

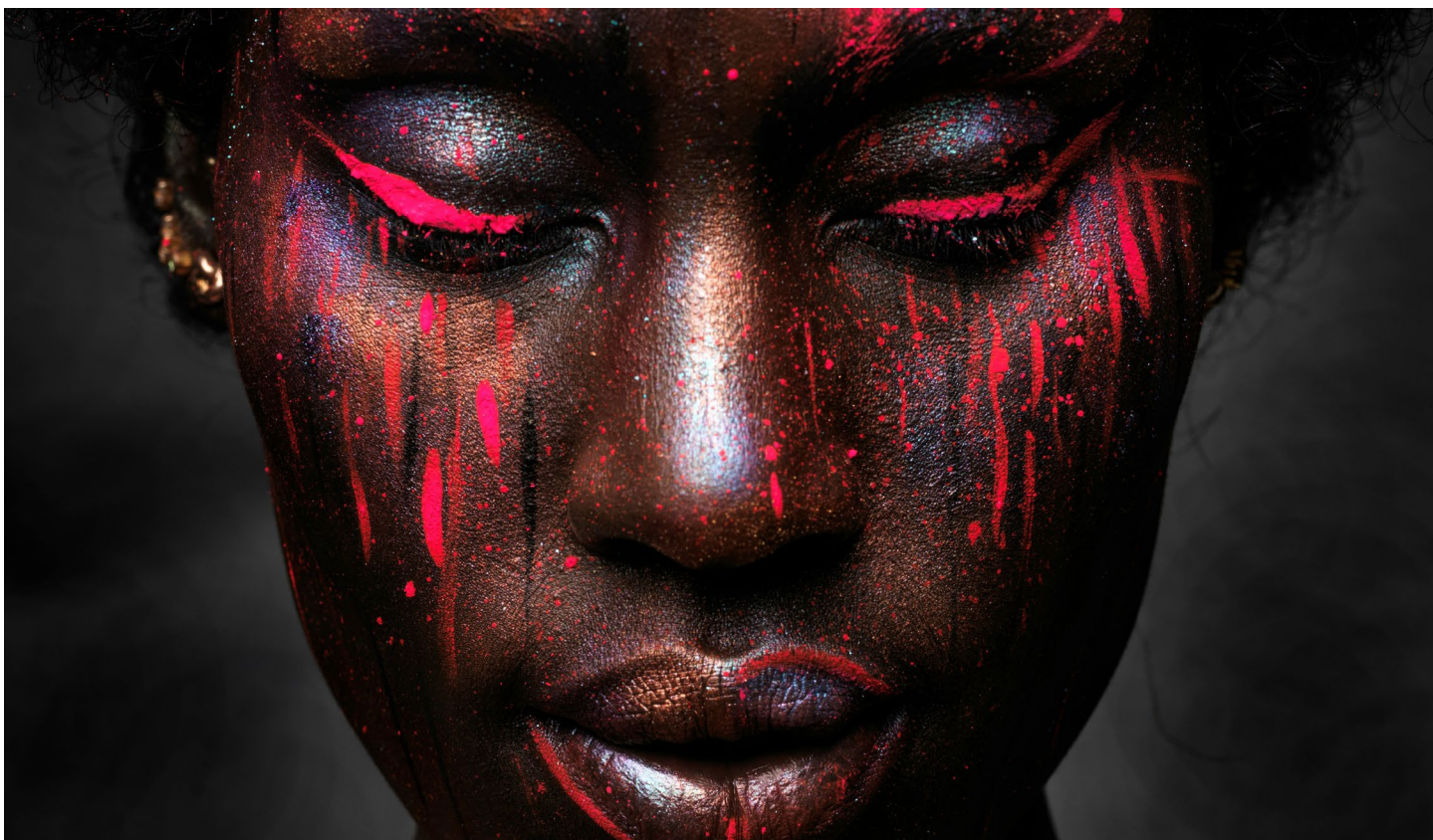
THE BEAUTY ISSUE

Prosumer Report

HAVAS

2025

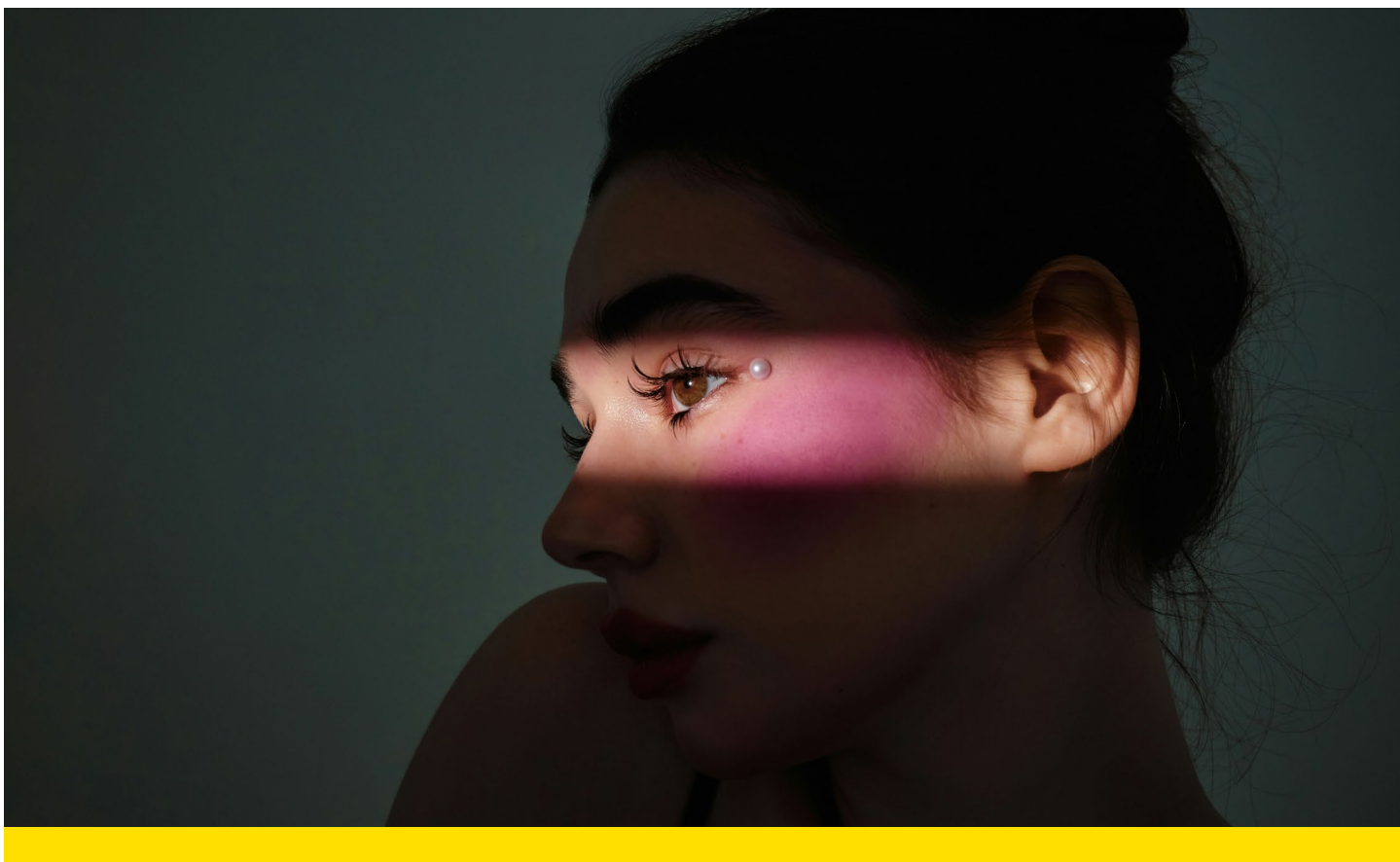




Beauty routines are marketed as acts of self-love—a way to pamper oneself, express one’s individuality, and feel confident. Precious, pleasurable moments for the self and the senses. And yet, they also carry the weight of adherence to societal norms and the expectations of those around us. The way we express ourselves through our physical appearance conveys a multitude of messages and may hint at everything from our political identity to our socioeconomic class, cultural interests, and career aspirations.

Maintaining or enhancing one’s beauty can also involve a substantial financial investment. At a time when TikTok routines are luring in **preteens** and people are running up credit card debt on serums, scrubs, and surgical procedures to optimize their looks, we found ourselves asking: Have these rituals become less about joy and more about obligation?

To find out, Havas Group surveyed 14,500 adults aged 18 and older in 30 countries. We wanted to explore how people are feeling about the pressures to meet societal beauty standards and how these standards may be shifting. What we uncovered is that beauty is more than skin deep; it’s less about vanity and conformity today and more about empowerment, tapping into societal benefits, and meeting one’s own expectations.



“Peak Beauty” Is Off the Radar

Given the **avalanche** of beauty content today—from TikTok tutorials and influencer posts to new brands and celebrity come-ons—it’s tempting to assume that people have grown weary of beauty messaging and are ready to revert to their “natural” states. That’s not the case. While most of our respondents claim to be unable to keep up with current beauty trends, we are not seeing the level of beauty burnout that would persuade consumers to tune out. On the contrary, the industry is **booming**, especially in the Middle East and Latin America. The desirability of prestige beauty products is at an all-time high, and this is not driven purely by luxury consumers. The so-called “**lipstick effect**”—in which people splurge on beauty products

that make them feel good in difficult economic times—is going strong. Case in point: While Kerig’s sales dipped 14% in Q1 2025 amid a downturn in the luxury sector, its beauty division—driven partly by sales of its luxury fragrance house, Creed—saw **sales rise** 6%.

There are too many beauty trends changing all the time; I can’t keep up

56%

(showing Prosumers; % agreeing strongly/somewhat)



FROM VANITY TO VITAL

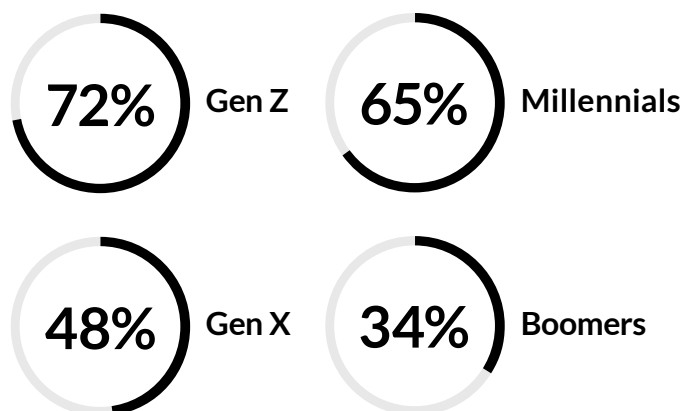
