

# FUTURE OF BEAUTY

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UNIVERSITY OF HOUSTON SPRING 2019











**LUSH** FRESH HANDMADE COSMETICS

**LUSH**  
FRESH  
HANDMADE  
COSMETICS

**LEADERS**  
리더스

**LEADERS**

**NATURE REPUBLIC**

**NATURE REPUBLIC**

**ALL MASK STORY**

**the SAEM**

**the SAEM**

**MISSHA**

HAPPY BIG SALE **50%** SALE

HAPPY BIG SALE







beauty



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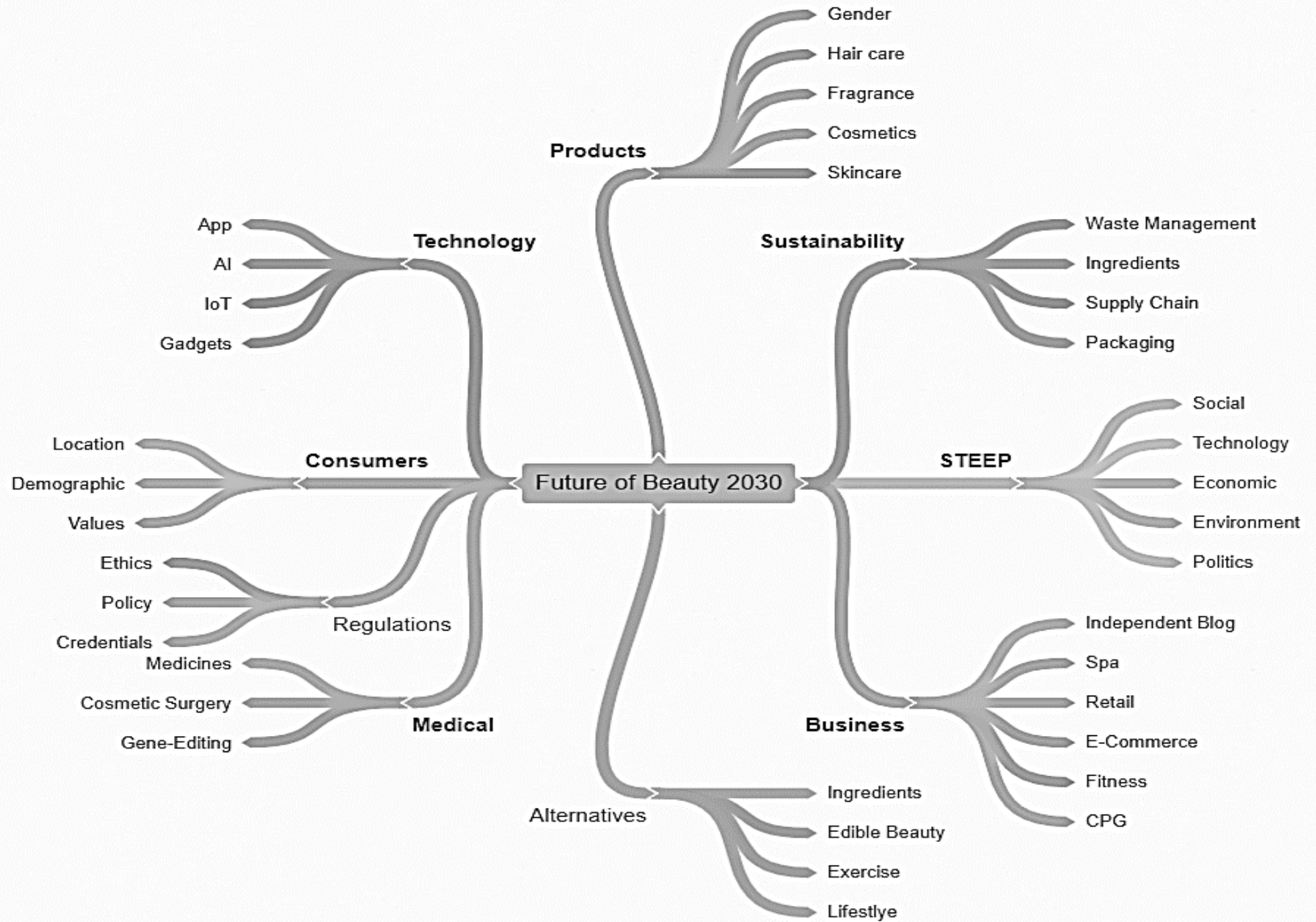
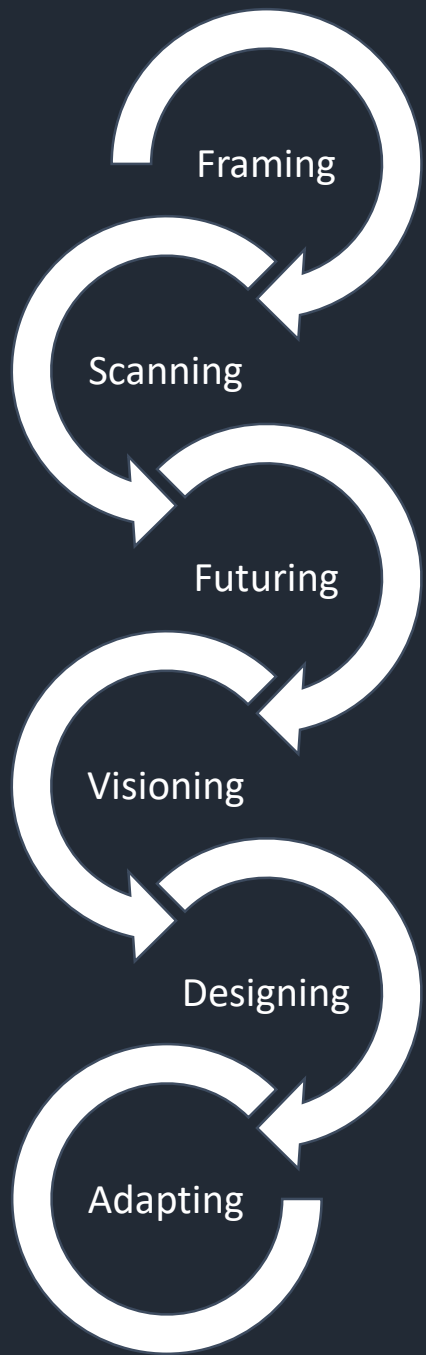


