

Photo credit // keyssoulcare.com

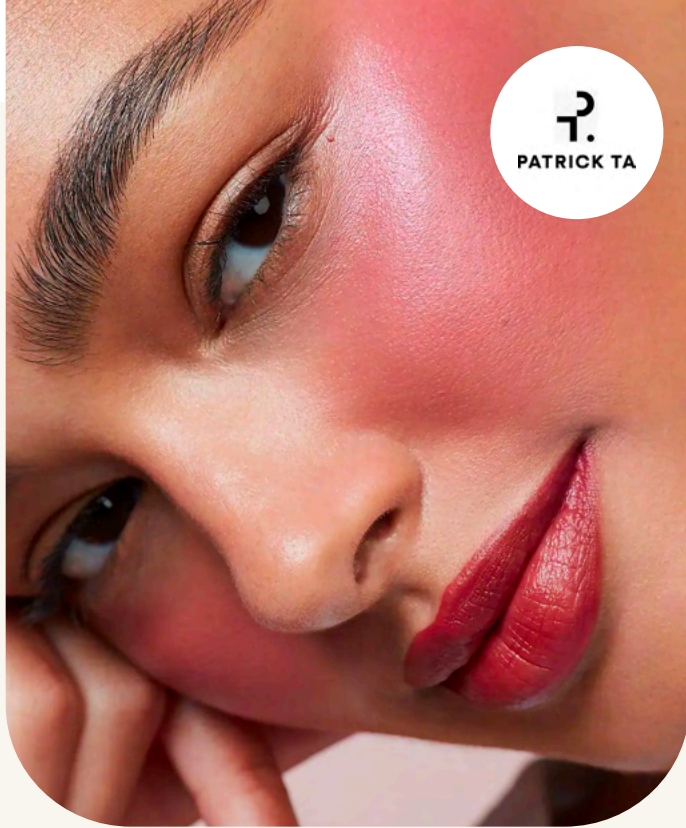
Q3  
2023

# Indie Beauty Debrief

Tribe Dynamics' quarterly Indie Beauty Debrief, which debuted in 2019, showcases noteworthy independent beauty brands across cosmetics, skincare, haircare, and EMEA. The report offers exclusive, data-backed insights into up-and-coming brands, their online communities, and their top-performing earned content.

Tribe Dynamics  
A CreatorIQ Company 

Celebrity-owned beauty  
brands captivated consumers.



## Introduction

# A Roundup of the Latest Indie Beauty Sensations

Indie beauty brands enjoyed an eventful Q3. Celebrity-beauty brands lived up to the hype, with viral strawberry looks from Hailey Bieber's RHODE Skin (accentuated, of course, by Justin Bieber in sweats). Meanwhile, Alicia found the Keys to our hearts, with the musician's Keys Soulcare getting a healthy boost via a multi-touch IPSY partnership.

Keys Soulcare wasn't the only brand to be boosted by IPSY subscription boxes. #GiftedByIpsy was also a popular tag for cruelty-free beauty brand Lottie London. Creators indulged in IPSY-approved vibrant eyeshadow palettes, while fake freckles went vogue via the popular Freckle Tint.

What Indie Beauty Debrief is complete without a Lindsey Rowley (@linsmakeuplooks on TikTok) mention? The makeup enthusiast ranked as the most impactful creator for multiple brands, including Patrick Ta Beauty.

Over in the U.K., Clarins kicked innovation up a notch by going cryo via its cryogenic technology mask. Its cult favorite lip oil had us at the edges of our seats, amassing \$1.8M EMV.

Curly hair did it again, empowering brands like Bounce Curl to thrive. Kaleidoscope Hair Products benefited from both the back-to-school season and natural hair care.





It's the moment we've all been waiting for—let's dive into the Q3 2023 Indie Beauty Debrief!

## EMV








# Introduction to Earned Media Value

Earned Media Value, or EMV, quantifies 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 platform it was published on and 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.







