc
		13	-	7	17
		3%	-	1%	3%
		b		b	b
		5	42	5	16

	3%	1%	8% acd	1%	3% ac
Forgiveness	4 *	4 1%	- -	- -	- -
Not judgemental / open minded	22 1%	18 4% bcd	- -	- -	4 1%
Loving / affectionate	54 3%	33 7% bcd	12 2% c	- -	9 2% c
Others on kind / warm / good hearted	43 2%	8 2%	15 3%	12 2%	7 1%
EMPATHETIC (SUB NET)	278 14%	50 10%	65 13%	56 11%	107 21% abc
Empathetic / compassionate / understanding	259 13%	44 9%	62 12%	55 11%	98 20% abc
Willingness to listen / good listener	20 1%	- -	4 1% c	- -	16 3% abc
Others on empathetic	9 *	8 2% bcd	- -	1 *	- -
AMBITIOUS / DETERMINED / CONFIDENT (SUB NET)	112 6%	41 8% cd	31 6% c	17 3%	22 4%
Confident/ *selfconfidence	63 3%	20 4%	21 4% d	12 2%	9 2%

Unafraid to speak the truth even if it can be hurtful / outspoken on your beliefs and willing to defend them / being able to stand up for what they believe is right / straightforward	7	7	-	-	-
	*	1% bcd	-	-	-
Ambitious / aspirations / people who have their goals	18	6	6	-	6
	1%	1% c	1% c	-	1% c
Brave	5	-	-	-	5
	*	-	-	-	1% abc
Conscientious / hardworking/ disciplined	5	5	-	-	-
	*	1% bcd	-	-	-
Others on ambitious / determined / confident	22	10	5	4	3
	1%	2%	1%	1%	1%
AUTHENTICITY (SUB NET)	73	21	20	16	16
	4%	4%	4%	3%	3%
Being truly themselves / real / genuine / authentic / being natural	60	18	18	12	12
	3%	4%	4%	2%	2%
Others on authenticity	16	5	3	6	3
	1%	1%	1%	1%	1%
GOOD MORALS & CHARACTER (SUB NET)	676	166	204	171	135
	34%	33% d	41% acd	34% d	27%
Good personality / character	255	76	69	75	36
	13%	15%	14%	15%	7%

Honesty / sincere / openness	215 11%	d 41 8%	d 88 18% acd	d 33 7%	54 11% c
Trustworthy / *reliability	29 1%	6 1% c	19 4% acd	- -	4 1%
Respectful / having manners / polite	92 5%	22 4%	24 5%	21 4%	24 5%
Loyalty	70 4%	13 3%	36 7% acd	7 1%	15 3%
(Key) values / morals	23 1%	8 2% b	- -	10 2% b	5 1% b
Humble / humility	37 2%	9 2% b	- -	22 4% abd	6 1% b
Beauty comes from inside / inner qualities / regardless of outer looks	45 2%	12 2%	10 2%	12 2%	11 2%
Others on moral attributes	42 2%	10 2%	14 3%	13 3%	6 1%
EXPRESSION OF EMOTIONS (SUB NET)	157 8%	33 7%	49 10% c	28 6%	47 9% c
Funny / sense of humour	75 4%	16 3%	29 6% d	17 3%	13 3%
Good emotions	5 *	- -	- -	5 1% abd	- -
Sensitive / emotional	37 2%	4 1%	5 1%	- -	28 6%

			c		abc
Emotional intelligence	22	-	14	-	8
	1%	-	3%	-	2%
			ac		ac
Others on expression of emotions	29	13	6	6	3
	1%	3%	1%	1%	1%
		d			
ATTITUDE (NET)	334	100	77	82	75
	17%	20%	15%	16%	15%
POSITIVE MINDSET (SUB NET)	187	67	35	36	49
	9%	13%	7%	7%	10%
		bc			
Positivity / positive emotions / mindset / optimistic	38	12	8	7	11
	2%	2%	2%	1%	2%
Happy / joy / cheerful / sunshine / radiant / infectious laughter	117	42	25	25	26
	6%	8%	5%	5%	5%
		bc			
Keep calm (in rough situations) / peace	29	6	5	5	13
	1%	1%	1%	1%	3%
Patience	13	13	-	-	-
	1%	3%	-	-	-
		bcd			
ATTITUDE IN GENERAL (SUB NET)	172	37	48	54	33
	9%	7%	10%	11%	7%
			d		
Attitude	14	-	-	14	-
	1%	-	-	3%	-
			abd		
The way they carry / represent themselves / how they speak / put together	19	7	5	7	-

	1%	1% d	1% d	1% d	-
Self love / comfortable in themselves / self respect	6 *	6 1% bcd	- -	- -	- -
Communicative / communication skills	13 1%	4 1%	- -	9 2% bd	- -
Charisma / charm / aura	38 2%	- -	20 4% ad	13 3% a	5 1% a
Zest for life / passion	4 *	- -	4 1% acd	- -	- -
Others on attitude in general	86 4%	19 4%	22 4%	17 3%	28 6%
GENERAL FEATURES (NET)	373 19%	62 12%	75 15%	103 21% ab	134 27% abc
Inside and out / nice person inside and out	16 1%	11 2% cd	5 1% cd	- -	- -
Clever / intelligent / good judgement to critical decision making process	70 4%	6 1%	8 2%	28 6% ab	28 6% ab
Features / traits / attributes	6 *	6 1% bcd	- -	- -	- -
Energy	4 *	4 1%	- -	- -	- -
Pure	15 1%	5 1%	- -	- -	10 2%

		bc			bc
Good / they show good qualities	17	-	10	-	7
	1%	-	2%	-	1%
			ac		ac
Simple	8	-	-	-	8
	*	-	-	-	2%
					abc
Anyone can be beautiful / beauty is in the eye of the beholder / everyone is beautiful in their own way	37	6	9	12	10
	2%	1%	2%	2%	2%
Beautiful - unspecified	9	-	4	5	-
	*	-	1%	1%	-
				ad	
Nice - unspecified / *likeable / nice to be around	102	4	27	29	41
	5%	1%	5%	6%	8%
			a	a	a
Education	16	-	-	-	16
	1%	-	-	-	3%
					abc
Culture	6	-	-	-	6
	*	-	-	-	1%
					abc
Elegance / grace / delicacy	5	-	-	5	-
	*	-	-	1%	-
				abd	
Others on general features	102	24	16	34	29
	5%	5%	3%	7%	6%
				b	
Don't know	322	60	97	72	93
	16%	12%	19%	14%	19%
			ac		a

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 2

Q2 - On balance, how confident or not are you as a person?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very confident	406 20%	90 18% d	114 23% d	147 29% abd	54 11%
Fairly confident	987 49%	239 48%	229 46%	257 51%	262 52% b
Not very confident	493 25%	143 29% c	123 25% c	81 16%	146 29% c
Not at all confident	82 4%	24 5% c	21 4% c	4 1%	34 7% c
NET: Very confident / Fairly confident	1393 70%	329 66%	344 69%	404 81% abd	316 63%
NET: Not very confident / Not at all confident	575 29%	166 33% c	144 29% c	85 17%	180 36% bc
Don't know	32 2%	5 1%	13 3% d	11 2% d	3 1%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 3

Q3 - Which, if any, of the following make you feel confident about yourself?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
My personality	1045 52%	253 51%	230 46%	306 61% abd	257 51%
My personal relationships	630 31%	155 31%	138 28%	175 35% b	162 32%
My overall appearance	609 30%	145 29%	167 33%	159 32%	138 28%
My hair	574 29%	147 29%	171 34% cd	129 26%	126 25%
Comments or reactions from people around me (friends, family, partner)	513 26%	131 26%	116 23%	151 30% bd	116 23%
How healthy I look	485 24%	120 24%	136 27% c	107 21%	122 24%
My body shape	483 24%	125 25% d	165 33% acd	99 20%	94 19%
My academic achievements	475 24%	130 26% bd	96 19%	162 32% abd	87 17%
My facial features (e.g. eye area, lips, face shape)	448 22%	124 25%	120 24%	103 21%	102 20%
My career	355 18%	91 18% d	91 18% d	108 22% d	65 13%
My weight	342 17%	95 19% cd	124 25% acd	65 13%	58 12%
The appearance of my facial skin (texture, tone, imperfections)	342 17%	79 16%	120 24% acd	72 14%	71 14%
My level of beauty	337 17%	83 17%	85 17%	90 18%	78 16%
My financial situation	271 14%	82 16% cd	86 17% cd	57 11%	46 9%
Comments or reactions I receive on social media	185 9%	51 10%	57 11%	39 8%	38 8%
How I compare myself to others online	143 7%	29 6%	40 8%	31 6%	43 9%
Visible signs of my level of stress	118 6%	35 7%	40 8% cd	21 4%	23 5%
NET: Physical appearance	1368 68%	335 67%	377 75% acd	334 67%	322 64%
NET: Social perception	894 45%	215 43%	227 45%	249 50% ad	202 40%
NET: Personal attributes and achievements	1468 73%	354 71%	340 68%	405 81% abd	369 74% b
None of these	75 4%	36 7% bc	8 2%	8 2%	23 5% bc
Prefer not to say	24 1%	5 1%	3 1%	5 1%	11 2% b
Don't know	58 3%	19 4% c	20 4% c	8 2%	11 2%

Proportions/Means: Columns Tested (5% risk level) - a/b/c/d
Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 4

Q4 - Which, if any, of the following make you feel not confident about yourself?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
My weight	601 30%	190 38% bcd	138 28%	132 26%	140 28%
My body shape	546 27%	166 33% bcd	130 26%	124 25%	125 25%
My financial situation	455 23%	139 28% cd	113 23%	104 21%	99 20%
The appearance of my facial skin (texture, tone, imperfections)	451 23%	126 25%	109 22%	99 20%	116 23%
Visible signs of my level of stress	419 21%	117 23% b	85 17%	97 19%	121 24% b
My overall appearance	396 20%	134 27%	91 18%	63 13%	109 22%

		bc	c		c
How I compare myself to others online	385	139	78	118	50
	19%	28%	16%	24%	10%
		bd	d	bd	
My facial features (e.g. eye area, lips, face shape)	351	108	74	84	85
	18%	22%	15%	17%	17%
		b			
My level of beauty	337	118	73	67	80
	17%	24%	15%	13%	16%
		bcd			
My hair	312	97	75	75	65
	16%	19%	15%	15%	13%
		d			
My academic achievements	267	60	74	62	71
	13%	12%	15%	12%	14%
My personality	266	79	69	50	68
	13%	16%	14%	10%	14%
		c			
Comments or reactions from people around me (friends, family, partner)	265	60	95	59	52
	13%	12%	19%	12%	10%
			acd		
My personal relationships	245	54	63	52	75
	12%	11%	13%	10%	15%
					c
My career	244	66	63	46	69
	12%	13%	13%	9%	14%
					c
How healthy I look	222	91	72	36	23
	11%	18%	14%	7%	5%
		cd	cd		
Comments or reactions I receive on social media	165	33	66	38	28
	8%	7%	13%	8%	6%

		acd			
NET: Physical appearance	1286	337	323	307	318
	64%	67%	65%	61%	64%
NET: Social perception	978	267	241	252	218
	49%	53%	48%	50%	44%
		d		d	
NET: Personal attributes and achievements	897	221	227	217	232
	45%	44%	45%	43%	46%
None of these	170	65	27	30	48
	9%	13%	5%	6%	10%
		bc			bc
Prefer not to say	49	9	9	15	16
	2%	2%	2%	3%	3%
Don't know	72	11	21	21	18
	4%	2%	4%	4%	4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 5

Q6 - Thinking about trying new beauty products and treatments, which if any of the following motivate you to try something new?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Positive reviews	852 43%	243 49% bd	201 40%	227 45% d	182 36%
Recommendation from friends or family	757 38%	193 39% d	207 41% d	205 41% d	152 30%
Seeing results on other people that it has worked	732 37%	183 37%	163 33%	229 46% abd	156 31%
Promotional/special offers and discount	536 27%	131 26% b	99 20%	158 32% b	148 30%
Products that address specific personal beauty needs	523 26%	137 27%	110 22%	135 27%	141 28% b
Social media trends	462 23%	144 29% cd	128 26% d	110 22% d	79 16%
Seeing products that offer something new or innovative	415 21%	95 19%	104 21%	111 22%	106 21%
Products promoted as sustainable, ecofriendly or ethically produced	371 19%	91 18%	96 19%	88 18%	95 19%
Influencer or celebrity endorsements	286 14%	65 13% d	117 23% acd	61 12%	43 9%
Influencer or celebrity use of the product or treatment	271 14%	79 16% d	71 14%	69 14%	52 10%
Advertising/Advertorials	232 12%	77 15% cd	72 14% cd	43 9%	40 8%
NET: Social influence and endorsements	1603 80%	408 82% d	406 81% d	421 84% d	367 73%
NET: Product attributes and ethics	760 38%	187 37%	175 35%	196 39%	201 40%
NET: Promotion and advertising	680 34%	179 36% b	147 29%	184 37% b	170 34%
None of these motivate me in trying something new	116 6%	40 8% bc	24 5%	18 4%	34 7% c
Don't know	79 4%	19 4%	22 4%	15 3%	23 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 6

Q7_Summary - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers.

