AARP SURVEY OF WOMEN'S REFLECTIONS ON BEAUTY, AGE, AND MEDIA™

October 2018

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AARP launched the DisruptAging® initiative to have a new conversation about how we want to live and age. DisruptAging® holds a mirror up to the ageist beliefs around us and features new ways of living and aging, and the products and solutions that make this possible.

The beauty and personal care industry is a multibillion dollar industry* serving the vast majority of women on a daily basis. Beauty and personal care products are among the most highly visible within the advertising space. For these reasons, AARP conducted Mirror/Mirror: AARP Survey of Women’s Reflections on Beauty, Age, and Media™

to understand women’s attitudes about beauty, aging, and media.

Key Findings

Women...

- **do not feel represented** in media images
- **want** advertisements to feature women of **various ages, sizes, and ethnicities**
- Make **purchase decisions that are affected by images** used in ads
- **agree** age does not define beauty
- are **more comfortable** in their own skin **as they age**
- feel the term “**old**” is relative and refers to someone else
- **prioritize health over beauty**
- still hold some **entrenched negative beliefs** about aging
Implications

Manufacturers of beauty and personal care products will need to align with the evolving customer value of authenticity by presenting advertisements that depict women in realistic ways and include women of a variety of ages.

Older women are an untapped resource to younger women who may feel more pressure to conform.

Messages and images that promote and celebrate health as well as beauty are likely to resonate with women.

When images in media are considered, online images must be addressed in addition to print.

More conversation is needed about conscious and unconscious bias to eliminate entrenched negative beliefs about age held by some women.
Women **do not** feel represented in media images

*Not feeling represented* in media images, and the desire to have more realistic images of women, is consistently strong across generations.

<table>
<thead>
<tr>
<th>Generation</th>
<th>Wish Ads Had More Realistic Images</th>
<th>Wish Represented in Imagery</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boomers</strong></td>
<td>76%</td>
<td>66%</td>
</tr>
<tr>
<td>generation X</td>
<td>76%</td>
<td>59%</td>
</tr>
<tr>
<td><strong>millennials</strong></td>
<td>77%</td>
<td>58%</td>
</tr>
</tbody>
</table>
Women across generations want advertisements to feature women of various ages, sizes, and ethnicities.
Images of "perfect" women are off-putting to many

Many women are annoyed by heavily airbrushed magazine covers and comforted by images of "imperfect" women.

41% of women say “My perception of my imperfections is magnified when I compare myself to images of women in media.”

How Images Make You Feel

<table>
<thead>
<tr>
<th>Heavily Airbrushed Photographs</th>
<th>Images of Women Who Do Not Look Perfect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annoyed</td>
<td>Comforted</td>
</tr>
<tr>
<td>Unattractive</td>
<td>40%</td>
</tr>
<tr>
<td>Discouraged</td>
<td>36%</td>
</tr>
<tr>
<td>Disappointed</td>
<td>29%</td>
</tr>
<tr>
<td>Attractive</td>
<td>26%</td>
</tr>
<tr>
<td>Happy</td>
<td>13%</td>
</tr>
<tr>
<td>Appreciated</td>
<td>4%</td>
</tr>
<tr>
<td>Inspired</td>
<td>4%</td>
</tr>
<tr>
<td>Inspired</td>
<td>3%</td>
</tr>
<tr>
<td>Comforted</td>
<td>4%</td>
</tr>
</tbody>
</table>

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Images used in advertising affect women's purchase decisions

Brands will benefit from using more realistic and a wider diversity of images of women

This does NOT differ as women age.

- **More Likely to Recommend**
  - A brand that uses women who look like me in their advertising
  - 55%

- **More Likely to Purchase**
  - Products from brands who use women who look like me in their advertising
  - 58%

Nearly 7 in 10 Women say their loyalty to brands can change

- 69%
Not only do a lot of women use beauty/personal care items, but half consider some products **essential**

52% of women have beauty/personal care items that are essential to them

48% of women use makeup items at least five days a week

### Beauty/Personal Care Products Currently Used

- **Shampoo/Conditioner (drugstore)**: 80%
- **Moisturizing Cream or Lotion**: 73%
- **Eyeliner, eyeshadow or mascara**: 67%
- **Facial Cleanser (foaming, lotion, oil)**: 64%
- **Nail Polish (at home or salon)**: 61%
- **Hand Cream**: 57%
- **Lip liner or Lipstick**: 55%
- **Blush**: 50%
Women across generations agree that age does not define beauty.

61% of women believe they are beautiful at any age.

Few (29%) say their greatest anxiety about aging is their appearance.

76% of women accept their age and 60% even embrace it.
The term "old" is relative — and refers to someone else

The age at which "old age" begins goes up with each generation. Even Boomers believe they are not yet old.

On average, women believe "old age" begins at 70 years old and "middle age" begins at 47 years old.

63% of women have an idea of what "old" is/looks like.

Age at which "old age" begins

- **Boomers**: age 74
- **Generation X**: age 70
- **Millennials**: age 67

Age at which "middle age" begins

- **Boomers**: age 51
- **Generation X**: age 47
- **Millennials**: age 44

78% of Boomers consider themselves middle aged — lending credence to the notion that consumers expect to live longer lives.
However, older women are more comfortable in their own skin

I am kinder to myself about my body image as I age

- **boomers**: 52%
- **generation X**: 41%
- **millennials**: 38%

I celebrate my body as I age

- **boomers**: 39%
- **generation X**: 28%
- **millennials**: 31%

I feel free to dress how I want

- **boomers**: 72%
- **generation X**: 61%
- **millennials**: 61%

I do not have a negative body image

- **boomers**: 51%
- **generation X**: 44%
- **millennials**: 44%
Among women who use social media, Millennials’ emotions are affected more than older generations

Among women who use social media as well as among women who post selfies with filters, Millennials are affected more (both positively and negatively) than Gen X and Boomers.
Women prioritize health over beauty

Women are concerned with maintaining their health as they age.

