Using social data to chart the trends and category shifts that matter most

DEC - MAR 2020
The Highlights

In the second edition of Crowd Tracks – our social data series highlighting trends at the intersection of brands and culture – we look back at the last four months in the world of beauty. Analysing social media data means we can take the pulse of consumer sentiment across an entire category, uncovering conversation at scale and what it all means for brands. We call this method Culture At Scale and use it to make sense of fast-paced categories – like beauty.

First up, we highlight the new-found acceptance of beauty chat among female politicians in the US. We also look at how the appetite for halal and vegan cosmetics in South East Asia has led to the birth of innovative new brands in the region. Elsewhere, Fenty’s dominance on social continues and is well worth a mention, as well as a Dior’s attempt to be culturally relevant by partnering with K-pop sensation, Jisoo.

Under the trends spotlight we chart the rise of DIY dermatologists as powerful, self-educated consumers get scientific about product ingredients. We also explore the impact of the digital world on real life beauty standards, from AR filters to ‘Instagram Face’.

As ever, innovation in the beauty industry is rapid and vast. By turning to social data, we can spot the next big thing via patterns in global consumer behaviour online. If you have any questions about what might be next, the contents of this report, or to discuss our Culture At Scale offering, please get in touch.
**Viral Stories**

**The Top News Stories Shared on Social**

**US**

**Adornment Was the Biggest Makeup Trend at NYFW**

For the first time ever, all five of the most prominent titles for Miss World were won by black women. Jamaica’s Toni-Ann Singh (pictured) was named Miss World in the latest competition, while Zozibini Tunzi of South Africa was named Miss Universe.

Beauty adornments were one of the standout trends at this year’s New York Fashion Week. Minimal hair and makeup were accompanied by ‘crystal-embellished eyebrows’ and ‘trinket-studded’ faces to provide the creative flair.

#nyfw2020

**US**

For female candidates running for office in the US, talking about beauty has long been a taboo. However, leaning on Cosmopolitan’s popular skincare question at the end of their interviews, female politicians ranging from Elizabeth Warren to Alexandria Ocasio-Cortez are now freely traversing beauty and economic policy to great effect. #skincareroutine

**UK**

A viral news story from the Independent looked at the rise in Instagram cosmetic ‘dolls’; influencers who undertake and document their own cosmetic procedures to help others considering plastic surgery. #Tweakments

**JAMAICA**

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**FRANCE**

French exports of cosmetics and personal care products grew 9% in 2019. While the domestic market recedes (-1.2% in 2019), international exports to China grew by 48%, South Korea by 26% and Singapore by 16% in 2019. #MadeInFrance

**INDIA**

In smog-covered Delhi, Indian beauty consumers are seeking ways to protect their skin from damaging pollution particles. Recommendations range from using specialist cleansers and toners, to regular deep-cleansing masks designed to unclog dirty pores. #Beautytips

**JAPAN**

Japanese gel nails are predicted to become the next big thing in Australia according to Elle magazine, thanks to their versatility. Paola Ponce, a licensed Japanese nail instructor, says ‘these can be used not only for one-colour application but also for new types of nail art due to their high pigment contents.’ #gelnails

**AUSTRALIA**

Japanese cosmetics firm Race Corporation has launched a new vegan and halal friendly cosmetics brand. Inspired by traditional Japanese vegetarian cuisine Shojin Ryori, the brand is targeting the growing consumer demand for halal beauty in SEA.
The brands that drove the most conversation & why

**The Brand Leaderboard**

1. **Fenty Beauty**
   - 220k mentions
   - 208k authors

2. **MAC**
   - 125k mentions
   - 79k authors

3. **Dior**
   - 101k mentions
   - 69k authors

4. **Yves Saint Laurent**
   - 82k mentions
   - 72k authors

5. **Chanel**
   - 72k mentions
   - 45k authors

**Fenty**

Rihanna’s Fenty range continues to go from strength to strength and grow its devout following both on and offline. Having turned over $500m in 2018, a recent report from Forbes predicted Fenty sales to surpass $200 billion by 2025. Conversation and hype on social is widespread, largely thanks to the diversity of consumers that the brand speaks to. Fenty works hard to support women from all ethnicities through its product ranges and messaging with a focus on black heritage and authenticity.

