

# BEAUTYSTREAMS



How to understand consumer behavior:  
Macro & Beauty Movements 2022-2026

PCD Talks  
June 29, 2022



# BEAUTYSTREAMS

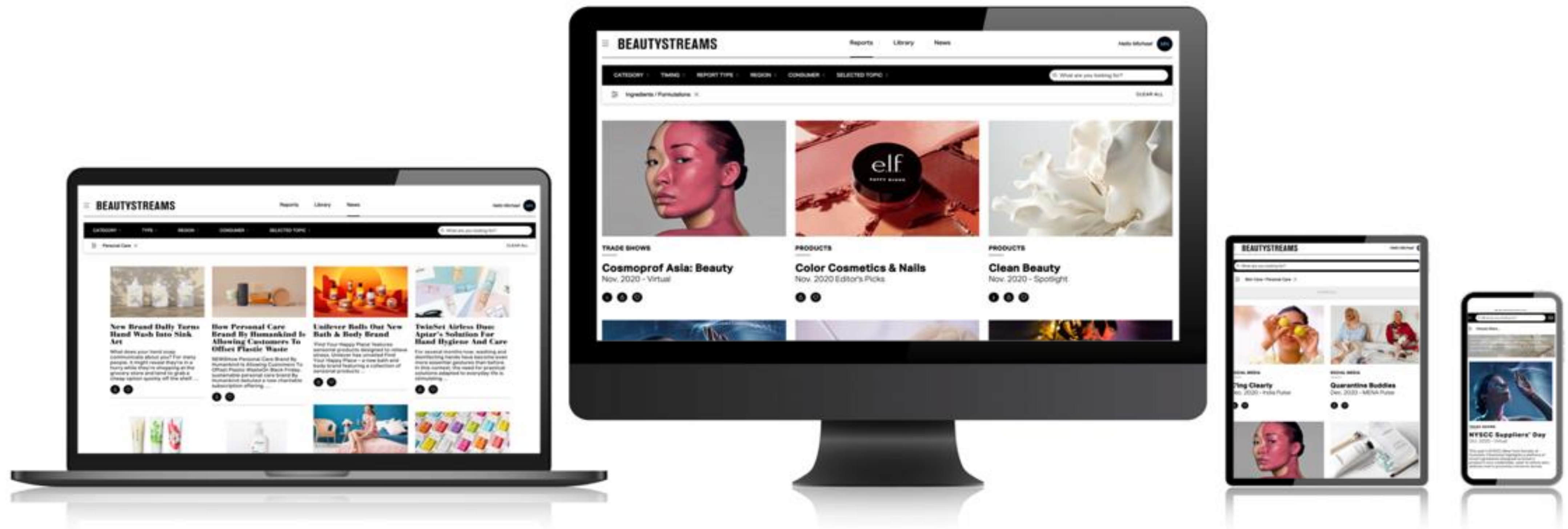
The Global  
Beauty Industry Reference

About Us



# The Go-to Source for Beauty Industry Insights

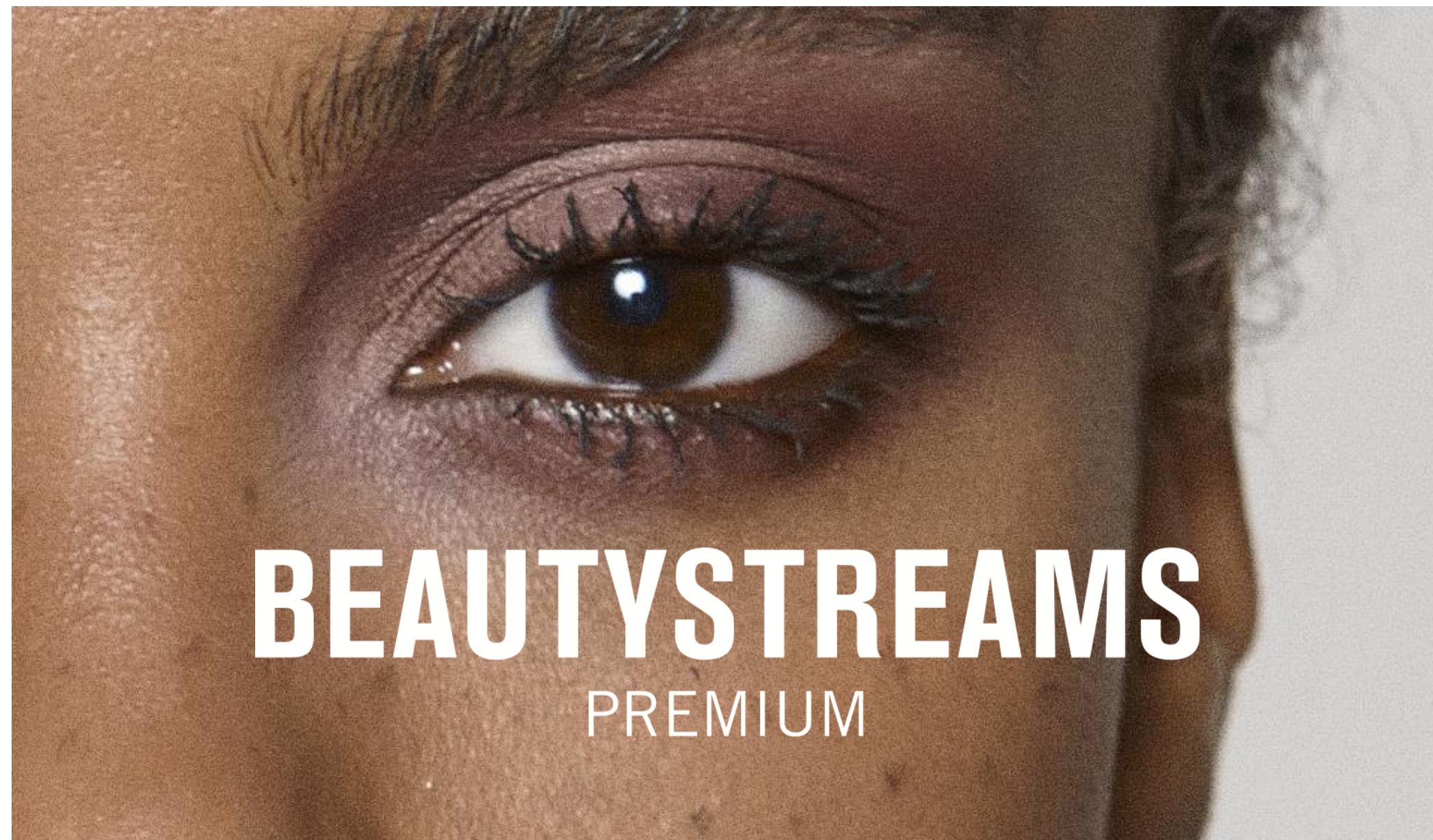
BEAUTYSTREAMS is the indispensable platform for trend and market insights. Ever-evolving changes in consumer lifestyles strongly impact buying habits in the beauty sector. Companies that are well-informed and agile will stay ahead in today's challenging market. BEAUTYSTREAMS is a valuable reference tool for strategy, product development, and marketing teams worldwide.



