



WELL-AGEING : PANORAMA AND CHALLENGES OF BEAUTY AFTER 55 YEARS OLD

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- **25** years of expertise in consumer and sensory testing for cosmetics and hygiene products.
- **40 000** panelists in France (including 70% of women), **6 000** in Singapore and **2 million** worldwide with our network of 20 field partners.
- **Documented databases** dedicated to the needs of beauty specialists: age, ethnicity, phototype, skin characteristics, concerns, habits and behaviors.
- **More than 200 consumer studies/home-use-tests** carried out in 2022 on cosmetics and hygiene products.
- More than **3 500 panelists in Paris** available to carry out centrally located tests and participate in our thematic workshops: cares, routines, make-up, treatments, food supplements, injections,...



OBSERVATIONS AND OBJECTIVES



- Our goal has always been to **better understand** the expectations and behaviors of the **consumers** in order to support our clients with the development of their products.
- In 2023, **36% of women** in France are above 55 years old and this number will only **increase in the future** with longer life expectancy.*
- Our panel hosts 10 000 women over 55 who have been testing cosmetics with us for many years and it was important for us to put them in the spotlight.
- This is why we decided to carry out a large study in order to better understand their **cosmetic habits**, **lifestyle**, their **relationship to beauty** and their **expectations** with regards to cosmetic products.

*Source: INSEE



OUR METHODOLOGY

Double approach

QUANTITATIVE METHOD – SURVEY

- Online survey on more than 3 500 women from 55 to 84 years old.
- 70 Closed and open questions about women's characteristics, beauty routine, their opinion on their skin and face, their lifestyle and their well-being.
- Conducted in France & Singapore.



QUALITATIVE METHOD – THEMATIC WORKSHOPS

- 6 thematic workshops with groups of 6 women.
- Discussions to understand in depth the expectations of women, their relationship to beauty and what they expect from cosmetic products and their manufacturers.
- Conducted in France & Singapore.



The women really appreciated being able to share their feelings and express themselves regarding their relationship to beauty.

IN FRANCE

SOME CHARACTERISTICS

86%

Declare knowing their skin well

But 52% have never had a diagnosis to define the characteristics of their skin

54%

Have very dry to normal-dry face skin

23% have combination skin, 14% normal skin and 9% normal-oily to oily skin

49%

Have sensitive face skin

According to ARPP rules

54%

Say they have poorly or never protected themselves from the sun

47% have never smoked and 35% no longer smoke

20%

Have already undergone an aesthetic dermatology treatment

Nearly 30% want to do it in the future

79%

Have never taken hormone treatment for menopause

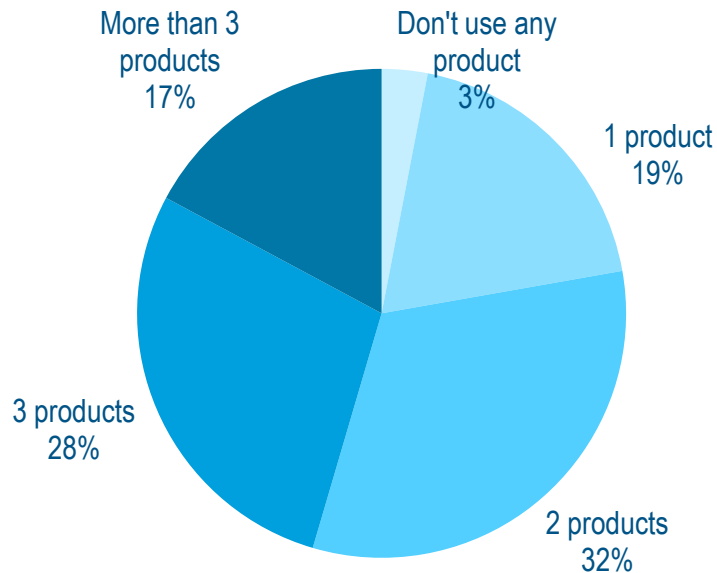
But 25% felt a change in their skin from menopause

33% of them still have a full-time professional activity

THEIR BEAUTY ROUTINE

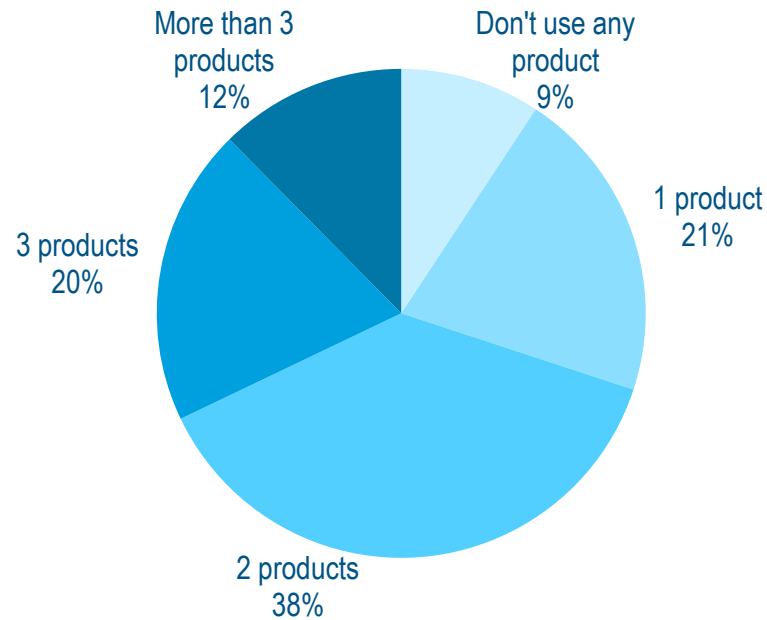
Morning routine

Number of products used every morning (including cleansers, lotions, serums, cares...)



