LS:N GLOBAL

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Beauty, Health & Wellness Futures

The Great Beauty Blur

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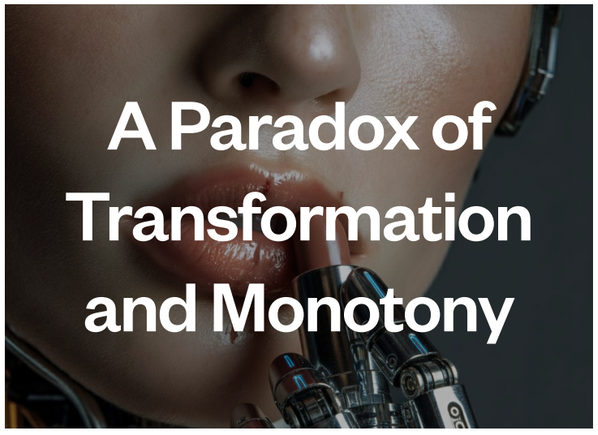
34 Strategic Worksheets



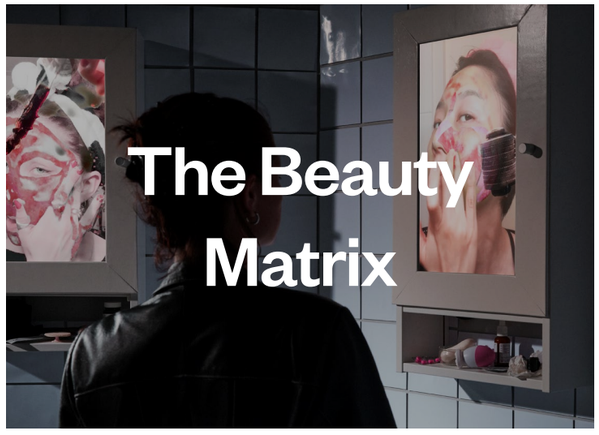
Front cover and above: Isamaya's Hyalurolip delivers a plumped, glossy finish in a nod to the aesthetics of lip filler, UK

At a Glance

Key topics and takeaways from the report



Beauty has evolved dramatically over the past century, influenced by Hollywood glamour and modern minimalism, and body positivity and wellness movements – but today the sector feels more uniform than ever



Social media and digital tools are amplifying narrow beauty ideals, turning identity into currency. Meanwhile, social, political and legal pressures increasingly constrain freedoms of personal identity and self-expression – especially for women and marginalised communities



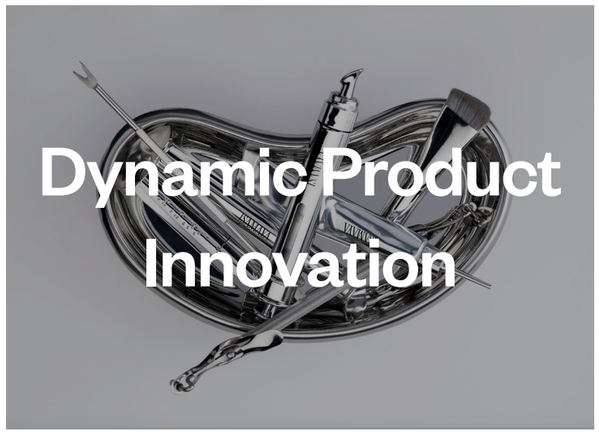
Rapid growth and investor pressure are pushing beauty companies towards imitation over innovation, prioritising safe trends instead of storytelling, creativity or cultural depth



From neon Beetlejuice lips to theatrical prosthetics and avant-garde storytelling in make-up and fragrance, beauty disruptors are embracing provocation, distortion and interpretive aesthetics to break digital monotony



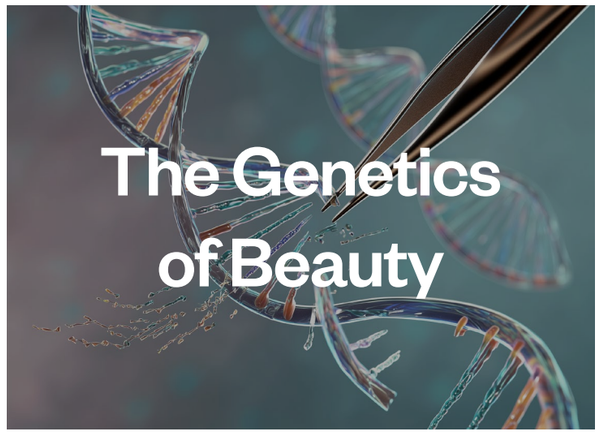
Local rituals, cultural heritage and traditional aesthetics are being re-invented. Diasporic creativity, subcultural mash-ups and regional fragrance brands are layering histories and influences to redefine contemporary beauty



In response to homogenisation, brands are exploring multi-sensory, layered and contextually adaptable experiences that restore emotion, individuality and intrigue

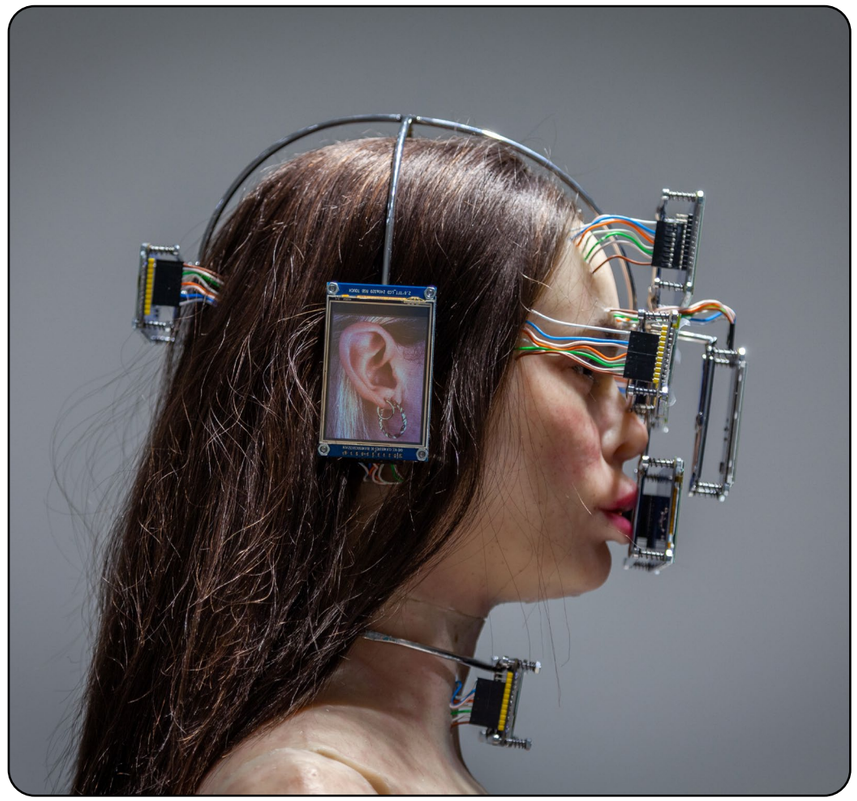


In a world where digital and physical realities are blurring, people are experiencing identity distortion amplified by uniform beauty ideals. The industry is poised to shift from promoting external perfection to guiding perception and nurturing self-connection



Uniform and extreme beauty ideals may begin to shape partner choice, empowering specific appearances and social traits, with potential long-term consequences for genetic patterns and the diversity of future populations

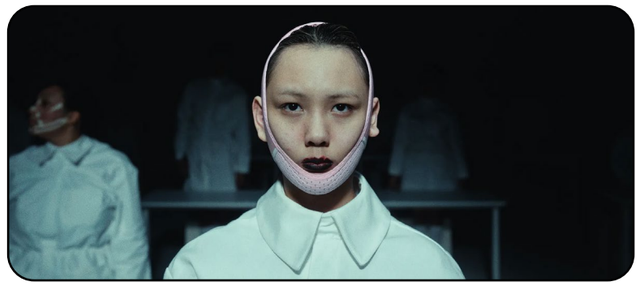
Key Statistics



Global aesthetic procedures reached nearly

38m in 2024

17.4m surgical and **20.5m** non-surgical – up **42.5%** since 2020 (source: The International Society of Aesthetic Plastic Surgery)



85%

of girls in the UK have used filters or apps to alter their photos by age 13, and **67%** try to change or hide at least one body part before posting (source: Dove)

Gene-editing technology CRISPR is projected to reach

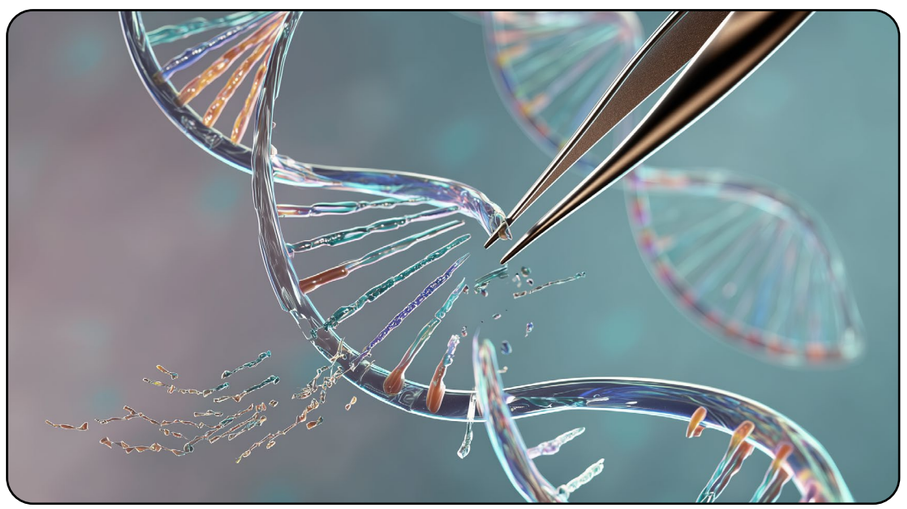
£9.53bn

globally by 2032 (source: Verified Market Research)

The global beauty and personal care market generated

£486.2bn

in 2024 and is projected to reach **£596.3bn** by 2030, showing a steady upward trend (source: Statista)



90%

of girls aged 10–17 follow at least one social media account that makes them feel less beautiful, while over half (**56%**) say they can't live up to the beauty standards projected online (source: Dove)

Clockwise: Filip Ćustić, pi(x)el, 2022, Spain; The Periodic Fable™ by The Ordinary created by Uncommon, UK; AI imagery by The Future Laboratory, UK

Key Statistics

Beauty spending among US female teens rose

10% **year on year**

in 2025 to an average of **£279** – the highest level since the survey began in 2007 (source: Piper Sandler)



5,340

dating app swipes show that noticeably increasing attractiveness raises selection chances by **20%**, far more than intelligence, height or occupation (source: ScienceDirect)

The BeautyMatter Deal Index tracked 59 deals in Q1 2025,

down 9.2%

year on year. Growth deals fell **28.1%**, while M&A deals rose **12.9%** (source: BeautyMatter)

33–57%

of people exposed to social media show increased interest in cosmetic procedures, according to a meta-analysis (source: ResearchGate)





Clockwise: Isamaya Hyalurolip, UK; La Beauté pop-up by Louis Vuitton, US; The Periodic Fable™ by The Ordinary, created by Uncommon, UK

Introduction

Beauty has become monotonous, influenced by powerful algorithms that entrench long-standing ideals. Its future depends on embracing complexity, friction and cultural depth to spark genuine connection and consumer curiosity

Lead analysts

Fiona Harkin, *director of foresight*

Olivia Houghton, *insights & engagement director*

Emily Rhodes, *creative lead*

Consumer Foresight and Trends Intelligence, powered by LS:N Global

Beauty has transformed dramatically over the past century yet, paradoxically, it has never felt more monotonous.

