

**Ideas made
possible.**



The future of beauty.

A trend and insight report.

November 2025.



The beauty industry is *evolving*. What opportunities lie ahead for brands at the cutting edge?

Beauty is entering a new chapter — one defined by intuition, innovation, and identity. As the boundaries between health, technology, and self-care dissolve, the category is expanding beyond the surface to embrace the full spectrum of human experience.

Consumers are seeking products that think like skin, act like science, and feel like belonging. The new frontier of beauty is sensorial and smart, merging biology with biotechnology, routine with ritual, and youth with longevity.

We see a generation exploring digital dreamscapes and hyper-real aesthetics; another embracing the rhythms of their bodies as a source of strength and wisdom. Beauty today is not about transformation, it's about attunement: to the body, to emotion, and to the world in flux around us.

This report explores the signals shaping that evolution; from the science of self to the rise of emotional design, and how brands can craft experiences that reflect a more fluid, connected, and conscious vision of beauty.

\$670 billion.

Projected global revenue of
the beauty & personal care
industries in 2025...

...And it's growing steadily, with an
expected 3.37% increase each year
for the next five years.

STATISTA

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PART ONE

Next-gen
innovation.



The ‘*skinification*’ of hair.

Looking at the rise of the "skinification" trend, where haircare products adopt skincare ingredients and routines, reflecting a shift toward more holistic and ingredient-focused hair treatments.

“*Skinification*’ is about borrowing the science of skincare to transform how we treat our hair.”

JEN ATKIN
CELEBRITY HAIRSTYLIST AND FOUNDER OF OUAI



skinification

/skinifi'keɪʃən/ [noun]

(English) (1) The shift toward treating hair, especially the scalp, with the same care, ingredients, and rituals used in skincare.

Happy scalp, happy hair.



Haircare is undergoing a shift, moving beyond surface-level fixes like frizz control or shine to embrace a more holistic approach rooted in scalp health. With hair loss alone generating around **4,500 monthly searches**, the need for solutions that address the root cause of concerns is growing rapidly.

The skinification of hair reframes the category through the language of skincare, positioning the scalp as skin that requires the **same level of care and protection as the face**. Once overlooked, it is now recognised as the foundation of healthy growth — yet one that is easily compromised by pollution, product build-up, and harsh cleansing routines.

This evolution has brought skincare-inspired formats and actives into haircare, from exfoliating scrubs and hydrating serums to barrier-repairing ingredients like niacinamide, salicylic acid, and hyaluronic acid. Consumers, particularly ingredient-savvy Gen Z and Millennials, are adopting these products as **part of wider wellness rituals**, seeking lasting scalp and strand health rather than quick fixes.

Fuelled by the accessibility and influence of social platforms like **TikTok**, scalp care is being propelled into the mainstream as a premium, wellness-led category — **blending science, self-care, and efficacy into one of beauty’s fastest-growing movements**.

“Think of your scalp as you do your skin... healthy hair grows from a balanced scalp.”

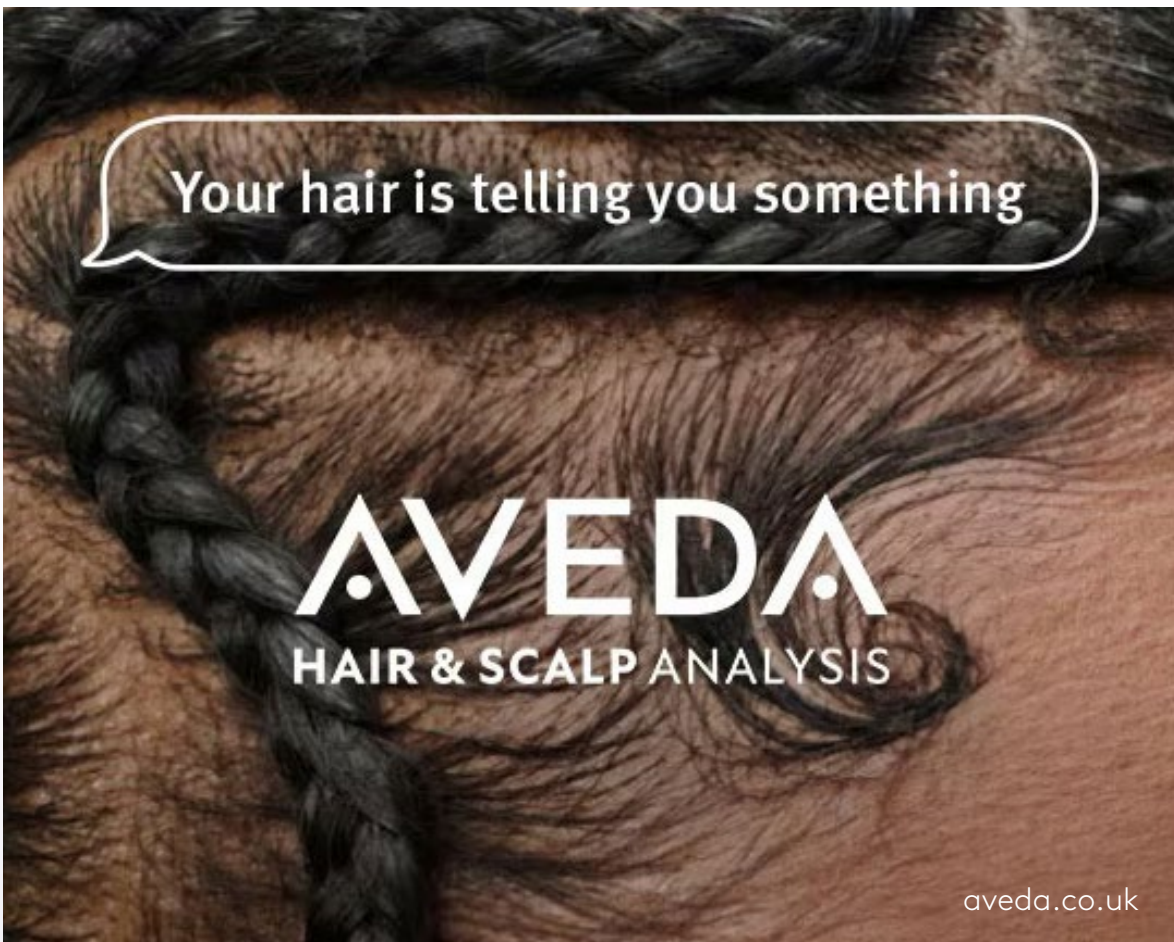
RICARDO VILA, HARRODS TRICHOLOGIST



Beyond the surface.

Skincare expertise is flowing into haircare, with brands like **Augustinus Bader** and **The Ordinary** expanding into scalp-focused solutions that harness popular actives such as niacinamide, collagen, and glycolic acid. At the same time, emerging players like **Act+Acre** and **Rhute** are building their ethos around advanced scalp treatments powered by peptides and stem cells.

Together, these innovators are reframing scalp health as the foundation of hair vitality, shifting the category **away from cosmetic quick-fixes** towards science-led, wellness-driven care that prioritises long-term results.



As with skincare, scalp and hair health is a deeply personal journey that requires education and tailored routines. Consumers not only need to understand which active ingredients fit their needs, but also the unique qualities of their hair and scalp.

This demand has sparked the growth of diagnostic services, from AI-led platforms like **Revieve's** selfie-based advisor to in-store personalised analysis experiences such as **Aveda's** Hair & Scalp Check.

By offering insights into scalp condition, porosity, and elasticity, these services **empower consumers to make informed product choices and build personalised care rituals**, embedding scalp health firmly within the wider beauty and wellness landscape.



Home hair rituals.



arkiveheadcare.com

Building on the holistic approach to scalp and hair health, consumers are increasingly seeking to **elevate basic routines into wellness-led, at-home experiences**. Termed “hair therapy,” this trend transforms daily haircare into mindful rituals, blending performance with self-care. Social media highlights this shift, with topics like **#ScalpFacials** reaching over 30M views, reflecting strong demand for sensory, spa-like experiences at home.



ardororganics.com.au, Japanese head spa

Inspired by Japanese head spas, consumers want treatments that combine exfoliation, massage, hydration, and targeted actives in accessible formats. Brands like **Arkive**, who coined “Headcare,” are meeting this need with curated wellness sets that let users replicate spa rituals at home, **turning scalp and hair care into a deliberate, restorative ritual** rather than a functional chore.



solarislabny.com



The *texture* gap.



“65% of the world's consumer population and over half of American adults do not have straight hair.”

HAIRCARE TREND REPORT 2025 - THE LABS

The future of haircare cannot be truly inclusive without embracing texture. With **65% of the world’s hair not straight**, the so-called “texture gap” has long left curly, coily, and wavy hair underserved, both in salons and on shelves. Now, a new wave of brands is beginning to celebrate textured hair not as a challenge to manage, but as something to nurture. **Pattern**, for example, has redefined ritual with innovations like its Hair Steamer, designed to help textured strands drink in hydration and unlock the full benefits of treatments. At the same time, platforms like **Carra Labs** are blending science and AI to personalise routines, recognising that **every curl pattern deserves its own care**.

But it isn’t only about products — it’s about education and experience. Texture education remains patchy in professional training, often **leaving consumers to self-navigate**. In response, brands and cultural players are stepping in: from **Gymshark’s** Twists & Sets pop-up, which spotlighted protective hairstyles in the context of fitness, to salon and editorial initiatives re-centering textured hair at the heart of beauty. Together, these moves signal a much-needed shift — one where **textured hair is celebrated, understood, and supported** with the same depth of care and creativity as any other hair type.



Gendered haircare.

“71% of men who use hair products prefer those specifically designed for them, rising to 80% among men aged 16–34”

VOGUE BUSINESS



As skinification reshapes haircare, men are emerging as a major driver. Hair loss is a top concern, with men representing around 60% of the global hair loss treatment market and over half in the UK affected. Yet despite high demand, **men are dissatisfied with non-prescription products**, frustrated by confusion and lack of efficacy. Their strong preference for male-specific branding — 71% buy products designed for men — further highlights a gap in the market.

This gender gap points to a clear opportunity. While online players like Hims and Keeps offer clinical solutions, few mainstream or in-store brands speak directly to men in a more lifestyle-led, approachable way. **THIX** shows how active ingredients can be marketed with style and clarity, **making scalp care feel aspirational rather than medical**. Brands that bridge this gap with simplified routines, clear claims, and male-focused messaging can position scalp health as a credible, wellness-led category addressing one of men’s most pressing concerns.



thixhair.com

Innovation toolkit.



No one size fits all!

Haircare is evolving, but inclusion remains a critical gap, leaving too many consumers feeling underserved. True innovation lies in recognising this diversity — creating products, services, and experiences that celebrate all hair types and concerns. For brands, inclusion is about reframing haircare as a space where every individual sees their needs catered to.



Actives made simple.

Education is key when it comes to active ingredients. By spotlighting familiar actives like niacinamide, peptides, and hyaluronic acid — and clearly linking them to scalp and strand benefits — brands can build trust, educate consumers, and elevate routines from cosmetic fixes to long-term hair health.



Generic genetic.

As consumers seek tailored solutions, hair/scalp analysis services are set to transform haircare. Tools like scalp scans and AI diagnostics empower shoppers to understand their unique needs and match them with targeted products. For brands, investing in accessible diagnostics and personalised recommendations will drive trust, loyalty, and a sense of bespoke care.



Home rituals.

Consumers are embracing haircare as part of their wellness rituals. By curating products that encourage relaxation — from scalp treatments to sensory sets — brands can transform functional routines into holistic, self-care rituals. This shift positions haircare not just as beauty, but as a restorative experience that brands can help curate.

Tween skincare.

The world of skincare can be overwhelming, especially when trying to find the right products for your unique needs. There’s a growing demand for tailored solutions that cater to different skin types, ages, and demographics, ensuring that skincare is accessible and effective for everyone.

“Around 1 in 4 UK children (aged 9-12) are using skincare products with *potent actives* like Retinol or AHAs.”

PAI SKINCARE - TWEEN STUDY



Opportunity.

This statistic reveals a market gap driven by a disconnect between product marketing and young skin's needs. Brands should lead the way with education, transparency, and formulations specifically tailored for tween and teen skin.

Tween advocates.



“55% of tweens say that they don’t check the product labels before purchase.”

PAI SKINCARE - TWEEN STUDY

Skincare often marks one of the first steps into self-care and maturity, making it essential for brands to offer gentle, age-appropriate formulas that help build simple, positive routines—tailored to young skin at a critical stage of development.

indu, started by teens for teens, was created as a relatable and healthy entry point into skincare. With a focus on enjoyment and safety, the brand addresses the risks of using harsh products too early and fills a gap in teen representation. A teen advisory board helps guide everything from product development to campaigns, ensuring real input and authentic representation.



Also leading the way is **Spot & Stripes**, a brand dedicated to skincare education. Their range spans skincare, hair, and body for both boys and girls, all formulated with 100% natural actives. Their mission is to help teens build healthy habits and long-term confidence, from childhood through to adulthood.