Evening routine

Number of products used every evening (including cleansers, make-up removers, lotions, serums, cares...)



*Around 60% of women use 2 or 3 products in their morning and evening routine.
Around 20% of them only use 1 product.*

THEIR BEAUTY ROUTINE

68%

Use a face cleanser in the morning

91% of them use a cleanser or make-up remover in the evening

69%

Use an anti-ageing care

43% declare using a face care containing hyaluronic acid and 23% declare using a care containing vitamin A

55%

Use a hydrating care

50% use it in the morning and 25% use it the evening

44%

Use a serum

52% use an eye care.
12% use a face oil

12%

Declare using a care containing SPF in the morning

19% of the women do not use any face care in the evening

29%

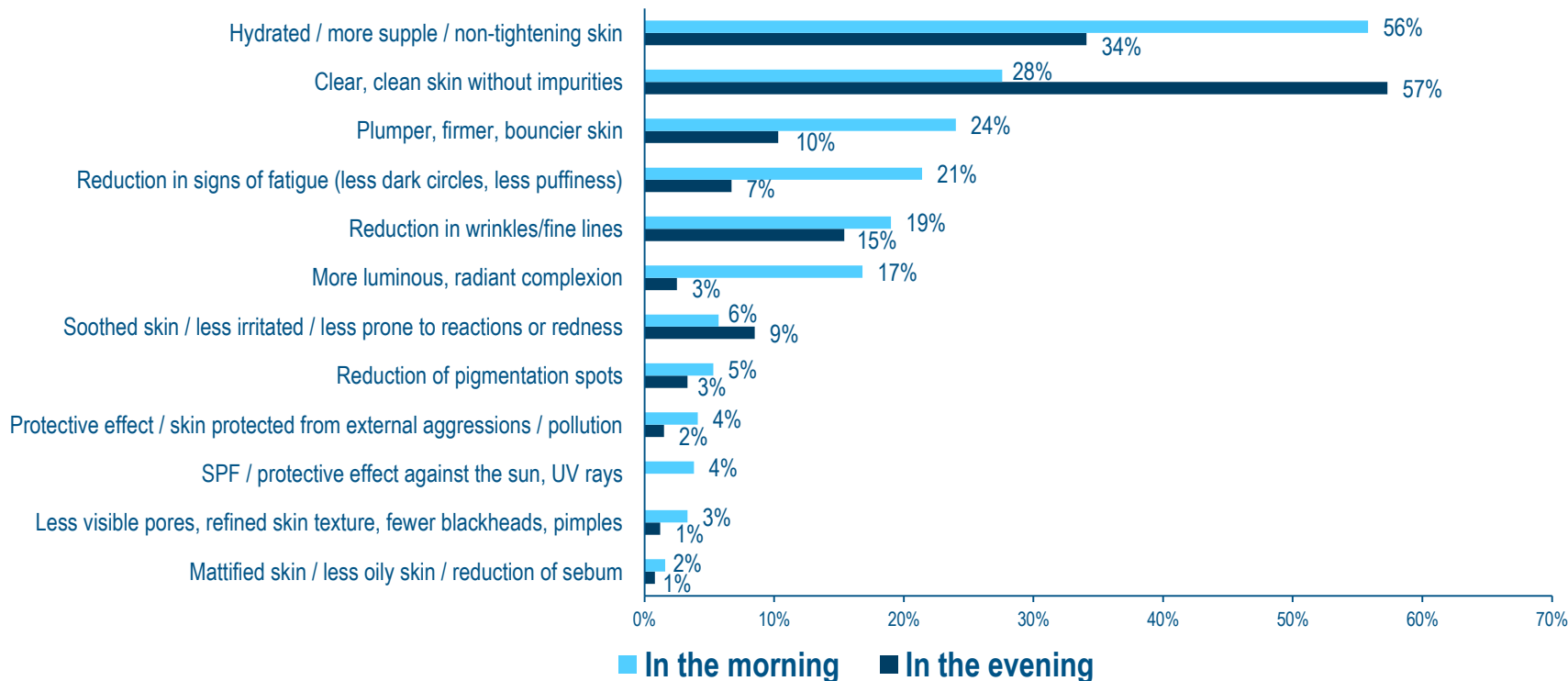
Do cures of capsules/gummies food supplements

8% use some ampoules in cure

If they had to name one product they absolutely couldn't do without, it would be their hydrating face care at 33%

THEIR BEAUTY ROUTINE

What is the most important to you in the morning / in the evening?



THEIR BEAUTY ROUTINE

Most quoted brands

Brands	Number	%
Clarins	330	10,70%
L'Oréal	253	8,20%
Nivea	172	5,60%
Yves Rocher	167	5,40%
Diadermine	143	4,60%
Filorga	97	3,20%
La Roche Posay	95	3,10%
Avene	91	3,00%
Nuxe	90	2,90%
Dr Pierre Ricaud	74	2,40%



