

# BEAUTY MEETS WELLNESS: A GLOBAL INITIATIVE



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## London Roundtable & Interactive Forum Summary – September 25, 2017



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### INITIATIVE INTRODUCTION – VISION AND MISSION

We live at a unique time where beauty, health and wellness are rapidly converging in meaningful ways. The understanding that beauty is more than just “skin deep” is seeping into the global consciousness – a deep realization we can only be our most beautiful selves when we are in our most healthy state – physically, emotionally, socially, intellectually, professionally and spiritually.

The beauty and anti-aging industries were valued at US \$999 Billion in 2015 according to the Global Wellness Institute’s newly released Global Wellness Economy Monitor, January 2017. This represents an approximate 27% share of the Global Wellness Economy.

According to Dr. Mehmet Oz:

*Beauty isn't some vapid and superficial pursuit that exists solely to sell products, wag tongues, and produce drool. Beauty is actually precisely perceived, purposeful, and rooted more in hard science than in abstract and random opinion. From the time we started prancing around the world with our body-hair parkas and leafy lingerie, evolution has pushed us to be more beautiful. And that's why beauty serves as the foundation for **our feelings, our happiness, and our existence**. In fact, beauty doesn't reflect our vanity as much as it does our **humanity**. Beauty is **health**...*

*This kind of traditional beauty—the outer kind—really isn't just about looking good. **Outer beauty serves as a proxy of how healthy you are**; it's the message you send to others about your health.*

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*Beauty was the best way to figure it out (and in a tenth of a second, mind you). Now, if you take the concept of beauty a few steps deeper, you realize that inner beauty—the idea of **feeling good and being happy**—also has tremendous health implications in every aspect of your life.*

What is your belief about beauty? What we believe ultimately impacts what we decide. What we decide determines our **outcomes** in life.

Sometimes we live life hiding behind beauty, trying to cover something up, trying to be something different as opposed examining our belief system and choosing confidence, and acceptance of who we are in order to live our best lives.

## VISION

The vision of **Beauty Meets Wellness Initiative** is to (1) identify the intersection between beauty and wellness, (2) create a new narrative which defines well beauty, and (3) generate evidence-based information and resources which help reposition beauty as a positive and dynamic contributor to the health and well-being of consumers worldwide.

## MISSION

To scientifically connect beauty with wellness by developing expert knowledge and resources to:

1. accelerate the beauty industry's ability to create new markets which anticipate and surpass the evolving needs of today's health conscious consumer, and
2. facilitate positive change in the state of his or her health and well-being.

## SUMMARY OF THE LONDON BEAUTY MEETS WELLNESS ROUNDTABLE & INTERACTIVE FORUM

On September 25, 2017, thirty-seven participants came together from around the world to engage in the second of three scheduled VIP International Roundtables and Interactive Forums on the topic of Beauty Meets Wellness. A Summary of responses to each question posed follows. Upon

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completion of all three roundtables a summary white paper will be released comparing and contrasting responses from the roundtables collectively.



## **ESTEEMED LONDON VIP PARTICIPANTS**

Miranda Allard	CEO	SpaStaff.com
Susan Auld	Director	Spa Vision, Ltd.
Aysha Awwad	Director	Medico Beauty Ltd.
Nils Behrens	Managing Director & Chief Marketing Officer	Lanserhof Group
Katie Brindle	Founder	Hayo'u Method
Mike Bruggeman	CEO & Chief Formulation Officer	OM4 Organic Male

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Kicki Carlsson	CEO	Drom UK, Ltd.
Debbrah Craven	Founder and Director	House of Life
Saisangeeth Daswani	Head of Advisory - Fashion, Beauty & APAC	Stylus
Pierre-Louis Delapalme	CEO & Co-Owner	Biologique Recherche
Nora Elias	Editor	World Spa & Wellness
Esther Fieldgrass	Owner	EF MdeiSpa
Don Genders	CEO	Design for Leisure
Anna-Cari Gund	CIDESCO, President, Managing Director	Raison d'Etre
Darren Hewitt-McLaren	Senior Beauty PR Manager	Aisle 8
Jim Higginson	Operations Director	Aromatherapy Associates
Marian Hook	Director, Training	ESPA International
Viktoria Ivanovenya	Owner	Butterfly of London
Jane Kitchen	Managing Editor	Spa Opportunities and Spa Business
Debbie Leon	Director	Fashionizer Spa, Ltd.
Dr. Rabia Malik	Cosmetic Doctor and General Practitioner	SkinW1
Sarah McCartney	Founder	4160Tuesdays
Jeeta Mona	Senior Group Product Manager	Yardley of London Ltd
Eve Oxberry	Head of Editorial	Professional Beauty
Louise Riby	Managing Director	Elemental Herbology

