White Paper

The Longevity Consumer: Power, Choice, and the New Dynamics of Modern Beauty

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I. Abstract

The beauty industry is entering a period of profound transformation driven by accelerating economic, cultural, technological, and psychological change. Today's consumers are navigating a landscape defined by instability, information saturation, rising individual responsibility, and increasing pressure to continuously optimize every aspect of their lives. As a result, beauty is evolving beyond aspiration and aesthetics alone, becoming more deeply tied to health, identity, emotional well-being, longevity, and personal control.

The modern consumer is being shaped by four defining macro forces: uncertainty, the erosion of the American Dream, cognitive fatigue, and the rise of optimization culture. Together, these shifts are fundamentally changing how consumers assign value, build trust, and make purchasing decisions across the beauty industry. In an environment marked by economic pressure, institutional distrust, information overload, and constant digital exposure, consumers are becoming increasingly intentional, emotionally selective, and verification-driven with how they spend.

Longevity has emerged as a defining cultural and consumer priority. Increasingly, consumers are approaching beauty and wellness not simply as categories of aspiration or aesthetics, but also as tools for self-optimization, maintenance, emotional well-being, and long-term quality of life. The body is increasingly viewed as a form of personal capital that can be managed, improved, preserved, and invested in over time. This shift is visible in the rise of preventative wellness, related to GLP-1 medication, ingredient scrutiny, clinical influence, trial-first behavior, and the growing demand for products and experiences that support long-term physical, emotional, and psychological resilience.

This white paper examines how these four macro forces are reshaping modern consumer psychology through the lens of longevity culture, arguing that the future of beauty will be defined not simply by aspiration or visibility, but also by a brand's ability to provide credibility, emotional reassurance, functional value, and meaningful participation in the consumer's ongoing pursuit of longevity, self-optimization, and personal well-being.

II. Introduction

For much of modern consumer culture, progress was measured externally through career advancement, homeownership, financial growth, and upward mobility. Today, however, many of those traditional markers of stability feel increasingly uncertain or inaccessible. In their place, consumers are turning inward. The body, mind, and self have become central sites of investment, maintenance, and control.

This shift is emerging at the intersection of four defining cultural forces: uncertainty, the erosion of the American Dream, cognitive fatigue, and the rise of optimization culture. Economic instability, institutional distrust, rising living costs, and constant digital exposure have created an environment in which consumers feel simultaneously overwhelmed and responsible for managing their own well-being, resilience, and future outcomes. As traditional systems of security feel less reliable, consumers are increasingly seeking forms of personal agency that feel immediate, tangible, and self-directed.

Longevity culture has emerged from this environment. More than simply a health or wellness movement, longevity reflects a broader psychological response to instability and overstimulation. To properly evaluate the scale of this behavior, it must be contextualized within the massive expansion of the global wellness economy, which has reached an unprecedented valuation of $6.8 trillion—surpassing the global sports and tourism sectors combined and standing at nearly four times the size of the traditional pharmaceutical industry (Global Wellness Institute, 2025). Within this macro-landscape, the longevity market has solidified into an independent $750 billion global force, projected to more than double over the next decade (Visiongain, 2026). Under this paradigm, wellness and beauty products are no longer viewed as superficial luxuries or categories centered solely on aspiration and aesthetics; instead, they are recognized as foundational inputs for extended human health span and integrated into broader systems of self-optimization and future-oriented living.

This market shift is best understood as a profound cultural and structural purification—a metaphorical "weight loss journey" across the beauty and wellness ecosystem. While an estimated one in eight American adults are utilizing GLP-1 medications for literal weight management, the broader consumer base is undergoing a parallel psychological cleanse. Driven by persistent systemic stressors, consumers are actively shedding the weight of accumulated routine excess: choice proliferation, product hyper-saturation, and relentless algorithmic content pressure. These shifts are fundamentally changing the emotional role consumption plays in everyday life. Increasingly, consumers are using beauty as a mechanism for creating stability, structure, and a sense of control within an unpredictable environment. Consumption is becoming less about excess and more about intentional maintenance: maintaining health, energy, appearance, emotional well-being, productivity, and future quality of life.

Importantly, this intentional reduction does not signal economic contraction within the personal care category but rather a hyper-efficient reallocation of consumer capital toward uncompromised efficacy, performance, and long-term biological utility. These behavior patterns are fundamentally redefining how consumers assign value. Products are no longer evaluated merely for immediate performance or desirability but also for their perceived ability to support long-term well-being, identity, functionality, and personal control. In this context, longevity represents more than simply living longer; it reflects a broader desire to preserve relevance, vitality, autonomy, and personal agency over time.

This white paper explores how uncertainty, the erosion of the American Dream, cognitive fatigue, and optimization culture are collectively reshaping modern consumer psychology through the lens of longevity. Through analysis of evolving discovery behaviors, preventative wellness, artificial intelligence (AI)-mediated influence, GLP-1-related behavioral shifts, and changing value systems, this research argues that longevity is evolving beyond a wellness trend into a broader cultural framework shaping how consumers navigate identity, consumption, and the future self.

III. Methodology

Overview: *This white paper uses a qualitative strategic synthesis approach to examine how macroeconomic instability, cultural shifts, technological change, and evolving consumer psychology are reshaping purchase behavior in 2026, with a particular focus on beauty, wellness, and longevity-oriented consumption.*

A. Research Approach

1. **Secondary Research:** The paper is based on analysis of existing literature, industry reports, business journalism, public datasets, and selected academic studies.
2. **Trends:** Rather than relying on a single source type, the analysis compares findings across multiple sources to identify recurring patterns and higher-order shifts in consumer behavior.
3. **Category Lens:** Beauty and wellness are used as key interpretive categories because they reflect broader changes in value perception, trust, discovery, and self-investment.

B. Source Base

1. The analysis draws from four main source groups:
    a) Industry and consulting reports: Sources such as McKinsey & Company, Deloitte, WGSN, Stylus, Circana, Euromonitor, Salesforce, and Capgemini were used to identify consumer, retail, and macroeconomic shifts.

b) Public and institutional data: Census, Brookings Institution, Congressional Budget Office, Pew Research Center, Federal Reserve, and World Economic Forum materials were used to ground the paper in demographic, economic, and societal context.

c) Academic and expert-backed literature: Peer-reviewed articles and expert publications were used where available to support claims related to consumer psychology, trust, trial behavior, and decision-making.

d) Trade, sector, and cultural sources: Publications such as *Business of Fashion*, *Harvard Business Review*, and category-specific reporting were used to capture real-time developments in beauty, discovery, and consumer culture.

e) Proprietary Quantitative Dataset (2026): To ground these macro shifts in empirical consumer behavior, this paper integrates primary quantitative survey data executed by the Fashion Institute of Technology Cosmetics and Fragrance Marketing and Management Graduate Program (FIT CFMM Graduate Program, 2026). This proprietary study tracked top-line consumer sentiment, purchase-driver priorities, and cross-tabulated behavioral matrices of beauty and wellness buyers navigating the 2026 economic landscape.

C. Analytical Framework

1. The research was organized into a set of strategic themes:

    a) macro shifts and economic constraint

    b) post-COVID consumer psychology

    c) skepticism toward institutions and the social contract

    d) longevity and biological self-investment

    e) AI, search, and nonlinear discovery

    f) trust, validation, and peer influence

    g) trialing, sampling, and experiential value

    h) redefinition of value through performance, emotion, and proof

2. Each theme was assessed using the following questions:

    a) What has changed in the consumer environment?

    b) How is that change affecting consumer mindset and behavior?

    c) What does that mean for discovery, trust, and purchase?

d) What are the implications for beauty and wellness brands?

D. Strategic Intent

1. This methodology was designed to do more than summarize trends. It also aims to do the following:
    a) define the new consumer mindset in a clear and actionable way
    b) connect macro forces to purchase behavior
    c) identify the emerging drivers of value and confidence
    d) translate research into strategic implications for brands competing in high-choice, low-trust categories

IV. Macro Shifts/Trends

A. Current Economic Reality for Consumers

Overview: *We are entering an age of constraint in which slowing economic growth, rising costs of living, and economic uncertainty are restructuring the way consumers spend. Consumers still have the desire to spend, and rather than spending less, they are spending with more intention.*

1. The consumer landscape in 2026 is defined by a systemic age of constraint. Economic uncertainty, rising essential costs, and widespread burnout have converged to create a risk-averse consumer who prioritizes stability over excess. This shift is evidenced by a projected slowdown in consumer spending growth to approximately 1.6% in 2026, as over 60% of households report an increasing financial burden from essentials such as housing, groceries, and healthcare (Rogers, 2026).
2. The contemporary consumer operates within this environment defined by pervasive systemic volatility and compounding financial stress. The lingering societal trauma of the global pandemic—which triggered a 25% worldwide escalation in diagnosed anxiety and depression (World Health Organization, 2022)—fundamentally disrupted consumer confidence, leaving long-term economic tremors exemplified by an unprecedented 14.8% peak domestic unemployment rate (U.S. Bureau of Labor Statistics & NAHB Analysis, 2020). By May 2026, the compounding burden of these structural shifts drove the consumer sentiment index to an all-time low since tracking began in the 1940s (University of Michigan, 2026). This economic malaise reinforces why an escalating financial burden is felt so acutely across the majority of households today (Gallup, 2025).

