

BEAUTY ON YOUTUBE // 2015

Report by  pixability





The Beauty Ecosystem on YouTube

45.3 Total Beauty Video Views

Billion

2.1 Billion Brand-owned Video Views

55% of beauty views come from mobile devices

Hair videos account for **92%** of men's grooming views

586,812,159 Likes

22,604,294 Dislikes

215 Beauty Brands

23,938,920 Tweets

f 169,068,125 Facebook Shares

8.7 million subscribers

Bethany Mota (macbarbie07) is YouTube's top beauty content creator



50% Growth rate the beauty space experienced from 2014-2015

123,164,115 Total Beauty Subscriberships

182,621 Beauty Creator Channels

1,783,935 Total Beauty Videos on YouTube

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Executive Summary

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YouTube's beauty ecosystem experienced a 50% growth rate in views from January 2014 to April 2015, resulting in a lifetime total of 45.3 billion beauty views.

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Last year, Pixability published *Beauty on YouTube: How YouTube is Radically Transforming the Beauty Industry and What That Means for Brands*. The findings contained in **Pixability's 2014 Beauty on YouTube study became a call to action for many of the world's leading beauty brands**, who were surprised to discover that independent beauty content creators on YouTube were far more successful at attracting an audience, engaging subscribers, and owning the conversation around branded products on YouTube than they were.

Over the past 12 months, a variety of global beauty brands have worked to increase audience engagement on their official YouTube channels, identify and partner with leading content creators, and improve their videos' overall performance on YouTube. **Viewership of brand-produced beauty content on YouTube grew 35% faster than the overall beauty industry from January 2014—April 2015** partly because of a strategic blend of paid advertising campaigns, critical organic optimizations, and content creator sponsorships.

Beauty on YouTube 2015 presents the latest YouTube beauty trends and findings extracted from Pixability's YouTube software. **This study analyzes the YouTube practices of 215 beauty brands and 182,621 independent YouTube beauty creators who create YouTube videos focused on makeup, skincare, hair, nails, and perfume.**

With 45.3 billion total beauty views and over 123 million total beauty subscriberships, YouTube remains the world's leading online beauty video consumption platform. However, its beauty ecosystem continues to evolve rapidly in terms of:

- The **quantity and variety of beauty content** available on YouTube.
- The **changing composition of the audience** watching beauty content on YouTube.
- The **amount of advertising dollars** being invested in YouTube beauty content.
- The **shifting rankings of specific beauty creators** according to reach and influence.

According to *eMarketer*, **US advertisers will spend a total of 7.77 billion dollars on digital video** by the end of 2015.¹ The aim of Pixability's *Beauty on YouTube 2015* study is to equip beauty brands and their agencies with the insights they need to efficiently and effectively:

- **Develop a data-driven paid advertising approach** to YouTube.
- **Identify and partner with high-influence beauty creators on YouTube.**
- **Attract and expand their audience** via emerging high-growth beauty segments on YouTube.

1. eMarketer. April 16, 2015. <http://www.emarketer.com/Article/US-Adults-Spend-55-Hours-with-Video-Content-Each-Day/1012362>

Pixability's analysis of the 2015 beauty ecosystem on YouTube produced the following findings:

The diversity of YouTube's beauty content and consumption habits continues to grow

- Beauty on YouTube experienced a **50% growth rate** in views from January 2014—April 2015.
- YouTube's **1.8 million beauty videos** have attracted a total of **45.3 billion views**.
- **55%** of YouTube's beauty video views occur on **mobile devices**.

YouTube's beauty creator A-List is changing

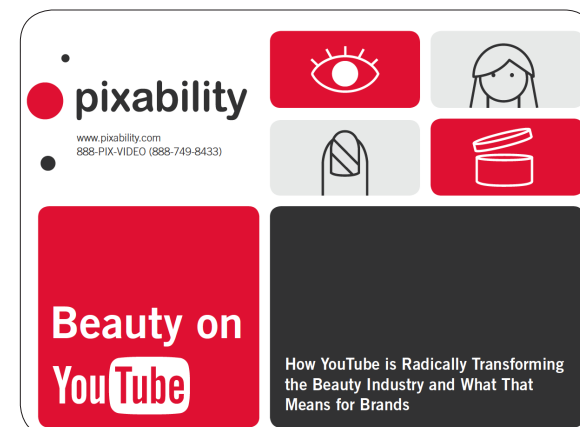
- More than **180,000 beauty creators** publish original beauty videos to YouTube.
- **macbarbie07** is now YouTube's number-one beauty creator with **8.7 million channel subscribers**.
- **MichellePhan's monthly views have declined** from 25.5 million views per month in 2009 to a **3-year low** of 15 million views per month in 2015.
- Second generation beauty creators **MyLifeAsEva** and **maybabytumbler** have grown their channel subscriber bases **1,982%** and **960%** respectively from January 2014—April 2015.

Beauty brands are increasing YouTube advertising spend to catch up to creators

- **Views of brand-produced beauty content** on YouTube grew **35% faster** than views of overall beauty content on YouTube from January 2014—April 2015.
- **Mentions of beauty brands** on YouTube **increased 53%** from January 2014—April 2015.
- Total **monthly views of brand-produced content increased 78%** from January 2014—April 2015.
- **Ten of the top 25** most-viewed beauty videos published in the first four months of 2015 were **produced or sponsored by beauty brands**.

Emerging content categories hold critical growth opportunities for beauty brands

- Monthly views of videos featuring **beauty solutions for mature consumers over the age of 45** are growing **62% faster** than YouTube's overall beauty space.
- The **top ten men's grooming channels** on YouTube collectively hold **5.4 million channel subscriberships**—4.4% of YouTube's 123 million beauty subscriberships.
- **Body makeup videos**, which cover topics like using makeup to better define abdominal muscles, receive **7%** of YouTube's top beauty video views.
- **Cross-over beauty content** such as Beauty + Comedy or Beauty + Fashion videos earn **530% more views** per video and **670% more Facebook shares** per video than beauty-only video content.



Additional best practices for beauty brands can be found in Pixability's 2014 Beauty on YouTube study, available at <http://pixability.com/beautystudy>.



YouTube beauty creator **macbarbie07** (Bethany Mota) has the most subscribers of any beauty channel.

YouTube's Expanding Beauty Ecosystem

YouTube's Beauty Space Statistics as of April 2015

182,621 Beauty creator channels	1,783,935 Beauty videos
123,164,115 Beauty channel subscriberships	215 Beauty brands
2.1 Billion Brand-owned video views	586,812,159 Total Likes
45.3 Billion Total beauty views	169,068,125 Total Facebook shares
	23,938,920 Total Tweets

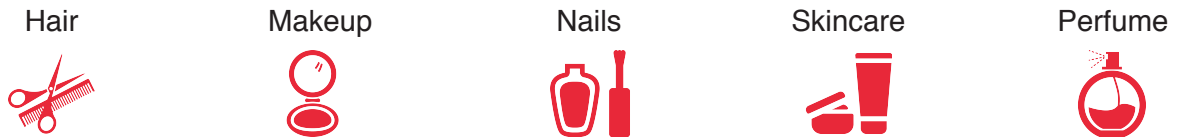
The diversity of YouTube's beauty content and consumption habits continues to grow

YouTube remains the world's leading online beauty video consumption platform. As beauty brands and content creators continue to flock to YouTube, evolving video categories, audiences, and consumption habits are rapidly redefining YouTube's beauty ecosystem.

As of April 2015, YouTube's **1.8 million beauty videos** have attracted **45.3 billion total views**.

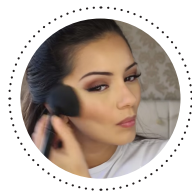
- YouTube has **123,164,115 beauty channel subscriptions**.
- **89%** of YouTube's beauty audience are female; **11% are male**.
- YouTube beauty content has earned **586,812,159 Likes**.
- YouTube beauty content has been **shared on Facebook 169,068,125 times**.
- YouTube beauty content has been **tweeted a total of 23,938,920 times**.

For the purposes of this study, *beauty content on YouTube* includes these five topics:



YouTube's beauty content is grouped into the **18 beauty video subcategories** shown in Figure 1 on the following page. Beauty brands play different roles within each subcategory, dominating some categories while maintaining almost no presence within others.

18 Most Common Beauty Video Subcategories on YouTube



Tutorial

A detailed step-by-step video that instructs the viewer how to achieve a specific beauty look.



Product Demo

A video showing how a product works.



Haul

A video showing the contents of a recent purchase of products.



Commercial

A professional advertisement made to promote a specific brand or product; typically a high-production-value video.



Routine

A video following the creator through a portion of a typical day.



Hair

A tutorial on how to style, arrange, or otherwise take care of hair.



Commentary

A video in which the creator speaks to the audience about their opinions on a topic. Often humorous or informative.



Look

A video in which the creator shows a beauty look, but does not explain or demonstrate how to achieve it.



Story

An inspirational video revolving around a specific event, story, or message; often produced by a beauty brand.



News

A news clip featuring a beauty product or brand.



Men's Grooming

A beauty video targeted toward men and produced by a brand or creator.



Costume

A video about how to achieve a specific costume look, often referencing Halloween.



Body

A tutorial that teaches the viewer how to change the appearance of her body or skin; includes effects for Halloween.



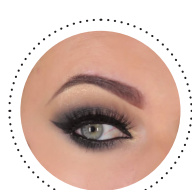
Nails

A tutorial on how to paint or otherwise decorate nails.



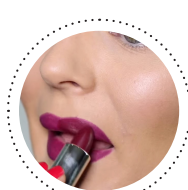
Get Ready With Me

A video that follows a creator through her daily routine.



Makeup – Eyes

A makeup tutorial focused on the eyes only.



Makeup – Lips

A makeup tutorial focused on the lips only.



Makeup – Face

A makeup tutorial that focuses not on one particular feature, but rather on how to transform the entire face.

Figure 1. YouTube's beauty ecosystem includes 18 subcategories of beauty video content.

The YouTube Beauty Video Ecosystem

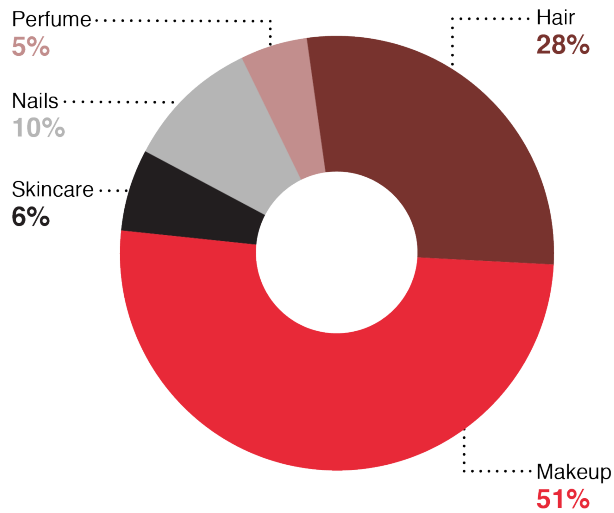


Figure 2.
YouTube's beauty ecosystem consists of 51% makeup videos, 28% hair videos, 10% nails videos, 6% skincare videos, and 5% perfume videos.

Monthly Viewership of YouTube Beauty Content Continues to Accelerate

As of April 2015, there are over **180,000 beauty creators and hundreds of beauty brands on YouTube** who collectively upload 100 hours of beauty-related content to YouTube each day.

As depicted in Figure 2, YouTube's beauty content ecosystem consists of:

- **51% makeup videos**
- **28% hair videos**
- **10% nails videos**
- **6% skincare videos**
- **5% perfume videos**

Monthly views of makeup, hair, skincare, nails, and perfume videos on YouTube are increasing rapidly as the amount of beauty content that is available and YouTube audience interest expands. (Figure 3)
From January 2014—April 2015, beauty content on YouTube experienced a **50% growth rate in views.**

Monthly Views of Beauty Content On YouTube Over Time

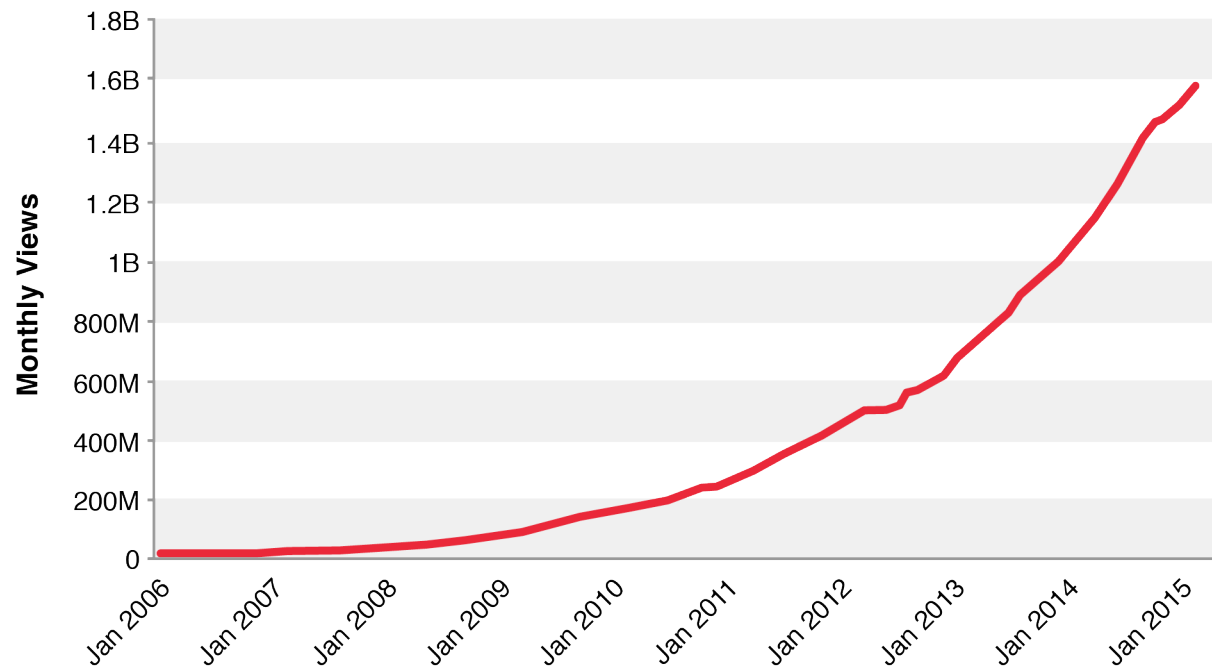


Figure 3.
Monthly views of beauty content on YouTube have increased over time from 200 million views per month in September 2009 to 1.3 billion views in September 2014 to 1.6 billion views per month as of March 2015.

The World of Beauty on YouTube Is Increasingly a Mobile One

During the 2015 Digital Content NewFronts, YouTube CEO Susan Wojcicki revealed that **YouTube reaches more viewers in the 18-to-49 age demographic via mobile than any television network.**²

- As of April 2015, **mobile devices account for 55% of beauty views** on YouTube.
- New interactive YouTube features, such as **Cross-platform Shoppable Links**, allow users to make beauty purchases directly from brand ads on desktop or mobile. (Figure 4)

As viewing beauty content on mobile becomes mainstream, beauty viewers are increasingly bringing YouTube into their bedrooms and bathrooms via mobile devices to **follow along to YouTube makeup tutorials in real-time.** (Figure 5)

In response to this trend, new beauty products have appeared on etsy.com and other e-commerce websites. Figure 5 depicts one of numerous makeup organizers available for purchase on etsy.com that also features slots to hold a tablet or smartphone.

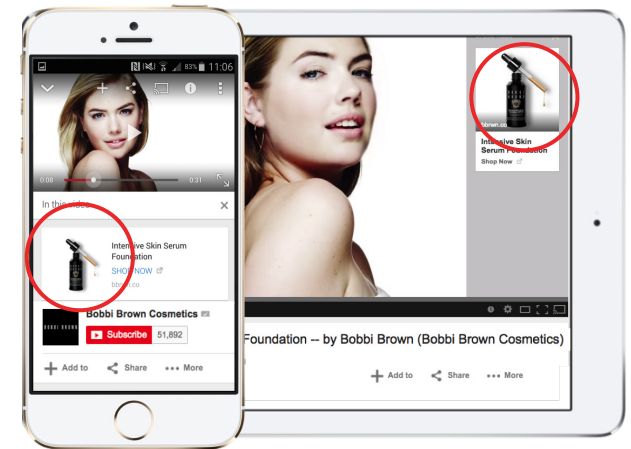


Figure 4. New YouTube functionality allows viewers to quickly and easily purchase products directly from ads.

