



synthesis Audiences

Unboxing Men

**Masculinity in crisis: how
are brands reshaping their
relationship with **men**.**



LETTER FROM OUR DATA SCIENTIST

At Synthesis, we believe people don't exist in a vacuum. The strongest brands understand their consumers' interests and passions — beyond category limitations.

That's why we dig into audiences via mapping millions of Open Data connections. By contextualizing audiences in their wider world, we offer our clients a more holistic view.

Synthesis segmentations deliver the usual granularity of demos, sizing and brand affinity, but they also give a data-driven view of consumers beyond your category. What music do they love, where do they hangout, what media do they consume? Our clients use this to prioritize growth, plan media and partnerships with confidence.

As a Data Scientist, I'm passionate about using network theory and mathematics to bring structure to complex, messy data. The way we do this at Synthesis is special. I like to think it shows in the work we do.

Luc
Lead Data
Scientist

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WHY MENS BEAUTY?

From fashion, beauty to booze, a question we hear a lot from our clients is how can they better engage their growth audiences? And, in a world where references to gender can be incendiary, how should brands market to men?

Men's Beauty is an ideal way to unpick this subject. Known within the industry as a huge opportunity for growth, it is often caught up in a one-dimensional view of its target audience. After all, what does masculinity even mean?

This report is where we netted out. We'll show you how Open Data is uniquely positioned to paint a rich picture so you can *feel* the humans behind the data. It will build empathy, get your teams excited about planning long term growth and inspire more resonant communication.

We're excited to share this report with you. I hope you enjoy reading it as much as we did writing it.

The Synthesis
Audiences Team
Harriet, Luc,
Jon, Nathalia,
and Don.



Welcome fluid masculinities — come as you are.

Our understanding of gender and masculinity is evolving fast. This brings new freedoms to express and greater inclusivity. However, with choice comes complexity. A cursory look at [media headlines](#) and social media feeds presents contradictory views on what it is to be a successful man.

Today strong-man archetypes and soft masculinity rise concurrently in pop culture. Men face polarizing directions — Scott Galloway or Joe Rogan? BTS Jimin or Code Kunst?

Must men pick a tribe?

MASCULINITY...

...IN CRISIS?

Move over Marlboro Man and charismatic Sungil Shin-types.

A rugged chiseled jaw, physical prowess and charming smile is no longer the standard for a successful man. The days of a single, unifying masculine ideal are gone.

Economic and social shifts have eroded the historical preference for men and disrupted traditional identities. Modern post-industrial economies favor creative thinking, emotional intelligence, communication and relationships skills, not physical strength.

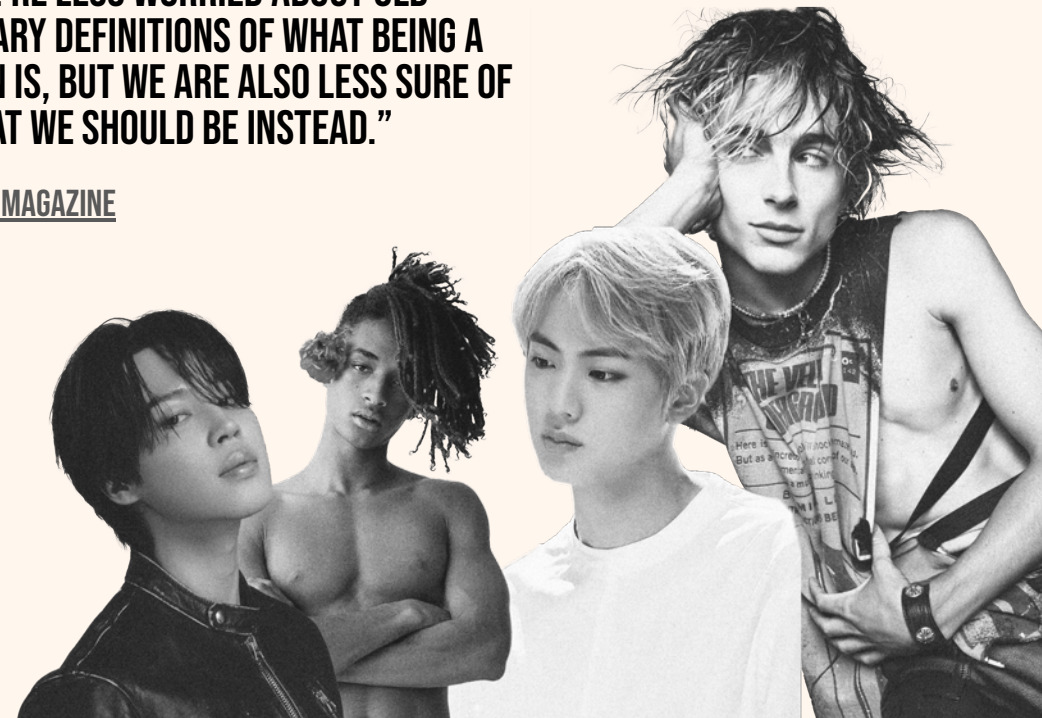
Since 1970's the number of women in workforce and education has risen dramatically. [IMF](#) reports indicate the greater the power of women, the greater a country's economic success. Meanwhile, men are not thriving. Almost everywhere, men suffer more from addiction, suicide and have lower life expectancies than women.

