Marching Into Makeup Madness!

When it comes to makeup, today's beauty consumers are in LOVE with their color cosmetics and routines. From how often she purchases to where she shops to her favorite brands and even how many eyeshadow colors she owns (a lot!). TBC asked consumers to open up their makeup bags and tell us everything—and did they ever. With responses from 7,000+ US beauty consumers, everything you could ever want to know about your makeup consumer is here!

The one product she can't live without

Now (2019) vs. 1. Mascara

- **2.** Foundation
- **3.** Lipstick
- **Then** (2015)
 - **1.** Lipstick
 - 2. Mascara
 - **3.** Her entire makeup bag!

Makeup Basics

- 99% have purchased skin, color, and hair products in past year
- **61%** wear makeup everyday
- 60% say they LOVE makeup
- And one quarter of women won't leave home without their makeup bags!

The Trendiest Of Makeup Trends:

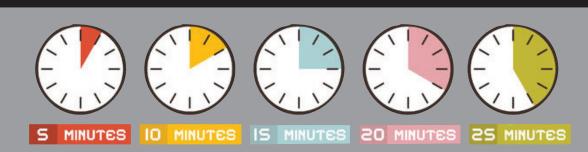
Now (2019) VS.

Then (2015)

- **1.** Natural shaped eyebrows/bold brows
- 1. Soft neutral lips
- **2.** Glowing, radiant dewy skin
- **2.** Lip gloss/shine

Why She Doesn't Wear Makeup

- 45% feel they look just fine 'as-is' and don't need it
- **31%** say it's not necessary everyday
- 23% feel it just takes too long to apply
- **3.** Glossy lip/wet looking lips
- 3. Contoured cheeks
- 18% makeup is only for special occasions



She takes her time

- 14% spend more than 30 minutes putting on her makeup
- **19%** spend between 21-30 minutes
- 35% spend between 11 and 20 minutes

Color Cosmetics She Uses Regularly Todav vs. in 2015

2019	2015
89% Mascara	86% Eye shadow
76% Eye shadow	66% Mascara
71% Liquid foundation	50% Foundation
68% Concealer	52% Eye Liner
67% Blush	49% Lip Gloss
62% Lipstick	

Makeup Products She **Using The Least?**

- Lip primer (15%)
- Brow pomade (15%)
- False lashes (15%)
- Stick foundation (16%)
- Mascara primer (16%)



She Purchases How Often?

Product	Never	Weekly	A Few Times a Month	Monthly	Every 3 Mos.	Every 6 Mos.	Once a Year
Eyeshadow Palettes	6%	5%	7%	16%	27%	21%	18%
Eyeshadow Singles	18%	5%	7%	13%	21%	19%	17%
Eyeliner	7%	6%	9%	23%	29%	17%	10%
Brow Products	20%	5%	6%	15%	26%	17%	10%

Mascara	2%	6%	9%	27%	37%	14%	5%	
False Lashes/ Extensions	53%	4%	5%	7%	7%	10%	14%	

What is important to her when making a beauty decision is mostly the same, but animal testing and convenience are new to her list.

2019 2015 Color choice/color I like or Color choice/color I like or matches my skin tone matches my skin tone Color stay Color stay Easy to apply Easy to apply cruelty free Price Price No animal testing/brand | recognize Had added benefits Has added benefits (i.e. SPF or anti-aging) Is a brand I recognize Made with natural ingredients Made with natural ingredients 100% natural/organic ingredients Packaging small enough to grab & go (i.e. purse/cosmetics bag)

Eyeshadow BFFS:

Urban Decay, Loreal, E.L.F., CoverGirl, Anastasia, MAC, Maybelline, Morphe, Tarte, Ulta and Sephora (no particular order)

Favorite mascara brands:

Benefit, Clinique, CoverGirl, Kat Von D, IT Cosmetics, L'Oreal, MAC, Maybelline, Tarte, Too Faced, Urban Decay *(no particular order)*



Oh Those Lips

- 45% purchase makeup for their lips at least once monthly
- **32%** own more than 16 different lipsticks
- Colors she purchases

The Perfect Canvas

- 28% purchase new foundation at least once per month
- 27% purchase foundation made for ethnic skin tones

What she's using

The Eyes Have It

Top three eye products she buys at least once monthly:

- 41% Mascara
- 37% Eyeliner
- **28%** Eye shadow palettes

Where she's buying her eye products:

- 47% Ulta
- 41% Sephora
- 33% Drugstore
- 28% Walmart

most regularly:

- 59% nudes
- **52%** pinks
- 42% berries
- 33% reds

Where she's buying her lip color:

- 40% ULTA
- 36% Sephora
- **31%** Drugstore
- 28% Walmart
- 81% liquid
- 37% compact/powder
- **22%** tinted moisturizer
- 18% compact/cream
- **18%** contouring products

Where she's buying her foundation products

- 41% Ulta
- 36% Sephora
- 28% Walmart
- 28% Drugstore

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Beauty & Personal Care Consumer Research

Data based on an original survey of 7,977 US beauty consumers aged 18+, conducted in February 2019. (Select data benchmarked from a similar study TBC conducted 4 years ago)