

Research Report: Moisturizers Skin Care (US)

Background

We are conducting a study on moisturizers within the skincare market in the United States. This research aims to provide insights into the usage trends, frequency, patterns, dependencies, and segmentation of moisturizer users.

Objectives

1. Usage Trends: Identify the key trends in the use of moisturizers.
2. Frequency & Patterns: Determine how often and in what patterns consumers use moisturizers.
3. Dependencies: Understand if consumers use moisturizers independently or in conjunction with other skincare products.
4. Segmentation: Segment the moisturizer users based on demographics, psychographics, and behavioral factors.

Target Group

- Region: United States
- Demographics: All consumers who use moisturizers, including various age groups, genders, and income levels.

Findings

1. Usage Trends

1. **Clean Beauty and Natural Ingredients** Consumers are increasingly seeking moisturizers that are free from harmful chemicals, parabens, sulfates, and synthetic fragrances. Ingredients like hyaluronic acid, aloe vera, shea butter, and plant-based oils are highly favored. Brands that emphasize transparency and sustainability in their ingredient sourcing are gaining popularity.
1. **Personalized Skincare** Personalized skincare is on the rise, with brands offering customized moisturizer formulations based on individual skin types, concerns, and even genetic information. Companies like Curology and SkinCeuticals provide tailored skincare solutions that cater to specific needs.

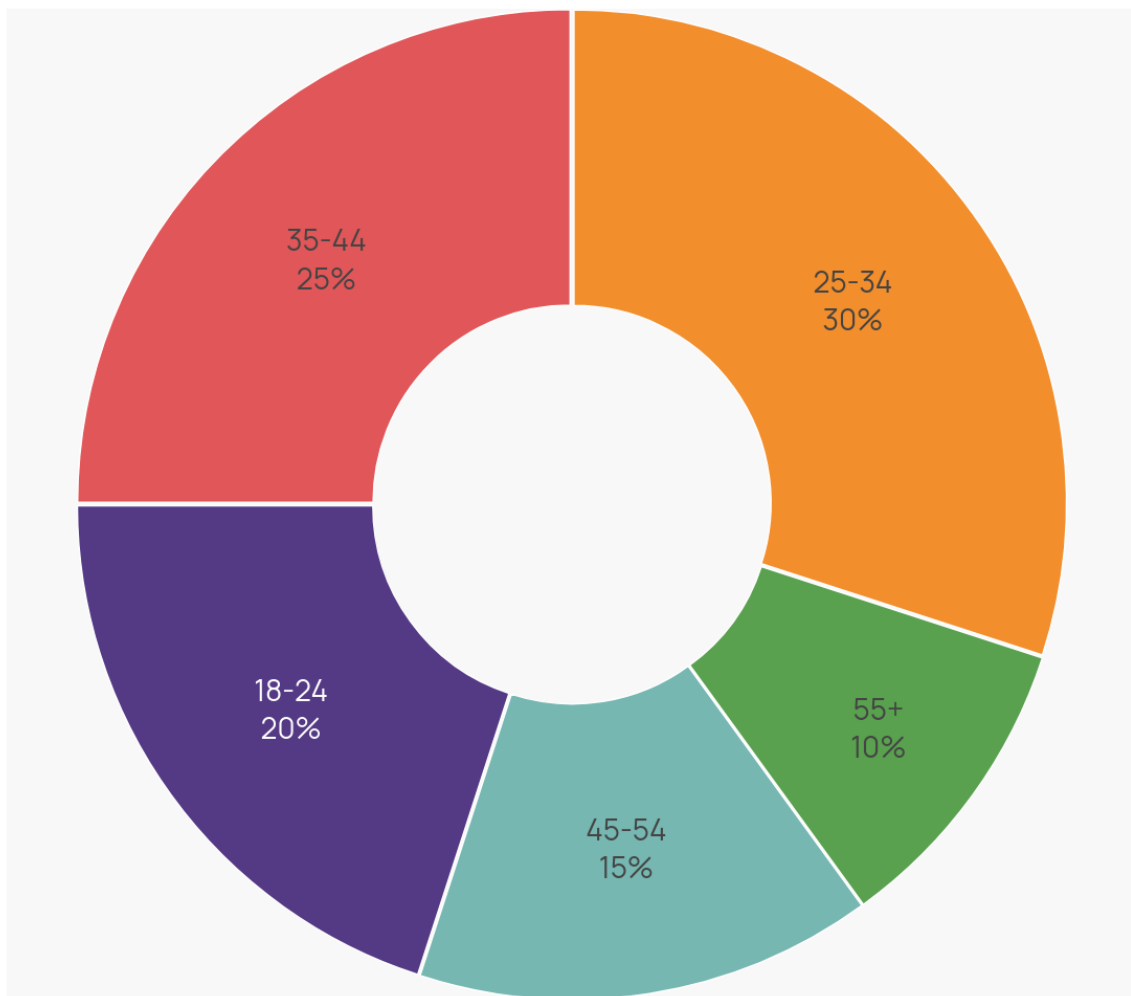
2. **Multi-Functional Products** There is a growing demand for moisturizers that offer multiple benefits beyond hydration. Products that combine moisturizing with anti-aging, SPF protection, or skin-brightening properties are particularly popular. This trend is driven by consumers looking for convenience and efficiency in their skincare routines.
3. **Sustainable and Eco-Friendly Packaging** Sustainability is a significant concern for many consumers. Brands are responding by using recyclable, biodegradable, or refillable packaging. Companies like Lush and Fenty Skin are leading the way in offering eco-friendly packaging options.
4. **CBD-Infused Moisturizers** CBD (cannabidiol) has made its way into the skincare industry, with many consumers seeking its purported anti-inflammatory and soothing benefits. CBD-infused moisturizers are becoming more mainstream, appealing to those looking for natural remedies for skin issues like acne, eczema, and psoriasis.
5. **K-Beauty and J-Beauty Influence** Korean and Japanese beauty trends continue to influence the American market. Products that emphasize hydration, such as water-based gels and creams, are particularly popular. Ingredients like snail mucin, green tea, and rice extract are commonly featured in these products.
6. **Tech-Enhanced Skincare** The integration of technology in skincare is another emerging trend. Devices that enhance the absorption of moisturizers, such as facial rollers, LED masks, and microcurrent devices, are becoming more common. Additionally, apps that analyze skin conditions and recommend products are gaining traction.
7. **Focus on Barrier Repair** There is a growing awareness of the importance of maintaining a healthy skin barrier. Moisturizers that focus on barrier repair, containing ingredients like ceramides, niacinamide, and fatty acids, are in high demand. These products aim to protect the skin from environmental stressors and prevent moisture loss.
8. **Inclusivity and Diversity** Brands are increasingly recognizing the need for products that cater to a diverse range of skin tones and types. Moisturizers that address specific concerns for different ethnicities, such as hyperpigmentation or sensitivity, are becoming more available.
9. **Minimalist Skincare** The "skinimalism" trend, which promotes a minimalist approach to skincare, is gaining popularity. Consumers are opting for

fewer, but more effective, products. This trend emphasizes the use of high-quality, potent ingredients and streamlined routines.

