

The Body Profit

The natural and elusive nature of beauty is being democratised by technology, medicine and consumerism, writes Sarah Rabia. The future body will be our personal work of art and we will explore every facet of it.

Illustrations by James Dawe





Beauty is increasingly aligning itself with the science, health, food and wellbeing industries

As the beauty industry evolves, tweens and men are among the new target markets – the tween segment represents \$500m in the US alone

The future of the beauty industry is being driven, to an extent, by ageing baby boomers. Almost one in 10 people is over 60 years old; by 2050, the figure will be higher than one in five

The hands and the scalp are the new frontiers in beauty, taking over from nail care and haircare

New cosmetic procedures target the skull, the cheeks and even the vagina, and liposuction for the shoulders, ankles and knees is becoming more popular.

The medical industry is influencing the beauty industry in the same way fashion has traditionally done – no surprise in our health-focused society

Cosmeceuticals (cosmetics with drug-like effects) are big business: the market is now worth \$8.2bn and could top \$17bn by 2010

'Doctor brands' – beauty ranges created by surgeons and dermatologists – are increasingly in demand as consumers search for products with medical-grade efficacy and a doctor's seal of approval

Look out for advances in stem cell skincare, beauty products boosted with growth factors and cosmetics enhanced through nanotechnology

Surgeons will come to be our aesthetic consultants as the trend continues for minor cosmetic procedures

Over the next decade, the role of the beauty, health and image industries will be to empower consumers to make their fantasy self a reality. The relationship between fashion and beauty will fragment as beauty aligns and exalts itself with the science, health, food and wellbeing industries. Our search for meaning and happiness in the world is raising beauty to a higher, existential level. As beauty and marketing psychologist Torbjörn Eliazon says, 'Beauty is something that raises a kind of joy and satisfaction that our existence in the world really needs.'

Welcome to a new era of skull-lifts, men's make-up, aesthetic consultants, hand-held wrinkle lasers and vaginal rejuvenation.

BODY PUBLIC

Driving the beauty industry forward is the rise of Womenomics, the increasing economic power of women, which is leading to the feminisation of culture and consumerism. Another important factor is digital culture. 'We are being given a lens to constantly look at ourselves and others and compare,' says Dr Helga Dittmar, an academic who studies the impact of consumerism on identity and wellbeing. This is driving us all to be hyper-aware of our appearance and identity.

LOLITA MARKETING

As the beauty industry evolves, new consumers are emerging. The tween segment represents \$500m in the US alone, according to market analyst NPD, which has also found that tweens consume at least 30 different beauty products – from lip gloss to cellulite cream. In response, Procter & Gamble is rethinking the target market for CoverGirl, creating make-up games to attract consumers as young as eight.

ONE FOR THE BOYS

Male make-up is no longer a joke but a serious, growing business, part of the \$23bn male beauty market, according to Euromonitor. Brands as diverse as Yves Saint Laurent and H&M are now launching products such as mascara and concealer that go far beyond the traditional remit of male grooming and toiletries. Danny Ventura, a Paris-based male make-up expert, calls male mascara a 'nonconformist seduction tool', dubbing it 'tuxedo for the eyes'.

'Guys look in the mirror and see a face that is average. Undetectable make-up is the answer,' says Ben Coler, founder of US skincare and cosmetics line Studio5ive Skin System, which is sold online. The discreet nature of digital makes it an ideal retail channel for male beauty.

BEAUTY LIFECYCLE

It is the baby boomers, however, who point to the beauty industry's future. Almost one in 10 people is over 60 years old, according to HelpAge International. By 2050, the figure will be higher than one in five.

While beauty and old age are often seen as being incongruous, brands are rethinking the concept of beauty – and reconsidering the body parts they should target. Dove's pro-age and The Body Shop's Wise Woman ranges, with their respective ruby and gold packaging, have reconceptualised anti-ageing products into prized symbols of wisdom. 'Beauty is not the same for an 18-year-old as it is for a 45-year-old,' Eliazon says. 'The concept of beauty needs to be updated throughout our lifecycle.'