Beauty ideals have always satisfied a deep-rooted impulse to admire, aspire and affirm identity. In the early 20th century, these ideals revolved around Hollywood glamour and racialised Eurocentric standards. Mid-century brought modernist minimalism, 'classic' femininity and the polished tv aesthetic. By the early 2000s, the body positivity movement disrupted the narrative, with campaigns such as Dove's Real Beauty challenging narrow ideals. In the 2010s beauty was blurred with wellness, as skincare became self-care and figures like singer Alicia Keys and actor Pamela Anderson embraced a no-make-up stance while others reversed cosmetic procedures.

The 2020s ushered in technological acceleration – what The Future Laboratory calls The Great Acceleration – embedding beauty ideals deeper into our collective consciousness and creating a more homogenised landscape than ever.

In 2012, global social media use averaged 90 minutes per day; by 2023, it had risen to 151 minutes (source: Statista). In theory, this connectivity should have expanded our aesthetic horizons. As neurologist Anjan Chatterjee tells The Future Laboratory: 'People exposed to many more physiognomies tend to have a richer and more varied sense of beauty. The internet has allowed exposure to many more examples of how people look.'

Yet reality has not delivered. Systemic bias in platform design, algorithms that reward engagement over diversity, and an era of what Dazed calls 'undetectable beauty' created by filters and cosmetic tweaks, have elevated a narrow ideal. Trends conforming to this ideal are amplified, users adapt, and diversity in appearance and expression is eroded.

This homogenisation goes beyond appearance. It informs branding, advertising, packaging and formulation strategies – favouring safe, proven and trend-led approaches. It even flattens experience, stripping away individuality and sensory richness. As Ayanda, host of podcast Soul Salon, puts it: 'How joyless our society must have become if we find joy in the process of individually, isolatedly beautifying ourselves using these consumerist products that we are taught to glorify.'

For many brands, the notion of a 'dilution of beauty culture' may seem abstract or distant. Yet chasing rapid growth through technology often means – intentionally or not – reinforcing uniformity. As explored in The Synthocene Era, diminishing diversity carries serious implications. Just as genetic diversity safeguards species' survival, cultural and expressive diversity enriches society and equips it to navigate uncertainty. Without it, we risk fragility – less able to adapt, innovate or thrive in a world defined by rapid change.

But for now, those characteristics that make us human – sensory, emotional, subjective – still prevail. This is where the opportunity lies.

Resisting algorithmic fluency is urgent. This report shows the value of rejecting formulaic aesthetics, embracing interpretive design and amplifying under-represented narratives. It highlights the way forward for brands ready to reclaim beauty's narrative, connect with audiences authentically and stay ahead in a rapidly evolving cultural landscape.





Methodology: Overview

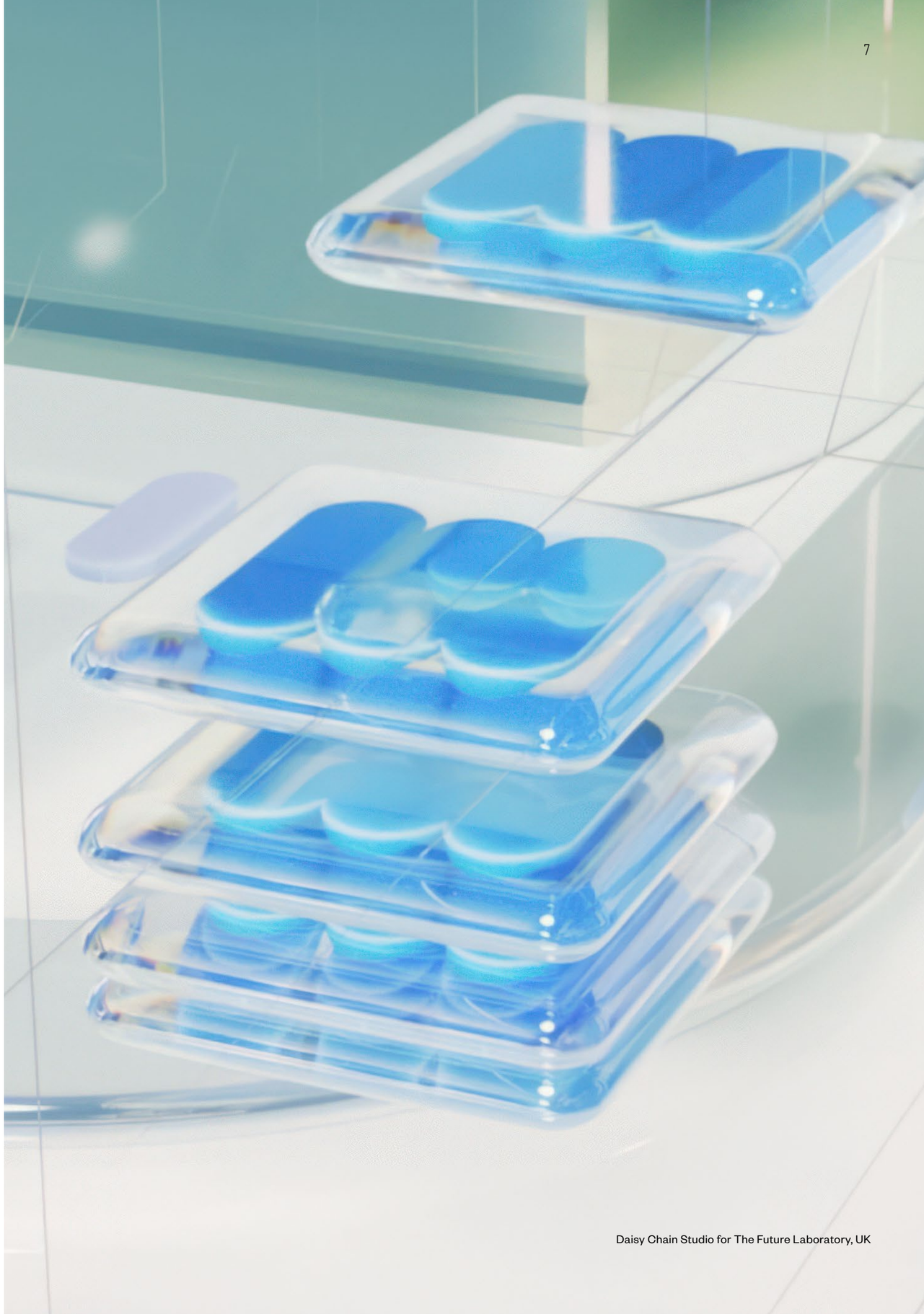
Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

But our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is **provable, practical** and **minimises uncertainty**.

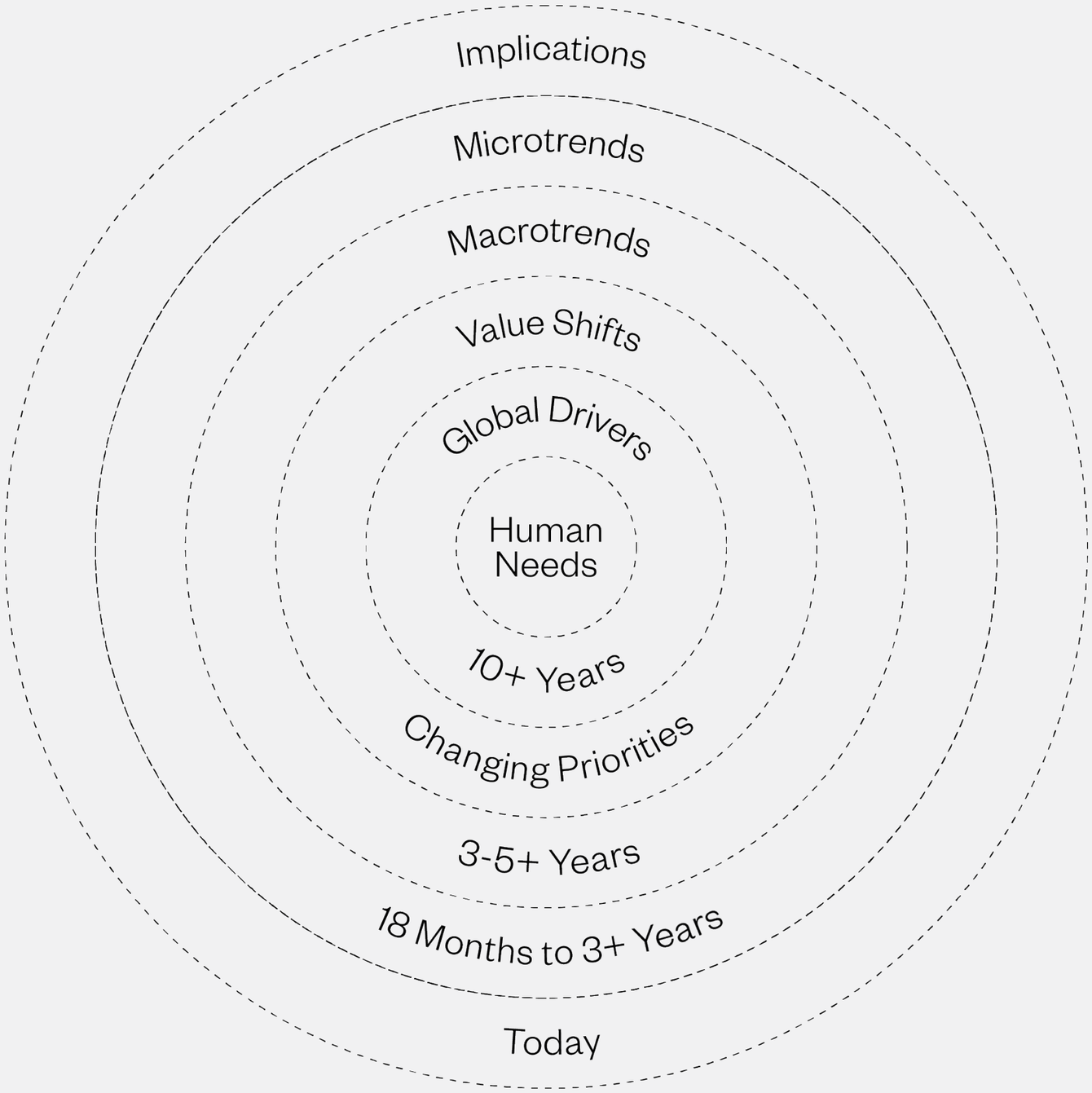
We do this by understanding the influence of **six global drivers** causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging **macrotrends** and **microtrends**, and ascertain what their implications are for the future landscape.