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Emma Roberts	Head of Sales	Voya
Shahida Siddique	President & CEO	ALTERAH SAS
Jayn Sterland	Managing Director	Weleda
Isobel Stockdale	Head of Spa, Tourism & Wellness	University of Derby
Dr. Christine Stossier	Assistant Medical Director	VIVAMAYR Medical Clinic
Lynn Taylor	Consultant	The Milton Agency
Sarah Todd	Contributing Editor	European Magazine
Claire Way	Managing Director	Spa Strategy
Emily Whelan	Formulation Innovation Manager	Oriflame

## SESSION OBJECTIVES

1. To solicit input from a broad range of industry stakeholders to understand the beliefs which underpin our understanding of beauty and wellness and how they intersect.
2. Identify the connections and best practices which already exist, and the work yet to be done, to demonstrate how beauty contributes to the following dimensions of wellness:
  - a. Spiritual
  - b. Intellectual / Mental
  - c. Social
  - d. Emotional
  - e. Physical
  - f. Financial and Occupational

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3. Envision trends “beyond beauty” that will meaningfully contribute to the next generation of well-beauty products and services.
4. Suggest ways to significantly move the dial from the current global perception of beauty to one that is scientifically based and is clearly linked to wellness outcomes.
5. Identify the challenges, obstacles and opportunities in establishing a direct correlation between beauty and wellness.

## SUMMARY OF LONDON BEAUTY MEETS WELLNESS ROUNDTABLE & INTERACTIVE FORUM



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**Round 1 Question:** Do you believe beauty and wellness are connected? If so, what does the intersection look like, today? Where is it headed, and what does the future hold? **Consider all dimensions of wellness – spiritual, intellectual, emotional/mental, social, physical, professional/occupational.**

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**Summary** – the consensus is **today's** connection, when present, looks confused, busy and segmented. One group portrayed the connection as a “minefield of external stuff.” While early adopters started forging the intersection five-ten years ago, two challenges cited in creating pathways between beauty and wellness are:

1. inherent differences in terms – beauty is external and produces immediate results, as opposed to wellness which is seen as internal and a longer-term proposition.
2. monetizing the connection – beauty is a nearly one-trillion dollar, mature industry whereas wellness is not clearly defined, universally understood or seen as a coherent economic driver.

Working towards the connection, is the fact that consumers are becoming savvier about product safety and efficacy, yet a global cognitive association is slow to evolve as industry messaging is difficult to navigate. Authenticity and claims of natural, safe, organic and “free from” are not trusted, and in many instances seen as fake. Regulatory agencies add to the confusion as there is no definitive standard - competing certifying and regulating bodies contribute to both brand and consumer bewilderment.

It was noted by several groups that education and science will play a critical role in creating an authentic connection between beauty and wellness. Advances in technology and social media can be harnessed to provide accurate information and education from a trusted source. Indie brands are doing a better job of connecting with today's consumer and have the potential to lead the revolution.

Most groups concurred there was a circular connection between looking good and feeling good – if I look good, I feel good and if I feel good, I look good. The most important aspect of the look good-



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feel good connection is **confidence**, a positive wellness attribute and viable pathway for creating a connection between beauty and wellness.

## Descriptive Verbatim Comments:

- Indie brands are leading the way in creating authentic, relevant messaging.
- The upper affluent demographic has a better vantage point from which to see the connection between beauty and wellness.
- The selfie phenomenon is redefining the connection in both positive and negative ways.
- Beauty + Wellness is not connected among the masses and not sure the market is sufficient to do so.

