



Face value: Unmasking Australian skincare shoppers in 2025

Exploring the skincare priorities of Australians in 2025, with a spotlight on those aged 18-29.



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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 look at how trends shift among the younger demographic – with a profile deep-dive on skincare enthusiasts aged 18-29.”

Laura Robbie

CEO - Asia-Pacific, YouGov

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Report takeaways



Future-facing trends: 36% of Australian skincare consumers would consider trying out Vitamin C infused products in the next 12 months, followed by clean beauty (31%), and hyaluronic acid infused products (28%).



Retail sway: “Good deals and discounts” is the top factor for consumers deciding which retailer to shop with. More than half of consumers select this as an important factor in their decision making.



Tuning into discovery channels: Instagram is the leading digital platform for discovering new skincare products for all skincare consumers (57%), followed by Facebook (51%) and YouTube (40%). TikTok performs significantly higher among those aged 18-29 (62%).



Vanity metrics: 44% of skincare consumers aged 18-29 purchase skincare products to improve their skin for beauty reasons, compared to 27% for all age groups



The influencer effect: 40% of skincare consumers aged 18-29 cite influencers on social media as how they find out about new skincare products, compared to 22% for all age groups.



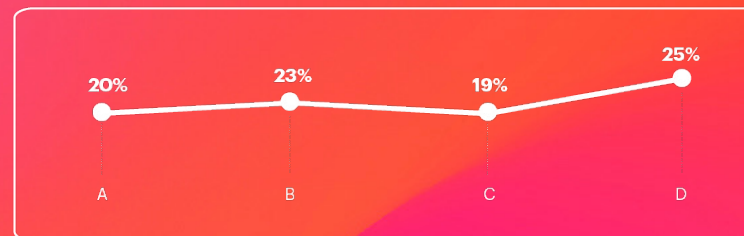
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Data results

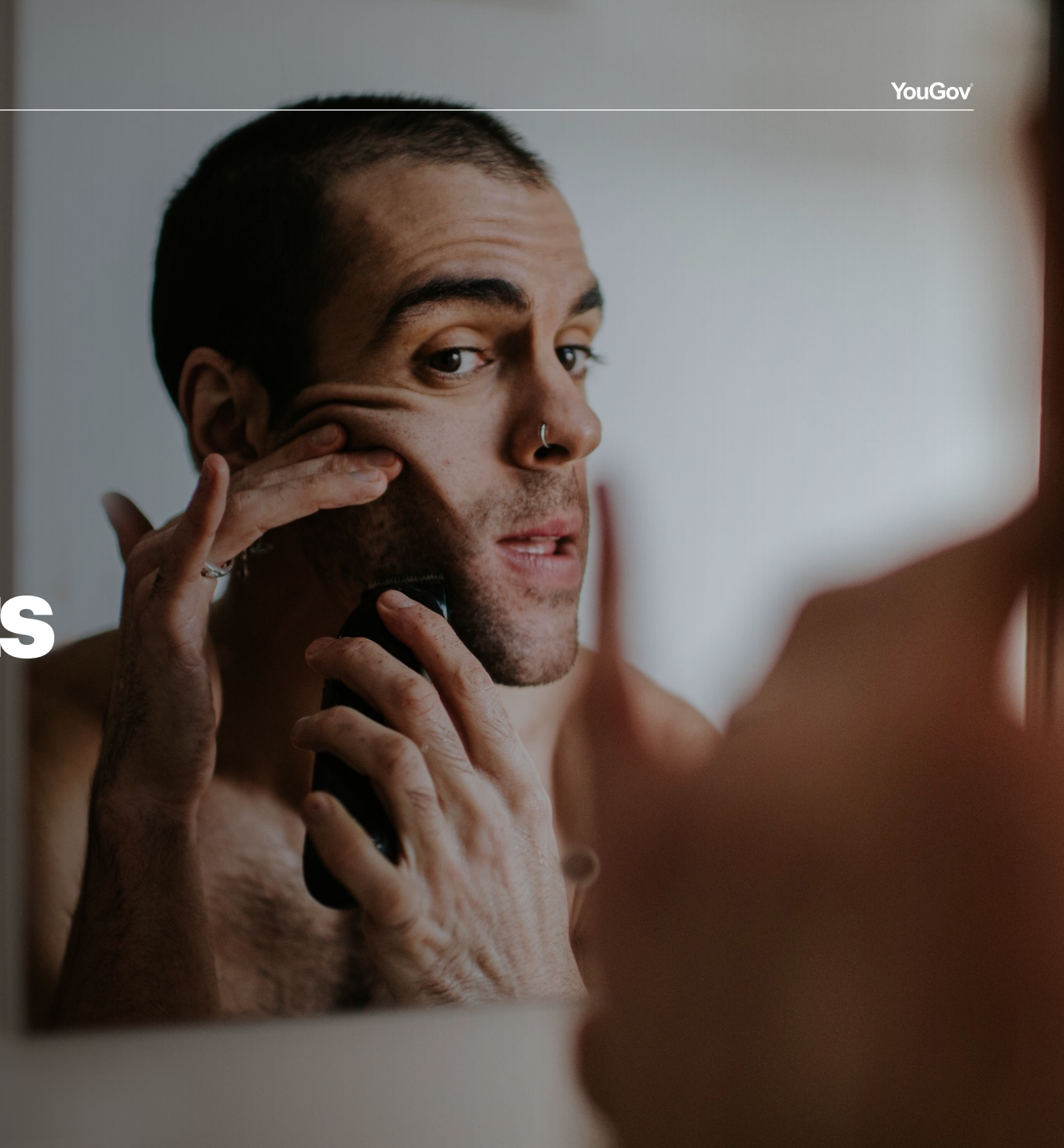


37%
(vs. Nat Rep)



The glow factor: Consumer insights

Exploring what matters to Australian skincare consumers as we head into 2025.