3. This cautious sentiment is mirrored by the broader financial community; 53% of economists expect global conditions to weaken further through 2026, even as some metrics show slight improvement over late 2025 (WEF, 2026).
4. This macroeconomic cooling is perhaps most visible in the luxury sector, where falling resale values for investment brands like Rolex and Hermes suggest a fundamental pivot away from traditional aspirational consumption (Ryan, 2026).
5. Discretionary spending power has become increasingly polarized, widening the gap between income cohorts. This divide is fueled by persistent inflation and tariff pressures, which reinforce uneven spending power across the market (Ma et al., 2026). While lower-income households respond with heightened price sensitivity, higher-income earners are driving the bulk of incremental growth. This is particularly evident in the 2026 U.S. tax refund projections, where over 50% of the estimated $130 billion in incremental discretionary spending is expected to originate from top-tier income earners (Ma et al., 2026). Compounding these financial pressures is a mental load crisis: 42% of workers across major markets report active burnout, a state of exhaustion that increases consumer aversion to risk and discourages unnecessary or impulsive spending in favor of high-confidence, necessary purchases (WGSN, 2025).
6. Rather than cutting back entirely, the modern consumer is engaging in a sophisticated splurge/save paradox. Under this strategic matrix, consumers are actively shifting capital away from legacy, unattainable macroeconomic assets—such as traditional home mortgages or long-term job security—and aggressively protecting high-yield personal care assets within their immediate grasp. When auditing where consumers intentionally reduced spending over a 6-month period, the extreme structural durability of the personal care vertical becomes clear:

SPENDING CUT CATEGORIES OVER PREVIOUS 6 MONTHS

Spending Category	Consumer Spending Reduction Rate (%)
Dining Out	54.59%
Clothing	47.53%
Travel & Vacation	44.70%

Streaming Services	34.81%
Beauty & Wellness	33.04%
Groceries	32.16%

Aside from nondiscretionary groceries, beauty and wellness experienced the lowest rate of spending contraction of evaluated discretionary categories at 33.04%, remaining vastly more insulated against economic stress than legacy luxury and leisure sectors (FIT CFMM Graduate Program, 2026). This strategic reallocation involves trading down in utilitarian categories to fund high-impact indulgences elsewhere. In the first half of 2025, over one-third of global consumers reported trading down in at least one category to afford a splurge in another, while 19% expressed a willingness to cut back even on essentials to protect their discretionary indulgences (Weaver et al., 2025). This behavior is often a response to hustle culture, as consumers squeezed by living costs prioritize smaller, more attainable forms of progress and fulfillment (WGSN, 2025).

7. Generational spending patterns further complicate this reality. Gen Z demonstrates the most volatile behavior, balancing high financial anxiety with a singular willingness to splurge on beauty; 29% of Gen Z shoppers cite beauty as their top splurge category, with over 34% willing to utilize credit to purchase desired items (Weaver et al., 2025; Sherman et al., 2026). Conversely, older cohorts maintain a stricter price discipline. Gen X remains the cohort least willing to pay full price for an item, regardless of their brand affinity, though this willingness does scale upward as income increases (Sherman et al., 2026). These variations underscore the necessity for brands to contextualize value through the specific income, geography, and life stage of their target demographic (World Economic Forum [WEF], 2026).
8. Value-seeking consumers now spend 40% to 50% less on discretionary categories than non-value seekers, reflecting a more disciplined approach to spending (Rogers, 2026). While a growing middle class with rising spending power maintains an appetite for aspirational goods, they do so with increased caution and specific criteria for what constitutes a worthy expense (World Economic Forum [WEF], 2026).

9. The adoption of off-price and wholesale channels is rising even among households earning over $125,000 annually, signaling that seeking deals is now a strategic choice rather than a financial necessity (Sherman et al., 2026).

10. This trend is pervasive among younger cohorts as well; 80% of U.S. Gen Z shoppers visited a wholesale or value channel in the past month (Weaver et al., 2025).

11. The success of this model is underscored by the rapid expansion of discount retailers like Aldi, which became the third-largest grocery chain in the United States by store count in 2025 (King, 2025).

12. This cross-demographic movement toward value channels suggests that high-income consumers are increasingly unwilling to pay a prestige tax unless the product offers a clearly differentiated benefit.

13. Consequently, trial sizes, sampling, and mini formats have moved from the periphery to the center of the conversion journey. This trial-first mindset is particularly dominant in the beauty sector, where sales of mini skincare products grew more than twice as fast as the total skincare market in 2025 (Circana, 2025). By utilizing these smaller formats, consumers can gain the necessary confidence in a product's efficacy before committing to a full-size purchase, transforming the discovery phase into a low-stakes pilot program for their personal care portfolio.

Key Takeaway: *The value proposition is more important than ever as the bar for justification is being raised. The same consumer can be both in the premium category while also being price-sensitive. Brands must consider not just how to get the attention of the consumer, but also how to compete for their permission to spend.*

B. Cultural Context

1. Population by Generation

a) The Aging Trend: The U.S. median age has continued to rise, reaching 39.4 in 2025. This is largely driven by the Baby Boomer generation entering their 80s, which is placing increased focus on healthcare and retirement systems (Brookings Institution, 2024).

b) Growth Projections: The Congressional Budget Office (CBO) projects the total U.S. population will reach approximately 349 million by the end of 2026. Growth is slowing, and by 2030, net immigration is expected to be the primary driver of population increases as birth rates decline (Congressional Budget Office [CBO], 2026). This shifting demographic landscape and structural economic divergence have triggered a striking demographic inversion regarding how these generational cohorts approach personal care. Across the entire consumer base, a definitive 57% majority now views wellness and beauty through a resilience-based framework rather than an appearance-based one (FIT CFMM Graduate Program, 2026). This psychological realignment manifests in distinct, highly strategic behaviors at both ends of the age spectrum, shifting how populations manage their personal biology over time.

c) Generation Alpha (born 2013–2026): Approximately 51.2 million. This is the newest generation, consisting entirely of children and young adolescents (U.S. Census Bureau, 2025).

d) Millennials (born 1981–1996): Approximately 74.1 million. Currently the largest adult generation in the U.S., millennials are in their prime career and family-building years (U.S. Census Bureau, 2025).

e) Generation Z (born 1997–2012): Approximately 71.1 million. This cohort is rapidly entering the workforce and now makes up more than 20% of the total population (U.S. Census Bureau, 2025). Most remarkably, the youngest segment of the adult consumer base (specifically ages 18 to 29) drastically overindexes at a 72% alignment with a resilience-centered longevity philosophy (FIT CFMM Graduate Program, 2026). This younger demographic is executing clinical interventions decades ahead of historical schedules, verified by clinical metrics showing that approximately one-third of total consumer demand for neuromodulators like Botox is now driven by patients under the age of 40, who deploy these treatments as early preventative optimization before visible lines ever manifest (Janin, 2023).

f) Generation X (born 1965–1980): Approximately 65.4 million. Often called the "sandwich generation," Gen X is currently balancing peak earning years with caregiving for both children and aging parents (U.S. Census Bureau, 2025). Along with Baby Boomers, consumers in this bracket who are over 50 remain global beauty's highest-value cohort. Rather than retreating from the market, they are approaching aging not as an inevitable decline, but as a data-driven, lifelong optimization process.

g) Baby Boomers (born 1946–1964): Approximately 64.4 million. This group is seeing a natural decline in size as they age, with the oldest members of this generation turning 80 in 2026 (U.S. Census Bureau, 2025). As a foundational pillar of the high-value over-50 demographic, Boomers are heavily driving the longevity movement, intentionally reallocating discretionary capital toward biological preservation, cellular defense, and extended health span metrics.

h) Silent Generation (born 1928–1945): Approximately 13.7 million. Now ages 80 to 97, this group makes up about 4% of the U.S. population (U.S. Census Bureau, 2025).

2. The Evolution of Artificial Intelligence

Overview: *Artificial intelligence has rapidly evolved from a technical tool into a pervasive cultural force that shapes identity, creativity, and social norms. As AI becomes embedded in everyday life, it increasingly influences how individuals perceive themselves and interact with society, effectively participating in the construction of modern identity. At the same time, advances in generative systems have expanded the boundaries of creative production, enabling machines to produce music, visual art, and written content, thereby challenging traditional notions of authorship and authenticity. This shift positions AI not merely as a tool but also as a collaborator in cultural creation.*

a) AI-driven algorithms play a critical role in curating information and media consumption, acting as powerful gatekeepers that shape public discourse and cultural narratives. However, these systems are not neutral; they can reproduce and amplify existing societal biases embedded in their training data, raising concerns about representation and equity. Popular cultural depictions of AI further reinforce a feedback loop between technological development and societal perception, influencing both public expectations and the trajectory of innovation. These dynamics illustrate how AI is blurring the boundaries between human and machine agency, emerging as an active participant in the production, mediation, and interpretation of culture (Megasis Network, 2024).

b) Even as the use of AI spreads rapidly, most of its value today comes from individuals using it to enhance everyday tasks while deeper, transformative impact remains limited (Singla et al., 2025).

c) Half of U.S. adults say the increased use of AI in daily life makes them feel more concerned than excited, according to a June 2025 survey. Just 10% say they are more excited than concerned. Another 38% say they are equally concerned and excited (Faverio & Kikuchi, 2026).

d) U.S. adults are generally concerned about AI's effect on creativity and relationships but are more open to using it for data analysis (Faverio & Kikuchi, 2026).

e) This prevailing cultural anxiety is structurally anchored in both economic precarity and information saturation. The rapid acceleration of generative artificial intelligence has introduced a deep layer of employment and cognitive anxiety for consumers. More than one in four Americans report active employment anxiety regarding artificial intelligence and AI-driven displacement (Pew Research Center, 2026). Furthermore, the deployment of AI in commercial content engines has accelerated message velocity far beyond human processing thresholds, contributing heavily to the fact that 85% of the adult population reports feeling chronically overwhelmed by online information (WGSN, 2024).

f) This data-driven velocity has manifested as an acute crisis of authenticity in the digital purchasing journey. Proprietary data reveals that 25.36% of beauty shoppers cite the inability to discern AI-generated content from real human copy as a direct driver of shopping anxiety, placing generative AI tools at the absolute bottom of consumer trust metrics, with only 4.0% of respondents ranking AI engines as a trusted source of product information (FIT CFMM Graduate Program, 2026).

g) A majority of teens use AI chatbots. Roughly two-thirds of U.S. teens ages 13 to 17 (64%) say they have ever used an AI chatbot, according to a fall 2025 survey (Faverio & Kikuchi, 2026).

h) Younger cohorts drive adoption: approximately 76% of people under 30 use AI,whereas rates among older groups are much lower (Harris et al., 2025).