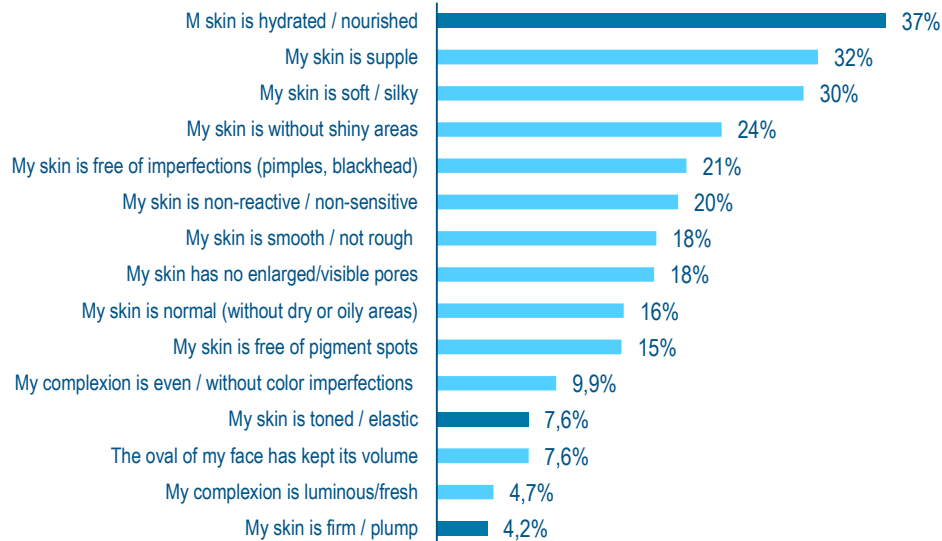
The product that they quoted the most is **Double Sérum** from Clarins.



QUALITIES AND DEFECTS OF SKIN

According to them, the three main qualities that the skin of the face must have (in general) are:
a **hydrated / nourished skin** (30%), an **elastic / toned skin** (25%) and a **firm /plumped skin** (12%).

When you look at the skin on your face today, what are its three main qualities?



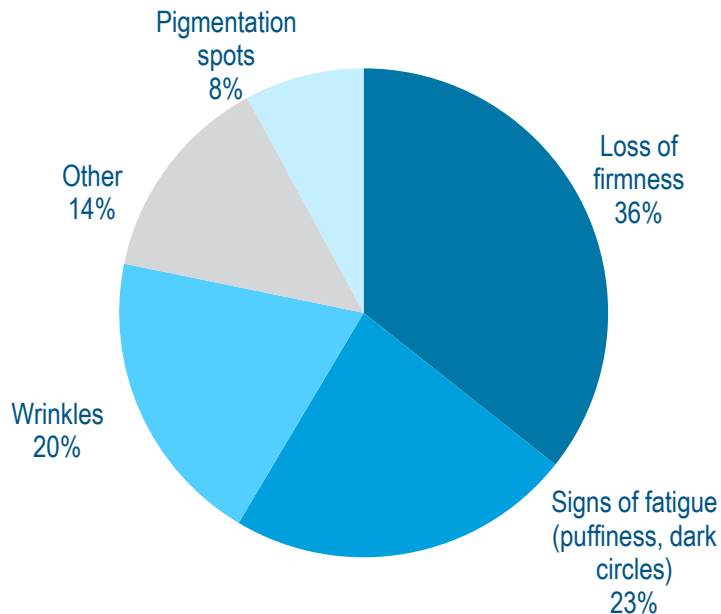
When you look at the skin on your face today, what are its three main defects?



The women are globally satisfied by the hydration of their skin but the biggest defect of their skin remains the loss of firmness and of volume of the oval of their face.

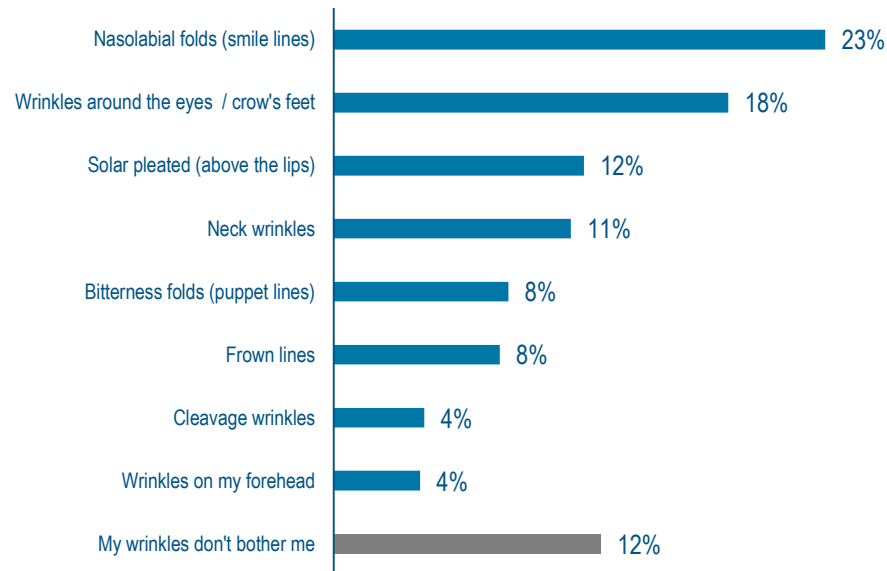
WHAT BOTHERS THEM THE MOST

Can you tell us what bothers you the most when looking at the skin on your face?



What bothers women the most is the lack of firmness of their skin, followed by signs of fatigue and wrinkles.

What is the area where skin ageing bothers you the most?

