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CURION INTELLIGENCE REPORTS

2025

UNDERSTANDING THE MOISTURIZING JOURNEY: KEY DIFFERENCES BETWEEN MEN & WOMEN

JOURNEY TO GLOW







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OVERVIEW

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Background

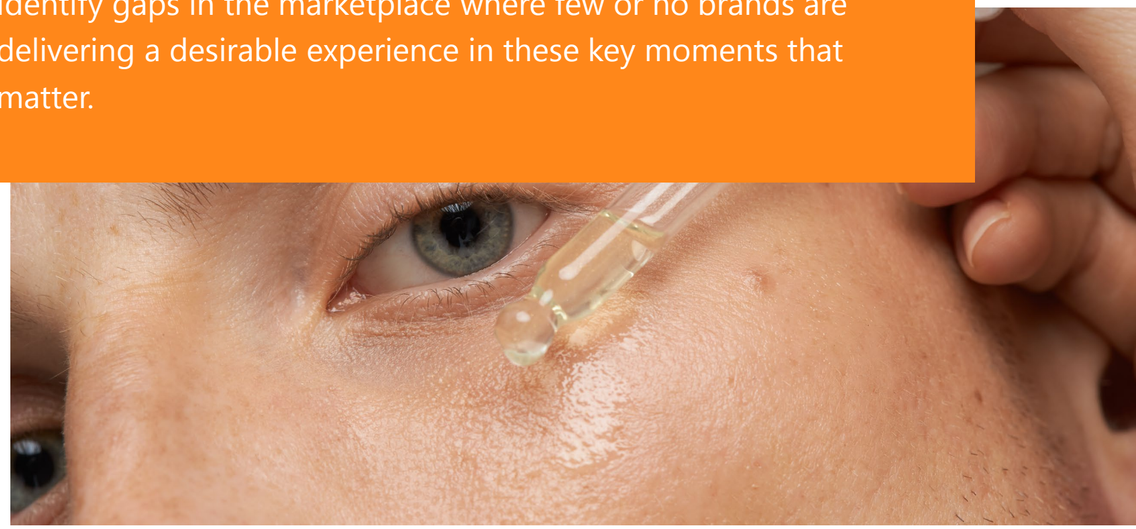
CONSUMER JOURNEY

The $446B* global skincare industry continues to grow at an accelerated rate (+10% since 2022[1]), and it's expected to grow by 6% annually through 2028. Men's skincare represents one of the fastest-growing segments with a 68% increase in facial skincare use from 2022 to 2024.

Product innovation and brand strategy must be grounded in foundational insights that anchor on the core moments that matter to consumers to differentiate and drive loyalty in this competitive market. This primary research will focus on the consumer journey for facial moisturization products.
We define moments that matter as *moments that are functionally critical and/or emotionally poignant to the experience.*

This research inspires clients to move beyond functional advantages in key moments to an experience that creates a deeper connection, enhances appeal, and drives loyalty.





Objectives

01 Explore the entire consumer journey from research to product experience for moisturizing skincare products.

02 Identify the moments that matter most in this journey and determine how brands can deliver in these moments.

03 Identify key points of difference between women and men throughout the experience.

04 Identify barriers to product discovery and purchase, in-store and online.

05 Identify gaps in the marketplace where few or no brands are delivering a desirable experience in these key moments that matter.

[1] Source: McKinsey & Company – Euromonitor
* Products may include moisturizers, creams, balms or serums.

Methodology

PHASE 01

DIGITAL SELFNOGRAPHY

Asynchronous ethnographic activities completed at-home and in stores that:

- Explored the skincare journey from discovery to usage experience, diving into both functionally and emotionally critical moments to inform the quantitative phase and the final journey map.

Our AI-enabled platform allowed for deep analysis of both men and women and the emotional states of each key moment.

RESPONDENT SPECIFICATIONS

- U.S. consumers, aged 18-65
- N=15 women, N=10 men
- Current user (past month) of facial moisturizing products (creams, lotions, gels, serums); primary purchaser for self
- Mix of skin types, race/ethnicities, HHI, and regional locations

PHASE 02

ONLINE SURVEY

300 U.S. consumers (183 female, 117 male) participated in a 15-minute questionnaire to:

- Validate and size qualitative insights, including pre-purchase triggers and influences, purchasing habits, delighters and pain points, and product usage
- Assess how the category is delivering on the needs associated with each moment that matters and uncover gaps in the market through Needs & Gaps analysis

RESPONDENT SPECIFICATIONS

- U.S. consumers aged 18-65
- Past month use of facial moisturizers (creams, lotions, gels, serums, sunscreens)
- Purchase at least one brand from a pre-determined list
- Survey click-ins were balanced to census on household income, region, and age, but allowed for natural fallout in sample



Journey to Glow

> **"I just want to maintain the youthfulness of my skin and feel confident!**
> Eric, 45, male



DISCOVERY

Triggers & Influencers

JOURNEY BEGINNINGS

Prevention of adverse outcomes like aging, acne and oily skin, and active dry skin discomfort triggers first engagement.

Moment that Matters
"I see or feel a change in my skin and realized it's time to take care of it."

EXPLORATION

Browsing in a store or online, word of mouth, and social media are the top discovery vehicles.

Brand awareness and experimental behaviors vary by gender.

Moment that Matters
"If the product makes their skin feel healthy and youthful, maybe it can work for me too."



CONSIDERATION

Explore evaluation & selection criteria

THE SEARCH

The experience of evaluating moisturizer options is filled with hope, excitement, curiosity, and skepticism. Some feel overwhelmed by brands touting unique benefits and ingredients with which they are unfamiliar.

Previous experience with a brand or product, personal recommendations, and relevant benefit communication are the most compelling selection factors.

Moment that Matters
"I want to do something good for my skin — but with so many products, routines, and promises, the choice feels both exciting and paralyzing."

ROUTINES

Routines play a pivotal role in the evaluation process, with some looking for simplicity in routines and others prioritizing specialized products to fit with their existing system for AM/PM.

Moment that Matters
"My routine is more than just skincare- it's a daily act of self-respect and self-care so that I can be my best self."



PURCHASE

Examine buying behavior

RETAIL

Consumers typically repurchase moisturizers every 1–3 months, and about 28% of the time, they choose a product that is new to them. Most spend between $11 and $25 per purchase.

Consumers are most likely to purchase in a physical store in mass, beauty specialty, or drug stores; however, research on new products occurs online, where consumers feel less self-conscious exploring their options.

SELECTION DRIVERS

Brand familiarity, differentiated product claims/ attributes, and packaging work together to create the most compelling proposition that ultimately drives selection.

Moment that Matters
"Whether it's testing in-store or browsing reviews at home, I feel confident in my choice when I feel seen, supported, and informed."



PRODUCT EXPERIENCE

Identify brand satisfaction attributes that drives loyalty

PRODUCT EXPERIENCE GAPS

Most of the product gaps are focused on results & feel on skin.

The largest product experience gap where current products are under-delivering is leaving skin soft & smooth, while also not feeling sticky after application.

The biggest results gap is a moisturizer that relieves dry skin. This is followed closely by "replenishes skin moisture" and "provides long-lasting moisture."

Brands might be delivering moisturizers that make skin feel hydrated at first but does not provide real benefits/lasting hydration to meet their skin health desires.

Moment that Matters
"It's the quiet confidence that comes from visible change — not just in my skin, but in my mood."

Click to hear what they are trying to achieve for their skin.



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KEY THEMES	OPPORTUNITIES FOR BRANDS
Motivations Differ by Gender	
Women are proactive and look to *prevent* issues like aging or breakouts; men are often reactive and respond to *discomfort* like dryness or irritation.	Meet people where their skincare journey begins, whether driven by prevention, correction, or relief.
Broader Needs = Bigger Gaps for Women	
Women expect more from skincare: *hydration*, *softness*, *anti-aging*, and *glow*, but feel many products underdeliver.	Deliver multifunctional, high-performance products that meet women's elevated skincare expectations.
Retail Isn't One-Size-Fits-All	
Men often avoid in-store experiences and prefer *low-pressure discovery* online or through trusted sources. Women are *comfortable exploring in-store* and seek *product education*, *personalized guidance*, and *samples to try before they buy.*	Design engaging in-store experiences that support personal discovery and provide low-pressure, informative guidance.
Suitability With Routine is Key to Adoption	
Women often *embrace multi-step regimens* as self-care; men want *simple, time-efficient solutions* that work.	Build a more ritualistic experience to help drive loyalty with men.
Men Represent a High-Value Growth Opportunity	
Men engage when *discomfort* is high but often *lack confidence navigating skincare*. Clear, *results-driven solutions*, especially those that are *simple and deliver fast-acting relief*, can unlock loyalty.	Close the confidence gap for men through low-effort, high-trust products that quickly deliver visible results.
Redefining Skincare to Prioritize Skin Health, Not Just Appearance	
Consumers increasingly prioritize health-driven outcomes in their skincare routines, seeking products beyond aesthetics to support *skin health*, *barrier repair*, and *general well-being*.	Embed skin health within the wellness mindset, elevating it as a core part of everyday self-care, not just cosmetic upkeep.

THE DETAILS

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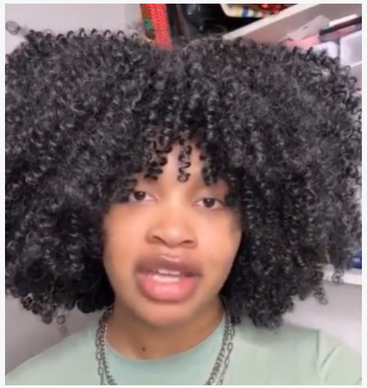






Discovery

Women seek radiant, youthful skin, while men desire healthy, comfortable and clear skin.



WOMEN

ctrl+click icon
to view video



Women are proactively seeking healthy, glowing, youthful looking skin.



MEN

ctrl+click icon
to view video

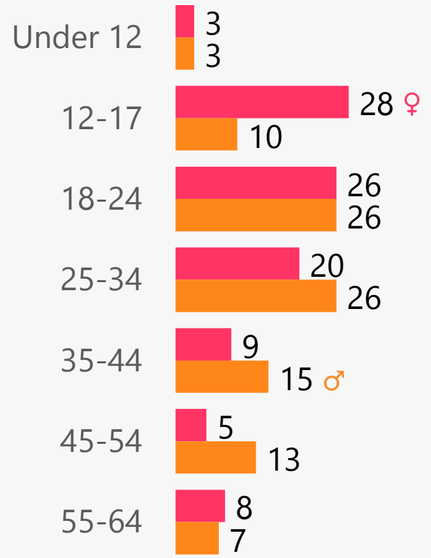


Men are looking for healthy, comfortable skin that lacks oil, blemishes and irritation.

