



Inside beauty

The intersection of
beauty & wellbeing 2025

ORIFLAME
SWEDEN



Message from our CEO

At Oriflame, we've always believed that beauty is about more than how we look: it's how we feel, how we carry ourselves with confidence and how we support our wellbeing. I have the privilege of regularly meeting people across our global community and one thing always strikes me, whether I'm discussing with an Influencer in India or Beauty Entrepreneur in Poland: beauty is deeply personal, and increasingly, it's being shaped by our emotional and wellbeing needs.

In our first *Oriflame Beauty & Wellbeing Report*, I'm delighted to share insights gathered from 3,500 women across seven different countries, from Nigeria to the UK. They reaffirm what we believe: that confidence, calm and connection are the true benefits of beauty. From the pause a skincare ritual brings to a busy morning, to the mood-lift of a favourite fragrance, or confidence that comes from looking and feeling like your true self – beauty plays an essential role in shaping people's wellbeing.

We've listened carefully to what matters most: feeling emotionally supported, finding simplicity in routines and having access to beauty that's effective, affordable and aligns with one's own values. This report offers a glimpse into those desires and shows how Oriflame is helping to meet them through meaningful products, real community and a shared belief in the power of everyday rituals.

I hope the findings in this report inspire new conversations, new connections and new ideas. Because at Oriflame, we know beauty can do more than transform how we look. It can uplift, empower and connect us... **One beautiful moment at a time.**

A handwritten signature in black ink, appearing to read 'Anna Malmhake'.

Anna Malmhake
CEO & President, Oriflame

Contents

Chapter 1

Emotional wellbeing as the new 'north star' for beauty 4

Chapter 2

The power of ritual 6

Chapter 3

The interconnection of beauty & wellbeing 8

Chapter 4

Breaking barriers: accessing everyday wellbeing 10

Chapter 5

Everyday habits: the building blocks of wellbeing 12

Chapter 6

Beauty as identity and expression 14

Chapter 7

Society vs self: a gap in perceptions 16

Chapter 8

Looking ahead: what the future demands 18

Conclusion

20

Methodology:

Independent research conducted by Toluna on behalf of Oriflame in November / December 2024. The research included 3,500 female consumers, aged between 18 – 75 based in China, India, Mexico, Poland, Turkey, Nigeria and the UK.





Chapter 1

Emotional wellbeing as the new 'north star' for beauty

Beauty should help people feel emotionally uplifted, calm and confident – because feeling good on the outside, starts with feeling good on the inside.

Emotional wellbeing is a rising priority for consumers around the world. This study reveals that respondents feel it's the most influential driver for overall wellbeing, ahead of financial and physical wellbeing. We believe that emotional wellbeing should be the new 'north star' for beauty: moving away from focusing solely on physical transformation, to the emotional value these products bring.

What our survey found

- **Emotional wellbeing** is prioritised by most respondents globally, making it the main driver of overall wellbeing, with physical and financial wellbeing following behind.
- **Feeling calm, refreshed or more positive** are consistently cited as the key mood enhancing benefits within beauty routines.
- **The emotional benefits of looking good** - happiness, positivity, inner peace - have the most significant impact on overall wellbeing.
- **Cultural differences affect how wellbeing is valued**, indicated by emotional wellbeing ranking particularly high in some countries, including Nigeria and Poland.



How different nationalities value beauty and wellbeing



Consumers in Mexico are more satisfied with wellbeing than those globally – with almost two thirds feeling satisfied with their overall wellbeing.



In India, self-confidence is the top beauty descriptor, ranking higher than physical attributes.



China emphasised the importance of product safety and education, with 50% of Chinese women looking for educational content on safe ingredients.



68% of UK consumers think longevity is the most important beauty and health intervention for having a happier & healthier life, versus the global average (55%).



In Poland, a 'well-groomed appearance' and 'looking healthy' remain highly prioritised and valued, by both society and individuals.



In Nigeria, lack of money is overwhelmingly the biggest barrier to not meeting wellbeing needs (58%), versus the global average (38%).



In Turkey, 75% feel that society's beauty standard is more likely to be driven by physical attributes. This is significantly higher than their global counterparts, but lower when compared on a personal level: only 41% of Turkish women are concerned with physical appearance.

"Beauty products can be useful for improving my wellbeing. For example, skincare products help me feel better by keeping my skin healthy. Aromatherapy helps me relax, my favourite soothing scents reduce stress and support my mental peace. Makeup makes me feel more energetic and confident. Hair care also makes me feel good with healthy hair. These products both enhance my appearance and improve my mood."

