

Discover

your beauty

A beauty state
of mind

The pollution
solution

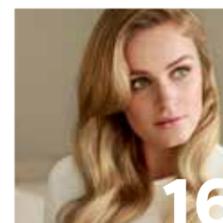
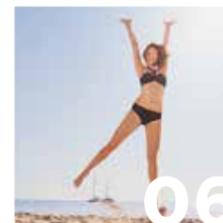
The best piece of
beauty advice I
ever received was...

Plus interviews with Chico
Shigeta, Dr Stefanie Williams,
Mihaela Noroc and Ilham Mestor



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Rianne Meijerman
Business Leader Beauty,
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LETTER FROM THE EDITOR

Hello and welcome to Discover Your Beauty!

Over the past three years Philips has conducted its Global Beauty Index, a research project aimed at identifying women's attitudes towards beauty, their feelings towards the beauty industry as a whole and hopes for the future. Building from 9,000 women in 2015 to over 11,000 today, the Beauty Index offers a view of the changing relationship women across the world have with beauty.

Our initial research, in 2015, found that women were keen to transcend their concept of beauty beyond the purely superficial, expanding the definition from simply looking beautiful, to feeling beautiful – whether that be by taking up exercise, healthy habits, or finding more diverse images of what beauty can be. At this point it was clear that although the impetus for change was present, women were also finding it hard to move past the narrow representations of beauty which they felt society was imposing on them. Women wanted to see more flexibility in the role that beauty played in their lives, allowing them to experiment with what felt beautiful to them, rather than feeling pressured to conform to an ideal.

In 2016, the research expanded to more countries and looked at how pressure from culture and society shaped the way women think about their own beauty. Social media and the rise of the 'selfie' were introduced to ascertain to what degree these new trends break down beauty barriers through increasing access to diverse images, or serve to merely reinforce existing norms. We found that women were associating their idea of beauty intrinsically with health, and happiness, suggesting that looking beautiful should start with feeling beautiful. Confidence grows on a foundation of health and beauty.

The findings from this year's research, point to the fact that most of the trends observed in 2016 are growing even stronger. Women today make their beauty decisions with a healthy mind. That is to say, they are concerned not only with surface results and efficacy, but with products which help cultivate a deeper sense of wellbeing. Encouragingly women are increasingly striving to look beautiful for themselves rather than others, with 54% of women citing 'wanting to look my best for myself' as one of the biggest drivers of pressure, and 71% citing that they feel more beautiful when they have pampered themselves.

Beauty routines are also changing. Women have added more steps and spend on average more time on their beauty routine. They actively seek advice on social media and are open to integrating new products into their routine, so long as they are effective and efficient.

By developing these conversations on beauty, we aim to better understand the needs and desires of women across the world, in order to continue delivering meaningful innovations that work. So women can discover their beauty. Every day.

We're really excited by the findings and hope you enjoy uncovering them too!

Rianne Meijerman



A beauty state of mind

In 2016, we delivered a report that revealed that a woman's beauty is tied to her perceptions of self, primarily in her confidence and her health. This year we looked to go deeper, probing the relationship between a woman's mental and physical health, and how that affects her perceptions of her own beauty.

Beauty and the beast

According to a 2015 report by Raconteur, the beauty industry in the UK alone is worth £17 billion. By most standards that's pretty big, and it's no wonder that most women (63%) feel pressure to look a certain way given the prevalence of beauty marketing.

However, women's reaction to these pressures is of indifference. For all of the perceived pressure, women remain very much in control of what they feel makes them beautiful, with 70% of women saying that they define their own beauty goals. Which raises the question – is there a disconnect between how women and the industry define beauty?

Being beautiful

Overwhelmingly, we found that the majority of women worldwide (82%) feel more beautiful when they are healthy. With more than 300 million people worldwide now living with depression (World Health Organisation), we have all come to appreciate the importance of good mental health and its role in our general wellbeing. Does this mean that the secret to genuine beauty is a strong sense of self-worth?

When it comes to the findings of the Index, India's approach to beauty is revealing. Where 96% admitted to feeling beautiful, just under half (49%) of the women surveyed said that beauty and physical appearance are the same thing. At face value this competes with our ideas of good mental health being the source of a woman's beauty. But the data also presents a number of findings that alter this. Indian women generally (83%) define their own beauty goals rather than adhere to a specific look, and many have incorporated yoga (57%) and meditation (47%) into their daily lives; these two activities that are designed to improve physical and mental wellbeing. In fact, Indian women in general, are more likely to incorporate healthy aspects into their wellbeing routine.

This is in stark contrast to markets such as the UK, where only 29% of women think themselves beautiful, and where

consistently under half of the women surveyed admit to making lifestyle changes in order to feel healthier; 63% said that they drink more water, but 12% said they've made no changes of any kind. The majority of UK women agree that a positive mind-set (84%) and physical fitness (70%) are important to their sense of personal beauty, but it seems many have not yet adapted their lifestyles to encourage this view..

INFOGRAPHIC: HEALTH AND BEAUTY

/ Women increasingly agree that being healthy is more linked to confidence than looking beautiful. Over 2016 and 2017, women rate the number one contributor to feeling confident as being healthy, with an increase from 2016 (71%) to 2017 (77%).

/ Interestingly, looking beautiful has decreased from 29% in 2016 to 26% in 2017. When women feel good on the inside, they project confidence on the outside.

/ Health (especially mental health) and beauty are strongly intertwined. Women consistently turn to other aspects to define their sense of beauty:

- 89% agree that having a positive mindset is important to how they define their sense of beauty.
- 85% say feeling emotionally balanced is important.
- 81% say being physically fit is important. A woman's sense of beauty is so much more than how she looks.

Caring for yourself

Is the answer to the beauty question then, simply, to practice yoga and meditate more often? This is probably oversimplifying a complex issue, but the positive correlation between women who look after their mental health and those that feel beautiful in themselves is clear. But how does this transfer into our day to day lives?

The daily routine is the most obvious answer. The majority of women (71%) say that they feel more beautiful when given the time to pamper themselves, while 39% admit that the daily routine gives them a sense of confidence. It may seem like a small part of the day, but taking the time to perform a daily routine, whatever that might involve, gives women a big boost of confidence. It is again telling that in the UK, where

women lack the confidence to find themselves beautiful, they are also the least likely to have a morning routine of any kind (22%).

