

PERFECT

2020 Q2

# Global Beauty Trends Report

The surge in **eye makeup** try-ons during the COVID-19 pandemic.



by YouCam Makeup

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# 1 Overview

With the rapid spread of COVID-19 and governments around the world imposing strict quarantine and social distancing guidelines, beauty consumers are riding out this challenging time through their devices. As beauty lovers remain confined to their homes and global health and hygiene concerns continue to grow, virtual makeup try-ons are also on the rise. Since traditional in-store beauty experiences requiring a physical presence like beauty tutorials, expert consultations, and makeovers have been put on hold, beauty aficionados have turned to virtual beauty experiences (like those offered by YouCam Makeup) instead, revealing a lot about their changing beauty behaviors. Furthermore, new protective measures requiring face masks covering the nose and mouth are resulting in heightened interest around eye makeup—both for consumers and brands alike.

The beauty industry has proven overtime to withstand economic disruption better than most industries, due to the appeal of affordable, feel-good, look-good luxuries, even during an unsettling time—a concept commonly referred to as the “lipstick index”. However, as our mouths are being hidden behind masks, the trend towards an eye makeup focused measure (like the “mascara index”<sup>1</sup>) may quickly become the more accurate indicator post-pandemic. To help identify these consumer shifts across different makeup categories, the Perfect Corp. Global Beauty Trends Report measures the virtual try-on behaviors across top markets.

\* <sup>1</sup>Source:  
<https://www.townandcountrymag.com/style/beauty-products/a32406560/end-of-lipstick-index-coronavirus-recession-mascara-index/>

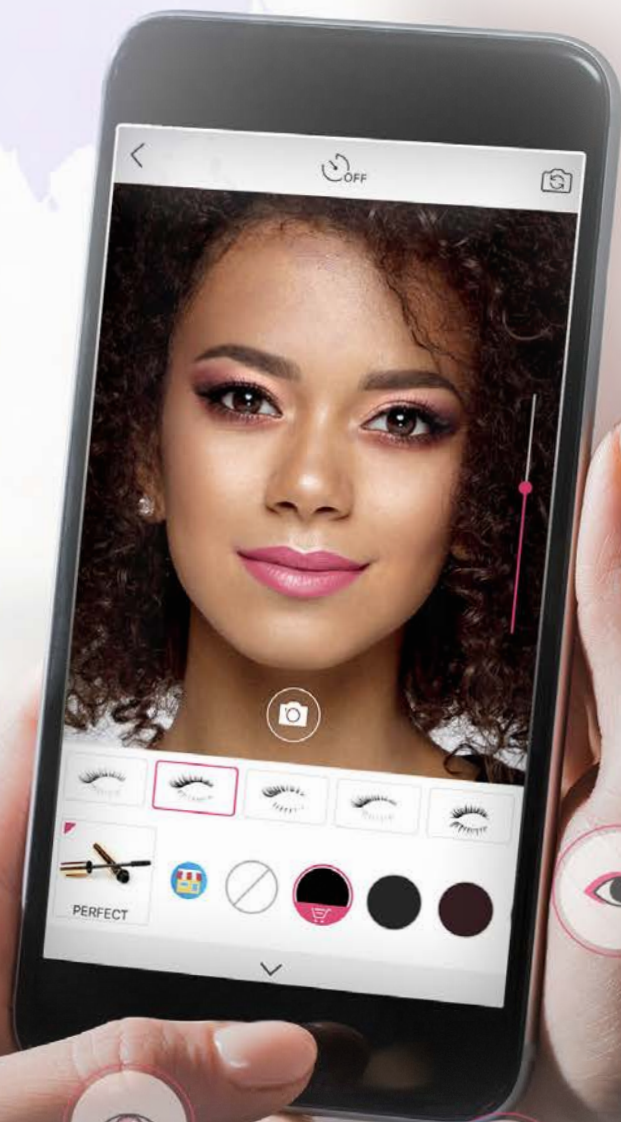


## 1.1 / The Rise of Virtual Try-Ons

This Global Beauty Trends Report will focus on five different countries that have observed the highest increase in virtual makeup try-ons within the YouCam app: **Germany, Spain, United Kingdom, Italy, and the United States**. According to the YouCam Makeup's usage statistics during the pandemic, makeup tryouts have significantly increased on a global scale, with the total increase in tryouts adding **up to 28% between 2/24 and 4/6**. The increasing popularity of video conferencing and video chats means many consumers are still wearing makeup, but they have adapted to the new reality. Many have turned to virtual makeup try-ons to practice their "professional stay-home looks" and "Zoom call looks".

