

Marketing Trends in Color Cosmetics

Expect brands to pivot their focus to online lifestyles and disrupt the makeup paradigm by further hybridising products and transcending existing territories.



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May 2021

Color Cosmetics in perspective

01

Where we are now

The COVID-19 crisis strongly hit the makeup industry as consumers focused on **care over appearance**, forcing brands to renovate existing strategies to survive. Through **further hybridizing with skincare** and calling out claims linked to **indoor lifestyles**, brands can pivot their makeup offer to respond to shifting lifestyles and attitudes.

02

Short to medium term (until December 2021)

We expect uplifted sales for brands that adopt a **more minimalist approach to beauty**, resonating with consumers' new lifestyles and motivating purchase. Strategies that cater for **online lifestyles**, such as NPD in shades to be elevated on-screen will spark an upturn in sales and engagement.

03

Long term (2022-2025)

Predictions anticipate the **post-COVID-19 world to be full of celebration**, with existing social boundaries and beliefs broken down further. Makeup brands are strongly placed to adapt to subsequent growing demand for products that allow consumers to **express new identities** and creativity through total, **unrestricted freedom of use**.

WHERE WE ARE NOW



At-home based lifestyles impact on the use of cosmetics

Brazilian consumers demonstrate a more minimalistic approach on their at-home centered routines during the COVID-19 pandemic.

BRAZIL

20%

of Brazilian consumers who are employed and work everyday from home are wearing nail polish less frequently during the COVID-19 pandemic

CHILE

63%

of female Chilean consumers aged 25-34 are wearing less makeup and/or coverage products since the start of the pandemic

MEXICO

19%

of Mexican adults intend to wear makeup and/or coverage products to go out

Base: Brazil: 1,500 internet users aged 16+; Chile: 1,000 internet users aged 18+;

Source: Lightspeed/Mintel; Offerwise/Mintel



'Beneath-the-mask' base/lip makeup stresses the durable and transfer- or smudge-proof

In lip and face makeup, factoring in the wearing of face masks are long-lasting, mattifying, oil-free and transfer- and sweat-proof claims, notably rising in the LATAM region.



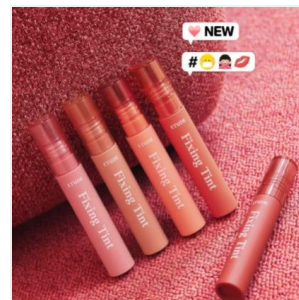
24h comfort duration

Avon's [Power Stay Base Líquida 24 Horas de Duração](#) is said to last for up to 24 hours leaving a fresh and matte look by totally covering imperfections, thanks to Comfortlast technology that offers sweat- and humidity-proof benefits (Brazil).



Lip tint formulas promise transfer-proof benefits

[Ruby Rose Gel Tint](#) is positioned as transfer-proof, versatile (can also be used to give a flushed appearance on cheeks), durable (lasting all day long) and hydrating (with its hyaluronic acid and d-panthenol formula) (Brazil).



Fixing tint, mask-proof

Etude House's [Fixing Tint](#) is a hydrating lip tint positioned as 'mask-proof', yet delivering weightless and comfy feeling on lips, after a 'no mask transfer test' which promises 6 hours mask transfer prevention (South Korea).

Hybrid makeup can attend consumers' new concern over 'maskne'

As 26% of Brazilians have experienced acne during COVID-19 pandemic, makeup brands can leverage the use of facial color cosmetics by bridging the gap between skincare and make-up.



Facial primer

Primers often blur with skincare; a recent launch also taps into anti-maskne skincare trends. [Peach & Lily Skin Shield Blurring Primer](#) protects against mask-induced acne in addition to pollution, excessive phone time, internal stress etc (US).



Loose powder

The Erha 21 Acne Care Lab skincare collection also includes [Pressed Powder](#), which absorbs excess oil while helping to prevent acne due to its antibacterial properties (Indonesia).



Liquid foundation

When Life Gives You Lemons [Hi-Function Foundation](#) is designed to act against hyper-pigmentation, oiliness and acne scars, being formulated with niacinamide and a blend of nine botanical adaptogens for acne that support the skin's natural ability to bounce back from stress (US).

