

Beauty
in a
world of **flux**













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Beauty in a world of flux

Bianca Heiszwolf
Global Business Leader, Philips Beauty

Welcome to this year's edition of the beauty 'bookazine', which marks our fifth consecutive annual Global Beauty Index, where we ask women from across the world about their attitudes to beauty, how they define it, the role it plays in their lives and the changes they expect to see across the beauty industry in the future.

The 2019 Index findings is based on 12,000 women's perspectives on beauty, from across 12 countries. This year's theme, 'Beauty in a crystal ball' builds on our 2018 Index topic of 'Future beauty', focusing on beauty personalization and how technology is supporting women's daily routines.

Having five years' worth of results to go through has been exciting and allowed us to make some truly meaningful comparisons between past and present beauty trends as well as make informed predictions about how the world of beauty is likely to evolve over the next five years.

I've been closely involved with the research – the results of which are incredibly important to Philips realising its vision to empower women and provide them with efficient, advanced and smart beauty solutions that respond to their personal needs.

While all of the results we've gathered are significant and interesting, here's a taste from this year's findings: globally, three in five women consider themselves to be beautiful (60 percent), while nearly all women believe having a positive mindset (88 percent) and feeling emotionally balanced (84 percent) the most important defining aspects of beauty. These results are reflective of how beauty, health and wellness really are intrinsically intertwined.

The data also reveals that in the next five years women expect to see more use of natural or organic ingredients

in beauty products and, when it comes to future beauty technology, they're most excited about personalised solutions and advice on how to keep their hair and skin healthy (65 percent).

We discuss these results and the Index's many other fascinating findings in the following articles, revealing the huge shifts we're seeing in women's beauty routines, including how technology is helping women take their beauty routines to the next level and shaping the bathroom of the future; how artificial intelligence is empowering women to look and feel their best; the evolution of 'beauty communities'; the trend towards spiritual and meaningful beauty choices; how technology is helping women both style and care for their hair at home; why beauty consumers are making more conscious decisions; and how the beauty industry has evolved overall since 2015.

Philips aims to improve the lives of 100 million women by 2025, helping each one reveal her most beautiful, confident self. The research that we conduct continues to play a big part in us achieving this and in developing our innovative beauty solutions that adapt to each woman's personal needs – whether that's a hairdryer that senses hair temperature and moisture to minimise damage during styling, a facial cleansing device that stimulates circulation to bring out a woman's inner glow, or light-based technology that triggers hair follicles to go into a resting phase, leading to beautifully smooth and long-lasting hair-free skin.

With women becoming bolder, braver and better informed when it comes to their personal care, it is clear that they've never been more ready for innovative beauty solutions that help them live healthy, happy lives.

Enjoy the read and be inspired to feel your most beautiful, confident self!



A woman with voluminous, curly dark hair is looking upwards and to the left. She is holding a clear, spherical smart mirror in her right hand, which is positioned near her face. The background is softly blurred, suggesting an indoor setting with warm lighting.

Tech it up!

How smart, connected devices and apps are helping women tailor their health and beauty regimes to their personal needs.

The advent of the Fitbit more than 10 years ago catapulted us into an exciting new world of personal health and fitness data, allowing us to track our heart rate, sleep patterns and how much we moved each day.

Keeping up with demand

Over the past five years, smart connected devices and wearables have become even more advanced, with a growing number of people around the world using digital apps, software, products and services to help them make better-informed decisions about their health and wellbeing, inside and out.

Today, we're seeing more and more 'at-home' health and beauty devices and smartphone apps designed specifically for women, from ultraviolet trackers to skincare assessors. In fact, market research and analysis firm Frost & Sullivan predicts the ever-growing FemTech (female technology) sector could be worth as much as US\$50 million by 2025¹.

Taking beauty to the 'next level'

Smart technologies are helping women to personalize and take their health and personal care routines to the 'next level', with the ultimate goal of achieving better results. The Philips HairExpert Smart Brush prototype is a great example. Developed by European scientists and based on years of laboratory research, this at-home device features two sensors that measure the outer and inner health of a user's hair, analyzing a combination of elasticity, resilience, shine, hydration and damage to calculate a personalized health score in the Philips hair app. The app uses the information to provide users with a detailed overview of their hair health alongside personalized advice from tips and tricks to product recommendations.

Excitement and possibilities

Interestingly, global research from Philips Beauty reveals 17 percent of women worldwide say they would be influenced to change their health and beauty routine based on advice from a connected device or app. In Turkey this figure jumps to 24 percent and is even higher in India, at 34 percent. Surprisingly, just six percent of women in Germany and eight percent of women in the UK feel the same.

When we look more closely at which connected devices and apps women are most excited about, almost a quarter of women globally (21 percent) look forward to the possibility of having a smart hairbrush that measures frizz, dryness, split ends and breakage, with a further 21 excited about using an app that scans their skin tone to identify and create a personalized foundation. An additional 19 percent are excited about the possibility of an app that scans their skin to identify moisture, pores, lines and wrinkles over time.

Empowering and informing women

Overall, the results indicate that women across the world feel positive about the potential for connected devices and apps to enhance their beauty regimes and are willing to integrate them into their daily routines – the benefits of which are becoming increasingly clear. According to Bianca Heiszwolf, Business Leader Beauty at Philips, "By monitoring and gathering data on aspects of our health and beauty in real time, we can feel empowered to make informed decisions about which products and regimes best suit our individual needs. This helps us to improve our hair, skin, confidence and overall wellbeing – often more efficiently, in the convenience of our own homes and by spending less in the long-term."

The future looks bright

Looking ahead, Philips' global findings reveal that 17 percent of women globally expect to see less interaction with people and more interaction with technology across the beauty industry over the next five years. This rises to 23 percent of women in India and 28 percent in Turkey, reflecting an awareness of the increasing movement towards smarter beauty solutions.

So, what does the future hold for smarter, more connected beauty? It certainly looks bright. While currently at prototype stage, the Philips Smart Mirror concept, for example, offers a taste of things to come. The device, which collects a user's information on everything from their tooth brushing habits to facial skin cleansing, provides unique insights into their beauty routines and then recommends how they can improve them. Innovations like this look set to keep transforming women's beauty routines the world over, empowering them to make more personalized and effective health and beauty decisions so they can feel and look their best day in, day out.

¹<https://ww2.frost.com/frost-perspectives/femtechtme-digital-revolution-womens-health-market/>

Shining a spotlight on...

Perceptions of beauty and use of at-home beauty devices vary across the world. Here's a snapshot of some of the most interesting findings from the Philips 2019 Global Beauty Index in China, Argentina, Turkey, India and France.

CHINA - Tech-savvy and excited about the future

While women throughout the world believe that there are lots of ways to be beautiful, Chinese women believe beauty is more about feeling happy and healthy on the inside than appearance, rating a 'having a positive mindset' as the most important aspect of beauty (91 percent), well above 'looking attractive' (78 percent important).

Chinese women are perhaps some of the world's most conscious beauty consumers – vegan products are significantly more important to them (69 percent) than women globally (45 percent). They also want products that align with their wider values, with 77 percent saying making ethical beauty choices is important.

