Reframe BEAUTY

From viral trends to verified trust, the new rules of Beauty cut through.

Exec Summary

The beauty industry is facing a credibility crisis: traditional trust signals no longer drive purchase, and while attention is easy to win, trust is harder than ever to earn.

1.
What changed

Three macro forces, heightened scepticism, demand for immediacy, and algorithmic nichification, have fundamentally altered how consumers discover, evaluate, and choose beauty products. 70% of consumers say they are more cautious about trusting brands than ever before.

2.
What Matters Now

Five trust cues drive all purchase decisions: I can see it's real, credible, works, others trust it, and it's for me.

But their importance shifts dramatically across *five fluid consumer mindsets* and four beauty categories.

3.
What to do next

Forget demographic targeting. Build credibility through mindset-specific strategies that stack the right trust cues for each audience, from Playing to Questioning to Grounding, and execute differently across *skincare, haircare, makeup, and fragrance.*

Beauty is one of the most expressive yet overwhelming categories today.

Beauty is one of the fastest moving, and commercially competitive categories in Australia.

- With over 500 new brands entering the Australian market in the last five years
- Information that feels limitless, on a global scale, moving at hyper-speed.

"Last time I went into Mecca looking for something for a wedding... it was so overwhelming. All I bought was a tinted moisturiser for my lips. It was just way too much. I couldn't deal with it. I didn't even know where to start."

- Female,37

“What I'm looking for there is if it is going to do something new or more or better for my skin... I guess that makes me anxious if I'm buying something new and it costs quite a lot and I don't know if it's going to work, and then there's disappointment if it doesn't.”

Female, 47, Mid Engagement

Consumers are more exposed and beauty literate, yet less confident in the choices they make.

Many know the language of ingredients, trends formats, and routines, but still feel unsure what to trust, what works, or where to begin.The result is a category where:

- *More information* creates *less certainty*
- *More brands* create *less clarity*
- *More influence* creates *less trust*

This leads to increasing switching, hesitation and trial dependency.

Three macro forces are reshaping Beauty decisions.

These forces are redefining how people discover, evaluate and choose beauty brands.

1.

Heightened *Skepticism*

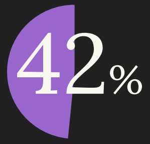
Consumers are actively scanning for what feels fake, biased or manipulated.

struggle to tell whether **recommendations are genuine or paid.**

2.

Demand for *Immediacy*

Speed of access to information is making newer information feels more reliable.



trust sources that respond **quickly to new trends or information** in beauty.

3.

Algorithmic *Nichification*

Algorithms are creating hyper-personalised bubbles, shifting influence and discovery.

say they discover beauty products through **communities of people with similar preferences to them.**

Traditional marketing won't cut through this noise.

Understanding the *fluid mindsets* consumers inhabit, and the *new trust cues* they actually respond to, will.

Five new trust cues are emerging as the signals that drive confidence in today's sceptical beauty market.

I CAN SEE IT'S REAL

Unfiltered, unedited, transparently imperfect

With the line between real and fake feeling blurrier than ever, authenticity is proven by eliminating or speaking honestly about bias.

I CAN SEE IT'S CREDIBLE

Relevant expertise over generic authority

Verifiable expertise still has a role to play, but the appetite for personal relevance has expanded it beyond traditional authority into lived expertise.

I CAN SEE IT WORKS

Real results, in real conditions, over time

In a world of filters, AI-images and paid-for content, realness is demonstrated through tangibility - showing up beyond a carefully curated photoshoot.

I CAN SEE OTHERS TRUST IT

Genuine peer proof, not paid influence

It's niche, en masse. Smaller, tighter echo chambers but a greater than ever need for information to be validated by others. People expect brands to be part of their conversations.

I CAN SEE IT'S FOR ME

Personally relevant, not mass-marketed

Beauty isn't one-size-fits-all anymore. People now want to see themselves reflected, in detail, in what they engage with. Brands now need to prove proximity.

But trust alone is not enough.

These trust pillars matter *differently* to *different people* in *different categories.*

Beauty behaviour is *fluid*, driven by *mindset* not demographics.

The same 35 year old woman who questions every skincare ingredient, may play freely with makeup colours. Behaviour shifts by category, context, and need, it is not fixed identity.

Our research identified five fluid mindsets that shape how people engage across beauty categories, life stages, and moments. Consumers move between them constantly.

Understanding these mindsets helps brands know which trust signals to use, and when.

