2017

Standing Out:
How Beauty and Personal Care Brands
Can Make an Impact with Social Video

PIXABILITY

The mall is no longer where consumers discover beauty and personal care products

— instead, consumers are turning to social video platforms to find and compare products, understand new styles, and ultimately make brand decisions.

222B

Total views of beauty and personal care videos on YouTube

65%

year-over-year growth of the beauty and personal care space on YouTube

$1.6B

increase in e-commerce beauty sales in 2017

Beauty and personal care consumers have created passionate communities across YouTube, Facebook, Instagram, Twitter, and Snapchat. On YouTube alone, the combined beauty and personal care space attracts 222B total views, and has grown by 65% year-over-year as more and more consumers turn to social video to watch reviews, connect with influencers, and inspire their next beauty routine. Consumers are engaging with each social video platform in different ways, but through a deep knowledge of their viewing preferences, combined with each platform's unique set of targeting capabilities and ad formats, brand marketers have an opportunity to make an impact on these consumers throughout their online purchase journey.

Increasingly, there's an overlap between the beauty space and the personal care category (defined as body wash, deodorant, or other body care) in the video ecosystem, and the adjacent spaces are rapidly evolving. We've seen a surge of independent brands, often backed by popular influencers or celebrities, enter the space. The rise of e-commerce has also completely changed how consumers purchase beauty and personal care products. In 2017, U.S. e-commerce sales of personal care products grew by 6X over the increase in brick-and-mortar sales. In-store sales of beauty products actually declined in 2017, while e-commerce beauty sales rose by $1.6B.[1]

In this study, Pixability analyzes the beauty and personal care categories across YouTube, Facebook, Instagram, Twitter, and Snapchat, unpacking the performance of top brands, influencers, content types, product categories, and ad formats. Armed with these data-driven insights, brand marketers can better plan their video strategies, and maximize the impact of their cross-platform video advertising investments.
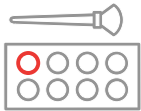
Brands own

2%

of views out of the **219B** total views in the beauty space on YouTube

Brands own

26%

of views out of the **28B** total views in the personal care space on YouTube

12%

increase in paid media by top influencers on YouTube in 2017

75%

of the top beauty brands on Twitter also own a fashion line

Top brands are posting

2X

more videos on Instagram than in 2016

60%

of all people interested in top beauty brands on Facebook are **millennials ages 18-34**

Across top beauty videos on YouTube, tutorial videos attract

34%

of the total viewership— **a 50% drop from 2016**

Beauty influencers attract

3X more views

9X more engagements

than beauty brands on YouTube

The **Cross-Platform Story**
of Beauty and Personal Care

YouTube: **The Destination for Video Consumption**

Consumers turn to YouTube for video tutorials, tips, product reviews, and product teasers, as well as to connect with their favorite influencers. The platform is essential to invite consumers to lean in, driven by long video viewing sessions, and offers robust contextual targeting capabilities to shape brand and product awareness.

Facebook: **Cultivating Passionate Communities**

Facebook provides powerful audience targeting that can help marketers increase engagement among the platform's huge beauty and personal care communities, while the platform's engaging video ad products can help boost product consideration. In addition, the platform's robust live video capabilities offer brand marketers the opportunity to engage with their target audience through tutorials, product demonstrations, and launches.

Instagram: Rich Creative, Thumb-stopping Moments

Beloved by GenZ and millennials, Instagram is key to engaging the young, mobile audience. Instagram's visual-first design makes it well-adapted to share appealing creative content such as product visuals, behind-the-scenes footage, and live video during launches and events, and highlighting influencer partnerships.

Snapchat: Authentic Engagement and Innovative Ads

Snapchat's rich creative tools, from Sponsored Lenses, to Stories, and location-based geofilters allow brands to engage viewers in a playful and entertaining way, with the potential for a significant ripple effect of social sharing among the platform's young audience.

Twitter: Promoting Tent-pole Events and Building Customer Relationships

Twitter's specialized ad products allow advertisers to target against events, communities, followers, and even emojis, making it a compelling platform to build awareness, particularly around major industry events like Beautycon or fashion week.

How beauty and personal care stack up against other verticals

Figure 1: Global All-time YouTube Views *by Vertical*
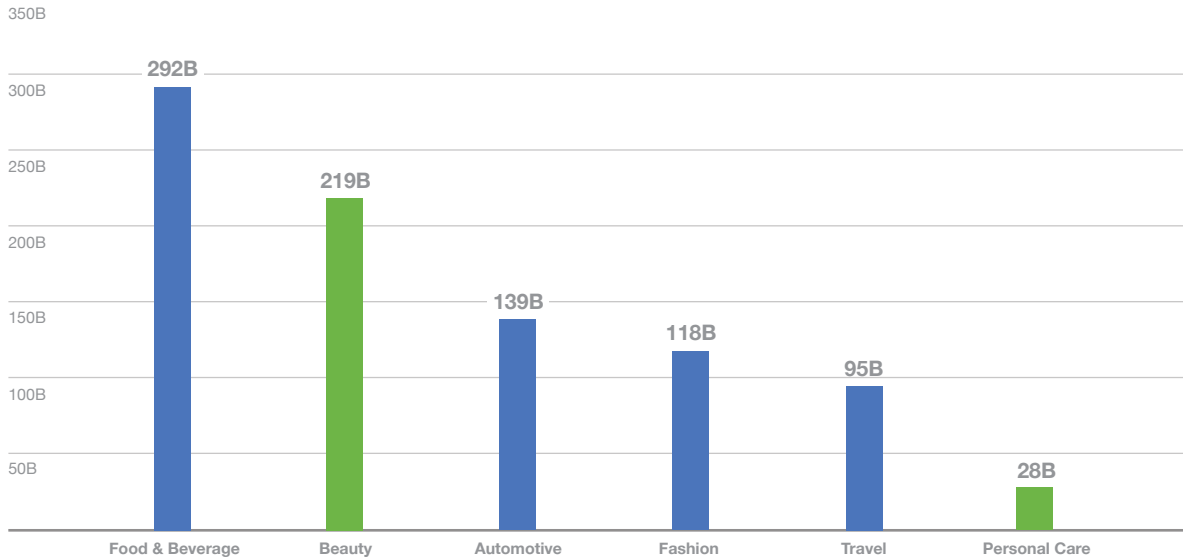
Source: Pixability Software, July 2017

