

THG BEAUTY

# SPF & SUN HEALTH SURVEY



A CONSUMER SURVEY

THG

# Methodology/Introduction

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## WHO WE SPOKE TO?

**5000+ UK BEAUTY  
respondents**

All participants in the survey expressed an interest in make-up and beauty. We maintained soft nationally representative cohorts across various social grades and age groups, although there was a slight underrepresentation of individuals aged 60 and over.

## PLEASE NOTE

- Significant differences at 95% versus the total are noted.
- For reference, the total sample size, cohort split, and the survey questions answered are at the bottom of each slide.

SPF CONSUMER SURVEY 2025

# Introduction

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## The story behind the survey?

As global temperatures rise and skin cancer cases increase, particularly in the UK, understanding sun protection among beauty respondents is crucial.

In 2024, the UK saw around 17,500 new melanoma cases, projected to rise to 26,500 by 2038. This trend underscores the need for better public awareness and preventive measures.

2024 also marked the hottest year on record, with global temperatures exceeding pre-industrial levels by 1.47 to 1.62 degrees Celsius, further elevating the risk of skin damage from UV radiation and heat-related health issues.



SPF CONSUMER SURVEY 2025

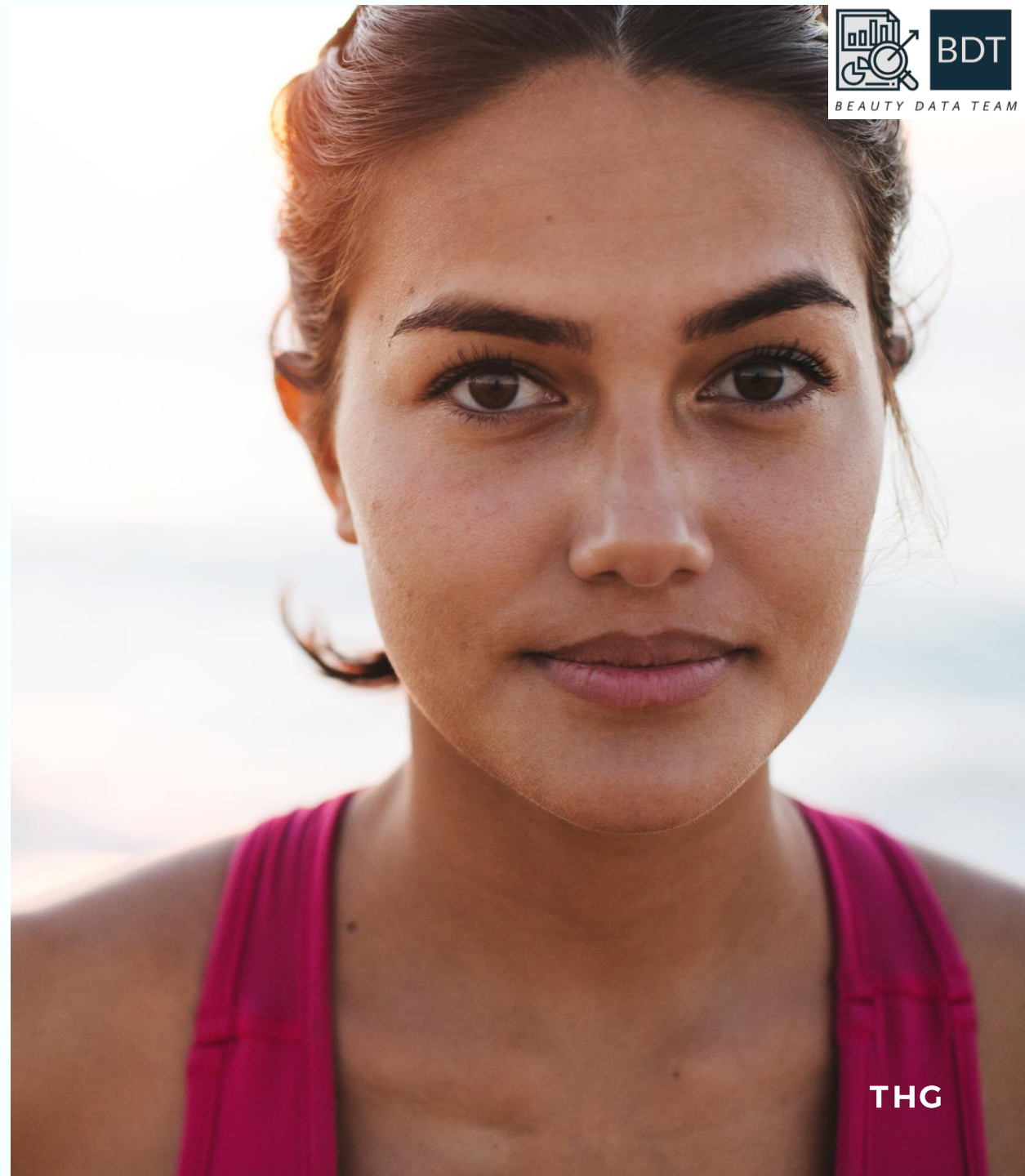
## SECTION 1: Tanning and skin relationship

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In this section, we explored what respondents value in skincare information and their views on tanning.

Our findings revealed:

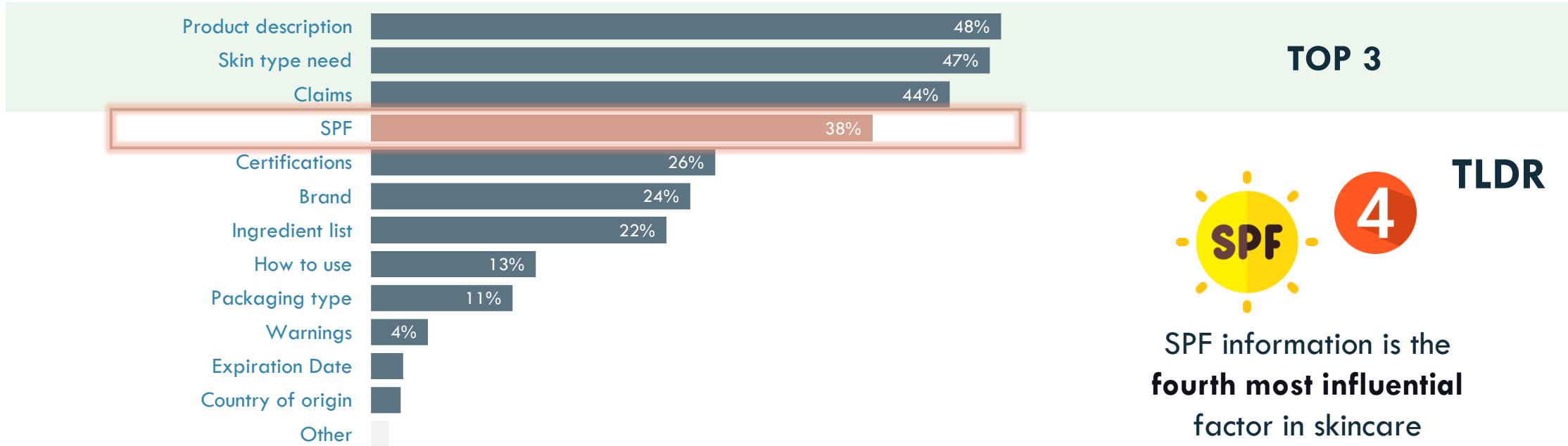
- SPF ranks as the fourth most important piece of information on products, lower than product descriptions, skin type needs, and claims.
- Half of the respondents consider tanning important, with a preference for safer methods like moisturisers and mousses.
- Only 10% still view tanning beds as essential for achieving their desired tan.



SPF CONSUMER SURVEY 2025

We asked respondents what information is most important when choosing a skincare product

IMPORTANCE RANKING



TOP 3



TLDR

SPF information is the **fourth most influential** factor in skincare purchases.

# SPF CONSUMER SURVEY 2025

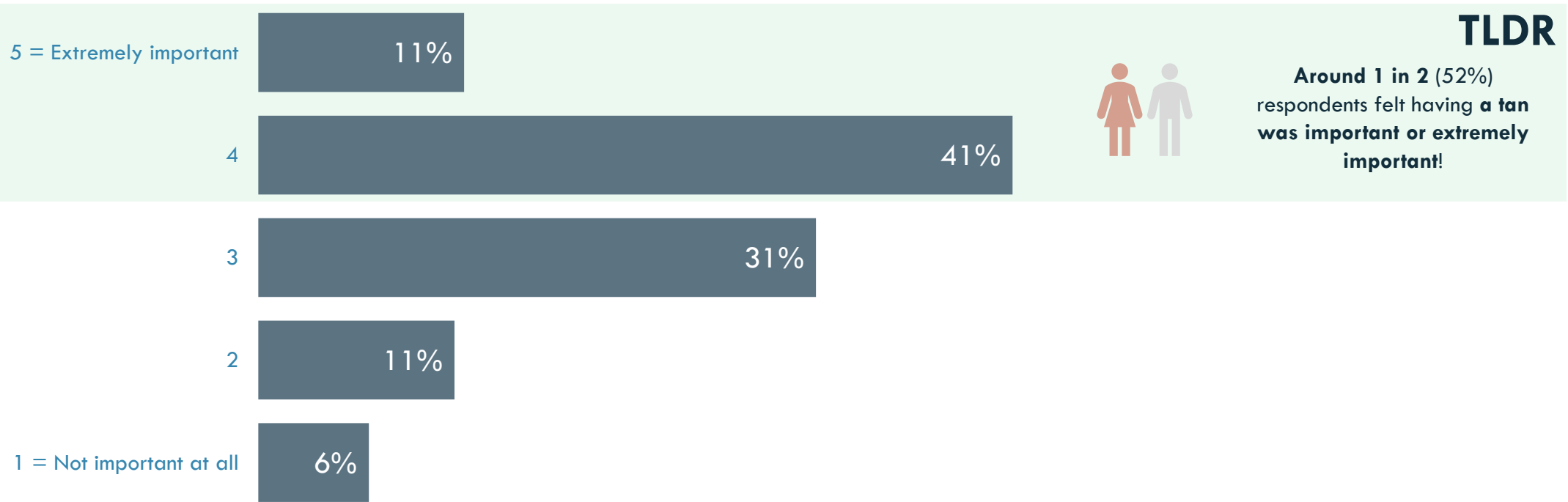
Interestingly, the importance of purchasing skincare products with SPF decreases slightly for younger respondents; however, it remains the second most important factor for Baby Boomers

	Gen Z (Born 1997+)	Millennial (Born 1981-1996)	Gen X (Born 1965-1980)	Baby Boomer (Born 1946-1964)	Grand Total
#1	Skin type need	Skin type need	Product description	Claims	Product description
#2	Product description	Product description	Claims	<b>SPF</b>	Skin type need
#3	Ingredient list	Claims	Skin type need	Skin type need	Claims
#4	Certifications	<b>SPF</b>	<b>SPF</b>	Product description	<b>SPF</b>
#5	<b>SPF</b>	Brand	Certifications	Certifications	Certifications
#6	Claims	Certifications	Brand	Brand	Brand
#7	Brand	Ingredient list	Ingredient list	Ingredient list	Ingredient list
#8	Packaging type	Packaging type	How to use	How to use	How to use
#9	How to use	How to use	Packaging type	Packaging type	Packaging type
#10	Warnings	Warnings	Warnings	Warnings	Warnings
#11	Country of origin	Expiration date	Expiration date	Expiration date	Expiration date
#12	Expiration date	Country of origin	Country of origin	Country of origin	Country of origin

