
Beauty's Skin-Focused Future



Three ways to futureproof your product and marketing offerings.

STYLUS



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Skin-Nourishing Make-Up

Spanning skin-nourishing glossy formulas and youthful sun-kissed pigments, consumers are striving for complexion products exuding health and vitality. Skincare-forward make-up and low-maintenance natural aesthetics are driving a wave of new launches, taking inspiration from catwalk looks alongside wellness-first beauty.



The 'Skinification' of Haircare Continues

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The modern beauty buyer is ingredient savvy, product hungry and ready to jump on board the trends that will help them achieve their goals and be their most authentic self.

Within the beauty landscape, skincare continues to be the most dynamic market, evolving at breakneck speed with the needs of consumers and developments in formulation technology. Now, make-up and haircare are learning from this beauty category leader, adapting skincare formats, claims and caring elements into their own offerings to commercial success.

To help you capitalize on the skincare boom, Stylus experts have outlined three key trends and commercial avenues to explore across three key categories: skincare, make-up and haircare.

Read on to discover the details of these trends, their application across product and marketing, and how they will evolve in future.

Skin Through a Health Lens

With global sales of skincare products set to hit \$181bn by 2025 (Euromonitor, 2022), and skincare-related searches hitting a record high, skincare has become a number one concern for consumers over the past two years.

Skincare Trend

Skin Through a Health Lens

A desire to live well is driving consumer decision-making and product choices across categories, not least skincare. With global sales of skincare product set to hit \$181bn by 2025 (Euromonitor, 2022), and related searches hitting a record high, skincare has become a number one concern for consumers over the past two years. The skin barrier and ingredients such as ceramides, and the microbiome are taking center stage here.

“With cult brands like The InKey List strategizing around typically unsexy skincare concerns such as cystic acne and dry skin, skin health is not only a trendy topic, but a commercial goldmine at a time when the consumer is taking control of their skin journey in such a dedicated way.”

Lisa Payne, Head of Beauty Trends, Stylus



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Skin Barrier Repair

Now one of the biggest talking points in skincare, barrier repair is a commercial gold mine for beauty brands addressing the demand for soothing and strengthening products. In the US, there are 8,500 average monthly searches for ‘barrier repair’ – a growth of 67.9% since 2021 (Spate, 2022). Complaints about skin sensitivity are also on the rise globally, with many consumers now feeling the effects of the overuse of active ingredients and stripping acids.

As consumers become more knowledgeable about the anatomy of the skin and seek products that can heal, nourishing ingredients such as ceramides, will become increasingly popular, and lay the foundations for barrier relief success in products. Brands already leveraging comforting ceramides in their products include Drunk Elephant’s Ceramighty AF Eye Balm, and UK-based Scientia’s Rescue Moisture Barrier Balm.

Skin health is also a strong marketing point for skincare brands, particularly on-pack. New Gen Z catnip brand Byoma is capitalizing on the growing trend for health-focused skincare. Its entire line is premised on barrier repair – which has existed previously in clinical brand offerings and drugstore aisles – packaging its products in bold color-blocked bottles and celebrating trendy ingredients like ceramides and squalene, reframing skin health in the mainstream for a skin-savvy audience.

Microbiome-First

In a similar vein, consumer interest in the skin’s microbiome – and demand for wellness-inspired skincare and inside-out formulas, show no signs of slowing down. Positioned as a key component of strong skin health, consumers are seeking products that protect the microbiome. Probiotics continue to take center stage here.

Korean skincare brand Axis-Y recently debuted a new brand, Ay&Me, inspired by feedback from more than 1,000 influencers from 68 different countries. The community-led Gen Z brand is focused on a five-probiotic complex, which works to improve the skin’s natural biome, strengthening the skin barrier and promoting healthy, radiant skin.

The dissolving boundaries between health and beauty, and growing awareness of the gut-skin axis present an exciting opportunity for microbiome-first and biotics-skewed brands. Marketers, help consumers make sense of your product claims through education-based engagement that makes the science more accessible.

On average, there are 3,300 monthly searches for ‘skin barrier repair’ in the US, and interest has grown by 92.6% since 2020.

GCI, 2021



Bakuchiol is an oil extracted from the seeds and leaves of the Psoralea corylifolia plant, pictured. © Kosame Beauty 2021

The Menopause Moment

Hormonal skin conditions – in particular, the menopause – are also set to be a focus for brands across the board. Thanks to conversations around women’s hormone health and mid-life gaining momentum, menopause-focused skincare is set to resonate more and more in the coming months.