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	Skincare creams, including moisturisers, repairing, and antiaging creams or serums	Injectable dermal fillers containing Hyaluronic acid (HA)	Injectable biostimulators products that trigger the production of collagen	Injectable Botox (or another Botulinum Toxin)	Chemical peel	Laser therapy	Microneedling
UNWEIGHTED BASE	2072	2072	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000	2000	2000
I'm not aware of this type of treatment	81	412	560	199	509	231	512
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	214	854	774	1149	552	544	637
	11%	43%	39%	57%	28%	27%	32%
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	334	560	530	506	463	714	518
	17%	28%	26%	25%	23%	36%	26%
I HAVE USED it in the past, but I would not consider using it in the future	207	48	33	36	162	135	123
	10%	2%	2%	2%	8%	7%	6%
I HAVE USED it in the past, and I would consider using it in the future	415	55	37	47	182	211	121
	21%	3%	2%	2%	9%	11%	6%
I am CURRENTLY USING it	711	16	10	12	85	117	33
	36%	1%	*	1%	4%	6%	2%
NET: Past or current users	1333	120	80	96	429	462	277
	67%	6%	4%	5%	21%	23%	14%
NET: Considerers	1460	631	577	565	730	1041	672
	73%	32%	29%	28%	37%	52%	34%
NET: Would not consider	420	902	807	1185	714	679	760
	21%	45%	40%	59%	36%	34%	38%
Don't know	38	55	57	51	46	48	56
	2%	3%	3%	3%	2%	2%	3%

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 7

Q7_1 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Skincare creams, including moisturisers, repairing, and antiaging creams or serums

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
I'm not aware of this type of treatment	81 4%	16 3%	32 6% ac	15 3%	19 4%
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	214 11%	47 9%	64 13%	53 11%	49 10%
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	334 17%	71 14%	93 19%	77 15%	94 19%
I HAVE USED it in the past, but I would not consider using it in the future	207 10%	36 7%	72 14% acd	51 10%	47 9%
I HAVE USED it in the past, and I would consider using it in the future	415 21%	114 23%	109 22%	96 19%	96 19%
I am CURRENTLY USING it	711 36%	208 42% b	117 23%	203 41% b	182 36% b
NET: Past or current users	1333 67%	359 72% bd	298 60%	351 70% b	326 65%
NET: Considerers	1460 73%	393 79% b	319 64%	376 75% b	372 74% b
NET: Would not consider	420 21%	83 17%	136 27% acd	104 21%	97 19%
Don't know	38 2%	7 1%	13 3% c	5 1%	13 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 8

Q7_2 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Injectable dermal fillers containing Hyaluronic acid (HA)

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
I'm not aware of this type of treatment	412	133	116	80	82
	21%	27% cd	23% cd	16%	16%
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	854	188	195	233	237
	43%	38%	39%	47% ab	47% ab
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	560	121	143	153	143
	28%	24%	29%	31% a	29%
I HAVE USED it in the past, but I would not consider using it in the future	48	14	13	11	11
	2%	3%	3%	2%	2%
I HAVE USED it in the past, and I would consider using it in the future	55	26	13	10	7
	3%	5% cd	3%	2%	1%
I am CURRENTLY USING it	16	5	3	5	2
	1%	1%	1%	1%	*
NET: Past or current users	120	45	30	25	20
	6%	9% cd	6%	5%	4%
NET: Considerers	631	152	159	167	153
	32%	30%	32%	33%	31%
NET: Would not consider	902	202	208	244	248
	45%	40%	42%	49% ab	50% ab
Don't know	55	12	16	9	18
	3%	2%	3%	2%	4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 9

Q7_3 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Injectable biostimulators - products that trigger the production of collagen

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
I'm not aware of this type of treatment	560	174	133	125	128
	28%	35% bcd	27%	25%	26%
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	774	183	188	186	217
	39%	37%	38%	37%	43% a
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	530	112	134	156	128
	26%	22%	27%	31% a	26%
I HAVE USED it in the past, but I would not consider using it in the future	33	5	11	11	7
	2%	1%	2%	2%	1%
I HAVE USED it in the past, and I would consider using it in the future	37	8	11	11	6
	2%	2%	2%	2%	1%
I am CURRENTLY USING it	10	3	3	3	2
	*	1%	1%	1%	*
NET: Past or current users	80	15	25	25	15
	4%	3%	5%	5%	3%
NET: Considerers	577	123	148	170	136
	29%	25%	30%	34% ad	27%
NET: Would not consider	807	188	199	197	223
	40%	38%	40%	39%	45% a
Don't know	57	15	21	9	12
	3%	3%	4% c	2%	2%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 10

Q7_4 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Injectable Botox (or another Botulinum Toxin)

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
I'm not aware of this type of treatment	199	57	52	35	53
	10%	11% c	10%	7%	11%
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	1149	281	260	289	319
	57%	56%	52%	58%	64% ab
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	506	129	142	136	98
	25%	26% d	28% d	27% d	20%
I HAVE USED it in the past, but I would not consider using it in the future	36	5	14	11	6
	2%	1%	3%	2%	1%
I HAVE USED it in the past, and I would consider using it in the future	47	13	13	13	8
	2%	3%	3%	3%	2%
I am CURRENTLY USING it	12	2	4	6	1
	1%	*	1%	1%	*
NET: Past or current users	96	20	31	30	15
	5%	4%	6% d	6% d	3%
NET: Considerers	565	143	160	155	108
	28%	29% d	32% d	31% d	22%
NET: Would not consider	1185	286	274	301	325
	59%	57%	55%	60%	65% ab
Don't know	51	13	14	9	14
	3%	3%	3%	2%	3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 11

Q7_5 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Chemical peel

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
I'm not aware of this type of treatment	509	122	104	123	160
	25%	24%	21%	25%	32% abc
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	552	163	119	122	148
	28%	33% bc	24%	24%	30% b
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	463	140	105	118	100
	23%	28% bd	21%	24%	20%
I HAVE USED it in the past, but I would not consider using it in the future	162	23	62	45	32
	8%	5%	12% ad	9% a	6%
I HAVE USED it in the past, and I would consider using it in the future	182	28	69	54	31
	9%	6%	14% ad	11% ad	6%
I am CURRENTLY USING it	85	11	31	30	14
	4%	2%	6% ad	6% ad	3%
NET: Past or current users	429	62	161	129	77
	21%	12%	32% acd	26% ad	15%
NET: Considerers	730	179	204	202	145
	37%	36% d	41% d	40% d	29%
NET: Would not consider	714	186	181	166	181
	36%	37%	36%	33%	36%
Don't know	46	13	10	9	14
	2%	3%	2%	2%	3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 12

Q7_6 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Laser therapy

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
I'm not aware of this type of treatment	231	63	49	27	93
	12%	13% c	10% c	5%	19% abc
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	544	179	142	81	143
	27%	36% bcd	28% c	16%	29% c
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	714	198	175	190	151
	36%	40% d	35%	38% d	30%
I HAVE USED it in the past, but I would not consider using it in the future	135	15	45	45	30
	7%	3%	9% a	9% a	6% a
I HAVE USED it in the past, and I would consider using it in the future	211	20	53	92	46
	11%	4%	11% a	18% abd	9% a
I am CURRENTLY USING it	117	13	20	59	24
	6%	3%	4%	12% abd	5%
NET: Past or current users	462	48	118	196	99
	23%	10%	24% a	39% abd	20% a
NET: Considerers	1041	231	249	341	220
	52%	46%	50%	68% abd	44%
NET: Would not consider	679	194	187	125	173
	34%	39% c	37% c	25%	35% c
Don't know	48	12	16	7	14
	2%	2%	3% c	1%	3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 13

Q7_7 - For each of the products or treatments below, please select the statement that best applies to you. Please think about products and treatments and not cosmetics such as make-up or concealers. - Microneedling

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
I'm not aware of this type of treatment	512 26%	100 20%	93 19%	113 23%	206 41% abc
I'm aware but I HAVEN'T TRIED IT, and I would not consider it in the future	637 32%	174 35% b	136 27%	180 36% bd	148 30%
I'm aware but I HAVEN'T TRIED IT, but I would consider it in the future	518 26%	164 33% cd	134 27% d	129 26% d	91 18%
I HAVE USED it in the past, but I would not consider using it in the future	123 6%	21 4%	51 10% acd	31 6%	20 4%
I HAVE USED it in the past, and I would consider using it in the future	121 6%	19 4%	59 12% acd	26 5%	18 4%
I am CURRENTLY USING it	33 2%	9 2%	13 3% d	7 1%	4 1%
NET: Past or current users	277 14%	49 10%	123 25% acd	63 13% d	41 8%
NET: Considerers	672 34%	192 38% d	206 41% cd	162 32% d	112 22%
NET: Would not consider	760 38%	195 39%	187 37%	211 42% d	168 34%
Don't know	56 3%	13 3%	14 3%	14 3%	14 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 14

Q8_Summary - To what extent do you agree or disagree with the following statements?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	Real beauty for me is a healthy body and mind	The appearance of my skin affects how I feel about myself	I would use skin treatments to reduce the first signs of ageing	If you don't treat signs of ageing, you look like you have neglected yourself	I edit photos of myself or apply filters before uploading them on social media	I love to share selfies of myself on social media	It is important for me that my appearance reflects my true self	I am comfortable with who I am, regardless of societal expectations of appearance
UNWEIGHTED BASE	2072	2072	2072	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000	2000	2000	2000
Strongly agree	602	514	300	196	185	255	517	391
Tend to agree	744	743	593	492	365	445	791	652
	37%	37%	30%	25%	18%	22%	40%	33%
Neither agree nor disagree	413	370	533	542	407	468	419	509
	21%	18%	27%	27%	20%	23%	21%	25%
Tend to disagree	146	218	308	428	391	387	146	286
	7%	11%	15%	21%	20%	19%	7%	14%
Strongly disagree	55	109	181	291	603	394	84	122
	3%	5%	9%	15%	30%	20%	4%	6%
NET: Strongly / tend to agree	1346	1257	893	688	550	700	1308	1044
	67%	63%	45%	34%	28%	35%	65%	52%
NET: Strongly / tend to disagree	201	327	488	719	993	780	231	409
	10%	16%	24%	36%	50%	39%	12%	20%
Don't know	40	47	86	50	49	52	42	39
	2%	2%	4%	3%	2%	3%	2%	2%

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 15

Q8_1 - To what extent do you agree or disagree with the following statements? - Real beauty for me is a healthy body and mind

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	602 30%	147 29%	124 25%	171 34%	160 32%
				b	b
Tend to agree	744 37%	210 42%	171 34%	163 33%	199 40%
		bc			c
Neither agree nor disagree	413 21%	104 21%	131 26%	102 20%	77 15%
		d	cd	d	
Tend to disagree	146 7%	24 5%	45 9%	40 8%	37 7%
			a		
Strongly disagree	55 3%	10 2%	16 3%	17 3%	12 2%
NET: Strongly / tend to agree	1346 67%	357 71%	295 59%	334 67%	359 72%
		b		b	b
NET: Strongly / tend to disagree	201 10%	34 7%	61 12%	57 11%	48 10%
			a	a	
Don't know	40 2%	4 1%	14 3%	7 1%	15 3%
			a		a

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 16

Q8_2 - To what extent do you agree or disagree with the following statements? - The appearance of my skin affects how I feel about myself

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	514 26%	141 28% d	126 25% d	153 31% d	94 19%
Tend to agree	743 37%	192 38% b	159 32%	181 36%	210 42% b
Neither agree nor disagree	370 18%	98 20%	105 21%	83 17%	83 17%
Tend to disagree	218 11%	38 8%	65 13% ac	43 9%	71 14% ac
Strongly disagree	109 5%	23 5%	26 5%	29 6%	30 6%
NET: Strongly / tend to agree	1257 63%	333 67% b	285 57%	334 67% b	304 61%
NET: Strongly / tend to disagree	327 16%	61 12%	92 18% a	73 15%	101 20% ac
Don't know	47 2%	7 1%	18 4% a	11 2%	11 2%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 17

Q8_3 - To what extent do you agree or disagree with the following statements? - I would use skin treatments to reduce the first signs of ageing

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	300 15%	80 16%	77 15%	82 16%	61 12%
Tend to agree	593 30%	169 34% bc	119 24%	120 24%	184 37% bc
Neither agree nor disagree	533 27%	127 25%	141 28%	139 28%	126 25%
Tend to disagree	308 15%	65 13%	100 20% acd	76 15%	67 13%
Strongly disagree	181 9%	36 7%	46 9%	61 12% ad	38 8%
NET: Strongly / tend to agree	893 45%	250 50% bc	196 39%	202 40%	245 49% bc
NET: Strongly / tend to disagree	488 24%	101 20%	147 29% ad	137 27% ad	105 21%
Don't know	86 4%	22 4%	16 3%	22 4%	24 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 18

Q8_4 - To what extent do you agree or disagree with the following statements? - If you don't treat signs of ageing, you look like you have neglected yourself

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	196 10%	52 10%	38 8%	65 13% bd	41 8%
Tend to agree	492 25%	101 20%	112 22%	146 29% ab	134 27% a
Neither agree nor disagree	542 27%	136 27%	132 26%	127 25%	147 29%
Tend to disagree	428 21%	125 25% c	122 24% c	83 17%	99 20%
Strongly disagree	291 15%	79 16%	83 17%	64 13%	64 13%
NET: Strongly / tend to agree	688 34%	153 31%	150 30%	211 42% abd	175 35%
NET: Strongly / tend to disagree	719 36%	204 41% cd	205 41% cd	147 29%	163 33%
Don't know	50 3%	8 2%	13 3%	15 3%	15 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 19

Q8_5 - To what extent do you agree or disagree with the following statements? - I edit photos of myself or apply filters before uploading them on social media

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	185 9%	57 11% cd	57 11% cd	36 7%	36 7%
Tend to agree	365 18%	91 18% d	103 21% d	106 21% d	65 13%
Neither agree nor disagree	407 20%	99 20%	132 26% acd	85 17%	90 18%
Tend to disagree	391 20%	108 22%	91 18%	91 18%	101 20%
Strongly disagree	603 30%	141 28% b	99 20%	171 34% b	191 38% ab
NET: Strongly / tend to agree	550 28%	147 29% d	159 32% d	143 29% d	101 20%
NET: Strongly / tend to disagree	993 50%	250 50% b	190 38%	262 52% b	292 58% ab
Don't know	49 2%	4 1%	18 4% a	10 2%	17 3% a

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.