The **Demographics and Viewing Preferences** of Beauty and Personal Care Consumers
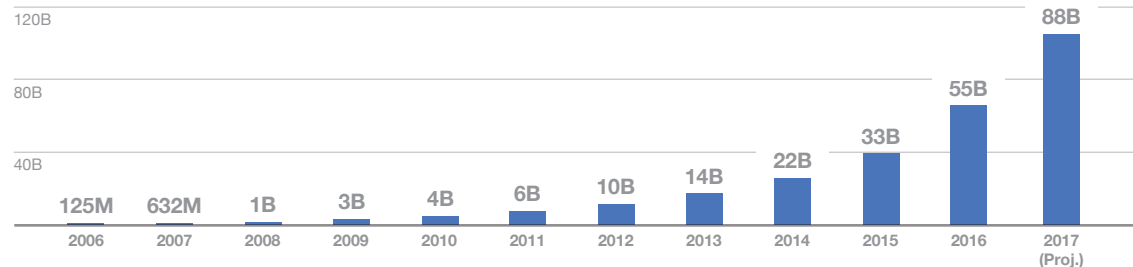
219B

total views of beauty videos on YouTube

72%

YoY increase in annual personal care views on YouTube

YouTube is a beauty powerhouse, attracting more than 219B total views of beauty videos. The space continues to grow rapidly, with annual beauty views increasing at a rate of 60% year-over-year. Pixability projects that consumers will view more than 88B beauty videos in 2017 alone. Consumers are also increasingly turning to YouTube for more than just their beauty needs — the personal care space has attracted 28M views total, with annual views increasing 72% year-over-year.

Figure 2: Annual Beauty Views *on YouTube*

Year	Views
2006	125M
2007	632M
2008	1B
2009	3B
2010	4B
2011	6B
2012	10B
2013	14B
2014	22B
2015	33B
2016	55B
2017 (Proj.)	88B

Source: Pixability Software, July 2017

The Overlapping Beauty and Personal Care Space *on YouTube*

Personal Care	Total views	YoY view growth
Overall	**28B**	**72%**
Deodorant	17B	63%
Body Care	16B	63%

Beauty	Total views	YoY view growth
Overall	**219B**	**60%**
Cosmetics	156B	59%
Hair	87B	53%
Skincare	73B	62%
Fragrance	24B	56%
Nails	4B	47%

Source: Pixability Software, July 2017

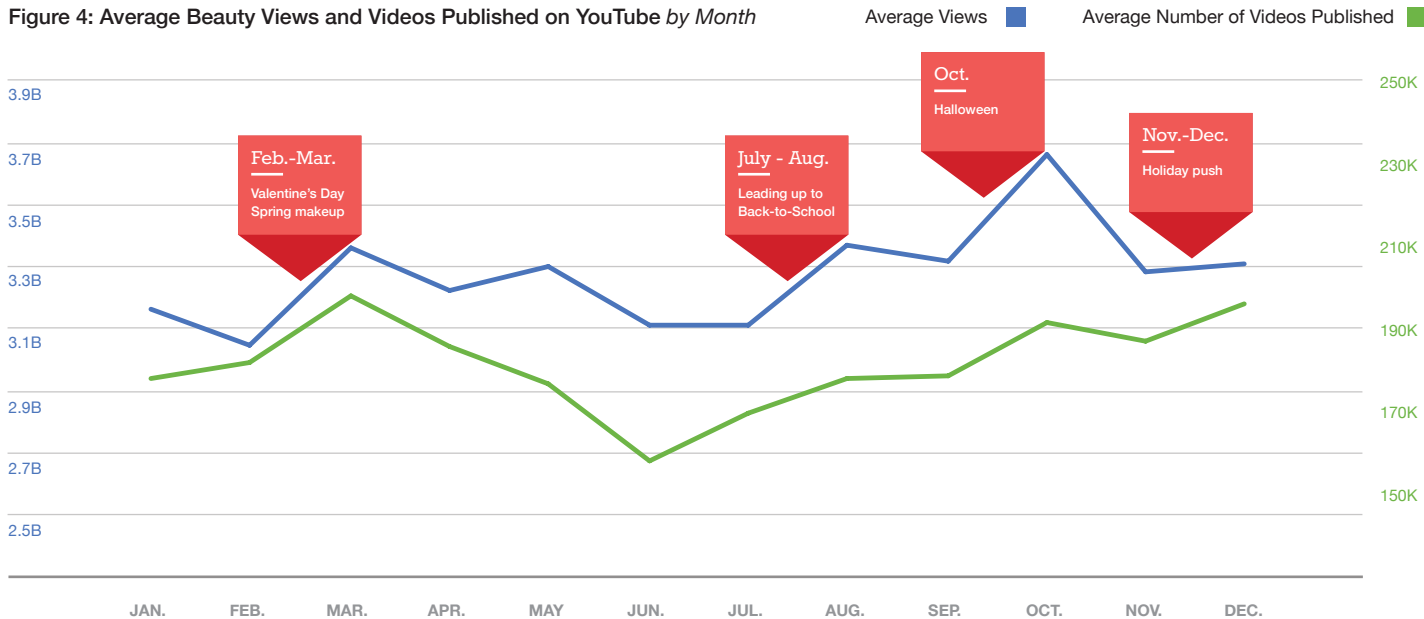## Consumers tune in year-round, and viewership jumps around holidays

Viewers are most often viewing beauty videos during Q3 and Q4, particularly around key events like back-to-school, Halloween, fashion week, and the holiday season. While beauty brands publish slightly more videos during these tentpole events, viewer interest regularly exceeds brand video production, particularly leading up to the event itself. This indicates that there remains a significant audience that's hungry for video content, and brands should meet that demand by increasing their publishing rate ahead of tentpole events.