Daily YouTube Tutorial Consumption vs. Brand Video Search

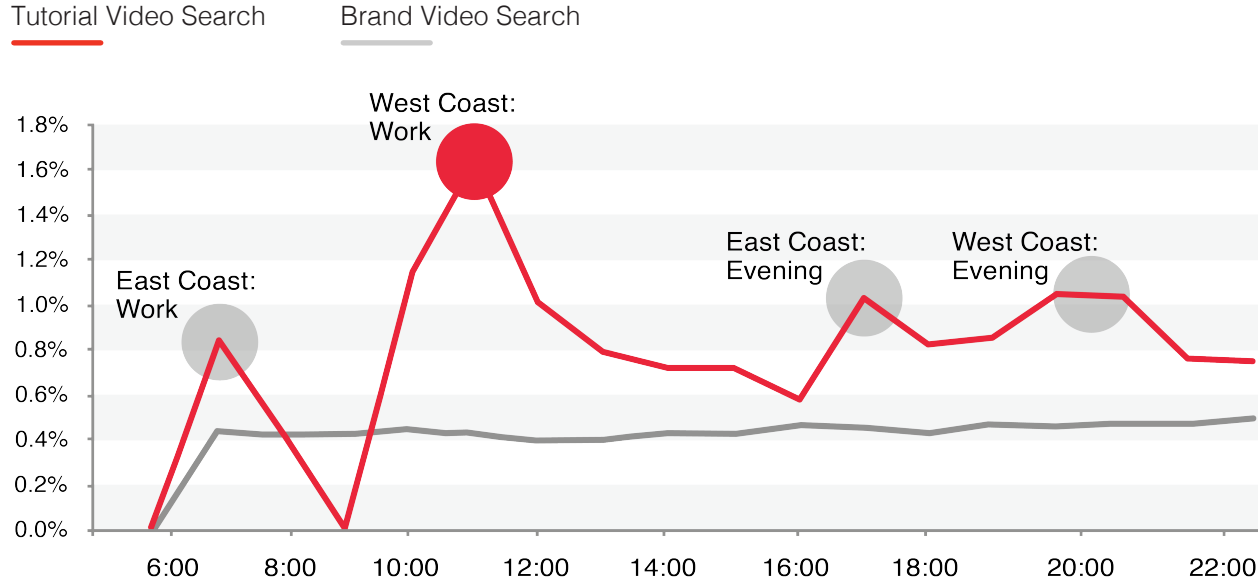


Figure 5. YouTube viewers are searching for beauty tutorials to follow along to in real-time as they get ready for work or an evening out. The popularity of YouTube tutorials is driving new product development, such as the dual makeup organizer / mobile device holder pictured to the right.



2. The Verge. April 29, 2015. <http://www.theverge.com/2015/4/29/8518535/youtube-beating-tv-networks-with-mobile-alone>

The Changing Beauty Creator Landscape

“Beauty creators on YouTube own 95.4% of the content within YouTube’s beauty ecosystem.”

Established beauty creators face increased competition from rising stars

In 2014, Pixability’s original *Beauty on YouTube* study revealed that content creators, not brands, controlled 97% of YouTube’s beauty content and conversations. As of April 2015, **beauty creators on YouTube own 95.4% of the content within YouTube’s beauty ecosystem.**

Beauty is one of YouTube’s most competitive industry verticals because of the sheer number of creators and beauty brands publishing content within the space. Other verticals on the platform include consumer electronics, gaming, fashion, and comedy. Over the past year, **significant changes have occurred within YouTube’s beauty creator A-List:** the top-ranked beauty creators as defined by total channel subscribers, views, and audience engagements.

As **famous YouTube creators increasingly find their time divided between YouTube and additional endorsements**, lesser-known beauty creators are competing to take their place on the platform.

MichellePhan: The Evolution of A YouTube Beauty Star

YouTube beauty creator **MichellePhan** (Michelle Phan) initially rose to prominence within YouTube’s beauty community by consistently publishing high-quality beauty content to her channel. Over time, the YouTube creator has attracted and retained a large, loyal following of subscribers.

Michelle Phan founded her first company in 2012: **ipsy**, a subscription cosmetics company. In August 2013, with 4.5 million total YouTube channel subscribers and 750 million video views, Michelle Phan launched **em michelle phan** — a branded makeup line supported by L’Oréal Paris. Input submitted online from Michelle’s followers and subscribers played a key role in the line’s product design and color palettes.

ipsy is expected to yield 120 million dollars in revenues in 2015. But **2015 also marks the first time that MichellePhan’s channel subscriber count has been overtaken by another YouTube beauty creator.**

As of April 2015, **macbarbie07 (Bethany Mota)** is YouTube's most subscribed beauty creator, with **8.7 million total YouTube channel subscribers**.

The **MichellePhan** channel still remains YouTube's top beauty channel when ranked by total lifetime views. However, **MichellePhan monthly YouTube views have declined from 25.5 million views per month in 2009 to a 3-year low of 15 million views per month in 2015.** (Figure 6)



By the Numbers
MichellePhan

YouTube's most-viewed beauty creator.

Total Views: 1,167,958,012

Subscribers: 7,686,254

Total Videos: 360

MichellePhan: The Rise—and Potential Fall—of YouTube's Original Beauty Queen

January 2010
Publishes "Lady Gaga Bad Romance Look" video



September 2012
Co-founds *ipsy.com*, a subscription beauty site and community



August 2013
Launches *em michelle phan*, makeup line backed by L'Oréal Paris

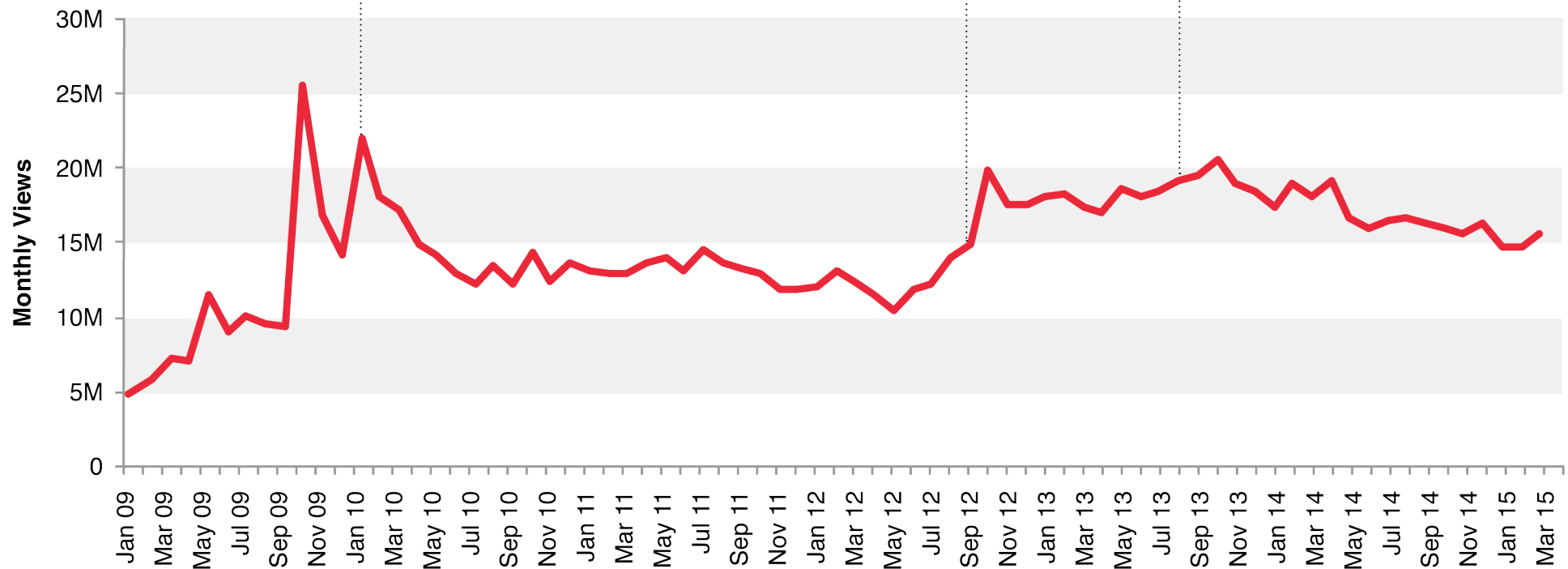


Figure 6. Monthly views of MichellePhan's YouTube beauty channel have fluctuated over time. The year 2009 marked the first time MichellePhan's channel received over 25 million views in a single month. In March 2015, MichellePhan's monthly channel views sunk below 16 million views for the first time since 2012.



By the Numbers RCLbeauty101

An up-and-coming YouTube beauty creator.

Total Views: 189,282,228

Subscribers: 2,147,023

Total Videos: 199

YouTube Publishing Schedules

Rachel Levin versus Michelle Phan

	RCLbeauty101	MichellePhan
YouTube Videos Published In 2015	24*	13*
YouTube Videos Published In 2014	80	63
Channel Subscriber Growth Rate from January 2014—April 2015	82%	39%

*Videos published as of April 15, 2015

New Content Is Key for YouTube Creator Channel Growth

The sidebar to the left compares the YouTube publishing schedule of beauty creator RCLbeauty101 (Rachel Levin) to that of MichellePhan.

- Over the past few years, **the rate at which new videos are being published to MichellePhan's YouTube channel has sharply declined.**
- Sustained YouTube channel growth is challenging for any beauty brand or creator without a **regular cadence of new video content to attract views and channel subscribers.**

The Growing Popularity of Rachel Levin

RCLbeauty101 is an up-and-coming YouTube beauty creator who leverages a variety of social media including Vine, Twitter, and Instagram to engage with viewers and recruit new subscribers to her channel.

In contrast to MichellePhan's declining monthly viewership, RCLbeauty101 **hit a new monthly-views record for her channel with 18 million new views added in April 2015.** (Figure 7)

Monthly Views of YouTube Beauty Creator RCLbeauty101's Channel Over Time

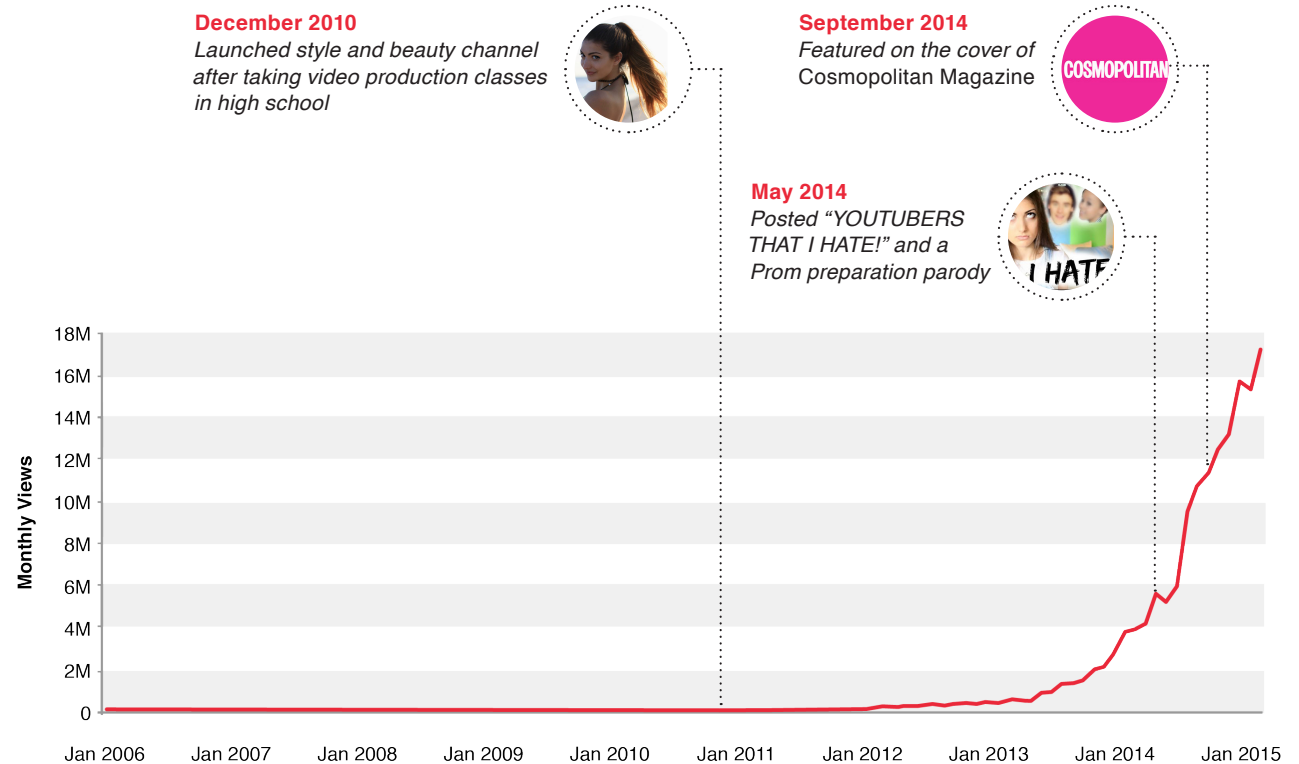


Figure 7.
As of April 2015, lesser-known YouTube beauty creator RCLbeauty101 attracts more views per month than established YouTube beauty creator MichellePhan.

Second-Generation Beauty Creators Are Expanding Channel Subscribership at a Faster Growth Rate Than Original Beauty Stars

Total YouTube **channel subscribership numbers are becoming increasingly relevant to beauty brand advertisers. YouTube channel subscribers** are YouTube viewers who have opted in to receive an email notification every time a new video is uploaded to a specific channel, indicating a high level of loyalty and engagement. The term *subscriberships* is used when referring to the entire beauty space, because a single subscriber can opt in to multiple channels.

As of 2015, channel subscribership annual growth rates for nearly all of YouTube's original beauty creators have fallen below those of up-and-coming beauty creators. "Second generation" beauty creators such as [MyLifeAsEva](#) and [maybabytumbler](#) **established their YouTube channels after Michelle Phan, but have the highest annual channel subscribership growth rates out of any beauty creator channel on YouTube as of April 2015.** (Figure 8)

- [MyLifeAsEva's](#) subscriber base grew **1,982%** from January 2014—April 2015. (Figure 9)
- [maybabytumbler's](#) subscriber base grew **960%** from January 2014—April 2015.
- [MichellePhan's](#) subscriber base grew **39%** from January 2014—April 2015.

Top 10 Fastest Growing YouTube Beauty Creator Channels

by January 2014—April 2015 Subscriber Growth Among Channels With **Over 500,000** Subscribers

Rank	Channel	Total Subscribers as of April 2015	% Growth as of April 2015
1	MyLifeAsEva	2,463,696	1,982%
2	maybabytumbler	2,578,788	960%
3	laurenbeauty	2,874,900	146%
4	zoella280390	8,122,992	144%
5	CutiePieMarzia	5,317,409	116%
6	macbarbie07	8,655,409	93%
7	CuteGirlsHairstyles	3,316,030	88%
8	stilababe09	3,349,072	80%
9	glozell1	3,534,041	47%
10	MichellePhan	7,686,254	39%

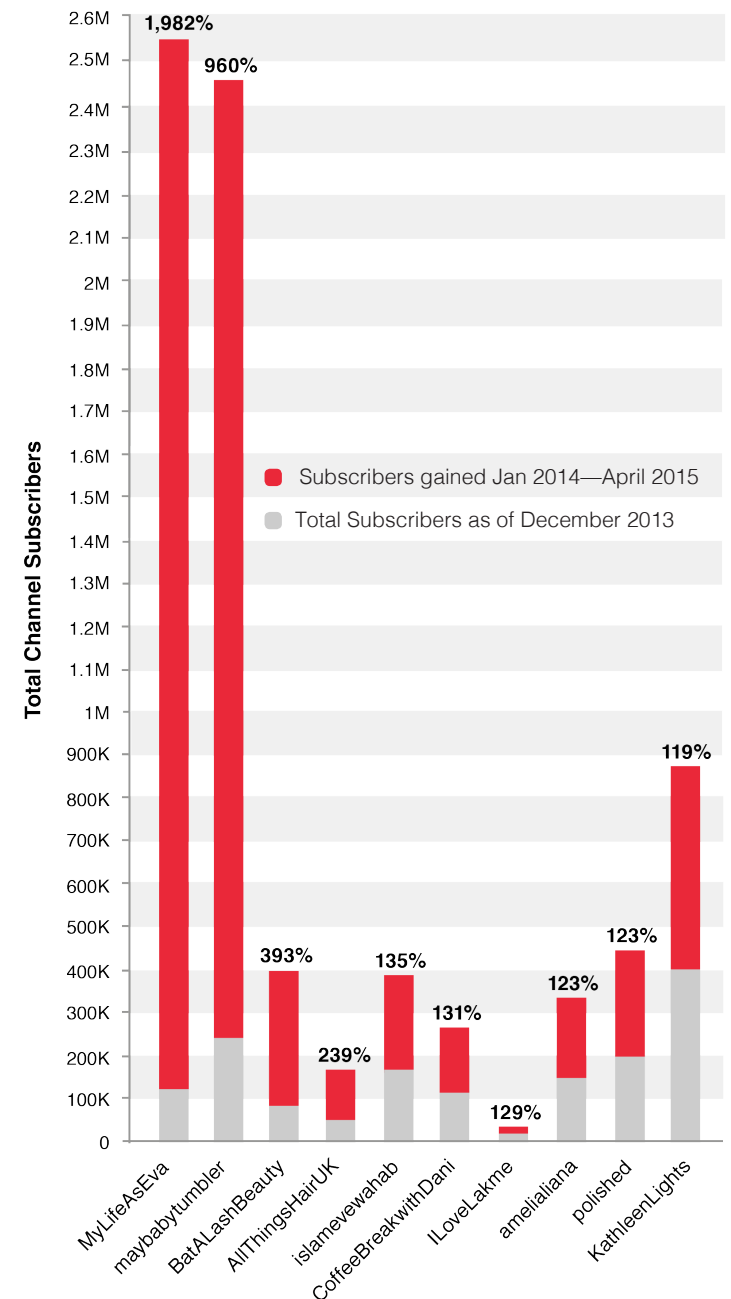
Figure 8.
MyLifeAsEva, maybabytumbler, laurenbeauty, and zoella280390 own YouTube's fastest-growing beauty creator channels by percent growth among channels with more than 500,000 subscribers.