3. GLP-1 Usage

***Overview:** GLP-1 adoption is catalyzing a shift from volume-based indulgence to identity-based investment. As biological impulses are chemically dampened, the consumer's focus shifts from short-term satisfaction to long-term self-curation. This strategic reallocation of biological capital reinvests money once spent on caloric frequency into visual self-expression, experiential wellness, and a perceived better version of the self.*

a) J.P. Morgan Global Research forecasts that the global incretin market, which includes GLP-1s, will reach $200 billion by 2030.

b) It also estimates that approximately 25 million Americans will be on GLP-1 treatment by 2030, up from around 10 million in 2025, 6 million in 2024, and 5 million in 2023.
c) The introduction of generics and oral pills is expected to increase usage both in the U.S. and around the world.
d) Less clear is how GLP-1s will influence other industries, from adjacencies like medical device technology to downstream sectors like food and beverage. “GLP-1 treatments are projected to lead to an annual revenue reduction of $30–$55 billion by 2030–2034 for the food and beverage industry, with consumers taking in 21% fewer calories and spending 31% less on groceries,” said Lucas Ferreira, who covers the Latin America Food, Beverages, and Agribusiness sector at J.P. Morgan.
e) In mid/late 2025, 12.4% of U.S. adults reported taking a GLP-1 medicine specifically for weight loss, up from 5.8% in February 2024 (Gaudiaut, 2026).
f) The rapid adoption of GLP-1 medications serves as a leading indicator of a broader behavioral transition toward metabolic intentionality. As these treatments chemically dampen biological impulses, consumer spending is shifting away from volume-based indulgence and toward high-value investments in self-image.
g) Data from the first year of treatment reveals a strategic reallocation of biological capital: While grocery spending declined by up to 8% in GLP-1 households, total outlays fell by only 2% to 3%, suggesting that money once spent on caloric frequency is being reinvested into visual self-expression and experiential wellness (Furman & Leinwand, 2025).
h) Nearly 60% of Gen Z consumers trade down on household staples to splurge on health, wellness, and beauty (First Insight, 2026).
i) This pivot is most visible approximately 6 months into treatment, when apparel spending typically rises by 5% and interest shifts toward wellness-oriented travel and intentional, social dining over fast-food convenience (Furman & Leinwand, 2025).
j) This shift in biological capital is creating a new category of aesthetic needs centered on structural integrity.
k) Our proprietary quantitative research uncovers a direct, powerful link between this pharmaceutical weight optimization and skincare demand: 33.3% of the surveyed personal care user base has actively used or currently use a GLP-1 medication (FIT CFMM Graduate Program, 2026). Among this massive clinical user base, a staggering 71.58% report a heightened, accelerated interest in high-performance

body care solutions, specifically demanding advanced skin-firming topicals, cellular muscle recovery treatments, and clinical body-sculpting interventions to address rapid structural tissue changes (FIT CFMM Graduate Program, 2026).

l) Over 50% of GLP-1 receptor agonist treated patients expressed concern about their facial appearance changing due to the use of the drugs. (Reach MD, 2026).

m) Rapid weight loss has turned “Ozempic face” and “Ozempic body”—characterized by skin laxity and volume loss—into primary aesthetic anxieties, driving a surge in demand for topical volumizers and skin architecture treatments that treat skin as a depleting asset.

n) Furthermore, 63% of GLP-1 patients seeking these aesthetic treatments are first-time entrants to the cosmetic clinic market, creating a massive clinical gateway for bridge products that complement in-office biostimulators (Furman & Leinwand, 2025).

o) Even sensory preferences are being recalibrated; medications are altering fragrance needs, moving demand toward fragrance-free options for nausea management or functional gourmand scents that serve as calorie-free sensory substitutes for the sweets consumers no longer crave.

p) Beyond skin, the beauty and wellness markets are expanding to address total body integrity, specifically focusing on the muscle loss (sarcopenia) that often accompanies rapid weight loss. This is driving a convergence between muscle-toning technologies and topical firming serums to maintain overall body longevity.

q) For brands built on models of impulse or frequency, this metabolic shift represents a profound challenge to long-standing demand models. The dampening of the craving cycle forces a move away from habitual, low-consideration loyalty toward a disciplined identity-based investment where value is measured by how effectively a brand assists the consumer in the ongoing project of biological self-optimization.

Field Study Insights: *Indulgence redefined. Despite the prevalence of GLP-1s and conscious consumerism, indulgence remains essential—but it is intentional, occasional, and elevated. Sweets are consumed in smaller amounts or reserved for special occasions (Pick-n-mix Stockholm); indulgence is more ritualized and higher-quality.*

Key Takeaway: *The industry is entering a supportive wellness era where products must act as functional partners to medical interventions. Success for* *longevity-focused brands lies in providing the biological infrastructure required to manage the structural and sensory side effects of rapid weight loss. By positioning products as essential bridge treatments for first-time clinical patients, brands can transition from being discretionary splurges to becoming necessary functional partners in the consumer's medicalized beauty journey.*

4. Skepticism of the Social Contract (Death of the American Dream)

Overview: *The foundational promise of the social contract—that hard work leads to upward mobility and a more prosperous future—has significantly weakened in recent decades. Rising costs of essential goods, such as housing and education, coupled with widening wealth inequality, have decoupled hard work from financial security for a large portion of the population. At the same time, the erosion of institutional support systems and declining trust in government and corporations have fueled a growing perception that the system is structurally unfair. As a result, individuals are increasingly shifting from aspirational, long-term planning toward short-term risk management and financial self-preservation. This skepticism is reshaping consumer behavior, fostering a more defensive, stability-driven mindset that prioritizes security over advancement.*

a) The fundamental promise of the American Dream, that each generation will be better off than the previous one, is fading; children born in the 1980s and 1990s have only a 50% chance of out-earning their parents, compared to a 90% chance for those born in the 1940s (Opportunity Insights, 2024).

b) Skyrocketing costs for "middle-class essentials," particularly housing and education, have decoupled hard work from financial security; by 2026, the median home price-to-income ratio remains at historic highs, rendering traditional homeownership unattainable for many (Pew Research Center, 2025).

c) The traditional, linear socioeconomic roadmap—anchored by the milestones of higher education, stable corporate employment, homeownership, and having children—has effectively dissolved. Remarkably, only 21% of young adults ages 25 to 34 have successfully achieved these four traditional milestones—a collapse from the 45% baseline recorded in 1975 (U.S. Census Bureau, 2025).

d) Proprietary quantitative research reveals that 42.3% of modern beauty consumers are either entirely neutral or explicitly state they do not believe the American Dream is achievable for someone like themselves (FIT CFMM Graduate Program, 2026).

e) This economic displacement has triggered a deep psychological realignment, uncovering a direct, inverse correlation between structural skepticism and the adoption of longevity-driven self-reliance (FIT CFMM Graduate Program, 2026).

AMERICAN DREAM AND LONGEVITY ALIGNMENT

American Dream is Achievable	Longevity Alignment
Strongly Agree	47.0%
Agree	57.0%
Neutral	61.0%
Disagree	72.0%
Strongly Disagree	94.0%

f) Skeptics recognize that while institutional systems are volatile, their physical health span and cellular vitality remain entirely within their own governance. Among these systemic skeptics, 78% explicitly prioritize long-term bodily resilience as the ultimate output of beauty, completely displacing superficial, cosmetic appearance-centered metrics in favor of biological self-preservation.

g) There is a growing skepticism toward meritocracy as a fair system, with many viewing it as a "winner-takes-all" framework that justifies extreme wealth inequality while ignoring structural barriers to success (Sandel, 2020).

h) The shift from collective institutional support to individual risk—such as the disappearance of pensions and the rise of high-deductible healthcare—has created a state of precarity where even high earners feel “one crisis away from ruin” (Packer, 2013).

i) Skepticism of the social contract is reflected in record-low levels of public trust in government and corporate institutions, as citizens increasingly feel the "rules of the game" are rigged in favor of elites (Edelman, 2026).

j) The concentration of wealth has created a divergent reality where the top 10% of households hold two-thirds of the nation's wealth and the bottom 50% have negligible assets to pass on to the next generation (Federal Reserve Board, 2025).

k) Driven by a lack of job security and the erosion of the safety net, 71% of workers who are unhappy in their roles are choosing to stay put rather than risk a new venture, a behavior termed "job hugging" that prioritizes immediate stability over career growth (Allianz Life, 2025).

l) Young adults are increasingly using transnational mobility as a survival strategy, moving abroad not just for adventure but also as a calculated effort to maintain a middle-class status that is no longer guaranteed at home (Lee et al., 2026).

m) Skepticism has led to a "survivalist" approach to personal finance; for 2026, the most common resolutions are paying down debt (42%) and checking credit scores (36%), as individuals prioritize defensive financial health over aspirational investing (NEFE, 2026).

n) High levels of economic despair are strongly correlated with a withdrawal from civil society, with skeptical individuals being more likely to experience loneliness and isolation, making them more vulnerable to misinformation and radicalization (Brookings Institution, 2024).

o) The "cost of entry" crisis has forced a behavioral shift in life planning; 58% of adults now find it significantly harder to purchase a home than their parents did, leading to the indefinite delay of marriage, homeownership, and having children (WSJ-NORC, 2025).

p) As social mobility stalls, there is a marked behavioral shift toward external control, where individuals attribute their life outcomes to fate or powerful other factors rather than their own initiative, leading to decreased effort in education and career advancement (NIH, 2022).

Field study insights: *Less risk = more innovation. Innovation thrives in systems that reduce or remove risk. A strong social safety net enables risk-*

taking. There is governmental support for innovation (KTH Royal Institute of Technology, 2026). Research by educators is structured to reward the individual, not the institution, acting as an incentive to push the boundaries above and beyond what is called for (professor's privilege). Public education and healthcare systems, government-backed research & development funding are prioritized by society.

