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BEYOND THE ROUTINE

Exploring beauty’s new spaces

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The routine is breaking into real life moments – the Beauty spaces

Habits become responsive, modular and shaped by real life

01

FIXED ROUTINE

Morning / evening

02

REAL-LIFE TRIGGER

Context / mood / need

03

MODULAR REPERTOIRE

What works now?

The routine does not disappear. It becomes responsive to life.

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Beauty now starts with four human questions

The occasion—not the category—sets the brief

1

WHAT IS HAPPENING NOW?

Context

2

HOW DO I WANT TO FEEL?

Mood

3

HOW MUCH TIME DO I HAVE?

Time

4

WHAT RESULT DO I NEED?

Outcome

Responsive beauty begins with context

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The same category. A different job

Haircare shifts with the moment

01 WORK MODE

QUICK

Fast styling for readiness.

02 SWEAT + RESET

RESTORE

Wash, condition, recover.

03 NIGHT OUT GLOW

LAYER

Build a fuller, high-impact routine.

moment relevance → problem solved → functional or emotional transition

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When the moment changes, the question changes

A more contextual routine creates a more contextual choice

MOMENT	NEED	QUESTION
WORK MODE	readiness	What will work quickly — and still feel like me?
SWEAT + RESET	restore	What will cleanse and restore without starting over?
NIGHT OUT GLOW	impact	What can I layer for a more visible result?

CONTEXT → NEED → QUESTION → CHOICE

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The need begins in real life

The choice increasingly begins with a question

REAL-LIFE MOMENT

↓

CONTEXTUAL NEED

↓

NATURAL-LANGUAGE QUESTION

↓

AI DECISION SPACE



AI sits between the moment and the shortlist.

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Discovery is compressed into one AI response

AI is the new gatekeeper of choice

82%

of people globally use an AI assistant



ONE SHORTLIST

The strategic question is no longer only:

“Are we visible?”

It is:

For which needs do we appear — with what proof and what reason to choose?

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In Greece, Trust still drives choice

+46%

Demand Power advantage

for the Top-20 most trusted Greek brands vs. the Bottom-20

The fundamentals did not change

Trust, Meaning and Difference still drive choice

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Brands are now judged by two minds

You must be Meaningfully Different in both

THE HUMAN MIND	
Emotion	Feelings, memory, associations
Meaning	Purpose, story, identity
Perception	Trust, credibility, reassurance
Nuance	Category codes, cultural cues

THE MACHINE MIND	
Data	Structured signals, product specs
Reviews	Ratings, sentiment, volumes
Mentions	Presence across trusted sources
Facts	Price, features, comparisons

You can be strong in one mind and invisible in the other. Winning brands are built for both.

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Equity does not transfer automatically to AI

UK facecare brand: market leadership offline, weak visibility in assistant answers

