



Face value: Unmasking skincare shoppers in France in 2025

Exploring what skincare consumers are prioritizing in 2025, with a spotlight on Gen Z.



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Foreword



“As skincare trends continually shift, knowing what consumers care about can provide valuable intelligence for brand strategists and marketers.

In this report, we share the key benefits skincare consumers are looking for as they head into 2025, the sustainability initiatives they deem the most important, and the trends they’re considering trying in the next 12 months. Throughout, we take a spotlight look at how trends shift among the younger demographic – with a profile deep dive on Gen Z skincare enthusiasts.”

Alexandre Devineau

General Manager, YouGov France

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Report takeaways



Treat yourself:

38% of Gen Z skincare consumers state they purchase skincare products to treat themselves, compared to 20% of all skincare consumers.



Retail sway: 30% of Gen Z skincare consumers state that having a store conveniently located is an important factor when deciding which retailer to shop with, compared to 22% for all age groups.



Tuning into discovery channels:

Facebook is the leading digital platform for discovering new skincare products for all skincare consumers (44%), followed by Instagram (41%) and YouTube (31%).



Driving influence among Gen Z:

Stalls in stores, influencers on social media and online advertising are significant discovery drivers for Gen Z skincare consumers compared to other age groups.



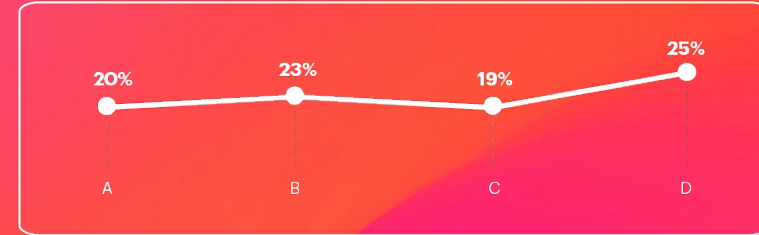
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Data results

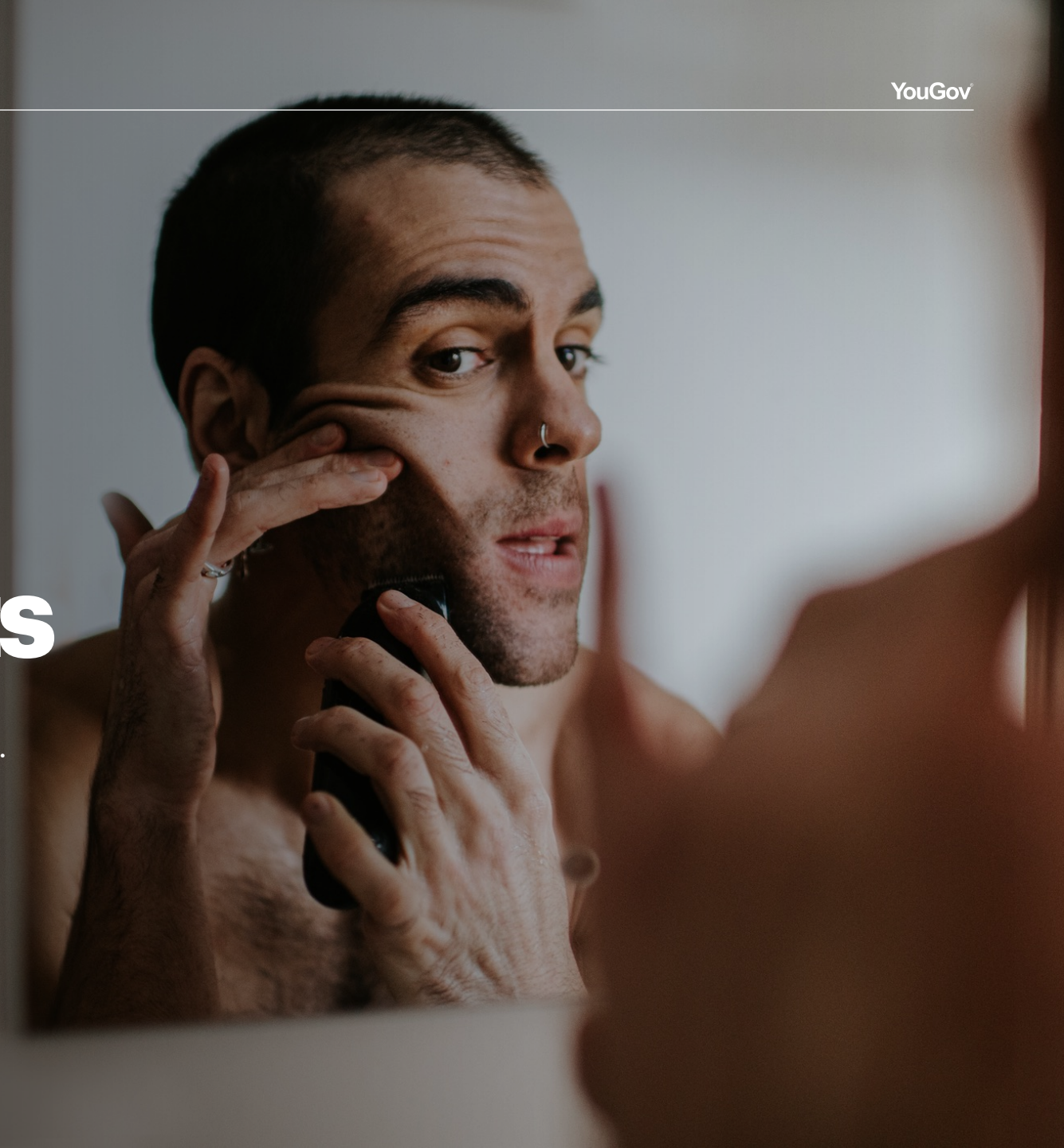


37%
(vs. Nat Rep)



The glow down: Consumer insights

Exploring what matters to skincare consumers in France in 2025.

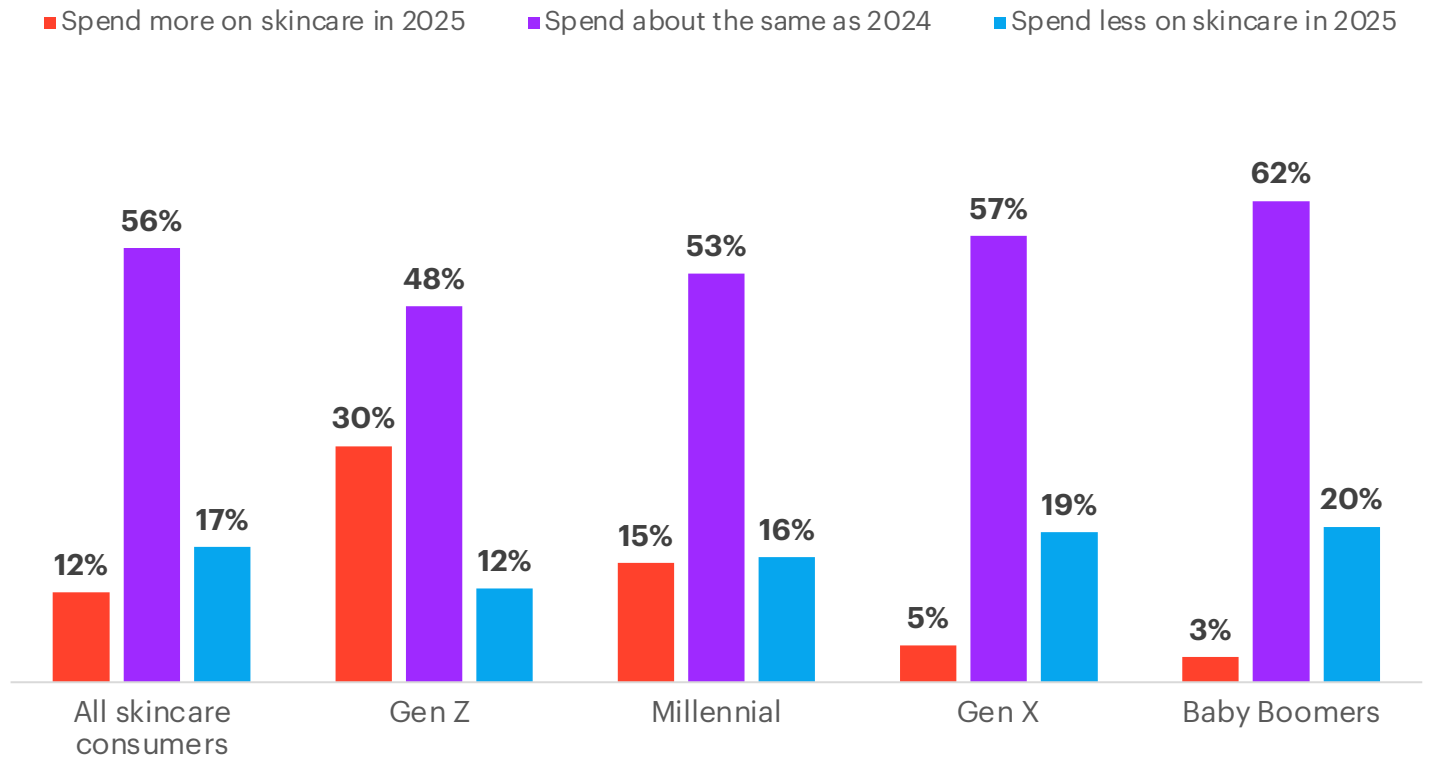


68% of French skincare consumers expect to spend the same or more on skincare in 2025

Gen Z are most likely to increase their spending on skincare in 2025, with **30%** stating they will spend more, and **48%** stating they will spend the same amount.

