



**THE
CHERRY ON TOP
BEAUTY REPORT**

APRIL 2020

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April 2020, Color Cosmetics

CEO

Justin Stewart
justin@cherrypickai.com

COO

Melissa Munnerlyn
melissa@cherrypickai.com

Contributing Writers

Emily Kirkpatrick



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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—

We've all had to adjust our lives in order to accommodate the current pandemic and stay safe, and the beauty industry is no exception.

As shelter-in-place orders and social distancing continue people are naturally pivoting away from full glam and looking towards skincare and products that will help enhance their natural beauty (p. 9). But just because most buyers are gravitating towards a more laid-back approach doesn't mean the makeup industry needs to totally panic just yet. There's still plenty of consumer interest in new launches, especially from Fenty Beauty (p. 7), people are loading up on eye palettes (p. 8), and fans are trying to recreate all of Lady Gaga's out-of-this-world Chromatica looks from home (p. 10).

And when you can't see your clients in real life, Pat McGrath knows Instagram Live is the next best thing (p. 6). Until we can all meet again, see you on social media.

With Love
Cherry Pick

Contents/ This Month's Beauty Hot Takes

7 **Cheek: Fenty wins over customers with latest cream blush and bronzer launch**

After many of us have been stuck inside for two months plus, we could all use a little pop of color and Fenty Beauty delivered that in April with the launch of its Cheeks Out Freestyle Cream Blush and Bronzer. The new releases helped the brand move three spots up the Top Brand list, take the top brand spot in Cheek, and the first and third spot in Top Cheek Products, knocking ColourPop down a peg in the category.

8 **Eye: ColourPop continues to edge out the competition with planetary-themed palettes**

But while ColourPop may have lost its hold on the Cheek category, it continued to reign supreme in Eye. The brand was once again #1 and took the top two product slots thanks to the launch of two new eyeshadow palettes tied to the solstice and equinox. With a great price point, consistent new releases, and themes and collaborations that speak to its fanbase, ColourPop is still proving to be the brand to beat.

9 **Face: Customers want to perfect their skin, not cover it**

With most interactions taking place over FaceTime, it's clear that foundation is out the door for now. For the present moment, it's all about treating your skin right in order to create the perfect palette for when we all do start wearing a full face of makeup again. Benefit Cosmetics primers took the #1 and #5 spots on the Top Face Products list, while ColourPop's Hyaluronic Acid Tinted Moisturizer landed at #2 and Milk Makeup's Glow Oil came in #3.

10 **Lip: Anticipation for Chromatica drives sales of Haus Labs**

Lady Gaga continues to be her own best spokeswoman. The sales for her makeup brand, HausLabs, seem to closely correlate with the release of new music from the pop star. So it makes sense that as the release date for her now-postponed album Chromatica came and went, interest in her makeup line also peaked. With a new release date set for the end of May and the debut of her hugely popular music video "Rain On Me" in which she wears many of her own makeup products, this success seems guaranteed to have some staying power.

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?

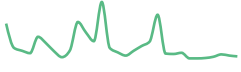






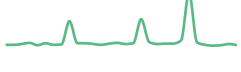


What cruelty-free eyeshadow do they want?

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: Color Cosmetics

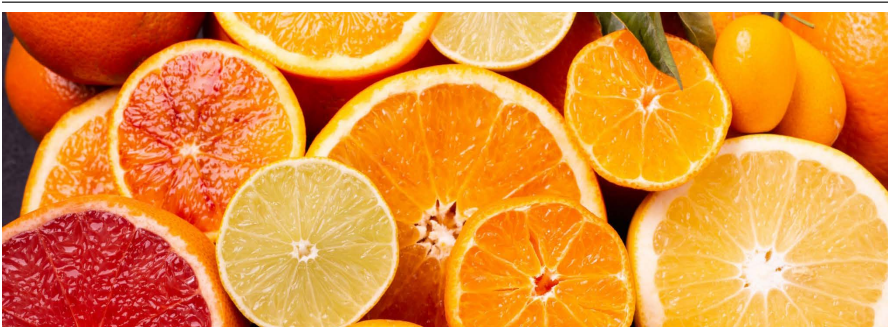
<u>Top 10 Brands</u>		<u>POPI</u>	
ColourPop Cosmetics		8.42%	-
Fenty Beauty by Rihanna		4.86%	↑ 3
Morphe		3.95%	↑ 3
Benefit Cosmetics		3.43%	↓ 1
Too Faced		3.37%	↑ 7
Kylie Cosmetics		2.83%	↑ 3
Pat McGrath Labs		2.54%	↑ 11
Urban Decay		2.45%	0
Jeffree Star Cosmetics		2.43%	↓ 2
Charlotte Tilbury		2.38%	-



Pat McGrath called on a few friends in April to help her eponymous brand, Pat McGrath Labs, make a huge digital splash. The makeup artist teamed up with stars like Aina, Naomi Campbell and Sondjra Deluxe to do a series of well-watched Instagram Lives. The social media conversation generated by those online collaborations helped her label jump 11 spots up the Top Brands List to come in at #7, and her Skin Fetish: Sublime Perfection Foundation came in #4 in the Top Face Product list despite the category trending away from foundations in general. The brand's huge sale in April didn't hurt either.








As FaceTime and Zoom calls replace in-person hangouts and work meetings for the foreseeable future, high-impact color cosmetics have never been more necessary in order to stand out on-screen. In April, products like bronzer, bold blush, and shimmery eyeshadow generated the most demand across categories guaranteeing customers won't fade into the background at their friend's next digital birthday party.