The second part of the question was, “where is the connection headed and what does the future hold?” There was a consensus that brands need to be more accountable. Products need to focus on simplicity and be less confusing, more curated and gender neutral. Products in this new “well beauty” category need to integrate with wellness lifestyles. The industry must move from quick fix to daily hygiene and preventive maintenance.

Most groups felt that as beauty and wellness become more integrated the connection will look different - more scientific, and yet the consumer, whose demographic composition is changing before our eyes, must still understand well beauty and find it approachable. Millennials have completely different purchasing triggers than baby boomers. Characteristics of the future connection:

- Demonstrated results
- High tech
- Diagnostic
- Results interpretation – which will require new skills and abilities of technicians
- Personalized
- Individual responsibility
- Products and services which are local, natural, organic, sustainable, real, ethical and have social impact



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- 360-degree wellness with beauty as a potential outcome or integral component
- More egalitarian
- Gender neutral

## Descriptive Verbatim Comments:

- Must define a new 360-degree wellness connection.
- The connection between beauty and wellness will be more holistically-expressed and scientifically-informed.
- The connection between beauty and mental well-being will be better understood.
- Emerging technologies will personalize beauty through diagnostics and access to accurate, relevant information.



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**Round 2 Question:** Do you believe gender, generational, socio-economic, cultural or other influences impact the connection between beauty and wellness? If so, how?

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**Summary** – unlike the New York Roundtable several demographic differences were discussed in detail by multiple groups – sociopolitical, socioeconomic, gender and generational.

**Sociopolitical differences** centered mainly on the differences between the European and US healthcare systems. In Europe, the socialized medicine model, or some variation on the theme, is widely adopted. In the US, the public insurance model is at play. Interestingly, the opinion at the roundtable was that wellness is taken less seriously in Europe than the US because of the differing payor systems. It was thought that Europeans are less incentivized to stay well than citizens of the United States.

The **socioeconomic discussion** mirrored the New York Roundtable, in that access to beauty and wellness are greatly impacted by economics. The connection is easier to see at the top. A difference in Europe, being less homogenous than America, is that disposable – beauty or wellness-allocated income is directly linked to the financial stability of various EU countries.

In terms of **gender differences**, the male experience of beauty and wellness differs greatly from that of females. The volume of comments suggests there is considerable energy around the topic. Constituents felt men are finally coming into their own in terms of comfort and desire to pay attention to their looks. The globalization of fashion is driving the trend. Italian, French and Spanish men seem to be more in tune with their appearance. A major distinction is that women start experimenting with beauty at a very young age and products become part of the female ethos. Men do not have the same enculturation and male role models are only a recent phenomenon. Other differences:

- Men want a quick fix and women enjoy the process.
- Men are more forgiving of their appearance.
- Cultural differences abound in the male grooming category.

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- Men are largely novice consumers and women often are the gatekeepers of male grooming purchases.

**Generationally**, the younger cohorts are connected. In a connected world, trends travel quickly and peer influence is heightened. Boomers are more interested in anti-aging and longevity. Millennials, Gen Z and X are distrusting of large global brands and interested in accessing beauty and wellness through nontraditional means – social experiences, targeted communities and via influencers.

## **Descriptive Verbatim Comments:**

- Beauty is generally more accessible than wellness.
- Diverse cultures have different views of beauty and wellness.
- Men are kinder to themselves.
- Are we living in a middle-class bubble?
- In Asia, the connection between health and beauty is not bonded by income, separation by consumer society.
- Mass availability of food beyond the seasons has changed nutrition and eating habits, and speed of eating and life.
- Seems to be a desire to reconnect with indigenous practices, cultural traditions, herbal medicine and a return to basics.

## **LARGE GROUP:** What patterns are emerging? What is bubbling up?

During the large group debrief, the following themes came to light.

- The connection looks different between men and women. There are huge differences in perceptions and expectations of men versus women.
- Education is required, as there is a higher information demand.
- Awareness varies based on levels of education.
- The mind and mental well-being is the foundation.
- Influencers can be both helpful and harmful.

