



**THE
CHERRY ON TOP
BEAUTY REPORT**
JANUARY 2020

THE CHERRY ON TOP BEAUTY REPORT

January 2020, Color Cosmetics

CEO

Justin Stewart
justin@cherrypickai.com

COO

Melissa Munnerlyn
melissa@cherrypickai.com

Head of Growth

Gio 'Tony' Chiappetta
gio@cherrypickai.com

Contributing Writers

Emily Kirkpatrick



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 -

New year, new Cherry Pick. As we enter 2020, it's hard not to feel the allure of reinvention and starting fresh. Here, we're kicking off the decade with a whole new look for our monthly report.

And in January, customers made it clear they're also ready to make some big aesthetic changes and turn the page on many of the major beauty trends of years past.

While 2019 was all about experimenting with every color of the rainbow, this year it seems to be all about neutral, smoky eyeshadow palettes (p. 8). Likewise, a range of skin tone shades dominated the lip category, particularly those made by the queens of nudes, Kim Kardashian and Kylie Jenner (p. 10). And when it comes to foundation, buyers are going back to basics, relying on tried-and-true favorites from brands like Nars and Laura Mercier (p. 9).

With Love,
Cherry Pick

Contents/ This Month's Beauty Hot Takes

7 Buyers want to shine even in the dead of winter

While the days may be short and most of the time the sun barely even makes an appearance, customers are looking to amp up their glow by splurging on highlighters and bronzer ahead of summer. Those items took four of the top five product spots in the Cheek category, aided by high volume of desire for benefits like highlighting, contouring, and brightening.

8 Neutral palettes beat out the rainbow bright shades of 2019

While 2019 was all about huge technicolor palettes featuring every color of the rainbow, 2020 is off to a much starker start. Gone are the neon-bright shades of yesteryear, and in their place, neutral palettes like KKW Beauty's Night Sky and Sepia Sunset palettes and Too Faced's Pretty Rich palette have taken over. Proof customers want to kick off the new millennium with something a little more subtle.

9 Customers go for the classics when it comes to their face

NARS demonstrated that tried and true classics have real staying power, taking the number one spot on both the Top 5 Brand and Products list in the Face category thanks to the huge popularity of their beloved Radiant Creamy Concealer. Laura Mercier also proved this point, jumping 8 spots to #2 on the Top 5 Brands list and taking the second spot in the Top 5 products list with its classic Translucent Loose Setting Powder.

10 The KarJenners dominate the Lip category with an emphasis on nudes

It should be no surprise that when it comes to nudes, the Kardashian–Jenners reign supreme—nude lipsticks that is. The reality TV sisters both launched their beauty brands around a capsule collection of matte, skin tone shades and are now reaping the rewards as customers increasingly participate in the trend. KKW Beauty took the #1 Top Brand slot in the Lip category as well as placing #1 and 3 in the Top 5 products, while Kylie Cosmetics took #2 both in Top Brands and Top Products.

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.



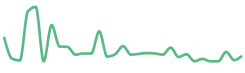
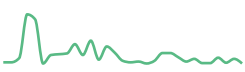
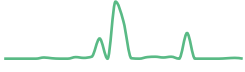





Why? It's simple. Brands don't sell content, they sell products. When consumers post a comment (showing either positive or negative sentiment), they do not generally mention the products by name. Consumers react to the content that contains the products. The positive and negative fluctuations of sentiment 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%	-
Anastasia Beverly Hills		7.15%	↑ 8
Fenty Beauty		6.13%	↑ 2
Too Faced		5.39%	↑ 12
KKW Beauty		4.98%	↑ 3
Nars		4.08%	↓ 4
Kylie Cosmetics		3.48%	-
Benefit Cosmetics		3.45%	↑ 7
NYX		2.58%	↑ 14
Laura Mercier		2.57%	↑ 28



Laura Mercier showed the buying power of a longtime loyal fan base combined with a new product launch. The classic cosmetics brand debuted a new range of primers in January helping to spike social media conversation and pushing the company up 28 spots to #10 on the list of Top Color Cosmetics Brands.



NYX took a cue from Urban Decay x Game of Thrones' book, partnering up with the return of a TV show to enormous success. The makeup brand released a new range of products pegged to the debut of the latest season of the Chilling Adventures of Sabrina, garnering coverage from a ton of media outlets and propelling NYX up 14 spots to #9 this month.


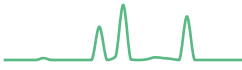
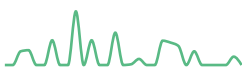




One new launch wasn't enough to keep NARS in the conversation this month. While the brand started off with a far amount of buzz around its new Afterglow Eye Palette, consumer affinity quickly dropped. As did NARS position on the Top Brand list, going from #2 last month to #6 in January, as it was passed over by brands that were able to maintain consistently high levels of excitement throughout January.

