



The New Consumer Reality

Insights and Strategies for Shifting Markets





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Price Sensitivity, Brand Loyalty, and Purchase Triggers

An Overview of Emerging Consumer Trends

Why this study?

Changing consumer habits, rising living costs, and a growing awareness of the right balance between price and quality have intensified competition for customers.

But how exactly do these shifts impact purchasing decisions? In which categories does price matter most? Where does quality remain a key factor? And what does this mean for brands navigating between these two priorities?

Our study explores how consumers make purchasing decisions today, what influences their behavior, and which long-term trends are emerging. The findings offer a nuanced view of current consumer dynamics – revealing where manufacturers and brands must adapt to stay aligned with evolving expectations.

This paper provides a well-founded overview of the consumer landscape in Germany. For industry-specific insights, feel free to contact us at contact@statistaplus.com.

Which Product Categories Were Examined?

To gain a comprehensive understanding of purchasing behavior, we analyzed ten product categories. The selection includes both everyday consumer goods and long-term investments, allowing for a nuanced analysis of different purchasing decisions:



Automotive



Building & Home Improvement



Household Appliances



Cosmetics & Personal Care



Food & Beverages



Furniture & Home Décor



Fashion & Apparel



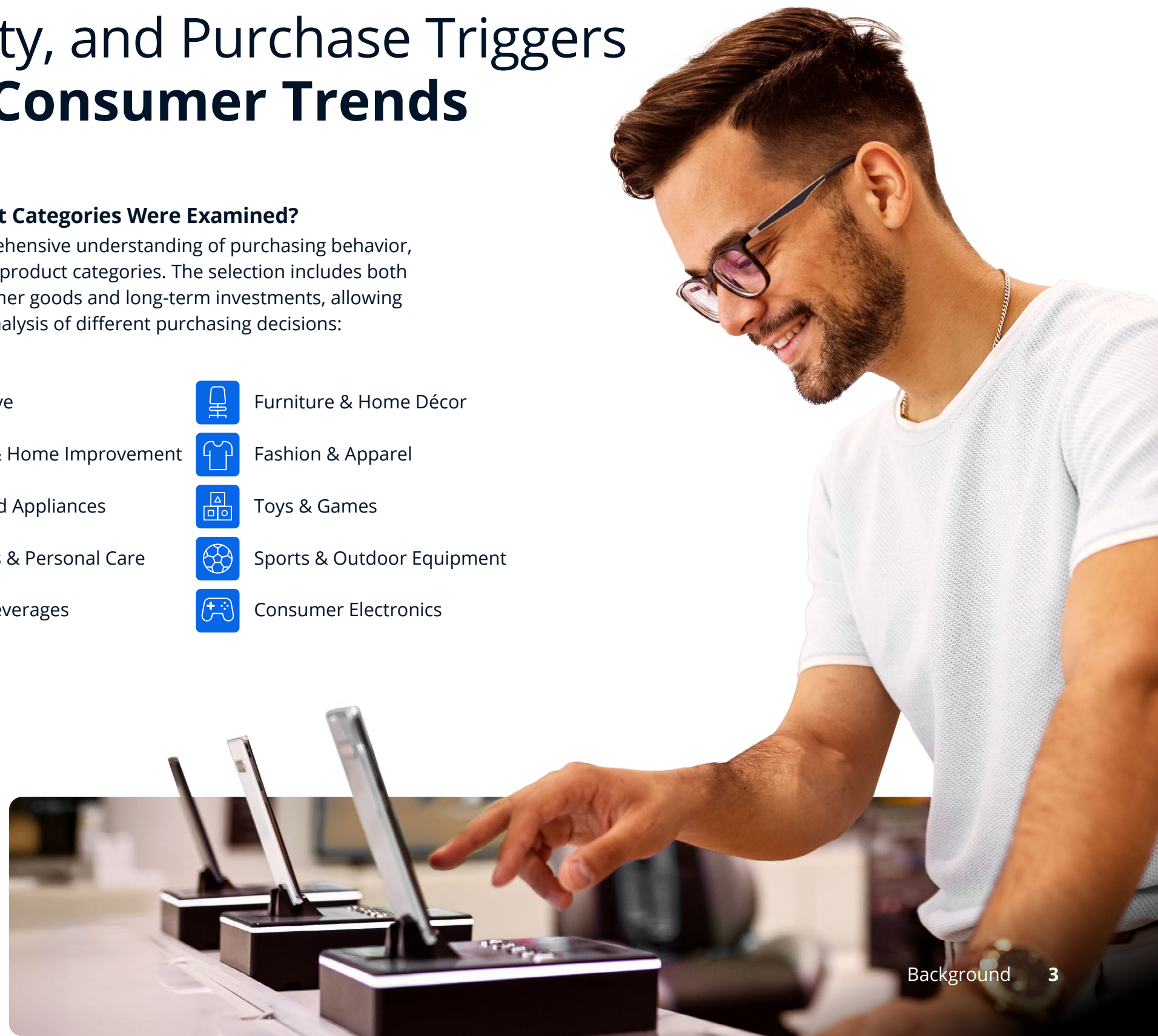
Toys & Games



Sports & Outdoor Equipment



Consumer Electronics





STUDY METHODOLOGY

Survey Method

Online survey with a representative starter sample based on age, gender, and federal state; fieldwork conducted in cooperation with PureSpectrum.

Target Group

Individuals aged 18 and older who made a purchase in at least one of the examined product categories within the past two years.

Participants
n = 3,000

Survey Period
December 17, 2024 –
January 10, 2025

Survey Region
Germany

Three Distinct Consumer Profiles

To analyze purchasing decisions in a targeted way, consumers were divided into three groups based on their self-assessment. This segmentation highlights where price considerations dominate, where quality and premium expectations take priority, and when a balanced price-performance ratio is the key factor.

The Three Profiles at a Glance:



Price-Conscious

Prefers low-cost alternatives such as private labels or no-name products.



Quality-Focused

Prefers branded products and the highest possible quality, regardless of price.



Balanced

Seeks good value for money, often choosing mid-range price segments.

How to Interpret the Results

As part of the survey, participants were asked to assign themselves to one of the segments based on their purchasing behavior in the respective category. As a result, responses to certain questions add up to 100%. With an even distribution across segments, each share would be approximately 33%. Deviations from this baseline can already indicate clear tendencies:

- **≥40%:** Strong focus – this segment dominates purchasing decisions.
- **≈33%:** Even distribution across segments.
- **≤26%:** This segment plays a minor role in this area.

In addition to current purchasing behavior, participants were also asked about their expectations for the coming year. These serve as the basis for the forecasts presented in our analysis.

Executive Summary

Key Findings



Price vs. Quality

Price sensitivity is rising, particularly in the food, cosmetics, and fashion sectors. While durable goods remain driven by quality, consumers are becoming **increasingly price conscious**.