HANDING UP

The beauty industry and its youthful target market have generally been disinterested in the hands, which display more subtle and advanced signs of ageing, instead focusing their attention on nail fashions. The mature consumer, however, desires youthful-looking hands rather than trendy nails, which is leading to the decline of the nail category. We predict nail care will evolve into a new hand care category, which will be driven by demand for caring, hygienic products and the increasing interpersonal nature of beauty. Space NK has recently launched its organic Hands range to tap into this growing market.

'The hands and arms are becoming real concerns for consumers,' says Terry de Gunzburg, the former Yves Saint Laurent make-up visionary who invented Touche Éclat and has since created her own brand, By Terry. 'We're working on a new product that corrects the skin in these areas. Although mature women are driving this, younger women see it as glamorous. Make-up on the body has become more natural - a continuity of the face.'

SCALP TRAINERS

A similar shift is happening between the hair and scalp markets. Procter & Gamble's recent acquisition of Nioxin, a scalp care specialist, is a sign that the beauty industry is looking to the scalp as a way of driving growth in the stagnating hair market.

Leading British trichologist Philip Kingsley has his own haircare line for UK health and beauty retailer Boots, positioning him as a celebrity hairdresser rather than a healthcare specialist. 'Trichology is becoming far more widely known,' Kingsley says. 'Many of my clients use me as their 'hair personal trainer' and

visit me every two weeks for a reassessment and to make sure all is going well in their hair world. I feel that eventually people will use a trichologist in a similar way to a dentist - they will go for occasional check-ups, even before they may be aware of a problem, as a preventative measure.'

SKULL-LIFTS

Skull-lifts are predicted to replace facelifts as consumers demand a more holistic and strategic approach to holding back the clock. Research conducted by Duke University in the US has found that the bones of our face move as we grow older, exacerbating the ageing process. While facelifts work on the skin, future procedures will be carried out on the bone structure itself, and on the skull, says Dr Michael Richard, who conducted the study. Richard says that injections will eventually be available that arrest the process of bone 'drop'.

Leading US-based surgeon Dr Frederic Brandt is pioneering another approach to facelifts. His Y Lift involves injecting filler to plump the cheeks. Ten years ago, women wanted their faces to be stretched and tightened, but today looking youthful means having a face that appears not to have shed its baby fat.

VAGINA MONOLOGUES

Where women are looking for tightening, however, is their vagina. The phenomenon of 'cougars' - older women who date younger men - and increasingly active sex lives of the over-60s is driving consumers to ensure their sex organs are aesthetically pleasing and in peak health and fitness. Vaginal rejuvenation is the third-fastest growing procedure in the US, according to the American Society for Aesthetic Plastic Surgery, ▶ 139

Beauty by numbers

The global cosmetics and toiletries industry is currently worth \$290bn, according to Euromonitor's 2008 'Cosmetics and Toiletries World' report

Sales of haircare products (the largest beauty market at \$57bn) and fragrances (the third at \$33bn) are stagnating because of Western market saturation, and sales of nail care products are in steady decline

The male beauty market is worth \$23bn, the tween market \$500m

Nutraceuticals (foods that promote health and beauty) are an \$80bn business, according to strategic research organisation Compera

Cosmeceuticals (cosmetics with drug-like effects) are worth \$8.2bn, according to Datamonitor. Industry consultant Wendy Lewis predicts sales of cosmeceuticals to top \$17bn by 2010

The BRIC market (Brazil, Russia, India and China) is the beauty industry's growth engine. China is the largest contributor - its market is set to grow \$7.1bn by 2011

Developed countries, particularly the UK, are still an important part of the industry's future. Britons are the biggest beauty consumers in Europe, spending 43% more than the average European, according to 'European Health & Beauty Retailers', a 2008 report by Verdict Research

By 2012, global sales in the cosmetics and toiletries industry are predicted to reach \$337bn, Euromonitor reports



and up 300% in the UK in the private sector (149% in the NHS), reports the British Association of Aesthetic Plastic Surgeons.

NEW LIPO LANDSCAPES

In the search for perfection, women are finding hitherto ignored areas to work on, and shoulders, knees and ankles are undergoing liposuction. Surgeons in New York have reported a rise in the number of women undergoing shoulder liposuction, inspired by sinewy celebrities such as Keira Knightley. Procedures for the shoulders, ankles and knees are becoming more popular because they are parts of the body that the gym cannot reach. Méthode Jeanne Piaubert's Superknee slimming gel is one of the very few products on the market for the knee.

