

FROM LASHES TO LIDS

With ever-changing trends in lid color, the proliferation of new lash and brow products, and the desire to make eyes pop, the eye makeup category is expected to grow nearly 6% year over year. In this Beauty by the Numbers™, TBC explores the US beauty buyers' lash, brow, shadow and mascara must-haves. Not only are US female consumers buying both lash and brow products more often than they did than five years ago, but the spend per transaction on products and services is up as well. What's fueling this growth besides her obsession with all things beauty? Celebrity looks, the desire for cleaner products, and tips and tricks as seen on social media. Where does your brand fit into her picture-perfect makeup bag?

73% of female beauty buyers have purchased **both** eyelash and eyebrow products or tools in the past 12 months (up from **66%** five years ago)

She Wears Eye Makeup

- **43%** Every day
- **27%** 5-6x per week
- **20%** 3-4x per week



BRAND OPPORTUNITY She's Tracking Trends Here

All Respondents	Gen Z-specific
46% YouTube and other bloggers	72% TikTok
45% Instagram	62% Instagram
42% Beauty specialty stores (Sephora, Ulta)	60% YouTube and other bloggers
35% TikTok	38% Beauty specialty stores (Sephora, Ulta)

What's In

Lashes

- **94%** Voluminous lashes
- **78%** Natural lashes
- **77%** Intense black mascara

Brows

- **88%** Natural brows
- **61%** Fluffy/bushy brows
- **34%** Thick eyebrow arch (#1 preferred shape)

Lids & Looks

- **91%** Neutral lids
- **55%** Iridescent shimmery lids
- **44%** Cat eyes



Lash Purchases in Past 12 Months

- **96%** Mascara
- **50%** Lash curler
- **48%** Eyelash makeup remover
- **41%** False eyelashes
- **36%** Lash serum

Fav Mascara Formulas

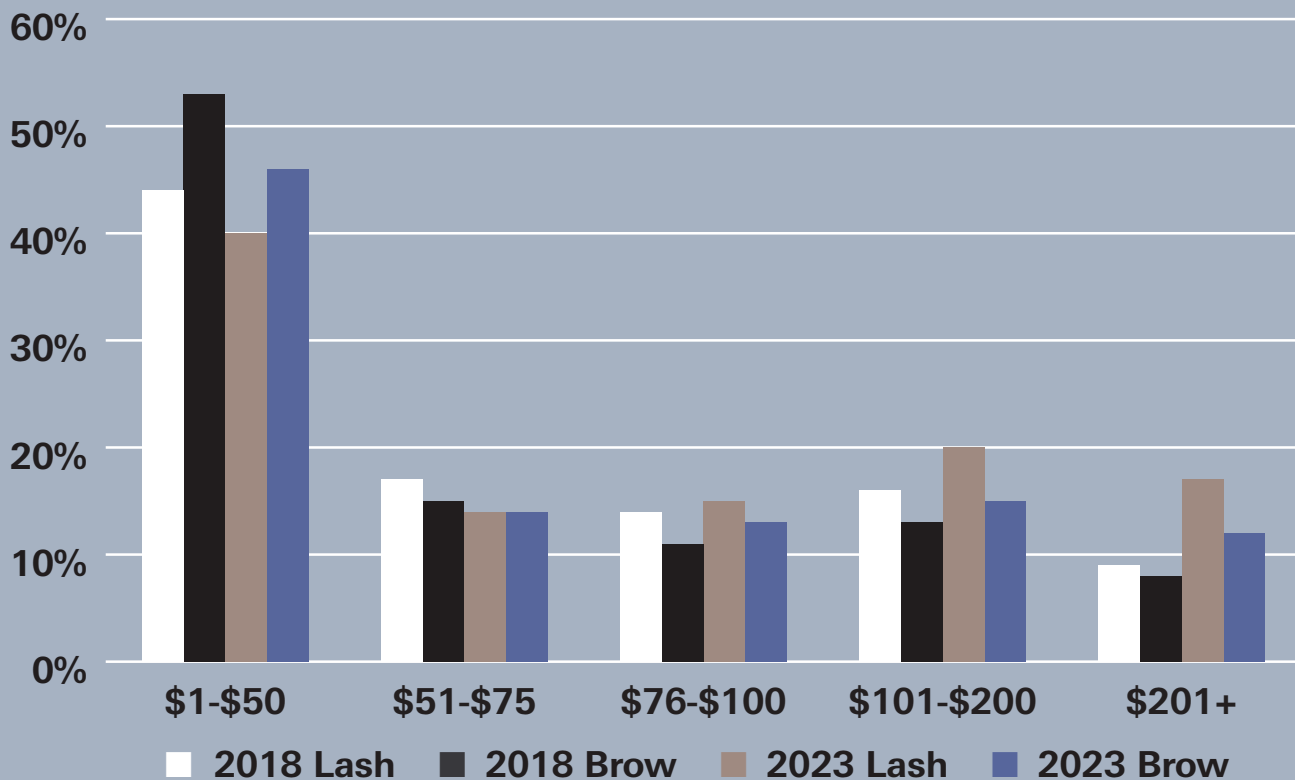
- **81%** Lengthening
- **81%** Volumizing
- **60%** Non-clumping
- **59%** Thickening
- **56%** Waterproof



