



**THE  
CHERRY ON TOP  
BEAUTY REPORT**

JULY 2020



# THE CHERRY ON TOP BEAUTY REPORT

July 2020, Skincare

## CEO

Justin Stewart  
justin@cherrypickai.com

## COO

Melissa Munnerlyn  
melissa@cherrypickai.com

## Contributing Writers

Emily Kirkpatrick



COVER PHOTO BY COTTON. IMAGE ABOVE BY SCOTT WEBB.

Cherry Pick  
190 Bowery, Floor 2  
New York, NY 10012  
sales@cherrypickai.com | cherrypickai.com

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—

In May, states began to reopen and people tentatively returned to restaurants, parks, beaches, and business as usual. But it's not just our relationship to public spaces and face-to-face contact that's been irrevocably altered, the way we use cosmetics and approach beauty also appears to have totally shifted after months spent indoors and most often makeup-free.

However, while cosmetics sales may continue to lag, the skincare industry is booming as people get serious about their self-care routines whether they're still in quarantine or back out in the world. For May, Cherry Pick decided we should also shift our coverage to reflect customer's changing focus. So instead of cosmetics, this month we're tracking the skincare categories and products shoppers can't get enough of.

As summer heats up, customers are looking for cleansers that multitask (p. 7), toners that will brighten their complexion (p.8), and masks that hydrate (p. 11). With activism increasingly on the rise, it also shouldn't be surprising that skincare is seeing the effect of health and eco-conscious consumers who are overwhelmingly showing demand for paraben-free products.

With Love  
Cherry Pick

---

# Contents/ This Month's Beauty Hot Takes

---

## 7 **Cleanser: The more hydration the better when it comes to summer cleansers**

The heat of summer means that constant sweating is pretty much a guarantee and customers are looking for any way to rehydrate aside from chugging water all day. So it makes sense that people are picking up cleansers that promise maximum hydration—the number one benefit shoppers searched for in July. The Top 5 Products this month also feature all-star moisture-drenched ingredients like hyaluronic acid, glycerin, kiwi seed oil, and quince.

## 8 **Toner: Customers want toner with a natural twist**

When it comes to toner, customers are leaning towards products that produce noticeable results like brighter, more hydrated skin with even tone and texture, but with natural ingredients mixed in. The brands that made the Top 5 Products list all feature super effective chemical ingredients like hyaluronic acid and AHAs, alongside all-natural elements like rose, lemon, vanilla, chamomile, dragon fruit, and aloe.

## 9 **Treatments: Antioxidant and vitamin C serums have become a skincare staple**

Serums are undeniably the most popular facial treatment amongst shoppers, taking four of the five spots on the Top Products list in the Treatment category. But it's not just the formulation users find so appealing, it's also all those active ingredients and skin-perfecting elements packed into one easy step. Shoppers most-wanted ingredients were vitamin C and antioxidants that promise to deliver a more glowy, balanced complexion.

## 10 **Moisturizer: Buyers are becoming self-taught skincare experts and digging into the ingredients label**

Customers are turning their skincare routine into a part time job, going beyond pretty packaging, sweet scents, and celebrity endorsements in favor of key ingredients that really work. While hyaluronic acid is still king, buyers are moving beyond buzzwords and getting into the nitty-gritty, overwhelmingly searching for moisturizers with glycerin as the main ingredient—a super effective humectant that helps balance the moisture in skin.

## 11 **Mask: Customers are craving summer fruits like watermelon and kiwi even in their skincare**

Since international travel is a no-go for the foreseeable future, that means a tropical vacation is off the table this summer. But shoppers' are finding a way to get their getaway fix by buying face masks that feature super summery fruits. Both watermelon and kiwi made appearances on the Top 5 Ingredients list this month for masks, and two of the Top 5 Products also featured Watermelon while a third tossed in papaya extract for a little extra exfoliation.

