

What is Beauty today?

Voices and Visions from Modern America



Quirks Chicago
Special Bonus Offer



bolt

Who are we?

Global Reach with Local Insight

100+ researchers, technologists and brand strategists who see the beauty in insights

belt London :: Paris :: Italy :: Istanbul :: New York :: Singapore :: Japan :: Philippines **belt**

Speakers



Ryan Taylor

Director of Client Development, NA



Shalini Sahi

Head of Human Intelligence & Strategy



Pioneers of AI-Driven Market Research

300,000+ quantitative interviews

25,000+ qualitative interviews

10 million+ responses analyzed

80+ markets reached

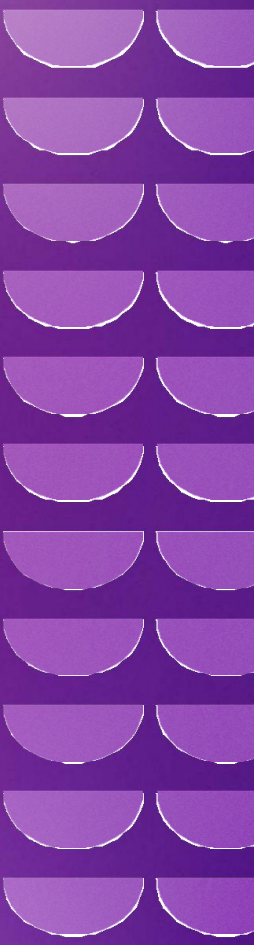
100+ active clients



Trusted by the World's **Leading** **Insight Teams**



Why we did this research



A profile view of a woman's face, looking to the right. Her hair is dark and pulled back into a bun. She has a soft smile and is wearing a small, colorful earring. The background is a light, neutral color.

**We didn't just measure
beauty we decoded its
cultural psychology.**

1,200

nationally
representative
U.S. respondents

50

deep qualitative
narratives via
BoltChatAI

**Academic
collaboration**

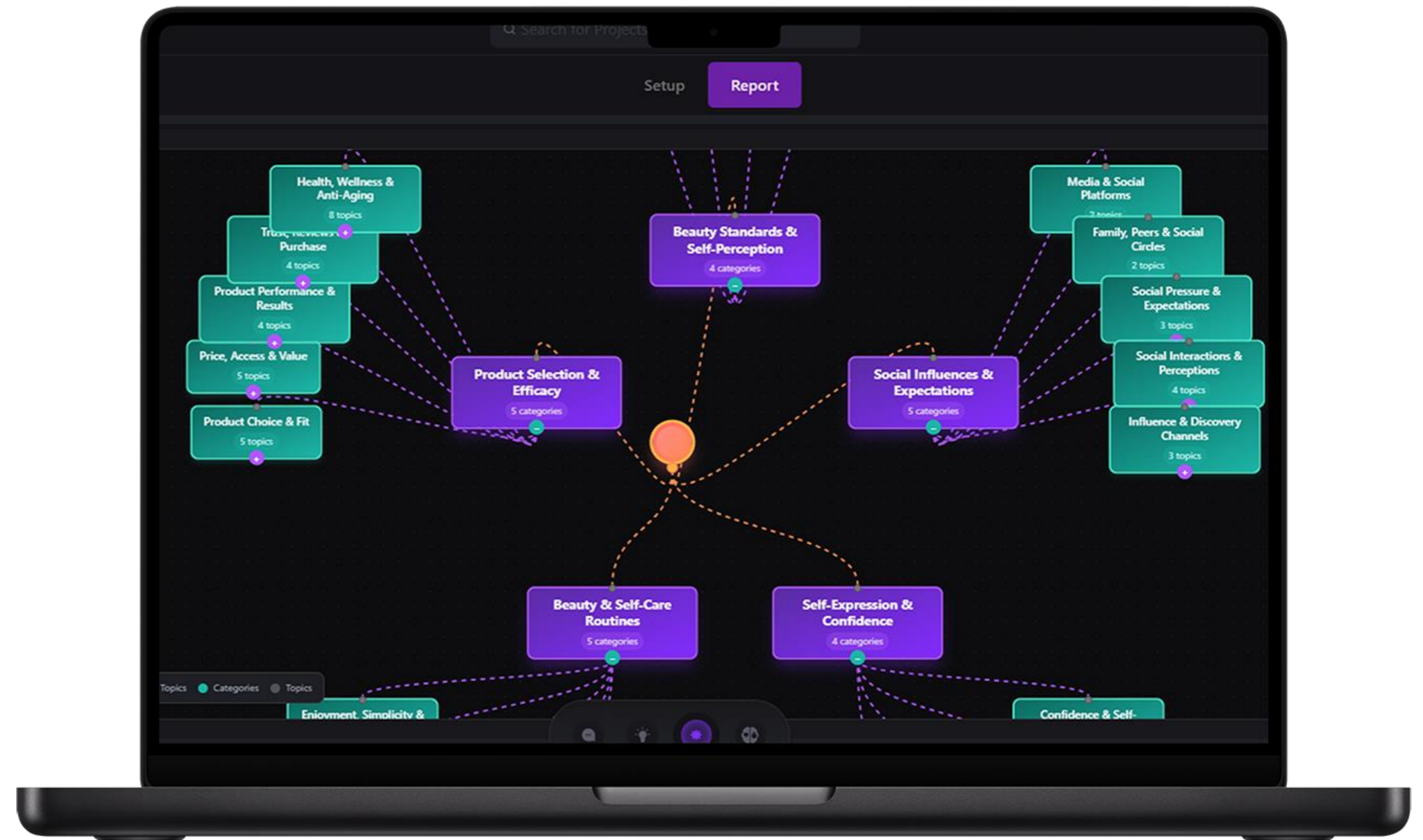
to uncover the cultural
meaning behind the data