While the industry's allure remains intact, consumers' motivations have changed. Whereas the lipstick effect used to be about escapism and fantasy, it's now more about status and sense of self. Vanity will always play a role in the industry, but beauty is now about much more than that. More than 3 in 4 Prosumers and half the mainstream consider attending to their beauty a "vital need."

Taking care of my beauty is a vital need for me

77% PROSUMERS



55% MAINSTREAM



(% agreeing strongly/somewhat)



ALL ABOUT ME

Beauty is now a global aspiration—and affirmation. It’s less about how you look and fit in and more about how you feel and are regarded. Fewer than 1 in 10 Prosumers regard beauty as an act of conformity or seduction. In sharp contrast, more than 8 in 10 view it as a way to feel good about oneself, and around half see it as an avenue of self-expression.

For me, beauty is synonymous with... (Choose all that apply.)

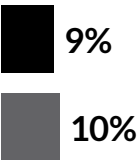
Feeling good about myself



Self-expression



Conforming to standards



Seduction



A waste of time



■ PROSUMERS ■ MAINSTREAM



BEAUTY AS THERAPY

How people look is so intrinsically tied to how they feel that devoting time to one’s appearance is considered an essential form of therapy. Three-quarters of Prosumers say their beauty and skincare routines contribute to their mental health, and 84% consider tending to their appearance every bit as important as caring for their mental health.

Taking care of myself with beauty and skincare brands helps me feel better mentally

75% PROSUMERS



54% MAINSTREAM

(% agreeing strongly/somewhat)

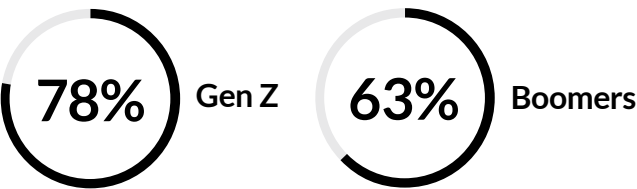
The connection between looking good and feeling good is so strong that virtually no respondents (just 2% of Prosumers globally) consider beauty routines a waste of time.

Taking care of my appearance is just as important as taking care of my mental health

84% PROSUMERS



71% MAINSTREAM



(% agreeing strongly/somewhat)

The study further uncovered three emerging trends shaping the beauty market: the “healthification” of beauty, the pursuit of “pretty privilege,” and evolving standards of beauty.



The Healthification of Beauty

Longevity is in. People don't just want to live longer; they want to live better longer. That means taking care of themselves, starting at an increasingly young age.

HEALTH IS THE NEW WEALTH

Good health is hardly a novel aspiration. In 2024, when Havas surveyed people about their greatest wish for the year ahead, three-quarters chose “good health for me and my family,” compared with just 1 in 5 who chose “to be successful.” That said, being healthy is widely acknowledged as a form of success—and social currency—with nearly all Prosumers (98%) in the same 2024 survey agreeing that they admire people who invest in their health.

