

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The color cosmetics category can be complex — the number of products, claims, and the introduction of multitasking formulas can overwhelm even the savviest of make-up users. As a result, women are looking for guidance from a variety of sources including both online and in-store."

> Shannon Romanowski, Senior Beauty and Personal Care Analyst

### This report looks at the following areas:

- Mass market is struggling
- · Multi-benefit products stealing share from foundation, skincare
- Shoppers seek different benefits depending on product, lifestage

The color cosmetics category continues to be a solid performer. The trend-driven nature of the category has led to some sales volatility within segments, as lip cosmetics are currently the strongest performing segment after years of sluggish sales. The inclusion of value-added benefits and a surging prestige market are also benefiting overall category sales.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### **Table of Contents**

### Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

#### **Executive Summary**

#### The market

Figure 1: Total US sales and fan chart forecast of color cosmetics, at current prices, 2009-19

#### Market factors

Figure 2: Use of color cosmetics, by household income, April 2014

### Segment performance

Figure 3: Total US retail sales of color cosmetics, segmented by type, 2012 and 2014

### Key players

Figure 4: MULO sales of the top five mass market color cosmetics companies, rolling 52 weeks 2013 and 2014

### The consumer

### Lip make-up and mascara are most used products

Figure 5: Use of color cosmetics, April 2014

### Women seek long-wearing, lightweight facial cosmetics

Figure 6: Top five benefits sought when selecting facial cosmetics, April 2014

### Volumizing ranks as most important mascara benefit

Figure 7: Top five benefits sought when selecting mascara, total respondents and 18-24 age group, April 2014

### Women want lip products that moisturize and are long-wearing

Figure 8: Top five benefits sought when selecting lip cosmetics, total respondents and 18-24 age group, April 2014

### What we think

### Issues and Insights

### Mass market is struggling

The issues

The implications: Leverage technology, creative retailing Multi-benefit products stealing share from foundation, skincare

The issues

The implications: Offer spectrum of coverage, highlight new usage occasions

Shoppers seek different benefits depending on product, lifestage

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The issues

The implications: Implement targeted marketing efforts, customize product offerings

Trend Application

Trend: Secret, Secret

Trend: Non-Standard society

Trend: Make it Mine

### Market Size and Forecast

### Key points

### Sales and forecast of color cosmetics

Figure 9: Total US sales and forecast of color cosmetics, at current prices, 2009-19

Figure 10: Total US sales and forecast of color cosmetics, at inflation-adjusted prices, 2009-19

### Future looks solid for color cosmetics

Figure 11: Total US sales and fan chart forecast of color cosmetics, at current prices, 2009-19

### Forecast methodology

#### Market Drivers

### Key points

### Wealth disparity benefits both prestige and budget brands

Figure 12: University of Michigan's index of consumer sentiment (ICS), 2007-14

Figure 13: Use of color cosmetics, by household income, April 2014

### Trend-driven nature of category drives market

Technology impacts how women interact with make-up

### Competitive Context

Hybridization of color cosmetics

### Segment Performance

### Key points

### Facial make-up sales remain strong

Lip cosmetics see uptick in growth

### Sales of color cosmetics, by segment

Figure 14: Total US retail sales of color cosmetics, segmented by type, 2012 and 2014

Figure 15: Key purchase measures for color cosmetic products, by household penetration, 52 weeks ending Dec. 30, 2012 (year ago) and Dec. 29, 2013 (current)

### Segment Performance - Facial Cosmetics

### Key points

### Sales are solid for facial cosmetics

### Sales and forecast of facial cosmetics

Figure 16: Total US sales and forecast of facial cosmetics, at current prices, 2009-19

### Segment Performance – Eye Cosmetics

### Key points

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Slow growth expected for eye cosmetics

Sales and forecast of eye cosmetics

Figure 17: Total US sales and forecast of eye cosmetics, at current prices, 2009-19

Segment Performance - Lip Cosmetics

Key points

Lip cosmetic sales are on the rise

Sales and forecast of lip cosmetics

Figure 18: Total US sales and forecast of lip cosmetics, at current prices, 2009-19

