



**QUARTERLY
BEAUTY RANKINGS
THE
CHERRY ON TOP
BEAUTY REPORT** Q2 2020

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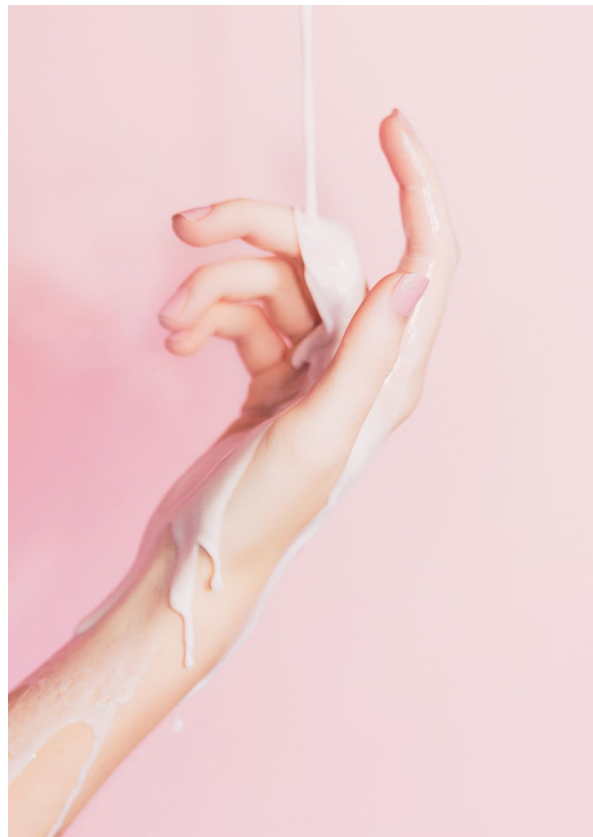
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Email us with any suggestions or requests on how to take this report to the next level. We read every email, and we'd love to hear from you. And please feel free to share this pdf!

A letter from our founders—

After months of protest, the public doesn't just want more lip service from the beauty brands they buy from, they want action. Namely, a detailed plan for how these companies plan to tackle systemic racism.

Aurora James, the creative director and founder of Brother Vellies, offered up a framework for how to begin making these changes by launching the 15 percent pledge, which calls on all retailers to pledge 15% of their shelf space to Black-owned businesses. Sephora was the first to step up and join the pledge, revealing that they only carry 7 Black-owned brands.

Uoma's founder and CEO Sharon Chuter launched Pull Up or Shut Up, an initiative asking companies to release the number of Black employees they have in their organizations at the corporate level as a way to use transparency to hold these businesses accountable and encourage change.

While this is only just the beginning, both trailblazing proposals have the potential to instigate major, long overdue shifts throughout the industry. Both also demonstrate that the times are changing and the status quo is no longer acceptable to customers. We here at Cherry Pick are dedicated to continuing to do our part to bring these inequities to light and create a more inclusive, representative beauty industry.

With Love
Cherry Pick

Contents/ This Month's Beauty Hot Takes

Lockdown leads to a boom in skincare and at-home hair dye

Buyers are taking all the money they'd usually invest in the latest Morphe eye palette or Fenty bronzer and getting back to basics. With less time spent at events and in the office, customers are naturally gravitating away from color cosmetics towards skincare. After all, days spent indoors provide the perfect opportunity to luxuriate in multi-step regimens and an endless array of face masks. The pandemic has also led to a renewed interest in hair color as highlights fade and many salons remain unable to reopen. There's no better time to test out a daring new look, after all, than when nobody is around to see the potentially disastrous results of your first foray into at-home hairdressing.

Consumers are becoming more conscientious

Customers don't just want to spend their money on something pretty. They want to invest in something that looks good and does good too. People are doing more due diligence when it comes to where they shop, investigating brands values, labor practices, and stances on important cultural issues to make sure corporate beliefs align with their own. This can be seen not only in customers' increased patronage of Black-owned businesses in support of the Black Lives Matter movement, but also the consistent interest in vegan, cruelty-free, sulfate-free, paraben-free, and phthalate-free products which can be seen in our reports month after month across categories.

Content creation is severely disrupted

The pandemic has dramatically disrupted the content creation engine for brands. Brands can no longer take influencers on expensive trips or shoot huge campaigns, you literally cannot do a photoshoot in the same way. However, disruption leads to constraints, constraints necessitate creativity, and creativity leads to authenticity, and authenticity generates demand. Brands who are winning have quickly tapped into more innovative methods of creating content: art directed, FaceTime photoshoots or celebrity at-home tutorials, etc.

How does our data work?

We track products, not people.

Every single day, the masses of beauty consumers on social media comment on tens of thousands of images and videos containing beauty products, saying things like **“I WANT THIS”** and **“NEED!!!”**. Consumers are literally telling us what products they want.

At Cherry Pick, we leverage the latest in AI to track these valuable expressions of what consumers think and feel about every single beauty product on the planet.

This rich information then gets distilled into one simple, easy to understand score that can be used to evaluate the demand for the attributes, products, brands, and categories in the market:

POPI Score: The relative % of demand for a specific product across social media

Why does our data matter?

What cruelty-free eyeshadow do they want?

Rather than monitoring for keywords like “eyeshadow,” we extract products from all images and video on Instagram. No matter which beauty account the product is posted on (brand account, influencer, retailer, competitor), we track the desire and attribute it to the product.