Figure 3: Average Quarterly Beauty Views *on YouTube*
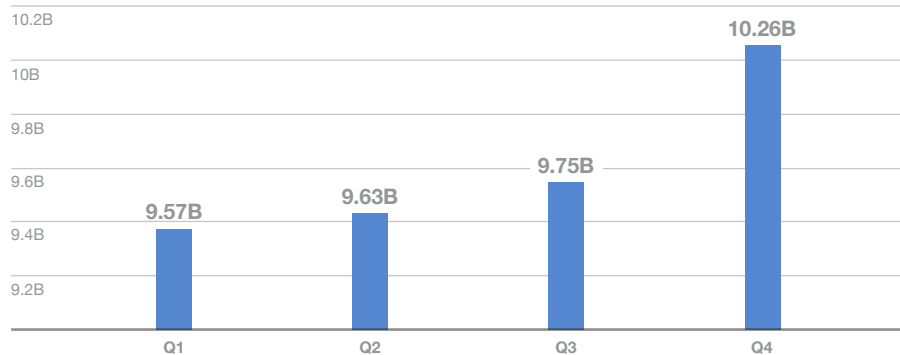
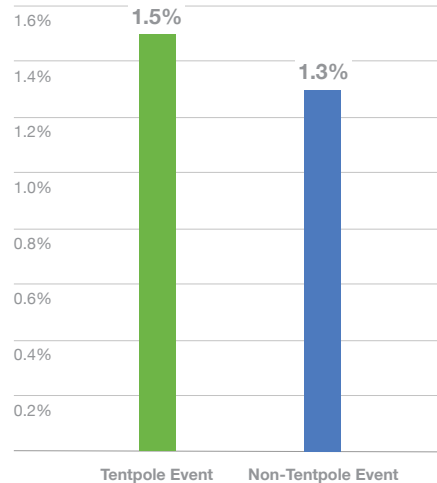Source: Pixability Software, July 2017

Figure 4: Average Beauty Views and Videos Published on YouTube *by Month*

Average Views ■   Average Number of Videos Published ■

Feb.-Mar.
Valentine's Day
Spring makeup

July - Aug.
Leading up to
Back-to-School

Oct.
Halloween

Nov.-Dec.
Holiday push

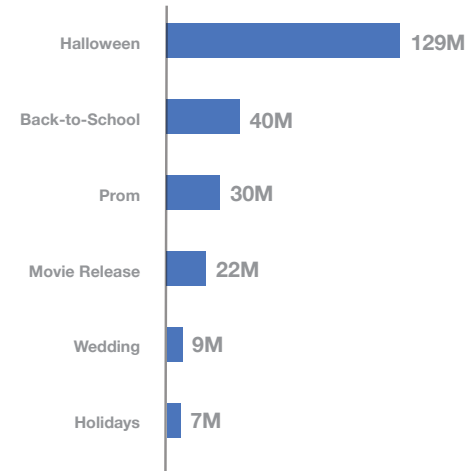Source: Pixability Software, July 2017

Across top beauty videos on YouTube, event-related content also attracts a 19% higher engagement rate on average than non-event content, and Halloween leads other tentpole events in viewership, followed by back-to-school videos. This significant increase in engagement and viewership indicates that brand marketers have an opportunity to make a deeper impact on audiences by increasing their investment in paid media leading up to and during seasonal events.

Figure 5: Tentpole Event vs. Non-tentpole Event Performance *by Avg. Engagement Rate on YouTube*

Source: Pixability Software, July 2017

Figure 6: Total YouTube Views *by Tentpole Event*

|	
Halloween	129M
Back-to-School	40M
Prom	30M
Movie Release	22M
Wedding	9M
Holidays	7M

Source: Pixability Software, July 2017

Long-form content is king on YouTube

Viewers are overwhelmingly seeking out long-form video content on YouTube. 46% of top beauty videos on the platform are between 5-10 minutes long, in sharp contrast with 15-second or 30-second campaign films that comprise the majority of brand-owned content. Brand-owned long-form content demonstrates a far superior average engagement rate than short-form content. Brands should follow influencers' example, and produce more long-form video content, tailor-made for digital consumption.

Figure 7: Top-performing Beauty Content *by Length*

Average Views ■   Engagement Rate ■
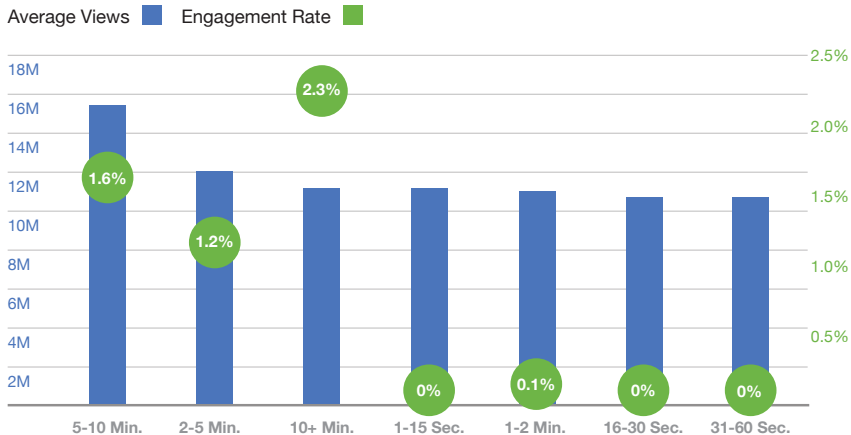
Source: Pixability Software, July 2017

Figure 8: Most-viewed Beauty Content on YouTube
by Video Length

■ 5-10 Min.   ■ 2-5 Min.   ■ 10 Min +
■ 16-30 Sec.   ■ 31-60 Sec.   ■ 1-15 Sec.
■ 1-2 Min.
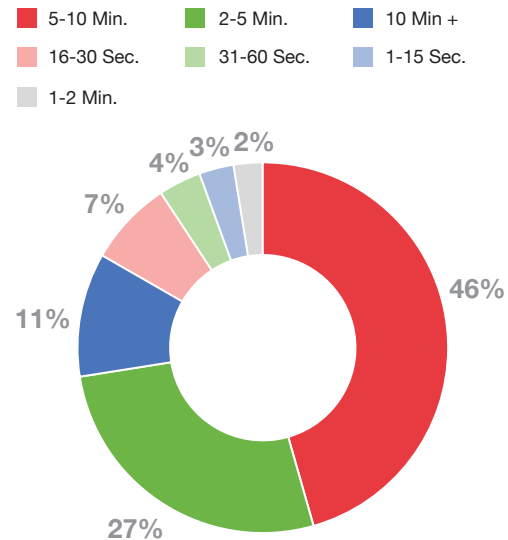
Source: Pixability Software, July 2017

Tutorials still lead top beauty content, but audience behavior is changing

In 2016, tutorial content generated 69% of total views across top beauty content on YouTube. However, this year, tutorials attracted only 34% of views across top beauty content — a dramatic drop — as viewers seek out different types of content. A rise in campaign film content is particularly notable, generating 17% of total views in the beauty space (compared to 7% in 2016), an indication of aggressive paid media investments by major beauty brands.

