

PHILIPS

**Future of
health
and beauty**



Introduction

Is the future of beauty hyper-real or super-natural? Do we desire a look made for the screen, or a life lived beyond it? Is wellness found in plants, the Arctic, the deep oceans - or is it made in a lab? Do we find restoration in hands-on rituals, or does it come from a device?

In the last year alone, the patterns of our lives - the ways in which we work, rest and play - have shifted beyond recognition. People are now asking themselves: how do I want to go forward? How do I want my life to change? Beauty and personal care is the intimate, daily space in which we remake our relationships with our selves and choose how we express ourselves to others. As such, it too, has transformed.

Our mission at Philips is to improve people's lives through meaningful innovations, from personalised grooming gadgets that cater to your individual style and skin suitability, to expert dental care and advice available at the touch of a button. Our aim is to encourage people to rethink their personal care regime as a holistic self-care practice and seek the expertise, tools and solutions that fulfil personalised health and wellbeing goals.

This report presents eight beauty and personal care trends shaping the UK today - from social media movements to the latest cult ingredients and the smartest beauty devices. We measure the trends in their current form using search and social media data - then predict where they may go next, through identifying emerging technologies and "future casting" them against the latest developments in artificial intelligence, augmented reality, virtual reality, customer experience, media and social trends.

We hope this report offers an insight into the latest beauty and wellness trends which are continually evolving, as well as the go-to gadgets and brands that are adapting these to meet the needs of the consumer today and tomorrow.

Steven Griffiths, Philips UKI Personal Health Leader

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Reclaiming reality

People are pushing back on impossible beauty ideals with a movement to reclaim their natural, unaltered bodies as perfect just as they are.

Fitness influencers post posed vs. unposed selfies to demonstrate that not even they look like the photos they create. Gen Z influencers such as Emma Chamberlain openly share their experiences with acne in videos on TikTok and YouTube. Instagram cosmetic surgery accounts call out the array of treatments celebrities have had, helping their followers know not to trust every image they see.

Dr Steven Harris, a top London cosmetic doctor, is leading a revolt against over-exaggerated lip fillers and “alienised” facial forms. Huda Kattan, creator of Huda Beauty, is campaigning for influencers and beauty brands to be transparent about when pictures have been digitally enhanced or altered.

The “body positivity” trend is continuing to grow, as more influencers and consumers embrace this movement in their produced and consumed content - portraying their own belly rolls and stretch-marks, acknowledging the power of imperfection being authentic and beautiful.

Body acceptance activists are championing “body positivity”, advocating more radically for brands and media to represent real bodies, not only the minority of ‘perfect hourglass’ curvy figures. Fashion retailers are responding by rethinking everything from casting to clothing sizes. Reclaiming Reality is a movement calling for real diversity - not just the token gestures towards it that have, too often, been the brand and media response.



Conversations in culture

Activist and model Lou Northcote created the #FreeThePimple movement (28,493 Instagram posts) after appearing on Britain’s Next Top Model with acne.

Celebrating growing out grey hair on hashtags such as #SilverSisters (250,891 Instagram posts), #grombre (182,284), and #DitchTheDye (81,425).

Brands taking action

Starface hydrocolloid “pimple patches” use fun designs (stars, rainbows, etc) to destigmatise the experience of having a spot.

Clothing brands such as Reformation, Girlfriend Collective, and We Are Kin move away from separate ‘plus size’ collections to offer fully size-inclusive fashion up to a UK 28.

Hearst’s Project Body Love partnership with Philips aims to change the way women feel, think and speak about their bodies, since research revealed that only 4% of women feel beautiful.¹



Where next?

The MySize app uses your phone’s accelerometer and gyroscope to measure your body’s exact dimensions – which retailers can cross-reference with product size data to offer custom, super-accurate size recommendations.

The Advertising Standards Authority enforcing truth in advertising claims more assertively, with influencers threatened with platform bans if they do not accurately disclose image manipulation on sponsored posts.

Blockchain verification and other authenticity marks to certify images as “real” and trustworthy.

“I’ve dyed my underarm hair blue, yellow, pink, and I trim it and condition it. For me, it’s a fun form of self-expression. The same goes for my unibrow – I used to be insecure about the bushiness, especially when modelling clients would ask to thread my eyebrows, but I’ve realised body hair makes me authentically me.”⁶

@aaliyahramseyy



Let’s look at the data



Instagram
#AcnePositivity

208,503 posts



TikTok
#AcnePositivity

53.9M views²



Instagram
@IGFamousByDana

195,400 followers³



TikTok
#BodyHair videos

205.3M views⁴

Developing diversity



Diversity and inclusion within beauty and self-care is mandatory to ensure people from all walks of life, culture and experiences can see themselves reflected in personal care experiences they engage with and consume.