Daisy Chain Studio for The Future Laboratory, UK



The Future Laboratory's proprietary foresight methodology

Methodology: Foresight Process

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10-years+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories.

Methodology: Global Drivers



Accelerating Technologies

For billions of people around the world, technology has become enmeshed with their humanity – often clashing as we adjust to this new Synthocene Era. Adoption and innovation continue to accelerate, specifically AI, and increasingly, quantum technology.



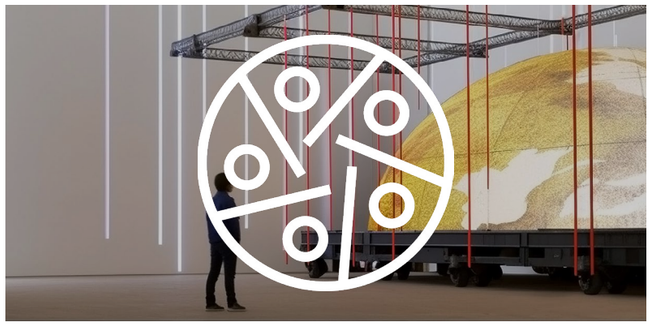
Climate Crisis and Resource Scarcity

We are at a climate tipping point, with increasing disruption and devastation across the globe. Urgency has turned into emergency, existentially threatening humanity and industry. But a growing sense of pragmatism over doomerism is clashing with industry roll-backs on sustainability commitments.



Evolving Demographics

Over the next decade the shape of our global population will change dramatically. Global economic instability due to falling fertility rates and ageing populations in some regions may be rebalanced by a growing youth workforce in others – with far-reaching repercussions for societies and industries.



Fragmenting Societies

Fractious inequalities and divisions are being exposed in a fast-changing, unstable world. The deterioration hinges on the increasing fragility and fragmentation of social, political and environmental ideologies, driving factions into isolated silos and societal polarisation, with apathy and misinformation clouding the way forward.



Micro-globalisation

The liberalised world we live in is inextricably interconnected but it has left us in a state of co-dependency rather than cooperation. Without equitable alignment, resilience may never come from an integrated and interdependent global economy, championing a renewal of localism and national pride.



Urbanising World

Despite the repercussions of a global pandemic, cities remain the epicentres of society. Priorities for living, working and playing in these urban environments are being redefined, with liveability, connectivity, sustainability and health and wellbeing becoming expectations rather than aspirations.

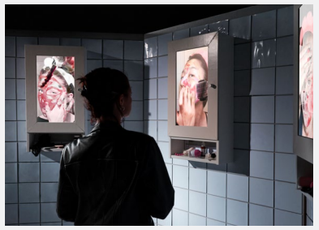
Mimetic Make-up
Isamaya's Hyalurolip mimics the effects of lip filler with hyaluronic acid for a plumped, glossy finish, but also visually references the cosmetic procedure itself, UK

Drivers

The culture and commerce of beauty are locked in a feedback loop of sameness, where accelerating technologies and cultural and market forces reinforce old ideals and strip away diversity, depth and originality

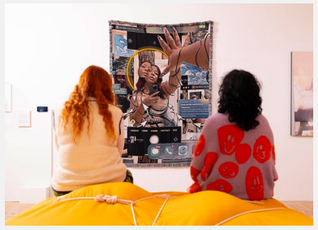
What are the drivers of a macrotrend?

These drivers define the landscape from which the macrotrend is emerging, detailing the consumer attitudes, market and sector shifts, as well as the cultural, social, economic, political, technological and environmental forces shaping a macrotrend. Each driver emerges from one or more of our global drivers



Algorithmic Amplification

Digital algorithms prioritise familiar, easy-to-consume content, reinforcing narrow beauty ideals while shaping preferences and aesthetics. Although controlling, these systems can also be subverted, enabling new forms of self-expression and identity



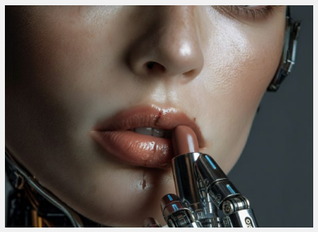
Identity Capital

Beauty has become a digital commodity, where appearance drives social validation, brand influence and status. Platforms and AI amplify scrutiny, performance and feedback, intensifying pressures on identity and public perception



Beauty as Privilege

Health and beauty converge as visible wellbeing becomes status. Science, biohacking and data-driven self-improvement redefine beauty, making skin, metrics and routines signals of discipline, privilege and elite self-management



Control Culture

While aesthetic autonomy grows, broader freedoms shrink, disproportionately affecting marginalised groups. Beauty norms, minimalist trends and algorithmic curation reinforce power structures, cultural exclusion and digital biases that add privilege to whiteness and conformity



The Blandification of Brand

Despite apparent choice, beauty is homogenised by consolidation, imitation and investor-driven growth. True innovation emerges through community-led, personalised and bio-individual approaches that resist sameness and foster differentiation

Algorithmic Amplification

As outlined in The Synthocene Era, digital spaces have become echo chambers where algorithms favour familiarity over diversity. Platforms like TikTok, Netflix and Spotify reinforce existing tastes rather than challenge them.

These systems maximise engagement by prioritising content that is easy to consume, replicate and monetise. Consequently, trends that feel safe, recognisable and emotionally frictionless dominate.

Human psychology amplifies this. A 2024 meta-analysis across 29 countries cited by the American Psychological Association found that mental effort is 'inherently aversive', meaning our brains prefer ease and familiarity, especially in an overstimulated world. Algorithms exploit this by feeding us visually efficient, cognitively safe content.

In beauty, the impact is clear. As our 2018 macrotrend Algorithmic Beauty foresaw, digital platforms are reshaping aesthetics. TikTok creator and aesthetician Wizzo explains how the 'Instagram face' rewires our brains: repeated exposure to symmetrical, smooth faces triggers dopamine spikes, creating neural shortcuts where familiarity becomes addictive.

The mechanics of digital spaces also play a role. 'Even if you don't follow certain creators, your For You page still highlights youthful, light-skinned, Eurocentric features,' beauty culture expert and author of UGLY, Anita Bhagwandas tells The Future Laboratory. 'Social media is deceptive – there's so much we don't see.'

Yet the systems themselves are paradoxical. Mathilde Friis, co-curator of Virtual Beauty (July–September 2025, Somerset House), observes: 'Digital beauty is both a space of control and possibility… Algorithms can reinforce old biases around race, gender and desirability, but they can also be used subversively to imagine new forms of self-expression.'

Algorithmic influence extends beyond Instagram and TikTok. Pixel Flesh author Ellen Atlanta recalls working on a beauty booking app: 'We could, in theory, build an algorithm that made an entire group of girls in one area look a certain way… then simply switch it. That's when I realised it was already happening across the beauty industry.'

Global Drivers
Accelerating Technologies, Fragmenting Societies

Algorithms and digital platforms accelerate cultural homogenisation by reinforcing familiar, repetitive beauty ideals – often shaped by prevailing cultural biases embedded within the technology and its creators

'Algorithms can reinforce old biases around race, gender and desirability, but they can also be used subversively to imagine new forms of self-expression'

Mathilde Friis, co-curator, Virtual Beauty, Somerset House



Altering Facial Features with WH5 by Hyungkoo Lee, 2010, at the Virtual Beauty exhibition, Somerset House. Photography by David Parry, UK

‘I grew up in front of the world, and for some reason, people can’t seem to grow with me. Instead, they act like I’m supposed to stay frozen in time’

Millie Bobby Brown, actress





Above: Omniprésence (1992) by Orlan at the Virtual Beauty exhibition, Somerset House. Photography by David Parry, UK; Left: It’s All For U (If U RIly Want It) (2024) by Qualeasha Wood and Excellences & Perfections (Instagram Update, 1 June 2014) (2015) by Amalia Ulman at the Virtual Beauty exhibition, Somerset House. Photography by David Parry, UK

Identity Capital

Beauty has long been tied to labour and social value, but in the 20th century, it became a visible commodity. Today, the face is a tool for profit, validation and brand-building, where appearance directly fuels follower counts, brand deals and perceived worth.

Pop culture mirrors this shift. Satirical TikTok phrases like ‘Face Card Never Declines’ liken beauty to a limitless credit card, implying a ‘good face’ guarantees access, attention and status. This dynamic surfaced in American Eagle’s controversial Sydney Sweeney Has Great Jeans campaign (July 2025), criticised for linking genetic traits to social status while reinforcing narrow Western beauty ideals.