Figure 9.
Up-and-coming YouTube beauty creators such as [BatALashBeauty](#) and [AllThingsHairUK](#) have higher subscriber growth rates from January 2014 to April 2015 than [MichellePhan](#) or [zoella280390](#).

Top 10 Fastest Growing YouTube Beauty Creator Channels

by Subscriber Growth Among Channels With **Under 500,000**

Total Subscribers as of December 2013



Top 25 YouTube Beauty Creator Channels

by Total Views

Rank	Channel	Total Views
1	MichellePhan	1,167,958,012
2	macbarbie07	682,838,749
3	zoella280390	433,041,204
4	CuteGirlsHairstyles	491,488,303
5	dope2111	429,285,034
6	bubzbeauty	376,402,800
7	kandeejohnson	310,304,814
8	LuxyHair	264,855,644
9	juicystar07	264,539,522
10	dulcecandy87	250,437,172
11	stilababe09	240,723,826
12	missglamorazzi	235,164,502
13	pixi2woo	227,915,978
14	pixiwoo	226,617,903
15	gossmakeupartist	223,814,409
16	bebexo	204,058,158
17	JLovesMac1	199,962,641
18	itsjudytme	195,230,035
19	laurenbeauty	179,516,400
20	lilithedarkmoon	169,916,878
21	AllThatGlitters21	168,855,758
22	GregoryGORGEOUS	166,256,294
23	MakeupGeekTV	161,101,106
24	makeupbytiffanyd	154,153,566
25	cliomakeup	151,176,758

Figure 10. YouTube's top 25 beauty creator channels, ranked by total views.

Figure 11. February 2015 marked the first time YouTube beauty creators zoella280390 and macbarbie07 earned more views per month than MichellePhan.

Top YouTube Beauty Creators by Total Views

MichellePhan leads YouTube's beauty creator ecosystem with a lifetime total of **1.1 billion views**. (Figure 10) However, many of YouTube's fastest-growing beauty channels (measured by monthly views) belong to up-and-coming creators. (Figure 11) In February 2015, creators zoella280390 and macbarbie07 both surpassed MichellePhan in monthly channel views, signifying a changing of the guard within the beauty creator community.

YouTube's Changing Beauty Creator A-List



zoella280390 (Zoe Sugg)

8,122,992 Subscribers



macbarbie07 (Bethany Mota)

8,655,409 Subscribers



MichellePhan (Michelle Phan)

7,686,254 Subscribers



pixi2woo (Tanya Burr)

2,964,531 Subscribers

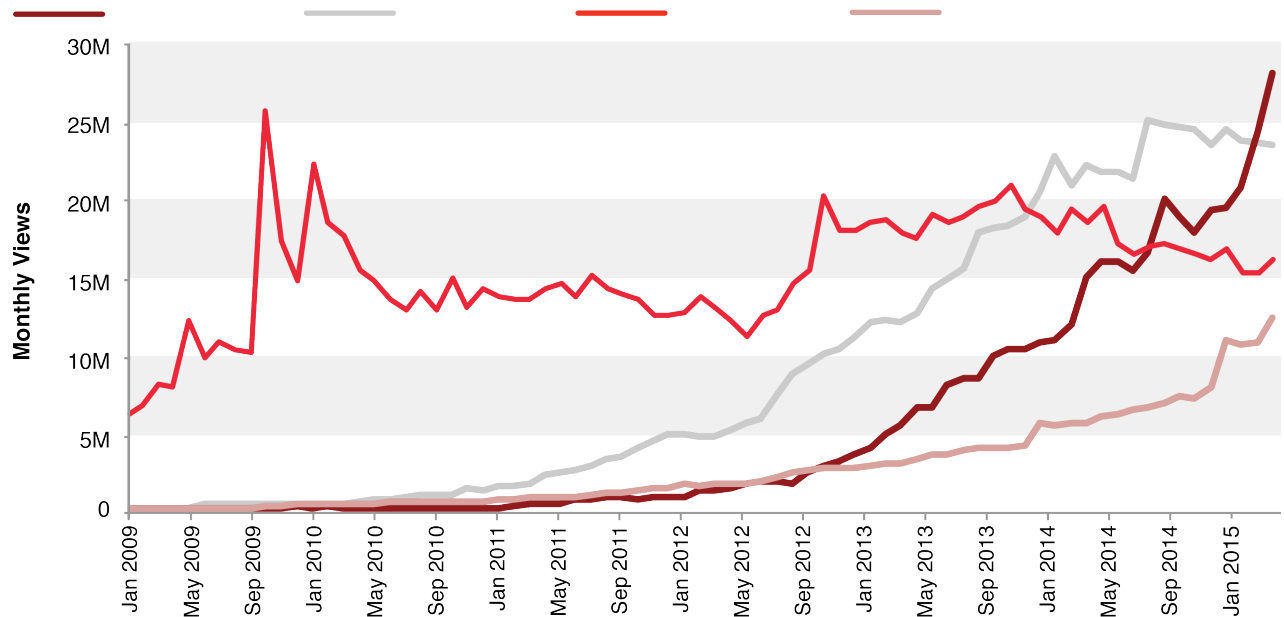
Top YouTube Beauty Creators by Monthly Views

zoella280390

macbarbie07

MichellePhan

pixi2woo



Top YouTube Beauty Creators by Total Audience Engagements

YouTube audience engagement is an increasingly important metric for brand advertisers. **Audience engagements** are defined as the total number of viewer comments, Likes, Dislikes, Tweets, and Facebook shares for a specific YouTube channel or video.

- **YouTube channel watch time, subscriber numbers, and audience engagements** are more reliable measures of YouTube channel and video performance than views alone, which can be bought or obtained via non-human robot traffic.
- **macbarbie07 (Bethany Mota) has more total audience engagements than any other YouTube beauty creator**, with 32,271,500 total engagements as of April 2015, and **38%** more audience engagements than **MichellePhan**. (Figures 12 and 13)

Top YouTube Beauty Creators

by Total Audience Engagements (Total Comments, Likes, Dislikes, Tweets, and Facebook Shares)

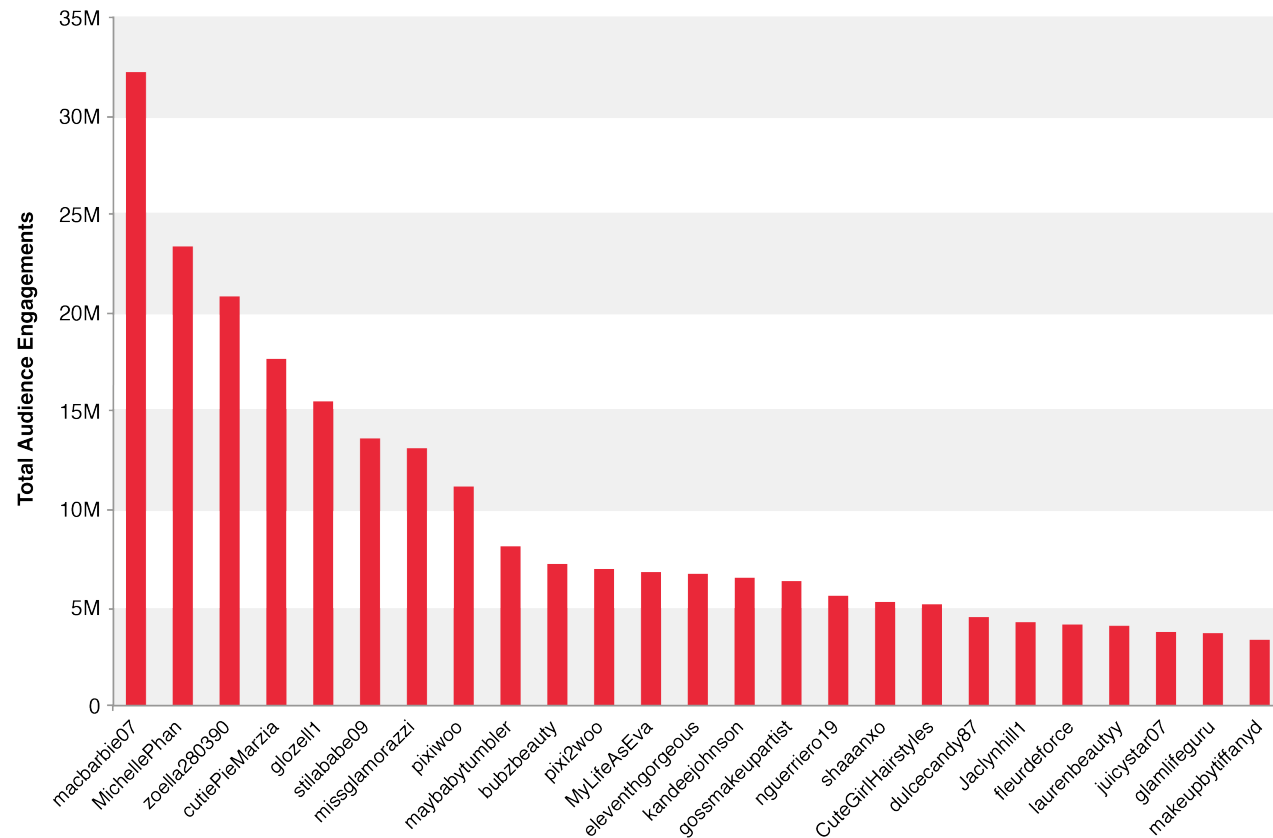


Figure 13. Beauty creator macbarbie07 has the most total audience engagements of any YouTube beauty creator and 38% more engagements than MichellePhan.

Top 25 YouTube Beauty Creator Channels

by Audience Engagements (Total Comments, Likes Dislikes, Tweets, and Facebook Shares)

Rank	Channel	Total Audience Engagements
1	macbarbie07	32,271,500
2	MichellePhan	23,448,326
3	zoella280390	20,843,031
4	CutiePieMarzia	17,730,278
5	glozell1	15,500,816
6	stilababe09	13,644,227
7	missglamorazzi	13,118,430
8	pixiwoo	11,165,885
9	maybabytumbler	8,154,990
10	bubzbeauty	7,293,653
11	pixi2woo	6,975,413
12	MyLifeAsEva	6,771,789
13	elevnthgorgeous	6,727,031
14	kandeejohnson	6,547,657
15	gossmakeupartist	6,357,143
16	nguerriero19	5,626,841
17	shaaanxo	5,289,643
18	CuteGirlsHairstyles	5,173,048
19	dulcecandy87	4,498,245
20	Jaclynhill1	4,250,173
21	fleurdeforce	4,123,164
22	laurenbeauty	4,086,783
23	juicystar07	3,779,900
24	glamlifeguru	3,729,932
25	makeupbytiffanyd	3,354,958

Figure 12. YouTube's top 25 beauty creator channels, ranked by total audience engagements.

Beauty Brand Performance on YouTube

Beauty brands are increasing YouTube advertising spend to catch up to creators

Content creators continue to attract the vast majority of user-initiated YouTube beauty searches (Figure 15 on following page), yet **beauty brand channels increased their YouTube viewership 35% faster than the overall industry from January 2014—April 2015.**

As of 2015, beauty brands collectively own 4.6% of YouTube's beauty ecosystem. (Figure 14)

Based on ad spend data gathered by Pixability's software, the dramatic year-over-year growth in views demonstrated by many of the beauty brand channels included in this study is primarily a result of **paid advertising campaigns.**

Views of YouTube Videos Mentioning Beauty Brands Are Increasing

The overall conversation around beauty brands on YouTube—including views of videos that contain specific **brand mentions**—has **increased 53% in the past year.**

As Figure 16 on the following page depicts, views of videos including brand mentions of Maybelline, L'Oréal Paris, CoverGirl, or Dove have grown significantly over the past year. Since January 1, 2014:

- Views of YouTube videos which mention **Maybelline increased 140% to 3.3 billion views.**
- Views of YouTube videos which mention **L'Oréal Paris increased 160% to 3 billion views.**
- Views of YouTube videos which mention **CoverGirl increased 170% to 805 million views.**
- Views of YouTube videos which mention **Dove increased 220% to 420 million views.**

2015 YouTube Beauty Ecosystem | Share of Voice

Beauty Industry

All YouTube videos mentioning beauty topics.
45.3B Views

Brand Conversation

All videos mentioning a beauty brand.
20.3B Views | 44.8% of Total Space

All Major Brand Channels

Cumulative views on channels owned by brands.
2.1B Views | 4.6% of Total Space

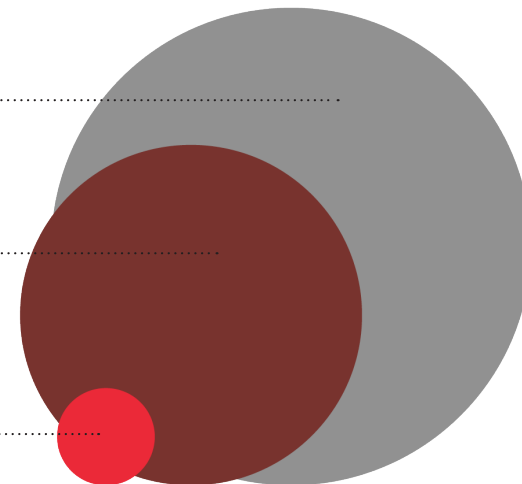


Figure 14.
Beauty brands collectively own 4.6% (2.1 billion views) of YouTube's total 45.3 billion beauty views.

YouTube Viewer Search Queries Over Time for Top Beauty Brands Compared to Top YouTube Beauty Creators

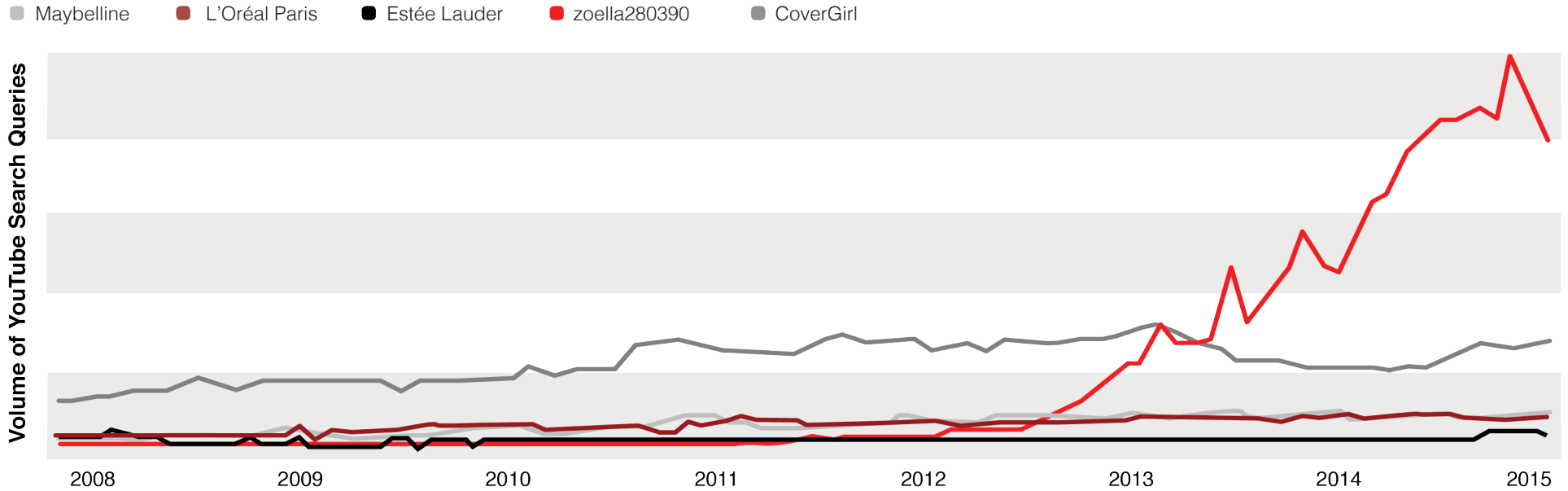


Figure 15. YouTube search query volume for specific beauty creators has increased significantly over time while search query volume for beauty brands on YouTube has remained relatively flat.