How the mindsets pull apart

Open ⟷ **Closed**

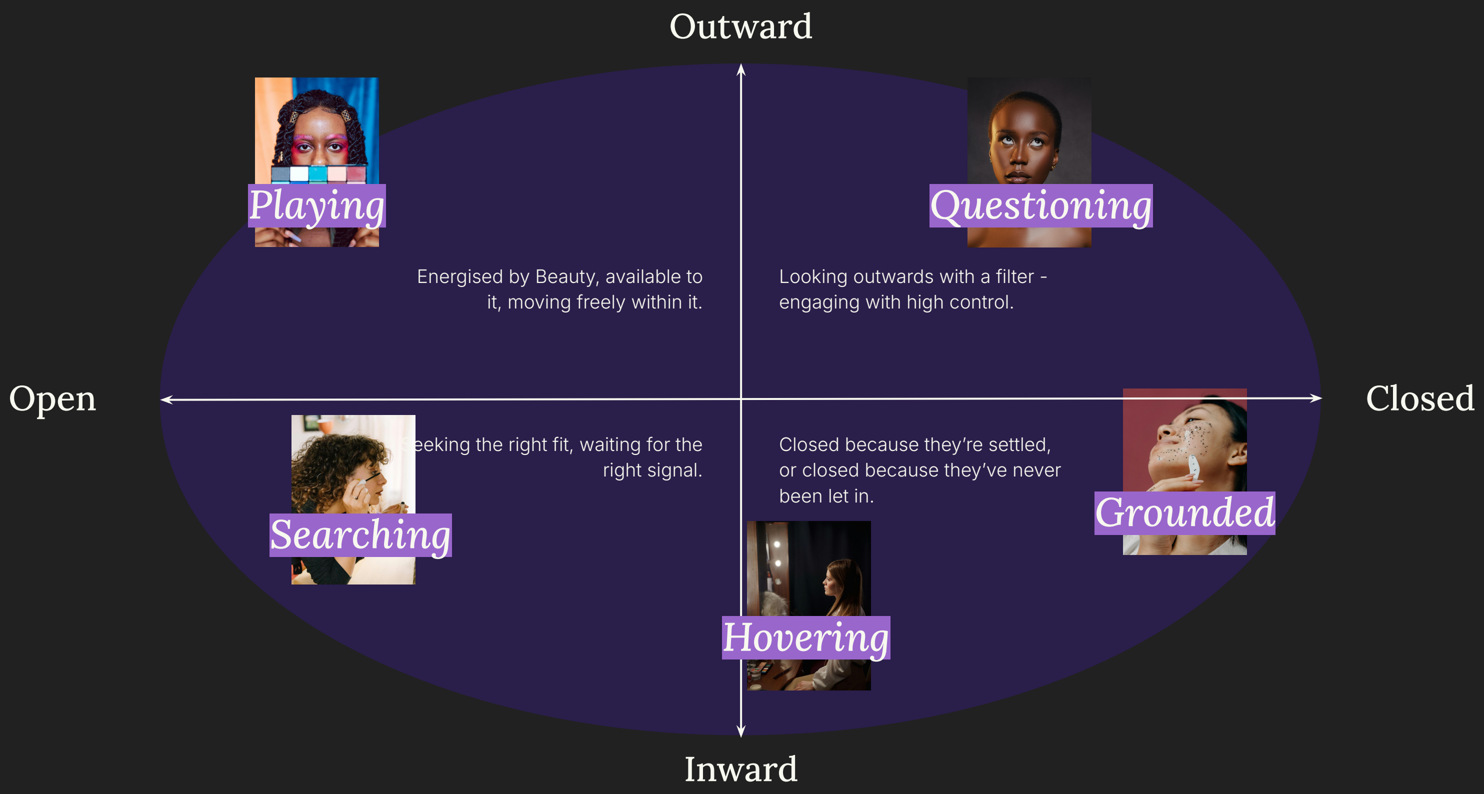
How receptive someone is to influence, ideas and change.

x

Outward ⟷ **Inward**

Whether their focus is directed inward (self-led) or outward (world-led).

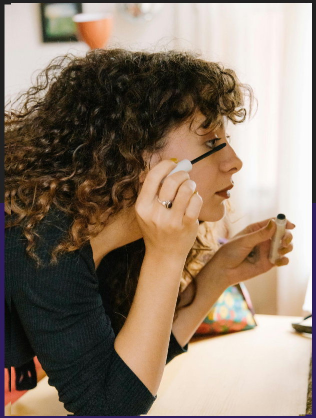
How the mindsets pull apart



The five core beauty mindsets

Playing

All about joy, pleasure and in the moment experimentation. No agenda or overthinking, just how it makes you feel.

