TRIBE DYNAMICS

# Q1 2020 INDIE BEAUTY DEBRIEF

From Kylie Cosmetics to Dr.Jart+, Q4 2019 was a quarter packed with indie brand acquisitions. And while investment chatter slowed in Q1 2020, this didn't stop indie brands from continuing to turn heads in the beauty community and power notable EMV through exciting product launches and thoughtful influencer activations. In our Q1 research, we found that across cosmetics, skincare, and haircare, indie brands with affordable price tags and clean mission statements in particular gained significant traction among influencers. This reflects a broader preference shift in the beauty community toward brand transparency and sustainability. For our Q1 2020 Indie Beauty Debrief, we investigated six of these up-and-coming brands, analyzing the factors fueling their Earned Media Value 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.



Photo by George Bohunicky on Unsplash

# 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

### Engagement via:

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


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# #62 **Indie** Beauty Brand

## **TATI BEAUTY** SPARKS BUZZ WITH BLENDIFUL LAUNCH

Founded by YouTube beauty maven and product review queen Tati Westbrook in October 2019, **Tati Beauty**, a vegan and cruelty-free cosmetics brand, maintained launch momentum with its $10.3M EMV in Q1, a 6% quarter-over-quarter bump. The brand's debut product, the Textured Neutrals Vol 1 eyeshadow palette sustained its popularity into Q1, collecting $2.8M EMV. Additionally, in January, Tati Beauty inspired a flurry of content creation by introducing its second product, The Blendiful, a versatile makeup applicator puff. Influencers raced to try the product, which received generally positive reviews and netted a total of $5.0M EMV from 502 content creators this quarter, nearly half (204) of whom mentioned The Blendiful more than once.