IMAGE SOURCE: IMDb, Jeff Bottari via Getty Images, Los Angeles Time, Instagram @chrishemsworth, Instagram @c.syresmith, British Vogue, Bighit Music

3 —SYNTHESIS AUDIENCES: UNBOXING MEN

“WE’RE LESS WORRIED ABOUT OLD BINARY DEFINITIONS OF WHAT BEING A MAN IS, BUT WE ARE ALSO LESS SURE OF WHAT WE SHOULD BE INSTEAD.”

— GQ MAGAZINE



IN A WORLD OF MULTIPLE VERSIONS OF *Masculinity* BRANDS ARE STRUGGLING TO AUTHENTICALLY CONNECT.



Clashing visions of what it is to be a man offer a challenge and opportunity for brands.

With nearly half of Gen Z consumers stating they value brands that don't classify items as male or female, it is not surprising that inclusive and gender-neutral brands such as Telfar and retail experiences such as Nike Style in Hongdae, Korea are resonating.

From Axe to Chanel, brands are broadening the way they depict men in order to stay relevant to the evolving cultural conversation. Those that don't engage meaningfully, or worse, those that continue to market towards outdated personas and gender stereotypes will be left behind.

Egyptian men kicked off the trend for cat eyeliner in ~4000 BC. Yet in our living memory, skincare and makeup has traded heavily in gender tropes and promoted beauty as a feminized space.

The biggest brands in the category focus almost exclusively on women — their skin needs, aspirations and concerns. They allocate a fraction of attention, R&D and marketing spend to men.

NOWHERE IS THIS MORE **EVIDENT** THAN IN BEAUTY.

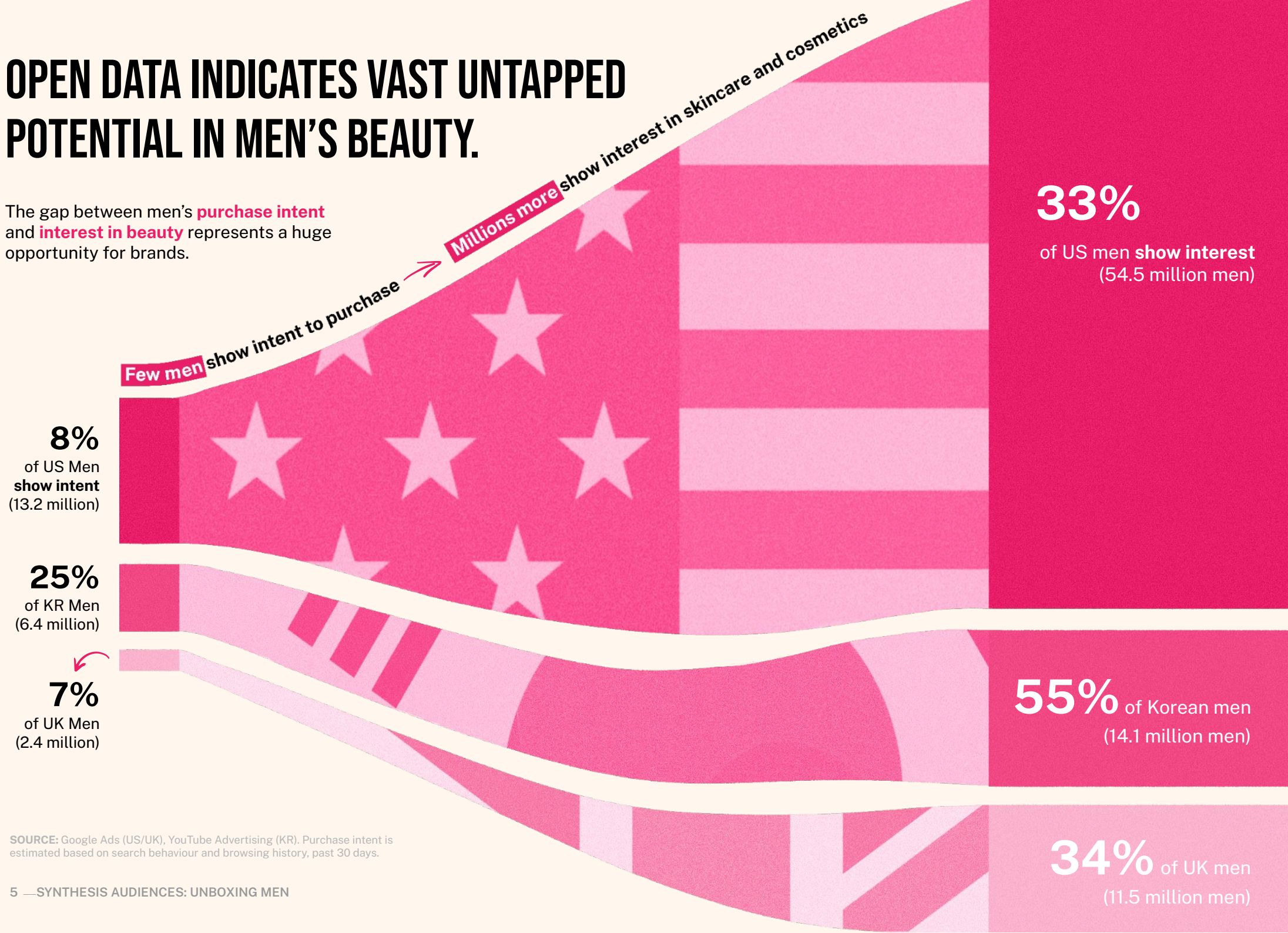
Women's beauty is hyper competitive with innovative propositions catering for a wide range of beauty ideals. By contrast, the men's aisle can lack sophistication and diversity, especially in the US and UK where outdated, strongman archetypes persist. Cue macho semiotics — black, navy, chrome **SHOUTING IN CAPS** — used to signal traditional masculine attribute of physical strength, functional efficacy, conquest and power.

