Q2 2020 INDIE BEAUTY DEBRIEF

From shelter-in-place orders ramping up in April in response to the global COVID-19 pandemic, to Black Lives Matter protests erupting in June, Q2 2020 challenged many brands to navigate an unprecedented economic and cultural climate. Investment chatter remained relatively quiet given the economic uncertainty, and pauses in branded influencer content creation in June (as content shifted to focus on the BLM movement) contributed to quarter-over-quarter declines in Earned Media Value (EMV) for a majority of cosmetics, skincare, and haircare brands. However, many Black-owned indie brands posted impressive EMV growths in Q2, as influencers and brands alike used their platforms to shine a light on their favorite Black-owned brands and encourage their followers to support them.

With consumers spending their dollars more carefully than ever, our Q2 2020 indie beauty research found that brands that champion diversity, inclusivity, and sustainability—in both their product lineups and the causes they support—are continuing to see high-impact content creation and community expansion throughout this global pandemic and cultural revolution. For this report, we investigated six of these fast-growing brands, analyzing the factors fueling their EMV success.

Tribe Dynamics' quarterly Indie Beauty Debrief, which debuted in 2019, showcases notable independent beauty brands across cosmetics, skincare, and haircare. We reveal exclusive insights into trending and up-and-coming brands, their online communities, and the top-performing earned content created about them.

Note: The rankings throughout this report reflect each brand's EMV rank among independent cosmetics, skincare, and haircare brands.

TRIBE DYNAMICS



Photo by 3Motional Studio from Pexels

INTRODUCTION TO **EARNED MEDIA VALUE**

Earned Media Value, or EMV, is Tribe Dynamics' proprietary metric for quantifying the estimated value of consumer engagement with digital earned media. Our holistic approach assigns a unique value to a piece of content based on the engagement received from followers and consumers. This value is then attributed to the specific brands mentioned within the post. EMV can be used to evaluate the earned performance of individual marketing campaigns and benchmark brands within the competitive landscape.

Based on content from 120,000 of the most influential content creators across 14 country-specific markets, EMV reveals brands that are not just capturing consumer interest, but poised for significant growth.

Posts by:

- Influencers
- Brands
- Retailers
- Publications

Platforms including:

- Instagram
- YouTube
- Facebook
- Pinterest
- Twitter
- Websites
- Blogs
- TikTok*

Engagement via:

- Comments
- Tweets/Retweets
- Favorites
- Likes
- Pins/Repins
- Shares
- Video Views

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*TikTok data is currently not included in total brand EMV calculations, but is available to Tribe Dynamics customers.

#31 **Indie** Beauty Brand

BEAUTY BAKERIE BENEFITS FROM BLACK-OWNED BRAND ENTHUSIASM

Backed by a $3M investment in July 2018, **Beauty Bakerie**, the cruelty-free, bakery-inspired cosmetics line founded by Cashmere Nicole in 2011, collected $19.1M EMV in Q2, a 28% quarter-over-quarter growth. The brand's EMV surge partly stemmed from a 53% QoQ expansion of its influencer community, as many newcomers featured Beauty Bakerie products in their "Full Face of Black-Owned Makeup Brands" content—a trend that took over social media in June in support of the Black Lives Matter movement. However, the brand's most loyal influencer fans remained its top earners: nine of Beauty Bakerie's 10 highest-earning influencers in Q2 had also posted about the brand in Q1 2020—a strong community retention that signals continued success for Beauty Bakerie.