- The moisturizer market in the United States is a robust one, valued at \$10 billion and growing at a rate of 5% annually. Moisturizers are used by a large proportion of the population, with 80% of consumers indicating they use them.
- The market is dominated by women, who account for 75% of moisturizer users. Consumers are spending an average of \$50 per month on moisturizers.
- The majority of moisturizer users (60%) are between the ages of 25 and 34. The most popular types of moisturizers include face moisturizers (60%), body moisturizers (25%), and hand creams (10%).
- Consumers are increasingly seeking natural and organic ingredients in their moisturizers, with 40% and 20% respectively indicating a preference for these ingredients.
- There is also a strong demand for moisturizers with SPF (50%) and hyaluronic acid (35%). Consumers are purchasing moisturizers primarily online (50%) and in-store (30%).
- Most consumers use moisturizers on a daily basis (60%), and 90% use them in conjunction with other skincare products.
- Consumers are using moisturizers for a variety of skin concerns, including acne (20%), dryness (40%), and anti-aging (30%). [1]

Distribution of moisturizer users by age group

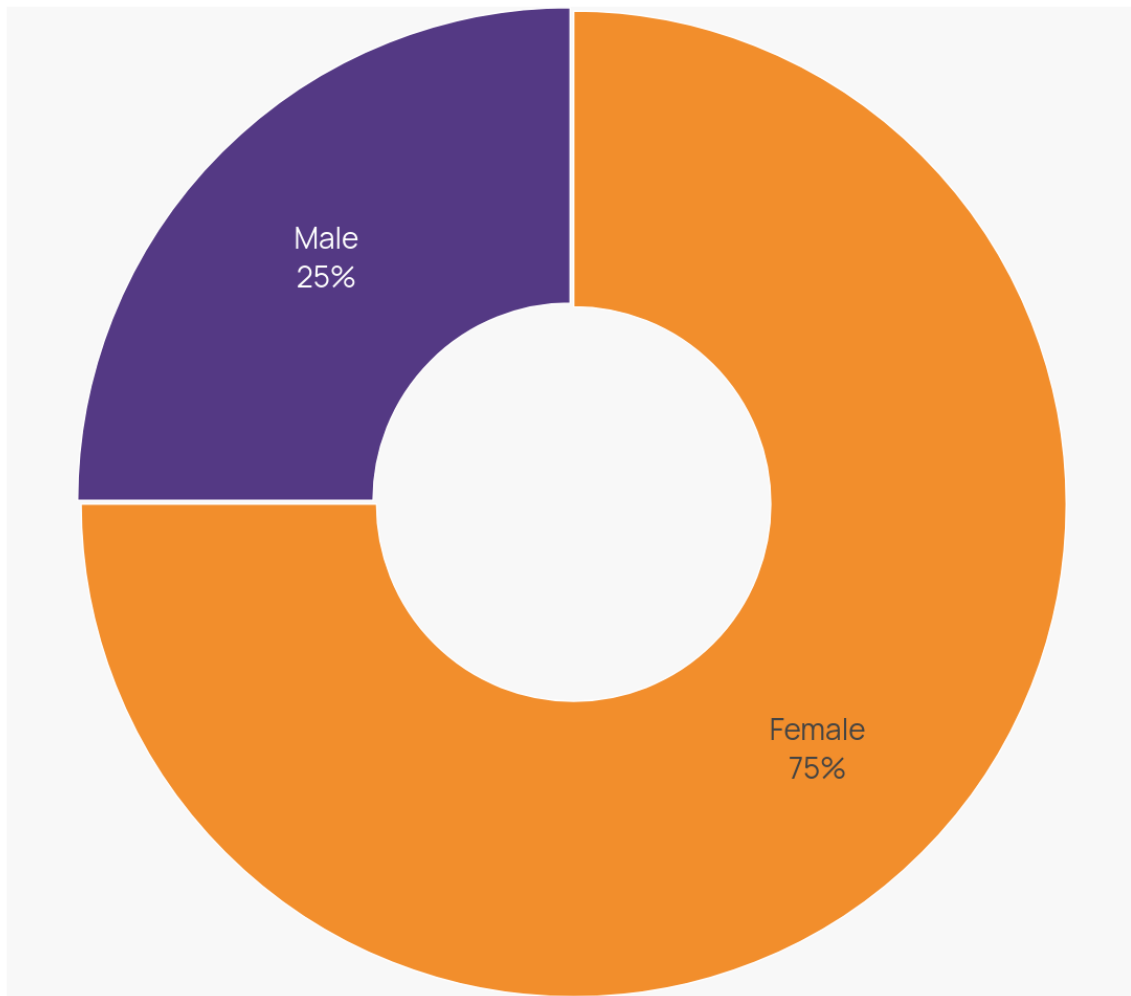
DISTRIBUTION OF MOISTURIZER USERS BY AGE GROUP



[2]

