TRIBE DYNAMICS

Q3 Beauty Report:
A Deeper Look at Influencer Communities

Contents

Introduction

Digital content creators—individuals who post, snap, tag, and share much of their lives with followers—are driving conversation and conversion for Beauty brands. But, no one woman (or man) stands alone. Long-term growth is fueled by a diverse network of content creators that make up a brand's ambassador community.

At Tribe Dynamics, we help brands build, scale and measure the Earned Media Value (EMV) of these conversations, quantifying the estimated value of digital word of mouth and its respective engagement levels.

The following pages take a deeper look at the unique characteristics of ambassador communities across top-performing Cosmetics, Skincare and Haircare brands to better understand what drives success.

We hope you enjoy our insights.

Conor Begley
Co-Founder & President, Tribe Dynamics

Part 1: Exploring Influencer Communities

A community of influencers is not solely defined by how much Earned Media Value (EMV) it produces for a particular brand. Despite earning similar amounts of EMV, two brands may nevertheless receive engagement from influencer communities of varying size, engagement levels, and posting frequency. Brands that understand and appreciate these aspects of their influencer community cannot only determine whether their community is healthy today, but also determine an appropriate strategy for strengthening their community going forward.

The graph below shows how, in Q3 2016, five sets of beauty brands varied across three characteristics: engagement, as measured by the total EMV produced per ambassador; posting frequency, as measured by the total number of posts created per ambassador; and size, as measured by the number of ambassadors that talked about the brand.

Circle size denotes size of ambassador community

○ 500 ambassadors

○ 1500

○ 3000
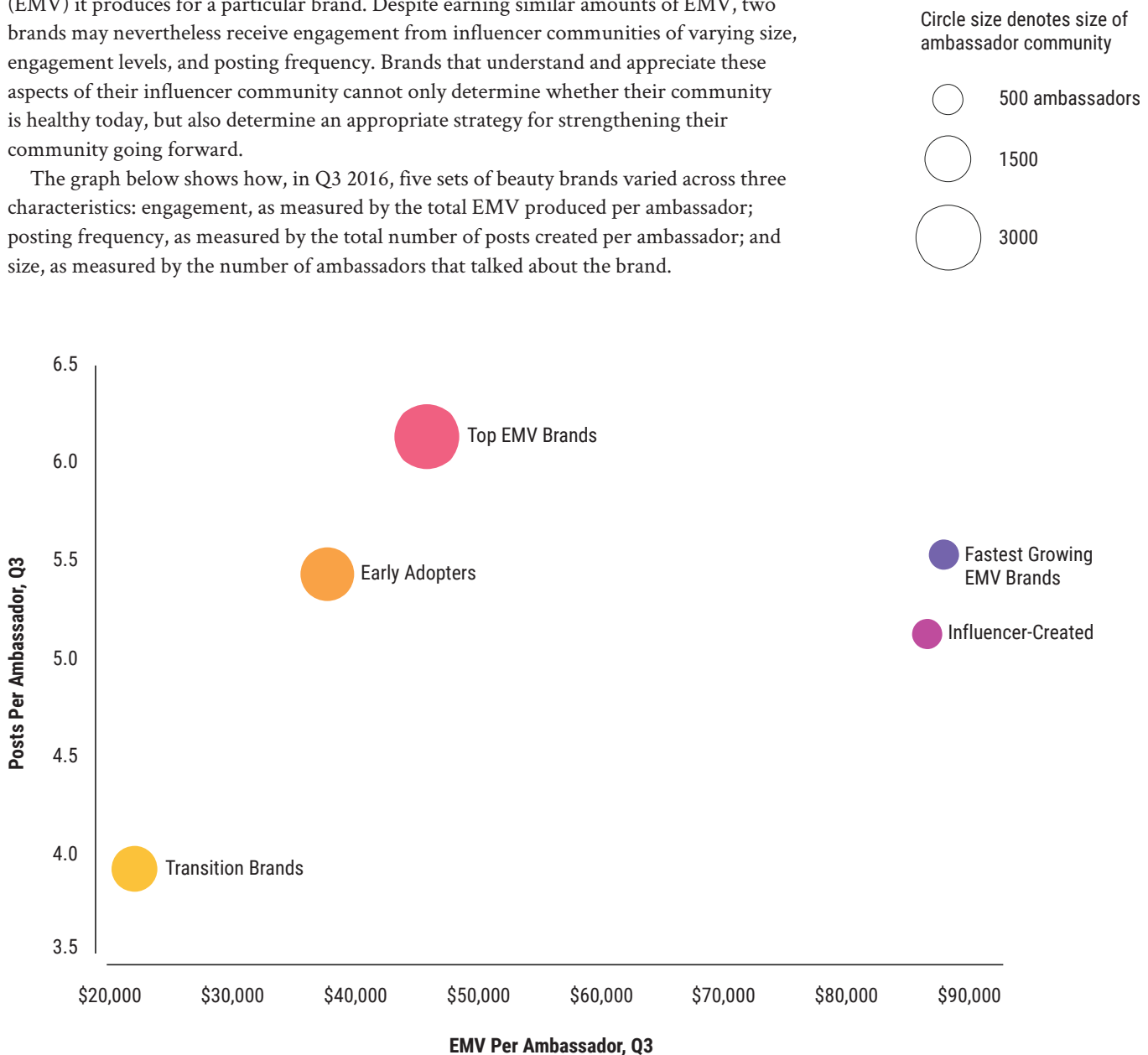
Top EMV Brands
Top five brands by EMV in Q3 2016.
Anastasia Beverly Hills, MAC, Benefit, Tarte, Urban Decay

Fastest Growing EMV Brands
Top five brands by year-over-year EMV gains between Q3 2015 and Q3 2016.
Jouer Cosmetics, Ofra, Lilly Lashes, Jeffree Star Cosmetics, Smashbox

Early Adopters
Brands known to have been at the vanguard of influencer engagement.
Too Faced, NYX, Make Up For Ever, Becca

Influencer-Created
Brands founded by prominent beauty influencers.
Jeffree Star Cosmetics, Huda Beauty, Kylie Cosmetics, Lilly Lashes
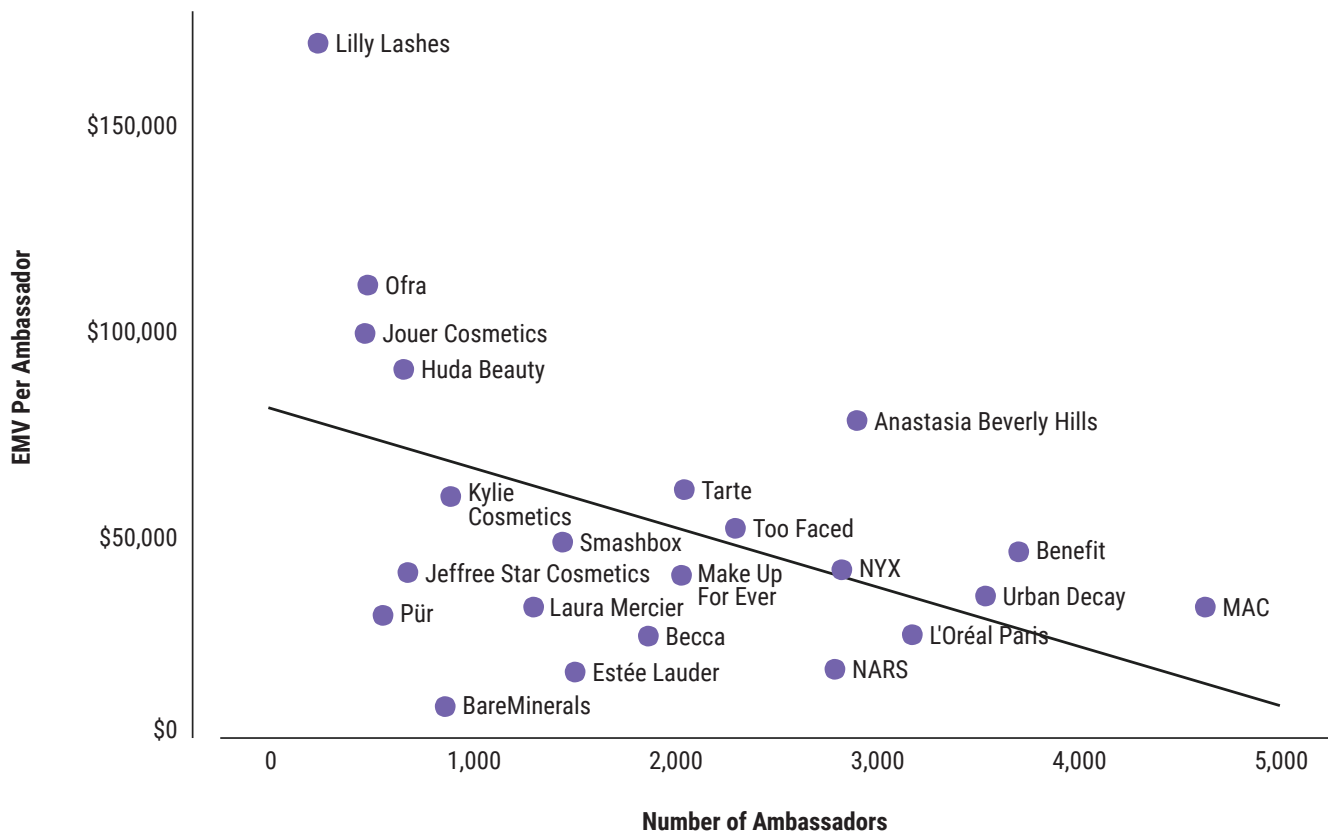
Transition Brands
Established brands that have more recently begun to invest in the influencer space.
NARS, Estee Lauder, L'Oréal Paris, Laura Mercier, BareMinerals

When plotted along these three dimensions, the five sets of brands separate into two distinct groups: brands with smaller influencer communities (Fastest-Growing EMV Brands and Influencer-Created Brands) and brands with larger influencer communities (Top EMV Brands, Early Adopters, Transition Brands).