Yet times are changing. Research shows that younger consumers favor brands with broad and inclusive representation, not singular or stereotyped ideals.

Major beauty groups risk losing ground to local, nimble upstarts that promote positive, diverse expressions of manhood. Brands like B.Ready and hims are disrupting with their refreshing tone, new business models and personalized men-first solutions.

OPEN DATA INDICATES VAST UNTAPPED POTENTIAL IN MEN'S BEAUTY.

The gap between men's **purchase intent** and **interest in beauty** represents a huge opportunity for brands.



SOURCE: Google Ads (US/UK), YouTube Advertising (KR). Purchase intent is estimated based on search behaviour and browsing history, past 30 days.

THE GROOM BOOM

As the *rules* of gender presentation become more flexible, any remaining stigma around men's skincare is evaporating.

In Asian markets like Korea, China or Japan, men's skincare and makeup is already mainstream. In the US and UK, an explosion of new direct-to-consumer brands have shaken up the category. Makeup is creeping into men's everyday routines — a little concealer on a blemish here, a little brow gel there.



MASCULINITY AND THE
BEAUTY CATEGORY ARE ON
THE PRECIPICE OF CHANGE.

What's the Unlock?



THE GUYS,
THE FASHIONISTAS,
THE KCONMINAM FLOWER
BOYS,
THE BEAST IDOL BOYS,
THE BROS, THE BLOKES
& THE GENTLEMEN...

BEYOND THE *Monolith*
MEET THE MEN ENGAGING
WITH BEAUTY IN KOREA,
US AND UK...

Show me my next growth audience →

MEET THE 14.1 MILLION MEN IN KOREA WHO SHOW INTEREST IN BEAUTY

SOURCE: YouTube Advertising Data (KR), past 30 days.
IMAGE SOURCE: Pinterest @bonsoo_, Instagram @leehk.k,
Pinterest @not_so_extrovert



Bright youthful skin, big eyes, double lids, a defined nose, plump lips, a tall, muscular yet androgynous body... Korean beauty standards for men are high.

Investing in one's appearance is not only expected but necessary to compete. These social pressures have made Korea one of the largest beauty markets — estimated at [South Korean ₩ 7.64 trillion](#) in 2021 (US \$5.8 billion).

**THREE QUARTERS OF SOUTH KOREAN MEN UNDERTAKE A
BEAUTY OR GROOMING TREATMENT AT LEAST ONCE A WEEK.**
GLOBALDATA

The pursuit of a flawless complexion has become the norm. K-pop idols with their bold brows and perfect skin have propelled men's makeup into the mainstream. Korean influencers share routines, reviews, and tutorials, encouraging men to explore, play with their look and ultimately redefining the boundaries of modern masculinity.

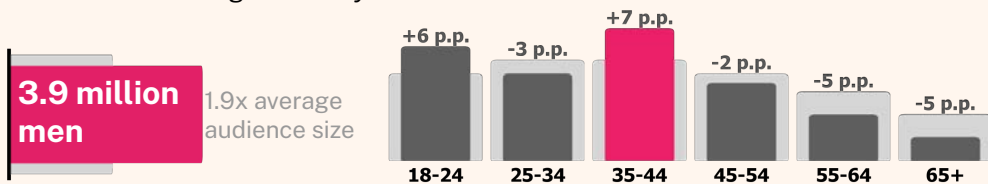


MEDIUM BEAUTY AFFINITY

Straightforward Optimists.

Largest audience in Korea.

Over indexes amongst 35-44 year olds.



Lively, cheerful and outgoing, you'll never have a bad day around Straightforward Optimists. They focus on the bright, hopeful aspects of life against all adversity.

Their family and close friends are priority number one, always looking forward to creating meaningful memories with them. Striving to live a healthy life amid city pressures, Straightforward Optimists have active, outdoorsy lifestyles.

When not outside on a hike, self-care and wellness manifests through their skin care. They are drawn to well-known, affordable Korean drugstore brands like [Dr. G](#), [Innisfree](#) and [Espoir](#).

