This report looks at the following areas:

• The impact of the cost of living crisis on the beauty and personal care sector and how savvy shopping consumers are adapting
• Channels used to shop for beauty and personal care goods and which retailers they use
• Key strategies adopted by consumers to cut back on beauty and personal care spending during the cost of living crisis
• Attitudes of beauty and personal care shoppers towards areas of innovations among retailers.

Post-pandemic, the specialist beauty retailers in France are gaining momentum and grew sales by 20% in 2022. Higher prices played a part, but the return to work and socialising has increased demand and a lot of spending has been redirected back to stores.

As a partly discretionary category, BPC is vulnerable to the effects of the cost of living crisis on consumers. Many are cutting back and reprioritising, with implications for more premium beauty retailers. However, the squeeze also opens up opportunities. Brand perceptions have changed and people understand that own-label does not necessarily equate to poor quality or reduced performance. There is also potential to promote elements such as durability and multi-functionality of products, and the positive aspect of more sustainable and simpler beauty routines.

The online channel received a major boost during the pandemic and the options for shoppers are diversifying, eating into the share of the store-based specialists. Thanks to the marketplace model, people can now buy easily beauty products from generalists such as Amazon and fashion retailers like Zalando. Many beauty brands are selling DTC via their own websites, and even pharmacies are moving online. The grocery channel too is capturing more spending, thanks to own-label development and the launch of more masstige products, which promise premium style products at accessible price points.

"The beauty retail sector in France was heavily penalized by the health crisis, but looks to be regaining momentum. The end of obligatory face coverings, the return to face-to-face working and growth in tourist numbers have all had a positive effect on demand for beauty products."
- Natalie Macmillan, Senior European Retail Analyst, March 2023

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The beauty sector thrives on innovation and new products. Retailers should be looking to the future in terms of how to establish and maintain contact with customers. Technology is enabling colour matching and skin analysis even online, and providing fun and engaging ways to experiment in-store. Social commerce is growing rapidly, and influencers have enormous power, especially with the youngest generations. Areas such as the metaverse and AR/VR may not be as far away as they seem and progressive retailers need to be keeping abreast of trends and developments here.
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