Retail Channels

Key points

Sales growth is steady across all retail channels

Sales of color cosmetics, by channel

Figure 19: Total US retail sales of color cosmetics, by channel, 2012 and 2014

Creative retailing plays bigger role in color cosmetics sales

Figure 20: Total US retail sales of color cosmetics, by channel, at current prices, 2009-14

Leading Companies

Key points

Leading color cosmetics companies struggle

Coty Beauty, J&J post strongest gains

Manufacturer sales of color cosmetics

Figure 21: Manufacturer sales of mass market color cosmetics, 2013 and 2014

Brand Share – Facial Cosmetics

Key points

L'Oréal leads segment, but struggles to grow sales

P&G's CoverGirl sees mixed results

Neutrogena posts modest gains

Manufacturer sales of facial cosmetics

Figure 22: Manufacturer sales of mass market facial cosmetics, 2013 and 2014

Brand Share – Eye Cosmetics

Key points

L'Oréal dominates sales, but fails to grow

New products boost sales for CoverGirl

Coty Beauty posts strongest growth in eye cosmetics

Manufacturer sales of eye cosmetics

Figure 23: Manufacturer sales of mass market eye cosmetics, 2013 and 2014

Brand Share – Lip Cosmetics

Key points



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sales declining for segment leaders

Budget brands gaining

Manufacturer sales of lip cosmetics

Figure 24: Manufacturer sales of mass market lip cosmetics, 2013 and 2014

#### Innovations and Innovators

#### New product launch trends

Figure 25: Color cosmetics launches, by share, 2009-14

Figure 26: Top 10 color cosmetic claims, by share, 2009-14

#### Category innovations

Correctors

Innovative packaging

The eyes have it

Eyebrow products

False eyelashes

Long-lasting liner

Multitasking eye make-up

Ombre eye shadow

### Marketing Strategies

### Overview of the brand landscape

### Read my lips

Figure 27: Revlon Super Lustrous lipstick TV ad, December 2013

Figure 28: Maybelline Color Elixir TV ad, November 2013

### Brands go digital

Figure 29: L'Oréal Makeup Genius tutorial, June 2014

Fashion designers take on make-up

### Social Media

### Key points

Market overview

### Key social media metrics

Figure 30: Key performance indicators, selected color cosmetics brands, June 2, 2013-June 1, 2014

### Brand usage and awareness

Figure 31: Brand usage and awareness of color cosmetics brands, April 2014

### Interaction with brands

Figure 32: Interaction with color cosmetics brands, April 2014

### Leading online campaigns

Social media-inspired products

Leveraging social media influencers

Generating online buzz without offering any giveaways

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Hashtag campaigns for good

What we think

#### Online conversations

Figure 33: Online mentions, selected color cosmetics brands, June 2, 2013-June 1, 2014

### Where are people talking about color cosmetics brands?

Figure 34: Mentions by page type, selected color cosmetics brands, June 2, 2013-June 1, 2014

#### What are people talking about online?

Figure 35: Mentions by topic of conversation, selected color cosmetics brands, June 2, 2013-June 1, 2014

### Color Cosmetic Usage

#### Key points

### Lip cosmetics, mascara are make-up essentials

Figure 36: Use of color cosmetics, April 2014

### Facial cosmetic wearers average highest number of products used

Figure 37: Average number of color cosmetic products used, April 2014

Figure 38: Average number of facial cosmetic products used, by age, April 2014

Figure 39: Average number of eye cosmetic products used, by age, April 2014

Figure 40: Average number of lip cosmetic products used, by age, April 2014

### Use of Facial Cosmetics

### Key points

### Foundation and blush are most used facial cosmetics

Figure 41: Any use of facial cosmetics, by age, April 2014

Figure 42: Types of facial cosmetics used, by age, April 2014

### Long-wearing and lightweight formulas important to facial cosmetic users

Figure 43: Benefits sought when selecting facial cosmetics, by ranking, April 2014

Figure 44: Benefits sought when selecting facial cosmetics, any rank, by age, April 2014