I admire people who invest in their health*

98%

(showing Prosumers; % agreeing strongly/somewhat)

**Havas Global Prosumer Report, “The Future of Health Through Food,” October 2024*



THE ERA OF SELF-OPTIMIZATION

Advances in science and an ever-growing array of products and treatments have convinced two-thirds of Prosumers globally—rising to 86% in Brazil—that there are no limits to how healthy a person can be. Consequently, 81% of Prosumers, compared with

56% of the mainstream, say they're on a constant quest for new ways to improve their health. It's all part of our modern culture of self-optimization. And it's a virtuous circle: More than 9 in 10 Prosumers believe the best way to be beautiful is to be healthy. This means that beauty, once associated almost entirely with one's outward appearance, is now closely tied to wellness and wellness products.

There is no limit to how healthy you can be

66% PROSUMERS



55% MAINSTREAM

I'm constantly searching for new ways to improve my health

81% PROSUMERS



56% MAINSTREAM

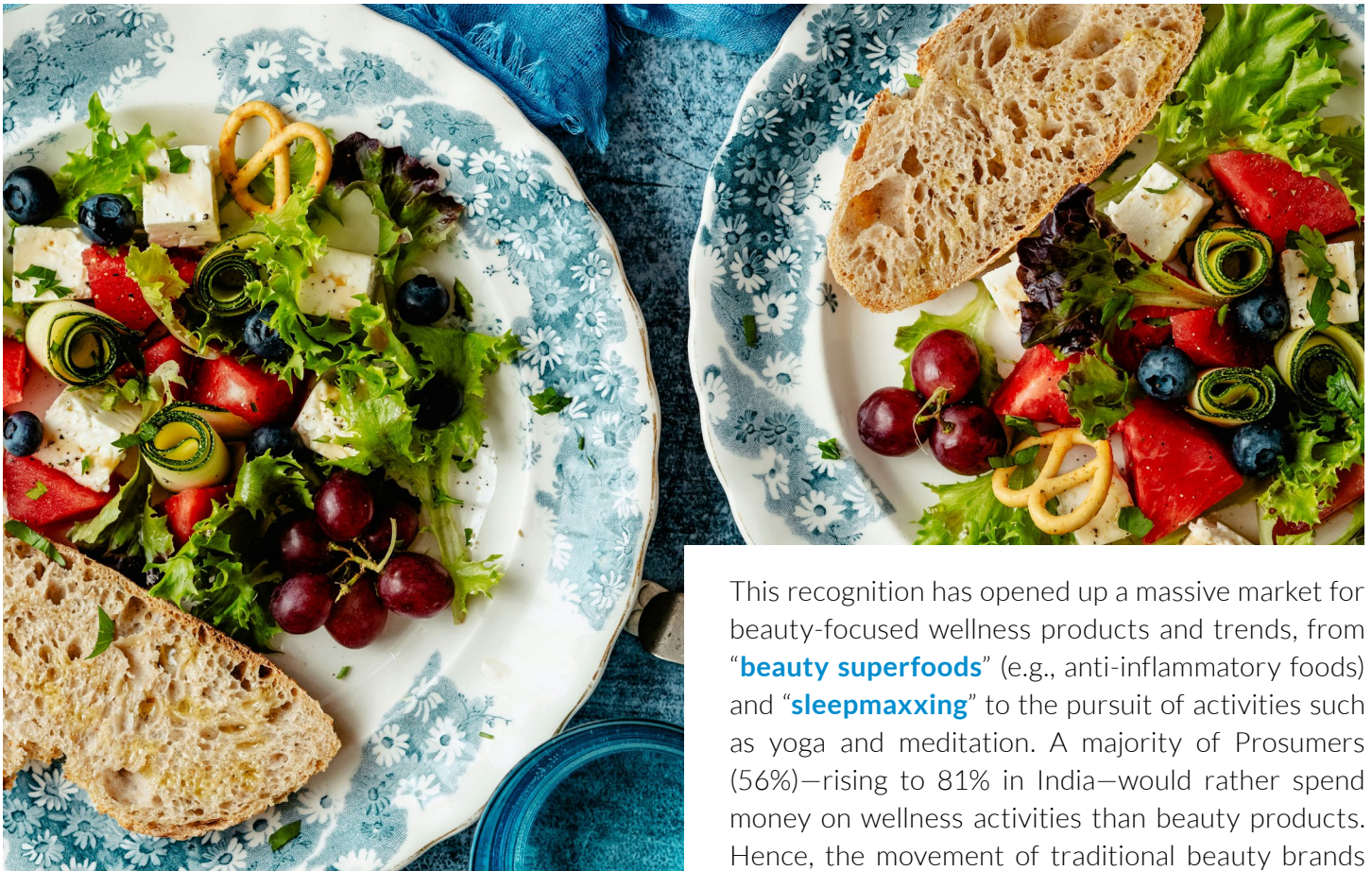
I believe the best way to be beautiful is to be healthy

91% PROSUMERS



85% MAINSTREAM

(% agreeing strongly/somewhat)



INVESTING IN HOLISTIC HEALTH

Beauty routines are no longer just about cosmetic applications. They extend to eating healthfully, exercising, and getting a good night's sleep. People now recognize that each of these habits affects their appearance, from the clarity of their skin to the confidence they project.

Taking care of myself involves...

(Select up to 2 responses.)



(showing Prosumers)

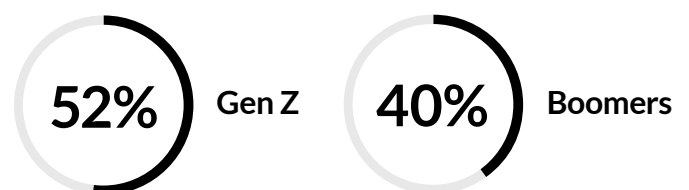
This recognition has opened up a massive market for beauty-focused wellness products and trends, from “**beauty superfoods**” (e.g., anti-inflammatory foods) and “**sleepmaxxing**” to the pursuit of activities such as yoga and meditation. A majority of Prosumers (56%)—rising to 81% in India—would rather spend money on wellness activities than beauty products. Hence, the movement of traditional beauty brands such as **Dior** and **Kiehl's** into spa brands, yoga accessories, and wellness experiences. Estée Lauder has appointed sleep scientist Matthew Walker, PhD, as its first **Global Sleep Science Advisor**. He'll collaborate with the brand to advance its nighttime skincare research and educate consumers globally on the importance of sleep for overall well-being and skin health.

I'd rather spend my money on wellness activities (e.g., spa, yoga, meditation) than on beauty products

56% PROSUMERS



46% MAINSTREAM



(% agreeing strongly/somewhat)



HOW BRANDS CAN CAPITALIZE ON THE HEALTH-AS-BEAUTY TREND

PROMOTE YOUR OFFER AS PART OF A SCIENCE-ORIENTED HEALTH PRACTICE

Rather than tackle beauty from a skin-deep perspective, offer products that enhance quality of life and promote longevity.

