

Q2  
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

# New year, new reasons to love indie beauty brands!

It's giving summer in Q2, and brands understood the assignment!

In skincare, sunscreens with a glowing effect like Supergoop!'s Glowscreen and Kopari's Sun Shield Body Glow won over the hearts of fans around the world. Both products achieved SPF 40+ coverage, combining "liquid gold" with sun protection.

Move over Bum Bum Cream! In France, Sol de Janeiro boosted activations around summertime shenanigans with its perfume mists.

Natural looks won in cosmetics, but not for concealers. Natasha Denona's Hy-Glam Concealer had our wrinkles snatched, and creators shared how they incorporated the concealer into date nights and glam lewks. Meanwhile, Haus Labs' Triclone Skin Tech Medium Coverage Foundation kept the girls looking fab.

Over in the U.K., it was all about the gloss. Kiko's plump 3d Hydra Lipgloss hydrated our lips, with #PrettyPackaging to boot.

Argan oil lover Moroccanoil offered prizes to its #BehindTheChair salon professionals community, deepening its Eurovision connections.

Finally, it's time for the summer waves—not the ones in the ocean, but the curls in your hair! Not Your Mother's gained momentum with the Greta Willson Wavy Hair technique, featuring the brand's curl talk products.





Let's dive into the Q2 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

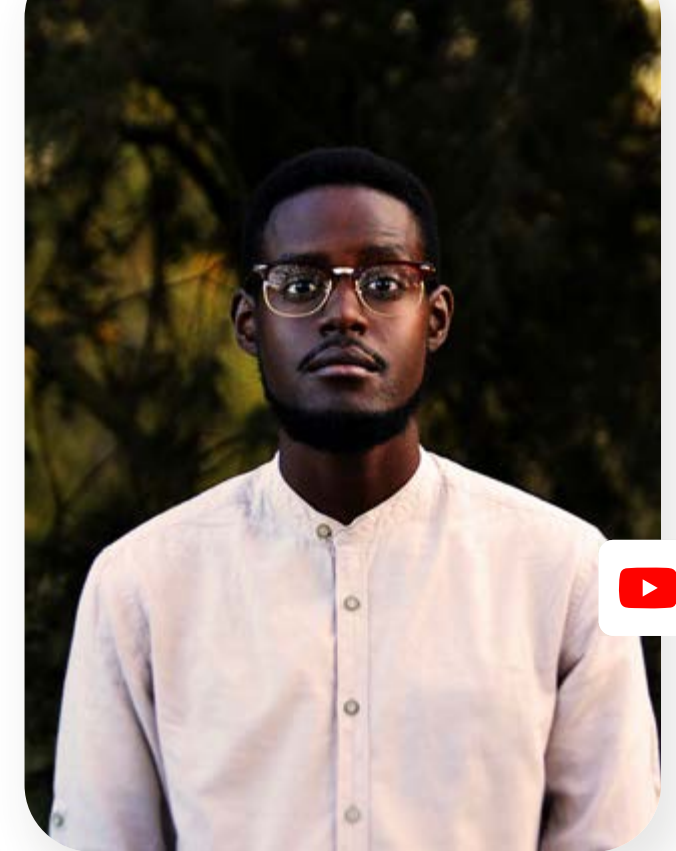
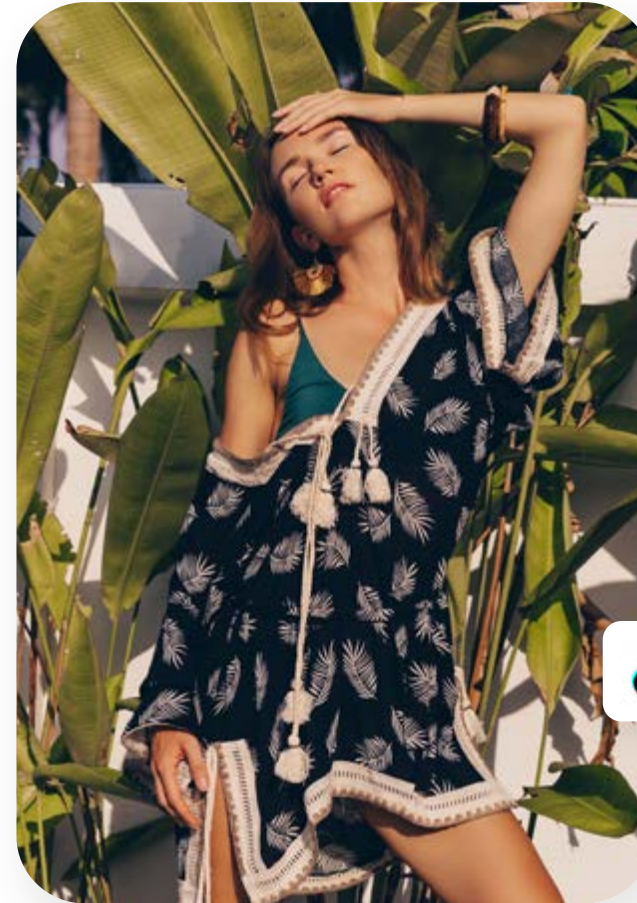
### Platforms including