**So?**
If you want a diverse consumer base you need diverse products. Showing an appreciation for every skin tone and ethnic background is now must have for any brand looking to find mainstream success.

**MAC**

MAC is undisputedly a household name, and this is reflected by their huge volume of conversation online. While most of the social mentions come from the US (34%), significant conversation also comes from Thailand (15%) and South Korea (6%), proving their cross-cultural appeal. MAC also has a near-meme-like status online. Interestingly, this is mainly among an older audience, as one Tweet that was reshared 5,600 times reads: “It’s so weird to me that the new gen of makeup wearers will never understand the excitement of buying your first MAC product […] I still have the very first lipstick I ever bought.”

**So?**
Nostalgia can be a powerful tool in beauty. Heritage brands can leverage this to enhance brand loyalty with audiences who have grown up with the brand.

**Dior**

Dior: Dior drove a lot of engagement in East Asia over the last few months as they announced that Jisoo, the lead singer of K-Pop band Blackpink, was to be their official ambassador in Korea following an intense period of fan speculation. She featured on the front cover of Korea’s Harper’s Bazaar in January 2020 as a result. Dior have harnessed a huge online presence in Asian markets - particularly among Gen Z - thanks to their collaborations with young cultural icons.

**So?**
Authenticity is essential when it comes to influencer marketing. Finding a cultural icon that truly resonates with your target audience will make all the difference.
Most Influential

INSTAGRAM INFLUENCERS TAKING THE SPOTLIGHT

Within the wider beauty world, influencers are finding new ways to be original and keep their followers engaged. At the top of the list is Mimi Choi, an artist who creates surrealist and mesmerising face art using makeup. Looking at the list more generally, we can see the dominance of Asian influencers, including Anthia.mo and _reiikoyuii perpetuating traditional beauty standards in interesting ways. Finally, the rise of virtual beauty influencers continues with the likes of Vogue-made model Noonoo, providing another route in for lovers of the fashion brand in Asia.

SO?

Competition is fierce on Instagram, with brands and influencers (both real and virtual) on a level playing field. In order to carve a niche and remain relevant on the platform, brands need to retain a clear and unique vision.

Most Influential Beauty Instagram Accounts (Oct 2019 - Jan 2020), by Followers

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So, how do you stand out in this increasingly crowded space?
With new beauty brands seemingly launching every week, it’s hard to imagine there’d be much room for disruption within the industry. But, last year, one Japanese brand stealthily made its way into the US market and did just that. Unframe The Beauty, also known as UZ, refers to outdated and limiting beauty ideals as ‘frames’, with all their products designed to push beyond those boundaries.

UZ launched a cloak-and-dagger campaign at New York Fashion Week that got everyone whispering (loudly) online. Models were photographed carrying envelopes stamped with ‘Confidential’, and makeup artist Diane Kendal was spotted using brandless eyeliners backstage at 3.1 Philip Lim. Social media accounts began to appear featuring the nameless eyeliner, and offering to give it away for free in exchange for an answer of whether you would KEEP or DROP and why, helping this mysterious brand to build a database of consumer feedback before it was even known. Eventually the story of its true identity broke on Allure. It was revealed that the brand is owned by Flowfushi, a mainstream, best selling entity in Japan.

Beyond its hype/hysteria-building launch campaign in the US, UZ has continued to grow its following and cult status. It has achieved this not only through drama, but an inclusive positioning and genuinely innovative products. These include temperature-adjusting lip gloss that offers ‘self moisturisation’, and eyeliner that comes in seven shades of black. In September they opened their first, futuristic store in New York. UZ looks set to join the ranks of other ‘cult’ makeup brands like Glossier and Beauty Pie as it shakes up the way we interact with brands in this space.
Emerging Trends

1. Active Beauty
   POWERFUL EFFICACY
   Consumers are seeking out key ingredients, while brands shake off the jargon to unveil previously hidden benefits.