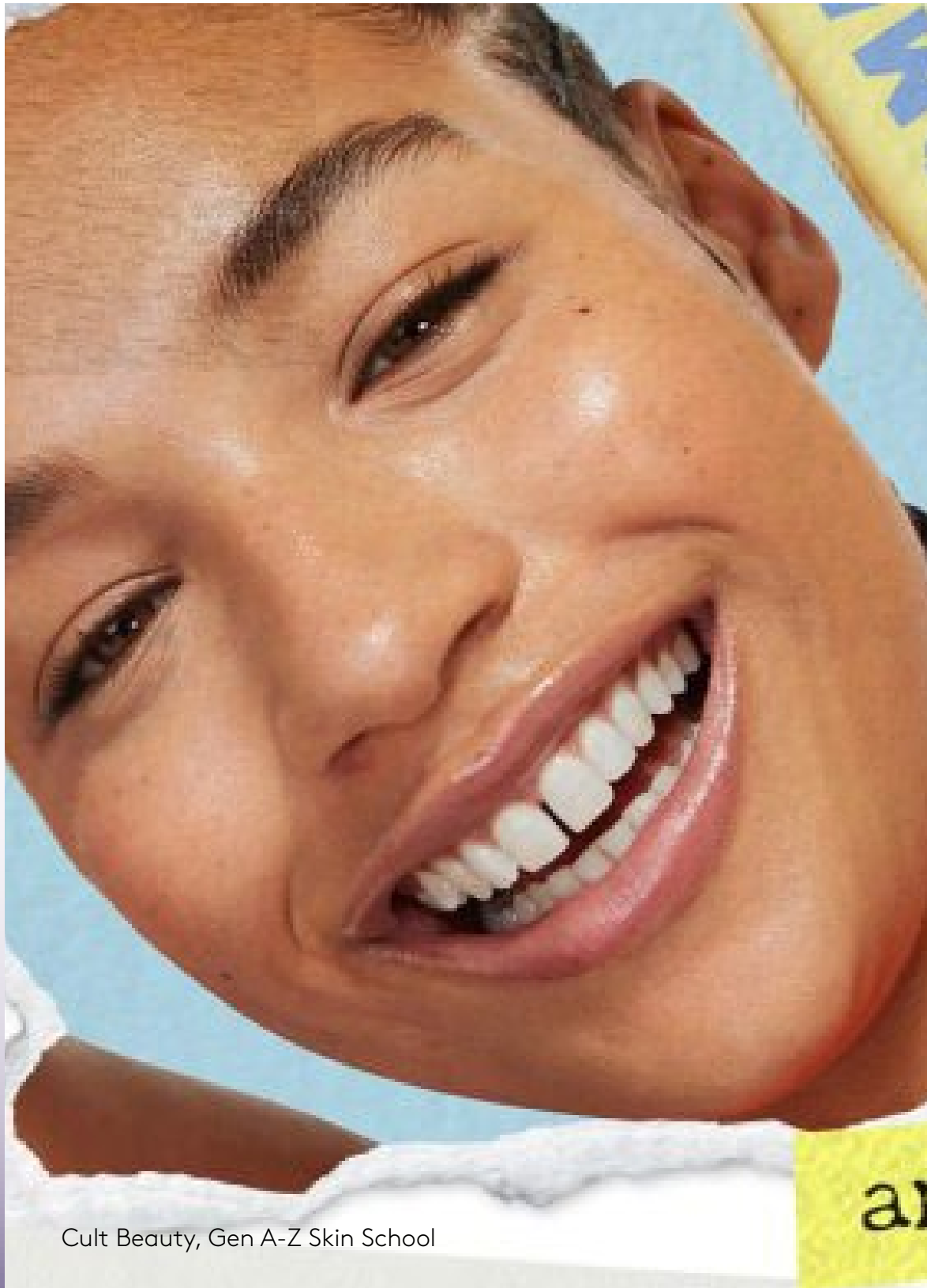
Sincerely Yours, was founded to help the next generation feel confident in their skin. Along with top dermatologists and cosmetic chemists, they create clean, gentle, and effective skincare that teens are proud to use, and parents trust. A portion of every sale supports Girls Inc., empowering more teens to grow up strong, smart, and bold.



Empowering proto-skintellectuals.

With skincare marketing everywhere, from TikTok to YouTube, it’s crucial to educate younger generations on making informed product choices. While Gen Z is already passionate about skincare, brands must also focus on Gen Alpha to provide clear, trustworthy guidance amid overwhelming information.

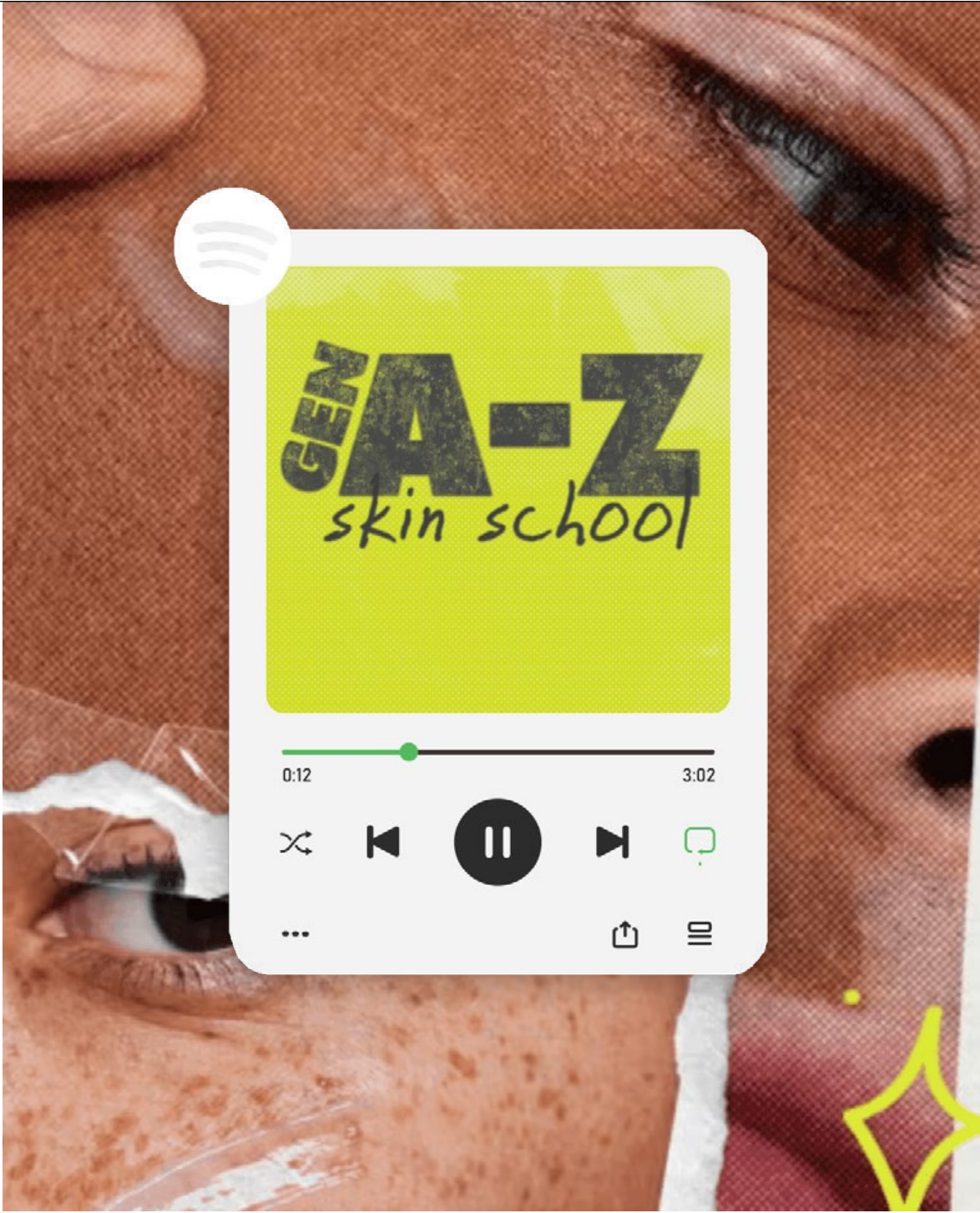
Cult Beauty’s Gen A–Z Skin School is a smart, bite-sized resource that breaks down skincare jargon for tweens and teens. By also addressing the impact of social media on mental health, the platform builds trust and lasting brand loyalty with young shoppers.



Cult Beauty, Gen A-Z Skin School

“While Gen Z began experimenting with skincare at 13, Gen Alpha has eclipsed them by 5 years, starting at an average age of 8”

CULT BEAUTY, GEN A-Z SKIN SCHOOL



The Teenage Skincare Project by Dr Emma Clinics in Northern Ireland empowers young people through science-backed talks and workshops for schools, parents, and teens. Offering reliable, judgment-free information, it highlights the connection between skincare, mental health, and self-esteem.

“Skincare is about more than appearance—it’s about confidence. and how young people feel about themselves.”

DR EMMA CLINICS,
THE TEENAGE SKINCARE PROJECT

Innovation toolkit.



Simplified routines.

For young skin, simplicity is key. Overloading with actives can do more harm than good, so clear, easy-to-follow guidance is essential. By explaining what to use, when, and why, brands empower young users to make confident choices, discover what works, and build lasting trust — leading to stronger brand affinity and repeat purchases.



For teens, by teens.

It's essential for brands to authentically represent their audience. When consumers see themselves reflected in the visuals, messaging, and tone of a brand, they're more likely to feel seen, heard, and valued. By prioritising representation, brands can create more meaningful relationships with their audience and cultivate long-term loyalty.



Build confidence.

Choosing the right products for pre-teen skin can be overwhelming for both tweens and parents. Brands should offer clear educational tools to guide them, highlighting safe ingredients, simple routines, and how to address common skin concerns. By spotlighting education, brands can empower both tweens and parents to make confident, informed choices.



The shelfie.

For Gen Z and Gen Alpha, visual appeal matters as much as product quality. Thoughtful, aesthetic packaging aligned with their values and digital habits can turn skincare into shareable content—driving organic exposure and amplifying brand reach.

Skincare, levelled-up.

The world of skincare can be overwhelming, especially when trying to find the right products for your unique needs. There’s a growing demand for tailored solutions that cater to different skin types, ages, and demographics, and even contexts; ensuring that skincare is accessible and effective for everyone.

“We are at the dawn of a ‘new generation’ cosmetic that will use the skin’s microbiome to provide products with new performance.”

LUC AGUILAR

DIRECTOR OF CLINICAL AND BIOLOGICAL RESEARCH FOR L'ORÉAL R&I

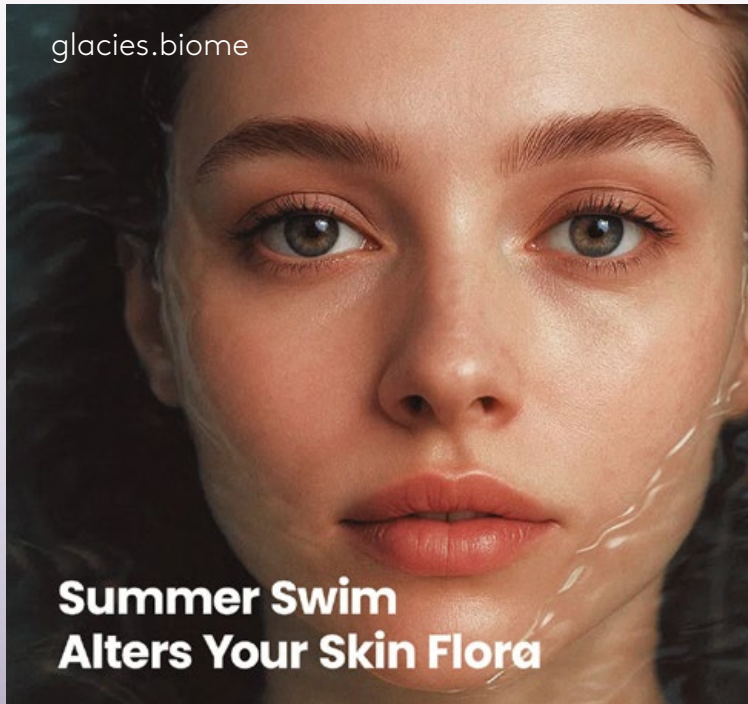


AI-powered skincare.



The skin’s microbiome plays a crucial role in everything from acne to aging, shaped by factors like diet, stress, and environment. As awareness grows, consumers are treating skin health like gut health by embracing probiotics, prebiotics, and postbiotics. In response, brands are rolling out microbiome-friendly products like gentle cleansers, probiotic mists, and inulin-infused moisturisers, with certifications like MyMicrobiome helping to validate their claims.

Now, the next wave is emerging: hyper-personalised, AI-powered skincare tailored to individual microbiomes. Leading the way is **Glacies Biome**, a Luxembourg-based biotech startup using AI to analyse individual microbiomes and create custom routines. Their research shows how travel, pollution, and even swimming can disrupt the skin’s balance — driving solutions like post-swim cleansers and barrier-repair serums.