**6%**
QoQ

**$10.3M**
**EMV** IN Q1

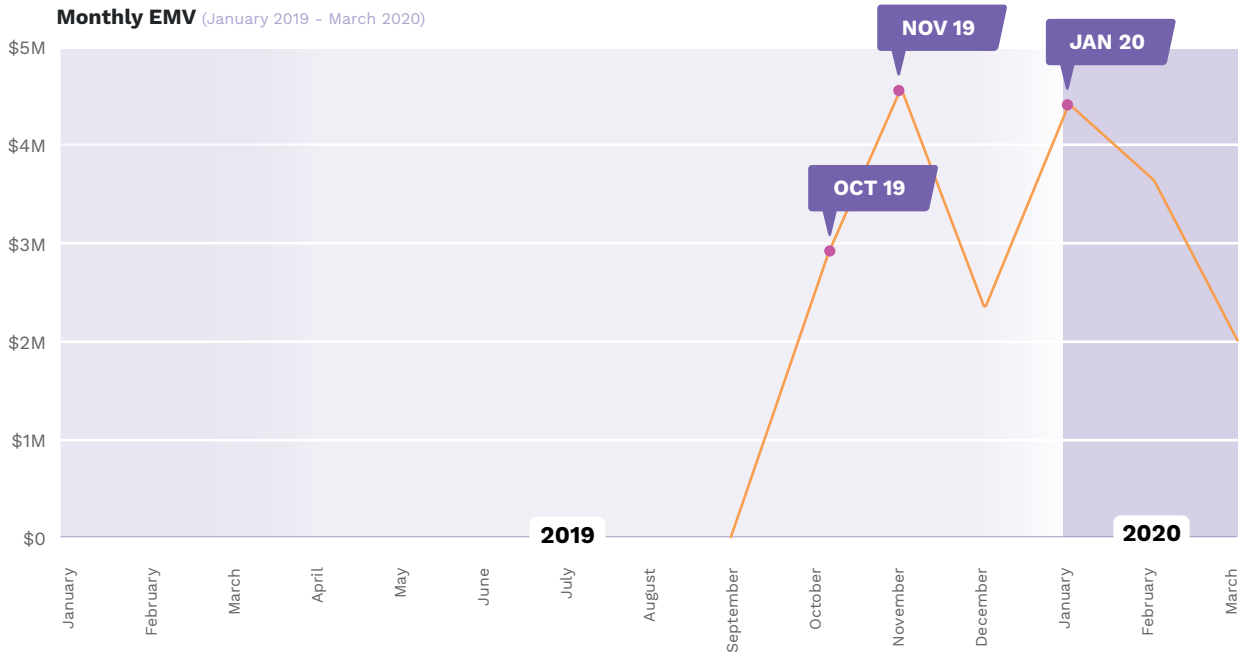
**820**
Influencers

**3.0k**
Posts

**3.7**
**Posts** Per Influencer

**$12.5k**
**EMV** Per Influencer

**Monthly EMV** (January 2019 - March 2020)




**OCT 19** Tati Beauty launches at the end of the month.

**NOV 19** Influencers excitedly review the brand's first product, the Textured Neutrals Vol 1 eyeshadow palette, which accrues $2.7M EMV from 361 content creators.

**JAN 20** Thanks to The Blendiful release, Tati Beauty sees its largest monthly influencer community of 514 influencers.


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# #83 **Indie** Beauty Brand

## **KAJA BEAUTY** EARNS INFLUENCER STAMP OF APPROVAL

**Kaja Beauty**, a K-beauty cosmetics brand launched in 2018, garnered $7.0M EMV in Q1, achieving a 19% quarter-over-quarter increase. The brand has caught the beauty community's attention with innovative—and Instagram-friendly—products, such as its heart-shaped Cheeky Stamp Blendable stamp-on blush ($1.4M EMV) and Beauty Bento Bouncy Shimmer Eyeshadow Trio ($662.4k EMV). Throughout Q1, Kaja Beauty benefited from organic endorsements from impactful and consistent influencer fans: each of the brand's top 10 EMV-drivers had also posted about Kaja Beauty in Q4 2019, increasing their EMV contributions by an average of 200% QoQ. In February, Kaja Beauty also sparked Valentine's Day buzz by curating a limited-edition To All The Boys: P.S. I Still Love You beauty set inspired by the popular Netflix film's release.

