

# A NEW WORLD DISORDER?

## Navigating the polycrisis

Key Takeouts for the BEAUTY &  
PERSONAL CARE SECTOR

GLOBAL  
TRENDS  
2023



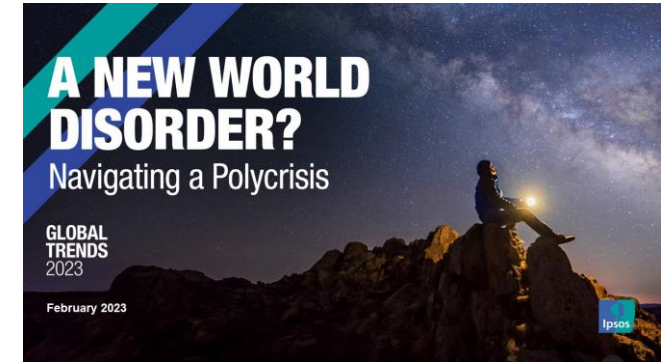
# TRACKING HOW ARE PEOPLE CHANGING

Since 2013 Ipsos has been tracking the values, attitudes and behaviours of people around the world via our Ipsos Global Trends service (IGT). This year’s survey, conducted at the end of 2022, is our biggest ever, comprising some 48,000+ interviews across 50 markets, with strong representation across all regions, allowing us an unprecedented window into the lives and concerns of the public.

Understanding change within any sector is about understanding both top-down and bottom-up change:

- **Top-down change** refers to broad cross-category changes. These affect people irrespective of their relationship with specific product categories but will have different impacts from one sector to another
- **Bottom-up change** refers to specific changes within individual categories – both changes in what users need and want, and changes in what those in category bring to the market and how they do so

Ipsos Global Trends is a hugely valuable resource to understand top-down change. Our 2023 report entitled “**A NEW WORLD DISORDER? Navigating the polycrisis**” is available for download and covers the key dimensions driving change, including 6 Macro Forces (that cover 26 more detailed themes) and 12 consumer trends that we have been tracking since 2019.



## At a glance: the Ipsos Global Trends

In 2019 we used advanced analytics and perspectives from our team of trends and foresight experts to analyse 370 questions across 36 markets, identifying 36 global values and 12 trends, which we have been tracking ever since.

Since then, our annual updates have highlighted how our 12 trends (which cover populism, brand-building, climate change, technology, data security, politics and social issues) have changed – or not changed – over time.

We are delighted to be able to share with you what they look like in 2023, blending our latest data, local signals, our updated Macro Forces and some thought-starter provocations on what they might mean for your organisation, whether it is a government department, a corporation or an NGO.

We hope you find these insights thought-provoking.



# WHAT DOES THIS MEAN FOR THE BEAUTY & PERSONAL CARE SECTOR?

In this document, our **Beauty & Personal Care** category experts have evaluated the macro force and trend dimensions covered in IGT and identified the key factors that will shape the **Beauty & Personal Care sector** during 2023 and beyond.

From these, we have identified the **five key drivers of change** and brainstormed some thought-starter implications for each.

Once you have digested these, please:

- Download our free Global Trends report for 2023 for more insight, data, marketplace signals and thought-starters relating to the Macro Forces and trends described in this document, : <https://www.ipsos.com/en/global-trends>
- Contact us to discuss how we can help you navigate the polycrisis and beyond.
- Definitions of beauty are highly driven by cultural factors and traditions. The trends we have outlined in this document are global in nature but, of course, will vary widely from one market to another. We can leverage our 50 country dataset to help you understand what these trends look like in the markets you care about.



# IPSOS GLOBAL TRENDS COVERS SIX MACRO FORCES (INCLUDE 26 DETAILED THEMES) AND 12 GLOBAL TRENDS

## Our six global Macro Forces and key themes

Operating at a broad level, Macro Forces have far-reaching impacts within countries and across borders, affecting societies, markets and people.