# 28%

increase in total virtual try-ons after COVID-19 outbreak



## 1.2 / Eye Makeup For the Win

Due to the fact that beauty salons and cosmetic counters are temporarily shut down, people are turning to virtual makeup try-ons more than ever as a way to discover, experiment, play, and shop for beauty. The ease of virtual try-on lends itself to convenient, fast, and mess-free beauty experimentation, inviting beauty fans to test that elaborate eye makeup style that goes well with a face mask and typically takes a long time to create and master. This is especially prominent in European countries, where the most popular beauty try-ons involved more intricate techniques like eyebrow shape, highlighter, and false eyelashes. **Eye makeup** (including eye shadow, eyebrows, mascara, false eyelashes and colored contacts) generated the most try-ons in the 5 analyzed countries, increasing by nearly **29.5%**.

As markets will gradually start to reopen and lives will slowly return to normal, eye makeup will surely retain its prominent position as everyone will continue to cover their faces with masks in the new post-pandemic era. Lipstick and lip gloss products will be replaced by cosmetics that enhance the eyebrows and eyes, such as mascara, eye shadow, eye liner, and false eyelashes.

#1 Tryout Category

**Eye  
Makeup**

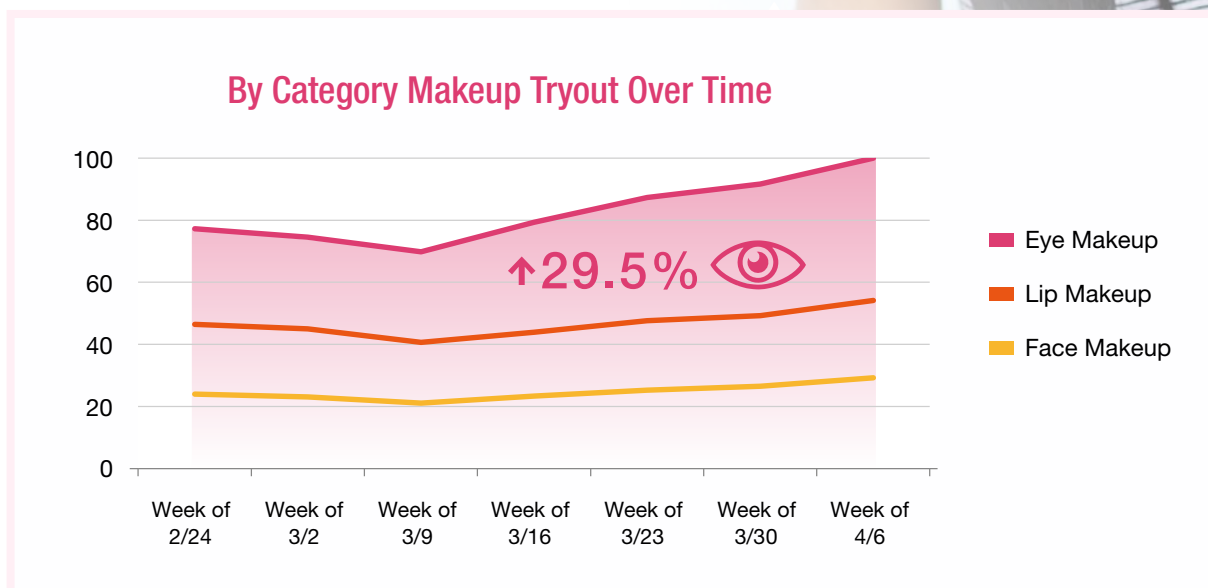
**↑29.5%**



## 1.3 Makeup Tryouts Looking Up

All 5 countries experienced a significant drop in virtual try-ons during the week of 3/9, likely attributed to the rising fear, concern, and chaos stirring up, just days before the official global pandemic was declared on 3/11. It was during this time that many businesses were voluntarily shutting down, adopting remote work practices and making extreme changes to daily lives. Beginning the third week of March, the virtual beauty try-on rate has been steadily increasing, with the week of 4/6 reaching the highest tryout numbers yet, when compared to the week of 2/24/20 and 3/2/20, pre-pandemic.

As we can see, tryouts are focused mostly on the eyes. While lipstick remained one of the popular categories overall, the number of lipstick tryouts hasn't increased significantly perhaps due to the fact that more people are wearing face masks/face covers and emphasizing other forms of makeup.



\* Numbers represent tryout numbers relative to the highest point on the chart for the given region and time. A value of 100 is the peak tryout for the category. A value of 50 means that the tryout is fifty percent of the peak number.

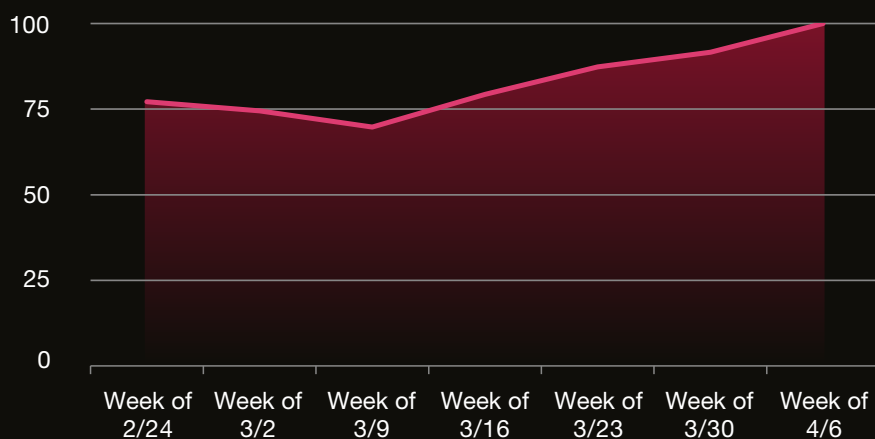
# EYE MAKEUP

## VIRTUAL TRYOUT

↑ 29.5%

This broader tryout category includes mascara, false eyelashes, eyebrows, eye shadow, and colored contact tryouts. This category has generated the most interest among global YouCam users, with total tryouts in this category increasing by 29.5%