This year, campaign films generated the largest increase in engagement rates — 374% — mostly attributed to advertising support, the recent rise in influencer-led independent beauty brands (e.g., Makeup Geek, Kylie Cosmetics), and films with celebrity endorsements (e.g., Gwen Stefani, Zendaya).

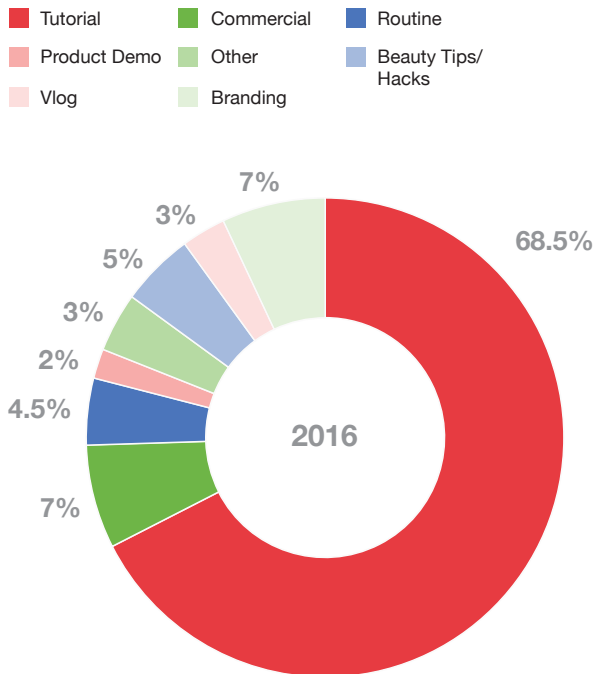## CLINIQUE

Brand Spotlight

YouTube Views: 31.2M

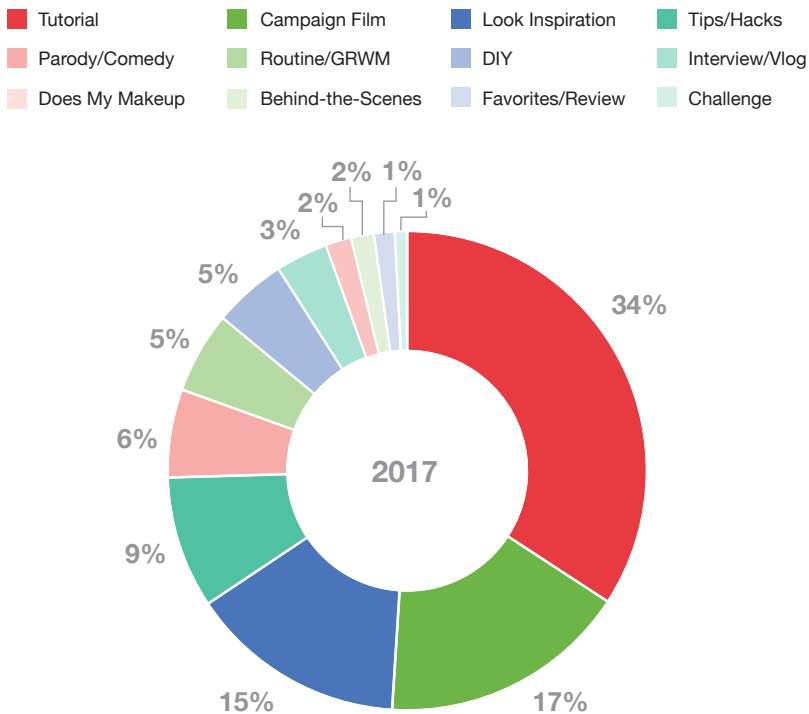**YouTube Subscribers:** 64K

Subscriber Growth: 21%

Clinique's YouTube video strategy focuses on publishing pragmatic content, like a guide to hiding wrinkles, or simplifying a beauty routine. The brand maintains a regular publishing cadence, releasing new tutorials every week.

Figure 9: 2016 Beauty Content Type Performance
by Share of Views

- Tutorial
- Product Demo
- Vlog
- Commercial
- Other
- Branding
- Routine
- Beauty Tips/Hacks

68.5%
7%
4.5%
2%
3%
5%
3%
7%

2016

Figure 10: 2017 Beauty Content Type Performance
by Share of Views

- Tutorial
- Parody/Comedy
- Does My Makeup
- Campaign Film
- Routine/GRWM
- Behind-the-Scenes
- Look Inspiration
- DIY
- Favorites/Review
- Tips/Hacks
- Interview/Vlog
- Challenge

34%
17%
15%
9%
6%
5%
5%
3%
2%
2%
1%
1%
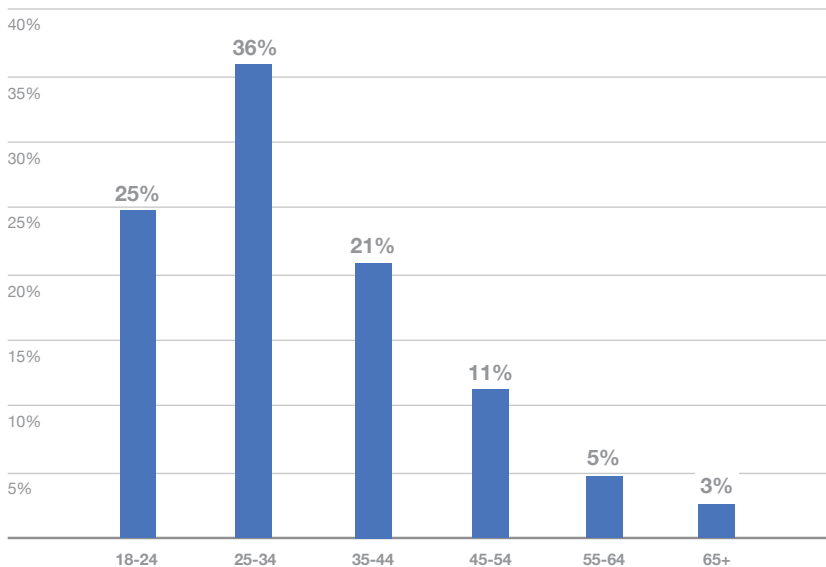
2017

# Understanding the beauty and personal care audience on Facebook

The beauty and personal care audience skews young and female on Facebook: over 60% of all people interested in these brands are millennials ages 18-34, and 84% of this audience is female.

