

SPECIAL REPORT

Uncovering Growth Opportunities in Skincare through Behavioral Segmentation

Insights from 3,500+ consumers across the
US, UK, and France | 2025



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Context: A new era for facial skincare

The facial skincare category has long been structured around product formats, age brackets and skin types. But in a post-pandemic, digitally accelerated world, these traditional segmentations no longer capture how people choose, use and value skincare. Today's consumers navigate skincare as an extension of their personal identity – not just through price points or claims, but through emotional connections, ethical stances, and ritualised behaviours.

Since COVID-19, the facial skincare market has seen an acceleration toward "clinical" positioning - brands anchored in science, efficacy, and credibility. While this trend predates the pandemic, it has been reinforced by increasingly educated consumers and a heightened demand for trust. Medical-grade claims, minimalist packaging, and dermatological language gained traction, prompting more brands to adopt performance-led propositions.

Yet behind this clinical boom, the category is undergoing deep structural shifts. Growth is increasingly concentrated in digitally native brands (that have then gone retail), and while the overall market continues to expand, consumer behaviour is fragmenting in ways that challenge traditional brand logic.

Three forces are at play:

- 1. Blurring of boundaries** between clinical, sensorial and natural propositions is making it harder for consumers to navigate the category. Once distinct brand cues have converged. Brands now make similar claims, confusing consumers and diluting brand meaning.
- 2. Increased experimentation and routine mixing**, driven by social media, peer reviews and diagnostic tools, is undermining loyalty. Consumers no longer build routines around brands – they assemble routines from brands, making them more open to trial but harder to retain over time.
- 3. Diverging attitudes** toward skincare's role – as self-care, science, or hygiene – are reshaping how consumers define value. For some, skincare is a mindful ritual; for others, it's a results-driven task or a minimalist necessity. These underlying beliefs drive different expectations and purchasing logic.

These changes are not superficial. They affect spend concentration, channel influence, innovation receptivity and long-term lifetime value. As we show in this report, brands that fail to segment with precision are at risk of overspending on fickle users and underinvesting in loyalists.

Together, these dynamics demand a more nuanced view of the category – one that aligns with how consumers actually choose, prioritise, and stay loyal to brands. This report introduces that lens, grounded in real behaviours rather than outdated assumptions.

1. Research approach

To better reflect the shifts outlined above, we built a behavioural segmentation rooted in how people think, feel, shop and engage with skincare. This model reflects what we have observed repeatedly in our work: that traditional category lenses obscure more than they reveal. Whether valuing an asset pre-deal, building a portfolio entry strategy, identifying untapped growth levers across segments, or shaping a turnaround plan, this segmentation has proven critical to unlocking untapped growth and identifying defensible brand territory.

L.E.K., in partnership with the primary research firm Potloc, surveyed over 3,500 facial care consumers across the US, UK and France. Leveraging Potloc's precision sampling capabilities and our own strategic segmentation frameworks, we applied machine learning to a combined set of behavioural and attitudinal data – looking at how consumers think, feel, shop and use skincare.

The output? Eight distinct consumer profiles, each defined by:

- **Mindset and expectations**
- **Complexity of routine and expertise**
- **Channel and source preferences**
- **Emotional vs functional orientation**
- **Attitudes toward pricing, efficacy, and ethical claims**
- **Influencer and authority trust (e.g., dermatologists vs peers)**
- **Preferred information formats (e.g., reviews, packaging cues, expert guidance)**

These segments span the emotional – functional spectrum and map clearly onto both spend behaviour and loyalty. While rooted in behavioural science, they are designed for commercial application.