Top Rankings: Cheek

Top 5 Brands

POPI

ColourPop Cosmetics		19.24%	↑1
KKW Beauty		15.68%	↑8
Too Faced		10.12%	↑9
Kylie Cosmetics		6.08%	-
Wander Beauty		5.91%	↑20

Top 5 Products



#1
Classic Mattes Blush Palette
KKW Beauty



#2
Diamond Light Highlighter
Too Faced



#3
Shimmering Dry Oil
ColourPop Cosmetics



#4
Trip for Two Blush and Bronzer Duo
Wander Beauty



#5
Pressed Powder Bronzer
ColourPop Cosmetics

Top 5 Benefits

Highlighting
Sculpting/Contouring
Long-wearing
Hydrating/Moisturizing
Brightening

POPI

17.82%
11.30%
9.94%
7.77%
7.35%

Top 5 Claims

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

POPI

29.42%
25.94%
11.54%
10.66%
7.06%

Top 5 Ingredients

Argan Oil
Marula Oil
Vitamin E
Mango Extract
Sunflower Oil

POPI

11.06%
10.61%
8.40%
8.36%
8.18%

Top Rankings: Eye

Top 5 Brands

POPI

ColourPop Cosmetics		14.52%	↑ 3
Anastasia Beverly Hills		12.37%	↑ 3
KKW Beauty		8.91%	↓ 1
Fenty Beauty		6.73%	↑ 6
Benefit Cosmetics		5.57%	↑ 15

Top 5 Products



#1
Amrezy Palette
Anastasia Beverly Hills



#2
Night Sky Eyeshadow Palette
KKW Beauty



#3
Precisely, My Brow Pencil
Benefit Cosmetics



#4
Sepia Sunset Eyeshadow Palette
KKW Beauty



#5
Pretty Rich
Too Faced

Top 5 Benefits

Long-wearing	20.78%
Budge-proof	14.46%
Waterproof	9.31%
Defining	8.45%
Volumizing	7.20%

POPI

Top 5 Claims

Cruelty-free	27.07%
Vegan	14.56%
Paraben-free	12.92%
Gluten-free	8.31%
Phthalates-free	5.74%

POPI

Top 5 Ingredients

Beeswax	13.04%
Vitamin E	9.52%
Rice	9.38%
Castor Oil	9.14%
Mineral Oil	7.70%

Top Rankings: Face

Top 5 Brands

Brand	Line Graph	POPI	Change
NARS		12.91%	↑ 2
Laura Mercier		5.89%	↑ 8
Fenty Beauty		5.29%	↓ 2
Make Up For Ever		5.22%	↓ 3
NYX		4.58%	↑ 11

Top 5 Products



#1
Radiant Creamy Concealer
Nars



#2
Translucent Loose Setting Powder
Laura Mercier



#3
Pro Filt'r Hydrating Longwear Foundation
Fenty Beauty



#4
Ultra HD Foundation Fluid Foundation
Make Up For Ever



#5
Under Cover Concealer
Pretty Vulgar

Top 5 Benefits

Benefit	POPI
Long-wearing	13.83%
Hydrating/Moisturizing	9.70%
Concealing	8.78%
Budge-proof	7.01%
Sculpting/Contouring	5.43%

Top 5 Claims

Claim	POPI
Vegan	7.37%
Paraben-free	7.18%
Cruelty-free	6.74%
Gluten-free	5.75%
Phthalates-free	4.77%

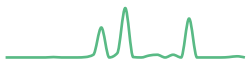




POPI

Top 5 Ingredients

Ingredient	POPI
Glycerin	20.39%
Grape	6.46%
Hyaluronic acid	4.61%
Sunflower	4.55%
Coconut	4.13%

Top Rankings: Lip

Top Brands

		<u>POPI</u>	
KKW Beauty		13.84%	↑ 1
Kylie Cosmetics		8.48%	↑ 1
ColourPop Cosmetics		5.82%	↓ 2
Huda Beauty		3.65%	↑ 8
Maybelline		3.39%	↑ 2

Top 5 Products



Lip Crayon
KKW Beauty



Lip Liner
Kylie Cosmetics



Matte Lipstick
KKW Beauty



Lippie Pencil
ColourPop Cosmetics



Plush Pout Gloss
Artist Couture

Top 5 Benefits

Long-wearing	26.86%
Hydrating/Moisturizing	21.62%
Budge-proof	7.58%
Nourishing	6.85%
Waterproof	4.19%

POPI

Top 5 Claims

Cruelty-free	24.27%
Vegan	18.23%
Paraben-free	16.29%
Phthalates-free	7.54%
Gluten-free	7.16%

POPI

Top 5 Ingredients

Beeswax	7.49%
Joboba	6.80%
Shea	6.44%
Coconut	5.95%
Castor	4.63%

POPI