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Compared to 2024, how much do you expect to spend on skincare in 2025?



YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n>100).

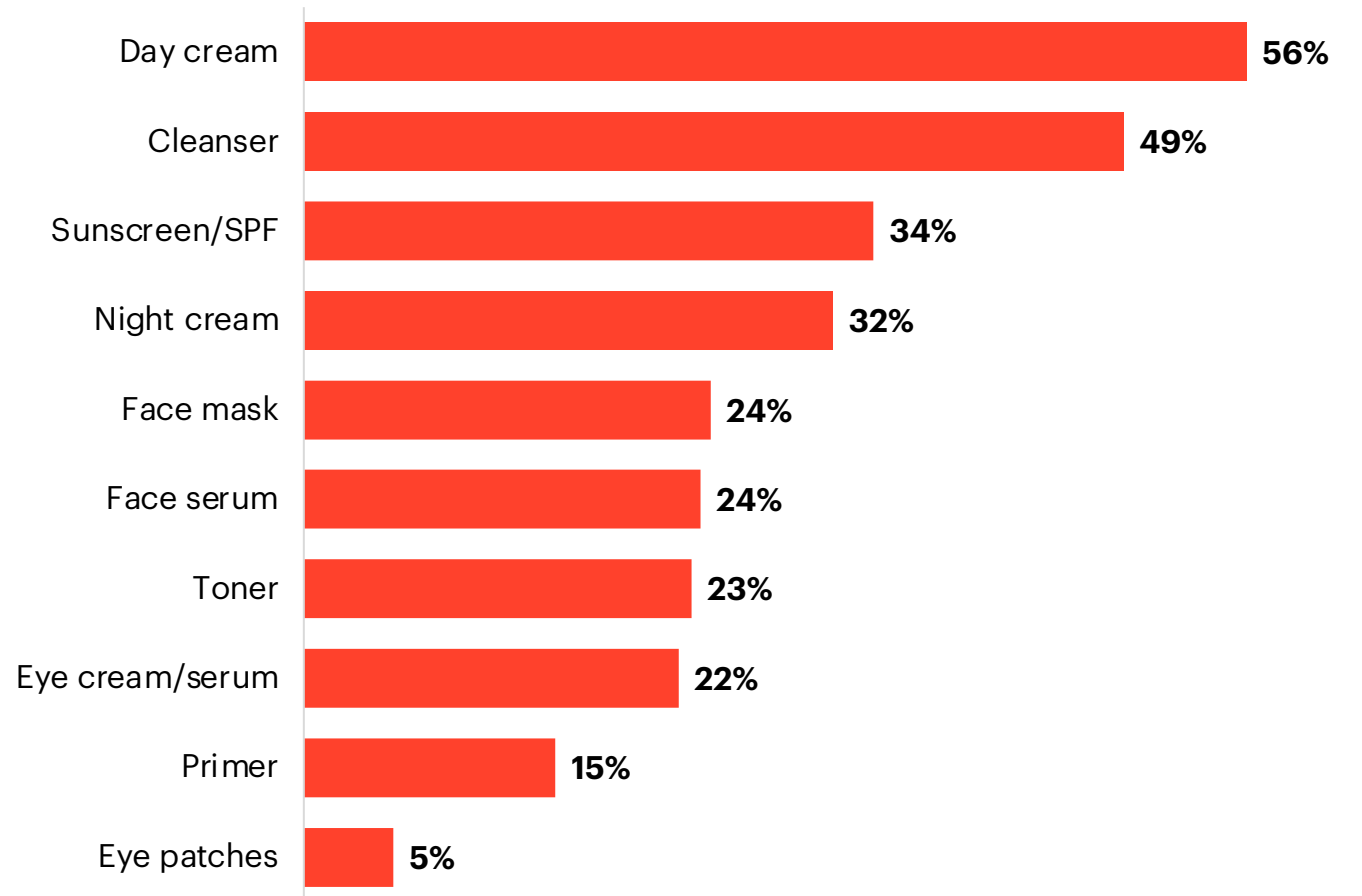
*Don't know and not applicable not shown.

1 in 2 French skincare consumers regularly use moisturizers and cleansers

Day cream was the most used skincare product in the last month, followed by cleanser, SPF, night cream, and face masks.

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Which, if any, of the following types of skincare products have you used in the last month? Please select all that apply.*



YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n>750).

*Don't know and None of these options not shown.

Day cream and cleanser are key products used by all generations

Gen Z prioritize day cream and cleanser equally (46%), a trend not observed for other generations.

Which, if any, of the following types of skincare products have you used in the last month? Please select all that apply.*

Gen Z

	Products used	% of respondents
1	Day cream	46%
2	Cleanser	46%
3	Sunscreen / SPF	40%
4	Night cream	35%
5	Face mask	33%

Millennial

	Products used	% of respondents
1	Cleanser	53%
2	Day cream	47%
3	Night cream	32%
4	Face mask	30%
5	Sunscreen / SPF ▼	27%

Gen X

	Products used	% of respondents
1	Day cream ▲	59%
2	Cleanser	49%
3	Sunscreen / SPF	32%
4	Night cream	31%
5	Eye cream / serum	24%

Baby Boomer

	Products used	% of respondents
1	Day cream ▲	66%
2	Cleanser	47%
3	Sunscreen / SPF	36%
4	Night cream	29%
5	Toner	26%

YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n> 100). Don't know and None of these options not shown.

▲/▼: Indicates statistically significant differences among Gen Z and other generations.

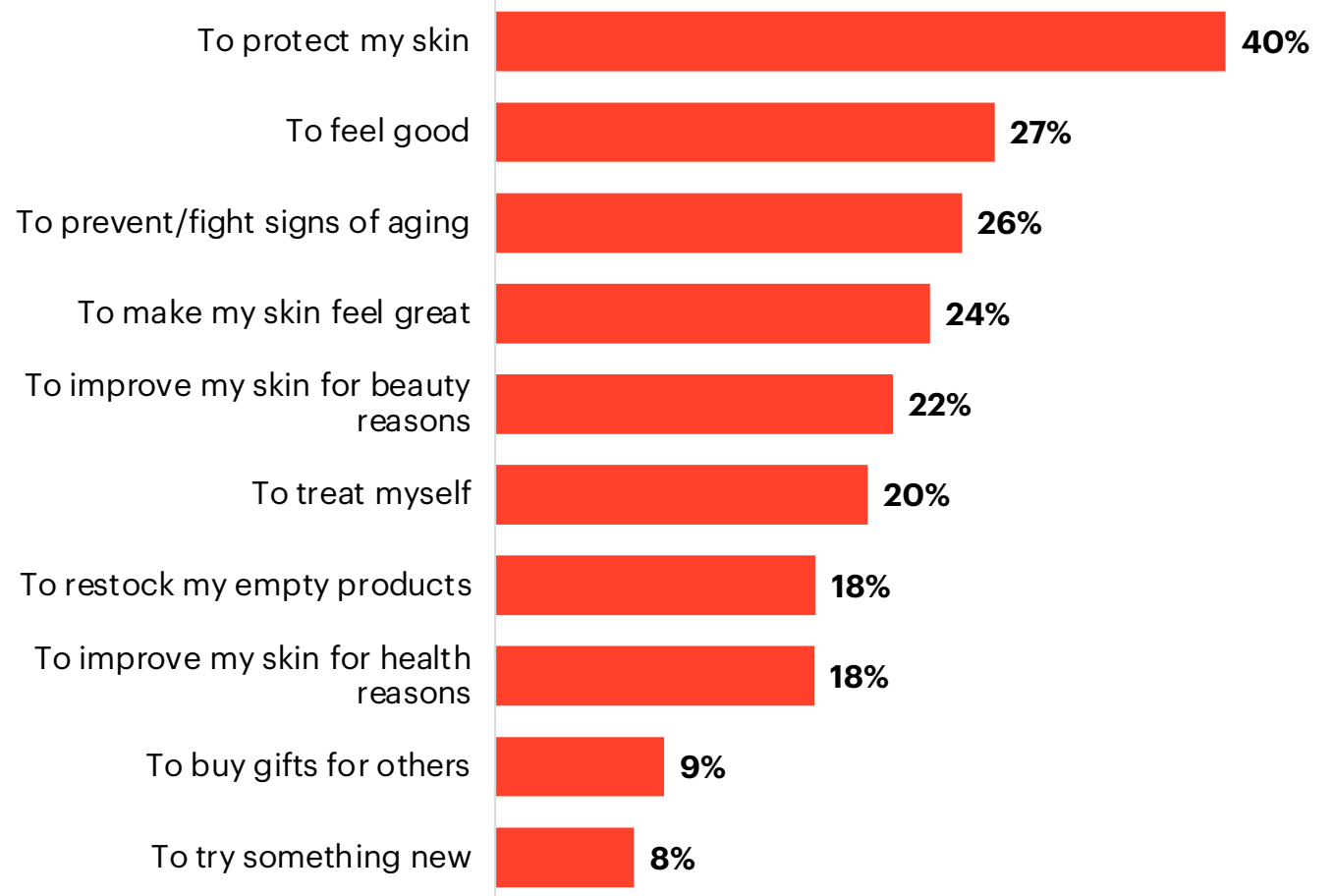
What matters to people in France in 2025?