Figure 1

Beyond usage: A segmentation model grounded in real behavior and emotion



Source: L.E.K. and Potloc survey, L.E.K. research and analysis

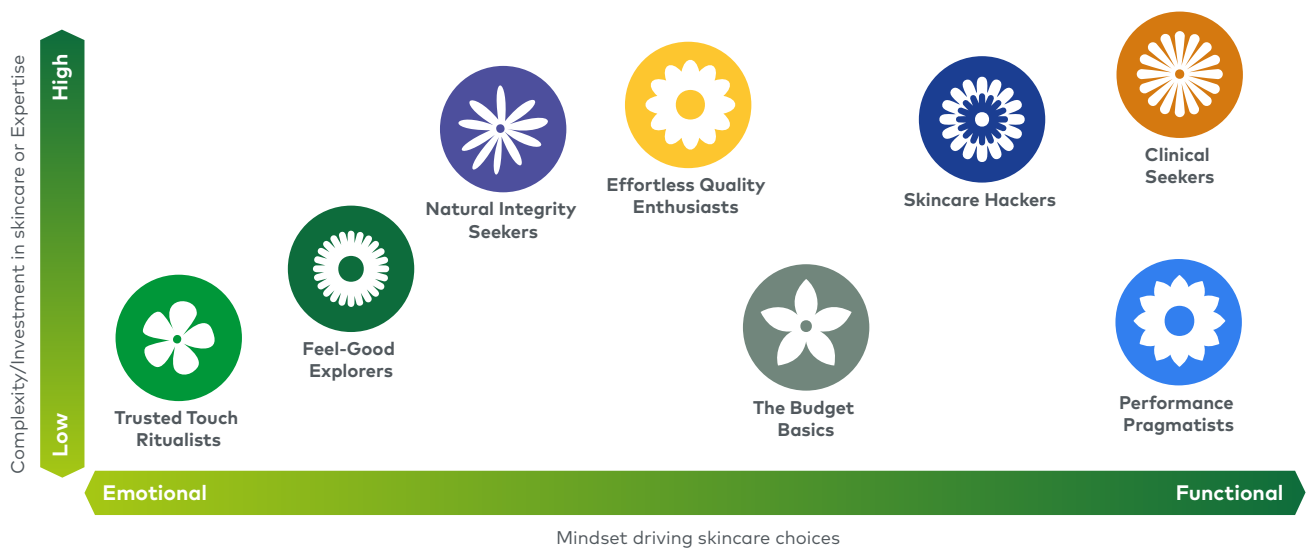


2. Eight distinct consumer segments

Our segmentation maps consumers along an emotional ↔ functional spectrum and positions them by their level of investment and expertise in the category. The eight resulting segments represent fundamentally different needs, yet all coexist in the same category.

Figure 2

The behavioral landscape of skincare: Mapping consumers by mindset and routine complexity

