

# ATTITUDES TOWARDS LUXURY BEAUTY – GERMANY – 2023

Almost half of Germans use prestige BPC brands. We reveal three core luxury BPC consumer typologies: Quality Seekers, Bargain Hunters and Premium Enthusiasts.



Franziska Kartheus,  
Associate Analyst



# Attitudes Towards Luxury Beauty – Germany – 2023

## This report looks at the following areas:

- Types of brands used for BPC categories, with prestige being most important in fragrance, followed by colour cosmetics
- Types of brands purchased for oneself and someone else, showing the opportunities for prestige beauty gifting
- Purchase channels for premium/luxury BPC products, with many shoppers choosing online retail for convenience, but opportunities for experience-led in-store shopping
- Features that make a luxury BPC brand stand out, with exclusivity being the factor most associated with luxury
- Interest in premium-/luxury-branded BPC products, highlighting the importance of fragranced, long-lasting and natural products
- Attitudes towards BPC products, including Mintel's key luxury shopper typologies: Quality Seekers, Bargain Hunters and Premium Enthusiasts



Almost half of Germans use prestige BPC brands. We reveal three core luxury BPC consumer typologies: Quality Seekers, Bargain Hunters and Premium Enthusiasts.

## Overview

While Germany has experienced high inflation in recent years, high earners have maintained their spending power and interest in luxury beauty. Some brands have shifted their attention towards a high-end portfolio to attract this clientele. For Mintel's Premium Enthusiasts consumer typology, BPC is a gateway into the world of luxury. These consumers are looking for

**BUY THIS REPORT NOW**


**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

**MINTEL**

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.



affordable luxuries and can be catered to with different size options and premium ingredients/formulas.

Beauty dupes pose a threat to luxury brands as [half of BPC users/buyers aged under 45](#) think more affordable copies of luxury products provide the same experience as the original ones. Prestige brands have found creative ways to address this issue. Taking an educational approach, in line with German shoppers' desire to research prestige products before buying, will help to prove the value of premium BPC products.

The craving for experiences creates opportunities for prestige stores, such as multisensory spaces that invite shoppers to browse and explore the products that they will be eager to share on social media. Create highly exclusive experiences for luxury shoppers to stand out through uniqueness.

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

## Report Content



### EXECUTIVE SUMMARY

- The five-year outlook for luxury beauty

#### Market context

- A decrease in real wages forces some to shift priorities
- Online luxury shopping is thriving but poses challenges
- Exclusivity stands out in prestige BPC

#### Mintel predicts

- Prestige beauty is going green(er)
- High-end luxury is thriving
- Digital natives redefine luxury

#### Opportunities

- Lead with experiences
- Leverage online and offline channels to reach different target groups
- Use beauty as a luxury gateway for aspirational shoppers
- Convince purchasers through efficacy

### MARKET DRIVERS

#### The German economy

- Stagnation follows a technical recession
  - Graph 1: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure
- High earners will maintain spending power
  - Graph 2: gross monthly income of full-time workers, 2022

#### The BPC retail landscape

- Brick and mortar remains essential...
  - Graph 3: purchase of premium/luxury BPC products in store vs online, 2023
- ...but online retail eases access to luxury

## WHAT CONSUMERS WANT AND WHY

### Types of BPC brands used and bought

- Prestige has the highest penetration in fragrances...
  - Graph 4: types of brands used for hair and body BPC, by product users, 2023
- ...and in makeup
  - Graph 5: types of brands used for facial BPC, by product users, 2023
- The appeal of buying fragrance online
- The sound of fragrance
- Younger people are most interested in prestige BPC
- Reach consumers who don't have access to prestige stores
- Subscriptions open the doors for new demographics...
- ...and offers opportunities to customise
- A quarter of Germans buy premium/luxury BPC
  - Graph 6: types of BPC products purchased by product buyers, 2023
- Make gifting easy
- Parents who buy for others are looking for convenience

### Purchase channels for premium/luxury BPC products

- In-person sales remain essential
  - Graph 7: purchase channels for premium/luxury BPC products, 2023
- Make online shopping premium through perks
- Innovation through technology opens at-home opportunities
- Shoppers crave the in-person experience
- Slow it down in store
- Turn shopping into an adventure
- Hyper-luxe experiences for the have-it-alls

### Features that make luxury BPC brands stand out

- Exclusivity leads luxury appeal
  - Graph 8: attitudes towards standout factors for premium/luxury beauty and personal care brands, 2023
- Exclusivity stands out
- Quality centres around effective formulas
- Choose hero ingredients that stand out and convey expertise
- Prestige shoppers expect packaging that stands out
- Make refillable cosmetics a treasured option
- Experiment with style
- Personalising skincare to mitigate skin concerns

# Attitudes towards Luxury Beauty – Germany – 2023

---

- Graph 9: number of skin concerns that Germans experience, by generation, 2023
- Put sustainability at the core of luxury beauty

## Interest in premium/luxury BPC products

- Buyers want the full package
  - Graph 10: interest in premium/luxury branded BPC products, 2023
- Highlight the use of natural ingredients
- Green chemistry as a sustainable option
- Target skin concerns with active ingredients
- Germans want nicely scented, natural and long-lasting products
- Leverage the expertise of beauty professionals
- On social media, balance luxury with relatability
- Inspiration from TikTok: #MyShadeMyStory

## Attitudes towards BPC products

- Germans want to know what they are getting for their money
  - Graph 11: select attitudes towards BPC products, 2023
- Transparency boosts confidence: Germans do their research before buying
- Taking the advantages of online shopping offline
- Shops need to bridge the desire for experience and the need for convenience
- Germans are budget conscious
  - Graph 12: further attitudes towards BPC products, 2023
- Treat-sized luxuries provide an entry level
- Cater to the luxury shopper on a budget
- Highlight the superiority over imitators
- Luxury beauty consumer typologies
- Characteristics of luxury beauty consumers
  - Graph 13: luxury beauty consumer groups, by factors that make a premium/luxury brand stand out, 2023
- Premium Enthusiasts (27%)
- Quality Seekers (27%)
- Bargain Hunters (21%)

## LAUNCH ACTIVITY AND INNOVATION

- The prestige market is fragmented
  - Graph 14: launches in the prestige BPC market, by the 10 most active ultimate companies, 2022-23
- Luxury brands expand into new categories
- Brad Pitt's skincare line aims to capture men's attention
- Prestige/luxury BPC launches remain mainly steady

# Attitudes towards Luxury Beauty – Germany – 2023

---

- Graph 15: prestige/luxury brands as a % of BPC launches, by select categories, 2021-23
- Fragrance prices creep up
- Prestige/luxury brands lead in refillables
  - Graph 16: BPC launches in refillable packaging, by price positioning, 2019 and 2022
- Across all categories, luxe packaging is designed to be used ad infinitum
- Natural ingredients are prominent in luxury BPC
  - Graph 17: BPC launches with natural claims, by price positioning, 2019 and 2022
- Luxe brands reach – or come close to – the 100% natural ingredient ideal
- Higher prices warrant long-lasting results
  - Graph 18: BPC launches with a long-lasting claim, by price positioning, 2019 and 2022
- Makeup that lasts

## Advertising and marketing activity

- Goodbye social media campaigning; hello exclusive group facilitating
- Prada in colour (cosmetics)
- Armani in Fortnite
- Clarins entered the virtual space with an NFT launch
- Embracing AI for an innovative image
- Digitalising bath time
- Clinique x Kate Spade
- Charlotte Tilbury x Disney

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Generation groups
- Consumer research methodology
- A note on language

# About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

## What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

## How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850