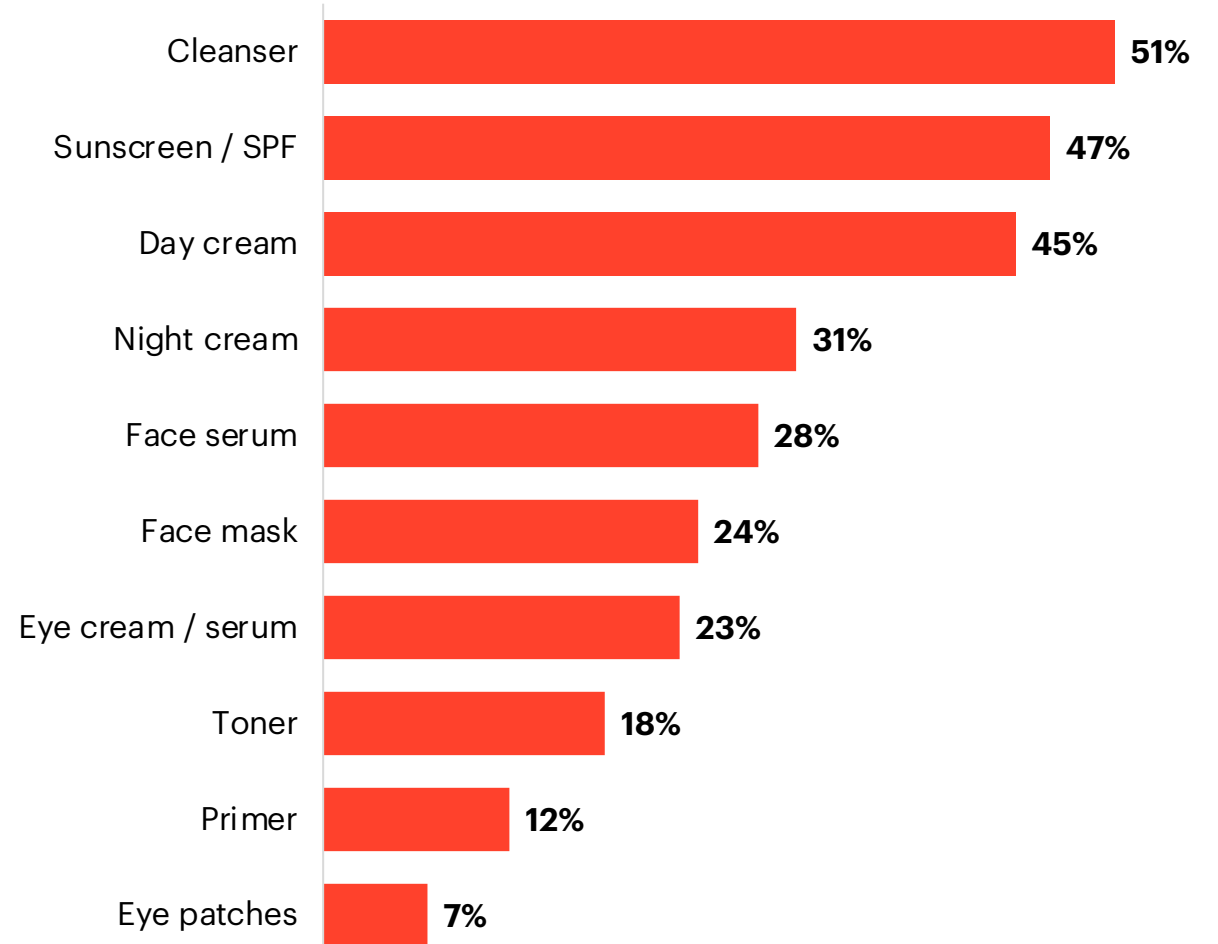


1 in 2 Australian skincare consumers used a cleanser in the last month

Cleansers were the most used skincare product in the last month (**51%**), followed by SPF (**47%**), day cream (**45%**), night cream (**31%**), and face serum (**28%**).

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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: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>800).

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

Skincare consumers aged 18-29 prioritize cleansers, SPF and face masks

Those aged 45+ are more likely to use day cream and night cream compared to younger skincare consumers.

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

Age: 18-29

Products used		% of respondents
1	Cleanser	59%
2	Sunscreen / SPF	52%
3	Face mask	38%
4	Day cream	34%
5	Face serum	32%

Age: 30-44

Products used		% of respondents
1	Cleanser	58%
2	Sunscreen / SPF	51%
3	Day cream	41%
4	Face serum	32%
5	Night cream	31%▲

Age: 45+

Products used		% of respondents
1	Day cream	52%▲
2	Cleanser	42%▼
3	Sunscreen / SPF	42%▼
4	Night cream	36%▲
5	Face serum	24%

YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n> 150). Don't know and None of these options not shown.
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.

