

Photo credit // @paulmitchell on instagram

Q4
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

2023 was quite the year, but we made it through thanks to the power of beauty!

At the forefront of Q4's most sensational campaigns was the holiday season. #HalloweenMakeup drove a staggering \$14.5M EMV for Mehron Makeup in the U.S., thanks to the brand's winning Paradise Makeup body and face paints collection. Melt Cosmetics also used the spooky season to leverage its partnership with true crime makeup YouTuber Bailey Sarian.

In the U.K., P. Louise Makeup Academy leveraged both Halloween and Christmas. #HalloweenMakeup drove \$1.6M EMV, and the brand relished in a frosty partnership with makeup creator Mikayla Nogueira (@mikaylajmakeup on Instagram).

Holiday season can only mean advent calendars, and Rituals got the memo. #CalendrierDeLaVent generated traction and giveaways were the vehicle of choice. That was also the case for Navy Hair Care, whose giveaways hosted by Daryl-Ann Denner boosted the brand's EMV haul.

Speaking of giveaways, Paul Mitchell took the giving season to the next level by sponsoring a star-studded Baby2Baby gala.

What's beauty without winning products? Skincare took home the crown for the most impactful products among indie brands: the Clarins Lip oil remained a classic, while Peter Thomas Roth stole the show with its Instant FIRMx Eye Temporary Eye Tightener.

It's the moment we've all been waiting for—let's dive into the Q4 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

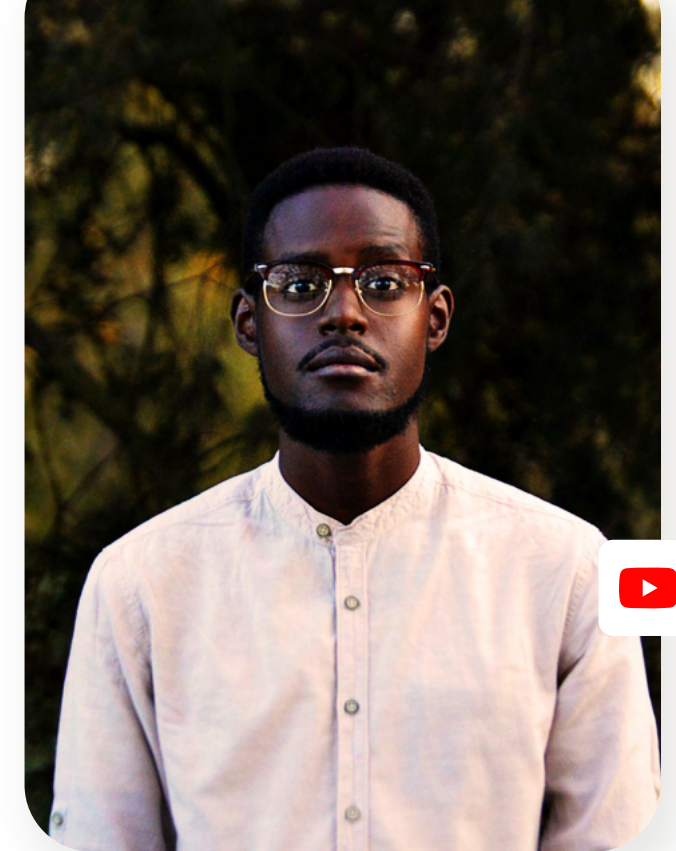
Platforms including

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

Engagement via

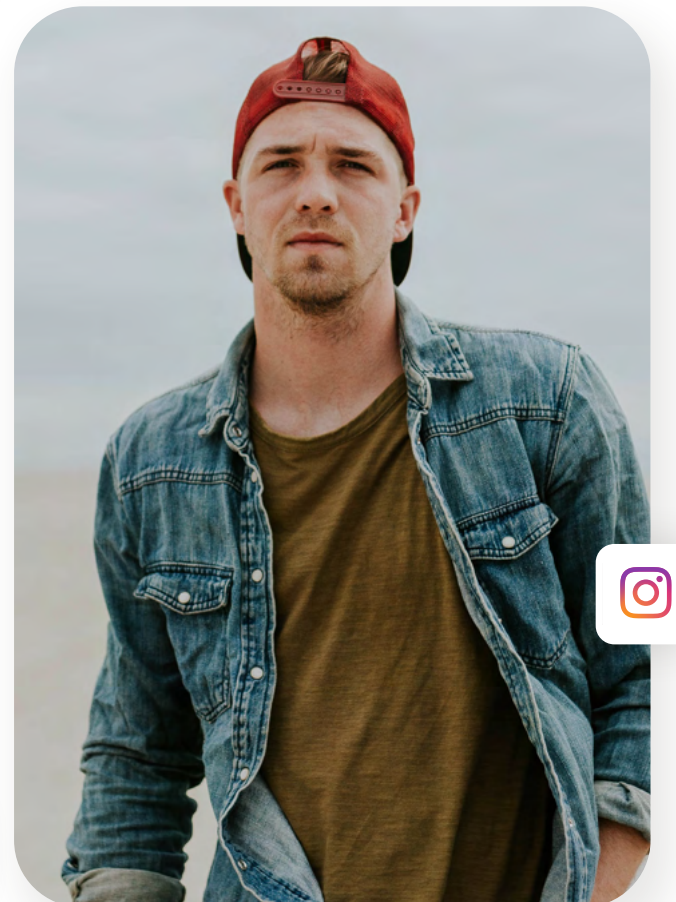
-  Comments
-  Tweets/Retweets
-  Favorites
-  Likes
-  Pins/Repins
-  Shares
-  Video Views