But platforming identity carries broader social consequences, says Together Group’s global senior vice-president of beauty and wellness Madeleine Boyd. ‘Publishing your face online invites public ownership, normalised by viewing digital personas as separate from real people – either because online appearance differs from offline reality or because it is framed as performance rather than authentic expression.’ As Stranger Things actress Millie Bobby Brown notes: ‘I grew up in front of the world, and for some reason, people can’t seem to grow with me. Instead, they act like I’m supposed to stay frozen in time.’ While celebrities have long faced scrutiny, digital culture has intensified it through public discourse.

Ordinary people are now participating in personal appearance feedback via trends like TikTok’s #howcanibeprettier or subreddits like True Rate Me, where users are rated on a 1–10 scale based on purportedly scientific beauty metrics. AI is also becoming a tool for beauty advice.

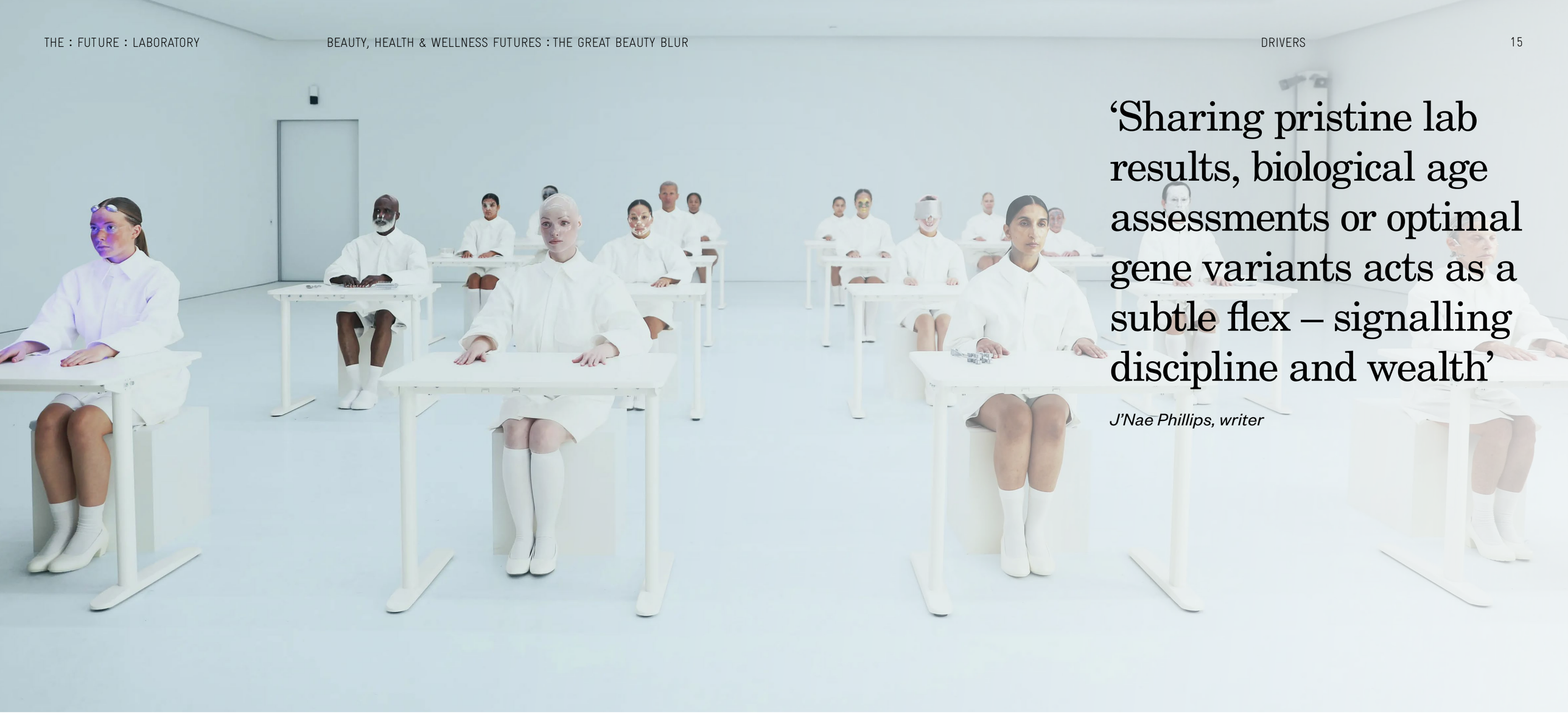
These dynamics surfaced earlier in experimental form. Somerset House’s Virtual Beauty exhibition (July–September 2025) revisited artist Orlan’s performance work, where she broadcast her seventh plastic surgery procedure and received live audience feedback.

Today, the tensions are resurfacing in debates around deepfakes and digital exploitation, with some claiming that sharing your image online waives privacy rights – a justification increasingly used for unethical AI-generated content.

Global Drivers
Accelerating Technologies, Fragmenting Societies

Digital platforms turn identity into currency, where visibility invites scrutiny and conformity. Technology quantifies and commodifies appearance, fuelling cultural influence through curated, performative beauty and constant public evaluation

Cosmetic Chore
Acne Labour by Emma Lambaa-Bonde is an immersive video installation repositioning skincare from a leisure activity to labour. Photography by Femke Reijerman, The Netherlands



‘Sharing pristine lab results, biological age assessments or optimal gene variants acts as a subtle flex – signalling discipline and wealth’

J’Nae Phillips, writer

The Ordinary launched The Periodic Fable™ campaign that replaces elements with 49 beauty buzzwords to expose the pseudoscience behind skincare marketing. Created by Uncommon, UK

Beauty as Privilege

Health now shapes beauty ideals, with skin, in particular, positioned as a mirror of internal wellbeing. Our 2022 Accredited Beauty macrotrend highlighted a Euromonitor survey in which 50% defined beauty as ‘looking healthy’ – a figure that continues to rise as people prioritise feeling good over looking good (source: Metagenics).

The Future Laboratory’s 2023 Longevity Lifestyles report examined this convergence through science-driven, medically inspired solutions, from cellular regeneration to the aesthetic effects of GLP-1 medications.

Although positive, this shift reinforces a narrow, optimised, status-driven ideal. Biohacking, wearables and longevity culture reframe beauty through data, turning the body into a tracked project subject to critique and privilege.

Routines now mimic productivity rituals, focused on consistency, efficiency and measurable progress. Professor Meredith Jones from Brunel University London calls this ‘makeover culture’, where people are judged as ‘valuable’ based on visible self-improvement. She adds that a ‘valuable self’ extends beyond beauty to anyone constantly upgrading through cosmetic surgery, fitness, fashion, home renovations or education.

This culture of self-improvement has become status-signalling. Writer J’Nae Phillips tells youth culture publication Dazed: ‘Sharing pristine lab results, biological age assessments or optimal gene variants acts as a subtle flex – signalling discipline and wealth required for testing, coaching and biohacking. Just as clean eating was aestheticised on Instagram, ‘clean data’ follows suit, reflecting a cultural shift where controlling one’s biology is not only health-conscious but aspirational.’

The emphasis on visible control extends into aesthetics, where minimal pores, low inflammation and glowing skin signify elite self-management. Healthy beauty is the new perfectionism. ‘Clean girl is a modern ‘I woke up like this’ but backed by money, enhancements and white privilege. It leans into eugenics and white supremacy, and we don’t even see it because it’s so embedded in culture,’ says beauty culture expert and author of UGLY, Anita Bhagwandas.

Global Driver
Evolving Demographics

Digital tools and longevity culture are reframing beauty through a bioperformance lens, encouraging measurable self-optimisation and turning skin into a status symbol – entwining appearance with internal health and social capital

The Blue Flower Syndrome by Benze de Ream highlights the invisible political infrastructures behind algorithms. Photography by Nicole Marnati, The Netherlands

Control Culture

While aesthetic autonomy is growing through tweaking, filtering and enhancing appearance, other freedoms are shrinking – from reproductive rights to immigration restrictions and laws policing gender identity – disproportionately affecting women and marginalised communities.

Historically, control over identity has reinforced dominant power structures. Nazi Germany celebrated the blonde, blue-eyed Aryan while erasing identities that diverged from this norm. While the scale differs, signs of identity exclusion and supremacy continue to surface. In Arkansas, USA, for example, Sky News reported a white nationalist group building a gated settlement exclusively for white residents. While not overtly targeting specific groups, this reinforces a narrative of inequality and racial division.

'History shows a recurring pattern. When marginalised groups gain freedoms, those in power push back – politically, culturally and aesthetically,' beauty culture expert and author of UGLY, Anita Bhagwandas tells The Future Laboratory.

In a recent substack post (June 2025), Bhagwandas writes: 'The rise of minimalist beauty has become a palpable symbol of conservative beauty; led by brands whose hero offering is barely there, 'no make-up' make-up, a whisper of colour, a deeply average tinted lip balm. This could be framed as a backlash to the loud looks of the decade before, but it's also a symptom of power snapping back into the hands of those it was briefly wrested from.'

Exclusion and control extend beyond physical spaces and nationalist ideologies – they're deeply embedded in digital environments too. As explored in our Algorithmic Amplification driver, online beauty is tightly controlled: who is visible, celebrated or censored is carefully curated.

Research from July 2025 shows Instagram's filters and algorithms promote whiteness, cultural appropriation and cosmetic surgery ideals. The study states: 'Certain ethnic features are selectively appropriated while others erased, producing a filtered appearance ambiguously 'exotic' but ultimately underscored by its proximity to whiteness.'

Global Driver
Fragmenting Societies

The tension between growing identity agency and rising external control unfolds amid societal fragmentation, as political instability, economic stress and extremism intensify cultural divides and drive new forms of identity policing

The Blandification of Brand

The illusion of choice in beauty is real. Shelves are crowded with hundreds of brands, yet most follow the same playbook, sharing ingredients, manufacturers and familiar aesthetics.

In 2025, beauty and wellness saw some of the sector's biggest acquisitions yet: Elf's £747m ($1bn, €859m) buyout of Hailey Bieber's Rhode; Pepsi's £1.5bn ($2bn, €1.7bn) purchase of prebiotic soda brand Poppi; and L'Oréal's majority stake in clinically backed skincare brand Medik8. While the M&A market may look healthy, consolidation often means tighter control, less creative freedom and more homogenised output.