25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS
5 Mar 2026
Table 20
Q8_6 - To what extent do you agree or disagree with the following statements? - I love to share selfies of myself on social media
Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	255 13%	66 13% d	65 13% d	91 18% abd	33 7%
Tend to agree	445 22%	103 21%	107 21%	121 24%	115 23%
Neither agree nor disagree	468 23%	110 22%	138 28% c	90 18%	130 26% c
Tend to disagree	387 19%	107 21%	86 17%	99 20%	94 19%
Strongly disagree	394 20%	105 21%	90 18%	87 17%	112 22%
NET: Strongly / tend to agree	700 35%	169 34%	171 34%	212 42% abd	148 30%
NET: Strongly / tend to disagree	780 39%	212 42% b	176 35%	186 37%	206 41%
Don't know	52 3%	9 2%	15 3%	11 2%	17 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d
Overlap formulae used.
This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 21

Q8_7 - To what extent do you agree or disagree with the following statements? - It is important for me that my appearance reflects my true self

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	517 26%	119 24%	119 24%	177 35% abd	102 20%
Tend to agree	791 40%	229 46% bc	178 36%	172 34%	213 43% bc
Neither agree nor disagree	419 21%	99 20%	130 26% ac	84 17%	107 21%
Tend to disagree	146 7%	27 5%	41 8%	33 7%	45 9% a
Strongly disagree	84 4%	18 4%	23 5%	24 5%	19 4%
NET: Strongly / tend to agree	1308 65%	348 70% bd	297 59%	349 70% bd	314 63%
NET: Strongly / tend to disagree	231 12%	45 9%	64 13%	58 12%	64 13%
Don't know	42 2%	8 2%	9 2%	10 2%	15 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 22

Q8_8 - To what extent do you agree or disagree with the following statements? - I am comfortable with who I am, regardless of societal expectations of appearance

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	391 20%	92 18%	93 19%	131 26% abd	74 15%
Tend to agree	652 33%	174 35% b	137 27%	175 35% b	166 33%
Neither agree nor disagree	509 25%	124 25%	150 30% c	111 22%	124 25%
Tend to disagree	286 14%	77 15% c	80 16% c	54 11%	75 15% c
Strongly disagree	122 6%	27 5%	26 5%	21 4%	48 10% abc
NET: Strongly / tend to agree	1044 52%	267 53% b	231 46%	306 61% abd	240 48%
NET: Strongly / tend to disagree	409 20%	103 21% c	106 21% c	75 15%	124 25% c
Don't know	39 2%	6 1%	13 3%	9 2%	12 2%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

[Return to Index](#)



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 23

Q9 - Thinking specifically about injectable skincare treatments for your face or neck, when, if at all, are you likely to have this treatment...? By injectable skincare treatments we are referring to: Hyaluronic Acid (HA) dermal fillers, Biostimulators, Botox (or another Botulinum Toxin)

Base: All adults 18-25 who would consider or are past/current users of injectables

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	1100	231	300	306	263
WEIGHTED BASE	1030	225	285	285	234
Within the next year	80 8%	22 10% d	26 9%	21 8%	11 5%
In more than 1 year up to 2 years from now	174 17%	42 19%	56 19%	41 14%	36 15%
In more than 2 years up to 5 years from now	225 22%	44 19%	64 22%	60 21%	57 24%
In more than 5 years up to 10 years from now	186 18%	35 15%	56 19%	55 19%	40 17%
In more than 10 years from now	199 19%	46 20%	40 14%	58 20% b	56 24% b
Don't know	165 16%	37 17%	45 16%	48 17%	34 15%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 24

Q10 - For which, if any, of the following reasons do you or would you have injectable skincare treatments for your face or neck? By injectable skincare treatments we are referring to: Hyaluronic Acid (HA) dermal fillers, Biostimulators, Botox (or another Botulinum Toxin)

Base: All adults aged 18-25 who are likely to have injectables treatment in future

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	925	191	254	256	224
WEIGHTED BASE	864	188	240	236	200
To improve the overall quality of my skin (e.g. hydration, texture, smoothness, pores, etc.)	330	91	80	87	72
	38%	48% bcd	33%	37%	36%
To reduce the early signs of ageing (e.g. fine lines, wrinkles, loss of firmness, etc.)	329	78	84	83	85
	38%	41%	35%	35%	42%
To give my skin a radiant, healthy-looking glow	292	78	83	84	47
	34%	42% d	34% d	36% d	23%
To enhance the appearance of my lips (e.g. shape, definition, volume, etc.)	258	46	80	66	66
	30%	25%	33%	28%	33%
To redefine or enhance certain facial features (e.g. facial contours, definition, volume, etc.)	251	49	70	77	54
	29%	26%	29%	33%	27%
To look more rested and less tired, especially around the eyes	241	52	71	60	57
	28%	28%	30%	26%	28%
To reduce the appearance of scars	172	47	59	40	27
	20%	25% d	25% cd	17%	13%
None of these	16	3	3	8	2
	2%	2%	1%	3%	1%
Don't know	11	3	1	3	4
	1%	1%	*	1%	2%

Proportions/Means: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



5 Mar 2026

Table 25

Q11 - Which, if any, of the following reasons describe why you have not used injectable skincare treatments for your face? By injectable skincare treatments we are referring to: Hyaluronic acid dermal fillers, Biostimulators, Skin Boosters, Botox (or another Botulinum Toxin)?

Base: All adults aged 18-25 who have not used injectables but are aware of them

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	1655	398	407	436	414
WEIGHTED BASE	1655	392	405	435	422
It's too expensive	431	103	111	99	117
	26%	26%	27%	23%	28%
Might not like the outcome	352	97	81	88	85
	21%	25%	20%	20%	20%
Side effects	348	105	85	83	75
	21%	27%	21%	19%	18%
It won't look natural / I prefer to look natural	348	110	69	97	71
	21%	28%	17%	22%	17%
I don't like needles	332	89	92	91	59
	20%	23%	23%	21%	14%
I want to keep my unique/individual look	313	69	68	98	77
	19%	18%	17%	23%	18%
Don't think/unsure it is worth the money	312	79	77	79	77
	19%	20%	19%	18%	18%
Prefer to use other less invasive cosmetic treatments	266	71	45	84	66
	16%	18%	11%	19%	16%
Pain during the treatment	260	82	71	55	52
	16%	21%	17%	13%	12%
Fear of having disproportionate features	245	59	50	86	49
	15%	15%	12%	20%	12%
Uncertain about its effectiveness	231	76	51	54	50
	14%	19%	13%	12%	12%
I don't know a credible/trustworthy practitioner	192	58	49	50	34
	12%	15%	12%	12%	8%
Ethical concerns over the products (e.g. whether it was crueltyfree/not tested on animals, vegan, natural, etc.)	186	44	54	54	32
	11%	11%	13%	13%	8%
Results will not last long/it needs regular touch-up treatments	179	50	42	44	42
	11%	13%	10%	10%	10%
Length of recovery time	160	38	56	34	32
	10%	10%	14%	8%	8%
Worried about what my family/friends/work colleagues will think	150	39	42	41	28
	9%	10%	10%	9%	7%
I am considering using Hyaluronic acid injectable dermal fillers, but I have not made a decision yet	119	20	36	33	29
	7%	5%	9%	8%	7%
Another reason	40	11	13	5	12
	2%	3%	3%	1%	3%
Don't think I need it/ not for me	242	63	42	55	83
	15%	16%	10%	13%	20%
Don't know	36	9	7	14	6
	2%	2%	2%	3%	1%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.


25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS
5 Mar 2026
Table 26
Q12_Summary - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck?
Base: All Adults aged 18-25 in the UK/DE/IT/ES

	It's okay if aesthetic treatments are noticeable as long as I like the result	I prefer results that are subtle and not obvious to others	I think any aesthetic treatment is noticeable on the person who had it	I prefer aesthetic treatments that maintain a natural look over those that look artificial	I enjoy experimenting with different styles and looks but keep changes subtle	I view aesthetic treatments as part of my self-care routine	Enhancing my appearance through aesthetic treatment is a form of selfexpression for me
UNWEIGHTED BASE	2072	2072	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000	2000	2000
Strongly agree	314	598	308	727	296	213	234
Tend to agree	523	604	613	548	663	409	430
	26%	30%	31%	27%	33%	20%	22%
Neither agree nor disagree	454	387	505	335	442	463	535
	23%	19%	25%	17%	22%	23%	27%
Tend to disagree	330	154	310	151	303	350	350
	17%	8%	15%	8%	15%	18%	17%
Strongly disagree	187	96	137	104	156	327	253
	9%	5%	7%	5%	8%	16%	13%
NET: Strongly / tend to agree	837	1202	922	1275	959	622	664
	42%	60%	46%	64%	48%	31%	33%
NET: Strongly / tend to disagree	518	250	447	254	459	677	602
	26%	13%	22%	13%	23%	34%	30%
Not applicable	121	108	65	86	86	171	139
	6%	5%	3%	4%	4%	9%	7%
Don't know	70	52	62	49	53	67	59
	4%	3%	3%	2%	3%	3%	3%

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 27

Q12_1 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - It's okay if aesthetic treatments are noticeable as long as I like the result

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	314 16%	88 18% d	100 20% cd	69 14%	58 12%
Tend to agree	523 26%	155 31% cd	130 26%	124 25%	113 23%
Neither agree nor disagree	454 23%	105 21%	123 25%	119 24%	107 21%
Tend to disagree	330 17%	80 16%	59 12%	81 16%	111 22% abc
Strongly disagree	187 9%	23 5%	36 7%	60 12% ab	68 14% ab
NET: Strongly / tend to agree	837 42%	243 49% cd	230 46% cd	193 39%	171 34%
NET: Strongly / tend to disagree	518 26%	103 21%	95 19%	141 28% ab	179 36% abc
Not applicable	121 6%	36 7%	36 7%	27 5%	22 4%
Don't know	70 4%	12 2%	17 3%	20 4%	21 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 28

Q12_2 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I prefer results that are subtle and not obvious to others

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	598 30%	142 28% b	113 23%	169 34% b	175 35% ab
Tend to agree	604 30%	179 36% bcd	140 28%	146 29%	138 28%
Neither agree nor disagree	387 19%	94 19%	128 26% acd	80 16%	86 17%
Tend to disagree	154 8%	28 6%	51 10% ac	33 7%	41 8%
Strongly disagree	96 5%	26 5%	30 6% d	27 5% d	14 3%
NET: Strongly / tend to agree	1202 60%	321 64% b	253 51%	315 63% b	313 63% b
NET: Strongly / tend to disagree	250 13%	54 11%	81 16% ad	60 12%	55 11%
Not applicable	108 5%	24 5%	23 5%	30 6%	31 6%
Don't know	52 3%	7 1%	15 3%	15 3%	15 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 29

Q12_3 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I think any aesthetic treatment is noticeable on the person who had it

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	308 15%	66 13%	55 11%	129 26% abd	58 12%
Tend to agree	613 31%	145 29%	144 29%	182 36% abd	142 28%
Neither agree nor disagree	505 25%	152 30% c	126 25% c	94 19%	133 27% c
Tend to disagree	310 15%	75 15% c	95 19% c	49 10%	91 18% c
Strongly disagree	137 7%	27 5%	38 8%	26 5%	46 9% ac
NET: Strongly / tend to agree	922 46%	211 42%	200 40%	310 62% abd	200 40%
NET: Strongly / tend to disagree	447 22%	102 20% c	133 27% ac	75 15%	137 27% ac
Not applicable	65 3%	16 3%	22 4%	11 2%	16 3%
Don't know	62 3%	19 4%	20 4% c	9 2%	14 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 30

Q12_4 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I prefer aesthetic treatments that maintain a natural look over those that look artificial

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	727 36%	171 34%	140 28%	207 41% ab	209 42% ab
Tend to agree	548 27%	164 33% bc	129 26%	122 24%	133 27%
Neither agree nor disagree	335 17%	82 16%	108 22% cd	62 12%	82 16%
Tend to disagree	151 8%	21 4%	49 10% ad	49 10% ad	31 6%
Strongly disagree	104 5%	29 6% d	36 7% d	26 5% d	12 2%
NET: Strongly / tend to agree	1275 64%	334 67% b	269 54%	329 66% b	343 69% b
NET: Strongly / tend to disagree	254 13%	50 10%	86 17% ad	76 15% ad	42 8%
Not applicable	86 4%	24 5%	20 4%	20 4%	22 4%
Don't know	49 2%	9 2%	17 3%	13 3%	11 2%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 31