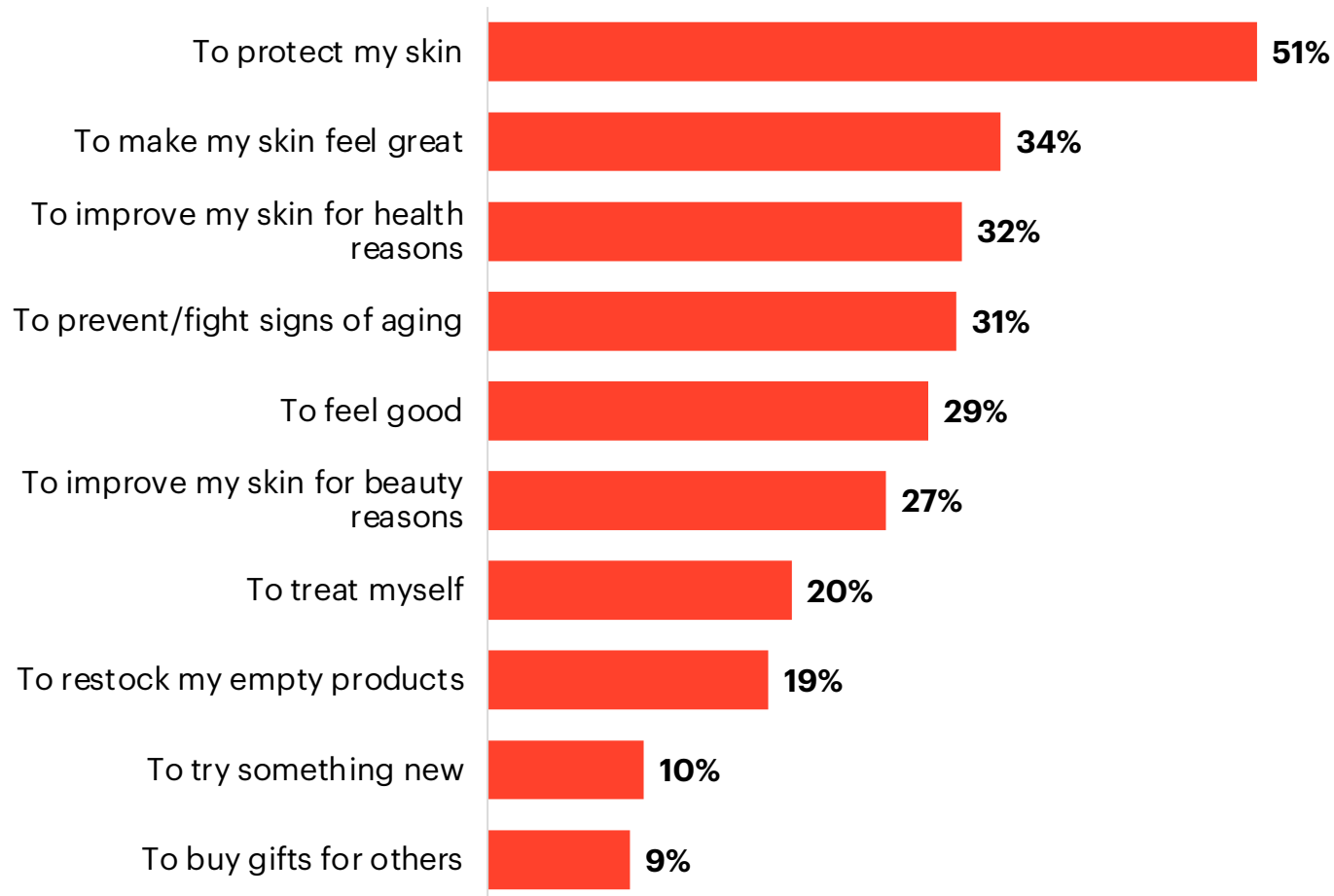
What matters to Australians in 2025?

51% of people in Australia state protecting their skin is a main reason for purchasing skincare products, followed by making their skin feel great (**34%**), and improving their skin for health reasons (**32%**).

18% of respondents 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, AU. (n> 1,000).

Skincare consumers aged 18-29 prioritize improving their skin for beauty reasons

44% of those aged 18-29 cite improving their skin for beauty reasons as a main reason for purchasing skincare, compared to 27% for all age groups.

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

Age: 18-29

Reasons to purchase		% of respondents
1	To protect my skin	59%
2	To make my skin feel great	45%
3	To improve my skin for beauty reasons	44%
4	To feel good	41%
5	To improve my skin for health reasons	39%

Age: 30-44

Reasons to purchase		% of respondents
1	To protect my skin	58%
2	To make my skin feel great	46%
3	To feel good	42%
4	To improve my skin for health reasons	41%
5	To improve my skin for beauty reasons	38%

Age: 45+

Reasons to purchase		% of respondents
1	To protect my skin	68%
2	To prevent/fight signs of aging	46%▲
3	To make my skin feel great	37%
4	To improve my skin for health reasons	36%
5	To feel good	29%▼

YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (Each age group: n> 150). *Don't know and None of these options not shown.

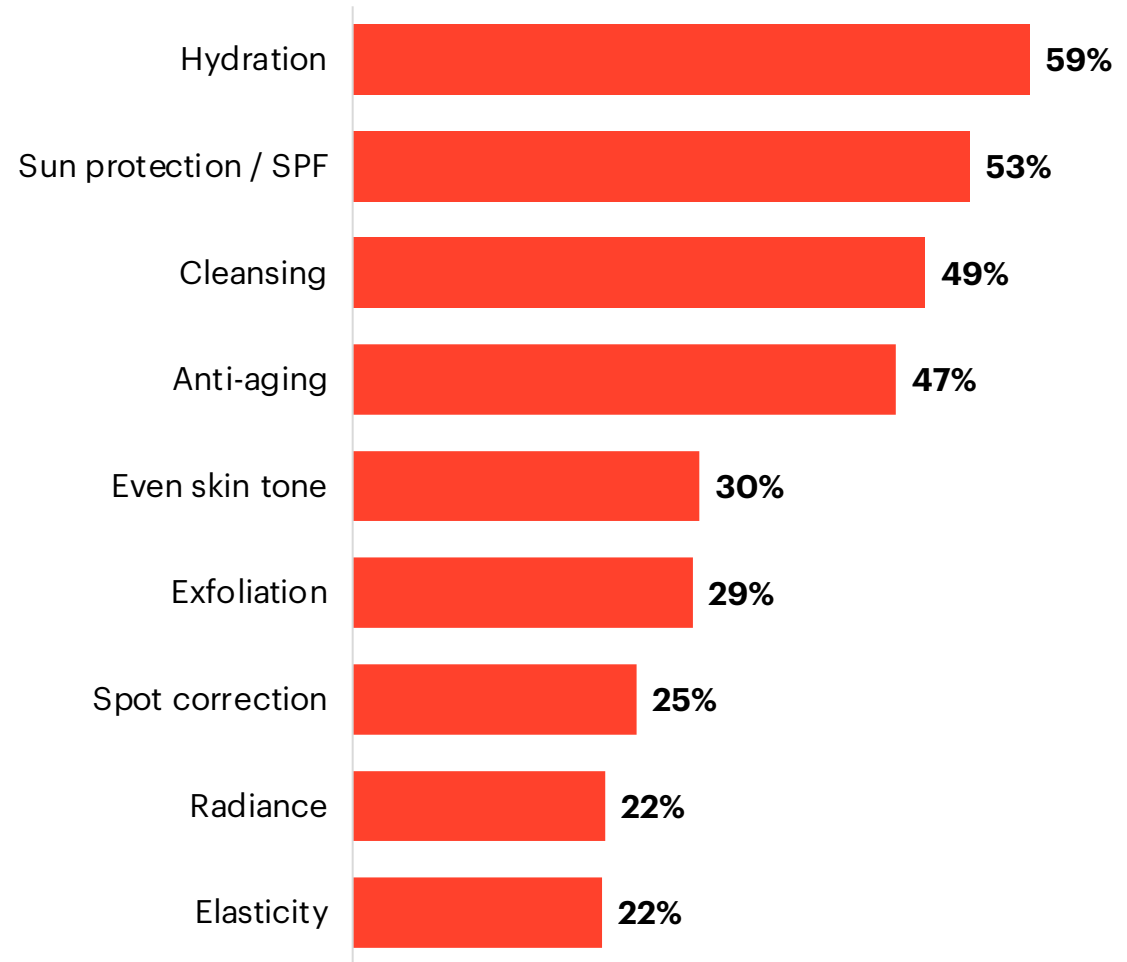
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.