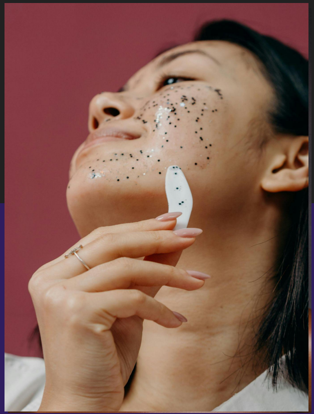


Searching

Uncertain and struggling to find what works. There's ambiguity and anxiety - purchase rate is high, satisfaction is low.

Questioning

Examining the category and industry at a deeper level. Strong radar for deception or misleading information, values-driven and not afraid to hold brands accountable.



Grounding

All about routine, consistency and stability. They've arrived, they're settled and they're less likely to be looking for something new.

Hovering

Feels distant from beauty and doesn't know where to start. The category doesn't feel made for them - they need simplicity and a genuine invitation in.

Category drives specific mindset behaviours.

These trust pillars matter *differently* to *different people* in *different categories.*

Skincare

Skincare is a high stakes category and is deeply personal to consumers. They prioritise safety and are wary of adverse reactions, making trust critical. To overcome scepticism, brands must move away from overpromising and instead deliver clear, honest proof.

Despite not carrying the highest levels of knowledge (36%), skincare drives the highest engagement (87%), reinforcing that involvement is driven less by expertise, and more by personal relevance and risk.

Dominant Mindsets

53%

of buyers in this category sit within a **grounded** (ix107) mindset. Skincare is risky, once they find something that works for them, there is little appetite to experiment.

32%

of buyers in this category have a **questioning mindset** (ix113) . They don't take things at face value and will ensure brands know that trust must be earned.

Skincare

Trust Pillars

1. *I can see it's for me*

81% of consumers need products that address their specific needs, while 74% want products designed for people like them. Skincare is driven by solutions that feel targeted and personally relevant.

2. *I can see it's real*

76% of consumers value honest, balanced reviews, reinforcing that trust is built through transparency, with consumers wanting to understand both the strengths and limitations before committing.

3. *I can see it works*

71% of skincare consumers want to see visible proof that a product works, while 63% value the opportunity to try before they buy, reinforcing that this is a results-driven category where proof needs to be seen, not just claimed.

Trusted Sources

1. *Expert Opinion*

55% of skincare consumers get their information and guidance from dermatologists.

2. *Video & reviews*

43% generate their own opinions through reviews or rating websites, whilst 24% turn towards video reviews and demonstrations.

3. *Family and Friends*

51% of skincare users turn to their family and friends for help, advice and guidance.

Makeup

Makeup is a lower stakes category, shaped more by expression than consequence. Consumers engage with it as a way to explore and project identity, making it inherently more emotional. To build trust, brands need to deliver inclusive, relevant ranges and stay culturally in tune with how consumers want to show up.

This category carries the lowest level of engagement (40%) and the lowest level of knowledge (26%) amongst users, highlighting a more passive relationship.

Dominant Mindsets

36%

of buyers in this category sit within a **grounded mindset**. There is more fluidity in this category which is reflected through it's emotional range and expression.

29%

of buyers in this category have a **questioning mindset**. When it comes to makeup, consumers need to see products through an unfiltered lens.

17%

of buyers in this category have a **hovering mindset** (ix227). Highlighting the need to start simple and welcome people in.

Makeup

Trust Pillars

1. *I can see it's for me*

78% want products that address their specific needs, and 77% want products designed for people like them, reinforcing that in a self expression category like makeup, representation is key.

2. *I can see it works*

73% want to see visible proof that the product works, and 70% want opportunities to try before they buy. For them, confidence comes from seeing results firsthand.

3. *I can see others trust it*

73% both want reviews from customers, and transparency which highlights the pro's and con's. Regardless of lower barriers in this category, trust is built on honesty for these consumers.

Trusted Sources

1. *Independent Research*

59% of makeup engagers prioritise looking at video reviews and demonstrations, as well as rating websites to be inform their decisions.

2. *Brand and Retail Ecosystem*

39% of consumers turn to retail stores, and 31% engage through brand websites and social media to stay engaged and aware.

3. *Family and Friends*

48% of makeup users turn to their family and friends for help, advice and guidance.

Haircare

Consumers in the haircare category often experience higher levels of anxiety and stress, with many feeling they've left it too late, only engaging once damage has already set in.

It carries the highest level of knowledge among the categories (41%), and one of the highest levels of engagement (84%), reinforcing that this category is incredibly health adjacent to consumers and is thought through with proper care and decision making.

Dominant Mindsets

47%

of buyers in this category sit within a **grounded mindset** (ix07)**.** Haircare is personal and high risk, finding something that works for them results in strong loyalty.