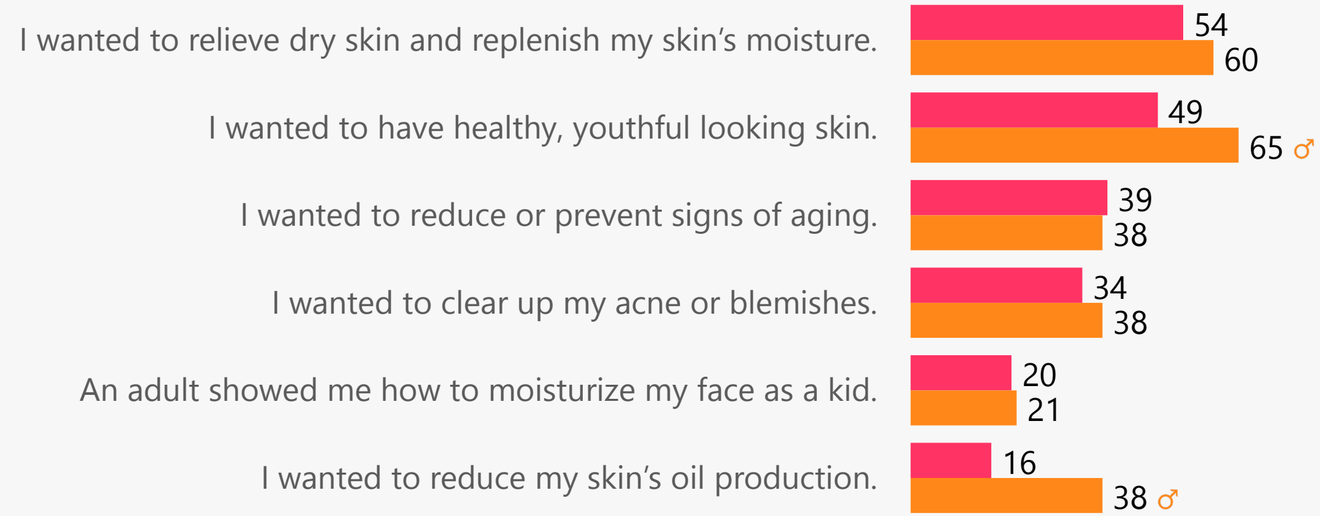
Female Male

Women generally start a skincare journey as a preventative measure, while men are triggered by an active issue like discomfort from dry skin.

Age Skincare Routines Begin (%)



First Reason for Facial Moisturizer Use (%)



Moment that Matters
"I see or feel a change in my skin — and realize it's time to take care of it."

QUALITATIVE

Men often begin moisturizing **reactively**, triggered by discomfort like dryness or irritation, often caused by shaving.

"I was about 25 years old, and my skin was cracking and peeling and dry." - Joshua, 35, male

Women, on the other hand, tend to start moisturizing as a **preventative** measure, earlier in life. They are driven by concerns about aging, blemishes, or overall skin health. Milestone birthdays are often a trigger.

"I turned 30... I really am trying to focus on my skin and preventing the effects of aging." - Christina, 31, female

Q200. At what age did you start a regular skincare routine?
Q205. When I first started using a facial moisturizer, it was because...
Base: Total Sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Women are more exploratory and brand-aware; men stick to fewer, familiar names.

Top Brands Aware Of (%)

	Total	Women	Men
Aveeno	88	90	86
CeraVe	83	84	80
Dove	83	85	79
Neutrogena	78	84 ♀	69
Vaseline	76	77	75
L'Oreal Paris	73	78 ♀	67
Olay	73	80 ♀	62
Clinique	70	83 ♀	51
Old Spice	69	65	75
Nivea	69	69	68
Maybelline	68	78 ♀	53
Estee Lauder	62	70 ♀	50
Lancome	57	69 ♀	38
Clean & Clear	56	68 ♀	38
Axe	56	49	68 ♂

Only top 15 brands shown, click here to see full list.

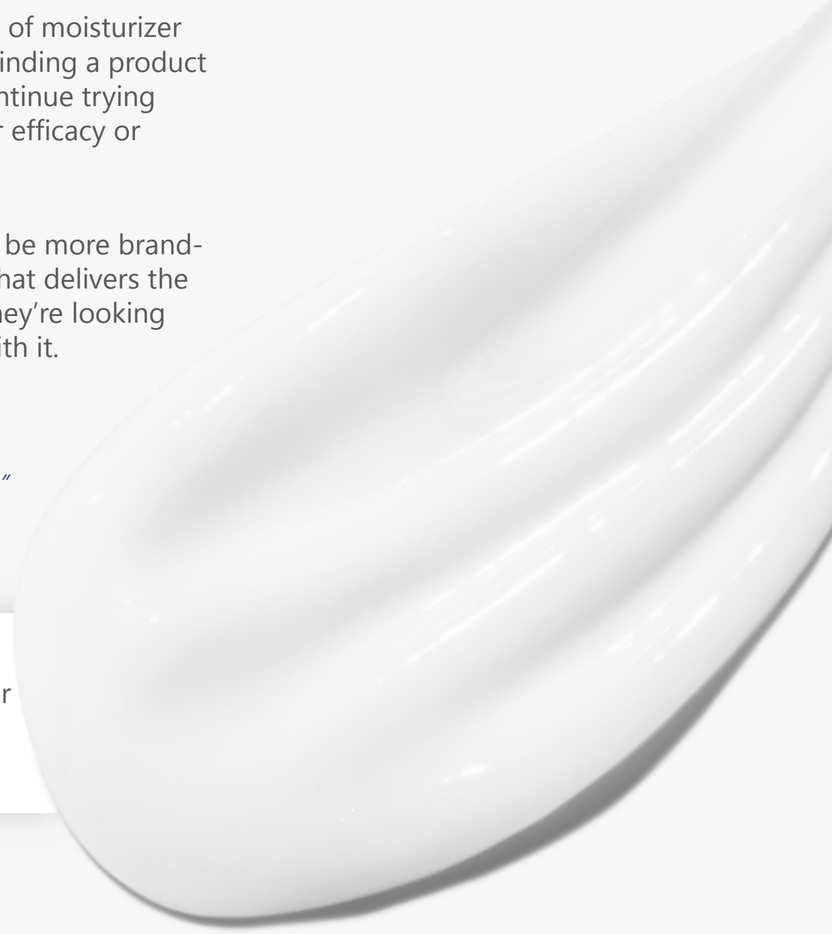
QUALITATIVE

Women explore a broader range of moisturizer and skincare brands. Even after finding a product that meets their needs, many continue trying new options in pursuit of greater efficacy or improvement.

Men, on the other hand, tend to be more brand-loyal. Once they find a product that delivers the moisturization and experience they're looking for, they're more likely to stick with it.

This continues to do what it did the first time I used it. The consistency in the results is why I continue to use it."
-JiJo, 31, male

GENDER DIFFERENCES
Prestige brands like Estée Lauder and Lancôme show the **widest** gender gaps in awareness.



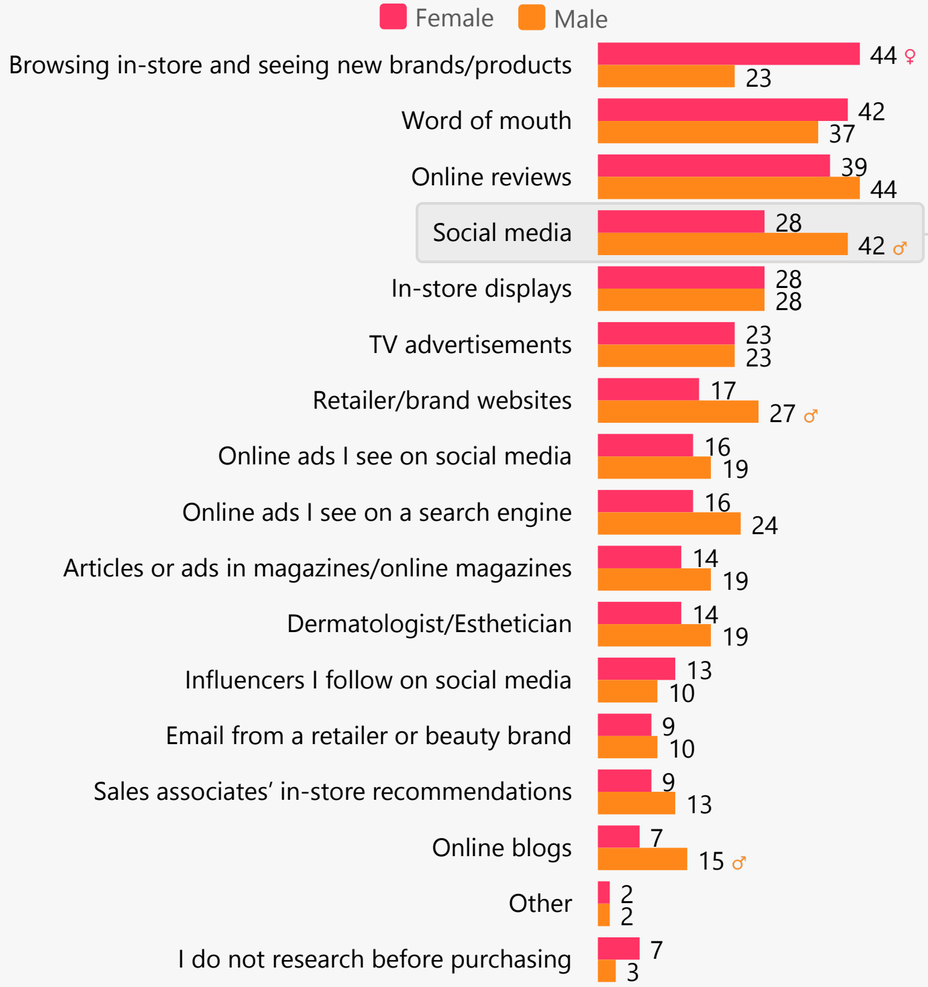
Q139. Which, if any, of these brands are you aware of?
Base: Total Sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Moisturizer discovery varies by gender: Women prefer in-store browsing, while men rely on online research.

Facial Moisturizer Research Channels (%)



Social Media Sources for Moisturizers (%)

Base: Those Who Research on Social Media

	Women n=52	Men n=49
Instagram	60	73
YouTube	60	73
TikTok	52	61
Facebook	46	51
Pinterest	29	16
Snapchat	19	16
Reddit	15	35♂
Twitter (X)	15	31

GENERATIONAL DIFFERENCES

Nearly **twice as many Gen Z and Millennials** use social media to learn about facial moisturizers compared to Gen X and Boomers (42% vs. 22%) — highlighting a clear generational shift toward digital-first discovery.

Q220. Where do you typically learn about facial moisturizers before purchasing?
Base: Total Sample (female n=183; male n=117)
Q221. You mentioned that you learn about facial moisturizers from social media. Which social media platforms do you typically use for this?

QUALITATIVE

For women, browsing in-store at drugstores or beauty retailers like Sephora and Ulta is engaging, inspiring, and approachable. Testers and samples help to build confidence in purchase decisions, especially for higher-end brands.

Men are more likely to discover products on social media like Instagram, YouTube, Tik Tok and Reddit. They're less comfortable in beauty retail spaces and rely more on peer reviews and digital content for guidance.

Both men and women are highly influenced by word of mouth, almost always other women in their lives.

WATCH OUT!

Locked displays at drugstores can make it difficult to explore new products—limiting access and discouraging in-store discovery.