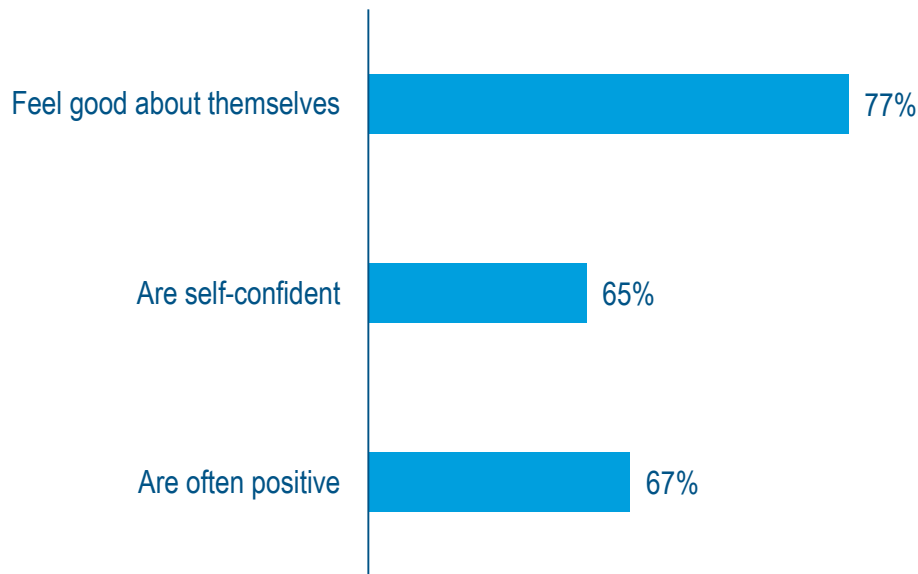


Women are particularly bothered by their nasolabial folds, followed by their wrinkles around the eyes.

WELL-BEING AND SELF-ACCEPTANCE



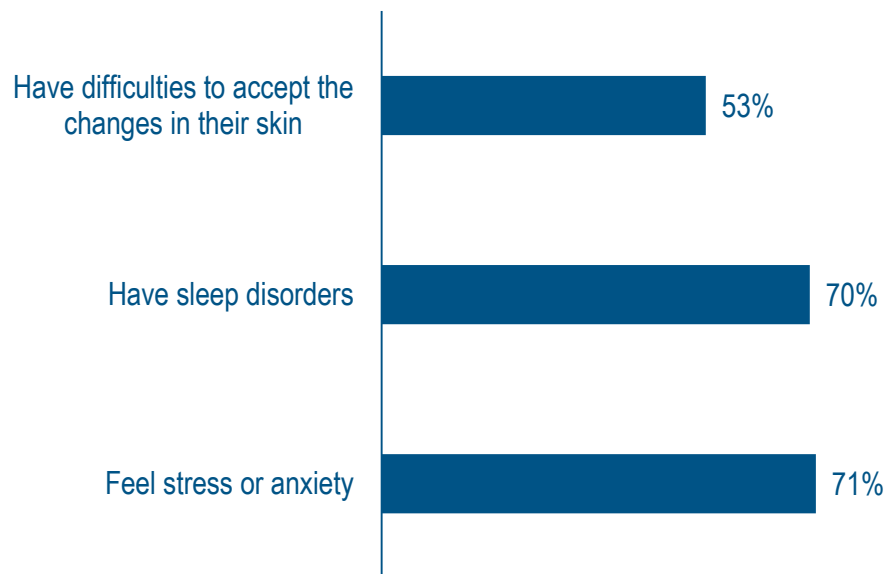
A majority of positive feelings and fulfillment



These positive feelings increase with age.



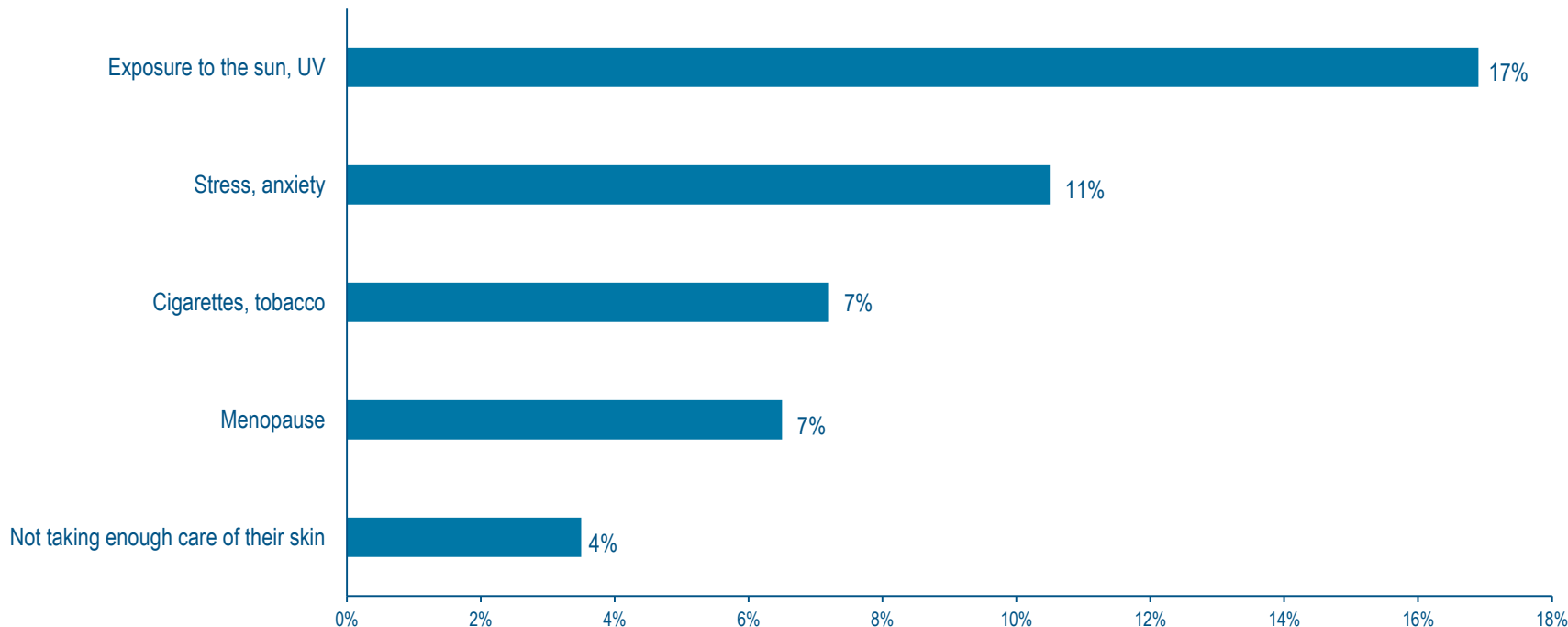
Difficulty accepting the changes in their skin and a tendency to stress and lack of sleep which could have an impact on their skin



These negative aspects decrease with age.