Instead of innovating, brands imitate others and retailers opt for safe bets. Even with AI and fast ingredient innovation accelerating cycles, true creativity isn't guaranteed, producing what beauty expert Lorne Lucree calls 'AI slop'. 'There's this flood of content and tools that look polished and check all the right boxes but lack real depth or differentiation. It's slop. Technically fine, but soulless.'

The recent start-up boom was fuelled more by fundraising optics than lasting customer value. Founders built to impress investors, not nurture loyalty, with Rhode's sale a prime example, seemingly cashing in on its organically formed community rather than deepening it.

But our New Codes of Value report shows people are tired of constant launches, 'enshittification' of products and empty messaging. Rachel Hirsch, founder of California-based seed venture capital firm Wellness Growth Ventures, tells Beauty Independent that the next wave of winning brands will be led by 'operators as much as visionaries', rooted in community, personalisation and bio-individuality – not blanket claims.

Signs of resistance are emerging as brands form unexpected alliances, from beauty and sport collaborations to alternative spokespeople, such as Urban Decay's partnership with OnlyFans star Ari Kytsya for its Battle the Bland campaign (August 2025). In a landscape driven by speed, scale and low-risk strategies, sameness may feel safe – but it's the fastest route to irrelevance.

Global Drivers
Fragmenting Societies, Climate Change & Resource Scarcity

Beauty brands are prioritising speed, scale and low-risk outputs, leading to copycat formulations and AI-generated trend cycles that favour sameness over substance





Above: Rhode at Sephora, US; Left: Elf Beauty chairman and CEO Tarang Amin and Rhode founder Hailey Bieber, US

'In a beauty and wellbeing landscape driven by speed, scale and low-risk strategies, sameness may feel safe – but it's the fastest route to irrelevance.'

Madeleine Boyd, global senior vice-president of beauty and wellness, Together Group

Insight

A new route for the beauty sector is emerging, one that leans towards subtle provocation, nuance and complexity to encourage consumer curiosity and reflection in an increasingly homogenous landscape

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2030. Insights help brands and businesses to understand and identify the opportunities presented by this trend



Anti-fluency Aesthetics

Beauty's future lies in provocation and strangeness, creating 'aesthetic arrest'. Through distortion, theatricality and hyper-artificial effects, brands and consumers disrupt sameness, spark curiosity and redefine visual and emotional engagement



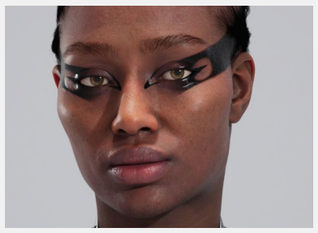
Interpretative Beauty

Future beauty embraces ambiguity, interpretation and subjectivity. Through art, micro-communities and coded aesthetics, brands create layered experiences that sustain intrigue, challenge fluency and transform beauty into cultural and sensory exploration



The Beauty of Origin

Regional beauty and heritage are resurging as brands embrace culturally rooted narratives, local rituals and ethnic aesthetics. Disruptors challenge homogenised ideals, reclaiming representation and authenticity in products, campaigns and fragrance



Stackable Beauty

Migration and digital life fuel hybrid beauty, blending cultural traditions, diaspora identities and subcultural remixing. Brands and creators layer modular aesthetics, creating adaptable, interchangeable expressions across physical and digital worlds



Dynamic by Design

Product innovation combats homogenised beauty by creating dynamic, multi-sensory experiences. From evolving scents to transformative make-up, brands engage consumers, surprise the senses and challenge predictable, uniform expectations in the industry

Anti-fluency Aesthetics

Beauty isn't just about pleasing the eye; it's a visual encounter that interrupts and makes the brain take notice. Novelist James Joyce and writer James Campbell described this as 'aesthetic arrest' – the sudden halt in thought when confronted with something visually powerful.

There are benefits for those brands which view the beauty sector's next role as jolting us out of the digital fog while opening new, even contradictory, ideas of what beauty can be. 'When we're curious, the brain's dopaminergic system kicks into gear… Curiosity makes us feel good about discovering something new,' writes neuroscientist Anne-Laure Le Cunff.

This isn't about historical imitation of the wealthy or high-profile cosmetic flip-floppers like Kylie Jenner. What began as the 'hot mess' renaissance – a backlash against the 'clean girl' aesthetic – has evolved into a spectacle. Brands, creators and consumers are embracing provocation, distortion and strangeness to disrupt beauty's sameness – echoed in exhibitions like Dirty Looks at Barbican (September 2025–January 2026), which explore imperfection and decay as new expressions of allure.

On social media platforms, users are reclaiming wrinkles as canvasses for playful, colourful make-up, calling it anti-Botox or anti-filler beauty. One example is Beetlejuice Lips, a layering of neon and black pigment to create a crackled effect. Elsewhere, artists and models are experimenting with prosthetics, exaggerating silhouettes, as at Martine Rose's spring/summer 2025 show featuring striking prosthetic noses.

In music, Chappell Roan blends theatricality and 'clowncore' make-up, rejecting polished beauty for storytelling, character and raw emotion. 'People in my home town call gay people clowns – that's why I wear my white face… like, bitch, I'll show you a clown,' she explains on Reddit.

This aesthetic now shapes product design, bringing hyper-artificiality to consumers. After creating the lacquered, glass-like skin effect for Maison Margiela's spring/summer 2024 show, make-up artist Pat McGrath sparked cultural buzz around the porcelain finish and launched Glass 001, enabling consumers to recreate the look at home.

As explored in The Synthocene Era, near-human aesthetics provoke the Uncanny Valley repulsion response, but when strangeness is intentional and rich, we enter the aesthetic uncanny – a space that fascinates rather than repels.

> 'When we're curious, the brain's dopaminergic system kicks into gear… Curiosity makes us feel good about discovering something new'
>
> *Anne-Laure Le Cunff, neuroscientist and founder, Ness Labs*



Photographer Gil Anselmi and make-up artist Lisa Michalik collaborated on an AI-assisted beauty shoot. Originally published in Dazed Beauty, UK

‘Fashion’s frequent association with ideas of perfection and glamour have long seen dirt deployed as a powerfully emotive symbol of resistance and liberation’

Karen van Godtsenhoven, co-curator, Dirty Looks at Barbican, told Dazed



Dirty Looks
Models mud wrestling at Elena Velez’s spring/summer 2024 presentation. Photography by Jonas Gustavsson for The Washington Post via Getty Images. Part of Dirty Looks at the Barbican, London, UK

Interpretative Beauty

Ambiguity offers friction in a world over-saturated with literal, over-explained content, where we've become more visually literate.

The beauty culture of tomorrow will embrace interpretation, slow perception and lean into subjectivity, lore, fandom and micro-coding to sustain intrigue – an approach inspired by avant-garde art, which creates space for layered engagement.

In collaboration with Waste Yarn Project, Wallpaper contributing editor Dal Chodha transformed fashion show notes into knitwear, turning subjective observations into poetic garments. 'I think as all of us are becoming so literate in the way that we read images, it really throws up some bigger questions about the point of writing,' says Chodha.

This shift towards opacity is not limited to visual or tactile arts; it's also taking root in beauty, especially fragrance. Brands are moving away from traditional scent descriptions, collaborating with poets or artists to explore fragrance as an impression or gesture – from Molton Brown and punk poet John Cooper Clarke to Bottega Veneta and Chinese poet Yu Xiuhua – or Aesop's synaesthetic collaboration with Jack Coulter, translating scent into a visual abstraction.

These artistic approaches aren't limited to objects, they're transforming the ways we experience beauty in real life. In March 2025, New York gallery Lubov became a 48-hour salon where artists, gallerists and musicians styled hair instead of hairdressers, framing styling as artistic expression rather than a routine service.

Could fluency and literacy be undermining the essence of beauty? As Pixel Flesh author Ellen Atlanta says: 'I avoid naming certain trends because once mentioned, they take hold… Now, I'm interested in moving beyond constant discourse that reinforces limiting ideas about how women's bodies should be seen.'

Some things may be better left unspoken, for wellbeing and intrigue.

This appetite for opacity is echoed in the rise of micro-communities – digital enclaves that trade in insider languages, symbols and visual codes. 'TikTok's algorithm has created incredibly specific beauty micro-communities. Cottagecore enthusiasts exist separately from Y2K revival fans, each with distinct aesthetic codes,' explains Anna Kellum, senior vice-president of beauty and wellbeing UK at PurplePR.





Above and left: Photography by Taryn Segal. Courtesy Lubov, New York US

'I avoid naming certain trends because once mentioned, they take hold… Now, I'm interested in moving beyond constant discourse that reinforces limiting ideas about how women's bodies should be seen'

Ellen Atlanta, author, Pixel Flesh

in a sea of violet hues
you stand fleur in hand radiant
grace and light follow your gaze

Interpretative Beauty
Glossier partnered with Random Studio to launch its Fleur fragrance with an AI-driven pavilion that analysed visitors' expressions and posture, translating scent responses into poetry to be interpreted through a different sensory lens, France

‘Traditional gourmands rely on vanilla and caramel associated with Western baking. We turned to Southeast Asian ingredients to stretch the category’

Phway Su Aye and Susan Wai Hnin, founders, Gabar





Above and left: Cécred Protection Collection, US

The Beauty of Origin

The internet promised broader exposure to diversity, yet regional representation – a key element of vibrant beauty culture – is fading faster than expected.

Many feel pressurised to alter features to fit narrow ideals, with culturally significant traits like nose shapes often casualties of conformity. Supermodel Bella Hadid tells Vogue: ‘I wish I had kept the nose of my ancestors. I think I would have grown into it.’ Professor Meredith Jones notes that nose jobs often bring regret because people feel they’ve lost a connection to their heritage.

Creative community Diet Paratha highlights how ethnic features remain excluded from mainstream media. ‘Celebrities like [Lady] Gaga might get praised for strong profiles, but that rarely extends to recognisably ethnic features, especially those that can’t be easily tweaked or commodified,’ they say.