What will the future  
look like for the beauty  
industry in 2030?



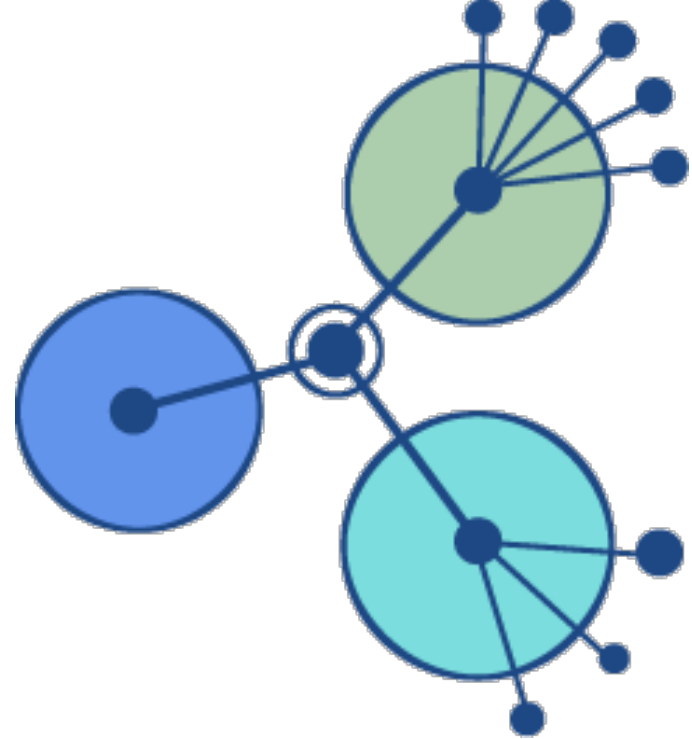
# Methodology







# 6 Drivers





1

# Tech-enabled



1

Tech-enabled





2

# Sustainability Credibility





# 3

# Competitive Landscape

RETAIL

## Amazon is launching Belei, its first skin care line, as it pushes further into private-label products

PUBLISHED WED, MAR 20 2019 • 10:40 AM EDT | UPDATED WED, MAR 20 2019 • 12:18 PM EDT

Lauren Thomas  
@LAURENTHOMASX3

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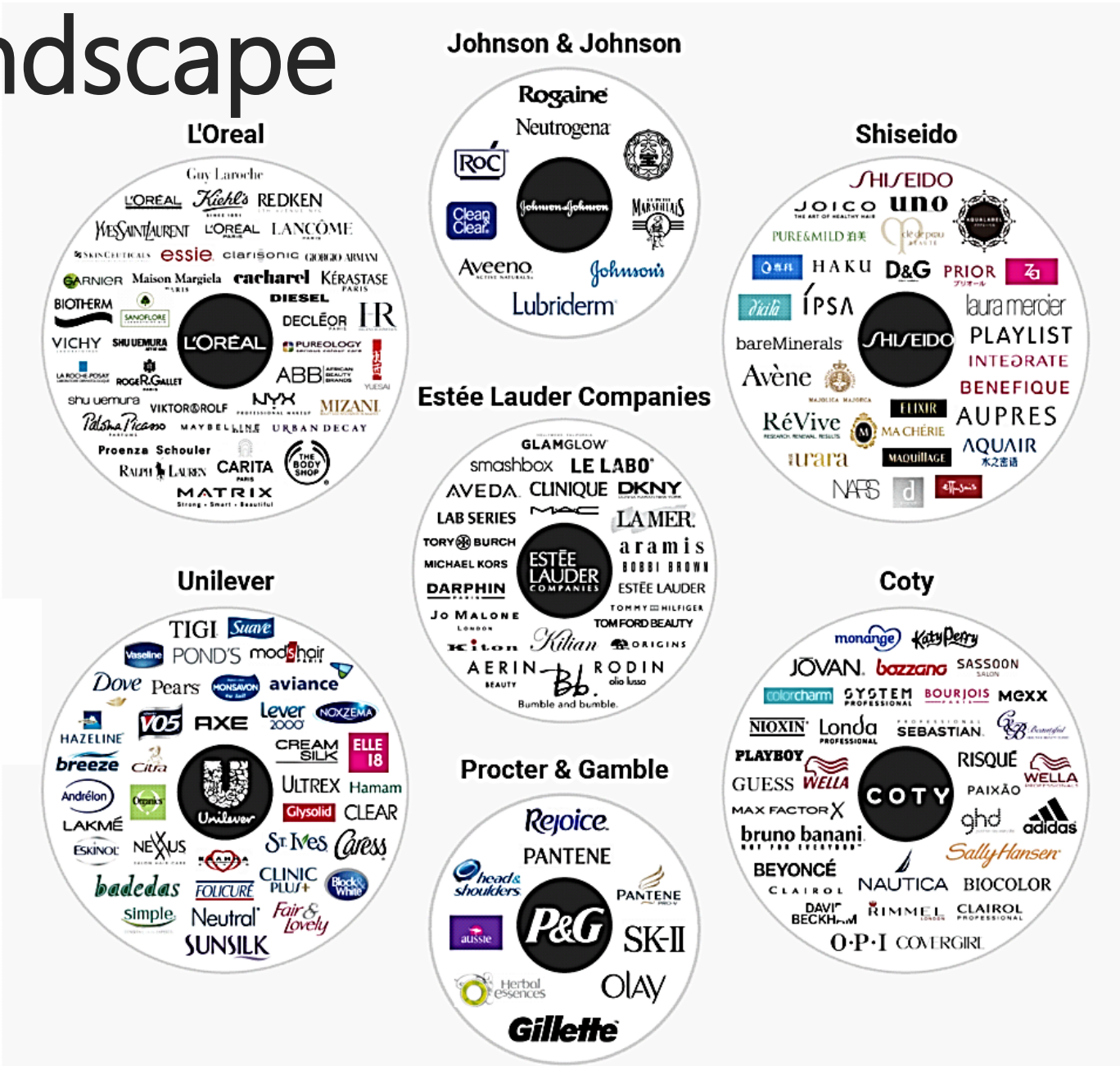
## Glossier started as a beauty blog and is now valued at \$1 billion