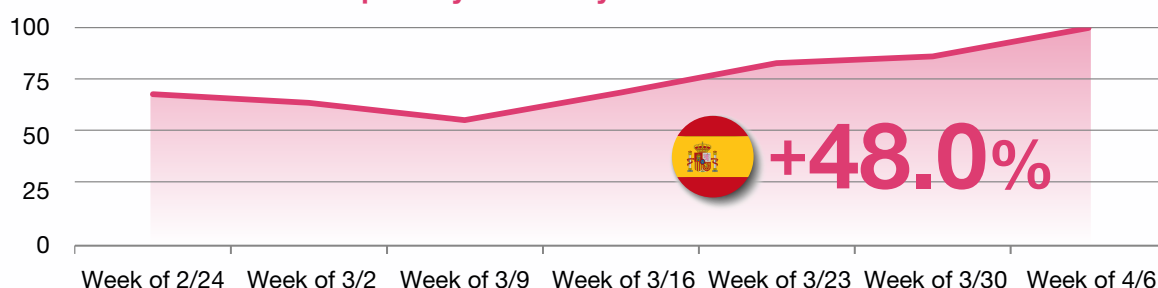
Eye Makeup Tryout Over Time



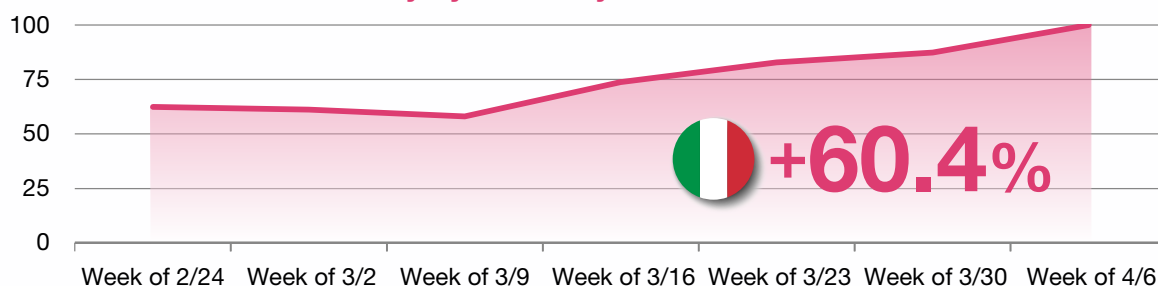
## 2.1 Eyebrow Leads the Way

Finding the right eyebrow shape can make a big difference. Eyebrows are one of the most important features because they frame every aspect of your face. In **Spain** eyebrow tryouts were especially popular, growing by nearly 48%. YouCam users in **Italy** also showed an increased interest towards eyebrow tryouts, with 60.4% increase between 2/24 and 4/6. In the **US** false eyelashes tryouts were also quite popular, increasing by 30.1%.