People in France prioritize skincare for protection, well-being, and anti-aging.

Notably, **22%** of people in France said they do not purchase skincare products.

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**In general, what are the main reasons you purchase skincare products?
Please select all that apply.**



YouGov Surveys: September 13 - October 1, 2024, FR. (n> 1,000).

Gen Z skincare consumers are more likely to purchase skincare products to treat themselves

38% of Gen Z skincare consumers state they purchase skincare products to treat themselves, compared to 20% of all skincare consumers. Older consumers are significantly more likely to buy skincare to fight signs of aging.

In general, what are the main reasons you purchase skincare products? Please select all that apply.*

Gen Z

	Reasons to purchase	% of respondents
1	To protect my skin	41%
2	To treat myself ▲	38%
3	To improve my skin for beauty reasons	36%
4	To feel good	35%
5	To make my skin feel great	34%

Millennial

	Reasons to purchase	% of respondents
1	To protect my skin	43%
2	To feel good	36%
3	To improve my skin for beauty reasons	30%
4	To make my skin feel great	28%
5	To treat myself ▼	26%

Gen X

	Reasons to purchase	% of respondents
1	To protect my skin	52%
2	To prevent/fight signs of aging ▲	40%
3	To feel good	35%
4	To make my skin feel great	31%
5	To improve my skin for beauty reasons	26%

Baby Boomer

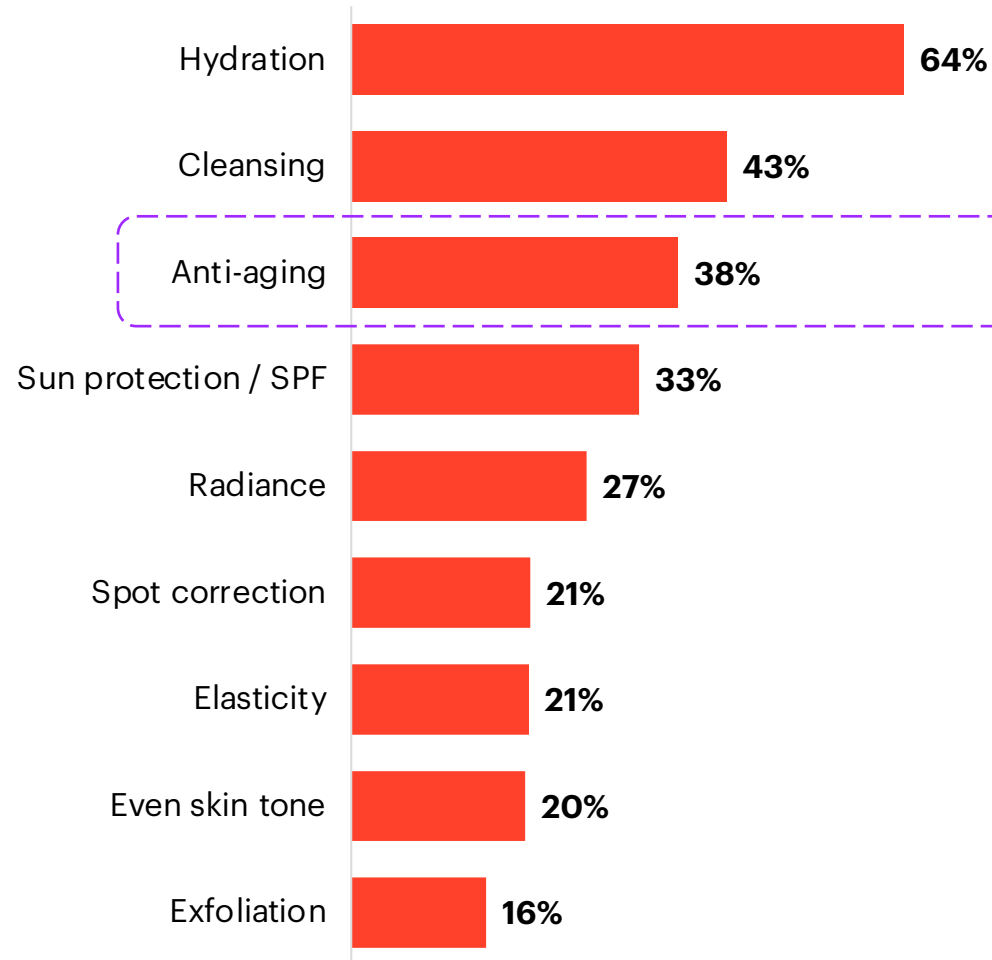
	Reasons to purchase	% of respondents
1	To protect my skin ▲	63%
2	To prevent/fight signs of aging ▲	40%
3	To feel good	33%
4	To make my skin feel great	30%
5	To restock my empty products	26%

Hydration is the main benefit that skincare consumers are looking for

Female skincare consumers are significantly more likely to prioritize anti-aging properties.

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Which benefits, if any, do you look for in your skincare products? Please select all that apply.*



48% of females seeking this benefit in comparison to **20% of males.**

YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n>750).

*Other, Don't know, and Not applicable options not shown.

Hydration is the most desired benefit across all generations

Gen Z prioritize SPF higher than all other generations, with a +16 percentage-point increase in comparison to Millennials.

Which benefits, if any, do you look for in your skincare products? Please select all that apply.*

Gen Z

	Benefits	% of respondents
1	Hydration	54%
2	Cleansing	50%
3	Sun protection / SPF	42%
4	Exfoliation	28%
5	Even skin tone	26%

Millennial

	Benefits	% of respondents
1	Hydration	59%
2	Cleansing	44%
3	Radiance	30%
4	Sun protection / SPF ▼	26%
5	Anti-aging	25%

Gen X

	Benefits	% of respondents
1	Hydration ▲	71%
2	Anti-aging ▲	46%
3	Cleansing	40%
4	Sun protection / SPF	32%
5	Radiance	23%

Baby Boomer

	Benefits	% of respondents
1	Hydration ▲	68%
2	Anti-aging ▲	49%
3	Cleansing	41%
4	Sun protection / SPF	34%
5	Radiance	27%

YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n> 100). Don't know and None of these options not shown.