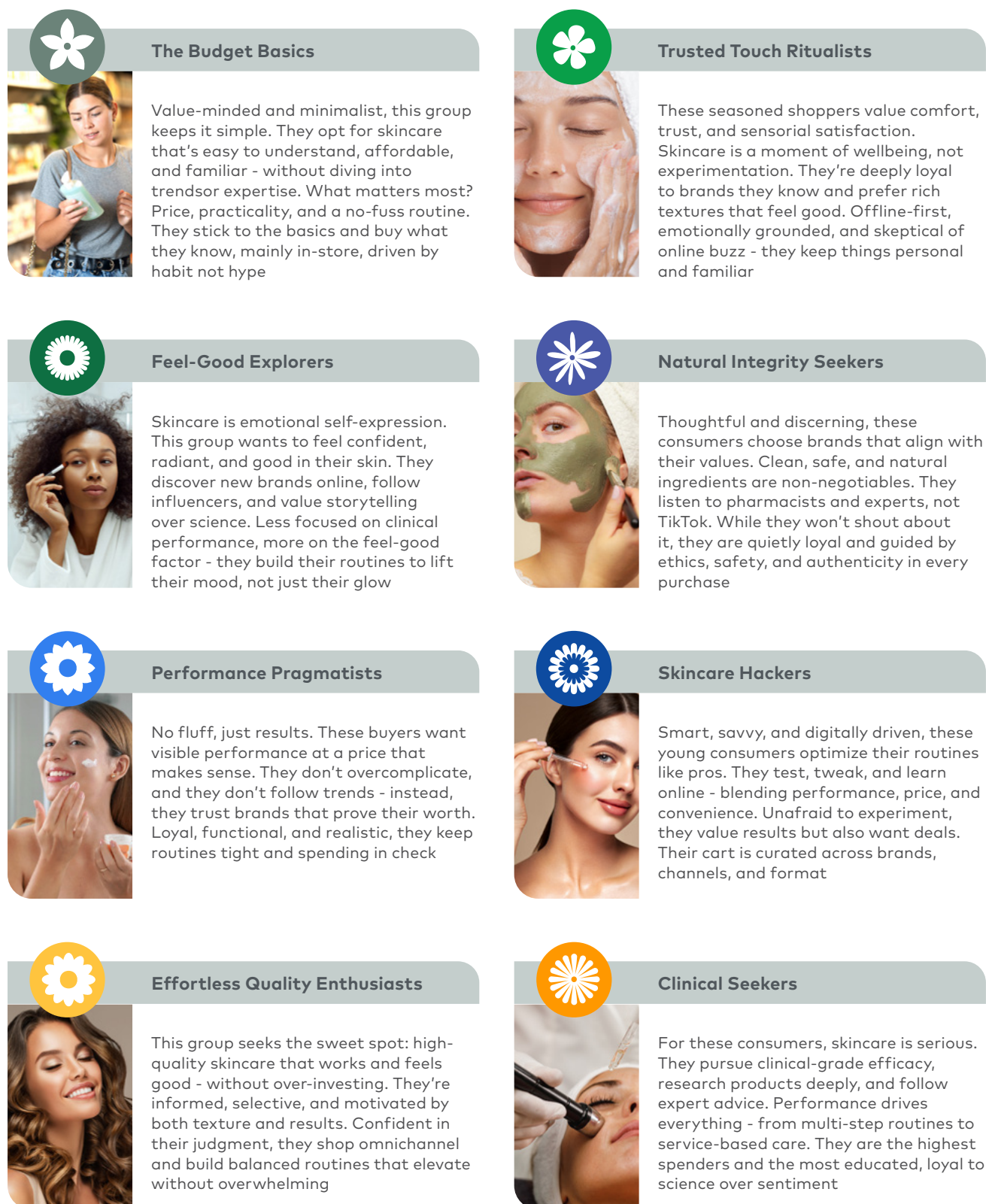


Source: L.E.K. and Potloc survey, L.E.K. research and analysis



Figure 3

Inside the segments: Profiles that define modern facial skincare consumers



Source: L.E.K. and Potloc survey, L.E.K. research and analysis

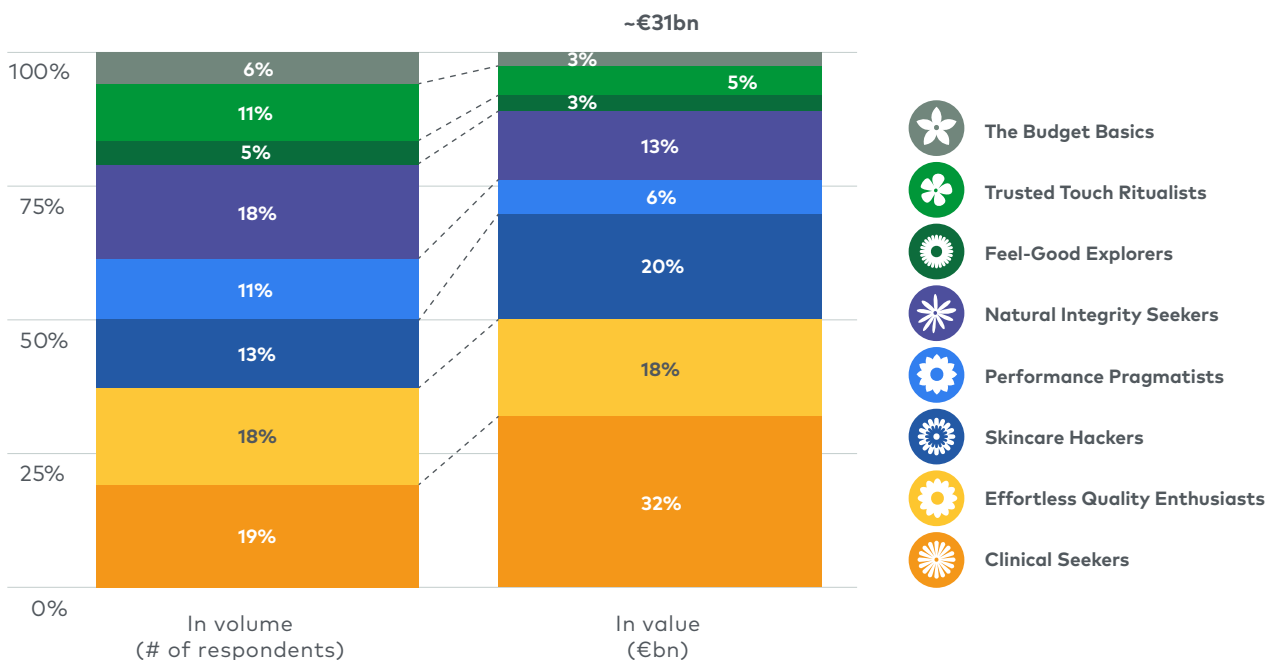
3. Not all segments are created equal

The facial skincare market across the US, UK and France may be worth €31 billion (source Euromonitor), but that value is not evenly distributed – nor is it equally accessible. Different segments show striking differences in both current contribution and future potential. Understanding this unevenness is critical to identifying the best bets for sustainable growth.

Figure 4

Segment value is uneven: Identifying where the money (really) is in facial skincare

Market size (US, UK, France) - 2024



Source: L.E.K. and Potloc survey, L.E.K. research and analysis

Clinical Seekers, for example, make up just 19% of the consumer base but drive 32% of market value. Their average annual spend of €350 – 460 is more than double the category average, and they have powered much of the post-COVID growth wave. Yet they are not alone in driving value. Segments like Effortless Quality Enthusiasts and Skincare Hackers also punch above their weight, with spend patterns and growth trajectories that rival or exceed Clinicals in several markets.

