



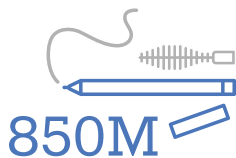
2016

Digital Makeover:

The Social Video Beauty Ecosystem

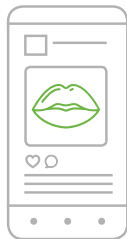


Copyright 2016. Pixability, Inc. All rights reserved.



850M

total Facebook video views of the top 200 beauty brands



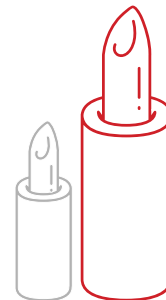
Top niche beauty hashtags:

#instabeauty
#beautyblogger



100M

hours of daily video watch time on Facebook



Zoella rules the beauty kingdom with

10.9M+ subscribers

150%

increase in the total time spent watching video on Instagram in the first half of 2016 alone



65%

increase in total beauty views on YouTube year-over-year

CHANEL

leads all-time YouTube views with

245M

SEPHORA

leads total YouTube subscribers with

620K

VICTORIA'S SECRET

leads total YouTube engagements with

2.1M

OLAY®

leads all-time video views on Facebook with

212M

VICTORIA'S SECRET

leads total followers on Instagram with

43M

65%

year-over-year
increase in total
beauty views
on YouTube

850M

total Facebook video
views of the top 200
beauty brands

125B

views of beauty-
related content
on YouTube

The beauty space continues to be one of the most dynamic on YouTube,

with a sophisticated and influential creator community, and a massive — and constantly diversifying — amount of brand-owned and user-generated content. But now, consumers are also turning to Facebook, Instagram, Twitter, Snapchat, and Pinterest to find and share beauty videos.

The growth on YouTube alone is dramatic, with a 65% increase in total beauty views year-over-year, and the ecosystem shows no signs of slowing down. As the online video landscape gets even richer and more complex, the opportunity for beauty marketers has never been greater, with the emergence of new high-performing video advertising formats across YouTube, Facebook, Instagram, Twitter, Snapchat, and Pinterest.

The proliferation of beauty-related videos online has a significant impact on purchase decisions, with beauty consumers increasingly turning to video to shape their brand preferences over traditional web search.

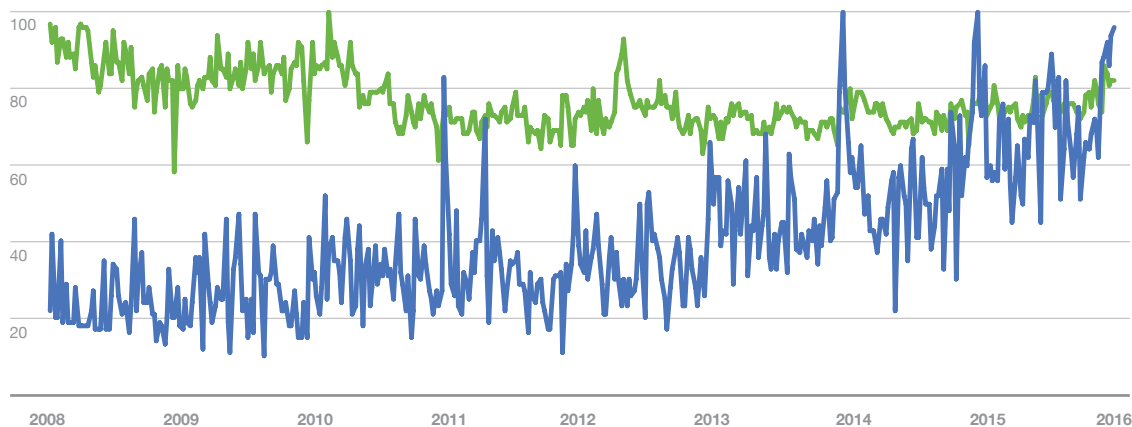
Beauty influencers who built their loyal subscriber base on YouTube are now cultivating their fan relationships across other social video platforms as well. Beauty brands must follow suit, with cross-platform content and advertising strategies to meet beauty consumers where, when, and how they consume beauty content.