THE FACTORS OF AGING

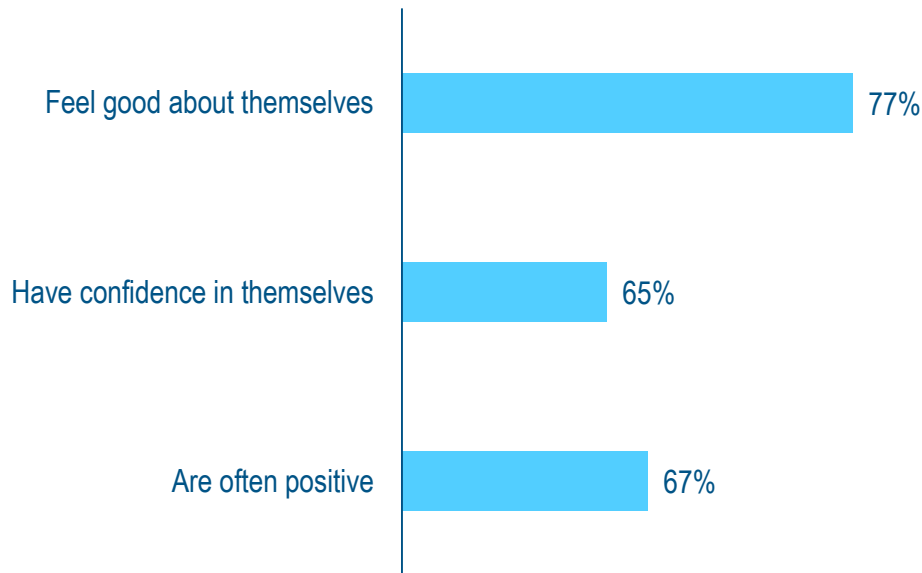
In all honesty, what do you think had had the most impact on the aging of your facial skin?



WELL-BEING AND SELF-ACCEPTANCE



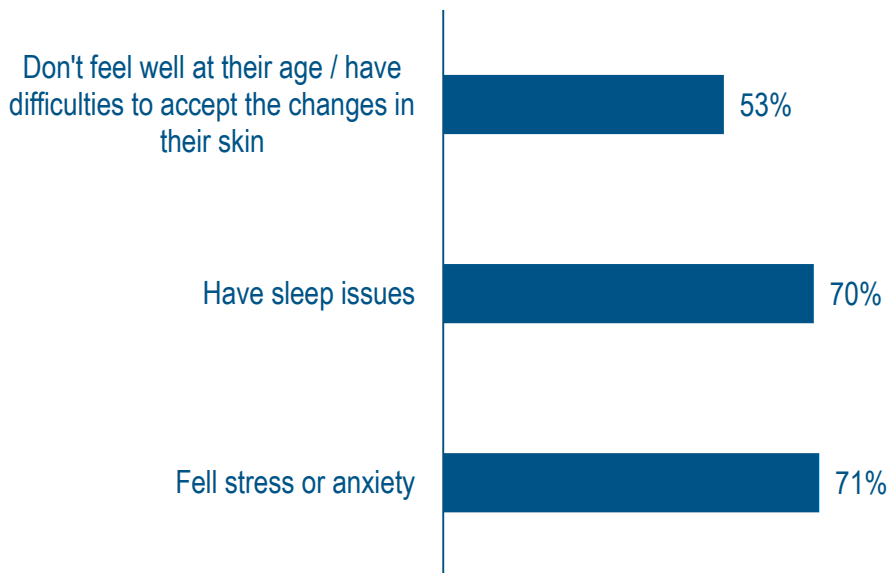
A majority of positive feelings and fulfillment



These positive feelings increase with age.



Difficulty accepting their age and a tendency to stress and lack of sleep which could have an impact on their skin



These negative aspects decrease with age.

THEIR DEFINITION OF BEAUTY



- The notions that largely come out on top (at 62%) are well-being and self-acceptance.
 - ✓ “Feeling good about yourself despite the years / Feeling good “from inside””
 - ✓ “Accept yourself as you are / Accept change / Accept your age”
 - ✓ “Being fulfilled / Being happy / Smiling”
- However, their appearance and taking care of themselves is still very important (46%), and particularly through luminosity, radiance of the skin.
 - ✓ “Continue to take care of yourself / Taking care of your skin / Having a beautiful skin”
 - ✓ Having luminous, glowing, radiant skin / Luminous, clear complexion / Luminous face”
- Staying natural is a notion that is also often quoted.
 - ✓ “Stay as nature defined us / Natural without artifice / To feel natural, light”
- For them, the flaws of beauty remain mostly: excess surgery and excess makeup.

“The beauty of a face is expressed by its luminosity, its harmonious colors and freshness. It is the reflection of the soul.”

“Beauty comes from within and is seen on the outside. It is an emotion that passes; it is at the same time the radiance, the charm and the harmony released by a face.”

“Having an expressive face and keep smiling without worrying about the passing years.”

“Health, dynamism, expressive eyes, being at ease, feeling good about yourself, communicating and having originality.”

THE CHALLENGES



- Women over 55 years old remain predominantly **positive, serene** and **feel good about themselves**.
- But they are particularly bothered by the **lack of firmness** of their skin and the **loss of volume**. Their dream would be to find products that could be really **effective on these aspects**.
- They definitely want to continue taking care of their skin with **cosmetic products** however, 70% complain about **lies or broken promises** regarding **efficacy on marks of ageing**.
- They try to hide the signs of ageing with a **healthier lifestyle** and by taking better care of themselves (hydrating, healthy food, no tobacco, physical activity).