Societies in Flux	Tech-celeration	Inequalities and Opportunities	Environmental Emergencies	Political Splintering	Well-rounded Well-being
Ageing populations	Pervasive technology	Rise & fall of middle classes	Climate change	Plateau of globalisation	Growing mental health crisis
Community migration	The immersive frontier	Employee power shift	A greener way of thinking	Security dilemmas	Systemic health inequality
Life stage evolutions	AI advances & quantum computing	Generational wealth disparities	Over-development	Rethinking institutions	Integration of health & technology
Greater ethnic & religious diversity	Increased automation	Impacts of inflation		Increasing geopolitical conflicts	
Identity fluidity	Toll of technology	Alternative value structures		Entrenched inequality	

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# THESE BROADER MACRO FORCES AND GLOBAL TRENDS DRIVE CHANGE IN THE BEAUTY AND PERSONAL CARE SECTOR



## DRIVERS OF CHANGE IN BEAUTY AND PERSONAL CARE

DIVERSE & INCLUSIVE BEAUTY

THE SHIFTING GOALPOSTS FOR AUTHENTIC BEAUTY

AGE APPROPRIATENESS FOR THE BEAUTY INDUSTRY

A GROWING ROLE FOR TECHNOLOGY IN BEAUTY

SUSTAINABLE BEAUTY



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# DIVERSE & INCLUSIVE BEAUTY

## THE WHAT?

### What trends drive diverse & inclusive beauty?

Macro Forces:  
**IDENTITY FLUIDITY** and  
**GREATER DIVERSITY**

Trends:  
**DIVIDED WORLD**

The pandemic was (we hope) a rare event. It could have united the world against a common enemy. Instead, forces worked to drive and expand wedges between people in many nations about precautions and vaccines.

The global Black Lives Matter movement also exposed rifts and divisions in a push for equality, a value we as global society mostly share.

Yet, it is clear, that liberalism and tolerance are the majority views and that the right of self-definition and self-determination are regarded as fundamental rights.

**83%**

of global consumers agree 'It is up to everybody to work out their own set of principles to guide their decisions'

**70%**

of global consumers agree 'Transgender men and women should be free to live their lives as they wish'

## THE "SO WHAT"?

### What might this mean for the Beauty & Personal Care sector?

The beauty industry is rapidly waking up to the inclusivity and diversity opportunity. The industry is working hard to be more inclusive but there is still a lot more that can be done. But with a sizeable number of consumers rewarding inclusive brands with their custom, the business case behind developing and promoting more inclusive products and services is becoming harder to ignore. The rise of male grooming, recognition that different ethnic groups need different cosmetic products and the rise of LGBT+, Non-Binary and Gender Fluid beauty are all building the business case for a transition to a positioning of gender and sexual neutrality. Brands must re-evaluate the ways in which they categorise and describe their product offering and ensure their marketing communications are as diverse and inclusive as possible.

**Are we now in an age of beauty for all with the rise of inclusive and targeted products?**

## WHO IS ALREADY ACTING ON THIS?

### Marketplace innovations are addressing the need for diversity in beauty solutions



Dove and LinkedIn partner to help end race-based hair discrimination in the US. Their [initiative](#) includes LinkedIn Learning courses, sharing the findings from the CROWN beauty study to drive and featuring and promoting the voices of Black women to bring natural hair and protective styles into the fold.



"Whose Color?" is a new campaign from Faber-Castell to promote their new range of [Caras and Cores](#) skin colour pencils.

# THE SHIFTING GOALPOSTS FOR AUTHENTIC BEAUTY

## THE WHAT?

What trends drive authenticity?

Macro Forces:  
**GEOPLITICAL CONFLICTS**  
**IDENTITY FLUIDITY**

Trends: **AUTHENTICITY IS KING**

The way society defines beauty has always ebbed and flowed with changing fashions over body type, complexion and so on. But over the past twenty years or so, a more profound reassessment has been taking place. The 1980s and 90's could be characterised as the age of the supermodel, with aspirations to flawless beauty putting huge pressure on people to live up to these lofty ideals and great stress a common result of "falling short". More recently we saw supermodels being superseded by internet Influencers but the pressure remained. Now, though, we seem to be entering a time of more holistic, more consumer-driven ideas of beauty where self-confidence, comfort in normal imperfections and the freedom to "do you" co-exist alongside more traditional definitions of beauty for those who choose to prioritise them.

**52%**

are willing to pay extra for a brand image that appeals to them

**80%**

feel it is possible for a brand to support good causes and make money at the same time

## THE "SO WHAT"?

What might this mean for the Beauty & Personal Care sector?

There is a growing emphasis on naturalness in beauty. However, when it comes to the look cosmetic users are aiming to achieve, 'natural' doesn't so much mean natural as 'natural-looking'. Evidence suggests it can take up to 29 minutes a day to get "a natural look". Where naturalness is becoming more compelling, is in the use of natural ingredients, with large numbers of consumers keen to buy more natural products. Authenticity is also evident in other ways in the industry too; increasingly customers of all companies, including those in the beauty and personal care sector, expect brands to do more than merely sell products. The beauty industry has a opportunity (or is it even an imperative?) to embrace the causes and issues that its customers care about, and these can include both industry-facing issues such as body image, and more societal issues such as discrimination, sustainability and inequality. **How do Beauty and personal care manufacturers stay authentic in this kind of complex world?**

## WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are focusing on authentic beauty



Coty have called on dictionaries to modernize and update their definitions of beauty. [#UndefineBeauty](#) recognizes that current English language definitions of the term 'beauty' are outdated and "no longer reflect the values of today's society".

