



**THE
CHERRY ON TOP
BEAUTY REPORT**

MAY 2020

THE CHERRY ON TOP BEAUTY REPORT

May 2020, Skincare

CEO

Justin Stewart
justin@cherrypickai.com

COO

Melissa Munnerlyn
melissa@cherrypickai.com

Contributing Writers

Emily Kirkpatrick



COVER PHOTO BY LUKE JONES. IMAGE ABOVE BY CDC.

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: Customers want cleansers that pack an extra punch**

Shoppers want a face wash that will take off their makeup while providing a skin-enhancing benefit, looking for products that also hydrate, nourish, soften, and calm. This can also be seen amongst the Top Product list for the category where cleansers that promise to provide antioxidants and pore cleaning enzymes rank amongst those most sought after.

8 **Toner: Buyers look for toners that brighten their complexion**

Like the top products in the cleanser category, it's not enough for a toner to simply balance skin and close pores. Customers are looking for products that multitask, particularly those that will also give them brighter, glowy skin with formulations that include ingredients like Vitamin C as well as polyhydroxy, beta-hydroxy, glycolic and lactic acids.

9 **Treatments: Shoppers look to enhance their routines with all-new treatments**

Out with the old! When it comes to treatments, buyers aren't afraid to ditch tried and true products. Shoppers are into tweaking their routines for maximum results, seeking out the latest releases from brands they might not typically use. Of the Top 5 Products in the category this month, the top four were released within the last three months and each focus on very different skin issues.

10 **Moisturizer: ColourPop's sister brand finds success with moisturizer**

While ColourPop has dominated the cosmetics market across every category for months, its sister skincare brand Fourth Ray Beauty hasn't found quite as solid footing just yet. But one place the label has made inroads is in the Moisturizer category, taking the number one spot for both Brands and Products with its Mulan Jasmine Face Milk. Once again demonstrating ColourPop's proven method for success of launching products in tandem with a major cultural moment.

11 **Mask: Quench thirsty skin this summer with super hydrating masks**

As temperatures heat up, the effects of dehydration, especially when it comes to parched skin, are all the more apparent. That's why buyers are seeking out hydrating formulations across all categories, but especially when it comes to masks which maximize the opportunity for those skin-quenching ingredients to really sink in.

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.

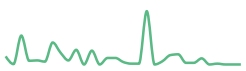









Why? It's simple. Brands don't sell content, they sell products. When consumers post a comment (showing either positive or negative sentiment), they do not generally mention the products by name. Consumers react to the content that contains the products. The positive and negative fluctuations of sentiment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

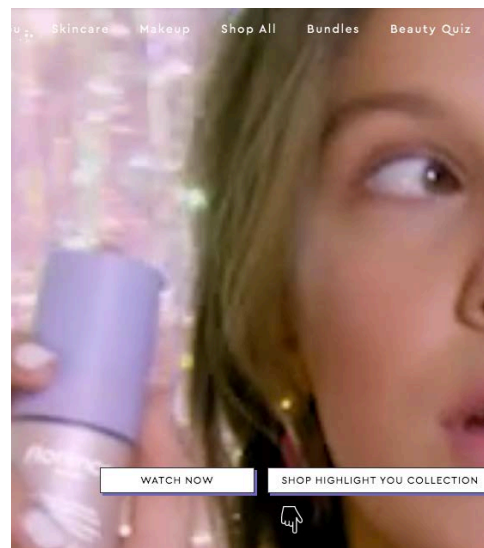
At Cherry Pick, we believe the new marketers in beauty are the consumers themselves. Likes, impressions, sentiment, and sales data alone do not tell the entire picture of which products the consumer wants and how to possibly impact their actions. By listening to them in a new way, we provide a deeper analysis of how they feel and think beyond what anyone else offers.

Top Brands: Skincare

Top 10 Brands

POPI

Huda Beauty		5.29%	↑ 3
Pixi		4.47%	↑ 4
OleHenriksen		3.70%	↑ 7
GlamGlow		3.59%	-
Fourth Ray Beauty		3.54%	↓ 4
Tarte		3.39%	↑ 30
Charlotte Tilbury		3.24%	↓ 5
Florence by Mills		3.23%	↑ 33
Kylie Skin		2.80%	-
Farsali		2.12%	↑ 3



Florence by Mills finds major success in skincare

Millie Bobby Brown's fledgling brand Florence by Mills has struggled to find its footing in the world of cosmetics, but its skincare offerings are another story. The brand jumped 33 spots to number 8 on the Top Brands list this month, ranking just above fellow celeb line, Kylie Skin. It's also finding fans thanks to its Dreamy Dew Moisturizer which came in number 3 on the Top Products list in the Moisturizer category.



LOGO:

Leaping Bunny

ORGANISATION:

CCIC & BUAV (Cruelty-Free International)

LOCATION:

International



LOGO:

Caring Consumer

ORGANISATION:

PETA

LOCATION:

USA-based



LOGO:

CCF Rabbit

ORGANISATION:

Choose cruelty-Free

LOCATION:

Australia-based






Paraben, sulfate, and cruelty-free are a must when it comes to skincare

Across all categories, customers are making their health and eco-conscious preferences clear, overwhelmingly looking for products without parabens, a preservative that is believed to disrupt hormone function and also harm marine life. People are also searching for cruelty-free, sulfate-free, phthalates-free and vegan products, proving the activism we've seen on the streets extends to skincare as well.