Beauty is no longer a category **it's a cultural pressure system.**

It reflects how Americans feel about identity, belonging, and self-worth.

It embodies progress and pressure at the same time.

Brands are now expected to play a human role inside that tension.



Modern beauty unfolds in six cultural acts.

ACT I

What Beauty
Means Today

The Emotional

ACT IV

The Systems
Shaping Beauty

Culture, Media,
and Influence

ACT II

The Core
Tension

The Beauty

ACT V

Identity-Specific
Realities

Where Beauty Carries
Extra Meaning

ACT III

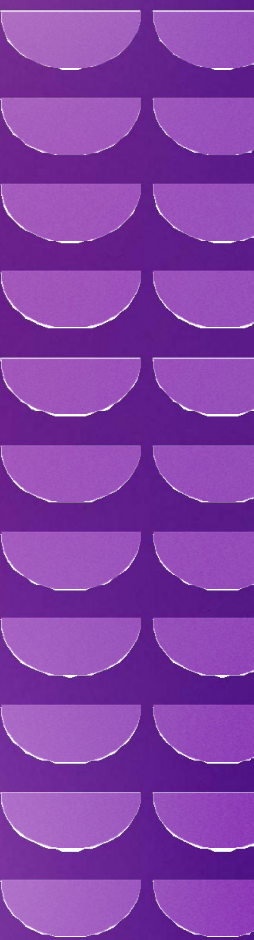
How People Cope
and Act

Behavioral Responses

ACT VI

Where Beauty Is
Going

The Future
Mandate



Act I

What Beauty Means Today

Beauty has moved from appearance to alignment; it is now about feeling right not looking flawless.

“Natural, balanced, real”

replaces “perfect”



Only
12%
Define it as
purely physical

65%
define beauty as
inner & outer

Self-expression & natural ingredients are eclipsing traditional beauty benefits

- Humans are putting money where their values and beliefs are
- Product efficiency is as important as brand association
- Natural ingredients are rooted in better for you and authenticity

So What?

Innovation unlocks to need adjacent benefits



Act II

The Core Tension



73%
feel judged

74%
feel societal
pressure

Beauty isn't being redefined it's being negotiated.

The most pressured groups are the ones driving growth: Gen Z, Millennials, LGBTQ+ individuals, Hispanic Americans, and working professionals.