2. Virtual Beauty
   DIGITAL DETAILS
   Advances in AI technology and social media sharing has led to new AR effects that present the face as a canvas for experimentation.
Active Beauty

Power has been put into the hands of consumers as more people seek total transparency over what ingredients are in the products they use. Whether using chemical or natural beauty, it’s all about powerful efficacy: beauty products that are easily understood, but can also drive results. Consequently, scientific understanding and appreciation is becoming more widespread. Beauty influencers are standing up for science, and brands such as The Ordinary are focusing on ‘advanced, functional beauty,’ using simplistic packaging, easy to understand ingredient lists and offering open dialogue with their consumers. The internet and social media has also made the beauty industry much more accessible. Self-made beauty bloggers, vloggers and a bottomless ocean of reviews all contribute to a more informed body of opinion that people can dip into. A new breed of ‘skintellectuals’ are doing their own research, working out the difference between their hyaluronics and their salicylics.

ACTIVE BEAUTY: NEXT STEPS

With crystal clear, functional benefits becoming a must have for modern beauty consumers, building trust over time will be the most effective way to garner an emotional connection. Bombastic claims around efficacy need to be substantiated by genuine, scientific evidence.
Active Beauty

IN THE DATA

Google Searches for Serum, Hyaluronic Acid and Vitamin C, globally in the last five years

Top five markets for hyaluronic acid searches:
- Trinidad & Tobago
- Ireland
- Singapore
- UAE
- Malaysia

Top five markets for serum searches:
- Indonesia
- Malaysia
- Vietnam
- Singapore
- Denmark

Top five markets for vitamin C searches:
- Malaysia
- Philippines
- Singapore

Location specific searches (last 12 months)

LOCATION SPECIFIC SEARCHES (LAST 12 MONTHS)

Posts containing specific ingredients, Dec 01 2019 - Feb 29 2020, English, all platforms

Oils
- Rosehip
- Grapeseed
- Peppermint
- Marula
- Macadamia
- Squalane
- Sea Buckthorn

Acids
- Salicylic
- Ascorbic
- Folic
- Ferulic
- Omega-3 Fatty

Vitamins & Agents
- Vitamin C
- Vitamin E
- Niacinamide
- Glycerin
- Arbutin
- Vitamin B6
- Benzoyl

Plant based
- Aloe Vera
- Avocado
- Hemp
- Black Tea
- Gluthatione

Sources: Google Trends (pulled 14/01/20, Brandwatch data * (Influencer audience built off those with clean beauty related keywords in their author bio)

Roséhip is increasingly heralded for its multifaceted benefits. According to one Instagram post roséhip: “hydrates and moisturises skin, exfoliates [and] brightens skin, […] contains vitamin A and C [and] helps boost collagen formation”.

Salicylic acid is often mentioned in relation to its’ ability to soothe “acne-prone skin,” dissolve “dead skin” and provide “anti-inflammatory” properties.

Vitamin C is included in a broad array of beauty posts, highlighting the antioxidant effects as well as its’ skin enhancing benefits. Top associated phrases include “free radicals,” noting vitamin C’s ability to offer protection and its’ ability to tighten the skin and reduce ageing thanks to “collagen production”.

Plant based ingredients are commonplace in product reviews and descriptions. Aloe Vera is noted for calming “sensitive skin” reactions, while “avocado face masks” are popular for their cheaper, DIY methods that provide natural and effective facials.
**Active Beauty**

**WHAT ARE PEOPLE SAYING?**

Describing a #skincareroutine through the use of different products and ingredients, including an ‘avocado melt retinol eye mask’.

An influencer uses a ‘Raspberry Seed Serum’ mixed in to her moisturiser, providing a more natural hydration boost.

Describing month-long observations after experimenting with a serum from The Ordinary: ‘a potent formulation of peptides, amino acids, hyaluronic acid, probiotics etc.’

Scientific beauty-enthusiast ‘skinchemy’ shares her thoughts on more effective active ingredients as opposed to ‘kitchen ingredients’ such as coconut oil and tea tree oil.

Describing Instagram page goodsciencebeauty regularly shares facts and advice on beauty.