Each video platform presents its own unique opportunities to advertisers — from Snapchat’s ephemeral videos, to Twitter’s real-time, event-based content — and beauty marketers must understand the differences in order to build effective video campaigns that resonate with beauty consumers.

In this report, Pixability explores the beauty ecosystem across select premium video platforms, with analysis of leading and emerging brands, creators, and content categories, and illuminates how marketers can harness the strengths of each video platform to connect with today’s digital beauty mavens.

Figure 1: Google vs. YouTube Search Interest Over Time for “Beauty Products”

YouTube  Google 



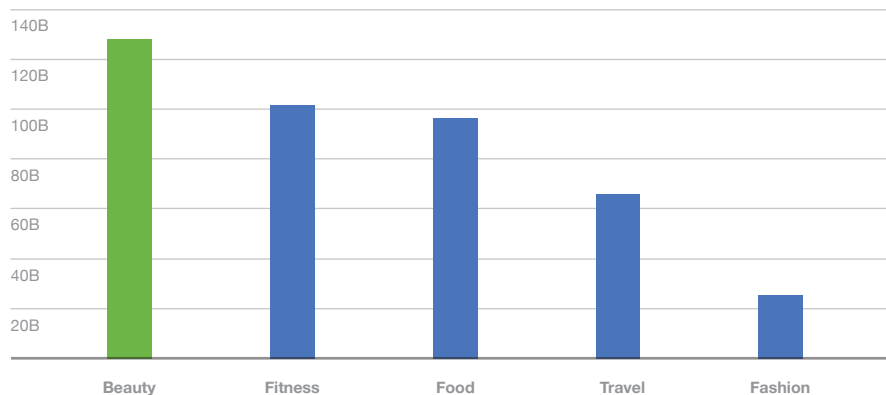
Source: Google Search Trends, January 2016

Section 01

Beauty on YouTube

YouTube has long been the leading online video hub for the beauty space. Beauty creators have built passionate fan bases — Zoella rules the beauty kingdom with a whopping 10.9M+ subscribers — feeding viewers with content that compels them to consistently return for more. While other social video platforms are investing heavily to lure top creators onto their platforms, the loyal and hard-earned subscribership that creators enjoy on YouTube cannot yet be beat.

Figure 2: Total Relevant Views on YouTube by Industry *in Billions*



Source: Pixability Software, June 2016

125B

Views

5.3M

Videos

525K

Channels

The YouTube beauty audience is 75% female, and females 13-24 make up 47% of it. That's a demographic that's becoming increasingly difficult to find on linear television or at the beauty counter; YouTube can help beauty brands reach and engage these savvy digital natives.

Pixability's annual analysis of the beauty space on YouTube — which has amassed 125B total beauty-related views as of June 2016 — provides an in-depth look at how the dynamic space is changing year-over-year. Pixability's proprietary campaign data (based on more than 140 beauty brand channels) shows that in 2016, 81 percent of views on brand-owned channels were paid views generated via TrueView advertising.

Figure 3: Changes in Performance of Beauty-Related Content on YouTube
March 2015 & June 2016

	March 2015	June 2016	% Change
Total beauty-related videos	1.8M	5.3M	200%
Total beauty-related video views	45.3B	125B	176%
Monthly views of beauty-related videos	1.6B	5B	213%
Total beauty channels	215K	525.5K	144%
Total likes	586.8M	1.5B	156%
Total Facebook shares	169.1M	259M	53%

Source: Pixability Software

Section 02

850M

total views of the top
200 beauty brand
Facebook pages

100M

hours of daily
video watch time
on Facebook

Beauty on Facebook

Though YouTube has long served as the video hub for the beauty space, Facebook is aggressively investing in video and making powerful strides to become a video-first platform. Facebook reports 100 million hours of daily video watch time (as of Jan. 2016), and has been regularly rolling out new video features and capabilities to support advertisers.

Beauty influencers are now cultivating their fanbases on Facebook too, and smart beauty brands will take advantage of Facebook's powerful video ad types to reach and engage beauty consumers.