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- Everything seems to be coming full circle.
- Affordability of beauty and wellness products and services is an issue. Beauty seems more accessible than wellness.
- Socialized medicine versus US system impacts the desire to lead a well life.
- Can it be monetized? Beauty is a bigger business than wellness.
- Social media is changing the speed of information flow and globalization of beauty, fashion and wellness.
- Peer pressure can be harnessed and used as a positive influence,

## Round 3 Four Playground Questions

Round three questions focus on the four Beauty Meets Wellness Playgrounds.

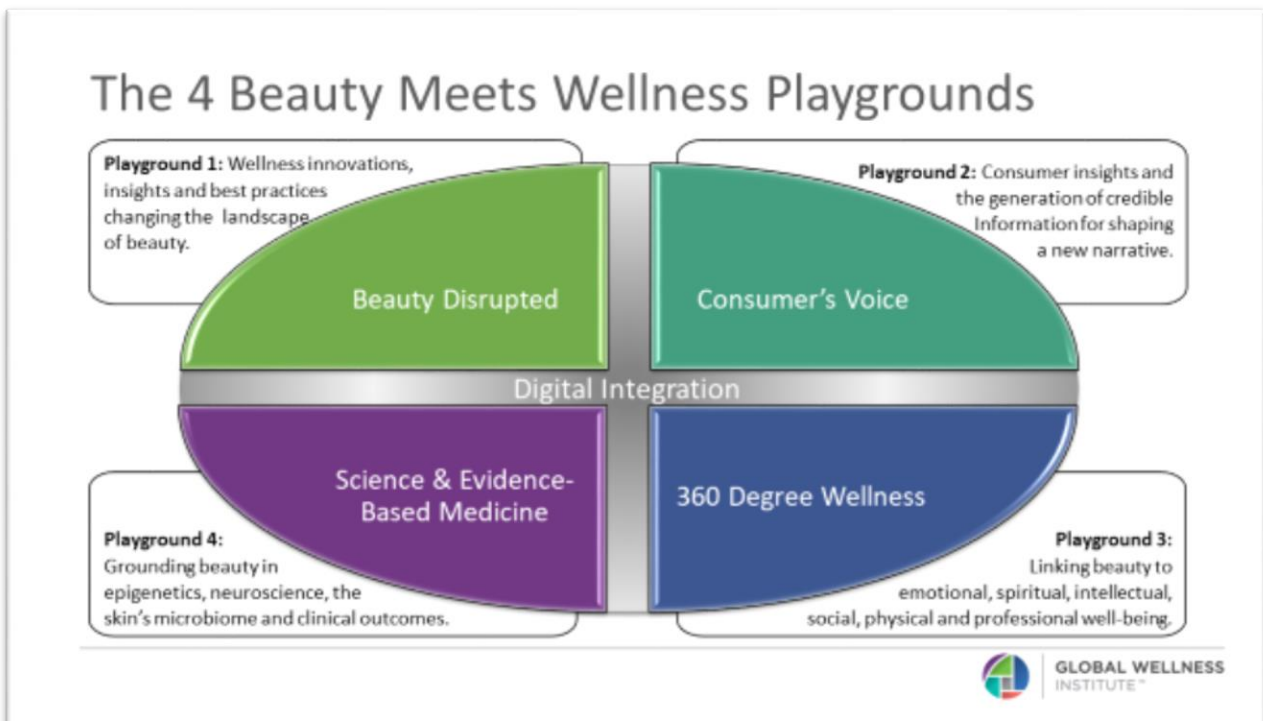


Diagram 1: The Four BMW Playgrounds

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## **PG1: Beauty Disrupted – Two Tables**

Divide your flipchart paper into two columns. What are the hot spots and best practices in products, services and procedures that connect beauty and wellness today? What are the disconnects?

## **PG2: Consumer's Voice**

How do consumers view the connection between beauty and wellness? How important is it that they do and why?

## **PG3: 360-Degree Wellness – Two Tables**

Do you believe there is a dark side to beauty? What are the messages being sent, today? What changes are required to positively position beauty as a key contributor to consumer well-being?

## **PG4: Science & Evidence-Based Medicine**

What scientific and medical advances are accelerating the relationship between beauty and wellness? What is the next frontier, the trends “beyond beauty?”