Throughout the market, brands are creating menopause-specific ranges and products that target the concerns of women in this age group, including Paula’s Choice with its Phytoestrogen Elasticity Renewal Serum, while also encouraging new perspectives on the topic. Synthetic biotech company Amyris has partnered with actress Naomi Watts to create new menopause brand Stripes, which aims to take peri/menopause “out of the shadows”, essentially encouraging consumers to take pride in “earning their stripes”.

Ingredient to watch

Key ingredients catering to this skin health trend must deliver noticeable benefits and treatments, which is why petroleum-derived retinol and its derivatives (retinoids and Vitamin A) are so popular as all-rounders that target multiple concerns such as acne, dullness and fine lines. With a growing number of consumers seeking powerful natural alternatives, interest in bakuchiol – often described as a natural retinol – is increasing.

INCLUSIVITY LENS

Visibility and use of the term ‘melanin-rich’ in skincare has exploded more recently. Brands should consider the unique needs or concerns associated with melanated skin (such as hyperpigmentation) when addressing skin health.



FUTURE INSIGHT

Switched-on consumers regard skin as part of a bigger health and wellness picture, and want skincare that aligns with this idea. Brands need to consider how broader determinants of health – such as hormones, diet and stress – can impact the skin, and create solution-focused products that address them. From a marketing perspective, products reframed and branded using these lifestyle drivers will better allow companies to tell commercially successful skincare stories that consumers can better engage with.

Skin-Nourishing Make-Up

With skincare a priority at every turn, consumers are striving for complexion products that exude health and vitality. From nourishing glossy formulas to youthful sun-kissed pigments, skincare-forward make-up and low-maintenance natural aesthetics are driving a wave of new launches, taking inspiration from catwalk looks alongside wellness-first beauty.

“TikTok, the contemporary barometer for what’s hot and what’s not, can be used as a powerful tool to re-energize existing make-up product categories like blush. It’s a gold mine for brands and marketers looking for fresh and exciting angles based on consumer interests and desires.”

Maya Regan, Beauty Trends Researcher, Stylus



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Gloss & Glaze

Hyper-dewy skin and ultra-glossy lips offer an abundance of innovative product opportunities in this space, where searches for “dewy skin” in the US have grown by 41.9% since 2021 (Happi, 2022). Scottish brand Vieve’s Lip Dew, offers the high-shine finish of a lip gloss with the comfort of a lip oil, tapping into the ongoing skinification of make-up trend.

Complexion products are also being formulated to create a dewy sheer glaze, such as French-American luxury brand Chantecaille’s Sheer Glow Rose Face Tint, which adds a luminous glow to the skin.

SPF Appeal

SPF is increasingly being incorporated into make-up formulations, catering to the growing number of consumers taking a preventative approach to beauty. Speaking to this, Tower 28 Beauty (US) markets a two-in-one tinted sunscreen, which evens redness and soothes UV-stressed skin. The product is made with protective ingredients that thrive in extreme climates, such as prickly pear sourced from Californian deserts, tapping into the healing powers of the environment and consumer desire for nature-based options.

Sun-Kissed Touch

Fresh blush looks from the catwalks and TikTok’s #SunburnBlush trend are driving a wealth of consumers to strive for a healthy flushed glow. Creamy blushes that melt into the skin result in a hydrated, youthful and natural finish.

French make-up artist brand Violette_Fr’s Bisou Blush is a good example of a product catering to this trend. The creamy stick features marbled pigments to deliver a multidimensional wash of colour that adds a true-to-life healthy flush to the skin.

A key opportunity for brands is dual cheek and lip products that help create a diffused anti-precision look. ÅTHR Beauty’s Desert Rose Lip + Cheek Oil Stain produces a warm flush across the cheeks and lips, inspired by shades of the blooming desert.

Google searches for 'lip plumping gloss' (+139%) and 'brow lamination' (+40%) in the US increased year-on-year from 2021-22.

Google, 2022



▲ **Ingredient to watch**

Naturally rich in polysaccharides that bring moisture to the skin, algae extracts help improve the skin's natural radiance and boost hydration and anti-aging benefits. US-based Haus Labs' Atomic Shake Lip Lacquer foregrounds marine algae, an ingredient prized for its eco-friendliness. Abundant in the wild, it is a natural lab-based biomaterial that can be regenerated using little energy and water.

INCLUSIVITY LENS

Shrewd brands are paying attention to skin tone and providing sophisticated colorways that suit a variety of shades. Blush products are now marketed in hues ranging from soft dusty pinks to deep purples and acidic reds for depth and dimension, and 'nude' lip colors go beyond putty pinks and factor in a wider scope of caramel and chocolate shades.