Beauty scientist and influencer Dr Anjali Mahto uses Instagram to inform her followers on the science behind beauty products and the things they need to watch out for.

Creating a #skincareroutine through the use of different products and ingredients, including an ‘avocado melt retinol eye mask’.

Scientific beauty-enthusiast ‘skinchemy’ shares her thoughts on more effective active ingredients as opposed to ‘kitchen ingredients’ such as coconut oil and tea tree oil.
Virtual Beauty

The boundary between #Instabeauty and IRL beauty has never been so blurred. The daily feed of cheek-chiseled, lip-plump faces has given birth to an impossible ideal: the Instagram Face. Thanks to AR enhancements, this look is now widely accessible, but at what cost? With our better versions just one tap away, standards have drastically risen. Couple this with the presence of ever growing influencer endorsements, there’s no surprises that microsurgery and ‘tweakments’ have taken off; normalising plastic surgery for the masses. However, it’s more than just a beauty pageant. The meshing of virtual and digital beauty has also given rise to makeup art and many other creative realms. A quick search for ‘instamask’ pulls up images of freckly fish-laden faces, gothic cheek and forehead tattoos supplanted onto faces. Emergent subcultures such as VSCO and E-girls are readily making the most out of this, fashioning looks around creative filters and lenses. Digitally enhanced beauty is normalised, and now brands are even turning to virtual influencers such as Lil Miquela, Yoox and Noonouri to flog their new makeup collections.

Virtual Beauty: Next Steps

Virtual beauty and digital enhancements are now important forces dictating beauty trends. When looking to fuel innovation pipelines, tracking the evolution of AR filters and lenses is just as important as assessing new product hype, or what’s physically flying off the shelves.
Virtual Beauty

IN THE DATA

Sources: Brandwatch (query based off keywords relating to virtual beauty such as “instafilter” or “AR lens”), post count 14k
What are people saying?

Virtual Beauty

A beauty business describes the process of using neuromodulators to soften the muscles around the jaw to reduce squareness.

Brands are increasingly making their own lenses and filters, such as this for Comme Des Garçons.

Getting the ‘Instagram Face’ IRL through cosmetic augmentation and lip fillers.

Indie-generated AR filters get weirder and weirder, including this one that mimics a watchman mask.

From the surreal ‘face as a canvas’ to the softer, more subtle AR filters, Instagram is championing both radical originality and an everyday facelift.

Creative Face

Perfect Face
At Crowd DNA, we’re constantly tracking conversations online across a range of categories. This allows us to stay on top of what’s going on and identify dominant and emergent trends all around the world. We capture conversation and imagery around occasions, behaviours and brands in order to get a holistic understanding of what’s new in any particular category. Our wider cultural expertise spanning semiotics and trends gives us a head start on what the interesting category developments are and where to look first. This also helps us understand how they relate to broader cultural shifts. We then explore these individually across all the major social media platforms, pulling out data-driven insights and qualitative colour to get our heads around the trends. While each report covers a four month period, we often go back further to add more historical context to data points and cultural developments.

Each social platform has different data privacy and sharing conditions, which means the datasets we have access to are incredibly varied. Twitter, for example, allows full access to conversation data, while Instagram and Facebook are more private with heavy restrictions. Additionally, by nature of Twitter’s popularity in the US and other Western markets, the data is likely skewed towards brands and campaigns present in these markets. In the creation of each report, we always endeavour to take these nuances into consideration and provide as truthful a reflection of the conversations as possible.
Our Culture At Scale offering at Crowd DNA allows us to deliver audience, category and brand insights to meet a variety of research objectives. Harnessing large sets of publically available data allows us to add richness to our range of other research and strategy tools spanning qual, quant and semiotics. As a methodology, it can be used as an agile and efficient way of responding to challenges, able to add value at any stage of the project, or as a detailed method alone combining qualitative and quantitative understanding. It can also be powerfully combined with a range of different datasets, including Google Analytics, search data and behavioural data sets, allowing us to cross compare a variety of influencing factors. If you’d like to discuss how our Culture At Scale offering could help your business, please get in touch for more information.