74% are concerned with staying healthy as they age
- Boomers: 78%
- Generation X: 73%
- Millennials: 70%

68% believe in the concept of healthy aging
- Boomers: 75%
- Generation X: 64%
- Millennials: 64%

- 64% Would rather be healthy/strong than a desired height/weight.
- 65% Say their greatest anxiety about aging is health issues.
- 61% Fear declining health (more than the 38% who fear death)
There is still work to be done

Some women still hold entrenched negative beliefs about aging. And some may be more able to spot a negative body image held by others than to see they have one themselves.

Attitudes about aging

- 42% of women dread getting older
- 34% of women associate aging with gaining weight
- 22% of women say “when I have an injury/pain, I automatically attribute it to age”

Attitudes about body image

- 31% of women have a negative body image vs. 48% of women who know other women with poor body images

Despite 64% of women feeling free to dress how they want (Boomers even more so that younger generations at 72%), what women wear in public changes as they age

<table>
<thead>
<tr>
<th>Garment</th>
<th>Boomers</th>
<th>Generation X</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sleeveless shirt</td>
<td>46%</td>
<td>59%</td>
<td>70%</td>
</tr>
<tr>
<td>Skirt above the knee</td>
<td>17%</td>
<td>32%</td>
<td>39%</td>
</tr>
<tr>
<td>Bikini</td>
<td>4%</td>
<td>16%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Appendix
Methodology

An online survey of 2,000 female respondents was conducted by W5 through AYTM – Ask Your Target Market online platform from August 31-September 3, 2018. Respondents’ ages ranged from 21-72 and included a mix of racial and economic demographics. The data were weighted by age, region, income, and race/ethnicity to reflect U.S. women age 21 to 72.

Data were analyzed applying the 95% confidence interval, in consideration of relevant margins of error. The margin of error associated with a 95% confidence interval for the total sample size of N=2,000 is +/- 2.2%.

The following definitions were used for each generation:

- **Boomers**: Age 54-72
- **Generation X**: Age 38-53
- **Millennials**: Age 21-37
Questions cited in report

Page 8
• I wish ads had more realistic images of women [Scale 1 to 5]
• I feel represented by the imagery of women in media [Scale 1 to 5]

Page 9
• I like advertisements with celebrities my age [Scale 1 to 5]
• I like ads that feature and celebrate women of various ages [Scale 1 to 5]
• Media images of women have positive portrayals of varied body shapes and ethnicities [Scale 1 to 5]

Page 10
• My perception of my imperfections is magnified when I compare myself to images of women in media [Scale 1 to 5]
• How do magazine covers with heavily airbrushed photographs of women make you feel?
• How do media images of women who do not look perfect make you feel?

Page 11
• I have personal care/beauty items that are essential for me [yes/no]
• I use makeup items at least five days a week [yes/no]
• Which, if any, of the following beauty/personal care products do you use? [yes/no]

Page 12
• I am more likely to purchase products from brands that use women who look like me in their advertising [Scale 1 to 5]
• I am more likely to recommend a brand that uses women who look like me in their advertising [Scale 1 to 5]
• My loyalty to brands can change [Scale 1 to 5]

Page 14
• I believe I am beautiful at any age [Scale 1 to 5]
• My strongest anxiety about aging is about my appearance [Scale 1 to 5]
• I accept my age [Scale 1 to 5]
• I embrace my age [Scale 1 to 5]

Page 15
• I have an idea of what “old” is/looks like [Scale 1 to 5]
• In your opinion, at what age does old-age begin?
• In your opinion, at what age does middle-age begin?

Page 16
• I am kinder to myself about my body image as I age [Scale 1 to 5]
• I celebrate my body as I age [Scale 1 to 5]
• I feel free to dress how I want [Scale 1 to 5]
• I have a negative body image [Scale 1 to 5]

Page 17
• My confidence is boosted by getting “likes” on social media [Scale 1 to 5]
• Selfies with filters make me feel better about my looks [Scale 1 to 5]
• Social media makes me feel insecure about my appearance [Scale 1 to 5]

Page 18
• I am concerned with staying healthy as I age [Scale 1 to 5]
• I believe in the concept of “healthy aging” [Scale 1 to 5]
• I would rather be healthy/strong than a desired size/weight [Scale 1 to 5]
• My strongest anxiety about aging is health issues [Scale 1 to 5]
• I fear declining health [Scale 1 to 5]
• I fear death [Scale 1 to 5]

Page 19
• I dread getting older [Scale 1 to 5]
• I associate aging with gaining weight over time [Scale 1 to 5]
• When I have an injury/pain, I automatically attribute it to age [Scale 1 to 5]
• I have a negative body image [Scale 1 to 5]
• Other women I know have poor body images [Scale 1 to 5]
• I feel free to dress how I want [Scale 1 to 5]
• Which of the following, if any, do you ever wear in public?

Scale questions: Scale of 1 to 5 where 1 means “do not agree at all” and 5 means “Agree completely.”
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AARP is the nation’s largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age.

With nearly 38 million members and offices in every state, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, AARP works to strengthen communities and advocate for what matters most to families with a focus on health security, financial stability and personal fulfillment. AARP also works for individuals in the marketplace by sparking new solutions and allowing carefully chosen, high-quality products and services to carry the AARP name. As a trusted source for news and information, AARP produces the nation’s largest circulation publications, AARP The Magazine and AARP Bulletin.

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