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

Mehron Makeup, the Go-To Halloween Pick

Mehron Makeup closed 2023 with an impressive 125% quarter-over-quarter EMV improvement. The brand took advantage of the Halloween season: #HalloweenMakeup was Mehron Makeup's No. 1 tag, powering a staggering \$14.5M EMV. How did the brand become the go-to choice for creative Halloween looks? Mehron Makeup's world-renowned Paradise Makeup AQ collection. The cruelty-free face and body paint palette fueled \$10.2M EMV, capturing the attention of 354 creators. The collection was a perfect companion for Mehron Makeup's #31DaysOfHalloween campaign, an initiative that encouraged Halloween lovers to submit their best looks for a chance to win the Paradise Makeup palette, plus the glory of having the most creative costume. Two creators surpassed \$1M EMV in their contributions to the brand: Holly Murray (@hollymurraymakeup on Instagram) and Mei Pang (@meicrosoft). Mei used Mehron products for avant garde inverted makeup (\$1.6M), while Holly transformed herself into Handsome Squidward (\$1.9M).

Mehron Makeup

2023 Q4 Highlights



\$40.8M
Total EMV in Q4

125%
QoQ

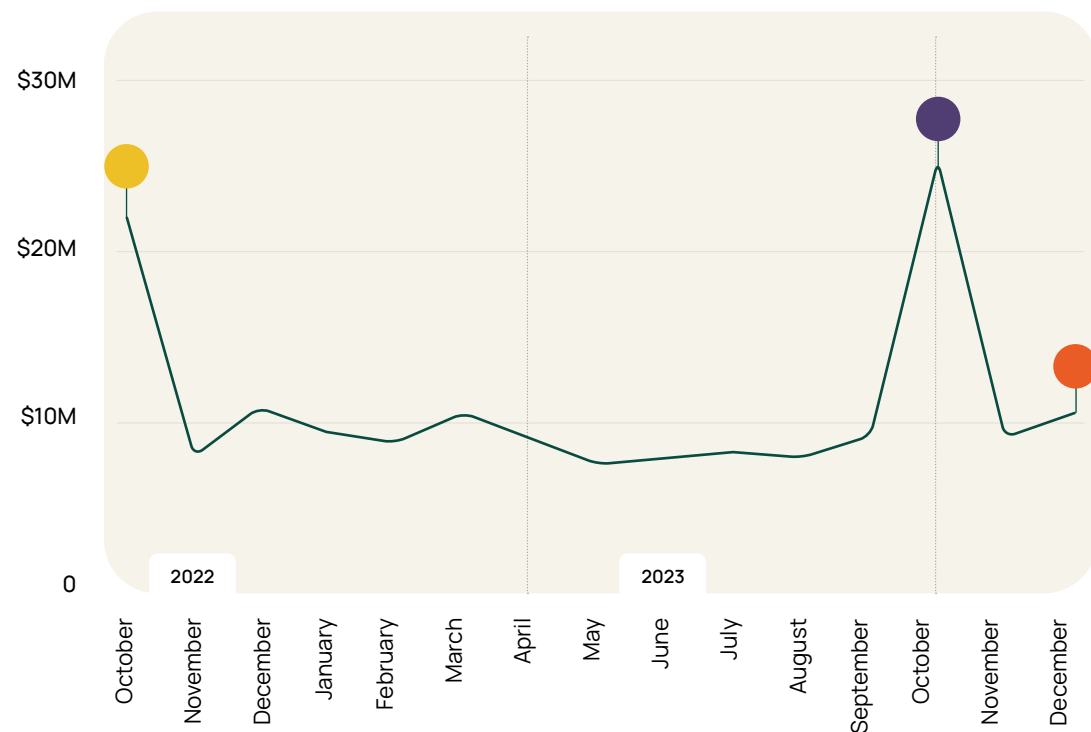
1.4k
Creators

9.8k
Posts

\$29.8k
EMV
per Creator

7.1
Posts
per Creator

Monthly EMV Oct 2022 - Dec 2023



Oct 22



Janani Selvaradj (@jananiselvaradj) is Mehron Makeup's top creator, powering over \$1.0M EMV with her Halloween looks.

Oct 23



Between #HalloweenMakeup and #31DaysOfHalloween, Mehron Makeup masters Halloween Makeup, and the brand collects a record \$25.7M EMV.