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

### Engagement via

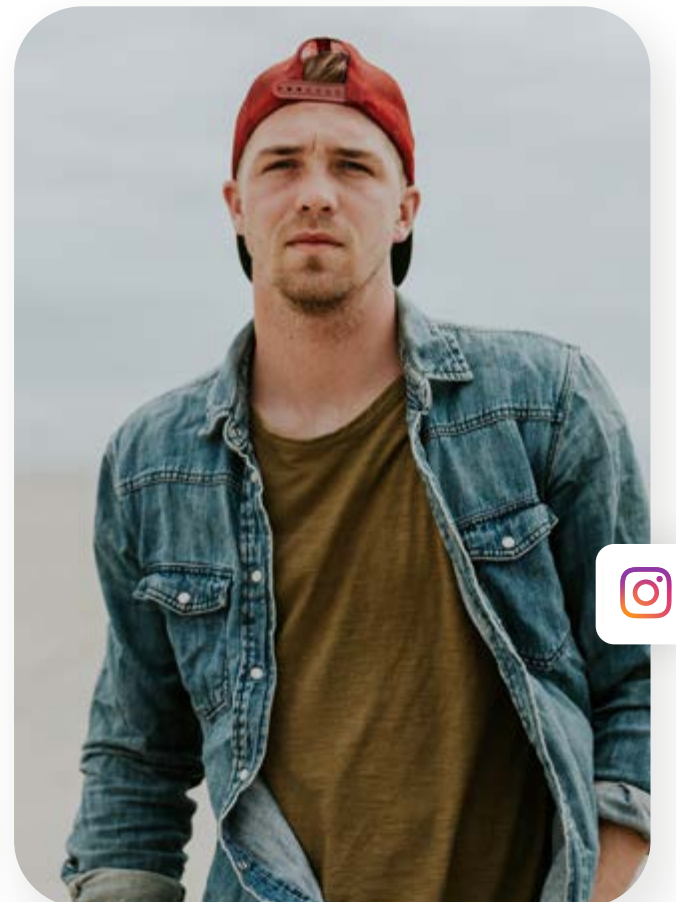
-  Comments
-  Tweets/Retweets
-  Favorites
-  Likes
-  Pins/Repins
-  Shares
-  Video Views

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

# Haus Labs' Skin Tech Foundation Keeps Giving

Celebrity brand **Haus Labs** closed Q2 with \$26.3M EMV, relishing in a 34% quarter-over-quarter increase and a 131% year-over-year surge. One of the biggest drivers for Haus Labs' impressive Q2 performance was the Triclone Skin Tech Medium Coverage Foundation, which netted \$4.5M EMV via 1.2k posts. The clean and talc-free foundation, which launched last year, still delivers. Beauty creator and Sephora Partner Jaclyn Forbes (@jaclynforbes on Instagram) raved about Sephora's Colour IQ tool, which allowed her to find the right Haus Labs foundation color, netting \$142.8k EMV. The brand's overall No. 1 EMV-driver was Lindsey Rowley (@linsmakeuplooks on TikTok), whose Haus eyeliner content inspired \$1.5M via 23 pieces of content.

