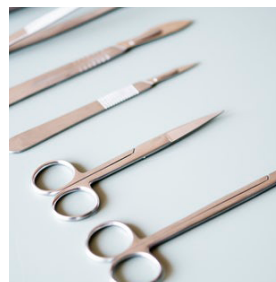
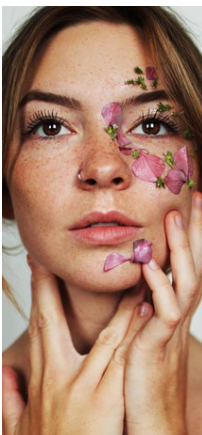


PREVENTATIVE BEAUTY

.....

Intelligence Report



Now more than ever the power is in consumers' hands to stave off the harsh effects of time. Rapid technological advancements and increasing accessibility in aesthetic medicine have afforded individuals the ability to address the symptoms of aging and decay earlier and with greater ease. With technological advances has come to ability to treat the far-reaching factors of aging, hair loss, and disease. This report aims to understand the world of preventative medicine and beauty to get a better look at where the skincare, cosmetic, and anti-aging market is headed.



KATIE RUTLEDGE

“Water, water, water...the more you hydrate your body, the more you hydrate your skin!”



ANNIE McROSKEY

“Our skin is designed to take care of itself. Sometimes products can cause more harm than good when you are over-doing it. Pay particular attention to your skin’s needs and cut back on exfoliating or products for a few days to let your skin reset.”



MADELINE STEINER

“Your skin and hair go through seasonal and life changes, so what worked for you in the summer or a few years ago might not be successful now or during the winter time. Make sure you ‘listen’ to what your body needs.”

This month the editors at Trendalytics wanted to explore a topic we felt we knew little about. The changing world of preventative beauty, both in number of options for treatment and in who is being treated, presented itself as a ripe opportunity.

The digital revolution has not only spread knowledge about science, psychology, and its relationship to beauty and wellness, but also expanded and amplified the conversations around this once taboo subject. The mindset of both the patient and the onlooker has shifted.

Just as perceptions of who the right candidate for anti-aging treatments is and what treatments take it too far have changed around us, so have our own relationships with skincare, prevention, and taking action. Meet our team as we sound off on the best aging advice we’ve received...



CECE LEE

“Eat tomatoes. I’m pretty sure my grandma told me this because I was a picky eater, but she had great skin so...”



KELLY HASELSCHWERDT

“Sunscreen is your best friend.”



AMANDA LEWIS

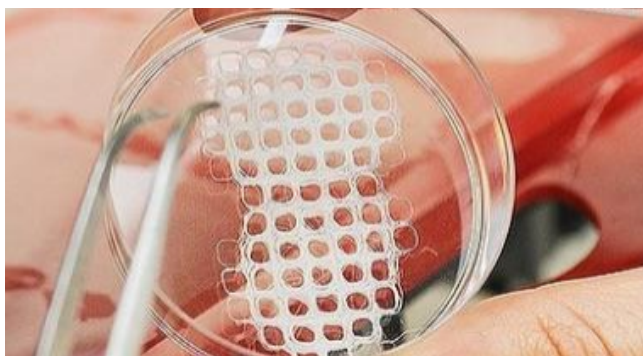
“Pay more attention to what you put in your body - your skin will thank you!”

THE MEANING OF PREVENTABILITY

Advancements in technology are driving the changes in aesthetic medicine. Treating aging as a disease and longevity as the answer has allowed the same principles innovating finance, health care, and technology to be applied to preventative health and beauty. Artificial intelligence is improving every touchpoint of the skincare and cosmetic industries, from being able to understand skin and hair types, to putting the power in consumers' hands through apps. Blockchain has the potential to improve the ways in which consumers' skin profile data is stored and shared privately.

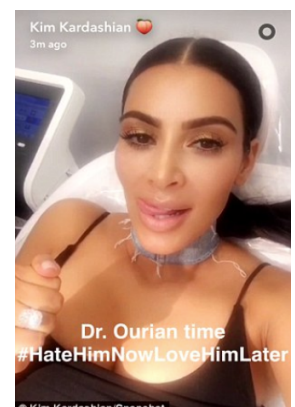


3D printing also presents one of the most exciting avenues for skincare. Not only can printed skin render animal testing obsolete, but it can also be leveraged in cosmetic application in the future.



