



SPATE

MAY 2022

FRENCH SKINCARE TRENDS REPORT



SPATE IN FRANCE. OUI OUI!

Spate continues to expand on the global consumer perspective with the launch of French data, sharing insights to support marketing launches, product development, and more. With knowledge of consumers near and far, brands can serve a broader market, meeting their customers where they're at, whether in terms of favorite skincare ingredients or their most stubborn concerns.

Explore this report to see top skincare trends across France and the United States. First, understand which trends are unique to each market and which ones cross markets and make an international impact. Then, from top ingredients to favorite brands, take a deep dive to explore other trends making waves to support your audience's needs, locally and abroad.

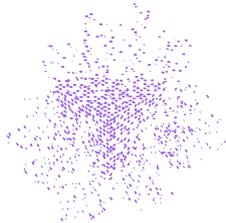
Interested in exploring more trends? [Start your free trial today.](#)

Thank you,

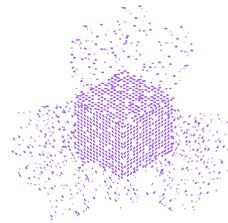
Olivier and Yarden, co-founders of Spate

METHODOLOGY

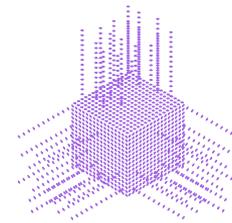
At Spate, we analyze over 20 billion search signals to identify which beauty products are most top of mind for consumers. **Why search data?** Every time a user types a query into the search bar, they are sharing what is top of mind for them — often including concerns, questions, and context they might not share elsewhere. Spate captures billions of queries that project an unbiased lens on *real* consumer behaviors and needs.



+20B beauty related
search signals in the US



Unsupervised machine
learning to identify clusters



Trends classification for
insights and implications

SKINCARE PRODUCT OVERVIEW

Comparing skincare product searches in March for the past three years, there's notable and consistent growth in the US.

However, **skincare product searches in France are on the decline at the start of the year, indicating a different beauty focus for the French consumer.**