Brands Under Pressure

In everyday categories, brand relevance is declining. Consumers are shifting their focus toward price or premium quality, leading to a shrinking mid-market segment. Brands positioned around a balanced price-performance ratio (mainstream) face **increasing challenges**.



Shifting Purchasing Behavior

The line between planned and impulse purchases is becoming **increasingly blurred** – accelerated by digital shopping experiences and social media.



Flexible Consumer Choices

Consumer decisions vary by product category – sometimes price-driven, sometimes quality-focused, or striking a balance between both.



Demographic Patterns

Younger consumers prioritize trends and premium products, while older shoppers focus more on value for money. Lower-income households are particularly sensitive to rising prices.

RELEVANCE FOR BUSINESSES

Strategic Focus Is Essential for Brands: While price-conscious consumers have more affordable alternatives than ever, quality-driven buyers expect real added value – delivered through innovation, service, or exclusive offers.

Digital Purchase Triggers Demand Agility: Online channels are driving purchasing decisions across all price segments. Even high-ticket items like household appliances and cars are increasingly bought online – companies must adapt accordingly.

Winning Strategies Start with Data-Driven Insights: Brands that analyze purchasing behavior through data can identify trends early and make targeted decisions. This study provides a fact-based foundation for strategic planning for brands, manufacturers, and retailers.

01

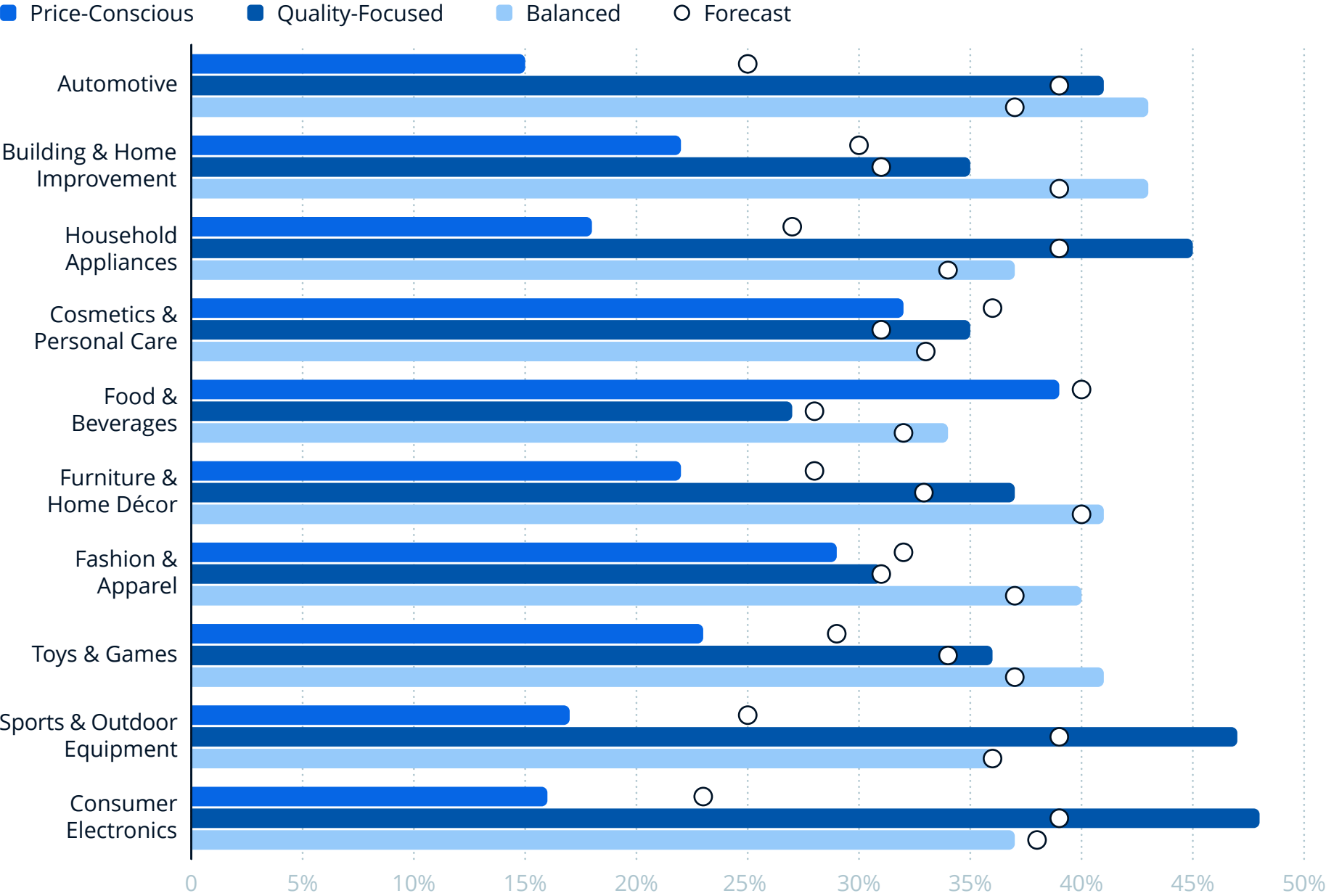


Price vs. Quality

How purchasing decisions are shifting

Rising living costs, economic uncertainties, and shifting consumer habits are measurably influencing purchasing decisions – but not in the same way across all categories. While price is becoming increasingly important in some segments, quality remains the key factor in others. A growing preference for discount options is particularly evident in fast-moving everyday goods. And even for long-term investments, price is playing an increasingly pivotal role.

Figure 1 Price or Quality: What Matters Today and in the Future?*



*Survey questions: How would you currently describe yourself as a customer when it comes to your purchasing decisions in the following categories?
What do you expect your purchasing behavior to look like in these categories in the future?

**Saving Over Brand Loyalty?
Where Price Takes the Lead**

Price sensitivity is steadily increasing for every-day products, and in some categories, price has already become the dominant decision factor. 39% of consumers prefer lower-cost alternatives over premium brands when buying food. A similar trend is emerging in the cosmetics sector, where 36% plan to switch to more affordable products. The more frequently a purchase decision is made, the stronger the focus on price and discounts.