### Posts by

-  Influencers
-  Brands
-  Retailers
-  Publications

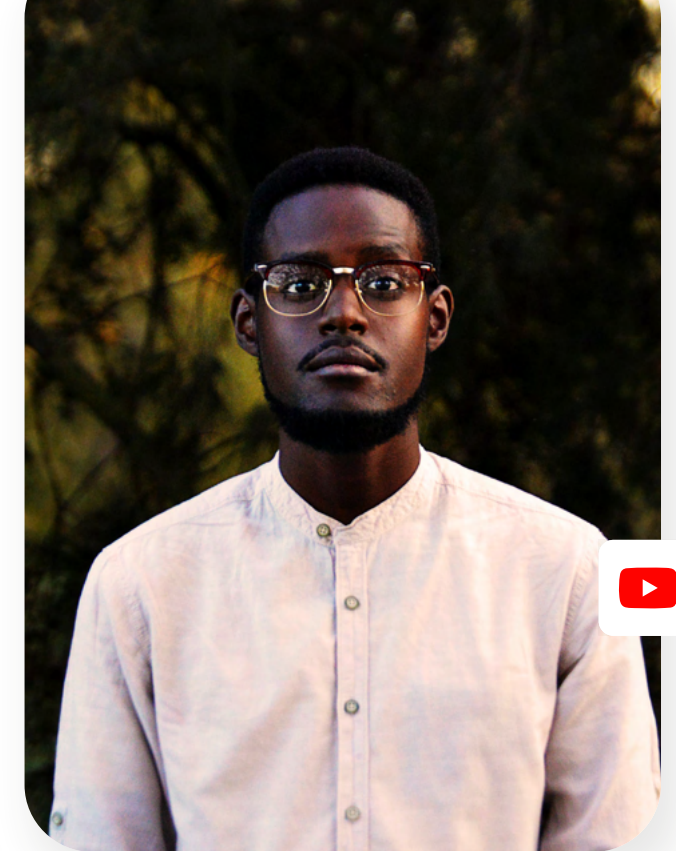
### Platforms including

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

### Engagement via

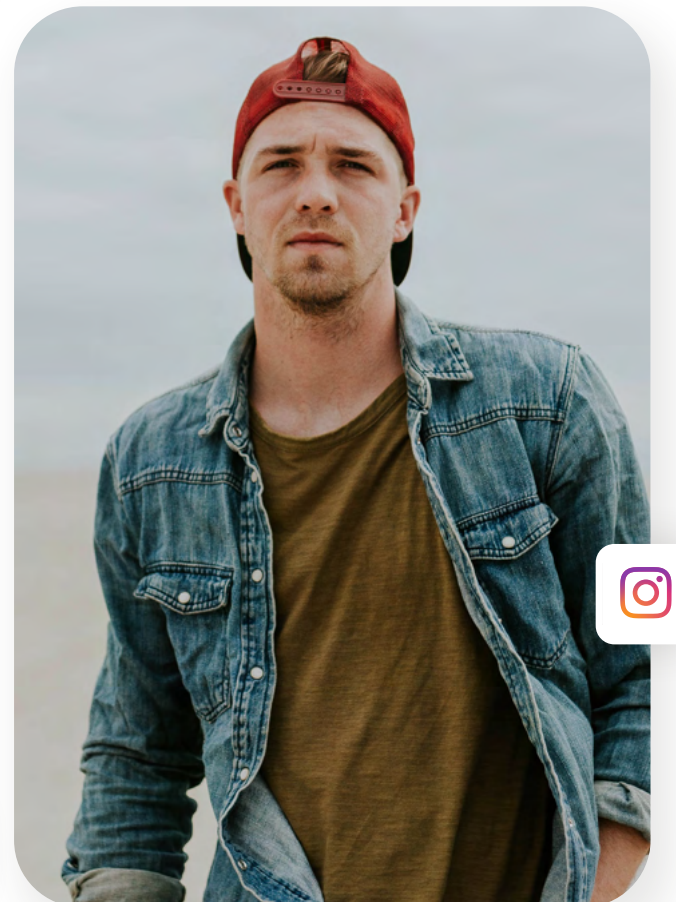
-  Comments
-  Tweets/Retweets
-  Favorites
-  Likes
-  Pins/Repins
-  Shares
-  Video Views

12.3k Followers 23.6k EMV



66.4k Followers 14.9k EMV

3.2M Followers \$1.7M EMV



120.0M Followers \$23.8M EMV



Cosmetics

# Patrick Ta Beauty Makes Major Headlines

Securing \$30.9M EMV, **Patrick Ta Beauty** enjoyed a successful Q3, improving its EMV by 55%. Founded by celebrity makeup artist Patrick Ta, the brand prides itself on boosting the confidence of those who wear it. In Q3, Patrick Ta Beauty certainly achieved its aim, boasting 260.0M impressions, up 40% QoQ. This uptick is in part due to makeup enthusiast Lindsey Rowley (@linsmakeuplooks on TikTok), who served as the brand's No. 1 EMV-driver, netting \$4.7M via 70 posts. Lindsey's EMV contributions amount to \$4.0M more than Patrick Ta Beauty's No. 2 EMV-driver. Additionally, Patrick Ta Beauty dropped new shades of its Major Headlines collection, which generated \$2.6M EMV via 302 creators. Creator partner Spencer (@paintedbyspencer) shared the new blush shades, driving \$708.5k EMV, up 185% from his contribution previous quarter.