HUMAN MIND

#1 **Demand Power**

Strongest brand in its category

DOES NOT TRANSFER

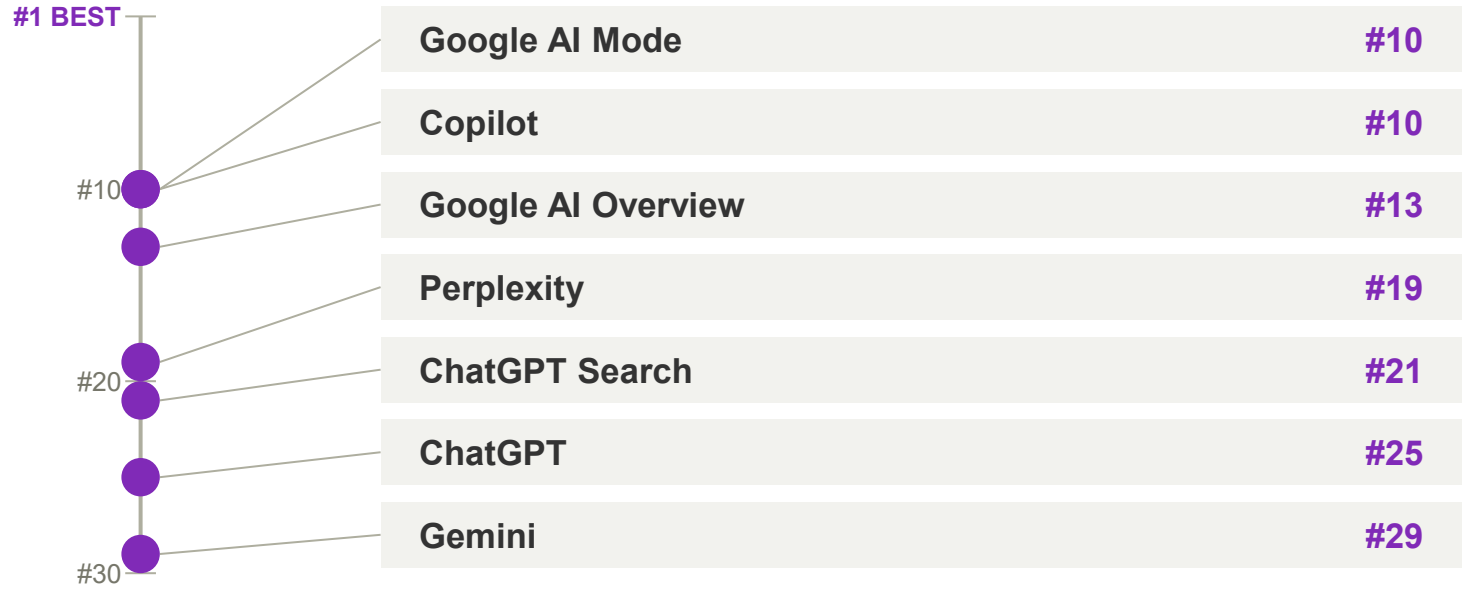
TO THE MACHINE MIND

MACHINE MIND

AI assistant rank

Vertical position is the rank · higher = better

HIGHER ON THE LADDER = BETTER RANK



#1 in people's minds ≠ #1 in AI answers

Source: Kantar BrandDigital AI Signals · Rank position (1 = best)

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AI can narrow the choice. Creators and culture make it lived

AI HELPS ANSWER

“What could work for me?”

CREATORS + CULTURE HELP ANSWER

“What does this look like in real life?”

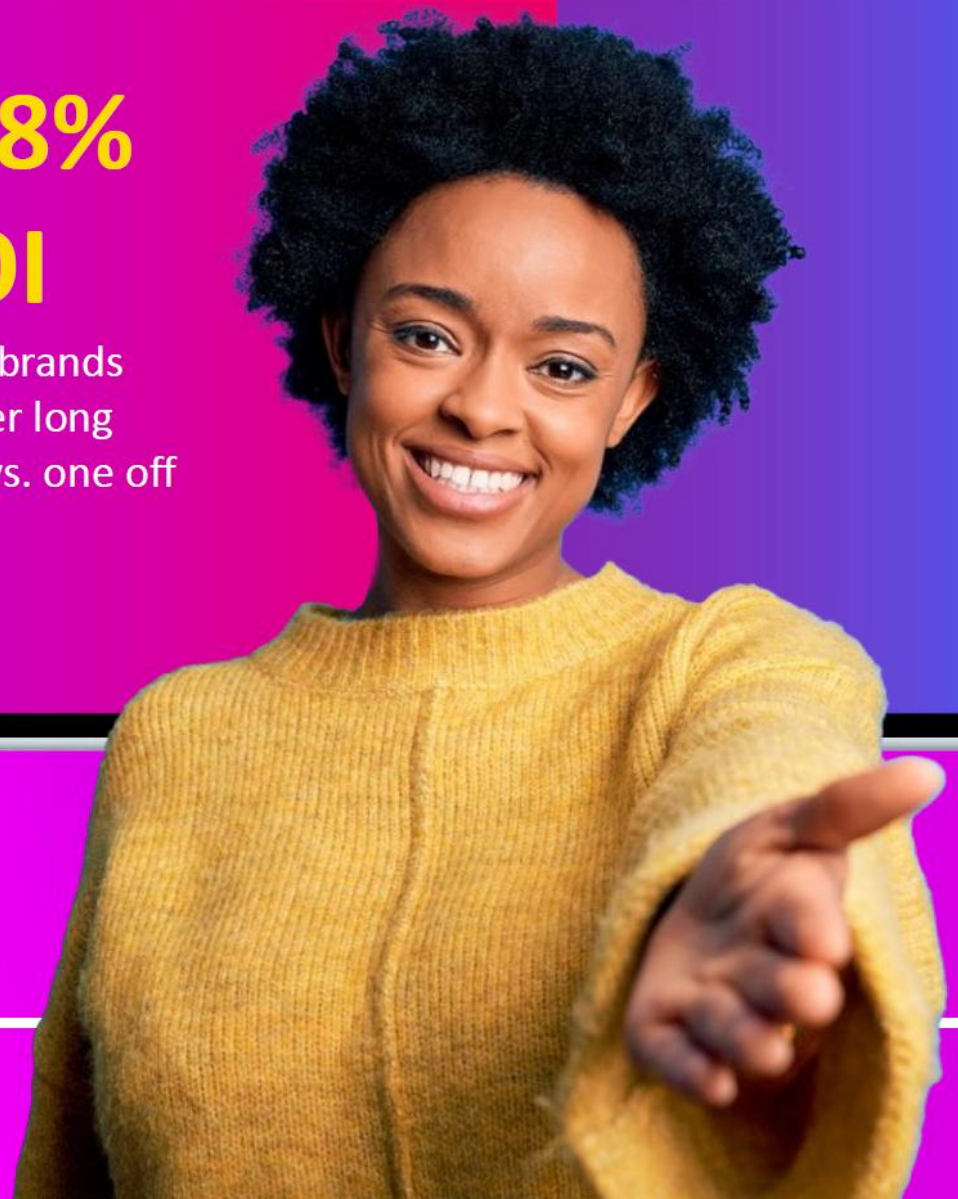
“Who is it for?”