Distribution of moisturizer users by gender

DISTRIBUTION OF MOISTURIZER USERS BY GENDER

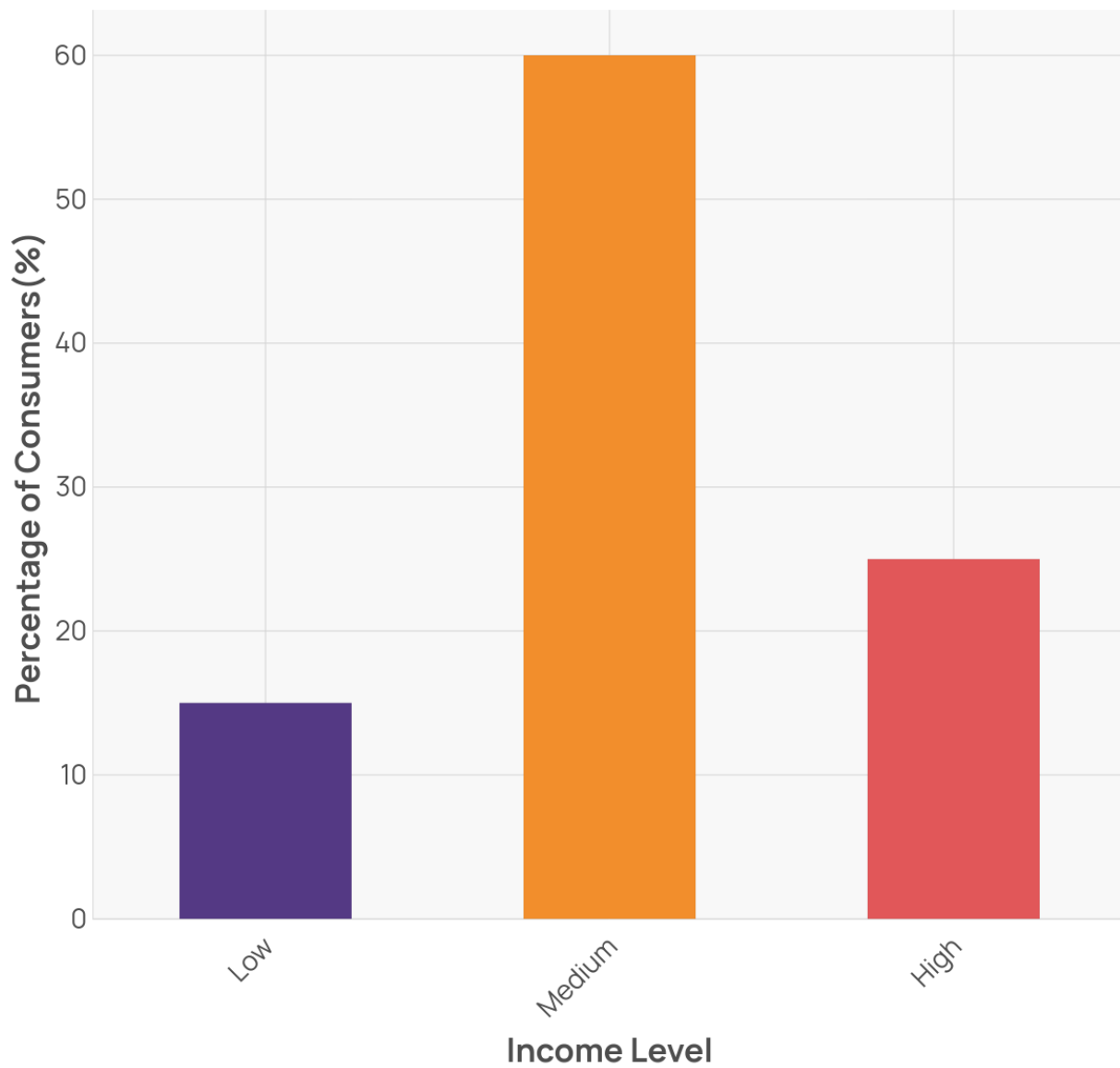


■ Female ■ Male

[2]

Distribution of moisturizer users by income level

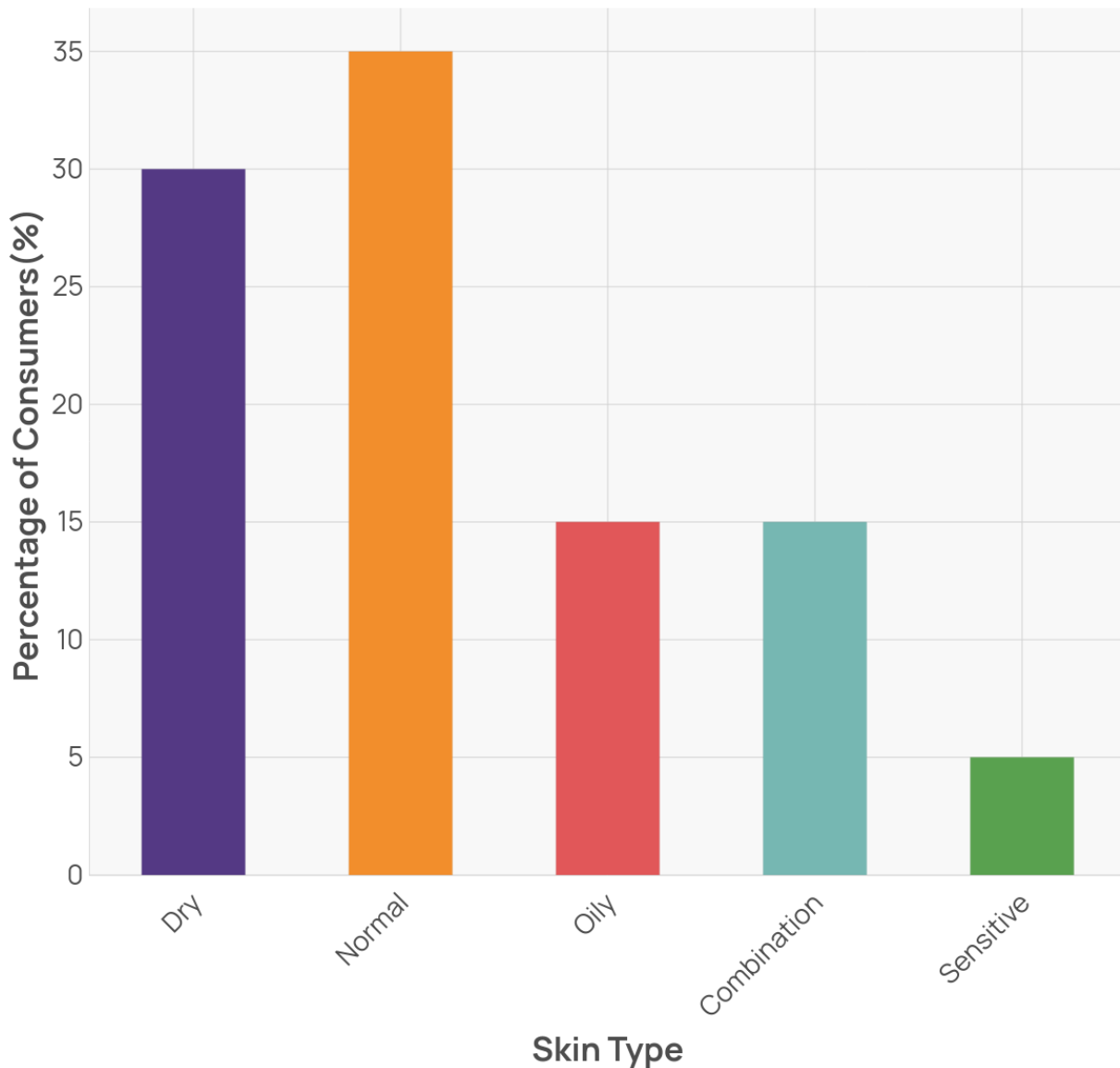
DISTRIBUTION OF MOISTURIZER USERS BY INCOME LEVEL