**19%**
QoQ

**$7.0M**
**EMV** IN Q1

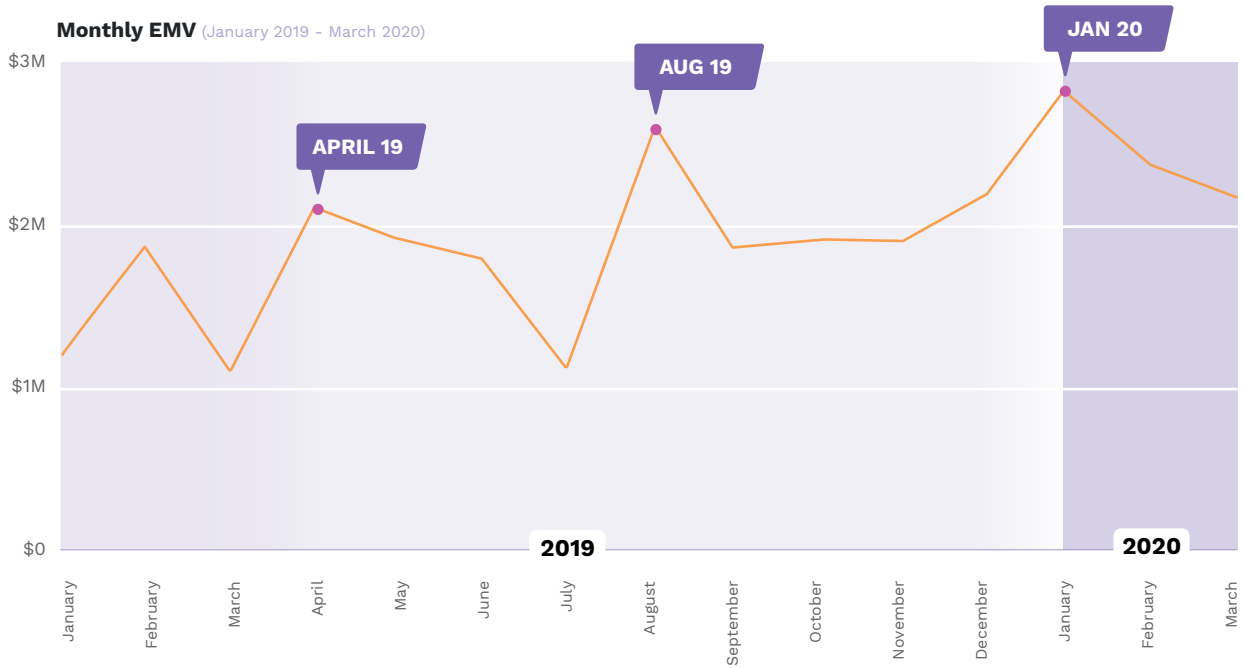
**431**
Influencers

**1.1k**
Posts

**2.6**
**Posts** Per Influencer

**$16.2k**
**EMV** Per Influencer

**Monthly EMV** (January 2019 - March 2020)




**APRIL 19** Kaja Beauty launches its Moon Crystal Shimmering Eye Pigments, which many influencers include in their "Sephora VIB Sale Wishlist" content.

**AUG 19** The brand introduces its Wink Stamp stamp-on eyeliner, which garners $519.9k EMV from 31 influencers.

**JAN 20** Kaja Beauty's top earners increase their EMV contributions from December, resulting in the brand's highest monthly EMV per Influencer average ($14.3k EMV each) from January 2019 to March 2020.


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# #55 Indie Beauty Brand

## GOOD MOLECULES WINS WITH AFFORDABLE SKINCARE

Launched in 2019, **Good Molecules** made a splash in the beauty community this quarter, accruing $11.5M EMV—a 117% quarter-over-quarter jump. The up-and-coming skincare line is often compared to The Ordinary, boasting a line of "simple, yet effective" skincare products at an affordable price. In Q1, Good Molecules stoked influencer excitement with multiple product releases, like the Caffeine Energizing Hydrogel Eye Patches ($913.2k EMV) in February and the Pineapple Exfoliating Powder ($171.7k EMV) in March. However, the brand's hero product has proven to be its Silicone-Free Priming Moisturizer, which launched at the end of 2019. The moisturizer netted $5.4M EMV from 690 influencers this quarter, accounting for 47% of Good Molecules' total Q1 EMV.