Technology is also a driving force on the consumer side of the industry. As the age of social media and digital awareness have breathed new life into cosmetic surgery and treatments, the perception of who is eligible for a Botox injection or laser facial has changed. Between 2011 and 2016, surgical and non-surgical treatments among Millennials aged 19 to 34 jumped 87% and accounted for 18% of total treatments performed.

In a culture of oversharing, celebrities are changing stigmas around cosmetic procedures and doctors are developing cult followings by unveiling the artistry behind once taboo surgeries. The social climate has yet to celebrate women for having cosmetic work done but is more understanding and appreciative of a woman (or man) who spends time and money investing in her beauty, health, and wellbeing.



MARKET SHARE

<p>\$303.2 Billion The revenue the anti-aging beauty market is forecasted to generate by 2025</p>	<p>Cosmetic Procedure Types 2017</p> <table border="1"><tr><td data-bbox="422 283 711 367">56% Surgery</td><td data-bbox="711 283 971 367">44% Non-Invasive (i.e. fillers and peels)</td></tr></table>	56% Surgery	44% Non-Invasive (i.e. fillers and peels)	<p>8.4%: Forecasted compound annual growth rate of anti-wrinkle products over the next 7 years. The growth is driven by dermal fillers and Botox injections for the treatment of wrinkles.</p>
56% Surgery	44% Non-Invasive (i.e. fillers and peels)			

Perennial Millennials

87% growth in Botox use among people aged 19 to 34 within the last five years.

40% of millennials either currently use wrinkle creams or plan to start using them soon.

Millennials are more likely to buy products that have been endorsed by doctors. Amazon's "derma skin care," or professional skin care, grew **262%** year-over-year, making it the fastest-growing beauty category with the retailer.

"People want to perfect their online pictures and also want to look in real life how they have FaceTuned their profile pics," says plastic surgeon, Dr. David Shafer.

The notion of "getting work done" has gained social acceptance. This shift is due to the expanding offering of noninvasive treatments that yield effective results with little to no downtime.

Bro-tox

27.3% lift in surgical cosmetic procedures for men in the past five years.

Facebook founder Mark Zuckerberg's infamous quote that companies should not hire people over the age of 30 has created a need for men in their 40s and 50s to maintain the appearance of youth.



101% increase in the amount of male Botox procedures performed between 2010 and 2016.

Retaining a patient's masculine features, or "making sure you don't feminize" a man's face, remains the single most important factor for men getting cosmetic procedures.

Longevity Startups



\$3.5 billion - the amount Peter Thiel, co-founder of PayPal, pledged to non-profit Methuselah Foundation in 2006 to support anti-aging research.



\$1 billion - funding behind Google's Calico, a health unit launched in 2013 hoping to "solve death."



\$27 million - funds raised for Laura Deming's Longevity Fund, an accelerator aimed at creating an ecosystem of companies hunting down treatments for aging-related diseases.



South Korea

20% of Koreans have had some type of plastic surgery, and in Seoul, the capital, the number rises to **60%** of 20 year-olds.

By far the most common surgery that Koreans have is a blepharoplasty, or double-eyelid surgery, where a crease is inserted in the eyelid to make the eye look bigger. The two other most popular procedures are rhinoplasties, or nose jobs, and glutathione injections, which slows pigmentation in the skin, thus giving a fairer skin tone.

Many South Koreans view plastic surgery as an essential part of having a successful career. In addition to a resume and references, most employers want a head shot. According to a survey of 760 companies, **93%** of firms required one, and six out of ten human resources managers are influenced by an applicant's appearance at the time of hiring.

The Korean Association of Plastic Surgeons estimates that **15%** of men have had procedures.



Brazil

Another leading country in plastic surgery is Brazil. The majority of surgical requests are focused on body sculpting: improvement to the breasts, abdomen and buttocks, most notably the controversial Brazilian butt lift.