Luxury skincare brands such as [Dior](#), [Estée Lauder](#), and [Lancôme](#) are doubling down on their scientific storytelling and employing code words and phrases—e.g., “born from biomedical procedure,” “protein of life,” “cell longevity metabolism”—that speak to the biology of beauty.

EXTEND YOUR OFFER TO INCLUDE WELLNESS EXPERIENCES AND SERVICES

In the U.K., Dior has partnered with luxury train The Belmond Royal Scotsman to offer exclusive three-night [wellness retreats](#) featuring wellness experts, activities such as Pilates, breathwork, and mindful movement, as well as a range of luxury beauty treatments.

Rhode is playing into the beauty-as-physical-health aesthetic by positioning its [Peptide Lip Shape](#) products as a sort of sculpting “workout” to enhance one’s lips. Each of its 11 shades evokes the gym: e.g., Balance, Lift, Press, Lunge, Stretch, Spin, Flex.

A growing number of beauty brands offer spa experiences and retreats. For instance, South Korea’s Sulwhasoo invites customers at its flagship store in Seoul to indulge in a [Zen spa experience](#) featuring its high-end products, as well as traditional Korean formulas and healing practices such as meridian point massage and red ginseng foot baths.

AGE HACKING

More than two-thirds of Prosumers are convinced that science will eventually eliminate the need for a daily beauty routine by providing a permanent solution. In the meantime, an increasing number of people are investing in science-based interventions, such as [IV drips](#) and [microneedling](#). Half of Prosumers—including 70% in China—also consider digital apps “essential” to their wellness. This is leading to crossovers such as the [Gucci x Ōura](#) collaboration.

In the future, I expect science to provide a permanent beauty solution that eliminates the need for a daily routine

68% PROSUMERS



50% MAINSTREAM

Apps are essential to sustain my wellness

50% PROSUMERS



27% MAINSTREAM

(% agreeing strongly/somewhat)



In Pursuit of “Pretty Privilege”

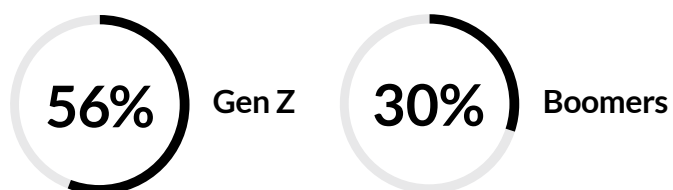
How we look influences how we’re perceived—and treated. It may not be fair, but it’s a fact that few would deny. More than 6 in 10 Prosumers—including 81% in China—believe that beauty is an essential component of social and business success. That’s why many people consider the money they devote to their appearance a smart investment.

I believe beauty is essential for social and professional success

62% PROSUMERS



46% MAINSTREAM



(% agreeing strongly/somewhat)



A GROWTH OPPORTUNITY

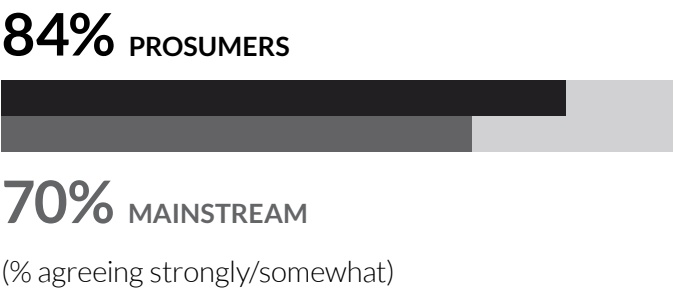
Cosmetics titan Helena Rubenstein famously opined: “There are no ugly women, only lazy ones.” To an extent, that attitude has caught on as more people have come to look at beauty not as a constant but as a variable that can be manipulated with adequate effort (and funds).

For younger people, especially in this time of rising inflation and tight job and housing markets, building one’s “beauty capital” may be more attainable than investing in real estate or financial assets. **Research** has shown that women perceived as less attractive or “poorly groomed” are significantly less likely to be called back for a job interview, while those deemed attractive are perceived as more trustworthy, confident, and competent. One result is a deepened class divide, where those who can afford high-end products and interventions are able to compound the socioeconomic advantages they likely were born with.

INVESTING IN ONE’S OPTIMIZED SELF

Our 2024 Prosumer Report on luxury revealed that more than 8 in 10 Prosumers globally—rising to 97% in France—said they enjoy beauty products because they allow them to be the best version of themselves. It’s all about personal transformation, self-worth, and societal value.

I enjoy beauty products because they allow me to be the version of myself I want to be*



**Havas Global, Prosumer Report: “The Luxury Issue,” 2024*

Makeup and skincare products have become a relatively affordable source of self-empowerment, as much about lifestyle aspirations as aesthetics. Unlike generational wealth or upbringing, one’s appearance is something one can control or at least improve.

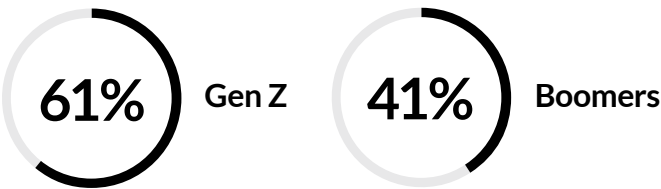
A SOFT SKILL

When we asked respondents how they think about makeup, less than a third of Prosumers said they see it as a way to have fun and express their creativity. In contrast, 70% regard it as a source of empowerment, and 53% said it's a way to boost their self-confidence.

Makeup is...

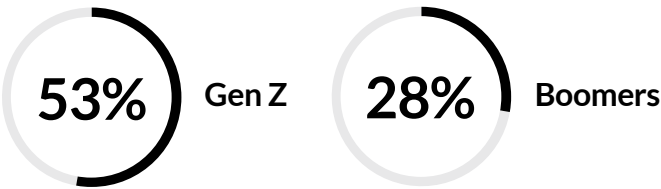
A source of empowerment

70% PROSUMERS



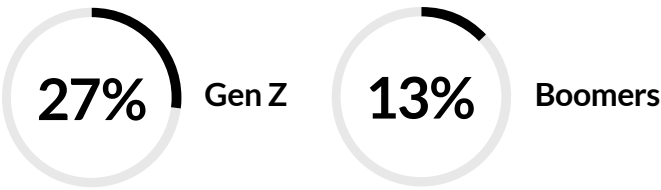
A way for me to boost my self-confidence

53% PROSUMERS



A way for me to have fun and express my creativity

30% PROSUMERS



AN ACCESSIBLE CAPITAL

Most Prosumers surveyed (61%) agreed with Helena Rubenstein’s statement that there are no unattractive women, only women who don’t take the time to maintain their beauty. Interestingly, shifting beauty standards suggest that the best way to look good is to appear as if you’re not trying. The natural look for women is “in,” as we explore later in this report. Of course, as so many “natural beauties” can attest, attaining that look can require a whole lot of work and money. Today’s new “high maintenance to be low maintenance” approach can involve everything from semi-permanent **eyebrow, lip, and eyeliner tattoos** to **red light therapy** and **microcurrent facial massages**.

