

MARINE COLLAGEN +38%



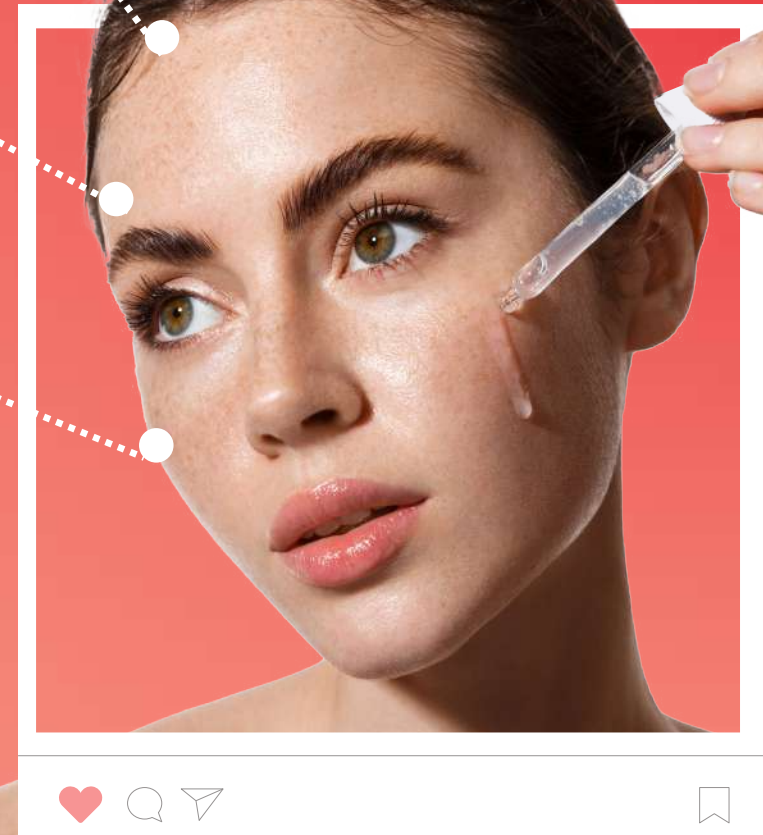
NIACINAMIDE +13%



UV PROTECTION +14%



THE FUTURE OF SKINCARE-INFUSED COSMETICS



CONSUMERS WANT
MORE THAN JUST
BEAUTY FROM THEIR
BEAUTY PRODUCTS.



They want extra-functionality.
Make-up will always be a means of self-expression and fun.

But beyond beauty, consumers want to proactively take better care of their skin.

In this report, we are going to explore the future of skincare-infused cosmetics.

Our focus will be on the **Lips** and **Face** spaces.

We will analyze the trends that brands should be moving on now, next and in the future.