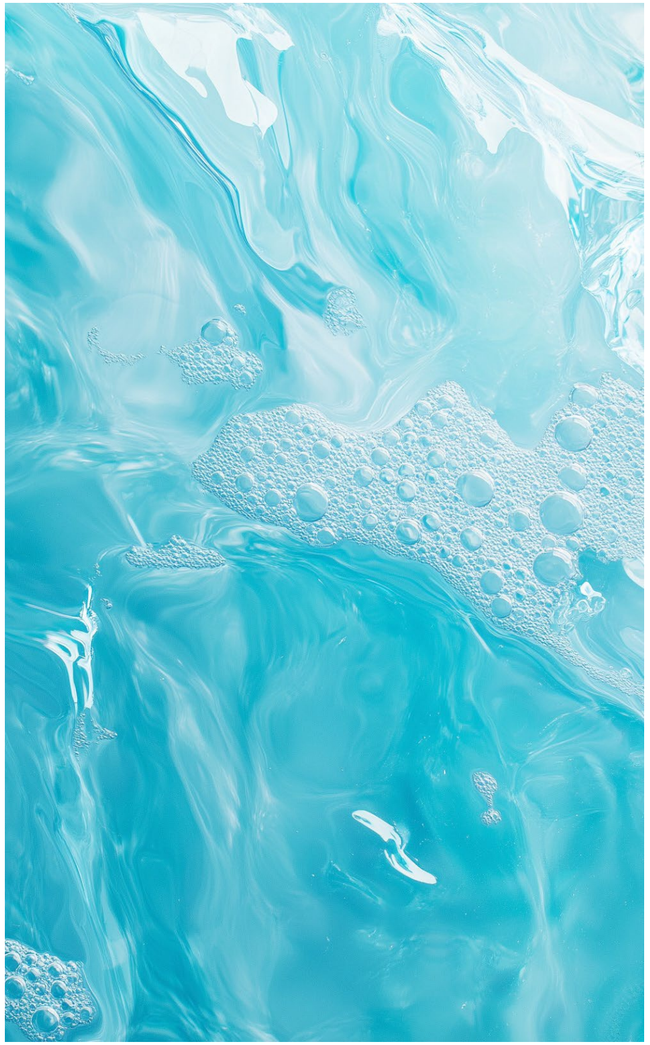
"[Dermalogica] was recommended by my wife whose friend told her about it. That friend had a good experience with the brand." - Eric, 45, male

"I saw it at the pharmacy and had heard about it from some friends." - Stephanie, 40, female

Moment that Matters

"If the product makes their skin feel healthy and youthful, maybe it can work for me too."

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.









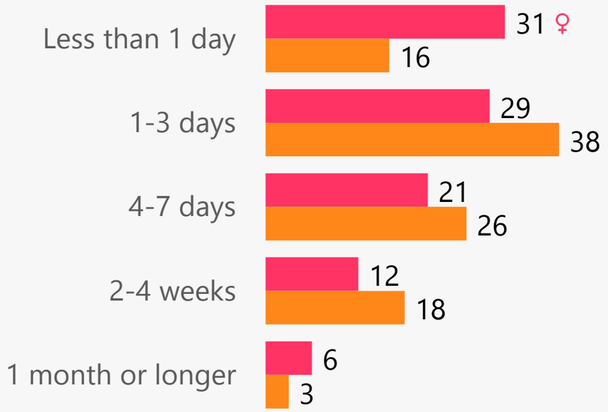
Consideration

Female Male

Women have a greater understanding and make quick in-store decisions but feel more overwhelmed by the need to choose wisely. At the same time, men take longer browsing with a curious, information-gathering mindset.

Research Duration (%)

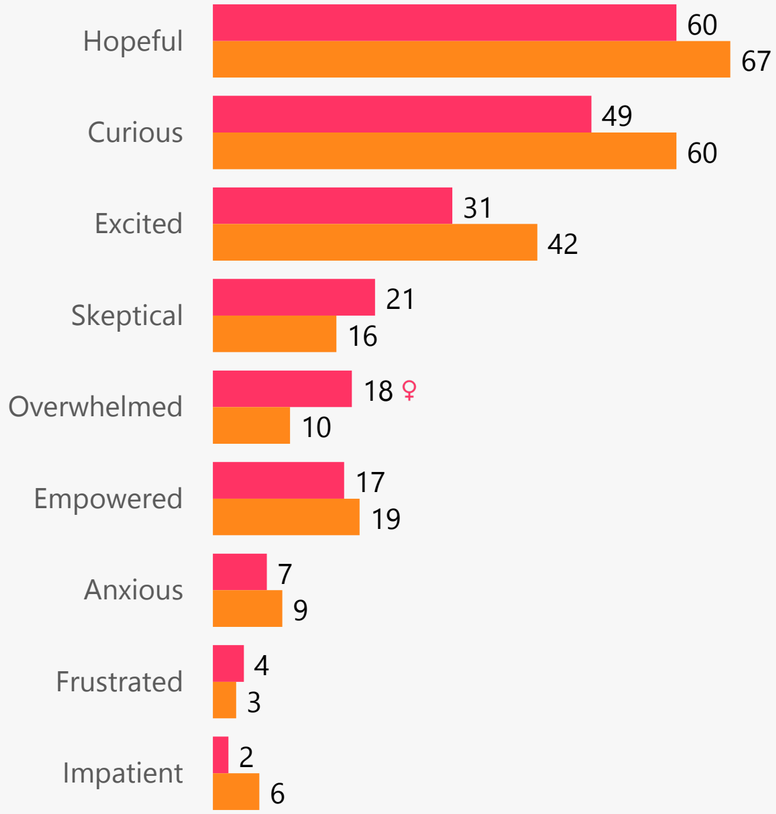
Base: Researches moisturizer before purchasing (female n=171; male n=114)



Moment that Matters
"I want to do something good for my skin — but with so many products, routines, and promises, the choice feels both exciting and paralyzing."

Research Emotions (%)

Base: Researches moisturizer before purchasing (female n=171; male n=114)



QUALITATIVE

Men typically have a larger skincare knowledge gap, sometimes causing them to feel insecure. They tend to educate themselves **during** the shopping process.

Women often come in with greater knowledge and can make quicker decisions, especially when repurchasing a brand, they know, but they can feel **overwhelmed** with pressure to choose the best option.

*"It felt **relaxing and empowering** to find something for me to help ME." - Lawrence, 29, male*

*"I feel excited, but a little **overwhelmed** by the process." - Taylor, 33, female*

*"Sometimes I feel **lost**, but **excited** too." - Mike, 31, male*

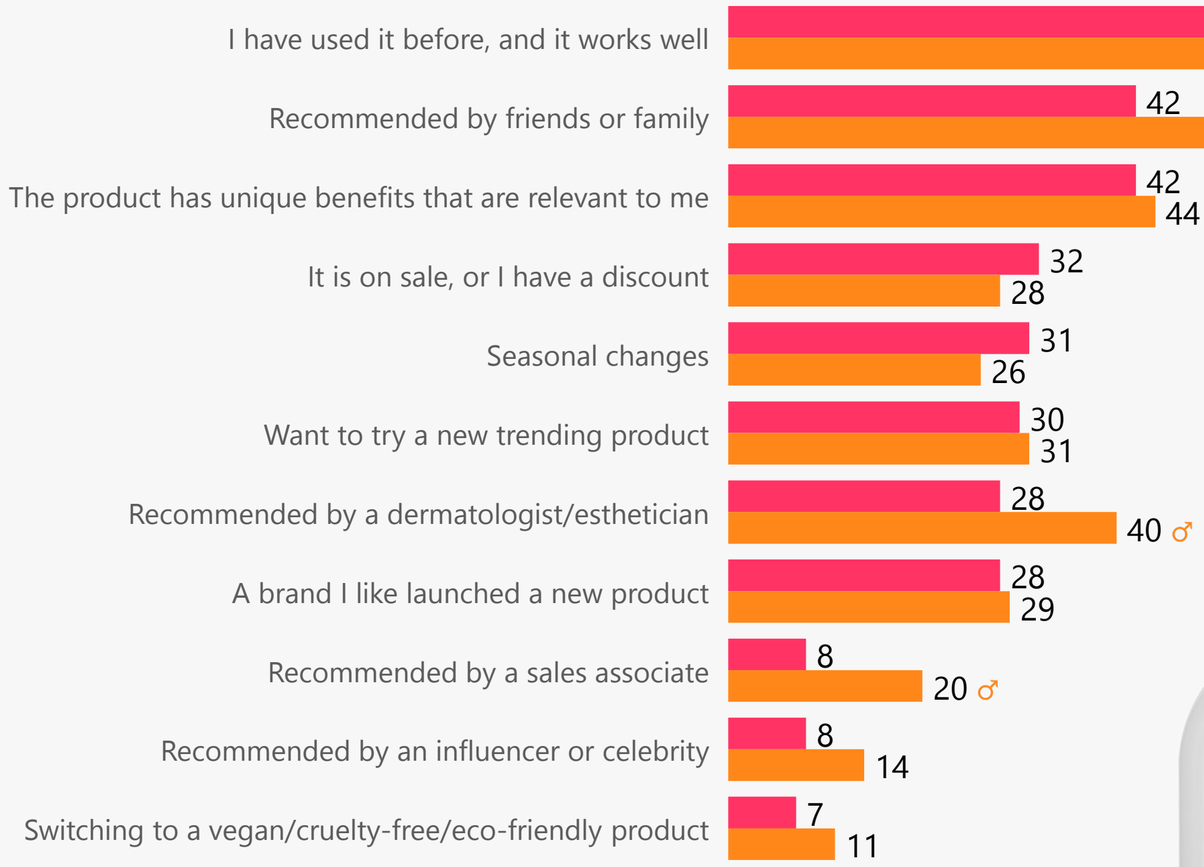
Q222. How long do you usually research a facial moisturizer before purchasing?
Q223. How do you typically feel when researching facial moisturizers to purchase?

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Women prioritize routine compatibility and product reliability, while men are more likely to be influenced by expert endorsements.

Purchase Triggers (%)





QUALITATIVE

Consumers often purchase facial moisturizers they've experienced before, because it's a safe and easy choice.

Women may hesitate to try new facial moisturizers due to potential disruptions to their skincare routine and makeup performance. However, they are willing to take the risk if there is a possibility of finding a better product.

"I wanted to find something that would provide better hydration and included SPF." - Taylor, 33, female

"I would only change my products if I were to run out of the one, I am already using [Lubriderm]. That's it!" - Anthony, 33, male

"I went to the dermatologist because I didn't know how to help my face. He provided a recommendation [Dermatological]." - Ark, 35, male

Q224. What are some reasons you might choose to purchase a facial moisturizer?
Base: Total sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Brands that consumers trust, ingredient transparency and clear communication about benefits drive decision making.