**117%**
QoQ

**$11.5M**
**EMV** IN Q1

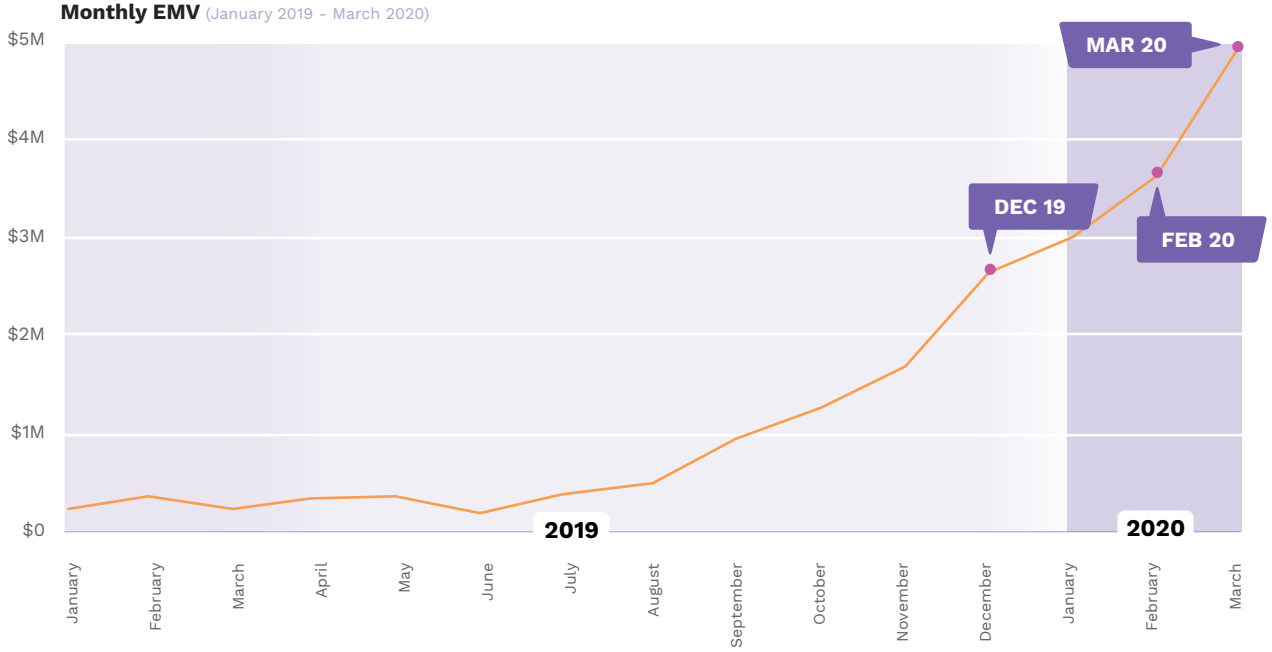
**1.2k**
Influencers

**4.2k**
Posts

**3.7**
**Posts** Per Influencer

**$10.0k**
**EMV** Per Influencer

**Monthly EMV** (January 2019 - March 2020)




**DEC 19** Launched at the end of November, the Silicone-Free Priming Moisturizer drives $1.2M EMV in December, with 244 influencers featuring it in organic content.

**FEB 20** Beauty bloggers like Alexandra Johnson (@alyczandra), the brand's top February earner, use Good Molecules' products to prep and prime their face for Instagram makeup looks.

**MAR 20** A total of 753 content creators mention Good Molecules in a collective 1.8k posts in March, the brand's largest monthly community size and post count from January 2019 to March 2020.


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# #300 **Indie** Beauty Brand

## **SWEET CHEF** GROWS BRAND AWARENESS THROUGH IPSY

Launched by the founders of cult-favorite skincare brand Glow Recipe in Q1 2019, **Sweet Chef**, an affordable, clean, veggie-powered skincare brand, collected $1.1M EMV in Q1 2020, an impressive 152% quarter-over-quarter growth. The brand garnered some major buzz this quarter thanks to product features in Ipsy's January and February Glam Bags. #Ipsy emerged as one of Sweet Chef's top-earning Q1 hashtags with $119.0k EMV from 23 influencers. Throughout the quarter, the brand also saw organic enthusiasm among influencers like Paola Matute (@paox33 on Instagram) and Hannah Mussette (@mussette), who repeatedly featured Sweet Chef's range of Serum Shots in their skincare and makeup routines as two of the brand's 10 highest-earning content creators.