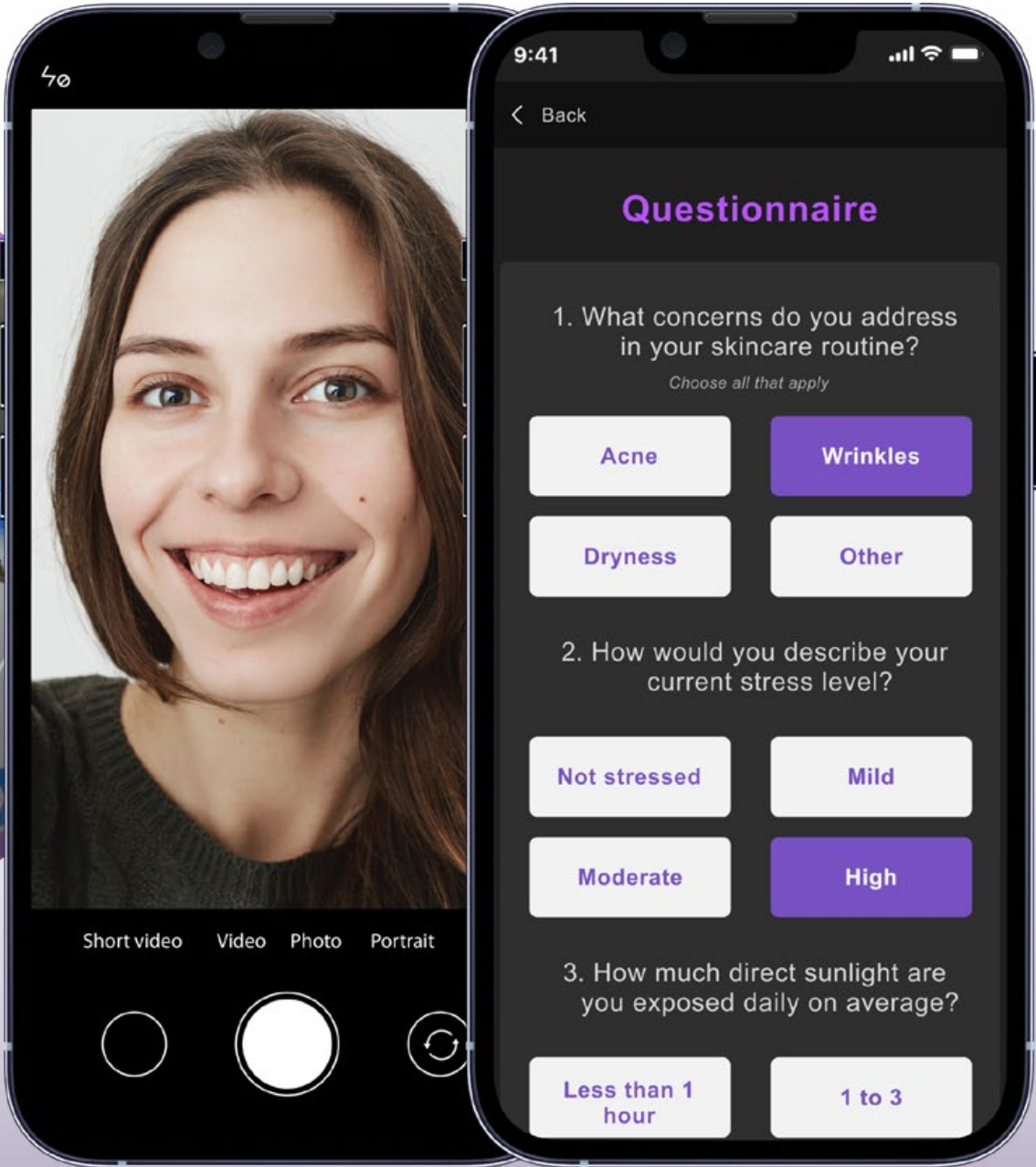


“The microbiome is a key player in skin health, so it’s *essential* to take care of it”

LUC AGUILAR,
DIRECTOR OF CLINICAL AND
BIOLOGICAL RESEARCH AT L'OREAL R&I



Praised by Tatler Asia and Vogue Scandinavia, this approach marks a lasting shift. As tech and biology converge, skincare is becoming more personal, adaptive, and in tune with the skin’s ever-changing needs.



glacies.biome

Beauty in *transit*.



With international travel reaching 690 million trips in early 2025, it's no surprise that travel has become a major driver of skincare innovation. From dry cabin air to urban pollution, today's travellers want products that protect, repair, and adapt—fueling demand for hydrating mists, overnight masks, and antioxidant-rich formulas with ingredients like matcha, niacinamide, and algae.

L'Oréal Travel Retail Asia Pacific is leading this shift with immersive shoppertainment lounges in major Asian airports. Highlights include the Skin Mist Pod for climate-specific hydration, the Facial Cocoon — a 10-minute luxury facial with Lancôme's Absolue Cryo Sculptor — and the Lifestyle and Grooming Bar, offering scalp analysis and fragrance-inspired mocktails.

“Travel creates one of the *harshest* environments for our skin”

DR. SHEREENE IDRIS, DERMATOLOGIST

“Travellers aren't just looking for products—they're seeking memories,” says Isabelle Lim, Director of Communications and Engagement. With nearly half of Gen Z travellers craving immersive experiences, the fusion of skincare, wellness, and lifestyle is shaping the future of beauty.



It starts *within*.



Beauty and wellness merge into a self-aware, holistic pursuit. Consumers seek root-cause solutions, pairing products with supplements, nutrition, technology, and preventative care. Modern beauty is no longer just cosmetic.

“Your skin is a reflection of your inner health; focus on the cause, not just the cover-up”

HEALTHLINE



Wellness hubs like **Sweat Lounge** and **Rebase Recovery** make beauty inseparable from health. Brands can no longer operate in isolation science, self-care, and innovation, from bio age testing to **Bryan Johnson’s** longevity pursuits, define the new standard.

Nutrition drives beauty from the inside out. Kourtney Kardashian’s **Lemme** supplements and **Your Tea** highlight how vitamins and functional nutrition elevate appearance, reflecting consumers’ focus on mindful, health-led choices over mindless consumption.

Neko Health’s £300 full-body scans provide doctor-led, actionable insights, putting preventative control of age and health within reach. Brands that integrate biohacking, supplements, and holistic wellness meet a generation that values conscious self-care and longevity.

The future of beauty starts at the core integrating wellness, nutrition, and preventative care into everyday life.

Innovation toolkit.



Scene-based beauty.

A rising trend in China’s skincare market is scenario-based skincare—products tailored to specific situations, environments, or moods. Especially popular with younger consumers, this approach reflects a shift toward skincare that fits into daily life and emotional needs, positioning it as a lifestyle companion, not just a routine.



Location, location.

Brands should tailor product experiences to the context, whether it’s an airport or a city mall, offering what consumers need in the moment, from quick travel solutions to immersive indulgence. By designing with the environment and consumer mindset in mind, brands can create more relevant and engaging interactions.



Leverage AI.

Brands can harness the power of AI to elevate their service offering by delivering bespoke, data-driven skincare recommendations tailored to each consumer’s unique needs. By analysing factors like skin type, lifestyle, environment, and even travel patterns, AI-powered tools can suggest the most relevant products—taking the guesswork out of skincare.



Be phygital.

Brands can bridge digital and physical retail by integrating tech like AI advisors and smart mirrors in-store, enabling personalised, real-time skin diagnostics. By bringing digital capabilities into physical spaces, brands can create seamless, tech-enhanced journeys that feel both cutting-edge and human-centric—blending precision with trust.

Female focus.

Brands are redefining women’s health, wellness, and beauty supporting cycles, menopause, and prevention, while helping women embrace their bodies with confidence, pride, and care that truly understands their needs.



Cyclical respect.



“Living in alignment with our cycle is the next frontier.”

DR. AVIVA ROMM

Cycle-focused beauty is turning monthly symptoms into moments of care. **Typology** transforms skincare into four-week rituals, while **_Faace** targets periods directly with specialized face masks. With over 250 million period-tracking apps downloaded, women are seeking personalized, tech-enabled solutions. **Flo Living** is leading the next wave of femtech, blending science, technology, and advocacy to redefine hormone care globally.

Muzha, **Blume**, and **Rael** are re-defining beauty by putting the menstrual cycle at the center of self-care. From **Muzha’s** ritualistic empowerment to **Blume’s** Cloud 9 Cramp Oil and **Rael’s** clean, accessible solutions, cycle-conscious beauty is now an essential part of daily wellness.



Women are starting to align their life, work, and wellness with their cycles, and couples particularly male partners are increasingly engaging to understand the menstrual rhythm, learning how to support, plan dates, or even time meals around it. The cycle is shaping lifestyle, relationships, and culture.

Menopause care.

Menopause isn't a side note it's a takeover. Lasting 4–10 years, it's a seismic shift for every woman, and the beauty industry is finally paying attention. What was once whispered about is now a catalyst for innovation, inspiring founders to tackle the long-ignored gap in women's health.

“Menopause is a natural transition that calls for mindfulness, self-care, and gentle attention to your body’s changing needs.”

DR. CHRISTIANE NORTHRUP

Stripes, founded in 2022 by Naomi Watts, leads the charge with science-backed skincare and wellness products that don't mask menopause they fight it. Lume combines clinical insight with holistic care, offering personalized coaching and evaluation across eight pillars of vitality. **Menopoised** brings ancient Chinese wisdom to modern wellness with magnetic therapy that keeps women cool, calm, and balanced.

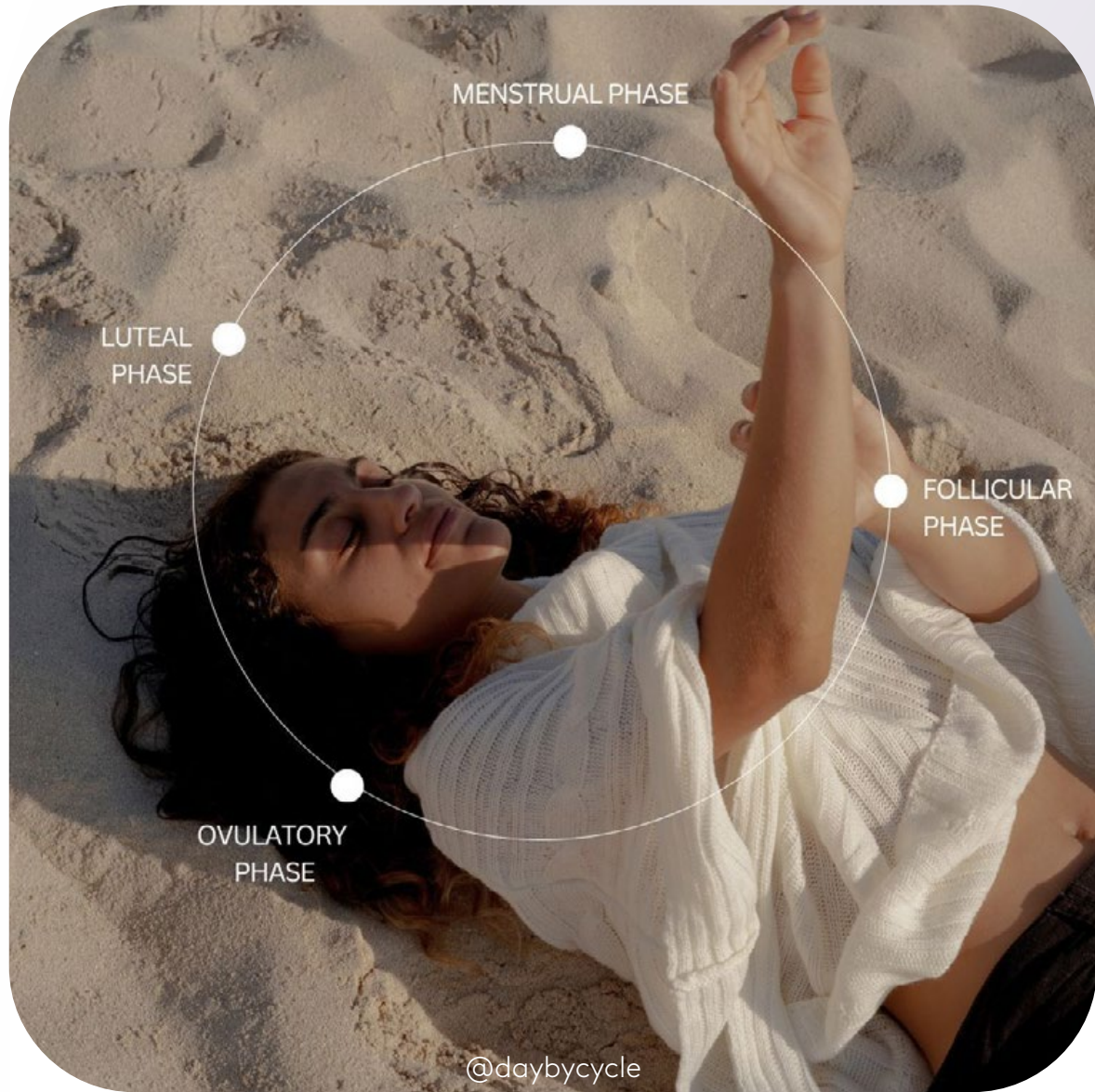
Supplements and skincare brands are stepping up too. **Wile** supports mood and hormonal balance with plant-based formulas. **Kindra** delivers hormone-free essentials that normalize menopause and empower women. **Pause Well-Aging** offers clinically proven skincare that celebrates aging instead of fighting it. Together, these brands show that menopause is no longer silent it's a powerful sector in beauty and wellness.