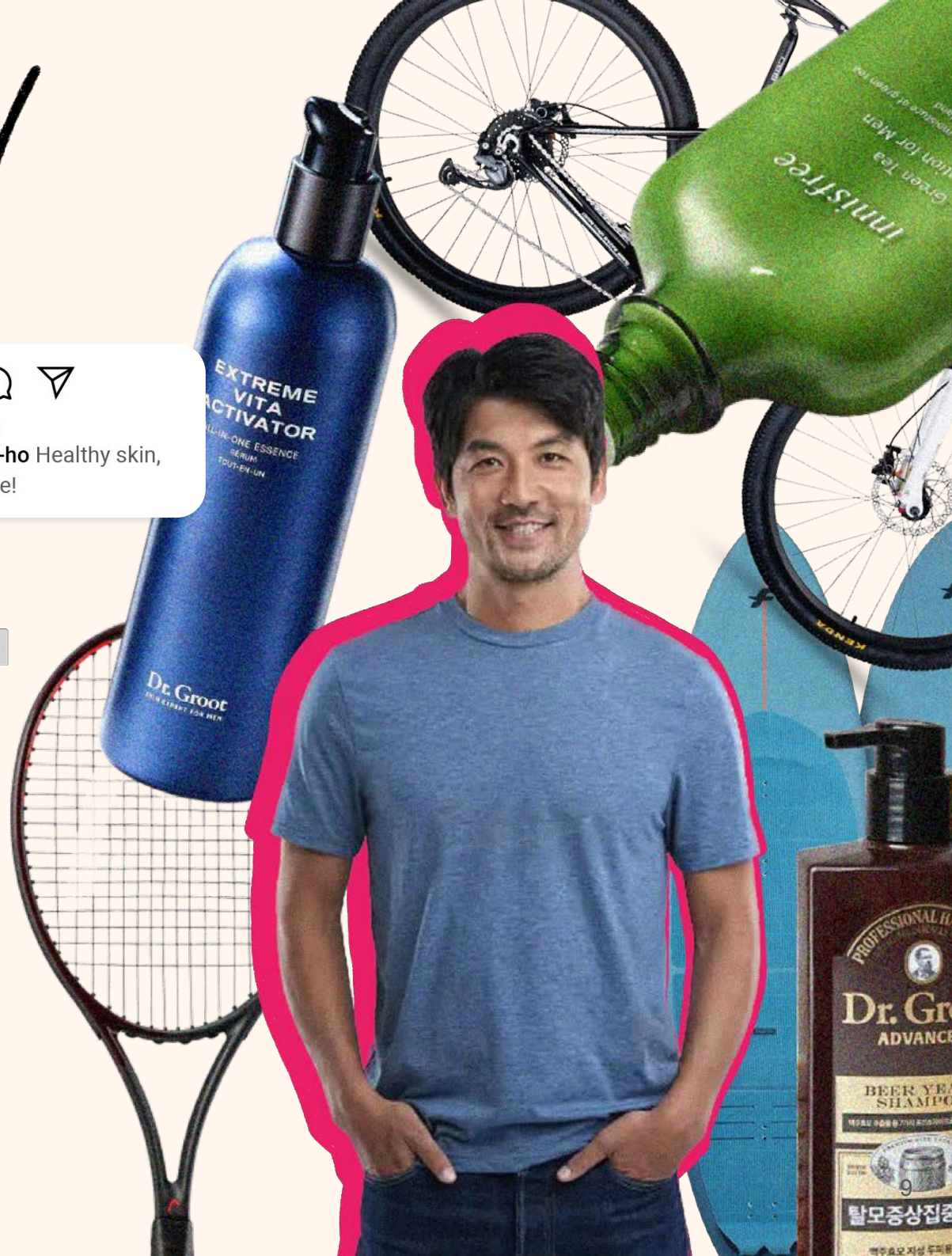
BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

DATA SOURCE: YouTube advertising data (KR). Size indexed vs. average across segments. Age over-skew versus base population highlighted in pink.



25 Likes

Kim Min-ho Healthy skin,
happy life!





34 Likes

Park Jun-seo A well curated look is stronger than 1000 words.

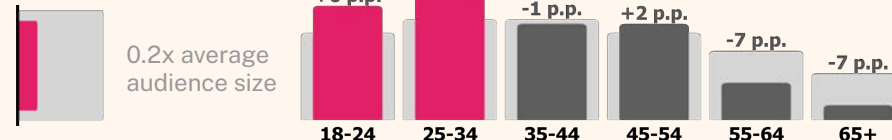
HIGH BEAUTY AFFINITY

Thoughtful Jetsetters.

Smallest audience in Korea.

Over indexes amongst 18-24 year olds, and 25-34 year olds.

0.5 million men



Luxe-inclined and detail-oriented, Thoughtful Jetsetters spend copious amounts of time curating their style and personal statement.

Their social media profiles showcase color-themed and symmetrical posts, where each smile, garment, place, or product is intentional. This keen attention to detail naturally cultivates cultural curiosity, prompting them to continually seek new experiences to expand their horizons.