---

## 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 Brands: Skincare

<u>Top 10 Brands</u>		<u>POPI</u>	
Kylie Skin		11.92%	↑9
Fenty Beauty by Rihanna		5.61%	↑59
Too Faced		4.41%	↑25
Fourth Ray Beauty		3.02%	↓4
Pixi		2.90%	↓4
Fresh		2.16%	↓3
Dr. Dennis Gross Skincare		2.01%	↑99
OleHenriksen		1.80%	↓3
La Mer		1.70%	↑51
Glow Recipe		1.69%	↓2



## Massive beauty sales help interest in La Mer soar

La Mer has long had a reputation for excellent products, but also an unattainable price point for most customers. Especially when those customers are taking a risk on the brand and splurging on their products for the first time. But when the summer beauty sales hit at major retailers like Nordstrom and Costco, buyers jumped at the chance to snap up some of these luxe products at a more budget-friendly price, helping the brand jump 51 spots up the Top Brands list to take the ninth spot.



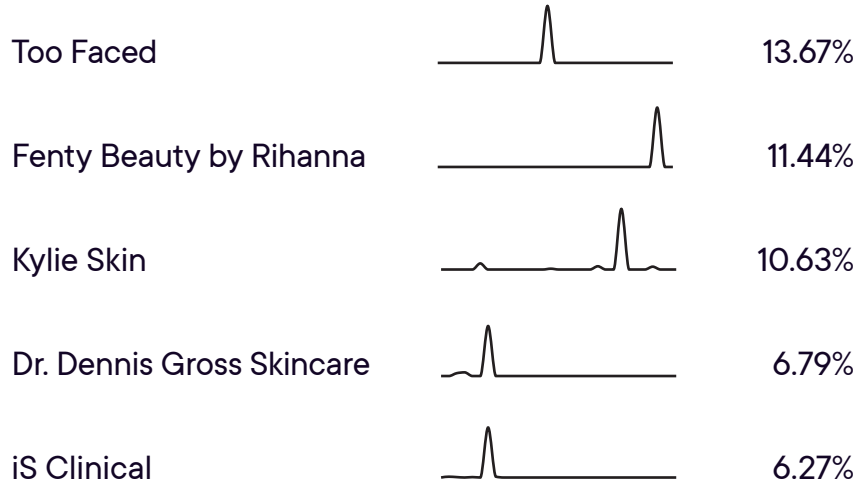
## Fenty Skin sees big success by launching with unexpected celebrity spokesmodels

While the celebrity spokesmodel is a classic trope of beauty brands, in typical Fenty fashion, Rihanna found a way to turn that old business model on its head. The pop star surprised fans and grabbed headlines by launching her skincare line with a handful of female and male stars as the faces of her first campaign. With big names like A\$AP Rocky and Lil Nas X joining the Bad Gal for the launch of her first skincare line, it's no wonder she instantly found major success, jumping to the top of the pack.

# Top Rankings: Cleanser

## Top 5 Brands

## POPI



## Top 5 Products



**#1**  
**Too Faced**  
Hangover Wash  
the Day Away



**#2**  
**Fenty Beauty by Rihanna**  
Fenty Skin - Total  
Cleanser



**#3**  
**Kylie Skin**  
Foaming Face Wash



**#4**  
**iS Clinical**  
Cleansing Complex



**#5**  
**Soap & Glory**  
The Fab Pore

## Top 5 Benefits

Hydrating  
Removes Makeup  
Nourishing  
Removes/absorbs excess oil  
Soothing/calming