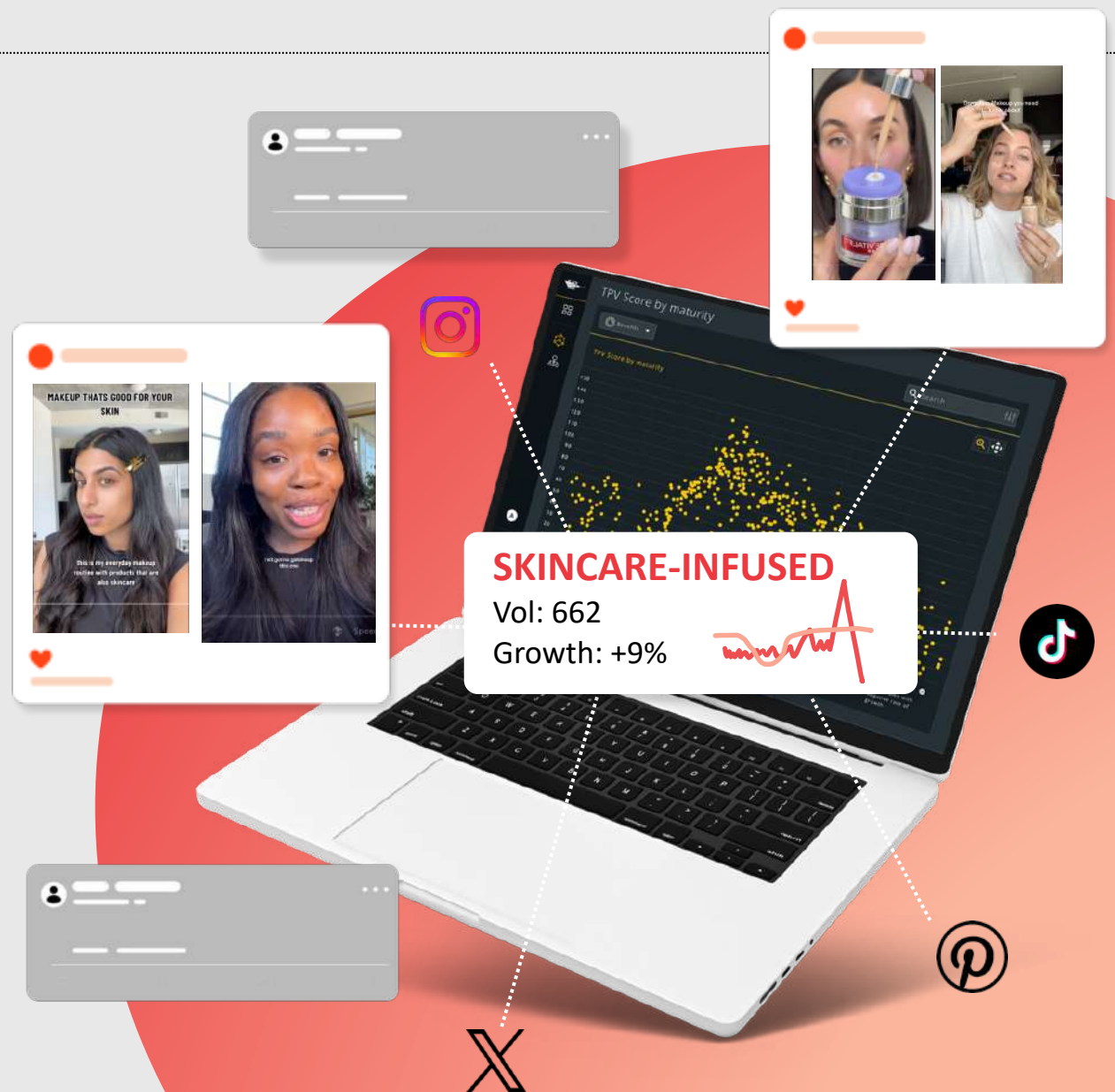
We are Black Swan Data

The insights inside this report do not come from surveys, panels or focus groups. There are no questions asked. Nor any prompted responses.

Our technology applies AI and predictive analytics to millions of social and online data points to understand behavioral trends.

It identifies, connects and predicts emerging trends and future consumer needs with **89%** accuracy.

Leading CPG brands are leveraging this data to make faster, more confident, evidence-driven decisions along each stage of the innovation process.



A different approach

This report was created using our
consumer intelligence platform

How does it work?

Our platform retrieves all the relevant consumer conversations in a category; in this example, **8+ million USA Cosmetics** conversations.

We use AI and data science to isolate all the individual trending topics and understand how they ladder-up into category growth drivers.

This dynamic segmentation framework is refreshed monthly and evolves as consumers and the category evolves.