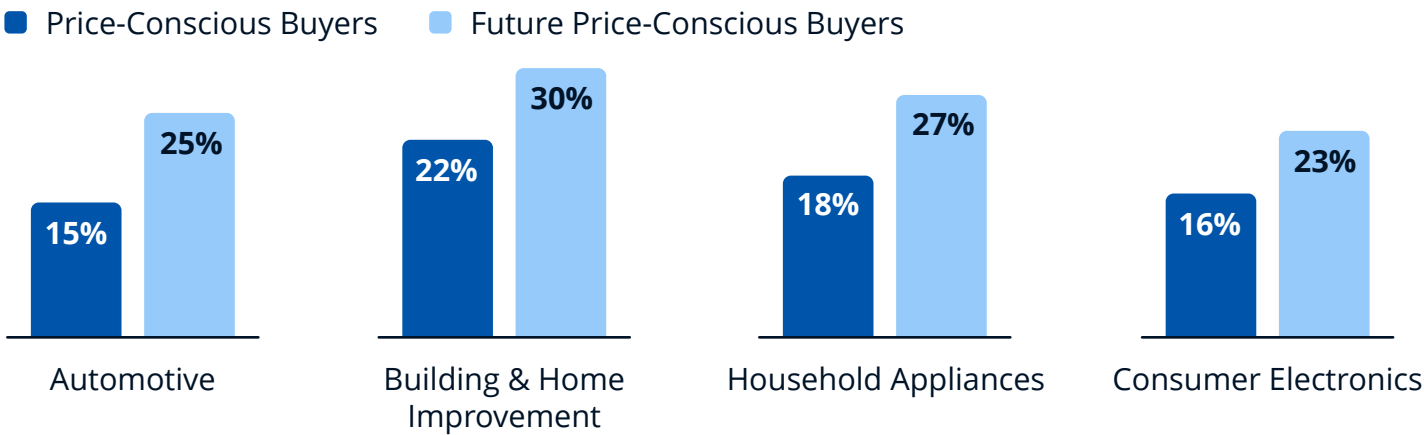


The Fine Line Between Quality and Price

At first glance, the focus on quality in durable product categories appears stable. In consumer electronics, household appliances, and the building & home improvement sector, buyers continue to opt for high-quality products.

However, consumer forecasts indicate a clear shift: the share of price-conscious buyers is expected to increase across all three categories. A similar pattern is emerging in the automotive sector, as illustrated in Figure 2.

Figure 2 Where Price Is Becoming Increasingly Important*



*Survey questions: How would you currently describe yourself as a customer when it comes to your purchasing decisions in the following categories?" and "How do you expect your purchasing behavior to develop in these categories in the future?"



A NEW BALANCE BETWEEN PRICE AND QUALITY

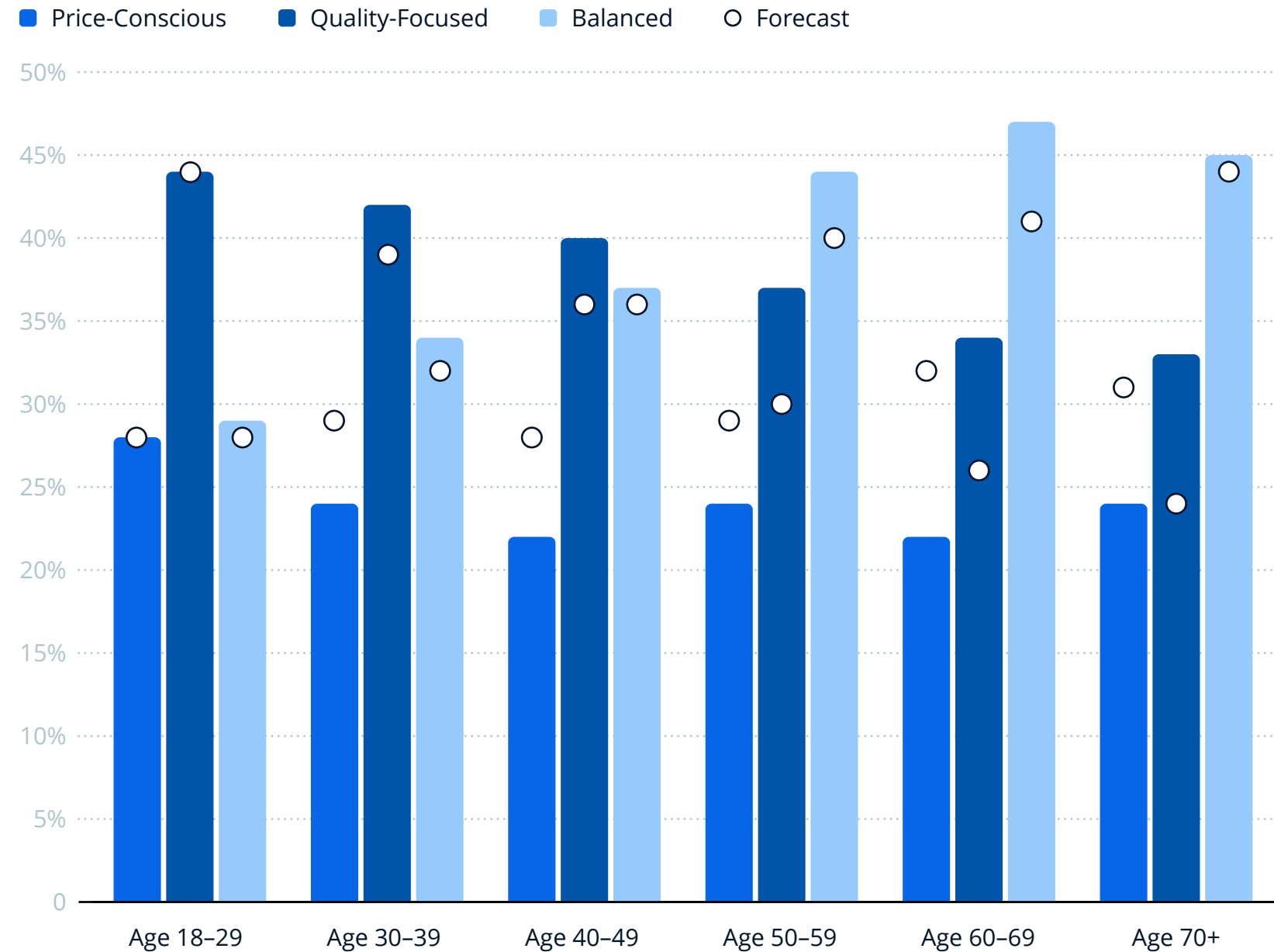
Price awareness is rising in many categories, but not every consumer group reacts in the same way. A closer look at individual segments shows how differently price sensitivity is shaped – and which factors ultimately influence the purchasing decision.



Young vs. Old: How Shopping Priorities Shift

Purchasing priorities evolve with age. While consumers under 40 tend to prioritize quality, older shoppers increasingly focus on a balanced price-to-value ratio. This trend is evident not only in current buying behavior but also in future expectations expressed by respondents.

Figure 3 Purchasing Behavior by Generation – What Matters Today and in the Future?*



*Survey questions: How would you currently describe yourself as a customer when it comes to your purchasing decisions in the following categories?
What do you expect your purchasing behavior to look like in these categories in the future?



From Quality-Driven to Value-Conscious

When it comes to saving on everyday essentials like food, all age groups are largely in agreement. However, in most other product categories, quality remains the dominant factor up to the age of 40. Nearly half of 30- to 39-year-olds continue to prefer high-quality products, particularly in household appliances and automobiles. From age 40 onward, purchasing behavior becomes more balanced – as seen in categories like home improvement (42%) and toys (43%).