Q12_5 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I enjoy experimenting with different styles and looks but keep changes subtle

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	296 15%	70 14%	70 14%	71 14%	86 17%
Tend to agree	663 33%	180 36% b	147 29%	152 30%	184 37% bc
Neither agree nor disagree	442 22%	119 24%	115 23%	107 21%	101 20%
Tend to disagree	303 15%	69 14%	95 19% ad	74 15%	65 13%
Strongly disagree	156 8%	28 6%	38 8%	56 11% abd	34 7%
NET: Strongly / tend to agree	959 48%	249 50%	217 43%	223 45%	270 54% bc
NET: Strongly / tend to disagree	459 23%	96 19%	133 27% ad	131 26% ad	99 20%
Not applicable	86 4%	25 5%	28 6% d	21 4%	12 2%
Don't know	53 3%	11 2%	8 2%	18 4% b	17 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 32

Q12_6 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - I view aesthetic treatments as part of my self-care routine

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	213 11%	54 11%	57 11%	62 12%	39 8%
				d	
Tend to agree	409 20%	92 18%	102 20%	99 20%	116 23%
Neither agree nor disagree	463 23%	127 25%	131 26%	106 21%	98 20%
		d	d		
Tend to disagree	350 18%	91 18%	93 19%	71 14%	95 19%
				c	
Strongly disagree	327 16%	72 14%	52 10%	107 21%	95 19%
				ab	b
NET: Strongly / tend to agree	622 31%	146 29%	159 32%	162 32%	155 31%
NET: Strongly / tend to disagree	677 34%	163 33%	145 29%	178 36%	191 38%
				b	b
Not applicable	171 9%	50 10%	44 9%	35 7%	41 8%
Don't know	67 3%	13 3%	20 4%	18 4%	15 3%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 33

Q12_7 - To what extent do you agree or disagree with each of the following statements about aesthetic treatments for your face or neck? - Enhancing my appearance through aesthetic treatment is a form of self-expression for me

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	234 12%	63 13%	60 12%	60 12%	52 10%
Tend to agree	430 22%	92 18%	109 22%	107 21%	122 24% a
Neither agree nor disagree	535 27%	139 28%	135 27%	132 26%	129 26%
Tend to disagree	350 17%	92 18%	100 20%	80 16%	77 15%
Strongly disagree	253 13%	68 14%	47 9%	72 14%	66 13%
NET: Strongly / tend to agree	664 33%	155 31%	169 34%	167 33%	174 35%
NET: Strongly / tend to disagree	602 30%	160 32%	147 29%	151 30%	144 29%
Not applicable	139 7%	38 8%	36 7%	30 6%	34 7%
Don't know	59 3%	8 2%	12 2%	20 4%	20 4%
				a	a

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 34

Q13A_Summary - To what extent do you agree or disagree with the following statements about your facial appearance?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	I like to try new ways to enhance my facial features	I am always trying out new looks on me	I like to use technology (e.g., virtual try-on services, photo editing apps, etc.) to see different looks on me	I don't like to try new beauty products or treatments	I rarely step out of my comfort zone when it comes to my facial appearance
UNWEIGHTED BASE	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000
Strongly agree	268	208	244	202	306
Tend to agree	649	513	492	458	700
	32%	26%	25%	23%	35%
Neither agree nor disagree	543	521	475	506	511
	27%	26%	24%	25%	26%
Tend to disagree	317	440	395	516	311
	16%	22%	20%	26%	16%
Strongly disagree	161	244	335	260	105
	8%	12%	17%	13%	5%
NET: Strongly / tend to agree	917	721	736	660	1006
	46%	36%	37%	33%	50%
NET: Strongly / tend to disagree	477	684	730	777	416
	24%	34%	36%	39%	21%
Don't know	63	74	59	57	66
	3%	4%	3%	3%	3%

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 35

Q13A_1 - To what extent do you agree or disagree with the following statements about your facial appearance? - I like to try new ways to enhance my facial features

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	268 13%	57 11%	57 11%	85 17% ab	69 14%
Tend to agree	649 32%	164 33%	146 29%	156 31%	182 36% b
Neither agree nor disagree	543 27%	138 28%	132 26%	136 27%	137 27%
Tend to disagree	317 16%	91 18% d	98 20% cd	73 15%	55 11%
Strongly disagree	161 8%	38 8%	51 10%	38 8%	34 7%
NET: Strongly / tend to agree	917 46%	221 44%	204 41%	241 48% b	251 50% b
NET: Strongly / tend to disagree	477 24%	129 26% d	149 30% cd	111 22%	89 18%
Don't know	63 3%	12 2%	15 3%	13 3%	23 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 36

Q13A_2 - To what extent do you agree or disagree with the following statements about your facial appearance? - I am always trying out new looks on me

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	208 10%	44 9%	68 14% ac	39 8%	56 11%
Tend to agree	513 26%	143 29% c	136 27% c	97 19%	137 27% c
Neither agree nor disagree	521 26%	137 27%	112 22%	142 28% b	130 26%
Tend to disagree	440 22%	121 24%	97 19%	119 24%	103 21%
Strongly disagree	244 12%	40 8%	67 13% a	82 16% ad	55 11%
NET: Strongly / tend to agree	721 36%	187 37% c	205 41% c	136 27%	193 39% c
NET: Strongly / tend to disagree	684 34%	162 32%	164 33%	201 40% abd	158 32%
Don't know	74 4%	15 3%	19 4%	21 4%	19 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 37

Q13A_3 - To what extent do you agree or disagree with the following statements about your facial appearance? - I like to use technology (e.g., virtual try-on services, photo editing apps, etc.) to see different looks on me

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	244 12%	64 13%	61 12%	65 13%	54 11%
Tend to agree	492 25%	153 31% bcd	108 22%	123 25%	108 22%
Neither agree nor disagree	475 24%	96 19%	132 26% a	118 24%	129 26% a
Tend to disagree	395 20%	96 19%	110 22%	93 19%	95 19%
Strongly disagree	335 17%	78 16%	78 16%	86 17%	93 19%
NET: Strongly / tend to agree	736 37%	217 43% bd	170 34%	188 38%	162 32%
NET: Strongly / tend to disagree	730 36%	174 35%	188 38%	179 36%	188 38%
Don't know	59 3%	13 3%	10 2%	15 3%	21 4%

Proportions/Means: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 38

Q13A_4 - To what extent do you agree or disagree with the following statements about your facial appearance? - I don't like to try new beauty products or treatments

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	202 10%	46 9%	73 15% acd	48 10%	35 7%
Tend to agree	458 23%	118 24%	140 28% cd	99 20%	101 20%
Neither agree nor disagree	506 25%	121 24%	129 26%	132 26%	124 25%
Tend to disagree	516 26%	133 27% b	95 19%	136 27% b	153 31% b
Strongly disagree	260 13%	70 14% b	49 10%	74 15% b	67 13%
NET: Strongly / tend to agree	660 33%	164 33%	213 43% acd	146 29%	137 27%
NET: Strongly / tend to disagree	777 39%	203 41% b	143 29%	211 42% b	220 44% b
Don't know	57 3%	12 2%	15 3%	11 2%	19 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 39

Q13A_5 - To what extent do you agree or disagree with the following statements about your facial appearance? - I rarely step out of my comfort zone when it comes to my facial appearance

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	306 15%	86 17% d	74 15%	91 18% d	56 11%
Tend to agree	700 35%	186 37%	164 33%	168 34%	182 36%
Neither agree nor disagree	511 26%	118 24%	122 24%	121 24%	150 30%
Tend to disagree	311 16%	73 15%	91 18%	76 15%	71 14%
Strongly disagree	105 5%	28 6%	27 5%	28 6%	22 4%
NET: Strongly / tend to agree	1006 50%	271 54%	239 48%	259 52%	238 48%
NET: Strongly / tend to disagree	416 21%	101 20%	118 24%	104 21%	93 19%
Don't know	66 3%	10 2%	21 4% a	16 3%	20 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

Table 40

Q138 - Still thinking about your facial appearance, which, if any, of the following do you ever use nowadays?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Temporary products or treatments (e.g. makeup, coloured contact lenses, temporary tattoos, etc.)	579	142	152	153	132
	29%	28%	30%	31%	26%
Photo Editing Apps (e.g. FaceTune or Photoshop) to alter features, try new hair colours, or apply digital makeup to images of myself	471	115	154	123	79
	24%	23% d	31% acd	25% d	16%
Virtual Try-On Services (e.g. GoogleTryOn, Sephora's virtual artist, L'Oreal's Modiface) to virtually try different products (e.g. beauty products, hair colourant etc.) in real-time using a smartphone camera	404	93	124	108	79
	20%	19%	25% ad	22% d	16%
AI beauty tools (e.g. tools that can analyse, recommend or enhance beauty routines and product choices)	356	96	88	97	74
	18%	19%	18%	19%	15%
Augmented Reality Filters (e.g. on platforms such as Instagram or Snapchat) to change hairstyle, cosmetics, or facial features	342	96	79	97	70
	17%	19%	16%	19% d	14%
Avatar of yourself (digital representation or graphic image of yourself online)	301	92	80	81	48
	15%	18% d	16% d	16% d	10%
Injectable Aesthetic Treatments (e.g. Hyaluronic acid dermal fillers, Biostimulators, Skin Boosters, Botox (or another Botulinum Toxin))	74	17	22	26	9
	4%	3%	4% d	5% d	2%
I do not use any of these nowadays	600	160	121	128	190
	30%	32% bc	24%	26%	38% bc
Don't know	70	14	13	22	21
	3%	3%	3%	4%	4%

Proportions/Means: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 41

Q15 - Thinking about yourself 10-20 years from now, which, if any, of the following describe how you would like to feel about your appearance?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Confident in my own skin	909 45%	271 54% bc	212 42% c	178 36%	248 50% bc
Have a well-maintained appearance	892 45%	223 45%	226 45%	209 42%	233 47%
Natural and largely unchanged	766 38%	181 36%	193 39%	223 45% ad	168 34%
Have a youthful appearance	574 29%	145 29%	120 24%	161 32% b	148 30%
Free to evolve my look over time	513 26%	128 26% d	154 31% d	134 27% d	97 19%
I don't really think about this	157 8%	45 9% b	25 5%	44 9% b	42 8% b
None of these	31 2%	8 2%	9 2%	6 1%	8 2%
Don't know	75 4%	18 4%	19 4%	17 3%	21 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 42

Q16_Summary - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	Clear and honest information at each step of the treatment journey (e.g. product or treatment ingredients, potential risks, expected outcome, aftercare advice etc.)	Clear standards to identify qualified practitioners	Access to evidence-based information from healthcare professionals	Enough time dedicated to consultation	Follow-up care after treatment	Optional virtual consultations before in-person visits	Optional virtual consultations after in-person visits	Clinics that are conveniently located	Seeing real pictures of past patients before-and-after treatment	Access to real past patient's experiences or testimonials	Treatments in clinics that offer convenience, such as walk-in clinics and quick & easy appointments	Having a collaborative consultation where my preferences are considered alongside medical expertise
UNWEIGHTED BASE	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000
Essential	687	531	498	462	596	208	166	223	483	413	271	441
Very important	545	592	620	656	639	492	537	490	618	643	533	622
	27%	30%	31%	33%	32%	25%	27%	24%	31%	32%	27%	31%
Fairly important	412	488	484	523	397	632	667	682	526	546	590	536
	21%	24%	24%	26%	20%	32%	33%	34%	26%	27%	30%	27%
Not very important	184	196	207	158	147	392	373	347	188	197	349	193
	9%	10%	10%	8%	7%	20%	19%	17%	9%	10%	17%	10%
Not at all important	88	69	66	68	82	112	106	104	66	83	121	84
	4%	3%	3%	3%	4%	6%	5%	5%	3%	4%	6%	4%
NET: Essential / Very important	1232	1123	1118	1118	1235	700	702	712	1101	1056	804	1063
	62%	56%	56%	56%	62%	35%	35%	36%	55%	53%	40%	53%
NET: Not at all important / Not very important	272	266	273	227	230	504	479	450	254	280	470	277
	14%	13%	14%	11%	11%	25%	24%	23%	13%	14%	24%	14%
NET: Essential / Very important/ Fairly important	1644	1611	1602	1641	1632	1332	1369	1395	1627	1602	1394	1599
	82%	81%	80%	82%	82%	67%	68%	70%	81%	80%	70%	80%
Don't know	84	123	125	132	138	164	152	155	119	118	135	124
	4%	6%	6%	7%	7%	8%	8%	8%	6%	6%	7%	6%

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 43

Q16_1 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Clear and honest information at each step of the treatment journey (e.g. product or treatment ingredients, potential risks, expected outcome, after-care advice etc.)