Figure 5

Clinical Seekers drive the highest current and future spend - combining clinical discipline with skincare investment

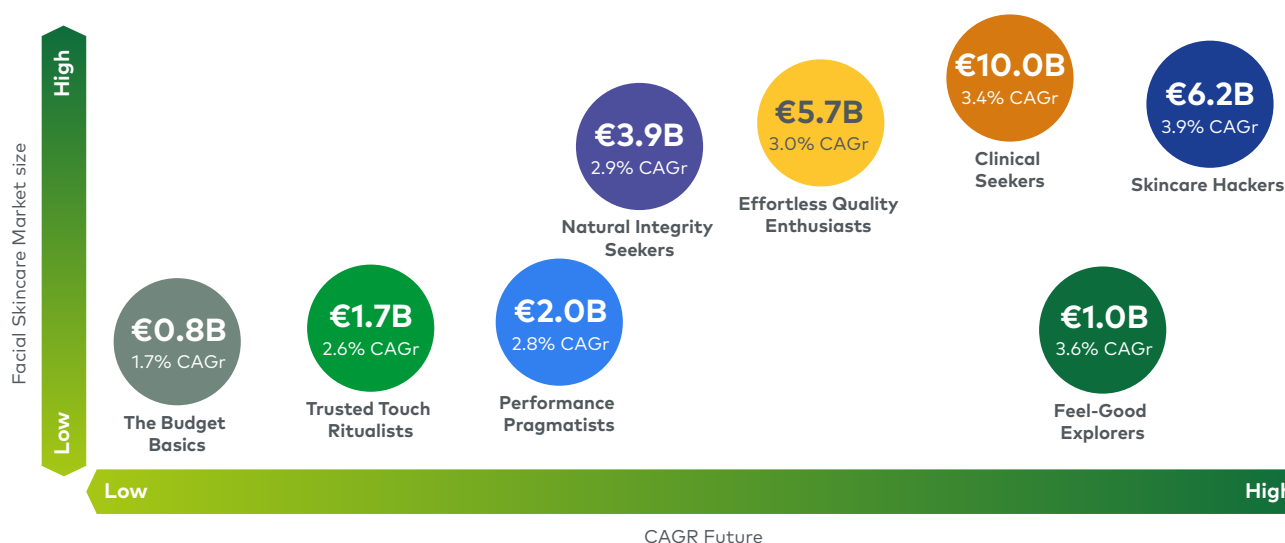
	The Budget Basics	Trusted Touch Ritualists	Feel-Good Explorers	Natural Integrity Seekers	Performance Pragmatists	Skincare Hackers	Effortless Quality Enthusiasts	Clinical Seekers
Annual average spending	€115-140	€135-170	€130-210	€180-200	€130-150	€305-400	€220-275	€350-460
Market average: €210-320								
Spend increase in the last 2 years in CAGR	2.3%	3.1%	3.7%	4.2%	4.1%	5.2%	4.3%	4.8%
Market average: 4.2%								
Spend increase in the next 2 years in CAGR	1.7%	2.6%	3.6%	2.9%	2.8%	3.9%	3.0%	3.4%
Market average: 2.9%								

Source: L.E.K. and Potloc survey, L.E.K. research and analysis

Looking ahead, future growth is expected to tilt toward younger, digitally engaged, and experience-seeking segments. Feel-Good Explorers and Skincare Hackers, though smaller today, show strong forward growth and high openness to discovery and new formats. In contrast, Budget Basics and some heritage-led segments face lower growth and remain highly price-sensitive, limiting their upside potential.

Figure 6

Where growth is heading: Skincare Hackers, Feel-Good Explorers and Clinical Seekers point to future opportunity