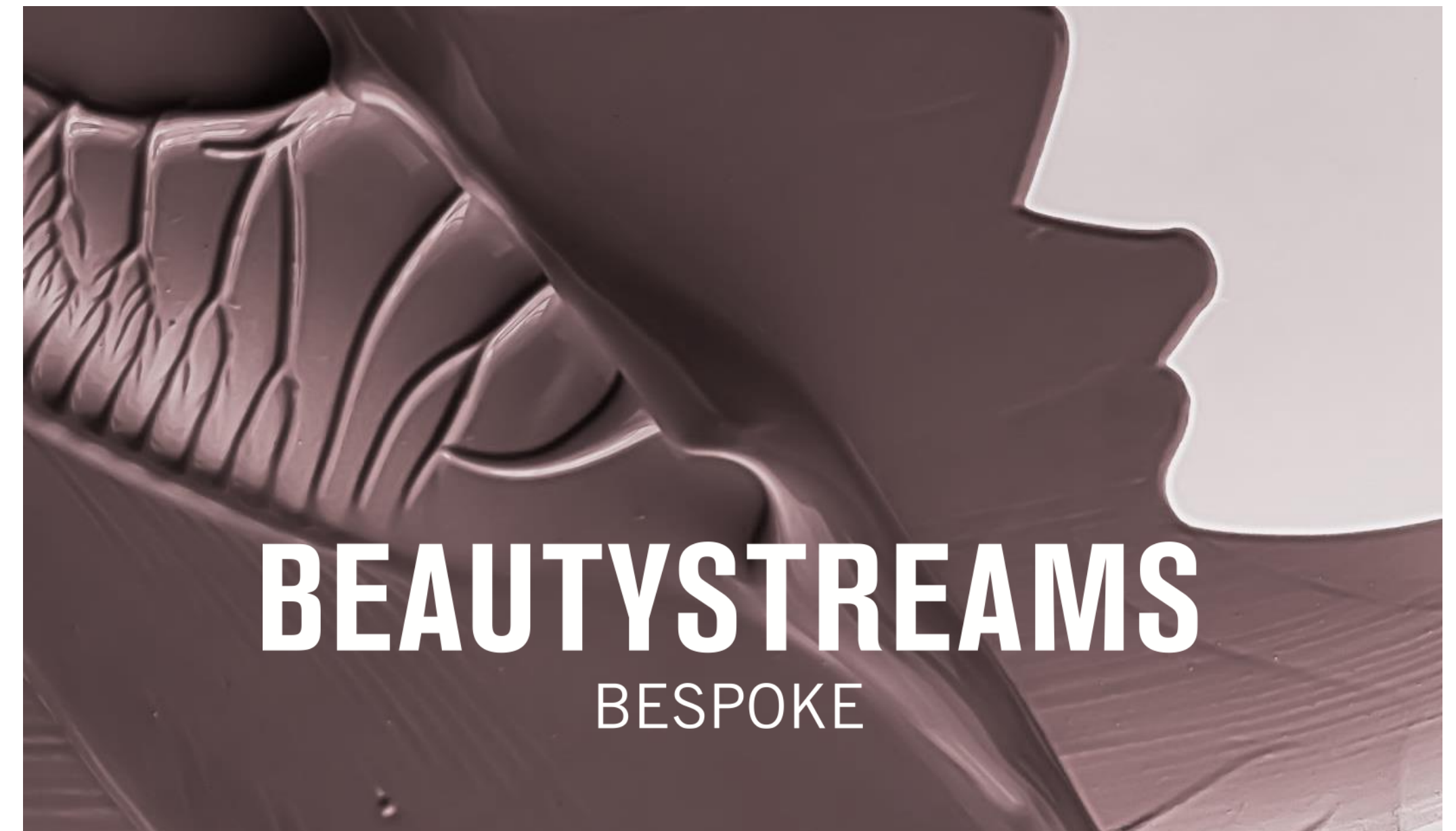


# Keep On the Pulse

BEAUTYSTREAMS is the go-to insights platform for the global beauty industry. It is the key reference point for strategy, product development, and marketing teams worldwide. We offer two different types of services.



Our BEAUTYSTREAMS Premium site gives you access to strategic, daily industry insights. It also includes an extensive Product Bank, Influencer Bank, and Image Bank.



Our Bespoke Consultancy offers proprietary solutions by leading beauty experts, specifically tailored to your company's needs.



OUR CLIENTS  
(SAMPLE LIST)

# Join Our Vast Community

BEAUTYSTREAMS members span six continents and include all types of organizations,  
from indie to corporate giants, local to international, mass to luxury.