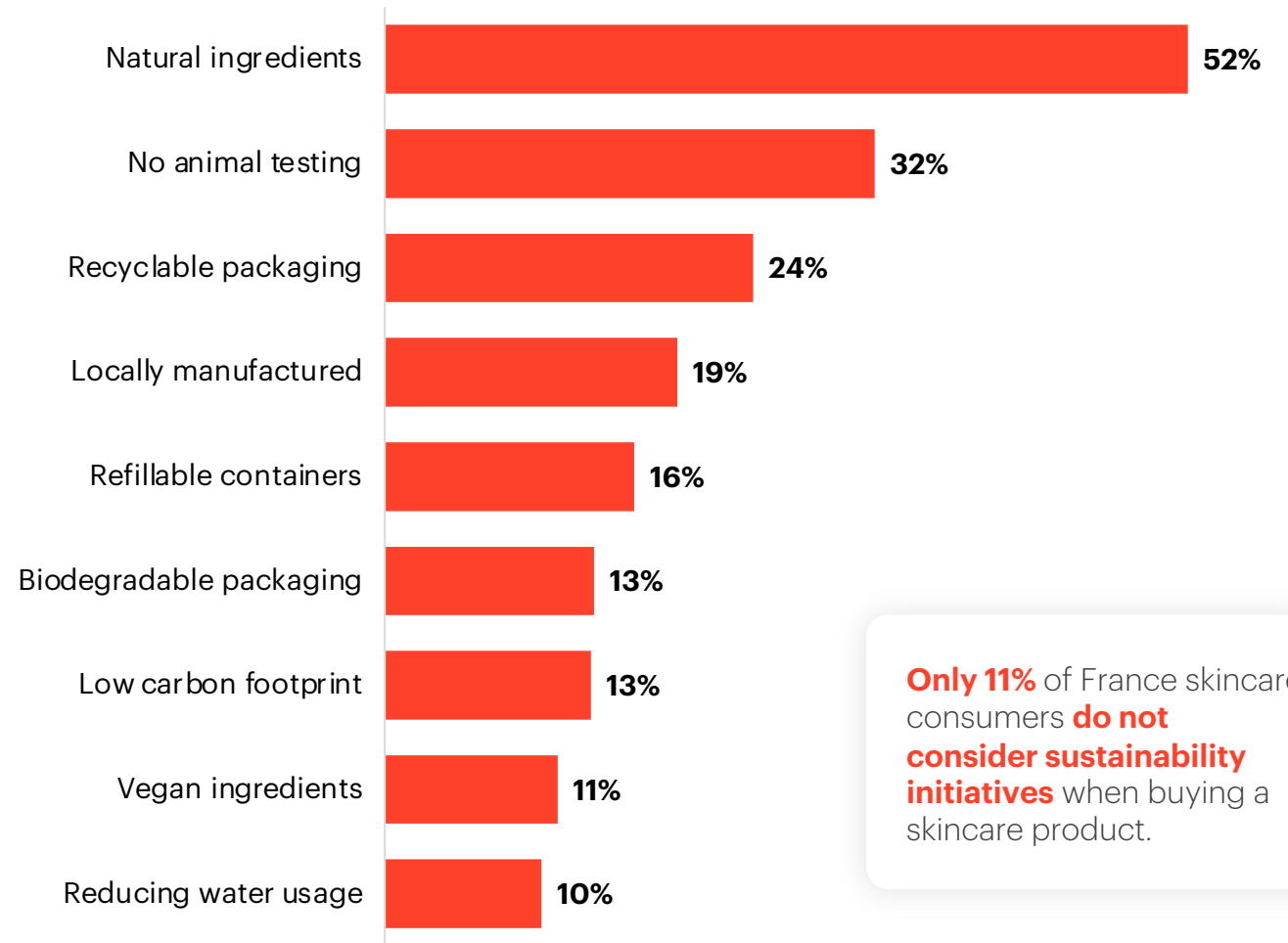
▲/▼: Indicates statistically significant differences among Gen Z and other generations.

Natural ingredients is a top sustainability initiative for 1 in 2 skincare consumers in France

Followed by no animal testing (32%), recyclable packaging (24%), local manufacturing (19%), and refillable containers (16%).

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Which sustainability initiatives, if any, are most important to you when purchasing a skincare product? Please select up to 3 options.



Only 11% of France skincare consumers **do not consider sustainability initiatives** when buying a skincare product.

YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n>750).

*Other, don't know options not shown.

Natural ingredients is the top sustainability initiative across all generations

23% of Gen Z skincare consumers selected vegan ingredients as one of their top 3 most important sustainability initiatives – a significantly higher percentage compared to all other generations.

What are the top 3 most important sustainability initiatives that you take into consideration when purchasing a skincare product.

Gen Z

	Sustainability Initiatives	% of respondents
1	Natural ingredients	41%
2	No animal testing	28%
3	Vegan ingredients ▲	23%
4	Refillable containers	22%
5	Locally manufactured	20%

I do not consider any sustainability initiatives

6%

Millennial

	Sustainability Initiatives	% of respondents
1	Natural ingredients	42%
2	No animal testing	34%
3	Recyclable packaging	26%
4	Locally manufactured	19%
5	Low carbon footprint	17%

I do not consider any sustainability initiatives

11%

Gen X

	Sustainability Initiatives	% of respondents
1	Natural ingredients ▲	58%
2	No animal testing	32%
3	Recyclable packaging	23%
4	Locally manufactured	18%
5	Refillable containers	16%

I do not consider any sustainability initiatives ▲

14%

Baby Boomer

	Sustainability Initiatives	% of respondents
1	Natural ingredients ▲	61%
2	No animal testing	34%
3	Recyclable packaging	22%
4	Locally manufactured	21%
5	Refillable containers	16%

I do not consider any sustainability initiatives

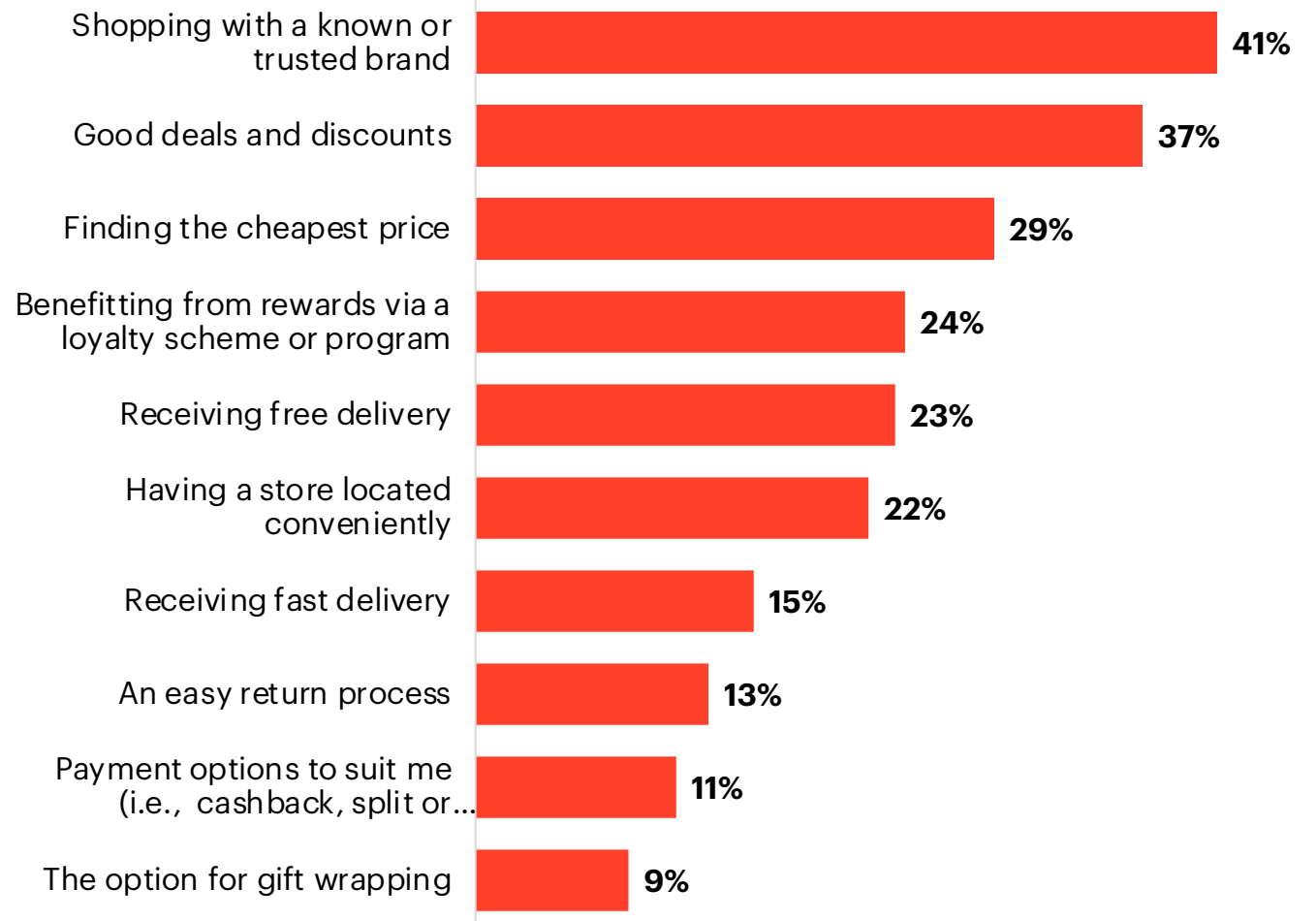
12%

What drives consideration of retailers among skincare consumers in France?