MARKET INTELLIGENCE

# SPF CONSUMER SURVEY 2025

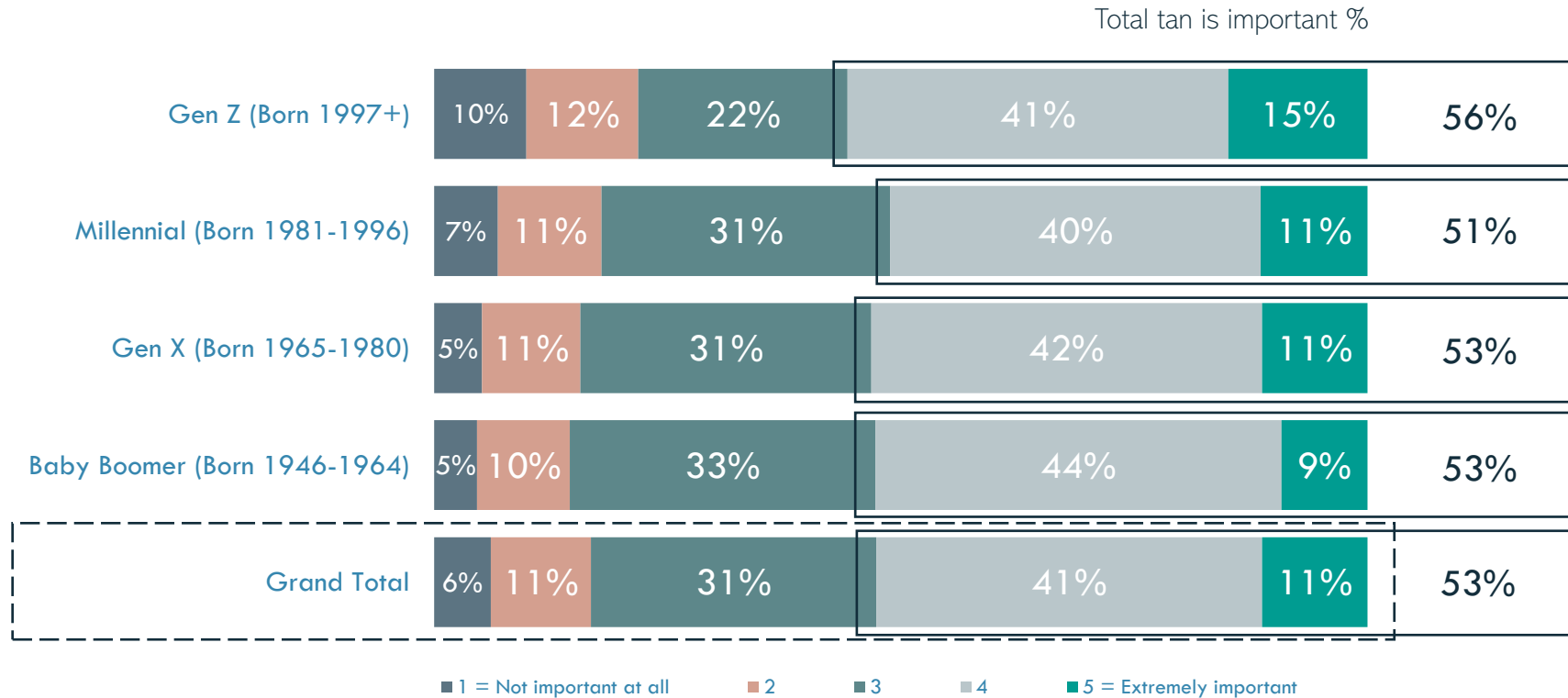
We then asked, on a scale of 1 to 5, how important was having a tan to them



MARKET INTELLIGENCE

SPF CONSUMER SURVEY 2025

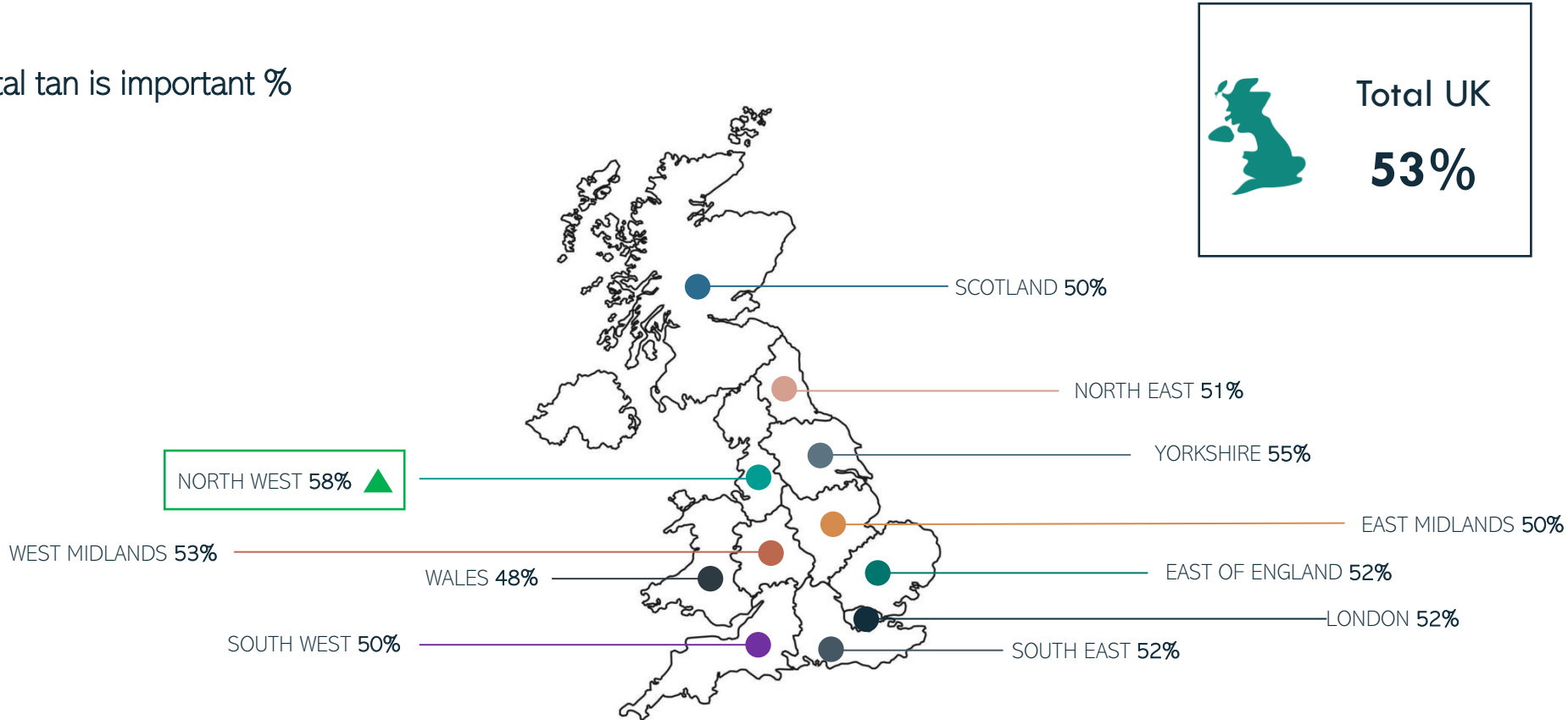
Although there were no significant differences, Gen Z were 3% more likely than total respondent % to believe that having a tan is important to them



ROW = 100%

# Respondents living in the North West were significantly more likely to find having a tan important than the average across the UK

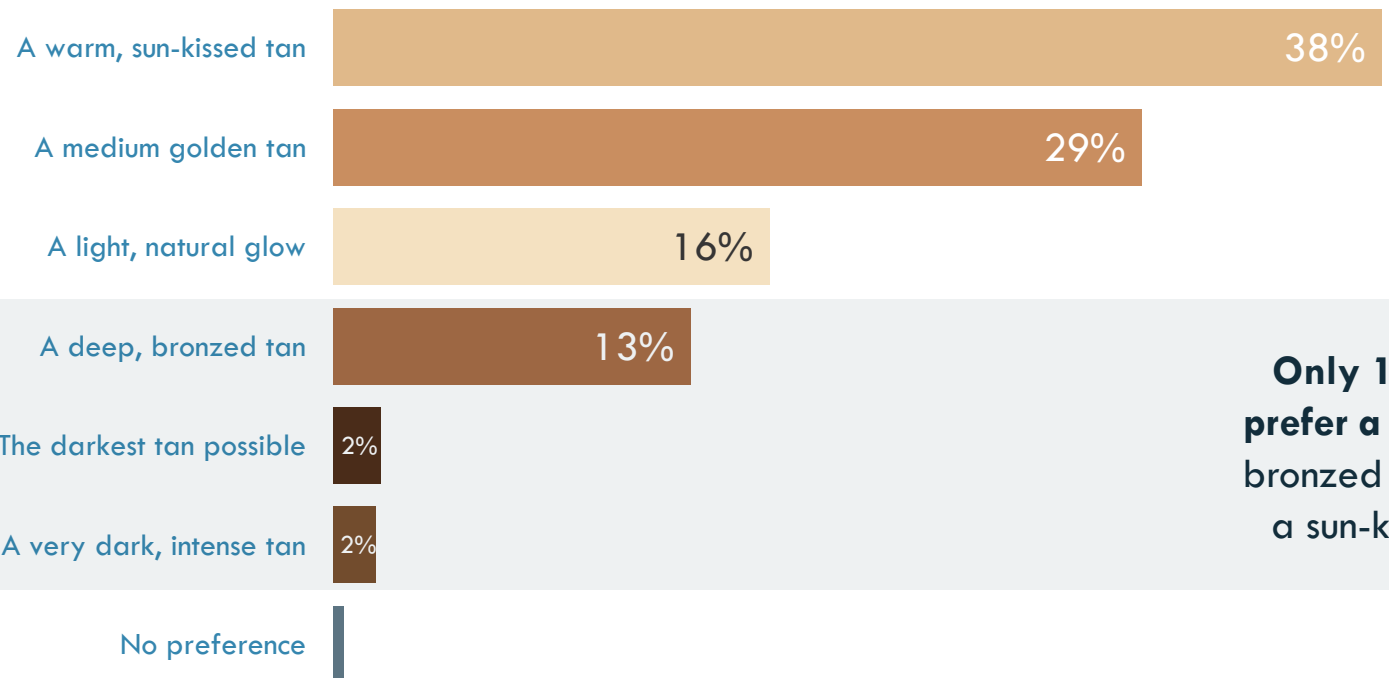
Total tan is important %



 = Significantly more vs Grand Total at 95%

9 Q6. In general, how important is having a tan to you? Total: 5222, East Midlands (536), East of England (593), London (346), North East (253), North West (611), Scotland (443), South East (614), South West (408), Wales (262), West Midlands (540), Yorkshire (540) – Isle of Man, NI excluded due to low samples