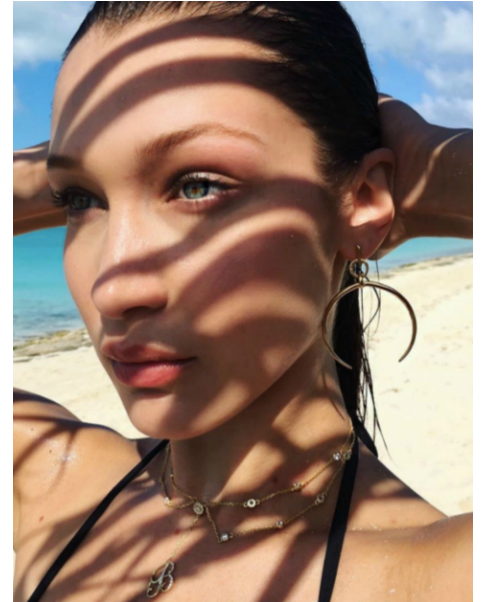
BEAUTY by CONCERN

Skin:

Beauty by concern is certainly booming, with all demographics from Gen Z to Baby Boomers searching for the latest in preventative and solution oriented products and procedures. The top 5 skin problems with the highest average weekly searches include eczema (over 272K avg weekly searches), acne (over 190K a.w.s), blackheads (over 110K a.w.s), varicose veins (over 98K a.w.s), and cellulite (84K a.w.s).

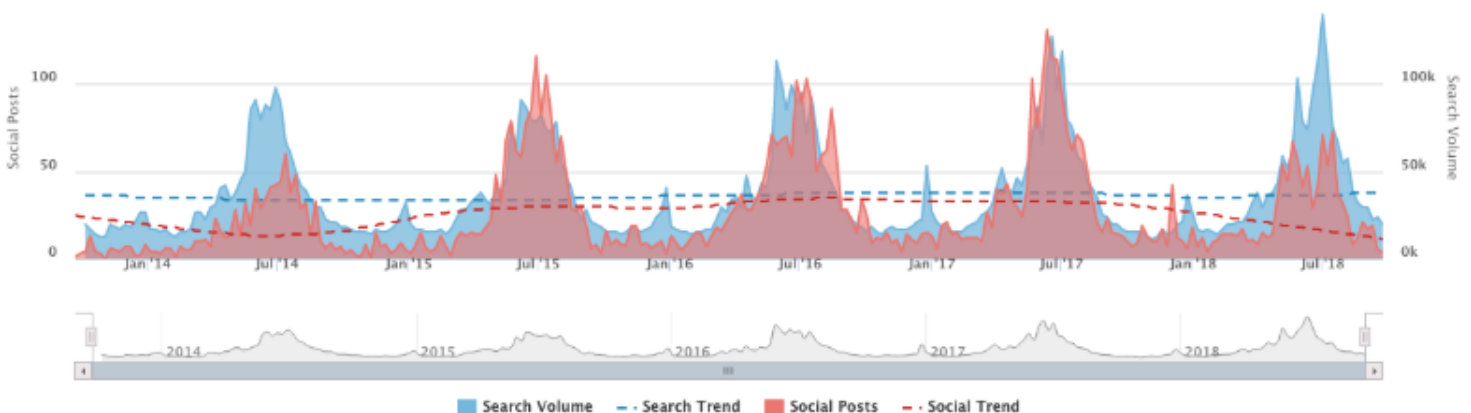
Skin concerns growing in momentum include sunburn, chafing stick, dullness, uneven skin tone, and varicose veins. It's no surprise that sunburn is a top concern, especially as education increases surrounding UV light and the long term impacts of sunlight on the skin including skin cancer, hyperpigmentation, and early wrinkles. L'Oreal is leading the charge in this space by releasing the battery-free La Roche-Posay My Skin Track UV Sensor this week, allowing wearers to seamlessly track their UV exposure via smartphone.

Mineral sunscreen and zinc sunscreen are picking up in popularity (+51%, and +25% respectively) as consumers search for more natural, chemical-free ways of protecting their skin. Top sunscreen brands by product count include Coola, Clinique, Soleil Toujours, Eucerin, and Paula's Choice, all with almost 100% of products at full price.



Seasonal Concerns:

Chafing stick, varicose veins, and sunburn are all highly seasonal trends accelerating YOY in April/May and peaking in June/July. The best time to feature these products or speak to them in an email or social campaign is around this time frame to best align with when the customer is naturally searching for solutions to these skin ailments.