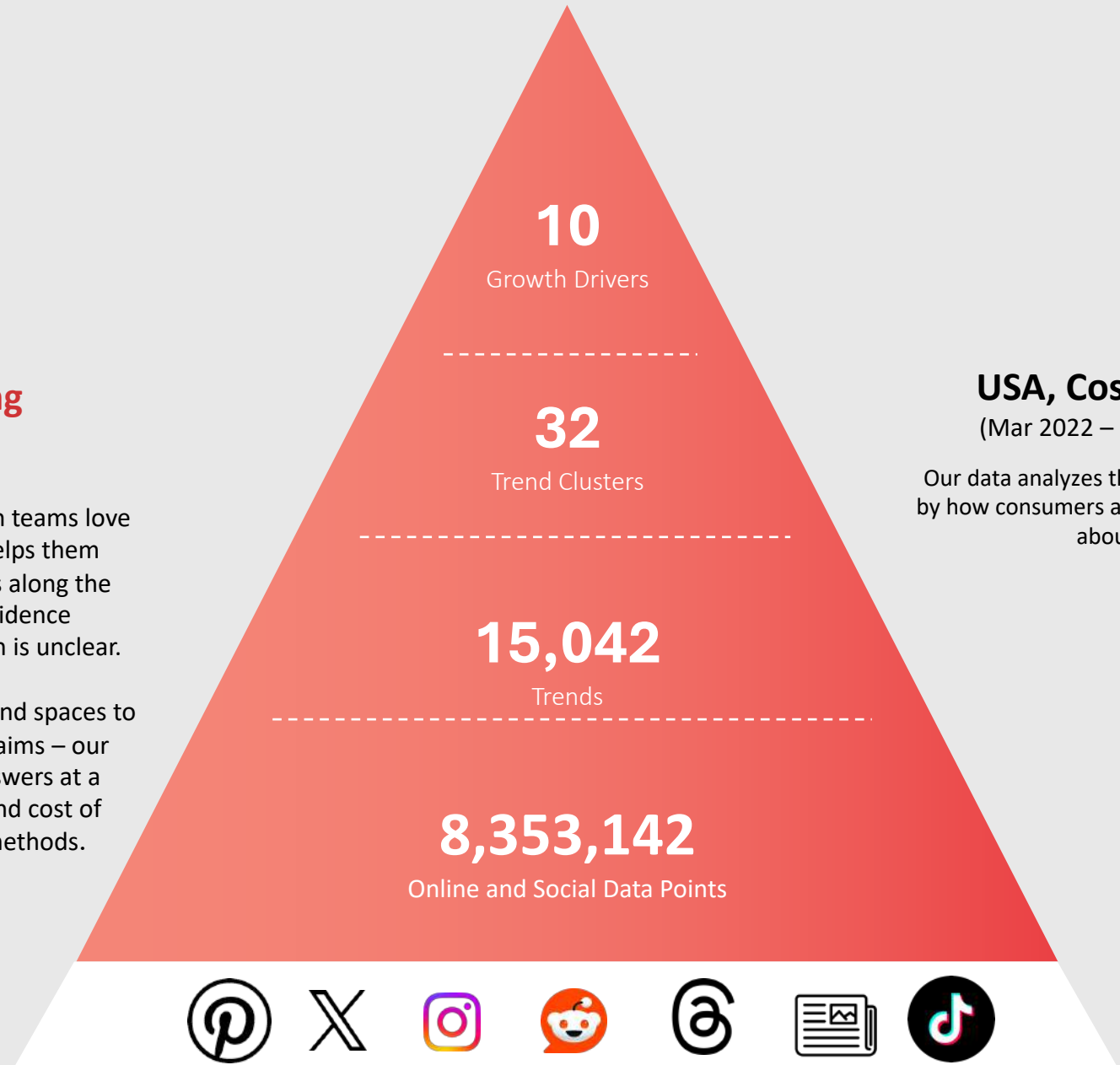
Game-changing capabilities

Insight and Innovation teams love using this data as it helps them make better decisions along the NPD process when evidence is lacking and the path is unclear.

From activating demand spaces to optimizing on-pack claims – our solutions give you answers at a fraction of the time and cost of traditional research methods.

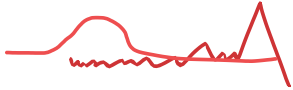
USA, Cosmetics (Mar 2022 – Mar 2024)

Our data analyzes the category by how consumers actively talk about it online.



FACE

IMPROVES SKIN TEXTURE **+45%**



TINTED SERUM **+3%**



MARINE COLLAGEN **+38%**



What's trending **NOW**

Make-up isn't **just about beauty anymore.**

Consumers want their cosmetics products to do more than just hide imperfections.

Our data forecasts a **72%** growth in consumer conversations around make-up that **Maintains Skin Health.**

Skincare-esque products like **Foundation Serum**, **BB Serum** and **SPF Setting Spray** are also on the rise.

Consumers are demanding options that offer long-term skin benefits like **Sun Protection** and **Boosts Hydration.**

They want to know that their makeup isn't just a cosmetic fix – but an investment in their skin's wellbeing.

Associated **Benefits**

Boosts Hydration

TPV #23
Vol: 167,229
Growth: +10%

Nourishing

TPV #152
Vol: 25,649
Growth: +20%

Sun Protection

TPV #224
Vol: 8,674
Growth: +18%

Oil Control

TPV #48
Vol: 5,610
Growth: +48%

Popular **Product** formats

Foundation Serum

TPV #580
Vol: 7,729
Growth: +17%



Hydrating Skin Tint

TPV #169
Vol: 370
Growth: +45%



BB Serum

TPV #1331
Vol: 45
Growth: +48%



SPF Setting Spray

TPV #96
Vol: 640
Growth: +32%



★★★★★

Love this tinted serum!

Hannah M.

INCENTIVIZED RECEIVED FREE PRODUCT

6 days ago

My skin feels super hydrated and smooth when I wear this. Love that it provides some light color and spf too.

Yes, I recommend this product.



@kaedelvr

i love my fenty skin tint sm for my dark circles it lasts all day and its SOOOO lightweight compared to foundation and concealer and ITS MOISTURIZING TOOOO best 50 bucks spent ever

9:03 PM · Jan 14, 2024 · 74 Views

Brand spotlight

Kosas has quickly become a TikTok favorite for their "skin-loving ingredients".

Their **BB Burst Tint Moisturizer Gel Cream** uses **Copper Peptides**, an ingredient that plumps and firms the skin by supporting collagen production.

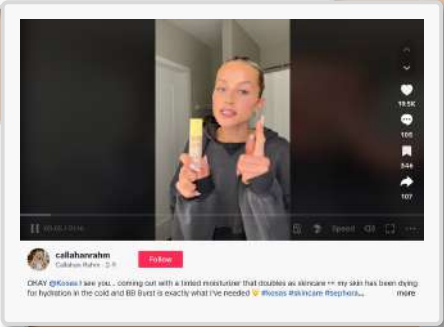
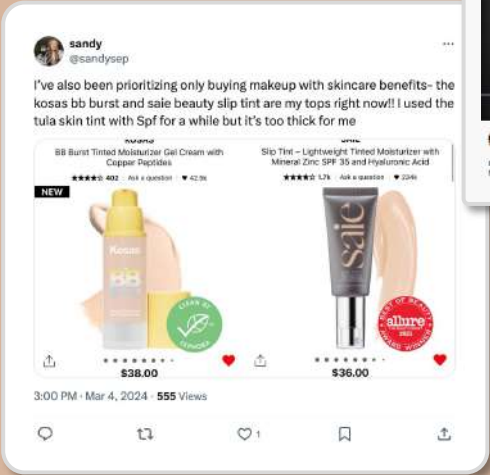
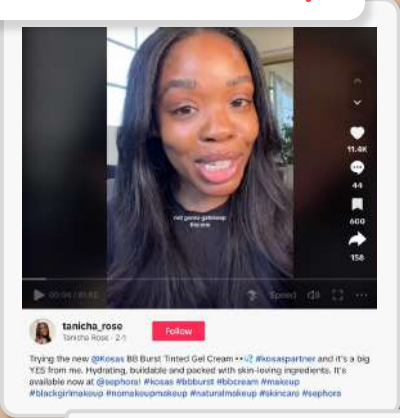
Consumers are buying this BB Tint again and again because it actively improves their skin.