Brands focus 'above the mask' and hone in on eyes



For when chilling at home or when going out

[Morphe x Madison Beer Channel Surfing Artistry Palette](#), part of a curated range from musical artist Madison Beer, features soft glam neutrals/rose gold shades and is suitable for any occasion, including 'chill everyday in' time.



Magical collaboration with Disney Fairytale Books

[I Heart Revolution Disney Fairytale Books](#) 'for modern day princesses' reveals looks of fairytale characters Cinderella, Tiana (*The Princess & the Frog*) and Belle (*Beauty and the Beast*). Includes matte/shimmer eyeshadow and faux mink lashes.



Dewy makeup trends move to eyebrows
M·A·C Cosmetics' [Underground](#) small-batch model (in quantities of 1,000 for loyal M·A·C 'insiders') includes [Fresh-Out-Of-The-Shower Brow Gel](#), a clear gel to reveal fresh-faced dewy, fluffy and naturally groomed brows.

Health- and wellness-related benefits resonate amidst the pandemic

Mintel's [Trend Driver Wellbeing](#) and its underlying pillars *Physical* and *Psychological* states how consumers are increasingly implementing lifestyle behavior choices to ensure a 'total wellbeing' concept in their routines.

BRAZIL

57%

of Brazilian consumers would be interested in beauty products with ingredients that strengthen their immune system (eg probiotics, vitamins)

MEXICO

47%

of Mexican consumers would be interested in BPC products that help them relax

PERU

28%

of consumers in Peru would be interested in BPC products that improve their quality of sleep

Base: Brazil: 1,500 internet users aged 16+; Mexico: 1,000 internet users aged 18+; Peru: 1,000 internet users aged 18+

Source: Lightspeed/Mintel; Offerwise/Mintel



Use probiotics to promote skin health



[Soon+ Probiotics Mmune Biome Powder](#)
(South Korea)



[Max Factor Miracle Second Skin Hybrid Foundation SPF 20](#) (UK)

Inside-out beauty ingredients pre- and probiotics are progressing slowly in the color cosmetics category.

Soon+ Probiotics Mmune's loose powder is formulated with **fermented probiotics** that protect the skin from the **external stimuli** and also makes it smoother.

Max Factor Miracle's foundation is infused with a **pre/pro-biotic complex**, to help skin's **natural defenses**, and naturally-derived coconut milk, for all-day moisturization.

Explore melatonin for its holistic benefits

Borrow ingredients from VMS that boast topical benefits, like melatonin.

While topical melatonin doesn't have sleeping aid properties, its resonance in consumers who know it as a sleeping aid will help promote mental health benefits in makeup products and **propel mood beauty in the makeup category.**

Melatonin raises interest in skincare and can be promoted in makeup thanks to its benefits including **skin brightening** and **defense against free radicals.**



[Milk Makeup Melatonin Overnight Lip Mask](#) infused with melatonin and berry blend of antioxidant actives



[Faded Brightening & Clearing Gel](#) with melatonin against free radicals

Wellness-focused innovations use an array of approaches



Supports mental health and targets loneliness

Selena Gomez's [Rare Beauty](#) makeup brand is committed to supporting mental health charities/organisations and addressing chronic loneliness; its Rare Impact Fund has a goal of raising \$100m over the next 10 years (US).



Uplifting palette inspired by Animal Crossing game

[Colourpop x Animal Crossing: New Horizons](#) (eyeshadow, blush, lip colour etc) is inspired by the Nintendo game that was a hit during 2020 COVID-19 lockdowns. It features uplifting shades as seen in the colourful world of *Animal Crossing* (US).



Impactful packs with wellness slogans
Design-led clothing/stationery store Thence has teamed up with makeup brand Lilybyred. The [Lilybyred Thence](#) line uses retro/bold designs/colours with on-pack mood-boosting slogans ('today is your day', 'happiness everywhere every moment') (Singapore).

Mask-mouth can extend to preventative and corrective lip care

As mask-wearing seems to be on its way to becoming a part of life for the foreseeable future, so brands need to **re-think lip care as a category** and **shift focus from color towards preventative and corrective lip care**.

As color sales show decline, skin conditions have increased, and this presents brands with unique opportunities to offer consumers claims such as **'long-lasting' for skin protection**, as well as corrective micro-claims such as anti-fungal with microbiome function to support the ongoing issue of mask-wearing and the increase in **'mask-mouth' symptoms**.