28%
QoQ

$19.1M
EMV IN Q2

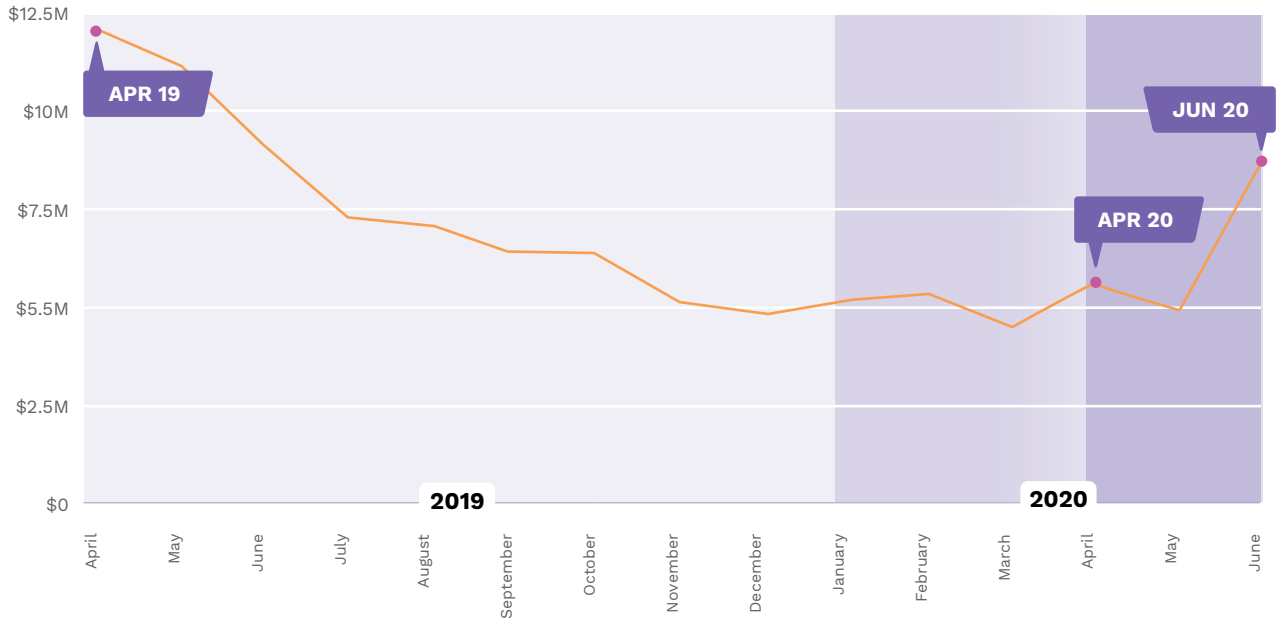
1.5k
Influencers

5.3k
Posts

3.5
Posts Per Influencer

$12.8k
EMV Per Influencer

Monthly EMV (April 2019 - June 2020)



APR 19 Beauty blogger Allie Binkowski (@allieballiemakeup on Instagram) drives $1.2M of Beauty Bakerie's $12.3M monthly EMV by featuring a range of Beauty Bakerie products in 74 posts.

APR 20 #MakeupForBlackWomen generates $850.6k EMV from 39 influencers, ranking among the brand's top five April hashtags.

JUN 20 Beauty Bakerie's hero Flour Setting Powder accrues $3.3M EMV from 190 content creators in June, it's highest monthly total since July 2019.

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#64 **Indie** Beauty Brand

COLOURED RAINE STANDS OUT WITH VIBRANT PRODUCTS

Known for its highly pigmented eyeshadow palettes and bold lipsticks, cruelty-free cosmetics brand **Coloured Raine** garnered $10.1M EMV in Q2, a 28% quarter-over-quarter increase that also stemmed in part from the groundswell of support for Black-owned brands in June. In Coloured Raine's top-earning Q2 post ($137.0k EMV), powerhouse influencer Nikkie de Jager (@nikkietutorials on Instagram) featured the brand's Empathy Satin Lipstick (something she stated "the world needs right now") in her tutorial using exclusively Black-owned brands. Many brands and influencers also promoted Coloured Raine's availability in Target, with mentions of "Target" driving $159.2k EMV.