Some might point to a beauty routine as being another example of pressure being placed on women to look a certain way. After all, how dare she leave the house without wearing makeup?! But in the same way that women will often set their own beauty goals, women also have a beauty routine for their own reasons, all based around self-confidence and wellbeing rather than satisfying another's expectations.

The role of the industry

Keeping what we've discovered in mind, how should the beauty industry respond to these findings? Should it seek to change its relationship with women, and accept that the level of influence is less than may be widely assumed?

The real answer is simply not to overreact. The beauty industry remains influential. Women, especially those in Europe (33%) and the US (39%), still turn to the industry for tips and new products, but only if those products provide a solution to those issues that they want to solve. No matter how great the external pressure, it is clear that women only pursue those things that match their own definition of beauty. Right now, more than anything else, that definition is having confidence in who they are as individuals.



Interview with Dr Stefanie Williams

Insight from an expert:

Dr Stefanie Williams, Cosmetic Dermatologist

Dr Stefanie Williams is a German trained dermatologist with special expertise in Cosmetic Dermatology and a passion for healthy skin. She is best known as the founder and Medical Director of the skin care clinic Eudelo, in London's esteemed Harley Street and through her work she has achieved an impressive reputation, being recently named as one of Britain's best cosmetic doctors by Tatler magazine. Her work to date embodies the Philips mission to use innovative technology to help women discover their beauty with ease, while maintaining the highest standards of quality and safety.

Dr. Stefanie, who is also the brand Consulting Dermatologist for the Philips Lumea IPL hair removal range, has impressive expertise in both skin safety and hair removal. As a result, she is perfectly placed not only to help educate consumers about IPL technology, but also to provide us with some useful insights in to the recent findings that our global beauty research has revealed.

1. How big of a concern do you feel that hair removal is for women? What questions do you get asked again and again?

Hair removal is a very significant concern for many women I see in my clinic. Generally, hair-free skin is seen as more attractive in most cultures, so most women use some form of hair removal method. However, with many options available, there are issues, such as the need to repeat nearly daily, or unwanted effects, such a tendency for ingrown hairs. The questions I often get from patients in my clinic is, whether at-home IPL hair removal devices are actually effective and whether they are safe to use. Luckily, these questions are easy to answer. At-home IPL works, is safe and is also very convenient! In addition to this, there are of course questions about the use of IPL hair removal for darker skin types and those with very light hair.

2. Does it surprise you to hear that only 13% of women globally are using an at home IPL or laser hair removal device?

No, it doesn't surprise me at all to hear that only 13% of women are using an IPL, or laser hair removal device at home. The awareness of these at-home devices is low and even if somebody has heard about home IPL hair removal, they may assume that the home method is either not effective, or not as safe as in salon/clinic options. Many women find it hard to believe that a home device like the Philips Lumea Prestige can be both safe AND effective.



In fact, before I started working with the Philips Lumea Prestige, I had doubts myself. It was only when I looked carefully at all the studies and science behind the device that I came to fully appreciate how genius this product really is. I would not have thought that a device with such a low energy fluence (to keep it safe for home use!) could be as effective for hair removal as it is. I, like many others, assumed that home devices would be too weak to be truly effective – how wrong was I! So if even I, as a Cosmetic Dermatologist, was not fully aware of the facts and science behind these home devices, how can we expect other women to be?

3. As someone on the pulse of beauty trends, experiencing first-hand how women's concerns, and the treatments available to address them, are progressing at pace, what direction do you feel the beauty industry is moving toward over the next 5 to 10 years? (Tech, health, natural etc.)

The current trend (which has just started and which I expect to develop much further over the next years) is away from 'artificial' looking beauty ideals (e.g. big lips, overfilled cheeks, orange-toned fake tan etc.), towards skin health and natural beauty. Truly healthy skin has a natural glow that makes it beautiful. So it's all about supporting skin health and skin quality and slowing down the skin's ageing process on a cellular level, rather than painting over the cracks and hiding signs of ageing, addressing them at their root cause. This trend for optimizing and appreciating skin health as the starting point of beauty, partnered with advanced non-surgical treatments to further enhance the skin's appearance, can help women to realize their skin's full potential and become the best version of themselves. Women seem to be aiming more to simply look their best, whatever their age – and embracing it – rather than trying to look like somebody else, or trying too hard to look younger.

As women become more comfortable in their skin, they are getting more comfortable caring for their skin at home, so I can also see home devices developing further and becoming an integral part of each woman's life, similar to skincare. With improving technologies and increasing awareness and acceptance of home devices, I am looking forward to exciting developments in this area.

4. What's the best piece of beauty advice you have ever been given?

Don't succumb to beauty ideals and compare yourself to other people. Just be your best YOU.

Smooth Operator

The challenge

For many women globally, achieving continuously smooth, hair free, skin is an endless challenge, and one that requires time, patience and often a significant chunk of their hard-earned money. Even more frustratingly, despite their best efforts, women are often left unsatisfied with their hair removal results, finding that the common methods all have unwelcome side effects.

Tom Nuijs, PhD, Research Fellow and the creator of the Philips Lumea IPL device, comments that "with daily shaving, women tend to find that their hair grows back incredibly quickly and razors can cause irritation to their skin, while epilation can be painful and waxing requires expensive trips to the salon. Fortunately, at-home IPL hair removal can provide a welcome solution to all of these hair removal dilemmas. Not only can IPL devices help women experience longer lasting, smooth skin, but treatments are also pain free and can be conducted at a convenient time, in the comfort of their own homes."

IPL hair removal on the rise

According to research from the Philips Global Beauty Index 2017, 29% of women said that they would be most influenced to change their health and beauty routine by new products that solve the issues they have. IPL would undoubtedly fit this criteria, solving a number of women's hair removal issues. It is therefore surprising that only 13% of women globally are currently using IPL or laser hair removal methods. This is even more startling, given that research shows that incorporating at home beauty tools in to their routine gives women both faster (33%) and better (31%) results.