MEDICAL BEAUTY

The medical industry is starting to influence the beauty industry in the same way fashion has traditionally done. 'Fashion is no longer so important to beauty. Today fashion is just empty consumerism whereas beauty has become a science,' says de Gunzburg.

The blur between medicine and beauty is becoming the most critical in our health-focused society. Current Food and Drug Administration policy in the US distinguishes between drugs and cosmetics based on their intended use. As the distinction becomes more ambiguous, expect the formulation of cosmetics to be treated as strictly as pharmaceuticals.

Cosmeceuticals (cosmetics with drug-like effects) are big business: the market is now worth \$8.2bn, according to Datamonitor, while industry consultant Wendy Lewis predicts the market could top \$17bn by

2010. The medical industry is starting to reposition itself as a consumer market.

As we become increasingly concerned with our health and resisting the ageing process, consumers will be looking for products with medical-grade efficacy and a doctor's seal of approval. Twenty-eight per cent of consumers already prefer brands that have a doctor's endorsement, according to market research company NPD. Celebrity endorsements will lose their effectiveness as the mature consumer looks to true experts and specialists for guidance.

This is being spurred by the rise of 'doctor brands' - beauty ranges created by surgeons and dermatologists. Plastic surgeon Dr Barry J. Cohen is behind pH Advantage, marketed as the best skincare available without a prescription. The products are designed to work in conjunction with surgery, one of the key trends for cosmeceuticals as the beauty industry seeks to coexist with its medical counterpart.

STEM CELL SKINCARE

The European Society for Dermatological Research has been collaborating with luxury powerhouse LVMH. The result is Dior's Capture R60/80, a skincare range that promises to protect and renew existing stem cells. Stem cells regenerate the skin and keep it looking youthful but diminish as we age. Stem cell technology, traditionally used for burn patients, is seen as the holy grail of anti-ageing.

In Russia, women are starting to have their stem cells - what they see as an elixir of youth - harvested, banked and re-injected. The Beauty Plaza Health & Spa in Moscow offers one such service, although this procedure is currently illegal and untested in most of the world. ► 140

Top 5 new beauty products

1. YSL Touche Éclat for men

The male version of arguably the world's most iconic and universal beauty product, YSL's new mascara is a signal that male make-up is becoming a reality.

2. Rejuve MD Eye

Created by LA dermatologist Alex Khadavi, Rejuve MD is a new skincare brand containing the highest available concentration of three different bio-identical growth factors to help return the skin to a more youthful state.

3. Dior Capture R60/80 XP

The result of a research collaboration between the European Society for Dermatological Research and LVMH laboratories into the possibilities of stem-cell technology. Promising to renew and protect the stem cells and prolong youthfulness of the skin, this is one of the most futuristic beauty creams on the market.

4. AmorePacific IOPE Renewing Skin Filler

An at-home medical beauty solution formulated to target collagen in the innermost layer of the skin. Designed by innovation consultancy IDEO, the packaging comprises two layers: the top holds a case inset with four ampoules and a jar, and the bottom contains four packs of cotton cloths.

5. Swissdent nano-whitening toothpaste

Nano-whitening toothpaste takes home bleaching to a new level, as nanotechnological ingredients become more widespread. Even natural products, such as Burt's Bees sunscreen, contain nano particles.

Body atlas: The most profitable body parts

1. **Skull** A more holistic and strategic approach to holding back the clock, skull-lifts are the next generation of facelifts.
2. **Scalp** As the haircare market stagnates, the industry is looking to the scalp to drive growth, with 'scalp trainers' set to join the beauty entourage.
3. **Shoulders** As consumers demand body perfection and transformation in areas the gym cannot reach, the body's formerly neglected nooks and crannies will become new profit points. The shoulders are an emerging focus.
4. **Hands** The declining nail category will evolve into a new hand care category targeted at the mature consumer and the increasingly interpersonal nature of beauty.
5. **Vagina** The mature, sexually empowered consumer is demanding that her vagina be as aesthetically pleasing and in as good health as the rest of her body.