Source: US Google Search March 2020 vs. 2021 vs. 2022



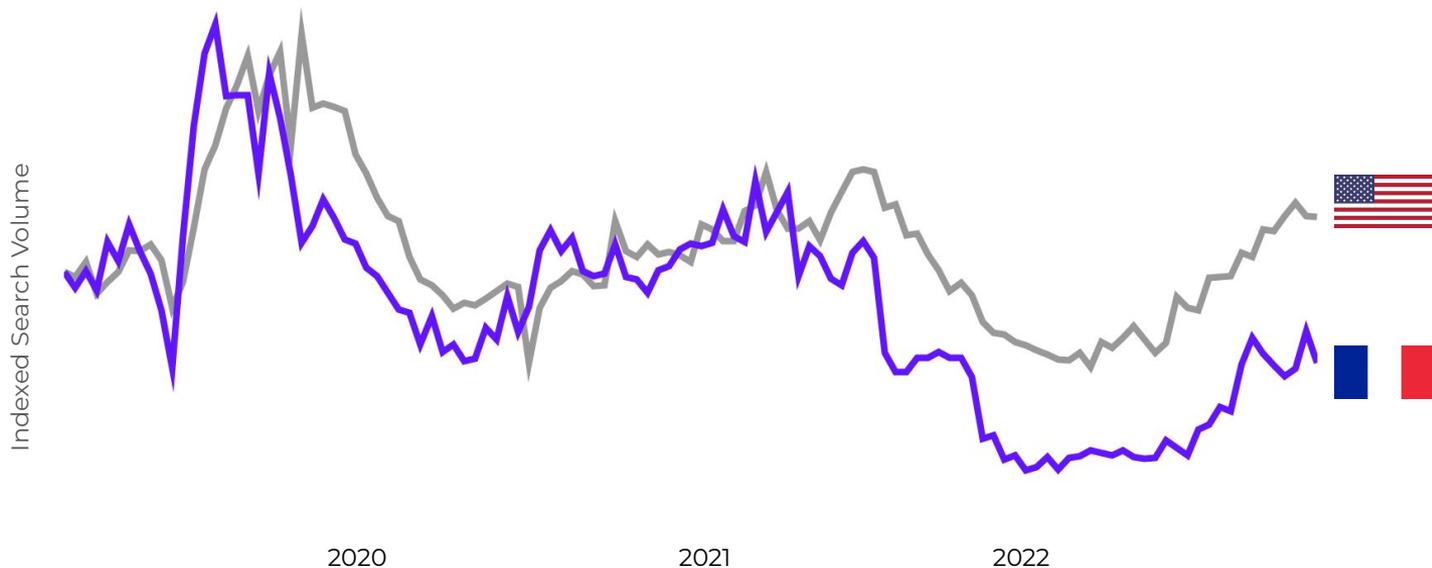
SEARCH VOLUME

SKINCARE SEARCH EVOLUTION:

Though the US has seen a stronger upswing for skincare early in 2022, **search patterns across both markets are similar.**

Brands should take note of the broader (and international) seasonality of the skincare category, monitoring spikes and dips to use to their advantage.

Source: Google Search data, 2020 vs. 2021 vs. 2022





**FACE
PRODUCTS**

Skincare trends driving the biggest positive change in search volume across the US and FR markets:



FR TRENDS BY SEARCH VOLUME INCREASE

Trend	Increase ↓
face serum	+4.8K
pimple patch	+1.5K
face toner	+1.3K
redness treatment cream	+570
cleansing balm	+430
spironolactone for acne	+357
under eye patches	+248
hyaluronic acid face mask	+156
face mist	+80
exfoliating wash	+8



US TRENDS BY SEARCH VOLUME INCREASE

Trend	Increase ↓
facial mask stick	+168.4K
chemical peel	+32.2K
makeup remover	+19.6K
tretinoin cream	+18.4K
vitamin k cream	+14.7K
under eye patches	+11.6K
spot remover	+11.3K
hydrocolloid patches	+10.0K
gua sha oil	+7.2K
spf moisturizer	+6.1K

As trendy products like the facial mask stick and gua sha oil gain popularity in the US, **classic products — think face serums, cleansing balms, and face mists — dominate search volume increase for French consumers.**

FACE SERUM

FACE SERUM

MONTHLY AVERAGE SEARCHES

FR **144.9K**

YOY GROWTH

+3.4%

US **215.6K**

-12.5%



FR Top Volume Concerns & Brands

Concerns	Search Volume↓ (Average Monthly)
spots	14.5K
blemishes	6.3K
complexion	1.4K
wrinkles	840
acne	830

Brands	Search Volume↓ (Average Monthly)
la roche-posay	27.7K
caudalie	20.3K
guerlain	14.0K



US Top Volume Concerns & Brands

Concerns	Search Volume↓ (Average Monthly)
wrinkles	21.0K
spots	16.2K
acne	8.5K
oily	8.2K
dry	7.5K

Brands	Search Volume↓ (Average Monthly)
the ordinary	26.8K
skinceuticals	106.6K
no7	73.3K

In France, **over the counter serums are used more for spots (including both dark spots and post-inflammatory hyperpigmentation)**, while in the US, consumers most searched concern alongside serums is wrinkles.

UNDER EYE PATCHES

UNDER EYE
PATCHES

MONTHLY
AVERAGE
SEARCHES

FR **2.9K**

US **71.1K**

YOY
GROWTH

+9.3%

+19.5%



FR Top Volume Concerns & Brands

Concerns	Search Volume↓ (Average Monthly)
dark circles	2.3K

Brands	Search Volume↓ (Average Monthly)
mary kay	50
klorane	40



US Top Volume Concerns & Brands

Concerns	Search Volume↓ (Average Monthly)
puffiness	2.4K
dark circles	2.2K
wrinkles	2.0K
eye bags	1.8K
fine lines	70

Brands	Search Volume↓ (Average Monthly)
pixi beauty	12.9K
mary kay	11.6K

In France, **there's a heavy focus on dark circles despite a smaller search volume for this trend**, emphasizing the importance of the concern among French skincare consumers,

A close-up photograph of a woman with dark hair and eyes, looking upwards and to the side. She is applying a white cream to her under-eye area with her fingers. The image is semi-transparent and serves as a background for the text.