Haus Labs  
2023 Q2 Highlights



**\$26.3M**  
Total EMV in Q2

**34%**  
QoQ

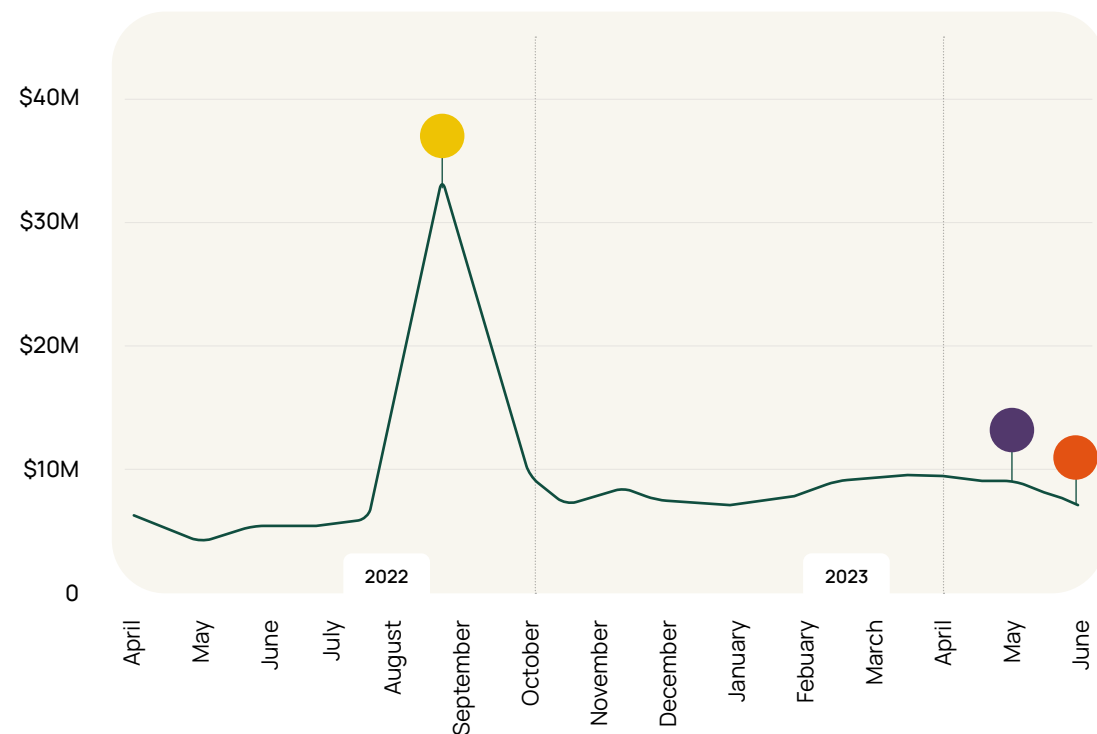
**2.4k**  
Creators

**7.5k**  
Posts

**\$11.0k**  
EMV  
per Creator

**3.1**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



Sep 22



The Triclone Skin Tech Foundation launches, wowing fans with its 51 shades and powering a \$34.2M EMV monthly total for Haus Labs, a jaw-dropping 588% surge.

May 23



The Triclone Skin Tech Medium Coverage Foundation nets \$1.5M EMV, fueling \$9.0M for the brand as a whole.

June 23



#PrideMakeup, one of the brand's top hashtags in June, inspires \$650.1k EMV.

Cosmetics

# Natasha Denona Inspires Glam Looks

Luxury beauty brand **Natasha Denona** enjoyed a prosperous Q2, netting \$16.4M EMV, up 44% from Q1. The brand's performance was buoyed by two products, each of which generated more than \$1.0M EMV. The HY-Glam Concealer accrued \$2.8M EMV via 151 creators. Meanwhile, the Yucca Eyeshadow Palette netted \$1.0M EMV via 198 participating creators. The brand experienced modest growth across multiple areas: its creator community expanded by 37% QoQ to 2.0k, while its post volume improved by 35% QoQ to 6.4k pieces of content. Beauty creator Amanda Benko (@benkobeauty on Instagram) powered online conversations about the brand, contributing \$1.5M EMV via content incorporating Natasha Denona in glam makeup or date night tutorials. Amanda, who posted about the brand in Q1 as well, improved her EMV contributions by 60%, while only posting 3 more times (36 posts in total) than she had in Q1 (33 posts).

Natasha Denona  
2023 Q2 Highlights



**\$16.4M**  
Total EMV in Q2

**44%**  
QoQ

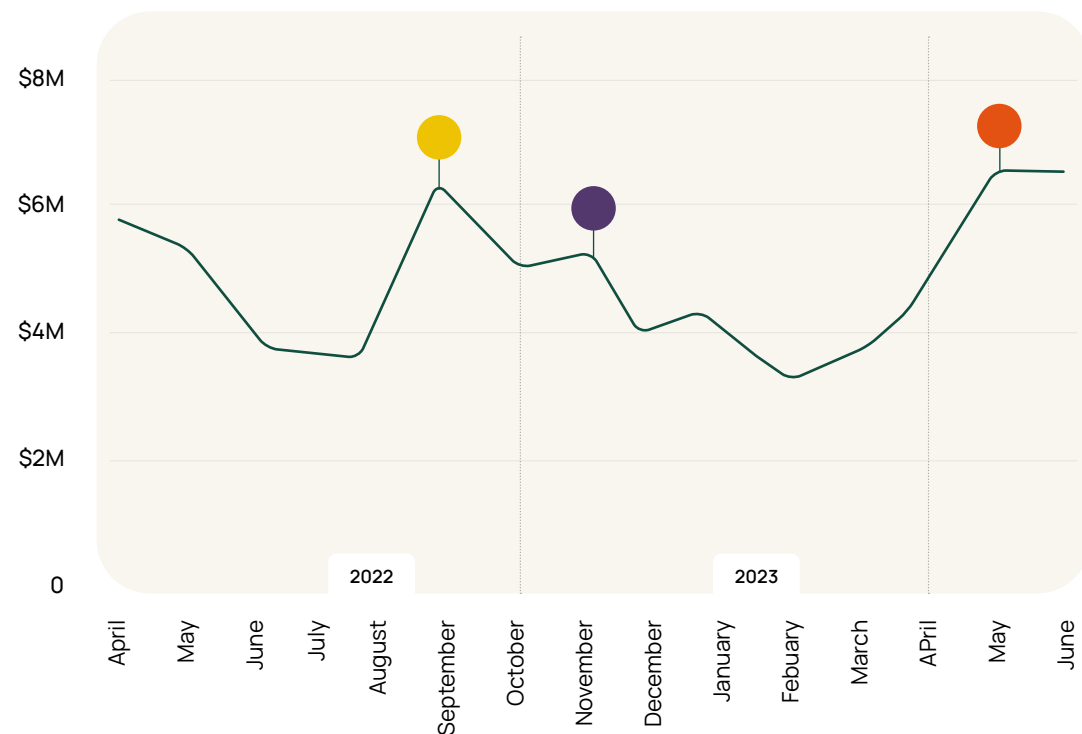
**2.0k**  
Creators

**6.4k**  
Posts

**\$8.3k**  
EMV  
per Creator

**3.2**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



Sep 22



Activations around the release of Natasha Denona's My Dream Collection palette yields a content volume of 3.7k, the highest mark in the time period monitored.