From age 50, a balanced price-to-quality ratio clearly takes center stage. Furniture (50%), household appliances (47%), and automobiles (61% among those aged 60 and older) are purchased more deliberately. While quality remains important, it gradually loses its top priority

At the same time, financial commitments – such as mortgage payments or supporting family members – become increasingly relevant. As a result, high quality standards are reassessed more frequently in favor of a more balanced price-to-value approach.



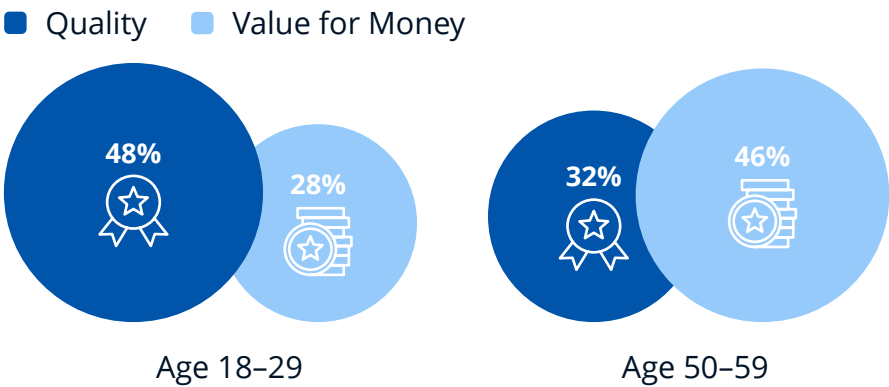
A KEY FACTOR

Older consumers evaluate their purchasing decisions more carefully and do not always opt for the highest quality or most well-known brand in every category.

Where Is the Trend Heading?

Forecasts indicate that consumers under age 40 will continue to prioritize quality. Among those 40 and older, price and quality considerations increasingly align, leading to more deliberate purchasing decisions. This trend intensifies after age 50, with value for money increasingly outweighing luxury. Furniture (46%) and household appliances (42%) are examples of categories where consumers plan to make more thoughtful, price-conscious choices in the future. A look at the automotive sector highlights how differently generations assess their future purchasing behavior.

Figure 4 Generational Differences in Future Car Buying Priorities*



*Survey question: How do you expect your purchasing behavior to change in these categories in the future?

While younger age groups continue to prioritize quality in many categories, food stands out: most age groups are expected to become even more price-conscious – with the notable exception of 18- to 29-year-olds, who still intend to prioritize quality even when it comes to groceries.

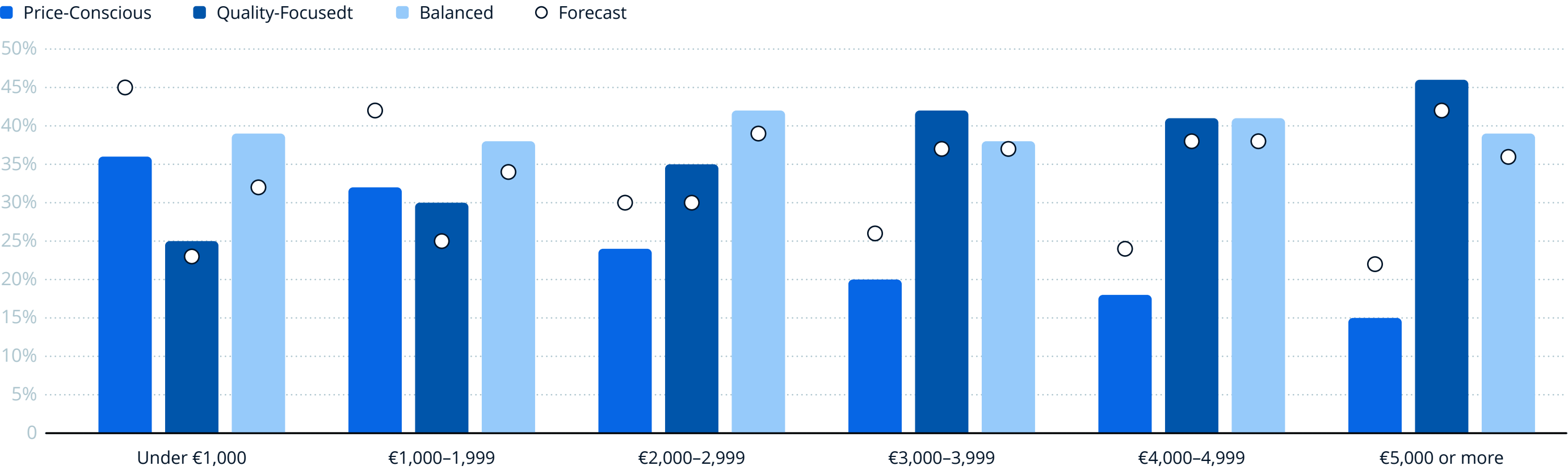
Budget or Luxury? How Income Shapes Purchasing Decisions

That income shapes purchasing decisions is hardly surprising. Households with lower net monthly incomes tend to be more price-conscious, while a higher budget increases the willingness to invest in quality. However, not all product categories follow this pattern.

Up to a household net income of €3,000, consumers generally follow a balanced price-to-value strategy. Savings are made primarily on fast-moving consumer goods such as cosmetics, food, and fashion. In contrast, spending on quality increases for consumer electronics (47%) and sporting goods (43%) starting at a monthly income of €2,000.

From a monthly household income of €3,000 onward, the preference for high quality becomes dominant in many categories – particularly in consumer electronics, household appliances, and automobiles.

Figure 5 What Matters Today and in the Future – Purchasing Behavior by Income Group (Monthly Household Net Income)*



*Survey questions: How would you currently describe yourself as a customer when it comes to your purchasing decisions in the following categories?
How do you expect your purchasing behavior in these categories to change in the future?

Where Is the Trend Heading?

Forecasts indicate a growing preference for quality as income rises, while price sensitivity continues to increase among lower-income households:



Households with a monthly income below €1,000 will become even more focused on affordable products.

In the €1,000–2,000 bracket, price awareness is also rising, whereas households earning €2,000–3,000 largely maintain a balanced approach. Between €3,000 and €5,000, the mix of quality and value-conscious decisions remains stable. However, purchases in automobiles, household appliances, and sports & outdoor goods will continue to be strongly quality-driven.

Top earners (from €5,000) will continue to prioritize quality, although with slight declines:



Household Appliances

Quality orientation drops from 64% to 58%
Price awareness rises from 12% to 17%



Consumer Electronics

Quality orientation declines from 63% to 55%
Price awareness increases from 10% to 14%



AN EXCEPTION AGAIN

The Savings Factor in Food

Here, the price often decides – regardless of income.



02



Brand Orientation

How the role of brands is evolving

In the past, brand names were seen as a guarantee of quality and trust. Manufacturers and retailers invested heavily in brand-building, with premium providers in particular reinforcing their brand promise through consistently high product quality – translating consumer trust into higher prices.

Today, brands are often just one choice among many across various product categories. But what truly drives brand loyalty? And where do these shifts create new challenges and opportunities for manufacturers and retailers?