[2]

Distribution of moisturizer users by skin type

DISTRIBUTION OF MOISTURIZER USERS BY SKIN TYPE



[2]

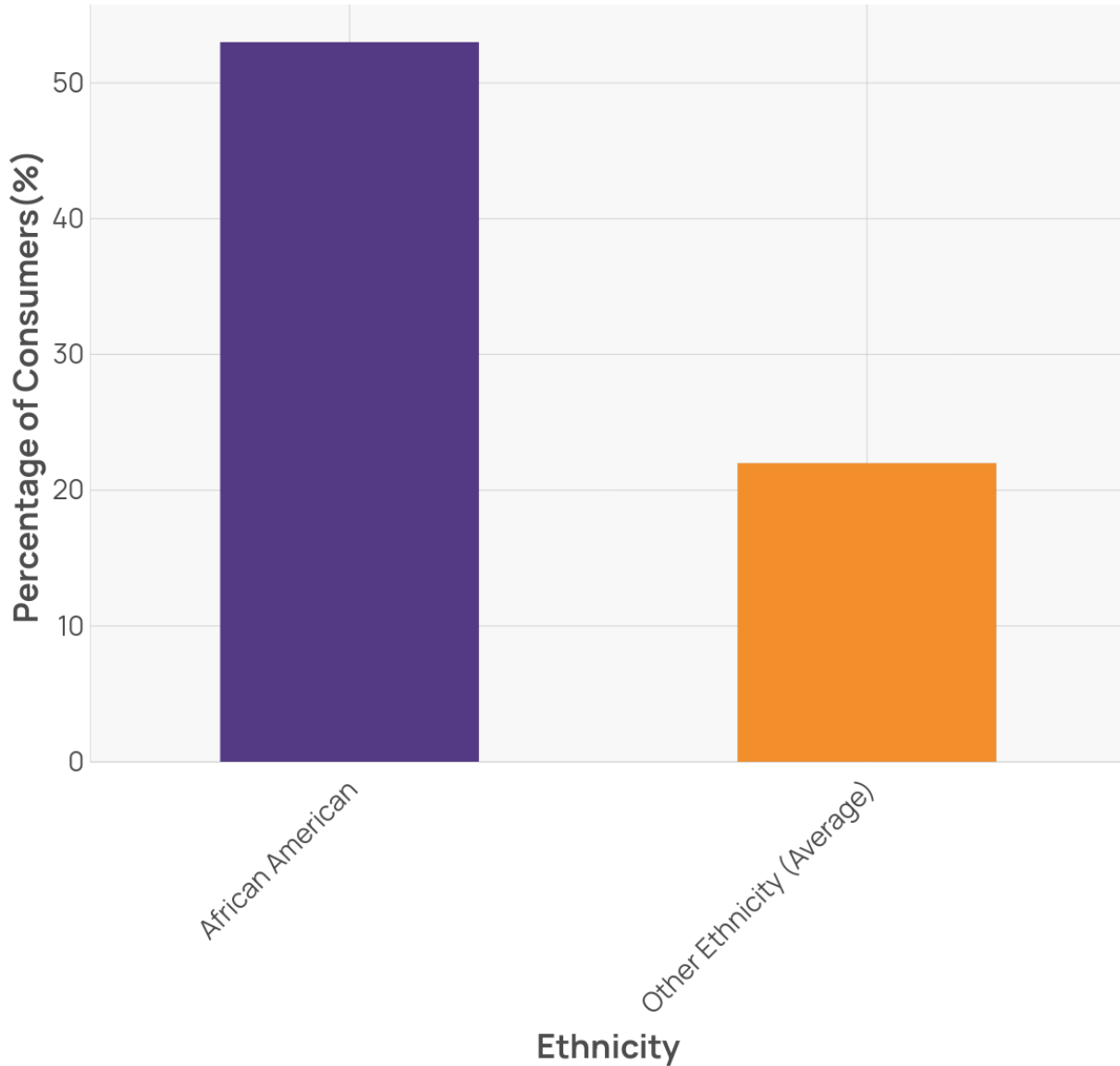
2. Frequency & Patterns

- According to a Statista survey conducted in June 2017, 30% of male U.S. consumers reported using body lotion every day. Another Statista survey from the same period indicated that 51% of African American male respondents reported using body lotion every day. The surveys also show varying frequencies of use among different ethnic groups and usage patterns, such as multiple times a week, once a week, 2-3 times a month, once a month, less often, or never [3].
- Approximately 30% of male U.S. consumers use body lotion every day. Usage varies by ethnicity, with 51% of African American males using body lotion every

day compared to lower percentages in other ethnic groups. Other frequent usage patterns include multiple times a week (20%) and once a week (10%) [4].