28%
QoQ

$10.1M
EMV IN Q2

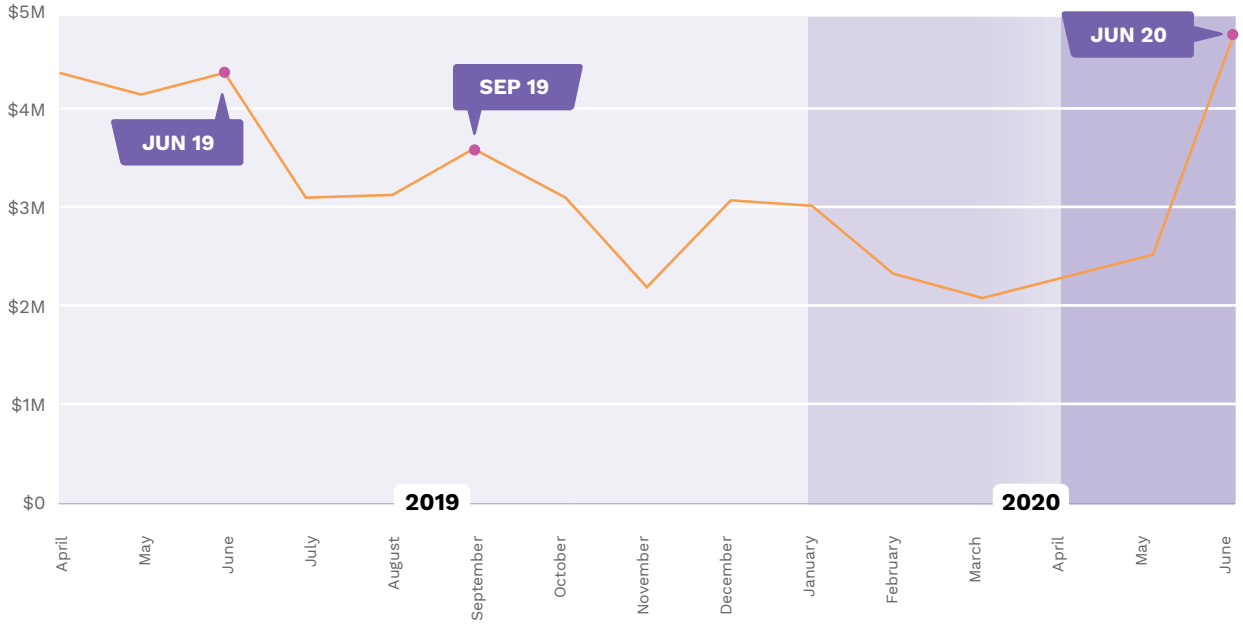
955
Influencers

3.7k
Posts

3.9
Posts Per Influencer

$10.6k
EMV Per Influencer

Monthly EMV (April 2019 - June 2020)



JUN 19 #Pride ($505.3k EMV) ranks among Coloured Raine's top 10 June hashtags, as 56 influencers use products like the Vivid Pigment Palette in their colorful Pride makeup looks.

SEP 19 Launched in August, Coloured Raine's Power Collection, a collaboration with Starz' crime drama series Power, picks up steam in September, garnering $888.0k EMV.

JUN 20 A total of 655 influencers mention the brand in June, up from 359 in May.

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#190 **Indie** Beauty Brand

COCOKIND WINS WITH CLEAN INGREDIENTS, INFLUENCER COLLAB

Founded by ex-JP Morgan equity researcher Priscilla Tsai in 2014, clean skincare brand **Cocokind** saw explosive growth in Q2, pulling in $2.9M EMV—a 184% quarter-over-quarter surge. The brand sparked influencer excitement throughout the quarter with multiple product launches, along with expanded availability on Ulta.com—adding to its existing retail partners, Target and Whole Foods. In April, Cocokind released its "Celery Duo" skin-smoothing set ($323.9k EMV), and in May, the brand re-launched its Sea Kale Clay Mask ($97.4k EMV), created in collaboration with wellness blogger Jeannette Ogden (@shutthekaleup on Instagram) back in October 2019. Jeannette effusively posted about the re-launch, sharing that she was "grateful" to the brand for "once again believing in this collaboration." Additionally, Cocokind won influencer praise in June by donating 100% of its profits each day for a week to various Black activist organizations, including the ACLU, Reclaim the Block, and The Loveland Foundation.