Coty quoted examples such as "*She was a great beauty in her youth*", which they said was often included in dictionaries to characterise the definition of beauty, adding that many similar entries are both limiting and exclusive.

# AGE APPROPRIATENESS FOR THE BEAUTY INDUSTRY

## THE WHAT?

### What trends drive convenience?

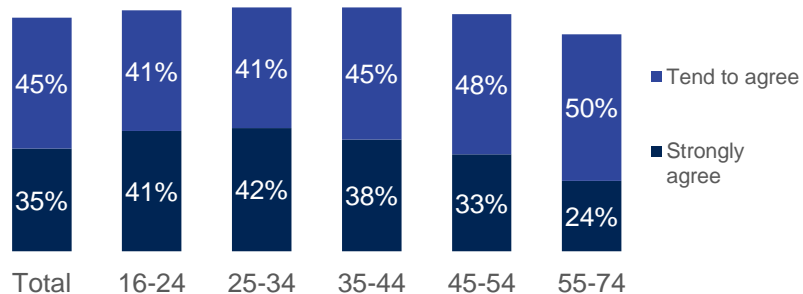
Macro Forces:  
**AGEING SOCIETIES** and  
**FLUID IDENTITIES**

Trends: **INEQUALITY & UNCERTAINTY** and  
**DIVIDED WORLD**

The population is ageing in most countries, creating a brain drain for businesses and putting pressure on economies and social care programmes. The birth rate is below the replacement rate everywhere in the world, except Africa.

Economic pressures are being felt all across the age spectrum and there is an erosion of attitudes, values and behaviours that used to be strongly tied to age. One example is shown below: while it is more marked among the young, all ages feel that their mental health is suffering.

### I need to do more to look after my mental well-being.



## THE “SO WHAT”?

### What might this mean for the Beauty & Personal Care sector?

#### Gen Z and Millennials

Traditional definitions of gender, sexuality, ethnicity and identity are becoming less restrictive and more inclusive. Technology has enabled different online/offline personalities, offering fluidity in how and when one identifies a particular way. This trend is particularly marked amongst the young sections of society.

Beauty and personal care products need to cater to the fluid identities and lifestyles of young people, offering them limitless possibilities for self-expression and moment-to-moment variability in their look.

Gen Z also learn about beauty and personal care products in a very different way than their older peers. The rise of YouTube and Instagram beauty influencers (or “content producers” as many of them prefer to be known) has been well documented. Stars such as Nikkie de Jager, Jeffree Star, Kandee Johnson, Zoella and Jamie Genevieve have followers in the millions and their posts and videos attract widespread attention. Reaching Gen Z with beauty messaging requires a fast-changing and profound mindset shift.

#### Seniors

Society is reassessing ageing. Greater life expectancy and ageing populations mean more of what we used to call ‘seniors’, But, that term is becoming less appropriate and less accepted by those it is aimed at. People of all ages are more likely to recognise the strengths and abilities of older people as potential role models.

Within the cosmetics industry, we’ve seen a shift away from trying to ‘defeat’ ageing to enabling consumers of all ages to look their best. Again, the prevailing view seems to be that the industry is trying hard but can still do better.

As the value of pension pots get eroded by the cost of living crisis, and the falling birth rate means fewer young people entering the jobs market, governments and employers are trying to encourage people to postpone retirement or to entice those who have retired back into the workplace. As they do so, it is likely they will want to pay more attention to the way they look with lots of potential opportunities for beauty and personal care products and services.

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# A GROWING ROLE FOR TECHNOLOGY

## THE WHAT?

What trends do we see in data & technology?

Macro Forces:  
**TECH-CELERATION**

Trends: **DATA DILEMMAS**  
and **THE TECH DIMENSION**

Whether it's that eerily accurate advert that pops up after you and your spouse have agreed to buy a new sofa, or your quick acceptance of the default cookie settings on a website so you can read an article a colleague just sent you, at times we all question who has our data and what they're doing with it. But how much do people *really* care? And perhaps more importantly, are they willing to do something about it? The rapid pace of technological change and disruption over the past few decades cannot be understated. However, years on, many people are wondering whether the promises made by Big Tech have been kept, and what we need to do collectively to harness the potential of tech – and mitigate its risks.