Nov 22



Natasha Denona generates \$5.1M EMV, and averages a potency of \$5.3k EMV per creator.

May 23



The Hy-Glam Concealer enjoys buzz from fans, collecting \$1.5M EMV.

# Supergoop! Glowscreen Enjoys Momentum

**Supergoop!** enjoyed a fantastic Q2, claiming \$21.7M EMV, up 90% from Q1. The secret to the brand's glowing performance? Activations around its summer-friendly products: Supergoop!'s Glowscreen SPF 40 was Q2's No. 1 offering, driving \$3.1M EMV via 579 creators. Meanwhile, the brand's Unseen Sunscreen Broad Spectrum SPF 40 proved popular, contributing \$1.3M EMV during Q2. For Supergoop!, it's not just about the products, but the creators who promote them. Approximately 5% of the brand's EMV was sponsored, while #SupergoopPartner was a top hashtag for the brand, sparking 91 creators to inspire \$1.3M EMV. Beauty creator Mariale Marrero (@mariale on Instagram) was the overall No. 1 EMV-driver, fueling \$907.9k. Improving her QoQ EMV total by 437%, Mariale brought both her followers and Supergoop! along for her vacation.

## Supergoop! 2023 Q2 Highlights

**\$21.7M**  
Total EMV in Q2

**90%**  
QoQ

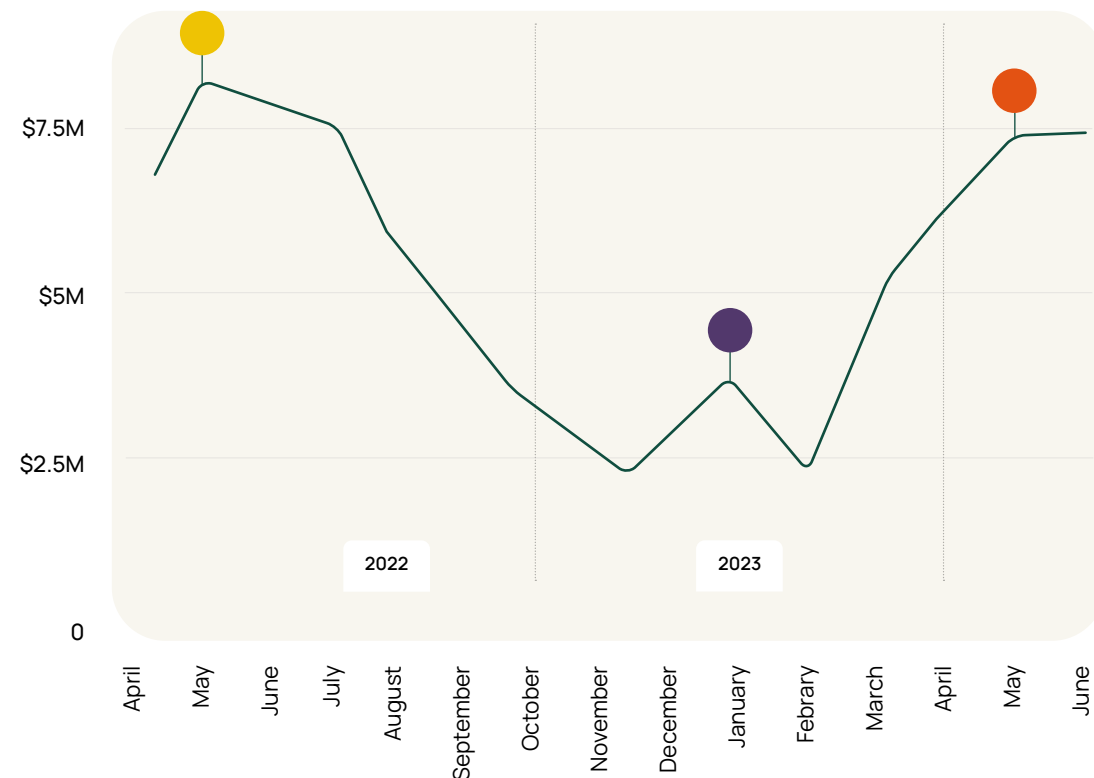
**4.3k**  
Creators

**9.7k**  
Posts

**\$5.1k**  
EMV  
per Creator

**2.3**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



May 22



Supergoop! enjoys 4.9k posts, its highest post volume in the time period monitored.

Jan 23

Securing a 64% month-over-month boost, Supergoop jumps to \$3.8M EMV thanks to a sunscreen launch.

May 23

Supergoop! ramps up activations around its summer products, collecting \$7.5M EMV in May.

Skincare

# Kopari's Liquid Gold Sunscreen Hits Different

**Kopari** achieved notable quarter-over-quarter growth thanks largely to its sunscreen. The brand, known for its clean coconut products, accrued \$7.4M EMV during Q2, a 44% QoQ improvement. #KopariSPF was the brand's No. 2 tag (after #KopariBeauty), generating \$749.9k EMV. Of this total, 93% was collected in April alone, in part because of a sale, as well as the spring launch of the Kopari Sun Shield Body Glow SPF 50 Sunscreen. The sunscreen inspired \$585.3k EMV via 113 creators. Among them, Sarah Wolak (@sarah\_wolak on TikTok) raved about the "liquid gold" protective power of the sunscreen, fueling \$303.2k EMV via four posts. Overall, the brand experienced a 56% QoQ growth in post volume, closing Q2 with 3.6k pieces of content.