Figure 11: Beauty Audience Distribution on Facebook *by Age*

Source: Pixability Software, July 2017

Figure 12: Beauty Audience Demographics on Facebook
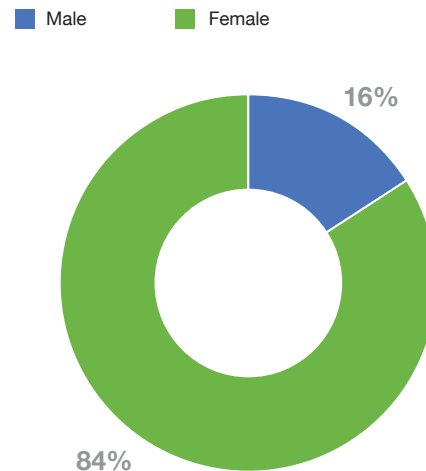
Source: Pixability Software, July 2017

Brushing up on beauty content types

The beauty community has developed its own unique blend of video content, and these content types are essential knowledge for marketers looking to understand which organic and paid strategies will resonate best with audiences. While the following content types are specific to the beauty space, there is overlap between prominent content types in the personal care space.

Does My Makeup
Showcases an influencer applying makeup to a subject, often another influencer, or the boyfriend or girlfriend of the influencer.

Behind-the-Scenes
Goes behind the making of a campaign film or another brand-owned video.

Campaign Films†
Promotes brand or product awareness through high production, highly-stylized video, typically around a campaign or launch.*

Challenge
Portrays influencers participating in a makeup challenge or competition.

DIY*
Instructs viewers on how to make beauty products at home.

Review/Favorites*
Reviews one or more beauty products, typically describing a recent haul or an influencer's favorite products or brands.

Vlog/Interview
Presents an influencer speaking to their audience or to an interviewer on a topic.

Look Inspiration
Displays a number of looks or styles to inspire viewers' beauty routines.

Parody/Comedy
Entertains viewers with beauty-related content, including popular reality vs. expectation sketches.

Routine/ Get Ready with Me
Walks through an influencer's beauty routine.

Beauty Tips/ Hacks
Presents pointers or solutions for beauty-related problems.

Tutorial*
Instructs viewers on the process to achieve a specific look or style.

† In previous iterations of Pixability's beauty study, campaign films were called commercials.

* Includes both beauty and personal care content.

How Brands Perform
Across Social Video Platforms

Leading beauty and personal care brands have recognized the impact of social video on consumers' brand preferences and purchase decisions, and have invested in engaging shoppers through video advertising.

While many leading beauty brands have historically invested primarily in a single video platform (generally YouTube, given its longer video tenure), more and more top beauty brands like CHANEL and Dior are meeting their audiences as they travel from video platform to platform. Particularly within the last year, consumers are increasingly extending their video viewing beyond just YouTube, and brands must adapt their video ad strategies to reach and engage their platform-hopping audience.

* Based on the top 314 beauty brands. See appendix for selection information.

† Based on the top 108 personal brands. See appendix for selection information.

‡ Estimates based on the top 2,000 channels ranked by all-time relevant views.

Beauty Brands*

4.6B Relevant Video Views, **25M** Subscribers
2% of views, 9% of channels‡

1.7B Relevant Video Views, **575M** Page Likes

509M Followers

118M Followers

Personal Care Brands†

475M Relevant Views, **1.9M** Subscribers
26% of views, 9% of channels‡

1.3M Relevant Video Views, **140M** Page Likes

4.3M Followers

2.8M Followers

In particular, Dior has found a large audience on Facebook through its overhauled video strategy, including a unique approach to video publication: the brand breaks out its campaign film videos into many short (10 to 15 second) videos as part of a series, building product and launch awareness without additional investment in video production.

While top brands are investing heavily in their Facebook video strategies, only 35% of the top 20 beauty and personal care brands on Facebook utilize at least a single video playlist on their video tab, and none of these brands take advantage of the maximum 10 playlists offered on the platform. By guiding consumers through a curated video experience, video playlists are an effective way to increase the length of viewing sessions and increase engagement.

Figure 13: Number of Video Playlists on Facebook *by Brand*
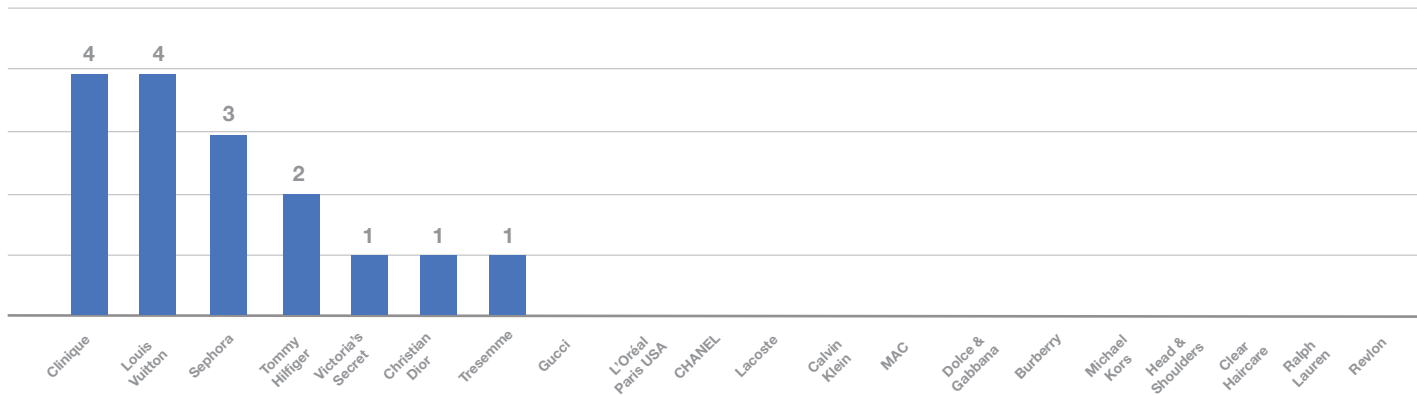
Source: Pixability Software, July 2017

Likewise, only 30% of the top 20 beauty and personal care brands on Facebook link out to other social video platforms. The consumer journey isn't confined to a single channel — as consumers move from platform to platform during their path to purchase, it's imperative that brands cross-link their social video pages. Brands should not only follow their audiences across platforms with paid media, but encourage users to engage with — and ideally share — their content across platforms. Sephora, for example, highlights its cross-platform presence by linking out to its Instagram, Twitter, and Snapchat channels, and even includes calls-to-action to drive engaged users to shop at its website.

