

Customers Want Beauty Brands to Prove Their Worth

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Across the globe, one thing unites customers of all income levels: even those that are not price-sensitive are still value-sensitive.

Mass beauty players are gaining ground, as accessibly priced beauty brands have proven they can challenge pricier counterparts on efficacy, innovation and virality, raising consumer expectations across the market. Today, 63 percent of consumers say they do not think premium beauty brands are higher-performing than mass brands.

Four major shifts are contributing to the success of mass players:

Elevated Product

Challenger mass brands such as E.l.f. Beauty adopt similar codes to prestige brands like popular ingredients, attractive packaging, high performance and scientific claims. This is enabled by access to advanced formulations through scaled contract manufacturing and turnkey solution providers. Meanwhile, the global rise of K-beauty — positioned as high-efficacy skincare, often at accessible price points — continues to build consumer trust in mass and masstige offerings.

Increased Availability

Non-core beauty retailers — including mass retailers, grocers and discounters — are actively expanding their offerings in beauty and broader personal care, mainly in mass. Mass brands have embraced e-commerce and fast-growing platforms like Amazon and TikTok Shop. Speciality beauty



retailers are adding lower-priced products to serve full beauty routines and attract broader audiences, while hypermarkets, drugstores and discount retailers such as Target, Rossmann and Action are investing in private-label beauty — often giving these lines preferential merchandising in stores.

Broader Visibility

Mass brands excel at driving viral trends on platforms like TikTok, Instagram and Xiaohongshu, reaching broad audiences and appealing to Gen-Z customers in particular. Top affordable brands are maximising influencer ecosystems and user-generated content across platforms such as YouTube to target new consumers authentically. Lower price points give mass brands flexibility to embrace playful, approachable messaging that resonates with consumers.

Increased Consumer Attention

Newer beauty consumers, including Gen-Z and men, favour mass brands for accessible pricing and wide availability — 39 percent of global male consumers list a mass brand as their favourite brand, compared to 32 percent of female consumers. Nearly half of global consumers enjoy deal-hunting in beauty, benefitting the mass category, while high inflation has boosted affordable brands as shoppers seek novelty at low price points.

Mass brands are frequently purchased, but high-end brands still demonstrate aspirational allure

According to the McKinsey Beauty Consumer Survey 2025, more customers say mass brands are their most-purchased brands than those who say mass brands are their favourite, suggesting higher-priced players can still maintain an edge. This pattern is consistent across skincare, haircare, colour cosmetics and fragrance.

Skincare

61%

— of global consumers who list a mass brand as their most-purchased skincare brand

47%

— of global consumers who list a mass brand as their favourite (most admired) skincare brand

Mass skincare brands such as Bubble invest heavily in social listening to quickly deploy trending products into retailers, allowing for rapid scale while retaining brand identity.

Other leading labels like The Ordinary sought to disrupt the notion that low price equals low efficacy. Premium brands can compete in this space via increased transparency around claims, clinical trials around superior performance or new ingredients.

Haircare

73%



— of global consumers who list a mass brand as their most-purchased haircare brand

65%

— of global consumers who list a mass brand as their favourite (most admired) haircare brand

Haircare has historically been led by mass brands, with limited brand buzz or consumer excitement.

There is a fresh opportunity for premium brands in the category as consumer may become willing to spend more and are focused on targeted solutions for specific hair needs, like hair loss or scalp care.

Challenger brands like K18 tap into the budding demand for specific and efficacious solutions at higher price points through innovation.

Colour Cosmetics

43%

— of global consumers who list a mass brand as their most-purchased colour cosmetics brand

27%

— of global consumers who list a mass brand as their favourite (most admired) colour cosmetics brand

Category disruption is being led by masstige brands, with affordable players like Kiko Milano gaining share.

Social virality and innovations such as skincare-infused makeup or playful textures can give prestige brands a boost.

To increase repeat purchases, prestige brands can explore smaller — and therefore cheaper — formats, more limited editions, sampling and better direct loyalty programmes.

Fragrance

16%

— of global consumers who list a mass brand as their most-purchased fragrance brand

10%

— of global consumers who list a mass brand as their favourite (most admired) fragrance brand

In perhaps what is considered the most emotionally driven segment, consumers have a natural affinity for prestige, luxury, fashion and niche fragrance brands.