GROWTH FACTORS

The beauty industry is also banking on growth factors to drive the anti-ageing business. Growth factors are a type of protein the body needs to stimulate the production and maintenance of cells. They reduce with age, diminishing our ability to repair and regenerate the skin. Recent studies show that certain growth factors can be added topically to the skin. 'This is where most of the research is going on right now in skincare companies,' independent dermatologist Leslie Baumann has said. 'In the future, I think we'll be seeing a lot more products containing growth factors,' she says – products such as RéVive's Intensité Volumizing Serum, which contains bioengineered keratinocyte growth factor to help replenish dying skin cells faster than normal.

NANOBEAUTY

Nanotechnology, a field of applied science that controls matter on a molecular scale, offers a Judy Jetson-style vision of the future in which beauty products apply themselves – a hairspray that moulds the hair into a specific style, for instance. The number of cosmetics using nanotechnology has risen to 89, according to the Project on Emerging Nanotechnologies. One example is Swissdent's new nano-whitening toothpaste, which takes home bleaching to a new level. Even natural products, such as Burt's Bees sunscreen, contain nano particles.

BODY, BOUGHT

Just as the beauty industry is adapting to surgery, surgery is becoming ever more cosmetic, says Dr Sampaio Goes,

one of Brazil's top cosmetic surgeons and former president of the International Society of Aesthetic Plastic Surgery. 'The fastest-growing sector in surgery is the trend for minor procedures, such as Botox and fillers, with fast results where you don't have to stay in hospital,' Dr Goes says. 'This is about getting more natural results. Patients don't want to look like they've had work done.'

AESTHETIC CONSULTANTS

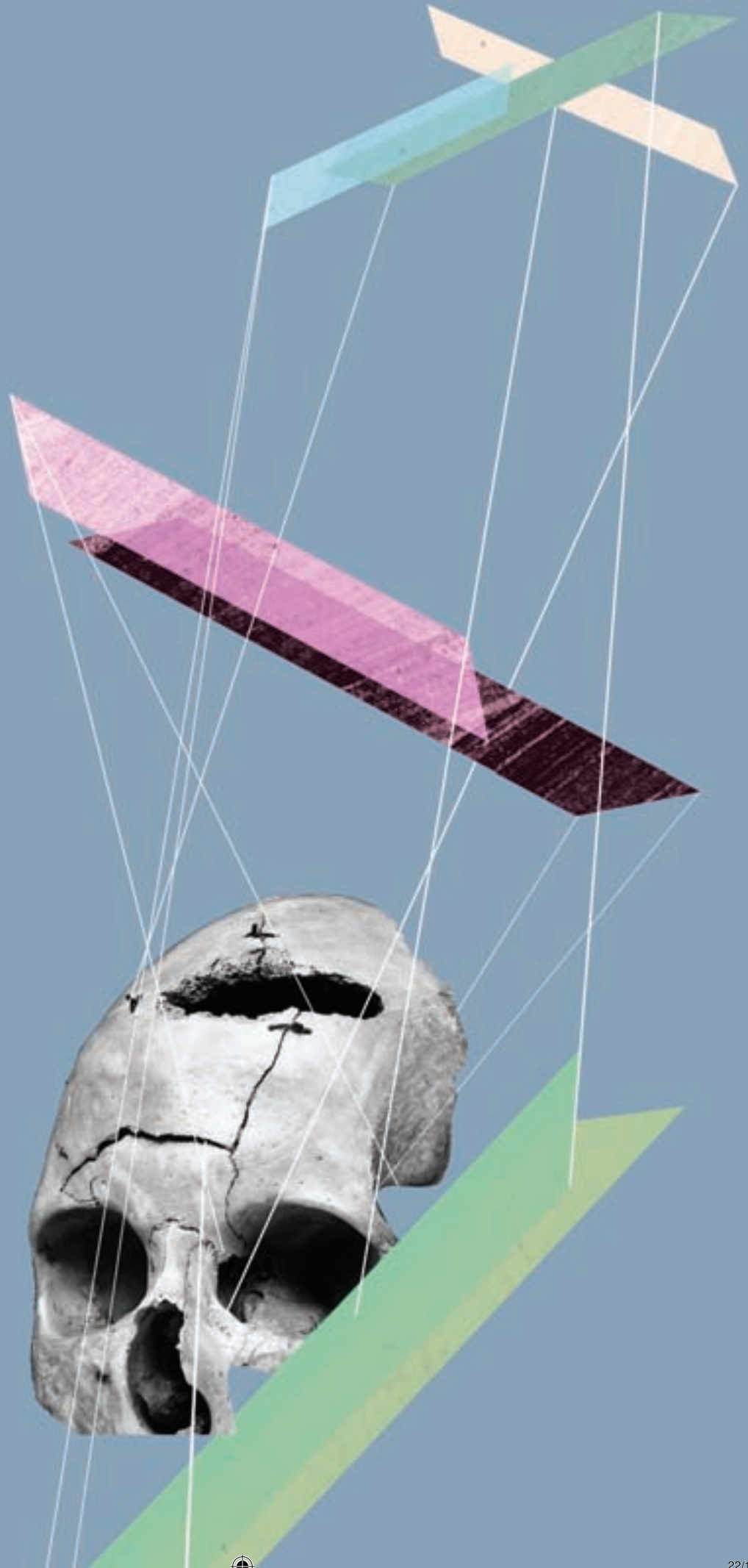
Renowned Beverly Hills aesthetic surgeon Dr Francis R. Palmer believes today's surgeons are tomorrow's aesthetes. 'Plastic surgeons have to understand the concept of beauty better than anyone because they are creating it. Surgeons should be trained in what beauty is, as should consumers.'