Naomi Watts, Stripes



Innovation toolkit.



Cycle orientated.

Brands can host cycle-focused events and pop-ups that unite women in the same phase, showcasing tailored products. **Strategic 'shop by cycle phase' product placement, community-building, and women's health education.** This can also be paired with beauty experiences under concepts of emotional wellbeing or date-nights.



Curate lifestyles

Creating spaces where beauty habits **seamlessly merge into attainable lifestyle choices** empowering the city girl to live holistically and effortlessly. Thoughtful, **lifestyle-led moments and pop-ups inspire wellness**, self-expression, and balance, showing her that her ideal, elevated lifestyle is beautifully within reach.



Soften biohacking.

Champion prevention and holistic wellbeing for women. Once the domain of tech-bros and science nerds, biohacking has the potential to unlock the much misunderstood feminine health and wellbeing sector. By pivoting the image of biohacking and making it more accessible, women can take back control of their own health outcomes and place pressure on their healthcare providers for action.



Foster ownership.

Empower women to invest with intention. Offer clarity, purpose, and intelligent marketing that respects her choices. Inspire engagement through fulfilment, not consumption **supporting her independence with self-love workshops** and meaningful experiences that honour her autonomy in beauty, health, and personal growth.

PART TWO

What's trending?



Y3K? *Okay!*

We're in a time where the pressure to present a perfect image is stronger than ever, yet the reality often tells a different story. In response, there's a growing desire to break free from societal norms and reclaim self-expression and identity on our own terms.

“Y3K has shown up as an aesthetic trend in fashion, art and design, characterised by metallics, neon lights and *sleek* minimalist visuals.”

ERICA NG
STYLUS

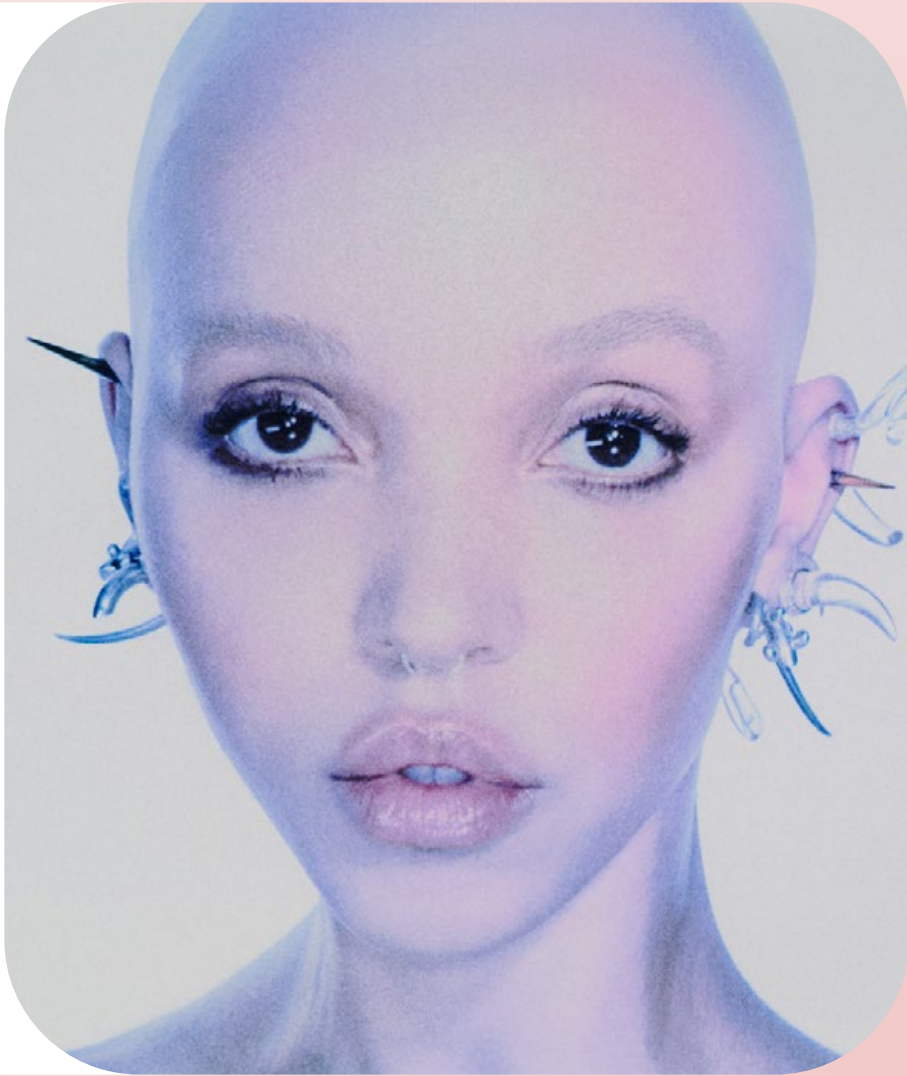


Nike x XG collab: Air Max Dn



Major players.

FKA Twigs.



Chisa.



Hungry.



Grimes.



Ines Alpha.



Rowisingh.



As the Y2K revival begins to fade, the spotlight is shifting forward, far forward, to the year 3000. Enter **Y3K**, a futuristic, space-age aesthetic that blends high-tech fantasy with bold self-expression. Originating from East Asian style hubs like Japan, China, and Korea, this trend merges the digital and physical worlds, reflecting how deeply technology now shapes our identities. Whilst Y2K leaned into nostalgia, Y3K breaks away from idealised aesthetics, embracing imperfection as a form of freedom.

With social media, video filters, AI, and virtual reality woven into daily life, it's no surprise that our physical appearance is starting to echo these digital influences. Y3K beauty and fashion embraces hyper-glossy finishes, holographic textures, and avatar-inspired styling, creating a look that feels both otherworldly and oddly familiar.

At the forefront of this movement are artists like **FKA Twigs, Grimes, Chisa from XG, and Ines Alpha, Hungry and Rowisingh**; whose visual identities blur the lines between human and digital, real and surreal. Their looks challenge traditional beauty norms, dissolving gender, bending reality, and leaning fully into fantasy.

Brands to watch.



Many beauty brands are embracing the Y3K movement, bringing it to life through bold, innovative, and tech-forward experiences.

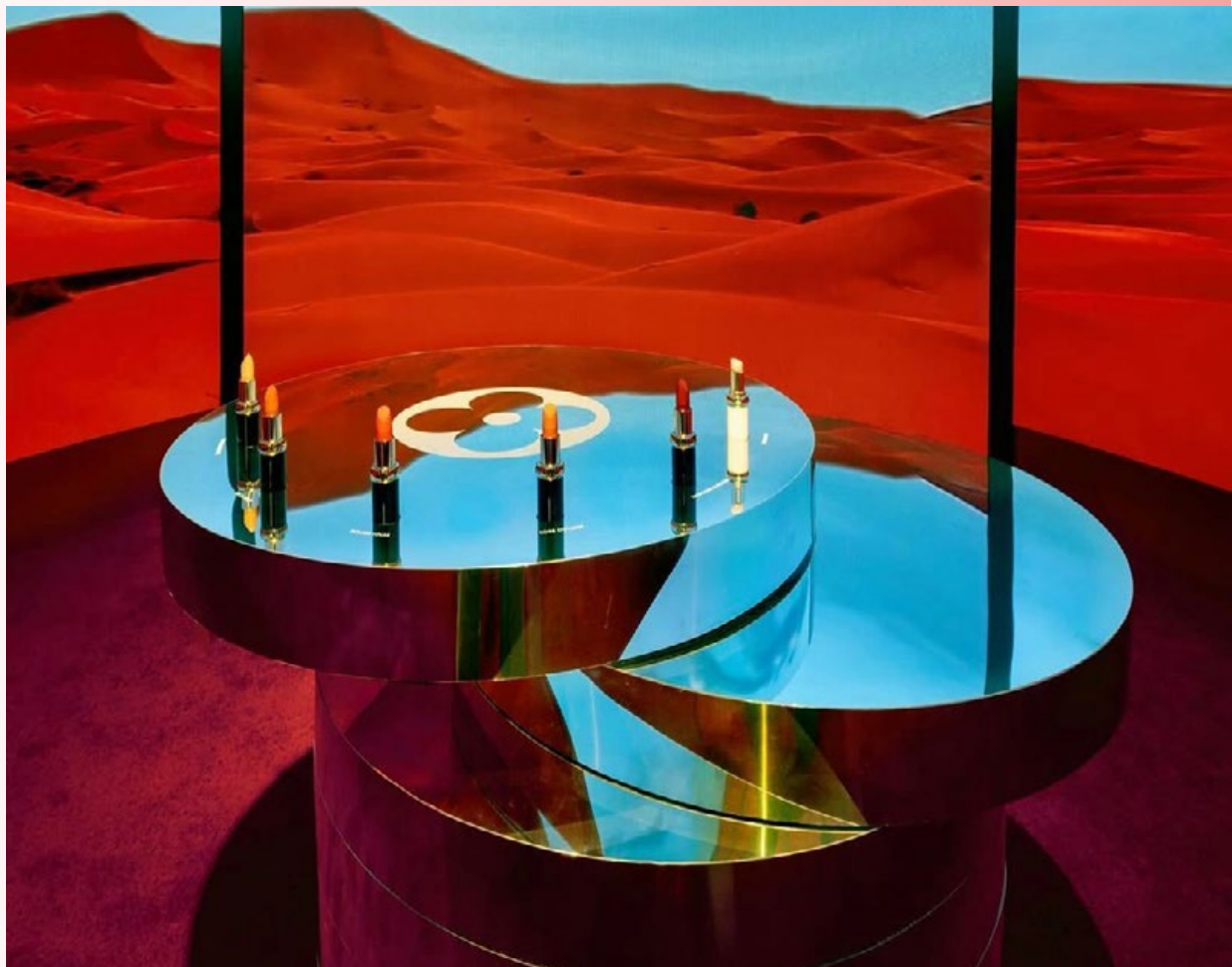
Isamaya Beauty is a standout example, with a strong, unmistakable identity that’s bold, futuristic, and unapologetically artistic. Designed for those who want to express themselves in ways that are a little wild, a little weird, and entirely original, the brand blurs the line between beauty and sculpture. Products feature chrome finishes, high-gloss textures, and hardware-inspired packaging, turning makeup into wearable art.



Risky Beauty also leans into a future-forward vision, but with a raw, rebellious twist. The brand challenges conventional beauty standards through an unfiltered aesthetic that celebrates imperfection, attitude, and individuality. Its product lineup strikes a balance between experimental, fashion-driven looks and accessible, everyday wear; speaking to a new generation that values creative freedom over perfection.

Then there’s **R.E.M. Beauty**, which captures a softer, dreamier take on futurism. Inspired by the REM stage of sleep, when imagination is at its peak, the brand is rooted in self-expression, fantasy, and making your beauty dreams feel real. With sleek, sci-fi-inspired packaging and ethereal textures, it channels the playful, surreal side of the Y3K universe.

La Beaute — Louis Vitton pop-up.