[INGREDIENTS]

Skincare ingredients driving the biggest positive change in search volume across the US and FR markets:



FR TRENDS BY SEARCH VOLUME INCREASE*

Trend	Increase ↓
vitamin c	+2.4K
niacinamide	+2.4K
salicylic acid	+856
spironolactone	+357
bakuchiol	+281
collagen	+183
carrot oil	+164
benzoyl peroxide	+19



US TRENDS BY SEARCH VOLUME INCREASE

Trend	Increase ↓
green tea	+42.5K
retinoin	+17.3K
spironolactone	+5.4K
argireline	+3.7K
copper peptide	+2.2K
pomegranate	+2.2K
estrogen	+2.0K
propolis	+1.5K
omegas	+1.3K
tepezcohuite	+925

More ingredients are trending across skincare in the US than in France. Scientific ingredients are gaining interest in France, but we still see rising interest in different plant-derived ingredients. For both markets, consumers are searching “natural” *and* scientific approaches.

CARROT OIL + FACE PRODUCTS

Often praised as a vitamin-rich plant oil with multiple skin benefits, carrot oil is rising in French skincare searches.

In France, searches for *huile de carotte peau claire*, which literally translates to light skin carrot oil, indicate **consumers are using this ingredient to treat skin discoloration or lighten their skin.**

CARROT OIL + FACE PRODUCTS

MONTHLY AVERAGE SEARCHES

FR **2.3K**

YOY GROWTH

+7.7%

US **5.3K**

-23.0%



FR Top Volume Search Queries

“Face carrot oil”
“Face carrot oil before and after”
“Carrot face oil reviews”
“Light skin carrot oil”



US Top Volume Search Queries

“Carrot oil for skin”
“Carrot seed oil skin benefits”
“Carrot oil benefits for skin”



NIACINAMIDE + FACE PRODUCTS

Niacinamide is a form of vitamin B3 that has been shown to help reduce redness and inflammation, prevent signs of aging, as well as smooth and brighten the skin.

Popular in the US since 2020, **niacinamide has only recently begun its ascent in France.**

NIACINAMIDE
+ FACE PRODUCTS

MONTHLY
AVERAGE
SEARCHES

FR **9.6K**

YOY
GROWTH

+35.8%

US **376.5K**

-16.4%



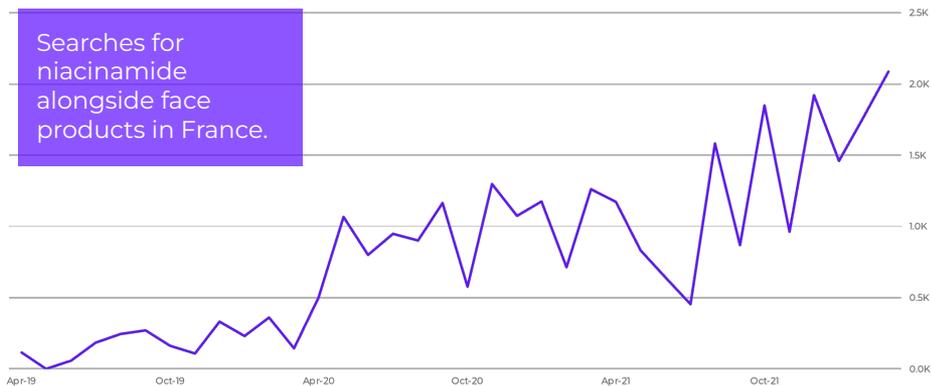
FR Top Volume Search Queries

"The ordinary niacinamide 10 zinc 1"
"Niacinamide serum"
"Creme niacinamide"
"La roche posay niacinamide"