Dec 23



Mehron Makeup's potency rises by 43% from November to an average of \$21.2k EMV per creator.



Cosmetics

Melt Cosmetics, Fatally Yours

Melt Cosmetics also benefited from pumpkin season, with #HalloweenMakeup drawing \$1.1M EMV. Additionally, the brand partnered with True Crime Makeup YouTuber Bailey Sarian to launch a spooky collection. The Fatally Yours collection included deadly lipsticks and eyeshadows, along with dark gels and necessities for a kill-worthy makeover, inspiring \$1.5M EMV. Bailey's efforts amounted to \$1.1M EMV, up 286% from her contributions in the previous quarter. One of her most popular Melt Cosmetics videos for her Murder, Makeup, & Mystery Monday series featured a mom who found her son's severed head in a bucket in her basement. For all the intrigue and mystery that Bailey attached to Melt Cosmetics' brand, she was actually its No. 2 EMV-contributor in Q4. The brand's most impactful creator was Katie Herron (@madeupbykaty), who included Melt Cosmetics products in 11 pieces of content, totaling \$1.1M EMV. Overall, the brand powered \$11.4M EMV and improved its QoQ EMV by 70%.

Melt Cosmetics

2023 Q4 Highlights



\$11.4M
Total EMV in Q4

70%
QoQ

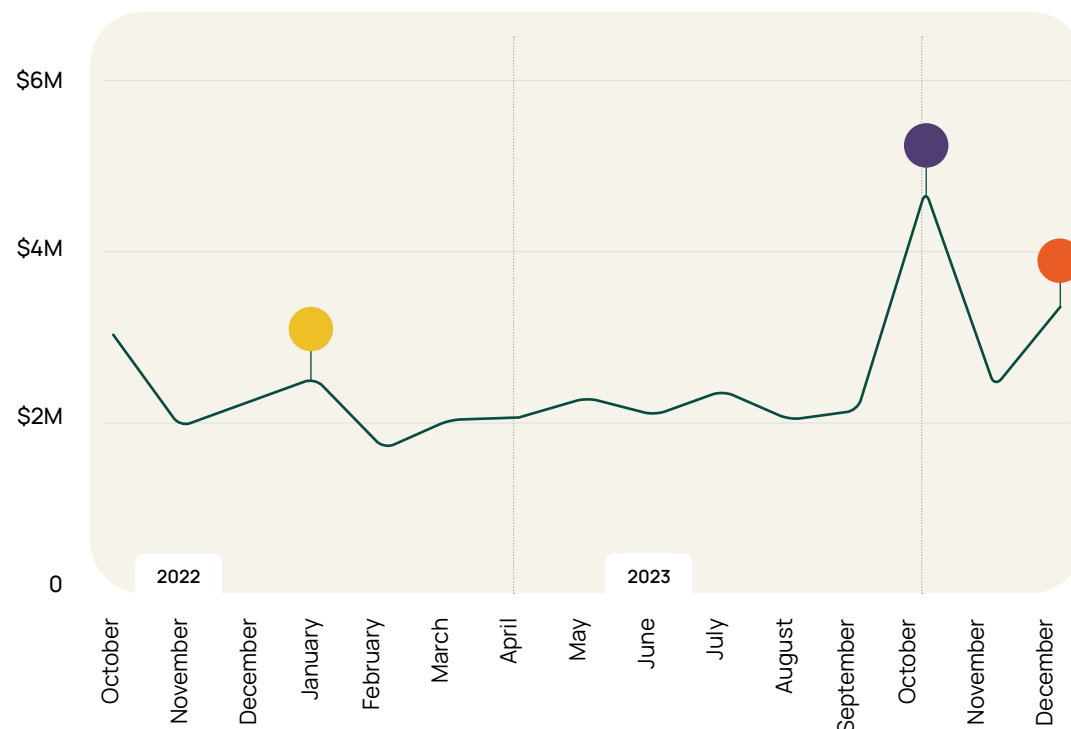
746
Creators

3.2k
Posts

\$15.3k
EMV
per Creator

4.2
Posts
per Creator

Monthly EMV Oct 2022 - Dec 2023



Jan 23



Melt Cosmetics collects \$2.6M EMV, thanks to YouTuber Bailey Sarian's true crime makeup stories (\$355.5k EMV), as well as its popular brow collection (\$317.9k EMV).

Oct 23



#HalloweenMakeup powers \$1.1M EMV in October alone.

Dec 23



#MeltXBaileySarian inspires \$496.5k EMV, celebrating its winning collaboration with Bailey Sarian.