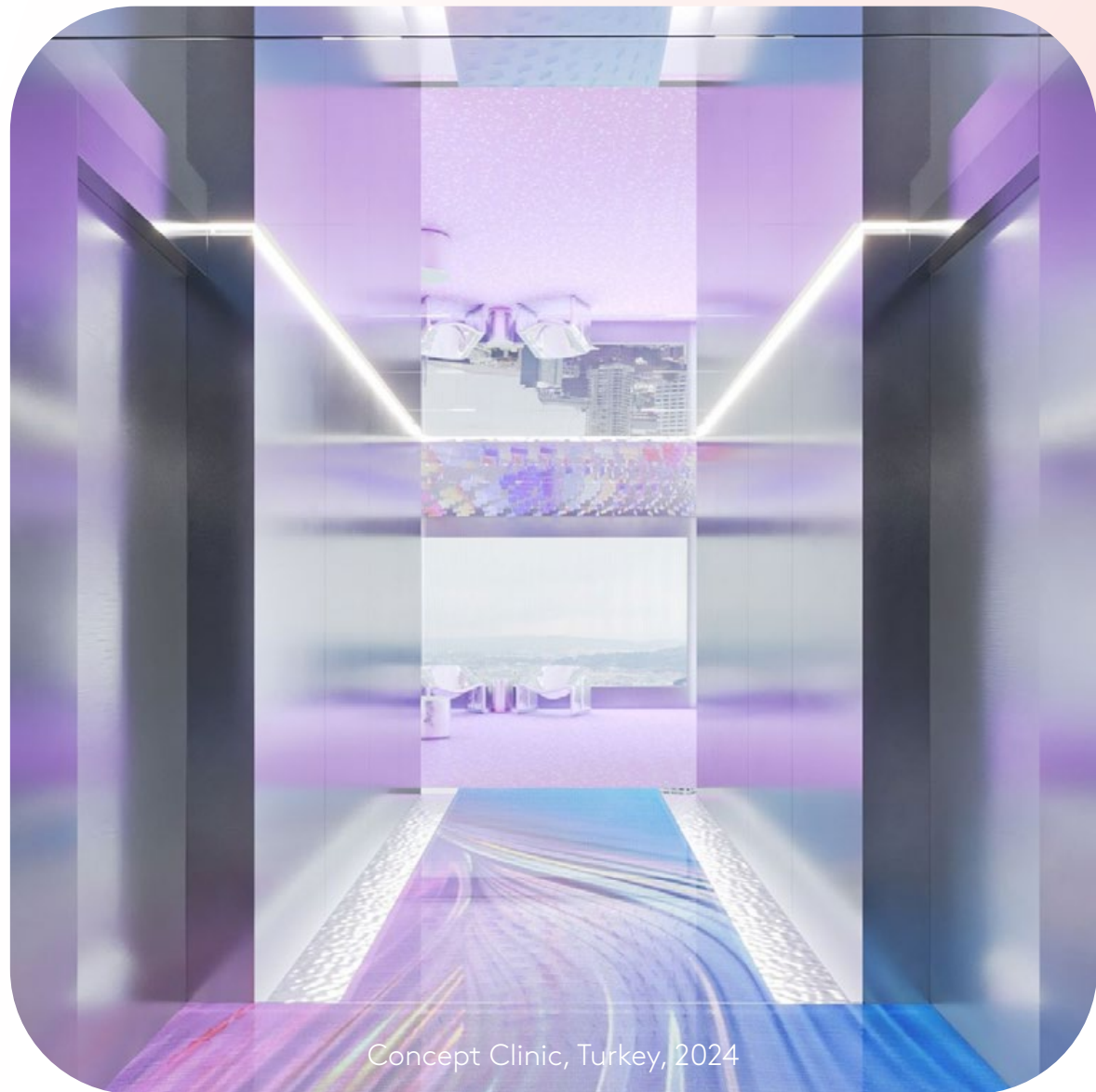
“A debut beauty collection that transforms makeup into a lifestyle and retail into theatre.”

SHOPDROPDAILY

A standout example of sci-fi fantasy brought to life in a physical space is Louis Vuitton’s La Beauté pop-up. Curated by legendary makeup artist Dame Pat McGrath, the experience marks the launch of the house’s first-ever cosmetics collection.

The design embraces a **space-age meets luxury-tech aesthetic**. Chrome orbs, glossy red surfaces, and integrated lighting transform the space into a sleek, almost utopian environment. The space incorporates interactive features like a virtual try-on booth, movement-responsive lighting, and private consultations turning beauty exploration into an immersive, almost otherworldly experience.

Trend toolkit.



Concept Clinic, Turkey, 2024

Space age.

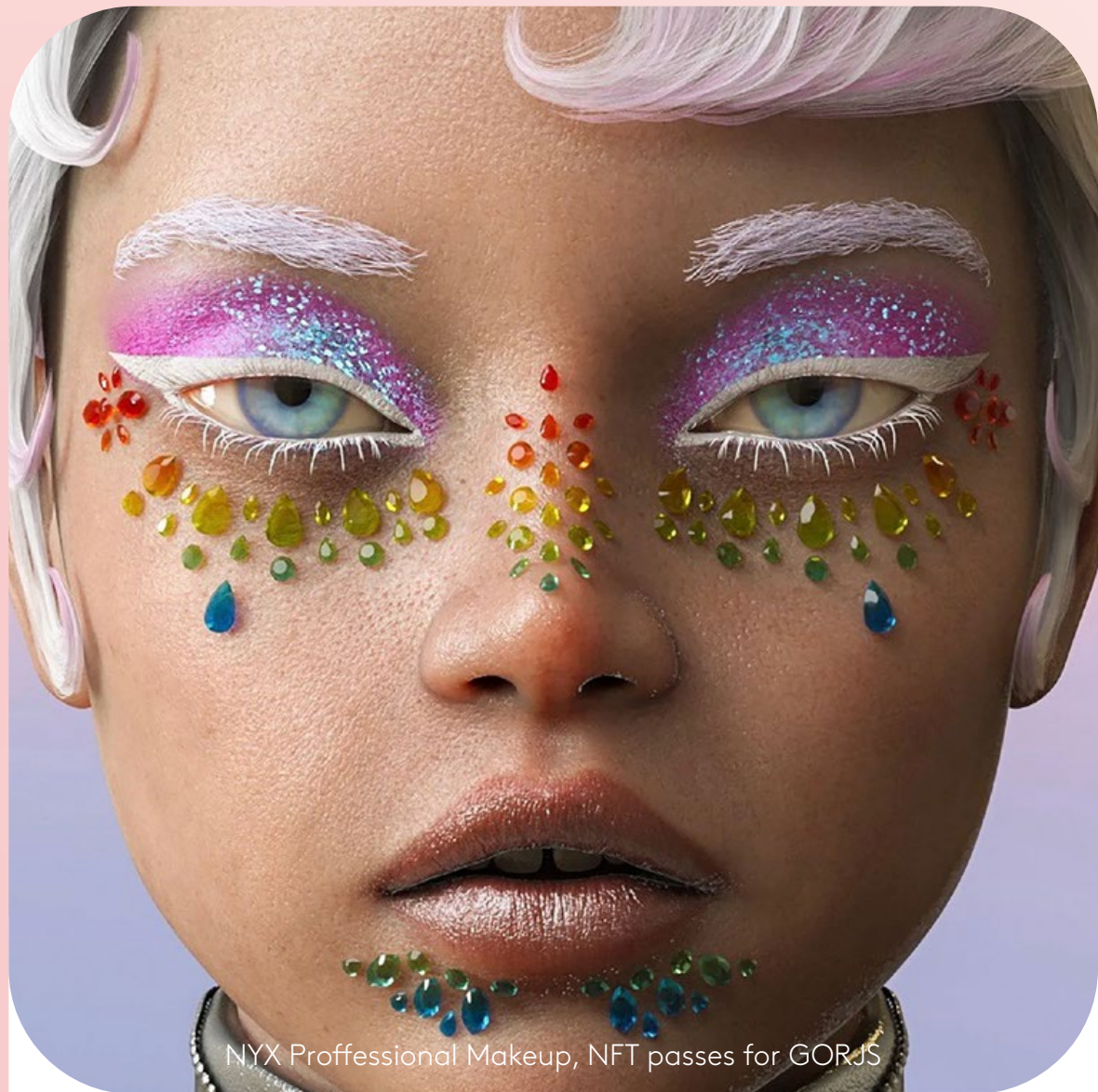
Embrace a sci-fi, futuristic aesthetic that offers a glimpse into the world of tomorrow. Sleek, high-gloss surfaces, metallic finishes, and fluid, undulating forms can be used throughout interior design and campaign visuals to product packaging. These elements create an immersive, otherworldly atmosphere that feels advanced yet aspirational.



@lalalalisa_m

Blurred identities.

Step into a world where self-expression transcends traditional boundaries — beyond the binaries of 'man' or 'woman', and even past the limits of what's considered 'real' or 'natural'. In this space, identity is fluid, multifaceted, and ever-evolving. This approach empowers customers to express not just one side of who they are, but the full spectrum of who they could become.



NYX Professional Makeup, NFT passes for GORdS

Beauty-verse.

As Y3K aesthetics continue to blur the boundaries between digital and physical worlds, brands have the opportunity to fully embrace 'The Beauty-Verse' — a hybrid space where technology, self-expression, and immersive beauty experiences collide. By integrating AI and virtual reality into real-life environments, the customer experience becomes layered, dynamic, and deeply personal.



AMO, Aviapark

Edit self, edit space.

The Y3K community isn't seeking perfection, they're drawn to brands and spaces that let them explore and shape their identities. It's about fluidity and self-expression, not just for individuals but for brands too. The most resonant brands create adaptable spaces that reflect their audience's evolving moods while staying true to their core identity.

Acceptance *revolution.*

This chapter explores the new “faces” of beauty, showing how representation is expanding and wellness, performance, and lived experience are reshaping the industry.

Flat age era.

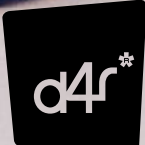


REFY’s “Iconic Never Gets Old” lipstick campaign celebrates “the women we aspire to be” by showcasing prints of women across generations in their pop-up REFY paper shop, Paris. By highlighting beauty that transcends age, the campaign positions lipstick as both an expression of identity and empowerment, turning flat aging into a statement of timeless confidence.

Sonsie Skin, co-founded by Pamela Anderson in 2023, champions authenticity and self-love, with Pamela herself regularly appearing makeup-free. By rejecting traditional anti-aging ideals, the brand positions itself as truly demographicless, embodying the flat-aging concept. Its philosophy frames beauty not as something to achieve, but “to come home to,” linking it intrinsically to embracing yourself at any age a message that resonates across audiences.

“A skincare lifestyle with a philosophy to halt the exhausting and perpetual chase of beauty”

D4R



The beautiful game(s).



“The WNBA and Glossier are leading the conversation around the intersection of beauty and sports”

EMILY TRILLAUD
VICE PRESIDENT OF PRODUCT, GLOSSIER

The rising visibility of women’s sports is creating new opportunities for beauty brands to assert cultural relevance. The fusion of athletic performance and makeup produces powerful imagery, amplifying both athlete empowerment and the cultural impact of events. In 2024, UK **women’s sports viewership hit 45.2 million**, with **sponsorship awareness at 28.9 million** adults. Partnerships like **Charlotte Tilbury** with **F1 Academy’s Lola Lovinfosse**, **E.L.F’s NWSL sponsorship**, and **Glossier’s WNBA collaboration**



Lola Lovinfosse, Charlotte Tilbury, F1 Academy

extend beyond marketing, using grassroots activations and pop-up sports initiatives to connect with communities. These efforts promote women’s health education and encourage young girls to play basketball and stay in sports despite societal pressures, showing that femininity, endurance, and empowerment can coexist.

Non-invasive beauty.



Beauty Works Galore , Microcurrent

Beauty and wellness are merging, with consumers favoring subtle, **non-invasive interventions over extremes**. Status is now defined by self-awareness, smart consumption, and treatments that are effective, safe, and data-driven.

Non-invasive options like **Salmon Sperm injections and PRP therapy (vampire facials)** are growing in popularity, targeting root causes of ageing texture changes, volume loss, and facial shape while stimulating collagen and restoring elasticity. The UK market mirrors this shift, **valued at £1.85 billion in 2023 and projected to reach £5.1 billion by 2030**, positioning these treatments as a **“necessary luxury”** and practical daily tools for health and radiance.

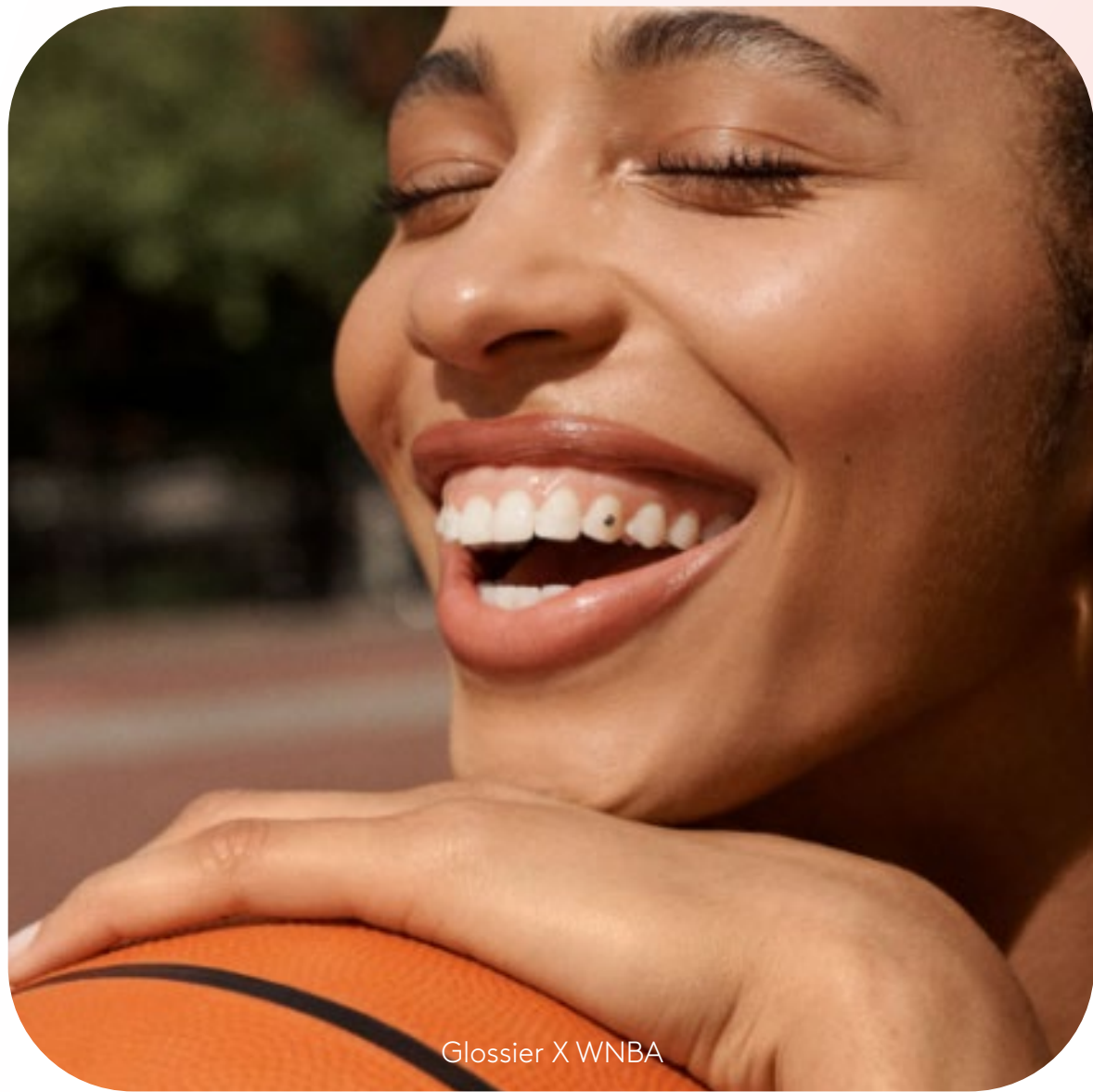
Accessibility and affordability are breaking down stigmas and broadening the consumer base. Innovation, research, and investment are driving even more refined solutions, integrating non-invasive beauty seamlessly into wellness routines and delivering natural, long-lasting results.