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	687 34%	200 40% bd	127 25%	200 40% bd	160 32% b
Very important	545 27%	136 27%	148 30% c	118 24%	142 28%
Fairly important	412 21%	78 16%	118 24% a	98 20%	118 24% a
Not very important	184 9%	44 9%	60 12% d	47 9%	34 7%
Not at all important	88 4%	14 3%	28 6% a	24 5%	22 4%
NET: Essential / Very important	1232 62%	336 67% bd	275 55%	318 64% b	302 60%
NET: Not at all important / Not very important	272 14%	58 12%	88 18% ad	71 14%	55 11%
NET: Essential / Very important/ Fairly important	1644 82%	414 83%	393 79%	416 83%	421 84% b
Don't know	84 4%	28 6% c	19 4%	13 3%	24 5%

Proportions/Means: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 44

Q16_2 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Clear standards to identify qualified practitioners

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	531 27%	173 35% bcd	104 21%	120 24%	134 27% b
Very important	592 30%	146 29%	151 30%	146 29%	149 30%
Fairly important	488 24%	99 20%	124 25%	135 27% a	130 26% a
Not very important	196 10%	35 7%	69 14% ad	49 10%	42 8%
Not at all important	69 3%	9 2%	26 5% ad	22 4% a	13 3%
NET: Essential / Very important	1123 56%	319 64% bcd	254 51%	267 53%	283 57%
NET: Not at all important / Not very important	266 13%	44 9%	95 19% acd	71 14% a	55 11%
NET: Essential / Very important/ Fairly important	1611 81%	418 84% b	378 76%	402 80%	413 83% b
Don't know	123 6%	38 8%	27 5%	27 5%	32 6%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 45

Q16_3 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Access to evidence-based information from healthcare professionals

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	498 25%	158 32% bcd	96 19%	118 24%	125 25% b
Very important	620 31%	157 31%	150 30%	157 31%	157 31%
Fairly important	484 24%	105 21%	123 25%	128 26%	127 25%
Not very important	207 10%	44 9%	61 12%	57 11%	44 9%
Not at all important	66 3%	3 1%	33 7% acd	13 3% a	17 3% a
NET: Essential / Very important	1118 56%	315 63% bc	246 49%	275 55%	282 56% b
NET: Not at all important / Not very important	273 14%	47 9%	95 19% acd	70 14% a	61 12%
NET: Essential / Very important / Fairly important	1602 80%	421 84% b	369 74%	403 81% b	409 82% b
Don't know	125 6%	33 7%	36 7%	26 5%	30 6%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 46

Q16_4 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Enough time dedicated to consultation

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	462	127	127	108	101
	23%	25%	25%	22%	20%
Very important	656	173	154	154	175
	33%	35%	31%	31%	35%
Fairly important	523	129	108	141	146
	26%	26%	22%	28%	29%
				b	b
Not very important	158	30	46	51	32
	8%	6%	9%	10%	6%
				ad	
Not at all important	68	5	24	22	18
	3%	1%	5%	4%	4%
			a	a	a
NET: Essential / Very important	1118	300	281	262	275
	56%	60%	56%	52%	55%
		c			
NET: Not at all important / Not very important	227	35	70	73	49
	11%	7%	14%	15%	10%
			a	ad	
NET: Essential / Very important / Fairly important	1641	428	390	403	421
	82%	86%	78%	81%	84%
		bc			b
Don't know	132	37	41	24	30
	7%	7%	8%	5%	6%
			c		

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 47

Q16_5 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Follow-up care after treatment

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	596 30%	165 33% b	122 24%	156 31% b	153 31% b
Very important	639 32%	172 34%	158 32%	151 30%	157 31%
Fairly important	397 20%	89 18%	100 20%	103 21%	105 21%
Not very important	147 7%	19 4%	54 11% ad	45 9% a	29 6%
Not at all important	82 4%	18 4%	23 5%	18 4%	23 5%
NET: Essential / Very important	1235 62%	338 68% b	280 56%	307 61%	310 62%
NET: Not at all important / Not very important	230 11%	37 7%	77 15% ad	63 13% a	52 10%
NET: Essential / Very important/ Fairly important	1632 82%	427 85% b	380 76%	411 82% b	415 83% b
Don't know	138 7%	37 7%	43 9% c	26 5%	33 7%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 48

Q16_6 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Optional virtual consultations before in-person visits

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	208 10%	51 10%	59 12%	52 10%	46 9%
Very important	492 25%	131 26%	131 26%	114 23%	115 23%
Fairly important	632 32%	174 35%	139 28%	149 30%	170 34%
Not very important	392 20%	75 15%	96 19%	123 25%	98 20%
Not at all important	112 6%	18 4%	38 8%	28 6%	28 6%
NET: Essential / Very important	700 35%	183 37%	191 38%	166 33%	161 32%
NET: Not at all important / Not very important	504 25%	93 19%	134 27%	151 30%	125 25%
NET: Essential / Very important / Fairly important	1332 67%	357 71%	330 66%	315 63%	331 66%
Don't know	164 8%	50 10%	36 7%	34 7%	44 9%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 49

Q16_7 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Optional virtual consultations after in-person visits

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	166 8%	51 10%	35 7%	42 8%	38 8%
Very important	537 27%	144 29% d	161 32% cd	121 24%	111 22%
Fairly important	667 33%	176 35%	147 29%	164 33%	181 36% b
Not very important	373 19%	67 13%	89 18%	115 23% ab	102 20% a
Not at all important	106 5%	20 4%	29 6%	24 5%	33 7%
NET: Essential / Very important	702 35%	195 39% cd	196 39% cd	163 33%	149 30%
NET: Not at all important / Not very important	479 24%	88 18%	118 24% a	138 28% a	135 27% a
NET: Essential / Very important/ Fairly important	1369 68%	370 74% cd	342 68%	327 65%	330 66%
Don't know	152 8%	42 8%	40 8%	35 7%	35 7%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 50

Q16_8 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Clinics that are conveniently located

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	223 11%	73 15% bd	44 9%	61 12%	45 9%
Very important	490 24%	128 26%	121 24%	111 22%	130 26%
Fairly important	682 34%	163 33%	160 32%	187 37%	172 34%
Not very important	347 17%	88 18%	97 19%	78 16%	83 17%
Not at all important	104 5%	12 2%	38 8% a	28 6% a	25 5% a
NET: Essential / Very important	712 36%	201 40% b	165 33%	172 34%	175 35%
NET: Not at all important / Not very important	450 23%	100 20%	136 27% ac	107 21%	108 22%
NET: Essential / Very important / Fairly important	1395 70%	364 73% b	326 65%	359 72% b	347 69%
Don't know	155 8%	36 7%	39 8%	34 7%	45 9%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 51

Q16_9 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Seeing real pictures of past patients before-and-after treatment

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	483 24%	159 32% bcd	85 17%	124 25% b	115 23% b
Very important	618 31%	143 29%	164 33%	156 31%	155 31%
Fairly important	526 26%	121 24%	137 27%	121 24%	146 29%
Not very important	188 9%	31 6%	53 11% a	64 13% ad	40 8%
Not at all important	66 3%	14 3%	21 4%	15 3%	17 3%
NET: Essential / Very important	1101 55%	302 60% b	249 50%	280 56%	270 54%
NET: Not at all important / Not very important	254 13%	44 9%	75 15% a	79 16% ad	57 11%
NET: Essential / Very important/ Fairly important	1627 81%	423 85% b	386 77%	401 80%	416 83% b
Don't know	119 6%	33 7%	39 8% c	20 4%	27 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 52

Q16_10 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Access to real past patient's experiences or testimonials

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	413 21%	114 23% d	101 20%	112 22% d	86 17%
Very important	643 32%	148 30%	149 30%	163 33%	183 37% ab
Fairly important	546 27%	133 27%	140 28%	129 26%	145 29%
Not very important	197 10%	40 8%	58 12%	55 11%	44 9%
Not at all important	83 4%	24 5%	26 5%	18 4%	16 3%
NET: Essential / Very important	1056 53%	263 53%	250 50%	275 55%	268 54%
NET: Not at all important / Not very important	280 14%	64 13%	83 17% d	73 15%	60 12%
NET: Essential / Very important/ Fairly important	1602 80%	395 79%	390 78%	404 81%	413 83%
Don't know	118 6%	41 8% c	27 5%	24 5%	26 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 53

Q16_11 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Treatments in clinics that offer convenience, such as walk-in clinics and quick & easy appointments

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	271 14%	73 15%	67 13%	78 16% d	54 11%
Very important	533 27%	128 26%	165 33% acd	120 24%	120 24%
Fairly important	590 30%	138 28%	135 27%	145 29%	173 35% ab
Not very important	349 17%	94 19%	74 15%	96 19%	86 17%
Not at all important	121 6%	25 5%	35 7%	31 6%	30 6%
NET: Essential / Very important	804 40%	201 40%	232 46% cd	197 39%	174 35%
NET: Not at all important / Not very important	470 24%	119 24%	110 22%	127 25%	115 23%
NET: Essential / Very important/ Fairly important	1394 70%	339 68%	367 73%	342 68%	346 69%
Don't know	135 7%	42 8% b	24 5%	31 6%	38 8%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 54

Q16_12 - Thinking about those who have aesthetic treatments. How important or not do you think each of the following are for such treatments? - Having a collaborative consultation where my preferences are considered alongside medical expertise

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Essential	441 22%	117 23%	115 23%	92 18%	118 24% c
Very important	622 31%	148 30%	151 30%	161 32%	162 32%
Fairly important	536 27%	141 28%	127 25%	147 29%	121 24%
Not very important	193 10%	35 7%	54 11%	60 12% a	44 9%
Not at all important	84 4%	20 4%	26 5%	20 4%	18 4%
NET: Essential / Very important	1063 53%	264 53%	266 53%	253 51%	280 56%
NET: Not at all important / Not very important	277 14%	55 11%	80 16% a	80 16% a	62 12%
NET: Essential / Very important/ Fairly important	1599 80%	405 81%	393 79%	400 80%	401 80%
Don't know	124 6%	39 8% c	28 6%	20 4%	37 7% c

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 55

Q17_Summary - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	Treatments tailored to my individual face	Treatments that improve my long-term skin health	Treatments or procedures that have permanent effects	A long-term treatment plan that evolves with my age	Treatments that deliver quick, visible results with minimal effort	Treatments that work gradually over time, with results that build up through regular or repeated sessions	Treatments designed as a one-time or occasional transformation, rather than ongoing care	Tools that help visualise possible outcomes before treatment	Treatments that are reversible or adaptable if my preferences change	Treatments that are easy to fit into my lifestyle with short appointment times	Treatments in clinics carried out only by verified healthcare professionals
UNWEIGHTED BASE	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000
Certain to	202	198	122	146	147	152	123	154	157	163	278
Very likely	379	444	332	345	384	349	337	407	358	399	383
	19%	22%	17%	17%	19%	17%	17%	20%	18%	20%	19%
Fairly likely	543	578	465	519	532	531	505	546	567	551	490
	27%	29%	23%	26%	27%	27%	25%	27%	28%	28%	24%
Fairly unlikely	334	316	394	396	392	398	425	368	356	350	339
	17%	16%	20%	20%	20%	20%	21%	18%	18%	18%	17%
Very unlikely	199	165	265	225	202	232	234	184	216	187	195
	10%	8%	13%	11%	10%	12%	12%	9%	11%	9%	10%
Certain not to	189	150	250	202	186	193	211	186	183	196	171
	9%	8%	13%	10%	9%	10%	11%	9%	9%	10%	9%
NET: Certain to / Very likely	581	641	454	491	532	501	460	561	515	562	661
	29%	32%	23%	25%	27%	25%	23%	28%	26%	28%	33%
NET: Very unlikely / Certain not to	388	315	516	428	388	425	445	370	399	384	366
	19%	16%	26%	21%	19%	21%	22%	19%	20%	19%	18%
NET: Certain to / Very likely / Fairly likely	1124	1220	919	1010	1064	1032	965	1106	1081	1113	1150
	56%	61%	46%	51%	53%	52%	48%	55%	54%	56%	58%
NET: Fairly unlikely / Very unlikely / Certain not to	722	631	910	823	780	823	870	738	756	734	706
	36%	32%	45%	41%	39%	41%	44%	37%	38%	37%	35%
Don't know	154	149	171	167	156	145	165	156	163	153	144
	8%	7%	9%	8%	8%	7%	8%	8%	8%	8%	7%

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 56

Q17_1 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments tailored to my individual face

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	202	56	47	46	53
	10%	11%	9%	9%	11%
Very likely	379	107	97	92	83
	19%	21%	19%	18%	17%
Fairly likely	543	127	139	140	137
	27%	25%	28%	28%	27%
Fairly unlikely	334	79	91	80	83
	17%	16%	18%	16%	17%
Very unlikely	199	51	52	44	52
	10%	10%	10%	9%	10%
Certain not to	189	33	47	59	50
	9%	7%	9%	12% a	10%
NET: Certain to / Very likely	581	163	144	138	136
	29%	33%	29%	28%	27%
NET: Very unlikely / Certain not to	388	84	99	103	102
	19%	17%	20%	21%	20%
NET: Certain to / Very likely / Fairly likely	1124	290	284	278	273
	56%	58%	57%	56%	55%
NET: Fairly unlikely / Very unlikely / Certain not to	722	163	190	183	186
	36%	33%	38%	37%	37%
Don't know	154	47	26	39	42
	8%	9%	5%	8%	8%
		b			

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 57

Q17_2 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that improve my long-term skin health

