

CONSUMER INTELLIGENCE REPORT

NARS Cosmetics

What NARS markets, what is in the bottle, and what buyers actually say.

ONE BRAND, ANALYZED ACROSS FOUR LAYERS

- | | | |
|----|-----------------|-------------------------------|
| 01 | Marketed | What the brand claims |
| 02 | Formula | What the formulations contain |
| 03 | Reviews | What buyers experience |
| 04 | Social | What the market discusses |

The gaps between these four layers are where the findings live.

11K

SOCIAL
POSTS, AT
MINIMUM

7.8K

DISTINCT
CREATORS,
ROUGHLY

20K

RETAIL
REVIEWS,
NEARLY

78

FORMULATIONS
DECODED

EVERY FIGURE TRACED TO SOURCE · COUNTS ARE FLOORS

GROUNDING IN THE INDUSTRY'S OWN WORDS

"One of our biggest challenges as an organization is everything is siloed. No one's getting that full view of our business performance. Finance looks at it through a finance lens, social media through a social media lens, the merchants through a sales lens, we're looking at it through a consumer lens."

KAREN TILLSON, CONSUMER INSIGHTS LEAD, CALVIN KLEIN (PVH), IN CONVERSATION WITH CLAYFACE, JULY 2026

That's why this report exists: to give marketing, finance, merchandising, and consumer insights teams a single, complete view of one brand. Four independent lenses, read against each other, with every figure traced to a source. NARS is the rare case where the layers mostly agree, and the findings are upside the brand has already earned.

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Every finding page follows the same shape: the claim, how confident to be and why, the evidence with its sources, what the data could not reach, and what it means for the decision. Learn the layout once on page 05 and every finding after it reads the same way.

In brief

NARS is a different case from most of the category: a genuinely loved prestige brand whose premium is holding. The opportunities here are not damage to repair; they are validated assets waiting to be used.

- 01** **NARS's most review-validated product, the Radiant Creamy Concealer, is nearly absent from its own social conversation: roughly 240 posts vs 2,300+ for the cheek icons.**
HIGH CONFIDENCE · REVIEWS AND SOCIAL READ AGAINST EACH OTHER, JUL 2026
- 02** **The formulas can back a stronger claim story than the one being told: talc-free is claimed on 25 products while three formulas still carry talc, and the hybrid story leads with complexes instead of the squalane and hyaluronic acid actually there.**
HIGH CONFIDENCE · 78 FORMULATIONS DECODED BRAND-DIRECT, JUL 2026
- 03** **Buyers love the brand, 87% of nearly 20,000 reviews sit at four or five stars, and they name one fixable complaint: drying, now attaching to the Natural Matte Longwear launch.**
HIGH CONFIDENCE · WALMART-SYNDICATED REVIEWS; LAUNCH WAVE STILL FORMING
- 04** **The market frames NARS as affordable luxury next to Charlotte Tilbury and Chanel, and the dupe pressure eroding rivals is a rounding error here, roughly 1.7% of the conversation.**
HIGH CONFIDENCE · AT LEAST 11,000 POSTS, ROUGHLY 7,800 CREATORS, JUL 2026
- 05** **NARS has no authorized Walmart storefront while resellers hold all 122 listings; nothing has broken yet, which makes now the cheapest moment to take control.**
HIGH CONFIDENCE · ALL 122 LISTINGS LIVE-VERIFIED, JUL 2026

START HERE

Put the Radiant Creamy Concealer into the creator program, using the review language buyers already wrote.

BRAND MARKETING AND SOCIAL · 30 DAYS

Highest-return, lowest-cost move in the report. The proof already exists; it just is not in the conversation yet.