Hydration is the main benefit that skincare consumers look for

Sun protection/SPF (**53%**) and cleansing (**49%**) complete the top 3.

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



YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>800).

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

Skincare consumers aged 18-29 look for cleansing, hydration, and SPF benefits

Those aged 30+ are significantly more likely to seek anti-aging benefits than younger consumers.

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

Age: 18-29

Benefits		% of respondents
1	Cleansing	56%
2	Hydration ▼	50%
3	Sun protection / SPF	46%
4	Exfoliation	38%
5	Even skin tone	36%

Age: 30-44

Benefits		% of respondents
1	Hydration	62% ▲
2	Sun protection / SPF	57% ▲
3	Cleansing	57%
4	Anti-aging	47% ▲
5	Even skin tone	33%

Age: 45+

Benefits		% of respondents
1	Hydration	60% ▲
2	Sun protection / SPF	54%
3	Anti-aging	54% ▲
4	Cleansing	41% ▼
5	Even skin tone	25% ▼

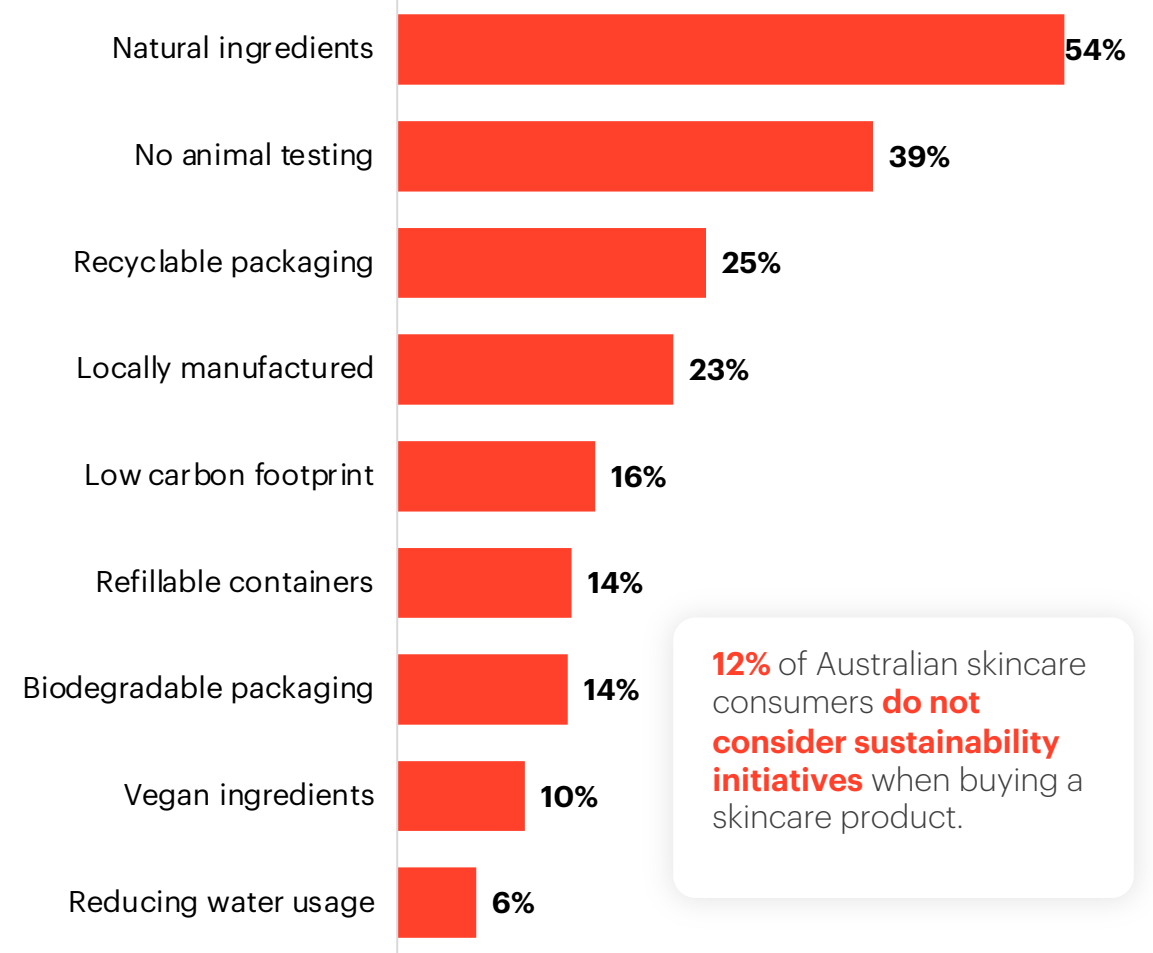
YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>150). *Don't know and None of these options not shown.
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.