AMOREPACIFIC

A.S. Watson Group  
A member of CK Hutchison Holdings



b.kolor  
*Make up & skin care*

BABOR

Beiersdorf

BVLGARI

CHANEL

COSMAX  
THE SCIENCE OF KOREAN BEAUTY

COTY

DEBORAH  
MILANO

eurofins

Givaudan

Godrej

Grupo Boticário

intercos  
GROUP

kolmar  
한국콜마

KIKO  
MILANO

LANCÔME  
PARIS

L'ERBOLARIO

L'ORÉAL

LUMÈNE

MARIE  
DALGAR

MAYBELLINE  
NEW YORK

MECCA  
BRANDS

MERCK

natura

P&G

ROSSMANN  
*Mein Drogeriemarkt*

SEPHORA

SHISEIDO  
GINZA TOKYO

shu uemura  
tokyo paris new york

ULTA  
BEAUTY

WELLA  
PROFESSIONALS

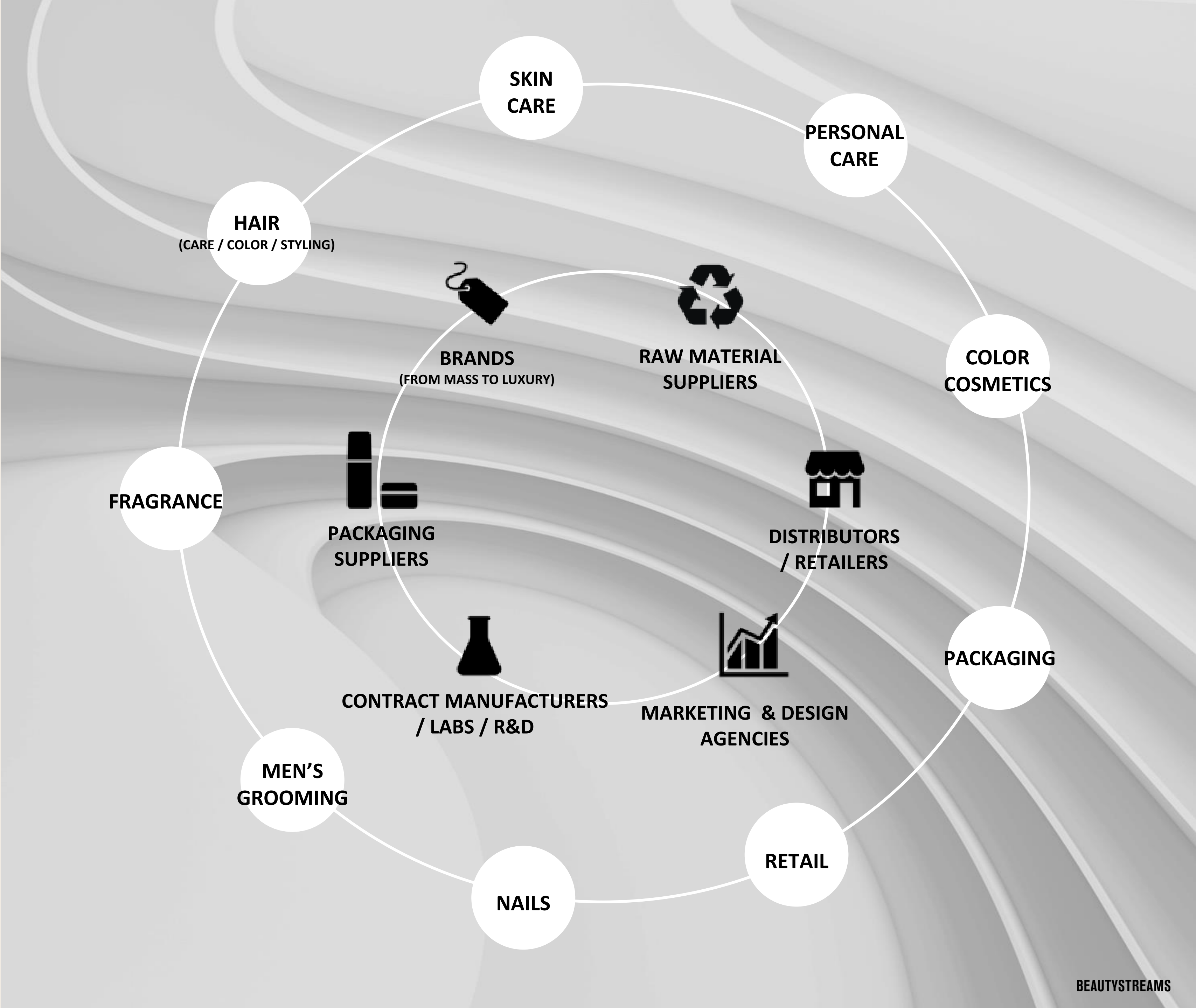
YVES SAINT LAURENT

YVES ROCHER

CLIENT PROFILES

# The Full Beauty Supply Chain

BEAUTYSTREAMS works with companies throughout the full beauty supply chain including raw materials suppliers, contract manufacturers, packaging suppliers, brands, agencies, and retailers. Their strategy, R&D, innovation, product development, and marketing teams trust BEAUTYSTREAMS insights daily.



METHODOLOGY

# The BEAUTYSTREAMS Trend Funnel Methodology

Our BEAUTYSTREAMS Trend Funnel methodology links wide-ranging, societal and consumer movements to current trends on the market today. We interpret trends into actionable product development innovation and marketing concepts.



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A close-up photograph of a stream. The water is calm, reflecting the surrounding greenery and sky. In the foreground, there are several plants: a green, segmented stem (possibly a cactus or succulent) on the left, a dark purple, textured flower bud in the bottom left corner, and a plant with a blue, spiky flower head and several long, white, fuzzy seed pods on the right. The background shows more green foliage and the continuation of the stream.