“What might it mean for people like me?”

What people live, review and share becomes evidence for both minds, the Human mind and the Machine mind

3 Connect with *creators differently*

+38%
ROI
when brands partner long term vs. one off



58%
of creators prefer brand guidelines to shape their content**

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Source: *Whalar, **Influencer



Creators hit different

	vs social paid
Saliency	+13%
Brand recall	+19%
Brand consideration	+36%

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Source: Kantar Context Lab

Creators amplify your brand, but can't be your brand

To predispose more people, brands are reaching out for trusted amplifiers like creators and creator/celebrities

A net 61% of marketers plan to increase investment in creators in 2026

Creators can be used for reach, campaign cut-though, always-on moments, or to drive cultural strategy

only

27%

of creator content links to brand

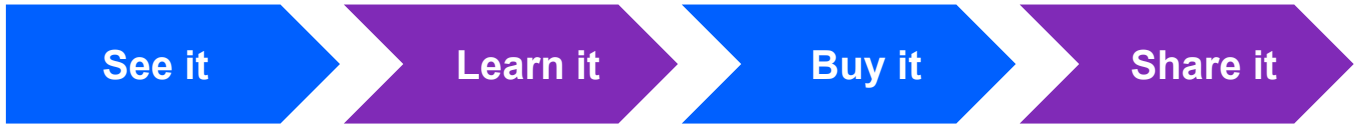
Source: Kantar's Media Reactions, Context Lab

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Creators have turned K-Beauty into a content phenomenon

From Korea to Greece, routines, packs and hauls make the category visible, teachable and shareable.

Make it local — Korean creators bring origin; Greek creators bring it home



86%

of US TikTok users say they learned more about Korea through the platform (76% in Southeast Asia)

“Social media opens the door. Trust closes the sale.”

In Greece, buzz starts the journey; reviews, friends and pharmacists confirm it.

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GLOBAL IMPACT

K-Beauty has moved from trend to global beauty infrastructure

Korea exports more than products: it exports a connected system of culture, content, routines and commerce.

$23.5bn

current K-Beauty spend in 2024 across the US, Indonesia, Thailand and Vietnam

THE ENGINE

1. K-culture halo
2. Digital discovery
3. Fast innovation
4. Content → commerce

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K-Beauty is teaching consumers a new logic of beauty

Its impact is bigger than the brands themselves: it is resetting what modern skincare should feel like.

01 **Culture becomes credibility**
Korea's wider cultural momentum creates a halo of modernity, discipline and progress.

02 **Discovery becomes a benefit**
Constant novelty makes exploration, education and experimentation part of the value.

03 **Gentle efficacy becomes the ideal**
Hydration, barrier health and prevention promise visible results without aggression.

04 **Premium becomes accessible**
Ingredient-led simplicity and strong value replace traditional prestige codes.

05 **The category outruns the brands**
Consumers often buy K-Beauty first and a specific brand second, mixing hero products across brands.

Luxury skincare now has to work twice: on the skin and on the self

Efficacy is the entry ticket. Ritual, personalisation and meaning carry the premium.

FOUR SHIFTS

Proof → Meaning	Results are expected; emotional resonance is what breaks through
Routine → Ritual	Skincare is lived in moments: protect by day, repair by night
Generic → Personal	Precision and diagnostics: the routine must fit my skin
Aggressive → Gentle	Barrier-friendly efficacy feels more sophisticated than intensity

46%

of personal care brands' pricing power now comes from emotional relevance, up from 42% in 2019

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Men are already in skincare. Brands are still talking to women

The behaviour has moved faster than the marketing.

91%

of skincare creative testing is done with women only

THREE REALITIES

The shared shelf	Many men enter skincare through unisex products and whatever is already at home
Young men lead	Men in their twenties are the most likely to choose products made for them
A blind spot	Brands rarely test their communication with the men who are already buying

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Beyond the routine, brands must be chosen in every new space

FIVE TAKEAWAYS

Routine → **Moments**	Design for the moment and the job it does, not only the category
Visible → **Chosen**	Be Meaningfully Different to both the human and the machine mind
Reach → **Meaning**	Brief creators with your meaning and partner for the long term
Trend → **Culture**	K-Beauty proves culture can teach a whole new logic of beauty
Proof → **Care**	In luxury and with men, the premium goes to brands that feel like care

THE QUESTION IS NO LONGER "WHAT IS OUR ROUTINE?"

IT IS "IN WHICH SPACES ARE WE CHOSEN, AND WHY?"

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