Figure 4: Top 25 Beauty Brands on Facebook by Video Views

Rank	Brand	Views	Rank	Brand	Views
1	Olay	211.8M	14	Max Factor UK	11.3M
2	CHANEL	84.5M	15	Wella Professionals	11M
3	Benefit Cosmetics	61.8M	16	John Frieda US	10.3M
4	Head and Shoulders	46.2M	17	Clinique	10.2M
5	HUGO BOSS	28.6M	18	Revlon	10.2M
6	Gucci	25.6M	19	Bulgari	9.7M
7	Burberry	25.5M	20	BIRCHBOX	8.9M
8	Dior	24.6M	21	COVERGIRL	8.8M
9	Aussie	14.9M	22	Clearasil US	8.7M
10	OGX Beauty	14.5M	23	SEPHORA	8.7M
11	Victoria's Secret	14.5M	24	SK-II Singapore	8.1M
12	Herbal Essences	14M	25	Anastasia Beverly Hills	7.9M
13	Maybelline New York	13.7M			

Source: Pixability Facebook Data, July 2016

Section 03

150%

increase in the total
time spent watching
video in the first half
of 2016 alone

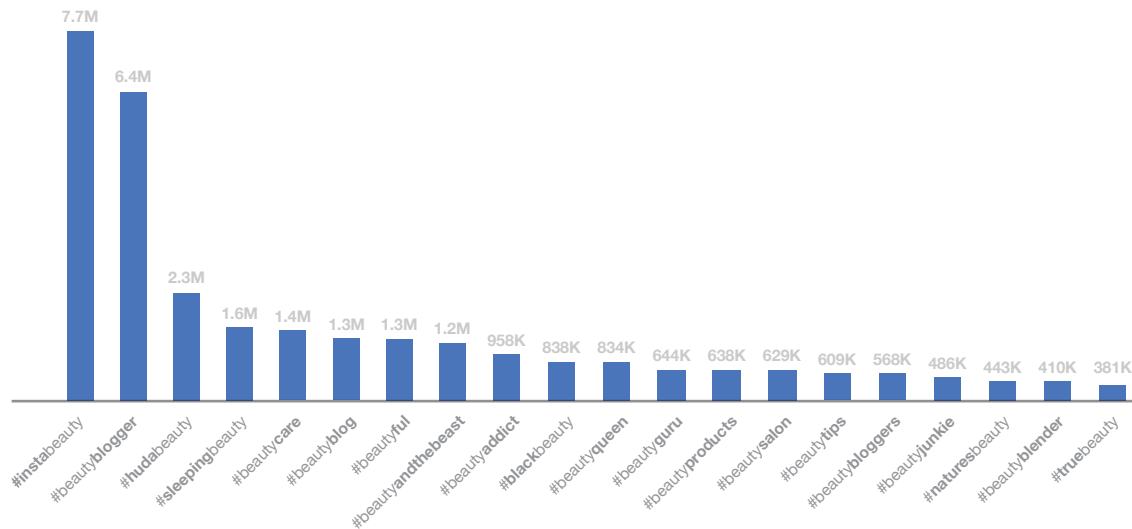
Beauty on Instagram

Instagram's design encourages users to scroll through their feeds, and historically has made user behavior more conducive to consuming photos, rather than interrupting the scroll to watch a video. That user behavior is fast changing though, and Instagram reports a 150% increase in the total time spent watching video in the first half of 2016 alone. According to Pixability's analysis, Instagram videos generate 2.4X more comments than photos on average. As Instagram continues to roll out more video-centric features, the medium will only become more essential in every beauty brand's media mix.

#beauty

Organic discoverability of Instagram content is driven by hashtags. As expected, #beauty is used most on beauty-related Instagram content around the world, but of the top niche hashtags, #instabeauty and #beautyblogger lead on Instagram videos. #instabeauty, made up largely of selfies and product shots, dominates, with 20 percent more uses than #beautyblogger.

Figure 5: Instagram Beauty Posts by Hashtag



Source: 2016 Data from Instagram API, as of Aug. 2016

Section 04

Beauty on Twitter

Twitter is the platform for advertisers who want to capture viewer attention during a particular event, with user behavior focused on real-time sharing and immediacy. To maintain that dominance and gain market share in video, Twitter has made a significant investment in livestreaming.

