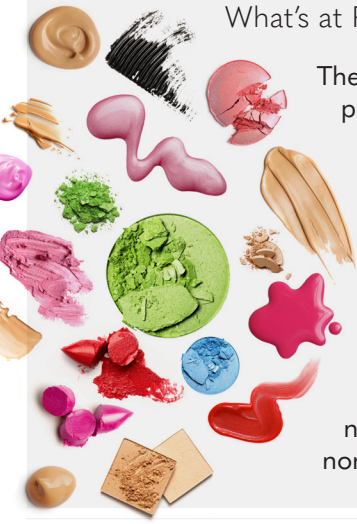


Curious About Color:

What's at Play in 2020's Color Cosmetics Market



The color cosmetics market was experiencing a downturn pre-pandemic that has been exacerbated by stay-at-home orders and our new COVID-19 reality. **Now expected to decline 7% in 2020, this market will likely not begin recovery until 2022.** However, to simply paint this as a negative story would be to miss the **nuances and unique changes** happening within this industry. Makeup is **intrinsically tied to emotion** for many female consumers, and offers the chance for a bit of fun during a stressful time. Brands should continue focusing on products that multi-task and enhance natural beauty, while creating moments of both normalcy (through routine) and frivolity.

ASSESSING THE SEGMENTS

- Facial makeup is expected to see a **13.4% sales decrease** in 2020



- The lip segment is predicted to fall 12.2%
- Eye makeup, understandably, will suffer the least, with a 6.6% drop



WFH LOOKS DIFFER GENERATIONALLY

- 51% of 18-24-year-olds wear makeup even when at home**
- Compare that with **67% of all women who do not wear makeup when only at home**
- Younger generations—accustomed to constantly performing via social media—show higher engagement and excitement, even when stuck at home



GO FOR THE GLOW

- 58%** of female consumers agree that their everyday makeup routine **enhances their natural look**
- The dewy looks inspired by Instagram and VSCO girls are still very much in favor
- In 2020, a “healthy” look feels appropriate, elevated, and on-trend



COLOR MEANS CONFIDENCE

- 46% of women say that their everyday makeup routine gives them confidence**, proving the **high emotional value** of color cosmetics
- This suggests that though **skincare will remain dominant**, positive emotions around makeup will drive the recovery



KEEP IT CLEANER THAN EVER

- 31% of Gen Z is concerned that ingredients** in makeup are **bad for their health**, compared with 22% of all women who feel that way
- As a result of the pandemic, **68%** of our research community reports that they **are looking more closely at ingredients and where products are made**



BECAUSE OF COVID-19...

- 14%** of women are **watching more makeup tutorials**; 20% are watching the same amount
- 37% are wearing about the same amount of makeup, while **55% are wearing less makeup**
- 12% are reading more product reviews**; 29% are consuming about the same amount of reviews

WHAT WE SEE IN SEARCH

- The lip segment will likely continue suffering as consumers don masks, but lip gloss is still the on-video favorite; through the last week of July, there are **+20,000 more searches for lip gloss products than LY**
- Lip treatments** show the next greatest increase, with +13,000 more searches than LY
- Eyebrow products** are the third favorite, with +7,500 more searches than LY