Top Rankings: Cleanser

Top 5 Brands

POPI

Tarte		15.98%	↑ 9
Elemis		9.43%	↓ 1
Josie Maran		5.56%	↑ 51
GlamGlow		4.75%	-
Pixie		4.41%	↓ 1

Top 5 Products



#1
Tarte
Micellar Magic Makeup Remover & Cleanser



#2
Josie Maran
Pineapple Enzyme Pore Clearing Cleanser



#3
GlamGlow
Gentlebubble™



#4
Kylie Skin
Foaming Face Wash



#5
Youth To The People
Superfood Antioxidant Cleanser

Top 5 Benefits

Removes Makeup
Hydrating
Nourishing
Softening
Calming

POPI

14.32%
12.24%
9.80%
9.12%
8.64%

Top 5 Claims

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

POPI

11.26%
11.23%
11.16%
10.43%
9.98%

Top 5 Ingredients

Green tea
Glycerin
Coconut
Mulberry
Vitamin E

POPI

12.98%
10.10%
9.09%
8.40%
7.99%

Top Rankings: Toner

Top 5 Brands

		POPI	
Glow Recipe		9.60%	↑ 5
Saturday Skin		2.74%	↑ 7
Fresh		2.65%	-
Ren Clean Skincare		2.42%	↑ 26
Beautycounter		2.42%	-

Top 5 Products



#1
Kylie Skin
Vanilla Milk Toner



#2
Pixi
Glow Tonic



#3
OleHenriksen
Glow2OH Dark Spot
Toner



#4
Glow Recipe
Watermelon Glow PHA
+BHA Pore-Tight Toner



#5
Pixi
Vitamin-C Tonic

Top 5 Benefits

	POPI
Soothing/calming	14.87%
Hydrating/moisturizing	12.39%
Brightening	8.93%
Smoothing	8.56%
Softening	7.96%

Top 5 Claims

	POPI
Paraben-free	15.88%
Cruelty-free	15.22%
Alcohol-free	11.49%
Sulfate-free	10.40%
Antioxidant	7.33%

Top 5 Ingredients

	POPI
Glycolic Acid	9.83%
Jojoba	9.10%
Aloe	8.36%
Squalane	7.87%
Lemon	7.85%

Top Rankings: Treatments

Top 5 Brands

POPI

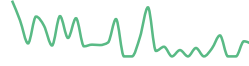
OleHenriksen



10.89%

↑7

Farsali



7.79%

↑2

Paula's Choice



4.75%

↑9

Fresh



4.75%

↑5

Charlotte Tilbury



4.45%

↓2

Top 5 Products



#1
OleHenriksen
Banana Bright Vitamin C Serum



#2
Charlotte Tilbury
Charlotte's Magic Serum Crystal Elixir



#3
Fresh
Rose Deep Hydration Oil-Infused Serum



#4
Dermatologica
Redness Relief Essence



#5
PureHeals
Centella 90 Ampoule

Top 5 Benefits

POPI

Hydrating/Moisturizing
Skin balancing/evens skin tone
Reduces the appearance of lines and wrinkles
Soothing/calming
Brightening

14.57%
10.21%
9.30%
8.86%
8.81%

Top 5 Claims

Paraben-free
Cruelty-free
Antioxidant
Vegan
Sulfate-free

POPI

13.18%
11.95%
9.50%
9.37%
8.52%

Top 5 Ingredients

Glycerin
Vitamin C
Vitamin E
Orange
Aloe

POPI

12.74%
10.94%
7.62%
6.73%
5.76%

Top Rankings: Moisturizer

Top Brands

POPI

Fourth Ray Beauty		8.07%	-
Pixi		8.01%	↑ 6
Charlotte Tilbury		4.56%	↑ 2
E.L.F.		3.82%	↑ 47
Florence by Mills		3.69%	-

Top 5 Products



#1
Fourth Ray Beauty
Mulan Jasmine Face
Milk



#2
Charlotte Tilbury
Charlotte's Magic Cream



#3
Florence by Mills
Dreamy Dew Moisturizer



#4
Dermologica
Barrier Repair



#5
Kate Somerville
Goat Milk Moisturizing
Cream

Top 5 Benefits

POPI

Hydrating/Moisturizing	16.81%
Smoothing	8.67%
Softening	8.64%
Soothing/calming	8.35%
Rejuvenating	7.46%

Top 5 Claims

Paraben-free
Cruelty-free
Sulfate-free
Pthalates-free
Vegan

POPI

13.33%
13.20%
10.57%
10.08%
8.16%






Top 5 Ingredients

Glycerin	12.10%
Vitamin E	9.15%
Sunflower	8.42%
Hyaluronic Acid	6.95%
Vitamin C	6.62%

Top Rankings: Mask

Top Brands

POPI

GlamGlow		13.90%	-
Florence by Mills		6.89%	↑ 11
Milk Makeup		5.43%	-
Kylie Skin		5.05%	↑ 6
Fourth Ray Beauty		4.91%	↑ 4

Top 5 Products



#1
GlamGlow
Berry Glow



#2
Milk Makeup
Watermelon Brightening
Face Mask



#3
Florence by Mills
Mind Glowing Peel Off
Mask



#4
Fourth Ray Beauty
A-HA Moment



#5
OleHenriksen
Cold Plunge Pore Mask

Top 5 Benefits

Hydrating/Moisturizing
Soothing/calming
Reduces the appearance
of lines and wrinkles
Evens Texture
Rejuvenating

POPI

13.84%
11.82%
8.21%
8.13%
7.55%

Top 5 Claims

Paraben-free
Sulfate-free
Phthalates-free
Cruelty-free
Gluten-free

POPI

13.90%
12.87%
12.61%
7.94%
7.29%

Top 5 Ingredients

Glycerin
Hyaluronic Acid
Shea
Jojoba
Superfood

POPI

9.19%
8.99%
8.71%
6.78%
6.70%