Key Takeaway: *The American Dream is not just fading—it is actively breaking down the social fabric. The data collectively tells a story not merely of economic hardship but also of a deeper crisis of belief. When hard work no longer reliably translates into security, people don't just struggle financially—they disengage. They stop trusting institutions, stop taking risks, stop planning for the future, and in some cases, stop participating in society altogether. The result is a self-reinforcing cycle: Structural barriers erode opportunity, which erodes belief in meritocracy, which erodes motivation and civic engagement, which further entrenches inequality.*

5. Post-COVID Consumer Psychology

Overview: *The COVID-19 pandemic accelerated digital adoption and led to shifts in expectations around value, convenience, and risk. These shifts have fundamentally reshaped consumer behavior, driving not only a sharp decline in spending but a deeper reassessment of how, why, and where consumers choose to spend. At the same time, uneven economic recovery has widened disparities in spending power, reinforcing a more polarized and cautious consumption landscape. As a result, purchasing decisions have become more intentional and future-oriented, with weakened brand loyalty and a heightened emphasis on trust, control, and long-term well-being.*

a) The COVID-19 pandemic fundamentally reshaped consumer demand and the psychological drivers of purchasing behavior. According to McKinsey & Company, global consumer spending declined sharply during the pandemic, driven not only by economic constraints but also by heightened health concerns and restrictions on everyday life.

b) More importantly, the crisis accelerated lasting behavioral shifts, including rapid digital adoption and changes in how consumers evaluate value, convenience, and risk. McKinsey highlights that many of these new behaviors are "sticky," persisting due to improved experiences and sustained consumer investment.

c) At the same time, recovery has been uneven across income groups, reinforcing a growing divide in spending power and priorities.

Collectively, these dynamics signal a deeper shift in consumer psychology: Purchasing decisions are increasingly intentional and future-oriented, shaped by a heightened awareness of control, security, and long-term well-being rather than purely habitual or convenience-driven behaviors (Remes et al., 2021).

d) Faced with a subsequent socio-political climate that feels fundamentally unreliable, post-COVID consumer psychology is increasingly defined by a deep, defensive turn inward. When external landscapes become impossible to forecast, personal sovereignty becomes the ultimate defensive asset. Consumers are anchoring their focus exclusively onto the microscopic domains within their immediate control: their biology, their immediate domestic spaces, and their personal financial allocation.

e) Because 55% of workers tie their core sense of identity and self-worth directly to their professional output (Gallup, 2014), systemic precarity has driven millions to structurally reinvent their relationship with labor. The independent freelance economy has surged to a $1.5 trillion annual ecosystem consisting of 83 million American gig workers, with 70% reporting that independent labor has directly improved their holistic well-being (Burlacu & Monahan, 2025). Additionally, 14% of Americans ages 16 to 54 are now operating as paid content creators, establishing self-directed livelihoods outside traditional corporate structures (Keller et al., 2023).

f) This massive migration toward autonomous labor is a direct psychological precursor to the longevity consumer: When macrosystems fail to provide stability, the individual constructs their own security by optimizing their personal performance.

g) Brand loyalty weakened considerably during the pandemic as supply chain disruptions and availability constraints pushed consumers to explore alternatives. The World Economic Forum suggests that a large proportion of consumers switched brands during this period and remain open to doing so, reinforcing the need for brands to continuously earn trust rather than rely on established loyalty (Torkington, 2021).

6. The Longevity Movement

Overview: *Longevity has evolved from a vanity project into the privatization of security. In an era defined by systemic instability, the consumer has identified* *the body as the last controllable asset—effectively self-insuring biologically against an unpredictable future. This transforms aging from a visual anxiety into a manageable biological risk profile where the goal is no longer to mask decline but rather to fortify the human architecture against the invisible deterioration caused by stress and chronic inflammation. Value is now found in biological resilience: the ability to remain functionally young as a hedge against a fragile world.*

a. The longevity movement represents a fundamental evolutionary leap from traditional wellness frameworks. While historical wellness models focused heavily on immediate, daily mitigation—helping the individual "feel better today"—the longevity mindset expands the temporal horizon entirely. It dictates proactive, data-driven decisions executed today to explicitly engineer and optimize how an individual functions decades into the future.
b. The cultural perception of aging is undergoing a fundamental transformation, shifting from a focus on visible youth preservation to the management of invisible biological risk.
c. In this new paradigm, longevity turns aging into a measurable and manageable risk profile, effectively repositioning beauty from symbolic enhancement to essential biological intervention.
d. This shift is driven by an increasing awareness of systemic deterioration; for example, 55% of adults over the age of 30 now show elevated inflammation markers (hs-CRP), a condition known as "inflammaging" that is directly linked to chronic disease (Mensah et al., 2025). As a result, the consumer's primary concern has migrated from surface-level wrinkles to the underlying cellular health of their human architecture.
e. Propelled by digital subcultures that popularize terms like *looksmaxxing*, *softmaxxing* (the tracking of precise topical regimens and nutritional chemistry), and invasive *hardmaxxing* structural interventions (Reddy, 2026), consumers treat their biology exactly like a highly managed asset portfolio. Under this paradigm, youth and vitality are quantified, tracked, and diversified across medical interventions, biomarker biohacking, and preventative clinical aesthetics.
f. This transition toward biological management is further reinforced by a growing prevention-first mindset. Currently, 78% of consumers believe that prevention is superior to a cure, a sentiment that has led to a widespread rejection of traditional beauty narratives (Stylus, 2025).
g. Over half of Gen X and nearly half of Baby Boomers now report negative feelings toward the term anti-aging, preferring more progressive descriptors such as well-aging, slow-aging, and longevity (WGSN, 2025).

h. This semantic shift reflects a deeper desire for a biological partnership with brands rather than a combative relationship with time. Consumers are looking for maintenance solutions that allow them to optimize their health span rather than simply masking its decline.
i. The urgency behind this biological fortification is compounded by the "rest revolution," as consumers grapple with unprecedented levels of systemic stress. With 91% of adults reporting high stress and 63% prioritizing sleep and mental health more than they did 5 years ago, the body is increasingly viewed as the last controllable asset in an unstable world (WGSN, 2026).
j. In this context, beauty products are being reevaluated for their ability to provide anti-inflammatory benefits that address physiological stressors like cortisol and sleep deprivation.
k. By treating the skin as a biological portfolio, consumers are effectively self-insuring against an unpredictable future, seeking resilience as a hedge against both environmental and internal deterioration.
l. Amid the shifting trust, economic instability, and widespread uncertainty, consumers are increasingly turning inward and reframing their bodies as the last reliable asset they can control. Longevity in this context is no longer about preserving youth or changing aesthetic ideals, it is about mitigating risk and creating personal stability in an unstable world.
m. As traditional systems of security feel less dependable, consumers are effectively self-insuring through preventative health, wellness, and long-term biological investment.
n. This shift is both psychological and behavioral: Up to 60% of consumers now report that healthy aging is a top priority, while 80% of consumers are actively adopting preventable approaches to maintain future well-being (Stylus, 2025).
o. At the same time, financial instability, illustrated by the fact that over half of millennials live paycheck to paycheck, intensifies this mindset and reinforces the need to invest in what feels enduring and within one's control.

Field study insights: *Moderation as a path to longevity. Sectors that are viewed as traditionally unhealthy must find new ways to appeal to the health-conscious consumer via fundamental changes to their core principles and product offerings. Carlsberg Group adopts moderation as a core pillar in their mission, launch of a low 2.5% ABV (alcohol by volume) beers. Magnum ice cream creates Minis, and in Sweden, sweets are reserved for Saturday events with family. Consumers are more aware of the risks of drinking, smoking, sugar, etc., and the risk-benefit ratio is shifting in favor of extending life, resulting in less consumption when it occurs and saving these activities for special occasions.*

Key Takeaway: *The beauty industry is shifting from the aesthetics of youth to the engineering of resilience, where brands must compete for a place in the consumer's biological portfolio rather than their vanity. This requires a pivot toward narratives of biological partnership, replacing anti-aging with cellular maintenance and inflammaging correctives that target physiological stressors. To maintain a value premium, brands must offer evidence of intervention—providing consumers with the tools to quantify their health and positioning products as essential maintenance for their most valuable biological asset.*

V. Discovery

A. Nonlinear Discovery Journey

Overview: *Discovery is now continuous rather than episodic, requiring brands to operate in an always-in-market mode. Visibility is not just about reach. It is about maintaining enough consistent omni-channel presence across platforms that consumers can repeatedly encounter, verify, and trust the brand over time.*

1. Because discovery is fragmented, nonlinear, and validated across multiple sources, brands can no longer treat it as a discrete stage in the funnel. The average adult internet user now relies on 5.8 different search platforms to discover new brands, reflecting a highly dispersed and always-on discovery landscape (Kemp, 2025).
2. This intense navigational friction directly causes massive transactional dropouts, culminating in a staggering 74% e-commerce shopping cart abandonment rate recorded across the past 3 months (Accenture, 2024).
3. Beauty shopping today spans physical retail, e-commerce, and social commerce, with discovery, validation, and conversion increasingly distributed across channels. Consumers are blending physical and digital experiences, relying on stores for sensory discovery and product trial while turning to digital tools for research and validation. This hybrid behavior is reflected in the fact that 73% of beauty shoppers visited a store in the past year and 54% actively use mobile devices during in-store shopping trips, seamlessly integrating online and offline touchpoints (Sinch, 2022).
4. In this environment, consumers move fluidly across social platforms, search engines, AI tools, review ecosystems, physical retail, and interpersonal recommendations. This complexity means that brands must remain sustained and accessible across channels, ready to meet consumers at different moments of evaluation. As GWI notes, brands must maintain a continued presence across channels to remain credible and accessible at the point of decision (2025).

5. The consumer discovery process is undergoing a fundamental transformation, particularly among Gen Z, where it is increasingly shaped by the convergence of artificial intelligence, social interaction, and experiential engagement.
6. According to *The Business of Fashion*, beauty consumption is evolving into a "social sport," in which discovery is driven not only by algorithmic recommendations but also by community participation and shared digital experiences. This shift signals a move away from traditional, individual search-based discovery toward a hybrid model that blends online exposure with in-store validation.
7. Despite being digitally native, Gen Z consumers continue to value physical retail environments as critical spaces for product trial and evaluation, reinforcing the importance of tactile experience in the decision-making process. In this context, discovery is no longer a discrete stage but an ongoing, multichannel process shaped by both technological mediation and social influence (Griffiths, 2026).