Growth in the Total Number of Views of Videos Mentioning Beauty Brands Over Time

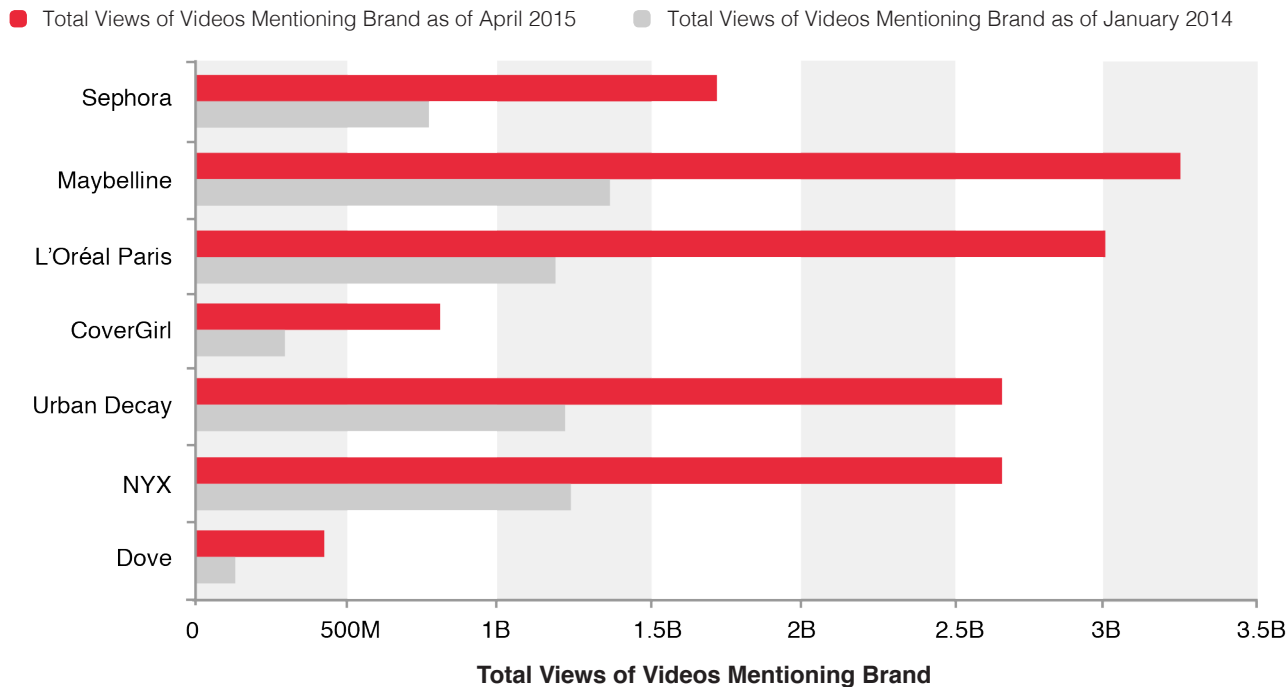
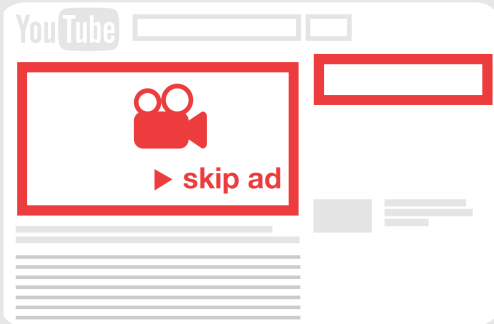


Figure 16. The total number of views of videos mentioning beauty brands as of April 2015, compared with the total number of views of videos mentioning beauty brands as of 2014.

YouTube TrueView Advertising



TrueView In-Stream ads are highly targeted, skippable video ads, which are inserted before relevant YouTube videos.

Although TrueView ads begin to play automatically and can be skipped after 5 seconds, advertisers pay only if the viewer completes a 30-second ad or watches more than 30 seconds of a longer commercial.

YouTube TrueView In-Stream and TrueView In-Display ads typically deliver high view numbers, clickthrough rates, and audience engagements because of their opt-in nature.

3. eMarketer. April 16, 2015. <http://www.emarketer.com/Article/US-Adults-Spend-55-Hours-with-Video-Content-Each-Day/1012362?ecid=PR1021>

4. IAB. April 22, 2015. http://www.iab.net/about_the_iab/recent_press_releases/press_release_archive/press_release/pr-042215

Figure 17.
Monthly views of brand-produced YouTube beauty content increased 78% from January 2014—April 2015.

The Effectiveness of Paid Media on YouTube

YouTube is available in 76 languages to 95% of the world's Internet-connected population. New findings from an *eMarketer* report released in April 2015 show that adults in the United States will spend an average of 5 hours and 31 minutes a day in 2015 watching video content.³

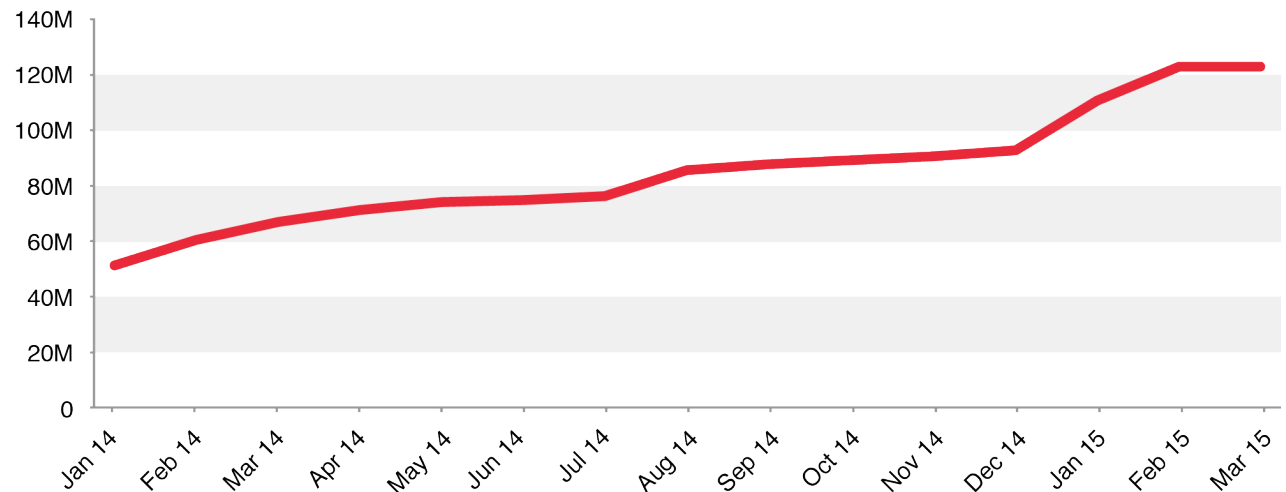
As the popularity of online video grows across key global demographics, new data is becoming available highlighting the growing shift from television to digital video within the US adult population.

- **In 2011**, US adults spent an average of **21 minutes per day watching digital video**.
- **In 2015**, US adults will spend an average of **1 hour and 16 minutes per day watching digital video**.
- In 2011, US adults spent an average of 4 hours and 35 minutes per day watching television.
- In 2015, US adults will spend an average of 4 hours and 15 minutes per day watching television.

As of April 2015, the IAB reported that **online video advertising revenue increased 17% between 2013—2014, from 2.8 billion dollars to a total of 3.3 billion dollars**.⁴

- **Total views per month of beauty-brand-produced YouTube content increased 78%** between January 2014 and April 2015. (Figure 17)
- **Ten of the top 25 most-viewed YouTube beauty videos published in the first four months of 2015** are produced or sponsored by beauty brands. (Figure 18 on following page)

Monthly Views Over Time of Beauty Brand YouTube Content



Top 25 YouTube Beauty Videos of 2015 (January 1, 2015—April 31, 2015)

by Views

Rank	Brand or Creator	Video	Views
1	Pantene	How to Fix Damaged Hair: Pantene Conditioner Repair & Protect	10,042,354
2	AndreasChoice (Colgate-sponsored creator video)	Episode 1: How to Accentuate Your Smile - The Smile Show™	9,019,783
3	Dove	Dove Choose Beautiful Women all over the world make a choice	7,893,239
4	CoverGirl featuring celebrities P!nk, Sofia Vergara & Janelle Mon�e	Sofia Vergara, Janelle Mon�e & P!nk—Find the Best Foundation Make Up COVERGIRL Commercial	6,814,208
5	Almay (featuring celebrity Carrie Underwood)	Almay + Carrie Underwood Simply American	5,754,946
6	Colgate	Secrets to a Whiter Smile Debuts March 11th, 2015 - The Smile Show	5,278,732
7	zoella280390	Best Friend VS Boyfriend Zoella	5,274,401
8	macbarbie07	Spring Guide! Beach Essentials, Sweatproof makeup + more!	3,709,839
9	MoreZoella	Chopping Off My Hair	3,495,534
10	macbarbie07	Last Minute Valentine's Day Ideas! DIY Gifts, Treats, & my faves!	3,473,070
11	bareMinerals (featuring Australian model Shanina Shaik)	bareMinerals: Complexion Rescue Tinted Hydrating Gel Cream Shanina Shaik	3,470,812
12	zoella280390	In-Flight Travel Essentials Zoella	3,097,482
13	zoella280390	Having Babies & Annoying Alfie #AskZoella	3,087,232
14	maybabytumbler	Morning Routine For School 2015 MayBaby	3,044,553
15	MyLifeAsEva	My School Routine MyLifeAsEva	2,999,580
16	zoella280390	Drugstore Valentines Makeup Tutorial Zoella	2,850,207
17	zoella280390	America Haul Sephora, Bath & Body Works & Sweets Zoella	2,765,058
18	Revlon (featuring celebrity Emma Stone)	NEW Revlon Ultra HD Lipstick	2,746,800
19	zoella280390	What's In My Handbag 2015 Edition Zoella	2,746,039
20	grav3yardgirl	PINTEREST - RED LIPSTICK CONCEALER?	2,590,008
21	Walmart	How-To: The Top Knot	2,465,591
22	Herbal Essences	Herbal Essences Take Your Hair to Paradise—Wild Naturals :30	2,256,358
23	zoella280390	2014 Beauty Favourites Zoella	2,209,806
24	grav3yardgirl	PINTEREST- MAGICAL NAIL POLISH!	2,118,023
25	zoella280390	Playground Films & The Perfect Pizza #AskZoella	1,956,008

Figure 18.

2015's most-viewed YouTube beauty video is a 16-second Pantene commercial that was most likely run as non-skippable preroll. Ten of 2015's most-viewed videos are brand-sponsored or brand-produced. Other top 2015 brand videos feature celebrity endorsers, such as country star Carrie Underwood for Almay and actress Emma Stone for Revlon.

YouTube Channel Maintenance Tips for Beauty Brands

Although retaining historical content on official YouTube brand channels significantly increases overall video and view counts over time, this approach isn't always possible for every brand.

Partnering with YouTube content creators who can host sponsored videos on their own channels is one method of maintaining an always-current YouTube brand channel while still expanding YouTube brand mentions.



Beauty creator AndreasChoice reviews Colgate's Optic White Toothpaste in a sponsored video hosted on her YouTube channel.

Evergreen Content Is A Key Component of YouTube Channel Growth Over Time

Twenty-five of the 215 beauty brands included in Pixability's 2015 *Beauty on YouTube* study have **fewer total videos on their YouTube channels in 2015 than they did as of January 2014**.

- Though all but two beauty brands have continued to create and publish new content to YouTube, some beauty brands have removed or hidden historical YouTube videos.
- Removing **evergreen content** from YouTube (historical advertising campaigns or product demos, for example) or making videos private **results in lost views and reduced total channel video counts**.

Dior is an example of a brand that consistently removes historical commercials and content from its official brand channel. Dior removed a significant amount of content during May, June, and July 2014, which resulted in a loss of over 40 million associated views. This non-evergreen approach to YouTube has resulted in periodic drops in Dior's total channel view count over time. (*Figure 19*)

Dior YouTube Channel View Count Over Time

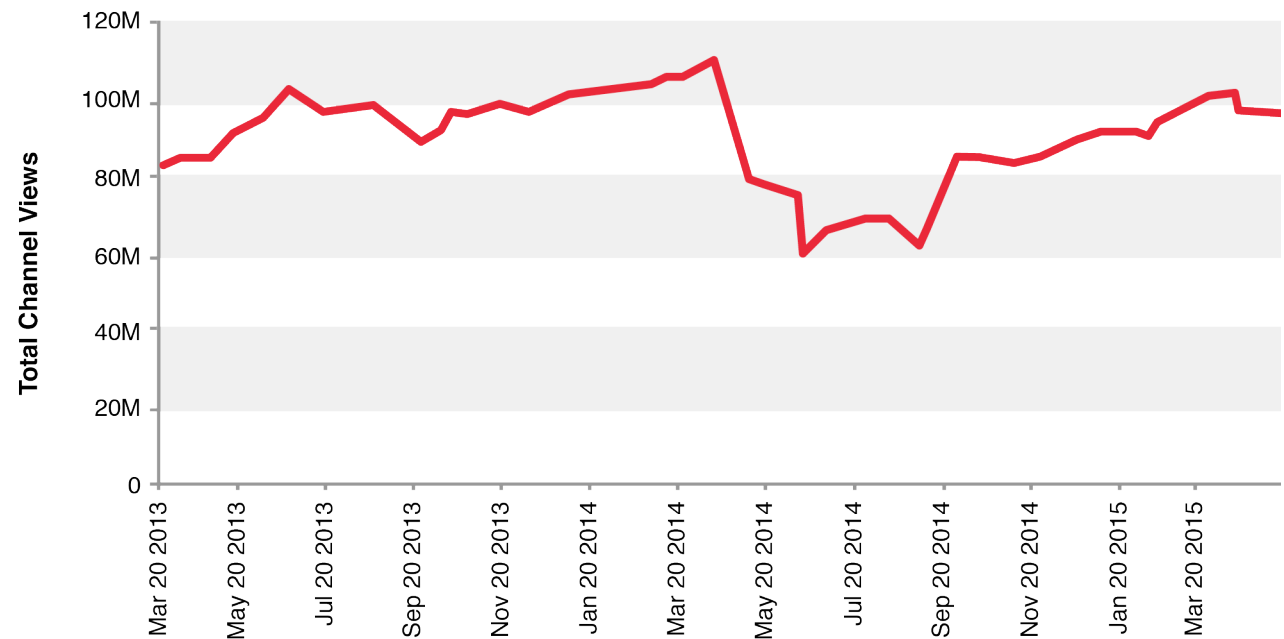


Figure 19. Removal of historical commercials and content has resulted in periodic declines in Dior's official YouTube channel view count.

YouTube's top-performing beauty brands publish new content to their YouTube channels while retaining older videos as **evergreen content**.