Brands with smaller communities are notable for generating large amounts of EMV relative to the number of ambassadors talking about them. The average Fastest-Growing EMV Brand generated $89.1K EMV per ambassador in Q3, for example, while the average Influencer-Created Brand generated only slightly less EMV per ambassador ($87.7K). These levels are almost double that of the next-highest set of brands.

What distinguishes these two sets of brands, however, is the number of posts produced per ambassador. The Fastest-Growing EMV Brands generated an average of 5.5 posts per ambassador in Q3, whereas Influencer-Created Brands generated fewer posts per ambassador (5.1). Regardless of this small difference, both sets of brands are growing due to the high engagement levels in their small, vibrant communities.

On the other side of the spectrum, the brands with larger communities (Top EMV Brands, Early Adopters, Transition Brands) have lower levels of EMV per ambassador on average. This is true for even the Top EMV Brands, where the typical brand earned $46.1K EMV per ambassador in Q3, less than half of the average for brands with smaller communities.

This does not necessarily mean that the Top EMV Brands could easily improve the amount of EMV they are producing per ambassador, however. In fact, as the chart above illustrates, there appears to be an unavoidable trade-off between size and engagement: brands with larger influencer communities never achieve the high engagement levels of smaller brands like Lilly Lashes, Ofra, and Jouer Cosmetics.

The negative trend in this graph indicates that it is highly unlikely for brands that have a large number of ambassadors to match the EMV-per-ambassador levels of smaller brands. Although there are brands like Anastasia Beverly Hills that earn substantially more EMV

per ambassador than brands with similarly sized communities, they fail to reach the high marks set by smaller brands like Huda Beauty. Growing a large influencer community, as brands like MAC and Benefit have done, necessarily involves being posted about by lower-tier ambassadors who, while boosting the brand's overall EMV levels, lower the community's EMV per ambassador.

Still, this does not mean that larger brands should ignore the amount of EMV they produce per ambassador. As the first graph depicted, the Top EMV Brands have a higher average EMV per ambassador as compared to either Early Adopters or Transition Brands ($46.1K EMV versus $38.0K and $22.3K, respectively). Furthermore, Top EMV Brands also elicit more posts per ambassador than either of the other sets of brands with larger influencer communities (6.1 posts per ambassador versus 5.4 for Early Adopters and 3.9 for Transition Brands).

All else equal, getting a community of ambassadors to either post more frequently or generate more engaging content benefits a brand, leading to either high levels of EMV or EMV growth (as we saw with the Top EMV Brands and the Fastest-Growing EMV Brands). However, as brands grow their influencer communities, they must expand beyond a small group of highly engaging influencers and necessarily lower the amount of EMV they earn per ambassador.

Strengthening Influencer Communities

Taking these dynamics into account, there are two distinct paths for strengthening a brand's community of ambassadors.

If a brand has a small influencer community, with high EMV per ambassador, it should focus on growing its community out from this base. Working with lower-tier or up-and-coming ambassadors makes sense as part of the brand's strategy, particularly when there is a possibility of a virtuous cycle: if a smaller brand engages with an up-and-coming ambassador to help them grow their engagement levels, that ambassador can deliver higher levels of engagement for the brand over time, creating a win-win relationship.

For smaller brands looking to retain the quality of their influencer community while growing its size, strategies that guide new members of the brand's community to produce engaging content for followers are critical.

By contrast, if a brand has a large influencer community, with relatively low EMV per ambassador, it should focus on getting its community to create more engaging content more frequently. A good campaign for these brands doesn't necessarily need to go viral and engage a new set of influencers; rather, it needs to simply energize the brand's existing community.* Giving current ambassadors a reason to post engaging content more frequently about the brand—whether through campaigns, product launches, or photogenic products—will help these brands capitalize on the size on the community that they are already engaging.

Whether a brand has a small, highly engaged base of devotees, or a larger, less-engaged set of influencers, strengthening its current influencer community is vital for the success of the brand.

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*One caveat here: If a brand's current influencer community isn't a good fit—whether because the company has recently rebranded, a product line has changed, or the current community contains a sizable number of occasional posters who are unlikely to produce engaging content in the future—then the brand should focus on building relationships with new influencers that would fit into the brand's desired community.

Part 2: Top 10 Brands

Each quarter, Tribe Dynamics announces the top 10 brands in EMV performance for Cosmetics, Haircare, and Skincare.

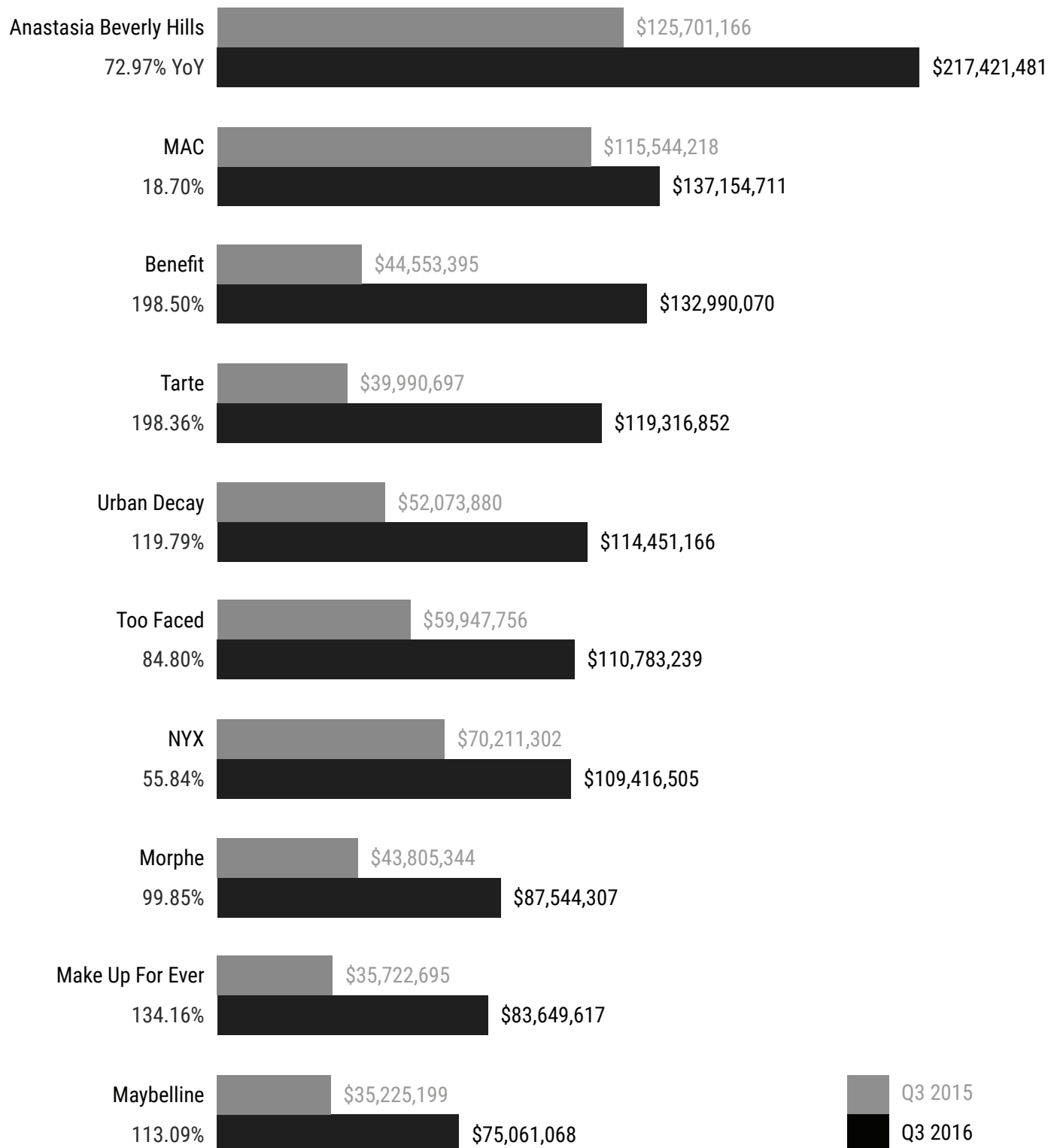This quarter we are offering a deeper look into the ambassador communities behind these 10 brands (see research in Part 1). After ranking the top 10 brands by EMV in each category, we rank each brand by three key categories for Q3:

1. **Engagement**
   Total EMV produced per ambassador

2. **Activity Level**
   Total number of posts created per ambassador

3. **Size**
   Number of unique ambassadors that posted about the brand

Cosmetics

EMV Leaderboard Highlights

1. Anastasia Beverly Hills continued to hold the top spot, while MAC kept its second-place rank, bolstered by newly released cultural icon collections.