22 year old respondent, Turkey



Chapter 2

The power of ritual

We believe in celebrating rituals, not just results.

Central to our philosophy is that beauty is experienced in moments: the soothing feel of a lotion, the uplifting scent of a fragrance. These sensory experiences offer more than care; they create emotional pause points – small yet powerful acts that restore, uplift and reconnect us to ourselves amid daily life stresses. Small actions that have big emotional return, providing a positive mood boost.

Understanding this, we see immense value in designing beauty products that engage the senses and elevate routines into rituals – reinforcing our commitment to developing beauty that intentionally supports everyday self-care rituals.

Research found that globally, the highest number of respondents linked the mood-related effects of beauty routines: stating that "looking good" can lead to increased feelings of positivity, refreshment and calm.

Most preferred statements:

- 1 Looking good makes me happy.
- 2 I feel more positive about life when I look my best.
- 3 I feel a sense of inner peace when I look good.
- 4 I feel mentally refreshed after taking care of my appearance.
- 5 I feel more relaxed and less stressed when I take time for self-care.



- **Product efficacy** (how well a product performs) is the #1 contributor to wellbeing, with 56% of all consumers saying results in skincare most benefits their wellbeing.
- **Makeup is the #1 beauty category** to make consumers feel and look more attractive.
- **Hair styling, treatments and makeup** support both physical and emotional wellbeing by enhancing appearance, boosting confidence and enabling self expression..
- **Skincare routines and treatments** are closely linked with feelings of being refreshed, maintaining healthy skin and preserving a youthful appearance. They are central to self-care rituals and daily wellness.
- **Some 38% of respondents** said the ritual of a beauty routine is important.
- **Unsurprisingly, the texture** of makeup and skincare products was found to play an important role in enhancing the senses and feelings of wellbeing.

"When I do my makeup and use cosmetics that bring me joy and relief in the so-called aging process, I have a smile on my face, which makes me happy... youth... the so-called youth of mind."

43 year old respondent, Poland





Chapter 3

The interconnection of beauty & wellbeing

We have always seen beauty and wellbeing as two sides of the same coin. This belief is reinforced by what people tell us around the world: that beauty isn't just about how you look, but how you take care of yourself in mind, body and spirit.

When beauty products support skin health, enhance confidence and align with personal values, they become part of a broader wellbeing routine.

Our research shows that people are looking for beauty experiences that contribute to how they feel emotionally, mentally and physically. It also signals a growing expectation for brands to serve holistic needs.

- **Beauty and wellbeing are intricately connected:** 95% of respondents say they recognise a link between beauty and wellbeing, of those 42% say the link is strong.
- **Among those aged 35-54**, this rises to 46% – the highest of any age group.
- **Fragrance, skincare, haircare, colour cosmetics and wellness routines** are all recognised as supporting both emotional and physical wellbeing.

This suggests that beauty is no longer a separate category from health or selfcare; it's part of a wellbeing ecosystem.

For Oriflame, this validates our commitment to scientifically proven, emotionally resonant products that bridge beauty and wellness – creating products and experiences that deliver both outer results and provide inner support; with messaging that speak to confidence and balance, not just aesthetics.

"After using beauty products to improve their appearance, people tend to feel more confident and content, and this positive attitude can help improve their overall health."

60 year old respondent, China





Chapter 4

Breaking barriers: accessing everyday wellbeing

We understand that even the most empowering beauty experience can be out of reach, when everyday barriers stand in the way. Time, money and choice overload: all are factors on how people access and engage with beauty. This is especially true for those juggling busy schedules, tight budgets or personal skincare challenges.