Of those who thought having a tan was important, we asked about their desired level of tan



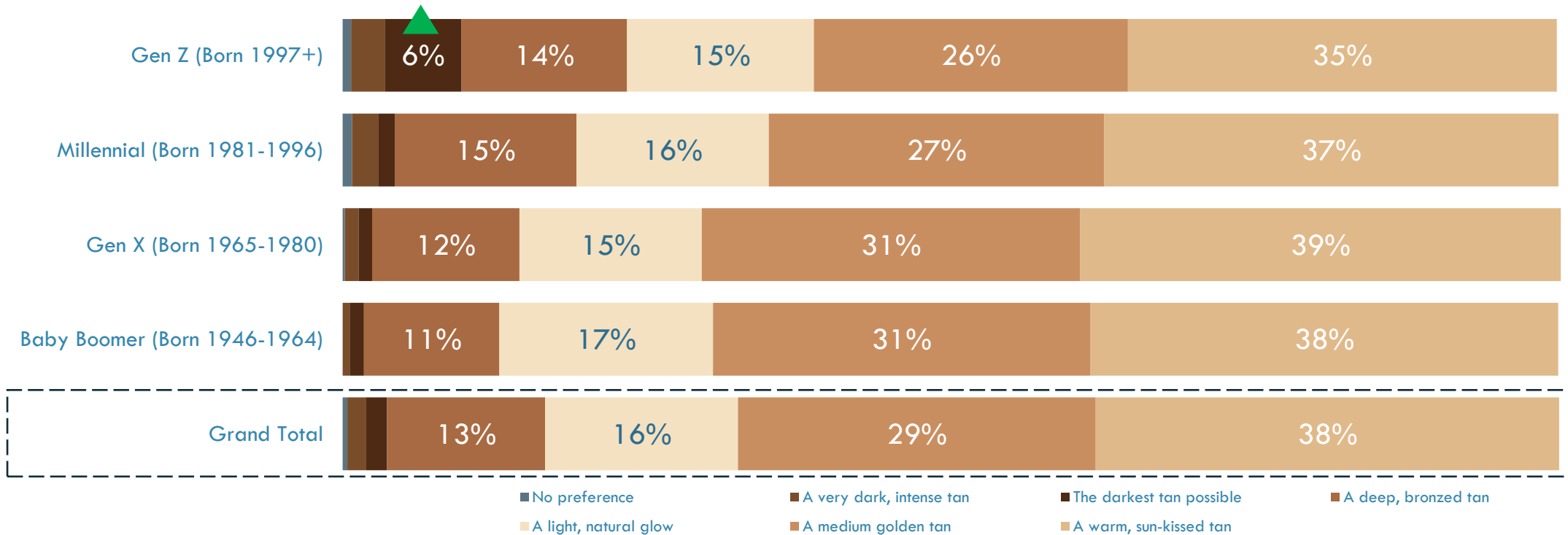
**Only 16% of respondents prefer a dark, intense, or deep bronzed tan, while most favour a sun-kissed or medium tan.**



**TLDR**

SPF CONSUMER SURVEY 2025

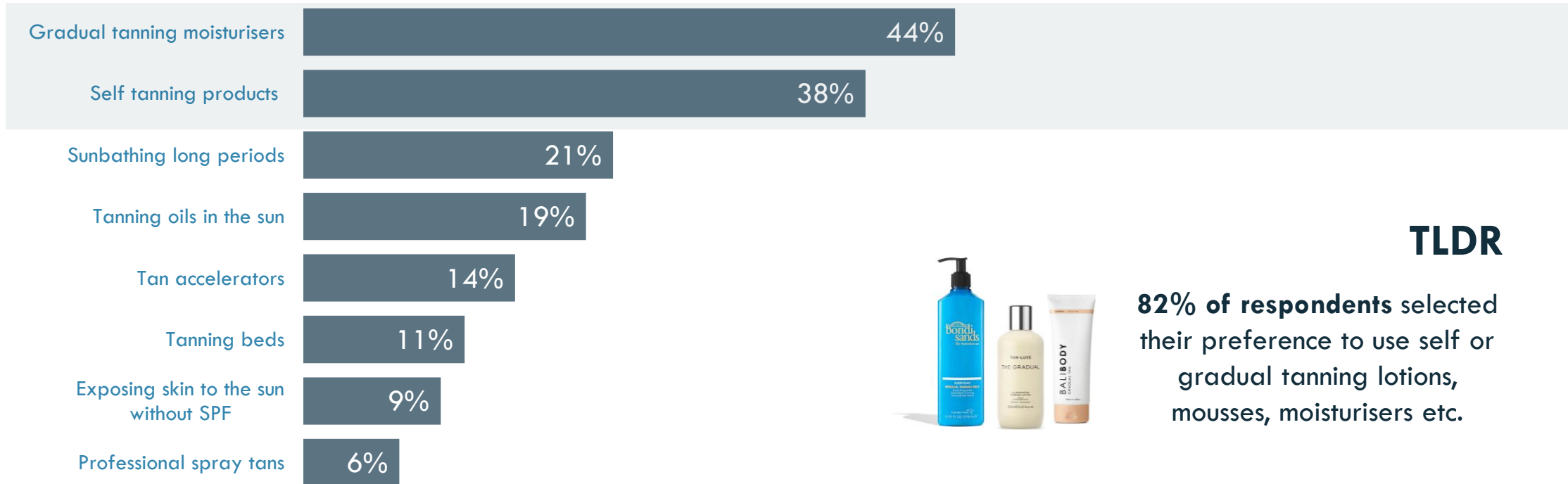
There were no major differences in the popular level of tan across generations, but Gen Z were significantly more likely to prefer the darkest colour possible



▲ = Significantly more vs Grand Total at 95%

ROW = 100%

## Continuing, we asked preferred methods that they use to achieve their desired tan

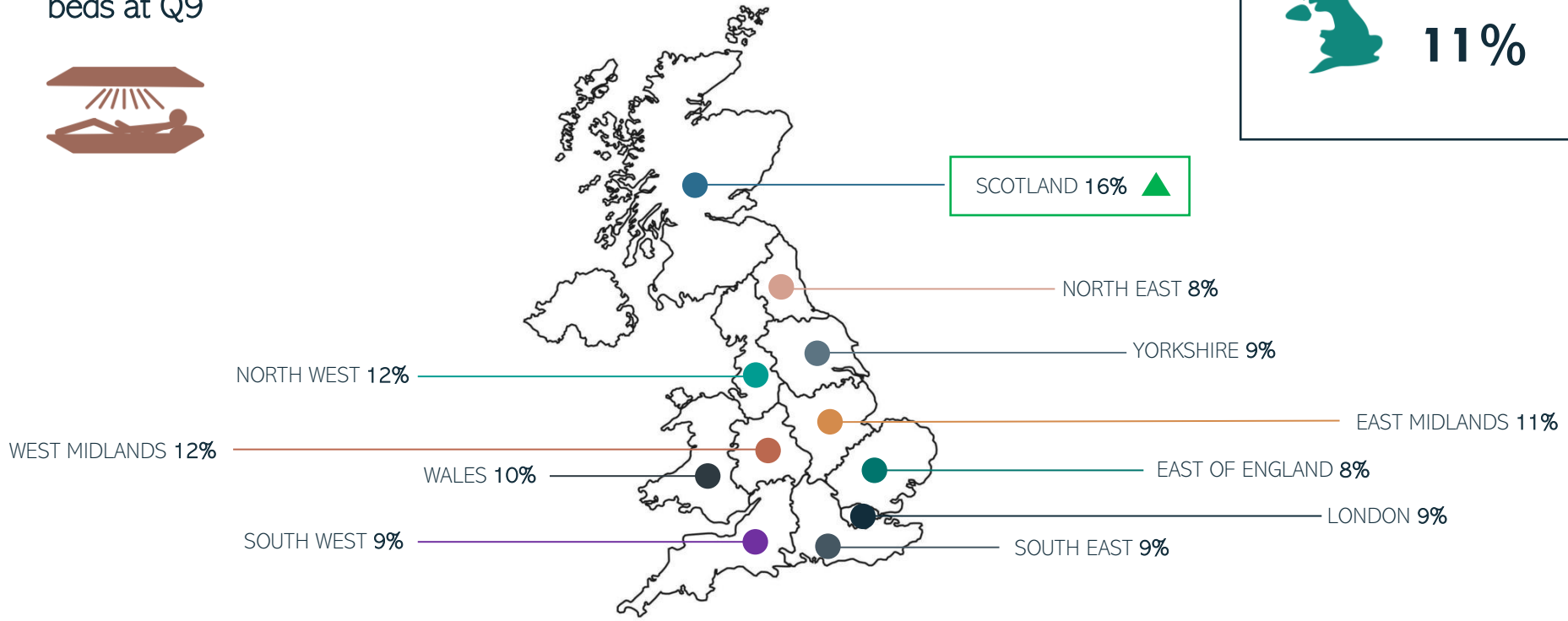


### TLDR

**82% of respondents** selected their preference to use self or gradual tanning lotions, mousses, moisturisers etc.

Only around 1 in 10 are using tanning beds to achieve their ideal tan, although respondents in Scotland were significantly more likely than total to say they used a tanning bed

% who selected Tanning beds at Q9



▲ = Significantly more vs Grand Total at 95%

13 Q9. And using the same list of methods, which ones do you personally prefer to use? N: 2742 East Midlands (269), East of England (306), London (181), North East (130), North West (355), Scotland (223), South East (317), South West (408), Wales (205), West Midlands (294), Yorkshire (296) – Isle of Man, NI excluded due to low samples Only respondents who scored 4 or 5 at Q6

SPF CONSUMER SURVEY 2025

## SECTION 2: SPF knowledge

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Here we aim to explore respondents' worries about sun damage, their understanding of SPF, and thoughts on costs and government guidelines.