"Stop lying to us. I would love for 60-year-old women to always be taken as a role model for praising anti-aging creams."


"All the big brands keep their promises on hydration, but when it comes to wrinkles I'm skeptical."

"I'm always skeptical of the promises made by manufacturers but that doesn't stop me from continuing to buy them and believe in them anyway."



THE CHALLENGES

- They are convinced that beauty will come from within because it seems unlikely to them that they will be able to really erase the marks of time (other than by injections).
- Therefore, they are very interested in nutricosmetics which seem to them to be an efficient and less expensive compromise.
Besides, 30% of them already practice food supplements/gummies cures.
- The well-ageing trend is much less known in France than in Asia but perfectly fits what women are looking for, namely products that extend the beauty of their skin in a natural way while taking care of them inside and out.



"I'm looking for healthy products to take orally that regenerate from within."

"I expect a lot of progress on food supplements that would allow me to age better."

"My miracle product is a cream associated with capsules because the cream does not act in depth. A molecule that would approach hyaluronic acid to tighten and firm."

"I'm waiting for a natural product, which would bring me comfort; which would redensify and plump up my skin."

IN-DEPTH ANALYSIS

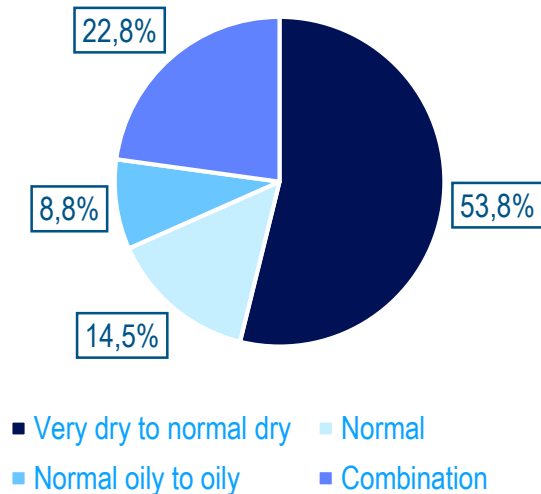
IN FRANCE

ACCORDING TO THE WOMEN'S CHARACTERISTICS

TYPE OF SKIN

Beauty routine

- Four classes:



- During their beauty routine, women with combination skin use more skincare products (74,4%), there are more likely to cleanse their face with a rinse off-product and to do face masks (64,2%) and peeling (62,3%) compared to other skin types.
- Women with normal skin tend to use more frequently an anti-age care (39,0%).

The majority of women over 55 years old have very dry to normal dry skin.

TYPE OF SKIN

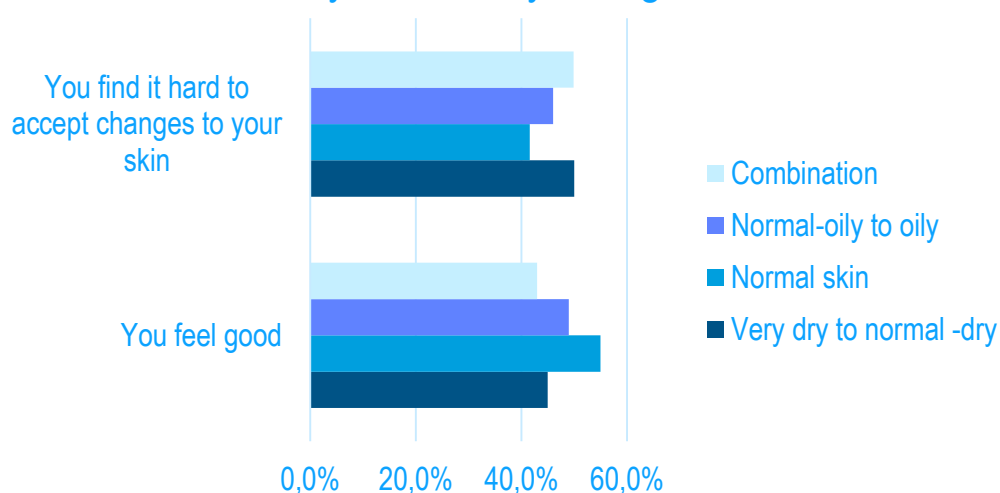
Well-being with their age

- Depending on their skin types, women have more or less difficulty accepting changes to their skin. Actually, the skin types evolve differently.
- Women with dry skin tend more to not accept the changes of their skin compared to women with normal skin.
- Women with combination skin are more likely to say that the principal flaw of their face is the lack of firmness while women with normal to normal-oily skin say that it's the signs of tiredness.

38,9%

24,4%

How do you feel at your age ?



PHOTOTYPES

For the majority of questions, there were no significant differences between phototypes. Actually, it seems that the phototypes do not influence the beauty routine or the well-being of the women with their age.

- The differences that we can observe concern what bothers them the most on their face and their most bothering ageing zone.

For phototypes from I to III, 22,0% of the women declare that it's their signs of tiredness that bother them the most and 20,3% quote their wrinkles.

They are 23,3% quoting that its their naso-labials folds that appear more wrinkled.

For phototypes from IV to VI, 32,1% of the women declare that it's their signs of tiredness that bother them the most and only 13,2% quote their wrinkles.

They are 20,0% saying that they are not bothered by wrinkles.

Women with phototypes IV to VI are less bothered by wrinkles than other women but more by signs of tiredness compared to lighter phototypes.

Beauty routine

Differences between women from 50 to 60 years old and women from 61 to 84 years old :

- ✓ After 60 years old, women tend to use fewer face care products. They favor a more simple beauty routine with more not rinsed-off products and 2-in-1 products.
- ✓ They make less food supplement cures and less masks or peelings.