Natural ingredients and no animal testing and are the top sustainability initiatives for Australian skincare consumers

Followed by recyclable packaging (25%), locally manufactured (23%), low carbon footprint (16%), and refillable containers (14%).

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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.



YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>800).

*Don't know and Other options not shown.

Sustainability matters: What skincare consumers aged 18-29 care about

23% of skincare consumers aged 18-29 say that a low carbon footprint is a top 3 sustainability initiative, compared to 16% for all age groups.

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

Age: 18-29

Sustainability Initiatives		% of respondents
1	Natural ingredients	57%
2	No animal testing	30%
3	Low carbon footprint	23%
4	Locally manufactured	22%
5	Recyclable packaging	22%
I do not consider any sustainability initiatives		8%

Age: 30-44

Sustainability Initiatives		% of respondents
1	Natural ingredients	53%
2	No animal testing	37%
3	Recyclable packaging	29%
4	Locally manufactured	23%
5	Biodegradable packaging	18%
I do not consider any sustainability initiatives		10%

Age: 45+

Sustainability Initiatives		% of respondents
1	Natural ingredients	54%
2	No animal testing	44%▲
3	Recyclable packaging	24%
4	Locally manufactured	22%
5	Low carbon footprint	12%
I do not consider any sustainability initiatives		16%▲

YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>150).
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.

What drives consideration of retailers among Australian skincare consumers?

More than half (55%) consider good deals and discounts an important factor when deciding which skincare retailer to shop with.

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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: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>800).
*Don't know, Other, and Not applicable options not shown.

Skincare consumers aged 18-29 prioritize good deals, known brands and finding the cheapest price when deciding which retailer to shop with

Those aged 45+ are significantly more likely to a conveniently located store as an important factor.

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

Age: 18-29

Retailer factors		% of respondents
1	Good deals and discounts	48%
2	Shopping with a known or trusted brand	42%
3	Finding the cheapest price	40%
4	Receiving free delivery	36%
5	Having a store located conveniently	30%

Age: 30-44

Retailer factors		% of respondents
1	Good deals and discounts	55%
2	Shopping with a known or trusted brand	45%
3	Finding the cheapest price	40%
4	Receiving fast delivery	36%▲
5	Receiving free delivery	35%

Age: 45+

Retailer factors		% of respondents
1	Good deals and discounts	58%
2	Shopping with a known or trusted brand	46%
3	Finding the cheapest price	44%
4	Having a store located conveniently	40%▲
5	Receiving free delivery	23%▼

YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>150)
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.