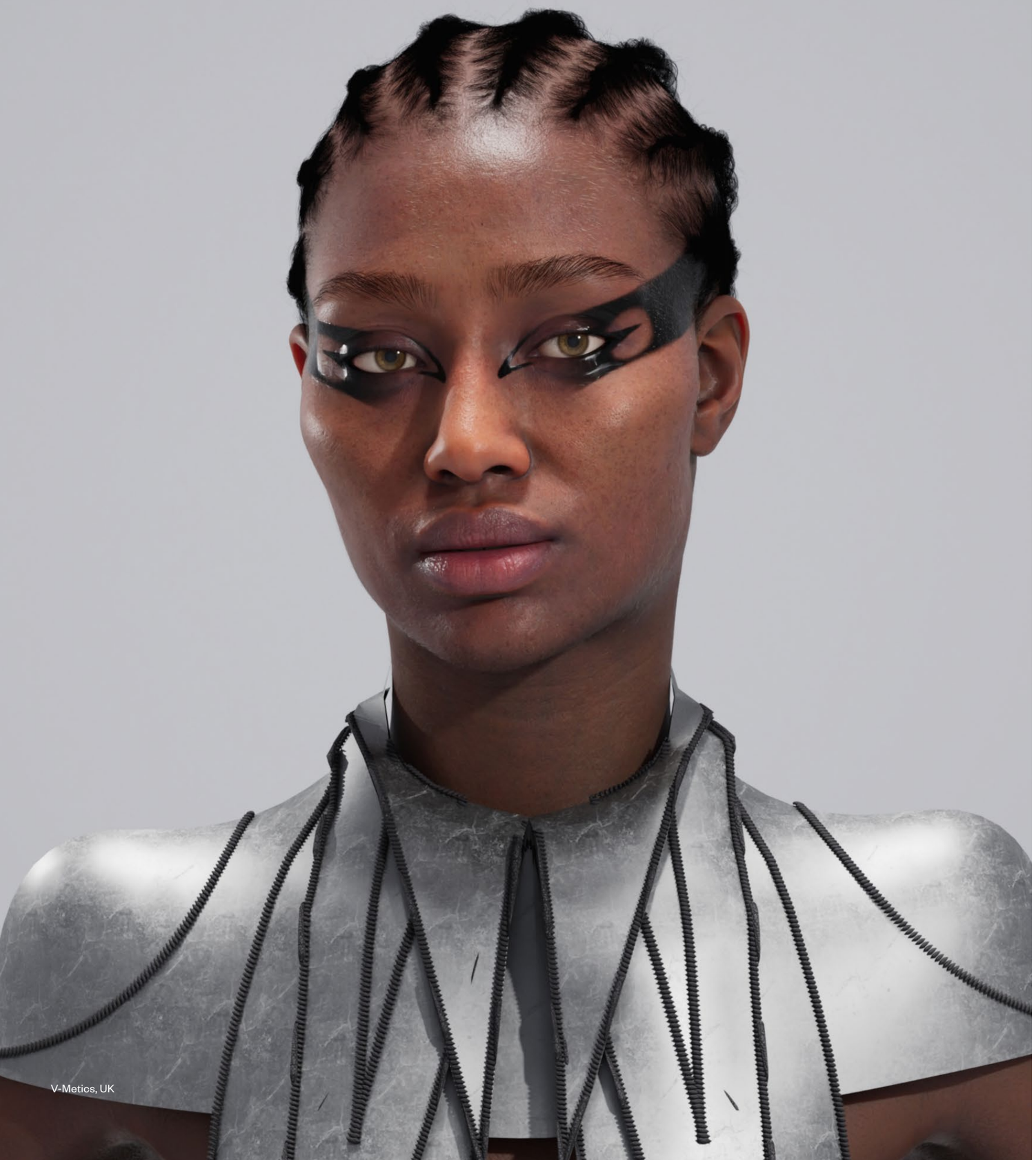
Rather than recycle globalised tropes, disruptors are reclaiming local cultures, rituals and aesthetics.

Brands are responding with culturally rooted campaigns. Beyoncé’s haircare brand Cécred launched A Deeper Understanding of Hair (April 2025), a documentary-style exploration of hair’s emotional significance through six women’s lived experiences. ‘The narratives gaining traction are those rooted in emotional authenticity and lived experience,’ says Purple PR’s Kellum.

Regional fragrance powerhouses are gaining visibility. Arab brands like Lattafa, Armaf and Afnan are trending in US searches, according to Market Defense, while India – producing nearly half the world’s fragrant raw materials – is finally being recognised, as highlighted in our I-Beauty: The Next Beauty Powerhouse report.

Elsewhere, The Egyptian Museum’s Scents of Ancient Egypt Through the Ages (December 2024) explored perfumes’ historical roles via VR, while Southeast Asia’s Gabar redefines regional gourmand fragrances with its Deities collection. ‘Traditional gourmands rely on vanilla and caramel associated with Western baking,’ founders Phway Su Aye and Susan Wai Hnin tell The Future Laboratory. ‘We turned to Southeast Asian ingredients to stretch the category.’

Community-led scent movements like TikTok’s Black Girls Smell Good celebrate Black olfactory identity, showing scent’s growing role as personal and regional expression.



V-Metics, UK

Stackable Beauty

As migration accelerates – with 281m migrants recorded in 2020, according to UN World Migration 2024, beauty is entering a new era of hybrid expression, reshaping cultural exchange and aesthetic codes.

This cultural blending gives rise to stackable beauty, where traditions, techniques and references can be layered and interchangeable. It's about cross-cultural influence, diaspora identity and subcultural remixing. We've seen this in music, with British singer Jade Thirlwall infusing Arab references into UK musician Stormzy's track Backbone in a nod to her Yemeni and Egyptian heritage.

In beauty, creators like Mei Pang express Malaysian-Canadian roots through avant-garde artistry, while Black women are redefining the alt scene, blending goth and punk aesthetics with Afrocentric flair (source: Dazed).

Beyond identity, some cultures are remixing regional approaches to address geographical challenges. India has become the third-largest K-beauty market after South Korea and the US (source: Tracxn). Korean clinic KorinMi, which opened in Delhi in 2024, offers treatments tailored to India's climate and skin concerns while retaining Korean dermatological rigour.

Hybridisation isn't confined to geography. As lives increasingly straddle physical and digital worlds, consumers and brands are experimenting with layered, modular, interchangeable selves. Identities are no longer anchored solely in place – they can be rebuilt pixel by pixel, adapting to context, audience and platform.

Innovators like beauty futurist Dr Alex Box are creating tools to support this evolution. 'I use the term 'Identity Designer' to describe creative practice developing identity through form, function, personhood, aesthetic, ethos and psychology. Designing identity traverses both physical and digital. It communicates through human and post-human form,' she explains to VML.

Earlier this year, Box launched V-Metics, 'the world's first intuitive cosmetic software', capturing real-world precision while digitally preserving human touch.

For some, blending worlds isn't appealing. Instead, they cultivate distinct identities for each environment, a phenomenon reflected in the rise of Digital Doppelgängers.

> 'We've entered a phase where our digital and physical self are becoming inseparable. They're one continuous loop, constantly influencing and amplifying each other'
>
> *Mathilde Friis, co-curator, Virtual Beauty at Somerset House*

Dynamic by Design

Product innovation has become a focal point in the debate over homogenised beauty. Many of today's beauty experiences under-stimulate our senses, leading to predictable expectations and diminishing emotional impact.

Some innovators are responding with products that evolve – whether in scent, texture or appearance – surprising and engaging consumers while breaking free from the sameness that has defined the industry.

Static, unchanging scents, for example, can cause olfactory fatigue, where the brain stops registering a fragrance altogether. New technologies are designed to counter this.

Estée Lauder Companies and start-up Exuud have developed a smart fragrance delivery system that releases aromatic molecules in controlled bursts, inspired by the way flowers emit scent. This precision preserves delicate top notes and prevents desensitisation. Olfactory scholar Pamela Dalton explains: 'Our brains are optimised to detect changes in scent, making this technology a breakthrough in sustained sensory experiences.'

Similarly, Givaudan's Myromi offers a hand-held device that locks scent to the skin in a microgel, releasing it gradually to enrich the wearer's interaction with perfume.

The wider beauty field is facing a similar challenge. Categories like skincare, make-up and cosmetic enhancements are increasingly merging, leading the industry to essentially consume itself, or what could be defined as 'autocannibalisation'. This drives homogeneity in product innovation. Take Isamaya Ffrench's Hyalurolip, for example; it not only mimics the effects of lip filler with hyaluronic acid for a plumped, glossy finish, but also visually references the cosmetic procedure itself.

Breaking this cycle requires truly dimensional, dynamic product innovation. That is the mission of The Unseen, founded by material scientist Lauren Bowker. 'We explore imaginative ways to redefine what the products we wear can achieve,' the brand explains. 'From transformational hair colour to first-of-a-kind make-up innovations, we create products that change what's possible – sparking conversations, subverting expectations and revealing ideas hiding in plain sight.'





Left and above: Isamaya Hyalurolip, UK

'We create products that change what's possible – sparking conversations, subverting expectations and revealing ideas hiding in plain sight'

The Unseen

Foresight

As digital and biological tools transform appearance, identity and concepts of beauty, society encounters accelerating aesthetic arms races, socially coded looks, and pressing questions about authenticity, ethics and the future evolution of humanity

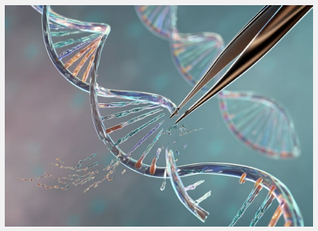
What is Foresight?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergences or developments



The Illusion of Self

Post-pandemic digital life and AI hyper-realism distort self-perception, intensifying identity crises. Counter-movements like no-mirror practices and perceptual experiments challenge curated appearances, encouraging authenticity, self-acceptance and reconnection with unfiltered identity



Acceleration Economy

As access to beauty treatments grow, the race for distinction intensifies, pushing aesthetics to extremes and sparking urgent ethical and social questions about beauty and inequality



Aesthetic Advantage

Beauty signals status, beliefs and ideology, reinforcing social hierarchies. Political, fitness and wellness aesthetics influence partner choice, creating potential genetic clustering and narrowing diversity, with profound societal and cultural consequences

The Illusion of Self

Society is facing a deepening identity crisis. Post-pandemic, people continue to experience Zoom Face – distorted self-perception from constant self-viewing on digital devices. Research from February 2025 cited by PLOS One shows that 'extended time on virtual meetings may exacerbate negative perceptions of self-image, as well as concerns of critical evaluation'.