184%
QoQ

$2.9M
EMV IN Q2

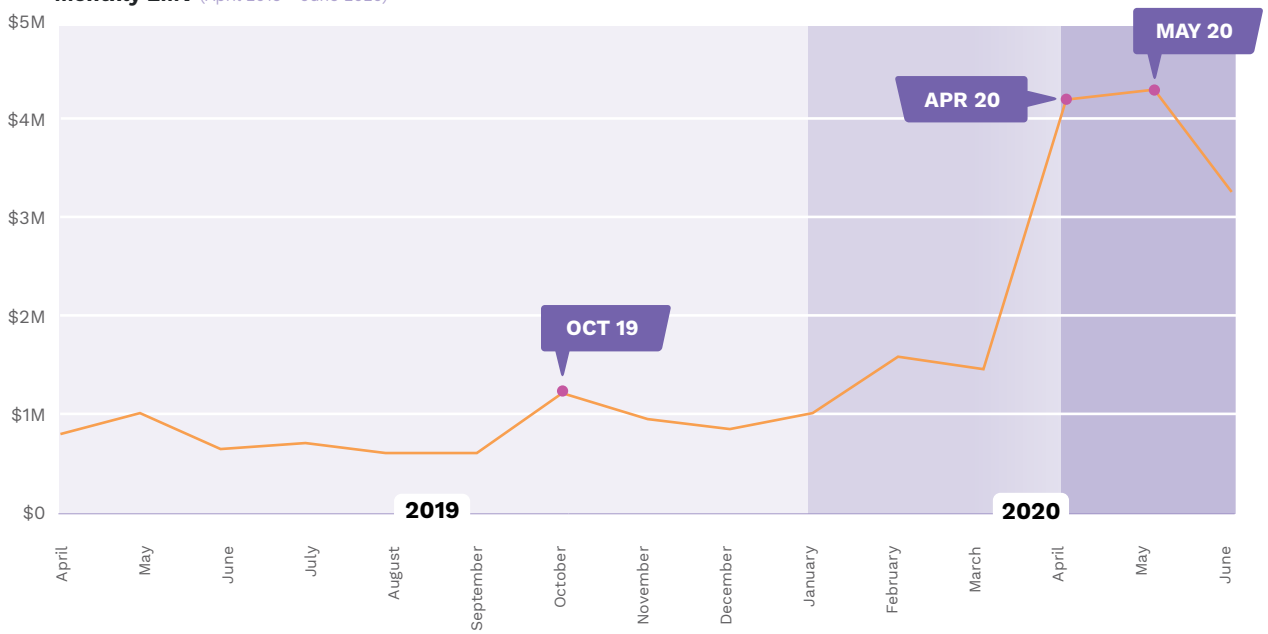
619
Influencers

2.7k
Posts

4.3
Posts Per Influencer

$4.7k
EMV Per Influencer

Monthly EMV (April 2019 - June 2020)



OCT 19 Cocokind launches the Sea Kale Clay Mask ($78.2k EMV) collaboration with Jeannette Ogden.

APR 20 Aided by the Celery Duo launch, 276 influencers mention the brand in April, a 393% year-over-year community expansion.

MAY 20 Jeannette Ogden (@shutthekaleup) ranks as Cocokind's top earner, driving $145.1k of the brand's $1.1M EMV total across 51 posts.

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#292 **Indie** Beauty Brand

STARFACE MAKES ACNE FUN, LAUNCHES FIRST CLEANSER

After launching in Q3 2019—and raising $2M in seed funding in February 2020—**Starface**, the celestial-themed, pimple-friendly skincare brand perfect for the Gen Z consumer netted $1.2M EMV in Q2, up 70% from Q1. While the brand is famous for its Hydro-Stars ($355.4k EMV) star-shaped pimple patches, Starface shook up its product lineup this quarter with the launch of Space Wash, its first facial cleanser. The product generated $110.8k EMV, featuring in skincare routine posts from influencers like teen beauty blogger Lindcey Nava (@lindceybeauty on Instagram). Thanks in part to the cleanser's release, the brand saw an influx of impactful influencers to its community this quarter: eight of Starface's top 10 earners in Q2 had not mentioned the brand in Q1. The brand's incoming influencer cohort generated a collective $931.5k EMV, or 76% of its Q2 total.