**152%**
QoQ

**$1.1M**
**EMV** IN Q1

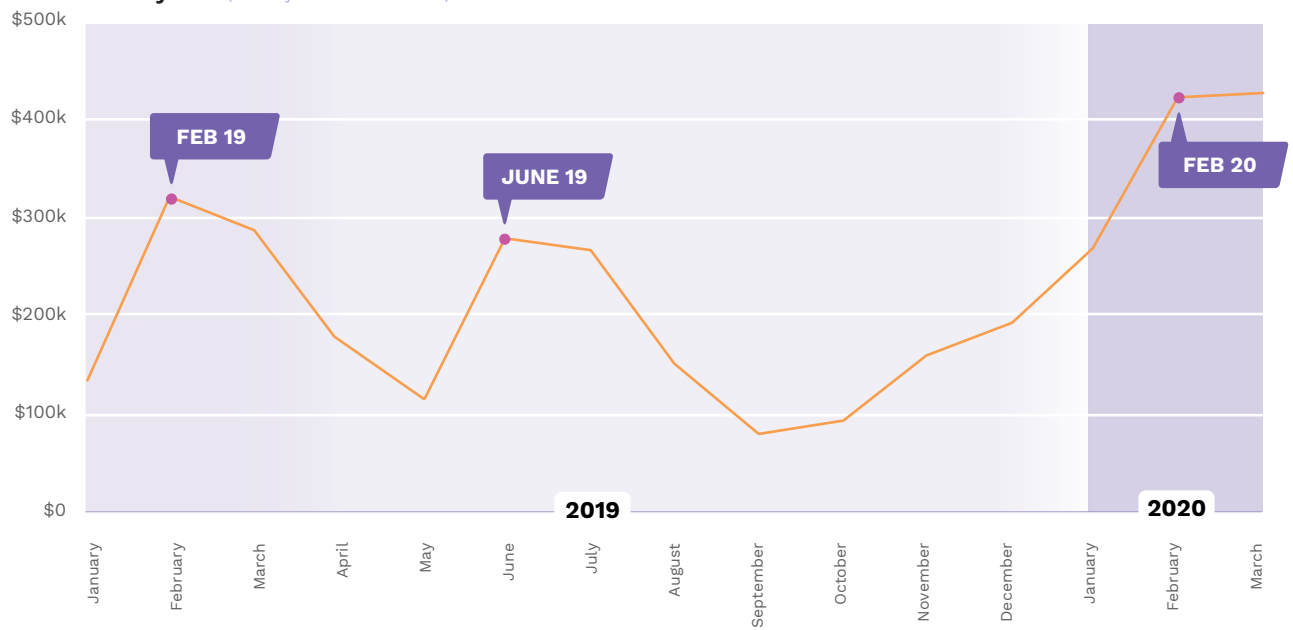
**129**
Influencers

**256**
Posts

**2.0**
**Posts** Per Influencer

**$8.3k**
**EMV** Per Influencer

**Monthly EMV** (January 2019 - March 2020)




**FEB 19** Following its late January 2019 launch, 43 influencers mention Sweet Chef in February, sharing their excitement to try the brand's serums and sheet masks.

**JUNE 19** After not posting about Sweet Chef in May, beauty blogger Lizeth Ramirez (@lizethramirez_ on Instagram) drives $100.1k EMV across two posts as the brand's top June earner by nearly $50k EMV.

**FEB 20** Thanks in part to its Ipsy inclusion, 57 influencers mention Sweet Chef in their February content—the brand's largest monthly community size from January 2019 to March 2020.


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# #202 **Indie** Beauty Brand

## **EVA NYC** SHINES IN INSTAGRAM HAIR TUTORIALS

**Eva NYC**, a cruelty-free haircare and hair tool brand with vibrantly colored, highly Instagrammable products targeted at millennial and Gen Z consumers, posted $2.3M EMV in Q1, reflecting an 8% quarter-over-quarter boost. While the brand sponsored a handful of influencer posts throughout the quarter (15 of the brand's top 50 posts were sponsored), much of Eva NYC's top-earning content was organic. Bloggers like Victoria Lyn (@victorialyn on Instagram) featured Eva NYC products such as the Mane Magic 10-in-1 Primer ($455.9k EMV) in their #HairTutorial content—the hashtag drove $364.8k EMV from 25 influencers as the brand's No. 2 Q1 tag behind #EvaNYC ($413.5k EMV).