Neutrogena's Light Therapy Acne Mask



Trend toolkit.



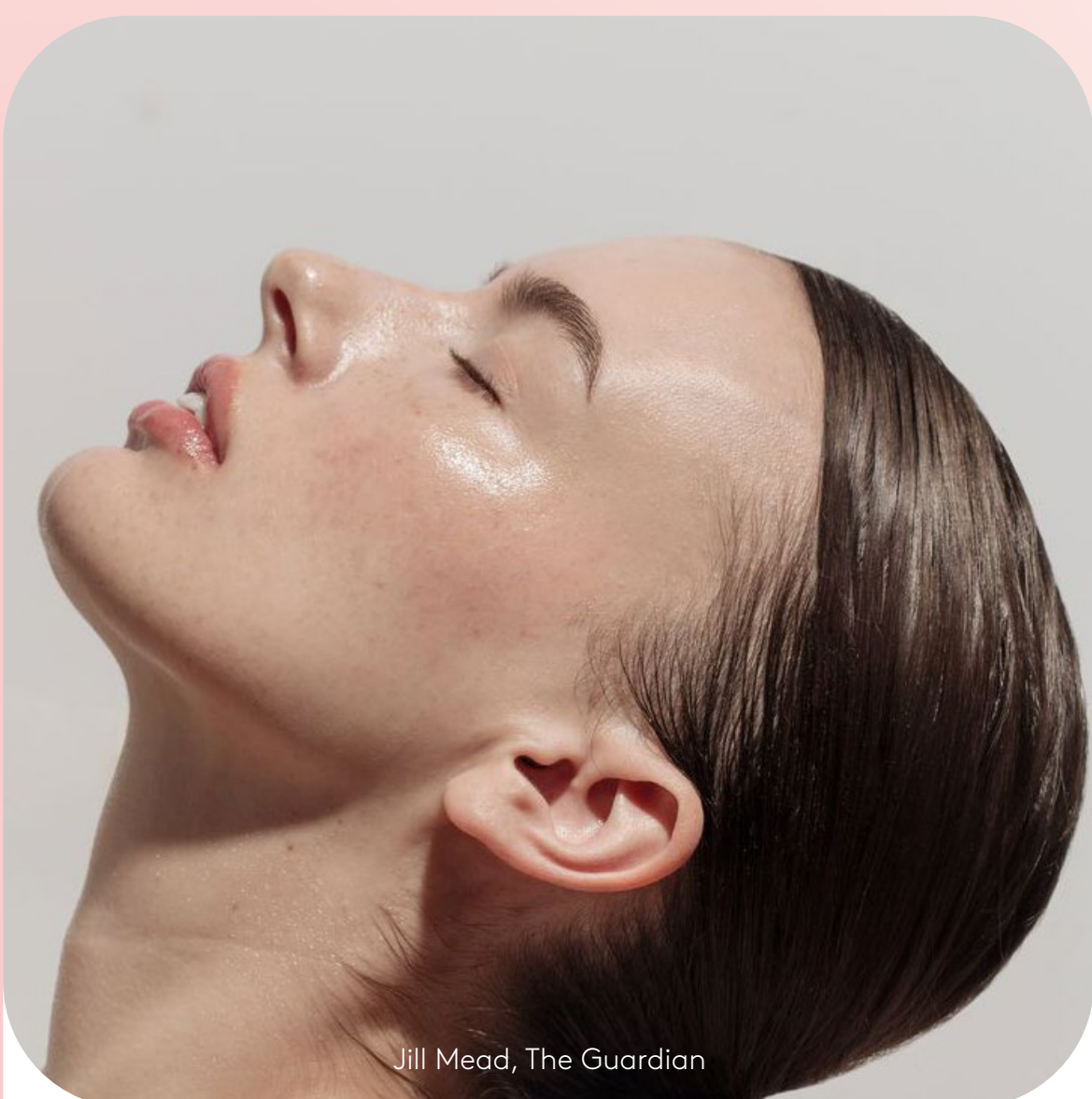
Team-up.

Where beauty meets power. Household brands are storming women’s sports, backing athletes who embody strength and talent. These partnerships inspire participation, celebrate resilience, build community, and **boost brand visibility, loyalty, and cultural relevance** proving supporting female sports is smart business.



Embrace gen x.

Ages (45–60) out spent every generation in beauty in 2025. Age-aware and aspirational, they set the standard younger consumers follow. Icons like Pam and Gillian Anderson influence both peers and Gen Z, who see them as preventative role models. **Targeting Gen X drives immediate sales while building cross-generational relevance.**



Be skiminalistic.

The “clean girl” aesthetic has evolved into minimalist skin, as long, expensive rituals lose appeal amid economic pressures. Consumers are increasingly favoring transparent, natural, and effective routines. **Brands can capitalise by curating multifunctional products, delivering clear messaging, and offer reduced product displays in their store design.**



Less is *more*.

Social media fatigue fuels a new trend: **authenticity as currency.** Quirks and flaws stand out. “Tweak, not transform” rules beauty now non-invasive, subtle, raw. Airbrushed perfection is dead; alternative, androgynous, unconventional looks win, especially with Gen Z, who crave unfiltered, **unapologetic aesthetics.**

PART THREE

The wellness experience.



Firstly, *context.*

Brands react to the world they occupy in order to be relevant and effective. Before we discuss the future of wellness experiences, we must first understand the societal backdrop that's driving the aesthetics.

How can we *feel well*
in a climate of permacrisis?

SOCIETAL DRIVER

Eat, sleep, *scroll*, repeat.

In an era where digital content is omnipresent and increasingly AI-generated, distinguishing between reality and fabrication has become a daily challenge. This constant barrage of information, coupled with diminishing attention spans, is reshaping our cognitive landscape.

In the UK, the average adult now spends approximately 7.5 hours per day on screens, with mobile phones accounting for over 3 hours of that time, surpassing traditional television viewing for the first time. This shift underscores a profound transformation in media consumption habits, particularly among younger generations. For instance, individuals under 24 spend nearly 5 hours daily on their phones, compared to just 1 hour 49 minutes watching TV.

Amid this digital immersion, the rise of deepfake technology has introduced new challenges. In the UK, incidents involving deepfakes have surged by 300% from 2022 to 2023, highlighting the escalating concerns over manipulated media. Meanwhile, a UK survey by Finder revealed that less than 4% of Brits could correctly identify all deepfake videos when shown a mix of real and fake clips; only 57% got more than half of them.

Since the release of ChatGPT in 2022, AI has transitioned from a niche technology to a mainstream tool, significantly impacting various sectors, including media, education, and business. In the UK, over half of adults have used generative AI tools in the past year, reflecting a broader acceptance and integration of AI into daily life.

“Societal cognitive overload, driven by the deluge of information ... poses a critical challenge to human well-being”

SALEM LAHLOU, LSN



Lucy McRae – Body Architect





Alexandria Ocasio-Cortez Met Gala

SOCIETAL DRIVER

Counting the *cost*.

“The cost of living crisis feels like there’s no forward momentum.”

ANDY GIBSON, FOUNDER
MINDAPPLES MENTAL HEALTH CHARITY

The UK is in the grip of a cost of living crisis that is reshaping how consumers perceive value. According to a March 2025 YouGov survey, 56% of Britons report being affected by cost pressures, with 40% expecting further cuts to their usual spending. Only 19% feel confident in maintaining their current lifestyle. Energy prices and inflation remain key drivers, with 82% saying prices are rising faster than their income, and nearly 40% struggling to cover energy bills at least occasionally. (YouGov, 2025)

The financial strain is prompting consumers to reconsider their spending, seeking purchases that provide genuine benefit or meaning rather than simply filling a transactional role. Many are becoming more selective, favouring quality and experiences that enrich their lives, while avoiding products or services that feel degraded or focused solely on profit. People are also becoming increasingly resourceful, exploring alternatives such as resale markets, swapping, and mindful consumption, and placing greater value on time, connection, and personal well-being. This shift reflects a broader redefinition of what constitutes richness and abundance. Rituals, shared experiences, and engagement with brands that foster care, trust, and lasting satisfaction are now prized over mere material gain. In an environment where financial pressures are omnipresent, consumers are actively seeking ways to make their spending more intentional, meaningful, and regenerative, reshaping the rules of value in a world that no longer rewards consumption for consumption’s sake.

Neuro environments.

In a climate of global uncertainty, people are seeking balance and restoration in their everyday lives. Design is now being used as more than an aesthetic tool, it is shaping environments that influence mood, behaviour, and state of mind.

NEURO ENVIRONMENTS

Wellness futures.

Taking a step on from the wellness trends of the 2010s; think living walls, circadian lighting, and biophilic design. 2025 has ushered in a new wave of neuro-environments. These emerging approaches respond not only to a heightened awareness of health and wellbeing, but also to the realities of our current moment: ongoing global economic and environmental crises, coupled with a relentless overload of digital absorption.

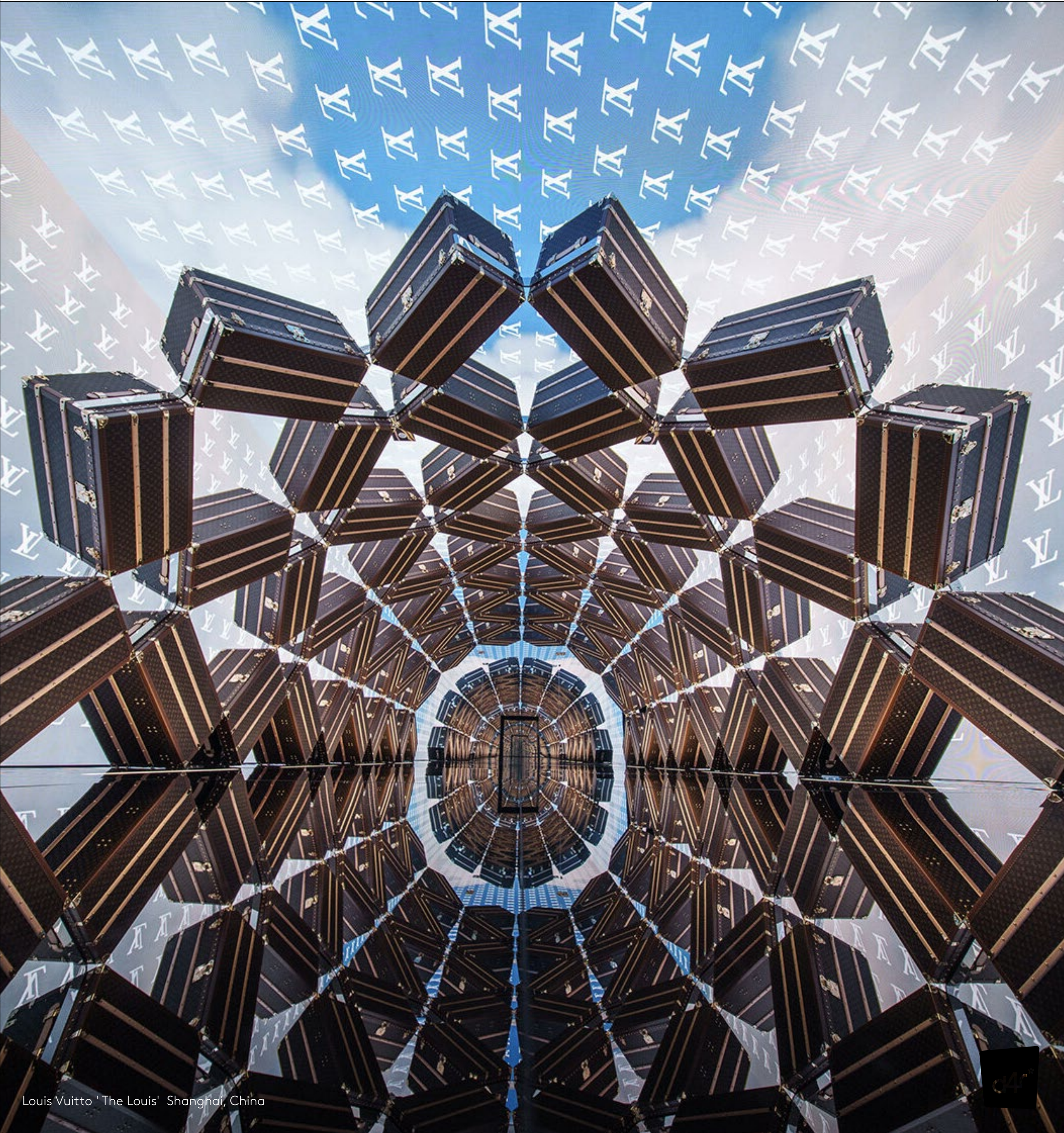
In this climate, physicality is where trust now lies. Experiences and environments are no longer just backdrops to commercial exchange, they are the envelope through which our deepest emotional and mental responses can be evoked. Neuroscience-backed design principles are beginning to shape retail, with spaces crafted to modulate stress, enhance focus, and even trigger joy.