28%

of buyers in this category have a **questioning mindset.** They approach products with caution and a focus on avoiding long-term damage.

16%

of buyers in this category have a **searching mindset** (ix114)**.** They are highly skeptical of claims and demand credibility.

Haircare

Trust Pillars

1. *I can see it's for me*

78% of consumers need products that address their specific needs, while 73% want products designed for people like them. Haircare is a highly targeted category, requiring products to clearly address specific needs.

2. *I can see it's real*

70% of consumers value honest, balanced reviews, and 67% want transparent information about ingredients, claims and sponsorship. This reinforces the built credibility and clarity buyers need.

3. *I can see it's credible*

70% of consumers look for a strong brand reputation built over time, and 65% want to see products used in real life settings, reinforcing that credibility plays a role in reducing the anxiety buyers feel in this category.

Trusted Sources

1. *Expert Opinion*

52% of haircare consumers get their information and guidance from hairdressers.

2. *Family and Friends*

48% of users turn to their family and friends for help, advice and guidance.

3. *Video & reviews*

48% of users prioritise looking at video reviews and demonstrations, as well as rating websites to be inform their decisions.

Fragrance

Fragrance is driven by emotion, making it the least rational category. With immediate product trial, barriers to entry are low, creating an accessible space for new brands. To build trust, brands must prioritise sensory experience and strong personal relevance.

It carries relatively high knowledge (40%) and one of the highest levels of engagement (82%), showing that even in a low friction category, consumers are clear and confident in what they want.

Dominant Mindsets

45%

of buyers in this category sit within a **grounded mindset**, reflecting that fragrance is driven by personal preference and individual taste.

12%

of buyers in this category have a **playing mindset,** approaching products with curiosity and instinct, driven more by in the moment enjoyment than outcomes.

Fragrance

Trust Pillars

1. *I can see it works*

70% of fragrance buyers value when they have the opportunity to try and test a product before buying. This is a core part of the experience for them, ensuring they find the right fit.

2. *I can see it's credible*

70% of consumers in this category value brands that have built a strong reputation over time, showing that even in an emotional category, success is strengthened by established credibility.

3. *I can see it's for me*

70% of fragrance buyers need products to address their specific needs, and 68% need it designed for people like them. In this category, buyers are not looking for solutions, but relevance

Trusted Sources

1. *Family and Friends*

51% of users turn to their family and friends for help, advice and guidance.

2. *Brand and Retail Ecosystem*

38% of users rely on retail stores, whilst 28% rely on brand websites and social media.

3. *Video & reviews*

46% of users prioritise looking at video reviews and demonstrations, as well as rating websites to be inform their decisions.

In Summary

To build trust and cut through in the new era of beauty brands should...

Action 1

Audit for trust cues

Audit your current marketing against the five trust cues.

Identify which signals you're activating, and which critical ones you're missing.

Action 2

Map customer mindsets

Map your customer base to the five mindsets.

Stop speaking to "women 25-45" and start speaking to Searchers who need validation vs. Questioners who demand transparency.

Action 3

Build category credibility

Prioritise category-specific credibility builders.

What builds trust in skincare (verified expertise) will backfire in fragrance (sensory experience).

Action 4

Embed trust into all touchpoints

Build trust into every touchpoint, not just campaigns.

Embed proof, transparency and relevance across reviews, creators, retail, product pages and customer experience, so trust is experienced consistently.

This is just the tip of the iceberg

The beauty industry is moving at hyper-speed, and while this short deck highlights the shifting landscape of trust, there is much more to explore. Our **Full Reframe Beauty Master Deck** provides the deep-dive strategic analysis necessary to navigate this credibility crisis.

What's waiting for you in the full report.

- **Deep Dive into the Trust Cues:** Detailed breakdowns of how to activate to drive confidence in a skeptical market.
- **Granular Mindset Behaviors:** Comprehensive profiles of the Playing, Searching, Hovering, Questioning, and Grounding mindsets, including their specific challenges and brand preferences.

Ready to reframe your beauty strategy and build verified trust?

Reach out to your News Corp representative today to access the full Master Deck and comprehensive category insights tailored for your brand.

METHODOLOGY

1 Qualitative Exploration 1

Two days of individual pre-tasks to explore individual ideas on beauty.

n=20 participants x 40 minutes a day.

2 Qualitative Exploration 2

Online focus groups to discuss channel drivers, influence, trust and exploring opportunities for brands.

n=20 participants x 75 minute discussion.

3 Quant Validation

10 minute quantitative survey with n=2045 beauty engagers.

Validate and quantify the categories, mindsets, trust pillars, knowledge, engagement and channels in the beauty world.


Thank You
Reframe