When it comes to beauty tech, Chinese women are some of the savviest; they're among the most likely in the world to use anti-aging skincare devices (37 percent compared to 16 percent globally), while 35 percent use an electronic facial cleansing brush – the highest percentage in the world. Looking ahead, they're also more excited about future beauty developments compared to most other women globally¹.

ARGENTINA - Beauty comes from positivity and health

Overall, women in Argentina have a truly positive

perception of beauty, with an overwhelming 73 percent of women there saying they consider themselves to be beautiful, compared to 60 percent of women globally. Inner health plays a big part – nearly all (81 percent) agree that when they feel healthy, they feel more beautiful. Significantly, 84 percent of Argentinian women say beauty is something they define for themselves – the highest percentage of all countries surveyed – possibly signalling a shift away from following 'traditional' beauty ideals only.

Almost all women in Argentina (91 percent) believe 'having a positive mindset' is the most important aspect of beauty, compared to 'looking attractive' (54 percent). But just five percent of women there believe that looking beautiful makes them feel confident. This is a low result compared to women in Turkey and China for example, who are three times more likely to say looking beautiful makes them feel confident (18 percent and 17 percent respectively).

When it comes to hair removal, more than half of women in Argentina use an epilator (58 percent). This is significantly higher than the 29 percent of women globally who use the device, signalling a possible growing preference for more efficient, longer-lasting hair removal routines.

TURKEY - A preference for vegan products and IPL hair removal

Similarly to women in Argentina, the majority of women in Turkey (78 percent) consider themselves to be beautiful, compared to 68 percent of women globally. This again is a really positive result and considerably higher than women



¹When asked to rate how excited they are from a choice of 10 possible future beauty developments, full details in the 2019 Philips Beauty Index.



elsewhere, such as the UK and Japan, where less than a third of women say the same.

Interestingly, having a positive mindset is the most important defining aspect of beauty among Turkish women (87 percent important), followed by feeling emotionally balanced (83 percent important). Vegan products are also more important to them compared to women globally (68 percent versus 45 percent) – likely reflecting a preference for products that reflect and support their wider values.

When it comes to at-home beauty, women in Turkey are among the most likely in the world to use anti-aging skincare devices, with 23 percent saying they use one, compared to 16 percent of women globally. Women in Turkey are also embracing more technologically advanced at-home hair removal solutions: 22 percent use at-home laser hair tools and 18 percent use IPL (Intense Pulsed Light) devices at home compared to eight percent for both globally.

Looking ahead, Turkish women believe the future of beauty looks bright – they expect to see the most evolution in the beauty industry compared to women in every other country surveyed.

INDIA - Big on ethical products and anti-aging

Nearly all women in India (92) consider themselves to be beautiful – this is the highest percentage of women who feel this way of all countries surveyed. This is a remarkable result. Just as positively, nearly all women in the country (90 percent) believe that when they feel healthy, they feel more beautiful.

Of all countries surveyed, ethical beauty products are most important to women in India (80 percent). Vegan products are also significantly more important to them (71 percent) compared to 45 percent of women globally, presumably indicating a preference for beauty regimes that align with their personal values and help them live healthily and sustainably.

However, Indian women are some of the most concerned about the lack of representation of different ethnicities and body types in advertising and marketing (62 percent compared to 41 percent globally).

Similarly to women in China, Indian women are leading beauty tech adoption; they're among the most likely in the

world to use anti-aging devices (28 percent compared to 16 percent globally), while 11 percent use a microdermabrasion device – almost double the global average (six percent).

To end on a really positive note, a significant 74 percent of Indian women say they feel freer in the choices they make about their body and beauty routine now than ever before (compared to 59 percent globally) – probably a sign of things to come for women the world over.

FRANCE - All about positivity and personal advice

Almost half of all women in France consider themselves to be beautiful (46 percent). While this is a positive result, it is lower than the 60 percent of women who feel this way globally. Similarly to the four other countries discussed, French women believe 'having a positive mindset' is the most important aspect of beauty, followed by 'being physically fit' (83 percent). Only just over half (59 percent) rate 'looking attractive' as the most important aspect. Together, these reflect an overall healthy perception of beauty among French women.

While around two thirds of women in the country say they feel some type of pressure to always look beautiful (67 percent), around half of them (49 percent) say the pressure comes from them wanting to look their best for themselves. Interestingly, over a third of women in France go to their friends, family and colleagues for beauty advice (34 percent). They're also the least likely worldwide to use social media for advice (19 percent versus 37 percent globally), potentially indicating a preference for more 'personal' beauty recommendations. When it comes to at-home beauty devices, epilator use is particularly high in France with almost half of women there saying they use one (41 percent) compared to 29 percent of women globally. Hair straighteners are the second most popular, with a third of French women using them (33 percent) compared to 41 percent globally.

Looking ahead to the next five years, more than half of French women (62 percent) expect more natural or organic ingredients and fewer chemicals in beauty products, followed by more scientific research and innovative ingredients (36 percent) – let's hope they're right!

The bathroom of the future

Exploring how tech advancements are set to revolutionize the bathroom, having transformative effects on women's health and beauty routines.

Almost every woman begins and ends her day in the bathroom: it's where key parts of a daily routine take place. From brushing teeth, to applying make-up to bathing and washing hair. Yet despite the important role bathrooms play in women's daily lives, they're often the least technologically advanced room in the house.

Smart homes

This is surprising, considering that innovations have played a significant role in shaping other areas of the homes in recent years. Many people have sophisticated entertainment systems in their living rooms and high-tech fridges, coffee machines and microwaves in their kitchens. Smart home technology has also evolved, allowing people to control everything from their lights and heating to security systems, all from their mobile phones. However, despite all of these technological advancements throughout the home, the bathroom has largely stayed untouched.

What can we expect?

Yet, this is all set to change; the bathroom of the future is expected to become the most innovative room in the house so far. Companies today are developing offerings such as customised room and water temperature control, mood music, lighting and adjustable basin heights. Multi-screen displays will also introduce interactive experiences to the bathroom, potentially transforming women's beauty routines forever.

Designed to help women personalize their daily beauty routine, the Philips 'Smart Mirror' prototype for

example, collects personal information from connected Philips products, such as the Philips Skincare Assessment tool and Philips DiamondClean smart app. These use inbuilt smart sensors that measure the moisture content of a user's skin and their brushing technique. The Smart Mirror then stores this information to provide tailored recommendations to users that optimize their personal beauty routines. Pretty nifty!

Similarly, the Philips Smart hairbrush prototype measures hair elasticity, resilience, shine, hydration and damage to calculate a personalized health score in the Philips hair app. Armed with this knowledge and these recommendations, women can make informed decisions about their hair health and beauty routines, selecting products and ingredients that are right for them.

What do women want?

So how do women across the globe feel about the future of bathroom-based technologies? Philips research reveals that women globally are most excited about the possibility of using an app that allows them to chat to their home virtual personal assistant to receive personalized skincare advice (28 percent). This figure rises significantly to 57 percent of women in Germany and 52 percent in the UK. Globally, 22 percent of women are excited about connected toothbrushes that monitor their oral healthcare routine and provide personalized feedback, such as the Philips Sonicare DiamondClean. The same percentage globally are just as excited about being able to take a photo of a make-up look and trying the exact same look on their face using augmented reality.