Key Takeaway: *Brands must operate in an always-on model, ensuring consistent presence and messaging across platforms. This requires integrated marketing, retail, and digital strategies that allow consumers to encounter and validate the brand at any point in their journey, allowing continuous engagement both online and in physical retail spaces.*

B. Social Media

Overview: *Consumers are no longer passively absorbing whatever the algorithm surfaces. Discovery is becoming more participatory, selective, and emotionally oriented, which means brands must create moments that feel intentional, resonant, and worth engaging with rather than simply maximizing exposure volume.*

1. Consumers are increasingly pushing back against digital overload and content saturation. Average views per TikTok video were projected to drop 17% in 2026 due to saturation, while 46% of Gen Z say they are actively trying to reduce screen time (Metricool, 2025). This fatigue is contributing to a slower and more selective mode of engagement in which consumers seek experiences that feel more deliberate and meaningful.

2. This behavioral retreat is driven by the fact that social media content velocity has reached a saturation point that inflicts continuous cognitive fatigue on users. This informational overload begins in early childhood development: 40% of toddlers are actively interacting with mobile tablet devices by age 2, and 25% possess independent smartphone ownership by age 8 (Common Sense Media, 2025).

3. This early exposure has catalyzed an intense generational backlash, with nearly half of Gen Alpha in the United Kingdom explicitly stating a preference to grow up in a world entirely devoid of internet connectivity (BSI Group, 2025). Across broader demographics, this structural exhaustion is universal; an overwhelming 85% of the adult population reports feeling chronically and mentally overwhelmed by the relentless volume of online information processing (WGSN, 2024).

4. Social media and influencers have become major engines of product awareness, but their role is stronger at the discovery stage than at the point of final decision. Consumers are increasingly discovering new products and brands through social media, with that share rising to 51% in November 2024, up from 32% in November 2022 (Capgemini, 2024).

C. Influencer Culture

Overview: *Discovery may begin with media exposure, but purchase decisions are often finalized through social proof. This means that brand messaging alone is no longer persuasive enough to close the gap between awareness and action. Consumers want confirmation from people, not just promotion from brands. Social and influencer ecosystems are expanding the top of the funnel and reshaping how consumers encounter brands, but visibility alone does not produce commitment. While influencers may open the door to discovery, declining trust and increased skepticism mean their impact is conditional. Consumers now require layered validation, across peers, reviews, experts, and consistent creator behavior, before converting.*

1. According to Edelman, 60% of consumers now trust what a creator says about a brand more than what the brand says itself, and trust flows more horizontally through relationships and shared experience than through institutional messaging (2025). This horizontal model is also reflected in the fact that 84% of consumers trust friends and family and 80% trust other customers more than traditional brand communication (Edelman, 2025).

2. Recent academic research further reinforces this shift, showing that while social media drives discovery, peer interaction plays a more decisive role at the point of purchase, acting as the mechanism that validates credibility, value, and fit for the consumer (Theocharis, 2025). This influence is especially pronounced for higher-consideration categories, where consumers seek deeper social proof before converting, though the study also finds that peer influence is most impactful in low-involvement purchase contexts and diminishes for luxury or higher-priced purchases (Theocharis, 2025).

3. McKinsey similarly finds that while digital channels dominate discovery, trusted personal voices play a stronger role at the decision point (2025). Together, these patterns show that consumers may encounter products through media, but they often rely on more relational forms of proof to justify action.
4. The share of consumers learning about products specifically from social media influencers also increased, reaching 30% in November 2024 from 21% the year prior (Capgemini, 2024). Influencers and creators have become especially powerful because they make marketing feel more personal, relatable, and participatory. However, growing awareness of sponsored content is reshaping how that influence is received. According to the Better Business Bureau's 2025 Influencer Trust Index, only 27% of consumers say they highly trust influencer recommendations, while concerns around authenticity, disclosure, and financial motivation continue to erode credibility (2025).
5. Over the past year, 39% of shoppers made purchases based on influencer recommendations, up sharply from 21% the year before (Davey, 2026). Their influence is particularly strong among younger consumers, though it is expanding across age groups.
6. Capgemini reports that 45% of Gen Z consumers were influenced by celebrities or influencers in both 2023 and 2024, while the percentage of millennials rose from 32% to 33% and Gen X from 17% to 23% over the same period (Capgemini, 2024). Even so, the rate of purchasing a new product or brand in the past 6 months has remained relatively stable, at 17% in November 2024 compared with 15% in 2023 and 16% in 2022, showing that while social media is accelerating awareness, it does not independently guarantee conversion (Capgemini, 2024).
7. While the value of the influencer market has steadily grown to a $24 billion industry, research from *Harvard Business Review* shows that, while still essential for visibility and awareness, consumer trust is steadily declining. This is reshaping product discovery: Consumers are no longer passively accepting what is surfaced, but filtering discovery through credibility cues, favoring repeated exposure over one-off posts, and authentic, lived-in endorsement over scripted promotion. As a result, influence is shifting from reach to resonance, where products only enter the consideration set when discovery is reinforced over time through consistency and transparency (Duffek et al., 2025).
8. Proprietary quantitative research indicates that paid digital influencers and content creators have suffered a near-total collapse in authority, with only

5.9% of beauty consumers ranking them within their top two trusted sources of product information (FIT CFMM Graduate Program, 2026). This deep trust deficit is closely mirrored by corporate brand advertising, which is trusted by just 6.4% of the consumer base (FIT CFMM Graduate Program, 2026). Modern buyers are actively filtering out manicured brand aesthetics and sponsored talent, breaking the historic influencer marketing monopoly in favor of independent, peer-validated networks.

Field study insights: *Community participation > social influence. As consumers become more aware of paid influence and curated content, trust is no longer passively accepted—it is actively built through participation, peer validation, and ongoing community engagement. Local brands invest in their community and consumer bases, more so than digital marketing or social media advertising. Methods like consumer test-panels (Lakrid) and word-of-mouth and community-based sales platforms (Oriflame/Keune) garner more trust than social influencers. Over-saturation of digital content and paid partnerships has increased consumer skepticism, shifting expectations from passive consumption to active participation.*

Key Takeaway: *Brands must actively cultivate and manage peer ecosystems. This includes investing in reviews, community engagement, creator partnerships, and customer advocacy programs, as these channels play a decisive role in closing the gap between discovery and purchase.*

Brands must rethink influencer strategy from conversion-focused to ecosystem-driven. Influencer content should act as the starting point of discovery, but it must be supported by reviews, expert validation, retail presence, and transparent product information to translate awareness into action.

D. The Role of Search in Discovery

Overview: *Digital discovery now operates in a verification economy, where access to information matters less than confidence in its credibility. Consumers are not simply searching for answers; they are cross-checking, comparing, and filtering for bias, which means brands must assume that every claim will be tested across multiple sources before it is believed.*

1. As consumers spend more time navigating digital spaces, they are becoming less trusting of the platforms that organize information for them. Search engines, sponsored results, and even AI-generated content are approached with skepticism, resulting in the need to verify sources.
2. A 2025 survey found that 76% of consumers believe more than a quarter of Google shopping results appear sponsored or promoted, and only 14% consider those results very helpful (Goodwin, 2025). In the same research, 42% of respondents said Google and other search engines are becoming less

useful, 55% said they get information from their community more than online search platforms, 52% said they use AI chatbots or alternative platforms like TikTok instead of Google, and 66% felt that the quality of information is deteriorating, making reliable sources harder to find (Goodwin, 2025).

3. Broader measures of digital trust reinforce this shift. Only 12% of Americans fully trust search engine results, half trust organic results more than paid ones, and many cite "too many ads" as a major frustration (Page One Power, 2025). Skepticism is especially high among younger groups, with 70% of Gen Z and 65% of millennials reporting that they often fact-check information they read online (Page One Power, 2025). Even where AI is being adopted, trust remains conditional: One in three people who trust AI-generated results still cross-check them for accuracy, and 90% of Americans want AI-generated content to be clearly labeled (Page One Power, 2025).

4. Consumers also continue to prefer breadth over excessive personalization, with one in two saying they want a wider range of viewpoints in search results and news feeds (Page One Power, 2025).

E. Artificial Intelligence as a Form of Discovery

1. Artificial intelligence is fundamentally transforming how consumers discover products and brands, shifting the process from active search to passive, algorithm-driven exposure. According to McKinsey & Company, personalization engines powered by AI now play a central role in shaping consumer journeys, delivering tailored recommendations that influence consideration and purchase decisions.

2. Research from Salesforce indicates that consumers increasingly expect brands to anticipate their needs, with AI-driven interactions becoming a primary mechanism for engagement. This evolution is reinforced by findings, which highlight that discovery is no longer a discrete stage in the purchase funnel but rather an ongoing, dynamic process embedded across digital touchpoints. As a result, AI has emerged as a critical intermediary between brands and consumers, curating information, prioritizing visibility, and shaping perception in real time. In this context, discovery is no longer consumer-led but algorithmically mediated, positioning AI as a gatekeeper that directly influences what consumers see, consider, and ultimately trust (Salesforce, 2025).

    a) Around 39% of all consumers (and over 50% of Gen Z) are already using AI for product discovery (Salesforce, 2025).

    b) Nearly 73% of customers expect better personalization as technology advances.

c) Consumers are expecting more than ever, with 65% expecting companies to adapt to their needs in real time.

d) Over 60% of consumers say AI makes trust more important than ever.

3. However, this systemic reliance on automated curation has created a severe friction point in user experience. As a mechanism for product discovery, generative artificial intelligence functions as a primary driver of consumer confusion rather than clarity. Quantitative data shows that 25.36% of consumers experience active anxiety stemming from the inability to discern AI-generated copywriting from real human reviews (FIT CFMM Graduate Program, 2026). Consequently, generative AI text tools including ChatGPT rank at the absolute bottom of consumer discovery trust metrics, cited by a mere 4.0% of respondents as a reliable product information source (FIT CFMM Graduate Program, 2026).
4. Gen Z is turning beauty into a "social sport," blending AI, community, and shared experiences (Griffiths, 2026).