Having said this, Philips has seen a 2% increase in women using IPL and laser hair removal in the past year. Whilst 13% is still a surprisingly low figure for women using these hair removal methods globally, it seems more women are beginning to recognise the benefits that these light-based solutions can offer. This is certainly the case in Turkey, where 47% of women now use laser or IPL as their hair removal method of choice, compared to only 7% in France and 5% in Germany. Word of mouth and a growing awareness of the benefits of IPL are likely to ensure a rise in the amount of women using IPL and laser hair removal globally over the next year, as will the new product innovations and the intelligent features we are seeing in the category, such as those featured on the new Philips Lumea Prestige.



The Philips Lumea Prestige

Developed by Tom Nuijs, alongside leading dermatologists and Philips hair removal experts, the new Philips Lumea Prestige at-home Intense Pulsed Light (IPL) device is the latest product in the Philips hair removal range. Clinically proven to reduce up to 92% of hair regrowth in just three biweekly treatments, this IPL device features a number of new innovations and has been specifically designed to provide a tailored hair removal solution for all parts of the body.

Tom Nuijs, the creator of the Philips Lumea device, explains some of the key design features on the updated model, which sets it apart from previous versions. "Notably, the new Philips Lumea device now features an inbuilt SmartSkin sensor," said Tom. "This measures women's skin tone with the simple press of a button, advising the best setting to work most effectively for them, providing a more personalised hair removal solution. The device also features four bespoke attachments for the legs, face, bikini line and armpits, with different window sizes, curved shapes and filters, for easy and effective treatment on the whole body. Additionally, the device can now be used both corded and cordless to speed up treatment times so women can treat a lower leg in under 8 minutes, while the



Beauty Redefined

A fresh look at the role of beauty in women's lives

There can be no doubt that the traditional interpretation of what 'beauty' means is quickly becoming irrelevant in today's world. At its simplest, it's semantics – but delve deeper, and the changing definition of what it means to be truly beautiful shows a deep ideological and philosophical shift in women's attitudes. This demonstrates that beauty now transcends physical appearance and links more closely to health and wellbeing.

With 82% of women globally agreeing that when they feel healthy, they also feel beautiful, results of the third annual global Philips Beauty Index point to a growing emphasis on the overall link between health and its relationship with beauty.

So, what's really changed? How do women feel about themselves when it comes to beauty and its many forms? Who influences the definitions? And what is the industry going to do about it?

Perception of self

A high proportion of women around the globe (70%) believe that beauty is something you define for yourself – dissing the traditional beauty ideal and embracing diversity in beauty. In fact, women in Russia (87%) and India (83%) are the most likely to agree that beauty is something they define for themselves.

Challenging beauty stereotypes and industry imposed definitions, more and more women admit that there isn't one universal type of beauty. Building on last year's research, where we saw an explosion of the 'selfie' and its impact on self-confidence, we've since seen a backlash of the anti-trend now urging unfiltered, natural, healthy body and beauty images on social media – all pointing to a general shift away from outward beauty towards overall wellbeing.

Layer that on top of the rise of wearable technology which gives consumers an unprecedented insight into the inner workings of their body and the constant tracking of their health and wellbeing – and it really is no surprise that women are now prioritising a healthy outlook and overall 'wellness' as intrinsic to beauty.

In 2016, three in four women agreed that when they feel healthy, they are more likely to feel beautiful (76%) and encouragingly, that figure is even higher this year with 82% agreeing to the sentiment. When asked which aspects are most important to defining their sense of beauty, the top three chosen by women around the globe were: having a positive mind-set (89%); feeling emotionally balanced (85%); and being physically fit (81%).

The beauty celebrity dethroned?

Once the go-to for beauty advice, we're seeing more and more women shunning the television celebrities and instead turning to health and wellbeing experts for their beauty advice. An indicator of women's growing appetite for informed opinions and an increasing interest in scientific evidence pointing to the relationship between health and beauty, we're now seeing three in four women turning to health experts (73%) – which is significantly more than those turning to more traditional sources of beauty knowledge such as journalists (43%) and celebrities (51%). When asked specifically about who women turn to when it comes to finding the right beauty products and brands for themselves, friends and expert advice also come before celebrity sources.

Interestingly, we're also seeing that in 2017, women are more inclined to forgive their favourite celebrities' physical flaws and aren't looking to them for perfection. While women do still look to celebrities (51%) or public figures (49%) for beauty inspiration, they admit to finding their confidence and comfort in their own skin to be the most attractive celebrity trait. In fact, this revelation further validates another recent study by Philips exploring beauty icons (source Philips 'Meaning of Beauty' report from C-Space) that shows women are increasingly drawn to celebrity icons due to their natural beauty as they see the 'girl next door' celebrity as far more relatable and down to earth.

While external influences such as the media and celebrity culture no doubt still has some impact on one's perception of beauty, we're also seeing more and more women turn to friends and family for beauty advice. In particular mothers and grandmothers were most frequently cited as having given the best beauty advice. Interestingly, women in India

(37%) and Turkey (30%) were most likely to say their mothers had the biggest impact on their relationship with beauty.

Confidence boosting advice and chats with mum are perhaps also why women from these countries also feel the most beautiful (96% in India and 91% in Turkey) showing strong feelings of self-confidence in these markets.

A changing industry

As the concept of a more 'holistic beauty' industry gains pace – with more than half of the women worldwide agreeing that advancements in technology and ingredients are helping (56%) achieve this – so too does the industry need to change. While women predominantly want beauty products that work and are easy-to-use, there can be no doubt that there is a growing demand for organic, eco-friendly, vegan and halal products. Given the rise of the ethical and conscious consumer, this will be a key market for future industry innovations.

Furthermore, women are interested in not only being healthy but in cultivating an overall healthy beauty mind set. Whether that be prioritising eco-friendly (72%) or organic (70%) beauty products or feeling emotionally balanced, 85% consider this important to defining their sense of beauty.

So while the industry continues to focus on products that work well, give visible results and are easy to use (still the key drivers for most consumers) it would be remiss not to focus on ethical and environmental attributes. As the entire concept around beauty shifts, and a move towards a healthy and ethical lifestyle ensues – so does consumerism – and the beauty industry must move with it.