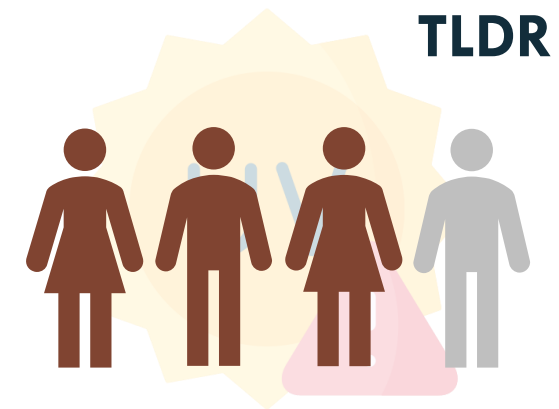
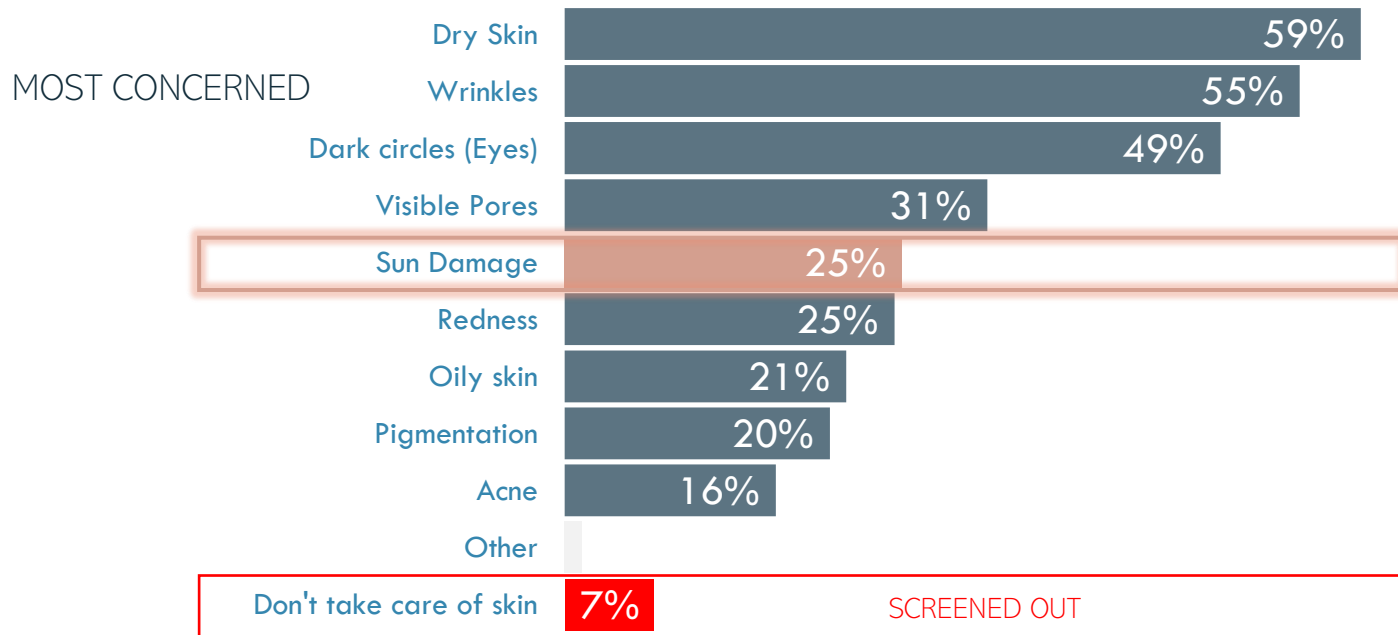
### Our findings revealed:

- Respondents prioritised skin issues relevant to their age group over sun damage. For instance, Gen Z is mainly concerned about acne, while Gen X and Baby Boomers focus on wrinkles. Nevertheless, 88% are worried about developing melanoma.
- Only 35% correctly understood that SPF 30 means they can stay in the sun 30 times longer before burning.
- Alarming, 45% mistakenly thought it referred to the percentage of UV rays blocked.
- This confusion is particularly high among Gen Z and Millennials, with 70% answering incorrectly—double the overall sample rate!
- Although, 67% of respondents were aware that the UK minimum SPF recommended for daily use is SPF 30!



SPF CONSUMER SURVEY 2025

We first asked respondents about their concerns regarding skin care to understand where sun damage ranked



**3 in 4 respondents admit they are neglecting to address sun damage concern in their skincare routine!**

SPF CONSUMER SURVEY 2025

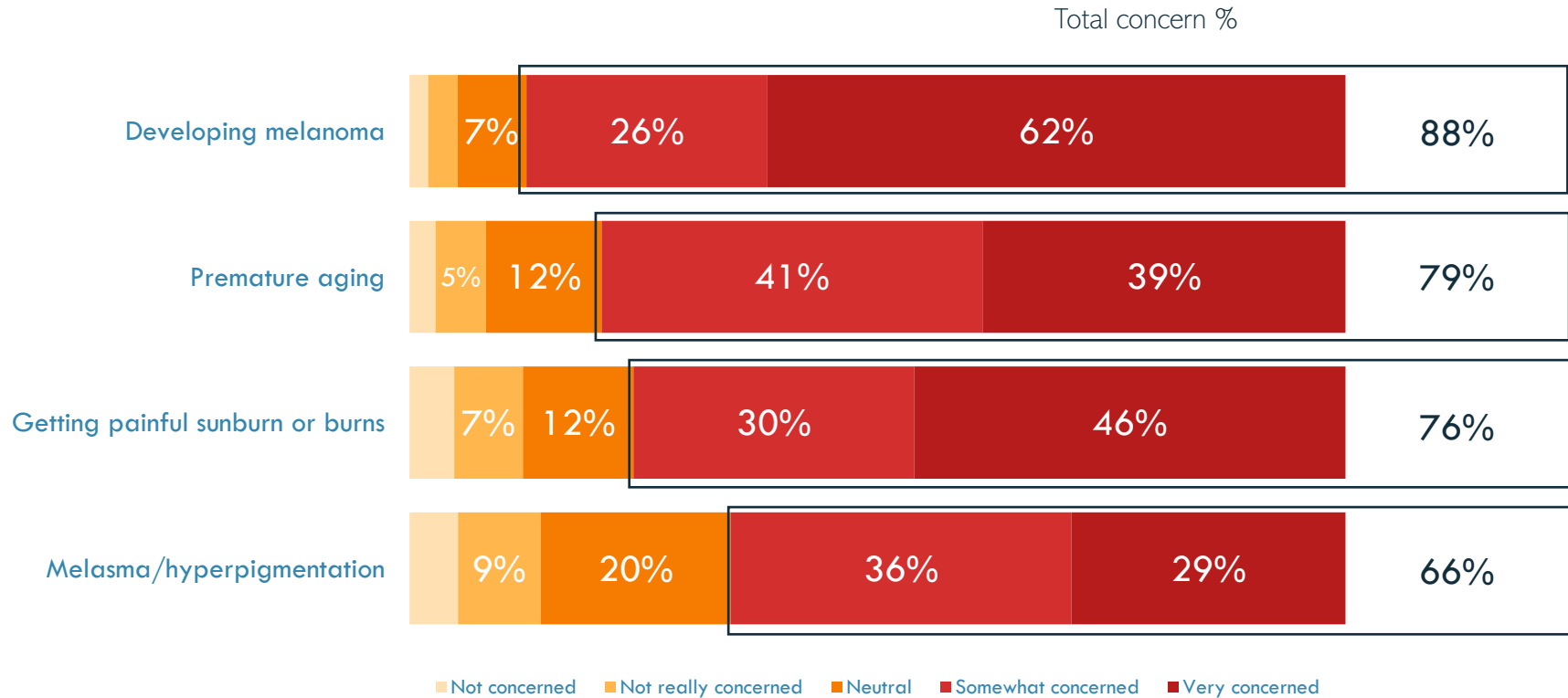
# We found that Gen Z is significantly less likely to be concerned about sun damage compared to Gen X and Baby Boomers

CONCERN RANKING		Gen Z (Born 1997+)	Millennial (Born 1981-1996)	Gen X (Born 1965-1980)	Baby Boomer (Born 1946-1964)	Grand Total
#1	Dry Skin	65%	65%	56%	52%	59%
#2	Wrinkles	17%	43%	67%	71%	55%
#3	Dark circles (Eyes)	49%	48%	52%	45%	49%
#4	Visible Pores	45%	35%	29%	22%	31%
#5	<b>Sun Damage</b>	<b>19%</b>	<b>23%</b>	<b>27%</b>	<b>27%</b>	<b>25%</b>
#6	Redness	35%	27%	22%	19%	25%
#7	Oily skin	38%	29%	16%	7%	21%
#8	Pigmentation	20%	18%	22%	20%	20%
#9	Acne	47%	22%	8%	3%	16%

  = Significantly less vs Grand Total at 95%

MARKET INTELLIGENCE

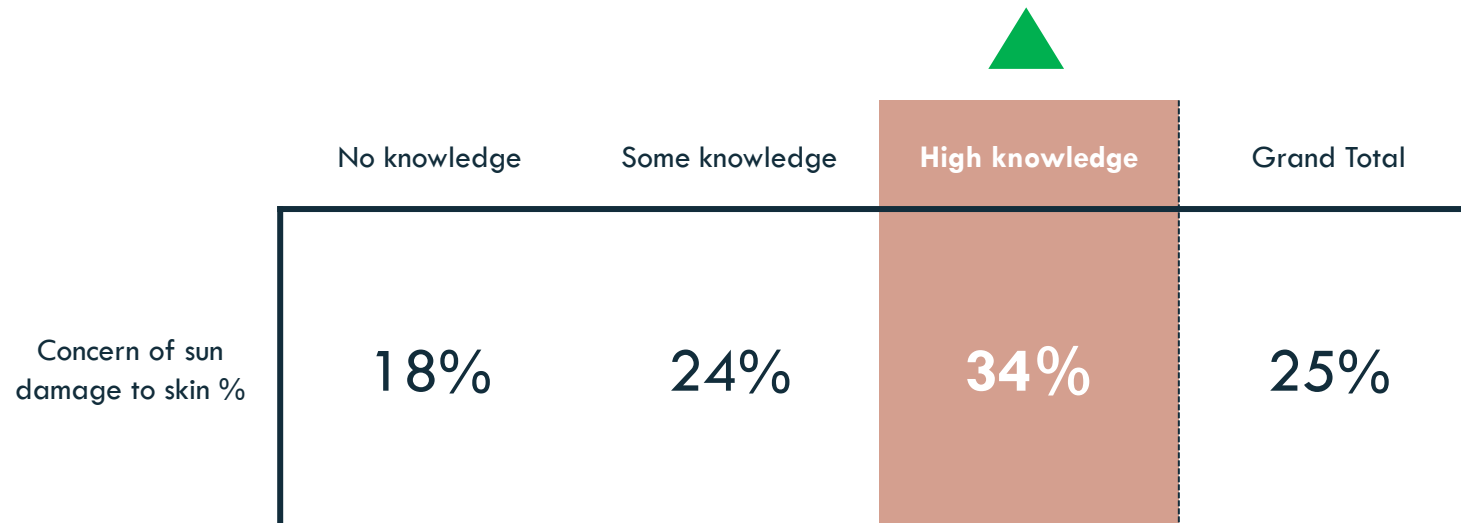
Although sun damage is less concerning than dry skin and wrinkles, about 62% of respondents expressed significant worry about developing melanoma



ROW = 100%

# SPF CONSUMER SURVEY 2025

Respondents were asked to rate their knowledge of skincare. Those who claimed to have a high level of knowledge were only 9% more likely to express concern about sun damage to the skin compared to all other respondents



**TLDR**

Only about **1 in 3** respondents claiming **high skincare knowledge address sun damage** in their skin care routines.