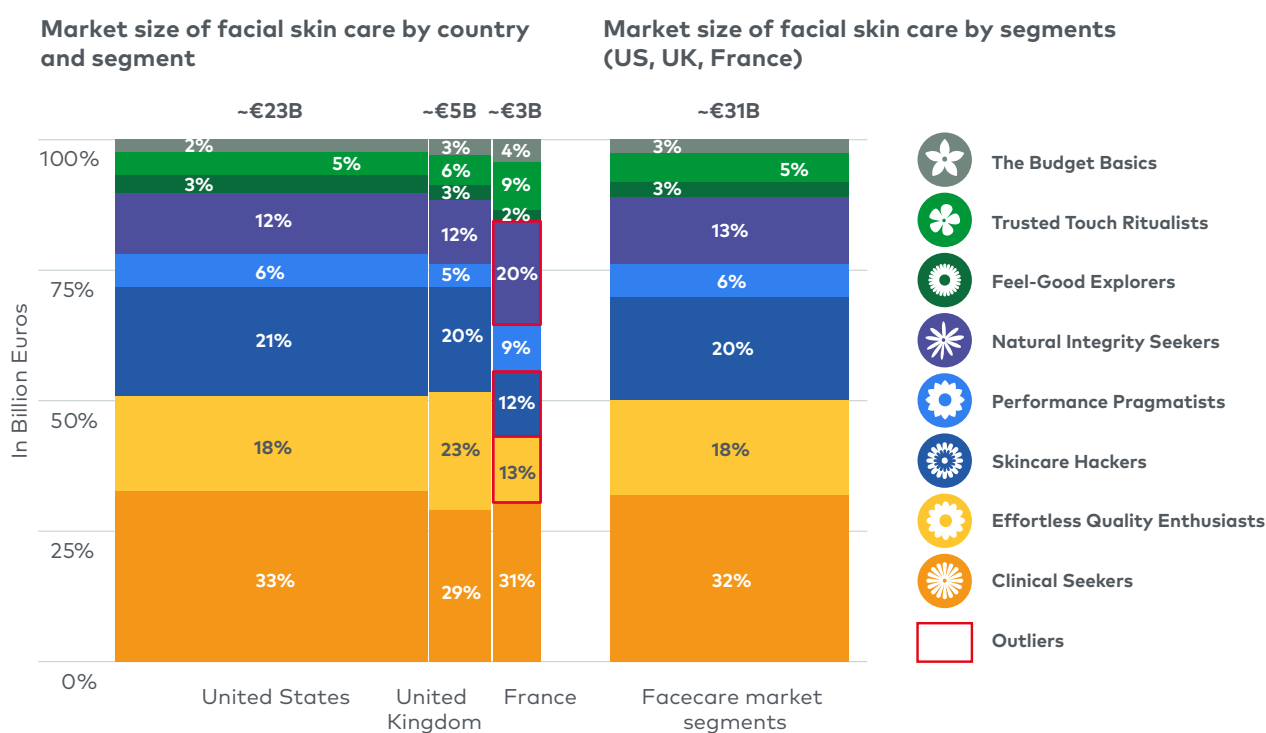
Source: L.E.K. and Potloc survey, L.E.K. research and analysis

Geographic patterns reinforce this:

- In the **US**, Clinical Seekers and Skincare Hackers segments dominate value, reflecting a competitive field marked by digital experimentation and science-led trust.
- In the **UK**, segment dynamics closely mirror the US, with strong presence of Clinical and Pragmatic profiles, and rising traction in hybrid sensorial-functional formats.
- In **France**, Natural and Ritualist segments remain culturally entrenched, though value is shifting toward clean-pharma and pharmacy-endorsed innovation.

Figure 7

Same segments, different weights: Local distribution shapes opportunity



Source: L.E.K. and Potloc survey, L.E.K. research and analysis

What this tells us: growth is not just where consumers are – it's where they're headed, how much they're willing to pay, and how long they'll stay.

4. Segment economics: size, spend, and loyalty












Not all high-spend segments are high-value for brands. Clinical Seekers and Skincare Hackers drive the highest average spend in the category – €350 – 460 and €305 – 400 per year, respectively – but also exhibit some of the lowest brand exclusivity. These consumers build 'best of breed' routines by combining multiple products across brands, often using two to three brands in parallel.

They are digitally savvy, highly informed, and pragmatic in their decision-making. They chase efficacy, not labels, and are quick to abandon brands that fail to deliver – or if a new brand appears to offer a better fit. This behaviour makes them expensive to acquire and challenging to retain, especially in a market flooded with performance-led claims.

By contrast, segments such as Trusted Touch Ritualists or Natural Integrity Seekers may show lower spend per capita – but they demonstrate stronger brand loyalty, with higher exclusive repurchase rates and greater resistance to churn. These segments often prioritise comfort, ritual, or ethical alignment over functional innovation – traits that drive stickiness and support long-term customer lifetime value.