With a pandemic going on, customers are understandably concerned about their health and searching for any and all products that can help boost their immune system, even when it comes to their makeup. Items that featured antioxidants and beneficial ingredients, like Rice bran oil, Vitamin C, and Vitamin E, were especially high in demand.

Top Rankings: Cheek

<u>Top 5 Brands</u>		<u>POPI</u>	
Fenty Beauty by Rihanna		18.78%	↑1
ColourPop Cosmetics		10.62%	↓1
Charlotte Tilbury		6.47%	↑2
Benefit Cosmetics		5.32%	↓1
Iconic London		5.23%	↑1

Top 5 Products



#1
Cheeks Out Freestyle Cream Blush
Fenty Beauty by Rihanna



#2
Pressed Powder Blush
ColourPop Cosmetics



#3
Cheeks Out Freestyle Cream Bronzer
Fenty Beauty by Rihanna



#4
Born This Way Turn Up The Light Highlighting Palette
Too Faced



#5
Wanderlust Primer-Infused Blush
Buxom

Top 5 Benefits

Long-wearing
Highlighting
Sculpting/Contouring
Hydrating/Moisturizing
Brightening

POPI

16.07%
12.01%
11.93%
6.75%
5.40%

Top 5 Claims

Cruelty-free
Vegan
Paraben-free
Sulfate-free
Phthalates-free

POPI

23.19%
15.04%
14.83%
12.08%
8.94%

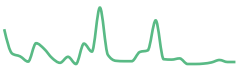


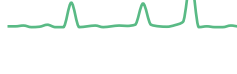

Top 5 Ingredients

Zinc
Glycerin
Hyaluronic acid
Vitamin E
Squalane

POPI

26.04%
11.05%
8.42%
6.60%
5.72%

Top Rankings: Eye

<u>Top 5 Brands</u>		<u>POPI</u>	
ColourPop Cosmetics		15.10%	-
Morphe		5.83%	↑ 2
Too Faced		3.93%	↑ 13
Urban Decay		3.75%	↑ 11
Charlotte Tilbury		2.85%	↑ 4

Top 5 Products



#1
All Things
ColourPop Cosmetics



#2
She's Got Solstice
ColourPop Cosmetics



#3
**Eye Shadow Primer
Potion**
Urban Decay



#4
Luxury Palette
Charlotte Tilbury



#5
**Better Than Sex Easy
Glide Waterproof
Liquid Eyeliner**
Too Faced

Top 5 Benefits

Long-wearing	28.39%
Budge-proof	14.85%
Volumizing	6.97%
Lengthening	6.43%
Waterproof	5.34%

POPI

Top 5 Claims

Cruelty-free	35.37%
Vegan	22.88%
Paraben-free	8.86%
Phtalates-free	5.59%
Gluten-free	5.57%

POPI





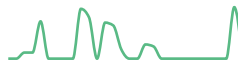
Top 5 Ingredients

Zinc	15.33%
Acacia	14.02%
Carnauba	11.46%
Rice	9.02%
Sunflower	6.96%

POPI

Top Rankings: Face

Top 5 Brands

		POPI	
Benefit Cosmetics		12.36%	↑ 7
ColourPop Cosmetics		12.03%	↑ 9
Milk Makeup		9.75%	↑ 11
Pat McGrath Labs		7.42%	↑ 21
Charlotte Tilbury		4.19%	↑ 2

Top 5 Products



#1
The POREfessional Face Primer
Benefit Cosmetics



#2
Pretty Fresh Hyaluronic Acid Tinted Moisturizer
ColourPop Cosmetics



#3
Glow Oil
Milk Makeup



#4
Skin Fetish Sublime Perfection Foundation
Pat McGrath Labs



#5
The POREfessional Hydrate Primer
Benefit Cosmetics

Top 5 Benefits

Hydrating/Moisturizing	11.75%
Long-wearing	10.69%
Smoothing	9.22%
Reduces the appearance of fine lines and wrinkles	8.62%
Priming	4.98%

POPI

11.75%
10.69%
9.22%
8.62%
4.98%

Top 5 Claims

Oil-free
Paraben-free
Cruelty-free
Vegan
Fragrance-free

POPI

13.14%
11.59%
10.28%
9.53%
7.16%

Top 5 Ingredients

Glycerin	17.31%
Hyaluronic acid	12.47%
Coconut	8.99%
Vitamin E	7.60%
Apple	7.03%

Top Rankings: Lip

Top Brands

Brand	Line Graph	POPI	Change
ColourPop Cosmetics		8.94%	-
Haus Labs		8.83%	↑ 24
Kylie Cosmetics		6.38%	↑ 2
Too Faced		4.68%	↑ 8
Jeffree Star Cosmetics		4.52%	↓ 3

Top 5 Products



#1
Lux Gloss
ColourPop Cosmetics



#2
Le Monster Matte Lip Crayon
Haus Labs



#3
Velour Liquid Lipstick
Jeffree Star Cosmetics



#4
Lip Liner
Kylie Cosmetics



#5
Lip Cheat
Charlotte Tilbury

Top 5 Benefits

Hydrating/Moisturizing	23.03%
Long-wearing	15.53%
Nourishing	9.16%
Softening	7.94%
Budge-proof	5.92%

POPI

23.03%
15.53%
9.16%
7.94%
5.92%

Top 5 Claims

Cruelty-free	21.43%
Paraben-free	19.30%
Vegan	17.29%
Sulfate-free	10.29%
Gluten-free	7.71%

POPI

21.43%
19.30%
17.29%
10.29%
7.71%

Top 5 Ingredients

Vitamin E	8.57%
Shea	8.30%
Avocado	7.08%
Jjoba	5.86%
Mango	5.33%