The bathroom as we know it will soon be much more technologically advanced. It's undergoing a much-deserved make-over, and we can't wait to see the results.





AI Advisors

Once upon a time, technology and beauty were worlds apart. Today, they're closer than ever and empowering women to tailor their beauty solutions and routines, leading to better, more transformative results.

Technology, especially advances in artificial intelligence (AI), is shaking up and transforming the way women look for, assess and buy beauty products. The evolution of beauty technology is enabling women to feel more empowered, giving them the freedom and flexibility to choose products that are personalized to their skin, hair and lifestyle needs and wants.

Saving time, personalized results

As technology continues to evolve, so do women's expectations of how personal health and beauty devices can benefit them and enhance their beauty routines. In response, beauty brands across the world have been launching products and apps that save women time and money and provide personalized advice on which ingredients and products will suit them most. For example, through a partnership with Chinese tech giant Meitu, Sephora created AI ColorIQ app which helps women find their foundation, concealer and lip shade match using color-corrected images, visible light and ultraviolet light. Also, L'Oréal and Modiface has launched the first skin care diagnostic authentically powered by AI and science, which allows consumers to upload selfies to obtain effective treatment advice. The demand from women for smart devices like these and others is clearly there – the 2019 Philips Global Beauty Index reveals that more than half (57 percent) of women surveyed are most excited about a service or platform that takes their hair type, hair structure, hair goals and other preferences and turns these into their ideal ingredient and tool combination when thinking about the future.

What women want

Ultimately, advances in technology mean women today expect more than just analytics and diagnostics from smart beauty devices and apps: they want solutions to their beauty problems and proof that the product, ingredients and routine recommendations made are truly best for them personally. They're also increasingly looking for beauty approaches specifically designed for them at a genetic level. AI is making this possible. The Philips Skincare Assessment prototype is a good example. Through the app users are asked questions about their skin and take selfies each morning and evening for two days. The app takes the user's answers to determine their skin hydration and oiliness levels and uses their selfies to assess skin concerns such as smoothness, wrinkles, pigmentation and radiance, producing a personalized skin report. The report lets individuals make informed decisions about their skin care so they can optimize their daily routines and feel their best every day.

Excited about apps

Philips Global Beauty Index results provide further insight into women's growing preference for AI-based and smart beauty devices: according to the research, women are more excited about technological developments in the beauty industry in 2019 than they were in 2018. They also reveal that in 2018, 51 percent of women globally were excited about a mobile app that scans a user's skin tone to identify and create a personalised foundation, compared to 58 percent in 2019. Meanwhile, 47 percent of women in 2018 were excited about a service or platform that has mined millions of skincare reviews, ingredients and products to identify what is most suited for particular skin types, increasing to 56 percent in 2019.

Blending AI and the human touch

Despite the huge impact technology is having on the world of beauty, women still desire the 'personal touch'; according to the 2019 Index, just 17 percent of women globally expect there to be less interaction with people and more interaction with technology in the beauty industry over the next five years. However, according to Talk.Global communications consultancy, meaningful brand experiences don't have to be face-to-face, and consumers are starting to distinguish less between online and offline advice. Thus beauty brands today and tomorrow need to ensure both 'human' and 'artificial and virtual' worlds are seamlessly linked.

Many brands are already finding innovative ways to maintain a personal approach while making the most of technology, such as launching apps that help women connect virtually with specialists from the comfort of their own home. The Philips Smart Mirror prototype is a good example. It's designed to connect to a variety of Philips sensor-laden smart health and personal care products, such as the Sonicare toothbrush, to guide

users through best-practices during daily routines and understand how to effectively use Philips beauty tools to the best of their ability.

Looking to the future

It's evident technology and beauty are working together to continuously improve women's beauty, health and self-care routines and enhance their daily lives. "Global beauty brands continue to launch exciting new products and from what we're seeing on the market, the possibilities of what's next are endless. AI in beauty has a strong future and will keep helping women worldwide better understand their needs and how to develop their routines to get the best results," says Bianca Heiszwolf, Business Leader Philips Beauty.

As technology continues to evolve and AI becomes the norm in personalising beauty routines, women are becoming more empowered to make better informed self-care decisions. The future of personalized beauty really is only just beginning!



Smoothing the way

Hair-free skin remains a big trend in the world of beauty, with many women including hair removal in their daily beauty routines. Here's why Intense Pulsed Light technology is becoming the preferred at-home long-term hair removal solution.

What's your style?

From shaving and epilating to in-salon laser treatments – when it comes to removing body hair, where do you begin? It really does come down to women's personal preferences and the results they're looking for. But with multiple options on the market, how do women figure out which method serves their needs best?

The 2019 Philips Global Beauty Index reveals that a significant 29 percent of women globally use an epilator, up from 22 percent in 2015. They're especially favoured by women in Argentina (58 percent), Turkey (52 percent) and France (41 percent). However, IPL or Intense Pulsed Light hair removal is on the rise, especially in countries like Turkey, where it is used by 18 percent of women compared to eight percent of women globally.

The benefit of light

IPL is a form of light therapy that's used for various dermatological procedures, including hair removal. While commonly thought to be the same as laser hair removal, the two are different: IPL uses multiple wavelengths while laser treatments use just one specific wavelength. While the light-based method is a popular hair removal process used in beauty salons around the world, the inconvenience of having to visit a salon, and in some cases the cost of this, can be discouraging for women.

The ultimate game changer

The Philips Lumea Prestige at-home IPL device has been designed to provide a tailored hair removal solution for all parts of the body, meaning women can experience the feeling of continuously smooth, hair-free skin for up to six months¹.

Dermatologist and Philips spokesperson, Dr. Stefanie Williams, explains the benefits of the device:

How does the Philips Lumea Prestige work?

"Intense Pulsed Light (IPL) technology, featured in the Philips Lumea Prestige, progressively reduces hair regrowth by applying gentle pulses of light and heat to the root/follicle. This stimulates the hair to go into a resting phase, slowing down regrowth."

How does the Philips Lumea Prestige differ from other Philips IPL devices?

"The innovative technology, developed with leading dermatologists and Philips hair removal experts, comes with four tailored attachments for women's hair removal requirements. The attachments have been designed with the curves of the female body shape in mind, with specific options for the body, bikini area, face and armpits, to deliver the most effective and easy treatment for these areas.

The Lumea Prestige can now also be used both corded and cordless. Cordless treatment is easier to handle for smaller or harder to reach areas of the body while corded is better for larger areas. Using the device corded speeds up the frequency of the flashes to once every two seconds, making the treatment time 1.75 times faster. This means women can treat both lower legs in 8.5 minutes without needing to recharge the device between treatments."

What are the benefits of IPL over other hair removal methods?

"Hair removal is a huge part of women's daily lives. This device helps reduce hair growth by up to 92 percent², so women can safely experience continuously smooth, hair-free skin that's both cost effective and saves time. To treat all hairs successfully and prevent the hair root from becoming active again, the treatment only needs to be repeated every two weeks for an eight-week period. To maintain these results and get hair-free skin for up to six months*, a top-up treatment is required around every four weeks. It really couldn't be easier."



