



**THE
CHERRY ON TOP
BEAUTY REPORT**

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February 2020, Color Cosmetics

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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 -

While commitment to those New Year's resolutions may have started to fade as mass hysteria and stockpiling enough frozen dinners for a decade begins, consumers' commitment to shaking up all their old beauty habits shows no signs of stopping just yet.

Buyers are swapping out their blush in favor of highlighter (p. 7), snapping up every face product except for foundation (p. 9), and gravitating towards all things au naturel for eyes (p. 8). But there is one constant that's stood the test of time: the immense selling-power of new Lady Gaga music (p. 10).

And for all you die-hard Cherry Pickers, we've got some exciting news. Starting this month we are making our report archive FREE. You can check out an archive of all of our past reports [here](#).

Also, you can now catch us in WWD's new Beauty Inc. newsletter for monthly Top 10's across Color Cosmetics and... Skincare!!!

With Love,
Cherry Pick

Contents/ This Month's Beauty Hot Takes

7 **Highlighter is slowly replacing blush and bronzer**

Last month, we told you buyers were looking to shine even in the dead of winter, and that trend shows no signs of stopping just yet as highlighting products begin to edge out blush and bronzer completely in the Cheek category. Highlighting was by far the benefit that generated the most consumer interest, as well as brightening, with highlighter taking three of the top five product spots. But with the launch of Fenty Beauty's new cream blush right around the corner, all of this seems poised to change overnight.

8 **Customers want long-lasting wear with all natural ingredients**

Buyers in the Eye category have made it clear they want the maximum bang for their buck without all those harsh chemical ingredients of the past. Shoppers are overwhelmingly searching for benefits like long-wearing, budge-proof and waterproof, but from brands that are also cruelty-free, vegan, and paraben-, phthalate- and sulfate-free. Top ingredients were also straight from the natural beauty counter, like zinc, beeswax, acacia, and carnauba.

9 **Customers are interested in everything but foundation**

Foundation appears to be on the way out as customers prefer investing in every other type of face-perfecting product, including concealer, powder, primer and setting spray, which took the top four out of five products in the Face category. But clearly Pat McGrath's Skin Fetish is finding a new way to entice buyers as the only foundation to make the cut, helping the brand jump 70 spots to #5 on the Top Face Brands list.

10 **Lady Gaga's new single sends interest in her makeup brand soaring**

Lady Gaga's Amazon-backed makeup brand Haus Labs has struggled to make top ten lists anywhere outside of the e-commerce company, making rather infrequent appearance on this report. But this month, the pop star proved the power of product integration, launching a lipstick pencil in coordination with her new music video and sending her brand shooting 18 spots up the chart to take the #2 slot on the Top Lip Brands list, #1 in Top Products for Lip, and jumping 25 spots to #7 in Top Color Cosmetics Brands.

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.







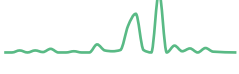



Why? It's simple. Brands don't sell content, they sell products. When consumers post a comment (showing either positive or negative sentiment), they do not generally mention the products by name. Consumers react to the content that contains the products. The positive and negative fluctuations of sentiment 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

Top 10 Brands

POPI

ColourPop Cosmetics		10.52%	-
Jeffrey Star Cosmetics		7.15%	↑ 12
Fenty Beauty		6.13%	-
Benefit Cosmetics		5.39%	↑ 4
Anastasia Beverly Hills		4.98%	↓ 3
Too Faced		4.08%	↓ 2
Haus Labs		3.48%	↑ 25
Huda Beauty		3.45%	↑ 3
Urban Decay		2.58%	↑ 13
Morphe		2.57%	↑ 3



Jeffrey Star proved the power of a little drama to drive sales in February. The YouTube beauty guru launched a new eyeshadow palette and clapped back at critics, calling out fellow vloggers Huda Katan and Michelle Grace. All that attention helped his brand jump 12 spots to take #2 on this month's top list.



ColourPop and Fenty are the brands to beat, but Huda Beauty, Urban Decay and Haus Labs prove the power of a single, well-timed release.

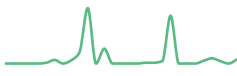
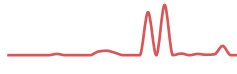





In February, ColourPop and Fenty maintained their stranglehold on the Top Color Cosmetics Brand list maintaining their positions at #1 and #3 positions thanks to a consistent rollout of new products throughout the month. But brands like Huda Beauty, Urban Decay and Haus Labs demonstrated that all it takes is one buzz-worthy debut to totally change the social media conversation. Of course, it also doesn't hurt to have one of the biggest pop stars in the world plug her new lipstick in her first single since 2018.