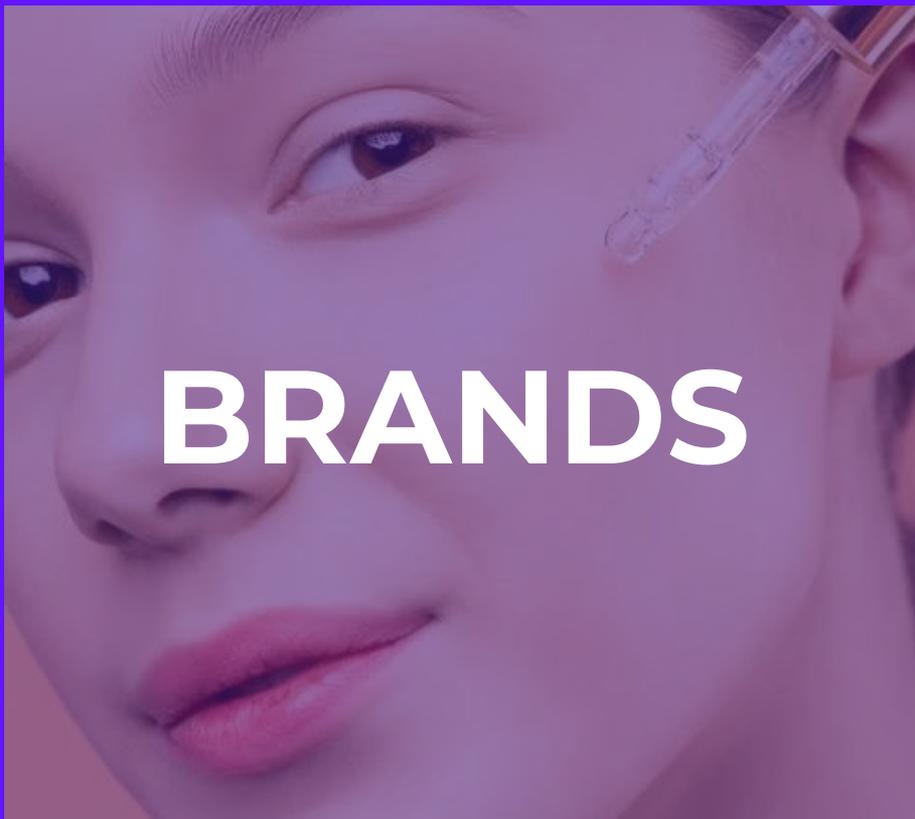


US Top Volume Search Queries

"The ordinary niacinamide"
"Niacinamide serum"
"Niacinamide benefits"
"What does niacinamide do?"



Source: US Search from April 2021 to March 2022 vs. April 2020 to March 2021



[

BRANDS

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Skincare brands driving the biggest positive change in search volume across the US and FR markets:



CLARINS
+7.4K
increase in avg monthly searches



CAUDALIE
+7.2K



LA ROCHE-POSAY
+3.7K



CERAVE
+3.5K



SVR
+3.2K



PETER THOMAS ROTH
+66.9K
increase in avg monthly searches



LANCÔME
+28.9K



FROWNIES
+25.0K



SELFLESS BY HYRAM
+20.7K



LANEIGE
+20.1K

+32.0K
FROWNIES

CLARINS

The growth of the classic brand Clarins in French skincare searches reinforces the phenomenon noted in product trends: **the French consumer loves the classics.**

The top search query is for the Clarins Double Serum, **reflective of serums as the top change driver among French skincare trends.**

CLARINS
+ FACE PRODUCTS

MONTHLY
AVERAGE
SEARCHES

FR **29.5K**

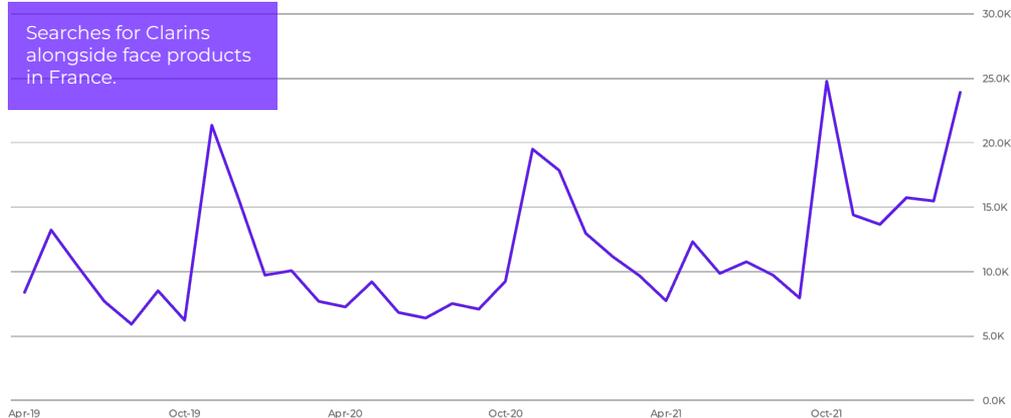
US **1.9K**

YOY
GROWTH

+33.3%

-5.2%

Searches for Clarins alongside face products in France.