Brand Loyalty Under Pressure – Where Labels Still Matter

Brand loyalty remains strong in technically advanced and durable categories such as automobiles, household appliances, and consumer electronics, where brands stand for safety, innovation, and quality. However, in everyday purchases, the landscape is shifting: When it comes to food, price is the key factor; for furniture, it's value for money that takes precedence. It's no longer about the label – it's about what consumers get for their money.

Between Prestige and Price – The Middle Segment Dilemma

While some established brands continue to thrive in durable goods, the mid-market segment is facing increasing pressure. Brands that fail to position themselves clearly as either affordable private labels or premium brands risk losing ground.

The Shrinking Middle Market

The numbers confirm this trend: consumers are increasingly moving away from the “balanced” choice, which traditionally favored mid-priced brands. This shift is especially pronounced in the automotive sector, where buyers expect their decisions to lean more toward either budget-friendly or high-end models:

- The share of mid-range buyers is projected to decline by 6 percentage points.
- The share of price-conscious consumers is expected to rise by 10 percentage points.

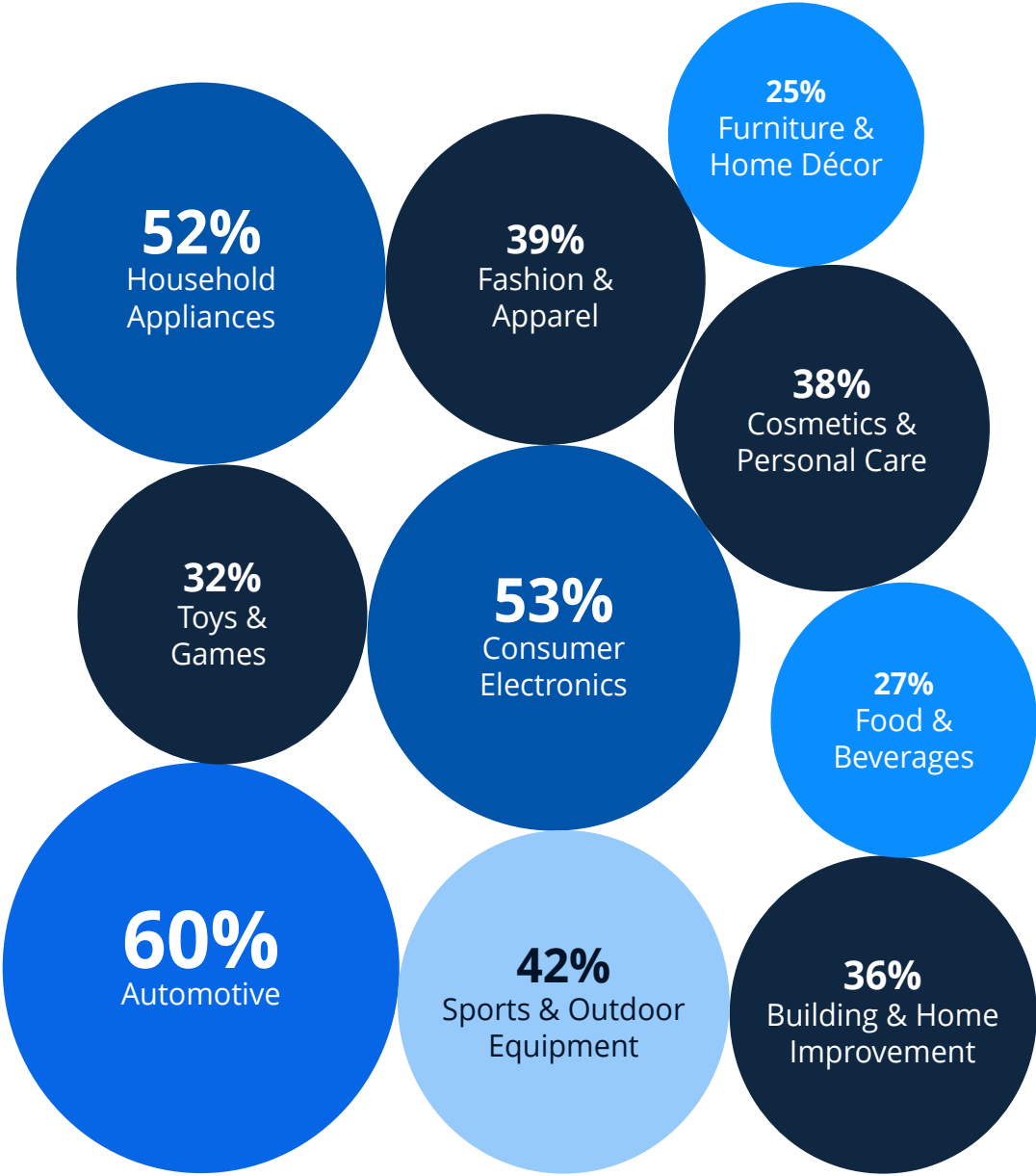
Similar shifts are emerging in household appliances and DIY/home improvement products, where the share of mid-range buyers is expected to decline by 3% and 4%, respectively. In many categories, the “golden middle” is shrinking, as consumers either aim to save or consciously invest in premium products. Brands that fail to clearly position themselves – whether on price or in the premium segment – risk being overlooked in purchasing decisions. Where brand matters most is shown in Figure 6.



THE MID-MARKET SEGMENT

This includes manufacturers and retailers targeting the broader consumer base, aiming to strike a **balance between price and quality** in their offerings. German brands like **VW, Esprit, and Galeria** are well-known examples, reflecting both the opportunities and the significant challenges of this segment.

Figure 6 How Important Are Brands? – Share of Consumers Still Choosing Familiar Names*



*Survey question: Which of the following categories best apply to you personally? Brands are important to me: I generally choose well-known brands.