## POPI

**15.99%**  
**14.00%**  
**10.32%**  
**8.58%**  
**8.31%**

## Top 5 Claims

Cruelty-free  
Sulfate-free  
Vegan  
Gluten-free  
Paraben-free

## POPI

**14.63%**  
**14.48%**  
**14.26%**  
**12.65%**  
**9.52%**

## Top 5 Ingredients

Glycerin  
Vitamin E  
Coconut  
Vitamin C  
Salicylic acid

## POPI

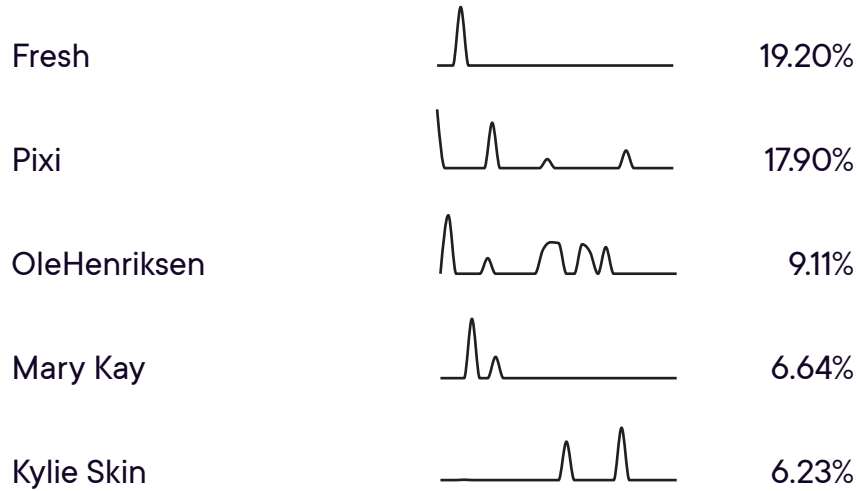
**16.76%**  
**11.58%**  
**11.24%**  
**10.51%**  
**10.02%**



# Top Rankings: Toner

## Top 5 Brands

## POPI



## Top 5 Products



**#1**  
**Fresh**  
Rose & Hyaluronic Acid  
Deep Hydration Toner

**#2**  
**Pixi**  
Clarity Tonic

**#3**  
**OleHenriksen**  
Glow2OH Dark Spot  
Toner

**#4**  
**Kylie Skin**  
Vanilla Milk Toner

**#5**  
**Mary Kay**  
Botanical Effects  
Refreshing Toner

## Top 5 Benefits

Hydrating/Moisturizing  
Calming  
Smoothing  
Softening  
Evens Texture

## POPI

**15.26%**  
**14.31%**  
**10.16%**  
**9.75%**  
**9.63%**

## Top 5 Claims

Paraben-free  
Sulfate-free  
Alcohol-free  
Phthalates-free  
Cruelty-free

## POPI

**18.61%**  
**16.19%**  
**14.36%**  
**13.82%**  
**10.49%**

## Top 5 Ingredients

Glycerin  
Citric Acid  
Rose  
Hyaluronic acid  
Glycolic acid

## POPI



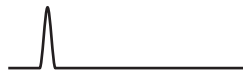


**14.01%**  
**12.01%**  
**11.97%**  
**11.11%**  
**7.28%**



# Top Rankings: Treatments

## Top 5 Brands

## POPI

Fenty Beauty by Rihanna		13.76%
Fourth Ray Beauty		7.84%
Institut Esthederm		5.15%
OleHenriksen		3.60%
Farsali		3.37%

## Top 5 Products



**#1**  
**Fenty Beauty by Rihanna**  
Fenty Skin - Fat Water Toner Serum



**#2**  
**Fourth Ray Beauty**  
Cactus Face Serum Boost



**#3**  
**Institut Esthederm**  
E.V.E. Serum Source



**#4**  
**OleHenriksen**  
Banana Bright Vitamin C Serum



**#5**  
**Farsali**  
Rose Gold Elixir

## Top 5 Benefits

## POPI

Hydrating	<b>17.36%</b>
Brightening	<b>13.89%</b>
Skin balancing/evens skin tone	<b>11.73%</b>
Reduces the appearance of lines and wrinkles	<b>10.63%</b>
Smoothing	<b>9.08%</b>