2. Tarte moved up one spot to #4, thanks to three new product collaborations and a slew of additional influencer engagement initiatives.

3. Make Up For Ever and Maybelline replaced ColourPop and Huda Beauty to rank in Q3's top 10.

Top 10 Cosmetics EMV

Anastasia Beverly Hills
$125,701,166
72.97% YoY
$217,421,481

MAC
$115,544,218
18.70%
$137,154,711

Benefit
$44,553,395
198.50%
$132,990,070

Tarte
$39,990,697
198.36%
$119,316,852

Urban Decay
$52,073,880
119.79%
$114,451,166

Too Faced
$59,947,756
84.80%
$110,783,239

NYX
$70,211,302
55.84%
$109,416,505

Morphe
$43,805,344
99.85%
$87,544,307

Make Up For Ever
$35,722,695
134.16%
$83,649,617

Maybelline
$35,225,199
113.09%
$75,061,068

Q3 2015
Q3 2016

EMV Per Ambassador Posting About A Brand

Morphe	$87,196
Anastasia Beverly Hills	$74,741
Tarte	$58,062
Too Faced	$48,041
Make Up For Ever	$41,025
NYX	$38,869
Benefit	$35,789
Urban Decay	$32,240
MAC	$29,546
Maybelline	$27,395

Total Number of Ambassadors

MAC	4,642
Benefit	3,716
Urban Decay	3,550
Anastasia Beverly Hills	2,909
NYX	2,815
Maybelline	2,740
Too Faced	2,306
Tarte	2,055
Make Up For Ever	2,039
Morphe	1,004

Average Number Of Posts Per Ambassador

Brand	Value
Anastasia Beverly Hills	8.22
Morphe	6.91
Urban Decay	6.51
Too Faced	6.16
MAC	6.09
Make Up For Ever	6.00
Tarte	5.52
NYX	5.38
Maybelline	4.93
Benefit	4.36

MAC
MAC had the largest influencer community, ranking #2 in overall EMV despite having lower rankings in EMV per ambassador and number of posts per ambassador.

Maybelline
Unlike Morphe, the other new entrant to the top 10, Maybelline generated its EMV with a larger community of less-engaged ambassadors (i.e., it had a lower EMV per ambassador).
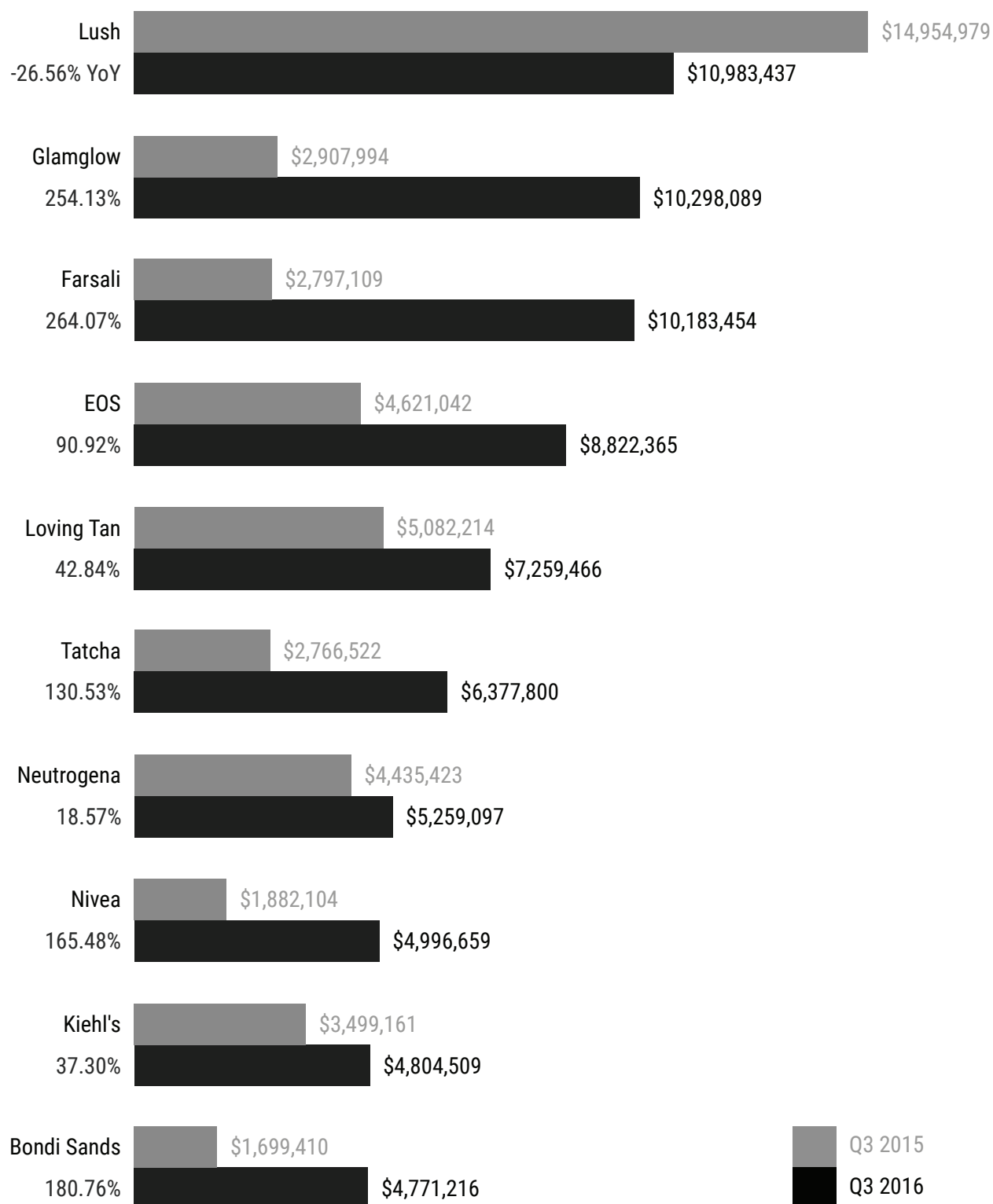
Morphe
Despite having the smallest influencer community, Morphe led all brands in EMV per ambassador, which propelled it into the top 10.
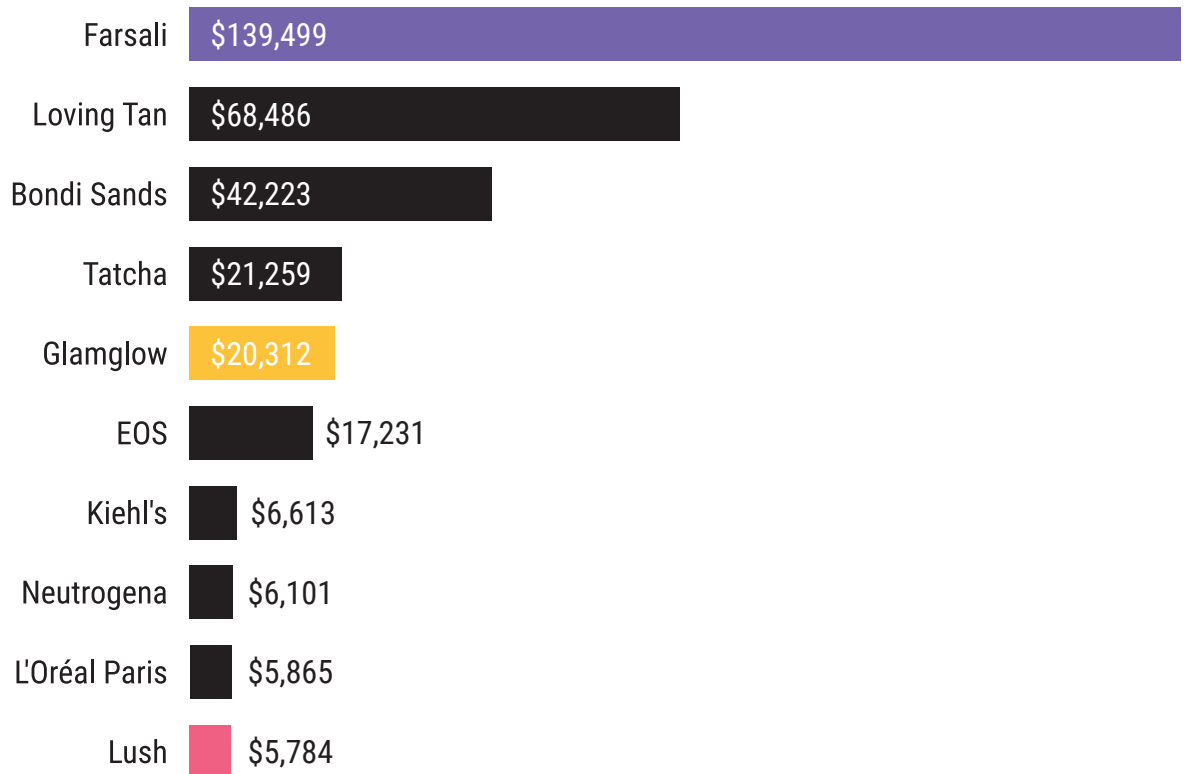
Skincare

EMV Leaderboard Highlights

1. Despite seeing its YoY EMV decline, Lush earned the top spot, just edging out the rapidly-growing Glamglow and Farsali.