Skincare

Clarins Lip Oil Is THE Holiday Lip Gloss

Clarins Skincare enjoyed notable growth in Q4, amassing \$14.9M EMV, up 70% quarter-over-quarter. The cult-favorite Lip Comfort Oil accounts for half of this EMV haul, powering an impressive \$7.4M EMV. A total of 555 creators created content around the tinted, hydrating lip oil. The brand closed the quarter with 1.2k creators, a 120% QoQ community expansion. Almost 20% of Clarins Skincare's EMV in Q4 was sponsored, while the brand's top tag was #ClarinsPartner (\$2.9M EMV). Throughout Q4, Clarins Skincare activated creator partners like Mikayla Nogueira (@mikaylanogueira on TikTok), who showed how to use Clarins' serums to create candy apple skin (\$171.6k EMV). The brand's No. 1 EMV-driver was Jessica Goncalves (@jessiscg on Instagram), who declared the burgundy wine shade of the lip oil to be "THE christmas lip gloss" and likened it to "molten red satin & sequins" (\$604.2k EMV). Overall, Clarins Skincare benefited from a 123% year-over-year uptick.

Clarins Skincare

2023 Q4 Highlights



\$14.9M

Total EMV in Q4

70%
QoQ

1.2k

Creators

2.3k

Posts

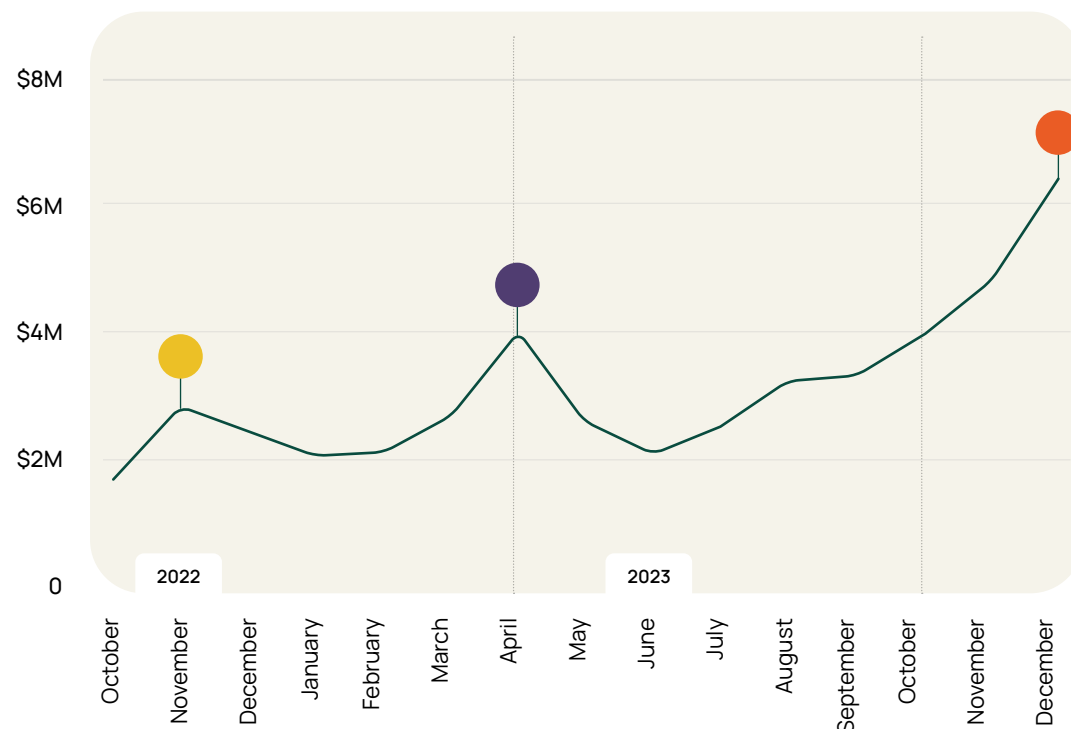
\$12.7k

EMV
per Creator

1.9

Posts
per Creator

Monthly EMV Oct 2022 - Dec 2023



Nov 22



Clarins Skincare's impressions peak at 49.0M, up 119% MoM due to holiday activations.

Apr 23



The Lip Comfort Oil collects \$2.1M EMV via 183 creators.

Dec 23



The Lip Comfort Oil garners \$2.9M EMV, due to the product's popularity and holiday shade activations.

Skincare

Peter Thomas Roth Eyes an Excellent Q4

Prestige skincare brand **Peter Thomas Roth** enjoyed a glowing Q4, netting \$9.2M EMV, a 72% QoQ growth. The brand's success came down to its popular Instant FIRMx Eye Temporary Eye Tightener and eye masks, as well as the efforts of model Nyane Lebaoja (@nyane on Instagram). Holiday stress brings on the wrinkles, but they're no match for Peter Thomas Roth: the Instant FIRMx Eye Temporary Eye Tightener promised anti-aging effects and an antidote to under-eye puffiness. The product caught the eye of 33 creators, who powered \$555.3k EMV, while #PeterThomasRothInstantFirmEye collected \$439.7k EMV. The biggest needle-mover for Peter Thomas Roth in Q4, however, was the work of Nyane, who contributed \$1.1M EMV. Her 11 posts included a Let's Remove My Makeup series, a set of Reels in which Nyane is a NPC in the midst of a bedtime routine.