Where She Shops for Lash, Shadow & Brow Products

- **61%** Ulta
- **60%** Superstore (i.e., Target/Walmart)
- **54%** Sephora
- **49%** Amazon.com
- **42%** Drug store

She's Spending More Yearly on Lash & Brow Products and Services in 2023 vs. 2018



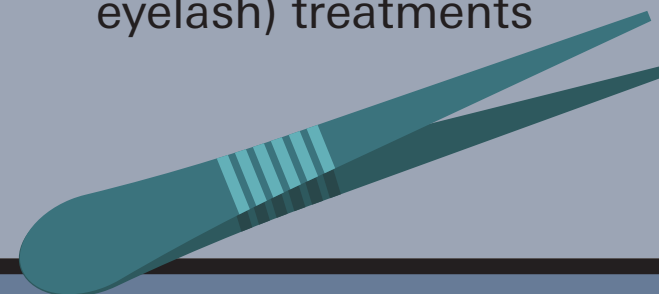
Brow Purchases in the Past 12 Months

- **80%** Brow pencil
- **66%** Tweezers
- **55%** Brow brush
- **55%** Brow gel
- **28%** Brow powder

When purchasing an eyebrow product or service, **75%** say **color matching** is most important.

Her Brow DIY

- **77%** Brow tweezing
- **65%** Brow shaping
- **58%** Brow trimming
- **42%** Don't get professional eyebrow (or eyelash) treatments



Other Eye Makeup She Wears

- **72%** Powder or cream eye shadow in palette
- **69%** Pencil eyeliner
- **64%** Eye shadow
- **53%** Eye primer
- **50%** Liquid eyeliner

Eye Makeup Brands on Her Radar

- **83%** Maybelline
- **83%** CoverGirl
- **78%** Clinique
- **77%** bareMinerals
- **75%** MAC
- **74%** Lancôme

What She Says

- Biggest False Lashes/ Extension Issue – *Hard to apply them myself*
- Favorite Eyelash Product – *Too Faced Better Than Sex Mascara*
- Favorite Brow Product – *Anastasia Beverly Hills Brow Pomade*
- Natural brows are **IN**, Thin or bleached brows are **OUT**
- Voluminous eyelashes are **IN**, Mascara on the bottom lashes only is **OUT**
- Kim Kardashian has the best lashes and brows



Let's Talk Eyeshadow!

Eyeshadow Colors/Types She Wears

- **80%** Browns
- **75%** Mauves/Natural
- **56%** Matte

Shadow Packaging She's Buying

- **83%** Palette
- **53%** Individual color in powder, stick, cream form
- **10%** Replacements for her palette

She's Buying Eye Shadow Marketed as...

- **62%** Cruelty-free
- **47%** Long wear
- **42%** Non-toxic
- **41%** Made in USA

What's Important in Her Eye Shadow Palette

- **96%** Applies evenly/Blends seamlessly (*tied*)
- **93%** Compliments my skin tone/Color (*tied*)
- **90%** Compliments my eyes

Interested in customized beauty consumer research for your brand? Call 703.871.5300 or visit benchmarkingcompany.com or info@benchmarkingcompany.com for information on Beauty/Personal Care Product Testing and specialized consumer research.