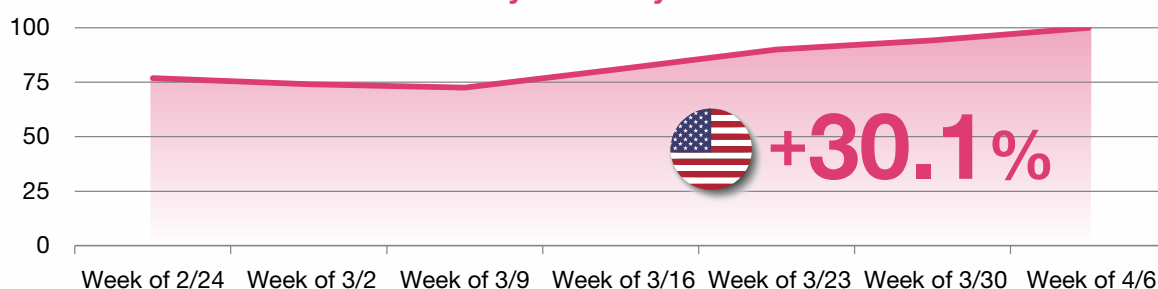
Spain Eyebrow Tryout Over Time



Italy Eyebrow Tryout Over Time



United States Eyebrow Tryout Over Time



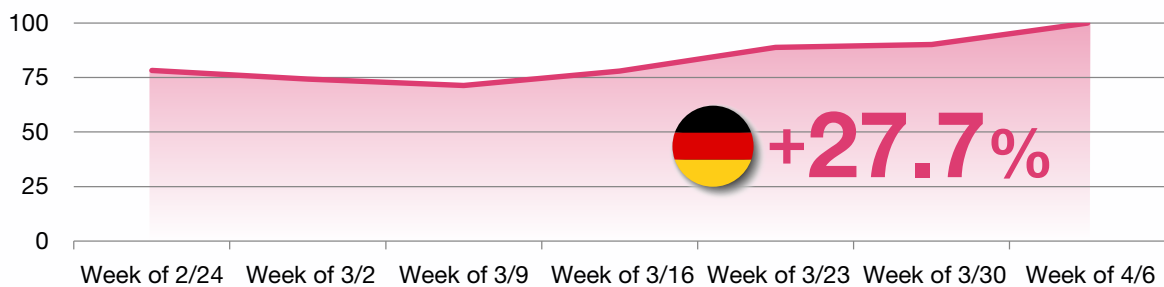


## 2.2 / False Lashes, a True Beauty Statement

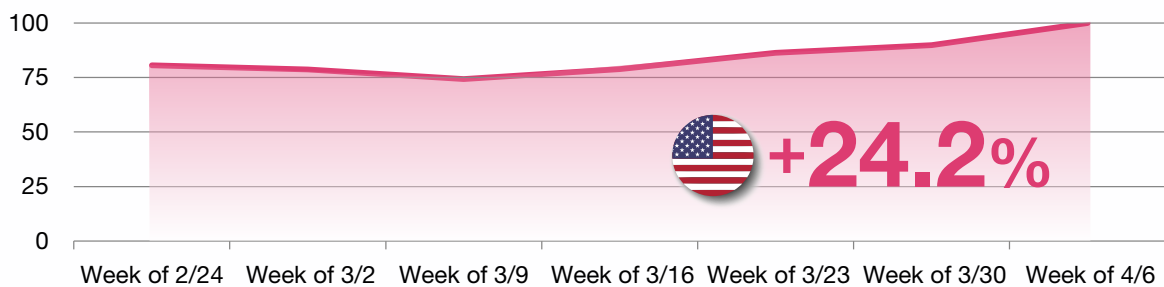
False eyelashes are used to further enhance eye makeup. They not only emphasize your eyes, but also give them a distinct look that will draw all the attention. In **Germany** and the **US**, false eyelashes try-outs have increased noticeably after the announcement of pandemic, with 27.7% and 24.2% increase respectively.