THEN, IN ORDER OF PAYOFF:

- | | |
|--|---|
| Defend the premium on desirability, not price. | BRAND MARKETING · NEXT CYCLE |
| Reformulate the three talc products, then own the claim brand-wide. | PRODUCT DEVELOPMENT · TWO QUARTERS |
| Answer the acne-safety question with formula facts. | BRAND MARKETING · ONE QUARTER |
| Watch the matte-foundation launch reviews in real time. | INSIGHTS AND PRODUCT · THIS LAUNCH WINDOW |

BACKGROUND

The brand in context

- Founded in 1994 by makeup artist François Nars, who remains Founder and Creative Director. Acquired by Shiseido in 2000.
- NARS crossed one billion dollars in global retail sales in 2019 (company-reported). Shiseido has not reported it separately since, so no current revenue figure appears in this report.
- Positioning is prestige artistry: provocative product naming (Orgasm, Laguna, Climax), an editorial heritage, and a set of TikTok-viral complexion and cheek heroes.
- Distribution runs through its own site, Sephora, Ulta, and department stores. NARS has no authorized presence on Walmart, which matters later in this report.
- Roughly 90 current products, predominantly color cosmetics, with a small Light Reflecting skincare line; 78 of them publish full ingredient lists, and those are the formulations we decoded.
- The current commercial push is the Natural Matte Longwear Foundation, which makes the launch-review signal in Finding 03 timely.

Three product families carry the story

The cheek icons

Orgasm blush and Laguna bronzer: the brand's cultural signature and the engine of its social conversation.

The complexion workhorses

Radiant Creamy Concealer, Light Reflecting and Sheer Glow foundations: where buyers place their trust and leave their reviews.

The lip range

Powermatte, Afterglow, Audacious: broad, well-reviewed, and the one place the texture criticism concentrates.

FINDING 01 · THE HERO GAP

HIGH CONFIDENCE

The hero the reviews validate is nearly absent from the conversation

High confidence: the deepest review base in the catalog read against the full social pull. Invisible from either layer alone.

In the reviews, one product stands far above the rest. The Radiant Creamy Concealer is the most-reviewed product in the catalog by a wide margin, and buyers describe it the way brands hope to be described. In the social conversation, that same concealer barely registers: the cheek icons own the culture, and the product with the deepest proven trust is close to silent where discovery now happens.

4.9K

REVIEWS PER SHADE

Radiant Creamy Concealer review depth across its shade range, the deepest in the catalog.

4.7

AVERAGE STARS

Buyers treat it as a staple: "the best concealer I've ever used."

240

CONCEALER POSTS

Social posts featuring the concealer, at minimum. Discovery now happens here.

2.3K

CHEEK-ICON POSTS

Posts carried by Orgasm blush and Laguna bronzer, at minimum. The culture is earned.

WALMART-SYNDICATED REVIEW · JUL 2026 PULL

"The best concealer I've ever used."

WALMART-SYNDICATED REVIEW · JUL 2026 PULL

"Covers all my red pimples for real."

WHY IT MATTERS

Most brands would kill for this problem. NARS is sitting on a mountain of independent, buyer-written validation for a hero product and has not yet converted it into social presence. The blush and bronzer conversation is a genuine asset to protect; the concealer is a growth lever the brand has already earned and has not pulled. Proof written by buyers travels further than proof written by marketers.

WHAT THE INDUSTRY TOLD US

"If you go by the syndicated data, probably only the top performers will come up. We tell the tool many times, but they don't catch, they only catch the top ones. We want to know the niche. That's the trick."

FAIZA NAFIS, CONSUMER INSIGHTS, PEPSICO, ON WHY LOUDEST-WINS TOOLS KEEP TEAMS BLIND TO EVERYTHING BUT THE TOP SIGNALS, IN CONVERSATION WITH CLAYFACE, JULY 2026

The hero gap is exactly that niche signal: social alone says the cheek icons are the story, reviews alone say the concealer is. Only the cross-read surfaces it.

HONEST LIMIT

Review depth is from the Walmart-syndicated sample; owned-channel data would confirm the rates.

SO WHAT

The highest-return move in this report costs a creator brief, not a reformulation.

FINDING 02 · CLAIMS VS. FORMULA

HIGH CONFIDENCE

The formulas can back a stronger claim story than the one being told

High confidence: re-derived line by line from 78 raw ingredient lists. Ingredient lists (INCI lists) run highest concentration first, so position shows what does real work.

25

PRODUCTS CLAIM TALC-FREE

NARS's second-most-repeated exclusion on the "formulated without" banner. Shoppers clearly care.

