

Black Beauty Consumer - US - March 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Black women are less likely to use cosmetics in comparison to the general market, but her usage varies across beauty products due to her skill set, her knowledge of expected benefits, and most importantly, her ability to find products in the right shades to create her desired look. Her beauty product choices are influenced by a variety of sources, but all must authentically reflect her image and specific needs.

This report looks at the following areas:

- Black women spent \$1.7B on beauty care products in 2017
- Black women fall into four distinct beauty consumer segments
- Lip makeup is her staple, but foundation and eye usage based on look and color match
- Beauty purchases are included in her household shopping trips

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Black Beauty Consumer - US - March 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The insights

Black women spent \$1.7B on beauty care products in 2017

Figure 1: Total US retail sales and Black consumer expenditures on beauty products, at current prices, 2012-17

Black women fall into four distinct beauty consumer segments

Figure 2: Black beauty segments, December 2017

Lip makeup is her staple, but foundation and eye usage based on look and color match

Figure 3: Beauty tasks, by Black vs. all, December 2017

Beauty purchases are included in her household shopping trips

Figure 4: Beauty product shopping locations, Black vs. all, December 2017

The opportunities

Guide her to the right products where she is already shopping for cosmetics

Figure 5: Beauty product shopping locations, by beauty tasks, December 2017

Beauty messaging that mirrors her image drives product trial

Figure 6: Beauty product trial influencers, December 2017

What it means

The Market – What You Need to Know

Black beauty expenditures expected to grow in tandem with the general market

Fenty Beauty brand launch has changed consumer expectations

Mass brands are affordable, premium brands are made for them in mind

The Black Female Population by the Numbers

There are an estimated 22.8 million Black females in the US

Figure 7: Total US and Black female population estimates, 2013-23

More than eight in 10 Black females are aged 12 years or older

Figure 8: Black female population estimates, by age group, 2018

Market Size and Forecast

Black women spent an estimated \$1.66 billion on beauty products in 2017

Figure 9: Total US retail sales and Black consumer expenditures on beauty products, at current prices, 2012-17

Figure 10: Expenditures by Black consumers on beauty products, at current prices, 2012-17

Market Breakdown

Mass market brands top Black women's beauty purchases, but she prefers to try products prior to purchase. She has been conditioned to searching for products that are made for her and will choose higher-priced products that work if her budget allows.

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Beauty Consumer - US - March 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Lip Products

Lip gloss texture and easy application make it Black women's preferred lip product

Figure 11: Lipsticks and lip gloss used by type, Black indexed to all, July 2016-August 2017

Specialty brands, most likely targeted brands, top Black women's lip purchases

Figure 12: Lipstick and lip gloss use of leading brands, Black indexed to all, July 2016-August 2017

Eye Makeup

Natural, nude look trends and brand preferences dictate eye makeup usage

Figure 13: Eye makeup usage, Black indexed to all, July 2016-August 2017

Premium eye makeup's efficacy linked to foundation anchor product

Figure 14: Eyeshadow, eyeliner, and eyebrow pencil use by leading brands, Black indexed to all, July 2016-August 2017

Maybelline and CoverGirl mascara lines offer variety, M.A.C. is the premium standard

Figure 15: Mascara use by leading brands, Black indexed to all, July 2016-August 2017

Face Makeup

Black women's foundation use highlights their preference for a natural look

Figure 16: Foundation used by type, Black indexed to all, July 2016-August 2017

Foundation brands sold by trusted experts top Black women's use

Figure 17: Foundation use by leading brands, Black indexed to all, July 2016-August 2017

Skincare Products

Skincare helps Black women put their best face forward

Figure 18: Facial cleansing, medicated products, toners types used, Black indexed to all, July 2016-August 2017

Specialty and traditional favorites top Black women's skincare brand list

Figure 19: Skincare use of leading brands, Black indexed to all, July 2016-August 2017

Market Perspective

If you build it, they will come – Fenty Beauty

Figure 20: Fenty beauty by Rihanna teaser video, September 2017

Market Factors

Most Black women have some college education

Figure 21: Female educational attainment across race/Hispanic origin, 2017

Black women have the highest labor force participation ... and unemployment rates

Figure 22: Female labor force participation, employment and unemployment rates across race and Hispanic origin, 2017

Half of Black women earn less than \$25K per year

Figure 23: Female personal income across race and Hispanic origin, 2017

Key Players – What You Need to Know

Independent brands create trendy products with Black women in mind

K-Beauty trends lack awareness among Black women

Tech-enabled product innovations set to elevate consumer expertise

What's Working?

Natural and nude pigments made for Black skin

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Beauty Consumer - US - March 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 24: MENTED COSMETICS – OUR STORY, OUR PROMISE, JANUARY 2017

Mainstream brands extend product innovation and marketing outreach to women of color

What's Struggling?

- K-beauty does not resonate among Black women
- Mainstream brand missteps in messaging toward Black women

What's Next?