## Top 5 Claims

Paraben-free
Cruelty-free
Vegan
Antioxidant
Sulfate-free

## POPI

<b>15.17%</b>
<b>14.31%</b>
<b>11.11%</b>
<b>10.71%</b>
<b>10.42%</b>



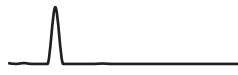


## Top 5 Ingredients

Vitamin C	<b>19.81%</b>
Glycerin	<b>18.41%</b>
Orange	<b>12.15%</b>
Hyaluronic acid	<b>11.79%</b>
Citric acid	<b>8.72%</b>

# Top Rankings: Moisturizer

## Top 5 Brands

## POPI

Merci Handy		14.57%
Fenty Beauty by Rihanna		13.59%
La Mer		6.67%
Fourth Ray Beauty		4.71%
Sunday Riley		3.64%

## Top 5 Products



**#1**  
**Merci Handy**  
Moisturizing Facial Jelly

**#2**  
**Fenty Beauty by Rihanna**  
Fenty Skin - Hydra Vizor  
Invisible Moisturizer  
+ SPF

**#3**  
**La Mer**  
Crème de la Mer

**#4**  
**Too Faced**  
Hangover Good to Go  
Moisturizer

**#5**  
**Sunday Riley**  
Luna Sleeping Night Oil

## Top 5 Benefits

Hydrating	<b>20.21%</b>
Calming	<b>12.47%</b>
Smoothing	<b>9.91%</b>
Reduces lines and wrinkles	<b>9.85%</b>
Rejuvenating	<b>9.09%</b>

## POPI

<b>20.21%</b>
<b>12.47%</b>
<b>9.91%</b>
<b>9.85%</b>
<b>9.09%</b>

## Top 5 Claims

Paraben-free	<b>16.63%</b>
Phthalates-free	<b>12.42%</b>
Cruelty-free	<b>12.40%</b>
Gluten-free	<b>11.98%</b>
Sulfate-free	<b>10.40%</b>

## POPI

<b>16.63%</b>
<b>12.42%</b>
<b>12.40%</b>
<b>11.98%</b>
<b>10.40%</b>

## Top 5 Ingredients

Glycerin	<b>17.32%</b>
Sunflower	<b>11.34%</b>
Hyaluronic acid	<b>9.45%</b>
Vitamin C	<b>9.18%</b>
Shea	<b>8.38%</b>

# Top Rankings: Mask

## Top 5 Brands

## POPI

Florence by Mills		12.62%
Revolution		9.38%
Glow Recipe		6.51%
Huda Beauty		5.55%
Fourth Ray Beauty		5.03%

## Top 5 Products



**#1**  
**Revolution**  
Revolution Skin x Jake  
– Jamie Watermelon  
Hydrating Face Mask



**#2**  
**Florence by Mills**  
Mind Glowing Peel Off  
Mask



**#3**  
**Huda Beauty**  
Wishful Chin Lift  
Sculpting Sheet Mask



**#4**  
**Glow Recipe**  
Watermelon Glow  
Sleeping Mask



**#5**  
**Fourth Ray Beauty**  
A-HA Moment Enzyme  
Mask

## Top 5 Benefits

Hydrating	<b>21.72%</b>
Soothing	<b>15.67%</b>
Reduces lines and wrinkles	<b>10.21%</b>
Brightening	<b>9.54%</b>
Softening	<b>8.48%</b>

## POPI

<b>21.72%</b>
<b>15.67%</b>
<b>10.21%</b>
<b>9.54%</b>
<b>8.48%</b>

## Top 5 Claims

Cruelty-free	<b>14.85%</b>
Paraben-free	<b>13.98%</b>
Phthalates-free	<b>13.63%</b>
Vegan	<b>13.55%</b>
Sulfate-free	<b>13.28%</b>

## POPI

<b>14.85%</b>
<b>13.98%</b>
<b>13.63%</b>
<b>13.55%</b>
<b>13.28%</b>

## Top 5 Ingredients

Glycerin	<b>14.65%</b>
Hyaluronic acid	<b>11.93%</b>
Watermelon	<b>11.82%</b>
Kiwi	<b>10.37%</b>
Castor	<b>9.77%</b>