



**THE
CHERRY ON TOP
BEAUTY REPORT**

MARCH 2020

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March 2020, Color Cosmetics

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IMAGE (ABOVE) BY RETHA FERGUSON. COVER IMAGE BY EZEKIXL AKINNEWU.

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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—

As the pandemic alters all of our daily lives forcing us to adapt, the cosmetics industry is also having to quickly adjust to this strange new reality where makeup has suddenly become relegated to Zoom meetings and parties that take place over FaceTime.

So it's hardly a surprise that March saw a 23% month-over-month decline in demand for Color Cosmetics while skincare jumped up 10%. As customers began to quarantine in mid-March, their interest also started to pivot to self-care leading to face masks taking 4 of the top 10 product spots.

But while cosmetic sales may be down overall, Huda Kattan's brand shows no signs of slowing down (p. 6), ColourPop partnered up with the new live action Mulan movie to major success (pg. 6 and 10), and while the Fenty Beauty TikTok House never had a chance to take off, the news still sent their highlighter sales soaring (p. 9).

Until we can all see each other again face-to-face, from the Cherry Pick family to yours: Stay well, stay safe, and stay inside.

With Love,
Cherry Pick

Contents/ This Month's Beauty Hot Takes

7 **Fenty Beauty is becoming the go-to brand for highlighter with a little help from TikTok**

Last month, highlighter was slowly pushing bronzer and blush out of the Cheek category and, this month, Fenty Beauty made it clear they're the brand who will be providing it. The cosmetics company's Diamond Bomb came in #2 on the Top Products list for Cheek and its Match Stix Shimmer Skinstick came in #4. The brand's dominance of the category was aided in part by the announcement of the Fenty Beauty House catering to its network of TikTok creators.

8 **Huda Beauty proves the power of pastels**

While launching a collection of pastel eyeshadow palettes for spring may not seem like anything groundbreaking, Huda Beauty demonstrated that the customer demand for these shades is still through the roof. The palettes took the #1 product spot in the Eye category and helped the brand jump three spots to #2 on the Top Brand list for the category as well.

9 **Face: Urban Decay and Dior Makeup are picking up steam**

Urban Decay and Dior Makeup on the Top Brands list in Face are continuing their march up the list to take the #1 and #2 spots respectively. Urban Decay's All Nighter Setting Spray landed #1 on the Top 5 Products list for the category while the DiorSkin Forever UnderCover Concealer made its first appearance at #2.

10 **Lip: ColourPop x Mulan combines customers' love for lip gloss and collaborations**

The January report already demonstrated that lip gloss was on the rise while lipstick was on its way out in 2020, and ColourPop doubled down on that trend in its collaboration with Disney's Mulan via the launch of the brand's Lux Gloss. The product came in #1 on the Top Products list and helped the cosmetics company maintain its spot at #1 on the Top Brands list in Lip for the second month in a row.

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		16.63%	-
Huda Beauty		4.49%	↑ 6
Benefit Cosmetics		3.98%	↑ 1
Anastasia Beverly Hills		3.83%	↑ 1
Fenty Beauty		3.78%	↓ 2
Morphe		3.26%	↑ 4
Jeffree Star Cosmetics		2.86%	↓ 5
Urban Decay		2.32%	↑ 1
Kylie Cosmetics		2.31%	↑ 2
Charlotte Tilbury		2.11%	↑ 4



Although the release of Disney's live action remake of *Mulan* was pushed back until July, fans are consoling themselves this month by buying up all of the ColourPop beauty products made in collaboration with the film. According to a press release from the brand, *Mulan* was the number one requested Disney collaboration and the product's almost instantly sold out status drives that point home, helping ColourPop maintain its #1 position on March's Top Brands list.



Charlotte Tilbury returns to the Top Brands list this month at #10, moving up four spots, by introducing a range of lipsticks targeted specifically for weddings. The makeup artist is already a favorite amongst major celebrities, so it makes sense brides-to-be would also want to give themselves a taste of that A-list treatment on their big day.



Color cosmetics sales were dramatically down in March, but you wouldn't know it looking at Huda Beauty's movement up the charts. The brand took the #2 spot on the Top Brands list, moving up 6 places thanks to two eyeshadow palette releases—*Pastel Obsessions* and *Mercury Retrograde*, the latter of which sold out in one second. It also helps that she introduced her brand to a whole new market this month, launching her products on Tmall Global, China's biggest cross-border e-commerce platform.