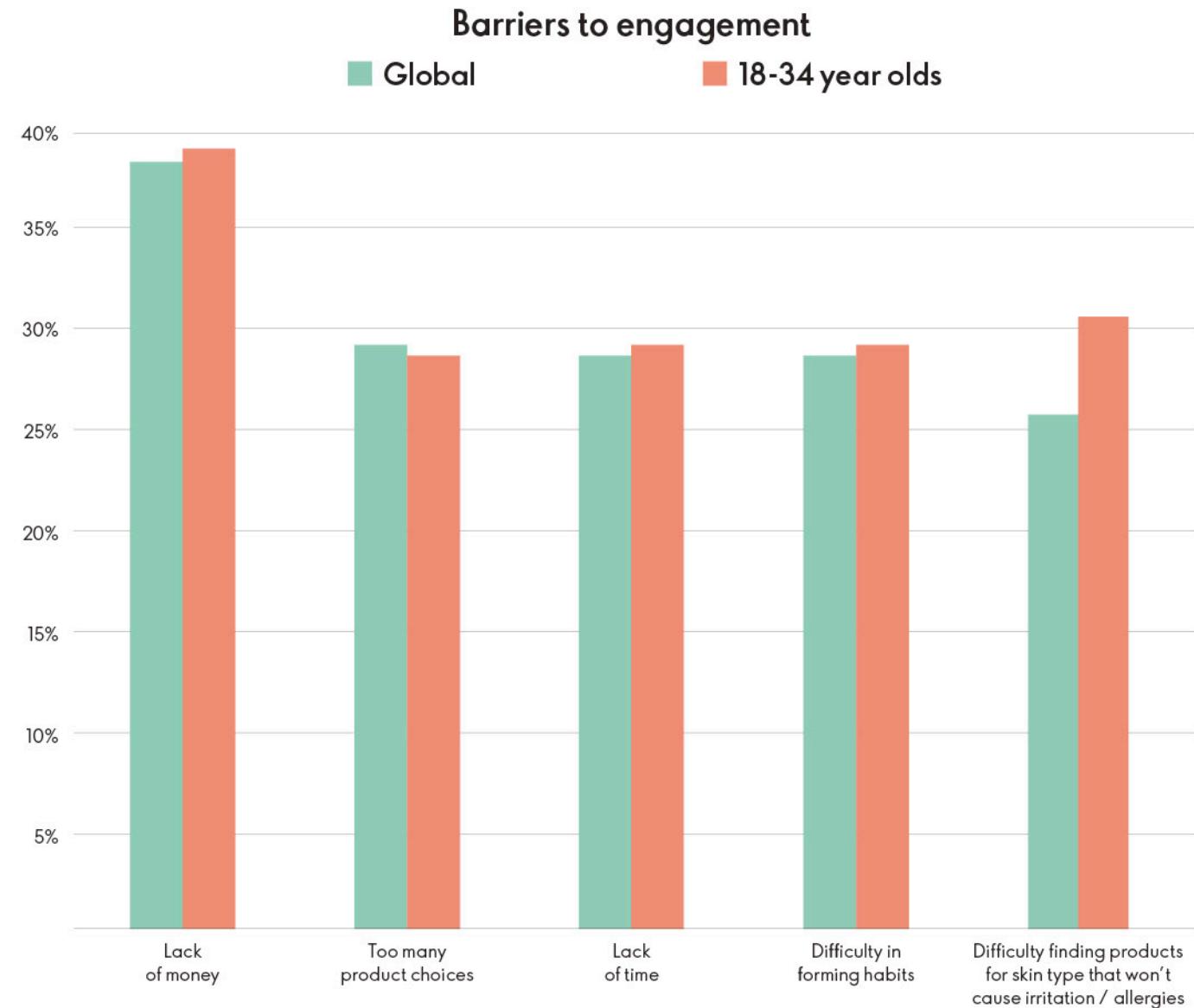
That's why we're committed to making beauty more accessible, more intuitive and more effective for everyday use. Whether it's simplifying routines, offering award-winning products without the prestige price tag, or helping our members discover the right products for their needs – our role is to support our community build wellbeing habits that last.

The research shows that many factors are barriers to maintaining desired beauty routines.

- **38% of consumers** cite financial constraints as a key barrier.
- **29% say they feel overwhelmed** by the number of choices available.
- **28% report that lack of time** prevents them from engaging in regular beauty or self-care habits.
- **Younger audiences**, in particular, face difficulty identifying products suited to their skin type, which can lead to confusion, frustration, or disengagement.
- **Lack of representation or inclusivity in beauty standards** was perceived more of an issue in younger age groups (aged 18-34), versus older groups (65+).
- **34% of 18-34yr** said they struggled with comparison to others, significantly more than other age groups. Whilst “unrealistic beauty standards in media and advertising” have a more significant negative impact to those aged 55+ versus younger audiences.

“Beauty products can enhance your wellbeing by boosting your confidence and gives you courage to look presentable.”

25 year old respondent, Nigeria





Chapter 5

Everyday habits: the building blocks of wellbeing

We believe that small, consistent actions have the power to shape how people feel each day.

When it comes to wellbeing, it's not about dramatic transformation: it's about developing simple, repeatable habits that nurture both body and mind. From morning routines to evening rituals, these micro-moments build confidence and emotional balance over time.