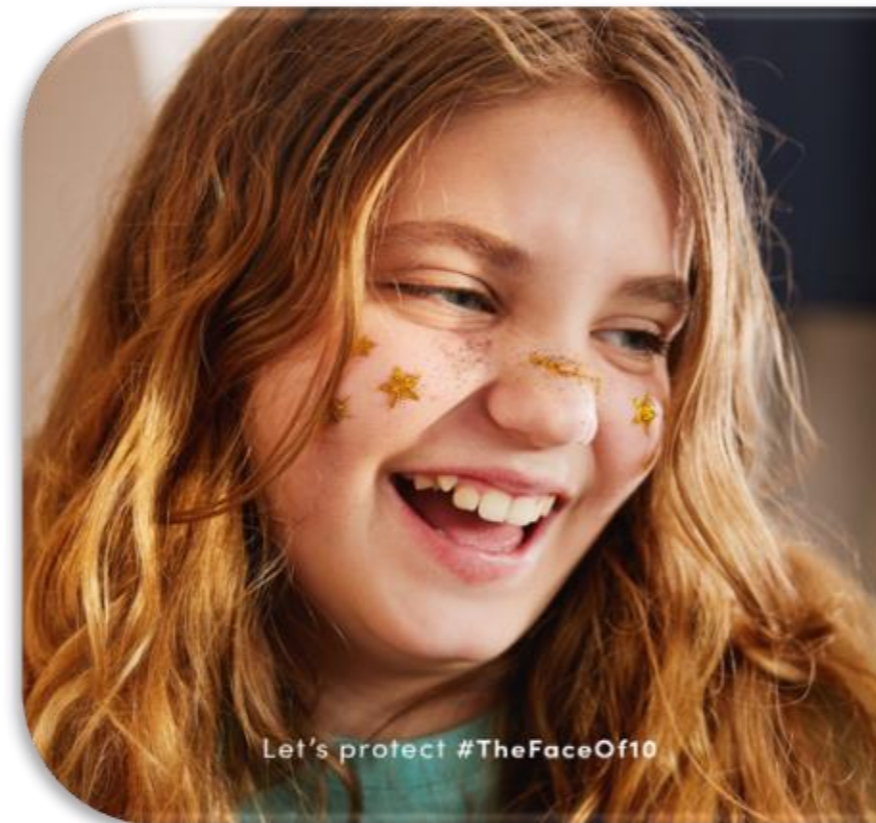
The people shaping beauty culture are also the ones most burdened by it.

Self-esteem & self-worth are new priorities

- Nostalgia is connected to Self-Esteem rooted in being lovable and capable
- Everyone is striving for personal growth beyond beauty – Wellness is Worth

So What?

Create trust with a “we get it” message embedded in your solution



Does youthful glow need more youthful glow?

Girls as young as 10 are being influenced by anti-ageing skin care content, which can harm their self-esteem.



Watch the Anti-Ageing Skin Care Talk on TikTok

Dove
Let's Change Beauty

We're helping 40 million young people build self-esteem

Act III

How People Cope & Act

Beauty isn't being redefined, it's being negotiated.

Reframe categories more insightfully:

Skin

Control &
Discipline

Hair

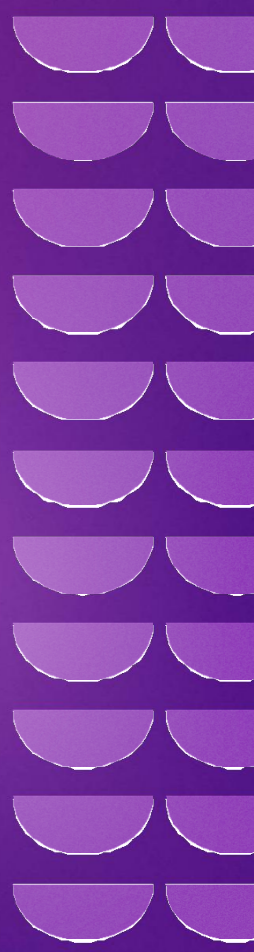
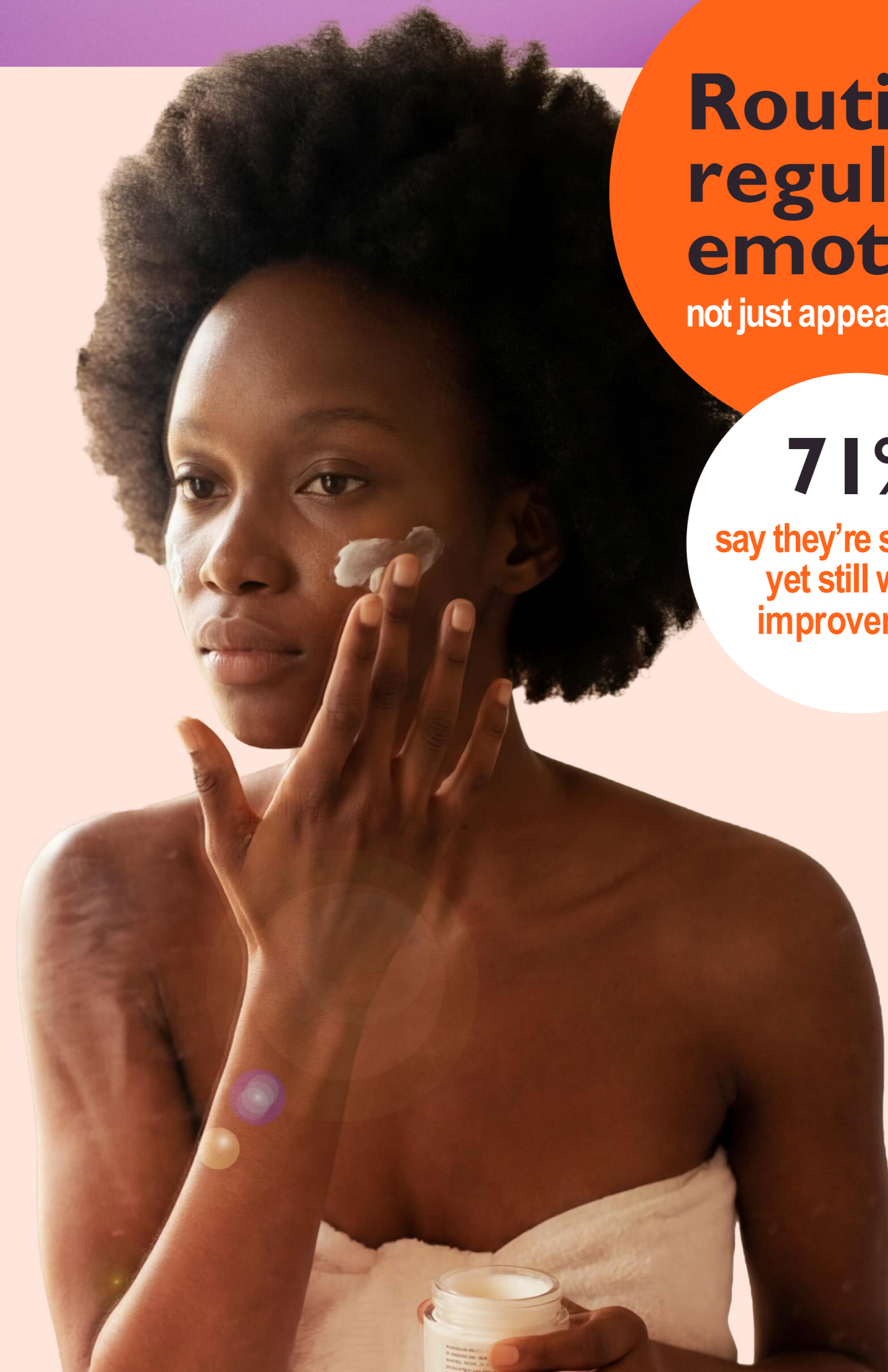
Identity &
Emotional Stability

Body

Self-Respect &
Social Respect

Routines regulate emotion,
not just appearance

71%
say they're satisfied
yet still want
improvement



Beauty routines are the new self-care rituals, regulating emotion, not just appearance.

So What?

Routines are demand spaces.