Sephora has a total of over 314,000 channel subscribers and ranks third among beauty brands on YouTube according to total channel subscribership count. The number of videos available on Sephora's YouTube channel increased from **770 to 1,552 total videos between January 2014—April 2015**. (Figure 20)

Top Beauty Brand YouTube Channel Video Counts Over Time

by Total Number of Public Videos Accessible on Brand Channel as of April 2015

Rank	Brand	URL	# of Videos as of 2015	# of Videos as of 2014
1	Sephora	Sephora	1,552	770
2	Clarins	clarins	1,280	923
3	Dolce & Gabbana*	dolcegabbanachannel	735	620
4	Victoria's Secret*	VICTORIASSECRET	563	403
5	Birchbox	birchboxtv	491	316
6	Burberry*	burberry	474	362
7	Lush Cosmetics	Lushcosmetics	453	699
8	CHANEL*	CHANEL	437	323
9	Mary Kay	marykay	399	313
10	e.l.f. Cosmetics	eyeslipsfacedotcom	389	347
11	DermStore	DermStore	387	233
12	L'Oréal Paris	lorealparisnyc	377	266
13	Maybelline New York	maybellinenewyork	275	179
14	Diesel*	DieselPlanet	267	245
15	Napoleon Perdis	napoleonperdis	262	31
16	Ralph Lauren*	RLTVralphlauren	257	195
17	CoverGirl	COVERGIRL	249	159
18	Pantene	pantene	248	174
19	L'Oréal Professionnel	lorealprofessionnel	242	147
20	Matrix	imagineallyoucanbe	238	113
21	Paul Mitchell	PaulMitchellChannel	213	51
22	Oriflame	oriflamecosmetics	209	155
23	illamasqua	illamasqua	201	47
24	Bumble and bumble.	TheHouseofBumble	199	118
25	Rimmel London	RimmelLondonUS	139	339

Figure 20. Sephora's YouTube channel has over 314,000 subscribers—the third-largest beauty brand subscriber base. Sephora ranks number one for the highest total number of videos present on a beauty brand's YouTube channel as of April 2015.

Top 25 Rapid Growth Beauty Brand Channels

by % Subscriber Growth (January 2014—April 2015)

Rank	Brand	% Subscriber Growth
1	Rodial	4,371%
2	Clean and Clear	1,817%
3	essie	1,544%
4	Kérastase	1,487%
5	fresh	1,103%
6	Baxter of California	1,094%
7	Olay	997%
8	aveeno	956%
9	Jack Black	713%
10	La Mer	706%
11	Neutrogena	579%
12	Sebastian Professional	533%
13	Schwarzkopf	515%
14	CoverGirl	483%
15	Vidal Sassoon	460%
16	Dermablend Pro	446%
17	RoC Skincare	443%
18	Too Faced Cosmetics	441%
19	Pantene	396%
20	StriVectin	387%
21	Rogaine	384%
22	Clairol	379%
23	Molton Brown	346%
24	LORAC Cosmetics	340%
25	Matrix	337%

Figure 21.
YouTube's top 25 beauty brand channels, ranked by % subscriber growth (not total new subscribers added).

Figure 22.
I Love Makeup, Victoria's Secret, and CHANEL added the greatest number of new subscribers between January 2014 and April 2015. Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

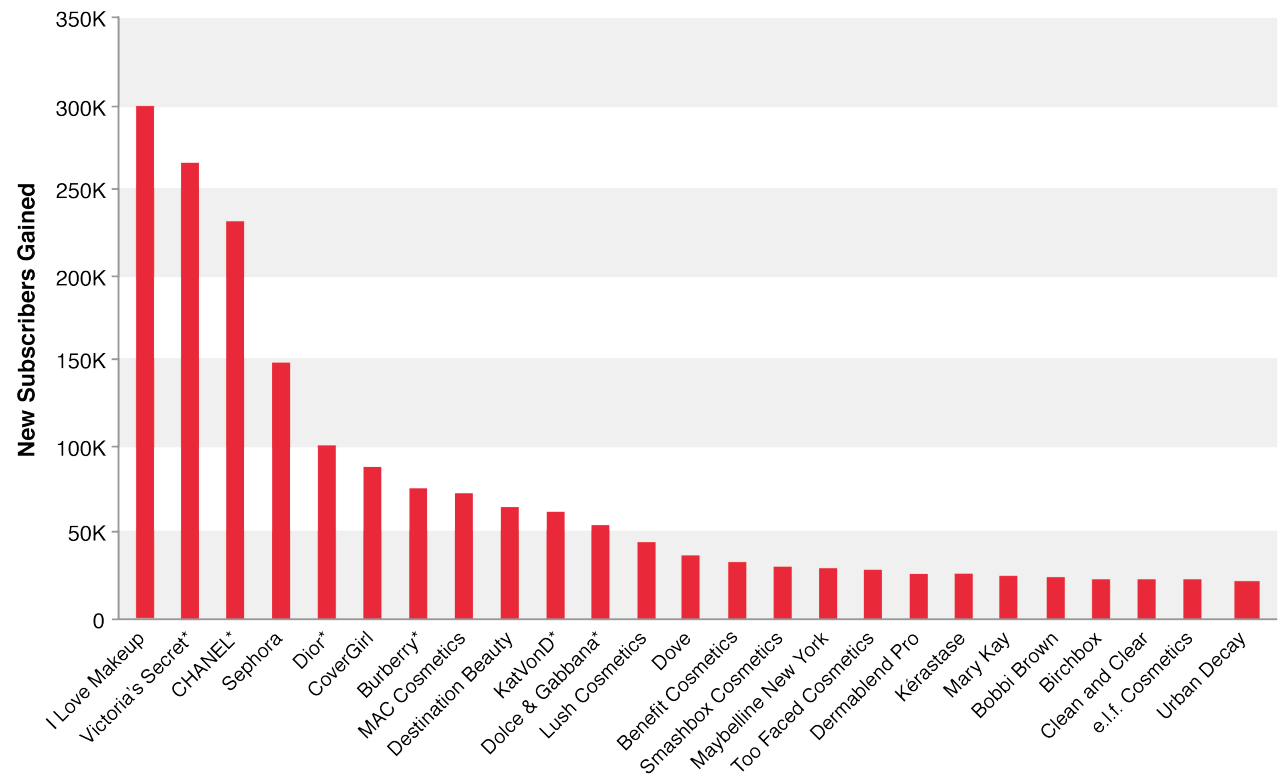
Beauty Brand Channel Subscriber Growth on YouTube

Hair, skincare, and makeup beauty brands are among YouTube's fastest-growing channels as ranked by channel subscriber growth from January 2014—April 2015.

- Skincare brand **Rodial** ranked first with 4,317% channel subscribership growth. (Figure 21)
- **Clean and Clear** ranked second with 1,817% channel subscribership growth.
- **I Love Makeup, Victoria's Secret, and CHANEL** were YouTube's top beauty brand channel performers when ranked by total number of new subscribers added between January 2014—April 2015. (Figure 22)

Top 25 Beauty Brand Channels on YouTube, by Number of Subscribers Gained

from January 2014—April 2015

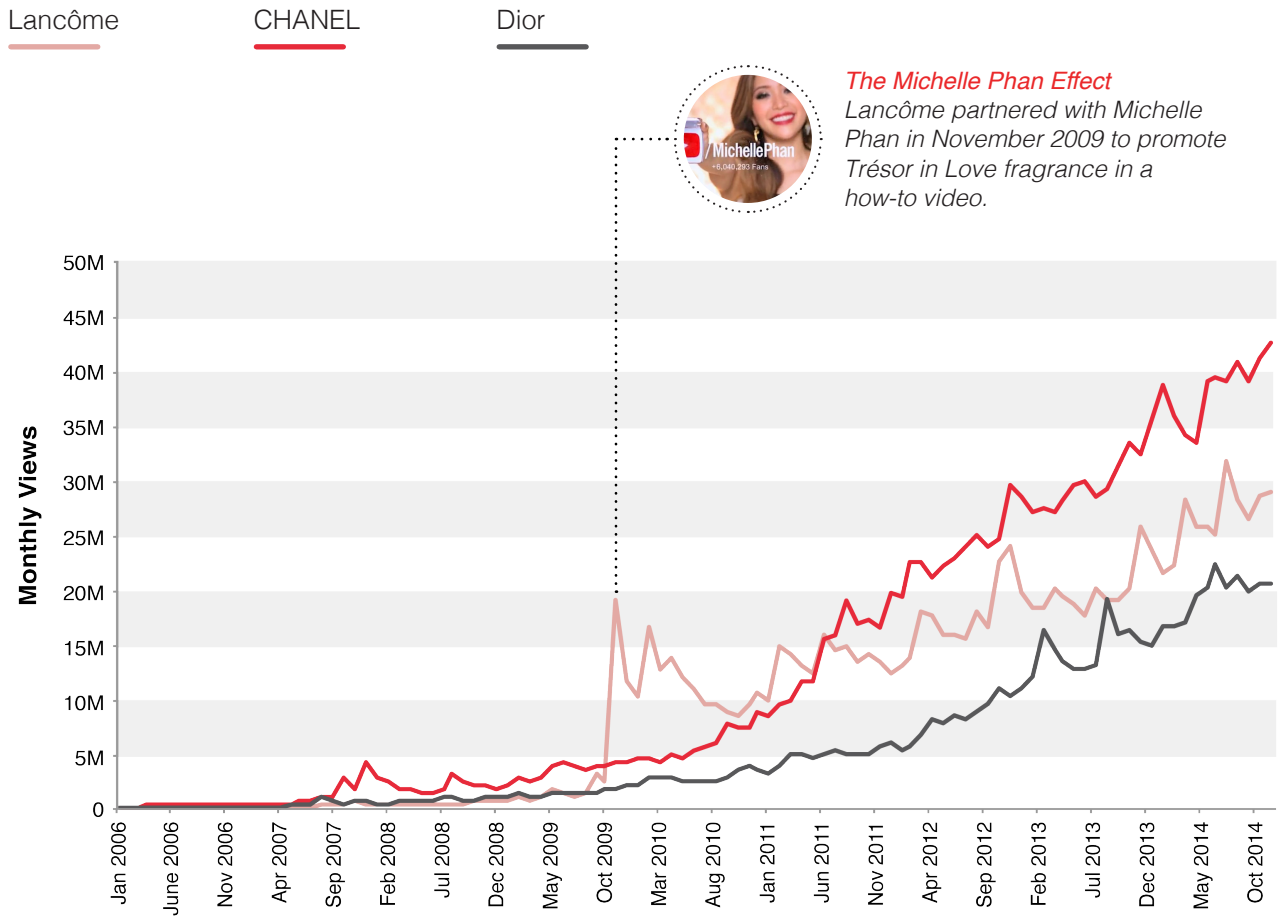


Partnering With YouTube Creators Still Makes Sense for Beauty Brands

Collaborating with YouTube beauty creators has proven highly effective for many beauty brands.

Figure 23 depicts the late 2009 rise in **monthly views of videos mentioning Lancôme that occurred after the brand partnered with YouTube beauty creator Michelle Phan**. Lancôme also experienced a significant lift in channel subscribers and audience engagements (comments, Likes, Dislikes, Tweets, and Facebook shares) following the beauty-brand-creator collaboration.

The Michelle Phan Effect: Monthly Views of YouTube Videos Mentioning Beauty Brands



Case Study: Yes to Carrots and YouTube Beauty Creators

Beauty brand **Yes To Carrots** has repeatedly partnered with YouTube beauty creators to expand its audience.

In 2014, Yes To Carrots launched the marketing campaign Yes To Movement to increase global brand awareness of Yes To Carrots. The brand partnered with YouTube beauty creator **ThatsHeart** to produce a new YouTube video advertising free samples. The video attracted a total of 200,000 views.

Yes To Carrots partnered with YouTube beauty creator **missglamorazzi**, whose video appearances resulted in 400% more views than the brand's 20-video Yes To Fireside Chat series which earned an average of 415 total views per video.

Figure 23. Monthly views of videos that mention specific beauty brands on YouTube. The 2009 spike in views of videos that mention Lancôme is attributed to the beauty brand's partnership with YouTube beauty creator Michelle Phan at that time.



Still image from beauty creator *MichellePhan's* YouTube video "Lady Gaga Bad Romance Look."



Still image from haircare brand *Schwarzkopf's* YouTube video "You — A Declaration of Love by Schwarzkopf Nectra Color."

Beauty Creators Own 80% of YouTube's Top-Performing Beauty Videos of All Time

Twenty of YouTube's 25 top-performing beauty videos of all time **belong to content creators.**

MichellePhan's Bad Romance and Poker Face Lady Gaga makeup tutorials are YouTube's first-and second-top-performing beauty videos of all time, according to total views. Five beauty-brand-produced videos are included in the list, owned by Schwarzkopf, Pantene, Lancôme, Dior, and CHANEL. (Figure 24)

Top 25 YouTube Beauty Videos of All Time

by Total Views

Rank	Brand or Creator	Video Title	Total Views
1	MichellePhan	Lady Gaga Bad Romance Look	49,934,506
2	MichellePhan	Lady GaGa Poker Face Tutorial	34,406,456
3	diamondsandheels14	Acne Foundation Routine for Cystic, Scaring, Oil and Blackheads Cassandra Bankson	26,261,924
4	CuteGirlsHairstyles	Waterfall Braid (Self) Cute Girls Hairstyles	25,813,498
5	dope2111	Me as Angelina Jolie !!! A Make-up Transformation !!!!!	23,676,509
6	pursebuzz	Makeup Tutorial: How to Fake Abs	23,074,735
7	kandeejohnson	Glitterati Lip Tattoo & Lip Word Tattoo Kandee Johnson	21,191,029
8	cristalprostlyer	UNZIPPED ZIPPER FACE MAKEUP	20,374,068
9	itsthefa	Anime Eyes with MAC	19,543,996
10	naturallybellexo	9 Different Eyeliner Looks	18,236,188
11	CuteGirlsHairstyles	Ponytail Bow Back-to-School Cute Girls Hairstyles	17,432,971
12	CelestialDreamx3	Fun and Easy Splatter Party Nail Tutorial	16,944,702
13	Schwarzkopf	You - A Declaration of Love by Schwarzkopf Nectra Color	16,720,828
14	bebexo	Hair Bow Tutorial Hairstyle for Short and Long Hair	16,538,204
15	hair4myprincess	Side Swept French Fish Braid Hairstyle	16,058,370
16	expertvillage	Scary Halloween Makeup : How to Use Alcohol Based Makeup for Halloween	16,001,837
17	Pantene	Not Sorry I #ShineStrong Pantene	15,887,655
18	Lancôme	LA VIE EST BELLE :30 [eng]	15,754,490
19	givegoodface	Leopard Eyes: HD Makeup Tutorial	15,163,565
20	Dior	Miss Dior – La vie en rose: [60]	14,977,270
21	itsjudyttime	Lip Tattoo first impression - itsJudyTime	14,756,414
22	SimpleLittlePleasues	Valentine's Day Water Marble Nail Art Tutorial	13,608,671
23	LuxyHair	How To: Five (5) Strand Braid	13,003,823
24	CHANEL	Marilyn and N°5 (30 version) - Inside CHANEL	12,874,952
25	asksash88	10 Easy Quick Everyday Hairstyles for long hair : Side French Braid Edition	12,461,096

Figure 24.
YouTube's top 25 beauty videos of all time, by total views. Brand-produced videos are indicated in bold.



Creator-Inspired YouTube Tips for Beauty Brands

Structure the focus of paid YouTube campaigns around channel subscriber and audience engagement metrics—not simply video views.

- Leverage YouTube’s social media capabilities to interact directly with channel subscribers and respond to viewer feedback, complaints, or requests.

Set and maintain a consistent YouTube video publishing schedule.

- YouTube subscribers receive an email every time a new video is published to a YouTube channel, so maximize audience touchpoints by publishing new content to YouTube as frequently as possible.
- Many beauty creator channels feature more than 200 original videos and maintain a weekly cadence of new content releases.

Become part of the conversation around popular beauty-related tentpole events on YouTube such as Valentine’s Day and Halloween.

- Plan for specific holiday content well in advance, but understand the relatively short shelf life of event or season-specific content.



Best Practices for Beauty Brand + Content Creator Partnerships

Leverage YouTube celebrities first (rather than traditional Hollywood celebrities) to reach younger audiences.

- A 2015 study conducted by *Variety* revealed that the most influential celebrities among American teens ages 13-to-18 are YouTube stars.

Partner with lesser-known YouTube beauty creators to manage sponsorship costs while still reaching a highly engaged beauty audience.

Select beauty creators to work with who embody an appropriate personality for the brand and who come across on camera as credible and authentic.

- Recent research demonstrates that many viewers trust creators more than they trust brands.
- YouTube viewers react negatively to brand-sponsored videos that contain excessive branding or heavy sales messaging.

Assess the value of potential beauty brand / content creator partnerships by objective measurement metrics.

- Before signing talent, research YouTube beauty creators’ channels for audience engagement metrics, subscriber growth rates and frequency of content publishing.



Case Study: Too Faced and YouTube Beauty Creators

The makeup brand Too Faced partnered with YouTube beauty creator **Dulce Candy** to create and publish videos starring the creator of the brand’s official channel. Dulce Candy hosted additional product review videos, haul videos, and sponsored tutorials featuring Too Faced products on her own YouTube channel.

The six Too Faced sponsored videos hosted on Dulce Candy’s YouTube channel received more than **2.2 million cumulative views**.