Shopping with known or trusted brand is the leading factor when deciding which skincare retailers to shop with (41%).

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Which, if any, are the most important factors to you when deciding which skincare retailer to shop with? Please select all that apply.



YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n>750).

*Other, Don't know, and Not applicable options not shown.

Gen Z consumers are looking for trusted brands, convenience and good deals

30% of Gen Z skincare consumers state that having a store conveniently located is an important factor when deciding which retailer to shop with, compared to 22% for all age groups.

Which, if any, are the most important factors to you when deciding which skincare retailer to shop with? Please select all that apply.

Gen Z

	Retailer factors	% of respondents
1	Shopping with a known or trusted brand	34%
2	Having a store located conveniently	30%
3	Good deals and discounts	28%
4	Finding the cheapest price	27%
5	Benefitting from rewards via a loyalty scheme or program	23%

Millennial

	Retailer factors	% of respondents
1	Good deals and discounts	37%
2	Shopping with a known or trusted brand	32%
3	Finding the cheapest price	30%
4	Receiving free delivery	23%
5	Benefitting from rewards via a loyalty scheme or program	22%

Gen X

	Retailer factors	% of respondents
1	Good deals and discounts ▲	42%
2	Shopping with a known or trusted brand	39%
3	Finding the cheapest price	32%
4	Receiving free delivery	28%
5	Benefitting from rewards via a loyalty scheme or program	26%

Baby Boomer

	Retailer factors	% of respondents
1	Shopping with a known or trusted brand ▲	51%
2	Good deals and discounts	38%
3	Finding the cheapest price	27%
4	Having a store located conveniently	24%
5	Benefitting from rewards via a loyalty scheme or program	24%

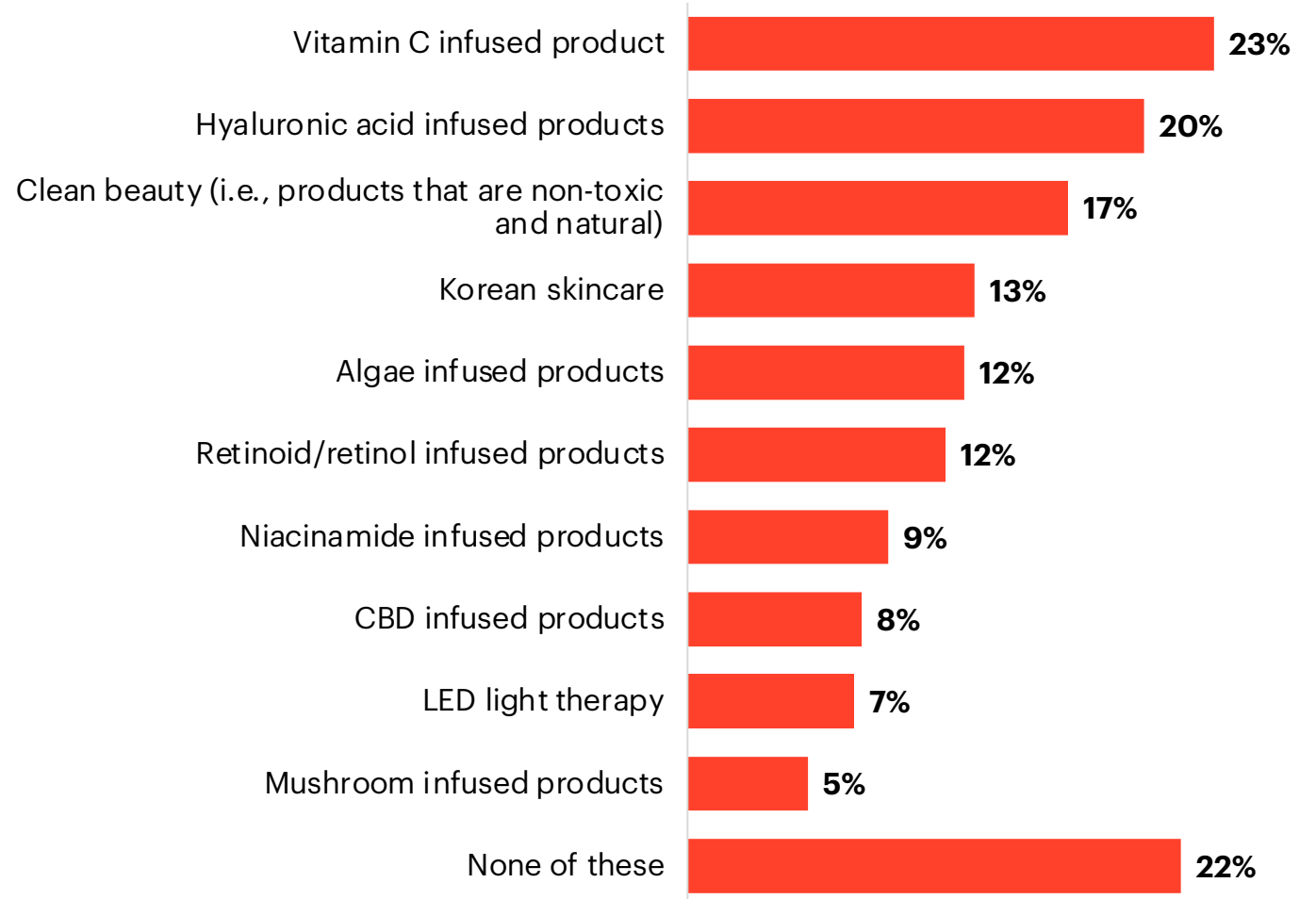
Future-facing skincare trends

Female skincare consumers are significantly more likely to try hyaluronic acid infused products (**27%**) in the next 12 months compared males (**10%**).

Males are slightly more inclined to try CBD and mushroom infused products than their female counterparts.

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Which of the following skincare trends are would you consider trying in the next 12 months?*



YouGov Surveys: September 13 - October 1, 2024, FR. Frances who purchase skincare products (n>750).

*Don't know not shown.

Gen Z consumers are significantly more likely to consider trying Korean skincare

26% of Gen Z skincare consumers stated that they would consider trying Korean skincare (multi-step routines focused on hydration) in the next 12 months, compared to 13% of all the other generations.

Which of the following skincare trends are would you consider trying in the next 12 months?*

Gen Z

	Skincare trends	% of respondents
1	Clean beauty	30%
2	Vitamin C infused product	28%
3	Korean skincare ▲	26%
4	Hyaluronic acid infused products	21%
5	Niacinamide infused products	19%

None of these

13%

Millennial

	Skincare trends	% of respondents
1	Vitamin C infused product	31%
2	Hyaluronic acid infused products	22%
3	Clean beauty	20%
4	Korean skincare ▼	15%
5	Niacinamide infused products	14%

None of these

15%

Gen X

	Skincare trends	% of respondents
1	Hyaluronic acid infused products	21%
2	Vitamin C infused product	20%
3	Algae infused products	15%
4	Clean beauty ▼	13%
5	Korean skincare ▼	12%

None of these ▲

26%

Baby Boomer

	Skincare trends	% of respondents
1	Vitamin C infused product	18%
2	Hyaluronic acid infused products	18%
3	Algae infused products	14%
4	Clean beauty ▼	10%
5	Retinoid/retinol infused products	9%

None of these ▲

32%

The glow down: Discovery drivers

Uncovering how skincare consumers in France discover new skincare products – and which digital channels have the biggest influence among each generation.