**71%**

can't imagine life without the internet

**81%**

feel that it is inevitable that we will lose some privacy in the future because of what new technology can do

## THE “SO WHAT”?

What might this mean for the Beauty & Personal Care sector?

Across product sectors, today's consumers are becoming increasingly used to getting what they want. In the world of beauty there is a complex 'Rubik's cube' of factors to be included in a consumer's product choice, including genetics, skin type, style preference, allergies, price, brand and so on. Beauty brands are embracing individuality, whether by multiplying the number of SKUs in their product lines to take account of idiosyncratic variations, or by experimenting with the new world of data and algorithm driven personalisation.

It is important to note that the personalisation trend is diametrically opposed to another we see: the economically-driven need for portfolio simplification and so there are other ways that the industry is leveraging data and technology, for example, to offer makeup simulators and “virtual mirror” solutions, to communicate with consumers via immersive technologies such as AI-chat, VR/AR and the metaverse.

## WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are leveraging new technologies



Japan's Kosé Corporation has unveiled a mixed reality makeup simulator. [The Colour Machine](#) uses high-speed projection mapping and colour correction to apply virtual eyeshadow and lipstick to the user's face, adjusting to facial movement and the person's skin tone



“[May](#)” is Maybelline's new avatar-based brand ambassador, being involved in the release of virtual products and services, metaverse-related activations, and campaigns alongside real-life avatar Gigi Hadid

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# SUSTAINABLE BEAUTY

## THE WHAT?

### What trends drive sustainability?

Macro Forces:  
**ENVIRONMENTAL  
EMERGENCIES**

Trends:  
**CLIMATE ANTAGONISM  
CONSCIENTIOUS HEALTH**

Climate change has become a visceral reality, with the past year seeing the largest number of climate-related disasters in recorded history. But there is rampant debate about who is responsible for climate change and how to address it: some consumers are changing how they make purchasing decisions according to their environmental impact, while others (particularly Gen Z) are putting the responsibility squarely on the shoulders of government, systems and corporations.

## 28 July

Earth Overshoot Day in 2022: the date by which demand for natural resources had exhausted what the Earth can regenerate

## 80%

feel that we are heading for environmental disaster unless we change our habits quickly

## THE “SO WHAT”?

### What might this mean for the Beauty & Personal Care sector?

As a result of social pressures the beauty industry is under the spotlight, both to create products with as low an environmental footprint as possible (in terms of ingredients, packaging, production and distribution cycles) but also to promote less environmentally demanding usage patterns amongst consumers. Efforts to reduce the environmental impact can take many forms, including refillable containers, facilitating recycling of beauty packaging, naked (i.e., packaging free) beauty, water-aware cosmetics and vegan/cruelty-free cosmetics, and others.

**Can beauty brands address sustainability from a position of genuine social responsibility rather than as a marketing tactic?**

**Can beauty sustainability involve all areas of the business as well as product/packaging?**

## WHO IS ALREADY ACTING ON THIS?

Marketplace innovations are attempting to embed sustainability in their offerings



Let's Go Green with MIRROR is a campaign released by health and beauty retailer, Watsons in partnership with boy band MIRROR to encourage customers across Hong Kong, Malaysia, Taiwan, and Singapore to make greener choices.

During the campaign launch, MIRROR performed their song Go Green, launched for the campaign, and shared the green actions they have taken in their daily lives.

# Every crisis can be an opportunity to improve your organisation, and people's lives

## We can help you leverage the trends:

Beyond this public report, get in touch with the The Global Trends and Foresight Team to discuss:

- **In-depth analysis** of the trends or a specific market's attitudes – and how they will change
- **A custom presentation** tailored with data & signals for your organisation and key countries
- **Workshops & activations** to apply the trends to your strategic planning processes
- **Data access** through your Ipsos team, or directly via our Portal for up to 50 markets
- **Macro Forces** with supporting data, to feed into your own foresight processes
- **Market-specific highlights** to inform your global footprint and strategy

## We can help you shape the future:

Beyond the trends, our advisory services in trends and foresight consulting include:

- **'Future of...'** foresight consulting to prepare for the obstacles and opportunities ahead
- **Trend Tracking** to monitor trend evolution and scale
- **Custom trends frameworks**, inspired by Ipsos Global Trends but customised for your organisation
- **Scenario building** and horizon scanning to consult with your organisation on preparation
- **Innovation sprints** to turn the trends into platforms for growth and to develop concepts



## About Ipsos

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide a True Understanding of Society, Markets and People. To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do. So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: You act better when you are sure.

# GLOBAL TRENDS 2023

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GAME CHANGERS