Kopari's  
2023 Q2 Highlights

**\$7.5M**  
Total EMV in Q2

**44%**  
QoQ

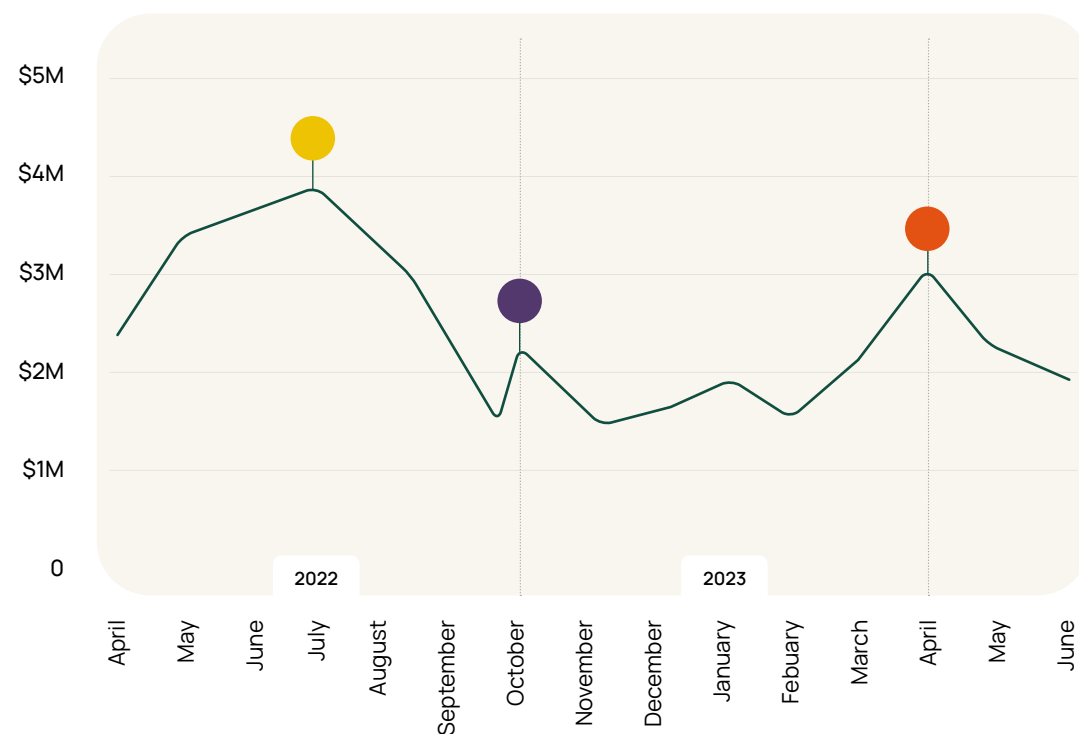
**1.4k**  
Creators

**3.6k**  
Posts

**\$5.4k**  
EMV  
per Creator

**2.6**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



Jul 22



Kopari holds a Fourth of July sale on its Coconut Melt product, used by Kourtney Kardashian. The brand achieved \$3.8M EMV, its highest monthly total in the time period monitored.

Oct 22



Kopari secures an IPSY Glam Bag inclusion, inspiring 1.5k posts, an 87% month-over-month increase.

Apr 23



#KopariSPF nets \$698.0k EMV in April due to the spring release of its Sun Shield Body Glow SPF 50 Sunscreen.

Haircare

# Moroccanoil Remains a #BehindTheChair Fave

Known for its “argan oil-infused beauty,” **Moroccanoil** closed Q2 with an impressive \$10.3M EMV. The brand’s 41% quarter-over-quarter improvement stemmed from its staying power with haircare professionals: #BehindTheChair, a popular haircare community and hashtag used by salon professionals, netted \$2.2M EMV throughout Q2. Additionally, while Moroccanoil benefited from 810 incoming creators, creators who posted about the brand in both Q1 and Q2 were the star of the show. These retained creators powered \$6.6M EMV, or 64% of Moroccanoil’s Q2 total. It’s no surprise that Moroccanoil’s EMV retention score was a robust 71.7%, up 18% QoQ. One such retained creator, Emilia Marantos (@byemmaleah on Instagram), collected \$467.7k EMV via wash day content featuring Moroccanoil’s curling wand and mousse. Emilia posted about the brand 22 times during Q2, achieving a 284% QoQ EMV growth for Moroccanoil.