¹Median result 78% hair reduction on legs, after full treatment cycle (12 treatments), objective study on 48 women in the Netherlands and Austria.

²Philips data on file when following the treatment schedule, measured on legs, after 3rd treatment, individual results may vary.

The evolution of influence



Exploring how beauty communities are changing, giving women more access to advice, knowledge and inspiration than ever before.

Beauty advice can be golden. A new product recommendation, a helpful application tip, or advice on how to create a new hair style; these little nuggets can transform a woman's beauty routine, boosting her confidence and effecting great results. While previously this advice would have come from women's immediate community, such as their friends, families and colleagues, with the evolution of technology there are now more places than ever for women to find beauty inspiration and knowledge. But is this a blessing or a curse?

Widening horizons

Thanks to the rise of social media platforms such as YouTube, Instagram and WeChat, forming online communities and finding beauty advice has never been easier. With just a tap on a phone screen women can now connect with likeminded individuals across the world to exchange tips on everything from hairstyles and skincare trends to make-up. In fact, more than half of women in Turkey and India now find beauty advice on social media (56 percent and 51 percent respectively). This is significantly higher than more traditional forms of media in these countries such as print publications (28 percent and 26 percent respectively). In contrast, European countries such as France, Germany and the UK still tend to favour print over social. That being said, there is clearly a need for content to feature across multiple platforms to ensure it is accessible to everyone. So, while many women today are turning to online videos and tutorials for advice, they're still turning to printed sources for 'background' beauty information too – this choice of online, social and print channels is providing women with a well-rounded mix of information to base their beauty decisions on.

The new celebrities

Undeniably, online communities are impacting women's beauty and buying habits globally, particularly those that are formed around social media influencers. The rise of the influencer has been a global phenomenon in recent years, with bloggers and vloggers now considered celebrities in their own right and able to command thousands of dollars for just one social media post. In fact, according to Business Insider, the influencer marketing industry is on track to be worth up to US\$15 billion by 2022.

Correspondingly, research from Philips reveals that one in four women globally (25 percent) now turn to bloggers or vloggers to discover new beauty brands or products. This is a far higher figure than those turning to traditional celebrities (15 percent globally), showing just how much influence these social-media-savvy individuals have garnered over a relatively short period of time. The minor exception is India, where celebrities (30 percent) and influencers (31 percent) are favoured almost equally. With many brands prioritising influencer engagement, as opposed to follower numbers, a sense of community is a hugely important asset for these social stars to cultivate.

Alternative influencers

Interestingly, it's not only humans creating online communities. In the past year, the influencer space has evolved even further to include AI influencers such as @LilMiquela. Miquela is an Instagram model and musician who has been interviewed by the likes of Vogue and Refinery 29, partnered with brands such as Calvin Klein and Prada and has amassed a following of 1.6 million followers, all despite being a 'sentient robot'. Her success shows that there is an appetite for alternative influencers and suggests that more of these fictional profiles could achieve notoriety and influence over the coming years.

However, if even AI enabled characters are now dispensing advice and sharing inspiration, how can women differentiate between helpful content and irrelevant information?

Communities close to home

It also seems that while many women now are looking to online communities for advice, it's actually people closer to home who they depend on most for useful beauty advice and inspiration. Forty-nine percent of women globally still turn to their friends, family or colleagues for beauty advice and this figure grows to 63 percent in Korea and 60 percent in Turkey. This is notably higher than the number of women who turn to social media, which is 37 percent globally in comparison. In fact, Argentina is the only country that prioritises social media over friends, family and colleagues when it comes to obtaining beauty advice, and only then by a very narrow margin: 49 percent versus 45 percent.

It seems then that we still trust the recommendations from people in our close communities more than other sources. This is likely due to women believing that direct advice is more genuine and reliable than that shared by celebrities, influencers or online communities, whose recommendations may be brand endorsed.

Looking to the future

Thinking ahead to the next five years, how do we expect beauty communities to evolve further? It seems likely that technology will continue to advance and break down barriers between geographies, genders and generations. With many of us already sharing our lives online, we will receive more exposure to different communities and have access to more inspiration and advice than ever before.

Yet, while this is exciting and invigorating, it means that women will need to filter this information to reach helpful conclusions. With only eight percent of women globally stating that they would change their health and beauty routine because of a celebrity or influencer recommendation, beauty brands need to continue to focus on creating products that provide results and solve problems, while also sharing advice which women can rely on. One way of doing this could be through supporting apps such as the Pregnancy+ and Baby+ apps developed in partnership with Philips. These platforms are developed in collaboration with leading experts to provide expecting and new parents with simple and reliable advice that they can feel confident in.

If brands succeed in establishing a relationship as a trusted advisor which delivers effective solutions, then word will spread naturally among all communities, be that online or through the people we see on a daily basis.



Beauty's spiritual awakening



Women's appetite for holistic beauty regimes is growing. The beauty industry is responding with solutions that go beyond skin deep, helping women feel good from the inside out.

Slow down. Reconnect with your inner self. Breathe. The world of beauty is undergoing a spiritual transformation, with many women today seeking products and solutions that balance science and functionality with spirituality, health and wellness.

Healing from within

From crystal-infused skincare and lunar-inspired massages to celebrity-endorsed moon body sprays, beauty products that aim to connect body, mind and spirit are becoming the 'new normal' in women's bathrooms across the world. Vogue magazine recently reported¹: "The beauty industry is embracing the [spiritual] trend, from facial massage to holistic treatments and even skincare — where semi-precious stones are blended into formulas to balance energy and heal the skin from within."

Outside of the home, health and beauty offerings such as mindfulness training, lifestyle coaching, acupuncture and aromatherapy are now finding their place in the mainstream beauty industry. Once considered alternative, these practices are now providing the perfect antidote to women's increasingly busy and demanding lives.

It's all about wellbeing

While effectiveness and visible results remain top of the list for most women when choosing which regimes to follow, research from Philips indicates that almost half of women in Russia and Turkey (45 percent) would be influenced to change their beauty routine if they found a product that improved their emotional and spiritual wellbeing. While this figure drops slightly to 40 percent in Argentina, 39 percent in India and 33 percent in China, the findings also reveal that more than six in 10 women around the world are already taking a holistic approach to beauty (62%). Clearly then, there is a growing appreciation for beauty regimes that complement and intertwine with women's wider lifestyle, fitness and health choices around the world.

A desire to de-stress — and look good

So, what's driving the trend for regimes that connect body, mind and spirit? The global wellness movement is definitely playing a big part. As are women's increasingly busy lives and their desire to de-stress and switch off. Younger consumers are contributing too — a recent US study²

suggests 70 percent of Gen Ys (born between 1980 and the early 1990s) and Gen Zs (born in the early 1990s to 2000s) "look for spirituality in their lives through things like listening to music, engaging in self-care or creating art."

Tech is playing its part

Technology is also playing its part in supporting women on their quest for regimes that offer more than just practical benefits. The Philips VisaPure Advanced three-in-one home facial device for example, has been developed with Japanese massage experts and not only provides women with deep, gentle facial cleansing but also increases blood circulation and relaxes the muscles to revitalize skin. The tool's cleansing brush attachment delivers 11 times more effective facial cleansing than cleaning by hand³ in just a one-minute treatment program, while its integrated massage attachment has a three-minute program that creates the feeling of 750 gentle finger taps per minute, increasing blood circulation and leaving skin radiant and revitalized. A third attachment uses a premium cool material with ceramic coating to provide a quick 30-second boost to refresh to tired eyes. The overall experience offers women a chance to indulge and pamper, helping them to relax.