### Majority of foundation users turn to liquid format

Figure 45: Types of foundation/concealer used, by age, November 2012-December 2013

### Powder format dominates among blush/bronzer users

Figure 46: Types of blusher/bronzer used, by age, November 2012-December 2013

### CoverGirl is most used facial cosmetic brand

Figure 47: Katy Perry #instaGLAM TV ad, April 2014

Figure 48: Brands of foundation/concealer used, November 2008-December 2013

Figure 49: Brands of blusher/bronzer used, November 2008-December 2013

### Brand use reveals difference in product usage

Figure 50: Facial cosmetic usage by any awareness of color cosmetic brands, April 2014

### Use of Eye Cosmetics

### Key points

Mascara is most used color cosmetic



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 51: Any use of eye cosmetics, by age, April 2014

Figure 52: Types of eye cosmetics used, by age, April 2014

### Eye make-up users want products to stay put

Figure 53: Benefits sought when selecting eye make-up, such as shadow, by ranking, April 2014

Figure 54: Benefits sought when selecting eye make-up such as shadow, any rank, by age, April 2014

### Powders and pencils are most used eye make-up formats

Figure 55: Kinds of eye make-up used, by age, November 2012-December 2013

#### Mascara users seek volume

Figure 56: Benefits sought when selecting mascara, by ranking, April 2014

Figure 57: Benefits sought when selecting mascara, any rank, by age, April 2014

### Occasion likely dictates use of different types of mascara

Figure 58: Kinds of mascara used, by age, November 2012-December 2013

#### CoverGirl and Maybelline are most used eye cosmetic brands

Figure 59: Brands of eye make-up used, November 2008-December 2013

Figure 60: Brands of mascara used, November 2008-December 2013

### Use of Lip Cosmetics

### Key points

### Women rely on a variety of lip products

Figure 61: Any use of lip cosmetics, by age, April 2014

Figure 62: Use of lip cosmetics, by age, April 2014

### Moisturizing and long-wearing are important to users of lip cosmetics

Figure 63: Benefits sought when selecting lip cosmetics, by ranking, April 2014

Figure 64: Benefits sought when selecting lip cosmetics, any rank, by age, April 2014

### Usage remains steady for top three brands, though Burt's Bees is gaining ground

Figure 65: Burt's Bees print ad, 2014

Figure 66: Brands of lipstick and lip gloss used, November 2008-December 2013  $\,$ 

### The Role of Prestige, Mass, and Budget Brands in Product Selection

### Key points

### Color cosmetic users rely on mass brands

Figure 67: Type of brand used when selecting color cosmetics, April 2014

### Women more inclined to turn to prestige brands of facial cosmetics

Figure 68: Type of brand used when selecting facial cosmetics, by age, April 2014

### Mass brands popular choice for mascara users

Figure 69: Type of brand used when selecting eye cosmetics, by age, April 2014

### Lip cosmetics are viewed as lower-risk purchase

Figure 70: Type of brand used when selecting lip cosmetics, by age, April 2014

### Attitudes Toward Multi-benefit Make-up and Kits

### Key points



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Kits and palettes appeal to younger women

### Users of multifunctional make-up want to simplify routine

- Figure 71: Attitudes toward multi-benefit make-up and kits, by age, April 2014
- Figure 72: Attitudes toward multi-benefit make-up, among BB/CC cream users, by age, April 2014

### Race and Hispanic Origin

#### Key points

### Black women below-average users of facial cosmetics

- Figure 73: Types of facial cosmetics used, by race/Hispanic origin, April 2014
- Figure 74: Benefits sought when selecting facial cosmetics, any rank, by race/Hispanic origin, April 2014

### Eye make-up users look for similar benefits, regardless of race

- Figure 75: Types of eye cosmetics used, by race/Hispanic origin, April 2014
- Figure 76: Benefits sought when selecting eye shadow/liner/eyebrow definer, any rank, by race/Hispanic origin, April 2014
- Figure 77: Benefits sought when selecting mascara, any rank, by race/Hispanic origin, April 2014