2. Glamglow entered the top 10 in Q3, boosted by its #gravitymud and #supermud product campaigns.

3. Bondi Sands, Nivea, and Glamglow entered the top 10, replacing Caudalie, Glossier, and The Body Shop.
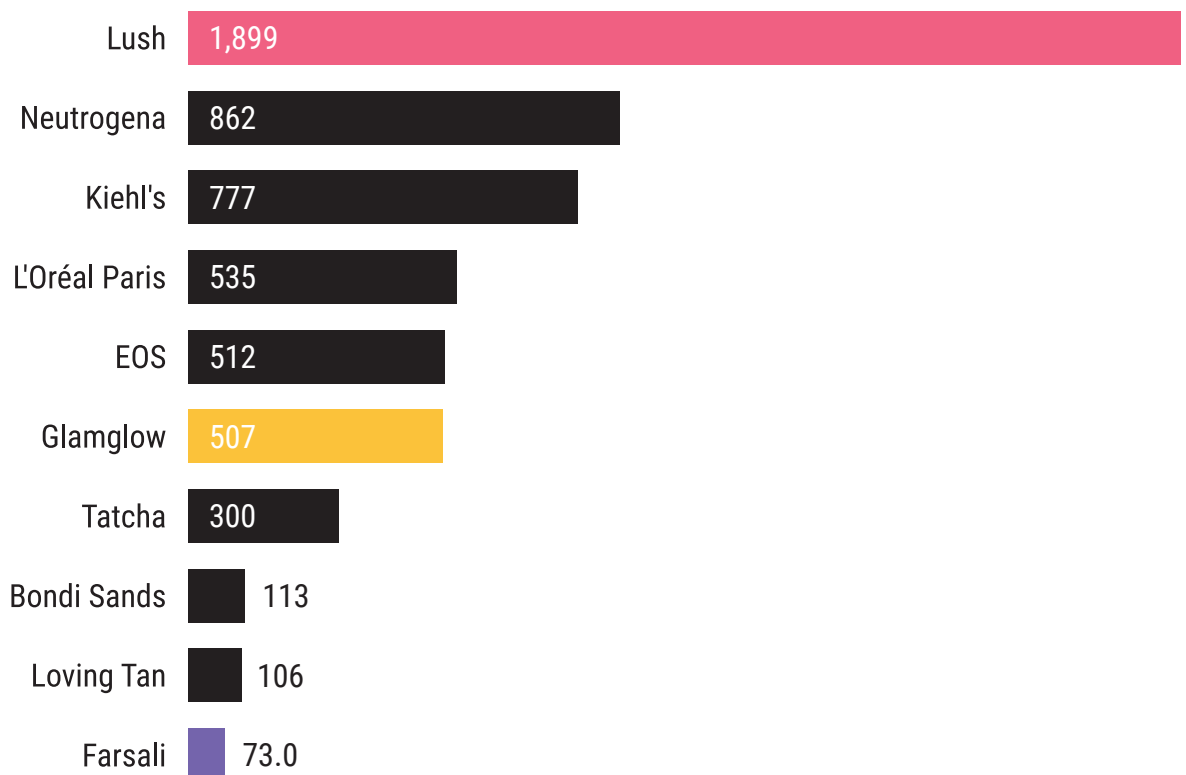
Top 10 Skincare EMV

Brand	Q3 2015	Q3 2016
Lush -26.56% YoY	$14,954,979	$10,983,437
Glamglow 254.13%	$2,907,994	$10,298,089
Farsali 264.07%	$2,797,109	$10,183,454
EOS 90.92%	$4,621,042	$8,822,365
Loving Tan 42.84%	$5,082,214	$7,259,466
Tatcha 130.53%	$2,766,522	$6,377,800
Neutrogena 18.57%	$4,435,423	$5,259,097
Nivea 165.48%	$1,882,104	$4,996,659
Kiehl's 37.30%	$3,499,161	$4,804,509
Bondi Sands 180.76%	$1,699,410	$4,771,216

Q3 2015
Q3 2016

EMV Per Ambassador Posting About A Brand

Brand	EMV
Farsali	$139,499
Loving Tan	$68,486
Bondi Sands	$42,223
Tatcha	$21,259
Glamglow	$20,312
EOS	$17,231
Kiehl's	$6,613
Neutrogena	$6,101
L'Oréal Paris	$5,865
Lush	$5,784

Total Number of Ambassadors

Brand	Ambassadors
Lush	1,899
Neutrogena	862
Kiehl's	777
L'Oréal Paris	535
EOS	512
Glamglow	507
Tatcha	300
Bondi Sands	113
Loving Tan	106
Farsali	73.0

Average Number Of Posts Per Ambassador

Brand	Value
Loving Tan	4.69
Farsali	4.12
Bondi Sands	3.54
Tatcha	3.34
Lush	3.25
Neutrogena	2.90
Kiehl's	2.47
L'Oréal Paris	2.30
EOS	2.27
Glamglow	2.07

● **Farsali**
Despite having only 73 ambassadors in Q3, Farsali led all brands in EMV per ambassador and had the highest overall number of posts, bringing it to third place in EMV rankings.

● **Glamglow**
Despite having the fewest posts per ambassador and moderate EMV per ambassador, Glamglow's 500-plus unique ambassadors were able to bring the brand to second place in overall EMV. Competitors with a larger community than Glamglow earned significantly less EMV for ambassador.
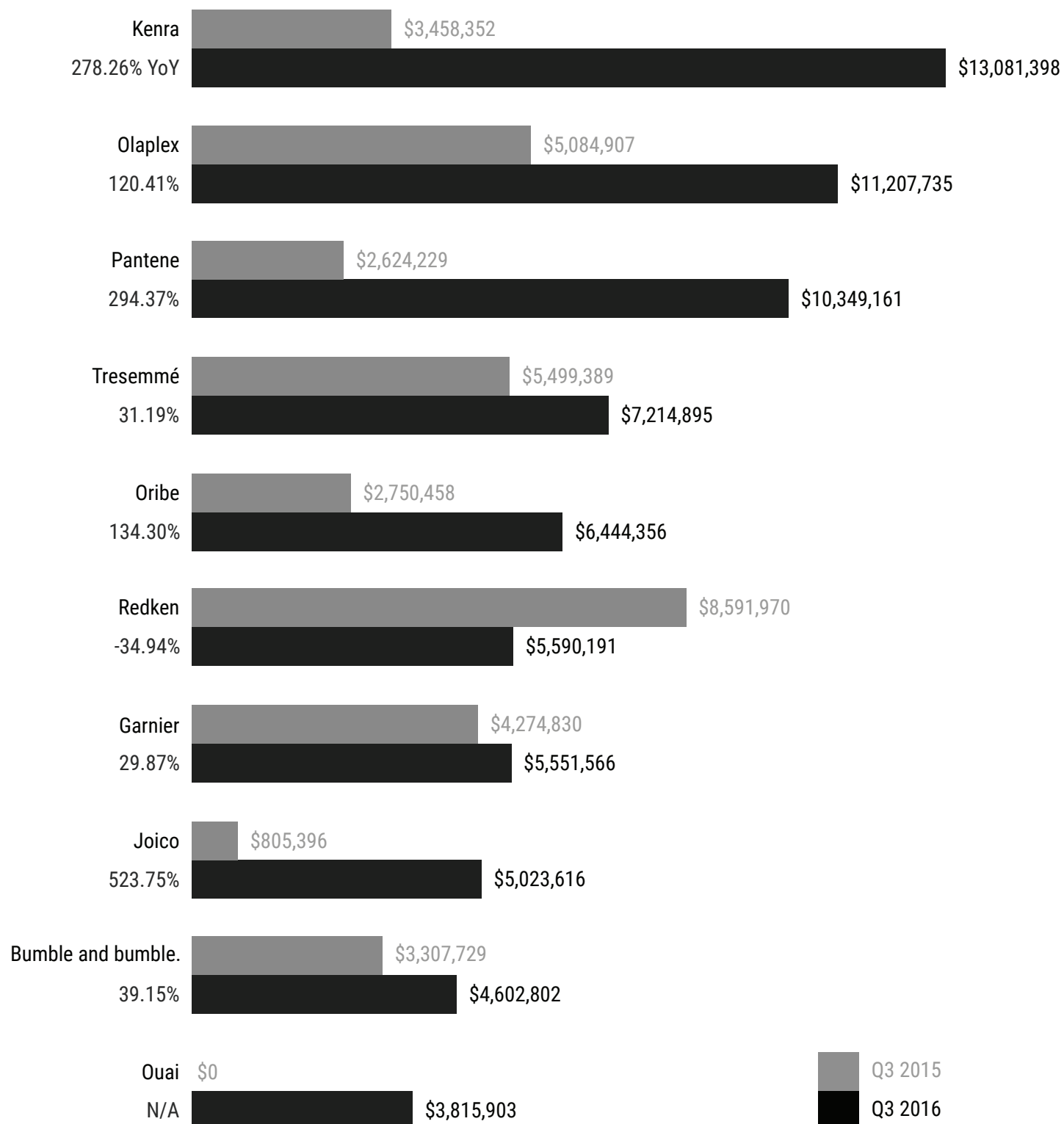
● **Lush**
Similar to MAC in Cosmetics, Lush has significantly more ambassadors than the other brands, but lower posting frequency and engagement.
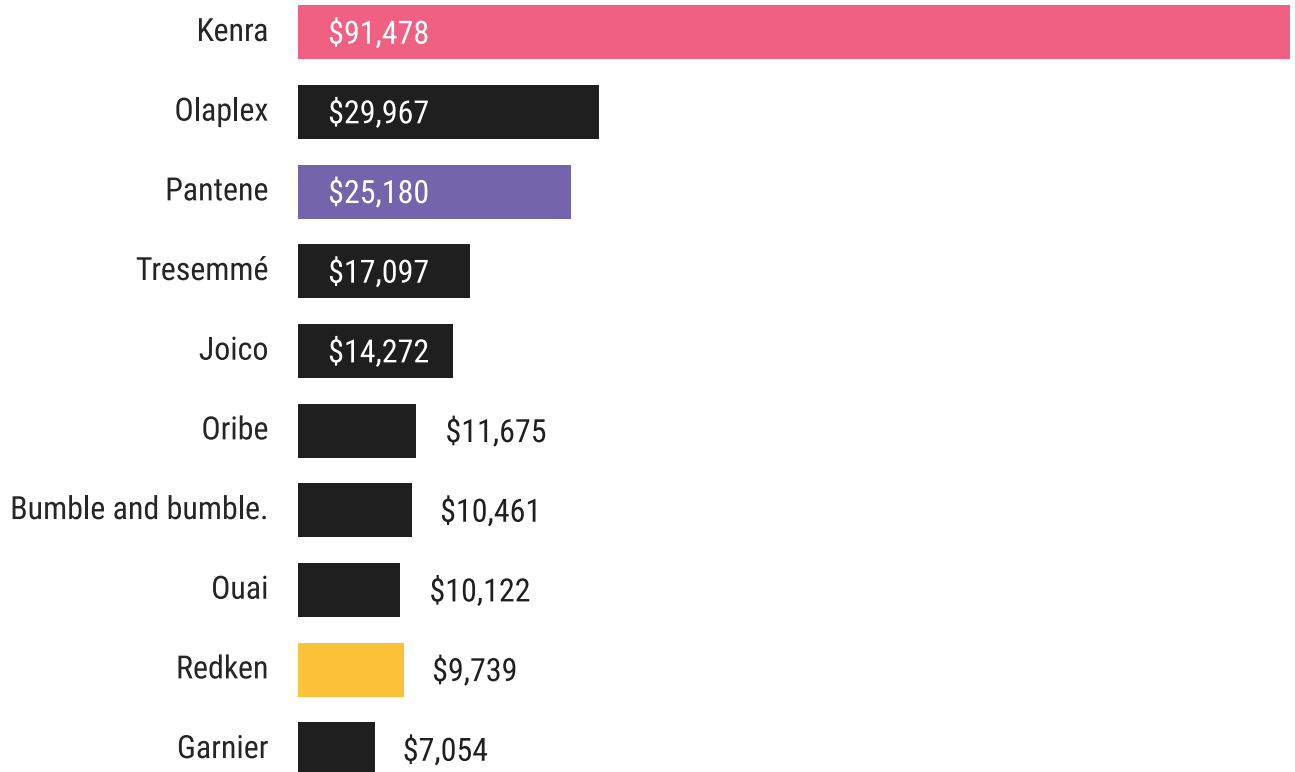
Haircare