# **BEAUTYSTREAMS MACRO MOVEMENTS 2022-2026**

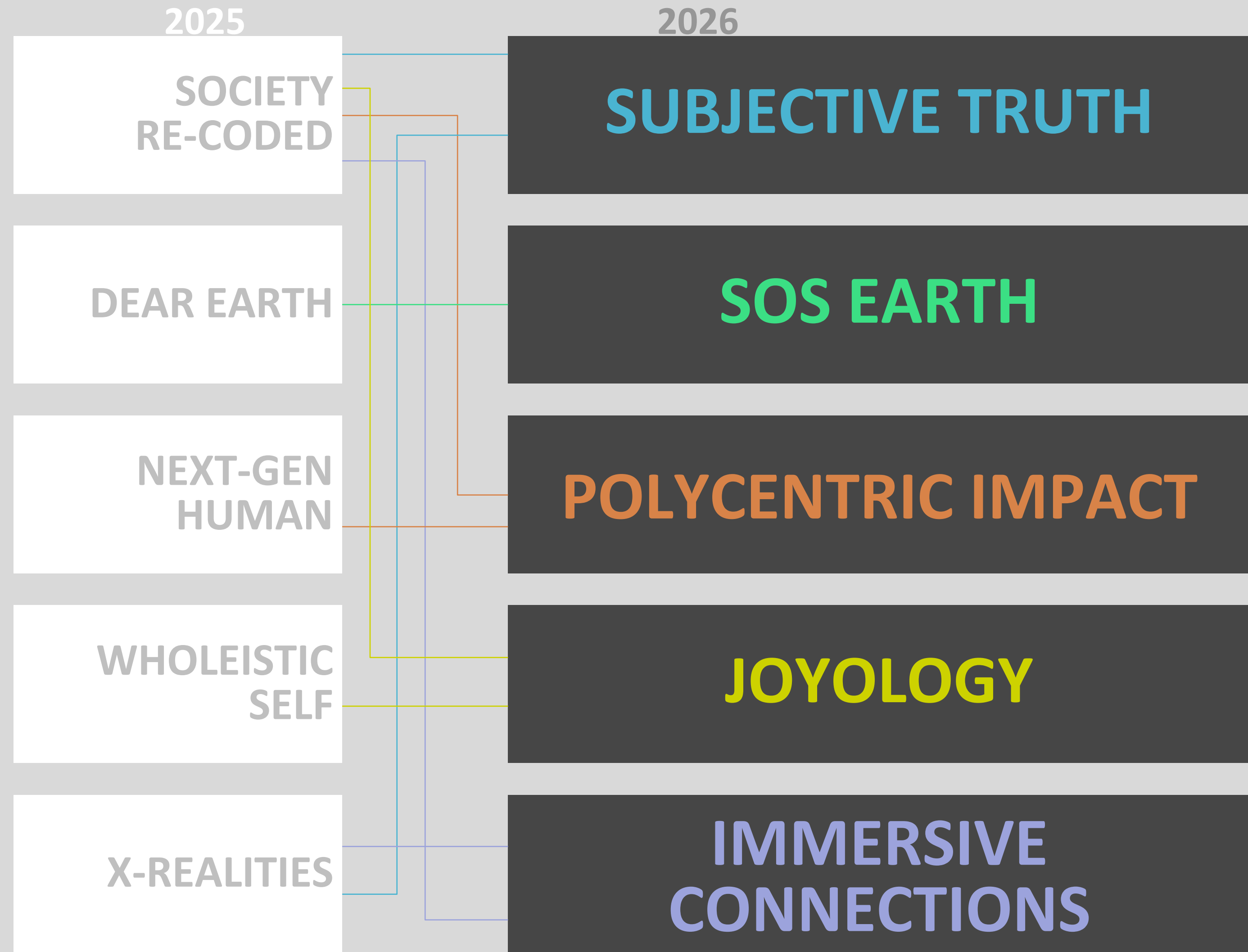


*Entering a new world equilibrium  
of novel ethical and virtual  
dimensions*





# MACRO MOVEMENT EVOLUTIONS 2025-2026



# SUBJECTIVE TRUTH

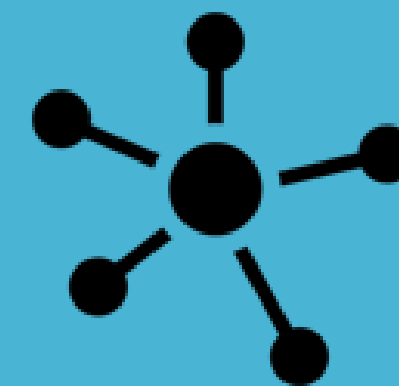
*Ever-evolving technology shapes personal perception, eventually leading to the radicalization of opinions.*



Data Management



Customization



Social Commerce



# SUBJECTIVE TRUTH

*Ever-evolving technology shapes personal perception, eventually leading to the radicalization of opinions.*

**66%**

of respondents think that

**SOCIAL MEDIA WILL BECOME  
THE MOST  
IMPORTANT  
ONLINE  
CHANNEL**

by end 2020 there were

**150m**

**MORE SOCIAL  
NETWORK USERS  
THAN BEFORE  
THE PANDEMIC**

**89%**

of US adults believe that

**SOCIAL MEDIA SITES  
ARE MOSTLY OR PARTIALLY  
RESPONSIBLE FOR  
THE SPREAD OF  
FAKE NEWS**

**54%**

of social browsers

**USE SOCIAL MEDIA  
TO RESEARCH  
PRODUCTS**

# SOS EARTH

*For the planet to survive, sustainable and reparative actions  
take on a new, global urgency.*