Beauty across the globe



The Atlas of Beauty

In 2013, armed with a backpack, a camera and a handful of savings – Mihaela Noroc set off across the world to photograph as many diverse women as she could, in all kinds of environments. Having photographed more than 500 women in over 50 countries, her project, The Atlas of Beauty, aims to question our understanding of what beauty is and how diverse it can be. Its message is universal: beauty is everywhere.

Now four years since she hit the road, millions are flocking to her social media channels and she is set to release her own book showcasing the images this autumn. To celebrate the third Philips Global Beauty Index, and fitting perfectly with the Philips brand vision and global beauty offering, Mihaela is curating an exclusive exhibition of her photographs.

Tell us a bit about yourself

I've spent most of my life in Bucharest, the capital of Romania, a place roughly equidistant from Western Europe, Asia and Africa. The 1990s, when I was growing up, were difficult years in Eastern Europe, with a lot of unemployment and poverty. As a result, my family moved often. Almost every year I would be sent to a new school, have to get used to a new neighborhood and make new friends. Back then I suffered each time I had to leave one group of friends for another, move from one town to another, but years later

I realized that this gave me the capacity to adapt and take photos in so many environments.

What inspired you to become a photographer?

My father is a painter so I spent my childhood surrounded by his paintings, enjoying the diversity of colors. When I was 16, he gave me an old, second-hand film camera. I was too shy to go on the streets and take photos of strangers, so my first subjects were my mother and my sister. That's how I started to photograph women, in a natural and very low-key way. At night, when my family was sleeping, the bathroom was mine and I would transform it in a darkroom to print my photos.

I went to University to study photography but received little encouragement. These were the years of the digital boom, when everybody started to buy a camera, and I saw myself as just another average photographer surrounded by millions of other photographers. I felt that the world doesn't need another mediocre artist, so I left photography for a while. I took work in other fields for money and a practical future, without really enjoying what I was doing.

For years I felt that I was in the wrong place, but didn't have the power to escape. Then, in 2013, a trip to Ethiopia changed my perspective. I brought along my camera, just like any other tourist, because I didn't consider myself a 'real' photographer anymore. Right away, I was fascinated by the women I saw during that

vacation. Some were living in tribes, just as nonchalant about nudity as their ancestors had been generations before. Others were part of conservative communities, covering their heads. And still others, in the big cities, were embracing modern life.

Most of them were struggling and working hard, sometimes facing discrimination as women. But in these harsh environments, they were shining like stars with dignity, strength, and beauty.

"If there's so much beauty and diversity in one country, what about the entire world?" I wondered. I realized that the wonderful women of our planet need much more attention and that true beauty is more than what we so often see in mass media. So after many years I started to dream again, found the strength to escape my comfort zone and to quit my job and go back to photography. I started to travel, take photos and, little by little, I regained my self-confidence.

How did The Atlas of Beauty take off?

In the beginning The Atlas of Beauty was just a small, personal project, funded with my savings, known only within my country. I traveled on a very low budget, as a backpacker, mingling with the locals and trying to understand their cultures.

After a while the project took off on social media, something I had never imagined would happen. Millions of people were looking my photos, and my email inbox filled up with messages from around

the planet. Sometimes, people even recognized me on the street. Some were thanking me, saying that I changed their way of looking at women, while others were telling me that I have to add more consistency to it. I was particularly happy that not just women, but also men, were interested in my work.

I now had a mandate: I would have to work harder, capture more diversity, and find more inspiring stories in order to send a message that really would be heard. People from all over began to donate to the project, allowing me to continue my work independently.

Traveling in so many fascinating places has given me the best times of my life, but also the most challenging. I've been close to war zones and wandered through dangerous slums. I've been freezing, sweating, crying. I've been out of money, and I've been ill while far from the comforts of home. But meeting so many wonderful women kept me moving forward on my path with enthusiasm.

I've been refused by hundreds of women whose portraits I had hoped to make, and I saw how discrimination and pressure weigh on the shoulders of so many. Some were simply scared to be photographed, even if they might have loved it. Others were not confident enough. But I'm very grateful to all women I met, whether they said yes or no to my proposal. Sometimes we spent a few seconds together, other times an hour, but from each of them, I learned something.

Beauty rituals and experiences



The Beauty Advisors

Your beauty rituals and experiences are entirely subjective, based on your own unique beauty issues, problems and preferences. It's incredibly unlikely that you will meet another woman who follows the exact same routine, using the exact same products as you do. This is not just because of the huge array of products and treatments that are now available to women across the world, but because we have all obtained beauty advice from different people and different sources throughout our lives, which have undoubtedly influenced our beauty decisions.

Mum's the word

Research from the Philips Global Beauty Index 2017 shows that one of the central ways we obtain beauty advice is through family, friends and colleagues, with 56% citing this as the most common way they engage with beauty brands.

Unsurprisingly, the most common person we turn to for beauty guidance is our mother, whom 18% of women globally cite as the person who has the greatest impact on their relationship with beauty. This is particularly true for women in India where 37% of women surveyed cite their mother as a key influence, closely followed by Turkey (30%), the UK (26%) and the USA (26%). However, the statistic is surprisingly much lower for China (8%), Japan (12%) and Korea (9%), with these countries citing either their best friends or television as the sources which have the most impact on their relationship with beauty.

Nonetheless, women the world over are clearly depending on their personal relationships to provide them with the beauty guidance they need to help them form their rituals and experiences.

Modern media

In addition to family and friends, women continue to gain beauty advice through a number of other channels, such as magazines and newspapers. Though slightly less important than personal relationships, 40% of women do still use traditional media to engage with their favourite beauty brands. Having said this, the influence of magazines and newspapers does appear to be on the wane in 2017, with only 15% now using journalists to discover new beauty products, compared to 25% of women using magazines to find beauty inspiration in 2016. In comparison, more than double this amount (31%) now use bloggers and vloggers to find out about new beauty brands. This suggests that the media landscape is shifting, to favour relatable, creative

content over written articles as a means of gaining beauty advice. This certainly seems to be the case in Turkey, where 48% of women surveyed said they had sought out beauty advice from social media and bloggers. Having said this, a number of journalists are now cleverly utilising their own social media channels to become micro-influencers in their own right. These editors and directors are increasingly gaining large followings of women, who trust their opinion as beauty experts and consequently find their personal content, credible as well as engaging. The line then, between traditional media and social influencers, is no longer distinct, and women are increasingly finding themselves interacting with a more fluid, modern media to obtain beauty guidance and advice.