This is rapidly evolving to meet the needs of society today. In 2017, the launch of Fenty Beauty offered 40 foundation shades for all ethnicities. Fast forward four years and brands are supporting a breadth of diversity, for example, casting trans and gender non-conforming models for catwalks and advertising campaigns. Attitudes and definitions of diversity have developed – and politicised. Black Lives Matter re-energised a generation to the continued crisis in racial equality and re-emphasised the importance of encouraging consumers to have a much deeper conversation about the structural relationship between racism and health inequalities. One way in which people are putting their views into practice authentically is by seeking out and supporting black-owned businesses. Similarly, trans and non-binary awareness has shifted away from models and celebrities towards protecting fundamental legal rights that are in jeopardy. Mental health discussions are moving beyond the safely corporatised world of mindfulness apps and ‘resilience’, into a much deeper discussion of neurodivergence and mental illness.

Growing awareness of adult ADHD has enabled thousands of people to better understand themselves and their challenges, and more serious personality disorders such as borderline and bipolar are being destigmatised.



As such, the future of diversity & inclusion is not linear and is continually becoming increasingly multi-faceted. It is less about new demographics being ‘discovered’ – and much more about how people and businesses can support evolving social and health needs for people to feel they are represented and connected in society.

Conversations in culture

Twitch streamer and YouTuber Sweet Anita is using social media to educate people about coprolalia and Tourette Syndrome.

Black Pound Day encourages people to spend money with local and online UK Black-owned businesses on the first Saturday of every month.

Brands taking action

Rihanna’s Savage X Fenty Vol. 2 collection in October 2020 offered a capsule collection of lingerie for men, designed in conjunction with Christian Combs and modelled on a diverse range of body types, including plus-size men. “Inclusivity for me has always been something second nature,”⁷ the designer commented in an interview before the show premiered on Amazon Prime.

Gucci Beauty 2020’s campaign featured Ellie Goldstein: a model with Down’s syndrome.



Where next?

Greater visibility for disability awareness in the inclusivity conversation – especially ‘invisible’ disabilities, as “long covid” leaves thousands with chronic pain and fatigue issues.

Diverse options for self-expression need to be built into emerging digital representation technologies. Facebook has just overhauled its Oculus Avatars system to be “more expressive, more customisable, more diverse”⁸, updating its face category to allow for better personalisation, as well as new body types, hairstyles, clothing, makeup, and movement options.

Let’s look at the data



TikTok
#ADHDtiktok

473.6M views⁹



Searches
“ADHD in adults”

+83% YOY¹⁰



Instagram
#BlackOwnedSkincare

123,006 posts¹¹



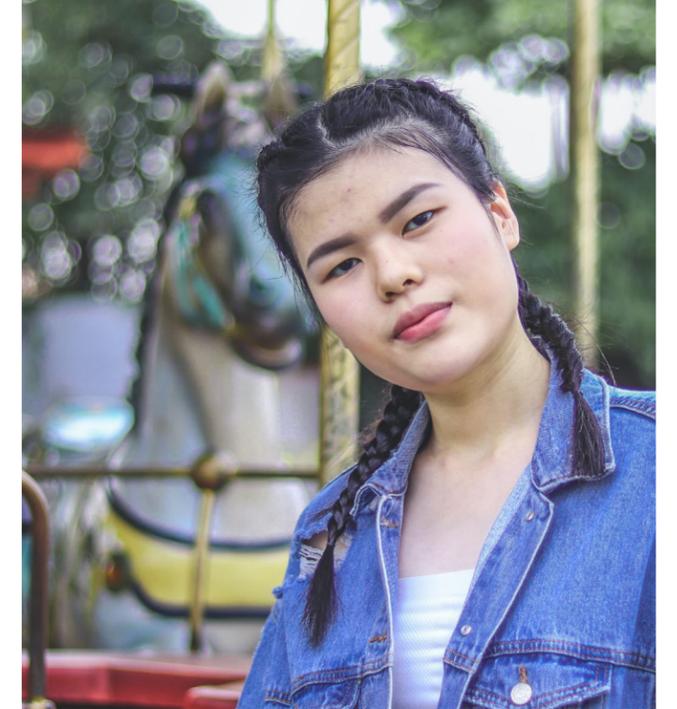


Skinimalism

“Skinimalism” is focused on natural, minimal, low-key looks to allow your real skin – texture, blemishes, pores, pigmentation and all – to shine through.

It promotes quality over quantity and enhancement over coverup, signalling a shift away from unrealistic beauty standards of “flawless skin” in favour of naturalness and authenticity. Similar to the “skip-care” trend originating in South Korea, beauty fans are embracing more intentional skincare and makeup routines with fewer, more targeted staple products and ingredients that only give their skin what it really needs. Skincare proved a bright spot for the beauty industry over the course of the COVID-19 pandemic - but many consumers over-complicated their skincare routines as a result of boredom and too many hours of staring at their faces on Zoom. Fatigued by multi-step regimens, harsh exfoliants and lacklustre results, excitement is now growing around a less-is-more approach that is gentler on the complexion - and also gentler on your bank balance and the environment. Skinimalism connects to a desire to be more conscious about purchasing behaviour, not only stripping back skincare ingredients and routine for simplicity and effect, but also reducing waste and excess packaging for obvious ecological benefits.