Daily body lotion use among male U.S. consumers by ethnicity

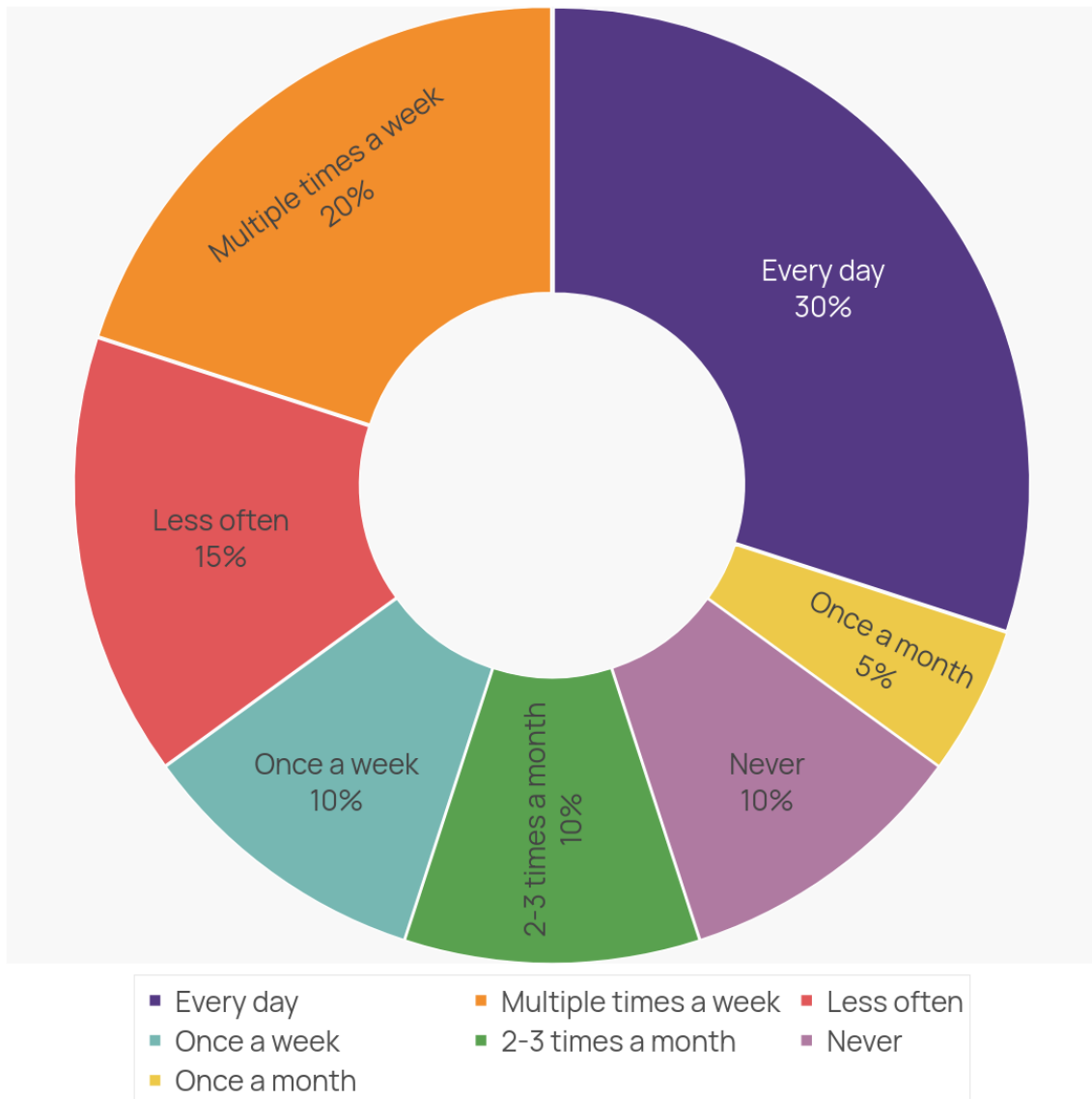
DAILY LOTION USE AMONG MALE U.S. CONSUMERS BY ETHNICITY



[4]

Frequency of body lotion use among male U.S. consumers

FREQUENCY OF BODY LOTION USE AMONG MALE U.S. CONSUMERS



[4]

Moisturizer usage is common among various racial and ethnic groups in the United States. The most frequently used skincare product overall is moisturizer or body lotion, with an average usage of 5.3 days per week.

- African American women use body lotion and body shea/cocoa butter most frequently compared to other groups.
- Asian women are less likely to use moisturizers compared to other racial/ethnic groups.
- Hispanic women also use moisturizers frequently, but specific data on their exact frequency compared to other groups is not detailed.
- White women have a high frequency of moisturizer usage, but specific comparative data is not provided.

- Mixed Race women's usage patterns are not detailed due to a smaller sample size in the study.
- The mean frequency of moisturizer use per week is consistent across all racial/ethnic groups at approximately 5.3 days per week. All surveyed women, regardless of racial/ethnic group, reported using moisturizers at least once per week, indicating a high prevalence of moisturizer use among the sample population.[5]

3. Dependencies

- A vast majority of consumers in the United States, 90%, use moisturizers in conjunction with other skincare products. This is evident in the high percentages of consumers using moisturizers with cleansers (65%), sunscreen (75%), and even exfoliants (25%).
- While there are 10% who use moisturizers independently, the vast majority integrate them into their skincare routines alongside other products, indicating a preference for multi-step skincare regimens. This suggests a comprehensive approach to skincare, where consumers look to address various concerns by combining different products. [6]
- Commonly used skincare products alongside moisturizers by consumers in the United States include:
 - Eye Creams: Used to target specific concerns around the delicate eye area such as dark circles, puffiness, and fine lines.
 - Facial Cleansers: Essential for removing dirt, oil, and makeup from the skin, preparing it for other skincare products.
 - Facial Serums: Concentrated formulations that target specific skin concerns like aging, hyperpigmentation, and hydration.
 - Sunscreens: Protect the skin from harmful UV rays and prevent sunburn and premature aging.
 - Makeup Removers: Used to effectively remove makeup without stripping the skin of its natural oils.
 - Body Cleansers: Used to cleanse the body while maintaining skin hydration.
 - Body Moisturizers: Applied to keep the skin on the body hydrated and smooth.

- Ointments: Used for targeted treatment of specific skin conditions like eczema or extremely dry patches.

These products are often recommended by dermatologists and are part of a comprehensive skincare routine aimed at maintaining healthy skin. [6]

4. Segmentation

4.1 How does moisturizer usage differ among various age groups in the United States?

Based on the data provided, moisturizer usage among various age groups in the United States shows distinct patterns and preferences:

- **18-24 Age Group:**

- Prefers lightweight, non-greasy moisturizers that absorb quickly.
- Focuses on products that provide hydration without causing breakouts.
- Example: A user in this age group praised a moisturizer for being lightweight and non-greasy.

- **25-34 Age Group:**

- Looks for products that address specific skin concerns like acne, sensitivity, and hydration.
- Prefers products with additional benefits like SPF protection and anti-aging properties.
- Example: Multiple users in this age group mentioned using moisturizers that help with sensitive skin and provide SPF protection.

- **35-44 Age Group:**

- Focuses on anti-aging benefits, hydration, and products that work well under makeup.
- Prefers products that are practical and value-conscious.
- Example: Users in this age group highlighted the importance of anti-aging properties and hydration.

- **45-54 Age Group:**

- Prioritizes products that help with fine lines, wrinkles, and overall skin health.
- Looks for moisturizers that are effective yet gentle on sensitive skin.
- Example: A user in this age group mentioned the importance of reducing fine lines and wrinkles.