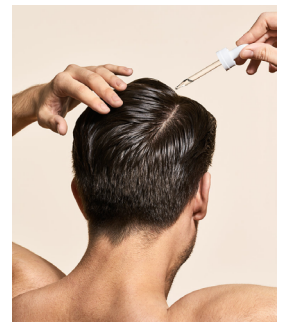


BEAUTY by CONCERN

Hair:

Hair concerns have increased over the last few years for both men and women, with nearly 50 million people in the US alone suffering from hair loss. We're seeing strong interest in hair botox as a possible solution, as it's up 22% in search growth to LY and largely considered an anti-aging procedure that helps with restoring and restructuring the hair by boosting hair fiber and eliminating dullness and frizz. Other top concerns include mens hair loss (+14%), frizzy hair (+10%), and dandruff (+7%), with hair removal, dry hair, and dandruff, all garnering over 50K average weekly searches. Hair loss shampoo and hair supplements are other top trending terms consumers are searching for, indicating that hair health and wellness is certainly a growing beauty category and consumer interest.

A slew of hair brands are making waves in the space, including two standout brands we saw this year at Cosmoprof. Keranique is a brand offering scalp stimulators and regrowth treatments, while cult-favorite Korean brand TS Shampoo offers gender-neutral and clean hair products to promote thick hair. Additionally, there are a number of other established and up-and-coming brands like the D2C brand Hims, focusing on male hair loss and sexual health, Viviscal hair health for women, and even prestige beauty brands like K-Beauty leader Amorepacific.



A Smile Worth 1000 Words:

Preventive beauty goes far beyond skincare. According to the American Academy of Cosmetic Dentistry, around 99.7% of Americans view their smiles as an important social asset. Though whitening is the most popular procedure, more permanent treatments are becoming popular: [Dental reshaping](#) and sculpting misshapen teeth with lasers and [dental bonding](#) allows dentists to actually change a patient's facial structure, resulting in a more youthful appearance.



THE DOCTOR IS IN

There is no denying that in the age of social media, greater importance is placed on appearances than ever before. Our obsession with perfection and self-care has us looking for new and innovative ways to put our best face forward.

Millennials are not waiting for wrinkles or skin problems to appear to begin preventative beauty regimens. A recent study found that nearly 47% of women aged 30 to 34 had already tried injectables, compared to 28% of women aged 35 to 39 and 11% of women aged 40 to 49. Thanks to the openness of celebrities and influencers like the Kardashians, stigmas surrounding cosmetic procedures seem to be disappearing.

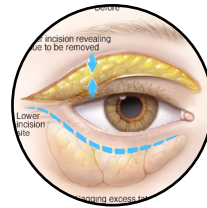


Going Under to Wake Up Younger



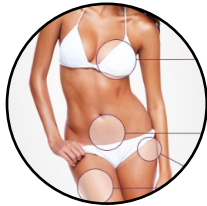
Endoscopic Brow Lift

3 small incisions are made along the hairline to elevate the eyebrows and minimize forehead wrinkles by eliminating wrinkle-causing muscles. 2 hour procedure, 14 day recovery.



Blepharoplasty

[Eye Bag Removal](#): Surgeon makes an incision and removes excess fat and skin around the eyes to tighten the skin. 10 day recovery.



Mommy Makeover

Usually includes breast augmentation, breast lift, butt lift, liposuction, tummy tuck, and vaginal rejuvenation.



Platysmaplasty

[Neck Lift](#): the neck is one of the most obvious indicators of age - this 2 hour procedure removes excess skin from the neck and requires an overnight hospital stay.


Doctor Knows Best

Social media influencing is no longer exclusive to street-style bloggers and makeup gurus. Doctors and cosmetic providers such as Dr. Miami, Dr. Jason Diamond, Nurse Jamie, and Dr. Ourian have co-opted the space and used it as a means of pushing products and educating followers about different cosmetic treatments.

Dr. Simon Ourian

2,161 posts 3M followers 536 following

[Follow](#)




The doctor behind the flawless appearance of the Kardashian/Jenner clan. With nearly 3M Instagram followers, Dr. Ourian specializes in cosmetic dermatology and non-surgical contouring/enhancements. With his luxury skincare line, Epione, he is the one stop shop for aging flawlessly.