## Patrick Ta Beauty

2023 Q3 Highlights



**\$30.9M**  
Total EMV in Q3

**55%**  
QoQ

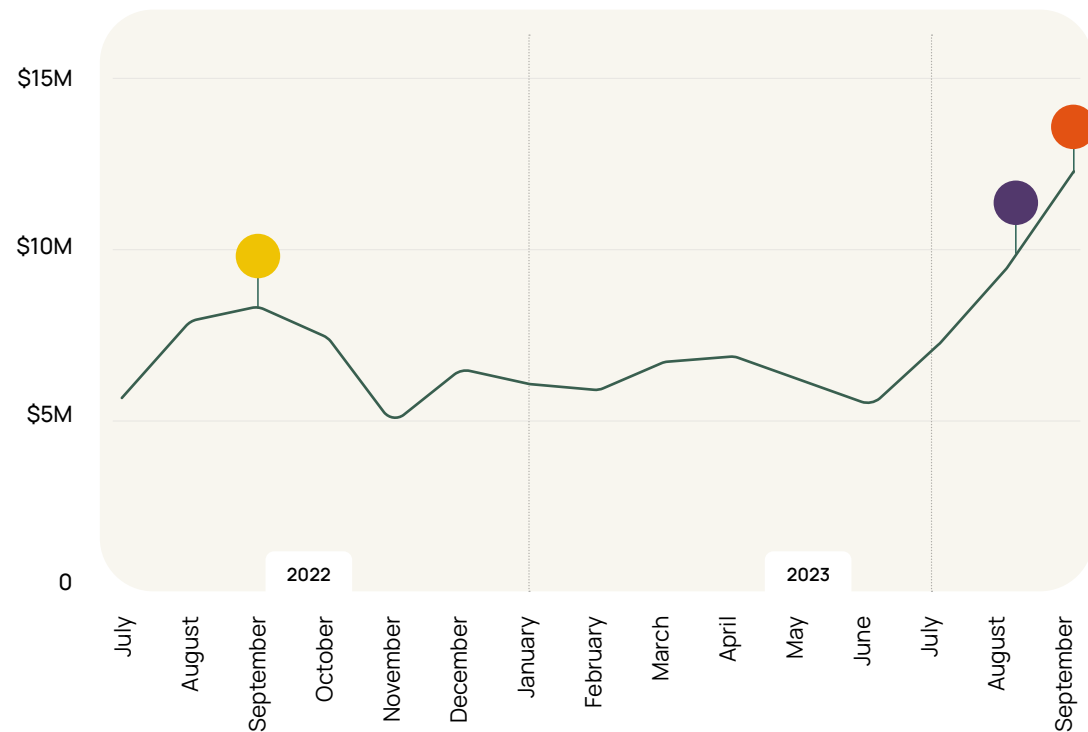
**2.5k**  
Creators

**7.6k**  
Posts

**\$12.6k**  
EMV  
per Creator

**3.1**  
Posts  
per Creator

### Monthly EMV Jul 2022 - Sep 2023



Sep 22



Patrick Ta Beauty relishes in a post volume of 5.1k, up 31% MoM.

Aug 23

Patrick Ta Beauty releases an expanded shade range of the Major Headlines blush, inspiring \$939.0k EMV.

Sep 23

Lindsey Rowley (@linsmakeuplooks) collects \$2.8M EMV for Patrick Ta, incorporating the brand's products into 44 eclectic looks.

Cosmetics

# Lottie London Woos Fans With Freckles

**Lottie London** claimed a 61% quarter-over-quarter improvement—no small feat in a quarter when many beauty brands stagnated. The brand's \$9.6M EMV stemmed from various initiatives, from an IPSY Glam Bag inclusion to the success of multiple products. #GiftedByIpsy gained traction in August, collecting \$519.9k EMV in that month and \$910.2k for the quarter overall. The Freckle Tint, which helps consumers achieve a summer-like aesthetic by adding freckles to their faces, inspired \$628.0k EMV. Meanwhile, the Superfake Mascara secured \$574.0k EMV via 58 creators. Micro-influencer Hannah Mackenzie (@cherryantacidsx on Instagram) stood out as the brand's most impactful advocate, contributing \$332.5k EMV via Halloween looks and matte/chrome combos.

**Lottie London**  
2023 Q3 Highlights



**\$9.6M**  
Total EMV in Q3

**61%**  
QoQ

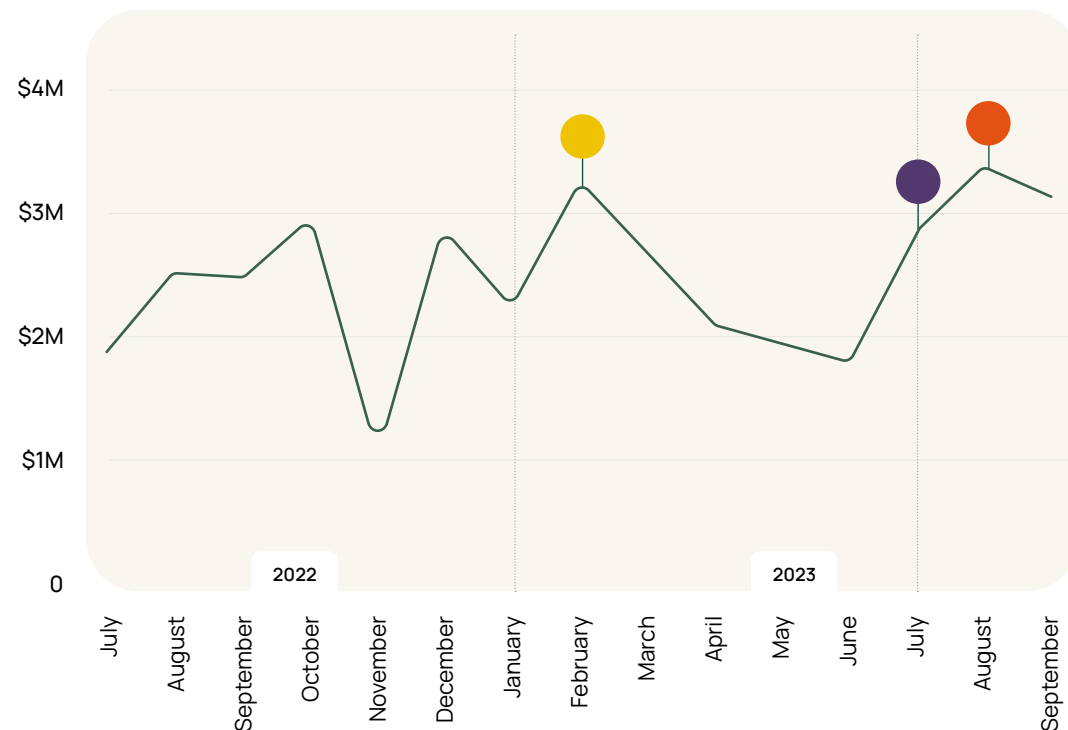
**1.3k**  
Creators

**4.0k**  
Posts

**\$7.3k**  
EMV  
per Creator

**3.0**  
Posts  
per Creator

Monthly EMV Jul 2022 - Sep 2023



Feb 23



Lottie London launches a lip and cheek stick, inspiring \$3.3M EMV. The brand donated proceeds to a U.K.-based wellness charity.