**8%**
QoQ

**$2.3M**
**EMV** IN Q1

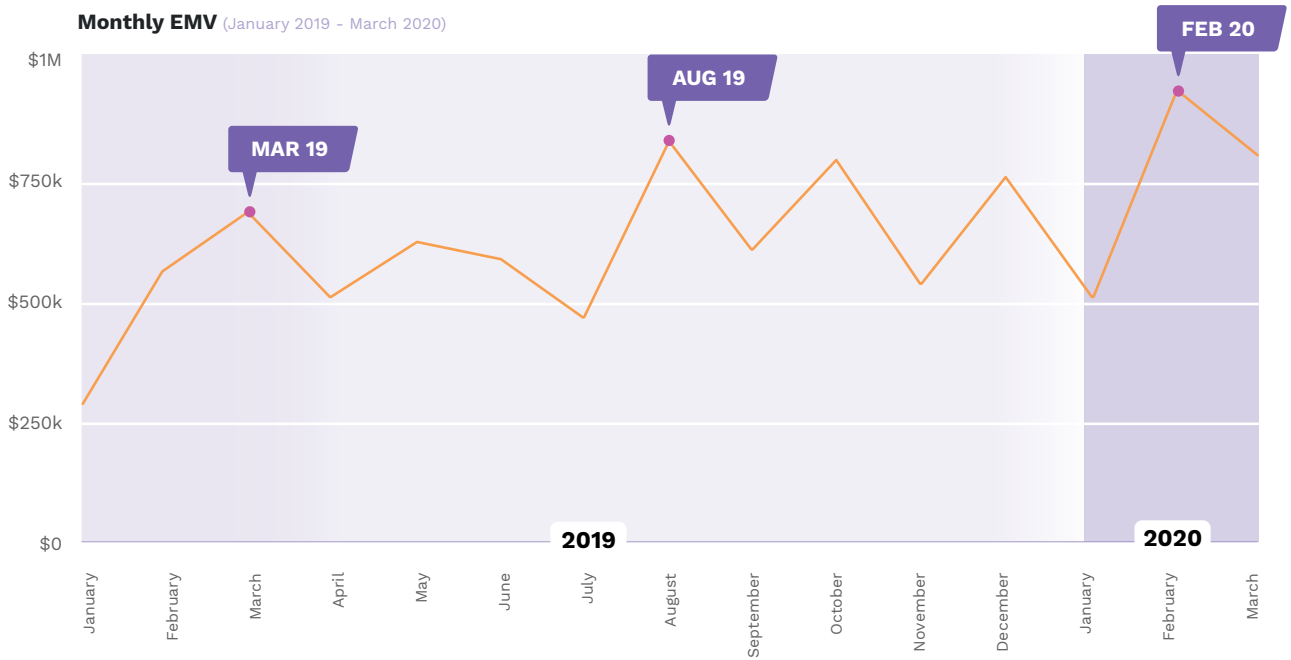
**283**
Influencers

**604**
Posts

**2.1**
**Posts** Per Influencer

**$8.2k**
**EMV** Per Influencer

**Monthly EMV** (January 2019 - March 2020)




**MAR 19** Many influencers test out the brand's new Mini Healthy Heat Thermal Straightening Brush and promote its availability at Target, with #EvaxTarget driving $359.3k EMV.

**AUG 19** Eva NYC features widely in influencer giveaway content.

**FEB 20** The brand launches its Deeptox Exfoliating Salt Shampoo, which generates $143.2k EMV from 11 influencers.


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# #276 **Indie** Beauty Brand

## **FEKKAI** REBRANDS WITH SUSTAINABILITY FOCUS

Founded by French celebrity hairstylist Frédéric Fekkai in 1995, the **Fekkai** haircare brand underwent a major transformation in 2020, officially relaunching in January as a clean, cruelty-free haircare line with a commitment to sustainability: Fekkai's packaging is made of 95% recycled plastic, and each product is vegan and 100% recyclable. The brand also revamped its influencer program this quarter, tapping influencers like blogger Irene Khan (@irenesarah on Instagram) and surfer Anastasia Ashley (@anastasiaashley) for its "Friend of Fekkai" partnership program. In content from a beach salon and coastal clean-up activation Fekkai held in January, Anastasia shared that she was "so happy to partner with a brand that is doing good in the world." In all, Fekkai closed Q1 with $1.3M EMV, a whopping 457% quarter-over-quarter growth.