I think there are no unattractive women, only women too lazy to take care of their beauty

61% PROSUMERS



50% MAINSTREAM

(% agreeing strongly/somewhat)



FROM EXTREME TO EVERYDAY

Cosmetic surgery and other procedures are no longer a privilege of the wealthy elite. Aesthetic “tweakments” such as **dermal fillers** and **HydraFacials** are growing ever more accessible and normalized, with fully half of Prosumers agreeing that it’s OK to undergo “work” to fix physical imperfections. Those so-called “imperfections” don’t even need to be real. More than a third of Prosumers support cosmetic surgery to address insecurities and boost confidence.

I think it’s OK to undergo cosmetic surgery... (Choose all that apply.)

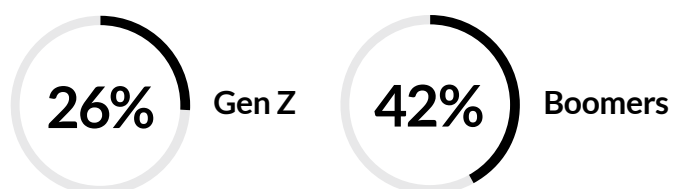
- 50% **To fix physical imperfections**
- 37% **To address insecurities**
- 26% **To limit the effect of aging**
- 20% **For any reason**

I do not approve of cosmetic surgery

23% PROSUMERS



31% MAINSTREAM



The fact that only around one-quarter of Prosumers and Gen Zs disapprove of cosmetic surgery (versus nearly a third of mainstream consumers and more than 4 in 10 baby boomers) suggests this market will continue to grow.

A NEW CLASS DISTINCTION

Beauty and wealth have always been bedfellows, with fashion and beauty trends serving to distinguish the socioeconomic classes. And even in the modern era, with its so-called “democratization” of beauty, more than 3 in 4 Prosumers agreed it’s easier to be beautiful when you’re wealthy. There’s a steep “beauty tax” that encompasses not just high-end products and procedures, but also basics such as good-quality sleep, lower stress levels, and a healthful diet. The trick is to exude a beauty that seems natural, not bought, and for most people, that’s an expensive proposition.

It’s easier to be beautiful when you’re rich

77% PROSUMERS



69% MAINSTREAM

(% agreeing strongly/somewhat)

CROSSING THE INCOME DIVIDE

It’s easier to be “beautiful” when you’re rich, but that doesn’t mean people on more limited budgets are opting out. Almost as many lower-income (56%) as higher-income respondents (63%) consider taking care of their beauty a vital need.

For some people, financial constraints lead to more creative approaches to beauty, including low-maintenance hairstyles (aka “[recession hair](#)”), purchasing knockoff brands (see “[dupe culture](#)”), or, for those with more disposable income, traveling internationally for [lower-cost cosmetic procedures](#).



Taking care of my beauty is a vital need for me (% agreeing strongly/somewhat)





PROMOTE A LIFE-CHANGING VISION OF BEAUTY

People want to know there's a real payoff to the time and money they invest in their beauty routines.

From L'Oréal Paris's "[Because You're Worth It](#)" (coined in 1971) to Sephora's newly unified global tagline "[We Belong to Something Beautiful](#)," beauty brands actively seek to reinforce the notion that beauty is a source of empowerment, inclusivity, and community. Now, we're seeing this extend to messaging regarding career and life success. As part of its "[Go For IT](#)" global campaign, IT Cosmetics has [partnered](#) with Kiva to lend \$2 million to women entrepreneurs by 2030, linking the brand to a boost in confidence. It also collaborates with LeanIn.Org on [workshops](#) designed to support women on their confidence journeys.

FIGHT FOR BROADER ACCESSIBILITY

Products can be pleasurable and indulgent even at a more modest price point.

[The Ordinary](#) positions itself as a no-frills brand that offers high-quality skincare products at an affordable price. The brand's signature minimalist style emphasizes its more democratic approach, and rather than using elaborate titles, its product names transparently list the key ingredients and percentages—e.g., Niacinamide 10% + Zinc 1%, Azelaic Acid Suspension 10%.

We're also seeing a continued embrace of [inclusivity](#), which some attribute to the "[Fenty Effect](#)," referring to the brand's 2017 release of an unprecedented 40 foundation shades (now extended to 50, ensuring virtually everyone can match their skin tone, as founder Rihanna desired). Researchers compiling the 2025 [SeeMe Inclusivity Index](#) analyzed more than 100 beauty brands across six identity dimensions (gender expression, skin tone, age, body size, visible disability, sexual orientation) and found that inclusive brands grow faster than their less inclusive counterparts.

HOW BRANDS CAN CAPITALIZE ON PRETTY PRIVILEGE

As a broader cross-section of consumers seeks to reap the benefits of beauty, brands can make beauty more affordable, accessible, and aspirational.



The Shifting State of Beauty Standards

We're seeing a level of cognitive dissonance between our collective cultural beliefs and individuals' behaviors. In theory, beauty customers are embracing the move toward a less restrictive, more inclusive model of beauty. Even as they celebrate others' defiance of traditional beauty standards, however, few people feel secure enough to defy these standards themselves. Why put one's pretty privilege at risk?

INCLUSIVITY VS. “PERFECTION”

Virtually everyone, including 82% of Prosumers and Gen Zs, agrees that modern society is overly obsessed with physical perfection. That has an impact: Even in the face of the “self-acceptance” trend, fewer than 4 in 10 Prosumers claim not to have physical insecurities.

I think our society is too obsessed with physical perfection

82%*

I don't have physical insecurities

37%*

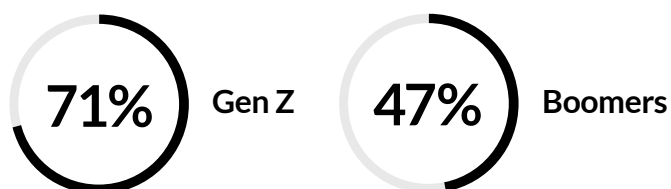
While virtually all Prosumers (93%) agreed that everyone can be beautiful in their own way, two-thirds—rising to three-quarters in India—think that self-acceptance is challenging to achieve in a society obsessed with perfection, especially for younger people.