Figure 8

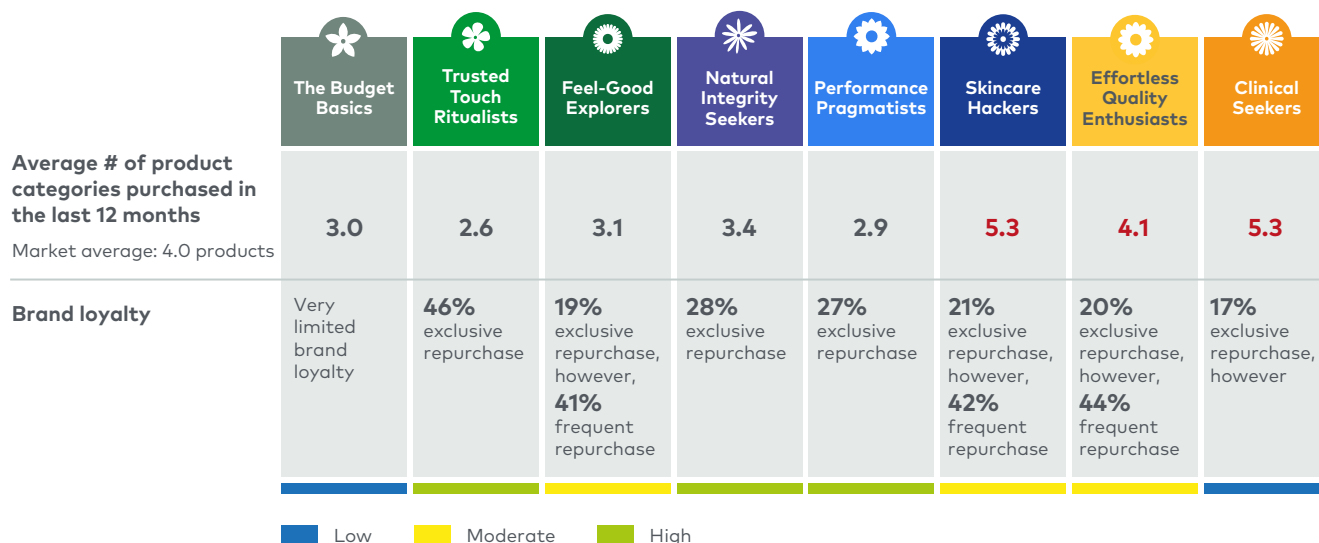
Morning routines are more structured - led by complex multi-step users like Hackers and Clinical Seekers

	 The Budget Basics	 Trusted Touch Ritualists	 Feel-Good Explorers	 Natural Integrity Seekers	 Performance Pragmatists	 Skincare Hackers	 Effortless Quality Enthusiasts	 Clinical Seekers
Share of people following complex 3+ steps routines								
 Market average: 47%	27%	3%	32%	23%	18%	92%	50%	85%
 Market average: 39%	16%	3%	23%	6%	13%	92%	20%	81%
Average # of brands in use in routine								
 Market average: 2.1	1.9	1.5	1.9	1.9	1.8	2.6	2.2	2.6
 Market average: 2.0	1.5	1.1	1.7	1.8	1.6	2.7	2.0	2.7

Source: L.E.K. and Potloc survey, L.E.K. research and analysis

Figure 9

High-product users aren't always loyal - even top spenders like Hackers and Clinical Seekers remain open to switching











Source: L.E.K. and Potloc survey, L.E.K. research and analysis

Understanding this spend-versus-stickiness trade-off is essential. It reframes which segments can be scaled profitably, and which may look attractive on the surface but erode economics over time.

To visualise this dynamic, we analysed segment-level LTV alongside brand fragmentation and capture potential. As shown below, the most attractive segments are not only those with high spend or growth – but those where loyalty concentration, competitive noise, and brand capture potential combine to create advantaged economics.

Figure 10

Beyond size and growth, the best segments offer a winning LTV and lower competitive noise - that's where smart brands should go next

	Market size	Future CAGR	Annual spend	Segment loyalty	Estimated 5 years LTV	Avg. # of brands used	Brand-capture potential*
 Clinical Seekers	€10.0B	3.4%	€350-460	Low-Mid	€850	2.7	€320
 Trusted Touch Ritualists	€1.7B	2.6%	€135-170	Very High	€450	1.5	€310
 Skincare Hackers	€6.2B	3.9%	€305-400	Mid	€802	2.7	€300
 Natural Integrity Seekers	€3.9B	2.9%	€180-200	High	€480	1.9	€250
 Performance Pragmatists	€2.0B	2.8%	€130-150	High	€350	1.7	€200
 Feel-Good Explorers	€1.0B	3.6%	€130-210	Low-Mid	€360	1.9	€200
 Effortless Quality Enthusiasts	€5.7B	3.0%	€220-275	Mid	€350	2.2	€160
 The Budget Basics	€0.8B	1.7%	€115-140	Low	€170	1.8	€70

Note: *5-Years LTV considering the number of brands purchased

Source: L.E.K. and Potloc survey, L.E.K. research and analysis

5. Clinical is not a panacea: rethinking growth pools

Too many brands anchor growth strategy around the Clinical segment, underestimating the saturation and churn. Our data shows that while this group has high intent and spend, loyalty is weak and competition fierce – making acquisition costly and retention fragile.

In contrast, smaller yet growing segments like Trusted Touch Ritualists, Skincare Hackers, or Effortless Quality Enthusiasts combine digital fluency with high receptivity to emerging brands native and often more open to challenger brands. These offer white-space potential for innovation and targeted go-to-market strategies.

This reinforces a broader caution: stretching a brand to reach Clinical Seekers may not always be worth the trade-offs. In a crowded clinical field, brands risk diluting their identity and overcommitting to a segment that demands continuous performance upgrades to maintain share. For many players, targeting less saturated segments with more defensible value drivers – such as sensorial loyalty or ethical trust – may yield stronger, more sustainable economics. If your brand is anchored in emotional connection with consumers, this is especially true: emotional resonance drives loyalty, and stretching too far risks breaking that bond.