Restorative Actions



Biotech



Water Footprint



# SOS EARTH

*For the planet to survive, sustainable and reparative actions take on a new, global urgency.*

**73%**

of respondents think that  
**SUSTAINABILITY IS THE  
MOST URGENT  
PHILANTHROPIC  
PRIORITY**

In the first half of 2020 alone

**9.8m**

**PEOPLE WERE  
CONSIDERED  
CLIMATE REFUGEES**

**\$39b**

will be the size of the  
**GLOBAL NATURAL  
FRAGRANCE  
MARKET BY  
2025**

**43%**

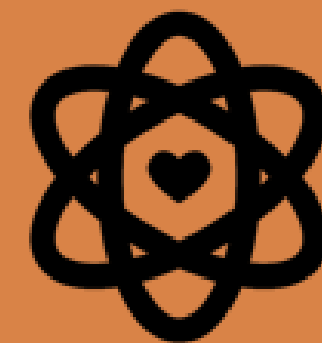
**OF GEN Z US CONSUMERS  
ARE WILLING TO PAY  
MORE FOR SUSTAINABLE  
PRODUCTS**

# POLYCENTRIC IMPACT

*A truly global world that embraces both  
diversity and cross-pollination.*



Power Shifts



Ethical Development



True Inclusivity





# POLYCENTRIC IMPACT

*A truly global world that embraces both  
diversity and cross-pollination.*

By  
2024

**India**

is set to be the world's  
**5th largest  
economy.**

Over the last  
12 months,

more than

**60 countries**

**have experimented  
with  
national digital  
currencies.**

**China's**

global share of research papers  
**in the field of  
AI surpasses**  
any other country in the world,  
including the US.

In the US

**56%**

**of millennials  
agree that  
binary gender labels  
are  
outdated.**

# JOYOLOGY

*The greatest luxury is happiness.*



Holistic Life



Physical Health



Psychological Wellness





# JOYOLOGY

*The greatest luxury is happiness.*

Globally,  
an estimated  
**264 million**  
people suffer from  
depression.

**Suicide**  
is Gen Z's  
**second-leading**  
cause of death.

The main  
sources of  
happiness globally  
**are relationships,  
health,  
and safety.**

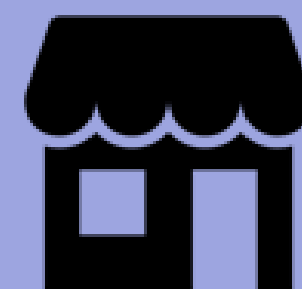
According  
to research,  
**the happiness**  
**of a close contact**  
increases the chance  
of being happy by  
**15%.**

# IMMERSIVE CONNECTIONS

*Togetherness powered by “phygital” relationships.*



**Into the  
Metaverse**



**Redefining  
Brick-and-Mortar**



**Health  
& Beauty Tech**



# IMMERSIVE CONNECTIONS

*Togetherness powered by “phygital” relationships.*

**China**  
is the  
**Biggest  
Gaming  
Market**  
in the World

**60%**  
of Chinese  
**Gen Z**  
are open to  
**Pay Money  
on Virtual Goods**

**63%**  
of Chinese  
Gen Z  
Like to  
**Make Friends  
Through Their  
Avatars**

**3.5**  
★★★★★  
Is the rating on 5.0  
about the statements  
**“I Need to touch  
a product”**  
before buying it

# **BEAUTYSTREAMS BEAUTY MOVEMENTS 2022-2024**





# BEAUTY MOVEMENTS 2022-2024 OVERVIEW

Discover up-trending beauty movements for the next 3 years. All are defined to inspire all categories including skin and personal care, make-up, nails, and fragrance as well as all genders and age groups.



## SWITCH-OFF & SWITCH-ON

The art to disconnect and re-connect.



## SCIENTIFICALLY SAFE

Medical and scientific credentialism assure safety.



## HYPER-LOCALISM

The rise of super-local inspirations and innovations.



## LAB-GROWN NATURALS

Biotechnology can solve sustainable production and sourcing.



## BIO-SENSORIALITY

Embracing the multi-sensorial aspects of natural ingredients.



## ETHICALLY CORRECT

Showing impeccable ethical behavior in all aspects.



# SWITCH OFF & SWITCH ON

*The art to disconnect and re-connect.*





# SWITCH OFF & SWITCH ON

*The art to disconnect and re-connect.*

## Self-Care Perfume

Fine fragrance evolves from evoking emotion and sophisticated storytelling to leveraging the impact of specific ingredients on the olfactory system in order to deliver psychological benefits and promote inner balance.

## Ritualistic Beauty

A new mindfulness is now applied to ritualistic beauty. Whether ancestral or newly invented rituals, the focus is now on actively promoting 'digital detox' by way of multisensorial experiences in textures, colors and scents.