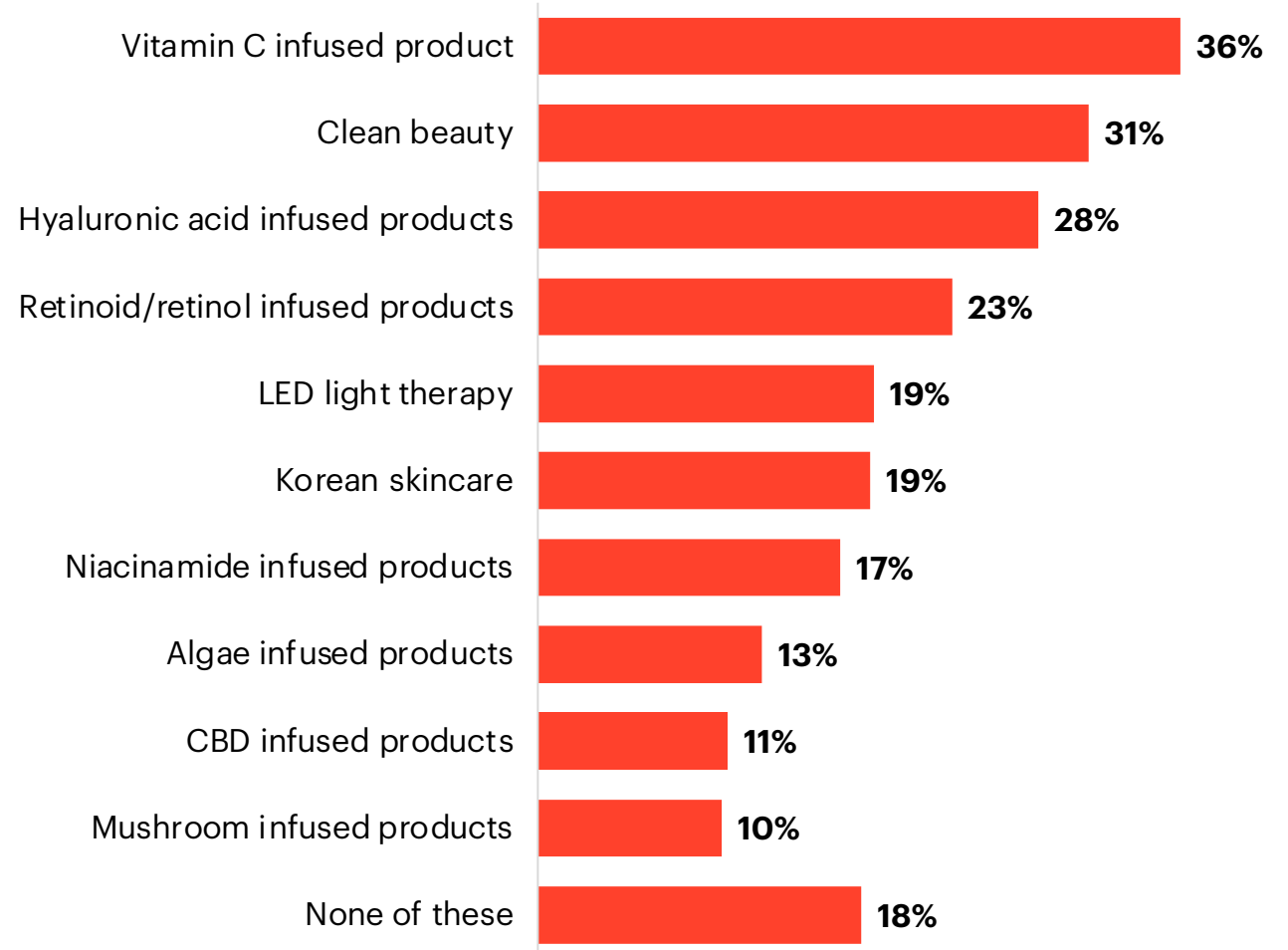
Future-facing skincare trends

Vitamin C infused products (**36%**), clean beauty (**31%**), and hyaluronic acid infused products (**28%**) are the top trends that Australian skincare consumers would consider trying in the next 12 months.

1 in 10 (**11%**) would consider CBD infused products in 2025.

Get in touch

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



YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>800).

*Don't know not shown.

What’s trending with Australian skincare consumers aged 18-29?

The top five trends among younger skincare consumers are Vitamin C infused products, clean beauty, hyaluronic acid infused products, Korean skincare and niacinamide infused products.

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

Age: 18-29

Skincare trends		% of respondents
1	Vitamin C infused product	43%
2	Clean beauty	31%
3	Hyaluronic acid infused products	30%
4	Korean skincare	28%
5	Niacinamide infused products	23%
None of these		10%

Age: 30-44

Skincare trends		% of respondents
1	Vitamin C infused product	45%
2	Clean beauty	36%
3	Hyaluronic acid infused products	32%
4	Korean skincare	29%
5	Retinoid/retinol infused products	26%
None of these		13%

Age: 45+

Skincare trends		% of respondents
1	Clean beauty	27%
2	Vitamin C infused product	27% ▼
3	Hyaluronic acid infused products	24%
4	Retinoid/retinol infused products	22%
5	LED light therapy	13% ▼
None of these		26% ▲

YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>150). *Other and Don't know options not shown.
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.

Skincare discovery drivers

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

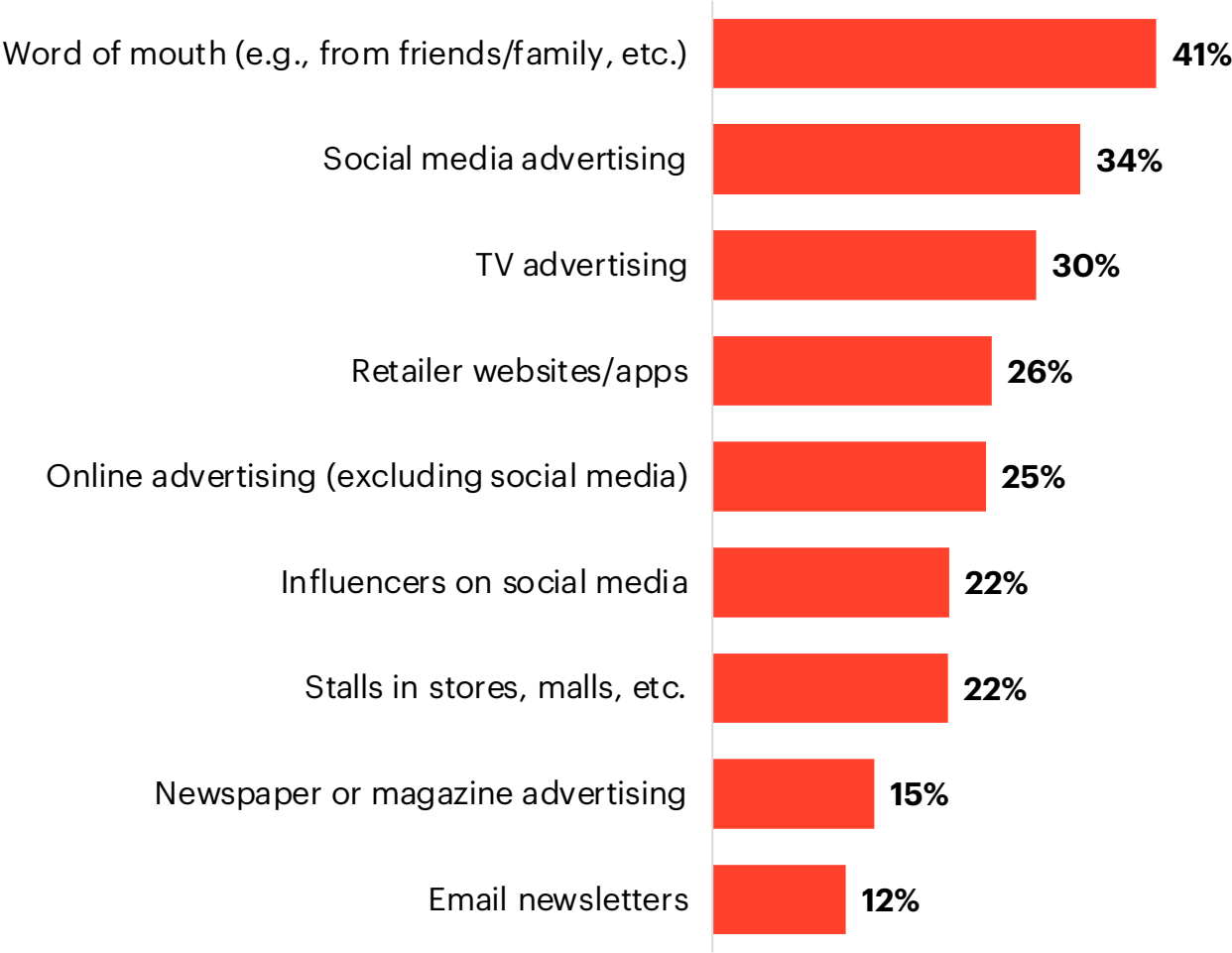


How skincare consumers discover new products

Word of mouth (**41%**), social media advertising (**34%**) and TV advertising (**30%**) are the top ways Australian skincare consumers find about new skincare products.