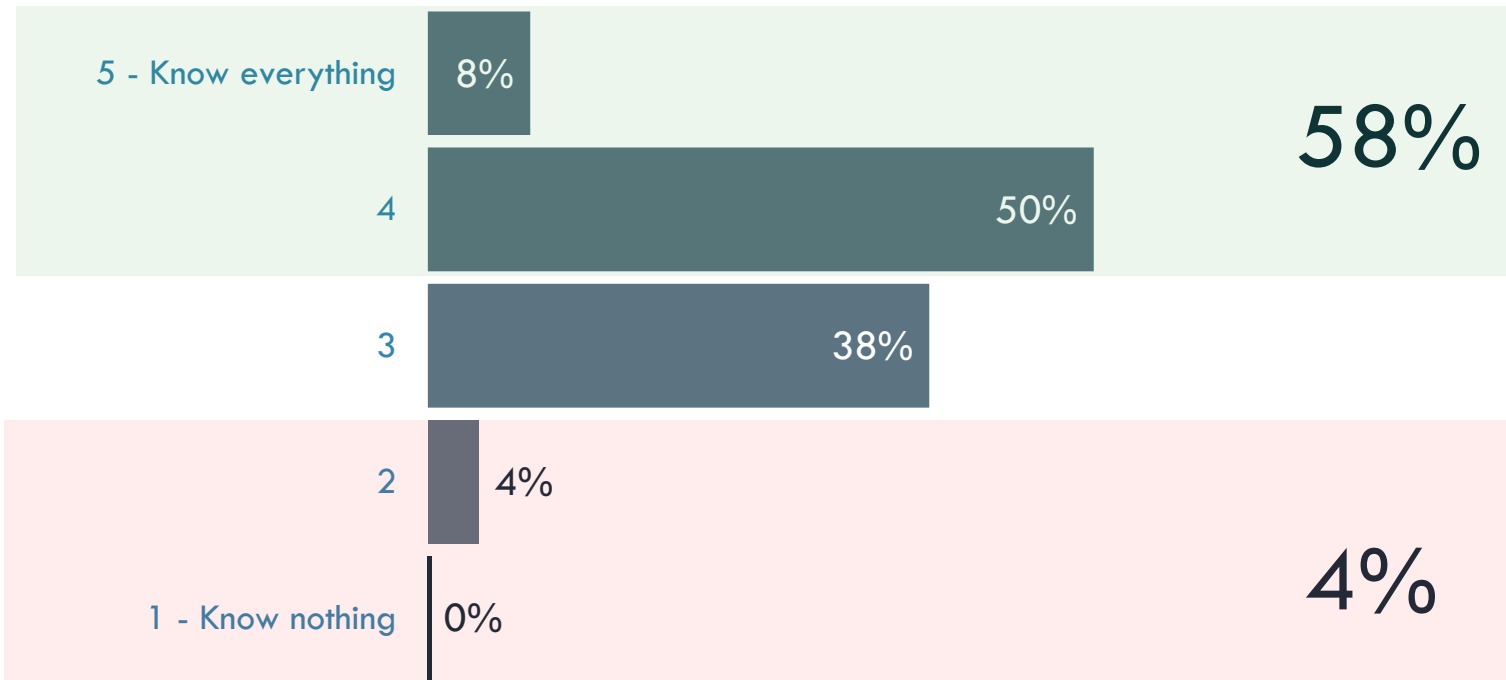
High knowledge = I am knowledgeable and can advise others OR I regularly research and follow skincare trends at Q3

= Significantly more vs Grand Total at 95%

18 Q1. To begin, do you take care of your skin by addressing any of these skincare concerns? (please select all that apply) Q3. How would you rate your skincare knowledge? N:5692 No knowledge (165), Some knowledge (3650), High knowledge (1502)

SPF CONSUMER SURVEY 2025

Next they were asked to rate their **knowledge of SPF** from 1 (Knowing nothing) to 5 (Excellent knowledge)



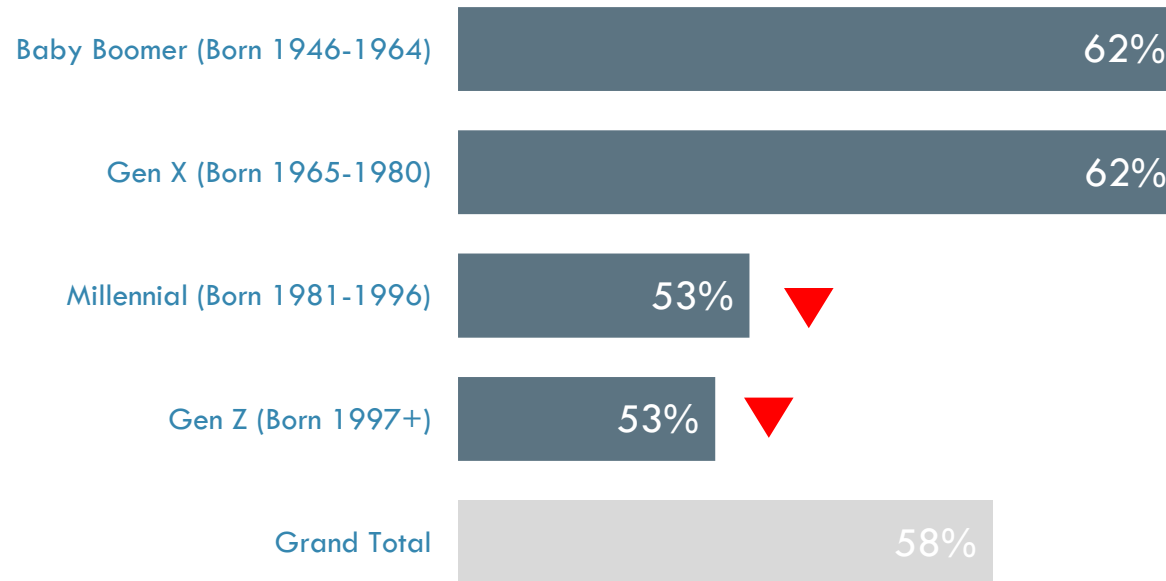
**TLDR**



Despite most scoring their SPF knowledge 4 out of 5, **only 8% of respondents claimed to have excellent knowledge/know everything.**

# Younger respondents are much less likely than the overall group to report a high level of knowledge about SPF

% who scored their SPF knowledge 4 or 5 out of 5.

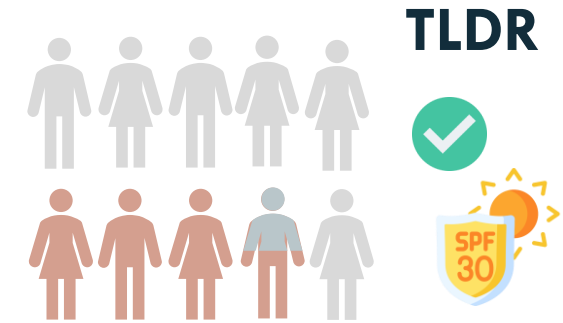
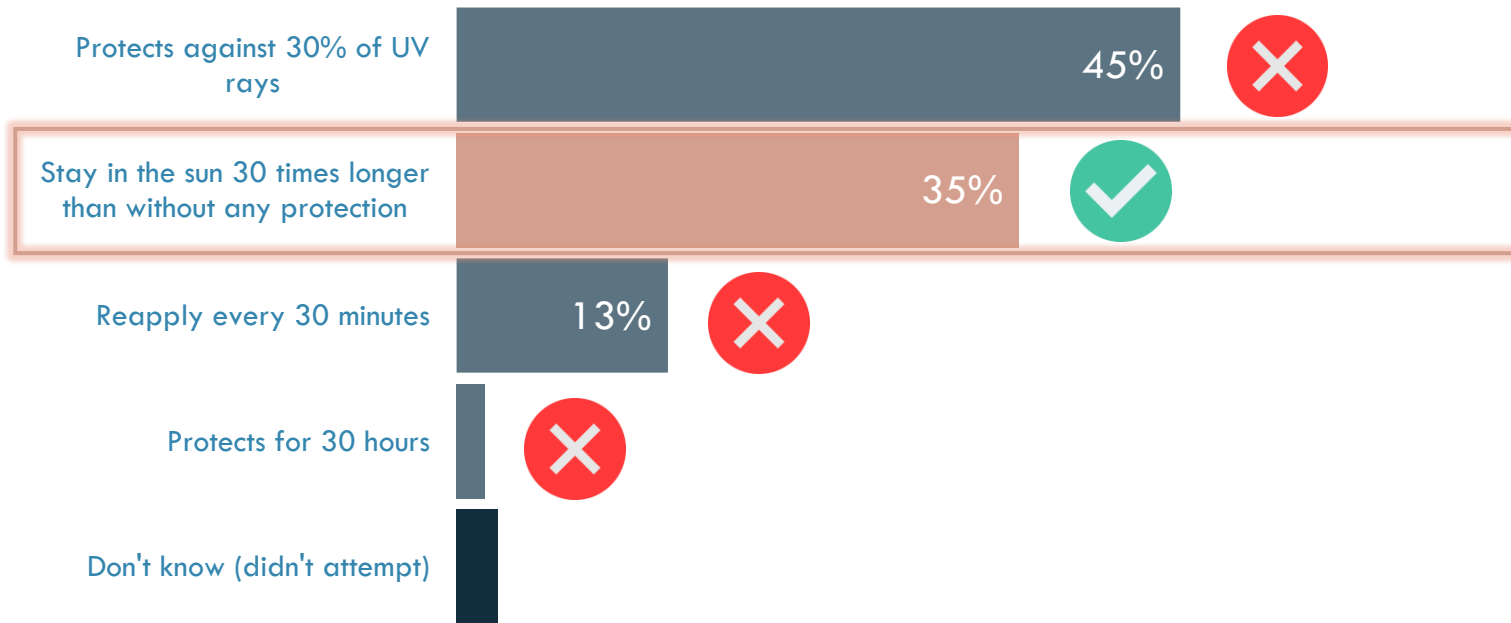


We see a **decline** in claimed SPF knowledge the **younger the respondent (-9%)**

▼ = Significantly less vs Grand Total at 95%

SPF CONSUMER SURVEY 2025

To better understand whether respondents grasped SPF labelling, we quizzed them on the meaning of a product labelled SPF 30