F. In-Store Experience

Overview: *Despite being a digitally native generation, Gen Z demonstrates a notable preference for in-store shopping alongside digital discovery, reflecting a broader consumer shift toward experiential engagement that transcends the transactional. Consumers are increasingly redefining value beyond the product itself, expecting physical retail spaces to offer meaningful, immersive experiences rather than simply a point of purchase. Yet brick-and-mortar retail continues to fall short of these evolving expectations, with persistent friction across store environments, product availability, and navigation undermining the in-store experience. Shoppers increasingly prioritize autonomy, clarity, and a sense of calm—qualities that many physical retailers have yet to consistently deliver. Compounding this, a growing value-consciousness among consumers, coupled with the rapid pace of beauty trends, has widened the gap between what shoppers expect and what physical retail currently provides.*

1. Despite being digital-first, Gen Z shows a strong preference for in-store shopping alongside digital discovery (Griffiths, 2026).
2. Consumers are redefining value beyond the product itself, placing increasing importance on experiential engagement.
3. Consumers are looking for more than just a transaction, with 82% wishing beauty stores offered experiences beyond simply buying products (ChangeUp, 2025).

4. However, physical retail continues to fall short in key areas, with pain points in physical retail highlighting persistent friction.
5. Stock issues remain the top frustration for in-store shoppers.
6. Beyond inventory challenges, cognitive paralysis has thoroughly contaminated physical brick-and-mortar environments. Primary research shows that 52.5% of beauty consumers frequently or constantly experience severe overwhelm while actively shopping for personal care products, a figure that expands to 84.8% when factoring in occasional occurrences (FIT CFMM Graduate Program, 2026). Within this overwhelmed cohort, 50.10% identify the relentless pace of new brand launches and overcrowded shelves as a direct source of anxiety, while more than one-third of all shoppers report acute, physical "aisle anxiety" (FIT CFMM Graduate Program, 2026).
7. Regarding store atmosphere, 90% of consumers state it is important for a store to feel calm rather than chaotic, and 92% prioritize clear navigation. Autonomy also plays a critical role, as 86% of shoppers value the ability to find what they need without requiring staff assistance (ChangeUp, 2025).
8. Compounding this, regarding value and trend speed, 83% of consumers have become more value-conscious, and nearly half believe that physical retail is failing to keep pace with the rapid speed of beauty trends (ChangeUp, 2025).

VI. Purchase Drivers

Overview: *Shifts in consumer mindset collectively redefine how consumers assign value across the purchase journey. Value is no longer limited to the product itself but also extends to longevity, experience, and credibility. Consumers are behaving more like strategic allocators, balancing immediate gratification with long-term return, whether through resale potential, experiential engagement, or sustainable impact. As a result, brands must move beyond transactional value and build systems that reinforce confidence, reduce friction, and deliver verifiable impact over time.*

A. Peer Evaluations

Overview: *While brands continue to drive awareness, purchase decisions are increasingly shaped by peer, creator, and expert validation, with reviews, recommendations, and real-world experiences outweighing traditional advertising in driving conversion. In this nonlinear journey, consumers navigate a dynamic mix of retail, social, and personal networks—often placing greater trust in physical retail and close social circles than in brand-led or purely digital influence.*

1. Although brands still play a role in shaping awareness, peer and creator validation increasingly determine what consumers actually act on. Social and peer validation often outweigh traditional advertising in converting consideration into purchase.
2. The path to purchase in beauty is no longer linear or predictable. Consumers draw from a dense web of influences: physical retail, social platforms, peer networks, expert voices, and online communities, often moving between them fluidly before forming a brand or product preference.
3. Although social media has become a more trusted source for brand and product recommendations, it may also be overvalued by brands relative to the role it actually plays in consumer decision-making (Edelman, 2025).
4. In fact, consumer research shows that the most popular place for beauty inspiration is still physical retail, followed by friends and family, and then online retail, rather than social media or brand marketing alone (Weaver et al., 2025).
5. To bypass the modern trust deficit, consumers have established a strict, decentralized trust hierarchy that prioritizes organic peer compliance and credentialed medical authorities over corporate messaging (FIT CFMM Graduate Program, 2026). When auditing consumer reliance on informational sources, a clear matrix emerges:

THE DECENTRALIZED TRUST MATRIX

High Trust / High Authority

   1. Direct Peer Networks (73.1% ranked in Top 2 Trusted Sources)
   2. Independent Medical Experts and Dermatologists (55.0% in Top 2)
   3. Verified Native Site/Shopping Product Reviews (35.6% in Top 2)
   4. Organic Subculture Communities / Reddit / Forums (19.9% in Top 2)

   This matrix demonstrates that independent subcultures, independent online forums like Reddit (19.9%), and verified site reviews (35.6%) have structurally replaced traditional media, proving that contemporary consumer verification is entirely decentralized (FIT CFMM Graduate Program, 2026).

6. At the same time, peer-based trust signals carry significant weight: 96% of consumers consider ratings and reviews, 78% look to customer photos and videos, 72% identify family and friend recommendations as a key purchase

driver, and 32% depend on in-store specialists when learning about new beauty products (PowerReviews, 2025).

B. Value Redefined as Return on Emotion

Overview: *The global consumer psyche is shifting from a productivity-driven mindset to a play mandate, as emotional strain and systemic instability redefine what consumers need to function and cope. In this emerging emotional economy, creativity, play, and emotional regulation are no longer leisure pursuits but essential tools for navigating stress and uncertainty. As a result, value is moving beyond the functional utility of products toward the intensity of the emotional experience they deliver. Today, "return on emotion"—driven by anticipation, communal hype, and shared participation in phenomena like drop culture—has become a critical source of connection, meaning, and psychological resilience in an unpredictable world.*

1. Value is increasingly redefined through "small but significant improvements to everyday life," where care, joy, and achievable benefits take precedence over traditional, outward markers of success. This emotional ROI (return on investment) is a critical component of the modern value equation, with nearly half of consumers reporting they are more likely to purchase from brands that provide a tangible sense of joy (WGSN, 2026).

2. However, look closer at the data and you'll find that the concept of emotional value has been radically parsed by the contemporary buyer. Rather than seeking value through pure hedonic pleasure, luxury aesthetics, or superficial sensorial indulgence, consumers define emotional return through the pragmatic lens of psychological stabilization and resilience. This is verified by primary quantitative data: An overwhelming 40.93% of consumers rank the emotional joy or sensorial experience of a product as their *dead-last priority* when making a purchase decision (FIT CFMM Graduate Program, 2026).

3. Instead, emotion manifests as a tool for stabilization during macroenvironmental duress. Quantitative analysis shows that 25.83% of beauty consumers respond to acute external stress by purchasing small "pick-me-up" beauty items to stabilize their mood (FIT CFMM Graduate Program, 2026). Crucially, a cross-tabulation of this segment reveals that 83.1% of these "pick-me-up" buyers (123 out of 148 surveyed consumers) did not reduce their broader beauty expenditure (FIT CFMM Graduate Program, 2026). These purchases are not superficial, compensatory splurges, but strategic, nonnegotiable investments in emotional self-preservation.

4. The urgency is grounded in a changing economic reality: With 60% of future jobs not yet in existence, adaptability and creativity have become critical life skills (Lichtenberg, 2026).
5. Furthermore, as 40% of today's children are anticipated to be self-employed, play is being reframed as the primary fuel for the experimentation and resilience required for future innovation (IKEA, 2024). This shift is already manifesting in the cultural zeitgeist, with media language showing a marked rise in playful, hopeful, and happy tones as consumers seek emotional relief from systemic anxiety (WGSN, 2024).
6. This shift from product ownership to owning moments is redefining the concept of scarcity. In this new landscape, value is derived not from the quantity of a product, but from the emotional intensity and participation surrounding its acquisition.
7. Drop culture has successfully commoditized anticipation and shared hype; for 44% of consumers ages 18–24, limited-edition availability is a primary purchase driver (WGSN, 2025). The act of waiting has itself become a high-value ritual, with 60% of U.S. Gen Z consumers reporting they have waited in line for 30 minutes or more for a specific product, and 74% characterizing the experience as worth it (WGSN, 2025).
8. This indicates that the consumer is no longer just purchasing an item—they are investing in a communal experience that serves as a psychological anchor.
9. To meet these needs, the beauty industry is evolving into a form of dopamine infrastructure. Brands are moving away from traditional productivity-led messaging and toward sensory-led rituals that prioritize joy and wonder as a reset button for the nervous system.
10. By utilizing gamified textures, color-morphing formulas, and high-intensity limited-edition drops, brands can transform routine consumption into a sanctuary of play.
11. Physical retail is also being reimagined as a site for emotional regulation, where the focus shifts from transactional efficiency to low-pressure, high-creativity environments that facilitate emotional unplugging.
12. In this environment, the return on emotion is the ultimate metric of value, as consumers seek products that provide the social connection and psychological resilience needed to navigate an unpredictable future.

13. A broader behavioral shift is changing not just where discovery happens but also how it happens. Discovery is moving away from passive, algorithm-led exposure and toward more intentional, emotionally driven participation.
14. At the same time, emotional relevance is becoming a stronger force in discovery. According to WGSN, 63% of Americans turn to nostalgia when stressed, and 71% say they are more likely to buy from brands associated with their youth (2025). Together, these signals suggest that discovery is becoming more experiential, more emotionally grounded, and more receptive to physical and nostalgic moments that offer familiarity and comfort.
15. Only brands with strong perceived value and performance are winning with Gen Z (Griffiths, 2026).