Additionally, the Philips Hair Dryer Prestige with SenseIQ technology combines hair styling with hair health benefits, helping women feel both confident and reassured that their styling routines will not damage their hair. The intelligent hairdryer measures temperature of hair up to 30 times per second with every use so women can achieve beautiful, on-trend styles quickly, while feeling confident their hair remains in tip-top condition on the inside.

The next five years ...

So, what does the future hold for more holistic, spiritual beauty regimes? The Philips Global Beauty Index findings signal the trend is likely to continue, with 44 percent of women worldwide saying they expect to see a more holistic approach to beauty that connects health and beauty across the industry in the next five years. Up from 27 percent from the survey's 2015 results, the findings indicate women's awareness of and appetite for more balanced, holistic beauty that considers their needs both inside and out, is growing rapidly.

While demand for some 'spiritual' products, such as moon body sprays and lunar-inspired massages may not last forever, the wellness movement shows no signs of slowing down, blurring the lines between science and spiritual health and beauty even further.

¹ <https://www.vogue.co.uk/article/top-trends-in-wellness-for-2019>

² <https://library.canvas8.com/signals/2018/06/21/spiritual-brands.html>

³ Compared to make-up removal by hands. Data on file.

Healthy, shiny hair has been a status symbol for women throughout history and thanks to new technology women are now able to understand their hair better than ever before.

Style it out

Creating beautiful styles is becoming far easier for women to achieve at home thanks to new devices such as the Philips Hair Dryer Prestige with SenseIQ technology. In fact, according to research from Philips, hair styling tools continue to be the most popular beauty tools globally, with 76 percent of women saying they use a hair dryer, a four-point rise from five years ago. Hair straighteners and hair curlers are the next most popular tools, with 41 percent and 30 percent of women globally saying that they use these in 2019. Interestingly there are notable market nuances however, for example one in three women (66%) in Argentina use a hair straightener, while Turkish women also rate far higher than the global average with 62 percent using straighteners and 55 percent hair curlers. This is possibly due to societal expectations in these countries for women to look well-presented or may be attributed to different hair types which require more maintenance.

What's the challenge?

Yet while styling is an important part of women's daily routines across the world, there is a concern about the impact that styling tools are having on the health of hair. Over half of women globally (57 percent) are concerned about the condition of their hair and 64 percent of women globally say they would like to understand their hair needs better to optimize their routines, so they can look their best. This is particularly true in India, China and Turkey with more than 80 percent of all women in these countries agreeing with this statement. China and India similarly express the most concern regarding the condition of their hair, with 77 percent and 76 percent respectively saying they were concerned about moisture levels, split ends and density compared to a global average of 57 percent.

What's the solution?

Fortunately, brands such as Philips understand the beauty dilemma women are facing and are dedicated to providing them with solutions that allow them to achieve beautiful styles without compromising on hair health. The new Philips Hair Dryer Prestige with SenseIQ technology for example, has been developed to measure the temperature of hair up to 30 times

per second and adjusts the airflow temperature accordingly. Providing women with a personalized solution to hair styling that will not only improve the efficiency of styling but offers them shiny, healthy looking hair too.

"I believe that styling hair should be one of the most enjoyable and fun parts of a woman's beauty routine and shouldn't be compromised by concerns about damaging hair," comments Ilham Mestour, Philips consulting haircare expert. "Unfortunately, many women actually avoid styling hair because they're worried about the health of their tresses, but providing you use the right tools, like the Philips hair styling devices, you can still achieve beautiful styles without causing split-ends or dryness."

Knowledge is power

In addition to hair styling innovations however, how else do women expect the hair care industry to evolve further over the next five years? Research from Philips has revealed that 54 percent of women globally are excited about the prospect of a smart hairbrush that can measure frizz, dryness, split ends and breakage, while 57 percent are excited about a service or platform that takes your hair type, hair structure, hair goals and other preferences and turns these in to your ideal ingredient combination.

Understanding then, that knowledge is often power when it comes to effective beauty routines, Philips is working to provide women with more intelligent and personalised solutions to help improve the health and condition of their hair. One such device which is currently in development, is the Philips smart hairbrush prototype. This innovative new tool measures hair elasticity, resilience, shine, hydration and damage to calculate a personalized health score in the Philips hair app. Armed with this knowledge and these recommendations, women can make informed decisions about their hair health and beauty routines, selecting products and ingredients that are right for them.

New, empowering developments

Looking forward, it seems women across the globe can feel positive about developments in hair care and confident that they will be able to achieve their perfect style with optimal health of the hair. Thanks to new developments in technology, women can feel empowered to unleash their inner magic, revealing her most beautifully confident self, ready to take on the world. Today, and tomorrow.

A moment in hair history

From Boudicca and Marie Antoinette to the current Duchess of Cambridge, beautiful hair has long been a status symbol and an expression of power. When women have a good hair day they feel unbeatable, as though they can achieve anything, and this is likely why the global hair care market is now estimated to be worth nearly US \$90 billion. Women globally are clearly investing in their hair and with new breakthroughs in beauty technology, good hair days are likely to be far easier to achieve.



The rise of the conscious beauty consumer

Women are increasingly looking for beauty solutions that not only provide visible results but also reflect their personal values — and the beauty industry is responding.

Over the past 10 years the world has produced more plastic than during the whole of the past century and each year more than eight million tons of plastic is dumped into our oceans¹. It's startling and emotive facts like these that are making the world listen up and pay greater attention to the impact that consumerism is having on the planet and its future.

Responding to women's demands

In response, the beauty industry has been making great strides towards becoming more environmentally friendly, sustainable and ethical. Beauty brands, such as Unilever and L'Oréal, for example, have pledged to use 100 percent recyclable, reusable and compostable plastic by 2025², and many others are following suit — not just because they want to do the right thing but because women are demanding it.

New priorities

While Philips global research reveals that 82 percent of women today prioritize effectiveness above all other factors when deciding which products to buy, women are increasingly

paying attention to brands that not only make them look and feel good but also reflect their personal values at the same time. According to the findings, 64 percent of women globally prioritize organic ingredients when purchasing beauty products; 60 percent prioritize sustainability; 52 prioritize inclusivity; while 45 percent prioritize vegan ingredients.

Room for growth

Interestingly, the research goes on to reveal that almost half of women (48 percent) in Turkey, Argentina (47 percent) and India (45 percent) would be influenced to change their health and beauty routine if they found a product that is ethical/eco-friendly/cruelty-free. This figure drops to 22 percent of women in Korea and 18 percent in Japan, indicating great potential for women in the East Asia region to catch on to the wider global trend towards beauty regimes that don't just provide visible results but that are also more ethical and sustainable.