In the future, Dr Palmer believes, we will regard surgeons as our aesthetic consultants. Driving this new relationship between surgeons and patients is the increasing economic importance of how we look. 'How we look and appear in front of others will be, if not already, the most important factor in our relations and career opportunities,' Eliazon says.

THE ULTIMATE SELF

Until we believe our untouched physical form is the best possible representation of ourselves, we will embrace a holistic cocktail of technology, medicine, spirituality and imagination to create a version that is not only better but lasting as well. It will be irresistible and, to many, quite simply a common-sensical thing to do. 'We can make you more attractive than you'd ever imagine. We can promise that,' Dr Palmer says. 'The consumer is ready to make that leap.'





VIEWPOINTVIEW

All praise to Dove and its 'real beauty' campaign (riding a wave of success, the company is set to open another 50 new spa centres in Canada) and all luck to those style pundits who say ugly is the new beautiful, but the fact is that beautiful people find it easier to get more friends on Facebook, secure the right marriage partner and climb the career ladder.

The beauty enhancement business is set to grow exponentially as beauty moves out of the fickle realms of nature and the God-given into the highly controllable and marketable world of science – and embracing the medical, health, food and wellbeing industries along with it.

This phenomenal growth will of course be driven by the power of Womenomics, but it will cover all generations. Tweens (currently estimated to be a \$500m

market) and the Zeno generation, looking to offset the effects of its indulgent lifestyle, will be key consumers, as will members of Generation Jones and Primetime Women in their 50s and 60s who are set to stay on top of the pyramid for as long as possible. (By 2050, one in five people will be over 60.) Note, too, that beauty is a global business: savvy brands will remember this as the buying power of the new middle classes in India, China and Brazil kicks in. And don't forget the men: the male beauty market is currently worth a healthy \$23bn.

We are now looking at a whole new world of skull-lifts, hand-held wrinkle lasers, vaginal rejuvenation, shoulder liposuction, stem-cell skincare and growth factors. And we are looking at a whole new list of job descriptions as

well – here are aesthetic consultants, hair personal trainers and medical endorsers. As more consumers seek a doctor's endorsement, more products are produced to work in conjunction with surgery; the medical industry is starting to influence the beauty industry in the same way fashion has traditionally done.

Of course, as the world of beauty becomes increasingly commoditised, we are facing the same ethical questions that come up when we consider bio-enhancement. Could we one day live in a world where only the rich are beautiful and the poor are ugly? God forbid. However, as stated here, we are living in a world where the woman who doesn't wear make-up, go to the gym, surrender to the scalpel and obsess over her appearance is the exception, not the rule.