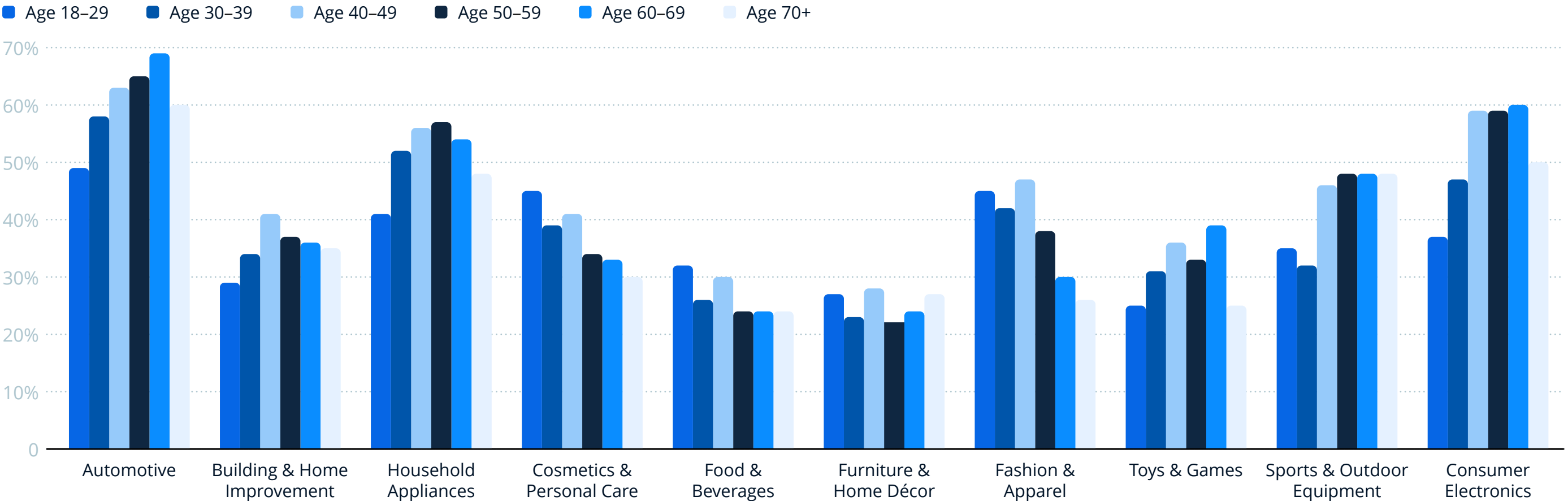
Trend vs. Trust:
The Generational Divide in Branding

The significance of brands shifts with age – and so does the motivation behind purchasing decisions. Younger consumers are more influenced by trends, identity, and social belonging. Especially in categories that shape their everyday lives, brands

play a central role: 45% of 18- to 29-year-olds attach high importance to brands in fashion and cosmetics, followed by 37% in consumer electronics. In trend-driven markets, popular brands hold a clear advantage – often secured through large marketing budgets. But brand loyalty among younger consumers is fragile: they switch flexibly between no-name and

premium products, as long as the look and overall experience meet their expectations. Figure 7 illustrates which product categories are most brand-driven – and where generational differences are most pronounced.

Figure 7 Brand Awareness by Generation – Who Prefers Well-Known Names?*



*Survey statement: Brands are important to me: I generally choose well-known brands.

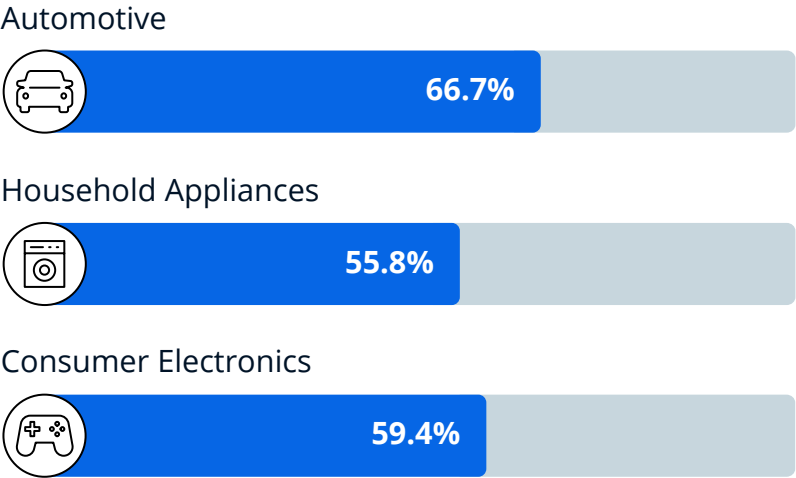


45% of 18- to 29-Year-Olds and 36% of 30- to 39-Year-Olds frequently switch between budget, mid-range, and premium options when shopping for fashion.

**Brand Loyalty with Age:
Reliability Over Trends**

Brand loyalty increases with age – after 50, consistency and reliability become more important, while trends fade into the background. Consumers aged 50 to 69 consciously choose well-known brands, especially when it comes to durable products.

Figure 8 Share of 50–69-Year-Olds Who Prefer Well-Known Brands*



*Survey statement: Brands are important to me:
I generally choose well-known brands.

For brands, securing a spot in the consideration set of middle-aged consumers is crucial. Those who succeed at this stage can build long-term customer relationships.

Is No-Name Becoming the New Normal?

A strong brand name alone is no longer enough – the product itself must deliver. More and more consumers are open to high-quality, lower-cost alternatives to established brands. This shift is particularly noticeable in food (55%), household appliances (44%), and fashion (51%), where willingness to switch brands is growing. This presents opportunities for new value brands and strategically positioned private labels.

**Smart Over Expensive:
The Rise of Pragmatic Shoppers**

Younger generations take a pragmatic approach to shopping: affordable alternatives are not seen as a compromise but as a smart choice. While older consumers still rely on established names in certain categories, a new wave of shoppers is emerging – one that asks: Why pay more when the difference is barely noticeable?

**More Than Just a Name:
Premium Must Deliver**

Manufacturers and retailers must increasingly highlight their unique value propositions – whether through product quality, added benefits, or service. At the same time, they need to consistently uphold their premium promise, for example, by offering extended warranties that ideally never need to be used.

03



The Path to Purchase

New dynamics in consumer behavior

Purchasing decisions don't follow a fixed logic. Whether a purchase is planned or impulsive depends not on the person, but on the product. While consumers may meticulously compare prices in one category, they might spontaneously opt for a premium brand in another.

Digital offers and algorithms amplify this effect – blurring purchasing patterns and reducing brand loyalty. At the same time, inflation and rising living costs create new incentives: compare, save, or make a spontaneous purchase? Understanding when consumers think strategically and when they act on impulse allows businesses to influence purchasing decisions more effectively.