### Race reveals differences in what benefits are important to lip make-up users

- Figure 78: Types of lip cosmetics used, by race/Hispanic origin, April 2014
- Figure 79: Benefits sought when selecting lip cosmetics, any rank, by race/Hispanic origin, April 2014

### Multicultural women more likely to see benefits to using make-up kits

Figure 80: Attitudes toward multifunctional make-up and kits, by race/Hispanic origin, April 2014

### Appendix - Other Useful Consumer Tables

### Use of facial cosmetics

- Figure 81: Types of facial cosmetics used, by household income, April 2014
- Figure 82: Types of foundation/concealer used, by household income, November 2012-December 2013
- Figure 83: Types of blusher/bronzer used, by household income, November 2012-December 2013
- Figure 84: Brands of foundation/concealer used, by age, November 2012-December 2013
- Figure 85: Brands of blusher/bronzer used, by age, November 2012-December 2013
- Figure 86: Benefits sought when selecting facial cosmetics, any rank, by age and household income, April 2014

### Use of eye cosmetics

- Figure 87: Types of eye cosmetics used, by household income, April 2014
- Figure 88: Brands of eye make-up used, by age, November 2012-December 2013
- Figure 89: Brands of mascara used, by age, November 2012-December 2013
- Figure 90: Benefits sought when selecting eye shadow/liner/eyebrow definer, any rank, by age and household income, April 2014
- Figure 91: Benefits sought when selecting mascara, any rank, by age and household income, April 2014

### Use of lip cosmetics

- Figure 92: Types of lip cosmetics used, by household income, April 2014
- Figure 93: Brands of lipstick and lip gloss used, by age, November 2012-December 2013
- Figure 94: Benefits sought when selecting lip cosmetics, any rank, by age and household income, April 2014

### The role of prestige, mass, and budget brands in product selection

- Figure 95: Type of brand used when selecting facial cosmetics, by race/Hispanic origin, April 2014
- Figure 96: Type of brand used when selecting facial cosmetics, by age and household income, April 2014

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 97: Type of brand used when selecting eye cosmetics, by race/Hispanic origin, April 2014

Figure 98: Type of brand used when selecting eye cosmetics, by age and household income, April 2014

Figure 99: Type of brand used when selecting lip cosmetics, by race/Hispanic origin, April 2014

Figure 100: Type of brand used when selecting lip cosmetics, by age and household income, April 2014

### Attitudes toward multifunctional make-up and kits

Figure 101: Attitudes toward multifunctional make-up and kits, by age and household income, April 2014

### Appendix - Social Media

#### Online conversations

Figure 102: Online mentions, selected color cosmetics brands, June 2, 2013-June 1, 2014

### Brand analysis

Figure 103: CoverGirl key social media indicators, June 2014

Figure 104: NARS key social media indicators, June 2014

Figure 105: Clinique key social media indicators, June 2014

Figure 106: Rimmel key social media indicators, June 2014

Figure 107: Avon key social media indicators, June 2014

Figure 108: Benefit key social media indicators, June 2014

#### Brand usage or awareness

Figure 109: Brand usage or awareness, April 2014

Figure 110: Benefit usage or awareness, by demographics, April 2014

Figure 111: NARS usage or awareness, by demographics, April 2014

Figure 112: CoverGirl usage or awareness, by demographics, April 2014

Figure 113: Rimmel usage or awareness, by demographics, April 2014

Figure 114: Clinique usage or awareness, by demographics, April 2014

Figure 115: Avon usage or awareness, by demographics, April 2014

### Activities done

Figure 116: Any Brand - Activities done - I have looked up/talked about this brand online on social media, by demographics, April

Figure 117: Any Brand – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, April 2014

### Interaction with brands

Figure 118: Activities done, April 2014

Figure 119: Any Brand - Activities done - I have looked up/talked about this brand online on social media, by demographics, April

Figure 120: Any Brand – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, April 2014

Appendix – Information Resources Inc. Builders Panel Data Definitions

### Information Resources Inc. Consumer Network Metrics

Appendix - Trade Associations