I believe everyone can be beautiful in their own way

93%*

It's hard to accept yourself in a society obsessed with perfection

65%*



*showing Prosumers
(% agreeing strongly/somewhat)



THIN IS (BACK) IN

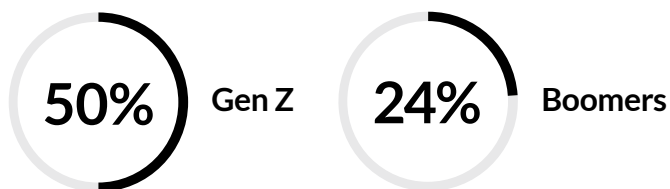
Around half of Prosumers and Gen Zs admit it's difficult to feel good about oneself in the absence of a "perfect" body. And that may soon get harder, as the body positivity movement comes under threat from the [surge in GLP-1s](#). If everyone can now be thin thanks to a weekly jab, what's your excuse for being fat?

It's hard to feel good when you don't have a perfect body

45% PROSUMERS



40% MAINSTREAM



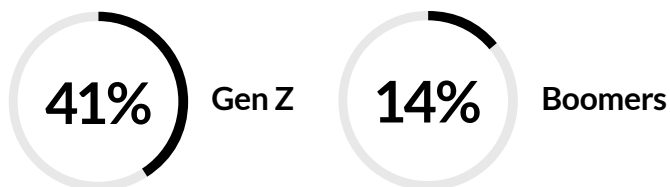
(% agreeing strongly/somewhat)

I think the "body positivity" movement (accepting all types of body weights) has had its time; now everyone can be slim with treatments like Ozempic

44% PROSUMERS



29% MAINSTREAM



(% agreeing strongly/somewhat)



THE OPPRESSION OF WELLNESS

Ironically, the new wellness imperative may have become yet another modern-day pressure. We're now so focused on monitoring and maintaining our well-being that most Prosumers characterize wellness as an "oppressive" societal expectation.

My well-being is more important to me than being beautiful



Wellness has become a new oppressive expectation in our society



*showing Prosumers
(% agreeing strongly/somewhat)



NATURAL AGING VS. ETERNAL YOUTH

The verdict is in: Nearly 9 in 10 Prosumers regard aging naturally not as a sign of “giving up,” but as an act of courage. For the most part, we admire people confident enough to push back against conventional norms. A surprise finding: Going gray is now as acceptable for women as for men.

Aging naturally is...

(Choose one / showing Prosumers)

88% An act of courage



12% A sign of giving up on beauty

I admire men who don't dye their gray hair

57% PROSUMERS



I admire women who don't dye their gray hair

56% PROSUMERS



(% agreeing strongly/somewhat)

AND YET...OUR YOUTH OBSESSION RAGES ON

Compared with a 2012 Havas Group Prosumer study, our 2025 respondents are slightly more likely to consider society youth-obsessed. Most of us recognize the problem, but that doesn't make it go away.

2012: Society has grown too youth-obsessed*

69% PROSUMERS



2025: I believe our society is obsessed with youth

72% PROSUMERS



(% agreeing strongly/somewhat)

**Havas Global, Prosumer Report:*

"Aging: Moving Beyond Youth Culture," 2012

This finding was confirmed by a question asking respondents to choose the age range in which they would like to remain forever. Half of Prosumers selected the youngest option—ages 20–29—while another third chose ages 30–39, a period in life when many people still enjoy the benefits of youth while also having the security of family and an established career.

If you had magic powers, in which age range would you like to stay forever? (showing Prosumers)

50% 20–29 years old

34% 30–39

10% 40–49

2% 50–59

1% 60–69

2% 70 and above



GENDERLESS VS. GENDER PERFORMANCE

Beauty is no longer a “female thing.” Fully half of male respondents consider taking care of their beauty a “vital need.” While this is lower than the women’s agreement rate (67%), it still represents a significant shift from generations past. Moreover, for a growing number of men, a daily beauty routine now extends beyond a basic moisturizer. This is reflected in the fact that more than 1 in 3 Prosumers now believe that men and women should adopt the same beauty products and rituals. Accordingly, the male grooming category continues to grow (up 6.4% in 2024), reaching a **global value** of \$61.3 billion.

Social media has seen a rise in influencers focused on men’s makeup, including **Bach Buquen**, who has partnered with such high-end brands as Armani Beauty, Charlotte Tilbury, and Hugo Boss, and **Matteo Sinet**.

Taking care of my beauty is a vital need for me

67% FEMALES



50% MALES

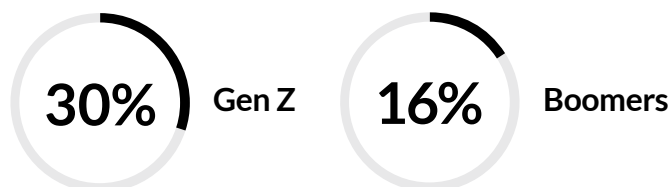
(% agreeing strongly/somewhat)

Men and women should have the same beauty products or routines

35% PROSUMERS



24% MAINSTREAM

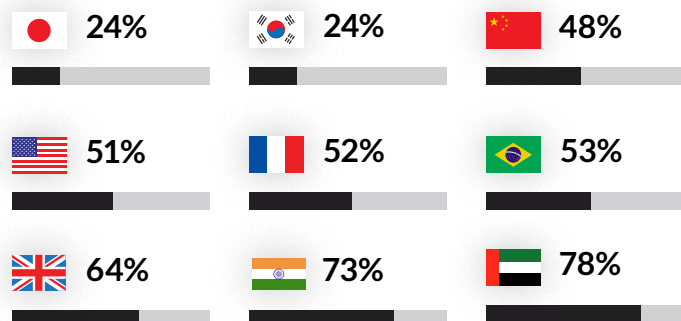
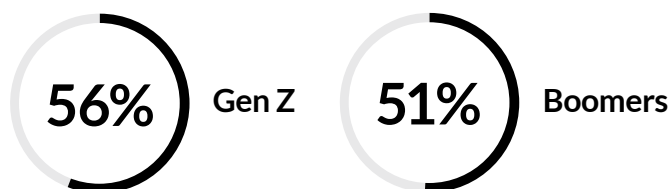


(% agreeing strongly/somewhat)

ARE THE KIDS ALRIGHT?

An issue for many people is the increased pressure children feel to adopt beauty and even anti-aging routines much earlier in life. Half of Prosumers find it shocking that children under age 16 are using skincare and other beauty products. Interestingly, our youngest respondents (Gen Z) were more likely than the oldest (baby boomers) to express shock over this trend. There is also a massive country divide on this issue, with around three-quarters of Prosumers in India and the United Arab Emirates expressing shock (and presumably disapproval), compared with just a quarter of Prosumers in Korea and Japan.

I find it shocking that children under 16 use beauty and skincare products



*showing Prosumers
(% agreeing strongly/somewhat)



THE DRESSING TABLES HAVE TURNED...