Moroccanoil  
2023 Q2 Highlights

**\$10.3M**  
Total EMV in Q2

**41%**  
QoQ

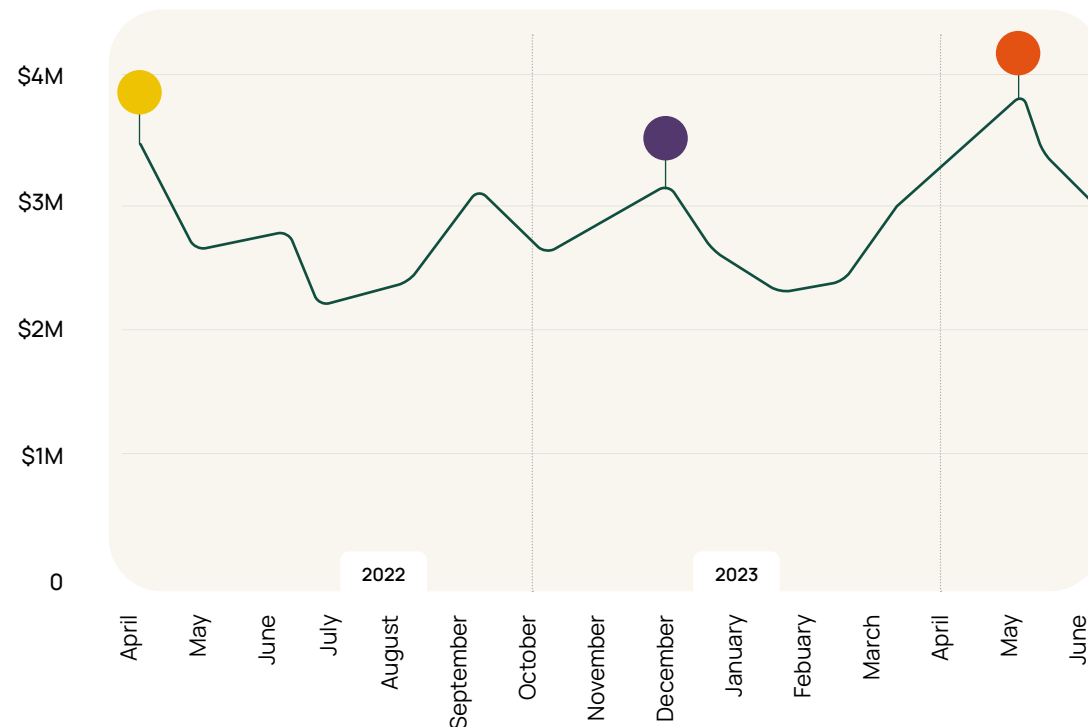
**1.2k**  
Creators

**5.1k**  
Posts

**\$8.4k**  
EMV  
per Creator

**4.2**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



Apr 22



Moroccanoil secures 2.0k posts, its highest monthly content volume in the time period monitored.

Dec 22



The #BehindTheChair community raves about Moroccanoil, with the tag driving \$893.4k EMV.

May 23



Moroccanoil's Global Hair Competition inspires creators to share their style for a chance to receive compensation and Eurovision access.



Haircare

# Let's Talk About Not Your Mother's Curl Products

Securing an impressive 116% QoQ EMV growth, clean haircare brand **Not Your Mother's** enjoyed a fantastic Q2. The brand benefited from conversations about wavy and curly haircare: #2AHair and #2BHair, hair types that correspond to wavy hair, fueled \$296.4k EMV. Additionally, the Greta Wilson Wavy Hair technique, which made use of the brand's curl talk products, went viral, with TikTok creators such as Hannah Mullen (@hannahmullen) and Morgan Elizabeth (@morgan.elizabeth) trying out the technique. The star of the show for Not Your Mother's was haircare creator Sophie Graf (@sophiemariegraf on Instagram), whose content about the curl talk mousse powered \$872.6k EMV, an outstanding 2.2k% QoQ jump. Graf's 15 posts, which ran through her wash day routine and provided followers tips on how to diffuse wavy hair, proved highly impactful.