Several segments - while smaller - present more favourable economics for brand building. Their loyalty, focus, and lower competitive noise give brands a stronger foundation for profitable growth.

Trusted touch ritualists



- Highest loyalty in the category
- Use fewer brands and value routine stability
- Emotional, sensorial brand connection

These seasoned shoppers value comfort, trust, and sensorial satisfaction. Skincare is a moment of wellbeing, not experimentation. They're deeply loyal to brands they know and prefer rich textures that feel good. Offline-first, emotionally grounded, and skeptical of online buzz - they keep things personal and familiar

Key insights

- **Awareness & Discovery:** Predominantly guided by friends/family (77%) and pharmacists (36%); very low social media (13%) and influencer (2%) exposure
- **Motivations:** They seek emotional wellbeing - top drivers include brand trust (38%) and wellness (32%). Effectiveness is important (42%) but not dominant
- **Shopping Behavior:** Shop primarily in-store (69%), especially in pharmacies and supermarkets. Only 1.9 channels used on average (lowest of all segments)
- **Routine & Use:** Maintain extremely simple routines - 1.3 steps and 2.6 product categories/year. Use just 1.5 brands on average
- **Spend & Loyalty:** Mid-spend range (€135 – 170/year), but 46% are exclusive repurchasers - the highest exclusivity across segments
- **Emotional Role:** Skincare is not about transformation, but reassurance. Texture is central - 70% cite sensorial feel as key (vs. 55% avg)

Source: L.E.K. and Potloc survey, L.E.K. research and analysis



Key success factors and learnings

- Design for sensory reassurance
- Celebrate brand familiarity and routine
- Activate pharmacy & in-store visibility
- Emphasize texture and wellness, not performance
- Avoid digital-heavy campaigns
- Drive loyalty through low-risk innovation

Natural integrity seekers



- Values-based decision making
- Low brand-switching behaviour
- High emotional and ethical resonance

Thoughtful and discerning, these consumers choose brands that align with their values. Clean, safe, and natural ingredients are non-negotiables. They listen to pharmacists and experts, not TikTok. While they won't shout about it, they are quietly loyal and guided by ethics, safety, and authenticity in every purchase

Key insights

- **Awareness & Discovery:** Prioritize medical voices - 65% rely on dermatologists, 50% on pharmacists. Very low reliance on social media (16%) and influencers (3%)
- **Motivations:** Over-index on ethical and safety needs - "use less toxins" (35%) and "use natural products" (26%) rank far higher than average
- **Shopping Behavior:** 65% shop in-store (vs. 61% avg), primarily in pharmacies and supermarkets. Use 2.4 channels - slightly below market average
- **Routine & Use:** Moderate routine complexity with 2.0 steps on average and ~3.4 product categories/year. Strong focus on hygiene and safety-driven care
- **Spend & Loyalty:** Spend slightly below average (€180 – 200/year), but 70% repurchase consistently. Loyalty is earned through alignment, not impulse
- **Emotional Role:** Skincare must feel safe, right, and aligned. They don't seek transformation - they seek consistency, responsibility, and trust

Source: L.E.K. and Potloc survey, L.E.K. research and analysis



Key success factors and learnings

- Lead with ingredient and safety credentials
- Position around personal safety and alignment
- Prioritize professional endorsements and data
- Downplay trendiness and emotional drama
- Activate through pharmacy & staff-led education
- Offer ethically-minded value

Effortless quality enthusiasts



- Balance of pleasure and functionality
- Mid-level loyalty, but high satisfaction when matched
- Prefer simplicity and reliability

This group seeks the sweet spot: high-quality skincare that works and feels good - without over-investing. They're informed, selective, and motivated by both texture and results. Confident in their judgment, they shop omnichannel and build balanced routines that elevate without overwhelming

Key insights

- **Awareness & Discovery:** 61% influenced by online reviews, 38% by social media. Still consult dermatologists (33%) and pharmacists (26%) - a hybrid research profile
- **Motivations:** They over-index on both texture (63%) and effectiveness (84%) - one of the only segments where these are equally critical
- **Shopping Behavior:** 2.6 channels used on average; 43% shop online. Omnichannel by nature, with strong presence in Amazon and pharmacies alike
- **Routine & Use:** Structured approach of 2.4 steps per day, ~4.1 product categories/year. Balanced use of cleansers, moisturizers, serums, sunscreens
- **Spend & Loyalty:** Good spenders (€220 – 275/year); moderate loyalty with 63% repurchase, but only 19% do so exclusively
- **Emotional Role:** Skincare is both comfort and quality. They want to enjoy their routine, but they expect it to work - no fluff, no fuss

Source: L.E.K. and Potloc survey, L.E.K. research and analysis



Key success factors and learnings

- Deliver on both sides: feel + function
- Be proof-driven but not clinical
- Curate routines that feel complete without overwhelming
- Leverage hybrid discovery
- Appeal to the emotionally rational shopper
- Offer mid-premium pricing with noticeable gains

These segments may not shout the loudest - but they stay the longest.