These pressures are intensifying as AI-driven hyper-realism further threatens authenticity, a topic we explored in The Synthocene Era.

Pixel Flesh author Ellen Atlanta reveals troubling behaviours among people as young as 13 from her recent charity work. 'One girl told me: 'I don't go outside after school any more because I don't want people to see my real face.' She's so attached to her online self that showing her real face feels like a visual stain on the world.'

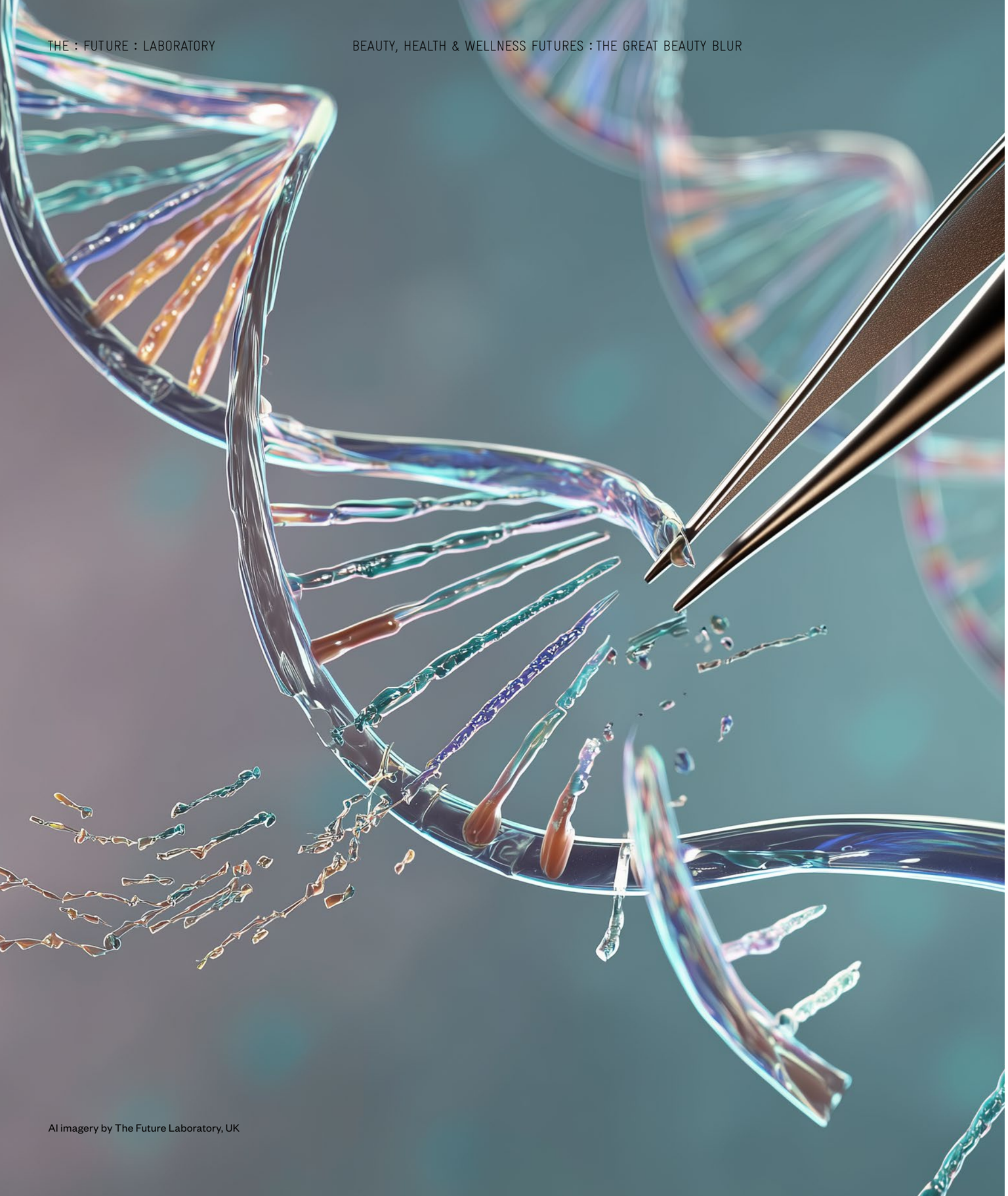
Perception is entirely distorted. Even outside the digital world, the self you see is not necessarily how you look. John Walter's True Mirror project challenges the illusion of conventional mirrors. Using two front-surface mirrors joined at a right angle, the device eliminates the lateral inversion seen in standard mirrors. As Walter notes: 'Most of us have never seen ourselves as others see us. We have no idea what we really look like.'

A recent film at the Virtual Beauty exhibition imagines a future in which internal perception and external appearance are permanently disconnected. The Product is YOU™ envisages brain-computer interfaces that project idealised versions of ourselves directly into our minds, while others perceive only our curated external appearance.

So, do brands and businesses have a responsibility to mediate perception?

As intuitive health practices gain momentum, counter-movements are pushing back against identity distortion. Once viral, the 30-Day No-Mirror Challenge is returning, encouraging people to separate self-worth from appearance and reconnect with their unfiltered selves – a powerful example of re-centring culture on who we are, not how we look.

AI imagery by The Future Laboratory, UK



AI imagery by The Future Laboratory, UK

Acceleration Economy

Beauty has long been a rare commodity tied to social status and class; widespread accessibility inevitably dilutes its value.

'Once the masses adopt the look of a special person, that person changes it because they don't want to be associated with the masses. The masses can never keep up… That language is attached to class,' Professor Meredith Jones tells The Future Laboratory.

As trends become accessible, elites constantly shift their aesthetics to maintain distinction. Shape-shifting has become the ultimate symbol of wealth, yet even this is increasingly within reach of the masses.

Quick-fix treatments, instant beauty products and medical innovations accelerate the process. On Prime Day 2025, searches for 'Instant Face Lift Cream' rose 569% year on year, with over 160 products competing for visibility on Amazon. Consumers want results, and fast (source: Market Defense).

Reflecting this rapid acceleration, Kish Lal, contributor to Dazed Digital, observes: 'Now that these procedures have become more financially accessible – whether that's by scoring a deal on Groupon or by flying to Turkey – the aesthetic is no longer a status symbol.'

This accessibility is eroding traditional status distinctions and fuelling a perpetual cycle of aesthetic 'arms races'.

'We're driven to further and further extremes because the goalposts keep moving and those at the top want to stay apart from 'common people',' notes Ellen Atlanta.

As elite looks become attainable, temporary and permanent interventions escalate. Gene-editing technology CRISPR, projected to reach £9.53bn ($12.78bn, €10.94bn) globally by 2032, according to Verified Market Research, could allow individuals to permanently alter physical features from birth or early adulthood.

This raises ethical, social and psychological questions about self-perception, inequality and the limits of body modification. Should the industry consider new ethical frameworks?

> 'Once the masses adopt the look of a special person, that person changes it because they don't want to be associated with the masses. The masses can never keep up'
>
> *Meredith Jones, professor, Brunel University London*

Aesthetic Advantage

Beauty is rarely neutral. Our appearance signals status, beliefs and the social circles we belong to, reflecting not just personal taste but also social positioning.

As seen from 2024 and continuing to the present, beauty styles are increasingly reflecting political ideologies. In the US, for example, conservative aesthetics – described as 'clean', disciplined looks often associated with Pilates, according to The New York Times – contrast with liberal beauty codes, portrayed as more 'anxiety-riddled'.

These visual cues convey superiority within social groups, making beauty deeply hierarchical.

This isn't entirely new. Religion, lifestyle and fitness have long signalled moral and social standing. Anita Bhagwandas, beauty culture expert and author of UGLY, tells The Future Laboratory: 'There's this idea of 'muscular Christianity' – where the more ripped and disciplined you are, the closer to God you are. That's where this moral superiority linked to fitness comes from.'

Elite wellness movements are increasingly framed as neo-religions, with figures like Bryan Johnson promoting longevity as a moral and spiritual pursuit, further highlighting the impact of Beauty as Privilege (source: MIT).

The implications are profound, particularly as people start to select partners based on narrow beauty ideals and shared ideologies. Dating preferences already reflect this with liberal and conservative communities increasingly forming distinct dating bubbles.

The Singles in America report reveals that the number of people who are looking for a partner but believe it's not possible to date a person of opposite political affiliations rose from about a third in 2012 to more than half in 2020, with a four percentage point increase in the previous 12 months.

Over time, this could lead to genetic clustering along aesthetic and social lines, reinforcing social divisions and reducing diversity – a stark contrast to the 'fusion cultures' ideal of blending influences across backgrounds.

In this way, appearance and social alignment could actively shape the trajectory of human populations.

The share of people unwilling to date someone with opposing political views rose from one-third in 2012 to over half by 2020

Source: Singles in America report



NikeSkims, US

Strategic Implications

Beauty has become predictable – and predictable is powerless. Brands that embrace layered experiences, cultural storytelling and interpretive aesthetics will reclaim depth, provoke thought and reshape how we see ourselves



Photographer Gil Anselmi and make-up artist Lisa Michalik collaborated on an AI-assisted beauty shoot. Originally published in Dazed Beauty, UK

Strategic Actions

Build subcultural connection

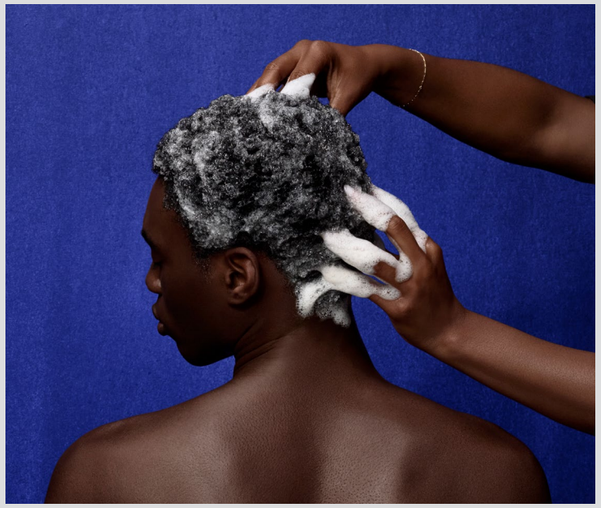
Today's consumers seek experiences that reflect identity, heritage and subcultural affiliation. Brands that translate these insights into culturally rich narratives, collaborative touchpoints and insider-led engagement can strengthen loyalty while shaping meaningful social and aesthetic influence.