The celeb factor

Interestingly, data from the Philips Global Beauty Index 2017 indicates that social media and bloggers are actually almost as influential when it comes to shaping women's beauty rituals as traditional celebrities. While 29% of women globally use celebrities to find beauty inspiration, 26% of women use bloggers and vloggers for the same task. Having said this, celebrities clearly do still have an effect on the way women interact with beauty, with two out of three women globally agreeing that celebrities put pressure on women to look a certain way. In fact, 4% of women surveyed actually cited celebrity recommendations as the most influential reason to cause them to change their health and beauty routine. Rather, products that solve the personal issues they have (29%) and advice from friends and family (18%) hold a lot more sway when it comes to changing their beauty routines.

The Philips Global Beauty Index 2017 clearly shows that there are a number of different ways women obtain their beauty advice and correspondingly, a number of factors that influence women's beauty rituals. While personal relationships appear to be the most important means when it comes to guiding women's beauty decisions, beauty is clearly a personal journey and something women define for themselves. The result is a world where every woman has a different definition of what beauty means to them. This is a fantastic thing, with research clearly showing that perceptions of women who feel beautiful on their own terms, are more consistently positive than feeling beautiful on someone else's terms. It is also something that Philips fully embraces and celebrates, aiming to help women find the correct solutions for them, so they can discover their beauty, every day.

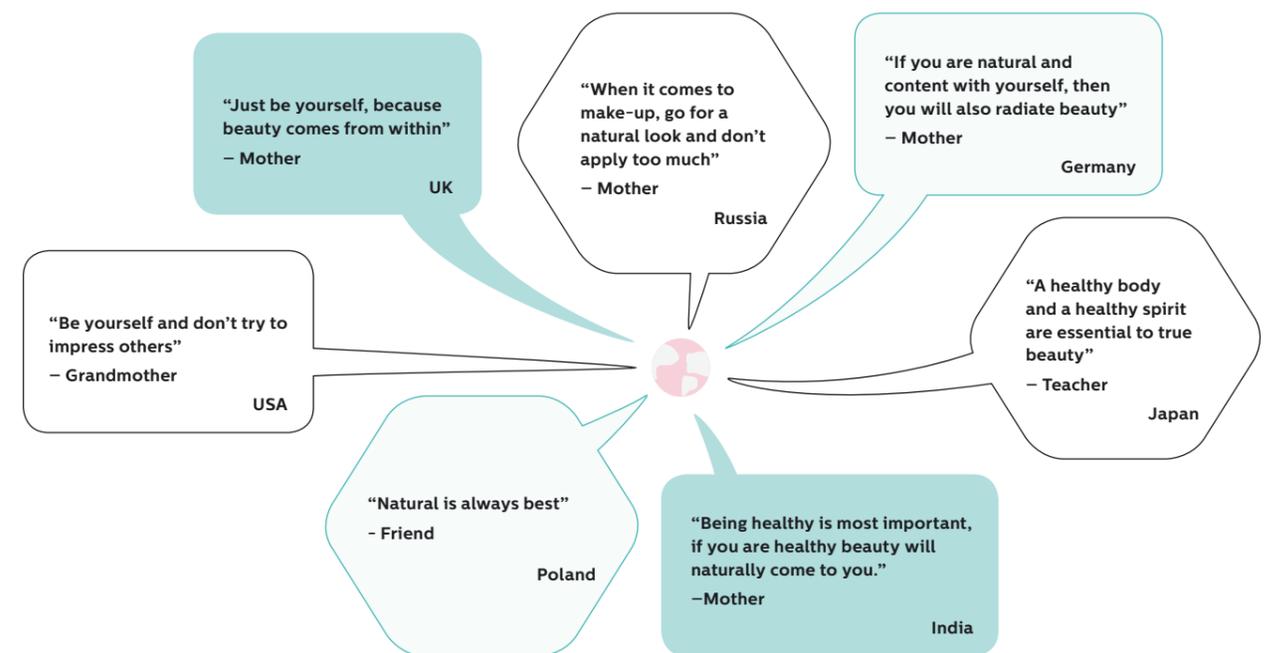
The best piece of beauty advice I ever received was...

As part of the Philips Global Beauty Index 2017, we asked more than 11,000 women from 11 different countries the best piece of beauty advice they had ever received and just as importantly, who they had received it from. The results were varied, spanning everything from drinking more water, to meditation, to applying moisturiser every evening. The people providing these tips were similarly diverse, ranging from bloggers to teachers, friends and family members.

Yet despite the wide array of responses this question received, there were some pieces of advice which appeared to resonate across all markets, cropping up repeatedly in women's answers. These responses were not product or treatment based, but rather firmly rooted in confidence, self-belief, happiness and wellbeing. They also, most often, were passed on from women's mothers or grandmothers, suggesting women obtain a significant

amount of meaningful beauty guidance from the maternal figures in their lives.

Clearly for women the world over, defining beauty for themselves is incredibly important, while the idea of holistic beauty also resonates strongly. A vast majority (89%) of women believe that there are lots of ways to be beautiful, suggesting that they prioritise being themselves, rather than trying to fit into a predefined model of beauty. For many women, beauty is also not simply surface appearance, but encompasses health, confidence, and wellbeing. Many women feel that these factors are in fact mutually dependant, with inner health and beauty being inextricably linked to their outward appearance. The majority of women (82%) actually cited that when they feel healthy they feel more beautiful.



Interview with Ilham Mestour

Insight from an expert:

Ilham Mestour leading global hair stylist

Ilham Mestour is a leading global hair stylist, with over 20 years of experience in the beauty industry. During her career, Ilham has styled hair for leading publications such as Vogue, Harper's Bazaar, Elle and Vanity Fair and is a favourite of models and celebrities alike. Her approach to hair is to treat it as a craft and art form, while her two guiding principles of technique and perfectionism, ensure that the styles she creates are flawless and coveted by women the world over.