FUTURE INSIGHT

Think skincare-first with your color cosmetics, and make sure that you really promote the skin benefits of your products on packaging and socials. Developers should also apply surprising formats like gels and oils to make-up products that deliver non-sticky but long-lasting and hydrating results, without compromising on color and coverage.



The ‘Skinification’ of Haircare Continues

The use of haircare products as a self-care solution is gaining new focus, and 2023 will catalyze hair’s ‘skinification’ that has been developing strongly over the past few years. Black consumers specifically are turning to their haircare routines as a way to practice wellbeing.

Haircare brands are continuing to take inspiration from skincare when it comes to product development and marketing to a new breed of care-obsessive ‘hairtellecuals’. Products like scrubs, serums and mists are proving to be popular extra steps in the modern haircare routine.

“Haircare has come on leaps and bounds, reinventing itself from a fairly functional two-for-one drugstore category to rival skincare in its nuance, complexity and cult product offering. Packaging and marketing are key to success, with vibrant packaging, social-media-driven lifestyle aesthetics and wellbeing-driven ritualization.”

Lisa Payne, Head of Beauty Trends, Stylus



© JVN Hair 2023

Skincare Product Layering

Haircare brands are diversifying beyond the shampoo-and-conditioner experience, mimicking the skincare category and its complementary product categories.

Hair serums in particular are growing in popularity: online engagement for the search term ‘scalp serum’ grew by 47% from September 2021 to August 2022 (Beauty Pie, 2022). Catering to this demand, JVN, the performance brand from American celebrity hairstylist Jonathan Van Ness, now offers a Complete Instant Recovery Serum. It contains niacinamide to repair and smoothen weak, ultra-damaged, over-processed hair with a silky finish.

Scalp Focus

“Scalp health as hair health” continues to be a key message brands, with new launches centering on nourishing hair from the root. Scalp-specific tools are also growing in popularity. Lanshin, a brand rooted in traditional Chinese medicine, has a Scalp Stimulator made from semiprecious stone jade. Massage formulas also make great accompaniments.

For scalp care, hair brands are introducing the idea of adding an extra step – something commonly seen within skincare. One notable example is Arkive’s Scalp Scrub, which uses chemical and physical exfoliators to help remove product build-up and dead skin cells.

Targeting Black Hair Needs

The Black haircare market – a segment worth \$1.6bn in the US alone (Mintel, 2022) – is also evolving in exciting ways. Signature products and ranges are launching, revealing a myriad of ways that brands can address the different needs of Black consumers and their textured hair.

Calling itself the “athleisure of haircare”, Sunday II Sunday creates products that help maintain textured hair after workouts and between washes. While Bask & Bloom Essentials’ products are designed to combat postpartum hair loss. Tapping into the skinification of haircare, This Hair of Mine, a UK-based luxury brand co-founded by Jamaican-born hair stylist Cyndia Harvey, offers a Scalp Serum formulated with plant-based ingredients, such as apple stem cells to help reduce irritation and soothe the scalp.

The global haircare market is expected to reach \$54.09bn by 2027, growing at an annual rate of 4.03%

Research & Markets, 2022



▲ **Ingredient to watch**

In line with the trends driving haircare and styling products' development in 2023, key ingredients showcase exciting crossovers from the skincare category, especially collagen, which is cropping up in topical products with surprising benefits. British brand SBC Skincare's Hydra-Collagen haircare range is enriched with marine collagen and keratin to help boost scalp health, strengthen hair and encourage lift and volume.

SUSTAINABILITY LENS

Sustainable formats should be considered in new haircare launches, with sophisticated ingredients condensed into waterless solid and bar products that aren't heavy to transport and don't require plastic packaging.



FUTURE INSIGHT

Attract consumers who view haircare as an extension of healthcare and self-care with a commercially tantalising marketing story and hard-working formulas that use science-backed or superfood ingredients for noticeable results.

This insight is a light introduction to Stylus' powerhouse suite of reporting, titled Beauty Product Projections, which deep dives into the six biggest beauty categories: skincare, haircare, make-up, fragrance, supplements and bodycare, pinpointing the most important and profitable trends to explore for new product development, marketing, and brand direction for the year ahead and beyond.

Stand out in one of the most competitive sectors by surfacing the most innovative commercial possibilities that lie in the future.

With eyes on every corner of the beauty sector, we empower our members to adapt their product and engagement strategies to meet the expectations of their future beauty consumers.

We can help your brand do the same.

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