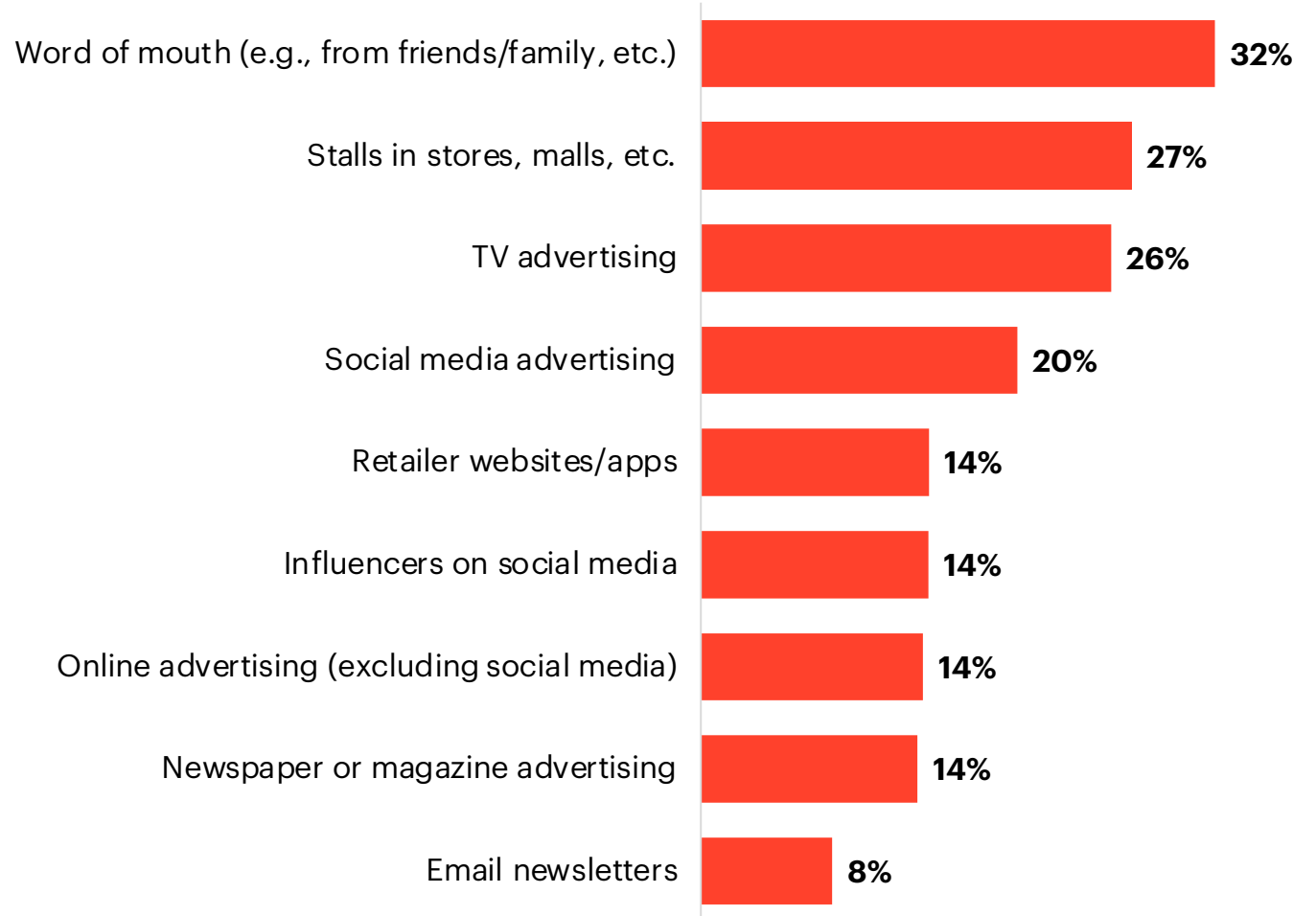


How skincare consumers discover new products

Word of mouth is the leading way that skincare consumers in France discover new products (**32%**), followed by stalls in stores/malls (**27%**), and TV advertising (**26%**).

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How do you usually find out about new skincare products? Please select all that apply*.



YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n>750).

*Don't know and None of these option not shown.

Stalls in stores have significant influence with Gen Z consumers

Influencers on social media and online advertising are also significant discovery drivers for Gen Z skincare consumers compared to other age groups.

How do you usually find out about new skincare products? Please select all that apply.

Gen Z

Discovery method	% of respondents
1 Stalls in stores/malls ▲	39%
2 Social media advertising	35%
3 Word of mouth	34%
4 Influencers on social media ▲	33%
5 Online advertising (excluding social media) ▲	29%

Millennial

Discovery method	% of respondents
1 Word of mouth	33%
2 TV advertising	26%
3 Stalls in stores/malls ▼	25%
4 Social media advertising	24%
5 Influencers on social media ▼	21%

Gen X

Discovery method	% of respondents
1 Word of mouth	30%
2 TV advertising	29%
3 Stalls in stores/malls ▼	24%
4 Social media advertising ▼	17%
5 Retailer websites/apps ▼	12%

Baby Boomer

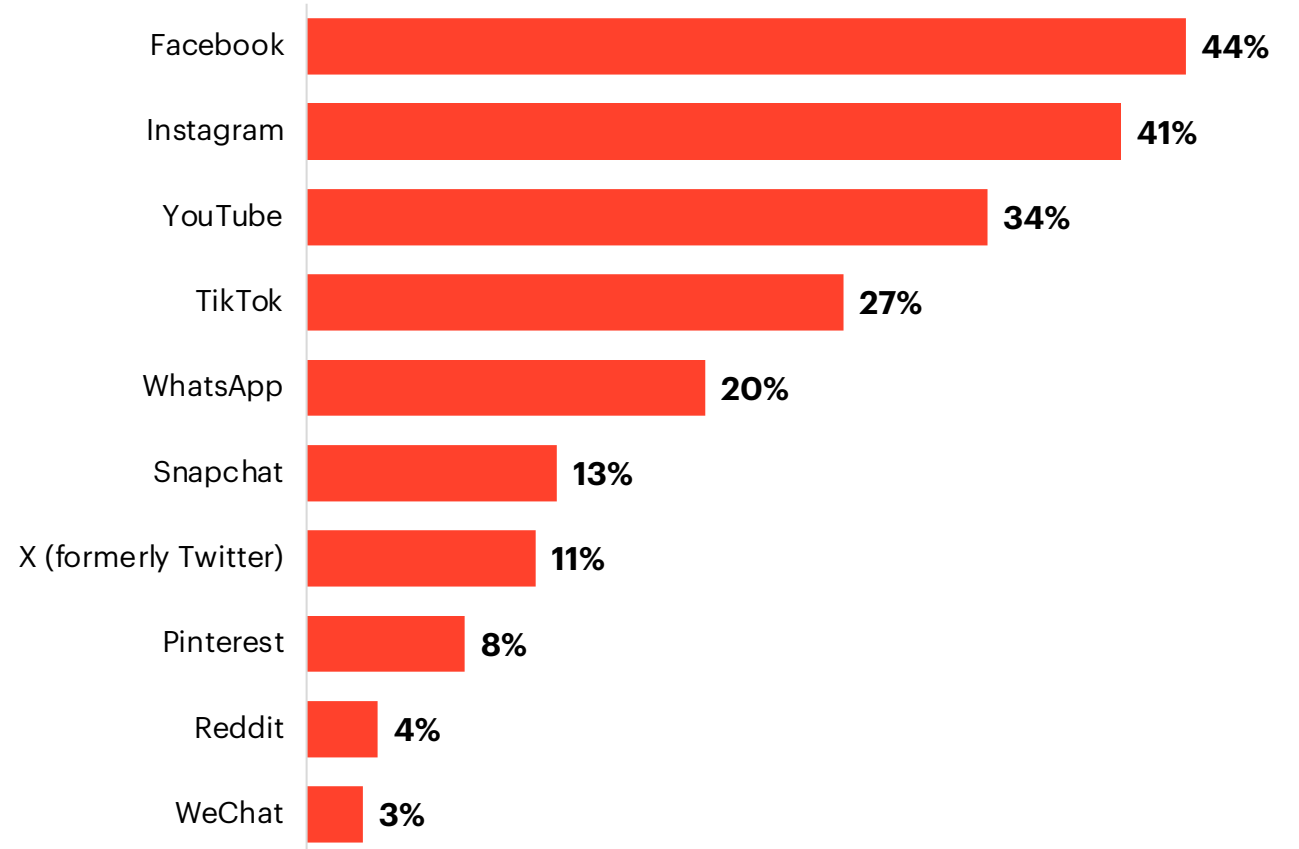
Discovery method	% of respondents
1 Word of mouth	34%
2 Stalls in stores/malls ▼	25%
3 TV advertising	23%
4 Newspaper or magazine advertising	16%
5 Online advertising (excluding social media) ▼	9%

Facebook is the leading digital platform for discovering new skincare products

44% of skincare consumers in France usually discover new skincare products on Facebook, followed by Instagram (41%) and YouTube (34%).

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Which digital platforms, if any, do you usually discover new skincare products on? Please mark all that apply*.



YouGov Surveys: September 13 - October 1, 2024, FR. People in France who purchase skincare products (n>750).