Peter Thomas Roth

2023 Q4 Highlights



\$9.2M
Total EMV in Q4

72%
QoQ

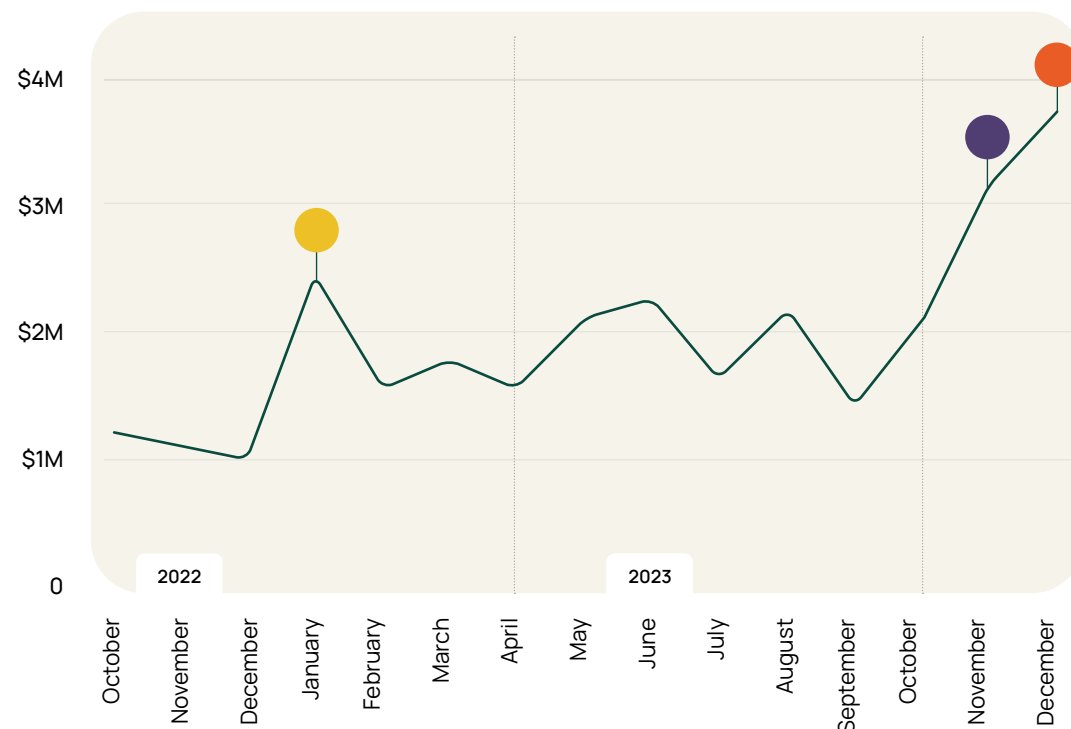
1.1k
Creators

2.3k
Posts

\$8.3k
EMV
per Creator

2.1
Posts
per Creator

Monthly EMV Oct 2022 - Dec 2023



Jan 23



Peter Thomas Roth's community expands to 588 creators, a 49% MoM increase.

Nov 23



Thanks to hype for the Instant FIRMx Eye Temporary Eye Tightener, Peter Thomas Roth collects \$3.2M EMV, a 47% MoM improvement.

Dec 23



Securing 83.7M impressions, Peter Thomas Roth enjoys a 170% MoM growth.

Haircare

Paul Mitchell Sponsors Star-Studded Baby2Baby Gala

Paul Mitchell closed Q4 with \$6.1M EMV, a 52% quarter-over-quarter improvement. Not only did the brand's estimated impressions grow by 119% QoQ, but its potency jumped by 58% MoM to an average of \$9.0k EMV per creator. What sparked momentum for the family-owned salon-favorite? In November, Paul Mitchell was the sponsor of the Baby2Baby Gala. Supporting the Baby2Baby organization's efforts to minimize the negative impacts of child poverty, the event drew A-listers dedicated to supporting a good cause and having a good time. In all, #Baby2Baby contributed \$583.6k EMV in November alone. It's no surprise that E! News was a top contributor to conversation about Paul Mitchell, mentioning the brand in 31 posts. Actress Salma Hayek Pinault (@salmahayek on Instagram) received the event's Giving Tree Award (\$286.9k EMV), while Jessica Alba (@jessicalba) highlighted both her fit for the night as well as Baby2Baby's mission (\$164.7k EMV).