Get in touch

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



YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>800). *Don't know and None of these option not shown.

Social media advertising is the top discovery method for those aged 18-29

40% of skincare consumers aged 18-29 cite influencers on social media as how they find out about new skincare products, compared to 22% for all age groups.

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

Age: 18-29

Discovery method		% of respondents
1	Social media advertising	47%
2	Word of mouth	42%
3	Influencers on social media	40%▲
4	Online advertising (excluding social media)	36%
5	Stalls in stores, malls, etc.	29%

Age: 30-44

Discovery method		% of respondents
1	Social media advertising	43%
2	Word of mouth	41%
3	Online advertising (excluding social media)	31%
4	Influencers on social media	29%▼
5	TV advertising	29%

Age: 45+

Discovery method		% of respondents
1	Word of mouth	39%
2	TV advertising	31%
3	Retailer websites/apps	23%
4	Social media advertising	20%▼
5	Stalls in stores, malls, etc.	16%▼

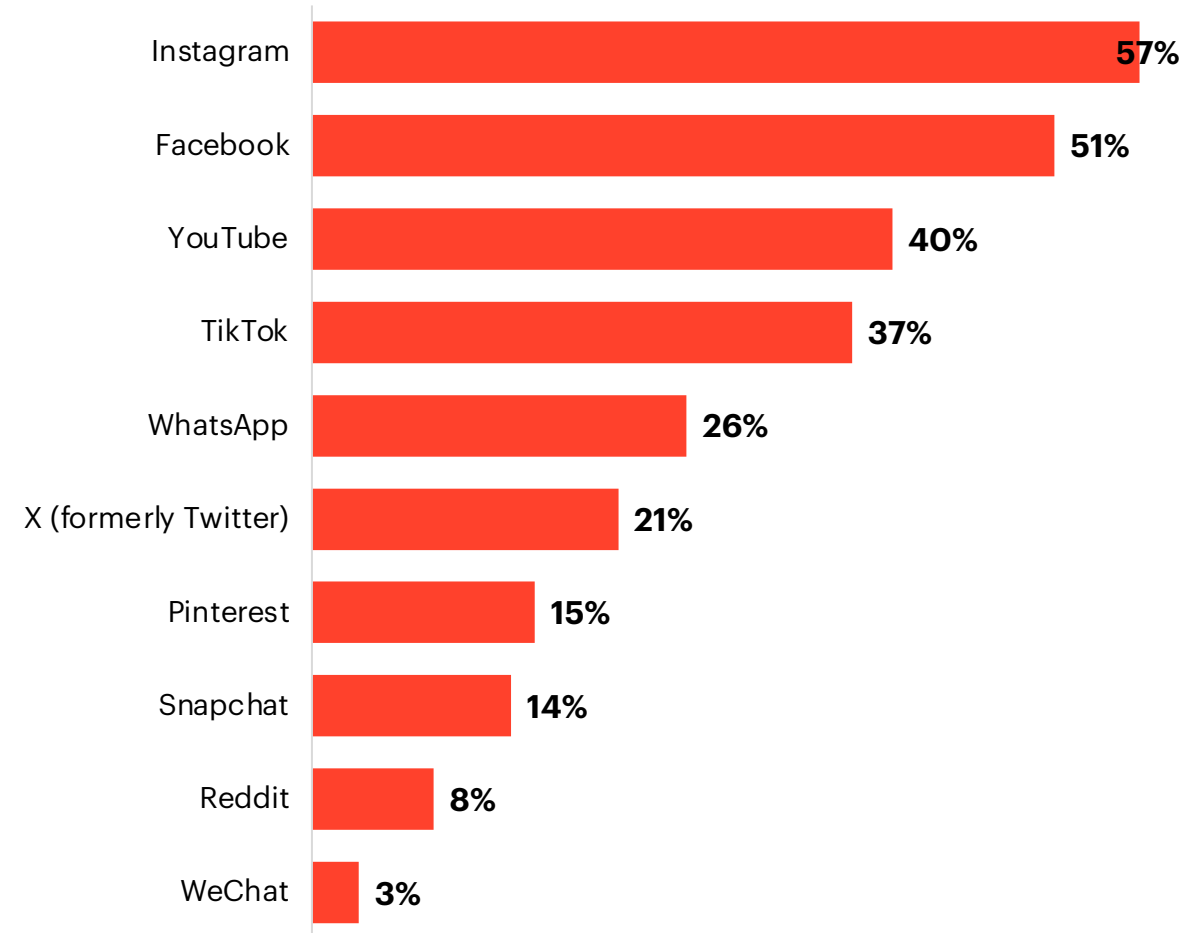
YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>150).
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.

Instagram is the leading digital platform for discovering new skincare products

57% of Australian skincare consumers usually discover new skincare products on Instagram, followed by Facebook (**51%**) and YouTube (**40%**).

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



YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>500). 'Don't Know and N/A not shown. 'N/A – I do not discover new skincare products on any of these platforms' is removed.

Instagram, TikTok and YouTube are the leading discovery channels for skincare consumers aged 18-29

62% of those aged 18-29 usually discover new products on TikTok, compared to 37% for all age groups.