Dr. Dennis Gross

995 posts 15.6K followers 79 following

[Follow](#)



Dr. Gross is well known in the beauty and skincare industry. With nearly 94K followers on his Instagram, his successful skincare line is sold in Sephora and various other e-commerce websites such as QVC and ASOS. Specializing in anti-aging innovations, Dr. Gross prides himself on offering cruelty-free serums and peels for easy, at home treatments.

NON-INVASIVE TREATMENTS

Taking the Work out of “Getting Work Done”

Part of the normalization of non-invasive treatments can be credited to an increase in education and outreach. Allergan, the producer of Botox, and one of the largest pharmaceutical companies in the world, made \$2.2 billion in 2017 on this product alone. This year they unveiled Spotlyte, their own online resource dedicated to addressing the fears and questions associated with aesthetic treatments. Well before Spotlyte, RealSelf has been facilitating 500,000 unique monthly conversations between doctors and consumers for years and recently raised \$40 million in new funding in 2018.

Hacking Aging

In addition to common beauty ailments and skin problems, anti-aging and preventative skin care is a major area of growth. Beauty treatments are surging in popularity from minimizing wrinkles to overall body wellness with a rising interest in non-invasive and/or at-home treatments. We're seeing strong search growth to LY for blue light therapy (+84%), microneedling (+77%), infrared sauna (+21%), and aqua peels (+17%). While blue light therapy is growing in popularity as a treatment for acne, weariness of blue light exposure from LED lights, fluorescent lighting, and digital sources such as computer and phone screens and the negative impact on eye health is becoming a larger concern. It has been linked to digital eyestrain and retina damage including macular degeneration, leading to an increase in consumer searches for blue light blocking lenses, up 84% in search growth to LY.



CRYOTHERAPY

Cryotherapy involves the use of freezing or near-freezing temperatures to help with a range of concerns, including slowing or reversing skin aging, supporting fat loss, and preventing chronic diseases. Can be localized or performed on the entire body.



MICRONEEDLING

During the 15-minute procedure, an aesthetician glides a handheld device with a series of tiny needles across the surface of the skin, creating microscopic lesions to trick the skin into repairing itself and promoting collagen growth.



OXYGEN FACIAL

“Directly applying oxygen to the skin surface is believed to strengthen the skin’s elasticity and help eliminate acne-causing bacteria. It even is able to provide a plumping effect to reduce fine lines and wrinkles and even out skin tone.



ALCHEMY 43

A chain of medi spas known as the “Drybar of Botox” in the beauty industry, Alchemy 43 offers an inviting, social-media friendly space to get “microtreatments” – a stark contrast from getting injections in sterile doctors’ offices.



ULTRASOUND STIM

Originally developed to combat certain types of cancer, the procedure uses sound waves to inflict topical thermal injury. When used for aesthetic purposes, treatments like V-Zet stimulate natural collagen production, causing the skin to lift, tighten, and tone.



SKIN LAUNDRY

Skin Laundry’s Signature 2-Step Facial deep cleans and rejuvenates skin in 15 minutes with no downtime. It combines YAG laser energy with Intense Pulse Light (IPL) to deep clean and target redness, pigment, inflammation, and bacteria.

SUPERFOODS

In a holistic approach to health and skin, what you put in your body is just as important as what you put on it. Companies like CAP Beauty, TULA, and recently-launched Yensa are investing in the connection between skincare and superfoods, offering skin and alimentary solutions alongside one another. Following the popularity of 23andMe, Viome is similarly a home testing service that can determine the best foods for your skin and health. We ourselves considered the impact of ingestibles in our [Wellness Report](#). After looking at over 40 terms from superfoods to different types of vitamins, we have identified some of the top growing ingredients. Whether you incorporate these into ingestibles or your weekly face mask, these are ingredients that are imperative to preventive beauty.



AVOCADO



SEAWEED



PREBIOTICS



MORINGA



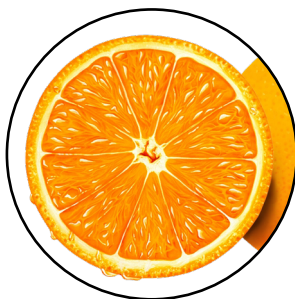
TURMERIC



MANUKA HONEY



CAFFEINE



VITAMIN C



ROSE HIP OIL

WORKOUT / WELLNESS / SLEEP

Science has proven that working out has anti-aging benefits that go beyond weight loss and muscle toning. [Exercise](#) can slow down the aging process, [firm your skin](#), and positively impact one's overall health. These preventative benefits might be a few reasons why [60.9 million people](#) in the U.S. held fitness club memberships in 2017.