Paul Mitchell
2023 Q4 Highlights

\$6.1M
Total EMV in Q4

52%
QoQ

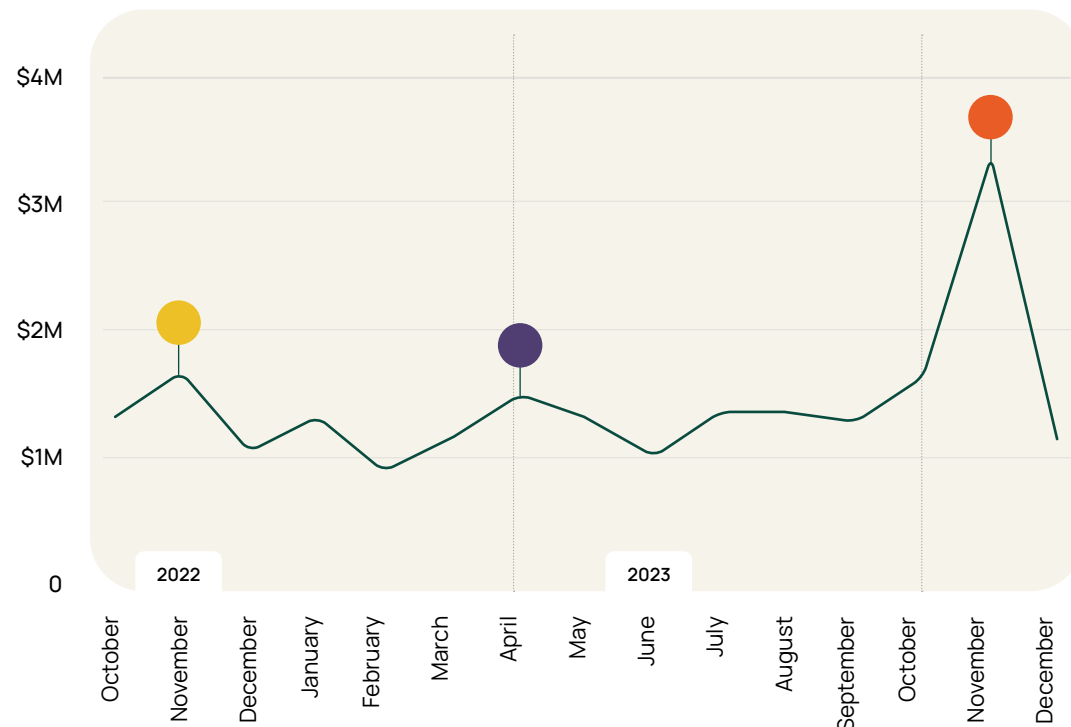
678
Creators

2.3k
Posts

\$9.0k
EMV
per Creator

3.4
Posts
per Creator

Monthly EMV Oct 2022 - Dec 2023



Nov 22



Paul Mitchell presents the Baby2Baby Gala, inspiring a small jump to \$1.7M EMV.

Apr 23



Paul Mitchell's post volume surges to 1.1k posts, the highest during the time period monitored.

Nov 23



Paul Mitchell's Baby2Baby Gala, popular among celebrities, helps the brand garner \$3.3M EMV, its highest total during the time period monitored.

Navy Hair Care's Giveaway Frenzy

Navy Hair Care's \$5.8M EMV in Q4 represented a 191% year-over-year growth. The cruelty-free brand captured the hearts of giveaway divas and Instagram moms, just in time for the holiday season. Navy Hair Care's top Q4 hashtag was #Community (\$543.1k EMV), followed by #ChristmasGifting (\$378.6k EMV). Additionally, one creator stole the show by contributing \$1.1M EMV: Daryl Ann Denner. A Dallas-based creator known for her giveaway and family content, Daryl incorporated Navy Hair Care into six posts in Q4. Her most popular post was a holiday giveaway in December, featuring various goodies packed into a Beis suitcase—and, of course, a toddler riding it. Daryl's quarterly contributions represent a 306% QoQ increase. Overall, Navy Hair Care grew its EMV by 61% QoQ.