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

Age: 18-29

	Platform	% of respondents
1	Instagram	67%
2	TikTok	62%▲
3	YouTube	45%
4	Facebook	44%
5	WhatsApp	36%

Age: 30-44

	Platform	% of respondents
1	Instagram	69%
2	Facebook	54%
3	YouTube	45%
4	TikTok	44%▼
5	WhatsApp	33%

Age: 45+

	Platform	% of respondents
1	Facebook	53%
2	Instagram	35%▼
3	YouTube	30%▼
4	TikTok	10%▼
5	Pinterest	9%▼

YouGov Surveys: 13th September - 1st October 2024, AU. Australians who purchase skincare products (n>100).
▲/▼: Indicates statistically significant difference of that age group compared to the 18-29 age group.
Don't Know and N/A not shown. 'N/A – I do not discover new skincare products on any of these platforms' is removed.

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 in Australia

Explore more data



Rank	Brand	% considering
1	Dove	35.6%
2	Nivea	33.0%
3	Cancer Council Sunscreen	22.4%
4	L’Oreal	19.9%
5	QV	18.3%
6	Olay	15.5%
7	Sukin	14.4%
8	Neutrogena	14.1%
9	Garnier	14.0%
10	CeraVe	12.3%

YouGov BrandIndex: December 1, 2023 – November 30, 2024, AU, nat rep (n>11,300).
Question: When you are in the market next to purchase personal care products, from which of the following brands would you consider purchasing?

Increasingly considered skincare and cosmetics brands

Explore more data



Rank	Brand	% considering 2024	% considering 2023	Change in consideration
1	Nivea	33.0%	15.4%	+17.6
2	L’Oreal	19.9%	9.3%	+10.6
3	Neutrogena	14.1%	4.5%	+9.6
4	Olay	15.5%	7.4%	+8.1
5	Clinique	9.4%	3.5%	+5.9
6	CeraVe	12.3%	9.5%	+2.8
7	La Roche-Posay	9.8%	8.3%	+1.5
8	Garnier	14.0%	13.5%	+0.5
9	Bioderma	4.0%	3.5%	+0.5
10	Avène	6.3%	6.1%	+0.2

YouGov BrandIndex: December 1, 2023 – November 30, 2024, AU, nat rep (n>6,800).
Question: When you are in the market next to purchase personal care products, from which of the following brands would you consider purchasing? **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	Rank	Brand	% considering
1	Dove	32.6%	1	Dove	38.5%
2	Nivea	31.6%	2	Nivea	34.4%
3	Cancer Council Sunscreen	19.4%	3	L'Oreal	25.8%
4	L'Oreal	13.8%	4	Cancer Council Sunscreen	25.3%
5	QV	13.0%	5	QV	23.3%
6	Banana Boat	11.6%	6	Olay	22.1%
7	Johnson's Baby	11.0%	7	Sukin	20.7%
8	Garnier	10.2%	8	Neutrogena	18.3%
9	Neutrogena	9.7%	9	Garnier	17.7%
10	Olay	8.6%	10	CeraVe	17.4%

YouGov BrandIndex: December 1, 2023 – November 30, 2024, AU, nat rep (n>5,500)
Question: When you are in the market next to purchase personal care products, from which of the following brands would you consider purchasing?

Top skincare and cosmetic brands by age group

Age: 18-29

Rank	Brand	% considering
1	Dove	34.3%
2	Nivea	31.6%
3	CeraVe	22.7%
4	Cancer Council Sunscreen	19.8%
5	L’Oreal	17.2%
6	La Roche-Posay	16.3%
7	Cetaphil	15.2%
8	QV	15.2%
9	Sukin	13.1%
10	Olay	12.8%

Age: 30-44

Rank	Brand	% considering
1	Nivea	35.2%
2	Dove	34.6%
3	L’Oreal	21.7%
4	Cancer Council Sunscreen	17.9%
5	Neutrogena	17.8%
6	QV	17.4%
7	CeraVe	16.3%
8	Garnier	15.6%
9	Sukin	14.7%
10	Olay	14.4%

Age: 45+

Rank	Brand	% considering
1	Dove	36.6%
2	Nivea	32.3%
3	Cancer Council Sunscreen	25.8%
4	QV	19.8%
5	L’Oreal	19.8%
6	Olay	17.1%
7	Sukin	14.6%
8	Garnier	14.1%
9	Neutrogena	13%
10	Aveeno	11%

Build a real-world picture of your brand

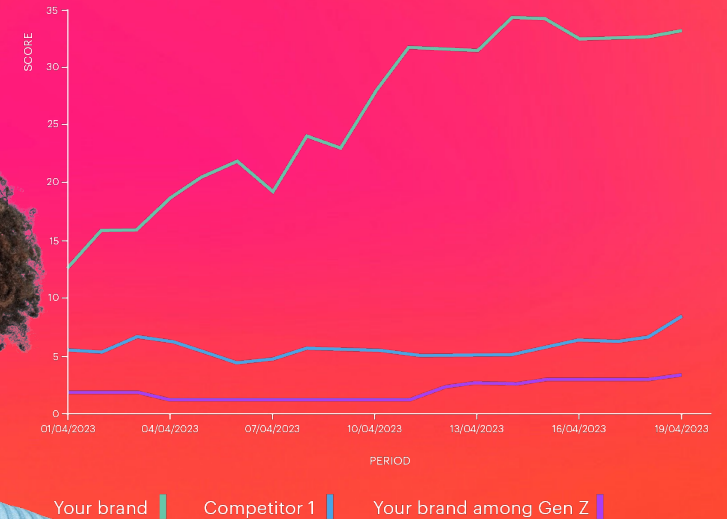
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Explore brand tracking



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 1,002 respondents in Australia.

The target group of “skincare consumers” is determined by those who answered the question: “In general, what are the main reasons you purchase skincare products?” and 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.

Consideration scores are based on respondents’ answers to the following question: “When you are in the market next to purchase personal care products, from which of the following brands would you consider purchasing?”

Consideration 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. A minimum base size of 300 (n) is required.



Thank you

/Research Reality

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