**Only 35% of respondents knew what the SPF number meant** (it offers 30 times more protection than without).

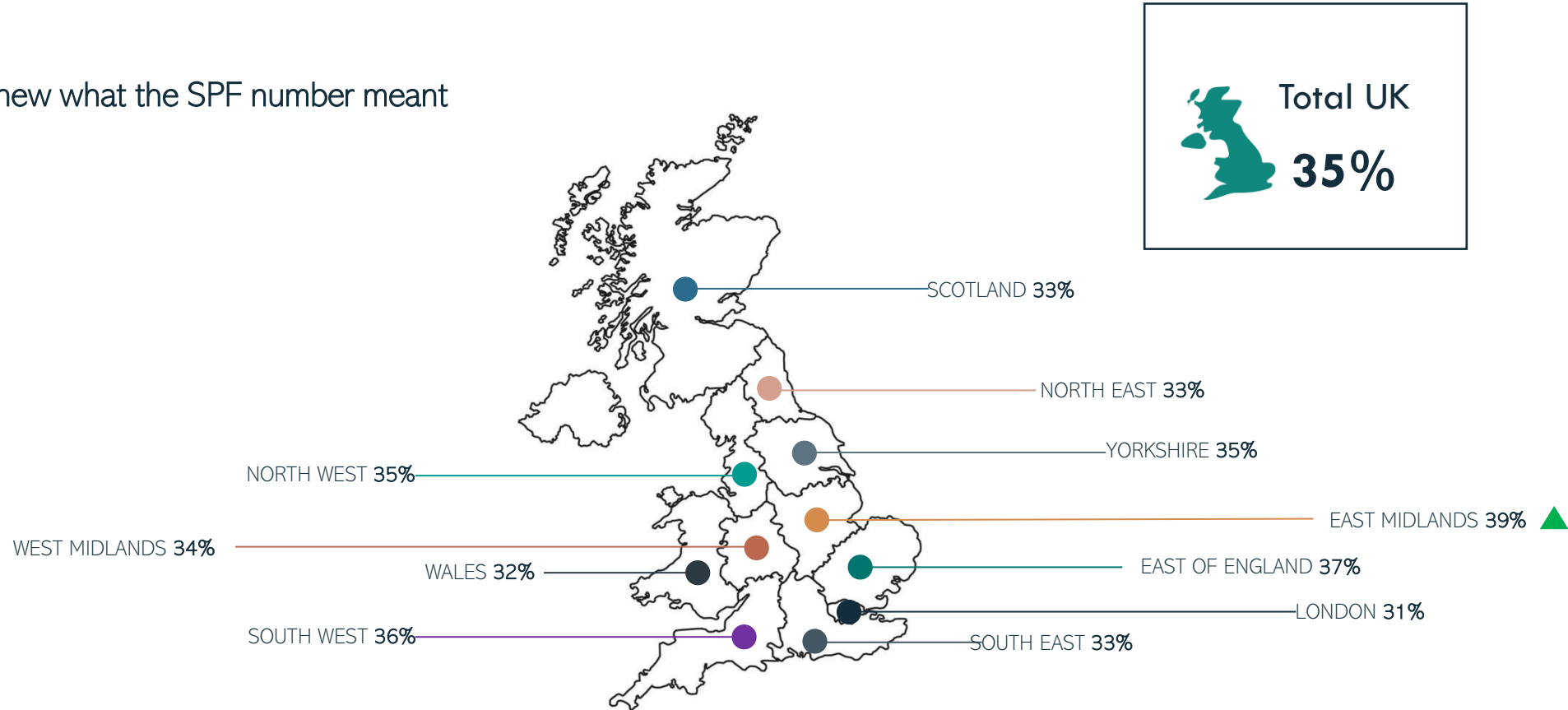
By grouping the % who scored correctly vs. those who didn't, we see that almost **8 out of 10 Gen Z or Millennial consumer got the question incorrect or didn't attempt**

	Gen Z (Born 1997+)	Millennial (Born 1981-1996)	Gen X (Born 1965-1980)	Baby Boomer (Born 1946-1964)	Grand Total
Correct %	21%	25%	42%	43%	35%
Incorrect %	<b>71%</b>	<b>69%</b>	53%	53%	62%
Didn't attempt %	8%	6%	5%	5%	3%

 = Significant difference at 95%

similar respondents who got the correct answer was similar across all areas of the UK, except the East Midlands, which had the highest % of respondents getting the correct answer

% who knew what the SPF number meant

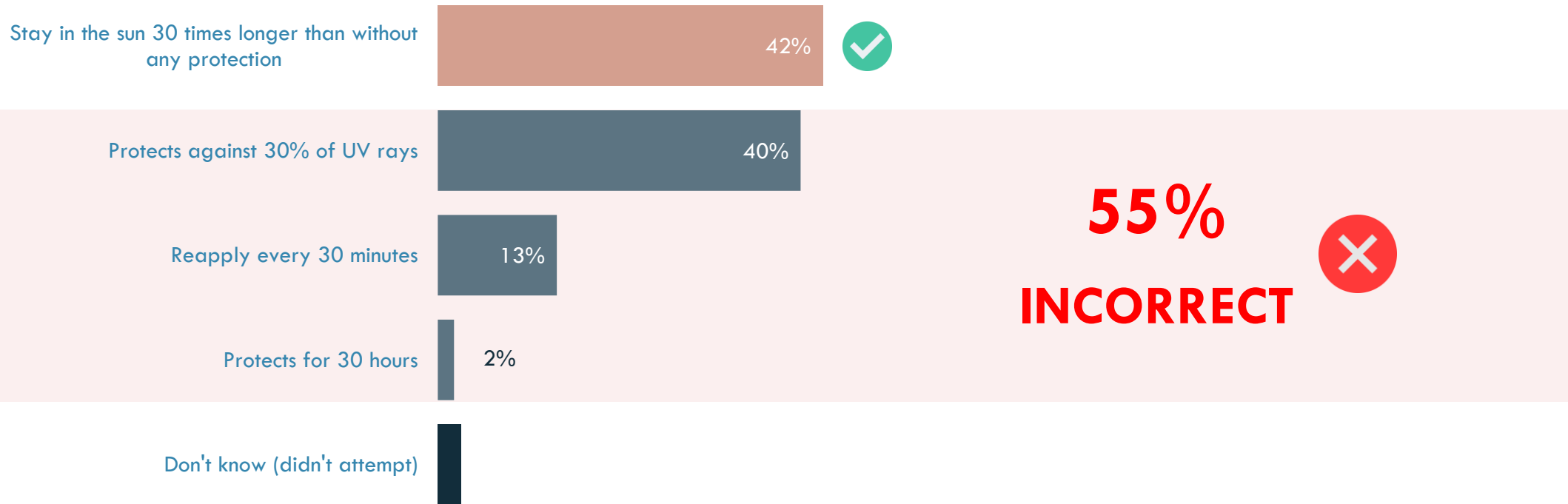


▲ = Significantly more vs Grand Total at 95%

23 Q12. To test your SPF knowledge, we have a quick quiz question to test your knowledge. Which of the below do you think is the answer to why a product is labelled SPF 30?. N: 5222 East Midlands (536), East of England (593), London (346), North East (253), North West (611), Scotland (443), South East (614), South West (408), Wales (262), West Midlands (540), Yorkshire (540) – Isle of Man, NI excluded due to low samples

Alarminglly, **only 42%** of respondents who claimed to have **excellent knowledge** of SPF selected the **correct answer!**

Respondents who claimed "5 – Know everything" about SPF at Q1 1



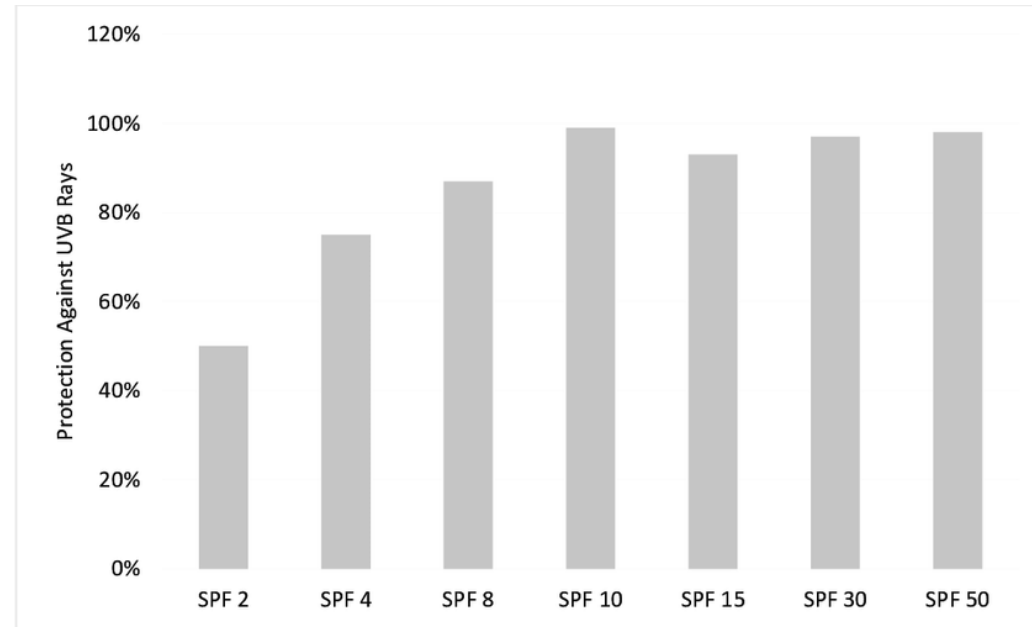
MARKET INTELLIGENCE

# Although... SPF in terms of protection means:

In general, a sunscreen with:

- **SPF 15** blocks 93% of UVB rays
- **SPF 30** blocks 97% of UVB rays
- **SPF 50** blocks 98% of UVB rays
- **SPF 100** blocks 99% of UVB rays

Protection rate of sunscreens with sun protection factor (SPF) from ultraviolet B (UVB) rays.



Anti-aging and Sunscreens: Paradigm Shift in Cosmetics - Scientific Figure on ResearchGate. Available from: [https://www.researchgate.net/figure/Protection-rate-of-sunscreens-with-sun-protection-factor-SPF-from-ultraviolet-B-UVB\\_fig2\\_335522283](https://www.researchgate.net/figure/Protection-rate-of-sunscreens-with-sun-protection-factor-SPF-from-ultraviolet-B-UVB_fig2_335522283) [accessed 2 Apr 2025]

We asked respondents if they were aware that UK recommended minimum SPF is 30

**67%** of respondents were aware that the UK minimum SPF recommended for daily use is SPF 30!



GEN Z **+6%** MORE LIKELY TO BE AWARE at 95%

## Sun safety tips

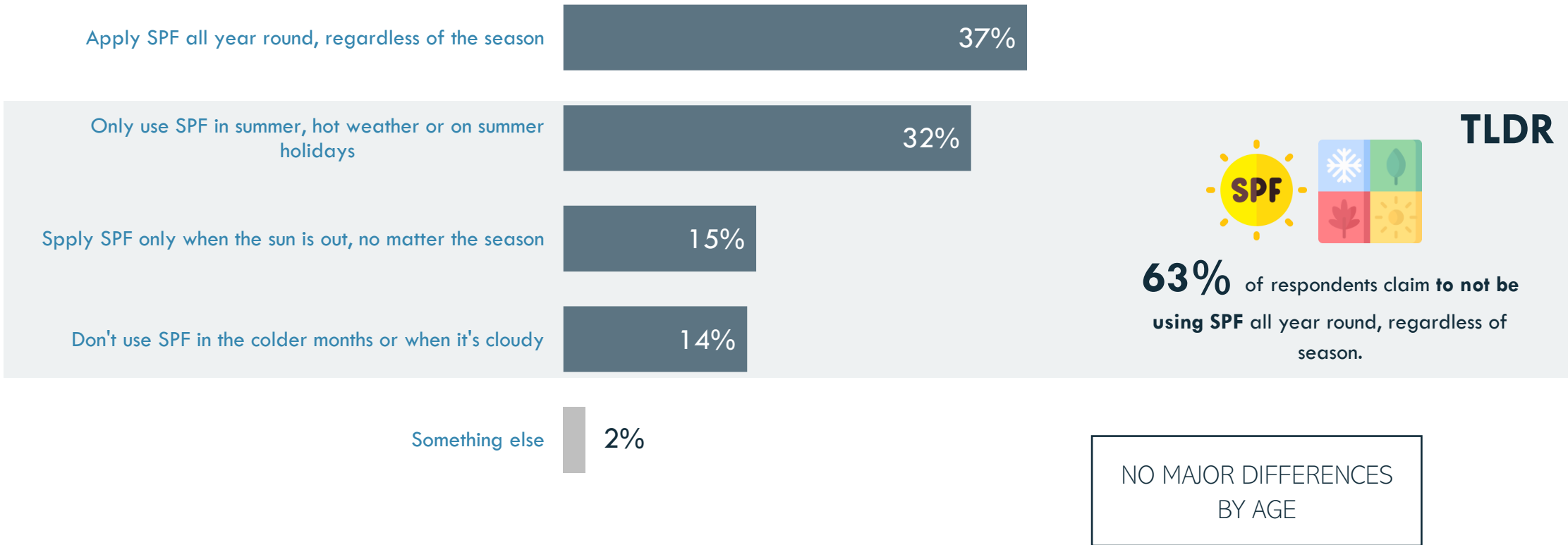
Spend time in the shade when the sun is strongest. In the UK, this is between 11am and 3pm from March to October.