66

The videos beauty creators are posting to YouTube have become the new TV shows for young audiences, and aggregating those channels makes YouTube MCNs (multi-channel networks) the new TV networks.⁴

99

Average Likes per Beauty Video View Versus Likes per Brand-Sponsored Giveaway View

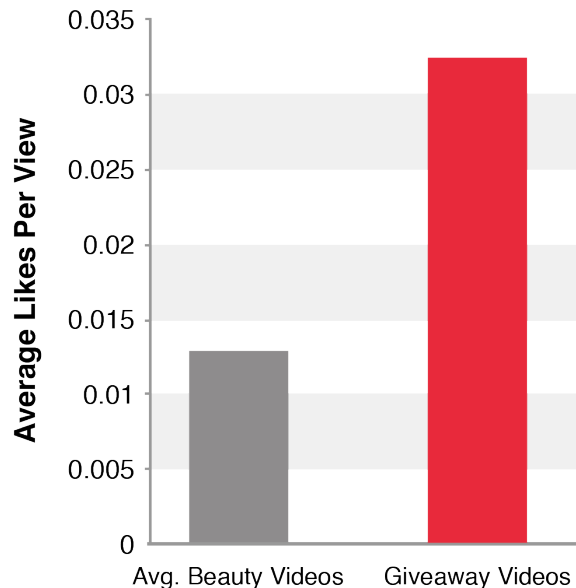


Figure 25.
Beauty-brand-sponsored creator giveaway videos earn more than twice as many Likes per video view compared to a non-giveaway video.

4. AdAge. April 23, 2015. <http://adage.com/article/digital/youtube-nets-hosting-newfronts-events/298192/>

Brand-Sponsored Creator Giveaway Videos Earn More Likes per View Than Any Other Type of YouTube Beauty Content

Brand-sponsored beauty creator giveaway videos prove extremely effective at generating new audience engagements for creator channels. Giveaway videos also provide an opportunity to increase total brand mentions on YouTube without uploading content to an official brand channel. (Figure 25)

Beauty Brand-Sponsored Creator Giveaways 101

- **Beauty-brand-sponsored giveaway videos** are videos in which YouTube content creators raffle off prizes provided by brands among eligible viewers.
- Viewers qualify for the drawing by **subscribing to the beauty creator’s channel, liking the video, or leaving a comment**. Giveaway videos often require the viewer to subscribe to a secondary channel under development by the creator.
- **Beauty creators typically (but not always) disclose the names of sponsoring beauty brands** at the beginning or end of the giveaway.

macbarbie07 “Huge Summer Giveaway!!!” Video
1,908,904 Views



pixiwoo “Make Up For Ever Giveaway” Video
345,432 Views



The YouTube Beauty Creator: A New Kind of Celebrity

In April 2014, YouTube made the decision to introduce two of its most popular beauty creators to the offline world. Traditional television, print, and outdoor advertisements appeared across the United States featuring YouTube beauty creators **MichellePhan** and **macbarbie07** (Bethany Mota).

In a July 2014 *Variety* survey of 1,500 US teens⁵, YouTube stars scored significantly higher than traditional celebrities across a range of characteristics closely correlated to influencing teen purchasing decisions. **The five most influential celebrities among American teens age 13-to-18 are YouTube stars.**

The *Variety* survey participants judged **YouTube stars to be more engaging, extraordinary, and relatable than traditional stars.** Teens feel they can “enjoy a more intimate and authentic experience with YouTube celebrities,” and appreciate YouTube stars’ “candid sense of humor, lack of filtering, and risk-taking spirit.”

In response to Bethany Mota’s growing fame among US female teens, fashion retailers JC Penney, Forever 21, and Aeropostale extended clothing line deals to the YouTube beauty creator. **On January 22, 2015, Bethany Mota interviewed President Obama at the White House** and later attended the annual White House Correspondents’ Association dinner.

YouTube **fashion and beauty creator zoella280390 (Zoe Sugg) has over 7.8 million YouTube channel subscribers.** Zoe Sugg’s book release broke all previous first-week sales records for a debut author in late 2014. Zoe is now in the process of being cast into wax to go on display in Madame Tussaud’s famous museum alongside celebrities such as Justin Bieber and Mick Jagger.



YouTube’s ad campaign promoting creators featured New York subway cars wrapped with images of beauty creator MichellePhan.

5. *Variety*. August 5, 2014. <http://variety.com/2014/digital/news/survey-youtube-stars-more-popular-than-mainstream-celebs-among-u-s-teens-1201275245>

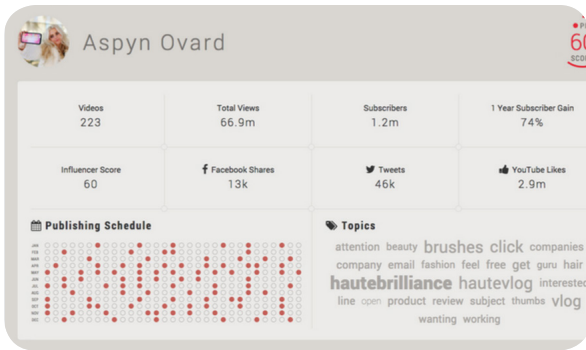


Figure 26. L'Oréal Paris used data-based Content Creator scorecards generated to identify relevant YouTube beauty content creators for Destination Beauty.

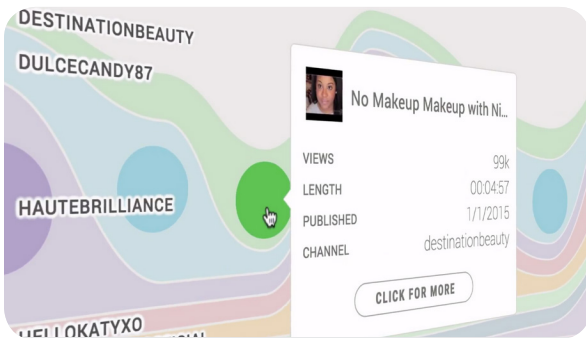


Figure 27. L'Oréal Paris used data-based insights to determine which beauty content topics would be most engaging for its audience of female millennials ages 18–24.

Figure 28. Destination Beauty's channel subscriber numbers more than doubled since August 2014 following its partnership with popular YouTube beauty creators.

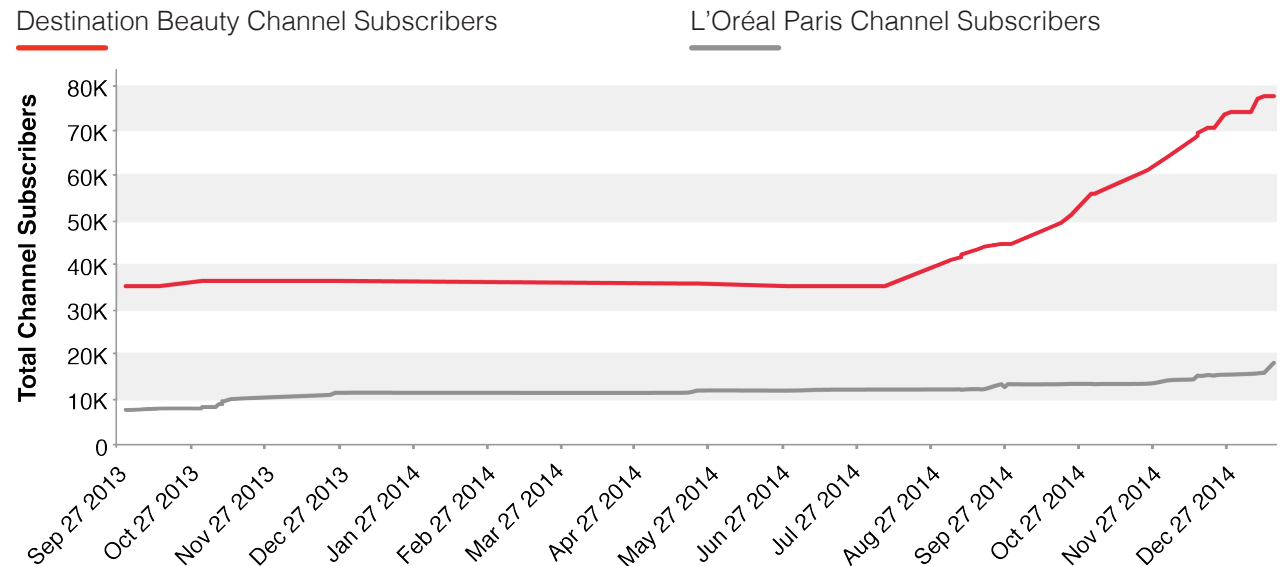
YouTube Success Story: L'Oréal Paris and Destination Beauty

L'Oréal Paris launched **Destination Beauty** with the goal of creating an all-inclusive beauty channel on YouTube for female millennials featuring content co-curated with an influential roster of beauty creators on YouTube.

- In August 2014, L'Oréal Paris' satellite beauty channel experienced unprecedented success when the innovative brand decided to convert its Destination Beauty channel from a brand channel into a brand-sponsored, creator-curated channel. (Figures 26 and 27)
- By analyzing in-depth data about its target audience's likes, dislikes, viewing schedules, and content preferences, L'Oréal Paris successfully transformed Destination Beauty into a highly relevant and popular YouTube beauty destination.
- **Destination Beauty's total number of channel subscribers has more than doubled since its August 2014 relaunch.** Its growth rate now exceeds the growth rate of L'Oréal Paris' official brand channel. (Figure 28)

Top beauty brands on YouTube are ranked on the following page by total channel views in Figure 29, and are shown relative to one another in Figure 30.

Brand-Sponsored Channel Subscriberhip Compared With Official Brand Channel Subscriberhip



Top 25 YouTube Beauty Brand Channels

by Total Views

Rank	Brand	Channel Views	Rank	Brand	Channel Views	Rank	Brand	Channel Views
1	CHANEL*	168,807,411	9	Dermablend Pro	52,637,049	17	Schwarzkopf	27,633,844
2	Dove	145,685,381	10	Giorgio Armani Beauty	38,861,077	18	Gucci*	23,523,173
3	Victoria's Secret*	134,487,102	11	Sephora	38,718,997	19	Head & Shoulders	23,007,759
4	Dior*	99,293,779	12	Maybelline New York	38,641,260	20	aveeno	22,301,134
5	Calvin Klein*	76,401,337	13	Clean and Clear	36,551,685	21	Diesel*	21,393,322
6	CoverGirl	73,065,925	14	Garnier	35,119,663	22	Olay	21,270,268
7	Dolce & Gabbana*	62,309,943	15	I Love Makeup	34,208,705	23	Revlon	20,505,853
8	Burberry*	57,848,239	16	Pantene	33,822,036	24	L'Oréal Paris	19,791,620
						25	e.l.f. Cosmetics	17,786,324

Top 25 YouTube Beauty Brand Channels

by Total Audience Engagements

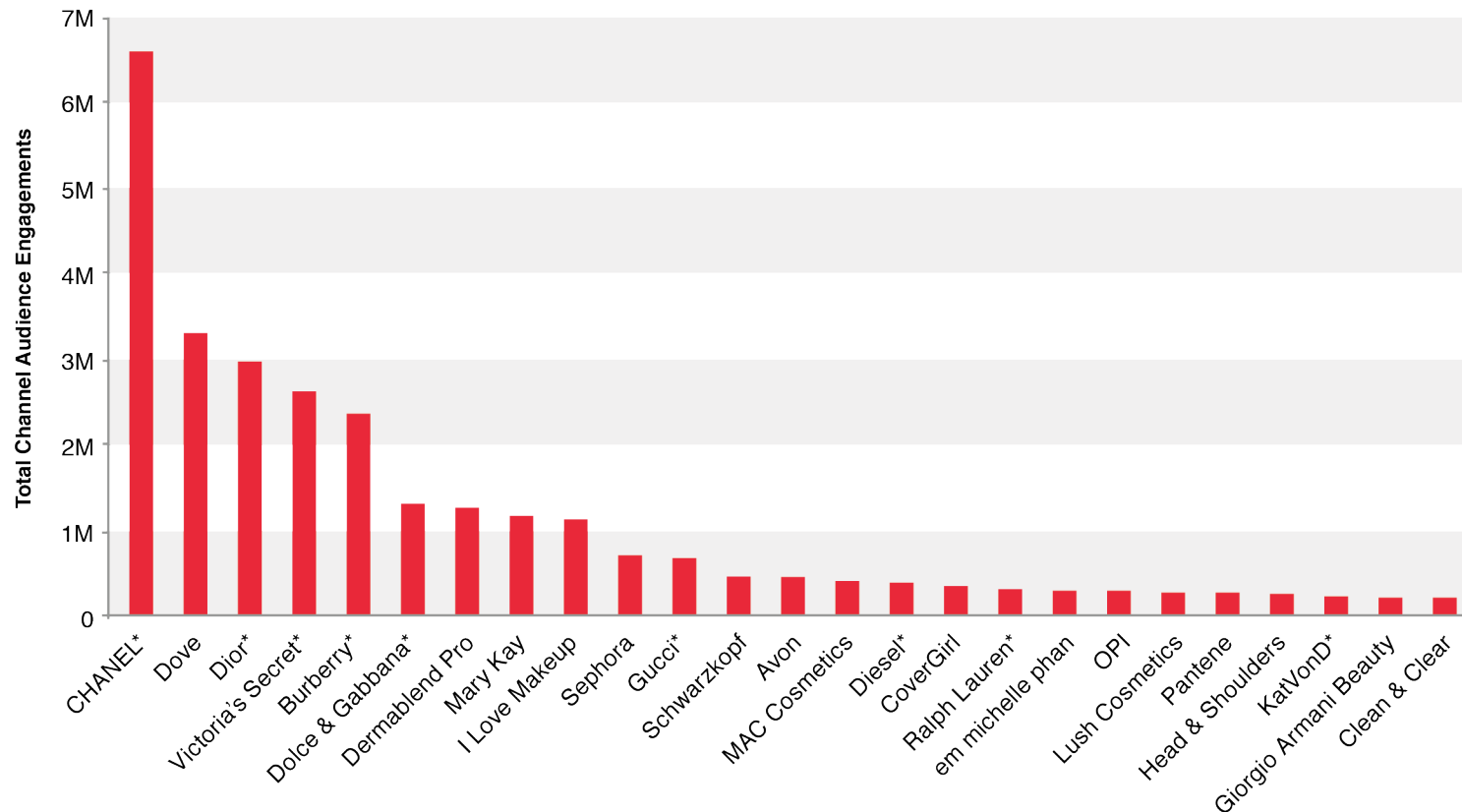


Figure 29. Top beauty brands on YouTube, ranked by total channel views. Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Figure 30. Top beauty brands on YouTube, ordered by total audience engagements from left to right. Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Deep Dive: Beauty Tutorials

YouTube's beauty viewers prefer how-to tutorials above all else

Long-form YouTube beauty content such as **how-to tutorials**—detailed videos that walk a viewer step-by-step through how to create a specific look—earn higher audience engagement numbers and drive significantly more page views on YouTube than 30-second commercials. *(Figure 31)*

Although beauty content on YouTube is distributed across the 5 different topic categories and 18 different subcategories previously defined in this study, tutorial content dominates.

- **Tutorial videos** make up **45% of all YouTube beauty videos**. *(Figure 32)*
- As of April 2015, there are **802,771 beauty tutorials** on YouTube.

Relative Levels of Audience Engagement
per YouTube Beauty Video Format

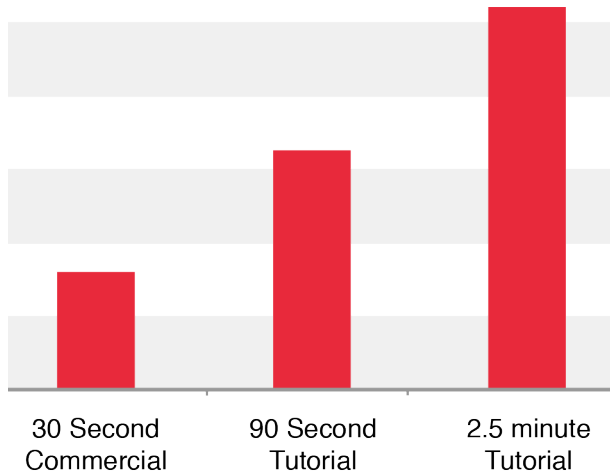


Figure 31.
Long-form YouTube beauty content, such as tutorials, earn higher audience engagement numbers and drive more page views on YouTube than short commercials.