Research from the Philips Global Beauty Index shows that hair is often an integral aspect in helping women to feel beautiful, with the vast majority of women globally owning hair styling tools. As a hair stylist who deals with women's hair problems and concerns on a daily basis, while also having fabulous hair herself, Ilham is perfectly placed to provide further insights into the role that hair plays in women's daily lives.

We asked Ilham to shed some light on a number of hair-related questions.

1. According to the Philips Global Beauty Index 2017, 61% of women feel the beauty industry puts pressure on women to look a certain way, does this statistic surprise you and do you think this extends to the hair styles women wear?

This statistic doesn't surprise me as I think there are now pressures on women coming from so many different places; from advertising on TV, magazines, billboard, social media, online videos and comments from others. The pressure on women to be perfect in all areas of life, be it education, work, looks or relationships and to present a perfect image on social media, is immense. I definitely think that this extends to how they choose to express themselves with their hair styles.

2. As a leading global hair stylist, what is the most common hair care problem women come to you with?

There are very few women in the world who can claim that they have never suffered from any hair problems. In my experience, the two major enemies to healthy hair are stress and pollution. I see a number of women every day who experience frizzy hair as a result of pollution, dust and dirt and a similar amount who experience split ends and hair breakage due to heat exposure.

3. Heated hair styling devices are by far the most popular at home beauty tools for women globally, why do you think women want to style their hair so much?

I think one of the reasons women want to style their hair so



much is because they want to replicate the looks they are seeing celebrities, influencers and role models wearing. They want to follow certain hair trends, primarily because it boosts their self-esteem. In addition to this, I think women see a new hairstyle as a new beginning and this is a key reason why women love to change their hairstyle so often.

4. To what extent do you think hair styling can effect women's perception of their own beauty?

I think all women want to be physically attractive and want to be perceived as such. Looks are incredibly important to how we feel about ourselves. Importantly, our hair is one aspect of our appearance that we can control, so it's empowering for women to make changes to their hair, especially when they perhaps feel like other aspects of their lives are out of control.

5. In the Philips Global Beauty Index 2017, we have seen that more women globally own hair curling devices (59%) than straighteners (40%). Does this correspond with the styles women request in the salon? What other key hair trends you have seen grow in popularity this year?

The perfect beach wave is a key trend which I think has significantly increased the popularity of curling devices in the past year. In the past many women were married to their straighteners, but now women want to express their true beauty and are leaning more toward natural styles, right now it's all about natural wave / curly hair! Personally I find poker straight hair is cold and expressionless, so I actually prefer to embrace the curly trend or try to maintain the volume of my hair when straightening. However, when it comes to styling your hair, it's really all about our natural desire to want something we haven't got, so women with straight hair often want to style it curly and vice versa. What I find fascinating though, is how much changing hairstyles can reveal about a woman's mood and personality and I think self-expression is actually a key reason why women use a lot of different hair devices to change their hair.

6. What's the best piece of beauty advice you have ever been given?

The best piece of beauty advice I have ever been given was to embrace my curls and love them! This is now largely what I do; I simply enhance my natural curls rather than blow drying and straightening to try and get rid of them! That said, it does depend on my mood and I do sometimes blow dry my hair and change my style depending on how I'm feeling. Like all things in beauty, it's about expressing my own beauty, as defined by me.

The Super Stylers

For many women a 'good hair day' forms a solid basis for having a good day in general. Achieving perfectly styled, well-nourished hair makes women the world over feel more confident and comfortable in their own skin. In fact, research from the Philips Global Beauty Index 2017 shows that an astounding 75% of women globally feel more confident when they have made an effort with their appearance. Furthermore, women often cite styling their hair as a key reason why they feel beautiful on special occasions. For example, 38% of brides and 50% of maids of honour felt more beautiful on a wedding day thanks to their hair style.

Beauty tools of choice

Clearly then, styling hair is an important aspect for women when it comes to feeling beautiful and this is never more obvious than when we look at women's most commonly used beauty tools. Philips research shows that women globally favour hair styling tools more than any other electronic beauty device. A hairdryer is the most common at home beauty tool used by women globally (79%), followed by hair curlers and tongs (59%) and hair straighteners (40%). This clearly reflects the growing trend we are seeing for curly, tousled styles over super sleek, straightened looks.

On a more local level, women in Turkey are particularly fond of hair straightening devices with 67% of those surveyed claiming to use hair straighteners, followed by 54% of Indian women who also own a straightening tool. However, when it comes to curling devices, China stand out as the market who favour curly styles the most, with 88% of Chinese women surveyed using a curler or tong. Comparatively, France are a notable outlier when it comes to curling hair with only 8% of French women surveyed using a hair curler.

Great style versus damaged tresses

Overall, it's safe to say that a huge number of women globally are striving to achieve salon perfect styles using heated styling tools. Unfortunately however, women are increasingly aware that heated devices can cause significant damage to their hair when used regularly. While many women treat their damaged tresses with expensive, nourishing products to counteract the effects of heat styling, an incredible 78% of women actually resort to styling less because they are afraid of damage.

Philips understands that women want to be able to continue styling their hair, but without compromising on its health. As a result, Philips has developed the new Philips Nutri-Wonder straightener and Philips StyleCare auto-curler, two devices that enable women to achieve the salon styles they covet, but without causing unnecessary damage to their hair.

Philips Nutri-Wonder straightener

The Philips Nutri-Wonder is the first ever styling tool to nourish hair as it straightens, allowing women to achieve perfect, silky smooth styles, while treating their hair. Featuring advanced heat protection and a unique blend of Avocado, Camelia and Argan oils and Vitamin E, captured in removable covers, this innovative new straightening device uses ActiveRelease technology to nourish hair with every stroke. The plate covers create beautiful styles, while also being gentle to hair.

Philips StyleCare auto curler

The new Philips StyleCare auto curler is an innovative new styling tool that enables women to achieve healthy, salon-style curls, quickly and effortlessly, from the comfort of their own home. Featuring a longer barrel with 113% more curling surface than the previous Philips device, the Philips StyleCare auto curler enables women to style twice as much hair in one go. The unique new open design of the Philips StyleCare auto curler has also been shaped vertically, to follow the natural flow of the hair, meaning there is less chance of women's hair becoming trapped. This enables them to style confidently and effortlessly, knowing the health of their hair is being protected, so they can quickly and easily create their dream curly styles and discover their beauty, every day.