Base: Brazil:1,500 internet users aged 16+

Source: Lightspeed/Mintel; Mintel's COVID-19 Update - Brazil - March 16-April 2, 2021

FACE MASKS

85%

of Brazilians reported wearing a face mask in public.

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Innovations add new hygienic and convenient ways for lip care

Brands are moving towards more innovative, hygienic and convenient ways of delivering product to the lips.



Twist-up lid for hygiene

[Florence by Mills Oh Whale! Lip Balm](#) has a vegan formula and a clever twist-up dispenser - making it a perfect product for sharing hygienically.



Airless and natural

[HiPi Faible Fresh Vanilla & Manuka Honey Natural Airless Lip Balm](#) contains organic lanolin and natural ingredients in a hygienic, airless dispenser.



Lip care goes pop!

[Burt's Bees Pop Grip Lips Set](#) features a lip balm compact, refill and a phone grip & stand. The balm sits within the phone pop grip lid and contains 100% natural origin ingredients.

IN THE NEXT TWO YEARS



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Minimalist routines will help cater for conscious lifestyles

Mintel's 2021 BPC Trend [Beauty \[Re\]Valued](#) shows how beauty brands that bring value beyond cost - by emphasizing quality, convenience and [consciousness](#) - will thrive in the next normal.

BRAZIL

35%

of Brazilians agree that nail color national brands are just as good as international brands

COLOMBIA

47%

of Colombian consumers would be willing to spend more on a beauty or grooming product that contains premium ingredients

BRAZIL

48%

of Brazilians[^] have done their nails less with professionals in order to save money

Base: Brazil: 1,500 internet users aged 16+; Colombia: 1,000 internet users aged 18+; [^]Brazil: 1,080 internet users aged 16+ who have done their nails in the past 12 months

Source: Lightspeed/Mintel; Offerwise/Mintel

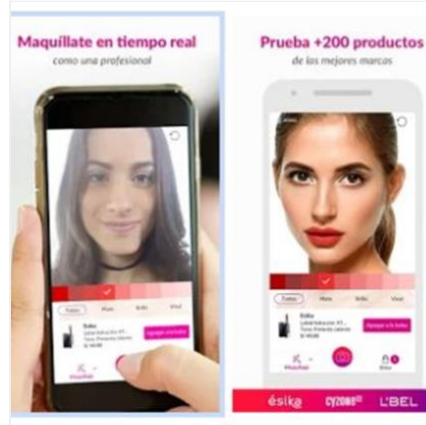


Brands can support budget-conscious consumers



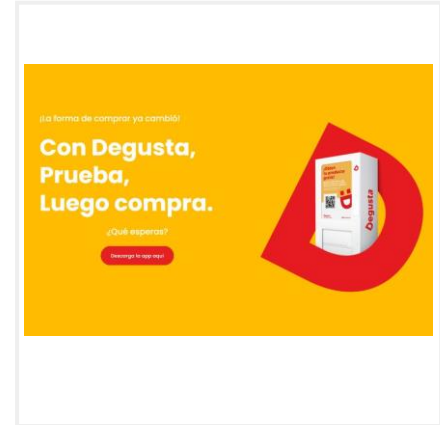
Mistake-proof at home

[Sally Hansen Hard As Nail French Manicure Kit](#) contains manicure and pedicure nail tip guides for mistake-proof results at home (Chile, imported from US).



Experience before purchase

Esika's [Asesor de Belleza](#) app offers virtual make-up so consumers can try the new line of Resist lipsticks (Colombia)



Sampling machines

[Degusta's](#) sampling machine enables consumers to try new product launches for free, answer a short survey and scan a QR code (Peru).

Digital-friendly colors will lead innovation

Looking good on screen gained importance as consumers are staying more at home - a lifestyle shift that will endure in the post-COVID-19 era

CHILE

49%

of Chilean adults have played online games (eg e-sports, social-network online games)

MEXICO

54%

of Mexicans used a new way to connect with/keep in touch with friends/family (eg video conferences, virtual events)

BRAZIL

35%

of Brazilian male consumers which study and work are interested in products to cover skin's imperfections.