Jul 23



Lottie London grows its post count by 72% MoM, achieving a content volume of 1.2k.

Aug 23



Lottie London powers \$3.5M EMV—its highest in the time period monitored—thanks to a spot in IPSY's Glam Bag.

Skincare

# RHODE Skin Revives Strawberry Look

Celebrity beauty brand **RHODE Skin** crushed Q3, racking up \$36.5M EMV, a 132% improvement from the previous quarter. Various efforts contributed to the brand's success, including the popularity of its Peptide Lip Treatment. The restorative and glossy lip treatment collected \$6.1M EMV via 477 creators. RHODE Skin also benefited from a strawberry craze: #StrawberryMakeup accrued \$1.5M EMV, the bulk of which was accrued in August. That's when the Strawberry Glaze flavor of the Peptide Lip Treatment dropped, building on Hailey Bieber's viral strawberry makeup look. Bieber (@haileybieber on Instagram) declared it a "Strawberry Girl Summer," while Justin Bieber (@justinbieber)—dressed in sweats despite Hailey Bieber's red dress—captured the duo at Krispy Kreme, who offered strawberry-glazed donuts (\$228.2k EMV).

RHODE Skin  
2023 Q3 Highlights



**\$36.5M**  
Total EMV in Q3

**132%**  
QoQ

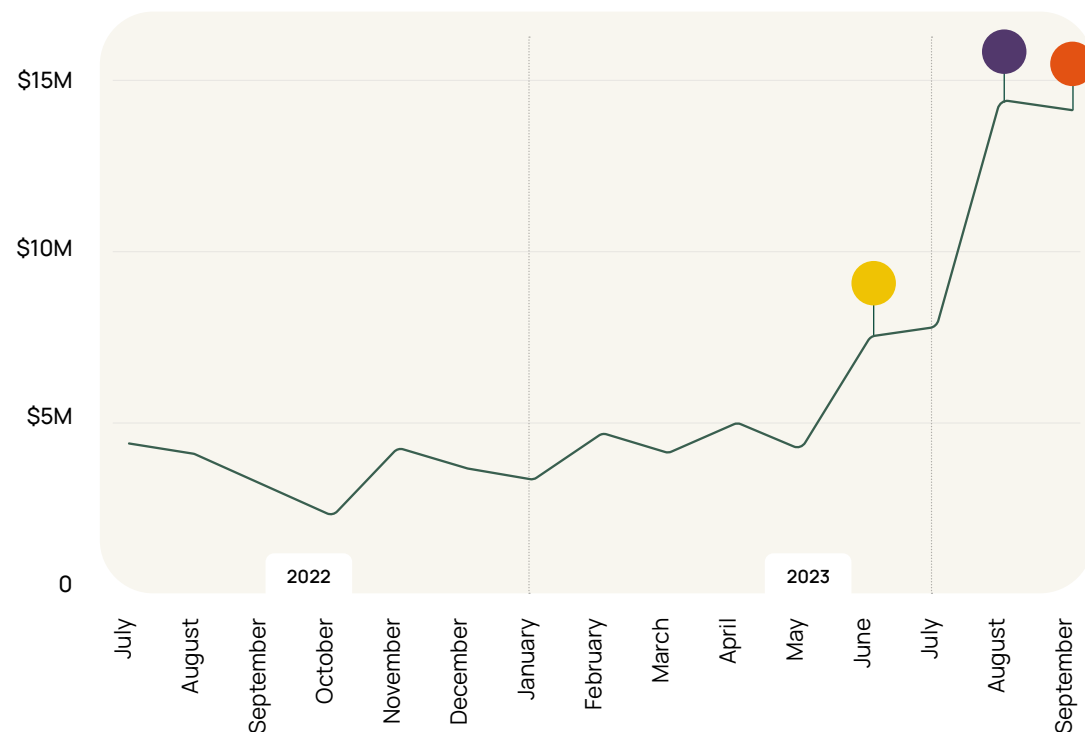
**2.9k**  
Creators

**10.4k**  
Posts

**\$12.8k**  
EMV  
per Creator

**3.6**  
Posts  
per Creator

Monthly EMV Jul 2022 - Sep 2023



Jun 23



RHODE Skin drops the Glazing Milk essence, inspiring \$7.3M EMV, up 89% month-over-month.

Aug 23



RHODE Skin generates \$14.6M EMV, its highest total in the time period monitored, thanks in part to #StrawberryMakeup (\$1.1M EMV).

Sep 23



RHODE Skin announces the Peptide Lip Tint, a remix on its crowd-favorite peptide product. The new offering powers \$1.1M EMV.