SHOPPING EXPERIENCE

ctrl+click icon to view video

Attribute Importance (T2B) (%)



QUALITATIVE

	Why is it important?	Brand Examples
Ingredient Details	Consumers are increasingly seeking ingredient transparency and clean, familiar ingredient lists. For some claims, like anti-aging or deep moisture, consumers look for hero ingredients with known benefits.	CeraVe, Paula's Choice, Neutrogena Hydro Boost
Packaging Explains Benefits	Clearly communicating on front-of-pack what the product will do for their skin in clear and easy-to-understand language helps set expectations.	OLAY: Visibly reduces lines & wrinkles in 28 days Neutrogena Hydro Boost: Known actives like Hyaluronic Acid and Retinol NIVEA: Deep Moisture w/ vitamin B

Q300. How important are the following when deciding what facial moisturizer to purchase?
Base: Total sample (female n=183; male n=117)

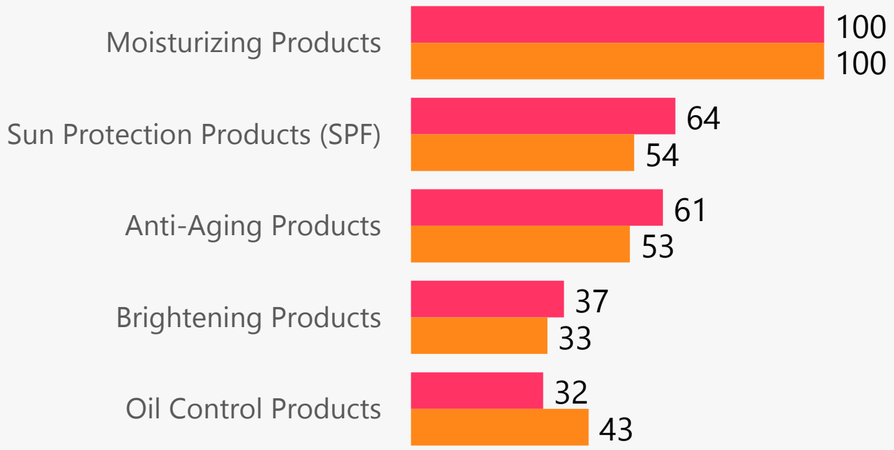
♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Women trend towards prevention in their routines and use a wider array of moisturizing formats, while men are more focused on active management of oil control.

Face Products Used 3+ Times/Week (%)

Base: Researches moisturizer before purchasing (female n=171; male n=114)



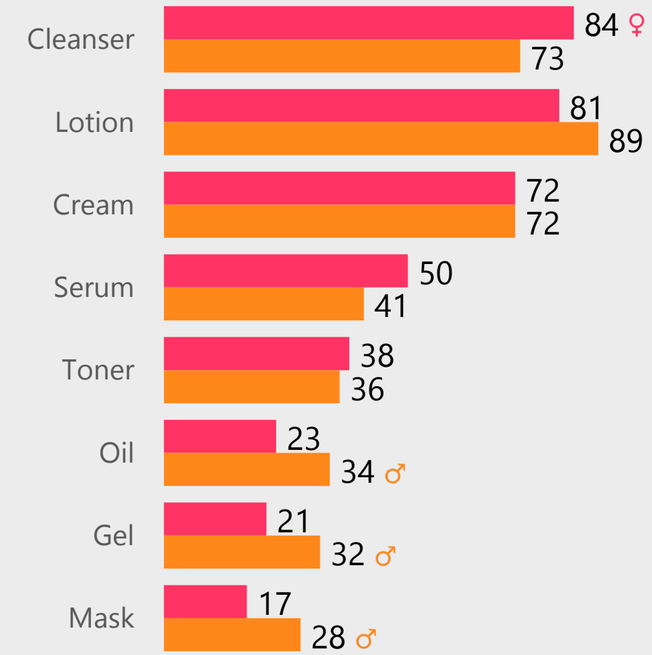
Note: To qualify for the survey, must have used moisturizing products 3+ times in the past week.

GENERATIONAL DIFFERENCES

Gen-Z and Millennial males are more likely than Gen-X and Boomer males to use masks 3+ times per week (36% vs. 13%).

Moisturizer Format Use 3+ Times/Week (%)

Base: Researches moisturizer before purchasing (female n=171; male n=114)



QUALITATIVE

*"I do my skincare routines so I can keep my skin looking as youthful as possible for as long as possible. To **preserve my skins current state** of youthfulness. And to **prevent** skin cracking which can speed up wrinkles and fine lines from forming." - Antonia, 47, female*

*"I like to use the Marlowe moisturizer specifically because it's a lightweight cream that doesn't make my skin **too oily**. This helps because I don't wake up feeling greasy, yet my face is still smooth and not irritated." - Drew, 22, male*

Q137. How long do you use the following skincare products on your face?
Q138. How often do you use the following types of products to moisturize your face?
Base: Researches moisturizer before purchasing (female n=171; male n=114)

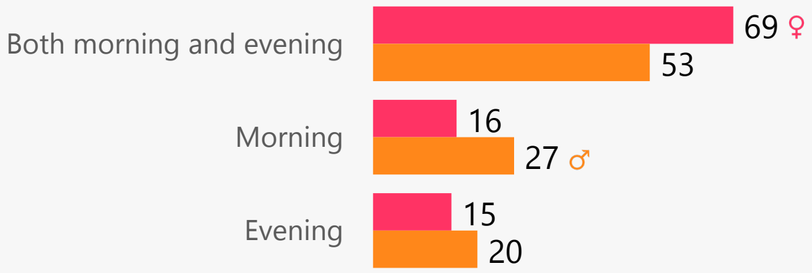
♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Skincare is a daily ritual of self-care, with over half of all users moisturizing twice a day. Women show deeper engagement, using a wider range of products.

QUALITATIVE

Timing of Moisturizer Use (%)



Number of Unique Products Used Daily (Average)

Female	3.14 ♀
Male	2.65

Moment that Matters
"My routine is more than just skincare- it's a daily act of self-respect and self-care so that I can be my best self."

SHOW & TELL



Women use a wider array of products in both morning and evening



Men tend to have more simplified routines with limited products that they use for both day and night.

Q210. How often do you use facial moisturizer?
Q215. Thinking about the entire day, on average, how many skincare products do you use in your skincare routine(s)? If you use a product twice a day, please only count it once.
Base: Total sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.









Purchase

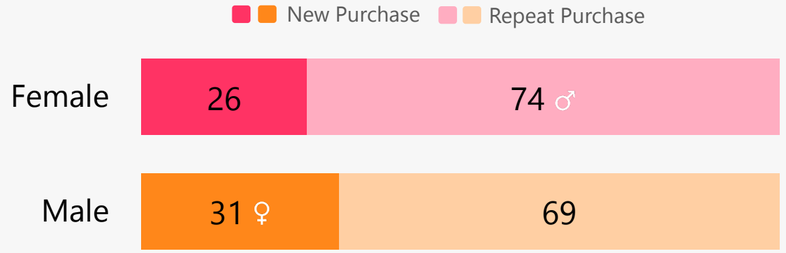
Female Male

Women are more cautious about incorporating new moisturizers into their carefully curated routines, whereas men generally follow simpler routines and are more receptive to trying new moisturizers.

Purchase Frequency (%)



New vs. Repeat Repurchase (%)



QUALITATIVE

Women often use different products for day and night or rotate through various products during the week. In contrast, men are more likely to use the same product for all occasions and, sometimes for their full body, and run out more quickly.

Q225. How often do you purchase facial moisturizer?
Q230. When purchasing a facial moisturizer, what percentage of the time are you buying a new product versus repurchasing one you've used before?
Base: Total sample (female n=183; male n=117)

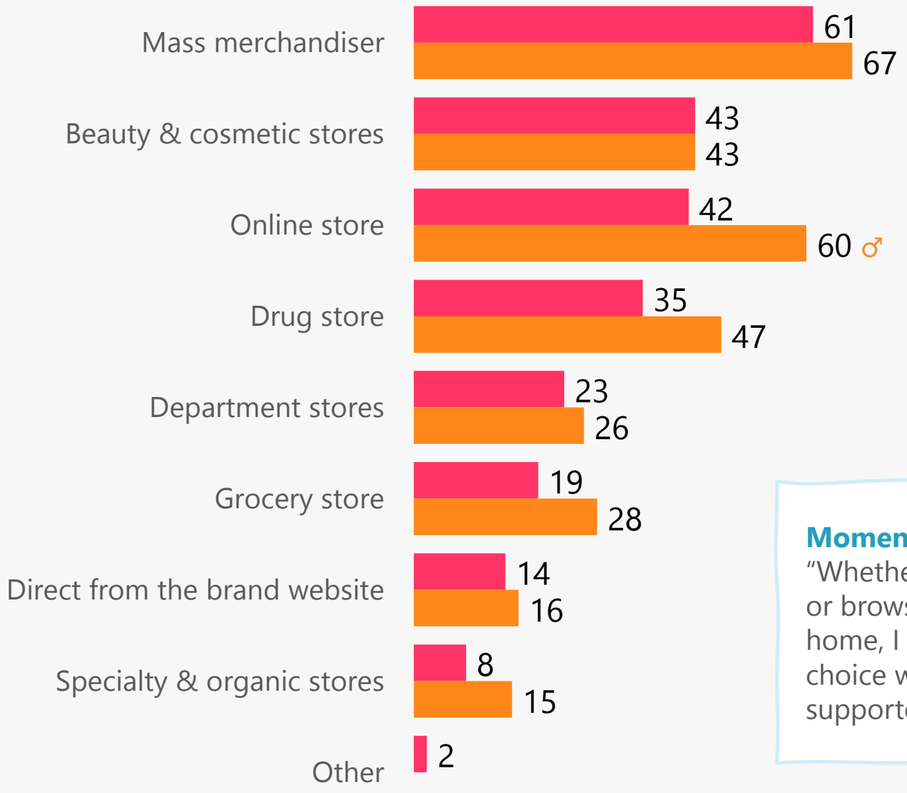
♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Consumers are most likely to buy in a physical store; however, men prefer to research at home prior to shopping, while women want hands-on discovery in stores.

Stores Purchased (%)

Base: Purchase item themselves (female n=182; male n=116)

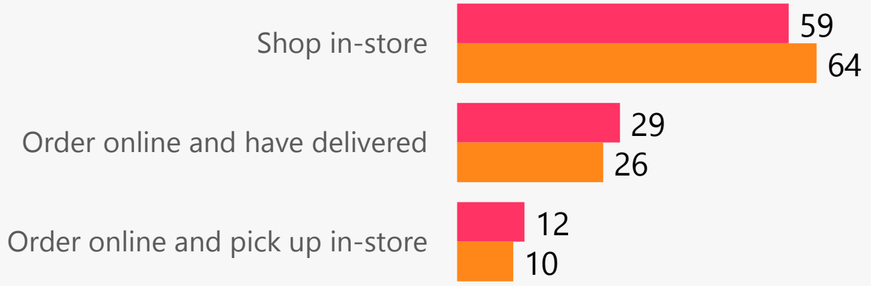


Moment that Matters

"Whether it's testing in-store or browsing reviews at home, I feel confident in my choice when I feel seen, supported and informed."

Purchase Channel Used Most Often (%)

Base: Purchase item themselves not directly from the brand website (female n=173; male n=116)



QUALITATIVE

Both genders go online for research to avoid feeling pressured and self-conscious in stores.

Women are more likely to shop specialty retailers like Ulta, Sephora and department stores, where they can test products, get personal guidance and feel confident trading up to higher quality brands.

The convenience of online purchasing is notable, but typically best for repurchasing a brand they're familiar with.