- “clarins double serum”**
- “creme clarins”**
- “serum clarins”**
- “clarins creme de jour”**
- “baume beauté éclair clarins”**
- “double serum eye clarins”**
- “clarins serum”**
- “double serum clarins avis”**
- “doux nettoyant moussant clarins”**
- “creme rose lumiere clarins”**
- “creme clarins femme”**



SPATE POV

With the launch of French data at Spate, we're happy to offer an increasingly international perspective that shows how consumers outside of the US are searching for beauty trends. With this deep dive into French consumer searches, brands have several opportunities to pursue among this audience.

Scientific actives are having a moment. Ingredients like vitamin C, niacinamide, and salicylic acid drive change and growth across the skincare category for the French skincare audience. Having seen the spike and subsequent decline of ingredients like this in the US, brands should consider how to prepare for a similar trajectory in the French market.

Try a hybrid approach. When looking at ingredients especially, there's an apparent interest in scientific ingredients like tretinoin and niacinamide coupled with growing interest in more "natural" ingredients like green tea or carrot oil. For both markets, brands should consider combining a clinical approach with popular botanical ingredients consumers know and love to attract new customers while piquing the interest of existing ones.

Rely on the classics. The US market demonstrates a strong interest in new, trendy products. However, French consumers consistently seek out the classics. For further product development for this customer, brands should consider leaning into existing formats but dressing them up with new popular ingredients.

SPATE: MACHINE INTELLIGENCE FOR THE BEAUTY INDUSTRY.

What's The Next Big Trend?

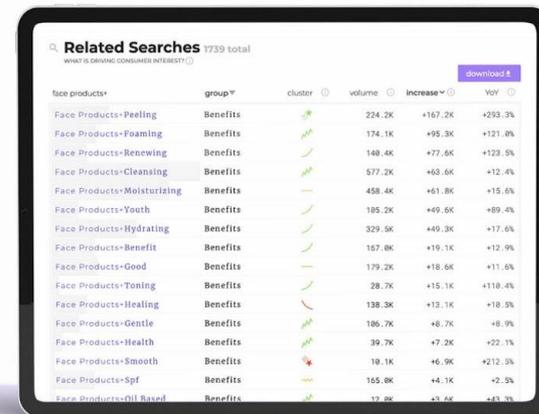
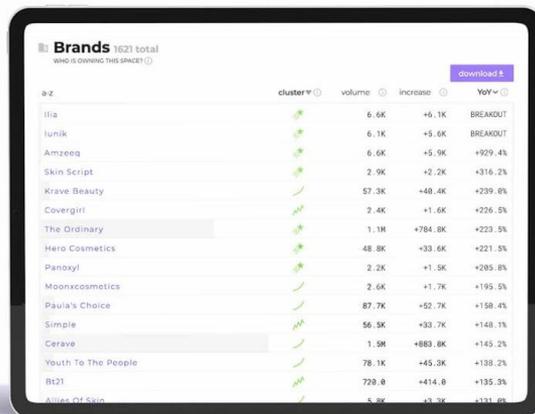
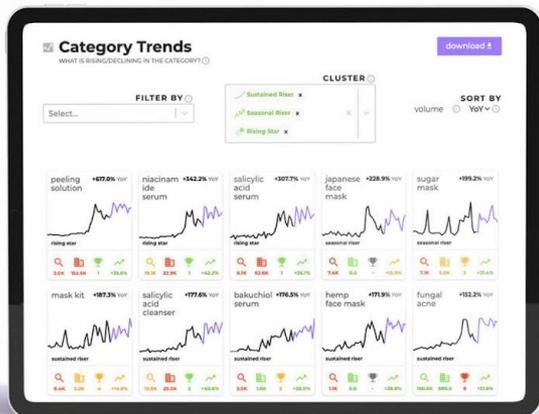
20+ billion signals in beauty and wellness to spot and predict which trends are here to stay.

Which brands are owning the space?

Measure level of competition within a space. Compare consumer interest across brands, including DTC.

How To Position A Product?

Contextual data to identify consumer needs (claims, concerns, ingredients) for messaging.



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