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	198 10%	46 9%	56 11%	46 9%	50 10%
Very likely	444 22%	123 25%	101 20%	121 24%	98 20%
Fairly likely	578 29%	152 30%	143 29%	134 27%	149 30%
Fairly unlikely	316 16%	60 12%	96 19% a	81 16%	79 16%
Very unlikely	165 8%	42 8%	50 10%	37 7%	35 7%
Certain not to	150 8%	23 5%	30 6%	44 9% a	53 11% ab
NET: Certain to / Very likely	641 32%	170 34%	158 32%	167 33%	147 29%
NET: Very unlikely / Certain not to	315 16%	66 13%	80 16% a	81 16% a	88 18% a
NET: Certain to / Very likely / Fairly likely	1220 61%	322 64%	300 60% a	301 60% a	296 59% a
NET: Fairly unlikely / Very unlikely / Certain not to	631 32%	125 25% b	176 35% a	162 32% a	167 33% a
Don't know	149 7%	53 11% b	23 5%	37 7%	36 7%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 58

Q17_3 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments or procedures that have permanent effects

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	122 6%	25 5%	41 8%	29 6%	28 6%
Very likely	332 17%	87 17%	114 23% acd	69 14%	63 13%
Fairly likely	465 23%	119 24%	111 22%	129 26%	107 21%
Fairly unlikely	394 20%	100 20%	88 18%	96 19%	111 22%
Very unlikely	265 13%	58 12%	66 13%	69 14%	71 14%
Certain not to	250 13%	61 12%	48 10%	65 13%	76 15% b
NET: Certain to / Very likely	454 23%	111 22%	154 31% acd	98 20%	91 18%
NET: Very unlikely / Certain not to	516 26%	119 24%	115 23%	134 27%	147 29% b
NET: Certain to / Very likely / Fairly likely	919 46%	230 46%	265 53% acd	227 45%	198 40%
NET: Fairly unlikely / Very unlikely / Certain not to	910 45%	219 44%	203 41%	230 46%	258 52% ab
Don't know	171 9%	51 10% b	32 6%	44 9%	44 9%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 59

Q17_4 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - A long-term treatment plan that evolves with my age

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	146 7%	35 7%	42 8%	43 9%	26 5%
Very likely	345 17%	90 18%	83 17%	96 19%	76 15%
Fairly likely	519 26%	130 26%	148 30%	117 23%	123 25%
Fairly unlikely	396 20%	105 21%	98 20%	86 17%	107 21%
Very unlikely	225 11%	48 10%	68 14%	52 10%	57 11%
Certain not to	202 10%	38 8%	39 8%	63 13%	62 12%
NET: Certain to / Very likely	491 25%	125 25%	125 25%	139 28%	102 20%
NET: Very unlikely / Certain not to	428 21%	86 17%	107 21%	115 23%	119 24%
NET: Certain to / Very likely / Fairly likely	1010 51%	256 51%	273 55%	256 51%	225 45%
NET: Fairly unlikely / Very unlikely / Certain not to	823 41%	190 38%	206 41%	201 40%	226 45%
Don't know	167 8%	54 11%	21 4%	43 9%	49 10%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 60

Q17_5 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that deliver quick, visible results with minimal effort

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	147 7%	39 8%	45 9%	32 6%	32 6%
Very likely	384 19%	118 24% cd	93 19%	85 17%	89 18%
Fairly likely	532 27%	140 28%	129 26%	140 28%	124 25%
Fairly unlikely	392 20%	79 16%	110 22% a	100 20%	104 21%
Very unlikely	202 10%	43 9%	55 11%	57 11%	47 9%
Certain not to	186 9%	29 6%	40 8%	57 11% a	59 12% ab
NET: Certain to / Very likely	532 27%	156 31% cd	138 28%	117 23%	121 24%
NET: Very unlikely / Certain not to	388 19%	73 15%	95 19%	114 23% a	106 21% a
NET: Certain to / Very likely / Fairly likely	1064 53%	297 59% cd	266 53%	256 51%	245 49%
NET: Fairly unlikely / Very unlikely / Certain not to	780 39%	152 30%	204 41% a	214 43% a	209 42% a
Don't know	156 8%	51 10% bc	29 6%	30 6%	46 9%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 61

Q17_6 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that work gradually over time, with results that build up through regular or repeated sessions

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	152 8%	46 9%	33 7%	34 7%	38 8%
Very likely	349 17%	93 19%	80 16%	95 19%	82 16%
Fairly likely	531 27%	132 26%	150 30%	137 27%	112 22%
Fairly unlikely	398 20%	92 18%	95 19%	93 19%	118 24%
Very unlikely	232 12%	50 10%	69 14%	59 12%	53 11%
Certain not to	193 10%	33 7%	57 11%	49 10%	55 11%
NET: Certain to / Very likely	501 25%	139 28%	113 23%	129 26%	120 24%
NET: Very unlikely / Certain not to	425 21%	84 17%	126 25%	108 22%	108 22%
NET: Certain to / Very likely / Fairly likely	1032 52%	271 54%	263 53%	266 53%	232 46%
NET: Fairly unlikely / Very unlikely / Certain not to	823 41%	176 35%	221 44%	202 40%	225 45%
Don't know	145 7%	53 11%	16 3%	33 7%	43 9%
		bc		b	b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 62

Q17_7 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments designed as a one-time or occasional transformation, rather than ongoing care

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	123 6%	26 5%	44 9%	24 5%	30 6%
Very likely	337 17%	97 19%	84 17%	79 16%	76 15%
Fairly likely	505 25%	148 30%	136 27%	121 24%	99 20%
Fairly unlikely	425 21%	104 21%	96 19%	108 22%	117 23%
Very unlikely	234 12%	36 7%	68 14%	60 12%	71 14%
Certain not to	211 11%	36 7%	51 10%	66 13%	57 11%
NET: Certain to / Very likely	460 23%	123 25%	128 26%	103 21%	106 21%
NET: Very unlikely / Certain not to	445 22%	72 14%	120 24%	126 25%	128 26%
NET: Certain to / Very likely / Fairly likely	965 48%	271 54%	264 53%	225 45%	205 41%
NET: Fairly unlikely / Very unlikely / Certain not to	870 44%	176 35%	215 43%	234 47%	245 49%
Don't know	165 8%	53 11%	21 4%	41 8%	50 10%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 63

Q17_8 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Tools that help visualise possible outcomes before treatment

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	154	35	37	37	45
	8%	7%	7%	7%	9%
Very likely	407	110	99	109	89
	20%	22%	20%	22%	18%
Fairly likely	546	140	134	128	144
	27%	28%	27%	26%	29%
Fairly unlikely	368	91	106	97	74
	18%	18%	21%	19%	15%
			d		
Very unlikely	184	34	59	44	47
	9%	7%	12%	9%	9%
			a		
Certain not to	186	36	44	46	60
	9%	7%	9%	9%	12%
					a
NET: Certain to / Very likely	561	145	136	147	134
	28%	29%	27%	29%	27%
NET: Very unlikely / Certain not to	370	70	103	90	107
	19%	14%	21%	18%	21%
			a		a
NET: Certain to / Very likely / Fairly likely	1106	284	269	275	278
	55%	57%	54%	55%	56%
NET: Fairly unlikely / Very unlikely / Certain not to	738	161	209	187	181
	37%	32%	42%	37%	36%
			a		
Don't know	156	55	22	38	41
	8%	11%	4%	8%	8%
		b		b	b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 64

Q17_9 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that are reversible or adaptable if my preferences change

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	157 8%	48 10%	38 8%	38 8%	33 7%
Very likely	358 18%	92 18%	89 18%	91 18%	85 17%
Fairly likely	567 28%	155 31%	140 28%	142 28%	129 26%
Fairly unlikely	356 18%	84 17%	100 20%	88 18%	84 17%
Very unlikely	216 11%	42 8%	58 12%	55 11%	61 12%
Certain not to	183 9%	33 7%	48 10%	50 10%	53 11%
NET: Certain to / Very likely	515 26%	140 28%	127 25%	129 26%	119 24%
NET: Very unlikely / Certain not to	399 20%	74 15%	106 21%	105 21%	114 23%
NET: Certain to / Very likely / Fairly likely	1081 54%	296 59%	268 54%	271 54%	247 49%
NET: Fairly unlikely / Very unlikely / Certain not to	756 38%	158 32%	206 41%	193 39%	198 40%
Don't know	163 8%	46 9%	27 5%	36 7%	55 11%
		b			bc

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 65

Q17_10 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments that are easy to fit into my lifestyle with short appointment times

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	163 8%	46 9%	52 10% d	35 7%	30 6%
Very likely	399 20%	111 22%	93 19%	92 18%	104 21%
Fairly likely	551 28%	137 27%	144 29%	141 28%	129 26%
Fairly unlikely	350 18%	81 16%	87 17%	94 19%	88 18%
Very unlikely	187 9%	38 8%	55 11%	50 10%	45 9%
Certain not to	196 10%	31 6%	49 10%	56 11% a	60 12% a
NET: Certain to / Very likely	562 28%	156 31%	145 29%	128 26%	134 27%
NET: Very unlikely / Certain not to	384 19%	69 14%	105 21% a	105 21% a	105 21% a
NET: Certain to / Very likely / Fairly likely	1113 56%	293 59%	289 58%	268 54%	262 52%
NET: Fairly unlikely / Very unlikely / Certain not to	734 37%	150 30%	192 38% a	199 40% a	193 39% a
Don't know	153 8%	57 11% bc	19 4%	32 6%	45 9% b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 66

Q17_11 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics carried out only by verified healthcare professionals

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	278	75	61	63	78
	14%	15%	12%	13%	16%
Very likely	383	116	85	104	77
	19%	23%	17%	21%	15%
		bd		d	
Fairly likely	490	119	137	118	116
	24%	24%	27%	24%	23%
Fairly unlikely	339	72	102	81	84
	17%	14%	20%	16%	17%
			a		
Very unlikely	195	43	57	50	46
	10%	9%	11%	10%	9%
Certain not to	171	31	38	49	53
	9%	6%	8%	10%	11%
					a
NET: Certain to / Very likely	661	192	146	167	155
	33%	38%	29%	33%	31%
		bd			
NET: Very unlikely / Certain not to	366	74	95	98	99
	18%	15%	19%	20%	20%
NET: Certain to / Very likely / Fairly likely	1150	311	283	285	271
	58%	62%	57%	57%	54%
		d			
NET: Fairly unlikely / Very unlikely / Certain not to	706	146	198	179	183
	35%	29%	40%	36%	37%
			a	a	a
Don't know	144	44	20	36	45
	7%	9%	4%	7%	9%
		b		b	b

Proportions/Means: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 67

Q17A_Summary - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	Treatments in clinics that offer a combination approach of medical expertise with wellness and skin health	Treatments in clinics that look and feel more like wellness or self-care spaces than clinically led medical facilities	Treatments in clinics that look and feel more like clinically led medical facilities than wellness or self-care spaces
UNWEIGHTED BASE	2072	2072	2072
WEIGHTED BASE	2000	2000	2000
Certain to	215	138	178
Very likely	415	366	372
	21%	18%	19%
Fairly likely	547	544	530
	27%	27%	27%
Fairly unlikely	308	380	371
	15%	19%	19%
Very unlikely	184	213	190
	9%	11%	9%
Certain not to	177	191	184
	9%	10%	9%
NET: Certain to / Very likely	630	504	550
	31%	25%	27%
NET: Very unlikely / Certain not to	361	403	373
	18%	20%	19%
NET: Certain to / Very likely / Fairly likely	1177	1048	1080
	59%	52%	54%
NET: Fairly unlikely / Very unlikely / Certain not to	669	784	745
	33%	39%	37%
Don't know	154	168	175
	8%	8%	9%



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 68

Q17A_1 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics that offer a combination approach of medical expertise with wellness and skin health

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	215	46	62	54	52
	11%	9%	12%	11%	10%
Very likely	415	125	101	99	90
	21%	25%	20%	20%	18%
		d			
Fairly likely	547	146	132	130	139
	27%	29%	26%	26%	28%
Fairly unlikely	308	71	87	79	71
	15%	14%	17%	16%	14%
Very unlikely	184	34	56	39	56
	9%	7%	11%	8%	11%
			a		a
Certain not to	177	32	36	51	58
	9%	6%	7%	10%	12%
				a	ab
NET: Certain to / Very likely	630	171	163	153	142
	31%	34%	33%	31%	28%
NET: Very unlikely / Certain not to	361	65	91	90	114
	18%	13%	18%	18%	23%
			a	a	a
NET: Certain to / Very likely / Fairly likely	1177	317	295	284	281
	59%	63%	59%	57%	56%
		cd			
NET: Fairly unlikely / Very unlikely / Certain not to	669	136	179	169	185
	33%	27%	36%	34%	37%
			a	a	a
Don't know	154	47	26	47	34
	8%	9%	5%	9%	7%
		b		b	

Proportions/Means: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 69

Q17A_2 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics that look and feel more like wellness or self-care spaces than clinically led medical facilities