Kosas

TPV #427

Vol: 23,170

Growth: +1%



BB Burst Tinted Moisturizer Gel Cream
with Copper Peptides



Hydrating Skin Tint
TPV #169
Vol: 370
Growth: +45%



BB Serum
TPV #1331
Vol: 45
Growth: +48%



Boosts Hydration
TPV #23
Vol: 167,229
Growth: +10%



Nourishing
TPV #152
Vol: 25,649
Growth: +20%



Smoothing
TPV #71
Vol: 20,854
Growth: +9%

Trends Kosas are targeting

Skincare benefits to activate NEXT

We've mapped the **trending skin benefits** for the face onto a Maturity Curve.

The mature benefits are stable, well-established trends that are relevant **NOW**.

Emerging and growing benefits are more up-and-coming and should be moved on **NEXT**.

We can see skincare needs becoming more specific and targeted. Consumers are searching for **Elasticity-Boosting** products and options that **Reduce Hyperpigmentation**.

But consumers are also seeking multifunctional solutions.

They want all these benefits in a hybrid product – and not as separate steps in their beauty routine.

 CURRENT ASSOCIATIONS

 ASSOCIATIONS TO EXPAND INTO

Reduces Hyperpigmentation

TPV #123

Vol: 231

Growth: 34%

Elasticity-Boosting

TPV #210

Vol: 269

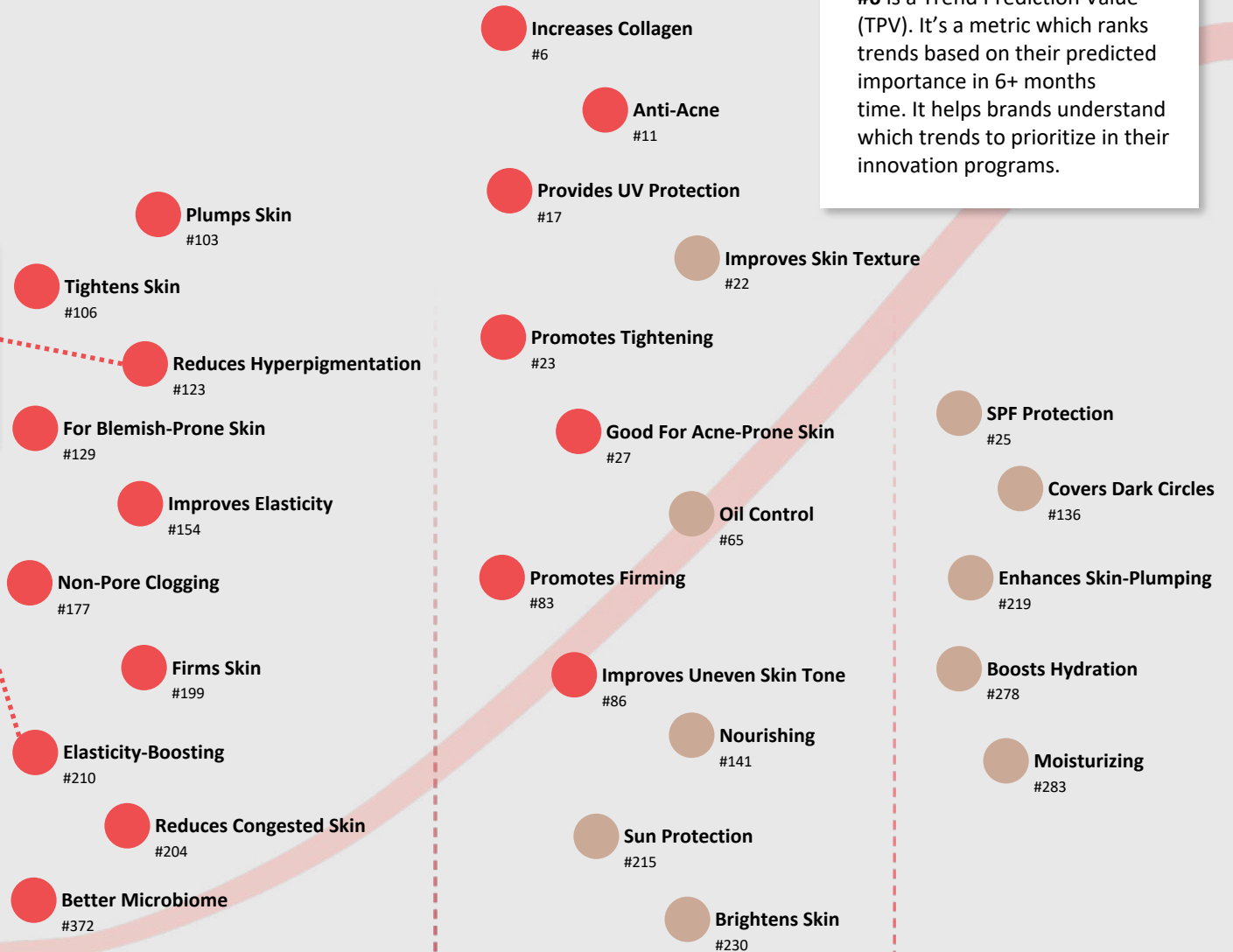
Growth: 23%

EMERGING

GROWING

MATURE

#6 is a Trend Prediction Value (TPV). It's a metric which ranks trends based on their predicted importance in 6+ months time. It helps brands understand which trends to prioritize in their innovation programs.