Summary PG 1 Connecting Themes:	Summary PG 2 Themes:	Summary PG 3 Themes:	Summary PG 4 Themes:
<ul style="list-style-type: none"> <li>The connection to mental health is critical – depression and anxiety are becoming priority health risks, surpassing obesity. How will this influence therapists – more science-based aspects. Cognitive therapists at spas.</li> <li>Supplements - nootropics targeting brain health. Equinox has classes targeting mental agility.</li> <li>More awareness of mental health opportunities – apps like headspace</li> <li>Social media</li> </ul>	<ul style="list-style-type: none"> <li>Confused as to what is beauty and wellness?</li> <li>Everyone is different</li> <li>Influencers and bloggers – more swayed by who is paying the bill than being educated</li> <li>Anti-aging is still the main concern</li> <li>Buying into beauty – not wellness</li> <li>Google is everything and reviews and peer reviews important</li> <li>No connection to long-term voice as press/media is all about what is new</li> <li>Merger of beauty and health editors</li> </ul>	<ul style="list-style-type: none"> <li>Pharmacies making you buy multiple products</li> <li>Toxic ingredients</li> <li>False information creating false expectations</li> <li>Instant gratification – people want results NOW</li> <li>Claims you can make on packaging – “clever marketing.” A little information is not always good</li> <li>Living life “through filters.” Touching up photos. Too much airbrushing and filtering.</li> <li>Media must change</li> <li>Brands influencing a</li> </ul>	<ul style="list-style-type: none"> <li>Skin health – microbiome research used in product development.</li> <li>Wellness for cancer – skin treatments impact on internal health and wellbeing</li> <li>Adapting</li> <li>Emphasis on holistic approach</li> <li>Move to prevention</li> <li>Medical perspective and oversight</li> <li>Beauty is the reflection of internal health</li> <li>We predict increased demand for individualized and personalized</li> </ul>

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Summary PG 1 Connecting Themes:	Summary PG 2 Themes:	Summary PG 3 Themes:	Summary PG 4 Themes:
<p>contributing to low self-esteem</p> <ul style="list-style-type: none"> <li>• Yoga, mindfulness a reaction to this sense of disconnect and loneliness</li> <li>• Success of coffee shops correlated with rise of computer work stations.</li> <li>• In design, more space is being allotted to meditation, yoga, sensory deprivation, wellness spaces and retail.</li> <li>• Workplace wellness</li> <li>• Beauty offerings at the gym</li> <li>• Zeel – massage on demand</li> <li>• Peer influence – people turning away from big brands and listening to their peers</li> <li>• Beauty Board</li> <li>• It was hippie and now it is mainstream</li> <li>• Next: moving retreats into mainstream</li> <li>• Focus on maintenance to prevent breakdown</li> <li>• Retail disrupted – online sales</li> </ul>	<p>may help shape the connection</p>	<p>lot of people. Be transparent and responsible.</p> <ul style="list-style-type: none"> <li>• Make sure influencers are educated</li> <li>• Objectivity – get brands to do things together</li> <li>• Not enough education - expose truth and statements that are myth.</li> <li>• Communities – get involved</li> <li>• Young people using Botox, fillers</li> <li>• Not enough honesty</li> <li>• Money is the root</li> <li>• Influence and educate <b>young</b> people to change the culture</li> <li>• Too focused on external appearance - the dark side has been around for a long time</li> <li>• “Beauty” can make you feel bad about yourself</li> <li>• Test tube science very worrying</li> </ul>	<p>regimens</p> <ul style="list-style-type: none"> <li>• Increased understanding of impact on lifestyle – sleep, food, nutrition</li> </ul>

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Summary PG 1 Connecting Themes:	Summary PG 2 Themes:	Summary PG 3 Themes:	Summary PG 4 Themes:
<ul style="list-style-type: none"> <li>• Self-prescribing – less advice from sales professionals</li> <li>• eLearning – staff and public</li> <li>• Weight watchers for wellness</li> <li>• Korea next? South America?</li> </ul>			

**Round 4 Question:** What steps need to be taken to better align the beauty industry with wellness? What tangible outputs of the Initiative might benefit you or your industry segment most?