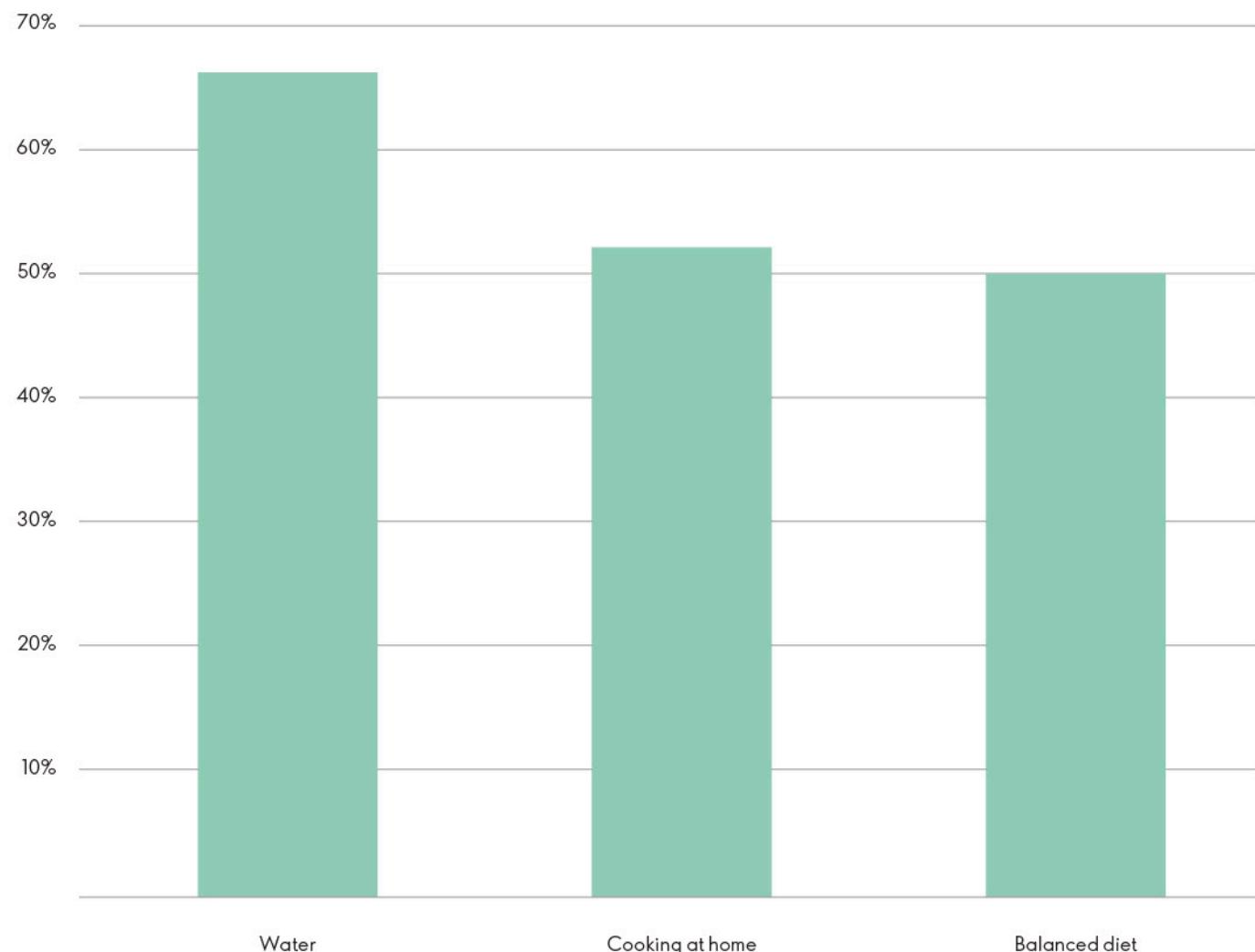
Everyday habits like hydration, cleansing and rest were the most widely valued wellbeing practices in our research.

- **Drinking enough water** is the most cited nutrition-related habit for enhancing wellbeing (67%).
- **Cooking at home (52%) and maintaining a balanced diet (50%)** are also seen as essential daily wellbeing practices.
- **Older adults prioritise cooking at home** with fresh ingredients.
- **Younger people** are more focused on balanced nutrition.
- **Simple skincare routines** (daily cleansing & moisturising) are seen as a key self-care ritual across all age groups.