Skincare

# Keys Soulcare Boosted by IPSY

Dermatologist-approved **Keys Soulcare** secured an impressive 162% QoQ EMV surge. Closing Q3 with \$4.3M EMV, the clean skincare brand expanded its creator community by 145%. These 1.0k creators flocked to Keys Soulcare in large part due to its partnership with Beauty icon IPSY: Q3's most impactful hashtag for Keys Soulcare was #GiftedByIpsy (\$965.3k EMV), while #IpsyPartner (\$422.7k) outperformed Keys Soulcare's own partnership tag #KeysSoulcarePartner (\$298.4k). Inclusion in IPSY's subscription box led to a swell of creators who hadn't posted about Keys Soulcare before, with these incoming creators fueling 81% of the brand's quarterly EMV. Creator Jalen Noble (@jalen\_noble), for example, shared a post from a Keys Soulcare event featuring big life moves (\$144.0k EMV). Meanwhile, Lana (@lanayanette) included the brand in a Zenon-inspired makeup look (\$195.7k EMV).

Keys Soulcare

2023 Q3 Highlights



**\$4.3M**  
Total EMV in Q3

**162%**  
QoQ

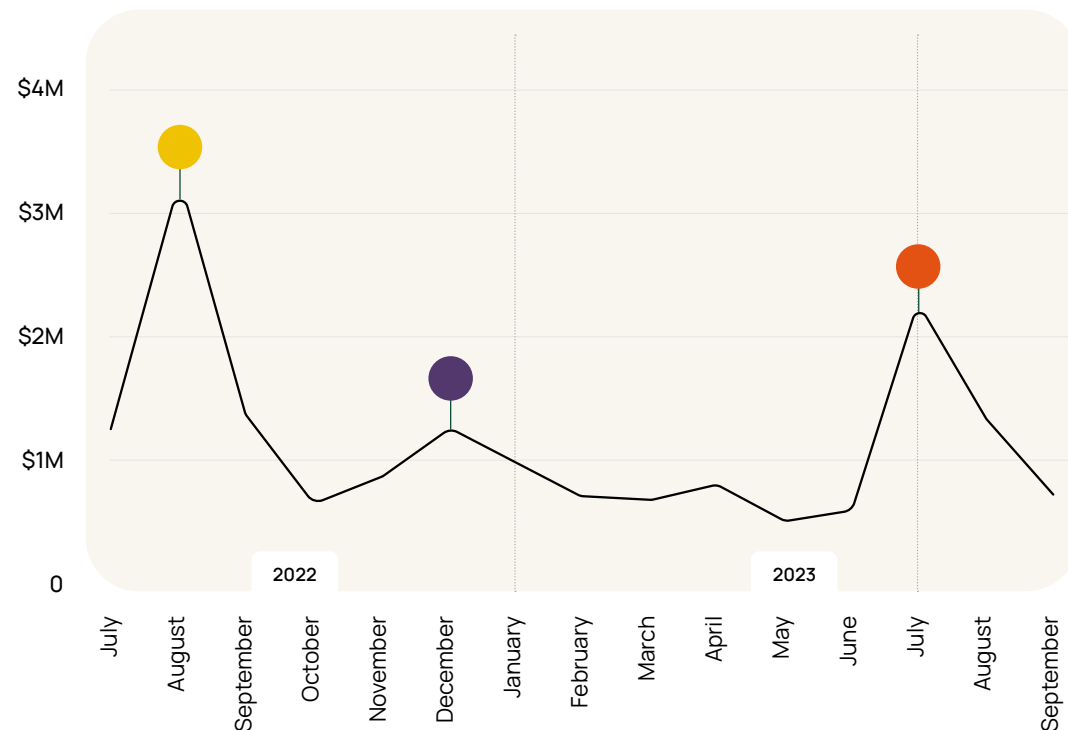
**1.0k**  
Creators

**1.9k**  
Posts

**\$4.3k**  
EMV  
per Creator

**1.9**  
Posts  
per Creator

## Monthly EMV Jul 2022 - Sep 2023



Aug 22



IPSY Glam Bag X Alicia Keys powers \$3.4M EMV, as fans await the luxury items the iconic musician curated for them.

Dec 22



Keys Soulcare's post volume reaches 671, up an impressive 79% MoM.

Jul 23



Keys Soulcare benefits from an IPSY subscription box inclusion, with #GiftedByIpsy inspiring \$693.3k EMV.



Haircare

# Bounce Curl Brush Proves a Fan Favorite

Aptly-named **Bounce Curl** closed Q3 with \$5.5M EMV. The brand, which makes use of “traditional remedies from the Middle East & North Africa,” improved its EMV by 45% QoQ, while its engagement increased by 80% to 5.2M. It’s no surprise that #CurlyHair and #CurlyHairRoutine were Bounce Curl’s top tags, generating \$2.1M and \$1.7M EMV, respectively. The brand was boosted by an army of consistent curly hair enthusiasts, with creators who had posted in both Q2 and Q3 generating \$4.7M EMV in the latter quarter. YouTuber Curl Vitality dropped a video featuring the Curl Defining Brush, netting \$170.1k EMV. Meanwhile, Ivanna Almonte (@ivannanicollea on TikTok) showcased the brush in comparison with other brushes for a Spanish-speaking audience, inspiring \$275.8k EMV.