"[I felt] a little **embarrassed** standing in the middle of the aisle scrolling through reviews, a bit rushed as well." - Alexis, 23, female

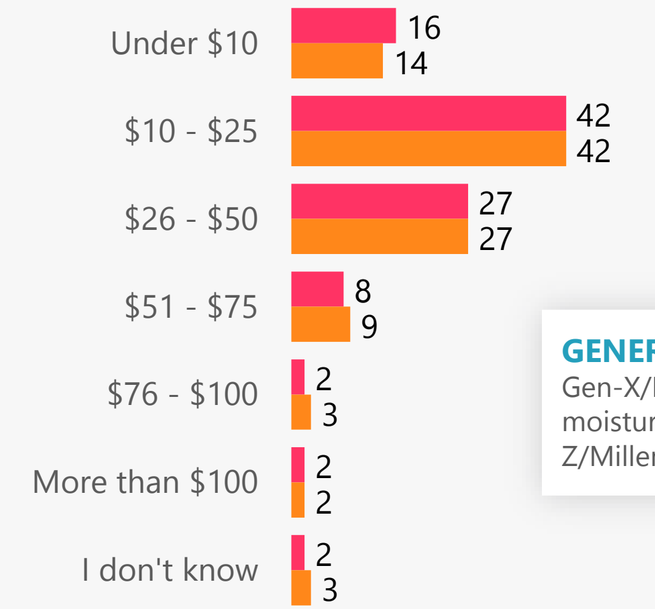
Q235. Where do you purchase facial moisturizer?
Q240. How do you purchase facial moisturizer most often?

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Female Male

Consumers tend to spend $10-25 on facial moisturizers, with around a quarter willing to spend $26-$50.

Average Spend at Each Price Point (%)



GENERATIONAL DIFFERENCES
Gen-X/Boomers spend **$26-$50** on a moisturizer more often than Gen-Z/Millennial consumers (34% vs. 22%).



QUALITATIVE

Consumers are willing to spend more to get better, more specialized results, exceptional moisturization, trusted, reputable brands and clean ingredients.

"I really like the idea of boosting my collagen [Sonage Collagen Boosting Serum, ~$50]." - Taylor, 33, female

"I'm using Curology (~$20) to get rid of my hormonal acne hoping that my dark spots disappear, they have this rich creamy moisturizer that doesn't dry out after I apply which I love." - Faida, 24, female

Q245. What percent of the time do you typically purchase facial moisturizers at the following price points?
Base: Total sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

The most popular facial moisturizer is CeraVe, particularly among men.

QUALITATIVE

Brand familiarity and reputation for effectiveness, non-greasy formulas, suitability for sensitive skin and affordability drive loyalty for CeraVe, Neutrogena and Olay.

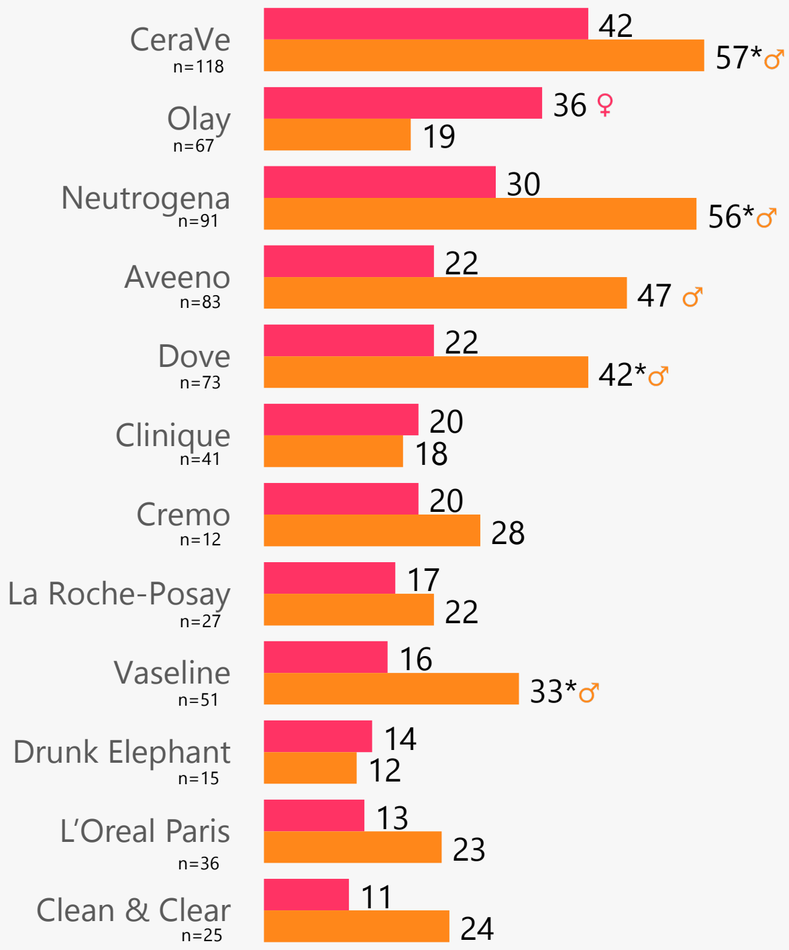
"CeraVe, it's fragrance free, lightweight. I have sensitive skin, so I can't have anything with fragrance." - Faida, 24, female

"The results are the main reason I keep using it [Olay]. I love how the product keeps my skin from getting too oily." - Jijo, 31, male

"I have used Neutrogena for many years. It is really hydrating." - Heidi, 58, female

Brands Used (%)

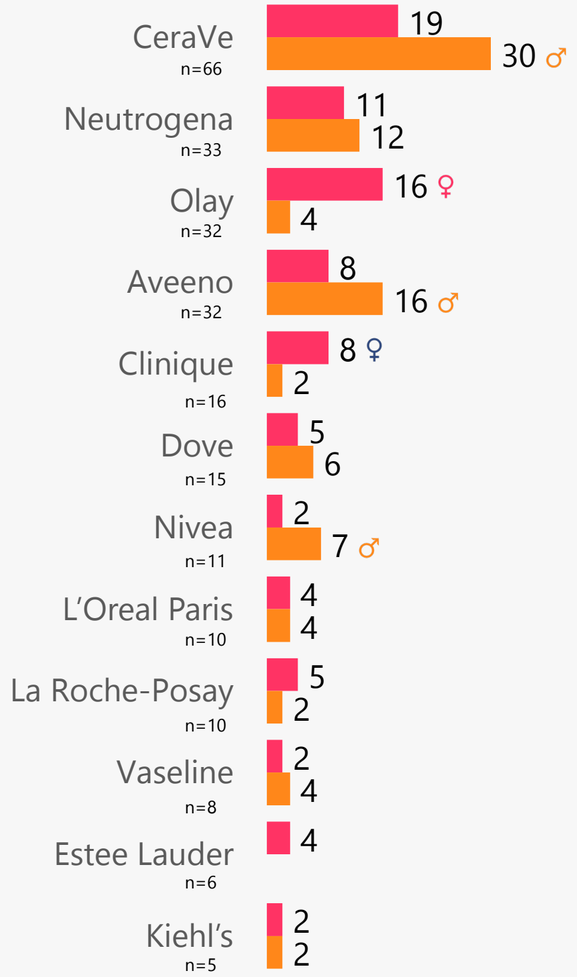
Base: Asked of brands aware of (n varies)



Only top 12 brands shown, click here to see full list.

Brand Used Most Frequently (%)

Base: Of those who have used each brand in the past 3 months (n varies)



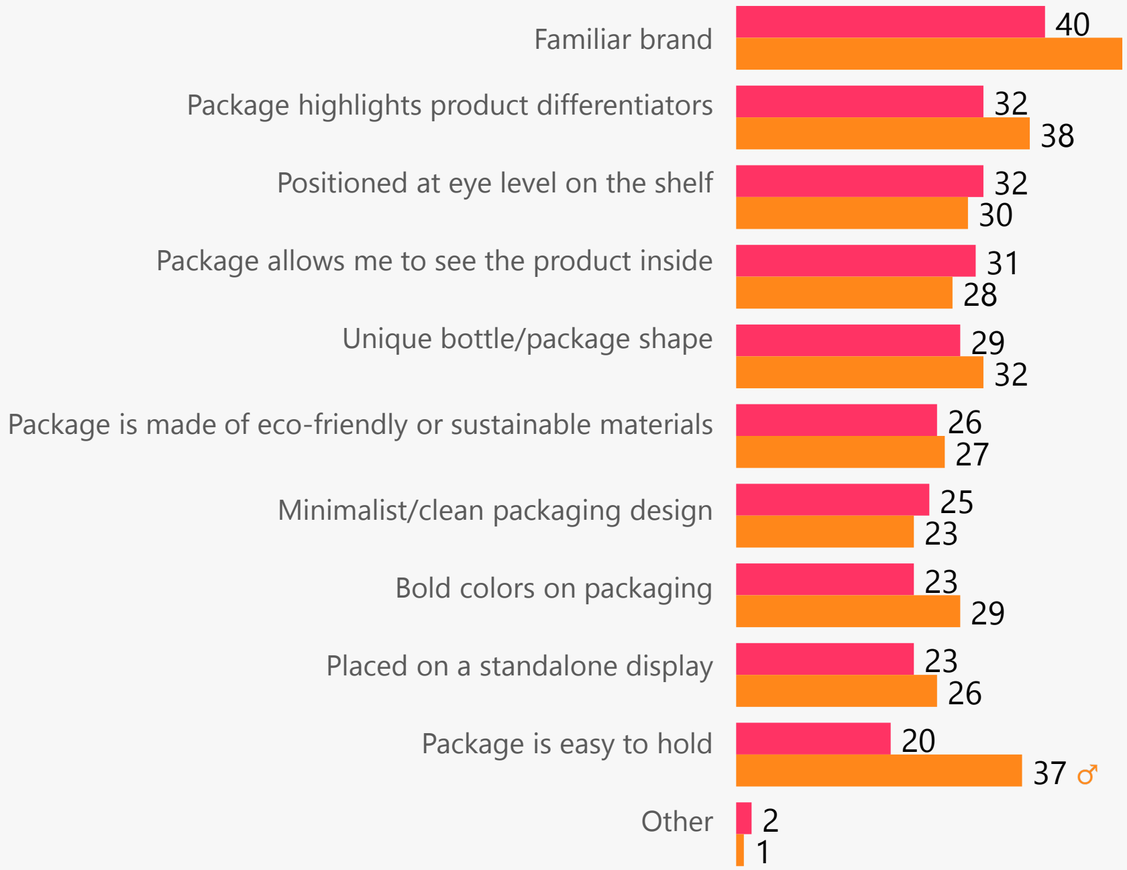
Q140. Which, if any, of these brands have you used in the past 3 months to moisturize your face?
Q241. Which facial moisturizer brand have you used most recently?
Base: Total sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.
*indicates small sample size.

Female Male

A familiar brand with packaging that clearly highlights product differentiators would stand out most among competitors.

Attributes to Differentiate a Facial Moisturizer (%)





QUALITATIVE

Men tend to be more pragmatic and practical when purchasing. Brand reputation and familiarity is a notable influencer.