"Beauty products can be useful for improving my wellbeing. For example, skin care products help me feel better by keeping my skin healthy. My favourite soothing scents reduce stress and support my mental peace. Makeup makes me feel more energetic and confident. Haircare also makes me feel good. These products both enhance my appearance and improve my mood."

22 year old respondent, Turkey

Top daily wellbeing habits





Chapter 6

Beauty as identity and expression

Empowerment has always been at the heart of Oriflame. We understand that beauty is a powerful form of self-expression, enabling people to feel seen, respected and confident in their identity.

This research reveals that beauty is no longer solely associated with appearance: it also plays a meaningful role in how people express their values, heritage, emotions and individuality.

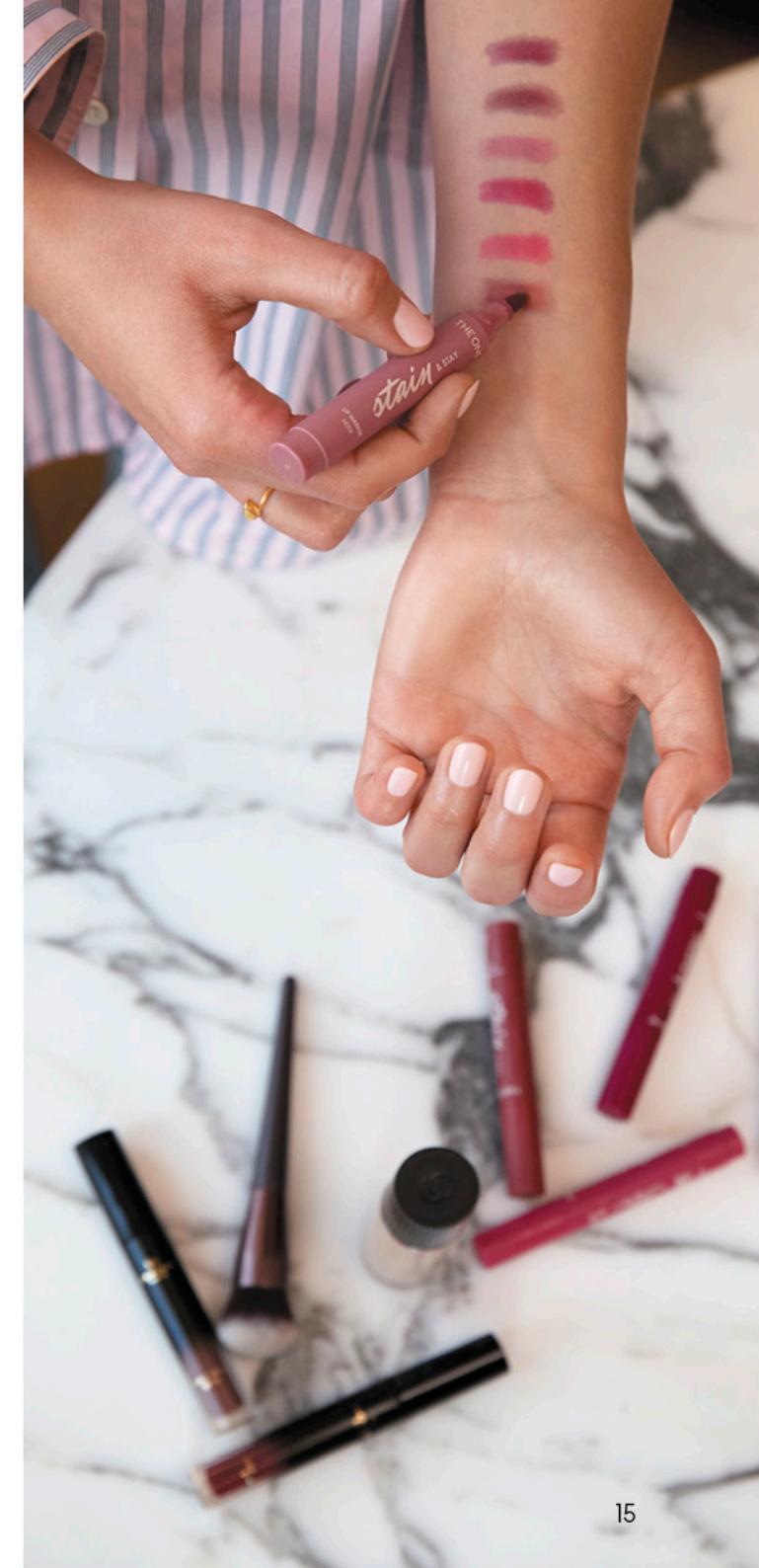
Consumers increasingly use beauty to express their authentic selves in the world, rather than conforming to beauty ideals.