Beauty marketers can capitalize on the engagement opportunities Twitter offers around major events like fashion shows or photo shoots, by sharing behind-the-scenes videos live, and by targeting ads against relevant hashtags, like #NYFW.

Unique to Twitter, beauty marketers can also target ads at followers of top beauty influencers, like Kylie Jenner's 18M followers, exposing their brand message to a highly relevant audience at scale.

Unique to Twitter, beauty marketers can also target ads at followers of top beauty influencers, like Kylie Jenner's 18M followers...

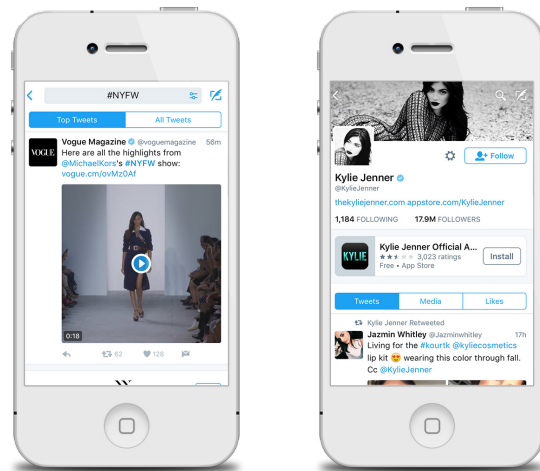


Figure 6: Top 25 Beauty Brands on Twitter by Number of Followers

Rank	Brand	Followers	Rank	Brand	Followers
1	CHANEL	12M	14	Ralph Lauren	2M
2	Victoria's Secret	10M	15	Kat Von D	2M
3	Burberry	7M	16	Jean Paul Gaultier	1M
4	Christian Dior	7M	17	MAC Cosmetics	1M
5	Marc Jacobs	7M	18	Lacoste	961K
6	Dolce & Gabbana	4M	19	Urban Decay Cosmetics	847K
7	GUCCI	3M	20	Givenchy Beauty	770K
8	Michael Kors	3M	21	NYX Professional Makeup	634K
9	Calvin Klein	3M	22	HUGO BOSS	610K
10	Versace	3M	23	COVERGIRL	590K
11	GiorgioArmaniBeauty	3M	24	DKNY	563K
12	Forever 21	2M	25	Bulgari	556K
13	Sephora	2M			

Source: Pixability Twitter Data, June 2016

**Section
05**

The Perfect Blend:

Cross-Platform Campaigns

Different Strengths for Each Platform

Each video platform has its own distinct strengths, and beauty marketers must understand the differences to build effective content and advertising strategies. Consumers continue to turn to YouTube as their primary source for creator content, and beauty tutorials specifically, but are increasingly spending time with brand and user-generated beauty videos on Facebook, Instagram, Twitter, and Snapchat. User adoption remains to be seen on Pinterest's conversion-enticing video experience.

Engagement options differ on each platform — whether it's liking, sharing, commenting, subscribing, following, clicking through to purchase, or watching related videos — and assets must be tailored appropriately depending on the platform's unique specifications.

Section 06

Conclusion

The beauty ecosystem across video platforms is dynamic, and only getting more complex. As creators expand their influence from YouTube to Facebook, Instagram, Twitter, Snapchat, and Pinterest, beauty brands must follow suit, and meet audiences where, when, and how they consume beauty content online.

Major beauty brands and challenger brands alike should experiment with new ad formats and features across video platforms to capture audience viewership.

By understanding the unique advertising offerings of each social video platform; recognizing up-and-coming influencers, underserved audience segments, and emerging content categories; and experimenting with immersive experiences like livestreaming and augmented reality, beauty marketers can create engaging video experiences for the millions of passionate beauty mavens around the world.

Who
are
we?

About Pixability

Pixability is a video advertising technology company that helps media professionals deliver outstanding campaign performance across YouTube, Facebook, Instagram, and Twitter. Pixability's solution empowers advertisers to activate video at every stage in the consumer journey in order to deliver impactful business results. 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.

To access the full 2016 Beauty Study, email us today.

info@pixability.com

888.749.8433

www.pixability.com



PIXABILITY

Boston | New York | Chicago | San Francisco | London

Copyright 2016. Pixability, Inc. All rights reserved.