Refy, UK

Design with cultural purpose

Collections anchored in cultural heritage, local rituals or diasporic creativity transform products from generic commodities into deeply contextual offerings. Through co-creation and micro-community collaboration, brands can respond to authentic needs, foster emotional resonance and strengthen cultural stewardship.



Cécred Protection Collection, US

Utilise friction as fuel

Be willing to transform the very foundations you are built on. From products to places and people, re-evaluate the roles these assets play in your business future by reviewing them in the context of the challenges ahead, and take steps now to repurpose or recalibrate.



The Unseen Absorption collection, UK

Thought-starters

Hack the algorithms

Use predictable social media patterns to your advantage. Experiment with posting formats, times or content types that the platform favours, but insert surreal visuals, layered storytelling or theatrical effects that interrupt the scroll and spark deeper engagement.



F Club by Fenty Beauty, US

Challenge perception

Design campaigns that make audiences question conventional beauty ideals. Use distortion, theatrical visuals or subcultural references to reveal that perfection is constructed, turning brand interactions into opportunities for reflection and identity exploration.



Gil Anselmi and Lisa Michalik. Originally published in Dazed Beauty, UK

Transcend biology

Re-imagine traits once linked to genetics, such as skin tone, facial symmetry and scent, through technology, AR, AI or adaptive products. Create tools and experiences that let people experiment with identity, self-expression and desirability in entirely new ways.



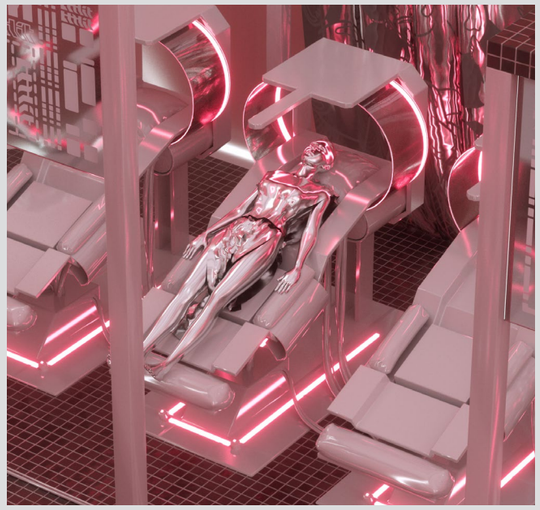
Michael Wallinger Iterative Body Synthesis, 2022. Photography by David Parry, UK

Related Macrotrends

2018

Algorithmic Beauty

As beauty technologies gain in popularity, social media, artificial intelligence and algorithms are beginning to shape a new beauty ideal.



The Salon animation still by Juno Calypso, UK

2022

Accredited Beauty

As consumers seek proof points on product quality, efficacy and sustainability, scientific evidence will drive the healthification of the beauty industry.



111umination Beauty by Aurore Piedigrossi and Tobias Siebrecht, France

2023

Longevity Lifestyles

The health, beauty and wellbeing sectors are embracing longevity as consumers awaken to the possibility of living not only longer, but healthier lives.

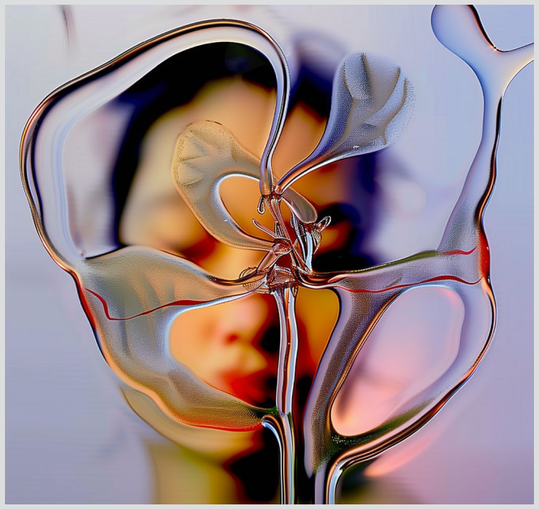


AI imagery by The Future Laboratory, UK

2024

The Synthocene Era

We are entering an era when natural and artificial merge, pushing humanity towards a future in which technology reshapes what it means to be human.



AI imagery by The Future Laboratory, UK

Strategic Worksheets

This strategic worksheet is to help you apply this macrotrend to your business



AI imagery by The Future Laboratory, UK

Prioritisation

Consider the following:

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment

Which driver will have the most impact on your brand/business?

Micro-globalisation | Fragmenting Societies | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Urbanising World



Influence

Consider the following:

How will this trend affect how you fulfil that need?

What impact could these drivers have on the business?

Select two insights that feel most relevant to your brand/business:

How do these insights align with your brand's trajectory?

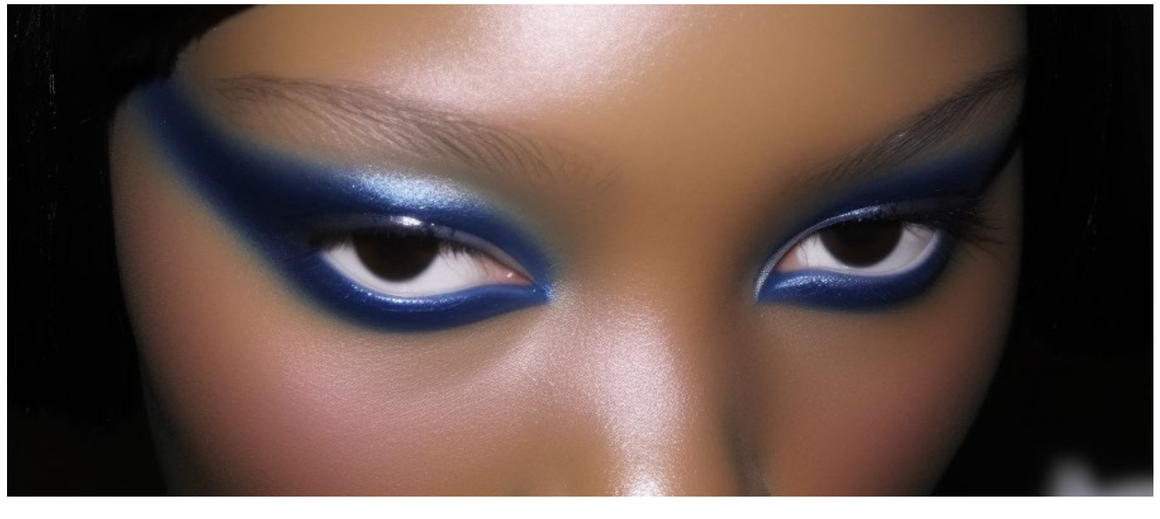
How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?

What is most surprising about this foresight scenario?



Consider how this macrotrend could affect the following pillars of your brand:



01 Culture

What cultural conversations are emerging and who are the tastemakers?

How do we add value to culture?

What will our consumers pay more for in the future?



02 Category

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

Clockwise from left to right: Isamaya, UK; Cécred Protection Collection, US

Consider how this macrotrend could affect the following pillars of your brand:

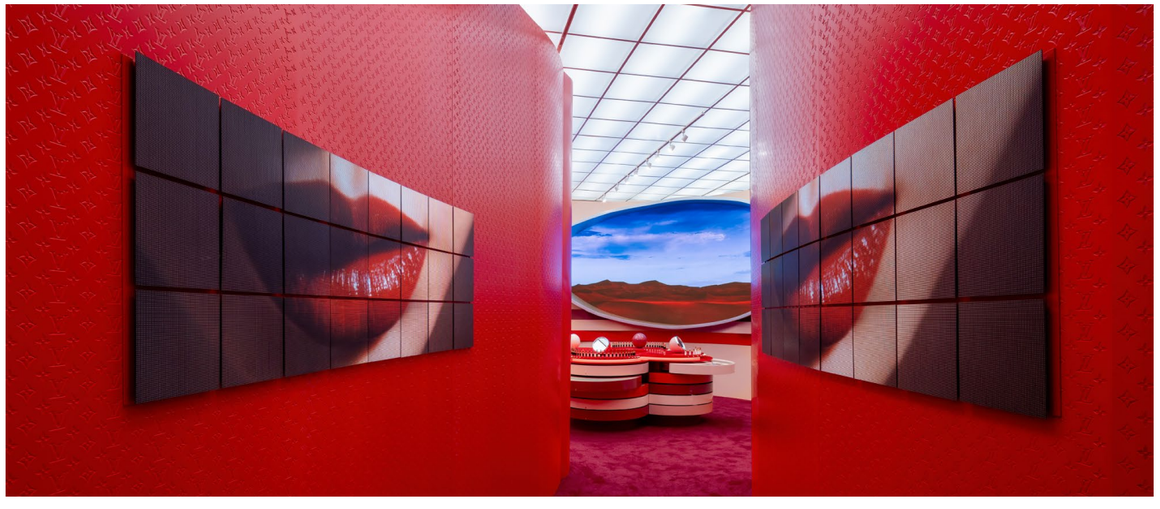


03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?



04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

Clockwise from left to right: The Unseen Absorption collection, UK; La Beauté pop-up by Louis Vuitton, US

Planning

YEAR 1

Over the next 12 months, how will this macrotrend affect your team?

YEAR 3

In three years, how will this macrotrend change the brand?

YEAR 5

In five years, how will this macrotrend change the business?

This report is based on the sector research from The Future Laboratory's trends intelligence platform, **LS:N Global**

Read our latest macrotrend reports:



Market Quad by MVRDV, Taiwan

Future Five

This Future Five 2026 report is a trend briefing designed to help you assess the impact of ongoing change, unpacking the most challenging topics of tomorrow, relevant for today.



Photography by Simrah Farrukh, US

I-Beauty

India is setting the pace for the future of beauty, creating a scalable, culturally intelligent model that blends heritage with science and local insight with global ambition.



Summer Chaos by Db, Norway

Optimised Odysseys

Travel has entered a redefining age in which every element must be optimised, from planning to presence, to deliver truly purposeful, personalised and participatory experiences.

We can also deliver our macrotrends to your business in a number of ways, from on-demand video presentations to strategic workshops and bespoke reports.

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