**457%**
QoQ

**$1.3M**
**EMV** IN Q1

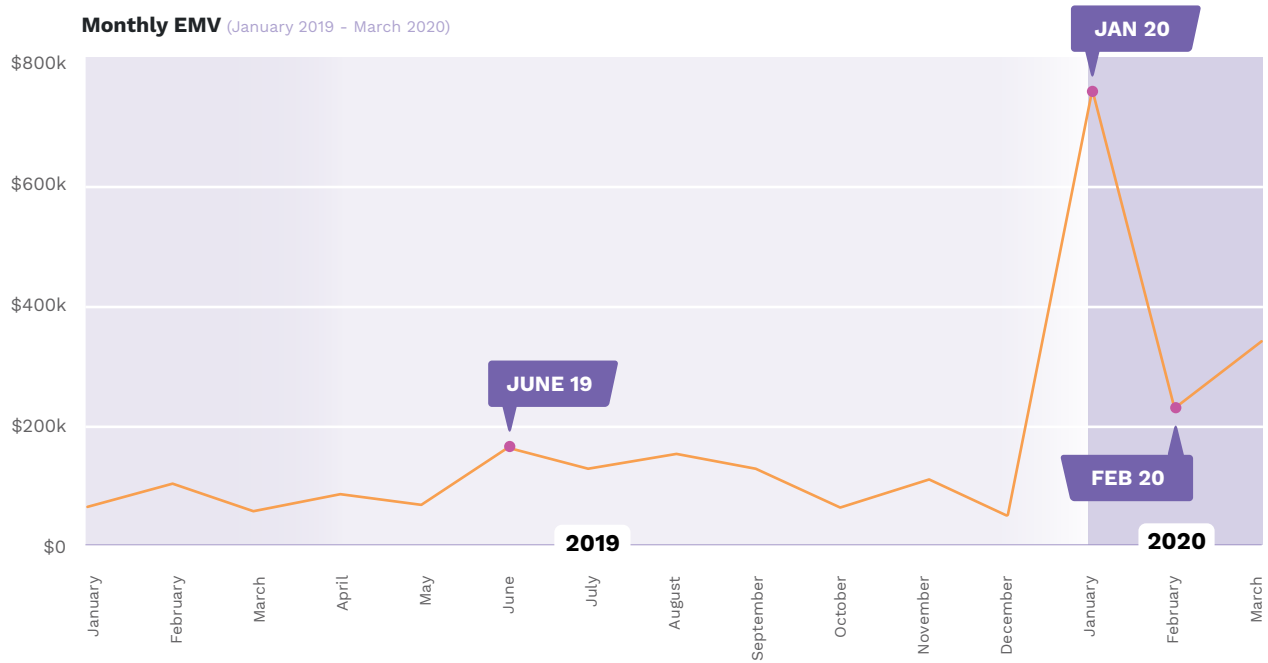
**149**
Influencers

**393**
Posts

**2.6**
**Posts** Per Influencer

**$8.7k**
**EMV** Per Influencer

**Monthly EMV** (January 2019 - March 2020)




**JUNE 19** #FekkaiFan drove $49.6k EMV as one of the brand's top three June hashtags, with nineteen influencers featuring it in sponsored content promoting Fekkai products.

**JAN 20** Following its rebrand, 79 influencers mention the brand in January 2020, up from 29 in December 2019. Fekkai partners promoted the brand's refocus on sustainability in content tagged #FollowYourHair ($174.6k EMV).

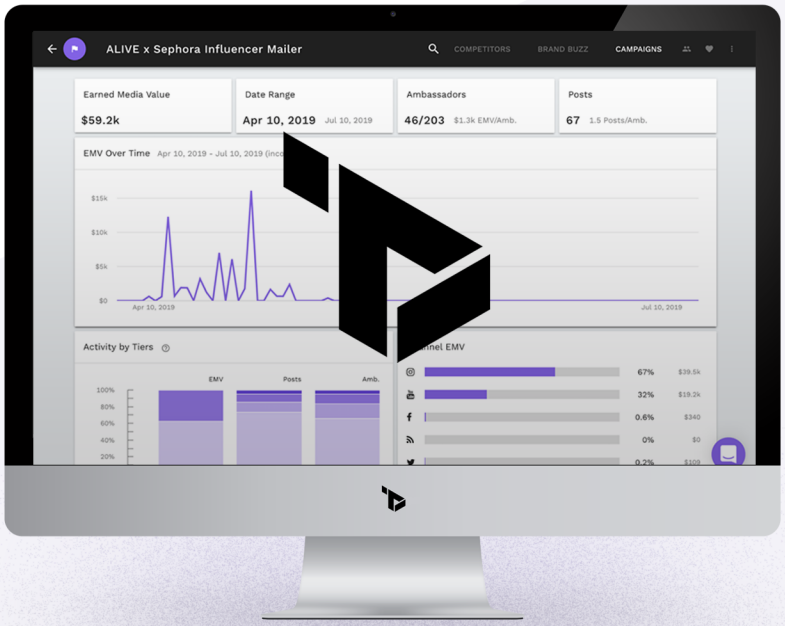
**FEB 20** Eleven influencers mention products from Fekkai's Brilliant Gloss range ($77.3k EMV) in a mix of sponsored and organic content.


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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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