Packaging design and sensorial attributes like scent and feel of the product engage women on a more emotional level and have a great influence.

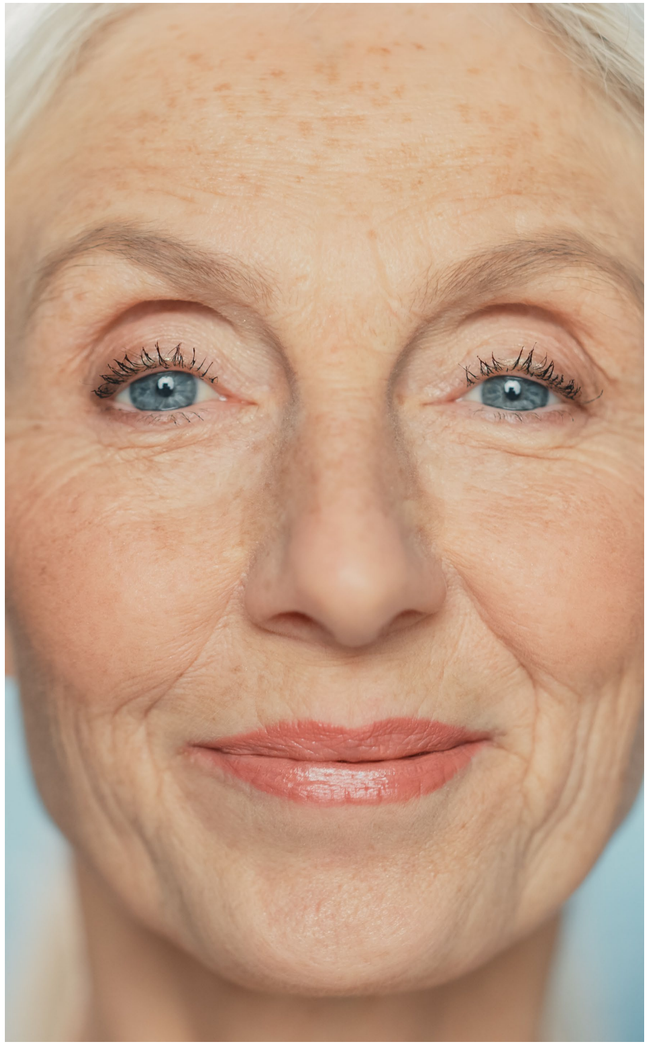
"Brand Reputation...I had used Neutrogena products for many years. I came across this moisturizer while shopping at a local store and was comfortable trying it." - Drew, 22, male

"The packaging was alluring—the idea of a hydrating water-based formula seemed much lighter and healthier than my previously used product(s)."
- Alexis, 23, female

"It says immediately it is 48-hour hydration within one week it visibly firms and smooths skin. In four weeks, a hundred percent had wrinkle reduction and deep wrinkles. It's got SPF30 which I'm a huge fan of." - Taylor, 33, female

Q320. What could make a brand of facial moisturizer stand out among its competitors?
Base: Total sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.









Product Experience

The first application is a critical moment where consumers experience an emotionally driven, sensory journey that heavily influences repurchase potential.



PRODUCT EXPERIENCE

ctrl+click icon
to view video

QUALITATIVE

Product texture, spread-ability, quick absorption and fragrance compatibility are most prominent product attributes that stand out in this moment of initial application.

Consumers expect an immediate, visible change in their skin that indicates that the product is delivering hydration as they continue to monitor overall effects across several days.

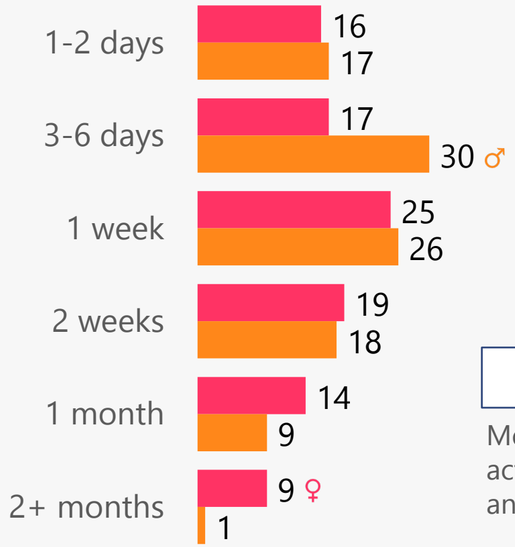
MOMENT THAT MATTERS

“It’s the quiet confidence that comes from visible change — not just in my skin, but in my mood."

Female Male

Men tend to need less time to assess if their moisturizer is working, with about a third saying they need just 3-6 days. They are more likely than women to feel relaxed and excited after moisturizing.

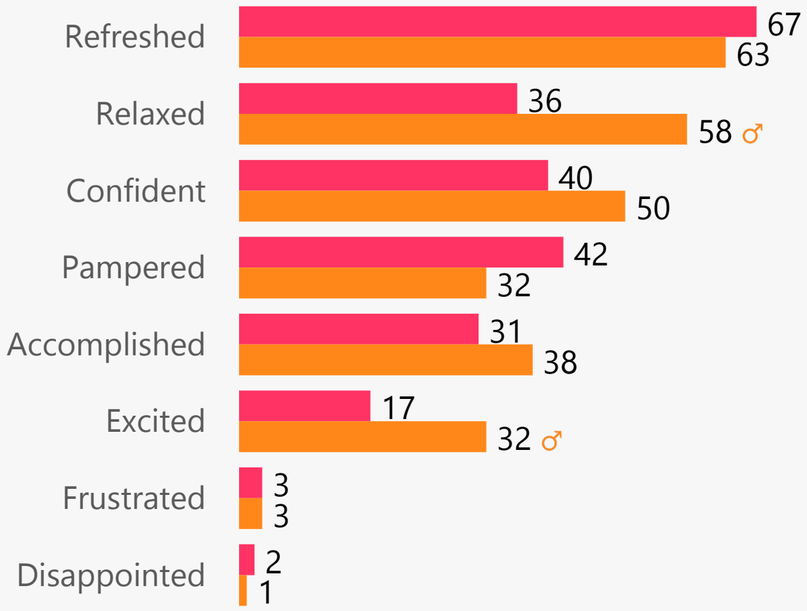
Length of Time Needed to Know if Moisturizer is Working (%)



QUALITATIVE

Men often experience actively dry or irritated skin and are seeing quick relief.

Emotions After Using Moisturizer (%)



QUALITATIVE

Women often have more established skincare routines, with moisturizers serving as a key part of a broader self-care regimen. Their emotional responses—feeling refreshed, pampered, and accomplished—suggest that the product is reinforcing a routine that's already purposeful and rewarding.

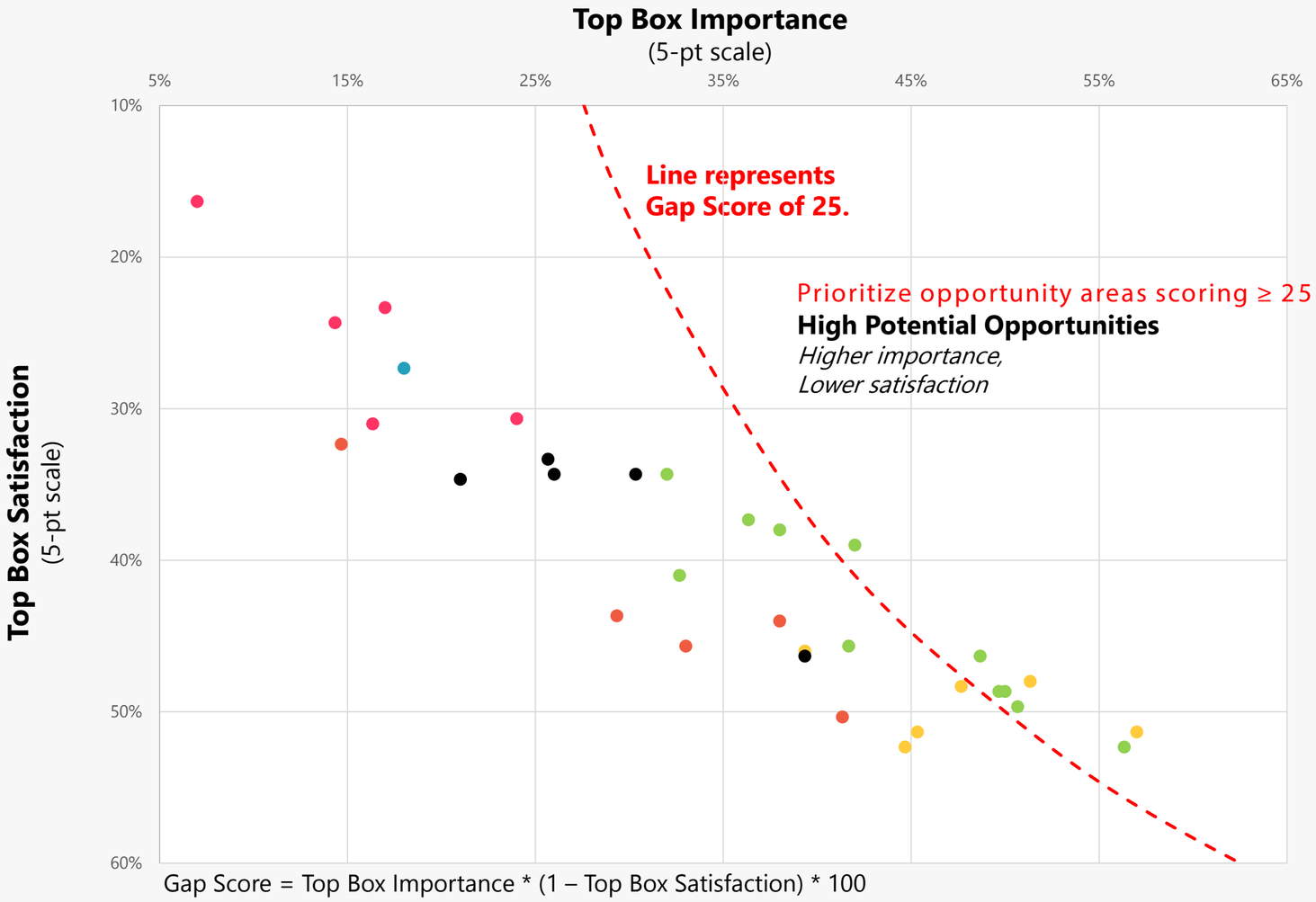
For men, skincare may not be as deeply ingrained, making the use of a moisturizer feel more novel or even indulgent. This can spark stronger emotional reactions like feeling relaxed, confident, or excited, as the product experience represents a departure from the norm and a positive investment in themselves.

Q216. How long do you usually have to use a facial moisturizer to know if it's working?
Q250. How do you typically feel after using a facial moisturizer?
Base: Total sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Feel on skin and *results* exhibit high potential for fulfilling unmet market needs.

Consumers want moisturizers that not only perform by relieving dryness, enhancing skin health, and delivering visible results, but also feel good during and after use.