Base: Chile: 1,000 internet users aged 18+; Mexico: 1,000 internet users aged 18+; Brazil: 444 male internet users aged 16+ who work and study

Source: Offerwise/Mintel Lightspeed/Mintel



More online demands solutions for at-home looks



Instant filter

[Hourglass Ambient Lighting Palette - Volume II](#) reproduces the multi-dimensional glow obtained when under universally flattering light sources. It is said to act as an instant filter (US).



Digital makeup for videoconferences

[L'Oréal's Signature Faces](#) virtual makeup line for video calls boasts possibilities in colours and finishes that are broader than what can be achieved by real-life products (World).



Digital garments

In the fashion industry, [Auroboros](#) sells 'digital' couture. Customers buy digital garments that are layered on their chosen pictures, making it a less wasteful and more affordable way for consumers to access high-end fashion for social media content only (UK).

IN THE NEXT FIVE YEARS - AND
BEYOND!



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WHY IT IS IMPORTANT

The relationship with surroundings has shifted, forcing people to re-evaluate purchase priorities with eco-ethical considerations driving more conscious purchases.

PERU

23%

of Peruvian consumers became more interested in the ethical practices of the BPC brands they use during the pandemic.

MEXICO

25%

of Mexican consumers started using local BPC brands that they didn't before during the pandemic.

BRAZIL

86%

of Brazilian consumers would like to see more innovative sustainability ideas from big beauty brands (eg L'Oréal).

Clean, eco-conscious claims will be at the forefront of the new nude

As discussed in Mintel's 2021 BPC Trend [Beauty Eco-lution](#), brands that reinforce the caring value of their products (eg to the skin/planet) are expected to retain customers.



Focus on naturally derived ingredients
[Typology Teint Tinted Serum](#) is made of 99% naturally derived ingredients and showcases a high score on Yuka.



Complement to clean skincare
[Bybi Babe Balm Bronze](#) is a multi-use golden highlighting balm complementing Bybi's clean, eco-conscious skincare offer.



No-plastic mascara brush
[La Bouche Rouge Le Sérum Noir Mascara](#)'s brush is made of castor plant fibres instead of microplastic, and its wiping ring is composed of plant-based materials instead of plastic.

The influencer landscape will gain more autonomy

As reports on the negative impact of social media on mental health emerged, consumers started to seek more authentic connections and a sense of belonging, rapidly accelerating Mintel's 2030 BPC Trend [Identity Traders](#).

Influencers' new autonomy and [ultra-engaged communities](#) will give access to broader insights on communities and maximise return on investment in customer acquisition costs.

Base: Brazil:1,000 internet users aged 16+

Source: Lightspeed/Mintel; [Mintel's Global Consumer 35 Markets](#)

UNETHICAL PRACTICES

30%

of Brazilian female consumers aged 16-24 stopped following online influencers that don't represent their values (eg unethical practices).

Self-expression wins over perfection

It is important for brands to take notice of consumers' conversations around the meaning of 'beautiful' and be mindful about general beauty diktats aiming to 'erase' imperfections. Consumers want a flawless look that builds confidence without stigmatizing imperfections. As such, brands would benefit from **adopting skin-positive messaging** to allow users to create their makeup looks without feeling pressured to reach 'perfection', a concept that no longer resonates.



The [Advertising Standards Authority](#) has ruled that social media filters shouldn't be used if they exaggerate the effect of a beauty product



Sara Carstens' makeup look embracing [dark circles](#) went viral

Continued focus on diversity, gender-inclusive and empowerment themes

NPD continued to align with the even bigger focus on social action around diversity, inclusivity and empowerment during COVID-19.



'Beauty is for everyone' brand from drag queen star

The media spotlight on drag queens inspires inclusive NPD. [KimChi Chic Beauty](#) (by *RuPaul's Drag Race* star) is founded on the belief that beauty is for everyone. [2 Queens In 1 Desert Collection](#) is created with fellow drag queen Naomi Small.



'For and by humans'

[Superfluid](#), an Italian ethical beauty brand 'for and by humans', encourages people to feel confident by embracing their own identities. It offers both colour and skincare products to help people 'explore identity'.



Carnival-themed highlighter in two shades for all

Diversity and inclusivity-minded Uoma Beauty has launched a celebratory Black Magic Carnival range. It includes multi-tasker [Bronzing Highlighter](#) for face/body, available in just two shades (Barbados and Notting Hill) for all skintones.

Meet Mintel's Experts



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