As they get older, women want to get straight to the point with specific products instead of several time-wasting products.

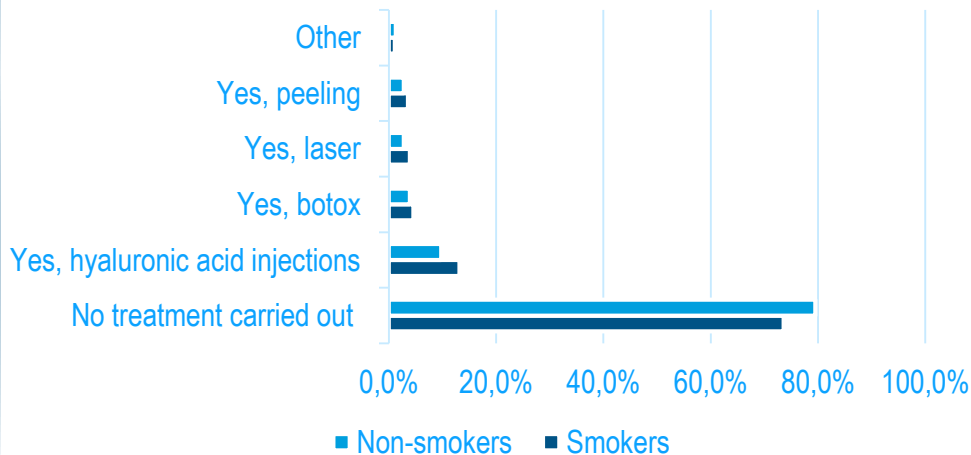


We also tried to highlight the differences between the beauty routine of menopausal women, pre-menopausal ones and those who are not, but the results were not significant.

SMOKING HABITS

- ✓ It appears that women who smoke or have smoked in their life, have a less firm skin than women who have never smoked. Indeed, **37,7%** of the smokers complain of a loss of firmness while only **33,6%** of non-smokers complain about it.
- ✓ This could explain why smokers have more difficulties to feel completely comfortable with their age and accept changes of their skin.
- ✓ Consequently, smokers tend to do more cosmetic dermatology or intend to do so than non-smokers.

Have you ever had cosmetic dermatology treatments?



We do not observe any significant difference between the beauty routines of smokers and non-smokers.

Smoking has more negative impacts on skin aging which are irreversible.

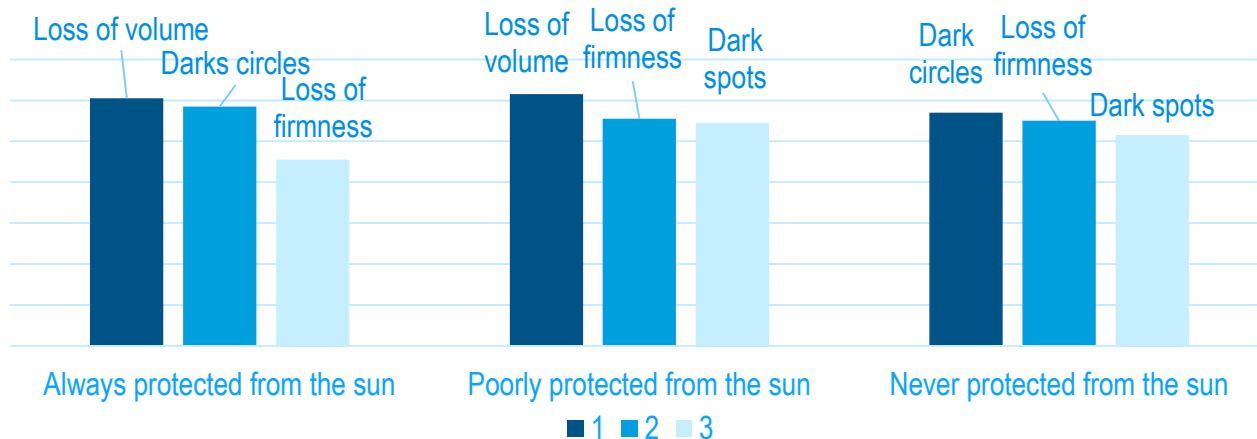
SUN EXPOSURE

Skin quality

- ✓ In recent years, we've become increasingly aware of the major impact of the sun on our skin. Protecting our skin from the sun has become an essential part of our beauty routine.

In fact, women who have always protected themselves from the sun have a **more hydrated skin** (14,8% vs 12,6% of the women who don't protected their skin from the sun) with **fewer dark spots**.

Top 3 main defects of their skin



- ✓ Women who always have protected themselves from the sun tend to use more skincare products than women who don't protect themselves. They are more likely to take care of their skin.

For instance,

In the morning, only 16,8% of the women who don't protect their skin from the sun use a product before their cream or serum against 31,2% for those who protect their skin from the sun.

In the evening, 18,6% of the women who don't protect their skin from the sun don't clean their face.

It seems there are still women who are not aware of the effects of the sun on skin or health. There is a need to develop more products containing SPF and more communicating about this.



CITY/COUNTRY

Finally, we wanted to compare the answers of women who live in a city and those who live in countryside.

✓ We've noticed that women who live in countryside :

- Use less skincare products in the evening and in the morning,
- Do less masks, peelings or institute treatments,
- Carry out less cosmetic dermatology treatments.

Moreover, these women say that they are less comfortable with their own skin and have less self-confidence.



We did not observe other significant differences between women living in cities and those living in countryside.