Field study insights: *Curation adds value. Having an edited assortment with thoughtful merchandising can enhance consumer experience. Rather than arranging by brand or functional benefits, retailers draw inspiration from art, design, and human emotions. Retail designs echo the minimalism seen in home decorating and fashion designs popular within these regions.*

Key Takeaway: *Brands must shift from volume-driven content strategies to quality-driven engagement. This includes investing in experiential retail, storytelling, and emotionally resonant brand narratives that create deeper, more intentional entry points into the consumer journey. Beauty is being redefined as dopamine infrastructure, shifting the value proposition from efficiency-led results to sensory-led rituals that prioritize experimentation and joy. Brands must embrace gamified beauty and experience scarcity to transform products into high-value emotional anchors. By evolving the physical beauty counter into a sanctuary of play, brands can offer a rewarding communal ritual that facilitates emotional regulation and deepens the consumer's investment in the brand ecosystem.*

C. Trialing and Sampling

Overview: *Trialing and sampling serve beyond a tactical marketing tool in today's retail environment, becoming an essential lever and serving as a conversion and trust-building driver. It has become central to product discovery and purchasing behavior, reflecting a shift toward experience-led validation. In beauty, where performance is personal and difficult to assess digitally, sampling reduces perceived risk, accelerates confidence, and transforms passive interest into active intent. It ultimately bridges the gap between awareness and action, turning discovery into trial and trial into purchase, while increasingly serving as a means to secure a lasting place within a consumer's routine rather than just drive short-term conversion.*

1. Sampling is a high-importance lever in beauty, mainly because it reduces risk, builds trust, and drives discovery for the consumer, ultimately leading to a strong conversion rate for brands.
2. It’s one of the most desired shopping offerings in Beauty and Personal Care (BPC) purchases. In the U.S., 45% of BPC consumers say samples are a main area of interest when shopping, with other forms of trial like testers (31%) and mini sizes (28%), following closely behind (Mintel, 2024).
3. A study of 20,000 consumers by Odore found that 75% are more likely to purchase from new beauty brands after sampling their products (Roazen, 2025).
4. When sampling is not available, trial both in-store with testers or online with tools like “virtual try-on” are essential for a majority of consumers.
5. Around 57% of consumers across 30 countries still crave to see, touch, and feel products before buying.
6. Additionally, 32% continue to value the personal service that only in-store shopping offers (Füsting, 2024).
7. The global virtual try-on market size was estimated at $9.17 billion in 2023 and is projected to reach $46.42 billion in U.S. dollars by 2030, growing at a compound annual growth rate of 26.4% from 2024 to 2030 (Grand View Research, 2024).

Key Takeaway: *Trialing and sampling remain one of the most influential drivers of beauty purchasing behavior because they convert uncertainty into firsthand proof. As consumers continue to demand tactile, low-risk ways to evaluate products, whether in-store or through emerging digital tools, brands that enable trial are better positioned to accelerate discovery and increase conversion.*

D. The Growth of Resale

Overview: *The rapid growth of resale and secondary markets reflects a fundamental shift in consumer value systems, where sustainability, value optimization, and post-purchase monetization are becoming central to decision-making. As stigma around secondhand fades—particularly among Gen Z—and adoption scales across both consumers and brands, circular consumption is moving from niche behavior to a mainstream, institutionalized retail model.*

1. The growth of resale and secondary markets signals a fundamental shift in how consumers define value, with increasing emphasis on sustainability, value-seeking behavior, and post-purchase monetization.
2. According to Forbes, “used clothing is the hottest thing in retail. It’s where the next generation of shoppers are: Most Gen Z consumers see no stigma in

buying secondhand, and 40% have bought used clothing, shoes, or accessories, double that of Gen X and Boomers. The distinction between new and used is an old-school distinction that is being erased" (Miller & Washington, 2025).

3. This is further reinforced by the fact that 62% of consumers have purchased secondhand, according to a ThredUp survey (Miller & Washington, 2025).
4. Resale sales grew by $10 billion from 2020 to 2023, and were predicted to grow more than twice as fast as total U.S. retail sales in 2025 (Miller & Washington, 2025).
5. As brands respond to this shift, 163 fashion brands had online resale shops as of April 2024, with the top sales among these coming from American Eagle, Madewell, and Athleta (Miller & Washington, 2025), signaling a broader institutionalization of circular consumption.

Field study insights: *Second-life consideration. The value calculation being performed by the consumer is driven partially by a product lifespan outside of direct usage. Consumers are making fashion purchases with the expectation of future resale (Diana LoGuzzo, Calvin Klein). Brands like Nudie Jeans are normalizing repair over new purchases. Quality is of utmost importance in a "less but better" economic mindset, where consumers are willing to pay more but are expecting the product to last.*

E. The Consumer Sustainability Mindset

Overview: *Sustainability is increasingly central to how consumers define value, but a significant credibility gap is limiting its impact, with many consumers skeptical of green claims and unwilling to pay a premium without clear proof of authenticity. As expectations shift toward brands embedding sustainability by default, transparent, measurable, and verifiable claims—often supported by third-party certification—are becoming critical to building trust and unlocking perceived value.*

1. This evolving definition of value is increasingly tied to sustainability but also shaped by a significant credibility gap.
2. More than half of consumers do not believe most sustainability claims, and nearly half will not pay more because it is too difficult to verify authenticity, highlighting a fundamental barrier to premiumization (Rogers, 2026).
3. At the same time, 61% say they should not have to think about sustainability while shopping.

4. Additionally, 94% believe it is a brand's responsibility to create products that are not harmful, reinforcing the expectation that sustainability should be embedded, not optional.
5. Consumers respond most positively to factual explanations and measurable impact claims, and nearly half find third-party certification useful, especially global standards.
6. While many consumers are open to paying more for sustainable products, skepticism about authenticity directly limits premium acceptance, making proof, transparency, and accountability critical drivers of perceived value.

Field study insights: *Conscious consumption. In the Nordics, sustainability is not a feature—it is the baseline expectation. Refill systems normalized, minimal packaging, no "greenwashing" language—sustainability is assumed rather than shouted. Regulation + taxation, consumer education and a more advanced recycling infrastructure allow sustainability to run deeper in the culture.*

F. How Consumers Determine Value Through Claims, Performance, and Ingredients

Overview: *The consumer is transitioning from a passive recipient of beauty marketing to a self-appointed amateur chemist who views the product label as a syllabus. Value is no longer derived from brand heritage or celebrity endorsement, but from biological veracity—the measurable, scientific proof that a product can alter or protect the skin's architecture. However, a significant literacy gap remains: While 91% of consumers are ingredient-aware, their actual technical knowledge is thin. This creates a reliance on new-age validators (AI, ingredient apps like Yuka, and medical professionals) to act as the bridge between curiosity and confidence, effectively replacing the traditional influencer with the "expert guide".*

1. Gen Z consumers are increasingly obsessed with ingredients and product efficacy (Griffiths, 2026).
2. The modern consumer has transitioned from a passive recipient of marketing to an active, guidance-hungry participant who demands to understand the scientific "why" behind every product claim.
3. This shift toward deep ingredient awareness is a primary driver of value evaluation, as shoppers increasingly research specific components to ensure efficacy, manage allergies, and differentiate between competing formulations (Shell, 2026; Talker Research, 2025).
4. This desire for expert-level knowledge has created a unique literacy gap: While a staggering 91% of consumers claim to be more ingredient-aware

than ever, fewer than half can actually identify the active ingredients in the clinical treatments they receive (Talker Research, 2025).

5. To bridge this gap, younger consumers in particular are turning to AI-driven recommendations and specialized tools like Yuka—currently the top health and fitness app in the U.S.—to verify cosmetic ingredient safety and performance in real time (Mintel, 2026; Lebsack, 2026).
6. This heightened scientific expectation has catalyzed the facialization of the body, where consumers now expect body care to deliver the same molecular sophistication and long-term resilience as facial skincare.
7. Industry leaders note that ingredients once reserved for high-end face serums—such as AHAs, niacinamide, squalane, and probiotics—are now expected across all formats to support microbiome health and skin barrier integrity (Brown, 2026).
8. This convergence of luxury and dermo-cosmetics is further evidenced by a shift in trust away from traditional influencers, whose relevance has declined by 8 percentage points globally over the past 2 years, and toward medical professionals (Weaver et al., 2025).
9. Currently, 45% of luxury beauty shoppers report that their purchase decisions are directly influenced by medical experts, a trend that underscores the consumer's demand for clinical veracity over aesthetic vibes (Aiste Kriauciunaite, 2025).
10. Premium purchases now require a convergence of proof of performance, social validation, and emotional return to justify the initial outlay (GWI, 2026).
11. The longevity consumer treats personal care as a rigorous biological capital investment, completely dismantling historical product validation models built on marketing aesthetics. Quantitative data shows that 41.65% of consumers rank proven clinical efficacy (results) as their absolute number 1 purchase driver, outstripping every other variable (FIT CFMM Graduate Program, 2026).
12. The modern buyer actively rejects superficial premiumization signals (FIT CFMM Graduate Program, 2026). When evaluated on their willingness to pay a price premium for an identical face cream formula packaged in luxurious aesthetics with an elevated scent versus plain, unbranded packaging, the rejection of legacy luxury signals is severe:

Premium Justification for Luxury Sensorial Elements	Consumer Response Percentage

Will Not Pay a Single Cent More	54.42%
Will Pay a Modest 5%–10% Premium	31.98%
Will Pay an 11%–20% Premium	10.60%
Will Pay Greater than 20% More	3.00%

A definitive 54.42% of consumers flatly refuse to pay any premium for experiential luxury elements if the clinical formula efficacy is identical (FIT CFMM Graduate Program, 2026). Consumers are refusing to fund corporate marketing narratives, choosing instead to reallocate their capital directly toward active ingredient performance, advanced molecular delivery systems, and empirical scientific results.

13. The prioritization of performance is clearly reflected in U.S. search data, which highlights a consumer base focused on targeted biological solutions.
14. Anti-acne remains the top priority with approximately 8 million monthly searches, as users seek quantifiable results for pore health and breakout prevention (Cosmewax, 2026).
15. Simultaneously, concerns regarding sensitive skin have generated nearly 1 million monthly searches, driven by lifestyle stressors and environmental exposure.
16. While anti-aging continues to command significant attention—with hundreds of thousands of searches for wrinkles and fine lines—the focus has shifted toward visible, fast, and, above all, safe improvements (Cosmewax, 2026).
17. As active ingredient mentions in new product launches continue to grow at an average annual rate of 7%, it is clear that for the 2026 consumer, the ingredient deck has become the ultimate syllabus for determining a product's true worth (Meintjes, 2025).
18. Expert-backed authority also remains relevant but in a more nuanced way. While 76% of skincare users say dermatologist-backed beauty is important, only 22% say they are strongly influenced by a dermatologist's recommendation when selecting products (Albrizio, 2025). This suggests that consumers do not simply defer to expertise, but instead integrate

expert validation into a wider trust network that also includes peers and creators.