The minimalist aesthetic is not just skin deep, so to speak – Skinimalism is about having a gentler impact on the planet, as much as your skin.



Conversations in culture

#2016vs2021 challenge: Makeup artists on TikTok and Instagram contrast the two styles by creating one on each side of the face. 2021 make-up is much lighter and dewier compared to the heavy, matte look of 2016.

Brands taking action

CeraVe – Simple, affordable, dermatologist-approved products that saw a boom in popularity in Spring 2020, as TikTok skincare fans and dermatologists (“DermTok”) promoted the brand.

REN – Their #WeAreAllies campaign breaks with business norms to reach out to competitor brands such as Caudalie and Biossance to unite on a campaign for sustainable packaging.



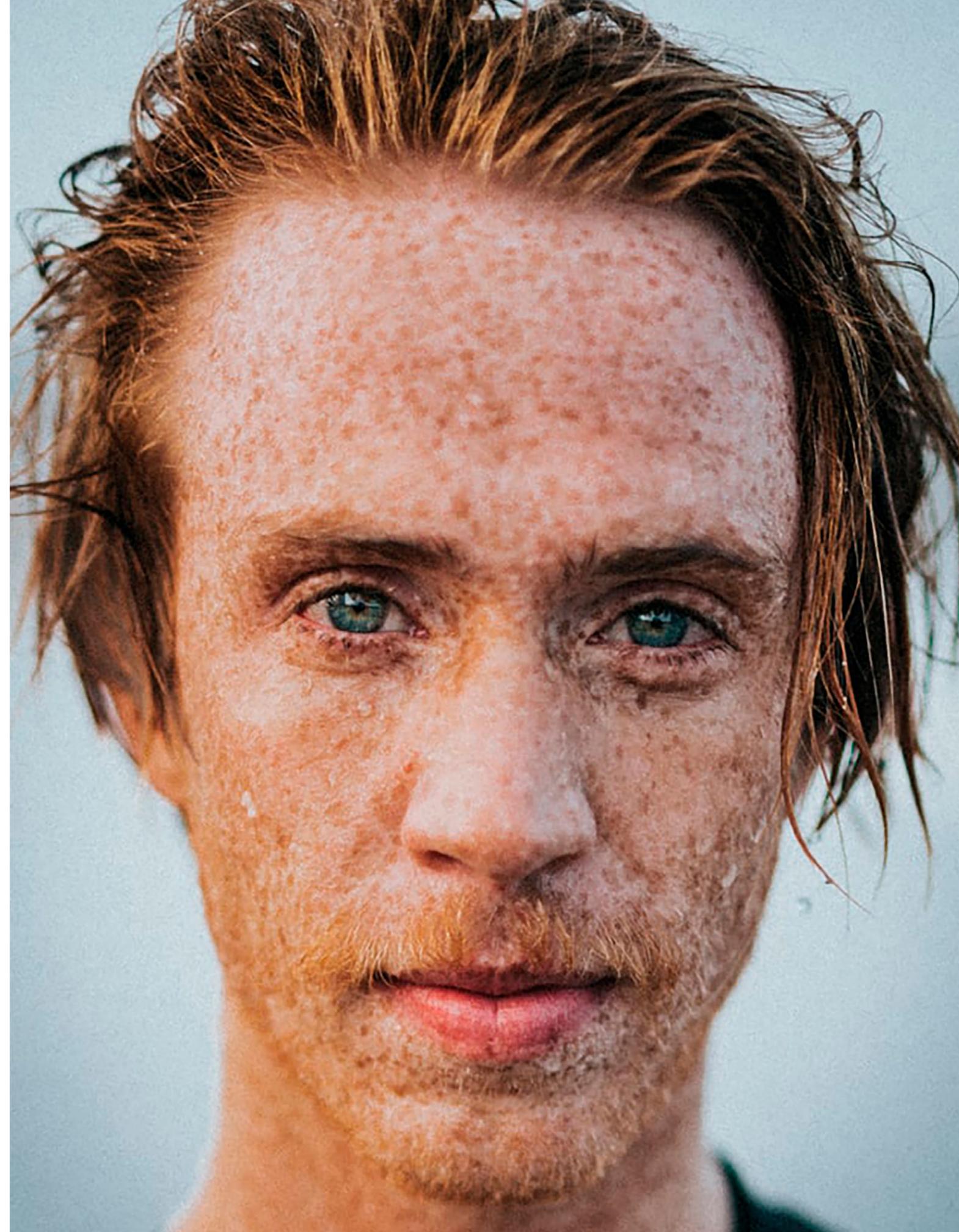
Where next?

AI-assisted skin imaging - whether in-store or via phone camera - diagnoses and prescribes the exact products the customer needs, enabling them to buy less-but-better.