Appearing polished and well-presented is a priority. Well-versed in the world of skincare and cosmetics, Thoughtful Jetsetters prefer brands with clean lines, pharma cues and detail on active ingredients like [CNP Laboratory](#) and [Abib](#).

BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

DATA SOURCE: YouTube advertising data (KR). Size indexed vs. average across segments. age over-skew versus base population highlighted in pink.

Artsy
K-Poppers
→

3.1 million men.
2nd largest audience.
High Affinity to Beauty



Fashion
Buffs
→

1.9 million men.
3rd largest audience.
High Affinity to Beauty



Unfiltered
Youth
→

1.6 million men.
4th largest audience.
High Affinity to Beauty



Tenacious
Professionals
↪

1.6 million men.
4th largest audience.
Medium Affinity to Beauty



Playful and curious, **Artsy K-Poppers** dance their way through life. Always surrounded by a community of like-minded people, they seek cultural experiences in food, music, film and design.

K-pop is their entry point into skincare and makeup. They gravitate towards brands with connections to the scene.

Fashion Buffs have their finger on the pulse; these guys know what's trending. Sharing insider tips gets their name known. Buff body and confident style, they proudly assert their status.

Designer brands and drugstore classics meet their beauty needs. Makeup, fragrance, skincare and injectables all feature.

The youngest of the bunch, **Unfiltered Youth** value authenticity over staged perfection. These guys live in the present and take each day as it comes. Refusing to take life too seriously, they live by their motto: 노력 없이, 스트레스 없이 (no effort, no stress).

Minimalist packaging, pharma and clean beauty brands connect with their desire for a fuss free life and effortless clean look.

Tenacious Professionals draw inspiration from their heroes. Embodying a growth mindset, they embrace challenges and learning opportunities. These men are pragmatic, work-driven and avid team players.

They have a pragmatic relationship with beauty. Amidst a volatile economy, looking presentable helps them keep up with the competition.

MEET THE 66 MILLION MEN IN THE US & UK THAT SHOW INTEREST IN BEAUTY

SOURCE: Google advertising data (US/UK), past 30 days.

IMAGE SOURCE: Zara man via fashionisto, Pinterest

Though K-Beauty has catered to men for decades, the West has been late to the party. Video conferencing is the new battleground of success, accelerating men's relationship with their appearance. Men are confronted and judged based on their looks more than ever before.

Social media brings pressure, but also anonymous avenues to explore, learn and buy beauty products.

"TIKTOK HAS CREATED A WEALTH OF BEAUTY CONTENT, INCLUDING TIPS AND TUTORIALS ON SKIN CARE, HAIR CARE AND GROOMING. THE EASE OF ACCESS TO THIS INFORMATION HAS MADE IT AVAILABLE TO MEN FOR THE FIRST TIME".
@DERMDOCTOR, A SKINFLUENCER WITH 17.9 MILLION FOLLOWERS

Hard hitting, muscular physiques pioneered by Arnie in the 1980s remain relevant for some; but evolving gender norms are allowing young men to choose individuality and authenticity over perfection.

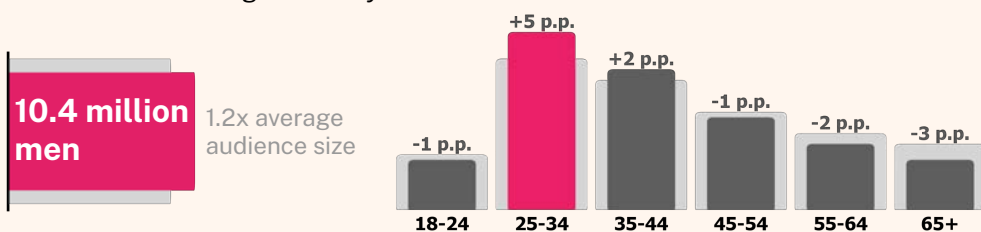


MEDIUM BEAUTY AFFINITY

Athletic Mavericks

2nd largest audience in US & UK.

Over indexes amongst 25-34 year olds.



These lone wolves trust no-one but themselves. Whether at work or at the gym, Athletic Mavericks stop at nothing to get the results they want. Validation serves as the foundation of their motivation; they have no issue coming off as braggy or cocky. For them, every accomplishment is a step closer to emulating their idols — train by day, Joe Rogan by night baby.

Despite their self confidence, when it comes to beauty, they still seek the permission and reassurance of hard-man codes. Functional claims. Black, gunmetal and chrome semiotics. Traditionally masculine ingredients like Charcoal, Bourbon and Tobacco notes. Brands like [Manscaped](#), [Jack Henry](#) and [18.21 Man Made](#) sit top on their shelf.

BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

DATA SOURCE: Google ads data (US & UK). size indexed vs. average across segments. Age over-skew versus base population highlighted in pink.



32 Likes
Alexander Thompson I may not be the prettiest mofo in the gym, but I do bust my ass.





MEDIUM BEAUTY AFFINITY

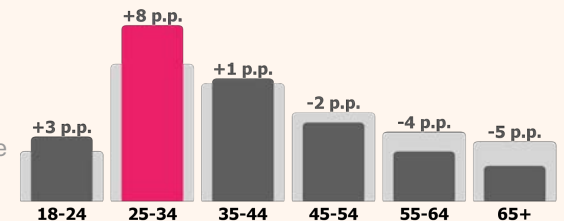
Sharply Styled Creators.