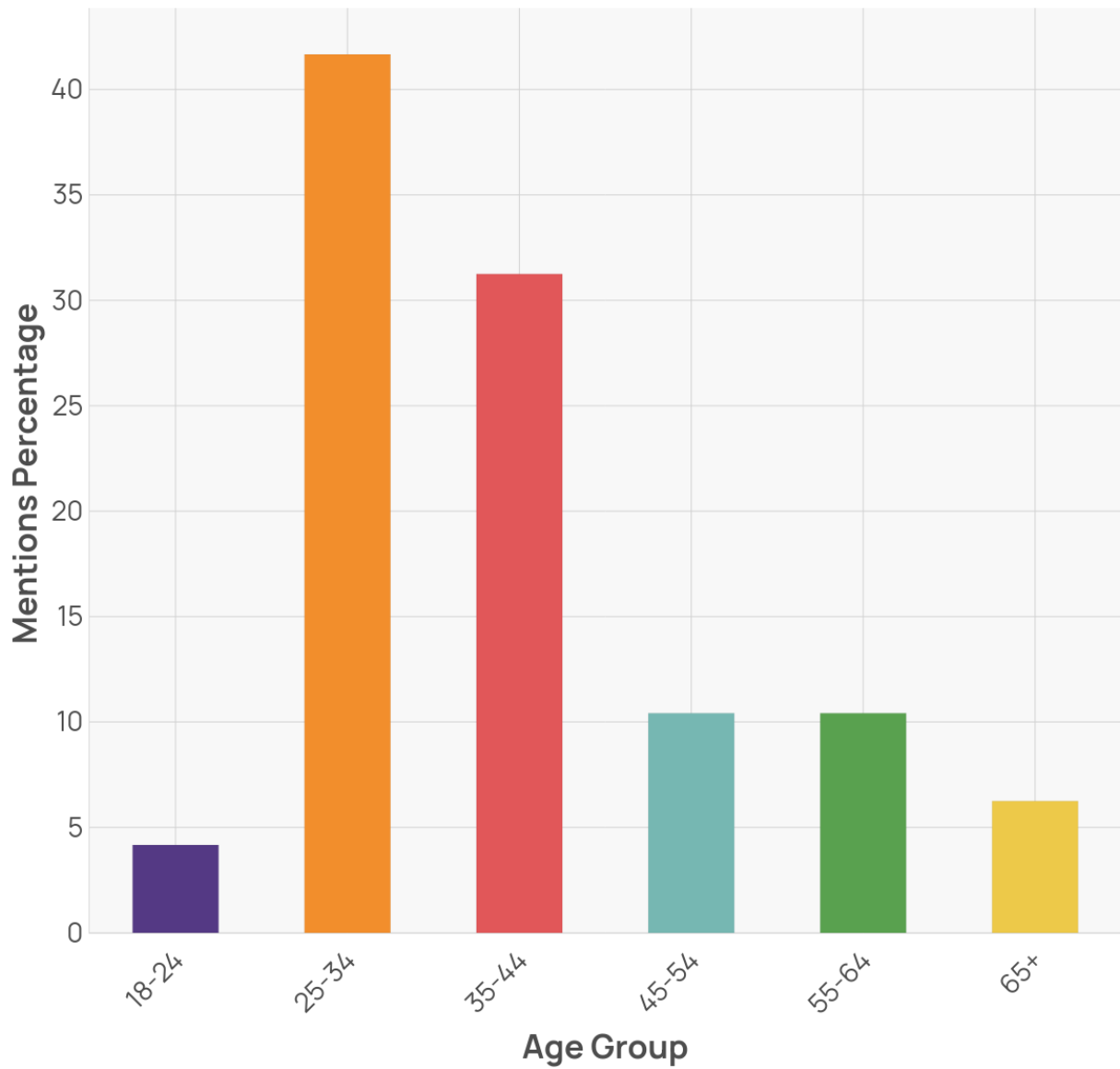
- **55-64 Age Group:**

- Seeks out products that provide deep hydration and address age-related skin concerns like dark spots and sagging skin.
- Prefers products that are gentle and do not cause irritation.
- Example: Users in this age group appreciated moisturizers that help with dark spots and provide deep hydration.

- **65+ Age Group:**

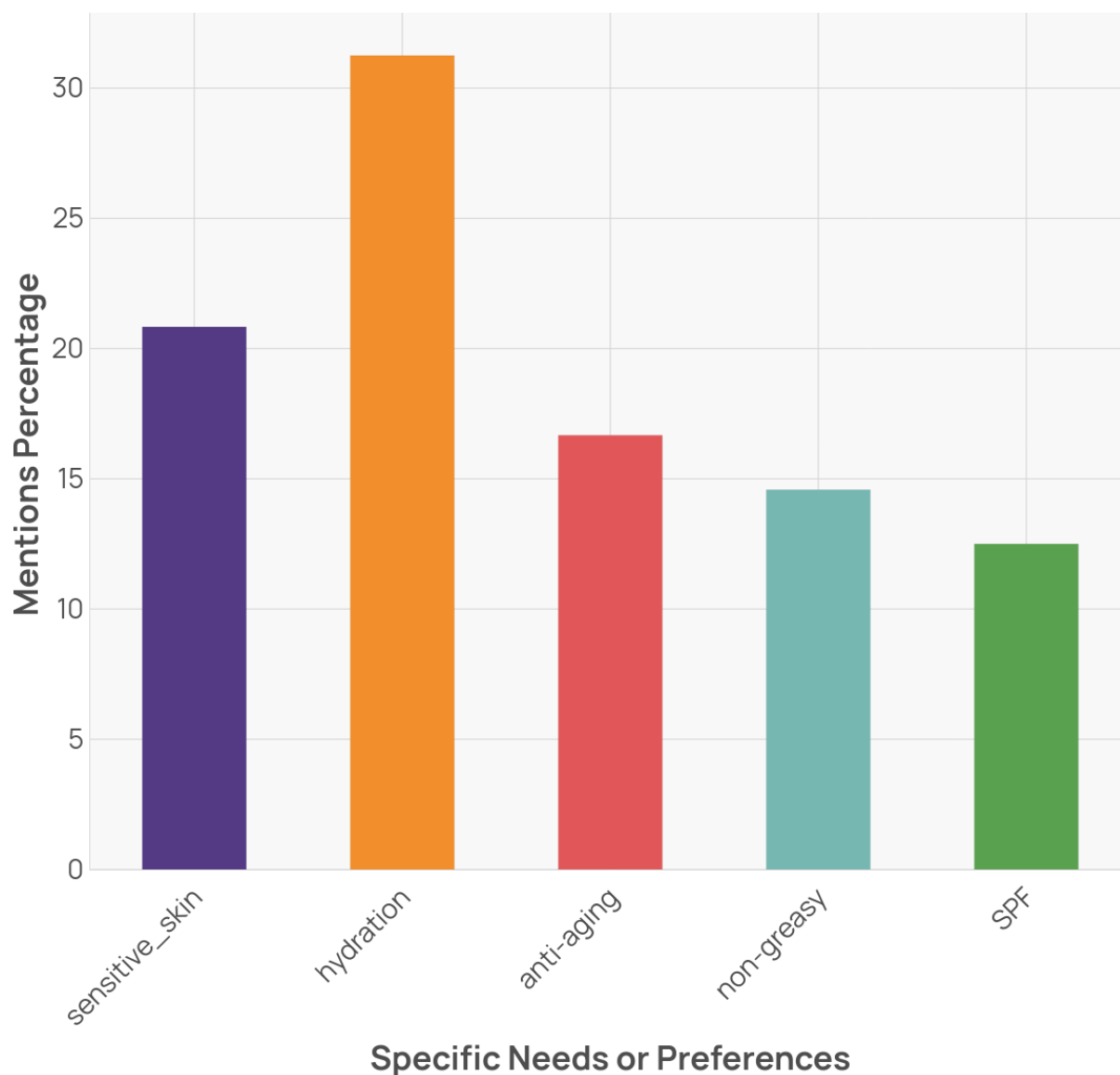
- Focuses on maintaining skin hydration and preventing dryness, especially in colder weather.
- Prefers products that are easy to apply and absorb well without leaving a greasy residue.
- Example: A user in this age group mentioned the importance of hydration and ease of application. [7]