Make sure you:

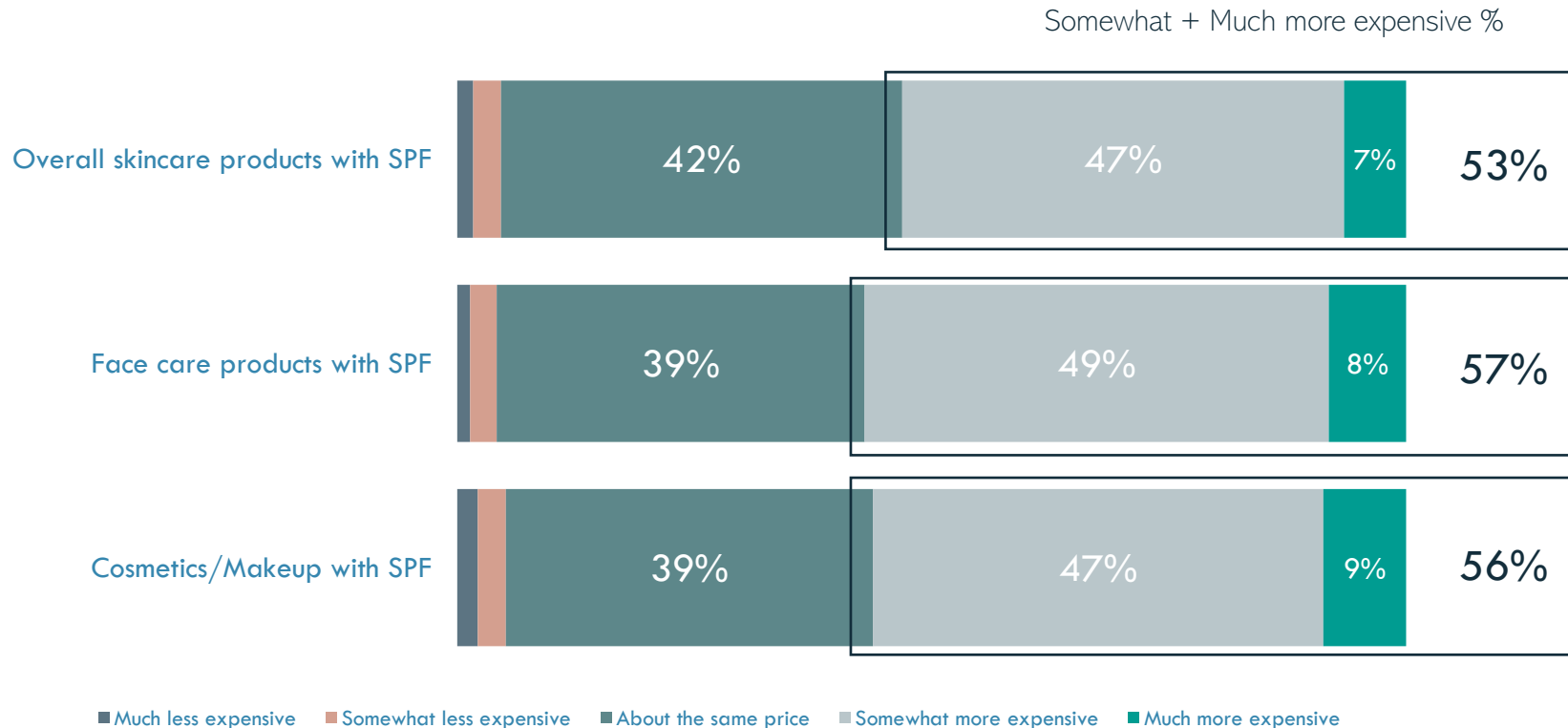
- spend time in the shade between 11am and 3pm
- never burn
- cover up with suitable clothing and sunglasses
- take extra care with children
- use at least factor 30 sunscreen

# SPF CONSUMER SURVEY 2025

To better understand SPF usage, respondents were asked which of the following statements best described their SPF usage throughout the year



## We also found that respondents assumed that beauty products containing SPF are more expensive



SPF CONSUMER SURVEY 2025

## SECTION 3: How to improve knowledge?

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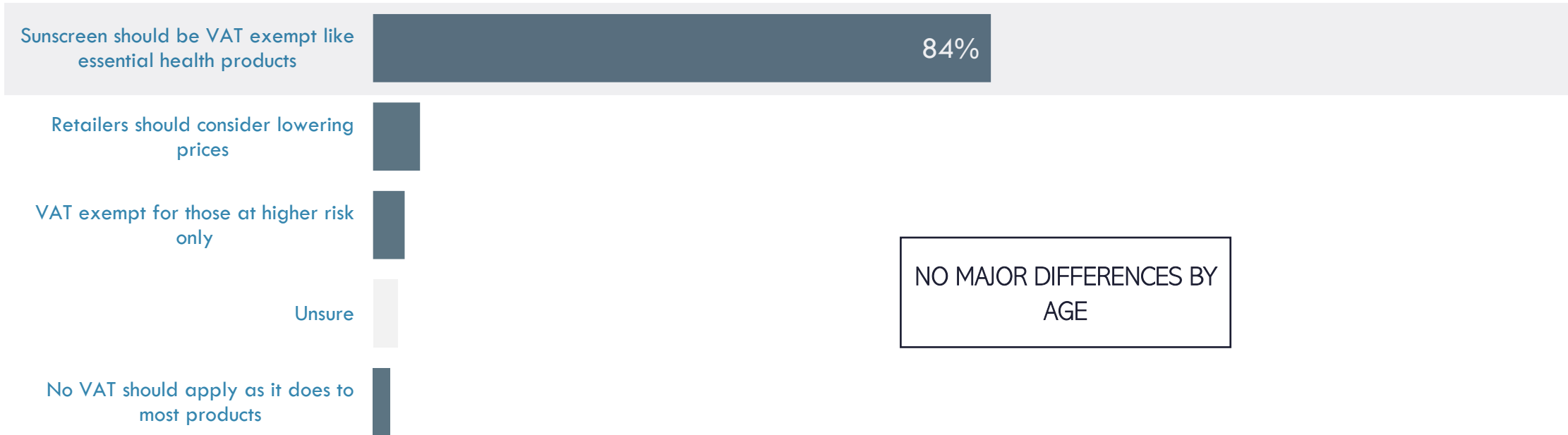
Finally, to wrap up, respondents were asked to provide us with their thoughts on whether the UK government should do more to make SPF products more affordable by abolishing VAT on them and providing more information to plug the knowledge gaps on SPF.

Our findings revealed:

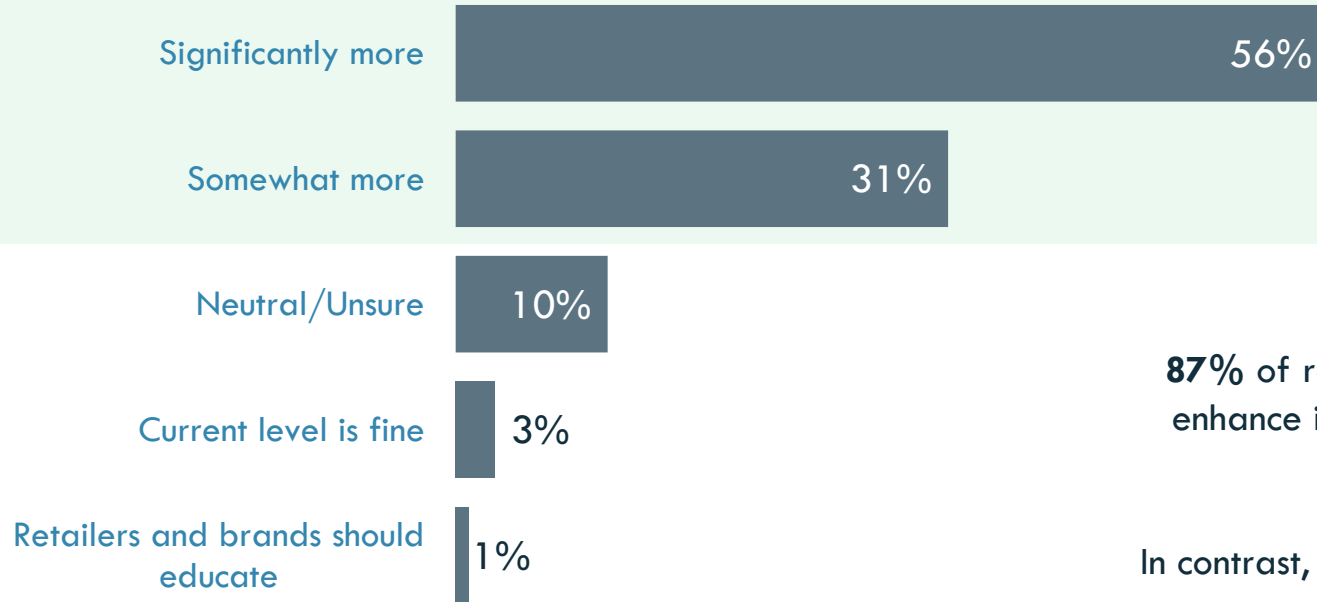
- Around 8 in 10 thought the government should make sunscreen exempt from VAT.
- 9 in 10 stated they felt the government should do more to educate the public about SPF and sun protection.
- Only 13% felt there wasn't a knowledge gap around SPF in the UK