Self-Care Spa

With spas now geared more towards preventative care, men are now representing 45% of spa-goers. The different types of self-care available at these spas include [lymphatic drainage massages](#) that prevent fluid build up throughout the body and increase oxygen and blood flow; [Shapehouse](#), a traditional sweat lodge designed to promote weight loss, better skin, and higher energy; and [Tanaka facial massages](#), which help reduce wrinkles.



Beauty Sleep

Sleep continues to be the new wellness. With [70M Americans](#) experiencing sleep issues, consumers are waking up to the long term negative impacts of sleep deprivation. From \$150-an-hour [sleep coaches](#) to a proliferating market of products and technologies targeting sleep and wellness, there is truly something for everyone. [Deja](#), the popular pillowcase start-up, provides layers that allow for 8 clean nights of sleep without repeat. On the app side, [Eight Sleep](#) and [TomorrowSleep](#) are exploring REM and sleep apnea tracking.



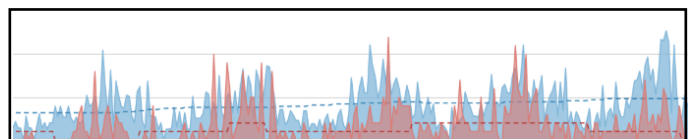
The Wellness Workout

Cult-like fitness studios from [SoulCycle](#) to [Barry's BootCamp](#) are expanding their horizons beyond the workout, introducing wellness as a part of their goal. Their mission ranges from promoting overall wellness via candlelit classes to the promise of personal growth and crystal usage a la [Knockout](#). With the decline in alcohol consumption and rise in the wellness industry, even WeWork has now launched [Rise By We](#), a wellness center offering spa services, a health café and boutique fitness classes.



Active Beauty

Beyond post-workout facials and massages, the beauty industry is integrating into the wellness lifestyle and promoting the idea that your beauty routine should be a central part of your fitness regimen. Active beauty is makeup designed to be worn while working out. Some brands leading this market are [Sweat Cosmetics](#) and [Clinique](#).



Sweat-proof Makeup Trend Curve:
https://app.trendalytics.co/#/trend/sweat_proof_makeup

SEX, DRUGS & THERAPY

SEX FOR HEALTH

The days of sex toys being taboo has come and gone, and the rise of sexual wellness as a form of self care has asserted itself in the retail and beauty industries. NYC-based startups [Unbound](#), a subscription service, and [Dame](#), a sex toy disruptor, are just two companies innovating within the field. [Roman](#) caters to the male market, addressing erectile dysfunction, which affects 40% of men by the time they're 40. Looking to take it one step further? [V Spot](#) medi spa offers an entire menu of vagina related services from steaming to a "Femlift" or a vagina face lift.



GOING GREEN



CBD oil and hemp seed oil both come from the marijuana plant, but lack the psychoactive properties that THC is known for. CBD has been shown to have a positive impact on the body, with [research concluding](#) that it has anti-inflammatory, stress relief, and acne prevention properties. Now companies are rushing to add it to beauty and self-care regimes, from CBD massages at Chillhouse to a long list of beauty brands like [Lord Jones](#) and Milk Makeup that have started CBD and hemp seed oil lines, respectively. Michael Pollan's *How to Change Your Mind* and a microdosing phenomenon are what's on the horizon.

MIND SPAS

With self care and preventative beauty comes the most important form, mental health. Holistic self care, including [serotonin rich diets](#) and caffeine reduction are two methods that demonstrate the way in which the mind is impacted by external factors. There has even been evidence of how [mold](#) can impact your mental health and how other physiological factors, like having an [office space with a window](#), can influence your mental state.



20% of people aged 55+ experience some mental health concern & older men are the group with the highest rate of suicide.

AT HOME CARE

10 Most Buzzworthy Products

These were the brands and products with the most social actions (likes, comments, shares, retweets, and repins) in the past year. Consumers connected with products based on ingredient effectiveness, peer testimonials, editorial reviews, and largely pastel packaging for their at-home regimens.