**Bounce Curl**  
2023 Q3 Highlights



**\$5.5M**  
Total EMV in Q3

**45%**  
QoQ

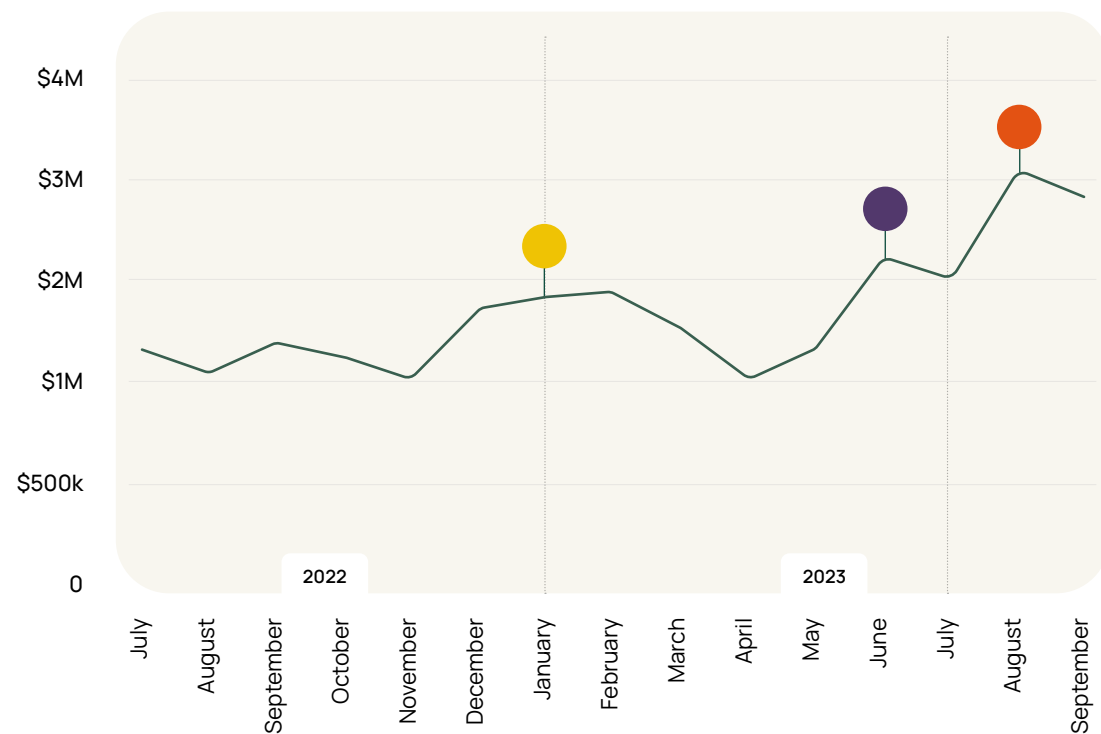
**240**  
Creators

**1.0k**  
Posts

**\$23.0k**  
EMV  
per Creator

**4.3**  
Posts  
per Creator

Monthly EMV Jul 2022 - Sep 2023



Jan 23



Bounce Curl achieves \$1.4M EMV via 106 haircare creators, who share how they incorporate the products into their curly hair routines.

Jun 23



Bounce Curl's potency jumps by 36% MoM to an average of \$17.6k EMV per creator.

Aug 23



#CurlyHair fuels \$835.8k EMV, helping Bounce Curl secure \$2.1M EMV, its highest total during the time period monitored.





## Haircare

# Creators Incorporate Kaleidoscope Hair Products Into Their Rituals

**Kaleidoscope Hair Products** enjoyed an excellent Q3, accruing \$3.2M EMV, up 76% from the previous quarter. The brand largely benefited from various back-to-school activities. Hairstylist Jazminne Wade (@imaslayyobae17) approached strangers to see if they would let her do a free loc retwist. Using the Kaleidoscope So So Slick Braid & Grip Gel, she refreshed a teenager's hair in time for school, generating \$294.4k EMV. Meanwhile, entrepreneur Miracle Watts (@miraclewatts00) used Kaleidoscope Hair Products to refresh her hair after taking out her goddess braids. Her partner trimmed her natural hair, sparking enthusiasm from fans who responded with stories about their men doing their hair. Sharing a discount code for Kaleidoscope Hair Products, Miracle inspired \$170.2k EMV.