Trend spotlight

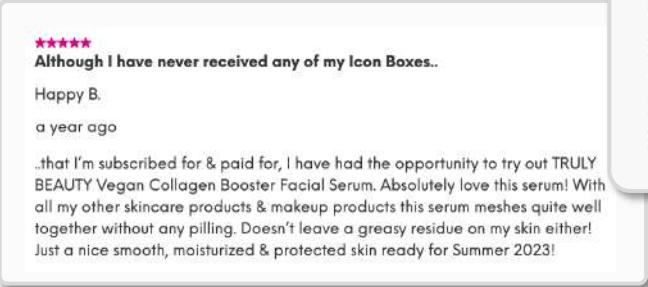
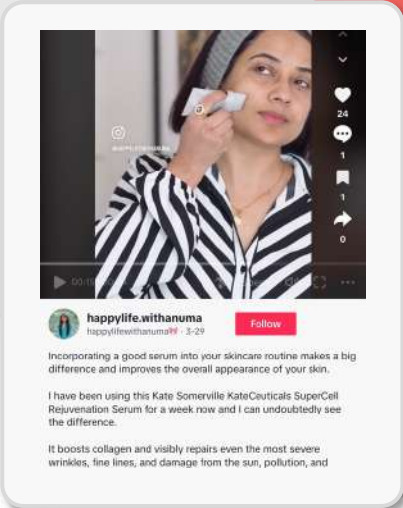
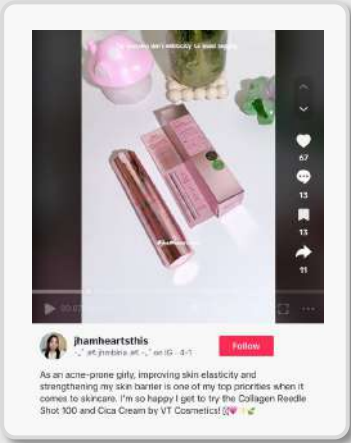
Increases Collagen is one of top-growing trends in the skincare-infused space.

Collagen is clinically-proven to prevent a variety of skincare issues. Such as wrinkles, fine lines, sun damage and acne.

Consumers turn to collagen-rich products for **Healthy Ageing** and **Youthful Looks**.

Comments on TikTok and Instagram tell us that some users think they don't blend well with foundation. And leave residue on the face.

They are demanding more convenient, hybrid beauty products that are infused with collagen to include in their make-up routines.



Increases Collagen
TPV #6
Vol: 955
Growth: +48%

A line graph with two lines, one red and one orange, showing an upward trend. The red line is above the orange line, and both show a significant increase towards the end of the period.

Clinically-Proven
Vol: 1,149
Growth: +19%



Youthful Look
Vol: 2,243
Growth: +31%



Acne-Prone Skin
Vol: 14,900
Growth: +3%



Healthy Aging
Vol: 187
Growth: +36%

PRODUCT FORMATS

**Tinted Serum**

TPV #382
Vol: 4566
Growth: +35%

**Concealer Serum**

TPV #347
Vol: 3711
Growth: +41%

**Hydrating Setting Spray**

TPV #60
Vol: 702
Growth: +24%

**BB Serum**

TPV #1341
Vol: 43
Growth: +40%

BENEFITS

**Increases Collagen**

TPV #6
Vol: 949
Growth: +47%

**Plumps Skin**

TPV #103
Vol: 397
Growth: +20%

**Improves Elasticity**

TPV #154
Vol: 287
Growth: +47%

**Improves Skin Texture**

TPV #22
Vol: 773
Growth: +45%

Innovation springboard

This is a springboard of **product formats**, **ingredients** and **benefits** associated with the key consumer needs in this space.

These trends can be the building blocks of an ultra-relevant new product idea.

We've prioritized a variety of serum formats and collagen-boosting, anti-aging benefits.

Ingredients like **Argireline** and **Buckthorn Oil** have been added for their collagen content.

As well as thematic trends to include in the messaging of a concept.

INGREDIENTS

**Argireline**

TPV #15
Vol: 162
Growth: +15%

**Marine Collagen**

TPV #38
Vol: 169
Growth: +38%

**Sea Buckthorn Oil**

TPV #46
Vol: 129
Growth: +16%

**Collagen Peptides**

TPV #128
Vol: 517
Growth: +25%

**Sun Damage**

TPV #49
Vol: 4590
Growth: +14%

**Cosmeceuticals**

TPV #198
Vol: 421
Growth: +49%

**Safe Beauty**

TPV #178
Vol: 729
Growth: +21%

**Blends Seamlessly**

TPV #28
Vol: 4250
Growth: +39%

New product concept

Introducing Tint & Transform Multi-Benefit Serum.

This skin tint combines the power of **Argireline**, a safer alternative to Botox, infused with **Marine Collagen**.

This hybrid make-up product improves skin texture, plumpness and skin elasticity.

Consumers can enjoy natural skin coverage with additional skincare benefits in an all-in-one, easy-to-use serum.