Many consumers also recognise the transformative nature of beauty: with the effects of a routine becoming a tool for self-empowerment and a catalyst for confidence. Beauty practices also serve as a steady anchor-point in their daily lives, prompting feelings of peace and tranquillity – endorsing our reflection that beauty is a meaningful element of self-care.

- **Consumers rank feeling confident in social situations** as more important than being noticed or attractive, reinforcing that beauty is deeply personal and psychological – not just aesthetic.
- **Those aged between 18-34yr** ranked “Feeling attractive” makes them “feel empowered” higher than older groups (35+).
- This group (18-34yr) also **highlighted feeling authentic as a benefit of beauty routines**, above receiving compliments making them feel attractive.
- **Consumers feel physically invigorated from the confidence beauty routines bring them:** *I have more physical energy when I feel confident in my appearance.*
- **Consumers 55+** report that looking good boosts their happiness, positivity and sense of inner peace.

“Beauty products play an important role in my general wellbeing because they give me self-confidence, change my emotions and make me look attractive and empowered, which allows me to feel good with high self-esteem and ready to achieve whatever I set my mind to, both personally and professionally.”

Mexican respondent





Chapter 7

Society vs self: a gap in perceptions

We listen deeply to what people value, not just what the world expects of them.

Our research reveals a crucial disconnect – while consumers perceive that society emphasises external appearance when referencing beauty, people themselves recognise confidence, inner peace and a broader sense of wellbeing.

The divergence between perceived public ideals and personal truth is a significant insight for brands wanting to remain relevant and respectful. Consumers are redefining beauty on their own terms, prioritising authenticity over perfection – and emotion over image. This shift opens up a space for more human, compassionate storytelling, with a greater emphasis on inner qualities like confidence, joy and individuality.

This disconnect stems from a rebalancing of values. People want to *feel* beautiful, not just look beautiful.

Moving away from narrow definitions shaped by media, people are moving towards beauty that aligns with how they live, feel and aspire. This is especially meaningful in our entrepreneurial community, where confidence and authenticity are central to building a business and inspiring others.

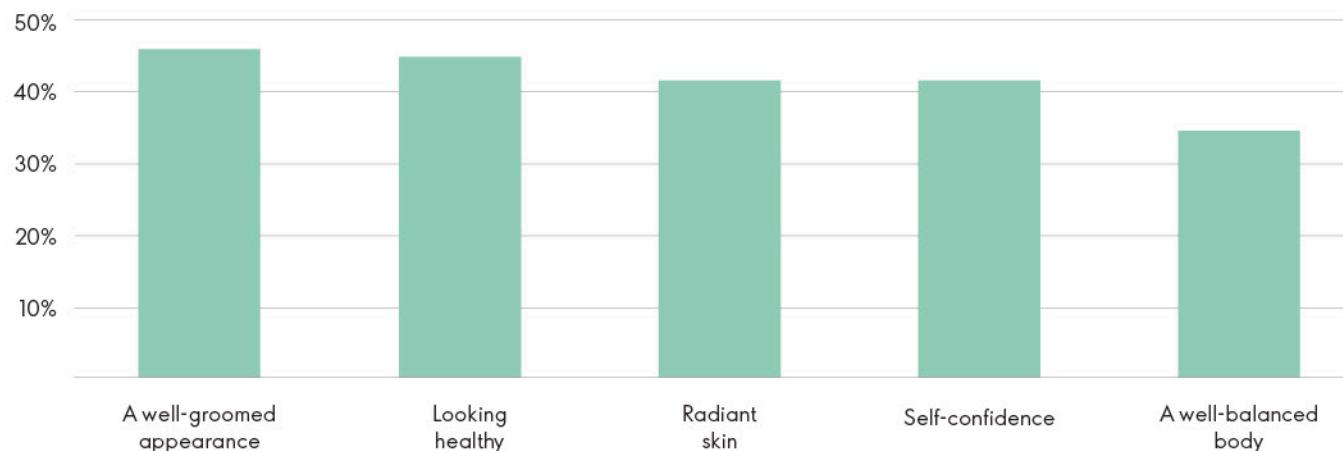
- **71% believe** society overemphasises physical beauty.
- **47% prioritise** self-confidence; 36% prioritise happiness.
- **43% seek** a balance between inner and outer beauty.
- **Only 38% prioritise** a well-groomed appearance, while this jumps to 46% when asked how much they believe society values.
- **'Inner happiness, self-confidence, and self-esteem'** are among the top rated choices for consumers when defining beauty – contrasting society's emphasis on physical appearance. This highlights a shift toward valuing inner qualities over outward looks in how beauty is perceived.