# We asked the question, should Sunscreen be exempt from VAT in the UK? Over in 8 in 10 agreed it should!



# Almost 9 in 10 stated they felt the government should do more to educate the public about SPF and sun protection



NO MAJOR DIFFERENCES BY AGE

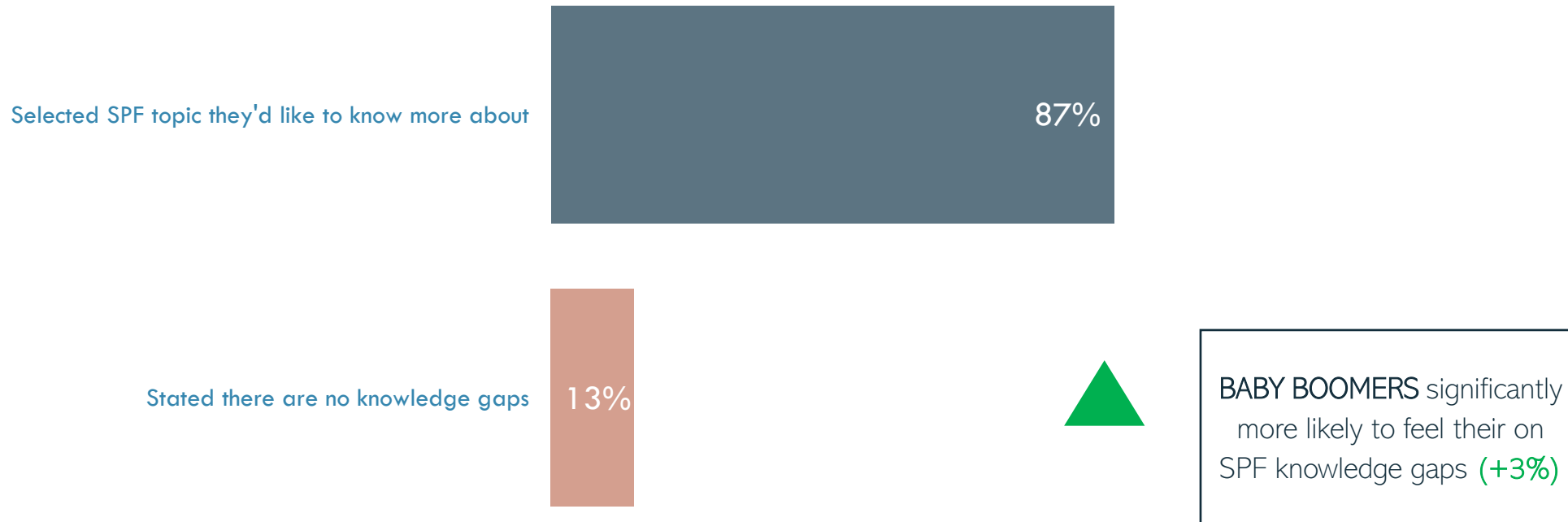
## TLDR

**87%** of respondents believe the government should enhance its efforts to educate the public about SPF awareness.

In contrast, **only 1%** think that this responsibility should rest with retailers and brands.

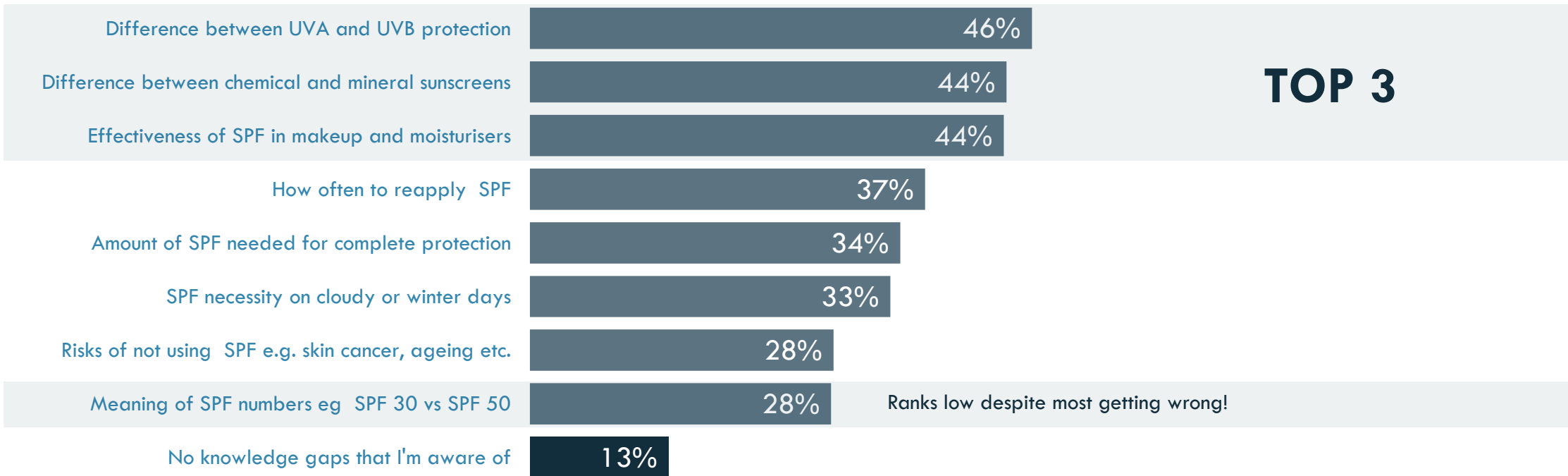
# SPF CONSUMER SURVEY 2025

## That's because only 13% felt there wasn't a knowledge gap around SPF in the UK



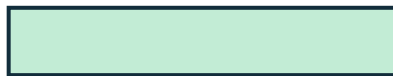
SPF CONSUMER SURVEY 2025

Here is a breakdown of SPF/ sun safety topics that respondents felt that they needed to know more about



## Gen Z respondents showed a greater interest in understanding complete protection and the significance of SPF numbers compared to the overall sample

	Gen Z (Born 1997+)	Millennial (Born 1981-1996)	Gen X (Born 1965-1980)	Baby Boomer (Born 1946-1964)	Grand Total
Difference between UVA and UVB protection	49%	49%	46%	42%	46%
Difference between chemical and mineral sunscreens	46%	41%	47%	44%	44%
Effectiveness of SPF in makeup and moisturisers	47%	42%	45%	42%	44%
How often to reapply SPF	38%	40%	35%	33%	37%
Amount of SPF needed for complete protection	39%	34%	34%	33%	34%
SPF necessity on cloudy or winter days	37%	36%	32%	29%	33%
Risks of not using SPF e.g. skin cancer ageing	29%	29%	28%	26%	28%
Meaning of SPF numbers e.g. SPF 30 vs SPF 50	32%	33%	25%	21%	28%

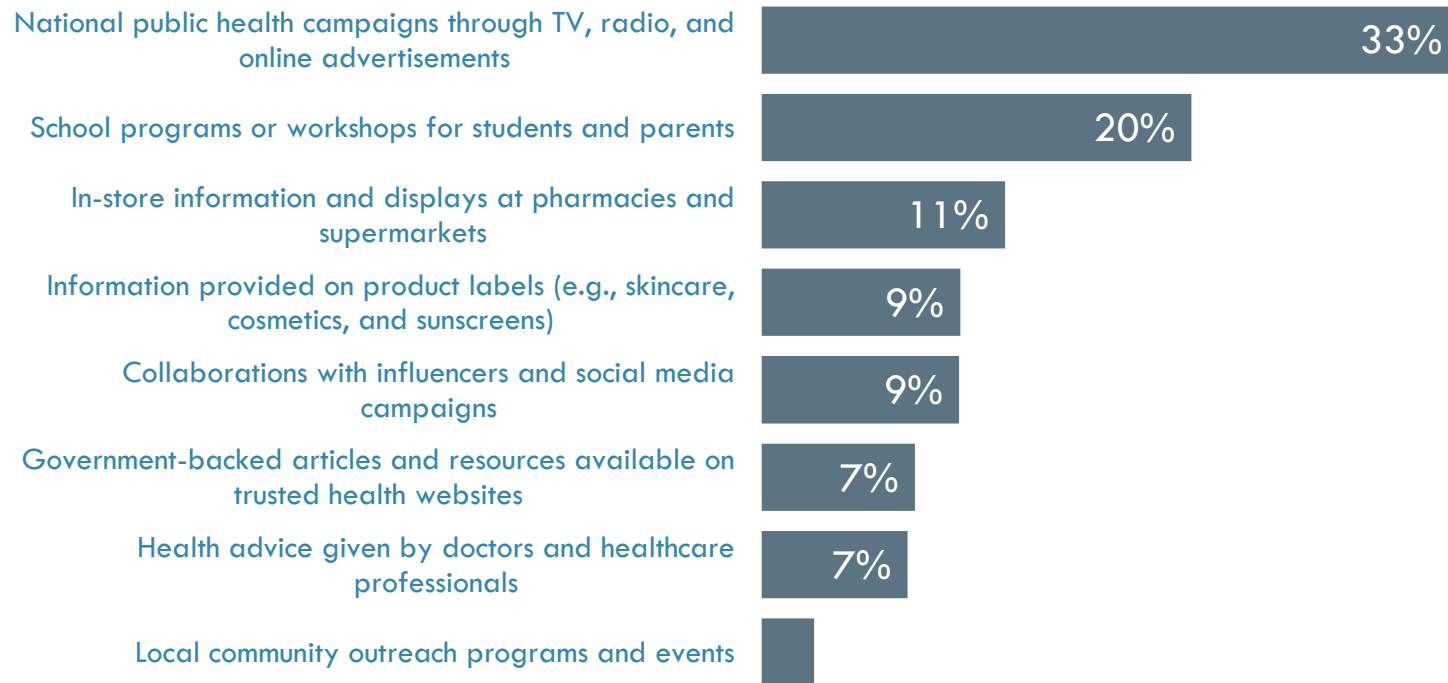


= Significantly more vs Grand Total at 95%



= Significantly less vs Grand Total at 95%

## And finally, we asked what is the right method for the government should educate the UK public on SPF and sun safety



### TLDR



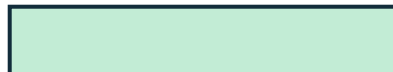
**1 in 3** respondents felt that the government should **educate on SPF and sun health** through **public health campaigns**.

# Public health campaigns were significantly more popular as a method for Gen X and Baby Boomer respondents and less for Gen Z and Millennial

MARKET INTELLIGENCE

COLUMN = 100%

	Gen Z (Born 1997+)	Millennial (Born 1981-1996)	Gen X (Born 1965-1980)	Baby Boomer (Born 1946-1964)	Grand Total
National <b>public health campaigns</b> through TV, radio, and online advertisements	24%	28%	36%	40%	33%
<b>School programs</b> or workshops for students and parents	23%	23%	20%	16%	20%
<b>In-store information</b> and displays at pharmacies and supermarkets	15%	12%	10%	11%	11%
Collaborations with <b>influencers and social media</b> campaigns	7%	10%	9%	10%	9%
<b>Government-backed articles</b> and resources available on trusted health websites	13%	10%	8%	8%	9%
Health advice given by <b>doctors and healthcare professionals</b>	7%	7%	8%	7%	7%
Local <b>community outreach programs</b> and events	8%	7%	7%	7%	7%



= Significantly more vs Grand Total at 95%



= Significantly less vs Grand Total at 95%

## Current UK NHS health campaigns



## Malaga government sun safety campaign (ES)



SPF CONSUMER SURVEY 2025

## SECTION 4: Final conclusions

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With the sun becoming a greater risk in the UK, it is vitally important to educate respondents about the health risks. Although the development of melanoma is a primary concern, this survey has revealed that many beauty shoppers are neglecting their sun health.

Even more alarming is the knowledge gap regarding what SPF numbers mean, particularly among younger generations, who often struggle to provide the correct answers.

More needs to be done to make SPF products affordable and to promote them as essential for health care. Respondents are calling for increased education on this topic.



# Thanks for reading

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For any questions please message:

George Woodhouse – Beauty Market Intelligence Manager

**THG**