Trends to leverage for **Tint & Transform Multi-Benefit Serum**



Skincare Benefits

Plumps Skin

TPV #103
Vol: 397
Growth: +20%

Improves Skin Texture

TPV #22
Vol: 773
Growth: +45%

Claims

Blends Seamlessly

TPV #28
Vol: 4,250
Growth: +39%

Cosmeceuticals

TPV #198
Vol: 421
Growth: +49%

Product Format

Tinted Serum

TPV #48
Vol: 4,033
Growth: +3%

Ingredients

Argireline

TPV #15
Vol: 162
Growth: +15%

Marine Collagen

TPV #28
Vol: 169
Growth: +38%

LIPS

POLYGLUTAMIC ACID +54%



LIP JELLIES

+21%



ENHANCES COLOR

+26%



What's trending NOW

Consumers want products that **nourish** the lips to improve their dry, chapped appearance.

Beyond soothing benefits, they're looking for products that provide the essential nutrients to keep their lips soft and healthy.

The desire for plump lips also remains popular. Especially for those toying with the idea of getting fillers.

Consumers want the look of lip plumpers, without the high price or invasive treatment.

Product formats like **Lip Oils**, **Liners** and **Tints** are growing too.

The emergence of **peptide lips tints** is also indicative of the rise of skincare-infused products.

Associated Benefits

Soothes Dry Lips

TPV #188
Vol: 6,323
Growth: +4%

Nourishes Lips

TPV #325
Vol: 67
Growth: +35%

Softens Lips

TPV #355
Vol: 51
Growth: +34%

Plumps Lips

TPV #32
Vol: 3,135
Growth: +20%

Popular **Product** formats

Lip Plumping Serum

TPV #992
Vol: 146
Growth: +7%



Plumping Lip Oil

TPV #914
Vol: 116
Growth: +51%



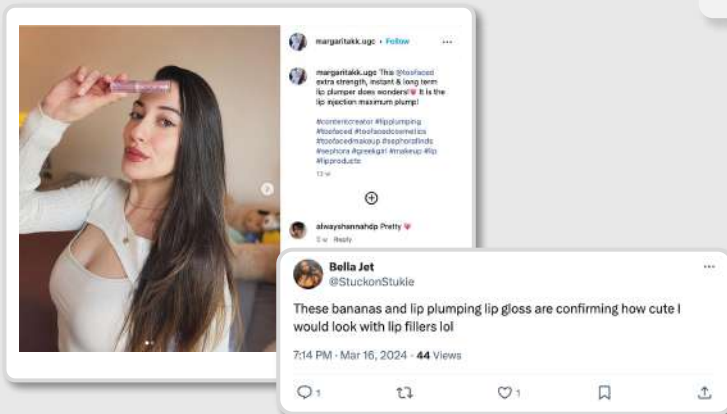
Plumping Lip Liner

TPV #818
Vol: 166
Growth: +55%



Peptide Lip Tint

TPV #1,231
Vol: 156
Growth: +44%



Brand spotlight

Lawless is a brand highly-associated with the skincare-infused cosmetics space.

Their **Forget The Filler** range includes a **Lip Plumping, Line Smooth Gloss**.

On TikTok and Instagram, consumers rave about its ability to fill lip lines and wrinkles.

It creates a smoother canvas for gloss and lipstick.

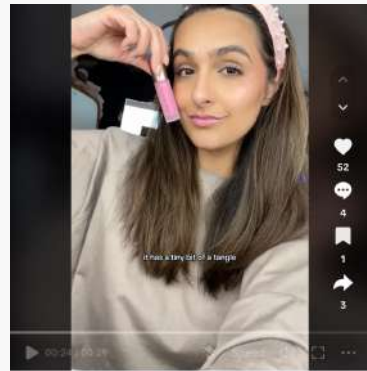
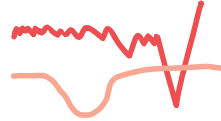
The plumping benefits deliver the coveted, juicy lips effect without invasive procedures.

Lawless

TPV #96

Vol: 1,854

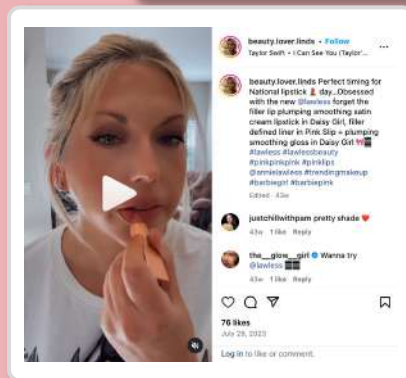
Growth: +12%



nextwithnita
nextwithnita · 4-22

Follow

Trying out the new @LAWLESS Beauty forget the filler lip plumping line smoothing gloss!! This is in shade daisy pink!! I love to applicator and it actually fills in the lines in your lips. So smooth!! #lawlesslipgloss #lawlesslipplumper #lipgloss



thelonaakira
thelonaakira · 2-7

I absolutely adore @LAWLESS Beauty Forget The Filler Lip Smoothing Gloss!! The applicator is so plush and the formula feels luxurious without being sticky. It gives your lips a gorgeous vinyl-like finish, smoothing them beautifully. And the best part? No burning sensation!!



Lip Plumping Serum

TPV #992

Vol: 146

Growth: +7%



Smoothing

TPV #207

Vol: 21,154

Growth: +5%



Hydrating Lip Gloss

TPV #56

Vol: 684

Growth: +15%



Softens Lips

TPV #356

Vol: 51

Growth: +34%



Plumps Lips

TPV #30

Vol: 3,224

Growth: +15%

Trends **Lawless** are **targeting**

Forget The Filler
Lip Plumper Line Smoothing Gloss

Skincare benefits to activate NEXT



The lip care trends to activate in the future reflect a movement towards **holistic, longer-term** lip health.