5th largest audience in US & UK.

Over indexes amongst 25-34 year olds.

9.6 million men

1.1x average audience size



Writers, musicians and photographers by profession, Sharply Styled Creators blend their intellectual curiosity and creativity with their love for community. These men value representation and purposeful engagement. Catch them sporting a 'Support Local' tote bag and using products from Black-owned brands... because for them, the story always matters.

They don't shy away from grooming and skincare to achieve a clean, sleek look. While traditional men's brands have typically met their needs, a new generation of men's skincare and cosmetics have captured their attention. Think [Scotch Porter](#), [Shakeup Cosmetics](#), [Wolf Projects](#). Brands by men, for men — all men.

BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

DATA SOURCE: Google ads data (US & UK). Size indexed vs. average across segments. Age over-skew versus base population highlighted in pink.

Luxe Fashionistas



12.8 million men.
Largest audience.
High Affinity to Beauty

Classic Connoisseurs



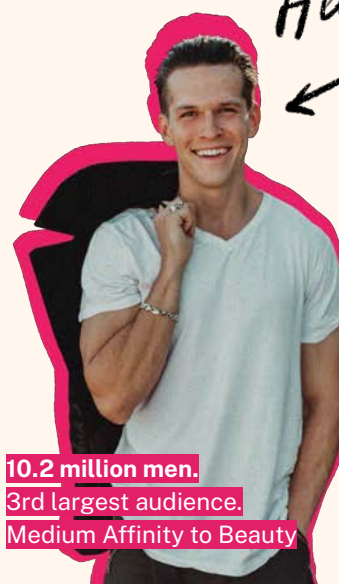
10.0 million men.
4th largest audience.
Medium Affinity to Beauty

Beauty Allies



8.9 million men.
6th largest audience.
High Affinity to Beauty

Everyday Heroes



10.2 million men.
3rd largest audience.
Medium Affinity to Beauty

Rugged Adventurers



1.6 million men.
Smallest audience.
Medium Affinity to Beauty

THE BEAUTY INCLINED

Good taste and sophistication is a common trait for these audiences.

Luxe Fashionistas carefully curate each of their outfits. Find them flicking through a copy of Architectural Digest or Kinfolk. **Classic Connoisseurs** extend their refined taste to wine, watches and sports cars.

For **Beauty Allies**, authenticity and self expression take center stage—these men wear their hearts on their sleeves.

When it comes to fragrance, skincare and makeup, all three of these audiences pamper themselves with the occasional luxe brand that speaks to their lifestyle aspirations.

THE BEAUTY CURIOUS

These men embody more ‘traditional’ masculine ideals.

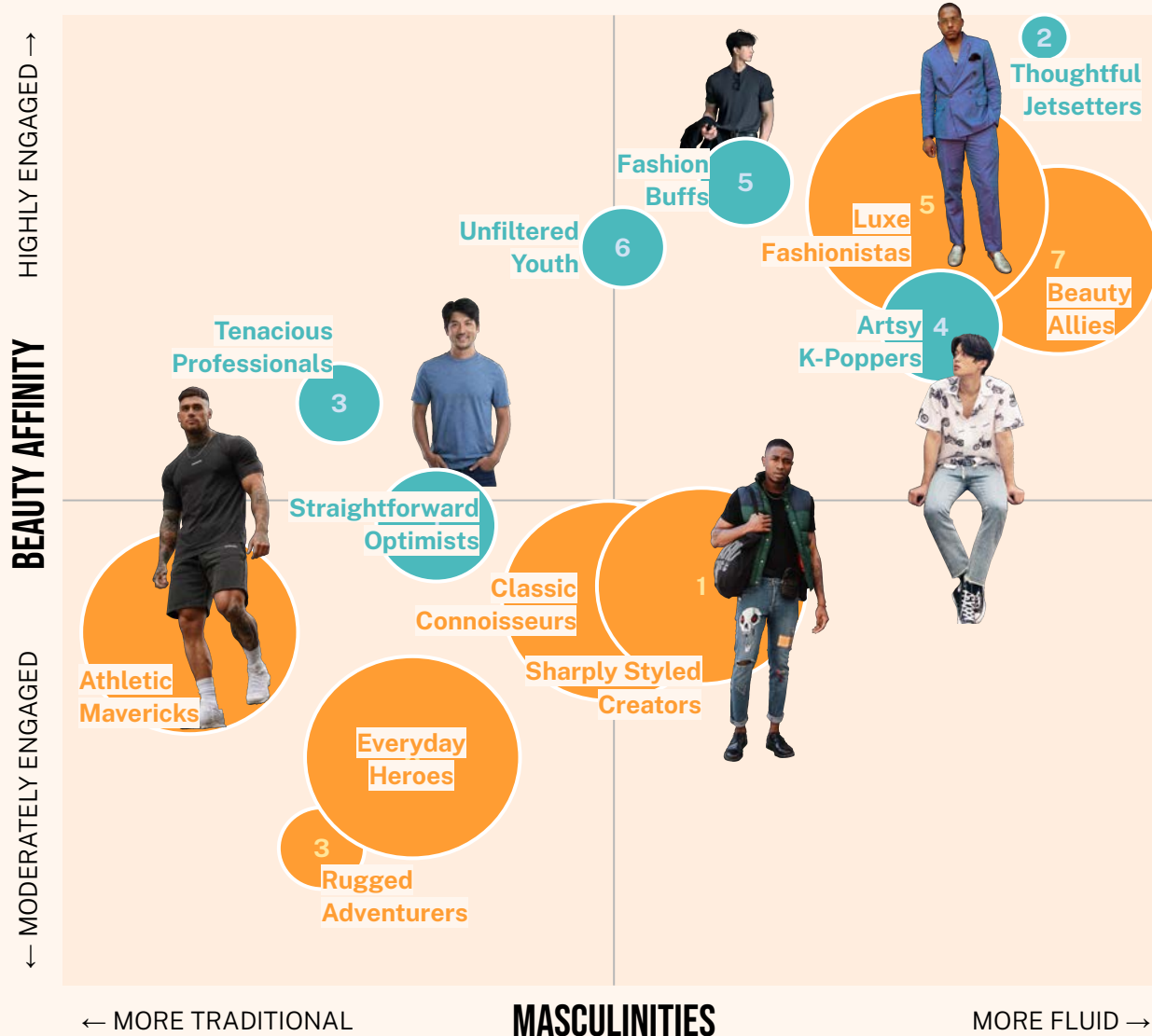
Everyday Heroes are young and optimistic. They relish the thrill of adventure shared with close friends — live football or the latest Marvel movie.