Interview with Chico Shigeta

Insight from an expert:
Chico Shigeta, facial massage expert



Chico Shigeta is a world renowned beauty expert with her own tailored method of massage uniting influences from both Europe and Asia, using her own uniquely designed, global product range. Her Paris based salon plays host to international celebrity clientele such as, US actress Sofia Coppola and French actress Isabel Adjani who come from across the globe to experience her miraculous massage results.

In Japanese culture, facial massage is a natural part of many women's health and beauty routines and the 2017 Philips Global Beauty Index highlighted the importance of this holistic approach to beauty with 44% of women in Japan stating they are motivated to maintain their daily beauty routine in order to feel healthy.

According to the Philips Global Beauty Index 2017 at-home treatments (59%) are the second most popular thing which women have incorporated into their beauty routines after wearing make up (60%), so it is evident that the ability to conduct these kinds of treatments themselves, at home, is important to women globally.

Philips partnered with Chico Shigeta to develop a massage method which allows women to conduct an effective facial routine at home using the Philips VisaPure Advanced. The collaboration combines the expertise of Chico with the innovative technology used in the three-in-one facial skin care tool, the Philips VisaPure Advanced, and the method is designed to help women relieve their facial muscles and stimulate blood circulation for more radiant and revitalized-looking skin.

We got in touch with Chico to discover some of the secrets of facial massage:

1. What does beauty mean to you?

I became interested in beauty at a very young age after observing my mother and grandmother working in their beauty institute. One day, I realised that it wasn't just aesthetics, but it was the confidence you have in yourself and your freedom that makes you attractive. Beauty is not found only on the surface of the skin. My approach goes deeper.

2. What are the benefits of facial massage on the skin?

There are many benefits to facial massage, however, I would have to say that the main benefit would be how it detoxifies the skin and stimulates blood circulation to give women more radiant and firmer-looking skin. In Japan, facial massage is a very natural part of our culture and included within our daily beauty regime for more radiant, beautiful skin, every day.

3. What's the advantage of the Philips VisaPure Advanced over in salon treatments, or conducting your own facial massage?

The benefit of Philips VisaPure Advanced, is that women can do their facial any time they want without having to go to the Spa. Facial massage is something that comes naturally within Japanese culture, Philips VisaPure Advanced makes it easier for women to recreate these treatments at home. The Petrissage massage technique which the Philips VisaPure Advanced mimicks, uses the finger tips in a very gentle and smooth movement across the face which improves blood circulation and gives skin a much smoother texture and appearance.

4. Pollution and urban living is a hot topic in the beauty industry, how can women help combat it's affects?

Not only can lifestyle and pollution lead to a buildup of impurities on the skin, but stressful urban living can also cause contraction in the back, shoulders and neck. This can cause facial muscles to contract, making the skin lose its elasticity so that it appears to sag and age. In addition, we're seeing women spend an increasing amount of time staring at screens; from mobiles, to laptop and tablet devices. This can cause their eye muscles to contract and lead to a loss of firmness in this area, resulting in eyes appearing puffy and smaller. My new Philips VisaPure Advanced technique is designed to stimulate the skin to combat all of these issues.

5. What's your favourite part of your beauty routine?

Facial massage is definitely my favourite part of my beauty routine because the effect is immediate. It leaves you feeling so relaxed and revitalized with colour in your cheeks and I love it!



The pollution Solution



What's the issue?

City dwelling has its advantages, including unrivalled career prospects, a fantastic social scene and a huge range of museums and theatres, however there is one significant negative: pollution.

Pollution is an increasing issue the world over, not just for the atmosphere, but also for skin. Though too small to see, pollution particles surround women wherever they are and whatever they are doing, becoming ingrained in their skin as they go about their daily lives. These particles can cause significant problems for women's complexions, causing harmful reactions with the skin's natural chemicals. If not removed, pollution particles can lead to the degeneration of collagen, premature ageing, pigmentation and wrinkles, meaning the polluted skin of today is the ageing skin of tomorrow.

Philips skincare expert Natallia Uzunbajakava, Philips Senior Scientist & Project Lead explains more.

"Though women are becoming increasingly aware of the damaging effects pollution can have on their skin, removing these pesky particles is a more difficult feat than many realise," Natallia explains. "Pollution particles are up to 50 times smaller than the size of a pore, meaning cleansing by hand is ineffective as the flat surfaces of women's fingers are unable to reach inside pores to clean them. As a result, they need specialized cleansing tools to help remove the harmful particles and prevent adverse reactions, such as premature ageing, from occurring."

"The 2017 Global Beauty Index looked at the motivations behind women's global beauty routines and the beauty tools they use the most. The findings showed that while a significant 27% of women globally conduct a daily beauty routine in order to keep their skin looking clear and radiant, only 14% of women actually use an electronic cleansing device. Though this figure has increased by 3% from last year, it nonetheless means that a significant amount of women are cleansing ineffectually and unknowingly leaving harmful pollution particles ingrained in their skin."

The one notable exception to this global statistic, Natallia observes, is China, where 39% of women surveyed use a facial cleansing device. "This is a significant figure when compared with countries such as Japan, the UK and France who answered 6%, 7% and 8% respectively," she explains. "But the amount of women using these devices in China, can likely be linked to the increased awareness of the pollution problem in this country. As more people begin to recognise the harmful effects of pollution in other countries, I expect we will see the statistic of women using facial cleansing devices in these places, increase correspondingly."

A solution

Using its insights on pollution, Philips has developed the Philips VisaPure Advanced Anti-Pollution, a three-in-one skincare tool, specifically designed to provide women with an effective city detox to counteract and prevent the harmful effects of pollution.