By Sara O'Brien and Kaya Yurieff, CNN Business  
Updated 4:44 PM ET, Tue March 19, 2019

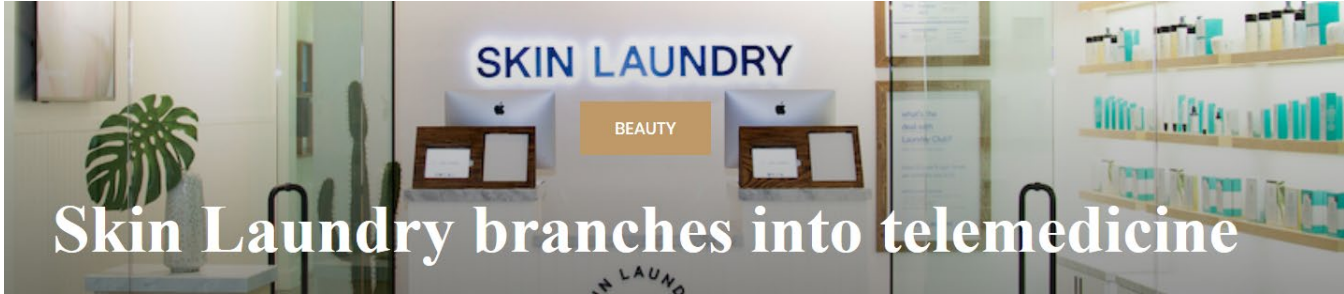
BRIEF

## Saks Off Fifth launches private label beauty line



# 4

## Inner Beauty and Wellness



Skin Laundry branches into telemedicine

Medical care meets beauty treatment at local DripLab

**Barneys. Neiman Marcus. America's stores are taking the leap into cannabis products**

By Nathaniel Meyersohn, [CNN Business](#)

Updated 4:29 PM ET, Wed February 13, 2019

**THE BEAUTY INDUSTRY FEEDS ON ANXIETY. NOW IT'S SELLING ANTI-ANXIETY PRODUCTS**

By [Sangeeta Singh-Kurtz](#) · January 17, 2019

**BOBBI BROWN'S JOINED FORCES WITH WALMART TO MAKE BEAUTY INGESTIBLES UBER-ACCESSIBLE**



GOOD LOOKS  
by RACHEL LAPIDOS, APRIL 1, 2019

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5

# Inclusiveness

## South Korean women begin to resist intense beauty pressure

By JUNG YOON KIM February 5, 2019

MATT SIMON SCIENCE 03.11.19 11:45 AM

## THE GENDERLESS DIGITAL VOICE THE WORLD NEEDS RIGHT NOW

CHANEL

MAKEUP FOR MEN







# Regulation and Trust



*Last Federal Law Regulating Cosmetic Passed in 1938*



# Regulation and Trust

HEALTH • HEALTH

## That Moisturizer You're Slathering on Your Face Isn't Regulated



RealSelf Partners with Playwright and Performance Artist Susan Lieu to Educate Consumers About Elective Surgery Safety and Provide Guidance on Researching Doctors

RealSelf Introduces New Content to Inform Consumers About Medical Certifications, Hosts February 9 Performance of "140 LBS" Play