- Micro-manufacturing technologies enable personalised products that deliver the exact mix of ingredients needed.
- A revival of multitasking, all-in-one beauty products combining colour cosmetics, texture (gloss, highlight, etc) and skincare effectiveness, for a minimalist yet functional beauty approach.
- Increasing use of innovative, minimalist, refillable, recyclable and/or up-cyclable packaging.

“I can’t believe it took me so long to figure out what I needed was LESS coverage... This evens out my skin tone just enough. It still looks like my skin, freckles and all.”¹⁸

Review of Glossier’s Skin Tint



Let’s look at the data



Searches
“Basic skincare routine”

+126% YoY¹⁴



Searches
“CeraVe”

+183% YoY¹⁵



Tiktok
#2016vs2021 makeup challenge

170.2M views¹⁶



Pinterest searches
“natural everyday makeup”

+180% YoY¹⁷



Hormonal awareness

No longer do we think of 'mind' and 'body' as separate domains - as people become more aware of the power of our hormones to influence body, health, mood and wellbeing on every level.

Health indicators are increasingly being tracked on our devices, from steps, to nutrition and heart health. Old cliches of "moodiness" at the "time of the month" are being replaced by more sophisticated understandings of how hormones rise and fall - and how people can optimise their energy levels and exercise performance by understanding their body's natural rhythms. Fitness influencers have begun talking openly about the health impacts of maintaining a very lean look - and many are actively gaining weight in order to restore their healthy menstrual cycle.

Men's fitness magazines educate on testosterone-boosting foods and exercises for maximum gains. New books and podcasts on the menopause and menstrual cycle educate people on the changes their bodies are going through and offer guides for "hormonal repair" and reset, using diet, sleep and relaxation techniques to bring disordered metabolisms back into balance.

People are also becoming more aware about how pollution and environmental factors influence our bodily hormonal functions. Epidemiologist Shanna Swan reports in her book 'Countdown' that "Most couples may have to use assisted reproduction by 2045", as pesticides and other manmade chemicals act as endocrine disruptors on human fertility, dramatically lowering fertility in both sexes.

Informed consumers are seeking out glass packaging for food as a means of avoiding BPAs and other disruptive chemicals in plastic.



Conversations in culture

Celebrity Meg Matthews book on menopause, 'The New Hot: Taking on the Menopause with Attitude and Style' (Oct 2020).

Davina McCall recently told her story through a channel 4 documentary – Sex, Myths and the Menopause (May 2021).

Shannah H. Swan & Stacey Colino released 'Count Down: How Our Modern World Is Threatening Sperm Counts, Altering Male and Female Reproductive Development, and Imperiling the Future of the Human Race' (Feb 2021).

Brands taking action

Menstrual tracking app Clue is launching a birth control app based on cycle-tracking methods to predict fertile days.

Olympian Jessica Ennis-Hill's fitness app Jennis CycleMapping is launching a cycle-mapping feature, helping users map their training to their menstrual cycles "and reconnect with your body like never before".



Where next?

Fitness apps programming and recommending workouts appropriate for each stage of the menstrual cycle, for peak performance.

Increasing interest in natural ways to balance hormones, e.g. valerian root, black cohosh, flax seeds, and evening primrose for female hormones - and ingredients such as fenugreek and ashwagandha for testosterone.

Medical providers offering 'baseline' hormone level tests to younger, pre-menopause women, in order to identify their exact, individual hormone profiles to use for potential HRT supplementation in the future.

Greater awareness of infertility as a male issue, with a rise in services making it easier for men to get their levels checked as a preventative measure.

Let's look at the data



UK Google Search
"Hormone imbalance"

+83% YOY²⁰



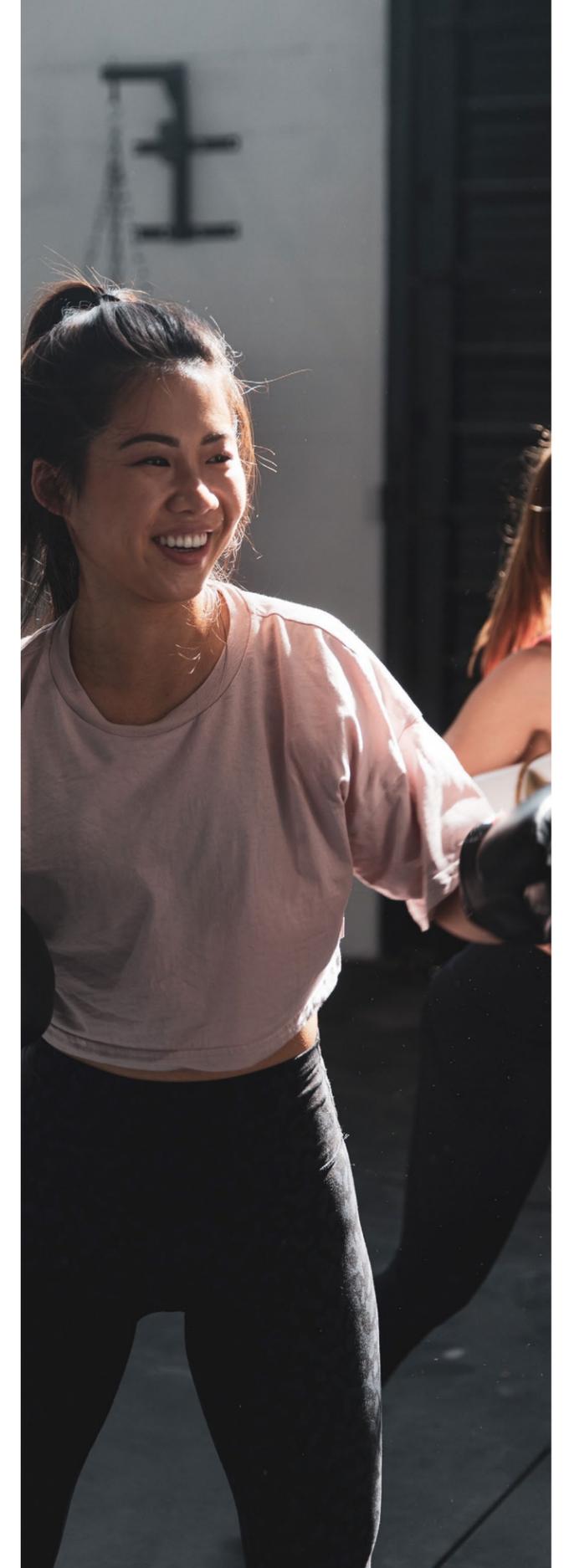
Searches
"Hormone acne"