*Don't know and N/A not shown.

Skincare and cosmetics brand rankings

Exploring the top 10 skincare and cosmetics brands based on consideration among beauty consumers, with deep dives by generation and gender.



Top skincare and cosmetic brands among beauty consumers

Explore more data



Rank	Brand	% considering
1	NIVEA	37.8%
2	Yves Rocher	37.1%
3	L'Oréal Paris	32.1%
4	La Roche-Posay	29.1%
5	Sephora	27.8%
6	Avène	26.5%
7	Dior	22.5%
8	Nuxe	22.0%
9	Garnier	20.5%
10	Chanel	18.4%

YouGov BrandIndex: December 1, 2023 – November 30, 2024, FR. Beauty consumers (n>6,000).

Beauty consumers: Those who are very likely or likely to buy a beauty product in the next 3 months.

Question: If you had to buy brands from the cosmetics and beauty products universe, which ones would you consider among those listed below?

Increasingly considered skincare and cosmetics brands

Explore more data

Rank	Brand	% considering 2024	% considering 2023	Change in consideration
1	Dior	22.5%	20.6%	+1.9
2	Ducray	8.7%	6.9%	+1.8
3	Erborian	7.7%	5.9%	+1.8
4	L'Oréal Paris	32.1%	30.6%	+1.5
5	Sephora	27.8%	26.5%	+1.3
6	Kiko	13.8%	12.5%	+1.3
7	A-Derma	9.9%	8.6%	+1.3
8	Yves Saint Laurent (YSL)	17.5%	16.6%	+0.9
9	Avène	26.5	25.7	+0.8
10	Marionnaud	15.1	14.3	+0.8

YouGov BrandIndex: December 1, 2023 – November 30, 2024, FR. Beauty consumers (n>5,800).

Beauty consumers: Those who are very likely or likely to buy a beauty product in the next 3 months.

Question: If you had to buy brands from the cosmetics and beauty products universe, which ones would you consider among those listed below? **Green font** indicates statistically significant increase this year compared to previous year.



Top skincare and cosmetic brands by gender

Explore more data



Men			Women		
Rank	Brand	% considering 2024	Rank	Brand	% considering 2024
1	NIVEA	47.3%	1	Yves Rocher	37.8%
2	Yves Rocher	36.1%	2	La Roche-Posay	34.0%
3	L'Oréal Paris	32.3%	3	L'Oréal Paris	32.0%
4	Dior	29.8%	4	Avène	31.3%
5	Sephora	24.9%	5	NIVEA	30.8%
6	Chanel	23.5%	6	Sephora	30.0%
7	Garnier	22.9%	7	Nuxe	26.8%
8	La Roche-Posay	22.5%	8	Kiko	20.2%
9	Yves Saint Laurent (YSL)	20.8%	9	Caudalie	19.7%
10	Avène	20.0%	10	Maybelline	19.2%

YouGov BrandIndex: December 1, 2023 – November 30, 2024, FR. Beauty consumers (n>2,500).

Beauty consumers: Those who are very likely or likely to buy a beauty product in the next 3 months.

Question: If you had to buy brands from the cosmetics and beauty products universe, which ones would you consider among those listed below?

Top skincare and cosmetic brands by generation

Gen Z

Rank	Brand	% considering 2024
1	Sephora	41.4%
2	Yves Rocher	41.3%
3	NIVEA	37.5%
4	L'Oréal Paris	29.3%
5	La Roche-Posay	28.4%
6	Dior	26.1%
7	Kiko	23.4%
8	Chanel	23.2%
9	Avène	21.4%
10	Yves Saint Laurent (YSL)	21.1%

Millennial

Rank	Brand	% considering 2024
1	NIVEA	37.4%
2	Yves Rocher	37.0%
3	L'Oréal Paris	33.3%
4	Sephora	30.1%
5	La Roche-Posay	29.2%
6	Avène	27.5%
7	Dior	25.4%
8	Nuxe	24.2%
9	Bioderma	19.7%
10	Garnier	19.5%

Gen X

Rank	Brand	% considering 2024
1	Yves Rocher	39.1%
2	NIVEA	36.5%
3	L'Oréal Paris	32.4%
4	La Roche-Posay	31.1%
5	Avène	29.2%
6	Sephora	26.1%
7	Nuxe	23.9%
8	Garnier	22.4%
9	Dior	19.7%
10	Bioderma	19.5%

Baby Boomer

Rank	Brand	% considering 2024
1	NIVEA	39.6%
2	Yves Rocher	33.3%
3	L'Oréal Paris	31.9%
4	La Roche-Posay	27.1%
5	Avène	25.6%
6	Garnier	20.8%
7	Nuxe	20.3%
8	Dior	20.0%
9	Sephora	19.9%
10	Vichy	18.5%

YouGov BrandIndex: December 1, 2023 – November 30, 2024, FR. France beauty consumers (n>850).

Beauty consumers: Those who are very likely or likely to buy a beauty product in the next 3 months.

Question: If you had to buy brands from the cosmetics and beauty products universe, which ones would you consider among those listed below?

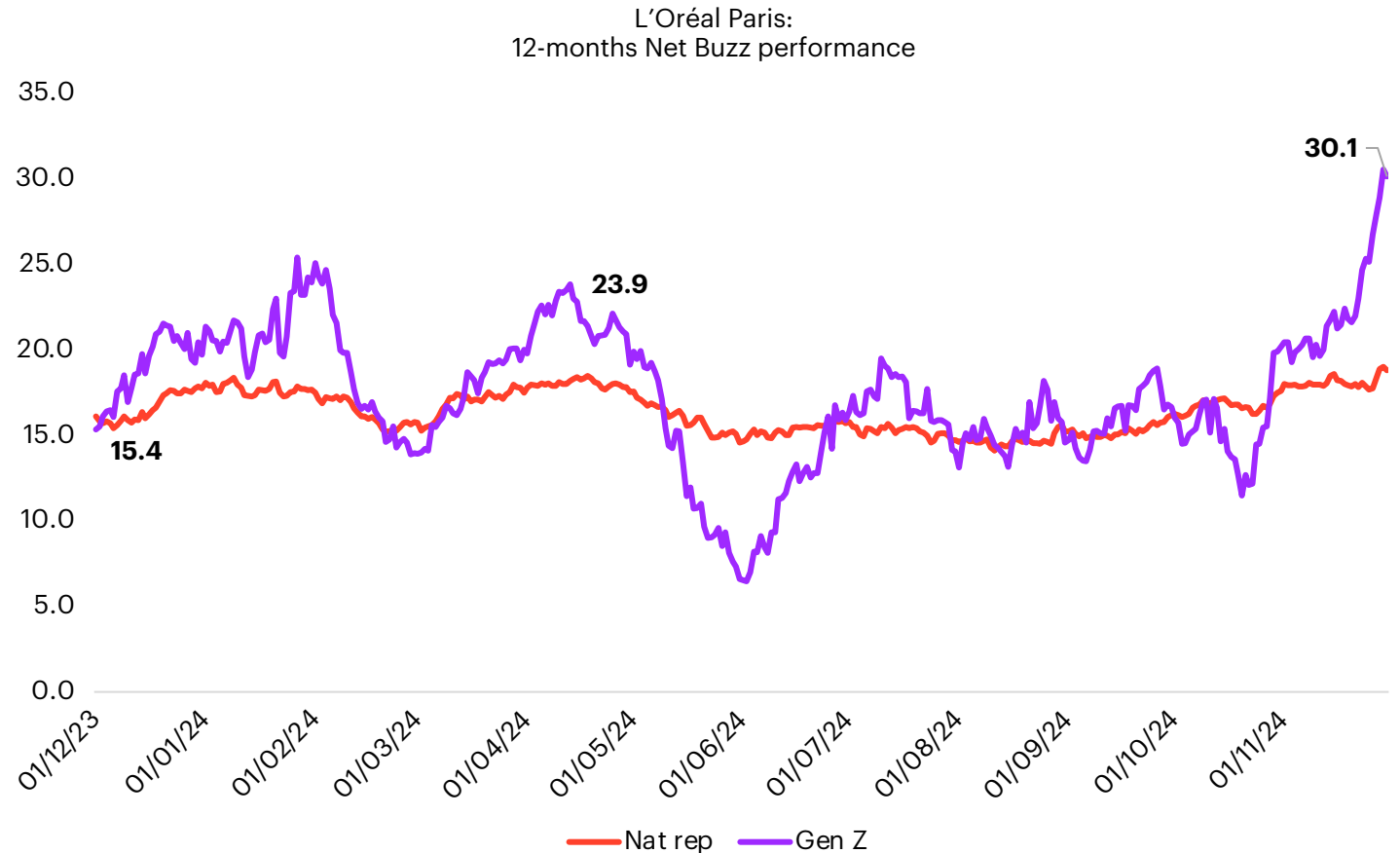
Performance deep dive: L'Oréal Paris

Exploring Net Buzz and Consideration performance for L'Oréal Paris among Gen Z in France.