70%
QoQ

$1.2M
EMV IN Q2

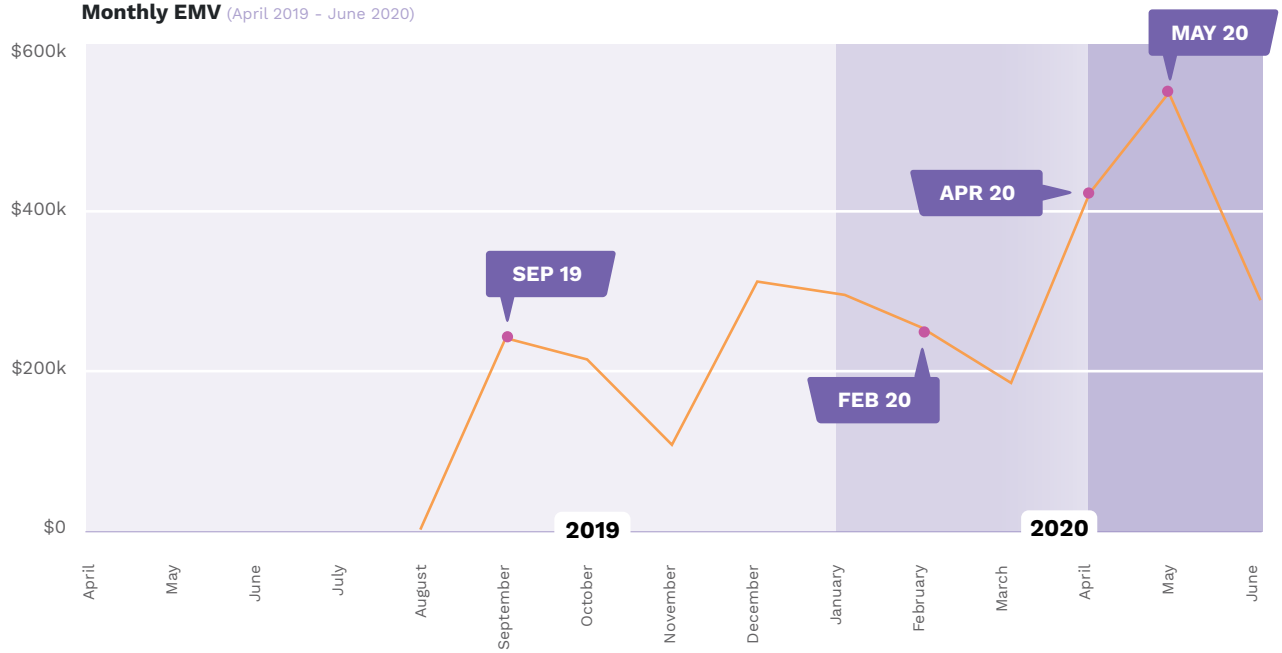
323
Influencers

717
Posts

2.2
Posts Per Influencer

$3.8k
EMV Per Influencer

Monthly EMV (April 2019 - June 2020)



SEP 19 Starface launches, collecting $236.8k EMV.

FEB 20 The brand raises $2M in seed funding from investors including BBG Ventures, Finn Capital Partners, and Brand Foundry Ventures.

APR 20 176 influencers mention Starface, the brand's largest monthly community size to date.

MAY 20 Starface features in Ipsy's May glam bag, with #Ipsy, #IpsyPartner, and #IpsyGetThatGlow accruing a collective $110.6k EMV.

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#167 Indie Beauty Brand

MIELLE ORGANICS POWERS GROWTH WITH NEW PRODUCTS AND THOUGHTFUL CAMPAIGNS

Founded by Monique Rodriguez in 2014, **Mielle Organics** saw a 156% quarter-over-quarter surge in EMV in Q2, closing the quarter with $3.4M EMV. The haircare brand benefited from Q2's wave of enthusiasm around Black-owned brands, with mentions of "Black-owned" and "Black owned" driving a collective $610.5k EMV for Mielle Organics. Additionally, many influencers like Alyssa Marie (@lyssamariexo on Instagram) organically included the brand's offerings in their #NaturalHair ($418.2k EMV) styles and tutorials throughout the quarter. Mielle Organics also inspired content creation in Q2 with the release of its Rice Water Collection and the launch of its #MoreThanAStrand campaign, which celebrated the bond between mothers and daughters. The Rice Water Collection garnered $460.0k EMV from 44 influencers, while #MoreThanAStrand netted $368.4k EMV as one of the brand's top five hashtags.