## Kaleidoscope

2023 Q3 Highlights



**\$3.2M**  
Total EMV in Q3

**76%**  
QoQ

**68**

Creators



**191**

Posts



**\$47.7k**

EMV  
per Creator

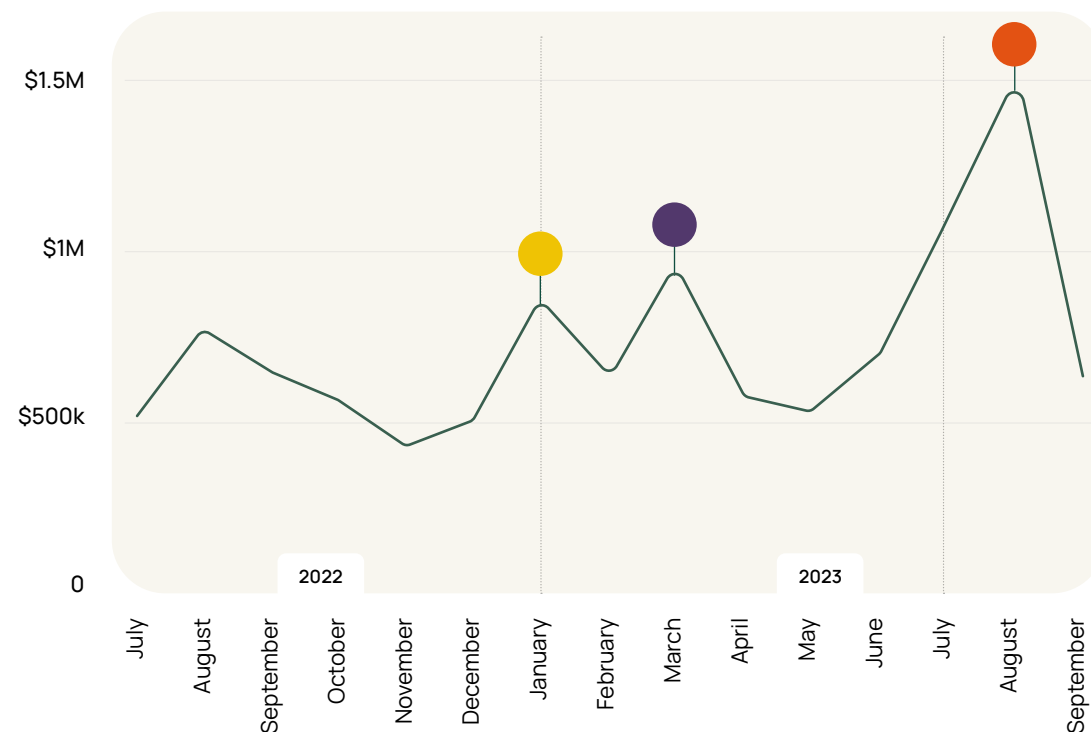


**2.8**

Posts  
per Creator



## Monthly EMV Jul 2022 - Sep 2023



Jan 23



Kaleidoscope Hair Products achieves a potency of \$32.4k EMV per creator.

Mar 23



The brand enjoys an uptick of 82 posts, with its post volume increasing 37% MoM

Aug 23



Kaleidoscope Hair Products generates \$1.5M EMV via 85 posts, its peak during the time period monitored.



U.K.

# Clarins Goes Cryo

Luxury European brand **Clarins** went viral in Q3, amassing \$5.5M EMV. Clarins generated buzz via the cryo starter technology embedded in its Cryo Mask, which drops the skin's temperature by four degrees and minimizes the appearance of pores. #CryoBeauty collected \$411.7k EMV via three creators, including Charlotte Gamage (@skinbylottie on TikTok), who inspired \$206.0k EMV. Meanwhile, creator Ewoma Ukeleghe (@skndoctor) informed followers of the mask's renewal properties, sparking \$143.7k EMV. While the beginning of the quarter was full of freezing cryo frenzy, the brand's cult favorite Lip Comfort Oil took up the baton at the end of Q3. The lip oil generated \$1.8M EMV, of which \$1.2M, or 69%, was accrued in September alone. The lip oil's resurgence was largely due to aesthetics, with creators including the product in hauls of pretty packaging, favorite pink lip products, and more. In all, #LipOil garnered \$694.7K EMV, helping Clarins achieve an 88% quarter-over-quarter EMV growth.

## Clarins

2023 Q3 Highlights



**\$5.5M**  
Total EMV in Q3

**88%**  
QoQ

**608**  
Creators



**2.1k**  
Posts



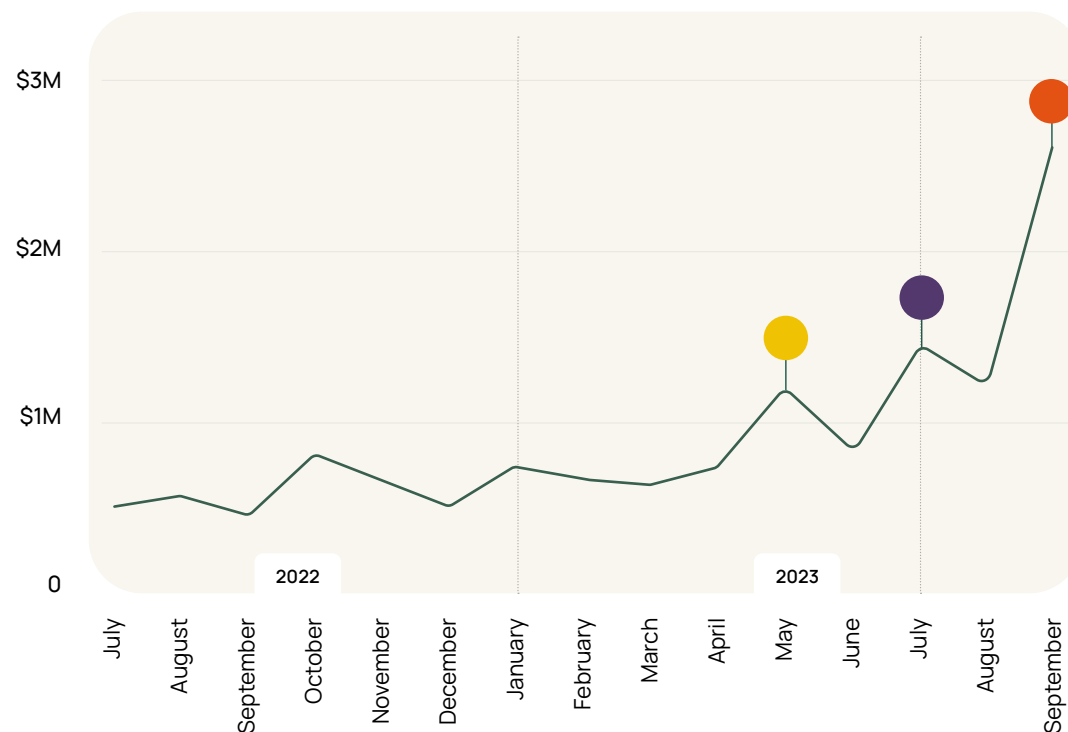
**\$9.0k**  
EMV  
per Creator



**3.5**  
Posts  
per Creator



### Monthly EMV Jul 2022 - Sep 2023



May 23



Clarins' post volume jumps to 595, up 56% from the previous month.