Beauty companies are listening up

The good news is that the beauty industry is paying attention to women's preference for brands that 'do the right thing'. Mintel's Global New Products Database reports that vegan product launches rose by 175 percent between July

¹ <https://plasticoceans.org/the-facts/>

² <https://www.mintel.com/beauty-trends/thank-you.php>

2013 and June 2018, while organic beauty company Neal's Yard Remedies is the world's first CarbonNeutral³ retailer – it's been offsetting its greenhouse gas emissions every year since 2008 by saving areas of endangered rainforest in Madagascar. Meanwhile, shopping platform Loop has launched pilot schemes in cities across the world where customers can order products that typically come in single-use plastic packaging, such as shampoo, in durable, refillable containers instead, which the company collects from their doorsteps and cleans for re-use⁴.

Long-term, sustainable solutions

Philips is also recognizing women's desire for more long-term, sustainable and inclusive beauty solutions. The Lumea Prestige Intense Pulsed Light (IPL) at-home hair removal device for example, removes hair on all parts of the body, helping women experience the feeling of continuously smooth and hair-free skin for up to six months⁵. Its SmartSkin sensor feature meanwhile measures skin tone at the press of a button and advises women which setting will work most effectively for them, helping them achieve the best results possible,

responding to women's worldwide call for more inclusive, tailored products. In addition, reprocessed Lumea Prestige IPLs are available as a circular economy offering in Germany and will be released in other markets in the near future. Thanks to smart engineering, the reprocessed devices have 40 percent less environmental impact with 40 percent less environmental costs, while meeting the same performance standards as brand-new ones⁶.

The next five years ... and beyond

So, what does the future hold for sustainable, inclusive and environmentally-friendly beauty regimes? Philips global survey provides some good insight, indicating with more than half of women globally (57 percent) expect to see even greater use of more natural or organic ingredients/fewer chemicals between 2019 and 2024 – a really positive sign.

The growing preference from women for regimes that truly go deeper than skin deep is a great thing and a great shift not only for women and the beauty industry as a whole, but also for the future of our planet and generations to come.

³ <https://www.nealyardremedies.com/about-us-pages/beliefs/sustainability.html>
⁴ <https://www.fastcompany.com/90296956/a-coalition-of-giant-brands-is-about-to-change-how-we-shop-forever-with-a-new-zero-waste-platform>.

⁵ Median result 78% hair reduction on legs, after full treatment cycle (12 treatments), objective study on 48 women in the Netherlands and Austria.

⁶ calculation based on the environmental price of a reprocessed Lumea Prestige vs placing a new Lumea Essential on the market.



Five-year reflections

The world of beauty is constantly evolving. Here's how women's attitudes and beliefs around beauty have been changing and which at-home devices have become more popular since 2015.

A lot can happen in five years. In the beauty industry, things have been moving faster than ever. Technology has been playing a huge part in the changes happening by driving innovation, personalizing women's beauty experiences and helping brands make their products, processes and packaging more sustainable.

Continuous evolution

Along the way, women have become more informed about what their favourite beauty brands stand for, what goes into the products they use and how they're made. Today, many women look for products that don't just 'work', but also support their lifestyles and what they believe in: do they fit into their busy lives? Are they made from organic ingredients? Are they environmentally sustainable? Women are also embracing healthy living and self-care as part of their overall approach to beauty, blending the boundaries between beauty, health and wellness even further.

Tech, attitudes and beliefs

While the beauty industry has evolved significantly in the past five years, largely due to technological advancements, women's attitudes and beliefs around beauty have also changed: they're more conscious of their beauty decisions than ever before, seek personalization, efficiency, inclusivity and solutions that are sustainable.

More than skin deep

In 2015, 47 percent of women surveyed in the Philips Global Beauty Index said they considered themselves to be beautiful, increasing to 60 percent in the 2019 results – a really positive result. This could be because of a number of reasons but one in particular seems likely: women's

perception of beauty is shifting from something that's more than skin deep. Supporting this thinking, the results go on to reveal that in 2015, 41 percent of women worldwide agreed their looks are less important than how they feel, rising steadily to 51 percent of women surveyed in 2019. This is another really positive sign that women are placing increasing importance on their inner health, redefining their overall sense of beauty as something that encompasses wellness and health.

From salons to women's homes

So, what about women's beauty regimes – are women's preferences changing? Women's lives are certainly becoming busier and, as a result, women want their beauty routines to not only be effective but also convenient and efficient. Thanks to technology, specialist beauty treatments and regimes that were once only available in salons, such as hair removal and deep facial cleansing massages, can be performed easily and efficiently at home. The Philips VisaPure Advanced helps women do just this. The electronic facial cleansing device is clinically proven to be 11 times more effective than cleansing by hand. It also features a unique massage attachment that women can use to give themselves a relaxing and invigorating three-minute facial massage at home, leaving their skin with a healthy glow.

Hair, hair, hair

Turning to Philips global research once again, hair tools have grown in popularity over the past five years, indicating just how important good hair is to women feeling and looking good. Of 11 at-home beauty tools, including epilators, electronic facial brushes and hair curlers, hairdryers remain the most popular at-home devices. While slightly fewer women are using hair curlers in 2019 compared to five years ago, hair straighteners have become more popular, used by 41 percent of women in 2019 compared to 35 percent in 2015.





Styling and care

Reflecting on the results, celebrity hair stylist and Philips haircare ambassador Ilham Mestour says technological advances are encouraging more women to both style and look after their locks at home. “Women today can achieve great results with at-home styling devices and improve their hair at the same time. The Philips Hair Dryer Prestige with SenseIQ technology for example, has been designed with care in mind. Understanding that women’s hair texture and condition can vary greatly, not just from person to person, but also from time to time, this hair dryer has been developed to measure the temperature of hair more than 12,000 times per drying session¹. This provides an accurate assessment of hair temperature with every use, enabling women to achieve beautiful, on-trend styles quickly, without compromising on the health of their hair. Additionally, it also features a unique vibrating scalp massager to improve blood circulation, helping women achieve healthy looking locks that shine.”

¹Based on 7 minutes of average drying time.

Hair removal and skincare: more popular than ever

Conversely, throughout the world, at-home hair removal continues to play a significant role in women’s beauty routines. Looking at the 2019 Index results, epilators remain the most popular at-home hair removal device compared to laser hair removal and IPL (intense pulse light) hair removal tools, with 22 percent of women surveyed saying they used an epilator in 2015, jumping to 29 percent of women in 2019. Over the five years, at-home laser and IPL hair removal also grew in popularity among women globally, jumping from two percent to eight percent and three percent to eight percent respectively. Facial devices are becoming more popular too, with nine percent of women using an electronic facial cleansing brush in 2015, increasing to 15 percent in 2019, whilst at-home use of microdermabrasion has doubled in the past 5 years.

Here’s to the future of beauty

As women’s perception of beauty continues to include more holistic elements such as health and wellness, and as at-home regimes become more advanced and easier through technology, women’s beauty routines look set to become more effective, easier, better and more fulfilling over time. Here’s to the next five years!



Activate your **body's** **magic.**

When it comes to beauty, women want advanced and effective solutions: while they seek high performance, they also look for trusted solutions that are good for their body.

At Philips, we believe bringing beauty solutions that work and care for you starts with a deep understanding of how each woman's body really works, enabling us to design innovative beauty solutions that work with her hair, skin and body in a uniquely personalized way.