EMV Leaderboard Highlights

1. Pantene, whose YoY growth was higher than any other brand, consistently engaged influencers of all ages—from teen YouTubers to It-Girl style bloggers.

2. Olaplex continued to remain a leader in EMV, with loyal content creation by star hairstylist and brand ambassador Guy Tang.

3. Influencer-created brand Ouai, whose products debuted in Q1 2016, was the youngest brand to rank in Q3's top 10.
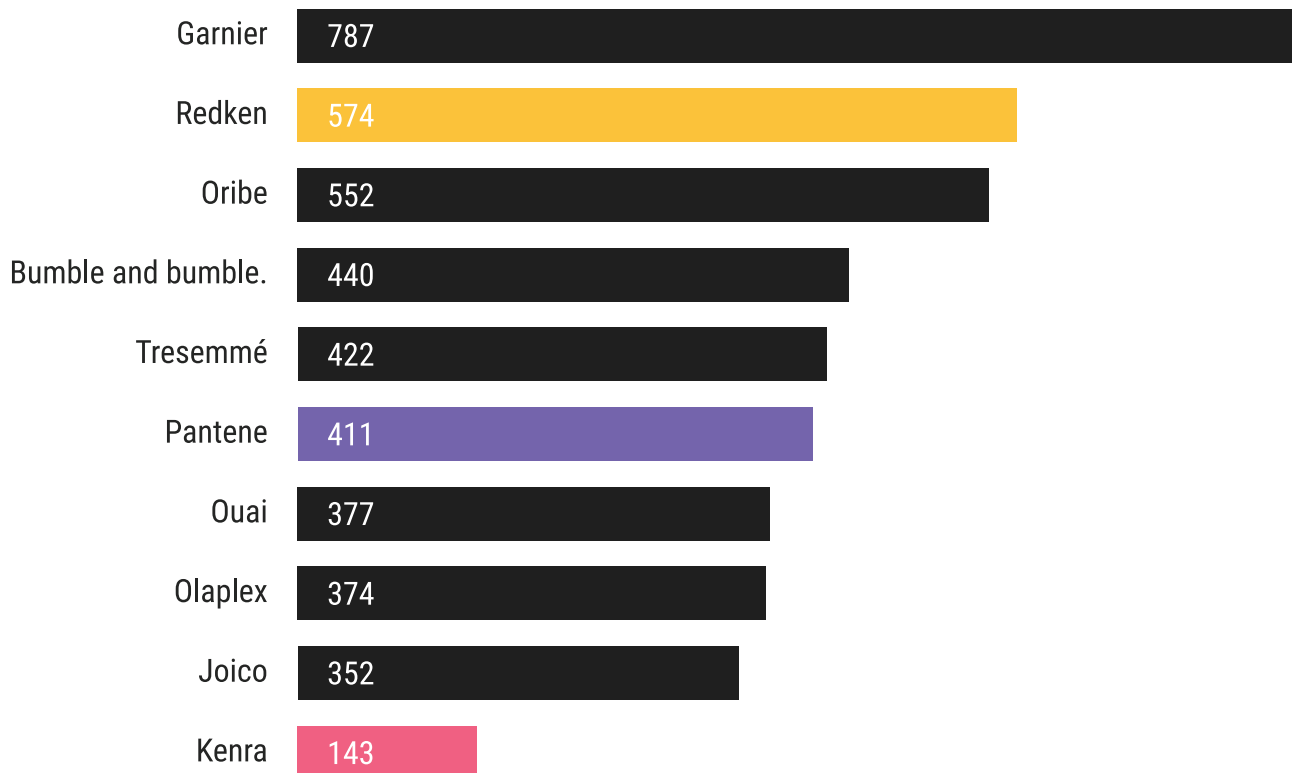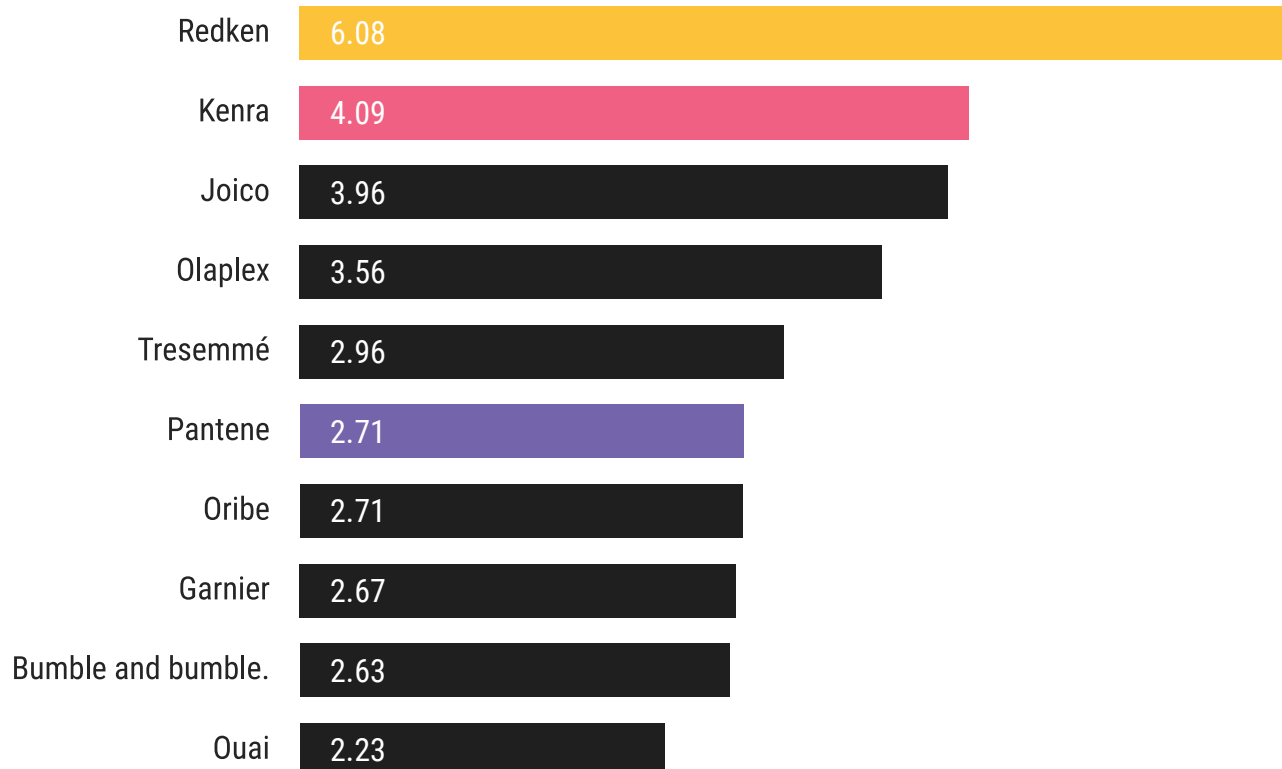
Top 10 Haircare EMV