Build occasions and offerings around daily reset & calendar moments



Act IV

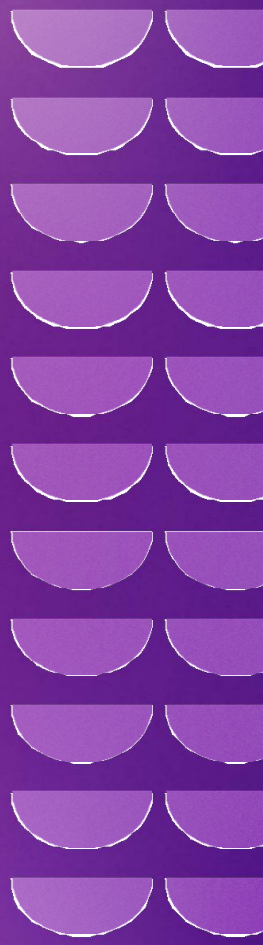
The Systems Shaping Beauty

Beauty is no longer socially learned
it's platform-engineered.

81% say social media shapes beauty norms. Nearly half say it shapes their own perception.



Influence is fragmented but pressure is unified!



Some brands choose to conform to the algorithm; others are rejecting it. Both approaches send a signal.

So What?

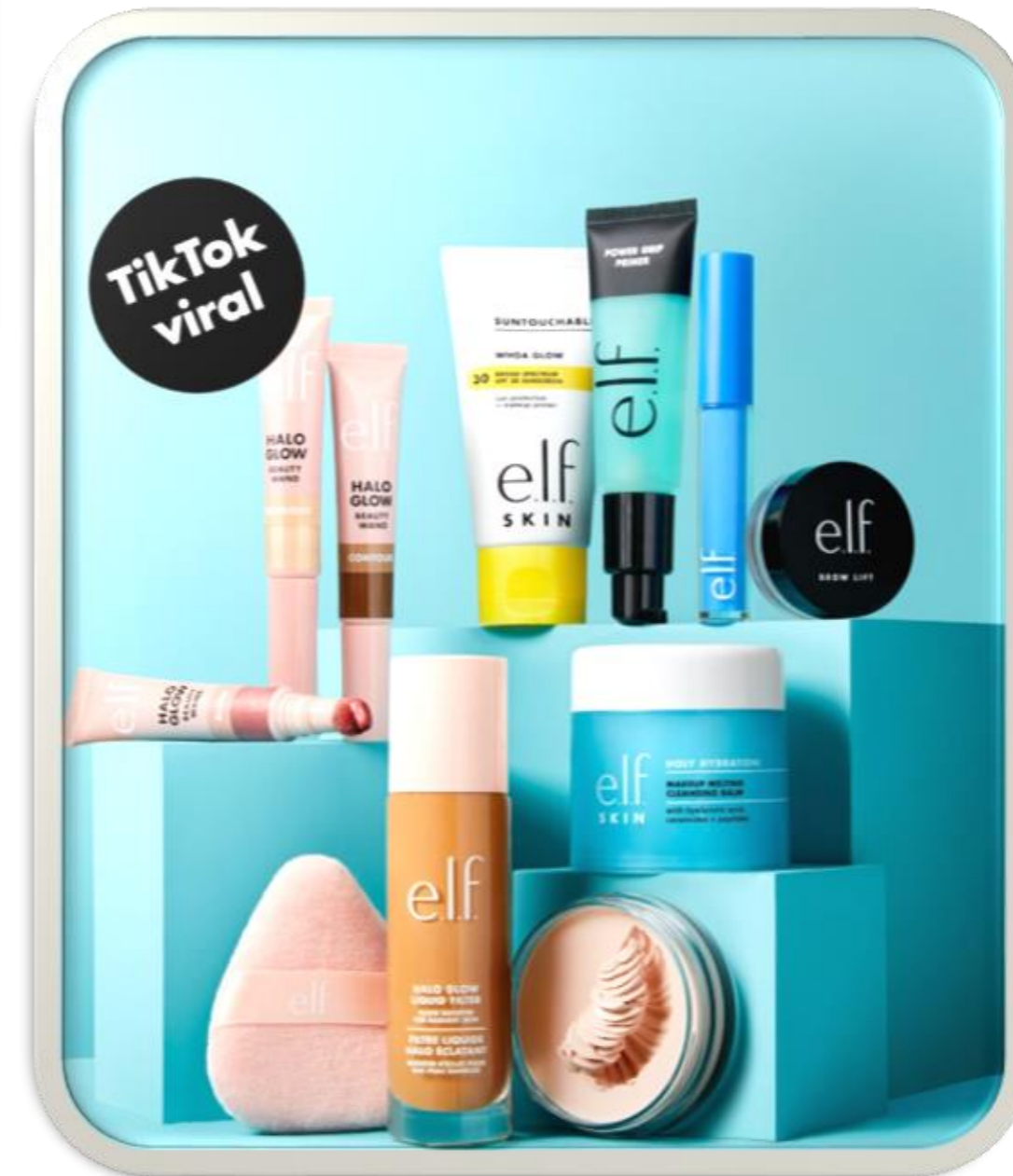
Media spend should mirror your brand identity