With haircare devices that sense and adapt to every hair, women no longer need to compromise the health of their hair for perfect styling results. With facial beauty tools that cleanse, exfoliate and stimulate skin to allow natural cell renewal, they can gently bring out the youthful glow in their face. And with innovative hair removal tools that use the power of light to break the cycle of hair regrowth, they can achieve truly long-lasting smooth skin.

That's how our beauty solutions gently yet effectively unleash the inner magic within every woman, revealing her most beautifully confident self, ready to take on the world. Today, and tomorrow.

There's always a way to make life better.

Beauty tools we love to activate your body's magic.

Personal touch

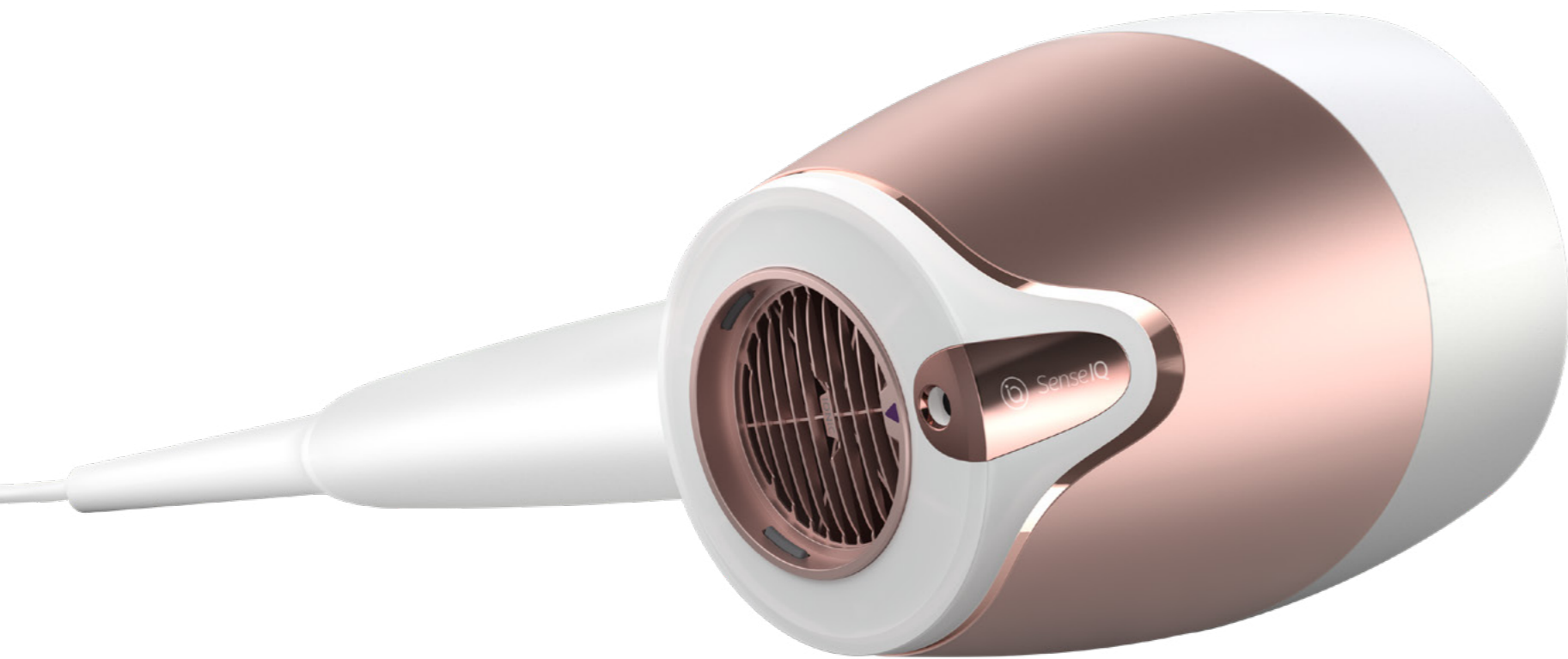
Thanks to the SenseIQ technology featured in Lumea Prestige, IPL treatment is now individualized to the user's skin tone and gives women hair-free smooth skin for up to 6 months*. Lumea uses gentle flashes of warm light to progressively reduce re-growth of the hair, putting the root into a resting phase. The SmartSkin sensor detects skin tone to indicate the most comfortable light setting, personalized to the users' skin. While the four intelligent, curved attachments adapt programs tailored for each body area. Co-developed with dermatologists and inspired by women, Lumea is the total body solution for gentle hair removal even on sensitive areas. The Lumea IPL app supports women in every step of the way with tips and tricks, personalized treatment programs and adaptive scheduling. All-in-all, the way to get silky-smooth hair-free skin!



*Median result 78% hair reduction on legs, after full treatment cycle (12 treatments), objective study on 48 women in the Netherlands and Austria.