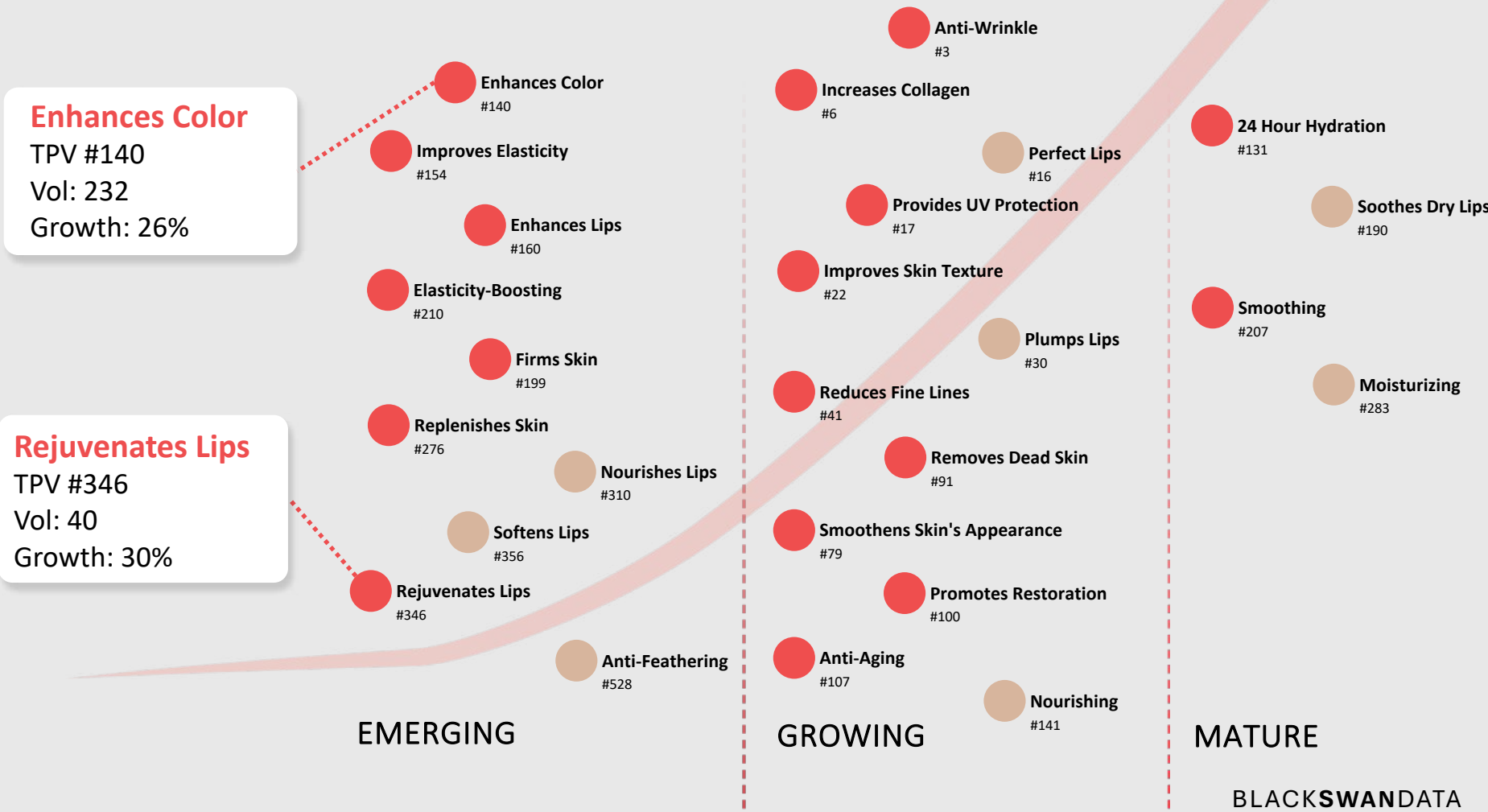
The emergence of the **Enhances Color** benefit reveals aesthetics are still important.

Consumers want to replicate the effects of lip blushing procedures, which inject pigment into the lips - making them appear fuller and more defined.

There is also an unmet need around rejuvenation. The **Rejuvenates Lips** claim combines different elements of lip care.

From soothing and anti-aging to plumping and restoring the condition of lips.

-  CURRENT ASSOCIATIONS
-  ASSOCIATIONS TO EXPAND INTO



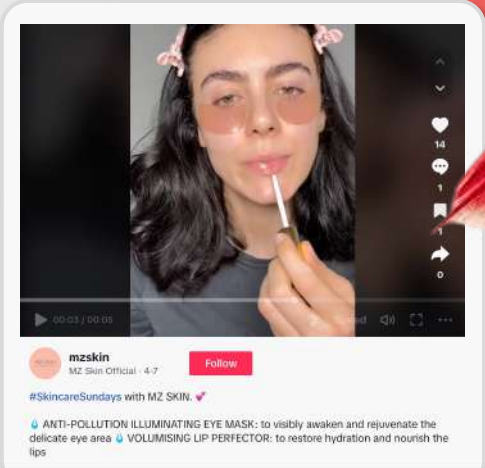
Trend spotlight

Promoting Restoration is a ‘watch this space’ trend in the lips sub-category.