+124% YOY²¹



Instagram
#HormoneBalance

327,647 posts²²



Next generation at home beauty



Beauty tech has boomed in the last year as salons have been closed, creating demand for quality at-home solutions.

Brands such as Philips, CurrentBody, and MZ Skin have taken services that used to only be available from professional beauty therapists - such as LED facial masks, IPL hair removal, and micro-needling - making these solutions accessible to consumers to use at home. The adjacent at-home fitness category has also seen explosive growth - helping recovery devices such as the Theragun gain appeal. Brands are offering smart customer experiences blending hardware and software technologies to guide consumers through using these products which were once known for expert use only.

Price points that had previously seemed high (many of these tools are in the £200-400 range) and some luxury brands such as Déesse and Angela Caglia going over the £1,000 barrier are beginning to appear more accessible. As consumer finances have, in some instances, been buoyed by lockdown savings and facilitated by split payment services such as Klarna and 'try and buy' offerings; consumers have better access to invest in at home experiences. A hybrid service model is starting to emerge, with consumers going to salons for high-powered initial treatments (e.g. microcurrent skin treatments), which they can then continue at home using devices, offering effective long-term solutions and greater personal control over their beauty regimes.



Conversations in culture

Fifty plus YouTube influencer HotAndFlashy (906K subscribers) receives million-plus views on her videos about microcurrent devices and LED face masks.

Brands taking action

Philips Lumea IPL hair removal

NuFace microcurrent facial toning devices

Theragun deep muscle massage gun

Where next?

Data trackers for beauty routines, such as Neutrogena's NAIA Skin360 app, analysing users' skin with a smartphone camera, then offering a personalised routine and tracking the skin's progress. Home exercise equipment with real-time feedback and expert advice. For example, the Bowflex Max Trainer M8 uses Artificial Intelligence to design custom workouts that adjust to the user's performance and how they're feeling, providing a coaching service through the app to offer guidance and motivation

At-home, expert connected health gadgets, such as the Tytohome remote exam kit that allows users to conduct a basic medical exam at home and then pairs with a teleconferencing app that connects the user with a certified healthcare provider for a remote consultation, as well as diagnosis, treatment plan, and a prescription if needed.



Let's look at the data



Instagram
#MicroCurrent

98,833 posts²⁵



Searches
"Nuface microcurrent"

+133% YoY²⁶



Searches
"Best home laser hair removal"

+116% YoY²⁷



Searches Micro needling tool
"beautybio glopro"

+180% YoY²⁸

Routine as ritual



During lockdown, routines took on a symbolic significance.

Simple tasks such as cleansing felt meditative – we relished the act of removing ‘the day’ – and masking not only replenished our hair and skin but also our energy levels. Even the simple, everyday acts gave a much-needed moment of self-care. “Showing up to the mat” for a yoga or Pilates class was, for many people, a way of showing up for themselves: a way to make themselves the priority for an hour, amid the demands of family and work. Making space for spiritual activity was another, as people turned to meditation, lighting incense and candles, and the routine of the daily horoscope as a means of checking in with themselves and staying in balance through difficult times. Long bubble baths and adding steps to skincare routines offered a sense of sanctuary as well as efficacy.

For the most self-improvement minded, daily routines such as brushing your teeth were an opportunity for ‘habit stacking’, a technique for setting new, positive habits (such as a few reps of squats, mindfulness or practising a language) by linking them to already-established behaviour patterns. Even on the hardest days, completing your self-care routine properly at the end of the evening (make-up fully removed, teeth flossed) provided a way to get back on track and end the day in a more positive frame of mind.