Distribution of YouTube Beauty Videos
by Subcategories

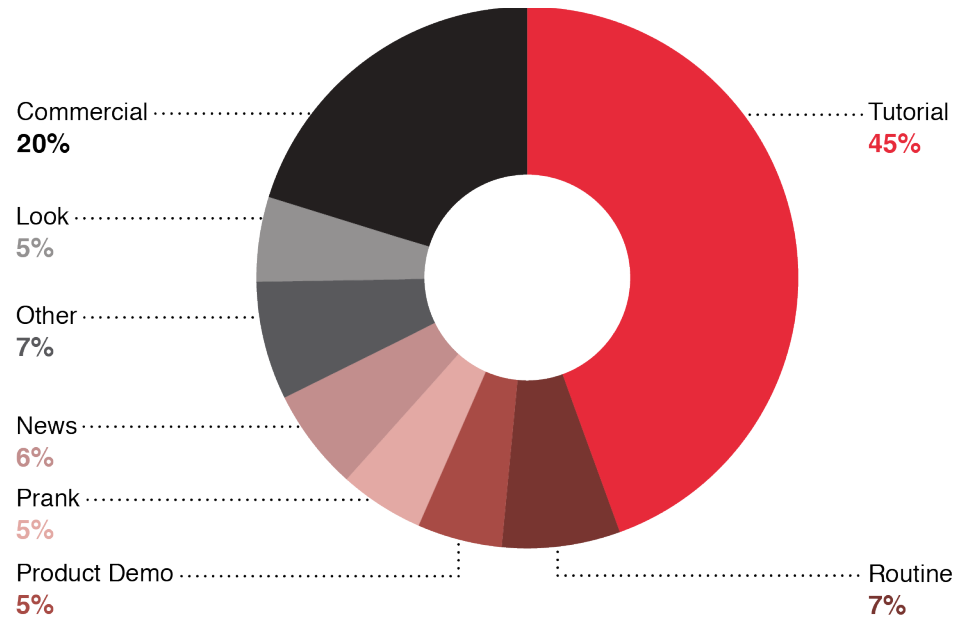


Figure 32.
How-to tutorial videos remain the most prevalent subcategory of YouTube beauty content. How-to tutorials make up 45% of all published hair, makeup, skincare, nails, and perfume beauty videos.

Full-Face Makeup and Hair Tutorials Capture 66% of All Tutorial Views

Within YouTube's top beauty tutorials, full-face makeup tutorials and hair tutorials together attract over 66% of all tutorial views. (Figure 33) A **full-face makeup tutorial** is a video that walks the viewer through all necessary steps to create a Kim Kardashian look or *Frozen's* Princess Ana look, for example.

- **Full-face makeup tutorials** attract 45% of top tutorial views.
- **Hair tutorials** attract 24% of top tutorial views.
- **Eye makeup tutorials** attract 15% of top tutorial views.
- **Body makeup tutorials** attract 7% of top tutorial views.
- **Lip makeup tutorials** attract 5% of top tutorial views.
- **Skincare tutorials** attract 2% of top tutorial views.
- **Nail tutorials** attract 2% of top tutorial views.

Relative Views of Top YouTube Beauty Tutorials

by Category

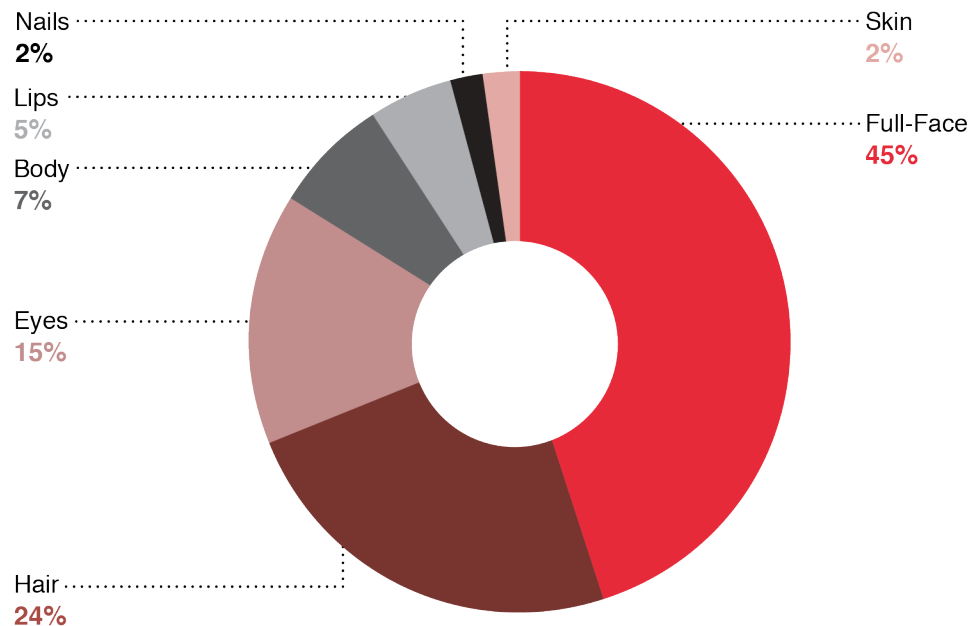


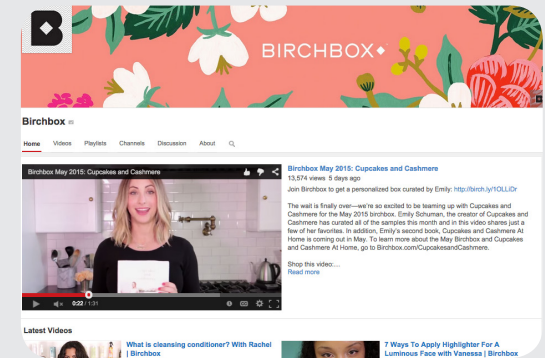
Figure 33.

Full-face makeup tutorials attract 45% of YouTube beauty tutorial views, followed by hair tutorials (24%), eye makeup tutorials (15%), body makeup tutorials (7%), lip makeup tutorials (5%), skincare tutorials (2%), and nails tutorials (2%).



Birchbox Case Study

491 Videos
9,982,056 Views
56,745 Subscribers



Birchbox bills its brand channel as a source of beauty and lifestyle tips and tricks from in-the-know editors, with guest appearances by celebrity hairstylists and makeup artists.

Birchbox's **tutorial videos** are viewed more than any other video type.

"Rachel's Favorite Workout: Brooklyn Body Burn | Birchbox"

1,757 Views (non-tutorial)

"How To: Get Serena van der Woodsen GOSSIP GIRL Waves"

151,392 Views (tutorial)

"Birchbox How To: Hollywood Waves"

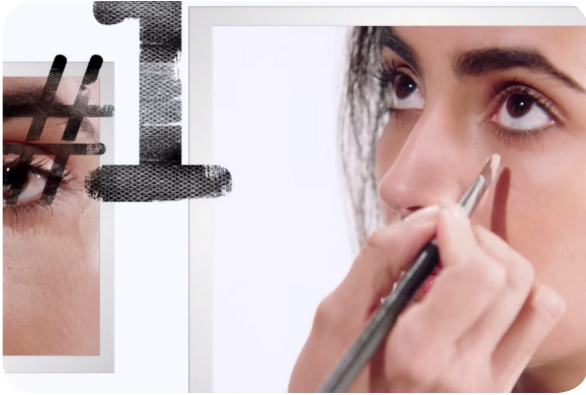
145,156 Views (tutorial)

"Our Favorite 5-Minute Holiday Updo Hairstyle"

137,508 Views (tutorial)

"How To: GOSSIP GIRL Neutral Cat-Eye"

105,669 Views (tutorial)



A screenshot from a full-face YouTube makeup tutorial sponsored by MAC Cosmetics.

Sponsored Beauty Tutorials Are Effective But Underutilized by Brands

Although tutorial videos make up 45% of YouTube's beauty content, only **3.5% of all tutorials are sponsored by beauty brands.** (Figure 34)

- **21% of full-face makeup tutorials** are brand-sponsored. (Figure 35)
- A small percentage of beauty brands own **lightly branded, secondary YouTube channels featuring beauty creators and tutorial content.** These brand-sponsored, creator-populated channels frequently drive stronger audience engagement than official brand channels. (See the Case Study on the following page.)

Beauty Tutorials on YouTube

Sponsored by Beauty Brands

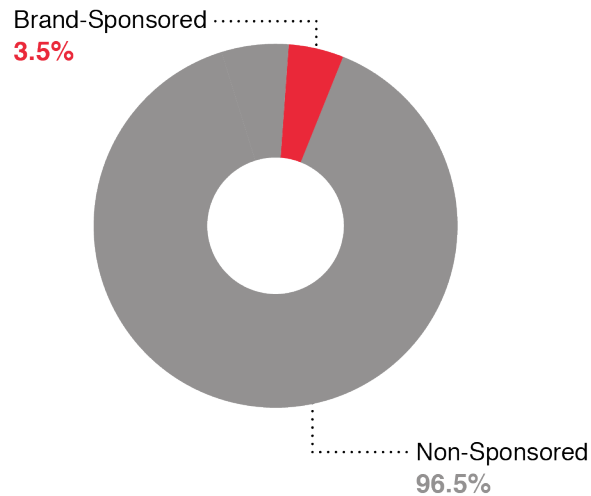


Figure 34.
Within YouTube's collection of beauty tutorial videos, 3.5% of tutorials are sponsored by beauty brands.

Full-Face Makeup Tutorials on YouTube

Sponsored by Beauty Brands

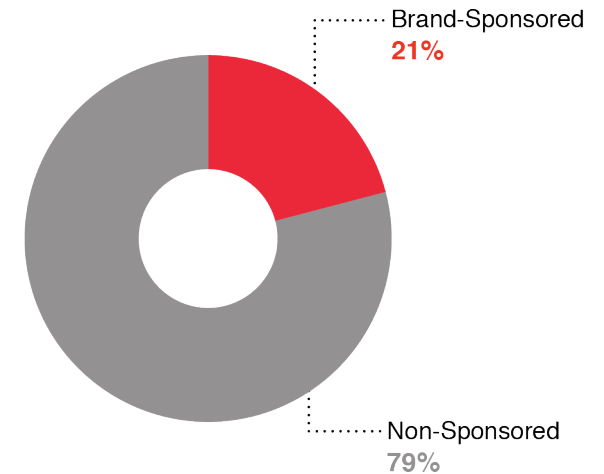


Figure 35.
Twenty-one percent of full-face makeup tutorials are sponsored by beauty brands.

Case Study: I Love Makeup and Bobbi Brown



ilovemakeupOFFICIAL

34,063,692 Views
426,641 Subscribers



bobbibrown

4,773,835 Views
53,621 Subscribers

In April 2013, the global makeup brand Bobbi Brown started a second YouTube channel, ilovemakeupOFFICIAL, to host creator-produced tutorial content featuring Bobbi Brown products. The ilovemakeupOFFICIAL channel has drawn **600% more views, 700% more subscribers, and 250% more shares** than the brand's official bobbibrown channel. (Figure 36)

- **ilovemakeupOFFICIAL** increased its subscriber base **235%** between January 2014 and April 2015.
- **bobbibrown** increased its channel subscriber base **83%** during the same time period. (Figure 37)

The success of ilovemakeupOFFICIAL led the Estée Lauder Companies to add other brands to the channel's mix beyond Bobbi Brown.

Total Channel Subscribers Over Time

ilovemakeupOFFICIAL Channel Subscribers

bobbibrown Channel Subscribers

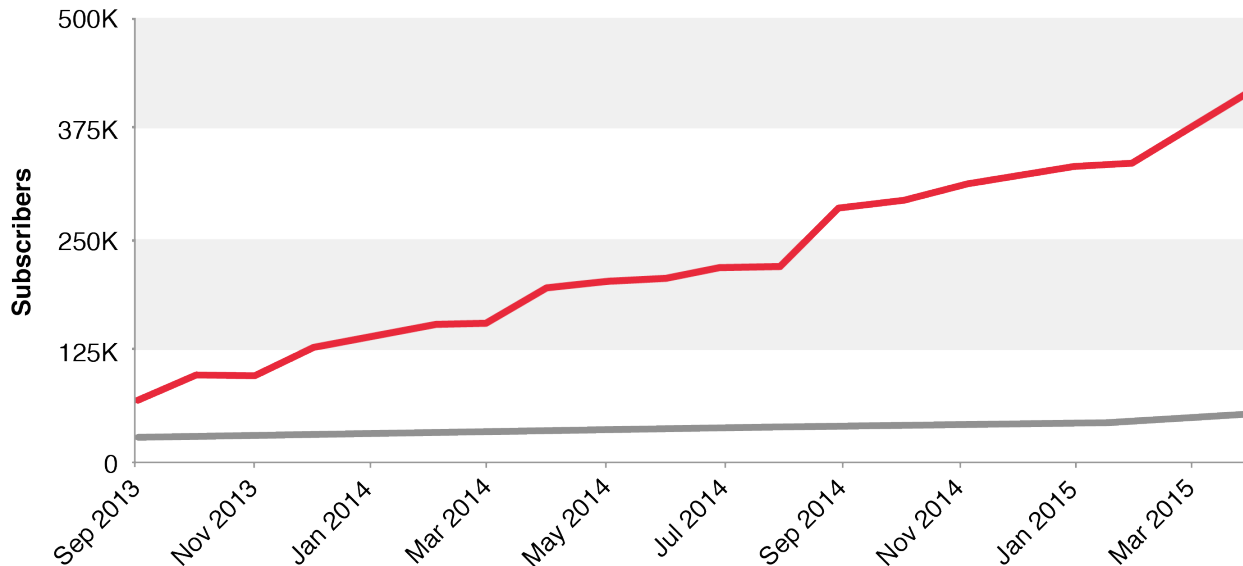


Figure 37. I Love Makeup increased its subscriber base 235% between January 2014 and April 2015. Bobbi Brown increased its subscriber base 83% during the same period.

Total Channel Views and Channel Shares

Channel Views and Shares

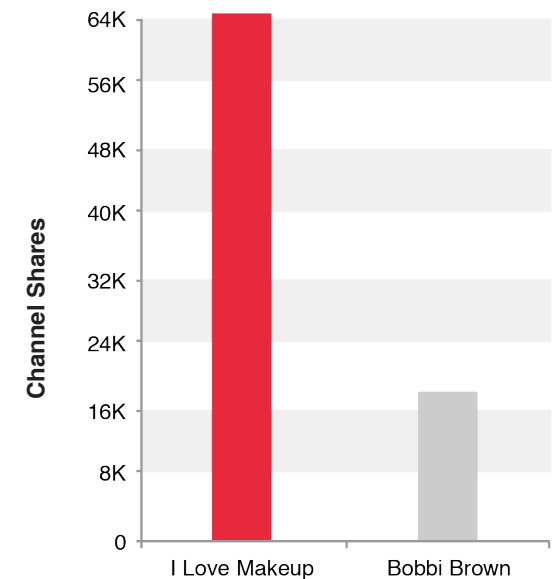
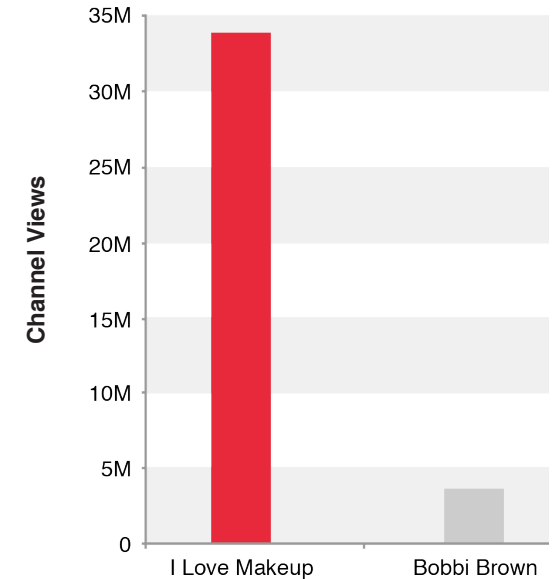


Figure 36. The ilovemakeupOFFICIAL YouTube channel has 600% as many views and 250% as many shares as bobbibrown.

Deep Dive: Makeup on YouTube

Makeup is the most prevalent and popular beauty content category on YouTube

Makeup videos outnumber any other category of beauty video on YouTube. As of April 2015, there are a total of **902,553 makeup videos** available on YouTube. (Figure 39) Long-form makeup tutorials are highly popular on YouTube and **suit the highly visual and complex nature of creating a movie or music video look**, such as the complicated look worn by Lady Gaga in her *Bad Romance* music video.

Beauty brands hold a strong presence within YouTube's makeup category given that it is one of the platform's oldest and most developed beauty categories.

- Among US makeup brands present on YouTube, **CoverGirl** ranks first according to total channel views with **73 million views**.
- CoverGirl is followed by **Dermablend Pro** with **53 million total views**, **Lancôme** with **46 million total views**, and **L'Oréal Paris** with **41 million total views**. (Figure 38)

These makeup brand channel view counts pale in comparison to those of YouTube beauty creators; Michelle Phan's popular tutorial video on how to recreate Lady Gaga's *Bad Romance* look has a lifetime total of **50 million views**.