SEPHORA
Brand Spotlight

Facebook followers: 16M

% of Facebook posts that are videos: 67%

Average engagements per post on Facebook: 5K

**Average Facebook posts per day:** 1

Sephora shares frequent updates on Facebook, partners with other brands for collaborative posts, and addresses user questions and comments to encourage user engagement. Additionally, Sephora drives viewership of its live video content through targeted advertising, and links out to its Instagram, Twitter, Snapchat, and Pinterest pages from its Facebook channel.

Section
03

Analyzing Influencers **Across Platforms**

Top beauty influencers are increasing their already-massive following on YouTube, topping the charts for largest subscriber growth. Yuya leads the beauty space in total subscribers, amassing a large viewership among the Spanish-speaking segment of the beauty audience, but creators like Rachel Levin, My Life As Eva, and Zoella are adding more subscribers at a faster rate.

Figure 14: Top Beauty Influencers on YouTube *by Total Increase in Subscribers*

Subscribers 1 Year Ago ■   Subscriber Gain ■   Subscriber Growth Rate ■
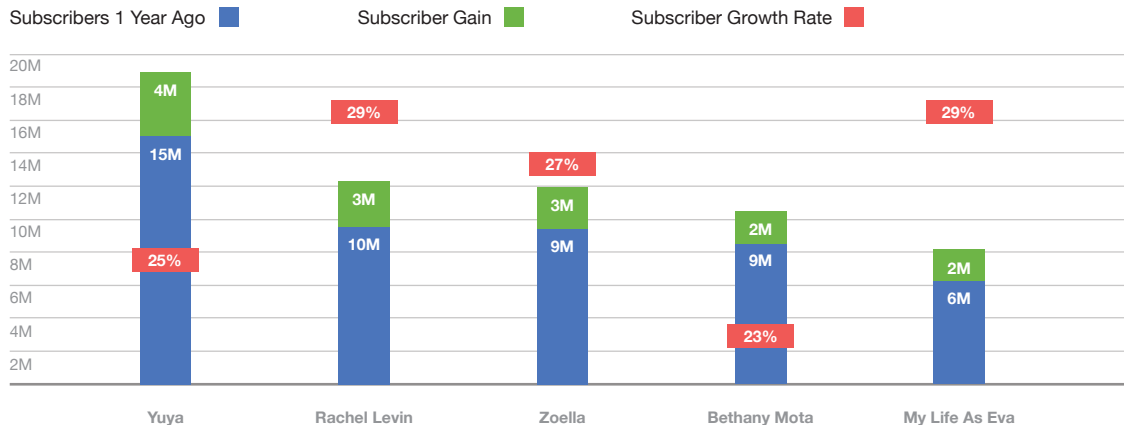
Source: Pixability Software, July 2017

The beauty space on YouTube continues to be dynamic, with influencer dominance changing dramatically from year to year. Brands need to keep pace with who is rising and who is waning in popularity in near real-time to ensure their influencer strategies are on point.

While in 2016 Pixability focused on global English beauty videos and channels, this year we've expanded our influencer rankings to include all global beauty channels. In 2016, Zoella ruled with the most subscribers, but this year Yuya takes the gold. Long-standing beauty influencer Michelle Phan removed a significant number of videos from YouTube in 2016 (not a recommended best practice), and also took a break from uploading — as a result, her total views have decreased.

> Brands need to keep pace with who is rising and who is waning in popularity in near real-time to ensure their influencer strategies are on point.

Brand vs. influencer vs. publisher video performance

On YouTube, influencers attract 3X more views and 19X more engagements than beauty brands, while publishers like Vogue and Refinery29 receive the highest engagement rate overall. Brands attract the highest average views per video, in large part due to paid media.

Brands attract the highest average views per video, in large part due to paid media.

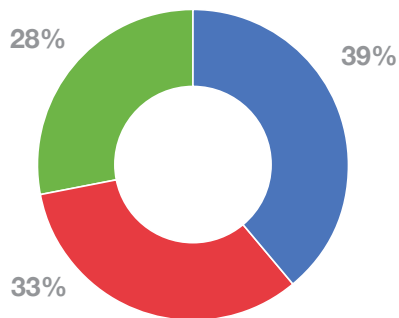**Figure 15: Top-performing YouTube Channel Type** *by Share of Total Views*

🔴 Influencer 🟢 Publisher 🔵 Brand

2%
26%
72%
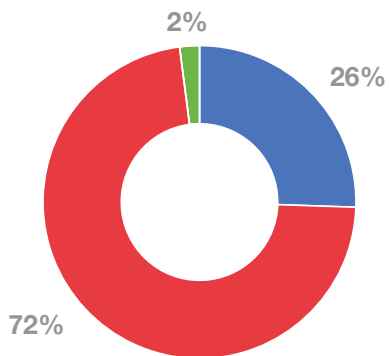
Source: Pixability Software, July 2017