Kenra
278.26% YoY
$3,458,352
$13,081,398

Olaplex
120.41%
$5,084,907
$11,207,735

Pantene
294.37%
$2,624,229
$10,349,161

Tresemmé
31.19%
$5,499,389
$7,214,895

Oribe
134.30%
$2,750,458
$6,444,356

Redken
-34.94%
$8,591,970
$5,590,191

Garnier
29.87%
$4,274,830
$5,551,566

Joico
523.75%
$805,396
$5,023,616

Bumble and bumble.
39.15%
$3,307,729
$4,602,802

Ouai
N/A
$0
$3,815,903

Q3 2015
Q3 2016

EMV Per Ambassador Posting About A Brand

Brand	EMV
Kenra	$91,478
Olaplex	$29,967
Pantene	$25,180
Tresemmé	$17,097
Joico	$14,272
Oribe	$11,675
Bumble and bumble.	$10,461
Ouai	$10,122
Redken	$9,739
Garnier	$7,054

Total Number of Ambassadors

Brand	Ambassadors
Garnier	787
Redken	574
Oribe	552
Bumble and bumble.	440
Tresemmé	422
Pantene	411
Ouai	377
Olaplex	374
Joico	352
Kenra	143

Average Number Of Posts Per Ambassador

Brand	Value
Redken	6.08
Kenra	4.09
Joico	3.96
Olaplex	3.56
Tresemmé	2.96
Pantene	2.71
Oribe	2.71
Garnier	2.67
Bumble and bumble.	2.63
Ouai	2.23

● **Pantene**
Although Pantene is already a widely recognized brand, its influencers created highly engaging content. Pantene had the third-highest EMV per ambassador, bringing it to third place in overall EMV.

● **Redken**
Despite having the highest amount of posts per ambassador and the second-largest influencer community, Redken's content generated low levels of engagement.

● **Kenra**
While Kenra has the fewest ambassadors, it surpassed all brands in EMV per ambassador. The majority of the brand's overall EMV was attributed to a single influencer.

Part 3: Makeup to 'Ride or Die' for

If there's one phenomenon that embodies the notion of community within beauty's social media landscape, it's the YouTube challenge tag. Whether it's boyfriends doing makeup, or giving yourself a good scare with a highlighter-only look, YouTube tag challenges take the beauty community by storm, as sources of both entertainment and inspiration. In Q3, the "Ride or Die Makeup Tag" caught our eye—for its unique insight into what the makeup community considers really good beauty products.

Luminous Silk Powder, Jaclyn challenged her blogger friends and subscribers to do the same.

With YouTube influencers constantly gifted new makeup to test and review, would "hero" products like NARS Blush in "Orgasm" stand the test of time, or would an indie newcomer take the cake? Would prestige names like MAC and Anastasia Beverly Hills continue to dominate, or would a drugstore brand emerge the victor? For this article, we watched the 15* most-viewed "Ride or Die Makeup Tag"

If you could take only one product from each makeup category to a desert island—to "ride it out" with you—what would you choose?

—Jaclyn Hill

The "Ride or Die" tag was the brainchild of superstar beauty vlogger Jaclyn Hill (3.7M YouTube subscribers), who threw down the gauntlet in August: if you could take only one product from each makeup category to a desert island—to "ride it out" with you—what would you choose? After naming her "ride or die" picks in 16 categories, including Urban Decay's Naked Skin Concealer and the Giorgio Armani

videos by English-speaking bloggers, six of whom were tagged by Jaclyn to take on the challenge (her initial post remains the most-viewed video, with over 2M views.) We then compared their selections across 11 common categories. That makes for over 150** picks by influential, established bloggers ranging from KathleenLights (2.7M subscribers) to Wayne Goss (2.8M subscribers). Here's what we learned:

Jaclyn Hill via Youtube
2.1M Views | 72.4K Likes

I. While prestige brands proved more popular, mass brands got stage time, too.

55 unique brands were represented in our "Ride or Die" data collection. Of the 16 brands whose products were most frequently deemed "ride or die," 12 were prestige (higher-end): MAC came in first with 13 mentions, followed by Too Faced with 10. Four mass brands—Maybelline, CoverGirl, L'Oréal Paris, and Makeup Geek—made the top 16, tying with five prestige brands at either five or four mentions each. That's a noteworthy achievement, considering that prominent YouTubers easily have the means to purchase or receive higher-end makeup products.

Multiple brands had more than one product listed within the same "Ride or Die" category. Of the 11 categories, four had ties for brand "leader"—the brand with the highest total number of mentions within a category—making for a total of 15 category leaders. Of these 15, 12 were prestige brands, while three were mass.

Standouts include Laura Mercier, whose Translucent Loose Setting Powder was included in five ride-or-die roundups, and MAC, whose iconic Lipstick, in the shades "Myth" and "Velvet Teddy," also made five Ride or Die lists.

II. Top "Ride or Die" products weren't necessarily classics.

In line with what we expected, some iconic products, like the NARS Blush, took first place in their respective categories (two influencers chose the shade "Madly," while "Orgasm" and "Exhibit A" got one vote each). But in other categories, drugstore products, as well as newer finds, were favorited as ride-or-dies. Maybelline's Instant Age Rewind Concealer was the top choice for concealer, while the second-place pick, Tarte's Shape Tape Contour Concealer, launched in June 2016, just two months before the challenge commenced.

Influencer-created products also had the chance to shine. Jeffree Star's Velour Liquid Lipstick tied with Kat Von D's Everlasting Liquid Lipstick for top liquid

lipstick, and while Jaclyn Hill unsurprisingly named her collaboration with Becca, the Shimmering Skin Perfector in the shade "Champagne Pop," as her ride-or-die highlighter, two other bloggers, Amy Macedo and Melissa Alatorre, agreed. The ride-or-die popularity of these partner products reinforced the power of the influencer collaboration: an established influencer's thriving network of influencers and followers provides a built-in fan base for their creative business ventures.

III. Top brands represented in the "Ride or Die" roundups were also widely talked about—at large.

To test whether the popularity of leading "Ride or Die" brands extended beyond the challenge, we looked to EMV, Tribe Dynamics' metric for social media engagement. Eight of the top 16 Ride or Die brands also ranked in the top 10 EMV-generating beauty brands for Q3 (July through September of 2016), suggesting that brands with a highly respected product likely boast other hit products, too, and benefit from influencer loyalty in general. (To give some perspective, a single "top" YouTube video can drive about $150K EMV. The average amount of overall EMV driven by a top-10 brand in Q3 was $118.8M EMV.) The brands

mentioned most frequently in top "Ride or Die" lists weren't, by any means, isolated mentions; their products are talked about on social media all the time.

IV. Top "Ride or Die" products proved their worth in EMV, too.

We looked at Q3 EMV figures for Ride or Die products that received at least three mentions—or, given our sample set of 15 influencers, at least 20% of their respective category's votes. None of these products drove less than $3.0M EMV, while more than half drove over $10.0M each. We also checked out the EMV for Tarte's Shape Tape concealer, which received two votes and was the youngest product to make a Ride or Die list. Shape Tape's whopping $19.6M EMV in Q3 warranted its instant "holy-grail" adoption by influencers.

Although we only considered videos from top-tier influencers for this analysis, dozens—even hundreds—of "Ride or Die" videos have been uploaded since the original challenge, by established and aspiring influencers alike. If there's one thing we can conclude about these 15 most-viewed videos, however, it's that they're more than a source of entertainment: their ride-or-die picks— from MAC lipsticks to Maybelline's concealers—give real insight into what's tried-and-true in the beauty world at large.