Spontaneous or Strategic? Context Shapes Purchasing Behavior

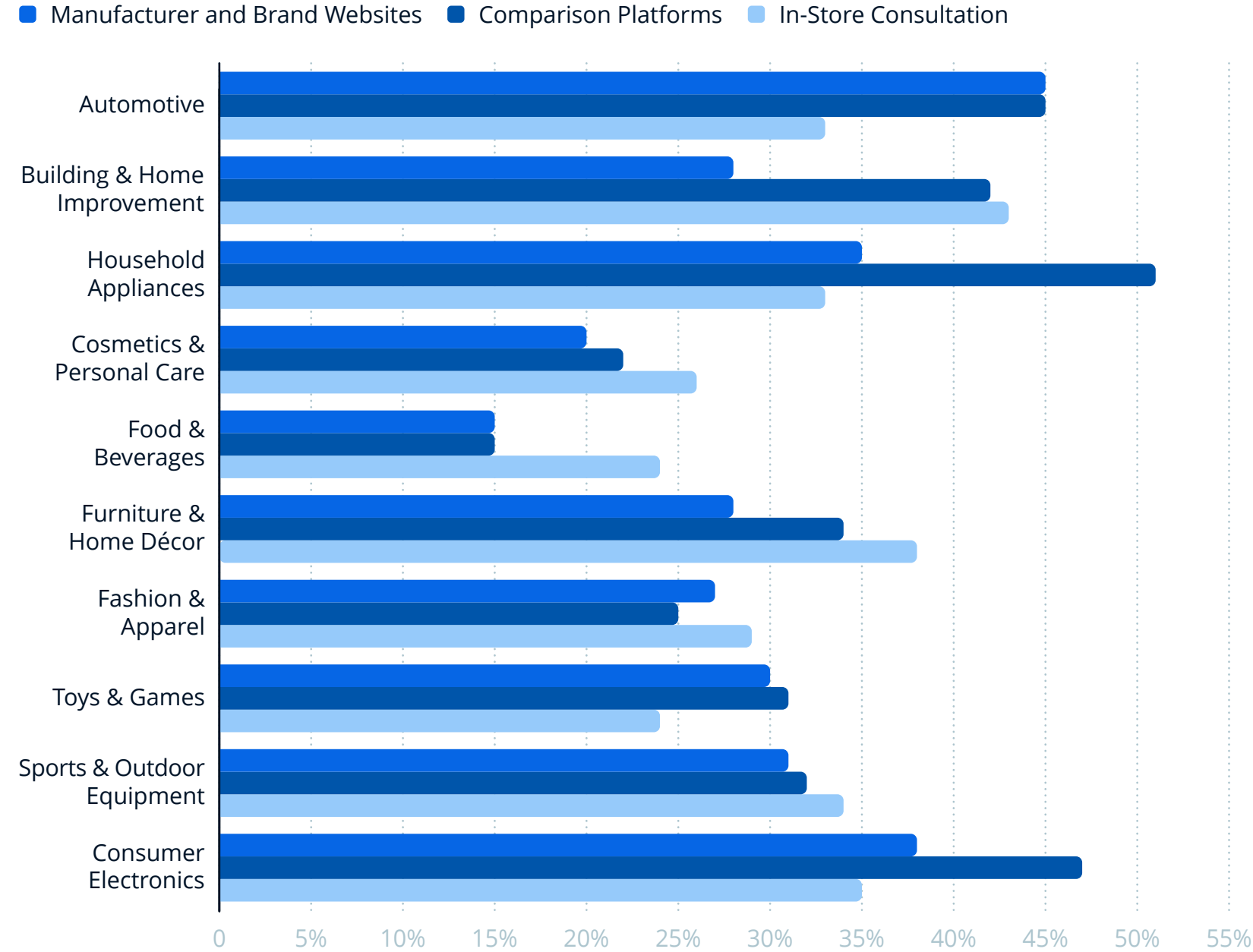
The same person who spends weeks comparing smartphone models may buy cosmetics on impulse. Spontaneous purchases are most common in categories like food, fashion, and cosmetics, whereas high-ticket items such as household appliances or consumer electronics are planned in nine out of ten cases.

Rising living costs are reinforcing this trend: 59% of consumers are adjusting their purchasing behavior in response to inflation, and 47% are paying closer attention to discounts. Older consumers aged 50 and above (67%) and middle-income households earning up to €4,000 (62%) are particularly price-sensitive. But even younger generations are becoming more budget-conscious, with over half of those under 30 actively seeking out special offers and discounts. This varying degree of spontaneity also affects how and where consumers seek information before making a purchase. While some product categories are heavily influenced by online research, others rely more on in-store advice and personal consultation (see Figure 9).



Specialty stores are particularly relevant for purchasing decisions in home improvement and furniture. In the automotive and consumer electronics categories, brand websites dominate.

Figure 9 The Modern Purchase Decision – Where Consumers Seek Information*



*Survey question: How do you typically research products and offers in these categories?

Planned and Impulse Purchases Are Merging

Digital offers are dismantling rigid purchasing patterns. Algorithms strategically push products, turning planned purchases into spontaneous decisions. At the same time, price comparisons are replacing brand loyalty – every second buyer of household appliances and consumer electronics already uses comparison platforms. Many retailers now integrate new and second-hand goods within a single platform, as seen with About You.

The Changing Playbook for Brands

Strategic planning and impulse purchases coexist, requiring brands to respond with flexibility. While price comparisons attract intent-driven shoppers, targeted promotions trigger spontaneous buying decisions. A data-driven approach is becoming essential to effectively manage customer segments and optimize marketing efforts. Digital-first competitors and start-ups are already leveraging tightly focused test scenarios to learn quickly and continuously refine their strategies – an approach that established companies can systematically integrate and scale.

Overtaken by Trends?

Purchasing decisions are more dynamic than ever, with social media capable of triggering a boom in just hours. A prime example: Dubai chocolate became a global scarce commodity after a viral TikTok video. Retailers struggled to meet demand, and prices soared due to limited availability. The chocolate didn't just become a hype product – its rapid scarcity transformed it into a coveted luxury item with a price premium. Early buyers paid just a few euros, while latecomers had to spend ten times as much or more. Brands that failed to react swiftly lost market share overnight.



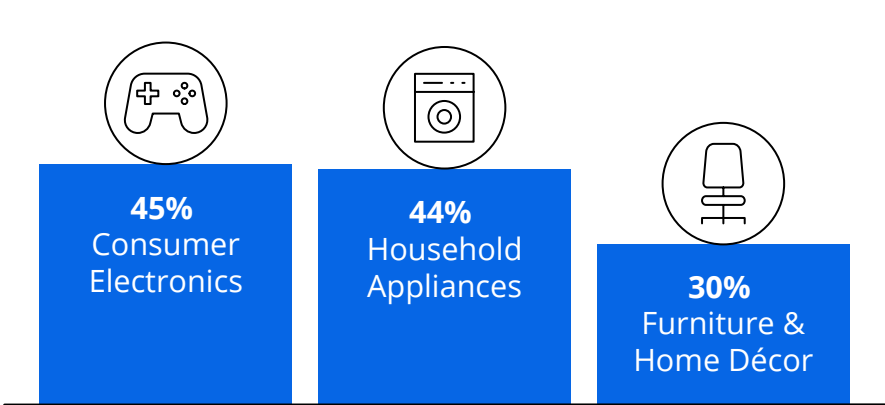
Special offers remain a key purchase driver: 47% of consumers are spontaneously influenced to make a purchase when discounts are offered.



Trust Drives Decisions – Both Online and In-Store

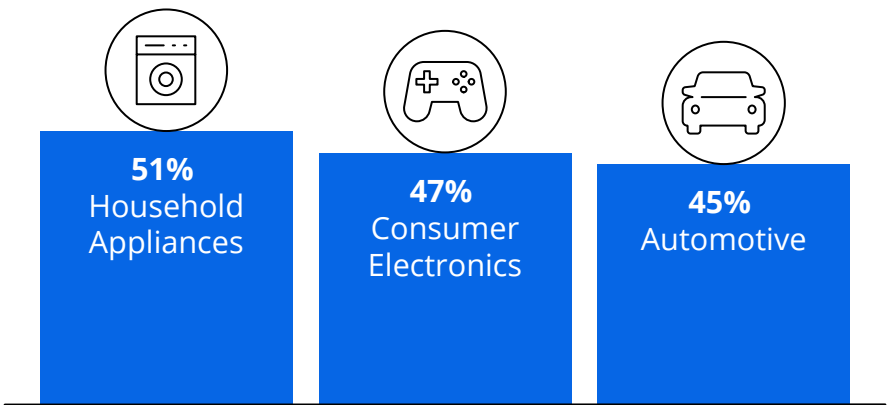
When it comes to high-ticket or complex products, consumers value more than just the brand and image. Many actively use additional information sources.