AGE GROUP MENTIONS PERCENTAGE



Percentage mentions by age group [7]

MENTIONS OF SPECIFIC NEEDS OR PREFERENCES PERCENTAGE



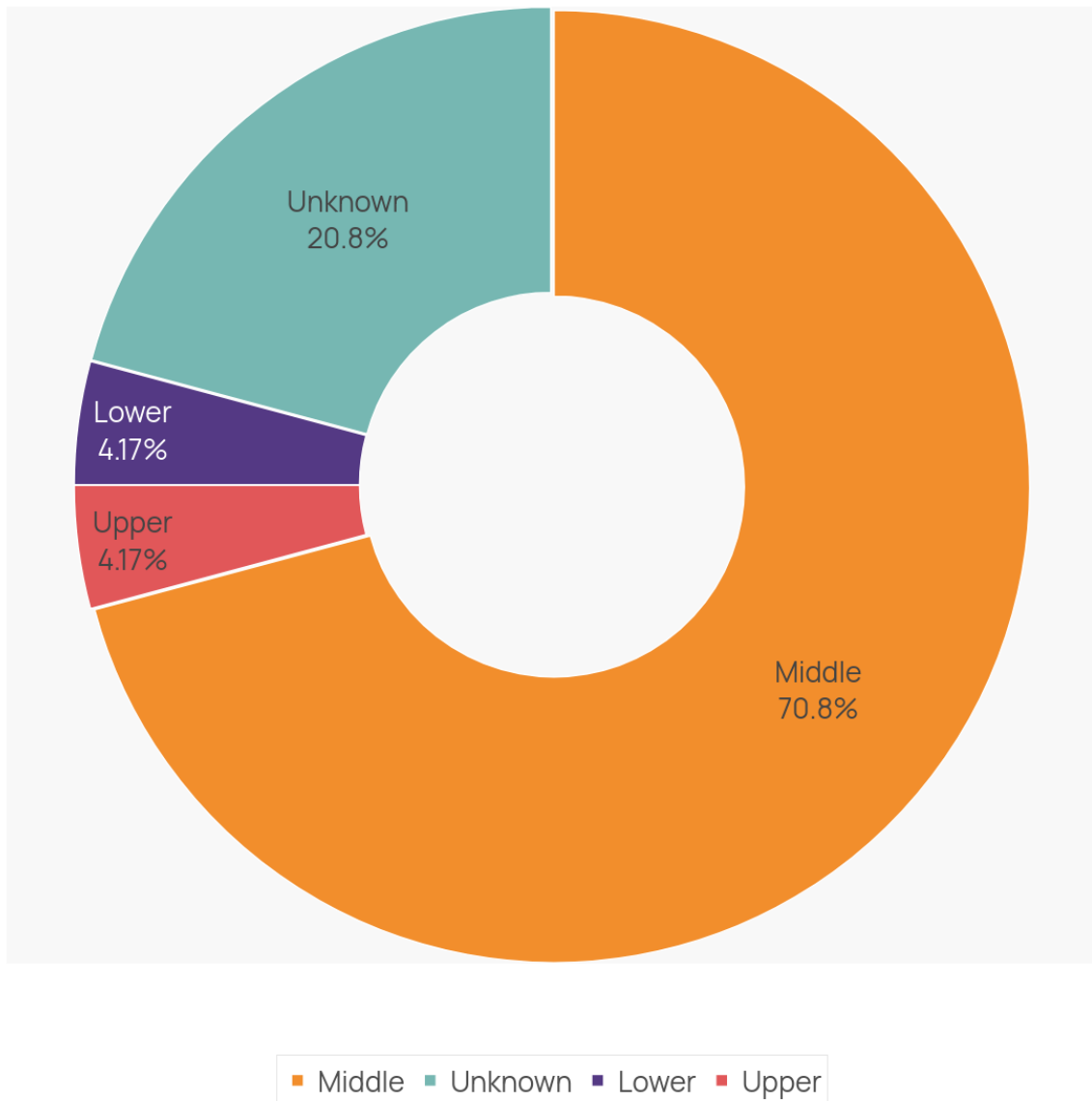
Percentage mentions of specific needs or preferences across all age groups [7]

4.2 Income Level Distribution

- The majority of moisturizer users fall into the middle-income band, accounting for approximately 70.83% of the sample. A small percentage of users are in the lower-income band, making up about 4.17%. Another small percentage of users are in the upper-income band, also at around 4.17%. There is a significant portion of users whose income band is unknown, constituting about 20.83% of the sample. [8]

Income band distribution

INCOME BAND DISTRIBUTION



[8]

4.3 Psychographic Profiles

Based on the data provided, the common psychographic profiles of moisturizer users in the United States include:

- **Health-Conscious:** Many users prioritize health and wellness, seeking products that are gentle on the skin and free from harmful ingredients.
- **Quality-Conscious:** Users often look for high-quality products that deliver effective results, even if they come at a higher price.
- **Value-Seeking:** There is a significant focus on finding products that offer good value for money, balancing cost with effectiveness.