Figure 16: Top-performing YouTube Channel Type *by Average Views per Video*

🔴 Influencer 🟢 Publisher 🔵 Brand

28%
39%
33%

Source: Pixability Software, July 2017

Figure 17: Most-engaging YouTube Channel Type

Publisher 1.9%	Influencer 1.7%	Brand 0.3%
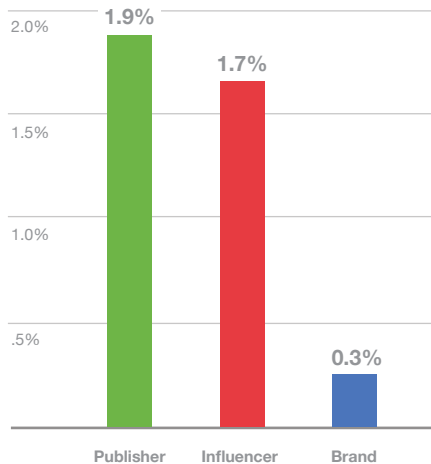
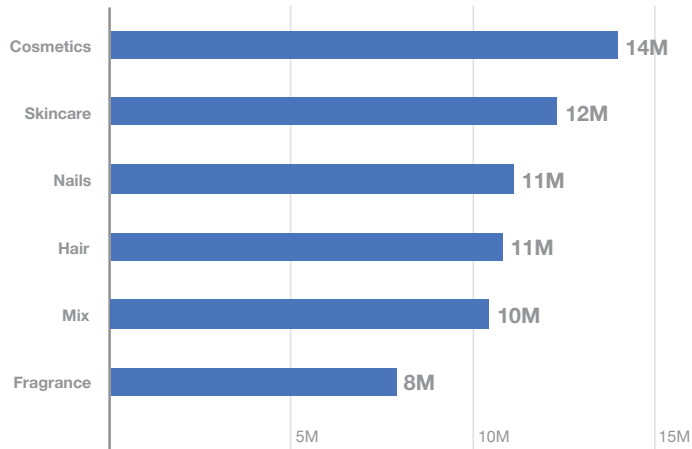Source: Pixability Software, July 2017

Among the top 200 most-viewed beauty videos on YouTube, cosmetics content attracts the largest viewership both in aggregate and on average, with 3X more total views than hair content. However, videos that cover a wide variety of beauty products — cosmetics, nails, skincare, etc. — attract the highest engagement rate on average.

Figure 18: Top-performing Beauty Content
by Product Type (Engagement Rate)

Product Type	Engagement Rate
Mix	2.0%
Cosmetics	1.5%
Skincare	0.9%
Hair	0.8%
Nails	0.3%
Fragrance	0.04%
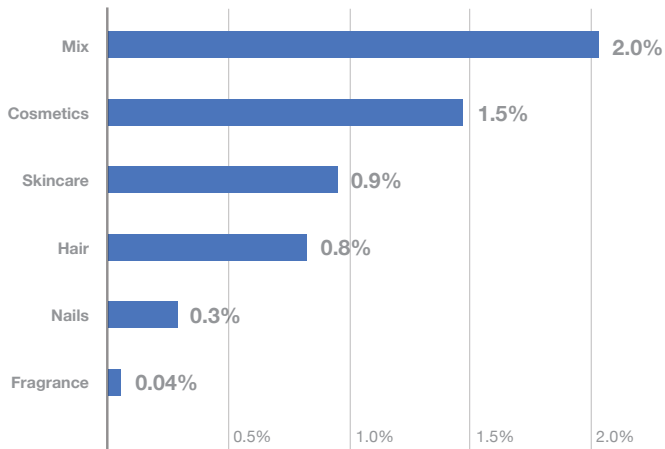
Source: Pixability Software, July 2017

Figure 19: Top-performing Beauty Content
by Product Type (Average Views)

Product Type	Average Views
Cosmetics	14M
Skincare	12M
Nails	11M
Hair	11M
Mix	10M
Fragrance	8M

Source: Pixability Software, July 2017

What's Next for Beauty and Personal Care **Across Social Video?**

Makeup for men

The men's grooming and male makeup markets are currently valued at more than $50 billion,* and the industry continues to expand as consumers break down traditional gender binaries. Pixability's data shows that views in the non-traditional beauty space (including male, transgender, or gender-nonconforming beauty) have grown sharply on YouTube — the space has amassed 1.3B views, with views increasing by a dramatic 807% from 2015 to 2016. Driven by the LGBTQIA community, emerging male beauty influencers, and innovative brands, this space is projected to continue to grow by 1.9B views in 2017.

Beauty brands have an opportunity to tap into this growing audience by creating products specifically for men, and working with male beauty influencers. For example, Maybelline's partnership with Manny Gutierrez (see sidebar on pg. 55), is one example of a major brand paving the way for a more inclusive beauty industry, and has positioned the brand on the forefront of this emerging market.

* Financial Times, "Made-up men reflect changing $50bn male grooming industry." February 2017.

Conclusion

The beauty and personal care space across social video platforms continue to evolve, with audiences developing distinct viewing behaviors and preferences, and influencers amassing large, dedicated followings across YouTube, Facebook, Instagram, Twitter, and Snapchat.

As consumers travel from video platform to platform, beauty and personal care brands must extend their video content and ad strategies across platforms in order to meet consumers along their digital path to purchase.

Each platform offers unique advertising opportunities — from innovative creative formats and ad products, to distinct audiences behaviors and targeting options — to help beauty and personal care brands stand out, and make an impact on the consumers that matter most to them.

Want more insights on the beauty and personal care audience across social video?
Get in touch with us today to receive the full report.

info@pixability.com
888.749.8433
www.pixability.com

Section
05

Report Methodology

YouTube

Pixability's software collected all-time data on YouTube beauty videos from over 1.1 million beauty channels from YouTube's Data API, focusing on the top 200 beauty videos within the following content categories: Tutorial, Campaign Film, Look Inspiration, Tips/Hacks, Parody/Comedy, Routine/GRWM, DIY, Interview/Vlogs, Does My Makeup, Behind-the-Scenes, Favorites/Reviews, and Challenges. The analysis was further refined to include the top 314 beauty brands — selected based on the criteria within the L2 Digital IQ Index: Beauty US 2016 report, expanded to include relevant brands investing in digital video across the cosmetics, hair, nails, fragrance, and skincare sub-categories — and the top 108 personal care brands — selected based on the criteria within the L2 Digital IQ Index: Personal Care 2017 report.

Metrics analyzed include:

- Number of videos per channel
- Number of channel subscribers
- Number of views, comments, likes, dislikes, and Facebook shares per video

Global channels with a predominantly English-language YouTube presence were included in Pixability's analysis. Brands with a YouTube presence exclusively or primarily in a language other than English, or based outside of the US and Europe, were excluded from this study.

All insights are based on data from Pixability's Video DiscoverAbility insights platform. The platform harvests data about YouTube videos from the YouTube data API, search API, and other relevant sources. Pixability's software is fully cross-platform, and can analyze the difference in performance between native videos on YouTube, Facebook, Instagram, and Twitter. Video data is combined with sharing information on other platforms such as Facebook, using the relevant public APIs that these platforms provide. Videos are analyzed based on a number of features, including metadata processing (title, description, tags), comment analysis, and tracking of time series using historical data collected over the last two years. Topic spaces are defined by lists of keywords that can be combined in multiple layers (e.g. base keywords describing a topic combined in Boolean OR plus an overlay of required keywords, such as a brand name). Data sets are further analyzed by YouTube-certified analysts.