L'Oréal Paris: Generating buzz among Gen Z in France

While L'Oréal Paris's Net Buzz score among the general population recorded steady growth in 2024, Gen Z experienced a significant surge in the last quarter of 2024, with a peak to 30.1 percentage points in November.

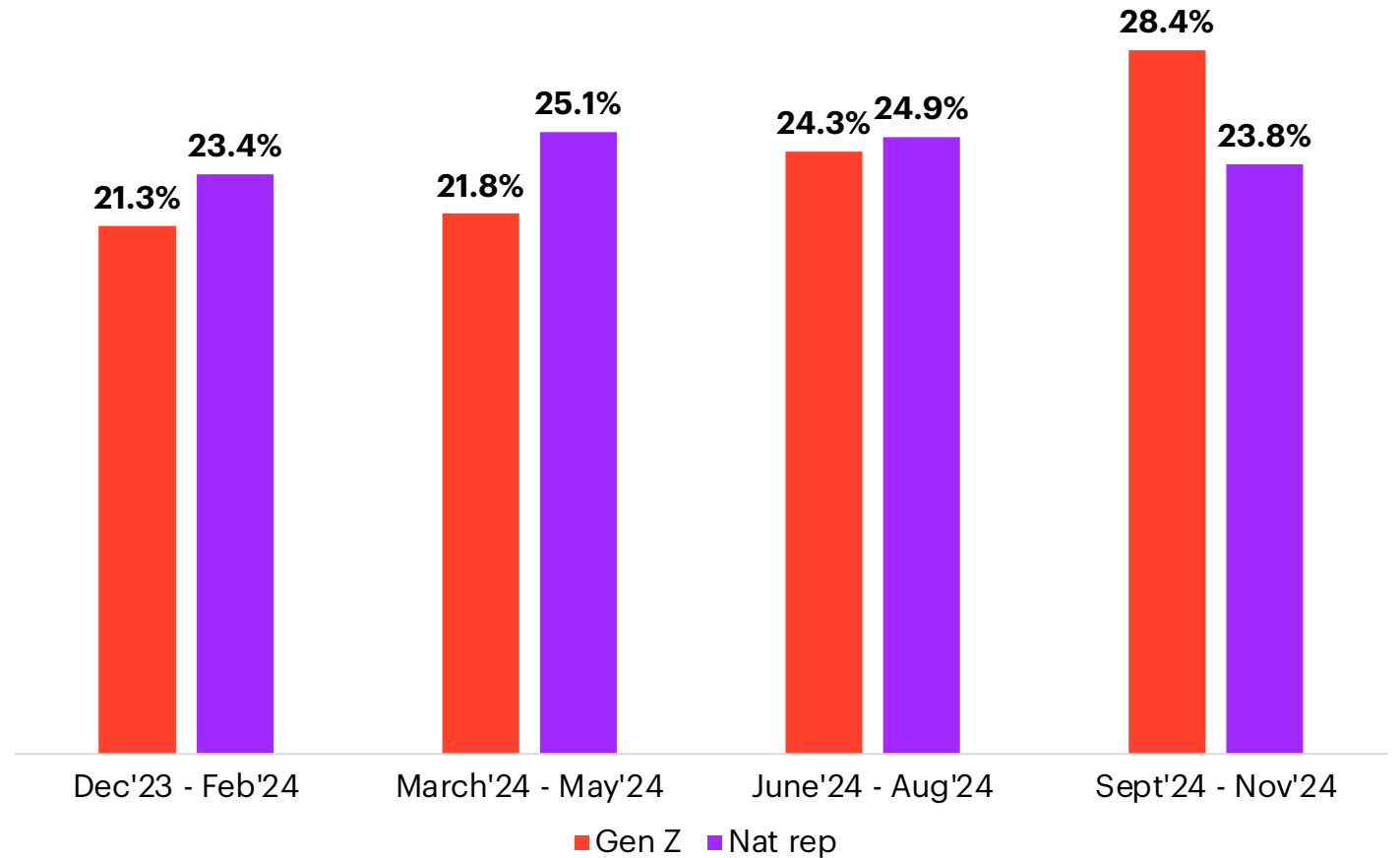


YouGov BrandIndex: December 1, 2023 – November 30, 2024, FR (n>180). *8 weeks moving average is applied. Net Buzz scores are determined by respondents' answers to: "In the last two weeks, which cosmetics and beauty product brands have you seen, read, or heard something positive about (whether in the news, through advertising, on the internet, or in conversations with others)?" minus answers to: "Now, which cosmetics and beauty product brands have you seen, read, or heard something negative about in the last two weeks?"

L'Oréal Paris: A surge in Gen Z consideration

L'Oréal Paris saw a significant increase in consideration among Gen Z in France in the 2nd half of 2024, recording a 7.1 percentage-point increase.

L'Oréal Paris:
Consideration performance



YouGov BrandIndex: December 1, 2023 – November 30, 2024, FR. (n>380). *Quarterly moving average is applied.

Build a complete picture of your brand

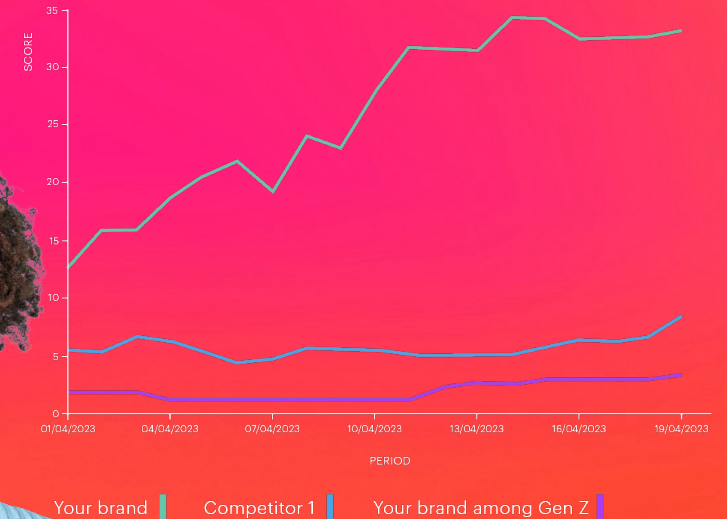
Gain a deep understanding of your brand health and performance against top competitors in your industry with YouGov's brand and campaign tracking solutions.

Track key metrics, measure campaign effectiveness, and access real-time insights into what people think, feel, and say about your brand.

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Advertising awareness



Metrics ▾

Advertising awareness

Methodology

The insights in this report have been sourced via YouGov Surveys: Serviced, YouGov Profiles and YouGov BrandIndex.

The consumer insights in this report were sourced via YouGov Surveys: Serviced – providing rapid answers from the right audience.

The multi-region survey was conducted from 13th September to 1st October 2024, with 780 FR respondents.

The target group of "Skincare consumers in France" is determined by those who answered the question: In general, what are the main reasons you purchase skincare products? (excludes those who selected "N/A - I do not purchase skincare products")

The brand rankings in this report are sourced from YouGov's always-on brand tracker, YouGov BrandIndex.

The target group of "Beauty consumers" is determined by those who answered very likely or likely to "Would you like to buy a beauty product for 3 months now?"

A minimum base size of 300 (N) is required. All scores have been rounded to a single decimal place.

For improvers, brands are ranked based on their change in scores. In cases where the change in scores is the same, the current scores are used as a secondary metric to determine their ranking. Scores are rounded to the nearest decimal point, and differences are determined from those rounded scores.

Consideration scores are based on respondents' answers to the following question: "If you had to buy brands from the cosmetics and beauty products universe, which ones would you consider among those listed below?"

Net Buzz scores are determined by respondents' answers to: "In the last two weeks, which cosmetics and beauty product brands have you seen, read, or heard something positive about (whether in the news, through advertising, on the internet, or in conversations with others)?" minus answers to: "Now, which cosmetics and beauty product brands have you seen, read, or heard something negative about in the last two weeks?"

Throughout the report, each generation is defined as: Gen Z (1997 or later), Millennial (1981-1996), Gen X (1965-1980) and Baby Boomer (1946-1964).



Thank you

/Research Reality

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