Not Your Mother's  
2023 Q2 Highlights

**\$3.9M**  
Total EMV in Q2

**116%**  
QoQ

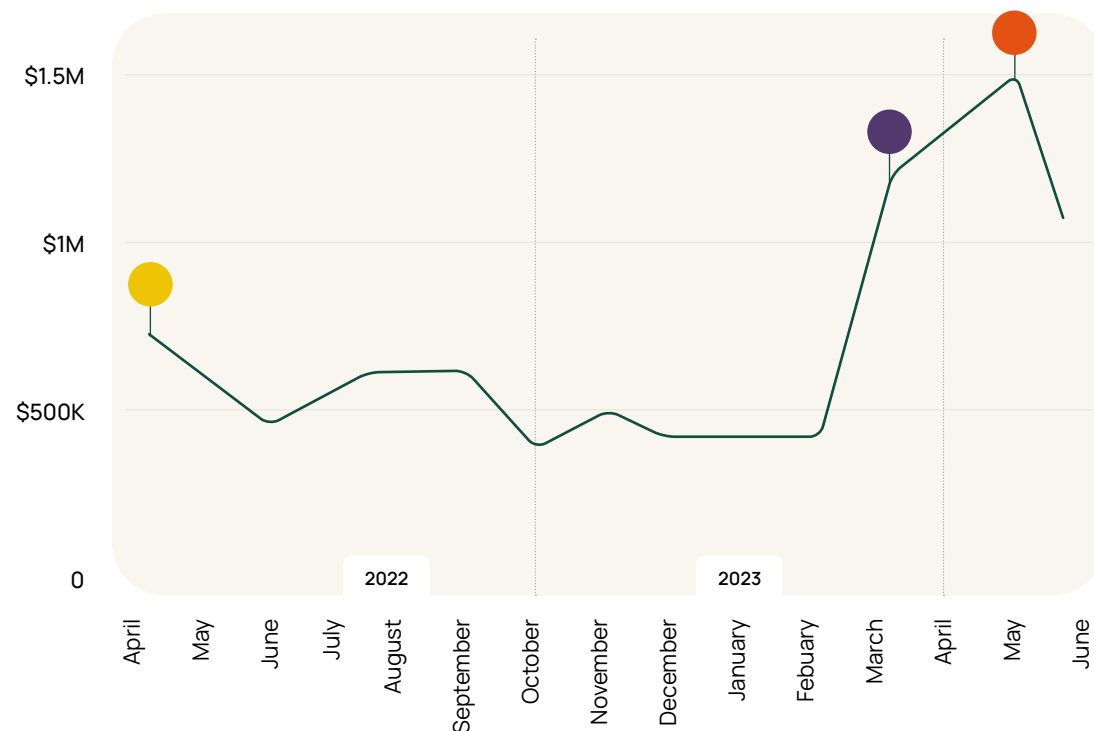
**336**  
Creators

**653**  
Posts

**\$11.5k**  
EMV  
per Creator

**1.9**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



Apr 22



Not Your Mother's secures an average potency of \$7.9k EMV per creator.

Mar 23



Claiming a 150% MoM growth, Not Your Mother's EMV surges to \$995.9k thanks to press around its dry shampoo.

May 23



Achieving its EMV peak (\$1.5M) for the time period monitored, Not Your Mother's generated buzz around its curly-centric products.

U.K.

# Kiko's #PrettyPackaging Fuels EMV

Italian beauty brand **Kiko** enjoyed a standout Q2, generating \$9.9M EMV. Kiko's 58% quarter-over-quarter gain stemmed from both aesthetic pink packaging and the power of its viral lipgloss. The plump-inducing 3d Hydra Lipgloss collected \$1.4M EMV, \$819.1k of which came in May alone. #Lipgloss contributed \$2.6M EMV throughout the quarter, inspiring 44 creators to hype up the product. Creators such as Isabel Wright (@thewrightglow on Instagram) overlaid a Reel featuring several lip glosses with a trending "Hi Barbie" audio track. As Kiko's No. 1 EMV-driver, Isabel fueled \$1.5M, up 120% from the previous quarter. Isabel's 28 posts helped her outpace the brand's No. 2 EMV-driver by \$733.2k EMV. But it wasn't all about the product in Q2: #PrettyPackaging was the No. 2 hashtag for Kiko, yielding \$2.8M EMV—topped only by the branded hashtag.

Kiko  
2023 Q2 Highlights

**\$9.9M**  
Total EMV in Q2

**58%**  
QoQ

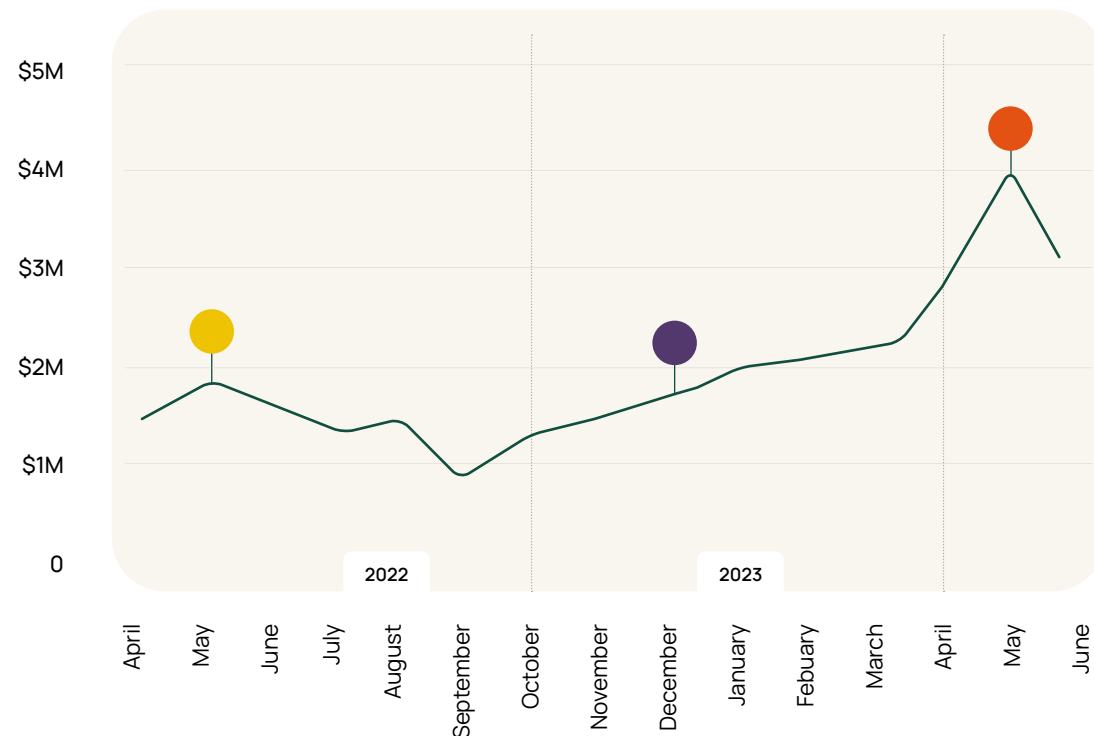
**506**  
Creators

**1.8k**  
Posts

**\$19.5k**  
EMV  
per Creator

**3.5**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



May 22



Kiko creators take advantage of #WakeUpAndMakeup, inspiring \$568.9k EMV via the tag and contributing to 16.5M estimated impressions.