Figure 10 Top 3 Categories Where Consumers Pay Close Attention to Reviews and Comments*



*Survey statement: For me, product reviews and ratings online play a crucial role in my purchasing decisions.

Figure 11 Top 3 Categories Where Consumers Actively Use Comparison Platforms**



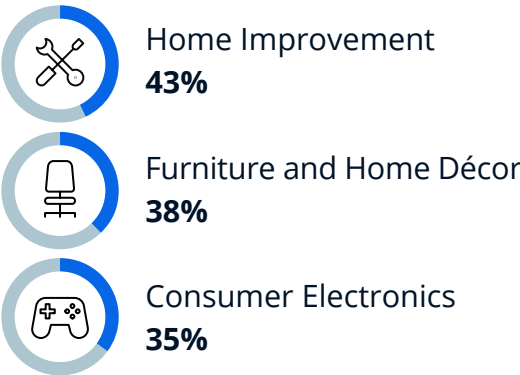
**Survey question: How do you typically inform yourself about products and offers in these categories Answer: Online portals and comparison sites (e.g., price comparison or review sites)

Benefit from Trends, Instead of Chasing Them

Social media can accelerate buying trends, but in the long run, trust, comparability, and availability are what really matter. Brands need to do more than just recognize trends – they must also be present on review and comparison platforms to influence sustainable purchasing decisions. They must also deliver on their promises, as negative reviews spread online with great speed and impact

Digital Advice isn't Always Enough

However, many consumers still rely on in-person consultation. In the following categories, expertise in-store continues to play a crucial role:***



***Survey question: How do you typically inform yourself about products and offers in these categories? Answer: Specialized Retailers and In-Person Advice

04

Five Strategies for Tomorrow's Retail

Consumer behavior is evolving – and the shift is here to stay. More and more shoppers prioritize price, brand loyalty is fading, and digital platforms wield growing influence over purchasing decisions. Brands in the mid-price segment face increasing pressure: those that fail to stand out risk losing visibility. However, companies can take action – through clear positioning, smarter use of data, and flexible sales models.



1. CLEAR POSITIONING BEATS THE INDISTINCT MIDDLE

- Consumers are increasingly choosing between discount and premium, making the mid-price segment less relevant.
- Brands that fail to stand out – either through competitive pricing or exclusive quality – risk being overlooked.



Sharpen Your Profile

Define what your brand stands for. Differentiate through quality, price, or a strong unique selling point.



Ensure Relevance

Align your product range with customers' willingness to pay. Introduce anchor products, such as wardrobe basics, under private labels.



Stay Flexible

Monitor market trends and dynamically adjust offerings to stay competitive.

2. STRATEGIC PRICING INSTEAD OF RANDOM DISCOUNTS

- Price is the key factor for everyday products, but quality remains essential in durable categories – though price sensitivity is rising.
- Instead of relying on blanket discounts, a targeted pricing strategy is more effective.



Highlight Added Value

Why is a higher investment worth it? Provide compelling reasons to buy.



Optimize Pricing

Use flexible models like bundles or subscriptions instead of short-term discount battles.



Create Smart Purchase Incentives

Leverage omnichannel strategies to guide customers toward the right decision.

3. TRUST AS THE KEY TO SUCCESS

- While brand loyalty is fading, trust continues to play a central role in fostering long-term customer loyalty.
- Younger consumers make pragmatic choices, while older customers expect consistency – in both cases, brands must deliver on their promises.



Build Transparency

Leverage independent reviews, product tests, and services to strengthen trust.



Offer Added Value

Provide personalized support, extended warranties, or exclusive services.



Foster Long-Term Loyalty

Create loyalty programs or community initiatives that offer genuine benefits.



4. UNDERSTAND TARGET GROUPS PRECISELY AND ADDRESS THEM EFFECTIVELY

- Anyone seeking to understand consumers needs valid insights and smart analytical tools.
- Through systematic analysis of anonymized customer data and targeted surveys, behavioral patterns can be identified early – and leveraged strategically.



Expand Digital Visibility

Ensure relevance on price comparison sites, review platforms, and social commerce – and leverage relevant data.



Use Data Strategically

Utilize smart tools and analytics to detect trends early and respond proactively.



Collaborate with Strong Partners

Integrate external data solutions to enhance decision-making and optimize strategies.

5. CONNECTING STRATEGIC PURCHASES WITH SPONTANEOUS IMPULSES

- Social media, promotional offers, and recommendations trigger spontaneous purchases, while high-value products are typically planned well in advance.
- Successful companies manage both dynamics – and reach customers at the right moment.



Create Targeted Purchase Incentives

Leverage personalized offers based on real customer interests.



Implement Flexible Pricing

Use smart pricing strategies to engage customers individually.



Strengthen Omnichannel Models

Seamlessly integrate online and offline channels for maximum impact.



Data-Driven Market Positioning with Statista+

Precise market analyses, future-ready strategies, and well-informed decisions

Our study provides a comprehensive overview of the German consumer landscape. However, in a dynamic competitive environment, focusing on overall trends alone is not enough.

Sustainable success requires a deep understanding of brand perception, target customer needs, and competitive dynamics. This foundation enables the development of an optimal go-to-market strategy.

Statista+ offers comprehensive solutions to support data-driven decision-making.



TARGET GROUP ANALYSIS & SEGMENTATION

- Development of detailed, differentiated buyer groups
- Identification of the most relevant customer segments
- Analysis of buying motives and decision-making processes



MARKET & TREND ANALYSIS

- Assessment of global market segments and industry dynamics
- Identification of growth opportunities and demand potential
- Forecasting consumer trends and price developments



BRAND TRACKING & COMPETITIVE ANALYSIS

- Tracking of brand perception and positioning
- Benchmarking within the competitive landscape and identifying differentiation opportunities
- Evaluating the effectiveness of existing marketing initiatives



STRATEGIC MARKET ALIGNMENT

- Development of precise growth strategies based on market and competitor insights
- Optimization of go-to-market and pricing strategies
- Derivation of strategic actions for long-term market success

Building Sustainable Success Together

Statista+ enhances Statista's global data platform with customized market research, strategy consulting, and marketing communication services for clients across industries worldwide.

With a team of 200+ experts from diverse disciplines, Statista+ empowers organizations to unlock their full potential through tailored, data-driven solutions.

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