**Summary** – several trends emerged in this last large-group discussion of the day:

1. Build trust and develop information that is credible from a reliable source. Grade ingredients and create objective, fact-based knowledge. System of accreditation. Independent database or governing body to set standards, treatments, protocols, products, supplements.
2. Create a movement and change to a positive narrative. Move to a language of well-being and away from anti-everything. Today, beauty preys on insecurity, which is further influenced by peer pressure.
3. Start young and focus on prevention and incorporating positive habits into daily routines. Develop an industry initiative in schools.
4. Connect beauty and mindfulness as a pathway.
5. Beauty box for well beauty brands.
6. New training and education required for therapists.
7. Medical involvement in connecting beauty and wellness.



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## POTENTIAL DELIVERABLES BASED ON ROUNDTABLE AND INTERACTIVE FORUM DIALOGUE

**Summary** – several topics came to light in the large group debrief. The clear messages that came forward were:

1. Create credibility for well beauty by linking to science-based evidence.
2. Develop a coalition of professional small brands interested in creating products and services which bridge beauty and wellness.
3. Develop a credible information and education portal that inspires consumer trust and begins to shift the narrative to stop exploiting the vulnerable.
4. We need to create communities, we are still working in silos in the industry.
5. Clear regulatory guidelines need to be established.
6. Create a link between beauty and mental health and mindfulness.
7. Start YOUNG!



Diagram 2: Industry Sectors & Steering Committee Composition

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**In closing**, we are interested in developing a community around this initiative and to start by populating two committees - solicit additional committee membership (monthly meetings) and establish a Steering Committee (quarterly meetings) to review progress and help guide the Beauty Meets Wellness Initiative.

- a. Invite New York and other Roundtable participants to join the GWI Beauty Meets Wellness (BMW) Committee.
- b. Invite New York and other Roundtable participants to sit on the BMW Steering Committee (representation required in the following areas).

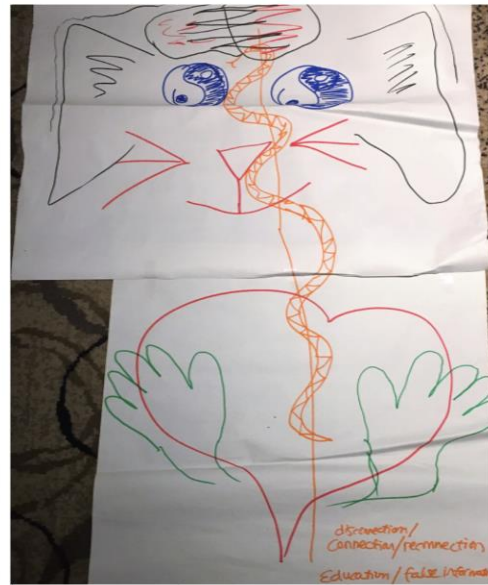
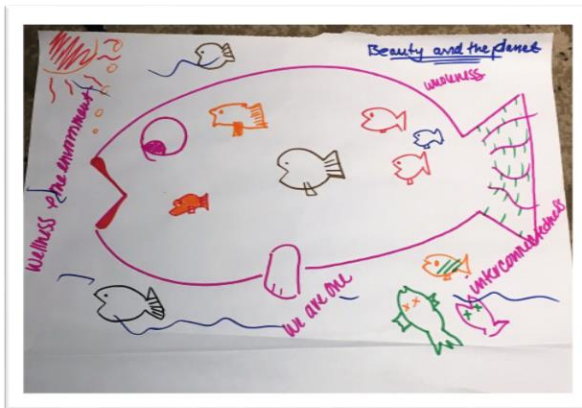
In a final exercise of the day, roundtable participants were asked to work in groups to create a vision for the intersection of beauty and wellness as a combination of animals which represent their ideal world. Much creativity abounded and the pictures reflect the desire of the VIPs to act and create change. Thank you for your generous contribution of time, resources and talent.

**Author:** Mike Bruggeman – Chairman, GWI Beauty Meets Wellness Initiative & CEO & Chief Formulation Office, OM4 Organic Male

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Appendix A: Vision Drawings