As part of this, people’s interest in and perceived need for sensory textures, soothing ingredients and calming scents skyrocketed as they looked for aromatherapeutic, nostalgic, spirit-enhancing products to elevate mood, mind and health to make them feel and look good. This more holistic approach to health and beauty routines caused a shift in perspective from viewing necessary habits as chores, to ritualising them as wellbeing boosts. Habits have become moments to regain a much-needed sense of calm, control, and centredness, offering comfort and serenity in the midst of uncertainty.



Conversations in culture

Luxurious bath time setups as prime Instagrammable content, with hashtags such as #bathgoals (130,949 Instagram posts) and #ritualbath (45,186).³¹

Influencer Jasmine Hemsley (120k followers) ran daily lunchtime sound baths on her IG channel to set the tone and intentions for the rest of the day.

Brands taking action

Rituals - Motivated by the brand philosophy of “We’re not here to sell you beauty, we are here to make you feel good”, Rituals believe in products that help transform everyday beauty routines into self-care rituals.

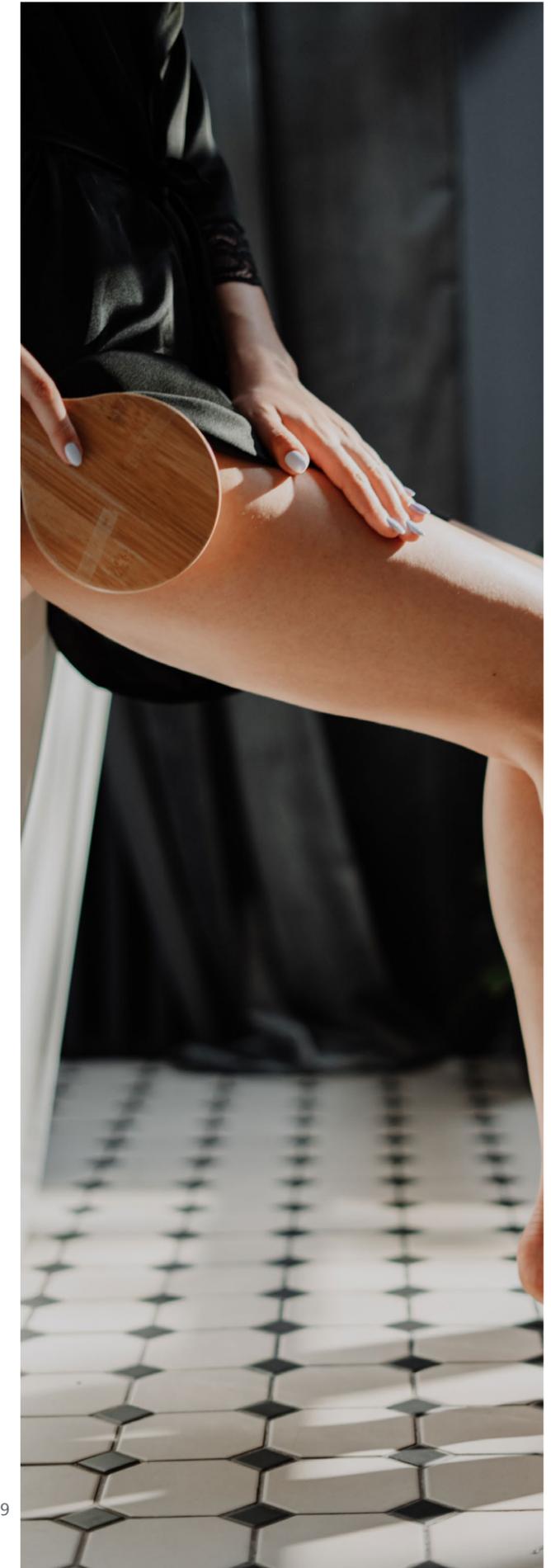
Neom - Known for its product collections, including “The Sleepy Routine” and “The Calming Routine”, Neom believes in “making wellbeing easy” by providing consumers with everything they need to adopt routines for body and mind.



Where next?

Physical wellness practices are becoming a mode of psychological therapy, e.g. using bodywork (e.g. massage and touch therapy) as a means of unblocking trauma and building a better relationship with yourself.

More openness to the idea of beauty rituals as spiritual practice (e.g. spiritual cleansing bath), with a focus on ritualised self-care as a means to self-soothe, focus, and direct energy to open paths and realise goals.



Let's look at the data



Google searches
"gua sha stones"

+1,110% YoY³²



Pinterest searches
"spiritual cleansing bath"

+180% YoY³³



Google searches
"bath ritual"

+125% YoY³⁴



TikTok
#Zodiac

30.1 billion views³⁵



Ultra personalisation

It's the end of one-size-fits-all-beauty. With an influx of information online and on social media, particularly the rise of expert 'skinfluencers', consumers have educated themselves on their personal beauty needs.