"Beauty is subjective, it's something that makes each person feel good, confident and happy."

28 year old respondent, UK

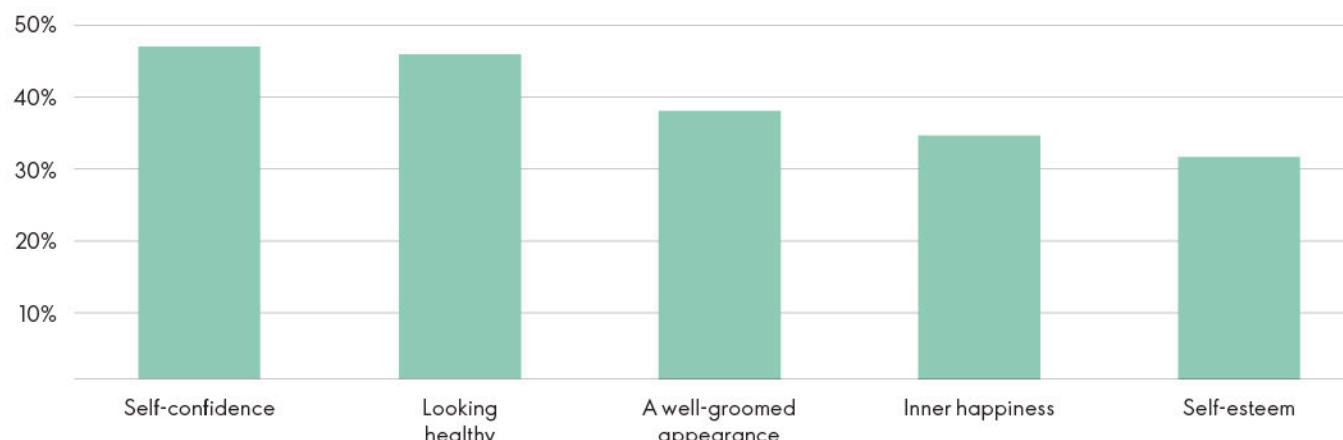
Beauty perceived by society

Base: 3,500



Beauty perceived by oneself

Base: 3,500





Chapter 8

Looking ahead: what the future demands

The future of beauty and wellbeing is about personalisation, precision and purpose. People no longer seek generic solutions; they want products tailored to their needs, biology and lifestyle.

Additionally, there's a growing interest in longevity: how to live not just longer, but with vitality and confidence. This shift marks a major evolution in consumer expectation.

With a majority of consumers selecting both personalised skincare and nutrition as their most desired health interventions, the message is clear: people seek deeper knowledge and more responsive care.

From skin-specific formulations to nutrition plans that support lifestyle goals, the future is individual. At Oriflame, we see this as an opportunity to merge science and nature in new ways, helping people create their own wellbeing pathways.