While more than a third of Prosumers globally—rising to two-thirds in South Korea—think it's great that some men choose to wear makeup, most Prosumers admire women who do the opposite: go makeup-free. It's two sides of the same coin, with many people wanting

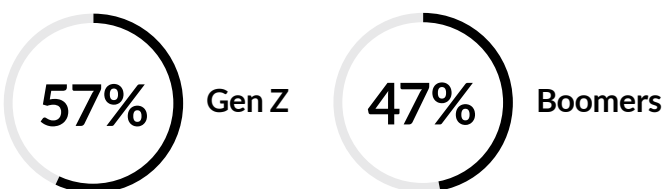
everyone, regardless of gender, to have freedom of choice when it comes to how they present themselves. Gen Z is significantly more supportive of men wearing makeup than are older generations, suggesting the trend will continue to grow.

I admire women who choose to stop wearing makeup

54% PROSUMERS



52% MAINSTREAM



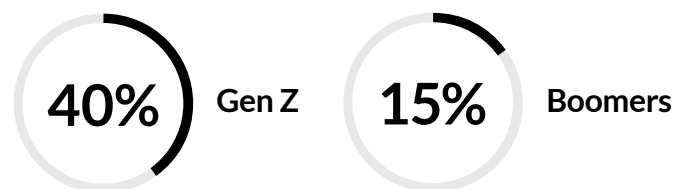
(% agreeing strongly/somewhat)

I think it's great that some men wear makeup

36% PROSUMERS



27% MAINSTREAM



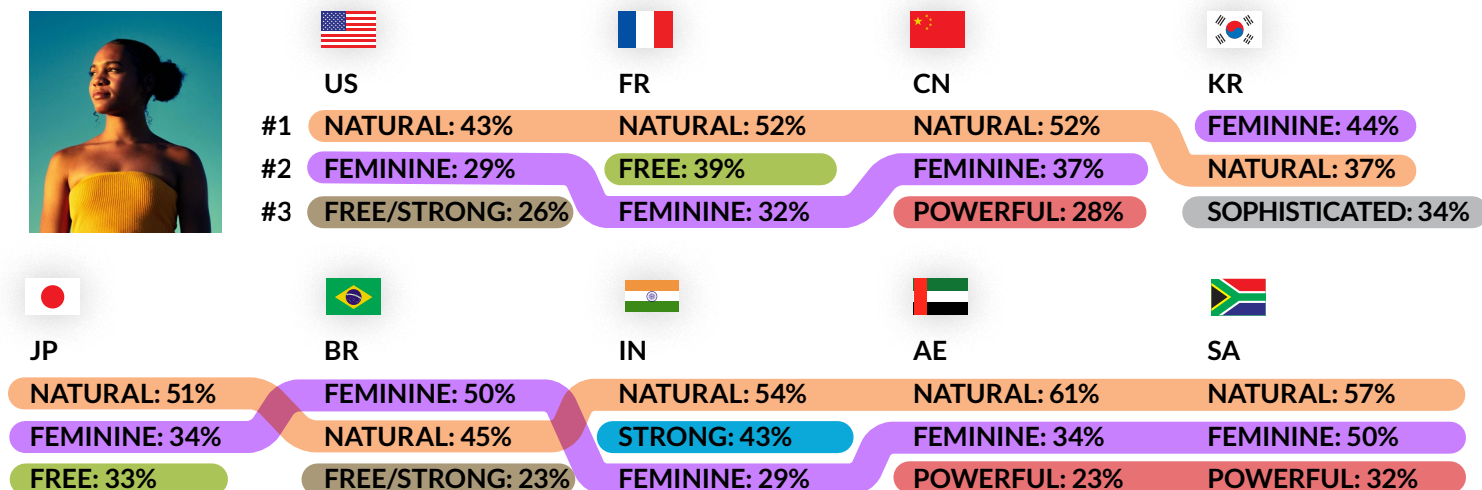
(% agreeing strongly/somewhat)

...BUT THERE ARE LIMITS

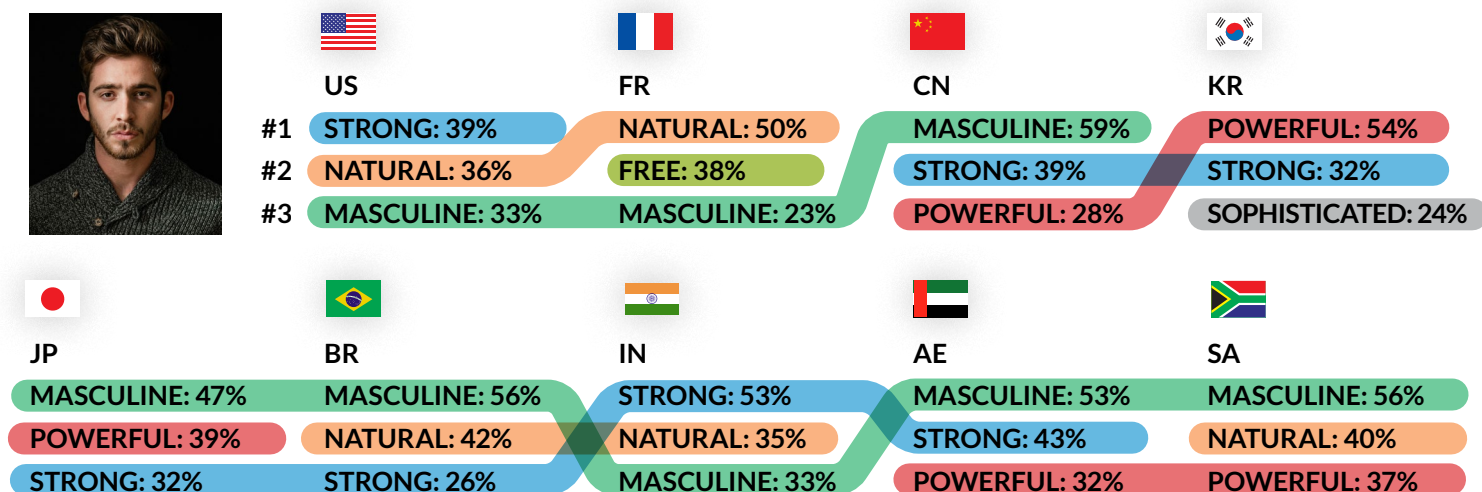
While males and females alike may be slathering on concealer and anti-aging serums, the expected results could not be more different. Perceptions of women's beauty are very much tied to traditional notions of femininity and a natural allure. In stark contrast, male beauty is of the Adonis model—associated with masculinity, strength, and power.

Differing gender expectations become even more apparent when digging into the responses of women versus men. For instance, while 1 in 5 women said a woman is most beautiful when she is powerful, fewer than 1 in 10 men agreed. And while just 7% of women said a woman is most beautiful when she's sexy, 20% of men agreed with that statement. By and large, men still want women to be eye candy for men, while women want other women to feel good about themselves.

I think a **woman** is most beautiful when she is...