Why? It's simple. Brands don't sell content, they sell products. When consumers post a comment (showing either positive or negative sentiment), they do not generally mention the products by name. Consumers react to the content that contains the products. The positive and negative fluctuations of sentiment on social content may have many sources that are not specifically tied to product, prohibiting the accurate determination of the users' positive or negative feelings. Not having product tracking capabilities limits data mining and analytics.

At Cherry Pick, we believe the new marketers in beauty are the consumers themselves. Likes, impressions, sentiment, and sales data alone do not tell the entire picture of which products the consumer wants and how to possibly impact their actions. By listening to them in a new way, we provide a deeper analysis of how they feel and think beyond what anyone else offers.

Top Rankings: Color Cosmetics

TOP 5 BRANDS

	POPI	RANK CHG
1. ColourPop Cosmetics	6.11%	-
2. Fenty Beauty by Rihanna	4.24%	4
3. Kylie Cosmetics	3.72%	9
4. Jeffree Star Cosmetics	3.67%	-1
5. Huda Beauty	3.56%	-3

TOP 5 RISING BRANDS

The fastest growth in demand YOY

#1 Mellow	480.52%
#2 Iconic London	417.67%
#3 Fresh	318.11%
#4 Wander Beauty	316.51%
#5 UOMA Beauty	236.95%

TOP 5 FALLING BRANDS

The steepest decline in demand YOY

#1 Black Moon	-83.21%
#2 PUR	-83.19%
#3 Lime Crime	-82.27%
#4 Laura Lee Los Angeles	-81.38%
#5 Flower	-80.92%

TOP 5 PRODUCTS



#1
ColourPop Cosmetics
Super Shock Shadow



#2
Benefit Cosmetics
Precisely, My Brow Pencil



#3
Huda Beauty
Obsessions Eyeshadow Palette



#4
Jeffree Star Cosmetics
Jawbreaker Palette



#5
Huda Beauty
#FauxFilter Foundation

Top Rankings: Skincare

TOP 5 BRANDS

	POPI	RANK CHG
1. Fourth Ray Beauty	7.42%	5
2. Kylie Skin	4.44%	-1
3. Charlotte Tilbury	3.92%	59
4. Pixi	3.31%	-3
5. OleHenriksen	2.79%	-

TOP 5 RISING BRANDS

The fastest growth in demand YOY

#1 ILIA	718.22%
#2 Malin + Goetz	568.87%
#3 Tula	413.52%
#4 Skin & Co	354.56%
#5 Josie Maran	297.31%

TOP 5 FALLING BRANDS

The steepest decline in demand YOY

#1 Fenty Beauty by Rihanna	-97.47%
#2 ColourPop Cosmetics	-96.45%
#3 First Aid Beauty	-93.28%
#4 The Body Shop	-89.35%
#5 Barry M	-89.33%

TOP 5 PRODUCTS



#1
Kylie Skin
Foaming Face Wash



#2
Farsali
Rose Gold Skin
Mist



#3
Fenty Beauty
by Rihanna
PRO KISS'R
Lip Loving Scrubstick



#4
Murad
Retinol Youth
Renewal Night
Cream



#5
Farsali
Haldi Eyes

Top Rankings: Bath Body

TOP 5 BRANDS

	POPI	RANK CHG
1. ColourPop Cosmetics	9.79%	1
2. Fenty Beauty by Rihanna	5.52%	4
3. Sol De Janeiro.....	5.36%	7
4. First Aid Beauty	3.39%	57
5. Olay	3.00%	116

TOP 5 RISING BRANDS

The fastest growth in demand YOY

#1 Revolution	679.30%
#2 Megababe	167.27%
#3 Sol De Janeiro	162.13%
#4 MAC	128.19%
#5 Fenty Beauty by Rihanna	50.78%

TOP 5 FALLING BRANDS

The steepest decline in demand YOY

#1 Erno Lazlo	-94.87%
#2 Philosophy	-93.24%
#3 Clinique	-92.95%
#4 Love Beauty and Planet	-91.23%
#5 Pinrose	-90.90%

TOP 5 PRODUCTS



#1
Huda Beauty
N.Y.M.P.H. Not.
Your. Mama's.
Panty. Hose



#2
Anastasia Beverly Hills
Shimmer
Body Oil



#3
Merci Handy
Hand Cleansing
Gel



#4
Merci Handy
Hand Cream



#5
Fenty Beauty by Rihanna
Body Lava

Top Rankings: Hair

TOP 5 BRANDS

	POPI	RANK CHG
1. Arctic Fox	6.06%	1
2. Joico	3.51%	58
3. Wella Hair	3.33%	3
4. Camille Rose Naturals	3.22%	32
5. Mielle Organics	2.86%	1

TOP 5 RISING BRANDS

The fastest growth in demand YOY

#1 Camille Rose Naturals	323.96%
#2 Dyson Hair	221.36%
#3 Alikay Naturals	111.91%
#4 Drybar	82.46%
#5 Wella Hair	31.21%

TOP 5 FALLING BRANDS

The steepest decline in demand YOY

#1 Matrix	-90.76%
#2 Amika	-89.30%
#3 Living Proof	-85.79%
#4 Redken	-84.93%
#5 DevaCurl	-77.03%

TOP 5 PRODUCTS



#1
Redken
Shades EQ Color
Gloss Hair Color



#2
Arctic Fox
Semi-Permanent
Hair Color



#3
Amika
Polished
Perfection



#4
Living Proof
Full Dry
Volume Blast



#5
Olaplex
No. 3 Hair
Perfector