Top Brands by Total Mentions (across 11 categories)

BRAND	COUNT	MASS/PRESTIGE
MAC	13	Prestige
Too Faced	10	Prestige
Benefit	8	Prestige
NARS	8	Prestige
Tarte	8	Prestige
Becca	6	Prestige
Laura Mercier	6	Prestige
Anastasia Beverly Hills	5	Prestige
Maybelline	5	Mass
Charlotte Tilbury	4	Prestige
CoverGirl	4	Mass
Kat Von D	4	Prestige
L'Oréal Paris	4	Mass
Makeup Geek	4	Mass
Make Up For Ever	4	Prestige
Urban Decay	4	Prestige

Top Brand and Product per Category

CATEGORY	TOP BRANDS	TOTAL COUNT	TOP PRODUCTS (VOTES)
Primer	Too Faced	3	Too Faced Hangover Primer (3)
Foundation	Make Up For Ever	3	Make Up For Ever Ultra HD Stick (2); Revlon Colorstay Foundation (2)
Concealer	Maybelline	3	Maybelline Instant Age Rewind Concealer (3)
Face Powder	Laura Mercier	5	Laura Mercier Translucent Loose Setting Powder (5)
Blush	NARS	4	NARS Blush (4)
Bronzer	Benefit; MAC	3 each	Benefit Hoola Bronzer (2); MAC Mineralize SkinFinish Powder (2)
Highlight	Anastasia Beverly Hills; Becca	3 each	Becca Shimmering Skin Perfector (3)
Mascara	Benefit; L'Oréal Paris	3 each	Benefit Roller Lash Mascara (2); L'Oréal Paris Voluminous Carbon Black Mascara (2); CoverGirl Lashblast Mascara (2)
Lipstick	MAC	5	Lipstick (5)
Liquid Lipstick	Jeffree Star; Kat Von D	2 each	Jeffree Star Velour Liquid Lipstick (2); Kat Von D Everlasting Liquid Lipstick (2)
Eyeshadow	Makeup Geek	4	Makeup Geek Eyeshadows (3)

Top 'Ride or Die' Brands vs. Top EMV-Generating Brands

PRODUCT (VOTES)	Q3 2016 EMV
Too Faced Hangover Primer (3)	$3,079,373
Maybelline Instant Age Rewind Concealer (3)	$3,190,755
Laura Mercier Translucent Loose Setting Powder (5)	$12,245,553
NARS Blush (4)	$5,913,279
MAC Lipstick (5)	$19,933,947
Becca Shimmering Skin Perfector (3)	$17,399,744
Makeup Geek Eyeshadows (3)	$19,502,482

TOP 16 RIDE OR DIE BRANDS	TOP 10 EMV BRANDS FOR Q3 2016
MAC	**Anastasia Beverly Hills**
Too Faced	**MAC**
Benefit	**Benefit**
NARS	**Tarte**
Tarte	**Urban Decay**
Becca	**Too Faced**
Laura Mercier	NYX
Anastasia Beverly Hills	Morphe
Maybelline	**Make Up For Ever**
Charlotte Tilbury	**Maybelline**
CoverGirl	
Kat Von D	
L'Oréal Paris	
Makeup Geek	
Make Up For Ever	
Urban Decay	

*We looked at the 15 most-viewed "Ride or Die" videos as of Sept. 15, 2016, one month from the tag's start date (Aug. 16, 2016).

**We compared 152 product picks, to be exact. Not all of the 15 YouTubers adhered to Hill's 16 makeup categories, so we surveyed ride-or-die selections across the 11 most common categories.

MAC

Goes 'Beyond' with Cultural Icon Collections

In Q3, MAC dazzled users with three popular collaborations: a 25-piece, space-hued Star Trek line; a collaboration with "Empire" star Taraji P. Hensen; and the long-awaited Selena collection, dedicated to the late Latina popstar. Buzz surrounding these fan-favorite projects helped MAC post a quarterly total of $137.2M EMV, a 40% increase over its Q2 EMV of $98.0M EMV. In addition, the total number of posts mentioning MAC in Q3 experienced a quarter-over-quarter growth of 19%.

MAC kicked off September by releasing the Star Trek collection, in time for the show's 50th anniversary and the silver screen premiere of "Star Trek Beyond." The brand designed the collection, which includes frosted nail polish and spiky blue lashes, to honor the franchise's many unique and stylish women. MAC then tapped beauty vlogger Chrisspy to create and film tutorials of makeup looks for Star Trek characters Deanna Troi, Uhura, Seven of Nine, and Vina. In her August video "Dreams Come True: My Collab w/ MAC Cosmetics," Chrisspy alternately expressed humility, disbelief, pride, and gratitude for being granted the opportunity to work with a brand that she considered "the leader in terms of makeup artistry."

Chrisspy admitted her surprise at having been chosen by MAC, which she hadn't known to frequently work with "the influencer community." Her confidence was fortified, however, when the brand encouraged her to "run with it," "be creative," and "be yourself." By respecting her talents as an artist and granting her creative freedom in the collaboration, MAC helped validate Chrisspy's years of hard work as a beauty vlogger, ensuring further loyalty and the creation of authentic, compelling content on her part. The influencer drove $851.8K EMV for the brand in Q3, while the hashtag #macstartrek generated $815.2K.

A week after the Star Trek collection debuted, MAC released its six-piece collaboration with Taraji P. Henson, star of the musical drama "Empire." Though the collection centered on the Emmy award-nominated actress, MAC incorporated both influencers—including ellarie, ownbyfemme, and thegalsguide—and their followers by inviting the bloggers to host launches at various MAC stores across the US. Influencers also received the collection itself and a handwritten note by Henson, encouraging them to show "how [they] wear these beautiful, bronzy products" with the tag

Chrisspy via Instagram
23.5K Likes | 367 Comments
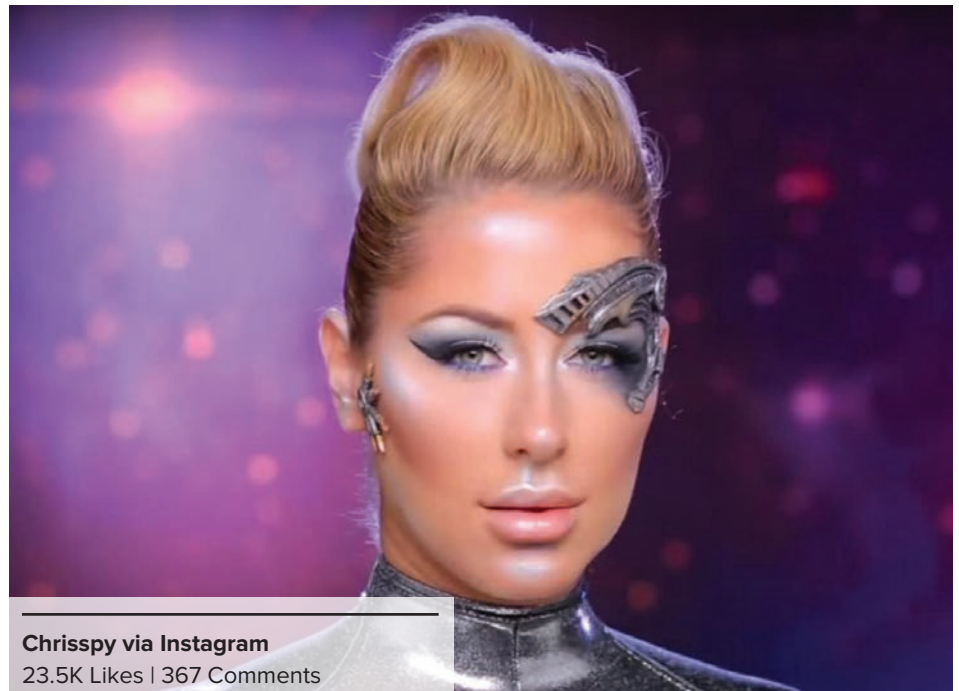
#mactaraji ($2.0M EMV). The actress expressed her appreciation by reposting #mactaraji photos, driving $1.2M EMV for the brand in Q3. Items from the collection sold out so quickly, Henson reported that her own mother was not able to purchase them.

MAC closed a fruitful quarter by premiering its long-awaited Selena collection, in honor of the late popstar. The line, the brainchild of radio producer and jewelry designer Patty Rodriguez, drew praise for focusing on Latina women. Rodriguez had contacted MAC about the collection as far back as 2013, eventually amassing nearly 37,000 petition signatures. The brand showed its propensity to listen to its fans when it announced the collection two years later. The 14-piece set—including eyeshadows, three lipsticks, and blush and powder compacts, all packaged in a vibrant purple—was curated by Selena's sister, Suzette Quintanilla, who had sent photos of the singer's makeup case contents to MAC. The brand used the photos to create the specific shades and products, naming them after Selena's most popular songs.

MAC sent the complete collection to influencers in a striking purple box lined with white roses, touching many of the singer's fans. Beauty vlogger Desi Perkins filmed an emotional "Selena Quintanilla Makeup Transformation" video and tribute, preluding her tutorial with inspirational clips of the singer. After completing the transformation, the vlogger revealed, "I have looked up to Selena my whole life. When I finished this video…I almost wanted to start crying. She's such a strong Latina. She's so inspiring in so many ways." This personal connection to the singer was echoed by influencer Dulce Candy: "I love Selena so much, and I still remember the day that I got the news that she passed away. I was seven years old… and it was such a big shock." The influencer called the collection "one of [Selena's] dreams that came to reality."

Following the product send, MAC invited established content creators Manny Mua, itsmyrayeraye, and viva_glam_kay to the brand's "Selena World Premiere"
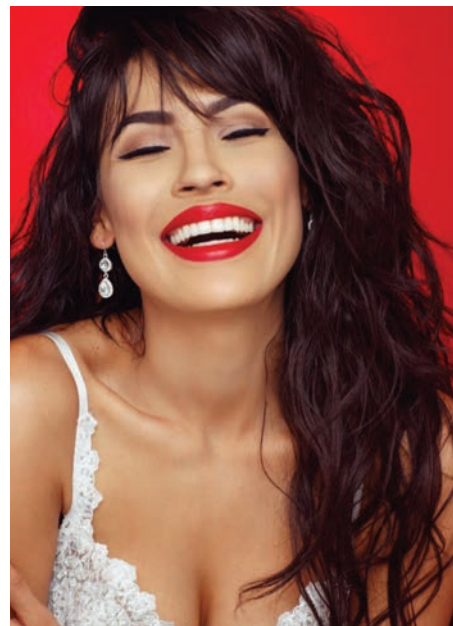
"I have looked up to Selena my whole life. When I finished this video…I almost wanted to start crying."