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	138 7%	35 7%	43 9% d	35 7%	25 5%
Very likely	366 18%	101 20%	88 18%	94 19%	83 17%
Fairly likely	544 27%	145 29%	122 24%	146 29%	131 26%
Fairly unlikely	380 19%	83 17%	112 22% a	87 17%	99 20%
Very unlikely	213 11%	44 9%	67 13% ac	45 9%	57 11%
Certain not to	191 10%	36 7%	48 10%	47 9%	59 12% a
NET: Certain to / Very likely	504 25%	136 27%	132 26%	129 26%	108 22%
NET: Very unlikely / Certain not to	403 20%	80 16%	115 23% a	92 18%	116 23% a
NET: Certain to / Very likely / Fairly likely	1048 52%	281 56% d	254 51%	275 55% d	238 48%
NET: Fairly unlikely / Very unlikely / Certain not to	784 39%	163 33%	227 45% ac	179 36%	215 43% ac
Don't know	168 8%	55 11% b	19 4%	46 9% b	47 9% b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 70

Q17A_3 - To what extent are you likely or unlikely to have or use each of the following aesthetic treatments in the future? - Treatments in clinics that look and feel more like clinically led medical facilities than wellness or self-care spaces

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Certain to	178	39	47	43	48
	9%	8%	9%	9%	10%
Very likely	372	98	86	94	94
	19%	20%	17%	19%	19%
Fairly likely	530	147	127	127	130
	27%	29%	25%	25%	26%
Fairly unlikely	371	84	112	92	84
	19%	17%	22%	18%	17%
Very unlikely	190	42	60	42	46
	9%	8%	12%	8%	9%
Certain not to	184	38	45	48	53
	9%	8%	9%	10%	11%
NET: Certain to / Very likely	550	138	133	137	142
	27%	28%	27%	27%	28%
NET: Very unlikely / Certain not to	373	80	104	90	99
	19%	16%	21%	18%	20%
NET: Certain to / Very likely / Fairly likely	1080	284	260	264	272
	54%	57%	52%	53%	54%
NET: Fairly unlikely / Very unlikely / Certain not to	745	164	216	182	183
	37%	33%	43%	36%	37%
Don't know	175	52	24	54	45
	9%	10%	5%	11%	9%
		b		b	b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 71
Q20_Summary - To what extent do you agree or disagree with each of the following statements?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	I like to stand out	It's important to me that I adopt beauty products or treatments that help me stay on trend	I am more likely to search for products or treatments promoted by influencers than those recommended by family/friends	When choosing beauty products or treatments I like to use the same ones as my friends	I am usually the first in my friendship group to try new beauty products and treatments	I feel true to myself in my approach to beauty	I struggle between wanting to look natural and the pressure to look perfect	A flawless appearance is more important to me than showing my natural self	Beauty products and treatments empower me and boost my confidence	I feel comfortable experimenting with different beauty styles	I feel under pressure to look a certain way	Nowadays it's acceptable to be unique as a form of self-expression	I like to buy beauty products or treatments from brands that are specifically for a diverse set of people	I am more likely to buy beauty products or treatments from brands that celebrate cultural diversity	I like the fact that men can now wear make up	I am happy with my current approach to skincare	I prefer to adopt a simple approach to skincare
UNWEIGHTED BASE	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000
Strongly agree	290	216	233	206	213	362	262	224	300	246	246	405	258	249	439	324	420
Tend to agree	478	533	407	561	476	705	580	458	673	622	607	704	555	576	507	693	732
	24%	27%	20%	28%	24%	35%	29%	23%	34%	31%	30%	35%	28%	29%	25%	35%	37%
Neither agree nor disagree	516	518	496	592	519	495	527	506	544	560	466	500	632	628	545	511	425
	26%	26%	25%	30%	26%	25%	26%	25%	27%	28%	23%	25%	32%	31%	27%	26%	21%
Tend to disagree	363	375	414	358	382	217	326	447	235	312	351	206	280	281	241	282	227
	18%	19%	21%	18%	19%	11%	16%	22%	12%	16%	18%	10%	14%	14%	12%	14%	11%
Strongly disagree	225	283	367	183	315	93	217	278	156	142	224	88	169	144	164	97	79
	11%	14%	18%	9%	16%	5%	11%	14%	8%	7%	11%	4%	8%	7%	8%	5%	4%
NET: Strongly / tend to agree	768	748	640	767	689	1067	842	682	973	869	853	1109	813	826	946	1017	1152
	38%	37%	32%	38%	34%	53%	42%	34%	49%	43%	43%	55%	41%	41%	47%	51%	58%
NET: Strongly / tend to disagree	588	658	781	540	697	310	543	725	391	455	575	294	449	425	405	378	306
	29%	33%	39%	27%	35%	15%	27%	36%	20%	23%	29%	15%	22%	21%	20%	19%	15%
Don't know	128	75	83	101	96	128	89	88	91	116	106	96	106	121	103	94	117
	6%	4%	4%	5%	5%	6%	4%	4%	5%	6%	5%	5%	5%	6%	5%	5%	6%

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 72

Q20_1 - To what extent do you agree or disagree with each of the following statements? - I like to stand out

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	290 14%	72 14%	65 13%	76 15%	78 16%
Tend to agree	478 24%	104 21%	116 23%	107 21%	151 30% abc
Neither agree nor disagree	516 26%	136 27%	121 24%	112 22%	148 30% c
Tend to disagree	363 18%	104 21% d	97 19% d	98 20% d	64 13%
Strongly disagree	225 11%	64 13% d	60 12% d	70 14% d	31 6%
NET: Strongly / tend to agree	768 38%	176 35%	181 36%	182 36%	228 46% abc
NET: Strongly / tend to disagree	588 29%	168 34% d	157 31% d	169 34% d	95 19%
Don't know	128 6%	20 4%	41 8% a	37 7% a	29 6%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 73

Q20_2 - To what extent do you agree or disagree with each of the following statements? - It's important to me that I adopt beauty products or treatments that help me stay on trend

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	216 11%	45 9%	52 10%	65 13%	53 11%
Tend to agree	533 27%	152 30%	125 25%	129 26%	127 25%
Neither agree nor disagree	518 26%	124 25%	127 25%	133 27%	135 27%
Tend to disagree	375 19%	104 21%	98 20%	87 17%	85 17%
Strongly disagree	283 14%	56 11%	80 16%	65 13%	82 16%
NET: Strongly / tend to agree	748 37%	196 39%	178 36%	195 39%	180 36%
NET: Strongly / tend to disagree	658 33%	160 32%	178 36%	152 30%	167 33%
Don't know	75 4%	20 4%	17 3%	20 4%	18 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 74

Q20_3 - To what extent do you agree or disagree with each of the following statements? - I am more likely to search for products or treatments promoted by influencers than those recommended by family/friends

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	233 12%	58 12% d	73 15% d	66 13% d	36 7%
Tend to agree	407 20%	126 25% bd	90 18%	101 20%	91 18%
Neither agree nor disagree	496 25%	117 23%	134 27%	117 23%	128 26%
Tend to disagree	414 21%	105 21%	97 19%	92 18%	120 24% c
Strongly disagree	367 18%	69 14%	94 19% a	107 21% a	98 20% a
NET: Strongly / tend to agree	640 32%	183 37% d	163 33% d	166 33% d	127 25%
NET: Strongly / tend to disagree	781 39%	174 35%	191 38%	199 40%	218 44% a
Don't know	83 4%	26 5% b	13 3%	18 4%	26 5% b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 75

Q20_4 - To what extent do you agree or disagree with each of the following statements? - When choosing beauty products or treatments I like to use the same ones as my friends

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	206 10%	45 9%	75 15% acd	53 11% d	33 7%
Tend to agree	561 28%	141 28%	152 30% d	153 31% d	114 23%
Neither agree nor disagree	592 30%	144 29%	136 27%	142 28%	170 34% b
Tend to disagree	358 18%	97 19%	76 15%	85 17%	99 20%
Strongly disagree	183 9%	46 9%	44 9%	39 8%	53 11%
NET: Strongly / tend to agree	767 38%	186 37% d	227 45% ad	207 41% d	147 29%
NET: Strongly / tend to disagree	540 27%	144 29%	121 24%	124 25%	152 30% b
Don't know	101 5%	27 5%	16 3%	27 5%	31 6% b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 76

Q20_5 - To what extent do you agree or disagree with each of the following statements? - I am usually the first in my friendship group to try new beauty products and treatments

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	213 11%	44 9%	55 11%	63 13%	51 10%
Tend to agree	476 24%	136 27%	111 22%	119 24%	109 22%
Neither agree nor disagree	519 26%	129 26%	142 28%	107 21%	141 28%
Tend to disagree	382 19%	90 18%	97 19%	95 19%	99 20%
Strongly disagree	315 16%	76 15%	78 16%	95 19%	66 13%
NET: Strongly / tend to agree	689 34%	180 36%	166 33%	182 36%	161 32%
NET: Strongly / tend to disagree	697 35%	166 33%	175 35%	190 38%	165 33%
Don't know	96 5%	25 5%	17 3%	21 4%	33 7%
					b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.


25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS
5 Mar 2026
Table 77
Q20_6 - To what extent do you agree or disagree with each of the following statements? - I feel true to myself in my approach to beauty
Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	362 18%	80 16%	98 20%	93 19%	91 18%
Tend to agree	705 35%	194 39%	160 32%	163 33%	188 38%
Neither agree nor disagree	495 25%	132 26%	118 24%	125 25%	120 24%
Tend to disagree	217 11%	44 9%	67 13%	57 11%	48 10%
Strongly disagree	93 5%	16 3%	23 5%	33 7%	21 4%
NET: Strongly / tend to agree	1067 53%	273 55%	258 52%	256 51%	279 56%
NET: Strongly / tend to disagree	310 15%	60 12%	90 18%	90 18%	70 14%
Don't know	128 6%	34 7%	33 7%	29 6%	31 6%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d
Overlap formulae used.
This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 78

Q20_7 - To what extent do you agree or disagree with each of the following statements? - I struggle between wanting to look natural and the pressure to look perfect

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	262 13%	65 13%	69 14%	69 14%	59 12%
Tend to agree	580 29%	156 31%	125 25%	161 32%	138 28%
Neither agree nor disagree	527 26%	132 26%	132 26%	120 24%	143 29%
Tend to disagree	326 16%	82 16%	86 17%	73 15%	86 17%
Strongly disagree	217 11%	44 9%	61 12%	55 11%	56 11%
NET: Strongly / tend to agree	842 42%	221 44%	194 39%	230 46%	197 39%
NET: Strongly / tend to disagree	543 27%	126 25%	147 29%	128 26%	142 28%
Don't know	89 4%	21 4%	28 6%	22 4%	18 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.


25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS
5 Mar 2026
Table 79
Q20_8 - To what extent do you agree or disagree with each of the following statements? - A flawless appearance is more important to me than showing my natural self
Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	224 11%	49 10%	69 14%	59 12%	47 9%
Tend to agree	458 23%	110 22%	106 21%	132 26%	109 22%
Neither agree nor disagree	506 25%	136 27%	109 22%	120 24%	141 28%
Tend to disagree	447 22%	127 25%	114 23%	94 19%	112 22%
Strongly disagree	278 14%	62 12%	78 16%	72 14%	66 13%
NET: Strongly / tend to agree	682 34%	160 32%	175 35%	192 38%	156 31%
NET: Strongly / tend to disagree	725 36%	188 38%	192 38%	166 33%	178 36%
Don't know	88 4%	17 3%	24 5%	22 4%	25 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d
Overlap formulae used.
This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT

9TH - 26TH FEBRUARY 2026

PUBLIC

IPSOS

5 Mar 2026

Table 80

Q20_9 - To what extent do you agree or disagree with each of the following statements? - Beauty products and treatments empower me and boost my confidence

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	300 15%	88 18% d	68 14%	86 17% d	59 12%
Tend to agree	673 34%	176 35%	164 33%	151 30%	182 36% c
Neither agree nor disagree	544 27%	140 28%	134 27%	133 27%	137 27%
Tend to disagree	235 12%	49 10%	60 12%	67 13%	60 12%
Strongly disagree	156 8%	24 5%	53 11% a	40 8% a	38 8%
NET: Strongly / tend to agree	973 49%	263 53%	232 46%	237 47%	241 48%
NET: Strongly / tend to disagree	391 20%	73 15%	113 23% a	107 21% a	98 20%
Don't know	91 5%	24 5%	20 4%	23 5%	24 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT

9TH - 26TH FEBRUARY 2026

PUBLIC

IPSOS

5 Mar 2026

Table 81

Q20_10 - To what extent do you agree or disagree with each of the following statements? - I feel comfortable experimenting with different beauty styles

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	246 12%	55 11%	62 12%	74 15%	56 11%
Tend to agree	622 31%	183 37% bc	148 30%	139 28%	152 30%
Neither agree nor disagree	560 28%	144 29%	132 26%	134 27%	150 30%
Tend to disagree	312 16%	69 14%	88 18%	80 16%	76 15%
Strongly disagree	142 7%	32 6%	44 9%	35 7%	32 6%
NET: Strongly / tend to agree	869 43%	237 47%	210 42%	213 43%	208 42%
NET: Strongly / tend to disagree	455 23%	101 20%	132 26% a	115 23%	107 21%
Don't know	116 6%	17 3%	26 5%	38 8% a	34 7% a

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.