Top Rankings: Cheek

Top 5 Brands

POPI

Jeffree Star Cosmetics		9.91%	↑ 16
ColourPop Cosmetics		9.63%	↓ 1
Benefit Cosmetics		6.15%	↑ 3
Fenty Beauty		5.64%	↑ 20
KKW Beauty		5.03%	↓ 8

Top 5 Products



#1
Extreme Frost
Jeffree Star Cosmetics



#2
Sailor Moon Blush
ColourPop Cosmetics



#3
Forever Highlighter
KKW Beauty



#4
Blush
Kylie Cosmetics



#5
**Born This Way
Turn Up The Light
Highlighting Palette**
Too Faced

Top 5 Benefits

Highlighting	33.29%
Long-wearing	22.38%
Sculpting/Contouring	10.20%
Smoothing	5.11%
Brightening	4.85%

POPI

Top 5 Claims

Cruelty-free	21.23%
Paraben-free	17.37%
Vegan	11.36%
Sulfate-free	8.42%
Phthalates-free	8.18%

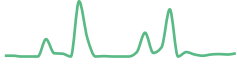


POPI

Top 5 Ingredients

Glycerin	17.65%
Zinc	12.27%
Mango	6.14%
Papaya	5.96%
Corn	5.78%

Top Rankings: Eye

Top 5 Brands

		<u>POPI</u>	
ColourPop Cosmetics		22.64%	-
Jeffree Star Cosmetics		11.34%	↑ 8
Benefit Cosmetics		7.56%	↑ 2
Anastasia Beverly Hills		5.55%	↓ 2
Huda Beauty		5.35%	↑ 5

Top 5 Products



#1
Blood Lust Palette
Jeffree Star Cosmetics



#2
Precisely, My Brow Pencil
Benefit Cosmetics



#3
Blood Sugar Palette
Jeffree Star Cosmetics



#4
Lilac You a Lot
ColourPop Cosmetics



#5
Pastels Obsessions Palette
Huda Beauty

Top 5 Benefits

Long-wearing	21.68%
Budge-proof	14.20%
Defining	9.05%
Waterproof	8.99%
Filling	6.35%

POPI

Top 5 Claims

Cruelty-free	29.89%
Vegan	18.82%
Paraben-free	9.62%
Phthalates-free	7.00%
Sulfate-free	6.77%

POPI

Top 5 Ingredients

Zinc	13.82%
Beeswax	12.12%
Mineral	9.23%
Acacia	9.14%
Carnauba	7.89%

Top Rankings: Face

Top 5 Brands

		<u>POPI</u>	
Fenty Beauty		10.11%	↑ 2
Urban Decay		8.51%	↑ 8
Too Faced		7.55%	↑ 6
Dior Makeup		5.94%	↑ 26
Pat McGrath Labs		4.84%	↑ 70

Top 5 Products



#1
**Born This Way
Concealer**
Too Faced



#2
**PRO FILT'R Hydrating
Primer**
Fenty Beauty



#3
**All Nighter Matte
Setting Spray**
Urban Decay



#4
**Born This Way Setting
Powder**
Too Faced



#5
**Skin Fetish:
Sublime Perfection
Foundation**
Pat McGrath Labs

Top 5 Benefits

Long-wearing	13.75%
Hydrating/Moisturizing	10.11%
Concealing	6.96%
Budge-proof	6.24%
Smoothing	5.57%

POPI

Top 5 Claims

Cruelty-free
Paraben-free
Oil-free
Phthalates-free
Vegan

POPI



14.29%
11.09%
8.92%
8.58%
8.56%

Top 5 Ingredients

Glycerin	18.86%
Coconut	8.50%
Hyaluronic acid	7.03%
Grape	5.98%
Ceramides	3.38%

Top Rankings: Lip

Top Brands

		POPI	
ColourPop Cosmetics		13.48%	↑ 2
Hauslabs		11.30%	↑ 18
Jeffree Star Cosmetics		7.79%	↑ 4
Fenty Beauty		6.24%	↑ 21
Kylie Cosmetics		5.65%	↓ 4

Top 5 Products



Le Monster Matte Lip Crayon
Haus Labs



The Gloss
Jeffree Star Cosmetics



Velour Liquid Lipstick
Jeffree Star Cosmetics



Ultra Blotted Lip
ColourPop Cosmetics



High Gloss
Kylie Cosmetics

Top 5 Benefits

Long-wearing	20.75%
Hydrating/Moisturizing	19.87%
Nourishing	8.47%
Budge-proof	7.73%
Conditioning	6.06%

POPI

Top 5 Claims

Cruelty-free	26.38%
Vegan	21.03%
Paraben-free	18.23%
Gluten-free	7.71%
Phthalates-free	7.25%

POPI

Top 5 Ingredients

Shea	9.44%
Coconut	7.39%
Jjoba	7.33%
Beeswax	6.20%
Vitamin E	6.18%