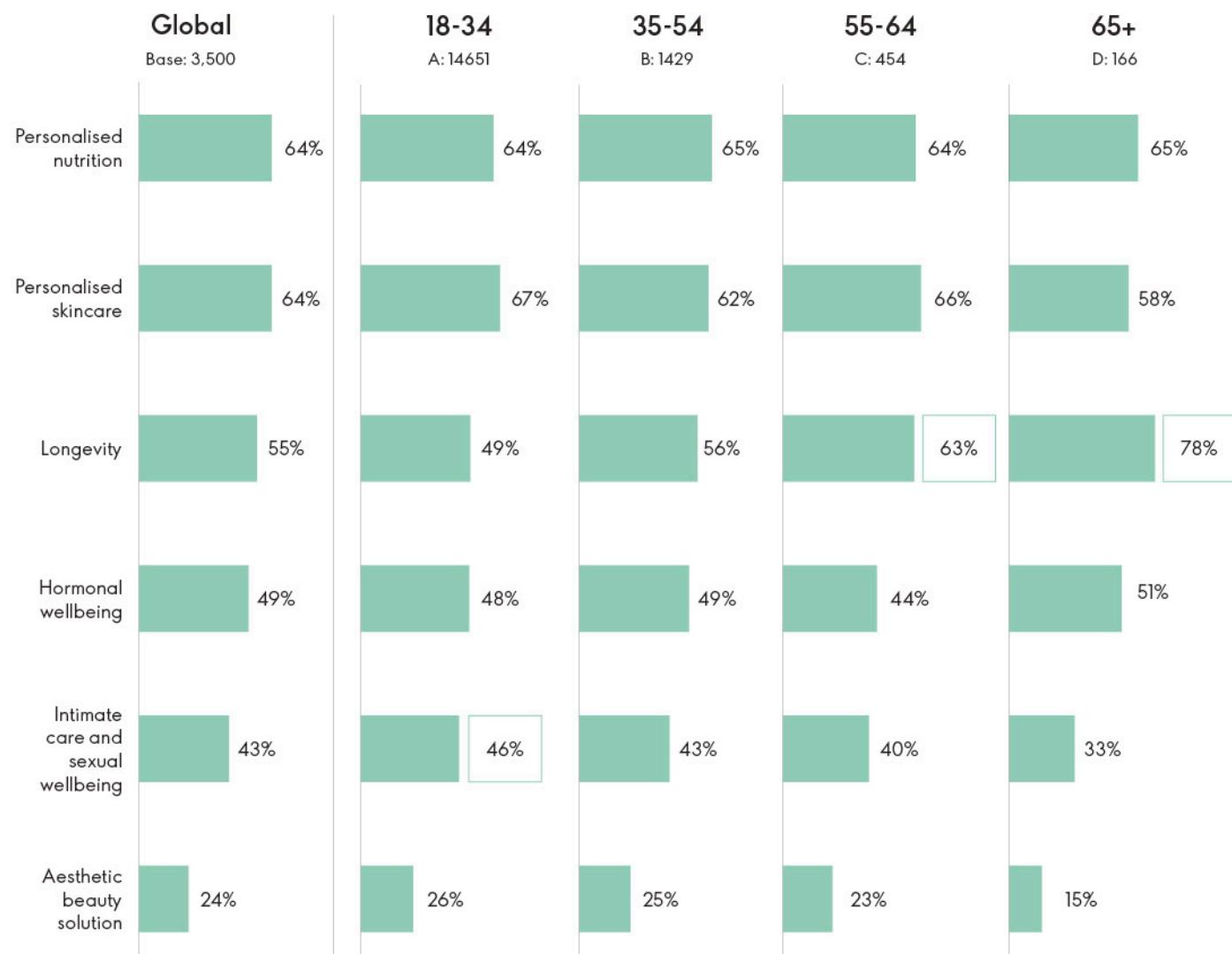
Interestingly, aesthetic beauty – both surgical and non-surgical interventions – was the least favoured choice by respondents across all age groups.

- **64% of respondents across all ages** identify personalised skincare and personalised nutrition as the top health interventions they are interested in.
- **Longevity** is in the top 3 health interventions across all age groups; and unsurprisingly is significantly more of a priority in ages 55+.
- **Aesthetic beauty** – such as Botox and fillers – was the lowest in terms of favourability across all age groups, with just 24% globally. Interestingly, this is more popular or acceptable in China, with 42% of respondents selecting this as an intervention they would seek.

"Beauty products improve self-esteem, we feel more attractive, which makes us happier."

30 year old respondent, Poland

Beauty and health interventions: Top 3



Conclusion

Beauty that connects us

This report confirms what Oriflame has always known: beauty is no longer defined by appearance alone. It's a daily act of self-care. A source of confidence. A moment of calm. And it's deeply emotional, inherently personal and increasingly, a vital part of how people pursue their wellbeing.

From the uplifting power of rituals to the growing demand for personalised care, we've seen that people want beauty that reflects who they are, not just how they look – whether they are a 25yr from Mexico or a retiree from Turkey. They want brands to listen, simplify and deliver solutions that fit into real lives; with integrity and purpose.

At Oriflame, we take this responsibility seriously. We're committed to making beauty accessible, emotionally resonant and grounded in science. Whether it's through our inclusive global community, our trusted products, or the Beauty Entrepreneurs who join us to create their own beauty business; we believe beauty should empower people to feel strong, authentic and in control.

Because when people feel good in their skin – emotionally, physically or socially – it opens the door to something even greater: a sense of self that is grounded, generous and connected to others.

That's the beauty we're here to champion. Every day.

For more information about Oriflame, visit: www.oriflame.com



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