**realself.**

NEWS PROVIDED BY  
[RealSelf](#) →  
Feb 06, 2019, 11:00 ET

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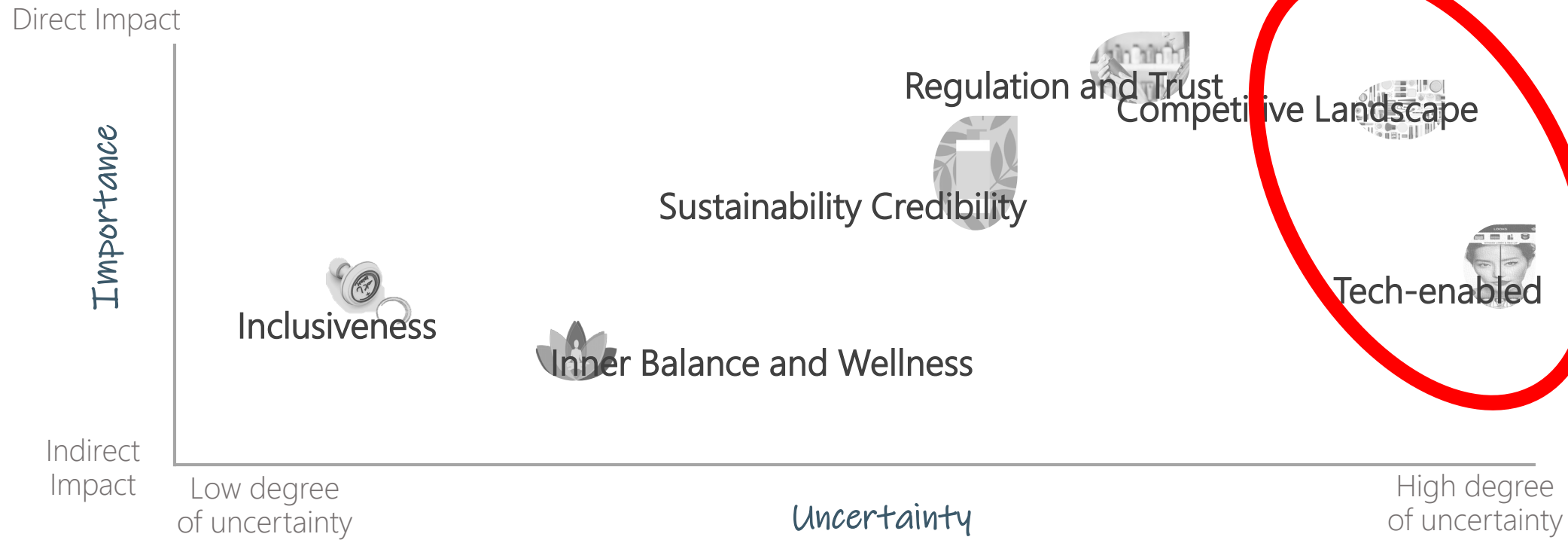




# Future Scenarios

The Global Business Network 's 2x2





Traditional players prevail

Competitive Landscape

New players take over

*Will new players (beauty tech start ups) prevail or will traditional players lead?*

Tech that makes decision for you

Tech- Enabled

Tech that helps you make better decision

*Will technology focus on making the best decision for us or will it help us make better decisions?*



## Manufactured Beauty

Tech that makes  
decision for you

Traditional  
players  
prevail

Competitive

Enabled



## Me, Myself, and I

Landscape

New  
players  
take over



## Beauty for Good

Tech that helps you  
make better decision

Tech



## Transparency for All

Tech that makes  
decision for you

# "Manufactured Beauty" World...

Traditional  
players  
prevail



Tech that  
makes decision  
for you

# "Me, Myself, and I" World...



New  
players  
take over

Traditional  
players prevail

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"Beauty for Good" World...

Tech that  
helps you make  
better decision

New  
players  
take over

# "Transparency for All" World...



Tech that  
helps you  
make better  
decision





What is your  
preferred  
future?

How can I  
influence the  
preferred  
future?

~~Where did this  
come from?!~~

That is pretty  
cool.

~~Let's focus  
on what we  
are good at  
and get better  
at them.~~

~~It probably  
won't last~~

~~hmm, maybe  
it is here to  
stay but not  
relevant~~

What do  
they mean  
for us?

What are the other  
mega trends should I  
be aware of?

I'm curious to  
learn more