When it comes to skincare they keep it simple with drugstore brands that get the job done.

Rugged Adventurers strive for self-improvement and growth. From leisurely bike rides to lung-busting mountain hikes, these men enjoy challenging themselves and exploring the vastness of Mother Nature.

Grooming is their entryway to beauty. They gravitate to brands with natural ingredients.

WHERE DO OUR AUDIENCES SIT?



ALL OUR AUDIENCES ARE BEAUTY ENGAGED

The highest beauty affinity correlates with more fluid masculine ideals. Reflecting their confidence to express and curate their look, audiences like **Fashion Buffs** and **Luxe Fashionistas** engage across fragrance, skincare and some color cosmetics.

For audiences with more traditional ideals, grooming, fragrance and basic skincare are their ways in. **Tenacious Professionals** approach self-care like other aspects of self-improvement in their lives. Gym-going **Athletic Mavericks** are very appearance focused, but not highly beauty engaged.

HOW TO READ THIS CHART

Beauty Affinity: A data-driven ranking of our audiences' engagement with beauty based on search behaviour. All score medium+. Low engaged personas excluded from dataset.

Masculinities: A qualitative measure of how audiences portray themselves on social media from more traditional, macho archetypes to more fluid, androgynous ones.

Size reflects audience size, Google Ads data
Color indicates **KOREA** vs. **US & UK** audiences

AUDIENCES' VALUES REFLECT IN THEIR TOP BRANDS.



FUNCTION, PHARMACY AND GROOMING.

Moderately engaged beauty audiences such as **Straightforward Optimists** and **Athletic Mavericks** gravitate towards pharma brands such as [CNP Laboratory](#) or [LAB Series](#) who connect via scientific formulas, clean design and trustworthy reputation.

In the US & UK, grooming brands like [Bevel](#) or [Murdock](#) draw upon masculine barbershop spaces to give men permission to self-care.

MAKEUP & LIFESTYLE FOR THE FASHION FORWARD.

Fashion Buffs engage with makeup, lifestyle and fragrance brands from luxe to accessible local players like [B.READY](#), [Official Nonfiction](#) and [Grafen](#).

In the US & UK, makeup has most affinity with fashion-forward audiences like **Luxe Fashionistas** and **Beauty Allies**. [Shakeup](#) is an exception — men's makeup with mainstream UK appeal thanks to highstreet distribution and straight talking tone.

LOOKING TO THE FUTURE.

**TWO TRANSFORMATIONAL CATEGORY
SHIFTS TO PUT ON YOUR RADAR.**



THE FUTURE IS GENDERLESS?

Pharmacy and luxe brands have been blurring gender lines with neutral semiotics and product-centric comms. Yet their social presence often remains female skewing.

In the US, activist brands like [Humanrace](#) have shaken up what gender-neutral really means and brought fresh attention to the argument that 'skin is skin'.

Younger male consumers are attracted to the simplicity, inclusivity and modernity offered by products that focus on skin needs, not gender.



SHIFT 1: THE BEAUTY DIVIDE

THE FUTURE IS DESIGNED SPECIFICALLY FOR MEN?

Hyper-personalization is a global beauty trend here to stay. Testosterone thickens skin, increases oiliness, collagen, and elastin. Shaving causes dryness, hyperpigmentation and ingrown hairs. This makes a strong case for men's specific solutions and DTC brands like [hims](#) and [geologie](#) are springing up to respond.