- **Practical:** Users prefer practical and functional items that fit seamlessly into their daily routines.
- **Brand Loyalty:** Some users show strong loyalty to specific brands that they trust and have had positive experiences with.
- **Tech-Savvy:** A subset of users are knowledgeable about technology and may seek out innovative skincare solutions.
- **Family-Oriented:** Many users are family-oriented, indicating a preference for products that can be used by multiple family members or are safe for children.
- **Trend-Conscious:** Some users are aware of and follow current trends in skincare and beauty products.
- **Eco-Friendly:** A portion of users prefer products that are environmentally friendly and sustainable.
- **Appearance-Focused:** Users often seek products that improve their appearance, focusing on anti-aging benefits and overall skin health. [9]

CUSTOMER SEGMENTS BY PERCENTAGE



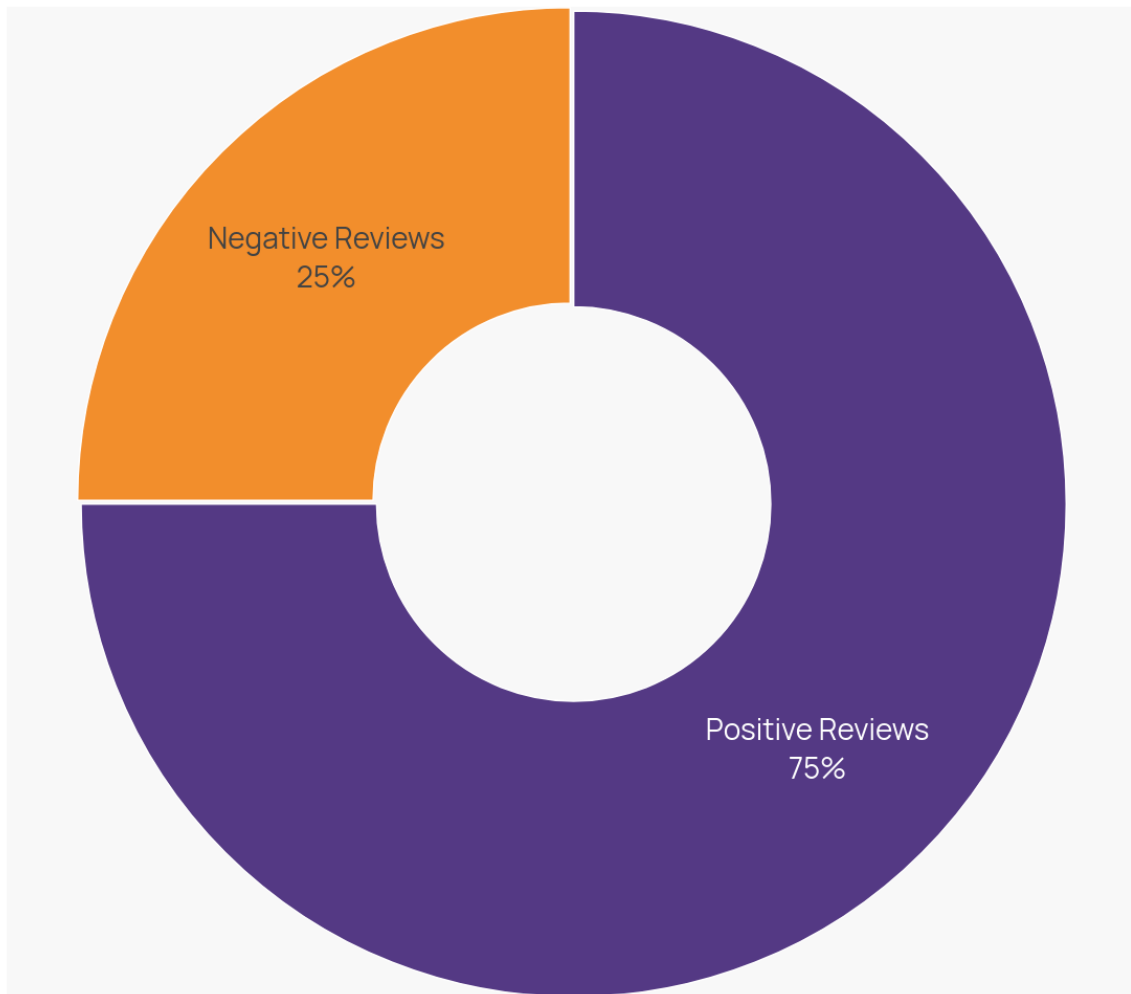
Common psychographic profiles of moisturizer users by percentage [9]

4.4 Behavioral Factors Influencing Moisturizer Usage Among Consumers in the United States

- **Skin Type and Concerns:** Many consumers choose moisturizers based on their specific skin concerns such as dryness, sensitivity, acne, rosacea, and aging. For example, users with dry skin prefer highly moisturizing products, while those with sensitive skin look for gentle, non-irritating formulas.
- **Product Ingredients:** Ingredients like hyaluronic acid, niacinamide, and oat kernel are highly valued for their moisturizing and soothing properties. Consumers also appreciate fragrance-free options to avoid irritation.

- **Effectiveness and Results:** Users are influenced by the visible results of the product, such as reduced wrinkles, improved skin texture, and overall hydration. Positive feedback on these aspects encourages continued use.
- **Price and Value:** Cost-effectiveness is a significant factor. Consumers appreciate products that offer good value for money, especially if they perform as well as or better than more expensive alternatives.
- **Brand Loyalty:** Some consumers show strong loyalty to specific brands due to consistent positive experiences with their products.
- **Packaging and Convenience:** The ease of use of the product packaging (e.g., pump dispensers) and the ability to store it conveniently are also important considerations.
- **Recommendations and Reviews:** Recommendations from dermatologists, friends, or online reviews play a crucial role in influencing purchase decisions. Positive reviews about a product's effectiveness can drive new users to try it.
- **Health Consciousness:** Many consumers prefer products that align with their health-conscious lifestyle, including those that are free from harmful chemicals and have added benefits like SPF protection. [9]

SENTIMENT ANALYSIS OF REVIEWS



■ Positive Reviews ■ Negative Reviews

Sentiment analysis of reviews related to moisturizer usage [9]

Sources and Sample Sizes

[1] USDA Economic Research Service; Barry Callebaut Group; Allure; Byrdie; Dermstore; Mintel Reports; Statista;

[2] Mintel , Nielsen , Statista ; Sample Size :10091;

[3] Statista Reports;

[4] Statista ; Sample Size :1032 ,1028;

[5] NCBI Reports , Nature Journal; Marketplace Reviews ; Sample Size :9102;

[6] Journal of Exposure Science & Environmental Epidemiology ; Sample Size :318;
CeraVe Product Information; Marketplace Metadata ; Sample Size :9,054;
Marketplace Reviews ; Sample Size :1,299; McKinsey Quarterly;

[7] Marketplace Reviews ; Sample Size :1,853;

[8] Mintel ; Sample Size :1020; Marketplace Reviews ; Sample Size :901;

[9] Marketplace Reviews ; Sample Size :3,692;