Germany False Eyelashes Tryout Over Time



United States False Eyelashes Tryout Over Time

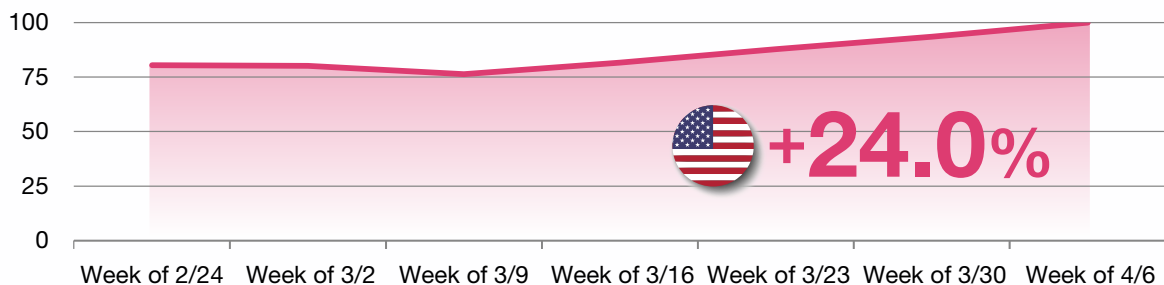


## 2.3 Mascara to Upgrade Your Mask Look

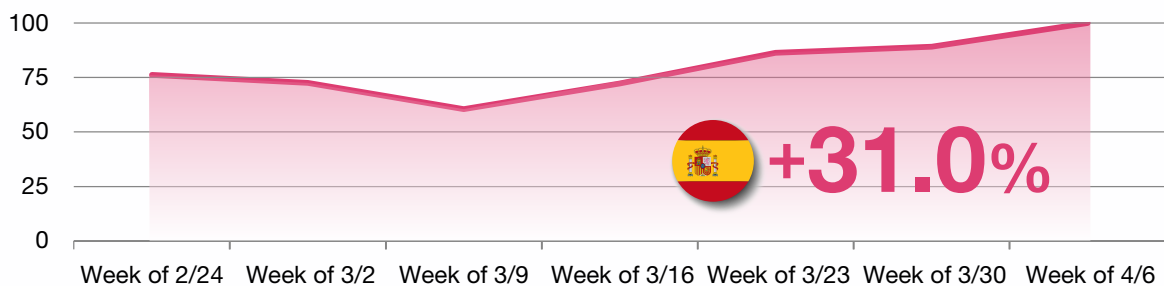
Being that mascara is often quoted as the #1 product beauty lovers won't leave home without, it's no surprise to see significant increases in global mascara try-ons. The most noteworthy including over 24% increase in the **US**, over 31% increase in **Spain**, and over 46% increase in **Italy**.