Top Rankings: Cheek

Top 5 Brands

		<u>POPI</u>	
ColourPop Cosmetics		14.49%	↑ 1
Fenty Beauty		12.00%	↑ 2
Benefit Cosmetics		6.68%	-
Anastasia Beverly Hills		5.69%	↑ 6
Charlotte Tilbury		3.07%	↑ 4

Top 5 Products



#1
Pressed Powder Blush
ColourPop Cosmetics



#2
Diamond Bomb
Fenty Beauty by Rihanna



#3
hoola matte bronzer
Benefit Cosmetics



#4
Match Stix Shimmer Skinstick
Fenty Beauty by Rihanna



#5
Nicole Guerriero Glow Kit
Anastasia Beverly Hills

Top 5 Benefits

Sculpting/Contouring	9.57%
Brightening	2.96%
Smoothing	2.64%
Budge-proof	2.53%
Pore reducing/minimizing	2.46%

POPI

9.57%
2.96%
2.64%
2.53%
2.46%

Top 5 Claims

Cruelty-free	25.52%
Vegan	17.98%
Paraben-free	12.47%
Sulfate-free	9.17%
Phthalates-free	6.25%

POPI

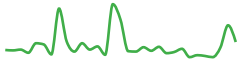




25.52%
17.98%
12.47%
9.17%
6.25%

Top 5 Ingredients

Zinc	18.22%
Glycerin	14.60%
Squalane	6.32%
Glycolic Acid	5.27%
Mango	4.01%

Top Rankings: Eye

Top 5 Brands

		<u>POPI</u>	
ColourPop Cosmetics		9.37%	-
Huda Beauty		6.65%	↑ 3
Benefit Cosmetics		5.58%	-
Morphe		5.50%	↑ 3
Anastasia Beverly Hills		5.01%	↓ 1

Top 5 Products



#1
**Pastel Obsessions
Eyeshadow Palette**
Huda Beauty



#2
**The James Charles
Palette**
Morphe



#3
**Brow Styler Eyebrow
Pencil & Powder Duo**
Benefit Cosmetics



#4
Luxury Palette
Charlotte Tilbury



#5
**Hello, Charmer!
Palette**
Boxycharm

Top 5 Benefits

Long-wearing	27.58%
Budge-proof	14.61%
Waterproof	9.27%
Defining	8.19%
Volumizing	6.52%

POPI

Top 5 Claims

Cruelty-free	31.97%
Vegan	18.98%
Paraben-free	9.84%
Sulfate-free	7.06%
Phthalates-free	6.21%

POPI






Top 5 Ingredients

Castor	9.88%
Carnauba	9.27%
Beeswax	8.42%
Acacia	7.89%
Vitamin E	6.84%

Top Rankings: Face

Top 5 Brands

POPI

Urban Decay		7.19%	↑ 3
Dior Makeup		5.60%	↓ 2
Too Faced		3.84%	-
Fenty Beauty		3.70%	↓ 3
Tarte		3.62%	↑ 6

Top 5 Products



#1
All Nighter Long Lasting Makeup Setting Spray
Urban Decay



#2
DiorSkin Forever UnderCover Concealer
Dior Makeup



#3
Shape Tape Contour Concealer
Tarte



#4
Loose Setting Powder
Anastasia Beverly Hills



#5
Airbrush Flawless Foundation
Charlotte Tilbury

Top 5 Benefits

POPI

Long-wearing	13.03%
Hydrating/Moisturizing	11.06%
Concealing	7.75%
Smoothing	7.45%
Budge-proof	6.68%

13.03%
11.06%
7.75%
7.45%
6.68%

Top 5 Claims

Cruelty-free
Paraben-free
Vegan
Oil-free
Sulfate-free

POPI

13.55%
11.90%
11.73%
8.87%
6.90%

Top 5 Ingredients

Glycerin
Coconut
Vitamin E
Hyaluronic acid
Shea






POPI

13.19%
5.16%
4.12%
4.05%
3.71%

Top Rankings: Lip

Top Brands

POPI

ColourPop Cosmetics		9.73%	-
Jeffree Star Cosmetics		4.96%	↑ 1
Fenty Beauty		4.58%	↑ 1
Yves Saint Laurent		4.43%	↑ 59
Kylie Cosmetics		3.71%	-

Top 5 Products



#1
Lux Gloss
ColourPop Cosmetics



#2
Gloss Bomb
Fenty Beauty by Rihanna



#3
Velour Liquid Lipstick
Jeffree Star Cosmetics



#4
**Rouge Volupte Shine
Oil-in-Stick**
Yves Saint Laurent



#5
High Gloss
Kylie Cosmetics

Top 5 Benefits

Hydrating/Moisturizing
Long-wearing
Nourishing
Softening
Smoothing

POPI

19.33%
17.09%
13.28%
9.31%
5.39%

Top 5 Claims

Cruelty-free
Vegan
Paraben-free
Antioxidant
Gluten-free

POPI

25.12%
20.25%
15.95%
7.65%
7.62%

Top 5 Ingredients

Shea
Jojoba
Peptides
Pomegranate
Vitamin E

POPI

11.35%
8.65%
6.65%
5.21%
5.20%