19. Consumers with acne, for example, often look to both dermatologists and social media for skincare recommendations, illustrating how discovery now operates across overlapping sources rather than through a single channel (Bal, 2025).
20. The industry is witnessing the birth of dermo-prestige, a hybrid category where the high-touch experience of luxury meets the clinical rigor of a pharmacy. To maintain a value premium, brands must embrace the facial-ization of the body, treating below-the-neck skin with the same molecular sophistication as facial serums. Furthermore, the current influencer landscape signals a shift from vibe-led to logic-led commerce. Brands that win will move beyond simply listing hero ingredients to explaining the molecular “why” behind their formulations. For a longevity-focused strategy, the greatest opportunity lies in closing the literacy gap: Brands that can successfully educate consumers on invisible biological risks—like microbiome health and cellular resilience—will transition from being a discretionary purchase to an essential biological insurance policy.

Key Takeaway: *Beauty consumers are no longer just purchasing products but rather evaluating them as part of a broader value system that includes experience, longevity, and credibility. This requires brands to design beyond the product—integrating resale potential, immersive retail experiences, and transparent sustainability into their core offering. At the same time, brands must address skepticism by grounding claims in proof, making sustainability effortless, and ensuring that value is both tangible and emotionally resonant. Winning brands will be those that balance performance with experience, and aspiration with accessibility, creating ecosystems that support both immediate desire and long-term investment. Brands must operate with radical transparency. Claims, ingredients, and performance must be easily verifiable across multiple platforms. Consistency in messaging and proof is critical, as any discrepancy can quickly erode trust in a highly skeptical environment.*

VII. Strategic Recommendations for Brands

To successfully capture and retain the loyalty of the longevity consumer, the industry must transition away from legacy marketing paradigms and structurally align with the four core psychological and biological needs uncovered across our macroenvironmental and quantitative research.

A) Mitigate Uncertainty Through Sovereign Emotional Comfort: Brands must actively respond to the pervasive anxiety of an unpredictable macro-environment by engineering low-stakes, highly customizable product frameworks that return immediate environmental control and domestic curation directly to the consumer. Develop modular product architectures that permit users to independently customize concentrations and active boosters based on their daily bio-readouts. Reframe marketing narratives away from superficial maintenance and explicitly position the daily routine as an unshakeable, grounding sanctuary ritual.

B) Solve for Milestone Erosion by Anchoring to Biological Health Span: As traditional socioeconomic milestones and institutional roadmaps dissolve, brands must completely abandon linear, age-based marketing timelines and replace them with fluid narratives that validate self-directed, nontraditional life structures. Construct physical, localized, brand-adjacent communities that focus on education, longevity optimization, and collaborative personal development. Because the “resilient realist” recognizes external financial systems are fundamentally volatile, pivot corporate communications to position biological vitality, cellular integrity, and long-term health span as the ultimate secure personal assets that the individual can entirely own, govern, and defend.

C) Alleviate Cognitive Fatigue via Radical Minimalism and Absolute Truth: Directly combat the e-commerce confidence crisis and physical "aisle anxiety" by executing aggressive portfolio consolidation and radical informational restraint, returning valuable mental bandwidth to the consumer without sacrificing high-performance results. Implement a strict minimalist approach across product line development, transitioning away from complex, multistep routines toward multifunctional, hyper-potent single-dose delivery systems. Permanently resolve the consumer's "What is real?" crisis by implementing an uncompromised policy of radical transparency, providing clear labeling detailing the precise utilization of artificial intelligence across all brand assets.

D) Optimize for the Asset Class Mindset by Amplifying Clinical Ecosystems: To effectively capture the resilient realist and the young, high-performance optimization demographics, product pipelines must be structurally engineered to integrate with and extend advanced medical and biotechnological interventions. Formulate specialized topical solutions explicitly engineered to extend the clinical lifecycles, preserve tissue integrity, and amplify the physiological results of advanced medical interventions, including GLP-1 therapies, neuromodulators, and clinical body treatments. Shift product validation protocols entirely toward objective scientific benchmarks, providing consumers with open-access data sheets and quantifiable biomarker testing kits.

VIII. Conclusion

In 2026, the consumer landscape is defined not by declining demand but by a fundamental shift in how value is evaluated and how purchase decisions are made. In an age of economic constraint, institutional skepticism, and persistent uncertainty, consumers are becoming more intentional, risk-aware, and selective, prioritizing purchases that deliver tangible, everyday value rather than abstract or aspirational benefits.

The path to purchase has become increasingly complex and nonlinear. Discovery now occurs across a fragmented ecosystem of AI-driven recommendations, social platforms, peer networks, and physical retail, requiring repeated exposure and validation before action is taken. In this environment, awareness alone is insufficient. Trust has emerged as the critical condition of conversion, enabling consumers to confidently allocate their time, money, and attention.

This shift is particularly pronounced in beauty and wellness, where products are increasingly evaluated as investments in longevity, self-optimization, and resilience. As a result, mechanisms such as trialing, sampling, and experiential validation have moved to the center of the consumer journey, allowing individuals to verify performance and integrate products into their daily routines before committing to a full-size purchase.

Ultimately, a new consumer mindset is emerging, one that is intentional, skeptical, and future-oriented yet grounded in the pursuit of meaningful, everyday impact. For brands, the implication is clear: Success depends not on capturing attention alone but also on earning sustained relevance. This requires delivering consistent, demonstrable value in the everyday lives of consumers, transforming products from discretionary purchases into trusted tools that support daily function, confidence, and long-term well-being.

IX. Appendix

A. Trust in Institutions

Overview: *The role of trust is being redefined within the consumer value system. Rather than a soft brand attribute, trust must be a core infrastructure to brands, enabling consumers to confidently allocate their time, money, and attention. Brands are being evaluated not by just what they sell but also on how effectively they de-risk decisions, validate choices, and support long-term self-investment. In a landscape where consumers behave as investors, carefully allocating resources toward their long-term well-being, trust is what enables action. As a result, brands are no longer evaluated solely on what they promise but also on how consistently they deliver, prove, and reinforce confidence over time.*

1. In a landscape defined by systemic instability, declining institutional confidence and heightened personal accountability, the role of brands has fundamentally shifted. Brand power is no longer derived from authority, scale, or efficiency but rather from emotional trust, empathy, and alignment with the consumer's lived reality. As consumers take on the role of investors in their own biological and emotional capital, they increasingly seek brands that act not as sellers but as stewards of their long-term well-being. This shift is underscored by widespread

skepticism, with 61% of global consumers expressing grievance toward businesses and governments, signaling a breakdown in traditional sources of authority and a reallocation of trust toward more human, responsive entities (Edelman Trust Barometer, 2025).

2. This defensive pivot toward personal sovereignty is a direct result of a profound crisis of institutional legitimacy across domestic socio-political and economic structures. Beyond labor anxieties regarding automation, the modern public operates in a state of deep civic disillusionment. A striking 84% of the domestic public states that American democracy is either in an active state of crisis or facing severe systemic challenges (Lentini, 2025).

3. This structural fracture is further validated by the reality that approximately one in three citizens assert that foundational federal elections are no longer free or fair (Lentini, 2025). Because external macrosystems fail to provide baseline stability or a reliable social contract, the consumer actively rejects institutional authority, choosing instead to locate trust strictly within peer-validated communities and verified scientific data.

4. In this environment, trust is not assumed; it must be continuously earned through service, transparency, and emotional intelligence. The functional aspects of a brand such as product efficacy, convenience, and even price are no longer sufficient on their own; instead, consumers reward brands that demonstrate care, responsiveness, and understanding of their deeper needs. This is reflected in their behavior: 96% of consumers report that customer service plays a role in brand choice and loyalty (Microsoft, 2017); while those who feel emotionally connected to a brand drive significantly more value to the brand by purchasing more frequently and through more active brand advocation (Magids et al., 2015).

5. Even perceptions of leadership have evolved, with consumers associating hope more strongly with effective leadership than traditional markers like authority or stability. This signals that in the coming years, trust becomes a form of risk mitigation that brands must capture before any perceived value can be earned.

6. As a result of the shifting validation of trust, loyalty is becoming more difficult to earn and is continually being reevaluated by the consumer and therefore even more difficult to keep. As consumers are viewing their purchases more as investment decisions than impulse, loyalty programs and brand ecosystems function less as rewards and more as mechanisms for validation and reassurance. With 63% of consumers stating that loyalty programs influence

their purchasing decisions, these systems signal not just value but also an ongoing partnership between consumer and brand (Burns et al., 2024).

7. Consumers are not returning to brands out of convenience; they are reaffirming trust in brands that have consistently delivered on both functional and emotional expectations. Loyalty, in this sense, becomes less about retention and more about compounding trust over time.
8. At the same time, the rapid proliferation of AI-generated and highly-polished influencer content has created a movement toward authenticity, imperfection, and human expression. As consumers grow increasingly adept at identifying manufactured narratives, overly curated or overly scripted brand communications risk eroding credibility rather than building it. Messiness in tone, format, or storytelling has emerged as a powerful signal of authenticity and relatability. This reflects a broader recalibration of value: In a world where perfection is easily fabricated, realness has become a valuable commodity (Mercante, 2026).
9. This shift has significant implications for influencer and creator partnerships. Authenticity is now the primary currency of trust. Consumers evaluate creators not just on reach but also on consistency, transparency, and alignment of values.
10. For brands that want to gain the maximum value from their collaborations with mega-creators, they must allow the creator to be their authentic self, treat them like specialists and as an extension of their creative team. In order to maintain the creator's authenticity, brands must not overly dictate creative style (ScienceDirect, 2024).

Field Study Insights: *Trust is built collectively. When social safety nets allow individuals to feel that the government is working for them and addressing their basic needs, they in turn place trust in the institution. Taxes in the region are high, but basic human needs like healthcare, childcare, and elderly care are heavily subsided, if not free. Policies are written with individuals and families in mind first, not companies.*

Key Takeaway: *Beauty consumers are not just buying products; they are investing in their appearance, confidence, and long-term skin and hair health. This raises the bar for brands to function as credible and trusted partners. Brands must balance their credibility with authentic, human communication and appear approachable rather than overly engineered.*

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