Showing up in the right moments
> *algorithm optimization*



“

As an inventor of bath bombs, I pour all my efforts into creating products that help people switch off, relax and pay attention to their wellbeing. Social media platforms have become the antithesis of this aim, with algorithms designed to keep people scrolling and stop them from switching off and relaxing.



Act V

Identity-Specific Realities

For some groups, beauty isn't optional it's strategic.

Beauty carries unequal emotional weight and unequal opportunity.

Man

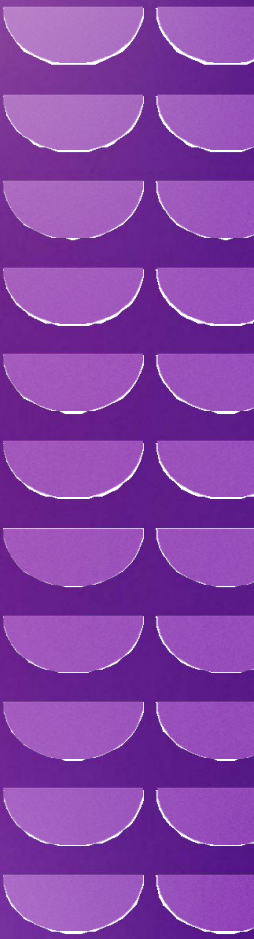
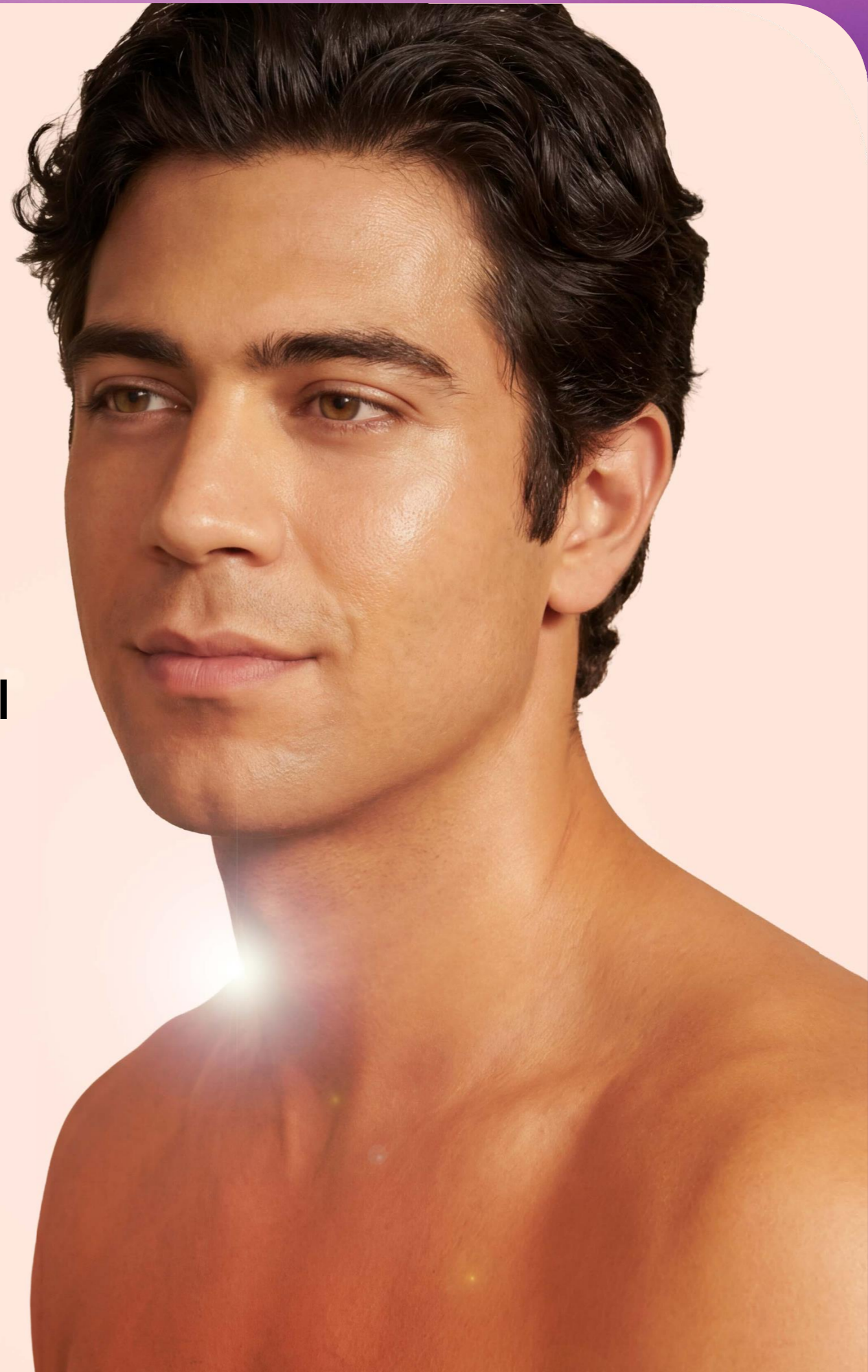
Softening masculinity is new currency