3

FORMULAS STILL CARRY TALC

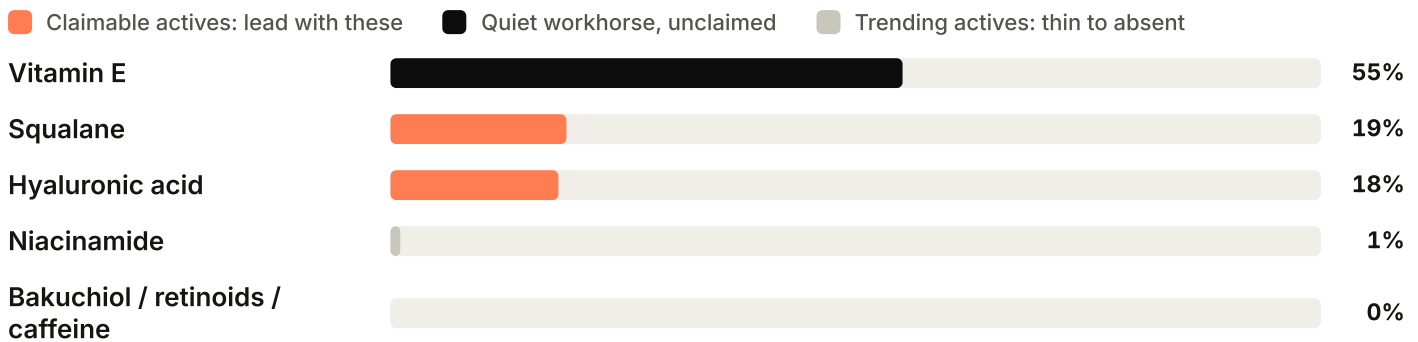
A primer (fourth ingredient), an eyeshadow palette (first ingredient), and a tinted moisturizer.

0

MISCLAIMS FOUND

Every individual label is accurate; none of the three claims talc-free on its own page.

What the formulations actually run on (share of 78 decoded formulas)



The genuine, claimable actives are squalane and hyaluronic acid. The trending actives consumers search for are thin to absent, and vitamin E is the quiet workhorse: in more than half the formulas, marketed almost nowhere.

- Talc-free is three reformulations from being ownable.** The 25 claims are honest and show NARS knows shoppers care, but shoppers judge at brand level, and the talc conversation is live with competitors actively claiming it. Reformulate the three and the claim becomes genuinely ownable, decided with data rather than discovered by a critic.
- The hybrid story has better proof than it currently uses.** NARS markets its complexion heroes as skincare-makeup hybrids, carried by proprietary complexes and botanicals. The stronger version of the story is already in the bottle: lead with the squalane and hyaluronic acid the formulas genuinely contain.
- Vitamin E is unclaimed equity.** Present in 55% of formulations and marketed almost nowhere, the same quiet-workhorse pattern seen across the category. A modest, opportunistic lever, since NARS buyers talk finish and shade, not ingredients.

HONEST LIMIT

Marketed claims read from narscosmetics.com product pages (Jul 2026); claim copy changes silently. NARS lists one INCI per product with shade variation in a may-contain block.

SO WHAT

Most of this is a messaging upgrade the formulas already paid for. The one product move is three talc reformulations.

FINDING 03 · VOICE OF THE BUYER

HIGH CONFIDENCE

Buyers love the brand and name one fixable complaint: drying

High confidence on the patterns: nearly 20,000 Walmart-syndicated reviews, 87% at four or five stars. The launch wave is Medium-High and still forming.



RADIANT CREAMY CONCEALER

The validated hero, without a caveat

Unlike hero concealers elsewhere that buyers love but flag for dryness, NARS's concealer draws consistent, uncomplicated praise for coverage and finish. It is the anchor the rest of the report builds on.



THE LIP RANGE

Where the one complaint concentrates

"Lips always feel dry after an hour or so." "Nice colour but drying." More important commercially, the same criticism is now attaching to the Natural Matte Longwear Foundation launch: "dry, cakey, thick," "you can see every pore." That is a live launch signal worth tracking in real time.

- **The premium reads as worth it.** "Worth every penny." "A steal for the eleven bucks." "So worth the more expensive price." The occasional too-expensive comment is the minority view.
- **On deep shades, NARS is a relative strength with narrow friction.** Deep-skin buyers are vocal advocates for the cheek icons ("so beautiful on dark skin, the best blush ever"). The friction is product-specific lip payoff ("didn't really show up on my lips"). Protect the advocacy, address the specific cases.