## Cognitive Care

Cognitive care is emerging as a new category in beauty whereby nootropics such as L-theanine and lion's mane are featured in wellness supplements to enhance peak mental performance.

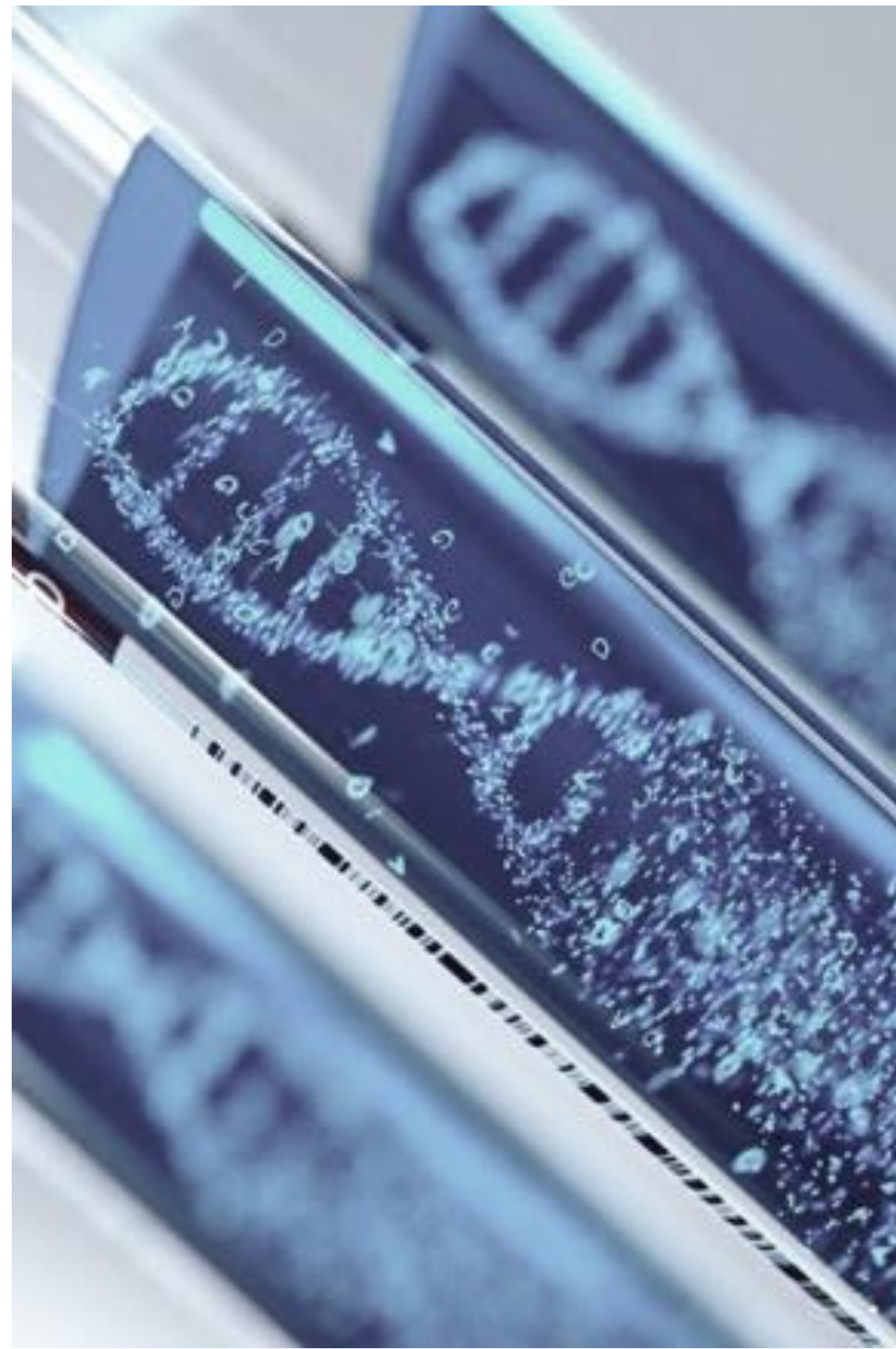
## Premium Personal Care

Against the backdrop of economic recession where consumers are trading down in a number of categories, premium personal care and at-home spa experiences offer longed-for moments of indulgence.



# SCIENTIFICALLY SAFE

*Medical and scientific credentialism assure safety.*





# SCIENTIFICALLY SAFE

A background image of laboratory glassware, including petri dishes with yellow liquid and test tubes, overlaid with a grid of four grey boxes containing text.

*Medical and scientific credentialism assure safety.*

## Germophobia

Fear of germs is intensifying innovation aimed at reducing the transmission of bacteria and viruses.

