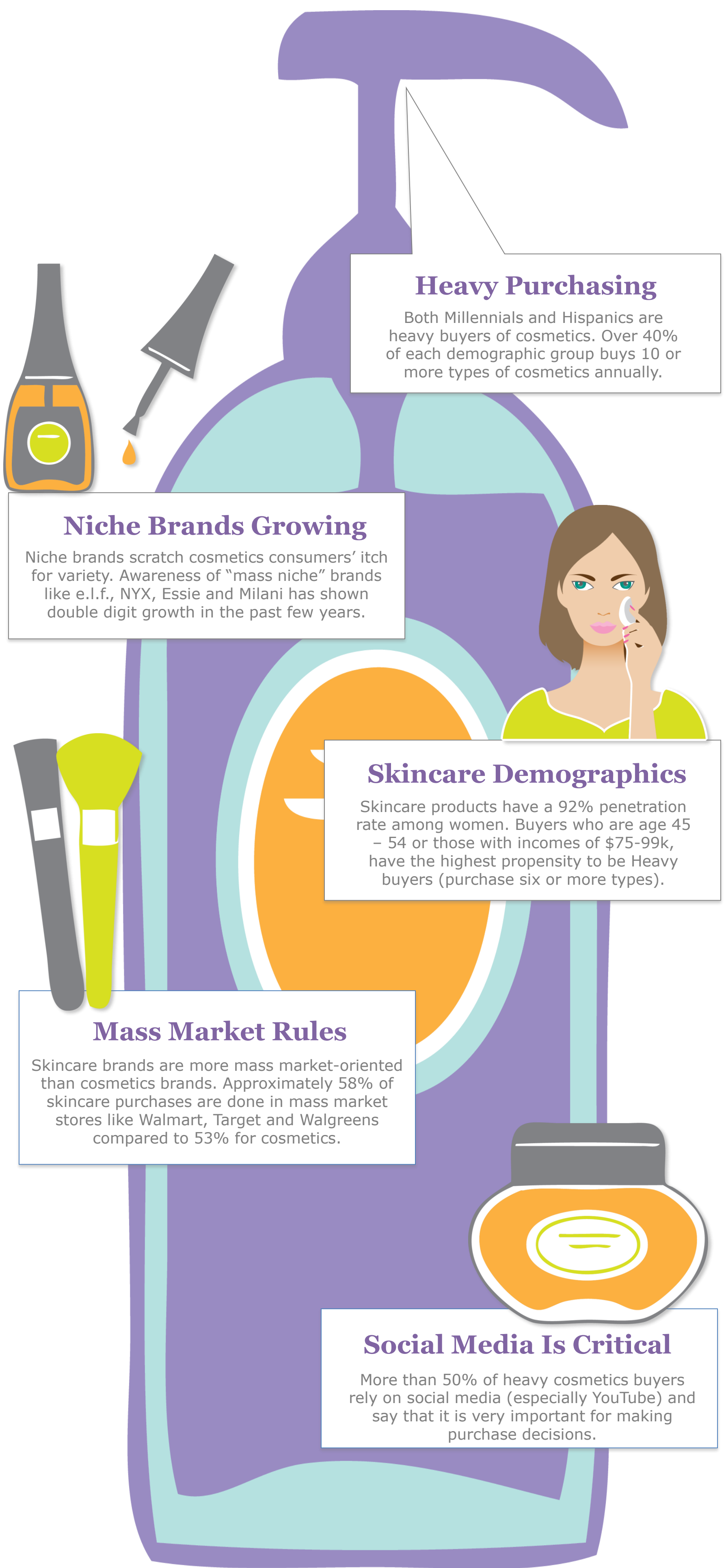


Higher Awareness of Beauty Brands is Helping Mass Market

Consumers are trying many new brands, and this is boosting cosmetics and skin care purchases in Mass Market retailers.



Heavy Purchasing

Both Millennials and Hispanics are heavy buyers of cosmetics. Over 40% of each demographic group buys 10 or more types of cosmetics annually.

Niche Brands Growing

Niche brands scratch cosmetics consumers' itch for variety. Awareness of "mass niche" brands like e.l.f., NYX, Essie and Milani has shown double digit growth in the past few years.

Skincare Demographics

Skincare products have a 92% penetration rate among women. Buyers who are age 45 - 54 or those with incomes of \$75-99k, have the highest propensity to be Heavy buyers (purchase six or more types).

Mass Market Rules

Skincare brands are more mass market-oriented than cosmetics brands. Approximately 58% of skincare purchases are done in mass market stores like Walmart, Target and Walgreens compared to 53% for cosmetics.

Social Media Is Critical

More than 50% of heavy cosmetics buyers rely on social media (especially YouTube) and say that it is very important for making purchase decisions.

TABS Analytics

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Source: TABS Analytics 2016 Beauty Study (includes both cosmetics and skincare.) 1,000 General Population Adults ages 18-75. "Cosmetics" defined as the following categories: Face: Foundation, Blush, Face Power, Concealer, BB_CC Cream, Bronzer, Highlighter; Eye: Mascara, Eye Liner, Eye Shadow, Eyebrow, Eye Lash; Nail: Nail Polish, Nail Treatment, Artificial Nails, Nail Kit; Lip: Lip Gloss, Lip Liner, Lipstick, and Gift Set. "Skincare" defined as the following categories: Face: Cleansers, Cleansing Wipes, Exfoliating Products, Moisturizers, Eye Serums, Acne Treatments, Other Face; Body: Body Moisturizers, Hand Moisturizers, Moisturizers with Self-Tanning, Products for Stretch Marks, Other Body.