Glossier Zit Stick
7,856 actions/post

Runners Up:
Invisible Shield sunscreen
10,150 actions/post
Super Bounce serum
15,096 actions/post



SuperGoop Unseen Sunscreen
436 actions/post

Runners Up:
100% Mineral Matte Screen SPF 40
620 actions/post
Glow Stick Sunscreen SPF 50
420 actions/post



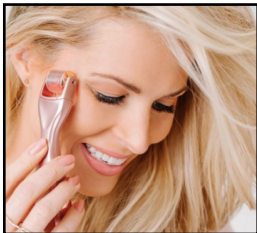
Kiehl's Youth Dose Eye Treatment
3,050 actions/post

Runners Up:
Buttermask for Lips, 3,671 actions/post
Turmeric & Cranberry Seed Energizing
Radiance Masque 1,928 actions/post



**Sunday Riley Juno Antioxidant +
Superfood Face Oil: 1,446 actions/post**

Runners Up:
Auto Correct Brightening + Depuffing Eye
Contour Cream 1,878 actions/post
U.F.O. Ultra-Clarifying Face Oil
2,000 actions/post



BeautyBio GloPRO
562 actions/post

Runners Up:
GloPro Lip Edition, 327 actions/post
The Pout Volumizing Lip Serum
345 actions/post



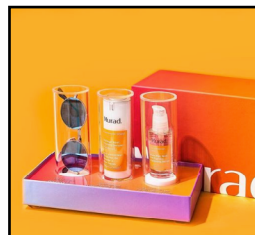
**Drunk Elephant C-Tango Multivitamin
Eye Cream**
3,052 actions/post

Runners Up:
T.L.C. Sukari Babyfacial, 1,155 actions/post
Virgin Marula Luxury Facial Oil
742 actions/post



Estee Lauder Adv. Night Repair Serum
2,548 actions/post

Runners Up:
Revitalizing Supreme+ Wake Up Balm & Eye
Gelee, 6,208 actions/post
Daywear Multi-Protection Anti-Oxidant
Creme, 10,170 actions/post



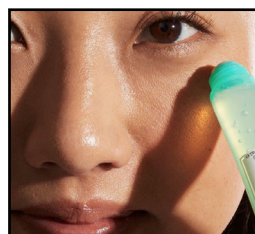
Murad Rapid Age Spot + Pigment Serum
685 actions/post

Runners Up:
City Skin Age Defense SPF 50
654 actions/post
Age Reform Invisiblur Perfecting Shield
568 actions/post



SkinCeuticals C E Ferulic
491 actions/post

Runners Up:
Physical Fusion UV Defense
472 actions/post
LHA Cleanser gel
1,178 actions/post



Origins No Puffery
5,082 actions/post

Runners Up:
Clear Improvement Charcoal Honey mask
2,302 actions/post
GinZing Refreshing Eye Cream
1,949 actions/post

BRANDS & STARTUPS

D2C & Startups



Prestige Brands



Makeup Brands Doing Skincare



KEY TAKEAWAYS

- 1. Technology is driving change in the preventative beauty market from all sides. Not only have technological innovations expanded the availability and accessibility of non-surgical treatments, but also the digital revolution has caused a spike in knowledge and interest of the once taboo subject.*
- 2. The major disruption in this market has been caused by Millennial interest: Botox use has increased by 87% amongst young consumers, signaling a macro shift from reactive to preventative and active measures. Interest in “curing death” will increase as education and innovation expand in tandem.*
- 3. Mental health is increasingly being recognized as a pinnacle of longevity. From apps to treatments, wellness experiences, and even experimental microdosing, start with the mind when addressing the factors that age the body and skin.*
- 4. Education is the key to expanding this market. From online forums like RealSelf and Spotlyte, to social media affording doctors the platform to discuss derma skincare directly with consumers, the first point of contact is a digitally native one.*

CITATIONS

[Page 3] What Preventability Means & The Future of Science

<https://www.allure.com/story/3d-printing-skin>
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[Page 4] Market Share

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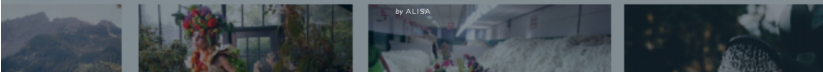
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