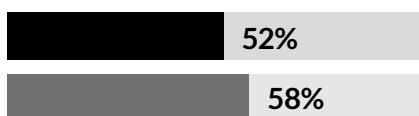
I think a **man** is most beautiful when he is...



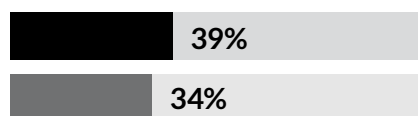
I think a **woman** is most beautiful when she is...

MALES FEMALES

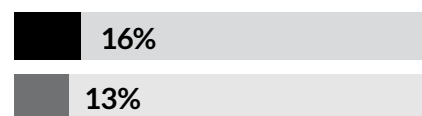
Natural



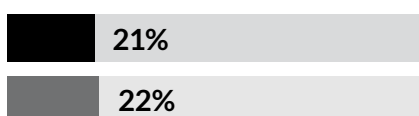
Feminine



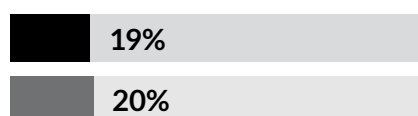
Sexy



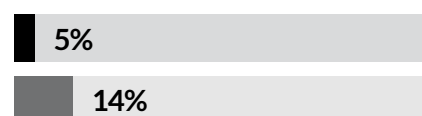
Free



Strong



Powerful



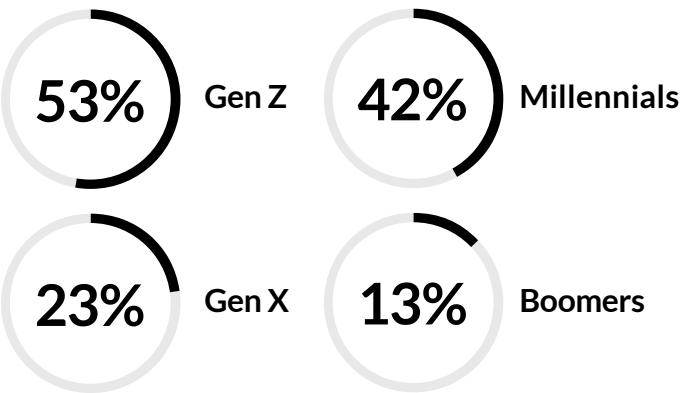
WHO'S TO BLAME FOR UNATTAINABLE BEAUTY STANDARDS?

Throughout the ages, people—primarily women—have been held to exacting (and ever-changing) standards of beauty, with the “ideal” differing slightly across geographic regions and over time. If the pressure seems more intense today, one source bears the bulk of the blame, according to our respondents: influencers and social media. Forty-three percent of Prosumers globally attribute their physical insecurities to this source, compared with 23% who blame movies and TV. Unsurprisingly, members of Gen Z were most likely to point the finger at social media (53% vs. just 13% of baby boomers).

The causes of my physical insecurities are...

- 43% Influencers and social media
- 23% Beauty brands and their ambassadors
- 20% Movies and TV
- 14% My family and friends
- 11% My colleagues
- 5% Other
- 37% I don't have physical insecurities

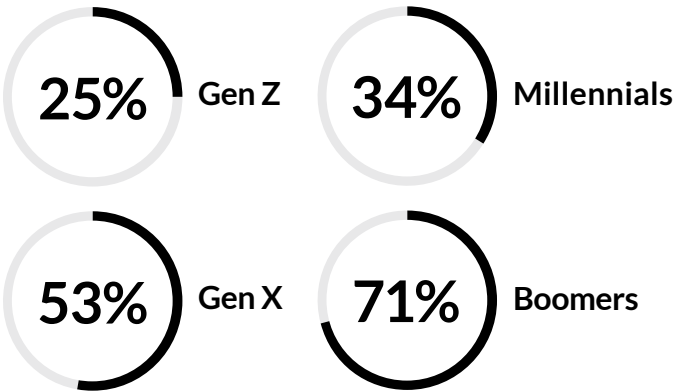
Influencers and social media are a cause of my physical insecurities



NO FRETS LEFT TO GIVE?

Good news for those grappling with their supposed imperfections: There's an expiration date. More than 7 in 10 baby boomers claim not to have any physical insecurities, compared with just 1 in 4 Gen Zs.

I don't have physical insecurities





The Dilemma for Brands

So, where does that leave brands? Prosumers made it clear that beauty is now more about confidence and personal well-being than outward judgments of one's physical attractiveness. And yet, we know that people want to look good—for themselves and for the societal benefits that accrue. And so, while 71% of Prosumers want to see brands challenge beauty stereotypes, a not insignificant 44% don't believe brand messaging that seeks to convince them that they're OK "as is."

I believe beauty brands have an important role to play in challenging stereotypes

71% PROSUMERS



54% MAINSTREAM

(% agreeing strongly/somewhat)

The trick for brands is to offer products and services that make people feel good about themselves and the beauty investments they make. It's no longer about selling sex or perfection or "a brand new you." It's about empowering people with tools that support their vision of their optimal self.

Beauty brands that say "you are beautiful as you are" are being dishonest

44% PROSUMERS





IN A NUTSHELL

1.

Beauty no longer runs skin deep. It's a vital need that impacts how people relate to the world.

2.

Beauty = health = wealth. Physical appearance correlates directly to both physical and mental health. And a person's perceived attractiveness influences everything from access to elite communities to career opportunities.

3.

In challenging economic times, increasing one's "beauty capital" is more accessible than real estate, the stock market, and other traditional investments.

4.

We are seeing a new class divide in which those with sufficient time and money achieve a level of "natural" beauty that sets them apart from—and above—those without the resources to compete.

5.

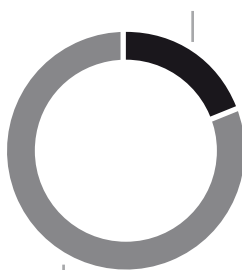
Standards: Choose your side. Beauty is becoming at once more androgynous and more gender divided. More over-the-top and more "natural."



About the Study

In the first quarter of 2025, Havas partnered with Market Probe International to survey 14,500 people ages 18+ in 30 markets: Argentina, Australia, Austria, Brazil, Canada, Chile, China, Colombia, Czech Republic, Egypt, France, Germany, Greece, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Philippines, Poland, Saudi Arabia, South Africa, South Korea, Spain, Thailand, United Arab Emirates, United Kingdom, and United States.

The survey sample was made up of **18%** leading-edge **Prosumers**



and **82%** mainstream consumers.

Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now

Find out more about Prosumer Reports



havas.com/prosumer-reports/

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Prosumer Reports is a series of thought leadership publications by Havas—part of a global initiative to share information and insights, including our own proprietary research, across the Havas network of agencies and client companies. Havas is one of the world's largest global communications groups, bringing together nearly 20,000 people in more than 100 countries. For more information, visit havas.com.

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