Healthy hair

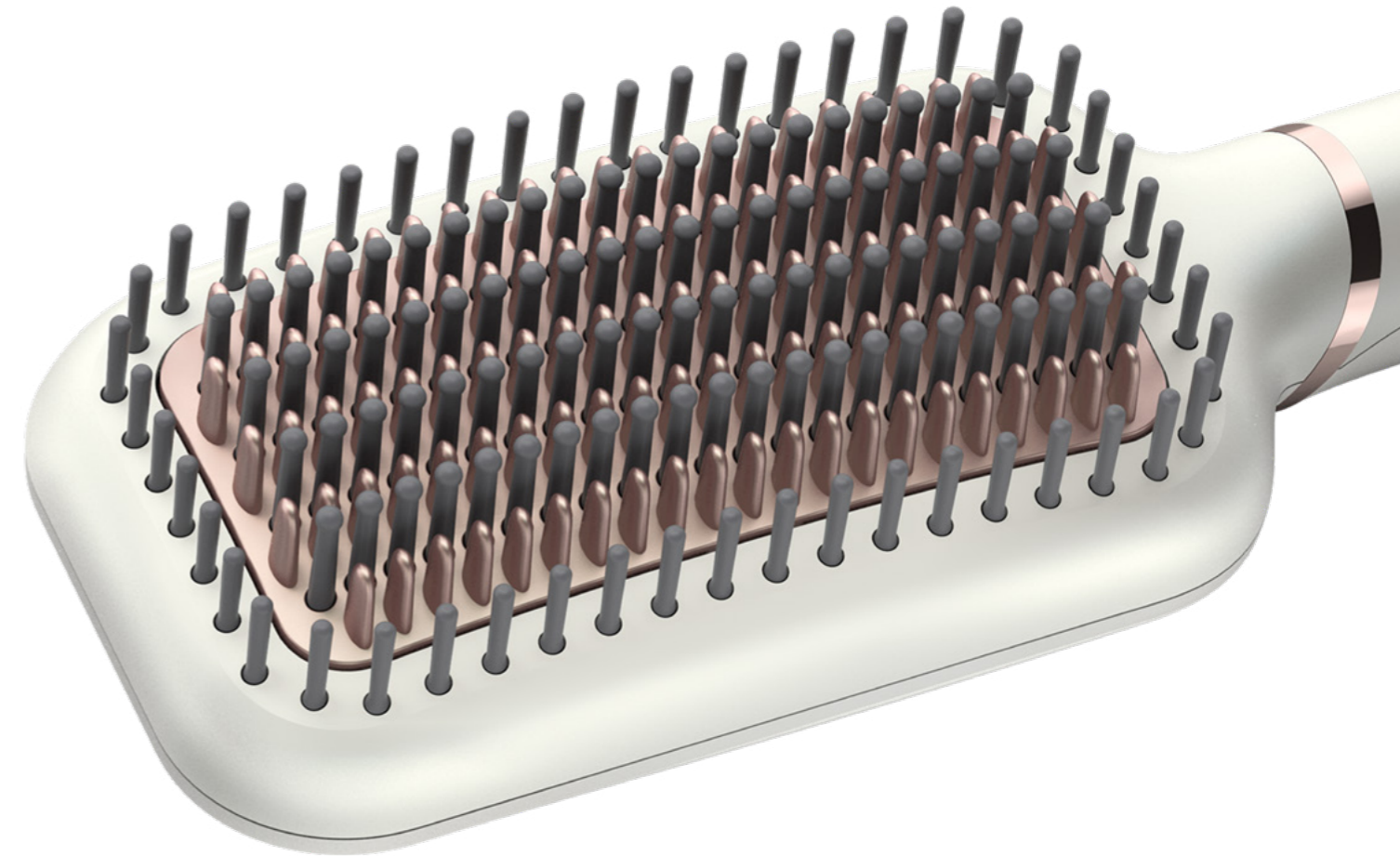
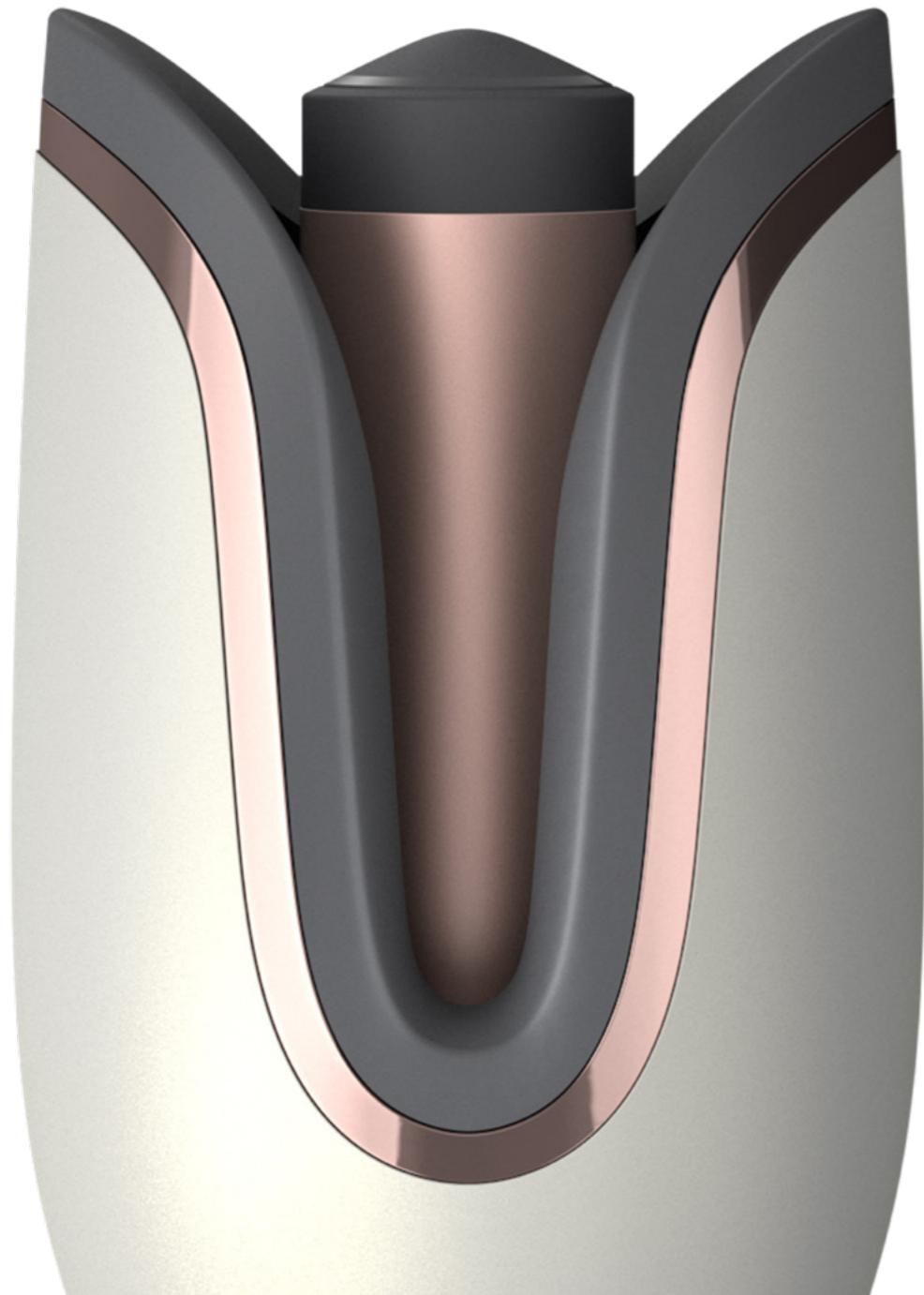
Everybody's hair is unique, so its care should be too. The Philips Hair Dryer Prestige with SenseIQ technology, measures hair temperature more than 12,000 times per drying session* and adjusts according to the needs of women's hair, for a personalized drying experience. It also features a vibrating scalp massager to improve blood circulation. Shortly, it senses, adapts and cares to enable women to achieve beautiful, on-trend styles quickly, without compromising on the health of their hair.



*Based on 7 minutes of average drying time.

Curl it up

Create perfect, salon-style curls with the Philips StyleCare Prestige Auto Curler. With inbuilt MoistureProtect technology, this innovative device boosts shine and preserves hair's natural moisture, while the ionic booster removes static to ensure that hair remains smooth and frizz-free.



Straightaway in 5 minutes

The Philips Heated Straightening Brush provides a welcome solution for women looking to create straight styles quickly and efficiently, without compromising on the health of their hair. This unique device can naturally straighten hair in just five minutes, thanks to the large paddle shaped design, which can be used on large sections of hair to create an all-over smooth style quickly and effectively. Taking just 50 seconds to heat up, the Philips Heated Straightening brush is both time efficient and easy to use, so women can achieve the straight styles they want with confidence and no waiting around.

Activate
your
**body's
magic.**

**Long lasting styles.
Fast and easy.**

Curly tresses or a sleek style, whatever look is preferred, the Philips Auto Curler and Heated Straightening Brush presented in a luxury case. What else does a style-savvy woman want?



Beauty tools we love



Clean up

The Philips VisaPure Advanced, an at-home facial tool for women, features three bespoke attachments designed to provide women with a skincare routine with cleansing, massage and fresh eyes attachments. It provides a deep and gentle facial cleansing, a 3 minute program massage to stimulate blood circulation and relax muscles and a quick 30 second boost to refresh tired eyes. To start and end the day, enjoy refreshed, radiant and healthy glowing skin!

Activate your body's magic.