## Immunity Boosters

A strong immune system plays a critical role in staying safe and healthy.

## Allergen-Free

Clean beauty has been redefined to prioritize safety over pure naturals, as well as transparent ingredient labels.

## Cognitive Fitness

Mental health and cognitive clarity is as important as physical wellbeing.



# HYPER-LOCALISM

*The rise of super-local inspirations and innovations.*





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*The rise of super-local inspirations and innovations.*

## Regional Dev. Priorities

Local production and educational campaigns are key initiatives that will fuel regional development.

## TCM & Ayurveda

The oldest systems of medicine and well-being are entering the mainstream.

## Tribal Beauty

Native-American traditions resonate with indigenous consumers.

## Nomadic Africa

African historical and cultural rituals encapsulate a wealth of folk remedies.

## Local Pride In China

Chinese consumers are proudly embracing their local heritage which is fueling brand growth.

## Glocal Hybrids

"Glocal hybrids" are a means to update local tastes and traditions by incorporating modern touches.



# LAB-GROWN NATURALS

*Biotechnology can solve sustainable production and sourcing.*





# LAB-GROWN NATURALS

*Biotechnology can solve sustainable production and sourcing.*

## Biotech Skin & Personal Care

Lab-produced skin-care ingredients such as peptides, squalane and fermented polysaccharides bypass the carbon footprint of plant-derived ingredients.

## Palm Oil Alternatives

Biotech companies are using innovative, environmentally-conscious processes found in nature to brew sustainable alternatives to palm oil.

## Biotech Preservatives

The pandemic has accelerated the demand for natural alternatives to chemical preservatives, ensuring safety and longer product shelf life.

## High-performing Hair Care

New and sustainable ways of producing hair-care ingredients can be labeled as "natural" while also meeting consumer demand for product performance.

## Back-to-natural Fragrance

Many fragrance companies are going back to basics, leveraging the natural process of plant enzymes to convert sugars into fragrance compounds.

## Bio-based Packaging

Companies are taking sustainable packaging to new heights by growing advanced materials that replace plastics.



# BIO-SENSORIALITY

*Embracing the multi-sensorial aspects of natural ingredients.*





# BIO-SENSORIALITY

*Embracing the multi-sensorial aspects of natural ingredients.*

## Natural Alternatives To Silicone

Green alternatives to silicone are environmentally friendly, affordable, and high-performing.

## Sustainable Emulsifiers

Plant-based emulsifiers are easily identified and are aligned with conscious consumerism, unlike their chemical counterparts.

## Growing Need For Palm-oil Alternatives

Companies are beginning to replace palm oil-based formulations with natural alternatives that have equivalent properties.

## Natural Pigments

Innovations in technology will focus on the sustainable and ethical extraction of natural pigments.



# ETHICALLY CORRECT

*Showing impeccable ethical behavior in all aspects.*





# ETHICALLY CORRECT

*Showing impeccable ethical behavior in all aspects.*

## Active Contribution

Brands are championing change and harnessing the power of their communities to take a public stand on social, political and sustainability issues.

## All Together

Creating inclusive cultures means avoiding terms such as 'multicultural' or 'ethnic' to designate non-Caucasians and targeting need rather than ethnicity.

## Cultural Sensitivity

A truly multicultural brand incorporates cultural sensitivity in product and communication development and adapts to local communication styles.

## Restorative Actions

Going beyond a zero waste mindset involves not just reducing or eliminating waste, but actively reuse it. This requires reimagining what waste is.

## From 'Made In' to 'Made by'

Showing the people and stories behind a brand helps humanize it and create a direct link to the target consumer.

**STOP  
AGE  
ANXIETY.**



openstreams  
foundation

**STOP  
AGE  
ANXIETY.**

Challenging  
the Youth Dictate









**STOP  
AGE  
ANXIETY.**

**openstreams foundation**

**JOIN THE MOVEMENT  
#StopAgeAnxiety**

**[www.openstreamfoundation.org](http://www.openstreamfoundation.org)  
@openstreams\_foundation**





# BEAUTYSTREAMS MACRO & BEAUTY MOVEMENTS OVERVIEW



## MACRO MOVEMENTS 2022-2026

SUBJECTIVE TRUTH

SOS EARTH

POLYCENTRIC  
IMPACT

JOYOLOGY

IMMERSIVE  
CONNECTIONS

## BEAUTY MOVEMENTS 2021-2024

Switch Off  
& Switch On

Ethically  
Correct

Scientifically  
Safe

Hyper  
Localism

Lab-grown  
Naturals

Bio-  
Sensoriality



# BEAUTYSTREAMS

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Merci.