Dec 22



Kiko's estimated reach jumps from 14.2M to 43.3M, a 205% MoM surge.

May 23



Kiko releases limited shades of its 3d Hydra Lipgloss, inspiring \$4.0M EMV, its highest monthly total in the time period monitored.

France

# Sol de Janeiro Brings on the Summer Activations

Nailing an incredible 463% quarter-over-quarter EMV surge, **Sol de Janeiro** reached solar heights in Q2. What better way to usher in the summer than activations around the brand's glowing products? Sol de Janeiro grew its creator community by 171% QoQ, expanding to 268 creators. Generally speaking, this community growth trended toward incoming creators who hadn't posted about the brand in the previous quarter. These incoming creators collectively contributed \$2.0M EMV, or 74% of the brand's Q2 total. It's no surprise that the brand's top tag was #SolDeJaneiroPartner, driving \$1.2M EMV via 58 creators. Brand partner Lea Elui (@leaelui on Instagram) incorporated the brand's products into content around her summer routine and favorite mists, available in Sephora France. In all, Lea generated \$427.5k EMV for Sol de Janeiro.

Sol de Janeiro  
2023 Q2 Highlights



**\$2.7M**  
Total EMV in Q2

**463%**  
QoQ

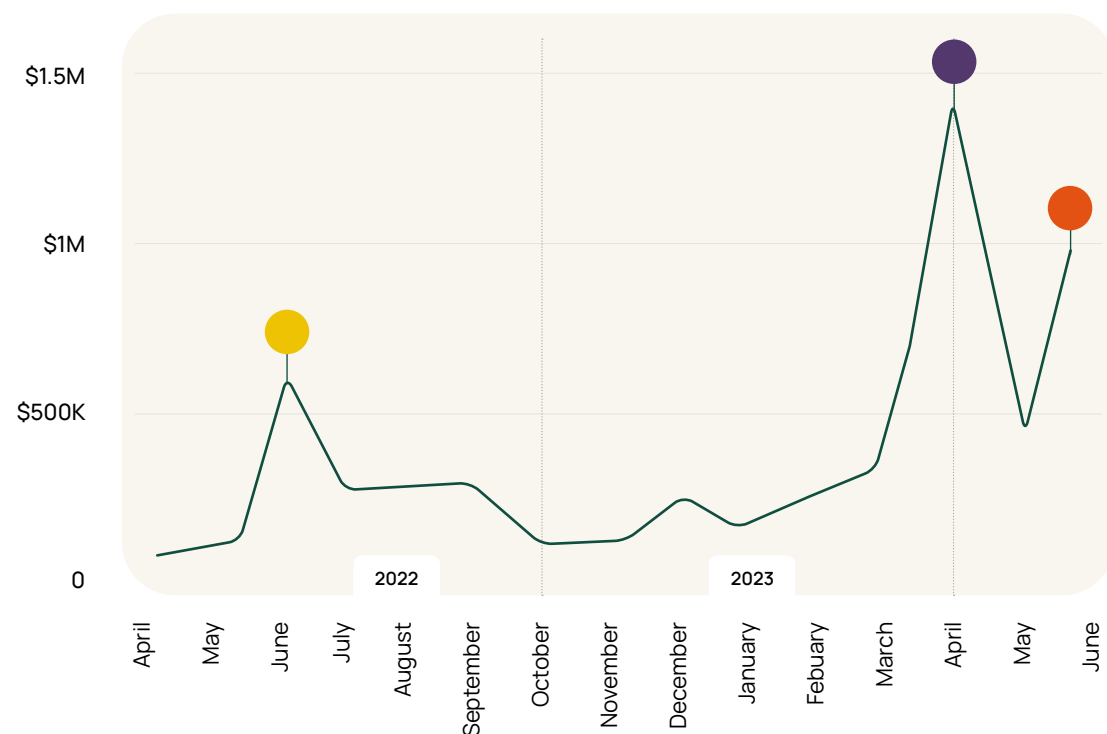
**268**  
Creators

**494**  
Posts

**\$10.2k**  
EMV  
per Creator

**1.8**  
Posts  
per Creator

Monthly EMV Apr 2022 - Jun 2023



Jun 22



Sol de Janeiro achieves an average potency of \$10.4k EMV per creator, a 324% month-over-month boost, thanks to its exclusive Beija Flor line.

April 23



Creators share their favorite Sol de Janeiro mists, inspiring \$1.3M EMV, the highest total in the time period monitored.

June 23



Sol de Janeiro activates creators, inspiring the brand's content volume to reach 197 posts—the greatest monthly total during the time period monitored.