25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS
5 Mar 2026
Table 82
Q20_11 - To what extent do you agree or disagree with each of the following statements? - I feel under pressure to look a certain way
Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	246 12%	56 11%	69 14%	62 12%	59 12%
Tend to agree	607 30%	184 37% bc	132 26%	136 27%	156 31%
Neither agree nor disagree	466 23%	114 23%	118 24%	120 24%	114 23%
Tend to disagree	351 18%	75 15%	98 20%	86 17%	92 18%
Strongly disagree	224 11%	50 10%	51 10%	73 15% abd	50 10%
NET: Strongly / tend to agree	853 43%	239 48% bc	201 40%	197 39%	216 43%
NET: Strongly / tend to disagree	575 29%	125 25%	149 30%	159 32% a	142 28%
Don't know	106 5%	21 4%	33 7%	24 5%	28 6%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d
Overlap formulae used.
This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 83

Q20_12 - To what extent do you agree or disagree with each of the following statements? - Nowadays it's acceptable to be unique as a form of self-expression

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	405 20%	114 23%	106 21%	89 18%	97 19%
Tend to agree	704 35%	216 43%	145 29%	148 30%	196 39%
Neither agree nor disagree	500 25%	108 22%	128 26%	152 30%	113 23%
Tend to disagree	206 10%	29 6%	64 13%	62 12%	51 10%
Strongly disagree	88 4%	14 3%	31 6%	23 5%	19 4%
NET: Strongly / tend to agree	1109 55%	329 66%	250 50%	237 47%	293 59%
NET: Strongly / tend to disagree	294 15%	44 9%	94 19%	85 17%	71 14%
Don't know	96 5%	19 4%	27 5%	27 5%	23 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 84

Q20_13 - To what extent do you agree or disagree with each of the following statements? - I like to buy beauty products or treatments from brands that are specifically for a diverse set of people

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	258 13%	64 13%	61 12%	74 15%	60 12%
Tend to agree	555 28%	157 31% d	138 28%	142 28%	117 23%
Neither agree nor disagree	632 32%	152 30%	149 30%	158 32%	173 35%
Tend to disagree	280 14%	68 14%	84 17% c	52 10%	75 15% c
Strongly disagree	169 8%	32 6%	50 10%	48 10%	39 8%
NET: Strongly / tend to agree	813 41%	221 44% d	199 40%	216 43% d	177 35%
NET: Strongly / tend to disagree	449 22%	100 20%	134 27% ac	100 20%	115 23%
Don't know	106 5%	27 5%	19 4%	26 5%	35 7% b

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 85

Q20_14 - To what extent do you agree or disagree with each of the following statements? - I am more likely to buy beauty products or treatments from brands that celebrate cultural diversity

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	249 12%	67 13%	59 12%	67 13%	56 11%
Tend to agree	576 29%	144 29%	147 29%	150 30%	135 27%
Neither agree nor disagree	628 31%	169 34%	148 30%	146 29%	166 33%
Tend to disagree	281 14%	65 13%	79 16%	69 14%	68 14%
Strongly disagree	144 7%	30 6%	38 8%	43 9%	34 7%
NET: Strongly / tend to agree	826 41%	211 42%	206 41%	217 43%	191 38%
NET: Strongly / tend to disagree	425 21%	94 19%	116 23%	112 22%	102 20%
Don't know	121 6%	26 5%	29 6%	26 5%	40 8%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 86

Q20_15 - To what extent do you agree or disagree with each of the following statements? - I like the fact that men can now wear make up

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	439 22%	101 20%	104 21%	118 24%	116 23%
Tend to agree	507 25%	140 28%	109 22%	134 27%	124 25%
Neither agree nor disagree	545 27%	147 29%	136 27%	136 27%	126 25%
Tend to disagree	241 12%	52 10%	73 15%	59 12%	58 12%
Strongly disagree	164 8%	30 6%	49 10%	33 7%	52 10%
NET: Strongly / tend to agree	946 47%	241 48%	213 43%	252 50%	240 48%
NET: Strongly / tend to disagree	405 20%	82 16%	122 24%	92 18%	110 22%
Don't know	103 5%	31 6%	28 6%	20 4%	24 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 87

Q20_16 - To what extent do you agree or disagree with each of the following statements? - I am happy with my current approach to skincare

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	324 16%	91 18% d	78 16%	95 19% d	60 12%
Tend to agree	693 35%	199 40% b	137 27%	170 34% b	187 37% b
Neither agree nor disagree	511 26%	114 23%	141 28%	121 24%	135 27%
Tend to disagree	282 14%	65 13%	80 16%	70 14%	67 13%
Strongly disagree	97 5%	14 3% a	30 6% a	29 6% a	24 5%
NET: Strongly / tend to agree	1017 51%	290 58% bd	215 43%	265 53% b	247 49%
NET: Strongly / tend to disagree	378 19%	79 16%	110 22% a	98 20%	91 18%
Don't know	94 5%	17 3% ac	34 7%	16 3%	27 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.


25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS
5 Mar 2026
Table 88
Q20_17 - To what extent do you agree or disagree with each of the following statements? - I prefer to adopt a simple approach to skincare
Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Strongly agree	420 21%	110 22%	103 21%	103 21%	104 21%
Tend to agree	732 37%	197 39% b	157 31%	170 34%	209 42% bc
Neither agree nor disagree	425 21%	104 21%	117 23%	108 22%	96 19%
Tend to disagree	227 11%	47 9%	62 12%	65 13%	53 11%
Strongly disagree	79 4%	13 3%	23 5%	25 5%	18 4%
NET: Strongly / tend to agree	1152 58%	307 61% bc	260 52%	273 55%	312 62% bc
NET: Strongly / tend to disagree	306 15%	61 12%	85 17% a	90 18% a	70 14%
Don't know	117 6%	28 6%	38 8% d	29 6%	21 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d
Overlap formulae used.
This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.

Table 89

Q21_Summary - How important, if at all, is it for you that the aesthetic treatments industry does the following?

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	Offer a wide range of products or treatments for different skin types	Represent and include diverse genders, backgrounds, and appearances	Emphasise ethical and cruelty-free practices	Consider environmental impact	Consider social impact	Be transparent about ingredients	Be transparent about processes	Be transparent about the risks
UNWEIGHTED BASE	2072	2072	2072	2072	2072	2072	2072	2072
WEIGHTED BASE	2000	2000	2000	2000	2000	2000	2000	2000
Very important	731	638	733	650	575	915	870	951
Fairly important	765	770	736	778	786	650	653	592
	38%	39%	37%	39%	39%	32%	33%	30%
Not very important	305	338	295	352	370	240	262	254
	15%	17%	15%	18%	18%	12%	13%	13%
Not at all important	81	120	113	102	113	94	92	98
	4%	6%	6%	5%	6%	5%	5%	5%
NET: Very important / Fairly important	1496	1409	1468	1428	1360	1565	1524	1543
	75%	70%	73%	71%	68%	78%	76%	77%
NET: Not at all important / Not very important	386	457	408	454	482	334	354	351
	19%	23%	20%	23%	24%	17%	18%	18%
Don't know	118	134	124	119	158	102	122	106
	6%	7%	6%	6%	8%	5%	6%	5%



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 90

Q21_1 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Offer a wide range of products or treatments for different skin types

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	731 37%	230 46% bcd	144 29%	180 36% b	178 36% b
Fairly important	765 38%	172 34%	184 37%	204 41% a	205 41%
Not very important	305 15%	51 10%	107 21% acd	81 16% a	67 13%
Not at all important	81 4%	12 2%	33 7% ac	13 3%	23 5%
NET: Very important / Fairly important	1496 75%	402 80% b	328 66%	384 77% b	383 77% b
NET: Not at all important / Not very important	386 19%	63 13%	140 28% acd	94 19% a	90 18% a
Don't know	118 6%	35 7%	33 7%	22 4%	27 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.


25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS
5 Mar 2026
Table 91
Q21_2 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Represent and include diverse genders, backgrounds, and appearances
Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	638 32%	210 42% bcd	131 26%	162 32% b	135 27%
Fairly important	770 39%	182 36%	180 36%	203 41%	204 41%
Not very important	338 17%	59 12%	117 23% acd	75 15%	86 17% a
Not at all important	120 6%	21 4%	44 9% ac	22 4%	32 6%
NET: Very important / Fairly important	1409 70%	392 78% bd	311 62%	365 73% b	339 68%
NET: Not at all important / Not very important	457 23%	80 16%	161 32% acd	98 20%	118 24% a
Don't know	134 7%	28 6%	27 5%	37 7%	42 8%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d
Overlap formulae used.
This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 92

Q21_3 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Emphasise ethical and cruelty-free practices

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	733 37%	233 47% bcd	160 32%	195 39% bd	145 29%
Fairly important	736 37%	191 38%	176 35%	171 34%	198 40%
Not very important	295 15%	43 9%	94 19% a	74 15% a	84 17% a
Not at all important	113 6%	16 3% a	40 8% a	27 5%	30 6% a
NET: Very important / Fairly important	1468 73% bcd	424 85% bcd	336 67%	366 73% b	343 69%
NET: Not at all important / Not very important	408 20%	58 12%	134 27% ac	101 20% a	114 23% a
Don't know	124 6%	18 4%	31 6%	33 7% a	43 9% a

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT

9TH - 26TH FEBRUARY 2026

PUBLIC

IPSOS

5 Mar 2026

Table 93

Q21_4 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Consider environmental impact

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	650 33%	181 36% b	138 28%	163 33%	169 34% b
Fairly important	778 39%	194 39%	202 40%	188 38%	193 39%
Not very important	352 18%	74 15%	107 21% ad	98 20%	74 15%
Not at all important	102 5%	24 5%	29 6%	19 4%	29 6%
NET: Very important / Fairly important	1428 71% b	375 75% b	339 68%	351 70%	363 73%
NET: Not at all important / Not very important	454 23% ad	98 20%	136 27% ad	117 23%	102 20%
Don't know	119 6%	27 5%	24 5%	32 6%	35 7%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT

9TH - 26TH FEBRUARY 2026

PUBLIC

IPSOS

5 Mar 2026

Table 94

Q21_5 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Consider social impact

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	575 29%	161 32% b	114 23%	161 32% b	138 28%
Fairly important	786 39%	205 41% c	195 39%	173 35%	214 43% c
Not very important	370 18%	78 16%	118 24% ad	94 19%	80 16%
Not at all important	113 6%	18 4%	39 8% a	30 6%	25 5%
NET: Very important / Fairly important	1360 68%	366 73% bc	308 62%	334 67%	352 70% b
NET: Not at all important / Not very important	482 24%	96 19%	158 32% acd	124 25% a	104 21%
Don't know	158 8%	38 8%	34 7%	42 8%	44 9%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT

9TH - 26TH FEBRUARY 2026

PUBLIC

IPSOS

5 Mar 2026

Table 95

Q21_6 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Be transparent about ingredients

Base: All Adults aged 18-25 in the UK/DE/IT/ES

	TOTAL	COUNTRY			
		UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	915 46%	260 52% bc	191 38%	224 45% b	241 48% b
Fairly important	650 32%	159 32%	164 33%	179 36% d	148 30%
Not very important	240 12%	33 7%	87 17% ac	57 11% a	64 13% a
Not at all important	94 5%	22 4%	29 6%	17 3%	25 5%
NET: Very important / Fairly important	1565 78%	418 84% bd	355 71%	403 81% b	389 78% b
NET: Not at all important / Not very important	334 17%	55 11%	116 23% acd	74 15%	89 18% a
Don't know	102 5%	27 5%	29 6%	23 5%	22 4%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT
9TH - 26TH FEBRUARY 2026
PUBLIC
IPSOS

5 Mar 2026

Table 96

Q21_7 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Be transparent about processes

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	870 44%	259 52% bd	160 32%	227 45% b	224 45% b
Fairly important	653 33%	162 32%	187 37% cd	149 30%	155 31%
Not very important	262 13%	38 8%	86 17% a	76 15% a	63 13% a
Not at all important	92 5%	12 2% a	32 6% a	20 4%	28 6% a
NET: Very important / Fairly important	1524 76%	421 84% bcd	347 69%	376 75% b	379 76% b
NET: Not at all important / Not very important	354 18%	49 10%	117 23% a	96 19% a	91 18% a
Don't know	122 6%	29 6%	35 7%	28 6%	30 6%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.



25-061766-05 - THE BEAUTY SHIFT

9TH - 26TH FEBRUARY 2026

PUBLIC

IPSOS

5 Mar 2026

Table 97

Q21_8 - How important, if at all, is it for you that the aesthetic treatments industry does the following? - Be transparent about the risks

Base: All Adults aged 18-25 in the UK/DE/IT/ES

		COUNTRY			
	TOTAL	UK (a)	Germany (b)	Spain (c)	Italy (d)
UNWEIGHTED BASE	2072	514	512	523	523
WEIGHTED BASE	2000	500	500	500	500
Very important	951 48%	271 54% bc	190 38%	238 48% b	252 50% b
Fairly important	592 30%	140 28%	163 33%	150 30%	138 28%
Not very important	254 13%	45 9%	83 17% ad	67 13% a	58 12%
Not at all important	98 5%	19 4%	29 6%	21 4%	29 6%
NET: Very important / Fairly important	1543 77%	411 82% b	353 71%	388 78% b	390 78% b
NET: Not at all important / Not very important	351 18%	64 13%	112 22% a	88 18% a	87 17%
Don't know	106 5%	25 5%	34 7%	24 5%	23 5%

Proportions/Mean: Columns Tested (5% risk level) - a/b/c/d

Overlap formulae used.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.