For commercial spaces, this is a pivotal opportunity. Stores are no longer just places to transact; they are sanctuaries that offer a rare disconnect from the everyday; places of respite, escapism, and renewal.

Neuro-environmental design suggests that the future of retail lies not just in selling products, but in shaping experiences that nurture the mind.

“The store of the future is not a place to simply acquire products, but a medium through which consumers acquire meaning”

DOUG STEPHENS, RETAIL FUTURIST



Louis Vuitton 'The Louis' Shanghai, China

How this materialises:



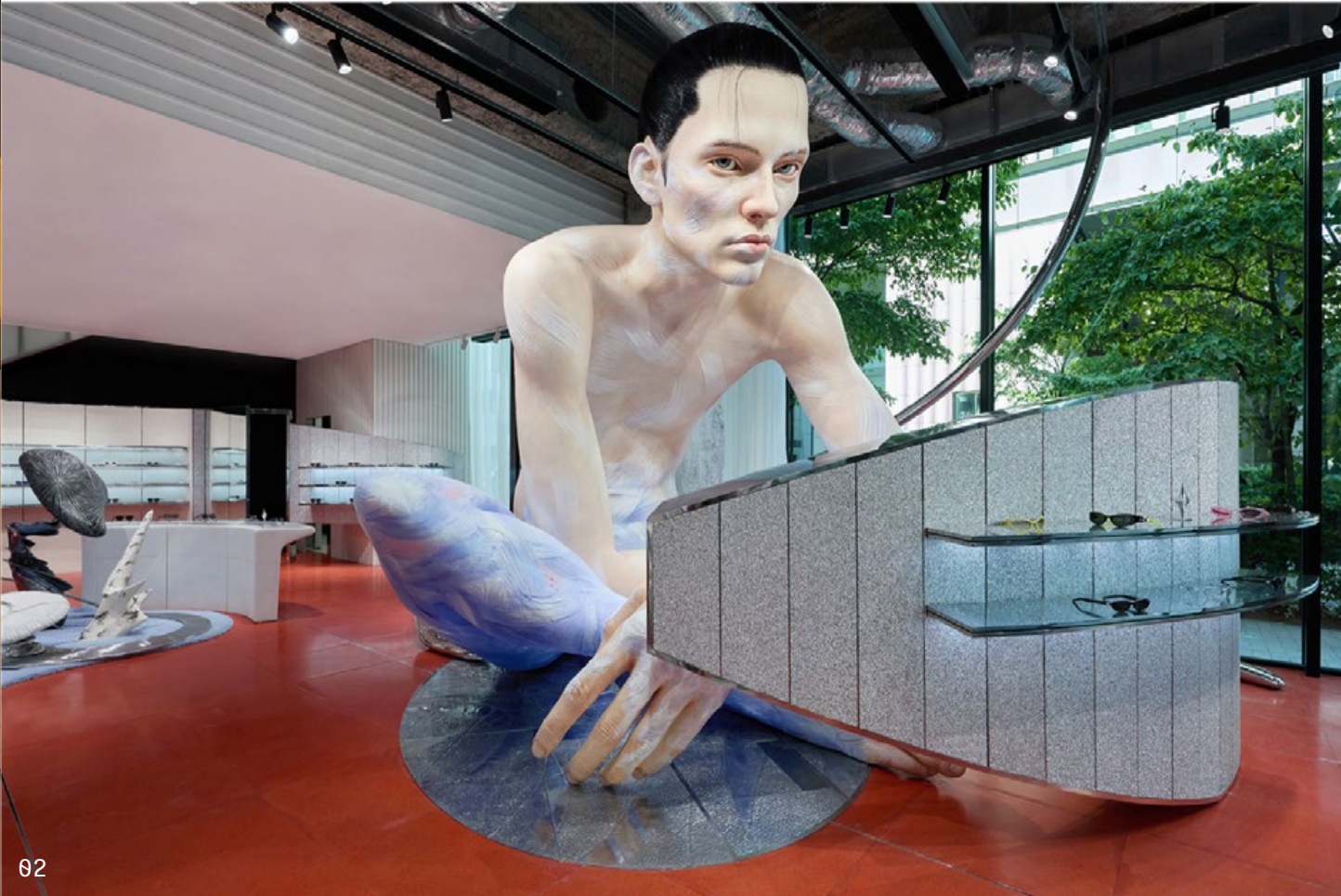
Immersive escapism.

Escapism in retail transforms stores into immersive worlds, offering shoppers a much-needed escape from everyday life. Beyond driving sales, this trend turns stores into cultural landmarks where wonder and emotional engagement flourish.

Experiences like Nike and Pan’s The Suspended Hour at Milan Fashion Week and Frameless Art Exhibitions illustrate how immersive design invites deeper connection by engaging the senses and imagination.

The link between wonder and wellness is clear: awe reduces stress and supports emotional health. Emotional retail experiences do more than foster loyalty—they contribute to mental well-being. **Capgemini reports that 70% of emotionally engaged consumers spend up to twice as much as less engaged shoppers.**

01: The suspended hour by Nike and Pan, Milan Fashion Week 2025. 02: Gentle Monster, Tokyo. 03: New Balance 204L Pop-Up Experience, Shanghai China 04: Framless Immersive Art 2025 Lowinsky - Dawn-of-Venus. 05: Burberry Catwalk, London Fashion Week 2026.



“Wonder and awe are gateway emotions. They can enable a sense of gratitude, appreciation, joy, peace and contentment. Wonder and awe heal because they nourish”

INTENTIONAL COMMUNICATIONS

Case study – Tamburins.



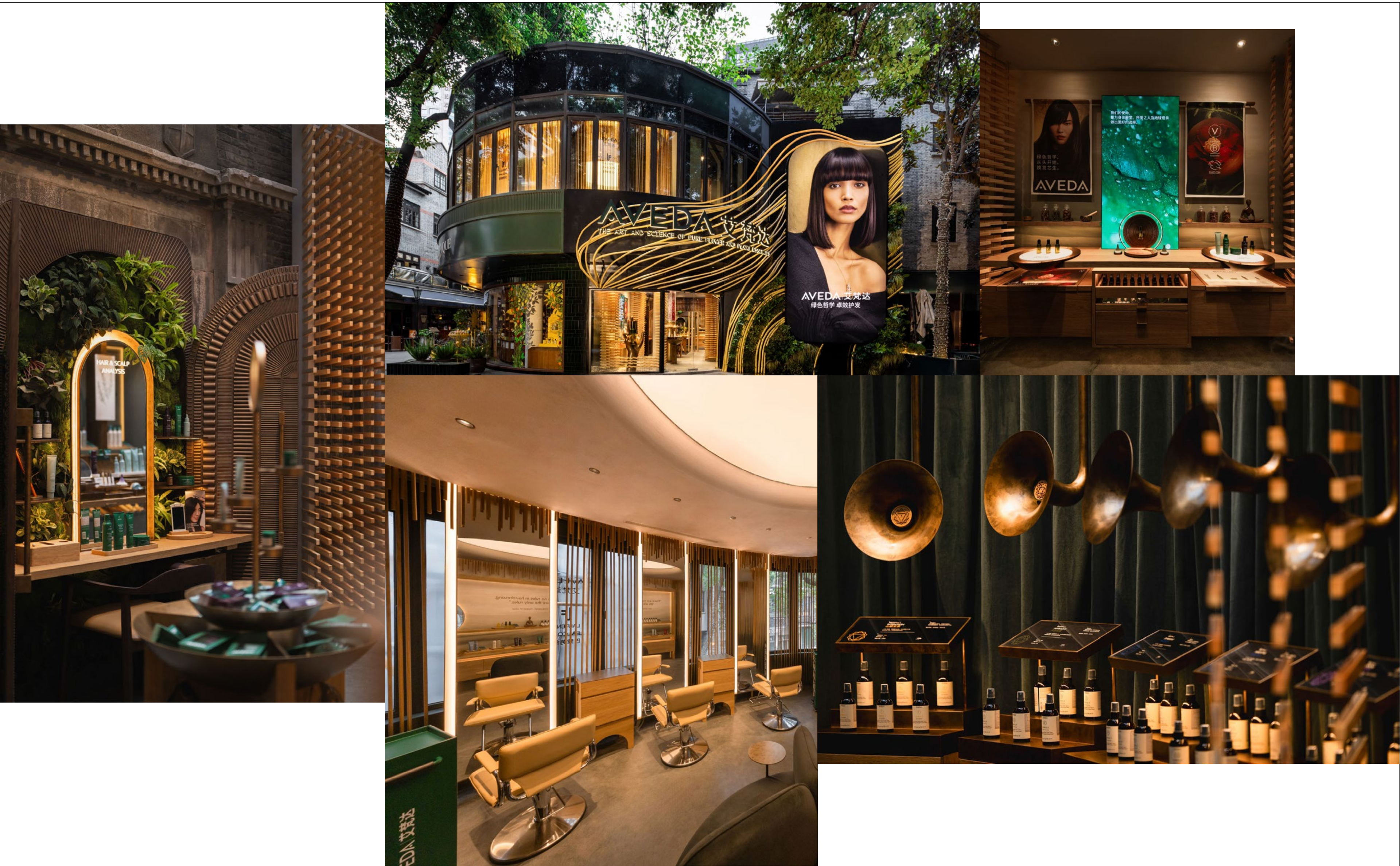
Seoul-born cosmetics brand Tamburins, from the creators of Gentle Monster, aren't just selling products they are crafting immersive, sensory-driven worlds. Each store is a conceptual installation, where organic forms, raw textures and surreal structures blur the boundaries between gallery and retail.

Driven by an “emotion first, product second” ethos, Tamburins champions artistic expression over convention. The result is a striking blend of Korean minimalism and avant-garde design thinking, brought to life across every touchpoint.

Campaigns lean into raw, emotive portraiture, trading commercial polish for art-house intimacy. Here, models become characters woven into the narrative rather than simply promoting it.

From spatial design to crafted visuals and sculptural packaging, everything feels deeply cohesive and intentional. Tamburins doesn't just design spaces, it creates atmospheres that resonate. Their stores aren't about transaction; they're about transporting consumers into a branded world worth stepping into.

Case study – Aveda, Shanghai, China.



Aveda’s first concept flagship in Shanghai redefines retail as an immersive, sensory escape.

Nestled in historic Xintiandi, the two-story store weaves local architectural cues with a bold façade inspired by cascading hair, bringing the brand’s identity to life. Inside, over 50 curated products meet ritualistic experiences: a calming Aroma Room, personalized scalp analyses, and ceremonial handwashing stations create a mindful journey.

The serene interiors, textured materials, and moody lighting invite visitors to disconnect and engage deeply with their senses. Upstairs, a luxe salon offers bespoke styling and exclusive events, blending beauty, wellness, and innovation in one transformative space.

This flagship marks a new chapter in experiential retail—anchored in sustainability, sensory design, and cultural connection. Aveda excels at merging authentic storytelling with multisensory immersion, offering a blueprint for brands aiming to create meaningful, wellness-focused experiences that resonate beyond transactions.

Experience toolkit.



Frameless x Van Gogh Art Exhibition

Immersive spaces

Craft environments that fully envelop the senses to transport occupants beyond the everyday into realms of imagination and possibility. Immersive spaces spark curiosity and awe, encouraging exploration and emotional engagement that extends far beyond a single visit or purchase.



Tamburins Blue Hinoki Balm

Brand continuity

Every element of a brand should deliver a consistent story. The retail space, product offering, packaging and online presence must all align, creating a seamless experience that feels instantly recognizable. This will strengthen identity and build trust and loyalty by ensuring customers encounter the same brand values at every touchpoint.



Rare Beauty's Soft Pinch Luminous Powder Blush collection event

Engagement

Encourage active participation rather than passive observation. Interactive features and selfie opportunities invite users to explore and experiment, turning spatial experiences into memorable moments, sparking meaningful connections between customers and the brand and amplify presence across social channels.