WHAT THE INDUSTRY TOLD US

"One goal being to understand how consumers are perceiving new products that are launched. So every season, if there's a new product, we need to say how it's doing, so that we could bring it to the attention of the teams when the consumer starts to notice that things are different."

RANDYLL BROOKS, CONSUMER RESEARCH MANAGER, CALVIN KLEIN, ON WHY LAUNCH-WINDOW REVIEW TRACKING EXISTS, IN CONVERSATION WITH CLAYFACE, JULY 2026

The Natural Matte launch is that window, open now: the complaint is identified, bounded, and early enough to act on before the narrative sets.

HONEST LIMIT

Reviews come through the Walmart marketplace, where NARS has no storefront: verified-purchase syndicated reviews, genuine sentiment, but a sample rather than the owned-channel voice.

SO WHAT

One texture fix and one launch watch protect an otherwise validated catalog.

FINDING 04 · THE CONVERSATION

HIGH CONFIDENCE

The market grants NARS "affordable luxury," and dupes barely touch it

High confidence on themes, reach, and framing; sentiment used directionally only, since captions cannot carry precise sentiment.

NARS commands a large, healthy conversation, carried almost entirely by TikTok, with Reddit as a small, calmer channel. The tone runs strongly positive, in line with the review picture.

11K

NARS POSTS

Posts captured across TikTok and Reddit. Every count on this page is a floor.

7.8K

DISTINCT CREATORS

The conversation is broad-based, not dependent on a handful of big names.

6:1

POSITIVE TO NEGATIVE

Directional read of caption tone; it matches the 87% four-and-five-star review base.

1.7%

DUPE SHARE

Share of the conversation positioning NARS against cheaper alternatives. A rounding error.

The identity

Orgasm blush and Laguna bronzer dominate, and blush placement is the single largest content theme. This is NARS's cultural signature, and it is earned.

The descriptor

"Affordable luxury": aspirational, named in the same breath as Charlotte Tilbury, Chanel, and Armani, and positioned as the worth-it choice rather than the unreachable one.

The dupe picture

Where dupe culture is eroding rivals, it barely registers here. The few comparisons that appear are the exception. The premium holds, which makes it worth defending on desirability, not discounts.

The open question

The community's one recurring ingredient question is "will it break me out," clustered on the complexion products. It is still open, and NARS has the formula facts to answer it. Free trust.

HONEST LIMIT

Captions are creator and affiliate-led (#NARSPartner sits among the highest-reach content), so this layer shows what attracts attention, not precise sentiment. Candid criticism lives in the reviews.

SO WHAT

The premium is granted and barely contested. The open question is the cheapest trust NARS can buy.

FINDING 05 · CHANNEL WATCH ITEM

HIGH CONFIDENCE

No authorized Walmart presence, and the cheapest moment to act is before anything breaks

High confidence on the facts: all 122 listings live-verified on Walmart.com, Jul 2026. Framed as a watch item, not a crisis.

NARS has no authorized storefront on Walmart, yet a full reseller shelf exists there: 122 listings, all held by third-party sellers (Adina's Beauty Store, Hays Trading, Milano Prime, the same reseller network seen across prestige beauty). A marketplace seller is a third party selling on a retailer's site; these are unauthorized resellers, sellers with no distribution agreement with the brand.

122

LISTINGS, ALL THIRD-PARTY

Every NARS listing we examined on Walmart.com is held by a reseller, not NARS or Walmart.

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OFFICIAL STOREFRONTS

NARS does not distribute through Walmart; this shelf exists without the brand's participation.

0

RATINGS DAMAGE OBSERVED

Reviews on these listings are genuine syndicated product reviews so far, not damaged-shipment complaints.

Nothing has broken yet: the reviews are genuine product reviews and there is no ratings damage to date, which is exactly why nobody is watching this channel. Elsewhere in prestige beauty the same reseller pattern has matured into expired product, one-star reviews, and price erosion. Acting now, bringing the resellers into an authorized program or claiming the listings, buys price and stock control at the lowest possible cost: before there is damage to repair.