156% QoQ

$3.4M **EMV** IN Q2

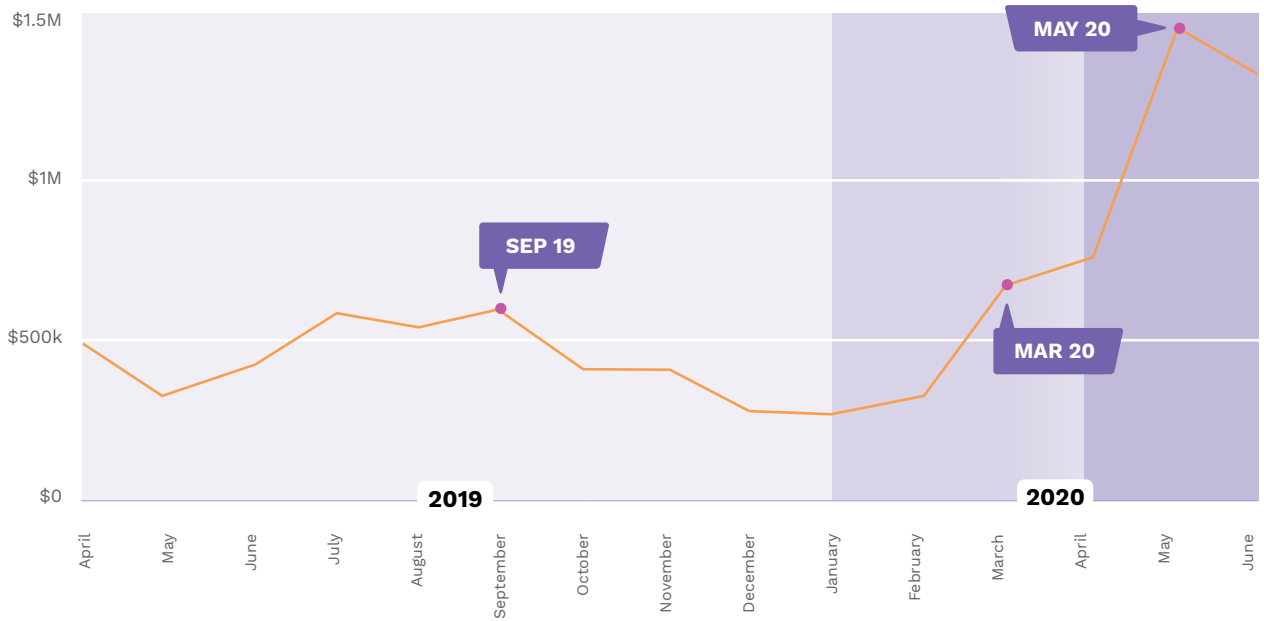
434 Influencers

1.3k Posts

2.9 **Posts** Per Influencer

$7.9k **EMV** Per Influencer

Monthly EMV (April 2019 - June 2020)



SEP 19 #NaturalHair ranks as Mielle Organics' top September hashtag, driving 22% ($128.2k) of the brand's $586.7k EMV total thanks to content from 16 influencers.

MAR 20 Antonia Johnson (@toyajohnson) is Mielle Organics' top earner by nearly $90k EMV, with $153.9k across nine posts, up 94% from her February EMV haul.

MAY 20 Influencers like Adrienne Houghton (@adriennebailon) feature Mielle Organics in their quarantine haircare routines, with mentions of "quarantine" generating $213.4k EMV for the brand.

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#263 **Indie** Beauty Brand

CURLSMITH ENJOYS COLORFUL, CURLY PRIDE CONTENT

Curlsmith, the clean haircare line made for curly-haired consumers, accrued $1.5M EMV in Q2, reflecting a 160% quarter-over-quarter jump thanks largely to several product launches. In April, the brand released its Weightless Air Dry Cream and Hydro Style Flexi Jelly, which generated a respective $383.9k and $275.4k EMV in a mix of sponsored and organic content. In June, Curlsmith introduced its Hair Makeup ($184.3k EMV), a range of temporary color styling gels timed perfectly for influencers' colorful Pride hair looks. Influencers mentioned Curlsmith in an average of 7.3 posts each in Q2, up from the brand's 4.3 posts per influencer average in Q1, indicating growing enthusiasm and regularity of use among its influencer community.