Navy Hair Care
2023 Q4 Highlights

\$5.8M
Total EMV in Q4

61%
QoQ

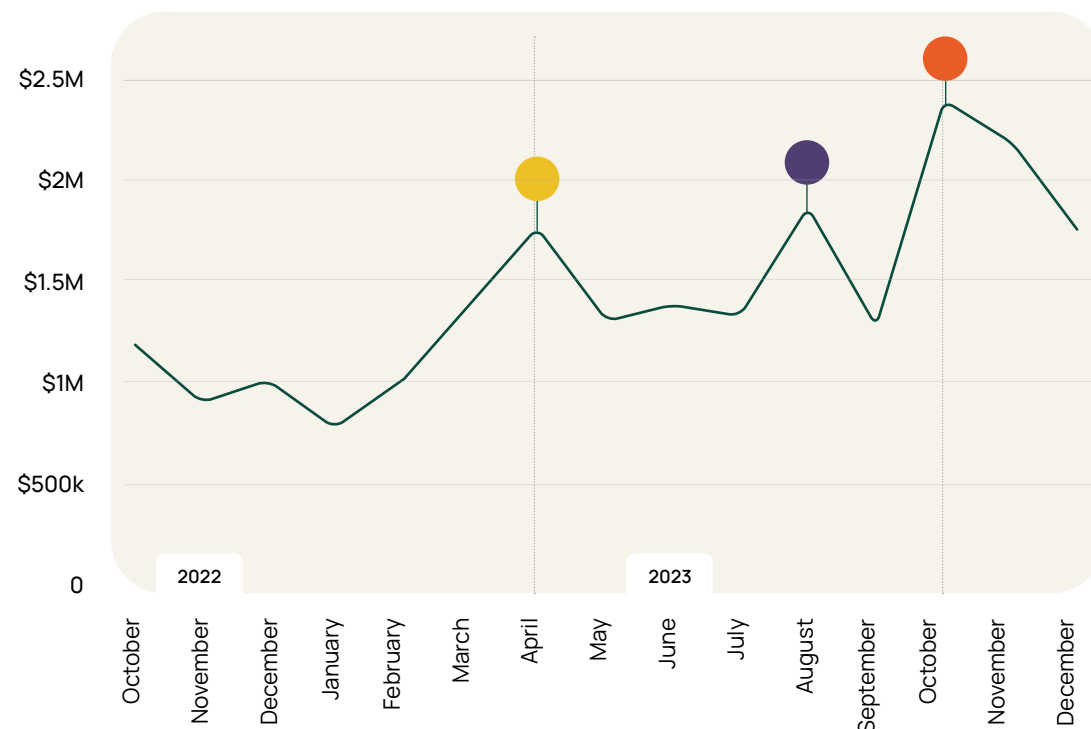
127
Creators

561
Posts

\$45.9k
EMV
per Creator

4.4
Posts
per Creator

Monthly EMV Oct 2022 - Dec 2023



Apr 23



Navy Hair Care's content volume jumps to 476 posts, up 59% MoM.

Aug 23



The brand activates its creator community, inspiring a potency of \$23.3k EMV per creator, up 70% MoM.

Oct 23



Daryl-Ann Denner generates enthusiasm for Navy Hair care via various product giveaways.

U.K.

P. Louise Makeup Academy Gets Frosty

P. Louise Makeup Academy enjoyed a standout Q4, amassing \$21.3M EMV. The cruelty-free brand improved its EMV by 61% quarter-over-quarter thanks to various initiatives. For example, the P. Louise x Mikayla collab, a collection with makeup artist Mikayla Nogueira (@mikaylajmakeup on Instagram), generated \$1.4M EMV. The collection featured winter wonderland-themed palettes, lashes, brushes, and more. The academy threw Mikayla a frosty launch party, equipped with a life-sized snow globe and an ice sculpture. The collection wasn't the only secret to P. Louise's success: notably, the brand's cohort of retained creators, who posted about the brand in both Q3 and Q4, drove \$17.7M EMV, or 83% of P. Louise Makeup Academy's Q4 total. Additionally, the brand captivated Halloween lovers: #HalloweenMakeup drove \$1.6M EMV via 240 creators.

P. Louise Makeup Academy

2023 Q4 Highlights

\$21.3M
Total EMV in Q4

61%
QoQ

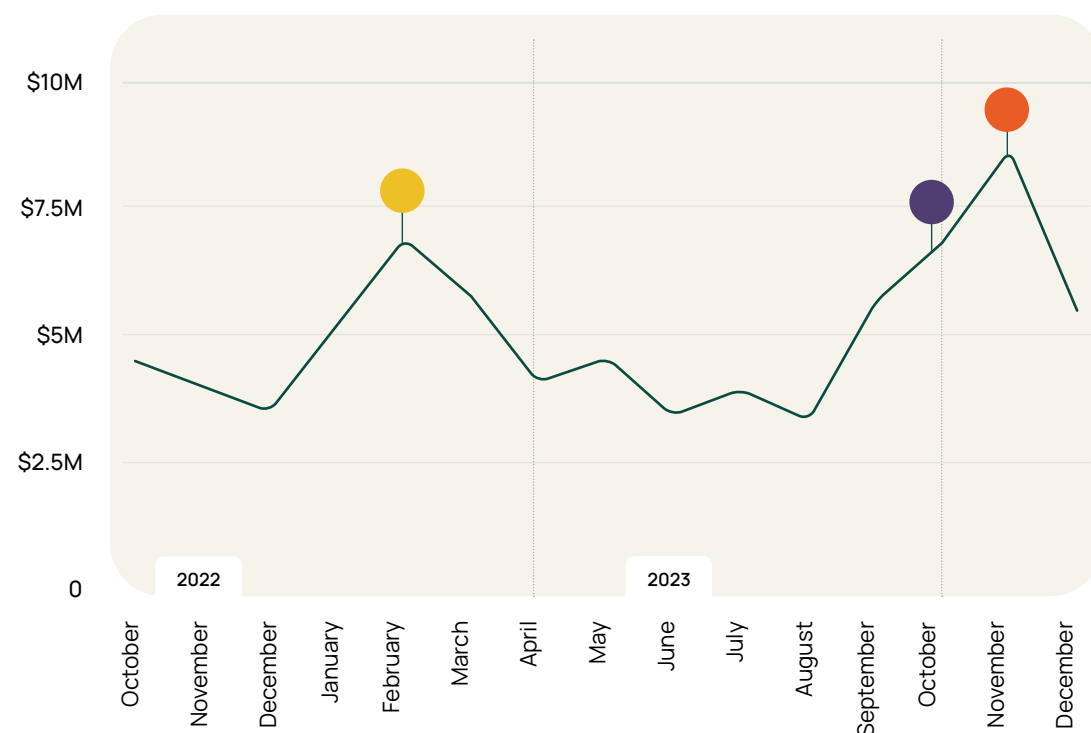
1.2k
Creators

9.5k
Posts

\$17.0k
EMV
per Creator

7.6
Posts
per Creator

Monthly EMV Oct 2022 - Dec 2023



Feb 23



P. Louise Makeup Academy releases its budget box, a cost-effective way to explore the brand's offerings, securing \$7.0M EMV.