Glossier You Fleur Perfume Pop-up

Pop-ups

Pop-ups provide a unique opportunity to create moments of escapism. Their temporary nature allows brands to transform small spaces into fully immersive experiences, captivating customers and transporting them beyond the everyday. By focusing on creativity, storytelling and sensory engagement pop-ups make a lasting impression.

Overload antidote.

In a world of constant sensory input, a new design movement is gaining momentum: deprivation respite. Spaces built not to overwhelm, but to withdraw offering a visual and emotional pause from daily overload.

Through the absence of excess minimal interiors promote wellness by allowing space for mindfulness and self-reflection. It's a spatial echo of wellness trends like sound baths and sensory deprivation therapy.

Tokyo's 025S Harajuku embodies this ethos, the stripped-back fragrance store allows scent to take centre stage. Similarly, James Turrell's Skyspaces remove visual reference points, using light to ground focus and evoke calm.

This isn't about less for less' sake, it's about clarity, presence, and designing moments that allow us to feel more by sensing less.

01: James Tyrrell Skyspaces. 02: Audi Concept C 03: Songs in a Skyspace . 04: Doug Wheeler LC 71 NY DZ 13 D. 05: 025S Harajuku, Tokyo



01



02



03



04

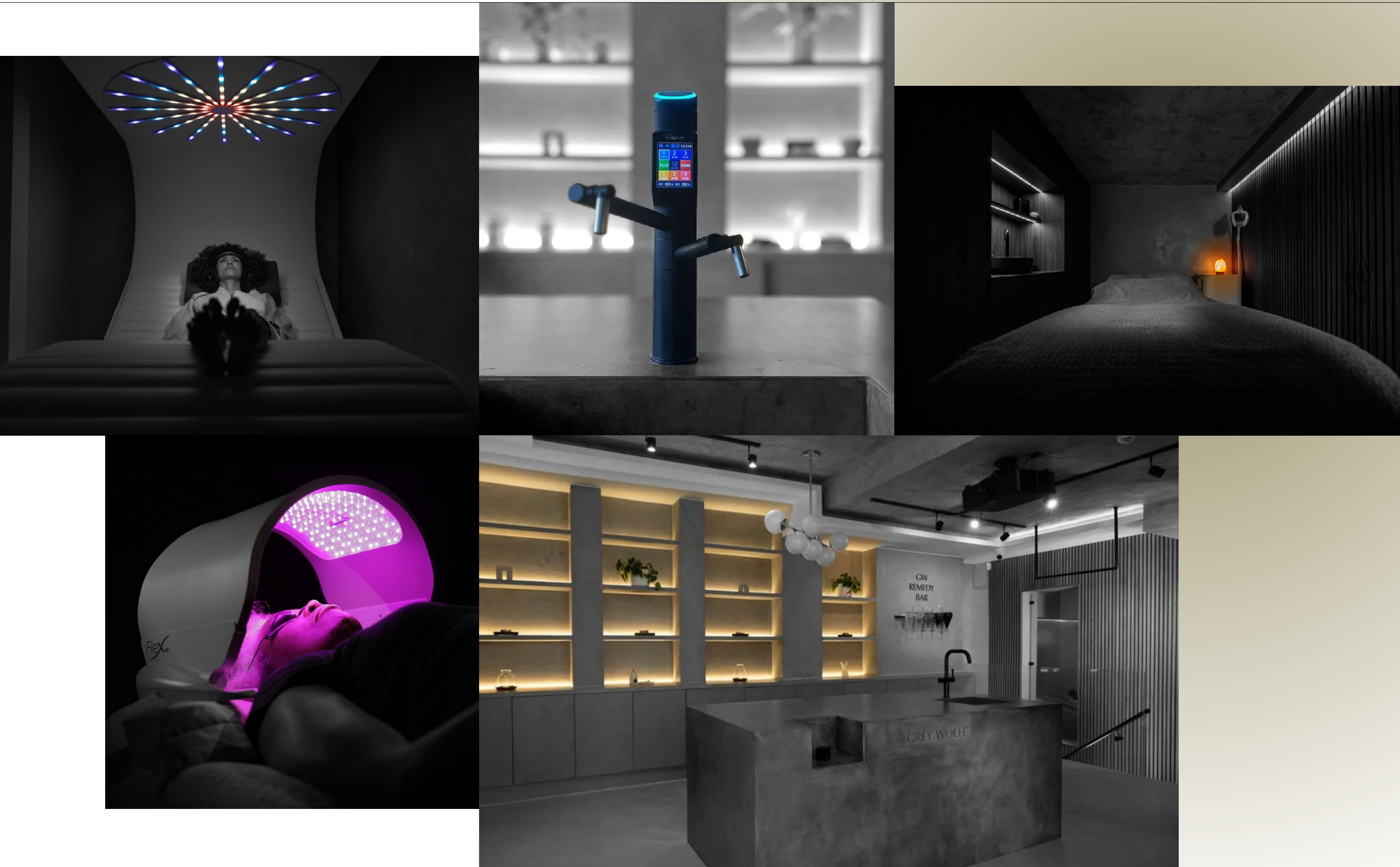


05

“There’s a common assumption that wellness is something you buy or access externally – through products, prescriptions or platforms. But we see it more as a remembering of what already exists within”

CARLOS URRUTIGOITY
GENERAL MANAGER AT GREY WOLFE

Case study – Grey wolfie, spa.



Grey Wolfe, a London-based private members' club, reimagines wellness through a philosophy rooted in stillness and solitude.

Designed as a sanctuary from the noise of daily life, the club offers members exclusive access to a space where they can disconnect deeply, alone or with a guest, and find genuine restoration of both body and mind. Personalisation is central to the experience, with biotech-infused treatments that allow therapists to respond intuitively to each individual's unique wellness journey.

Biotech-infused treatments like AirEnergy+ respiratory therapy and the light-guided Rebalance bed combine intuitive care with advanced precision, providing tailored wellness.

The interiors reinforce this ethos with a minimalist aesthetic that subtly engages the senses. Natural materials such as grey marble and slatted timber, paired with soft ambient lighting, create a calm, spa-like atmosphere designed to encourage sensory immersion and quiet reflection.

For retail brands, Grey Wolfe offers a clear lesson: immersive environments, intentional design, and a focus on emotional restoration can create spaces that go beyond service, cultivating loyalty through presence, personalisation, and purposeful disconnection.

Case study – Salt salon.



Audio-led spaces are having a moment. From Tokyo-inspired listening bars to boutique venues, sound has become the design material of choice. Unknown Works has now brought this sensorial trend into a London hair salon.

Salt Salon have reimagined a Victorian storehouse to become both a sleek salon and cultural hub. Founder John Paul Scott, who began his career in electronic music, launched SALT in 2020 with a vision to combine high-level haircutting and colour with a mindful, supportive environment for clients and staff alike.

Sound runs through the design creating an audio-led space where haircare, wellness, and cultural programming coexist.

Inclusivity is central to SALTs offering with stylists trained across all hair types and women-only sessions with female staff, offering a welcoming space for womens who's religion encourages privacy and discretion.

Salt Studio Borough proves a salon can be more than a service: it’s a cultural venue, a workplace of care, and an instrument in its own right, where design, wellness and inclusivity play in harmony.

Experience toolkit.



Underground Dome for Museum SAN, Tadao Ando & Antony Gormley

Reductionism

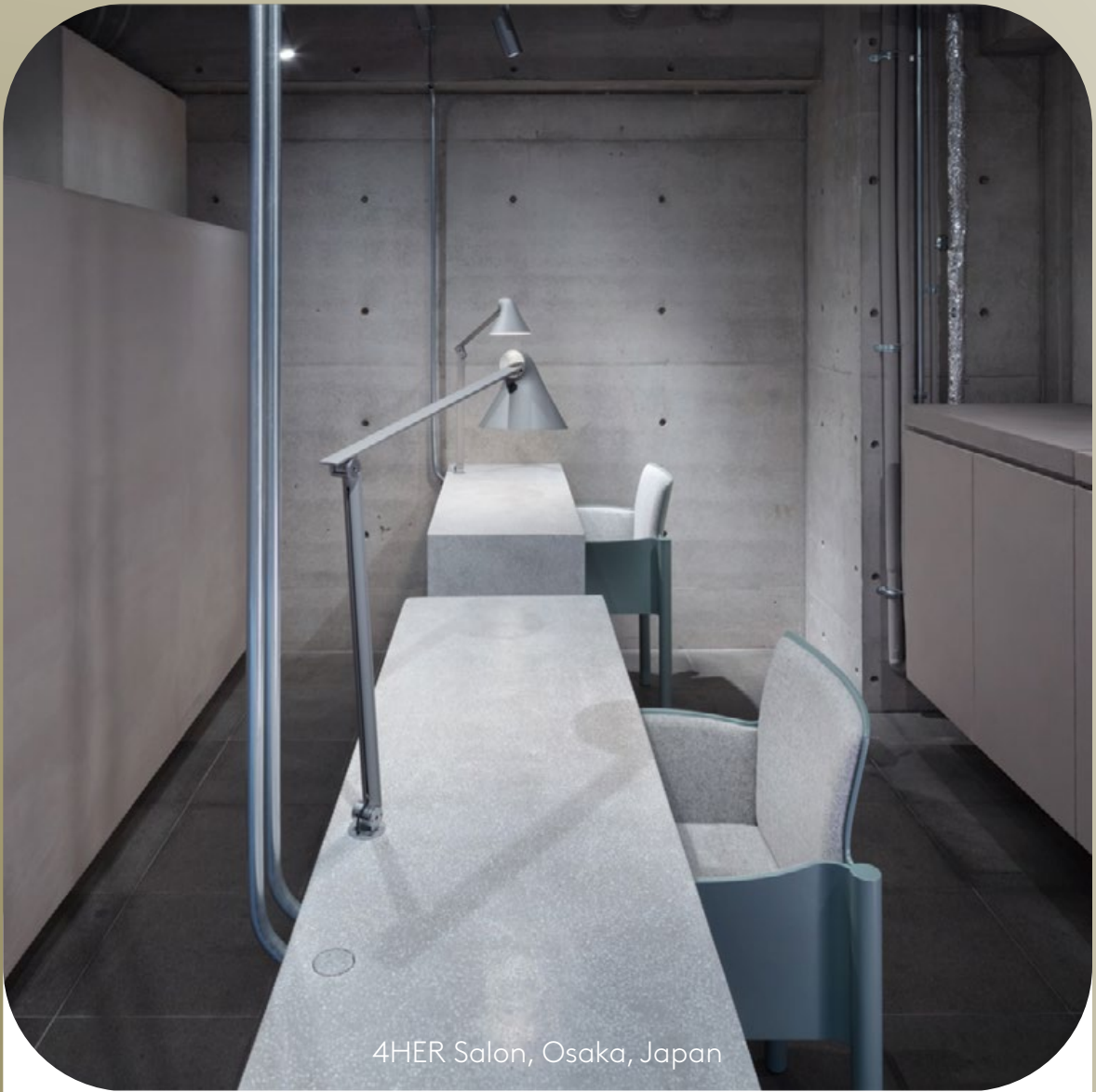
Focus on removing excess and simplifying design elements to create clarity and calm. By paring back visual, tactile, and spatial “noise,” reductionalism lets the essential emerge, giving occupants room to notice, reflect, and engage with a space on their own terms.



COS x Snarkitecture Installation at Salone del Mobile

Stimuli sensitivity

Adjusting sensory input can create spaces that feel both comforting and clarifying. By selectively dulling certain stimuli, sound, light, or texture, you enhance the presence of others, allowing occupants to focus, reflect, and engage more deeply with their surroundings.



4HER Salon, Osaka, Japan

Brutalist interiors

Embrace raw, honest materials and bold structural forms to create grounding, tactile environments. Exposed concrete, natural stone, and unadorned surfaces heighten spatial awareness and encourage mindfulness through texture, scale, and materiality, offering a sensory pause from the overly polished or decorative.



Beyond the Screen, Installation by Barcelona Activa

Digital detox

Design spaces that minimize or remove screens and digital interruptions to support presence and mental reset. By creating environments where technology is consciously limited, occupants can reconnect with the physical world, sensory experience, and self-reflection without constant digital distraction.

The future of beauty: final thoughts.

The future doesn't perfect the reflection, it redefines it.

Beauty is evolving from surface to system. From skin to signal. From ritual to intelligence.

It moves through neuro-environments and fluid futures, adapts to flat aging and cyclical care, and finds balance between body, data, and planet.

AI powers it. Biology personalizes it. Culture gives it meaning.

The next era of beauty won't be bottled it will be lived, learned, and felt.

Because the future of beauty isn't about looking forward it's about becoming future itself.

The brands that will define the future don't just make products they create ecosystems. They merge biology, technology, and emotion into experiences that learn, adapt, and respond. Innovation drives them. Purpose guides them. They don't follow trends they anticipate culture, designing beauty that flows with the individual and honours the planet.

Relevance is measured in nuance, not noise, every touchpoint is care, every innovation is conscious.





Let's
talk.

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