6. Portfolio strategy: matching brands to segments








Portfolio owners can use this segmentation to minimise cannibalisation and maximise stretch-fit. Our analysis maps brand propositions against each segment to identify gaps, overextensions, and unnatural fits.





The strategic imperative is to assign "hero segments" per brand, while ensuring portfolio coverage across high-growth zones. M&A can plug specific white-spaces – e.g., acquiring algorithm-based diagnostics for Skincare Hackers or sensorial-first naturals for Trusted Touch users.

Figure 11

A Portfolio Mapping Exercise to Identify Gaps and Overlaps

Brand over index ratio* by segment

	Market Weight	Brand 1	Brand 2	Brand 3	Brand 4
 The Budget Basics	6%	1.1	1.5	0.7	1.4
 Trusted Touch Ritualists	11%	0.2	1.0	1.3	1.8
 Feel-Good Explorers	5%	0.8	0.8	1.6	1.7
 Natural Integrity Seekers	18%	0.3	0.5	0.7	1.5
 Performance Pragmatists	11%	0.4	0.3	0.6	1.8
 Skincare Hackers	13%	1.0	1.6	1.1	0.7
 Effortless Quality Enthusiasts	18%	1.2	0.9	1.1	0.9
 Clinical Seekers	19%	1.5	1.0	1.0	0.6

Low     High

Note: *[Share of segment X in the customer pool of a given brand] / [(Share of the segment in respondents) * (Average number of brand consumed per segment)]

A value >1 means the brand is overexposed to a segment, a value =1 means the share of the segment in the brand is in line with the market, a value <1 means the brand is underexposed to a segment

Source: L.E.K. and Potloc survey, L.E.K. research and analysis

7. Stakeholder action & how L.E.K can help

This report does not prescribe one-size-fits-all solutions. Instead, it offers a strategic lens through which investors and operators can rethink growth potential, risk exposure, and portfolio focus. Segmentation is not just a diagnostic tool – it reframes the right questions to ask, depending on your role and ambition in the category.



Brand segmentation diagnosis

Client question

- Which consumer segments do we currently serve?
- Are we over-reliant on a niche, or broadly positioned?

What we do

- Deploy L.E.K. segmentation survey (off-the-shelf or lightly customized)
- Analyze brand's exposure to each behavioral segment
- Map brand vs. competitive set

Outcome

- Clear view of brand's core segment and near adjacencies
- Foundation for internal alignment (or external storytelling)



Growth strategy roadmap

Client question

- Where should we focus for next-stage growth?
- How do we evolve product, channel, media, pricing?

What we do

- Start from brand diagnosis
- Identify high-potential adjacent segments
- Build growth scenarios (e.g., product stretch, pricing tiers, media mix, innovation priorities)

Outcome

- Growth action plan aligned to behavioral demand
- Strategic roadmap across marketing, innovation, channel



International growth strategy

Client question

- How should we adapt our positioning and portfolio in new markets?
- Which countries hold the biggest upside for our brand/segments?

What we do

- Analyze local segment distribution vs. home market
- Assess local market fit & readiness
- Recommend adaptation levers (claims, format, pricing, channels)

Outcome

- Market entry or expansion strategy tailored by segment insights
- Local relevance with global consistency



Brand portfolio gap & optimization analysis

Client question

- Which segments are we not addressing with our brand portfolio?
- Are we cannibalizing ourselves across brands?

What we do

- Run all owned brands through segmentation analysis
- Identify overlapping or missing segment coverage
- Recommend brand roles and white space opportunities

Outcome

- Portfolio clarity: roles, overlaps, and growth gaps
- Brand rationalization or innovation areas surfaced



M&A opportunity qualification

Client question

- Which acquisition targets align with unmet demand segments?
- Is this target meaningfully differentiated?

What we do

- Add targets into segmentation framework
- Run segmentation
- Analyze target's segment fit

Outcome

- Data-backed M&A prioritization
- Stronger due diligence narrative and faster go/no-go

A Global Health and Beauty team – Key points of contact



- Americas
- Europe
- APAC/Middle East

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About Potloc

Potloc is the all-in survey platform designed for leading consulting and private equity firms to understand market shifts and drive high-speed, high-stakes decisions. With unrivaled data quality mechanisms, AI-powered analysis tools, and end-to-end support from market research experts, Potloc simplifies everything from survey creation to analysis. With hubs in New York, Paris, and Montreal, Potloc has supported 500+ global firms in collecting insights from B2C and B2B respondents across industries and geographies.

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