- Discovery
- Shopping and Purchase Process
- Product Experience – Feel on Skin
- Product Experience – Attributes
- Product Experience – Results

The unmet needs are:

- Leaves skin soft and smooth
- Relieves dry skin
- Is not sticky after application
- Replenishes skin moisture
- Provides long-lasting moisture
- Enhances skin health
- Reduces/prevents signs of aging
- Makes my skin feel more comfortable
- Does not look oily

Q300: How important are the following when deciding what facial moisturizer to purchase?
Q305: In general, how satisfied are you with skincare brands being able to provide facial moisturizers that meet each of these needs?
BASE: Total Sample (n=300)

Women have a broader set of unmet needs driven by a desire for visible results, while men focus primarily on skin relief and comfort.

QUALITATIVE

"I was hoping that the products would improve my skin, eliminate hyperpigmentation, and make my skin youthful and hydrated." - Furyal, 59, female

"I was hoping that it would get rid of my flakiness in my face and clear up any redness. I tend to overuse acne products either when I see a breakout or just feel my skin becoming too oily. This habit leads to insanely dry skin." - Drew, 22, male

Opportunities by Gender

Gap Score of 25 or higher

♀ Female	Category	Gap Score	Top Box Importance	Top Box Satisfaction
Leaves skin soft and smooth.	Feel on skin	29	64%	56%
Enhances skin health.	Results	28	53%	46%
Reduces/prevents signs of aging.	Results	28	46%	39%
Relieves dry skin.	Results	27	55%	51%
Is not sticky after application.	Feel on skin	27	56%	51%
Replenishes skin moisture.	Results	27	55%	51%
Provides long-lasting moisture.	Results	27	56%	51%
Makes my skin feel more comfortable.	Results	27	52%	49%
Does not look oily.	Feel on skin	26	53%	51%
Makes my skin look more youthful.	Results	26	42%	38%
Provides noticeable results after a few uses.	Results	25	40%	38%

♂ Male				
Relieves dry skin.	Results	26	58%	55%
Leaves skin soft and smooth.	Feel on skin	25	45%	44%
Is not sticky after application.	Feel on skin	25	44%	43%

Gap Score = Top Box Importance * (1 – Top Box Satisfaction) * 100

Q300. How important are the following when deciding what facial moisturizer to purchase?
Q305. In general, how satisfied are you with skincare brands being able to provide facial moisturizers that meet each of these needs?
Base: Researches moisturizer before purchasing (female n=171; male n=114)

Quick absorption, soothing sensory experience, fragrance compatibility, and minimal ingredients are <u>delighters</u> that can positively influence repeat purchasing.

Quick Absorption
Gap Score: 22

Rapid absorption enhances the experience by making skin feel comfortable, smooth, and hydrated, without a heavy or sticky feel. It ensures proper delivery to the skin and helps prevent makeup issues like caking or cracking throughout the day.

"I like how it [Clinique Smart Clinical Repair] absorbs quickly. Makes me feel like fine lines are soaking up enough moisture to feel plumped." - Antonia, 47, female

Minimal Ingredients & Transparency
Gap Score: 20

Gen X and Boomer women are more likely to actively seek out natural, clean and minimal ingredient labels.

They look for on-pack cues like known ingredients (i.e., coconut oil, avocado oil, shea butter, essential oils) or attributes associated with minimal ingredients (i.e., fragrance-free, gentle formulas) to guide selection.

"It says that 97% [of ingredients] are of natural origin, but sadly you look at the ingredient list. There's a bunch of chemicals in there...I regret purchasing this [Thayers's Soak It Up 80Hr Liquid Moisturizer]." - Eric, 45, male

Soothing Sensory Experience
Gap Score: 19

A smooth, lightweight, and non-greasy texture is preferred for a comfortable and pleasant application, avoiding heaviness or greasiness.

Sensorial delighters like cooling, soothing, or refreshing sensations, enhances the user experience, making the skincare routine more enjoyable and encouraging consistent use.

"I was hoping it [Up & Up Daily Moisturizing Lotion] would moisturize my skin without feeling like a super thick sludge was put on my skin and leaving that greasy feeling." – Kaitlyn, 21, female

"It [L'Oreal Paris Hydra Renewal] feels so soothing and relaxing. I'm loving it....just replenishing your skin....it feels so good." - Anthony, 33, male

Fragrance
Gap Score: 17

While it's not a key driver of purchase, fragrance liking can help drive or detract from potential repurchase.

The scent of a product plays a key role in shaping the overall user experience. An appealing fragrance can enhance satisfaction, while one that is unpleasant or overpowering (including strong SPF smell) can negatively impact perception, even if the product performs well.

"The fragrance made me hesitant to use it [Neutrogena Hydro Boost Water Gel]. I don't like the fragrance, because I'm very sensitive about the smell." – Amy, 46, female

"The scent is refreshing and masculine [EveryMan Jack- Sandalwood Beard + Face Recovery Lotion]." – Mike, 33, male

Common pain points like short-lasting hydration, poor dispensing experiences and pore-clogging formulas cause consumers to avoid repurchase.

Effects Not Lasting

Short-lasting hydration can cause discomfort and increased oil production, negatively affecting makeup appearance and longevity for women. Long-lasting hydration integrates smoothly into routines, offering convenience and enhancing perceived value.

"Although my face felt hydrated after applying the moisturizer [Aveeno Daily Moisturizing Face Lotion], by the end of the day my face felt dry again. It felt like it wasn't going to improve my dry face and that it was only going to be a temporary feeling." – Monique, 47, female

Pore Clogging Formulas

Clogged pores from thick, heavy or oily moisturizing products can cause acne, blackheads, and other skin issues rather than support healthy looking skin.

Consumers look for communications on pack that tout oil-free formulas and soothing/ calming properties.

"It [CeraVe AM Facial Moisturizing Lotion with SPF] absorbs quickly but dried out my skin and I had to reapply throughout the day. Then my face felt clogged." – Stephanie, 45, female

Premium Products Without Results

When expensive moisturizers fail to meet expectations, consumers feel disappointed. Brands that consistently deliver results ease this frustration and earn lasting loyalty. Tariffs are beginning to influence shoppers' behaviors and will continue to be a key factor in their moisturizer choices.

"I would say this product [Neutrogena Oil-Free Moisture Combination Skin] made me feel a little disappointed. I think I had such a high expectation for a lot of these products because of their brand and price." – Drew, 22, male

"I wish there was trial sizes you would be able to get in order to try the product before you actually buy a regular sized container just because if the product does not work for me, then it will be a waste of that product, plus money and time I am spending researching that product as well." – Jijo, 31, male

Packaging

Packaging that makes it difficult-to-extract every bit of product and pumps prone to clogging frustrate consumers. This impacts their perception of value and can deter repurchase.

"Sometimes it gets stuck down there and then you have to open it and unclog it... I can't stand that" – Hillary, 37, female

APPENDIX

Women are more exploratory and brand-aware; men stick to fewer, familiar names.

Top Brands Aware Of (%)

Brand	Total	Women	Men
Aveeno	88	90	86
CeraVe	83	84	80
Dove	83	85	79
Neutrogena	78	84 ♀	69
Vaseline	76	77	75
L'Oreal Paris	73	78 ♀	67
Olay	73	80 ♀	62
Clinique	70	83 ♀	51
Old Spice	69	65	75
Nivea	69	69	68
Maybelline	68	78 ♀	53
Estee Lauder	62	70 ♀	50
Lancome	57	69 ♀	38
Clean & Clear	56	68 ♀	38
Axe	56	49	68 ♂
Aveda	55	63 ♀	43
La Roche-Posay	49	58 ♀	35
Johnson's	48	49	46

Brand Cont.	Total	Female	Male
Native	45	52 ♀	33
Garnier SkinActive	43	51 ♀	32
Yves Saint Laurent Beauty	38	45 ♀	28
Bobbi Brown	38	52 ♀	15
Kiehl's	37	45 ♀	25
Drunk Elephant	36	50 ♀	15
Dermalogica	34	40 ♀	24
Philosophy	33	45 ♀	13
L'Occitane	30	37 ♀	18
Origins	29	40 ♀	10
SkinCeuticals	26	31 ♀	18
Shiseido	24	33 ♀	10
La Mer	21	28 ♀	9
Cremo	16	11	25 ♂
Youth to the People	13	19 ♀	5
Tatcha	11	16 ♀	3
ELEMIS	8	11 ♀	3
Other	2	3	1



Click here to return to the main report.

Q139. Which, if any, of these brands are you aware of?
Base: Total Sample (female n=183; male n=117)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.

Men over index on a few familiar brands; women explore a wider range.

Brands Used Past 3 Months (%)

Brand	Total	Women	Men
CeraVe	48	42	57 ♂
Neutrogena	39	30	56 ♂
Aveeno	31	22	47 ♂
Olay	31	36 ♀	19
Dove	29	22	42 ♂
Cremo	24	20	28
Vaseline	22	16	33 ♂
Clinique	19	20	18
Nivea	18	5	41 ♂
La Roche-Posay	18	17	22
L'Oreal Paris	16	13	23
Clean & Clear	15	11	24
Drunk Elephant	14	14	12
Kiehl's	13	11	21
SkinCeuticals	13	7	29 ♂
Aveda	11	9	16
Philosophy	11	7	33 ♂
Dermalogica	11	7	21

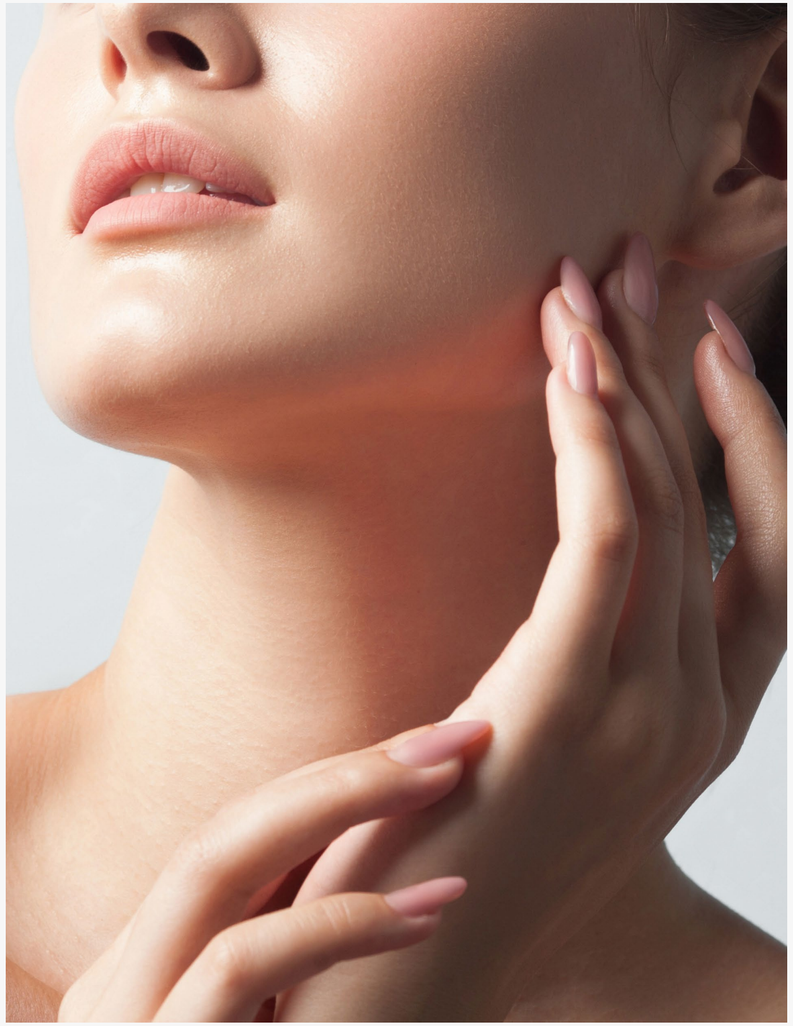
Brand Cont.	Total	Female	Male
Old Spice	10	1	22 ♂
Native	10	2	28 ♂
Estee Lauder	10	9	10
Sheishedo	10	7	25
ELEMIS	9	10	-
Axe	8	1	16 ♂
Garnier SkinActive	8	4	16
Youth to the People	8	9	-
Johnson's	7	3	13
Maybelline	7	6	10
L'occitane	7	1	24 ♂
Thatcha	6	3	25
Bobbi Brown	5	4	11
Lancome	5	5	7
Orgins	3	3	8
La Mer	3	2	9
Yves Saint Laurent Beauty	1	-	3
Other	5	7	3



Click here to return to the main report.