Oct 23



Content tagged #HalloweenMakeup inspires \$1.5M EMV.

Nov 23



The P. Louise x Mikayla collection generates \$1.1M EMV.

France



Rituals' Advent Calendar Marks a Successful Holiday Season

Rituals closed 2023 with a jaw-dropping quarter-over-quarter EMV growth of 520%. Much of this growth was due to activations around the brand's advent calendar. Rituals, which aspires to "turn everyday routines into meaningful routines," partnered with creators to run "concours," or giveaways of its advent calendars. #Concours was Rituals' top tag, collecting \$712.6k EMV, while #CalendrierDeLAvent inspired \$666.5k EMV. Holiday activations contributed to a 173% QoQ community expansion (to 437 creators). Lifestyle creator Anais Sanson (@anaissanson_officiel on Instagram) offered five calendars in a giveaway (\$138.9k EMV). Video creator Salomé (@lemondedesalome on Instagram) was Rituals' overall No. 1 EMV-driver, powering \$420.2k EMV via 27 pieces of content. Overall, Rituals secured \$4.0M EMV in Q4.

Rituals

2023 Q4 Highlights



\$4.0M
Total EMV in Q4

520%
QoQ

437
Creators



1.2k
Posts



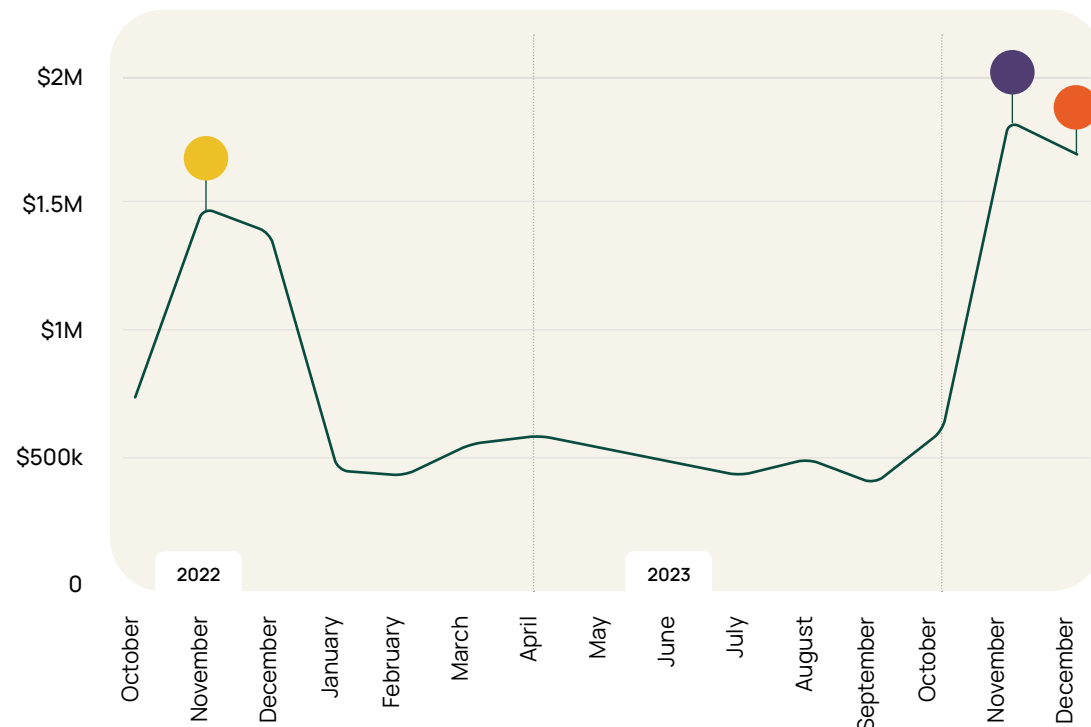
\$9.1k
EMV
per Creator



2.7
Posts
per Creator



Monthly EMV Oct 2022 - Dec 2023



Nov 22



Rituals' potency jumps from an average of \$4.8k EMV per creator to \$8.1k, a 70% MoM improvement, thanks to its 2022 advent calendar.

Nov 23



Advent calendar giveaways fuel a \$1.9M EMV haul.

Dec 23



Multiple creators offer giveaways centered around a Rituals storefront shopping spree. Rituals collects \$1.7M EMV.