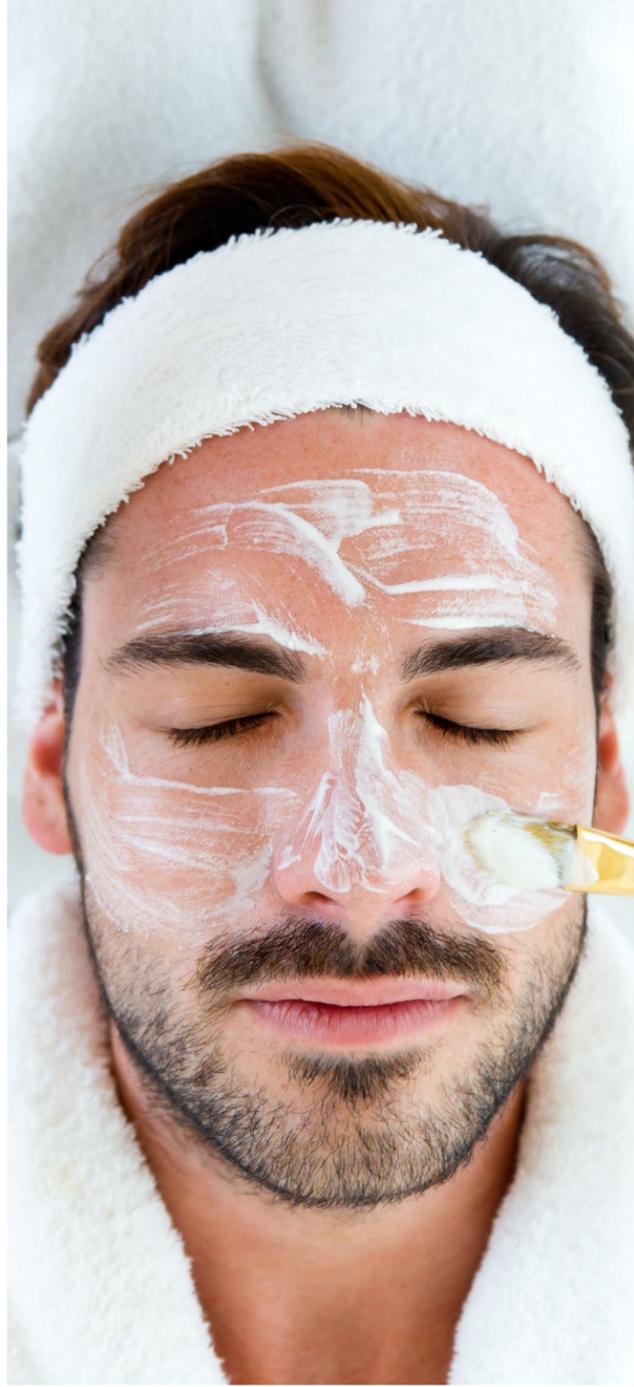
They know their skin, hair and body best; they also realise that everyone is different and want their individual requirements to be catered for. Thanks to digital technology and scientific advances, bespoke beauty products and services are moving from a luxury offering available exclusively to the well-heeled into the mainstream. From smart face masks and 3D-printable makeup to skincare based on microbiome testing, brands are creating ultra-personalised beauty products and technologies to respond to growing consumer demand for experiences that really work uniquely for them. Electric toothbrushes like the Sonicare Prestige 9900 incorporate SenseIQ technology into the design which can sense your brush style and adapt to you as you clean.

Brands taking action

Shiseido - Shiseido's Optune IoT-powered skincare system integrates a mobile app leveraging AI to detect users' skin conditions and dispense a personalised formula each day.

Manual - A well-being platform for men, offering clinically proven, personalised treatments, based on blood test and remote consultation, for conditions ranging from sexual health and skincare, to hair loss and heart problems.





“I really like how personalized the products are, you can change things up the next month to find the absolute perfect products for your specific hair needs and goals.”⁴⁴

Trustpilot review of Function Of Beauty

Where next?

With drones and super-local delivery bringing delivery times down to mere hours/ minutes, consumers’ real-time beauty needs will be able to be met, for example urgent sunblock on a hot day or fast-acting spot treatment.

Bringing together environmental sensing which can detect weather, temperature, pollen, UV index and humidity and artificial intelligence for ultra-personalised cosmetics and skincare formulas, e.g. L’Oréal Perso.

Apps capable of generating customised 3D-printed face masks based on the assessment of skincare needs and facial measurements from a selfie, e.g. Neutrogena MaskiD now in beta.