Q140. Which, if any, of these brands have you used in the past 3 months to moisturize your face?
Base: Asked of brands aware of (n varies)

♀/♂ (Female/Male) Icons indicate that metric is significantly higher for the group represented by that icon. Significance is tested at a 95% confidence level.



Gap Score = Top Box Importance * (1 – Top Box Satisfaction) * 100
Prioritize opportunity areas scoring ≥ 25.

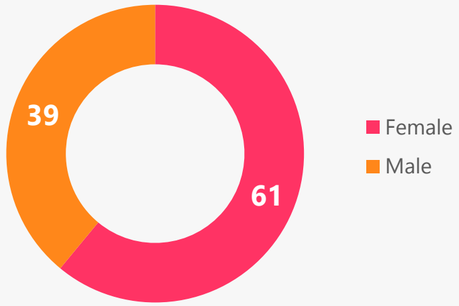
Click here for additional details on all Opportunity Areas.

Q300: How important are the following when deciding what facial moisturizer to purchase?
Q305: In general, how satisfied are you with skincare brands being able to provide facial moisturizers that meet each of these needs?
BASE: Total Sample (n=300)

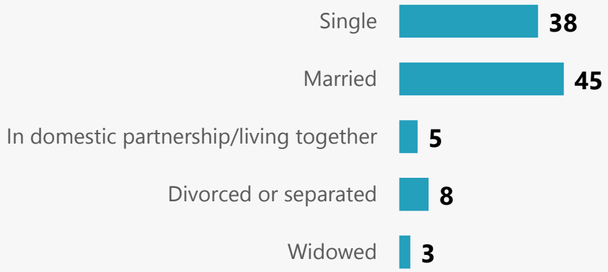
	OPPORTUNITY AREAS	CATEGORY	GAP SCORE	Top Box Importance	Top Box Satisfaction
1	Leaves skin soft and smooth.	Feel on Skin	**28**	57%	51%
2	Relieves dry skin.	Results	**27**	56%	52%
3	Is not sticky after application.	Feel on Skin	**27**	51%	48%
4	Replenishes skin moisture.	Results	**26**	51%	50%
5	Provides long-lasting moisture.	Results	**26**	50%	49%
6	Enhances skin health.	Results	**26**	49%	46%
7	Reduces/prevents signs of aging.	Results	**26**	42%	39%
8	Makes my skin feel more comfortable.	Results	**25**	50%	49%
9	Does not look oily.	Feel on Skin	**25**	48%	48%
10	Makes my skin look more youthful.	Results	24	38%	38%
11	Works well with other skincare products in my routines.	Results	23	42%	46%
12	Provides noticeable results after a few uses.	Results	23	36%	37%
13	Absorbs into my skin quickly.	Feel on Skin	22	45%	51%
14	Is lightweight on my skin.	Feel on Skin	21	45%	52%
15	Is a brand that I trust.	Shopping	21	41%	50%
16	Does not require re-application throughout the day.	Feel on Skin	21	39%	46%
17	Product is designed for my skin type.	Attributes	21	39%	46%
18	Packaging provides ingredient details.	Shopping	21	38%	44%
19	Reduces/prevents acne and blemishes.	Results	21	32%	34%
20	Product is made with natural ingredients.	Attributes	20	30%	34%
21	Soothes irritated skin.	Results	19	33%	41%
22	Packaging explains product benefits.	Shopping	18	33%	46%
23	Packaging indicates the skin type it is designed for.	Shopping	17	29%	44%
24	Product has a pleasant scent.	Attributes	17	26%	34%
25	Product is fragrance-free.	Attributes	17	26%	33%
26	Product is recommended by a dermatologist/esthetician.	Discovery	17	24%	31%
27	Product contains SPF.	Attributes	14	21%	35%
28	Product is made with organic ingredients.	Attributes	13	18%	27%
29	I can sample the product before purchasing.	Discovery	13	17%	23%
30	Product is recommended by friends/family.	Discovery	11	16%	31%
31	There are easy-to-access video reviews of the product.	Discovery	11	14%	24%
32	Product packaging is visually appealing.	Shopping	10	15%	32%
33	Product is recommended by an influencer.	Discovery	6	7%	16%

DEMOGRAPHICS

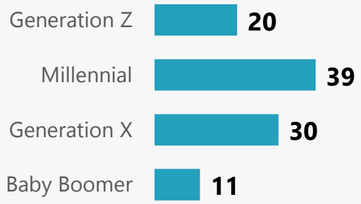
Gender (%)



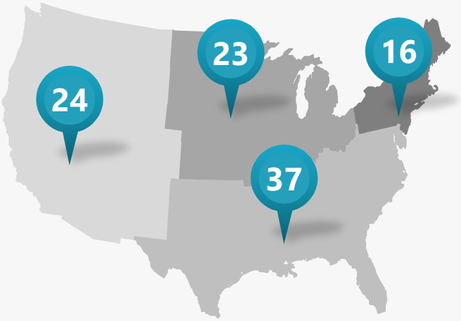
Marital Status (%)



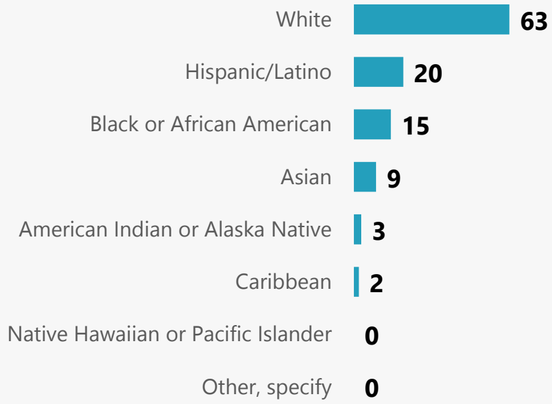
Generation (%)



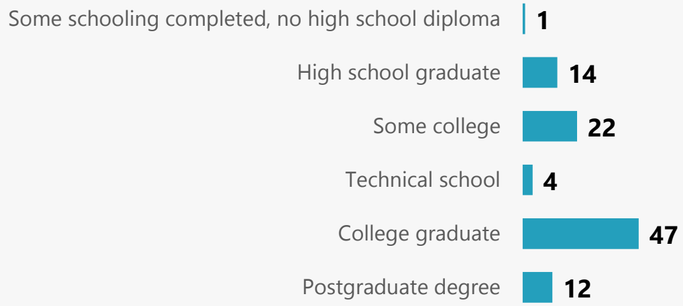
Region (%)



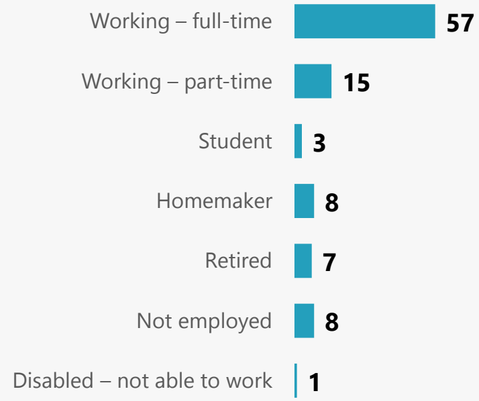
Ethnicity (%)



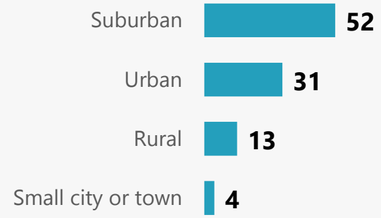
Education (%)



Employment Status (%)



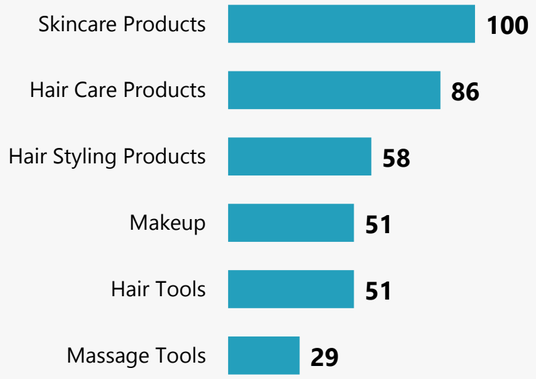
Area Live (%)



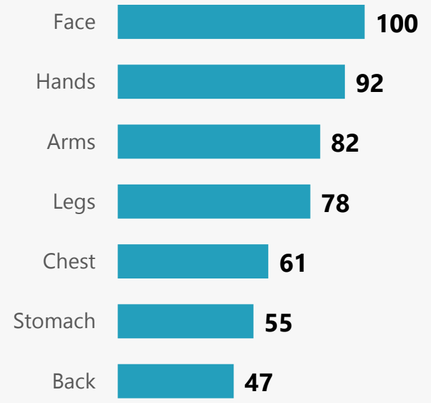
BASE: Total Sample (n=304)

DEMOGRAPHICS

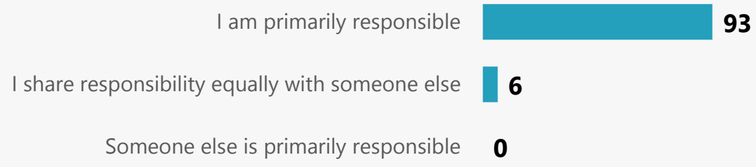
Beauty Products Used (%)



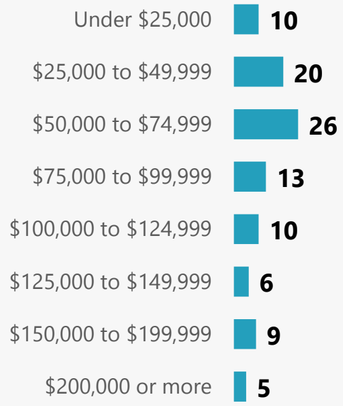
Application Frequency (%)



Decision Maker (%)



HHI (%)



Q135. How often do you use the following products?
Q136. How often do you apply skincare products to the following parts of your body?
Base: Total sample (n=300)

CONTACT US

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