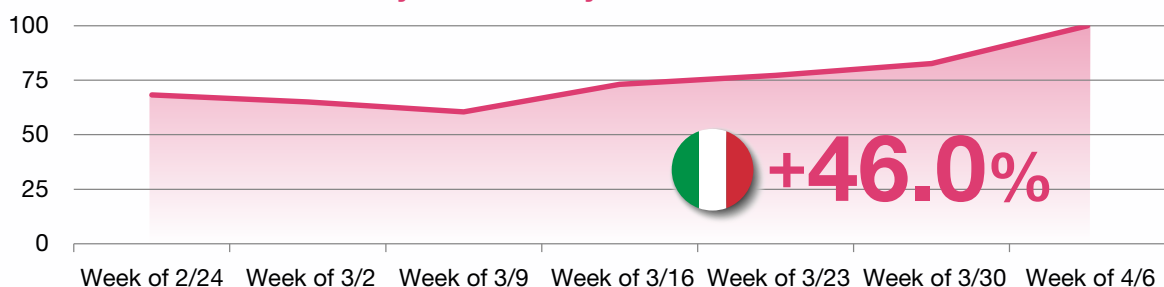
United States Mascara Tryout Over Time



Spain Mascara Tryout Over Time



Italy Mascara Tryout Over Time

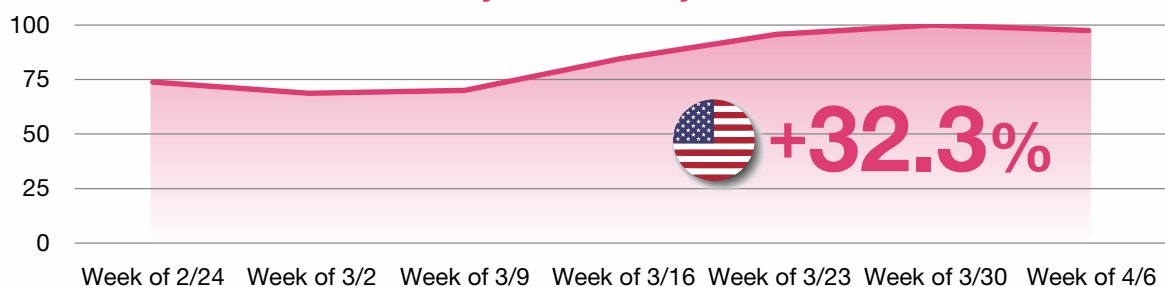


## 2.4 Eyeshadow Coming Out of a Shadow

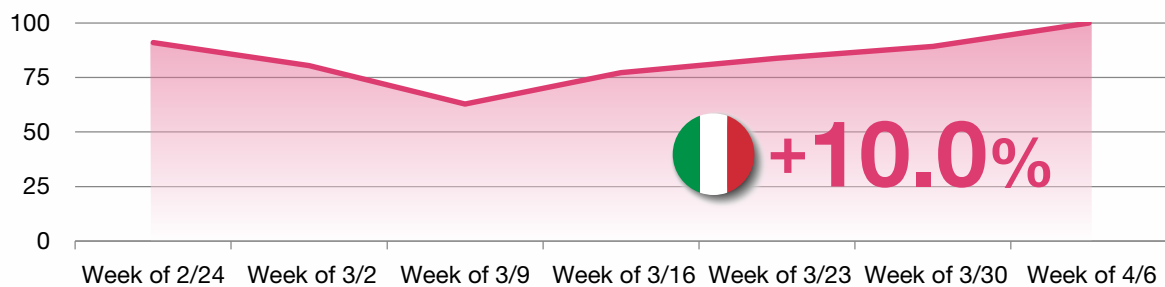
Given the extensive variety and combinations possible with eye shadow, it invites a heightened level of experimentation which proves especially convenient as virtual try-on within this category. This includes increases in eye shadow try-ons upward for 32.3% in **US** and nearly 10% in **Italy**.