Jul 23



Clarins activates creators around its Cryo-Flash Mask ahead of its release, inspiring a 72% MoM EMV increase.

Sep 23



The brand's lip oil wins attention from creators, inspiring \$1.2M EMV.

France

# Retained Creators Spark EMV for Huda Beauty

**Huda Beauty** was a go-to for many makeup tutorials in Q3, securing \$6.7M EMV in France. Launched by beauty blogger Huda Kattan, the brand's Q3 star was the Easy Bake Loose Powder, which generated \$2.4M EMV via 115 creators. Overall, Huda Beauty's 96% quarter-over-quarter increase was largely sparked by organic efforts from retained creators, or those who posted in both Q2 and Q3. Of Huda Beauty's Q3 total, \$5.0M EMV, or 74%, was generated by retained creators. This cohort included the brand's top five highest-earning advocates, including No. 1 overall EMV-driver Esra (@lilylilah on TikTok), who featured Huda Beauty in videos showcasing the efficacy of more expensive products on one half of her face versus more affordable products on the other. Netting \$724.7k EMV, Esra's content represented a 92% QoQ gain for the creator. Additionally, No. 2 EMV-driver Giorgina Juanita (@gjuanita) secured \$579.8k EMV, up 551% QoQ, largely via fall GRWMs.

Huda Beauty  
2023 Q3 Highlights



**\$6.7M**  
Total EMV in Q3

**96%**  
QoQ

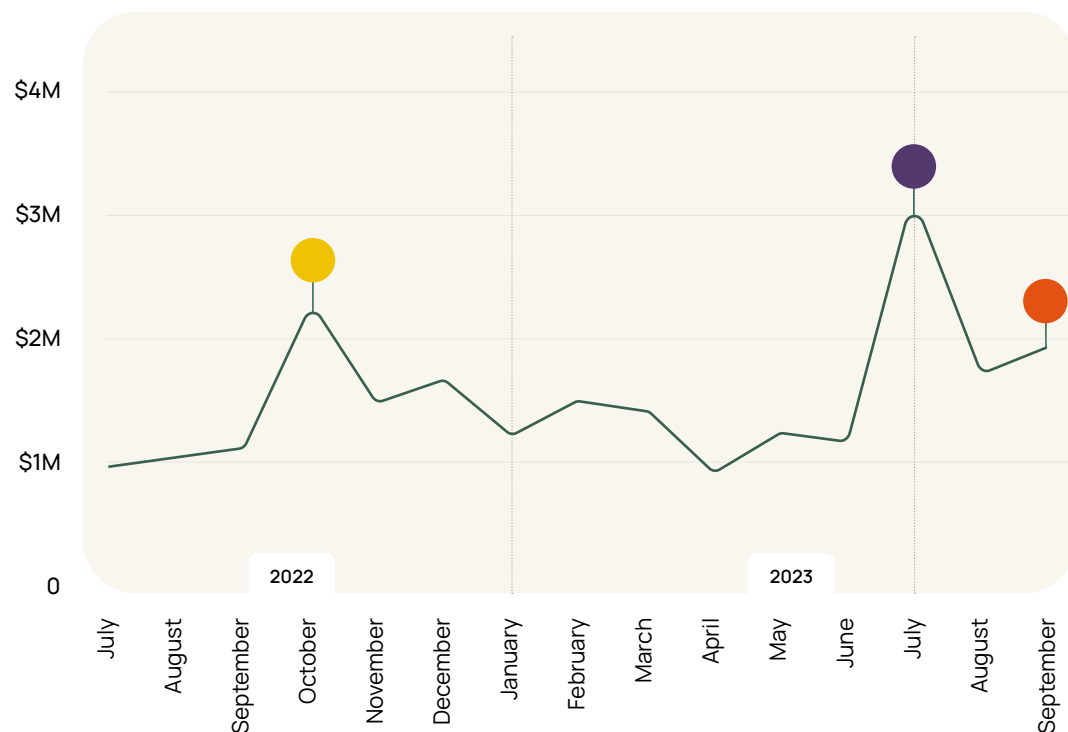
**301**  
Creators

**911**  
Posts

**\$22.3k**  
EMV  
per Creator

**3.0**  
Posts  
per Creator

Monthly EMV Jul 2022 - Sep 2023



Oct 22



Huda Beauty's potency jumps to an average of \$14.1k EMV per creator from a potency of \$7.5k the previous month.

Jul 23

Enjoying a 152% month-over-month surge, Huda Beauty collects \$3.0M EMV.

Sep 23

The Easy Bake Loose Powder generates \$996.4k EMV, roughly 50% of Huda Beauty's \$2.0M EMV monthly total.