Let’s look at the data



Google searches
“beauty subscription box”

+83% YoY³⁹



Google searches
“microbiome”

+50% YoY⁴⁰



Google searches
“personalised skin care”

+85% YoY⁴¹



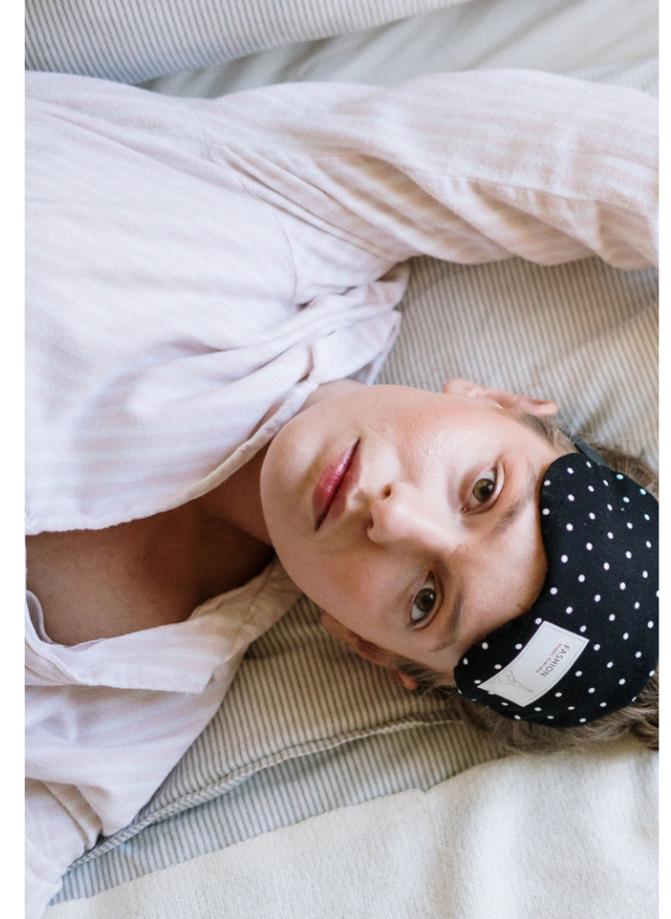
Sleep well



Sleep care is seeing a renewed impetus after COVID-19 played havoc with many people's regular sleeping schedules.

From home goods just for sleep to night-time yoga and unwinding exercises, people are bringing intention to more restful regimens, based on the notion that a good night's sleep is the foundation of wellness. Furthermore, with sleep-tracking tech becoming ever more popular, people are increasingly aware of their sleep quality and focusing not only on getting enough sleep, but on getting enough good sleep. Self-tracking apps monitor movement during the night to track the depth of your sleep and provide an estimation of quality. At the end of the night, wake-up lights and audio solutions ease people gently into the day in accordance with natural biorhythms, aiding mood and productivity.

People are looking beyond traditional pharma sleeping aids to a much wider range of solutions for quality sleep, including supplements, calming scents, pillow mists, wearable devices, luxurious bedding, organic mattresses, blue light glasses, white noise machines, and meditation and breathing apps. A holistic awareness of the role of food and nutrition in enabling rest is fuelled by an array of sleep teas, milks, supplements and foods fortified with sleep-encouraging ingredients such as chamomile, lavender, reishi, CBD and passionflower.



Conversations in culture

Headspace X Netflix – on-demand calm – with people spending more time at home and insomnia on the rise – Headspace & Netflix have teamed up to bring mindfulness, meditation and a guide to sleep to new audiences. The tie-up makes new wellness habits easy to explore by living on the popular streaming service.

Brands taking action

This Works - Deep Sleep Pillow Spray

Dr. Barbara Sturm – Sleep Food



Where next?

More refined sleep tracking technology capable of monitoring sleep disturbances like coughing and snoring, and environmental factors such as light and temperature changes.

Apps will start making causal inferences, identifying how factors such as daily screen time or exercise intensity affect sleep patterns - and will make targeted recommendations on how to boost sleep quality.

As workers return to the office, increased interest in dedicated spaces for meditation and mindfulness - and flexible, chronotype-based working schedules to allow people to match their hours to their natural sleep patterns.



Let's look at the data



Pinterest searches
"sleep blends for diffuser"

+80% YOY⁴⁵



Pinterest searches
"sleep yoga"

+90% YOY⁴⁶



Google searches
"sleep sprays"

+83% YOY⁴⁷

Conclusion

At the writing of this report, the UK will soon experience either a full lifting of COVID-19 restrictions or remain a bit longer with lighter social distancing measures in place. In both scenarios, the impact of COVID-19 will continue to stay with us for some time and its legacy will affect individuals and sectors in different ways.

For the beauty and well-being industries, we expect to see a significant focus on a new appreciation for beauty stemming from total holistic health – triggering new behaviours and interests that enable people to shape their beauty routines, based on what’s best for their overall health as opposed to something that cosmetically looks nice in a photo. The last 18 months have given people, a much greater focus on the importance of not only physical health but mental too. We believe people will continue to seek out new ways to take control of their complete health and beauty and wellness routines, in a way that benefits their individual needs.

It will be important for the sector to reflect on the themes highlighted in this report and for brands to adjust, adapt and respond to health drivers in order to better serve people’s – and societies – changing needs. With so many behaviour changes in a relatively short space of time we believe that a renewed focus on overall holistic health will remain at the forefront of people’s minds, long after the pandemic has passed us by.



Source

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