United States Eye Shadow Tryout Over Time



Italy Eye Shadow Tryout Over Time

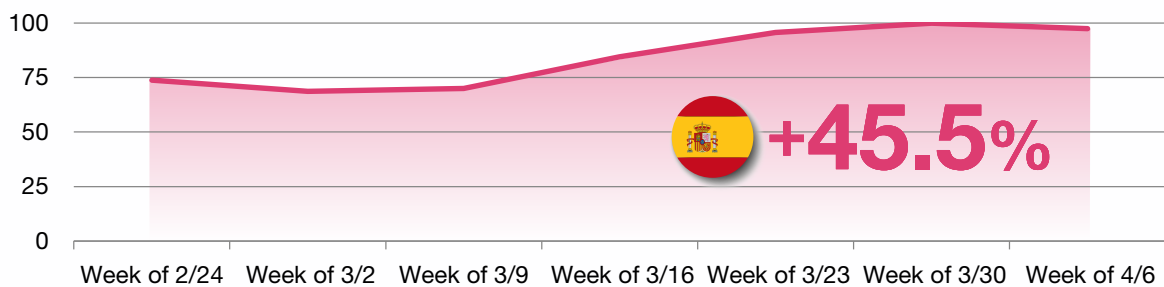




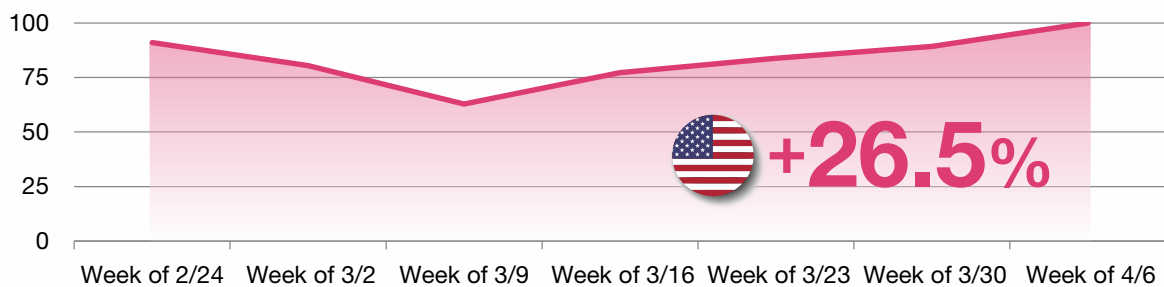
## 2.5 / Double Digit Growth for Colored Contacts

The eyes certainly are windows to the soul and they come in many different tints and colors. Virtual try-on provides an exciting opportunity to experiment with different eye colors. Colored contacts tryouts were on the rise in **Spain** and the **US**, increasing by 45.5% and 26.5% respectively.

Spain Colored Contacts Tryout Over Time



United States Colored Contacts Tryout Over Time



## 3 Conclusion

The proof is in the pudding. Significant increases in eye makeup virtual try-ons across all geographic locations are confirmation that virtual eye makeup try-ons are on the rise and here to stay. As face masks become an essential part of social life, eye makeup has surged in popularity. Even post-pandemic, this focus on eye makeup is likely to persist on a global scale, resulting in continued increases and focus surrounding eye makeup categories. Experimenting with eye makeup styles will be one way for beauty lovers to stand out while wearing personal protective equipment, presenting an opportunity for beauty brands to promote such products as eyeshadow, eyeliner, mascara, and false eyelashes. The convenience and ease of virtual try-ons bodes especially well within eye makeup categories, which invite various combinations and increased experimentation that encourages users to discover and try more products than ever before. This makes for a more desirable experience for the beauty shopper, and increased profits for the brands and retailers, especially across the eye makeup category. As we continue to be met by new challenges during these uncertain times, beauty lovers continue to adopt new beauty behaviors and preferences, and find new ways to engage with beauty products. Virtual beauty try-ons continue to provide a real utility to beauty brands and beauty shoppers alike, helping them adapt and connect to evolving consumer behavior as we assimilate back to life outside the home.