WHAT THE INDUSTRY TOLD US

"As soon as you include that third-party wholesaler, you lose a lot of visibility. And so for us that was really critical to get accurate data."

KIRSTEN ANDERSON, FORMERLY E-COMMERCE COMMERCIAL LEAD, ESSILORLUXOTTICA NORTH AMERICA, IN CONVERSATION WITH CLAYFACE, JULY 2026

The visibility she describes losing is what this finding restores: a reseller shelf that no owned-channel dashboard shows, mapped before it costs anything.

HONEST LIMIT

122 listings is the audit window; reseller sets churn, so the true set can only be larger over time.

SO WHAT

A brand-protection move made before damage appears is the cheapest version of that move.

SYNTHESIS

Say vs. Do: where the four layers meet

Each row reads across: what NARS claims, what the formulation or product delivers, what buyers report, and what the market amplifies. The type of gap is the finding.

CLAIM	IN THE BOTTLE	BUYERS REPORT	MARKET AMPLIFIES	GAP TYPE	THE MOVE
(silent) the concealer as hero	delivers: 4.7 stars, most-reviewed by far	"best concealer I've used"	roughly 240 posts, barely present	UNDER-LEVERAGED ASSET	Put the review-proven workhorse into the social story
"Formulated without talc" on 25 products	3 formulas still carry talc, one at first position	not raised	zero talc credit yet; rivals claim it	PORTFOLIO CONSISTENCY	Reformulate the three, then own the claim
"70% skincare" hybrid	squalane 19% and hyaluronic acid 18% real; niacinamide 1%	"will it break me out?" still open	acne-safety is the live question	MARKETED BROAD, PROVEN NARROW	Lead with the actives it has; answer with facts
Prestige premium price	n/a, pricing not formula	"worth every penny," "a steal"	"affordable luxury," dupes 1.7%	VALIDATED: PREMIUM HOLDS	Defend on desirability, not discounts
Comfortable lip and matte wear	drying on the lip range and the new matte foundation	"lips feel dry," "cakey, every pore"	launch review wave forming	VALIDATED, ONE FLAW	Fix the lip dryness; watch the launch

THE PATTERN THAT MATTERS

NARS's gaps are the opposite of what most audits find. The products deliver, the buyers are loyal, and the premium holds. The gaps are under-claim and under-leverage: a validated hero waiting to be amplified, a premium that can be defended with confidence, and a talc-free claim three reformulations from being ownable. Most of this is a marketing and merchandising upgrade rather than a repair job. The single genuine product fix is the lip and matte-foundation dryness.

ON A SEPARATE AXIS

The Walmart channel item sits on a separate axis from claims and formulas, which is why it has its own finding (05) and its own owner. A claims lens alone would never surface it.

ACTIONS

Recommended actions

Ordered by expected payoff against effort. Each action names the owning function, so an insights team can route it to the right desk.

01 Put the Radiant Creamy Concealer into the creator program, using the review language buyers already wrote.

FINDING 01 · BRAND MARKETING AND SOCIAL · 30 DAYS

The most-validated product in the catalog is one of the quietest in social. Seed it the way Orgasm and Laguna already are, and lead with the buyer quotes the reviews hand over for free.

02 Defend the premium on desirability, not price.

FINDINGS 03, 04 · BRAND MARKETING · NEXT CYCLE

The market already calls NARS worth it and is not seriously dupe-attacking it. Lean into the affordable-luxury frame and the artistry heritage; a discount posture would give up a position rivals are losing and NARS is keeping.

03 Reformulate the three talc products, then take the claim brand-level.

FINDING 02 · PRODUCT DEVELOPMENT · TWO QUARTERS

Three reformulations convert 25 honest but scattered claims into one ownable, defensible message, closed on the brand's own timetable.

04 Answer the acne-safety question with formula facts.

FINDINGS 02, 04 · BRAND MARKETING · ONE QUARTER

Meet "will it break me out" directly with non-comedogenic and skin-tolerance information, meaning whether a formula is likely to clog pores, and lead the hybrid story with the squalane and hyaluronic acid actually present.