Less high-end brands like Sol de Janiero and Bath and Body Works have also grown in popularity, since lower prices enable repeat purchases that tie into today's scent layering trend.



The positive perception of “dupes” from new entrants like Dossier creates additional growth opportunities in mass.

Demand for affordable skincare and colour cosmetics is rising

A push for affordability is most pronounced in skincare and makeup, where mass and masstige brands in both categories have been taking market share from other price tiers in nearly all markets except China over the last five years.

In early 2025, around a quarter of all global consumers said they have traded down to less expensive beauty products over the last year. This trend is only set to accelerate amid slowing growth and a challenging economic environment globally. But this signals more than just cost-cutting. Many customers are not price-sensitive as much as they are value-sensitive — though differentiating on value is increasingly difficult in an era of dupes and discounting.

Higher-priced brands should think of creative strategies that allow them to open the aperture to price-sensitive customers, such as mini or travel-size editions, a lower-priced product such as lip balm, hand cream or eau de toilette spray, or increasing sampling in their retail network to ensure more customers try their products. All the while, existing customers should be retained through high-touch client care like targeted promotions and excellent customer service.

‘Dupes’ are likely here to stay, requiring higher-priced brands to demonstrate clear value

Amplified by inflation and perceptions of products being overpriced, “dupes” (products that either directly or indirectly imitate premium items at a lower price) will likely continue to appeal to consumers. Over 50 percent of surveyed global consumers say they are open to buying them — rising to nearly 60 percent for colour cosmetics. Nearly a third say they have consciously bought dupes.

To differentiate their position against dupes, premium brands must deliver true distinction and meaningful innovation, offering high-performance products that create stickiness for consumers. The quality of dupes is a concern for 50 percent of surveyed consumers.

Benefits like longer-wearing effects, science-backed clinical trials and transparency of ingredient quality should be communicated directly to shoppers. Sensorial elements also matter to consumers, such as a product’s application, texture and smell, while elevated packaging can help sell items in a self-service environment such as Sephora.

In January 2025, Charlotte Tilbury launched a global brand campaign called “Legendary. For A Reason” in response to an onslaught of dupes of its popular premium cosmetics, such as Hollywood Flawless Filter and Film Star Bronze & Glow. “I am an artist, I’m a founder, I’m a president, I’m a control freak ... When I created the Hollywood Flawless Filter, that [kind of] product had never existed in the beauty industry,” she told BoF in an interview.

“Product is king ... then you have these different dupes that are trying to pretend that they’re the same thing, [they] are duping the consumer... We just launched a Legendary campaign, as these products are iconic for a reason. They’re number one in every market because they perform so much



better — sorry, honest truth — than anyone else. Sometimes I invent a category; sometimes I reinvent a category. Without innovation, you have no industry.”

Sensory appeal and design can drive consumer attachment

Beauty is an emotionally driven category. With product performance now a baseline expectation — half of global consumers say they conduct extensive research before purchasing — value is also judged according to sensory, functional and design elements.

Proprietary analysis of online consumer reviews of select hero beauty products suggests a link between the product experience (including design, formulation texture and scent) and emotional attachment. Higher-priced hero products achieved a higher score than the mass products studied, indicating that prestige players need to deliver on these dimensions to differentiate.

Even so, there are cheaper brands that demonstrate a similar level of design appeal and emotional connection; customers rate mass brand E.l.f. Beauty’s Power Grip Primer highly for its functionality and appealingly sticky texture, which the brand emphasises in its marketing, most notably in its 2023 Super Bowl campaign.

The need for design differentiation is highest for premium brands. For example, US prestige makeup brand Merit has made design a core element of its identity. The brand explains its design process and shares packaging and in-store gondola blueprints on social media, creating a cohesive brand image.

Even simple elements of functionality are paramount. Pumps that get clogged, packaging that shatters or text that rubs off bottles are common pain points that can undermine a product.

Uncertainty around global tariffs may make it more expensive for high-end brands to produce state-of-the-art packaging. While shoppers may be reluctant to pay more for packaging alone, a higher price tag raises expectations across all aspects of the product.

How should executives respond?

Understand how perceptions of “value for money” vary among target customers — for example, absolute price, cost per use or impact per dollar.

Emphasise unique signifiers of value and consider building hero franchises around them. Factors such as sensorial appeal and functionality can help justify a higher price point.

Create accessible price points — even for high-end offerings — such as entry-level items, mini versions of popular products or gift sets.

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