—Desi Perkins

in Corpus Christi, Texas, where the late singer had resided. The event featured live DJs and guest performer Prince Royce, a special presentation by the Quintanilla family, interactive social media screens, larger-than-life Selena displays, and the Queen of Tejano's music, played on a continuous loop. The extravaganza drew a crowd of 15,000 from all over the country, and attendees were granted the opportunity to purchase the collection prior to its official October 1 launch. Itsmyrayeraye Instagrammed a picture with Suzette Quintanilla, disclosing that she had "cried like a big old baby" upon meeting the singer's sister and "felt like Selena's spirit was there." In total, posts mentioning the now sold-out Selena collection generated $2.3M EMV.

Makeup Geek

Highlights Inclusiveness with KathleenLights Collab

Makeup Geek, which drove a total of $72.8M EMV in Q3, launched a limited-edition highlighter palette in collaboration with top YouTuber and loyal brand supporter KathleenLights in August. Kathleen introduced the palette in an ecstatic video on her channel, detailing the packaging, the shades, and her favorite way to use each of the three shades.

Given Kathleen's consistent incorporation of Makeup Geek products into her past content, the collaboration recognizes Kathleen's preexisting support of the brand, and demonstrates Makeup

Geek." Marlena Stell, the company founder, was the first beauty YouTuber whom she had ever subscribed to.

Kathleen also shared how much her followers' opinions mattered in the palette's development. Namely, she chose to include a deeper highlight color in the trio based on their comments: "I always hear my subscribers with deeper skintones say they can never find highlights that work for them. I wanted to create a color that would work for them because light skin is not the only skin color in the world." After questions arose of whether

> ## *"I just really love the people behind Makeup Geek."*
>
> —KathleenLights

Geek's commitment to its influencer family. In her video, Kathleen, who earned a total of $6.4M EMV in Q3 for Makeup Geek, freely expressed her love for the brand: "I just really love the people behind Makeup

the shades were genuinely wearable on both light and darker skin tones, Kathleen featured several photos of her friends and followers, of varying complexions, wearing the various highlight shades.

KathleenLights via Youtube
550.1K Views | 28.4K Likes

When some paler followers worried whether the overall palette was better suited to medium-to-deep skin tones, fair-skinned beauty bloggers like Mariah Leonard stepped up to enthusiastically endorse the palette.

These well-intentioned posts perpetuated the narrative of diversity that Kathleen established in her introduction video, and oriented conversation around the Makeup Geek brand to one of inclusiveness as well. By giving Kathleen the freedom to create shades for a wide range of skin tones, Makeup Geek reinforced this collaboration as an opportunity for Kathleen to maintain a sincere commitment to her subscribers' makeup needs. The brand showed that it not only regards Kathleen as a true co-creator, but genuinely values her millions of supporters. Kathleen ended her own video by thanking her followers for "making my dreams a reality, for being my best friends, and for being my support system."

For the collaboration's launch, Kathleen and Makeup Geek hosted an intimate, celebratory dinner in LA for several of Kathleen's fellow beauty and lifestyle influencer friends, including Manny Mua, BeautyyBird, and WhatWouldLizzyDo. The dinner featured a Makeup Geek photo booth, bright floral arrangements, and a signature champagne cocktail called "The Highlighter." In her video reviewing the palette, WhatWouldLizzyDo thanked both Kathleen and Makeup Geek for inviting her to take part in such a stunning evening. The intimate nature of the launch dinner, coupled with the focus on the collaboration, helped Makeup Geek strengthen the relationships within its entire influencer family.

In light of Kathleen's prominence in the YouTube beauty community and her thriving network of influencer friends, the palette made continuous appearances in countless other influencer-created posts, from single-product spotlight reviews and makeup tutorials to monthly-favorites roundups. Jeffreestar used the palette in a video tutorial, shrieking from excitement as he zoomed in on his beaming cheekbone. Another influencer friend, Casey Holmes, included the palette in her August "Favorites" video, touting both the palette's formula and shades. Not only did Makeup Geek's Q3 total of $72.8M EMV represent a quarter-over-quarter growth of 60% percent, it also experienced a significant rise in the number of unique influencers posting about the brand: from just under 500 ambassadors in June to over 600 in September.

Glamglow

Powers Super Growth with #SuperMud

In Q3, Glamglow rose to second place on the list of top EMV-generating skincare brands with $10.0M EMV. The brand continued promoting its Pantone-blue, Sonic the Hedgehog-themed version of the GravityMud Firming Treatment Mask, giving away samples at July's San Diego Comic-Con, where recipients had the opportunity to meet Glamglow founders Shannon and Glenn Dellimore. Thanks to these efforts, #gravitymud remained a popular hashtag, yielding $876.0K EMV across a wide variety of posts. In August, Glamglow mobilized its corps of influencers to post content about the brand's staple SuperMud Clearing Treatment Mask, united by the #supermud hashtag.

Different influencers contributed to the #supermud and #gravitymud campaigns, demonstrating Glamglow's wide reach and general popularity. Instead of soliciting previous contributors like grav3yardgirl, jeffreestar, and NikkieTutorials for #supermud, the brand diversified by engaging other popular content creators. Glamglow enlisted nicolconcilio (1.0M Instagram followers), who posted an Instagram captioned, "My favorite mask to bring when I travel is the @glamglow #supermud! It really makes my skin feel refreshed and glamorous." Meanwhile, nathalieparis shared a snapshot of herself rocking the mask, explaining that "it helps me feel more confident without makeup." Jackieaina, who uploaded a video of herself using the product, wrote, "Love how I can see it working as it dries! Leaves me with an instant glow and makes my skin feel BEYOND soft."

Posts in the #supermud campaign were tagged #ad, which can limit the authenticity and efficacy of influencer endorsements. However, by utilizing a broad sample of influencers and seeding varied, detailed posts, Glamglow steered clear of potential pitfalls inherent to sponsored content. #Supermud paid off for the brand, yielding $573.9K EMV over the course of the quarter. In addition, Glamglow's average EMV per post grew from $2.7K EMV in May to $11.3K in September, reflecting increased engagement from followers with posts featuring Glamglow products—a likely result of the brand targeting popular influencers with large followings.

"Loving my @Glamglow #SUPERMUD mask—it helps me feel more confident without makeup! "

—nathalieparis

nathalieparis via Instagram
43.5K Likes | 1.7K Comments

Rising Star: Derma E
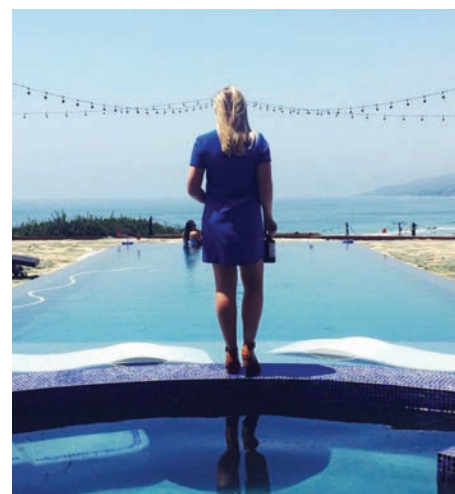
Pampers Influencers with Zen Beach Retreat

ydelays via Instagram
3.9K Likes | 20 Comments

Derma E's Q3 total of $1.4M EMV, a growth of 49% over its Q2 2016 EMV of $942.3K EMV, was heavily strengthened by its hit influencer getaway event, #zeninthebu. The natural skincare brand treated several up-and-coming influencers to a July retreat in Malibu, California, where the diverse squad of beauty and style bloggers enjoyed facials, massages, yoga, and paddleboarding. Influencers posted photos of themselves enjoying the sunshine and basking in the sunset, tagging Instagrams of their "zen" adventures with #zeninthebu. In addition, the location of the retreat itself—a stunning beachfront estate, complete with an infinity pool and posh, white interiors—provided influencers with instant, and endless, photo ops. Yeshipolito and lyciafaith shared Instagrams of themselves lounging on wicker sofas with Derma E pillows, while thepennycloset_ referred to the house as "interior goals."

#Zeninthebu proved successful in more ways than one. The retreat's indulgent locale and "treat yourself" activities refined Derma E's brand personality, associating the natural skincare brand with leisure and luxury. The event also demonstrated Derma E's genuine appreciation for the brand's loyal influencers, and gave attendees the opportunity to begin building a Derma E community. Aspiring influencer Roxette Arisa (14.4K Instagram followers), who had raved on YouTube about Derma E products in April, attended #zeninthebu and left wholly reenergized. She posted four Instagrams featuring the "amazing" event, for a combined $15.7K EMV. Beauty blogger Photoallison shared six Instagrams ($54.2K EMV) of her time in Malibu, thanking Derma E for "a great experience" at a "GORGEOUS" estate.

None of the posts that influencers created at #zeninthebu explicitly featured Derma E products, making the entire event appear more authentic than promotional. #Zeninthebu generated a total of $450.9K EMV for Derma E, a sizeable 32% of the rising brand's Q3 EMV. In addition, ambassadors posting about Derma E in July drove an average of $5.1K EMV each, a record high for the brand.

TRIBE DYNAMICS