In makeup, men want to emphasize features like brows and seek out products that deliver natural, healthy finishes, not dramatic transformation. They look to brands like [WarPaint](#) to educate.



WHAT DOES THIS MEAN FOR BRANDS?

- Gendered products, without justification, are passé. Watchout legacy 'For Men' ranges.
- Invest in gender-neutral pharma and clean beauty brands for men — a global growth opportunity.
- Target men-specific skin needs, but be prepared to justify and own your genderedness.
- Create men's specific natural and effortless makeup looks for savvy markets. Include tutorials for makeup-curious consumers.



SHIFT 2: BEYOND BEAUTY

The word 'beauty' can be off-putting, cuing an uninviting feminized space. Rising masstige brands tap into the broader language of 'grooming', 'skincare' or conjure up masculine self-care traditions such as [barbershop](#) or [gentlemen's outfitters](#) as a way to invite men in.

Luxe brands are taking this to the next level. Positing beauty as part of broader lifestyle and culture choices — fashion, travel, accessories, art. These brands play with collaborations, experiential retail and product ranges that crossover category boundaries. Think [Aesop's City Guides](#) or [Tamburins](#) experiential retail spaces in Korea.

WHAT DOES THIS MEAN FOR BRANDS?

- Collaborations are expected. Grow your reach via smart partnerships in fashion, media and travel.
- Invest in experiential retail that blurs category boundaries and evokes aspirational lifestyle.
- Connoisseurship education beyond the basics. Offer 'insider's knowledge' on beauty as part of broader self-care and lifestyle.



Synthesis Audiences help you grow by identifying the most impactful activation platforms and brand partners to build meaning with your target.

IMAGE SOURCE: AESOP

20 — SYNTHESIS AUDIENCES: UNBOXING MEN

DATA-DRIVEN TACTICAL PRECISION

Synthesis Audiences create output designed for a smooth transition from strategic prioritization to tactical activation.

Go to market data playbook.

Client partners use our data cheatsheet to find impactful partners, media and influencers that land with your target audience, every time.

Make confident decisions with the latest data.

Built for longevity, our audience data can be efficiently refreshed so you can stay close to priority audiences.

Want these tools for
your brand?

[Tell me more](#)



Geek Out

LEARN ABOUT OUR METHODOLOGY

THE BEAUTY OF OPEN DATA

Open Source Intelligence pieces together public, online data to give a fresh perspective on familiar problems. Our approach sits at the intersection of data science, strategy and humanities.

Synthesis builds segmentations based on millions of Open Data connections — search, social, advertising.

HOW DID WE UNBOX MEN?

Our approach utilizes 3 key concepts:

1. **Network theory** to map, segment and prioritize groups of consumers, influencers and brands with connections to men's beauty.
2. **Audience communities** to understand the everyday people in each segment, and bring them to life.
3. **Image AI** and **Natural Language Processing** to derive insights about communities — what they talk about, wear, love.

Market Scope.

USA & UK (Global English). South Korea.

Data Sources.

Instagram for the network and community build. Search and Ad-targeting data from Instagram, Facebook, Google and Naver for sizing, demographics and prioritization.

THE DETAILS

Defining Dataset. Category experts define a **seed list** of hundreds of men-focused and gender-neutral brands and influencers in grooming, skincare, makeup, fragrance.

Building Audiences. Clustering algorithms create a **network** of people engaging with brands and influencers on the seed list. Similar interests cluster together. We sample profiles from each cluster to analyze their wider world.

Top Brands, Media, Influencers. By looking at top followed accounts distinct to each cluster, we can understand the shared interests of each group.

Sizing. We measure the addressable audience engaging with the category in the P30D on **Instagram, Facebook, YouTube** (interest) and **Google Search** (purchase intent). We size segments by measuring category engagement and with top authorities.

Image Analysis & Semiotics. We apply ML image models to group top engaging posts from beauty brands and influencers by visual themes. Semiotics experts led by James Archer, help unpack how messages can be tailored to appeal to each segment, and why.

DATA PRIVACY

Synthesis is committed to an individual's right to privacy. We do not store or process images from everyday users: only those from official brand, media and influencer verified accounts.

We only extract the data we need, and wherever possible we analyze fully anonymized aggregated data. All data from everyday users is anonymized and automatically deleted following the completion of a project. When a user removes a post or their account, the data is automatically removed from our dataset, too. Our data is encrypted and logged. We do not sell or share raw data with third parties.



OPEN SOURCE INTELLIGENCE FOR BRANDS



JOHN ELLIOTT



LA MER

Dr.Jart+

MAC

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ABOUT US

Synthesis does Open Source Intelligence for Brands.

A team of data scientists and cultural strategists working with clients across categories and geographies.

Want to meet and acquire your next growth audience?
Need to build strong connections to retain your core?

AUDIENCES@SYNTHESIS.PARTNERS

synthesis **Audiences**

Want to know shifting consumer demand, category and culture? Need to know when and how to activate?

TRENDS@SYNTHESIS.PARTNERS

synthesis **Trends**

The future is dynamic, why plan in a static way?
Want to explore scenarios and invent the future?

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