LGBTQ+

Beauty = identity signaling + psychological safety

Hispanic

Beauty = cultural pride + visible dignity



Beauty is a way to reinforce personal identity rather than changing appearances.

So What?

Culture and identity shifts in real time!! Connect with Humans at scale, in the moments that matter – not when they are *ready* to buy



Act VI

Where Beauty is Going

The future of beauty belongs to brands that replace perfection with credibility.

Consumers demand honesty, realism, personalization

Trust > hype

Relevance > universality

The next growth era is empathy-powered.

belt

The next growth era is rooted in scientific proof and cultural credibility.

So What?

Differentiate via authenticity and transparency in structural elements.

Proof is the only currency that creates action in a market full of claims

What kind of beauty do we want AI to learn?

By 2025, 90% of online content is predicted to be generated by Artificial Intelligence. Dove will keep committed to real beauty. Learn more at: [Dove.com](https://www.dove.com)

Dove
20 years **changing** beauty

*Artificial Intelligence has been used in this advertising for the sole purpose of showing beauty bias in generative AI tools.

Today, this is how AI generates the images when we add **Dove**

What does this all say?

01

Sell “Be Yourself”
beauty not one
ideal for everyone.

02

**Design for
routines,
not miracles.**

03

**Make self-discipline
the new luxury:**
daily control, with
emotional payoff.

04

Make inclusivity
systemic,
not seasonal.

05

Build proof
into everything.

06

Match platform to
role, not reach.

07

Lead with cultural
fluency and micro-
trust.

08

Reframe mens
grooming as
confident self-
management.



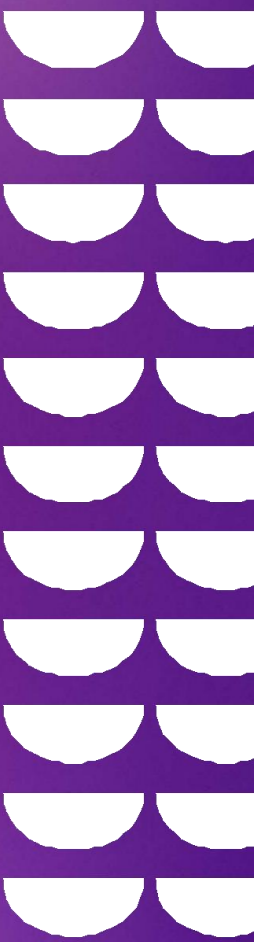
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