Consumers are posting on TikTok and Instagram about their lips being harmed from heavy sun exposure. Or becoming chapped from dehydration.

They are moving towards lip oils and lip masks to revitalize and restore their lips.

While these products add a tint and can double up as a pigmented gloss; it’s their functional, restorative benefits that consumers love.



★★★★☆ [sillysally](#) 2 years ago

Fantastic product

I came back from a holiday in the sun with burnt cracked lips and got the lip comfort oil in Fig which has helped my lips heal and look good again. I love the fig colour and it leaves just a hint of pigment on the lips. The only problem I have is the lip oil doesn't last long so i need to keep refreshing it but I suppose that it's hard to make this kind of product long lasting. It has certainly helped me get through a few days where lipstick would have irritated my lips, so I'll keep using it. Feels really nice on .

★★★★★

Verified Purchase

28 Mar 2024

✓ Recommended

000 Universal - clear

Just purchased this two days ago, my lips were SO chapped they burned so bad. This lip glow oil is so thick , minty and glossy, it restored my lips with just a few swatches. It also turns into a pinkish color once applied on your lips .

Promotes Restoration

TPV #100

Vol: 11,527

Growth: +28%



Lip Blushing

Vol: 5,886

Growth: +68%



Free-From Harsh Chemicals

Vol: 152

Growth: +64%



Plant Power

Vol: 472

Growth: +54%



Sun Damage

Vol: 4,590

Growth: +14%

PRODUCT FORMATS



Lip Jellies
TPV #272
Vol: 1275
Growth: +21%



Lip Plumping Balm
TPV #720
Vol: 162
Growth: +46%



Serum Lip Gloss
TPV #1317
Vol: 37
Growth: +66%



Tinted Lip Conditioner
TPV #1256
Vol: 71
Growth: +16%

BENEFITS



Provides UV Protection
TPV # 17
Vol: 2686
Growth: +18 %



Enhances Colour
TPV # 140
Vol: 232
Growth: + 26%



Nourishes Lips
TPV #310
Vol: 69
Growth: +32%



Promotes Restoration
TPV #105
Vol: 11,315
Growth: +26%

Innovation springboard

We've put together a springboard of product formats, ingredients and benefits associated with the emerging needs in the lips space.

We've prioritized **UV Protection**, **Enhances Color** and **Restores Lips** as benefits to target.

Functional ingredients like **Indian Gooseberry**, **Polyglutamic Acid** and **Kakadu Plum** help to target these needs.

We've paired them with **Lip Jellies**, **Serums** and **Conditioners** – formats which are becoming more and more popular.

INGREDIENTS



Indian Gooseberry
TPV #29
Vol: 187
Growth: +35%



Polyglutamic Acid
TPV #13
Vol: 195
Growth: +54%



Kakadu Plum
TPV #44
Vol: 113
Growth: +48%



Microalgae
TPV #4
Vol: 292
Growth: +30%

THEMES



EWG-Verified
TPV #457
Vol: 289
Growth: +19%



Ultra-Longwear
TPV #559
Vol: 153
Growth: +16%



Organic Pigment
TPV #583
Vol: 90
Growth: +52%



Natural Beauty
TPV #145
Vol: 30449
Growth: +43%

New product concept

Introducing the TrueTint Lip Enhancing Serum.

This formula helps to revitalize and nourish the lips, bringing out their brighter, natural color.

Ingredients like **Kakadu Plum** are an excellent source of Vitamin C, helping to brighten and plump while promoting collagen production – highlighting the natural color of lips.

Formatting this product as a serum will help to deliver on the hybrid-benefits related to lip restoration.



Trends to leverage for **TrueTint Lip Enhancing Serum**

Skincare Benefits

Replenishes Skin

TPV #276
Vol: 186
Growth: +11%

Nourishes Lips

TPV #310
Vol: 69
Growth: +32%

Claims

Enhances Colour

TPV #140
Vol: 232
Growth: +26%

EWG-Verified

TPV #457
Vol: 289
Growth: +19%

Product Format

Serum Lip Gloss

TPV #1317
Vol: 37
Growth: +66%

Ingredients

Polyglutamic Acid

TPV #13
Vol: 4,195
Growth: +54%

Kakadu Plum

TPV #44
Vol: 113
Growth: +48%

Summary

Short and long-term skin health

Consumers value immediate benefits like hydration and plumpness, as well as long-term skin health advantages like collagen production and rejuvenation.



Skin-loving ingredients

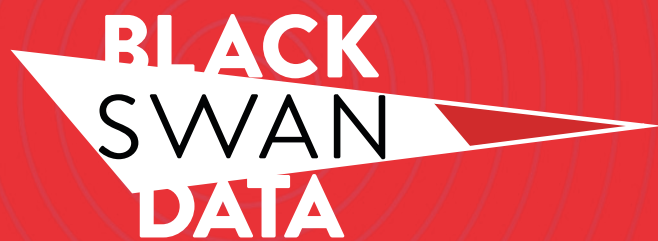
As consumers' understanding of hero ingredients grows, they are prioritizing formulations backed by research to ensure the on-pack benefits are delivered.



Formats that excite

Innovative product formats are captivating consumers by introducing novel ways to experience skincare-infused benefits in cosmetics.





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