Skin detox

The new Philips VisaPure Advanced Anti-Pollution cleansing brush head, featured on the Philips VisaPure Anti-Pollution is clinically proven to be as gentle as hands, but has the power to remove up to 100% of pollution particles. The brush head uses a charcoal sponge made from bamboo wood, which works like a magnet to attract and absorb the dirt and oil clogging the skin. When combined with silky soft bristles, the cleansing brush works to dislodge even the smallest of pollution particles from pores, enabling women to achieve refreshed and radiant complexions despite their busy city lifestyles. Developed with leading Japanese massage experts, the Revitalizing Massage and Fresh Skin attachments further work to relax the skin and increase its radiant glow, helping to revive tired, sagging complexions and combat the tell-tale signs of pollution.

The Philips VisaPure Advanced Anti-Pollution effectively cleanses, massages and refreshes tired, pollution damaged skin to give women a radiant and healthy glow and help them to discover their beauty, every day.



The Diverse Beauty Consumer

Since the inception of the Philips Global Beauty Index in 2015, we've seen a steady increase in the number of women who consider themselves to be beautiful. With a 9 point increase from when the research first began in 2015, 60% of women globally now feel beautiful. However, while this is a common theme globally, cultural and societal nuances do still impact consumer behaviour differently across the geographies surveyed.

We found that not only do perceptions of beauty and external pressures to 'be beautiful' change from country to country, so do women's values, ethics and priorities – and therefore their spending patterns and consumer behaviours.

So, what do these women look like? What makes them tick? And what do they want from the industry?

1. The Conscious Consumer

From Fairtrade coffee, to pole-caught tuna, to cruelty-free lipstick, the implosion of the 'conscious consumer' across industries has been on our radar for some time now, and it appears that the beauty industry is no stranger to her. In fact, year on year we're seeing more and more beauty consumers prioritising eco-friendly (72%) or organic (70%) products, and increasingly we're seeing that cruelty-free, Halal, or vegan products are important to different markets.

In India (77%) and Turkey (66%) in particular, making ethical choices about beauty products and brands is considered particularly important. Correspondingly, these are the top two countries to consider ethical values when making their beauty purchasing definitions.

In line with the more general trend in the rise of the conscious consumer. Then, it's really no surprise that ultimately,

conscious consumers are actually seeking out the brands that show themselves to align with their own ethical values.

With labels denoting a product's ecological, organic, or ethical credentials now a key consideration for many consumers, we're seeing more and more of these products rise to the forefront of the industry.

2. The Functionality Focused

Despite the move towards more ethical products however, functionality still remains key for many beauty consumers worldwide. Ultimately, women are likely to prioritise buying beauty products which deliver results and fit into their routines easily.

Our research shows that 86% of women globally still cite 'effectiveness' and products that provide 'visible results' as the most important factors when considering purchasing from a beauty brand. This is followed closely by a products 'ease of use' (85%), showing that ultimately, women want products that deliver visible results and are uncomplicated to use.

3. Healthy at heart

In 2017, women are interested in being healthy and cultivating an overall healthy beauty mind-set.

With 85% considering feeling emotionally balanced as important to defining their sense of beauty and 81% attributing feeling physically fit to feeling beautiful, there can be no doubt that a focus on health drives today's beauty consumer.

In Western Europe, we've seen women increasingly looking to wellness apps and devices, such as fitness trackers to help them maintain not just a healthy state of mind, but also their appearance.

In fact, women across the world are more likely to add a wellbeing behaviour to their routine than a beauty behaviour, with 94% of women globally saying they have made some attempt to lead a healthier lifestyle.

Hydration, exercise and taking natural supplements and vitamins are now all considered part of a regular health and wellbeing routine, with 71% of women drinking more water as part of their beauty and wellbeing routines. But while this definition of 'new beauty' deems activities like exercise, yoga, clean eating and meditation as paths to beauty, less than one in four women believe that the beauty industry is keeping up with this focus on health.

This highlights a pressing need for beauty companies to respond to what women want and need, in order to be their healthiest, happiest, most beautiful selves.

4. The Traditionalist

Despite many women now seeing beauty as rooted in health, most women still feel the traditional pressures from society, the media and their peers to look good. Women in the US in particular, feel a lot of pressure, with one in five saying they feel pressure to always look beautiful, because the beauty industry makes them feel inadequate.

In India, where 96% of women consider themselves to be beautiful, it's interesting to note that half of these women still take a traditional view of beauty, believing that beauty and physical appearance are one and the same. Looking attractive is also most important to those in Russia (83%), China (82%) and South Korea (82%), while the French are least concerned with looking beautiful (11%). In the UK, just over half of women considered looking attractive to be important (52%).

Interestingly, women in India (37%) and Turkey (30%) say their mothers have the biggest impact on their relationship with beauty. Surprisingly, these markets also have the highest rates of women saying they feel beautiful, suggesting that mothers in these markets have a strong role in cultivating women's perception of beauty.

5. The Customization Queen

As we see multiple definitions of beauty itself, different types of beauty influencers and a diverse range of beauty consumers, it comes as no surprise then that demand for unique products that can be customised to suit different tastes, priorities and beauty values is increasing.

In this year's research, we see women declare a growing (39% globally, up from 33% in 2016) expectation of the beauty industry to focus on personalisation when it comes to beauty products. This expectation ties in with a broader trend, with many studies showing that women feel frustrated by the beauty product shopping experience, as they feel like they are wasting money on products that are not right for them. By providing a customised approach to beauty, women would be able to quickly identify the right products for them (either in-store or via apps), wasting less money and time on their shopping experience.

In other sectors, including technology, food and entertainment, customization is definitely on the up. As such, the beauty industry would not be remiss to push personalised product offerings higher up its agenda.

Philips is committed to helping improve people's lives through meaningful innovation tailored to women's beauty needs with personalisation being a core part of that commitment.



Beauty Manifesto

Philips believes that **beauty** is a wonderful energy that exists inside every woman.

It **evolves** and grows - alive and ever-changing.

And so, in this way, beauty is a **journey**; a journey of self-discovery and experimentation, for every single one of us.

It might not be easy every step of the way, but the important thing to remember is that beauty is always there **inside you**. And that the power to enjoy and nurture it deserves to be in your hands.

That's why, at Philips, we care about creating the next generation of beauty **tools** for the women of today.

To help bring out the **beauty that every woman was born with**, so we can feel beautiful in our own way, every day, no matter where life takes us.

Discover your beauty.
Every day.

PHILIPS