05 Track the Natural Matte Longwear launch reviews in real time.

FINDING 03 · INSIGHTS AND PRODUCT · THIS LAUNCH WINDOW

The drying and cakey-finish feedback is identified, bounded, and early. Address it in product guidance now and in formulation where possible, and fix the lip-range dryness that seeded it.

06 Bring the Walmart resellers into an authorized program, or claim the listings.

FINDING 05 · E-COMMERCE AND LEGAL · ONE QUARTER

Take control of price and stock while the review picture is still clean. This is the same fix peer brands make after damage appears; making it before costs less.

For routing: brand marketing owns 01, 02, and 04. Product owns 03 and shares 05 with insights. E-commerce and legal own 06.

NEXT IN EVIDENCE

What we would need to be more certain

Each item names the finding it strengthens, the missing evidence, and roughly what it takes. A bridge to the next project, not a research plan.

FINDING 03 · LAUNCH MONITOR

A weekly review pull on the Natural Matte Longwear Foundation through the launch window. The wave is still forming; a monitor turns a Medium-High read into a live dashboard.

FINDINGS 01, 03 · OWNED-CHANNEL REVIEWS

First-party review data from Sephora, Ulta, and narscosmetics.com. The Walmart-syndicated sample is deep and consistent; owned-channel data would confirm the rates and the hero ranking.

FINDING 04 · CONVERSATION DEPTH

Creator-tier and geographic breakdowns, which were not available for this pull, would show who carries the conversation and where the affordable-luxury framing is strongest.

FINDING 02 · SHADE-VARIANT SWEEP

A full pass through the may-contain shade blocks would bound the talc reformulation scope precisely, since NARS lists one ingredient list per product with shade variation separate.

METHOD

Method, sources, and limits

FORMULAS

Decoded brand-direct from narscosmetics.com (78 products with full ingredient lists, of roughly 90 in catalog), re-derived line by line from the raw lists, Jul 2026. We avoided ingredient databases, which lag reformulations by years.

REVIEWS

Walmart marketplace: 122 listings carrying nearly 20,000 verified-purchase syndicated reviews, captured Jul 2026. NARS has no authorized storefront there, so this is a sample of genuine product sentiment, not the owned-channel voice.

SOCIAL

Proprietary listening across TikTok and Reddit, scoped to NARS and its heroes by keyword and hashtag, captured Jul 2026. All counts are floors: minimum verified numbers, the true figures can only be higher. Sentiment used directionally only.

CHANNEL

All 122 Walmart listings live-verified against the site, Jul 2026, seller by seller. The reseller set observed in the audit window; sets churn over time.

INDUSTRY VOICE

Operator quotes are condensed for length from recorded Clayface conversations. The wording is the speaker's own, verified against the transcript; filler removed, nothing added. Speakers describe industry-wide problems, not NARS.

CONFIDENCE AND STANCE

Every finding carries its confidence rating and basis at the top, where the claim is made. Where NARS earns credit, a validated hero, a holding premium, deep-shade advocacy, and a broad creator base, we say so.

Every quote and figure in this report traces to a specific source in our evidence file, available on request.

REFERENCE

Glossary

Every term below is also explained in one clause the first time it appears in the report. This page is the second chance, for the reader who jumped straight to a finding.

Affiliate seeding

Sending product and commissions to many creators so they post about it at volume.

Dupe

A lower-priced product marketed, or adopted by consumers, as a near-substitute for a branded hero product.

Floor

A minimum verified count. The true number can only be higher.

INCI list

The standardized ingredient list on a cosmetic product, ordered by concentration, highest first.

Marketplace seller

A third party selling on a retailer's website, as distinct from the retailer itself.

Non-comedogenic

Formulated to be unlikely to clog pores; the substance of the "will it break me out" question.

Syndicated reviews

Verified-purchase reviews collected on one platform and republished across retail sites; genuine sentiment, but not tied to one storefront.

Talc

A mineral filler common in powder makeup; "talc-free" is a widely used reassurance claim.

Unauthorized reseller

A marketplace seller offering a brand's product without a distribution agreement with the brand.

YOUR TURN

What would this report say about your brand?

Your buyers are already talking, in reviews, on TikTok, on Reddit. Somewhere in that conversation, your Finding 01 is sitting unread. Tell us the brand, and we'll put your report on your desk.

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