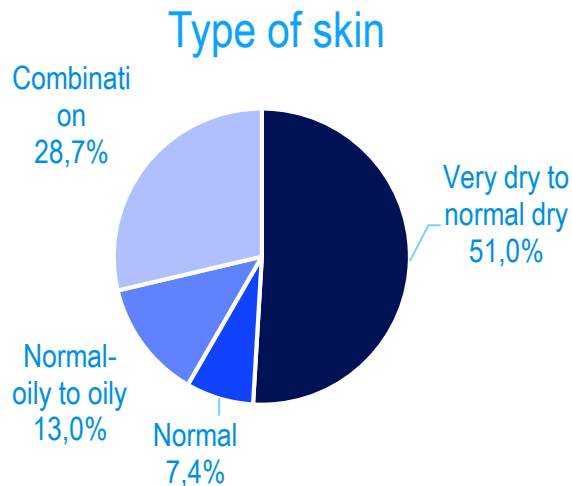
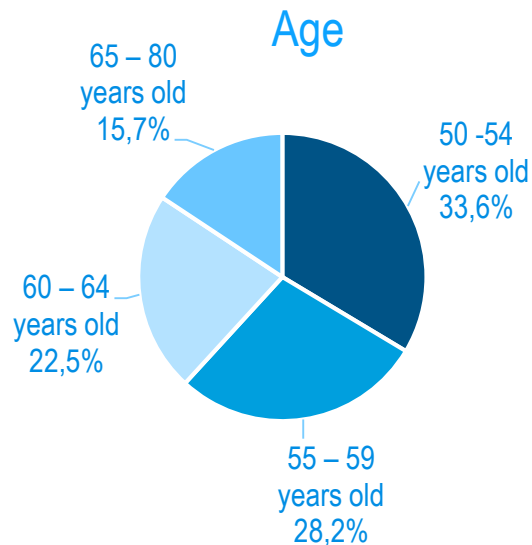
IN SINGAPORE

COMPARISON WITH FRANCE

IN SINGAPORE

QUANTITATIVE METHOD – SURVEY

Some characteristics



31,9%

Of sensitive skin

Vs 48,9% of panelists
in France

95,8%

Never smoked

Vs 47,2% of
panelists in France

67,1%

Protected themselves from
sun/UV

Vs 46,6% of panelists in
France

Comparison with France: Main differences

Relationship with their skin today :

- More women declare having smooth skin (37,7% > 18,2%) and dark spots (56,1% > 28,5%).
- They also feel good at their age in majority (71,8% < 77,0%).
- They are more bothered by their loss of firmness and their dark spots, especially around the eyes.

Beauty routine :

- Singaporean women tend to use more rinsed products (94,1% > 42,1%) and they use more pre-care products than in France (63,0% > 28,0%).

Cosmetics habits :

- More women in Singapore have already had aesthetic dermatology treatments than in France (26,7% > 18,5%).

Well-being and healthy living:

- Fewer women in Singapore have stress and anxiety (55,9% < 71,1%), and more of them have self-confidence (81,9% > 64,7%).
- In France, for improving their health, the majority want to lose weight (57,0%) while in Singapore they want to do more exercises (60,0%).

IN SINGAPORE

QUANTITATIVE METHOD – SURVEY

Comparison with France: Main differences

Beauty routine :

Most quoted brands

Brands	Number	%
Estée Lauder	15	5,8%
KhieI's	14	5,4%
Clarins	13	5,0%
Laneige	11	4,2%
SK-II	9	3,5%
Inisfree	8	3,1%
Neutrogena	8	3,1%
Lancôme	7	2,7%
L'oréal	7	2,7%
Sulwhasoo	6	2,3%

The product that they quoted the most is Advanced Night Repair from Estée Lauder.



If they had to name one product they absolutely couldn't do without, it would be their hydrating face care at 32,3%

Comparison with France

During the focus groups in France and Singapore, we asked women several questions about their relation with their skin. Here are the main differences that emerged :

- ✓ We asked women what beauty mean to them. In France, they say that beauty is the luminosity/ the radiance of the skin and when the skin is firm while in Singapore, they quote a clear skin.
- ✓ About the changes of their skin, in France, they say that they noticed a dehydration of their skin and they feel this change when they are looking at old photos. In Singapore, since their 50 years old, they have mostly noticed sagging, eye bags and fines lines.
- ✓ In France, women declare that they feel beautiful when they wear makeup while in Singapore they feel beautiful without makeup, with a natural look.
- ✓ When they talked about what had the most important impact on their skin, they all quote the sun exposure without protection and in France they quote the tobacco.
- ✓ For them, the flaws of beauty is for women in France, an excess of esthetic dermatology and for women in Singapore a bad face care routine.

In France and in Singapore, they mostly recommend to younger women to take care of their skin and wear sunscreen.

Comparison with France

During these thematic workshops, we also asked the women questions about the qualities and flaws of their skin and we asked them to give each other a quality of their skin.

- When we compare the quality given by the rest of the group with the flaws that they give for themselves, they quote the opposite.

Women	Quality of their skin (given by the group)	Flaws of their skin (according to them)
1	Plump skin/ Smooth / Nice	Sagging/ Pigmentation
3	Very few wrinkles/ Smooth / Nice	Lines / Eyes bags
4	Soft /Clear / Not dry/ Almost no wrinkles	Nasolabial lines / Enlarged pores
6	No pigmentation/ Firm skin	Dry spots/ Pigmentation
7	Smooth / Less wrinkles/ Even skin	Eyes bags/ Smiles lines
9	Firm/ Smooth/ Less pigmentation	Visible pores / Pigmentation
11	Smooth complexion/No pigmentation/ Even skin/ Fine texture	Uneven skin tone/ Dryness

There is a difference of perception, here is an example for Singapore, but we observe the same tendency in France.



**THANK YOU FOR YOUR
ATTENTION!**

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IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT:

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