Pixability is a member of YouTube's Measurement Program (YTMP). This certification program ensures that companies using the YouTube API Services are providing consistently verified YouTube measurement data. Pixability is one of the first five technology companies to be granted the seal of approval to participate in the program, a result of a certification process performed by Google. As a member, Pixability's proprietary video metrics derived from YouTube's data are confirmed to carry the highest quality methodology, accuracy in calculations, and clarity in metric definitions. Please find further details on Google's webpage.

YouTube views can be organic or ad-supported. Organic YouTube video views reflect how many times a video has been watched. Keep in mind that YouTube is constantly validating views, so view count can be adjusted. An ad view on YouTube is counted when someone watches 30 seconds of a video ad (or the duration if it's shorter than 30 seconds) or interacts with the ad, whichever comes first.

The Predicted Paid Views Percentage is calculated using a proprietary method Pixability developed over several years. It is based on a machine learning algorithm (Random Forest regression) that takes into account a set of 23 data signals about every single video on each observed channel. These signals include factors like engagement levels, sharing behavior, view development over time, video metadata and other video properties (such as length) that we have identified in our model as being highly predictive of paid vs. organic ad spending. The machine learning model calculates the predicted number of paid views on each individual video and then aggregates it on a channel level to get to the overall percentage of paid views for a channel. We are constantly testing this algorithm against client channels to which we have access and have found it to be accurate within a +/-5% range in almost all cases.

Facebook

Pixability harvests proprietary data on brand and topic conversations on Facebook within Facebook Audience Insights and public API data on Facebook Pages.

A view is counted on Facebook when a video is viewed for 3 seconds or viewed to the end. This definition applies on both organic videos and paid media.

Instagram

Pixability harvests proprietary data on brand and topic conversations on Instagram based on hashtags. With Pixability's proprietary Instagram data, we can provide brand- and country-specific feedback on what is popular and well-liked on Instagram by profile and region to see best practices, trends and opportunities for brands. Pixability starts with a topic space defined by the hashtags to begin the data-harvesting process.

Twitter

Using Twitter's Search API and public profile data, Pixability analyzed tweets and other engagements to identify publishing trends and top Twitter handles.

Snapchat

All Snapchat data included is publicly accessible.

About Pixability

Pixability is a video advertising technology company that helps media professionals deliver outstanding campaign performance across YouTube, Facebook, Instagram, Twitter, Snapchat and Spotify. Advertisers use Pixability's software to activate video at every stage in the consumer journey. Pixability provides sophisticated targeting, automated media execution, and verifiable viewability and placements across premium video platforms. Pixability is headquartered in Boston with offices in New York, San Francisco, Chicago, and London.

Get in touch.

info@pixability.com

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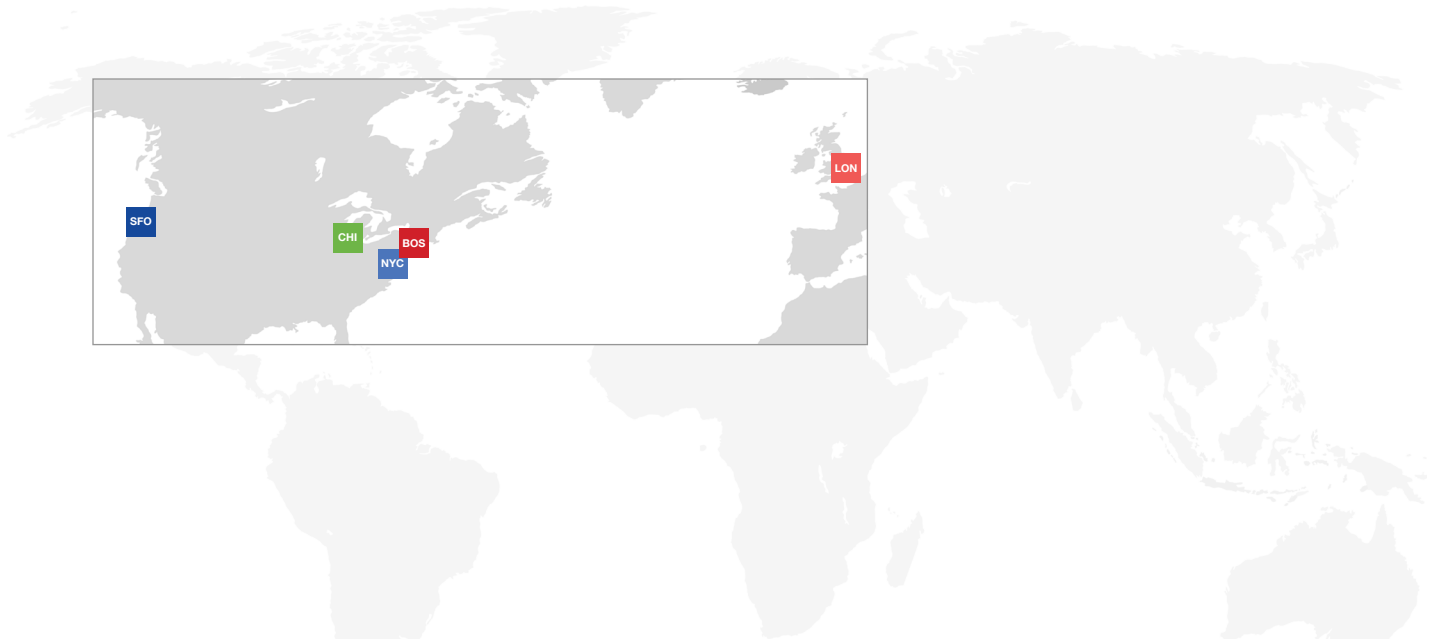
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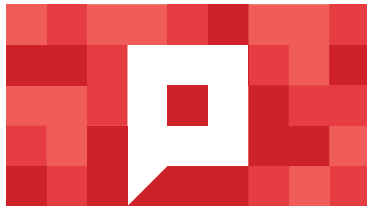135 W. 50th St.
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