- Black-owned makeup brands gain traction
- Product innovation for at-home use

The Consumer – What You Need to Know

- Lip makeup and nail products most used in the category at home
- Convenience drives most shopping occasions, but engaged consumers need expert engagement in store
- Enhancing natural looks drive beauty product usage
- Black women trust messaging and people that understand her beauty goals
- Natural beauty trends are of great interest

Black Beauty Segmentation

- Four identified beauty segments among Black women
 - Figure 25: Black beauty segments, December 2017
- Validated Beauty women stay trendy as her beauty needs change
 - Figure 26: Profile of Validated Beauty segment, December 2017
- Beauty Obsessed women are trendsetters whose expertise matches professionals
 - Figure 27: Profile of Beauty Obsessed segment, December 2017
- Confident Beauty women represent traditional beauty attitudes
 - Figure 28: Profile of Confident Beauty segment, December 2017
- Old-School Beauty women maintain a minimalist beauty regimen
 - Figure 29: Profile of Old-School Beauty segment, December 2017

Beauty Tasks and Frequency

- Color products drive Black women's cosmetics use
 - Figure 30: Beauty tasks, by Black vs. all, December 2017
- Lip products are the go-to makeup for more than half of Black women
 - Figure 31: Beauty tasks by frequency, any makeup, December 2017
- Skin treatments and device use is integrated in Black women's beauty routine
 - Figure 32: Beauty tasks by frequency, any skin treatment, December 2017
- Natural nail wearers apply polish at home, those with nail enhancements regularly go to the salon
 - Figure 33: Beauty tasks by frequency, any nails, December 2017
- Black women rely on their personal skills to shape brows and apply eyelashes at home
 - Figure 34: Share of eyelash and eyebrow product introductions, 2012-17
 - Figure 35: Beauty tasks by frequency, any eye enhancements, December 2017

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Black Beauty Consumer - US - March 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Beauty Product Shopping Locations

Black women purchase beauty products during their personal and haircare shopping trips

Figure 36: Beauty product shopping locations, Black vs. all, December 2017

Face and eye makeup purchased at locations that stock products formulated for Black women

Figure 37: Beauty product shopping locations, by beauty tasks, December 2017

Black women in upper-income households buy beauty products across all retailers

Figure 38: Select beauty product shopping locations, by household income, December 2017

Beauty Obsessed and Confident Beauty women shop at a variety of retailers

Figure 39: Beauty segments, by shopping locations, December 2017

Reasons for Using Beauty Products

The natural beauty trend is dominant among Black women

Figure 40: Reasons for using beauty products, December 2017

Figure 41: Reasons for using beauty products, by beauty segments, December 2017

Young women have fun with makeup, older women wear makeup to perfect their natural selves

Figure 42: Reasons for using beauty products, by generational group, December 2017

Beauty Product Trial Influencers

Black women trust messaging and advocates that mirror themselves

Figure 43: Beauty product trial influencers, December 2017

Young Black women are influenced by people they are emotionally connected to

Figure 44: Beauty product trial influencers, by generational groups, December 2017

Validated Beauty women most influenced by traditional messaging

Figure 45: Beauty product trial influencers, by beauty segments, December 2017

Beauty Trends of Interest

Natural beauty looks require natural beauty products

Figure 46: Beauty trends of interest, December 2017

Black women who prefer natural beauty products least likely to wear full makeup

Figure 47: Beauty trends of interest, by beauty tasks, December 2017

Women with more disposable income more likely to experiment with beauty trends

Figure 48: Select beauty trends of interest, by income, December 2017

Beauty Obsessed and Confident Beauty women follow tech-focused trends

Figure 49: Beauty trends of interest, by beauty segments, December 2017

Beauty Attitudes and Behaviors

Natural beauty products have greater value vs expensive or high-end products

Figure 50: Beauty Attitudes and Behaviors – any agree, Black vs. all, December 2017

... but there is some ambivalence on the effectiveness of mainstream products

Figure 51: Beauty Attitudes and Behaviors, December 2017

Natural ingredients are preferred, but unacquainted segments need more proof of efficacy

Figure 52: Attitudes toward natural products and brands, by beauty segments, December 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Beauty Consumer - US - March 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Expensive beauty products do not translate to value, especially to natural product users

Figure 53: Attitudes toward expensive and high-end beauty products, by beauty segments, December 2017

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 54: Expenditures by Black consumers on beauty products, at current prices, 2012-22

Figure 55: Total US retail sales and Black consumer expenditures on beauty products, at current prices, 2012-17

Appendix – The Consumer

Figure 56: Lipsticks and lip gloss used by type, Black indexed to all, July 2016-August 2017

Figure 57: Lipstick and lip gloss use of leading brands, Black indexed to all, July 2016-August 2017

Figure 58: Eye makeup usage, Black indexed to all, July 2016-August 2017

Figure 59: Eyeshadow, eyeliner, eyebrow pencil use by leading brands, Black indexed to all, July 2016-August 2017

Figure 60: Mascara use by leading brands, Black indexed to all, July 2016-August 2017

Figure 61: Foundation used by type, Black indexed to all, July 2016-August 2017

Figure 62: Foundation use by leading brands, Black indexed to all, July 2016-August 2017

Figure 63: Facial cleansing, medicated products, toners types used, Black indexed to all, July 2016-August 2017

Figure 64: Skincare use of leading brands, Black indexed to all, July 2016-August 2017

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com