160% QoQ

$1.5M **EMV** IN Q2

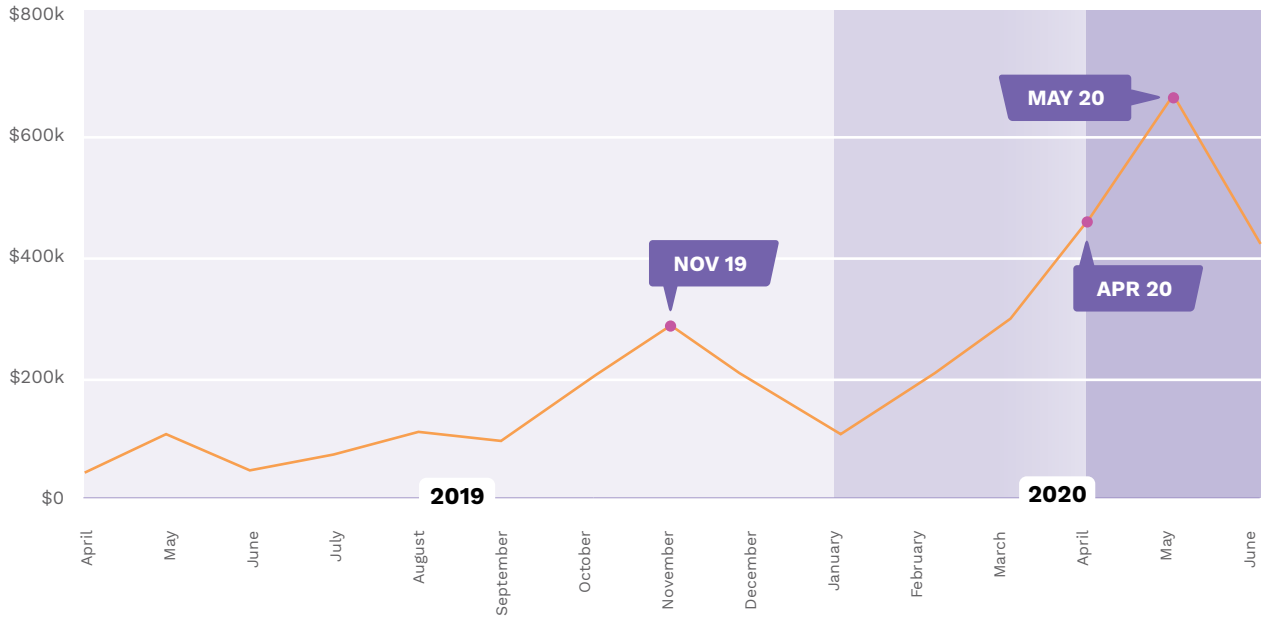
82 Influencers

598 Posts

7.3 **Posts** Per Influencer

$18.4k **EMV** Per Influencer

Monthly EMV (April 2019 - June 2020)



NOV 19 Curlsmith launches a 3-step scalp relief collection, earning high-impact endorsements from popular curly hair influencers like Bianca Renee (BiancaReneeToday on YouTube).

APR 20 #CurlyHair drives 28% ($126.8k) of Curlsmith's $454.5k EMV total as its top April hashtag.

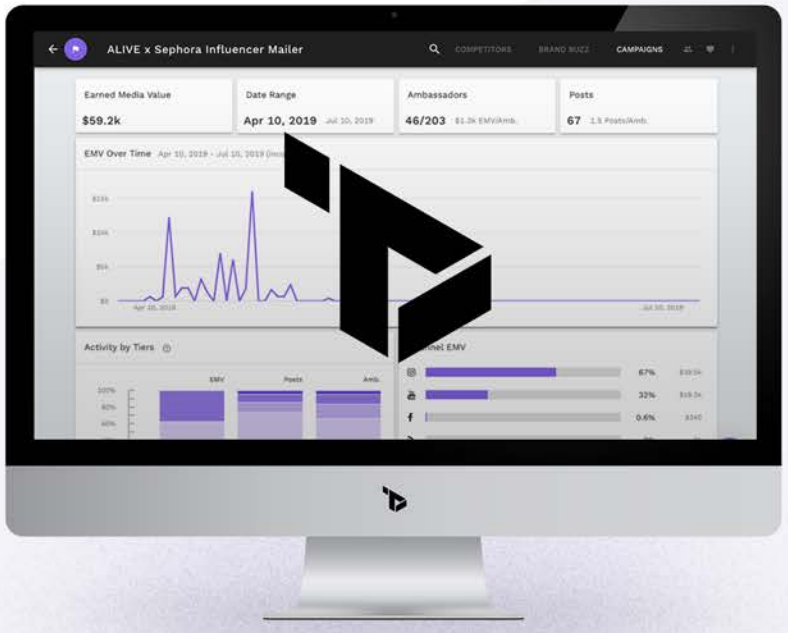
MAY 20 Thanks largely to the brand's late-April product launches, Curlsmith sees its largest community size (49 influencers) and post count (219 posts) to date.

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TRIBE DYNAMICS

HOW OUR INFLUENCER MARKETING SOFTWARE **CAN GROW YOUR BRAND...**

- **Identify** and reach out to the right influencers for your brand.
- **Manage** relationships and track influencer campaigns.
- Surface mentions of your brand by influencers across **all major social networks**.
- Benchmark **your brand performance** against competitors and the industry.



TRIBE DYNAMICS

Tribe Dynamics is a San Francisco-based software company that helps beauty, fashion, and lifestyle brands drive and measure high-impact digital earned media at scale.

Earned Media Value (EMV) is Tribe Dynamics' proprietary metric for measuring the online engagement of influencer content.

For more information, visit:

tribedynamics.com

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