Top 10 US Makeup Brands on YouTube

by Total Channel Views

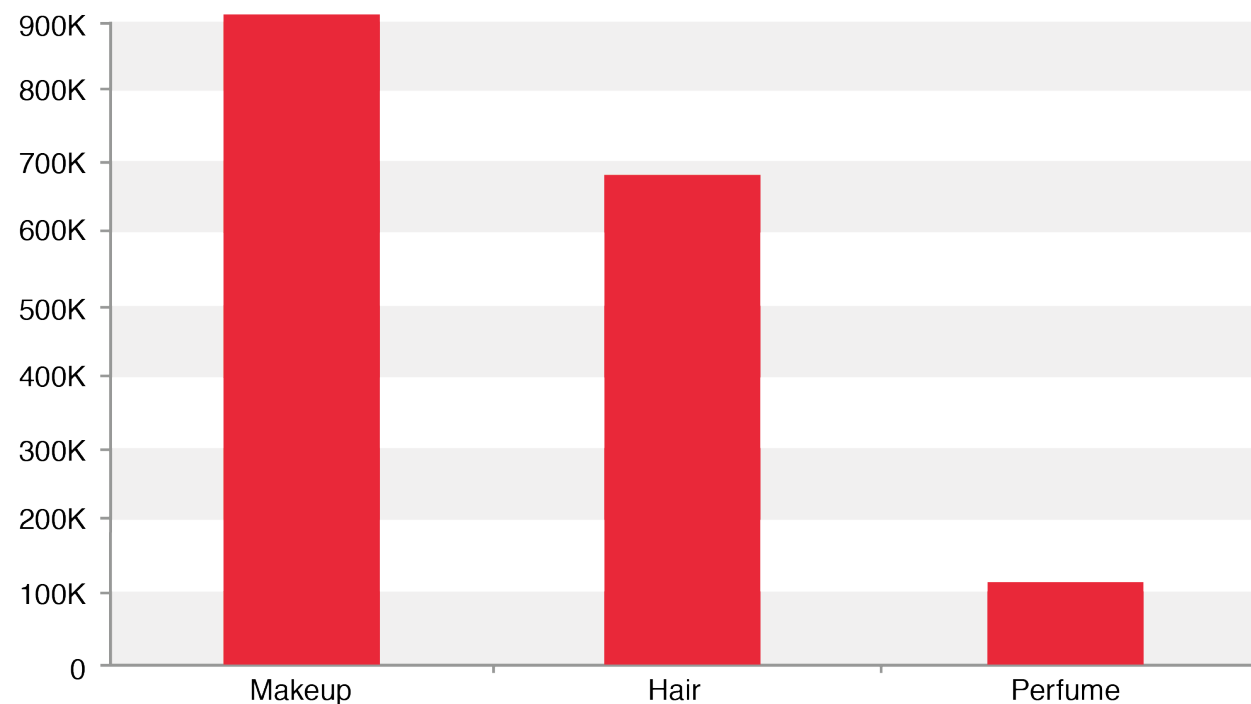
Rank	Brand	Views
1	CoverGirl	73M
2	Dermablend Pro	53M
3	Lancôme	46M
4	L'Oréal Paris	41M
5	Sephora	39M
6	Maybelline New York	39M
7	Giorgio Armani Beauty	39M
8	aveeno	22M
9	Olay	21M
10	Revlon	21M

Figure 38.
YouTube's top ten US makeup brands, ranked by total YouTube channel views.

Figure 39.
Makeup videos are the most prevalent category of beauty video available on YouTube.

Total YouTube Beauty Videos Available

by Category



High Growth Segment: Mature Beauty on YouTube

Mature Beauty on YouTube as of April 2015

7,397

Total channels

3,840,769

Likes

313,791,206

Total views

1,378,561

Facebook shares

33,470

Total videos

175,640

Tweets

427,441

Total subscriberships

The growth of mature beauty on YouTube is significantly outpacing beauty overall

A previously under-populated niche segment of beauty on YouTube—**mature beauty content targeting an audience over 45**—may hold the key to critical future growth for beauty brands.

Interest in mature beauty routines and reviews of anti-aging skincare products aimed at **mature beauty viewers over 45** is growing on YouTube, as evidenced by a sudden rise in monthly views in early 2013.

- Beauty videos targeting a mature beauty audience now account for **1.9%** of all YouTube beauty videos.
- The **33,470** YouTube videos featuring mature beauty solutions have attracted **313.8 million total views**.
- **Beauty on YouTube experienced a 50% growth rate** in views from January 2014—April 2015.
- **Mature beauty experienced an 81% growth rate** in views from January 2014—April 2015. (*Figure 41*)
- **Monthly views of the mature beauty segment on YouTube are growing significantly faster** than monthly views of YouTube's beauty content overall.

Mature Beauty Content on YouTube

Monthly Views Over Time

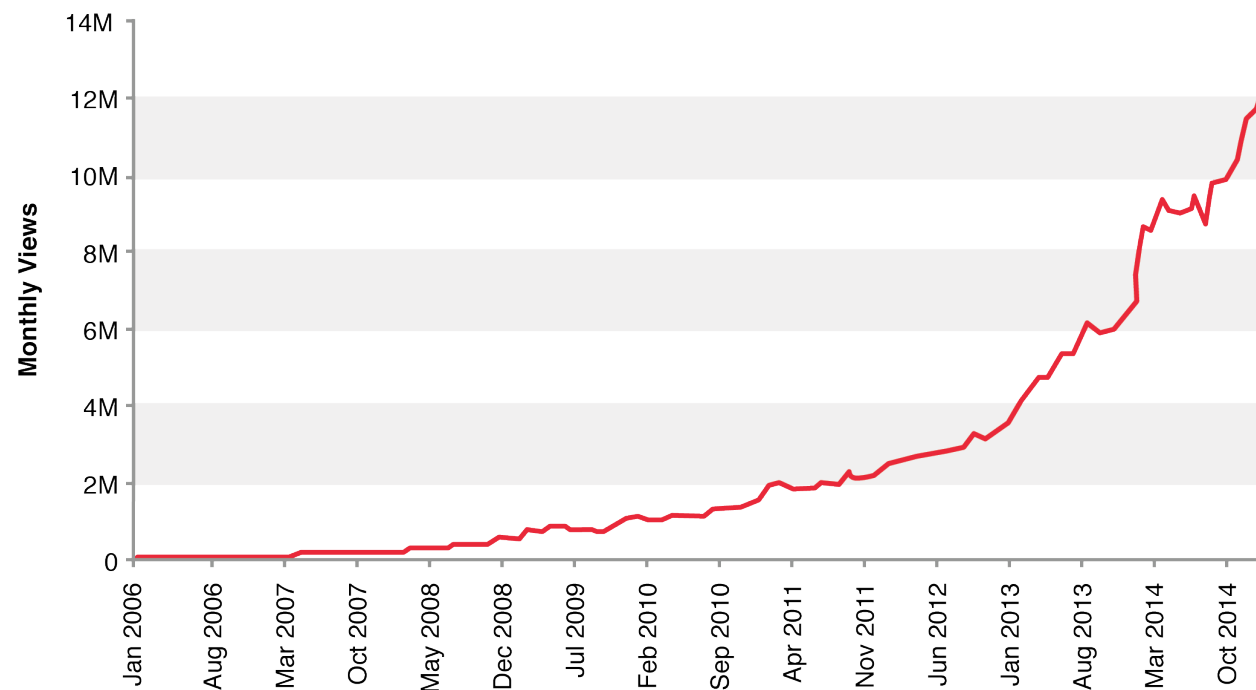


Figure 41.

Views of mature beauty content have accelerated since January 2013. As of April 2015, mature beauty views make up 0.7% of all YouTube beauty views.

Tutorials and Commercials Dominate Mature Beauty on YouTube

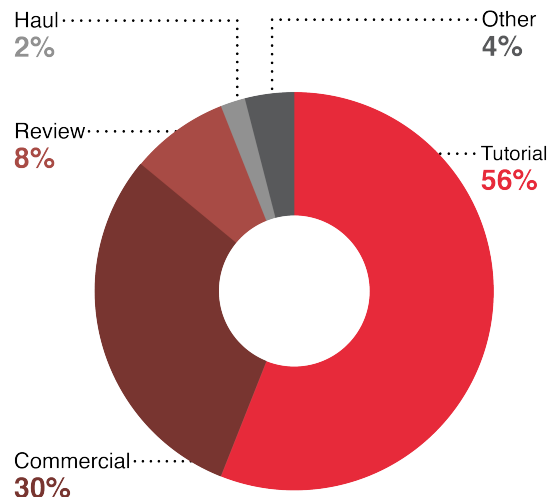
The majority of YouTube's mature beauty space is populated by beauty creators and their channels. An analysis of YouTube's top mature beauty videos shows that the category is tutorial-heavy. **56% of mature beauty videos are tutorials** versus 45% in the overall YouTube beauty space. (Figure 43)

- **Mature beauty content creators focus on skincare tutorials** while brand-produced videos typically include **celebrity endorsements of premium products**.
- **Unboxing videos and product review videos**—popular YouTube beauty formats—are not common within YouTube's mature beauty space.

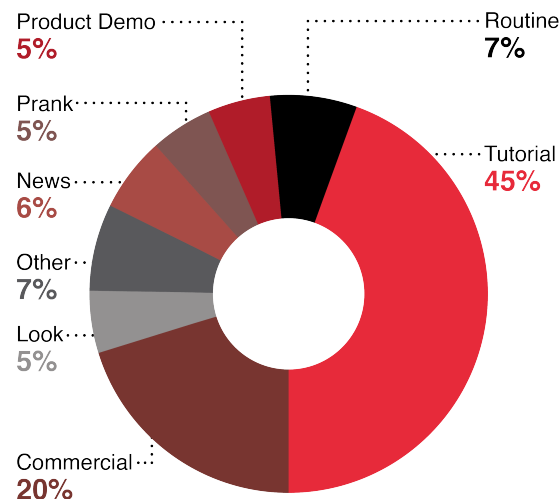
Mature beauty videos on YouTube average **54,150 views per video**.

- Commercials account for a disproportionately large portion of the mature beauty space: **30% of mature beauty videos are commercials versus 20% of YouTube's general beauty space**.
- Seven brand channels make the list of YouTube's top 100 mature beauty channels.
- **Mature beauty content owns 427,441 of YouTube's overall 123 million beauty subscriberships**. (Figure 42)

Categorization of Mature Beauty Content



Categorization of Overall Beauty Content



Mature Beauty | Share of Beauty Subscriberships

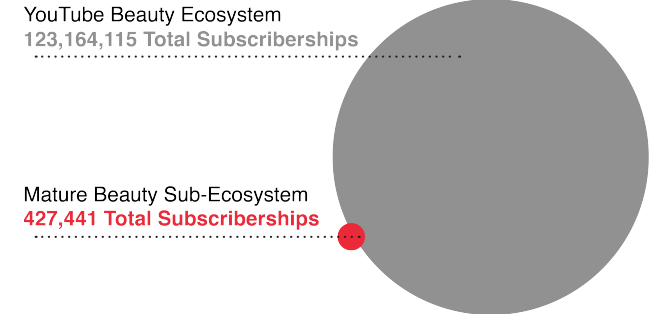


Figure 42.
Total mature beauty subscriberships relative to total YouTube beauty space subscriberships.



Many brand-produced videos in the mature beauty space feature celebrity spokespeople, like this screenshot featuring actress Katie Holmes for Olay.

Figure 43.
Tutorials and commercials attract a disproportionate percentage of the mature beauty space on YouTube, compared to overall beauty on YouTube.

High Growth Segment: Men's Grooming on YouTube

Men's grooming content on YouTube has attracted 28.5 million subscribers and 0.85% of all beauty views on YouTube.

Modern men turn to YouTube's grooming content for shaving and hairstyle how-tos

As of April 2015, **11% of YouTube's beauty viewers are male**. Men's beauty content on YouTube, better known as men's grooming content, is a rapidly expanding, high-growth niche vertical. Content typically includes hair videos, shaving videos, style tips, and celebrity-inspired look tutorials.

- Monthly views of men's grooming content on YouTube doubled from November 2013 to May 2014. As of April 2015, **men's grooming content has attracted 383 million total views**. (Figure 44)
- Men's grooming videos make up **2.6%** of all beauty content on YouTube, and have attracted **0.85%** of all YouTube beauty views. (Figure 46)
- Men's grooming channels have **28.5 million total subscribers**—an average of **8,530 subscribers per channel**.

YouTube's 3,341 men's grooming channels have generated:

- 45,870 videos
- 3,258,619 Likes
- 691,439 Facebook shares
- 164,863 Tweets

Men's Grooming Content on YouTube

Monthly Views Over Time

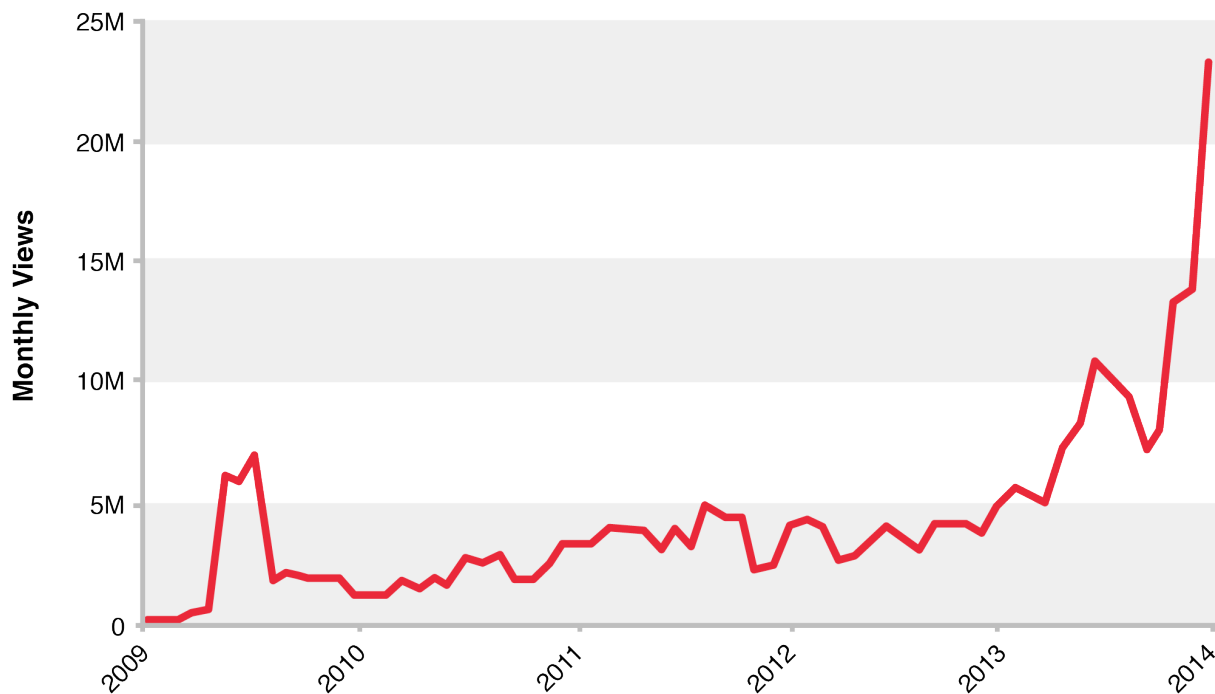


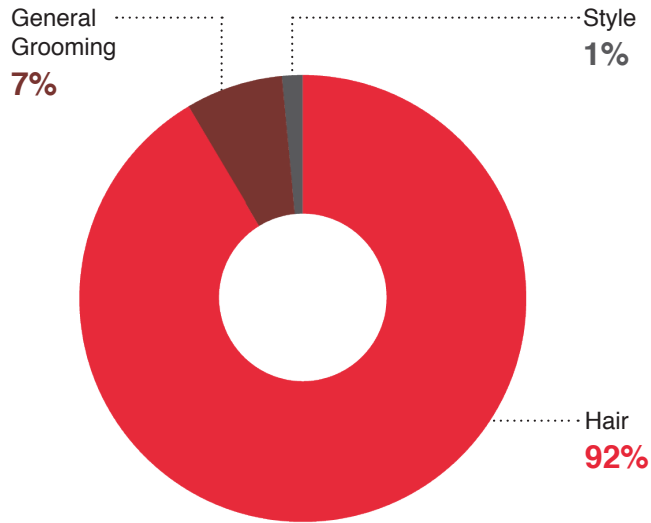
Figure 44.

The rise in popularity of men's grooming content on YouTube coincides with the spike in views beginning in late 2013 depicted on the graph to the right.

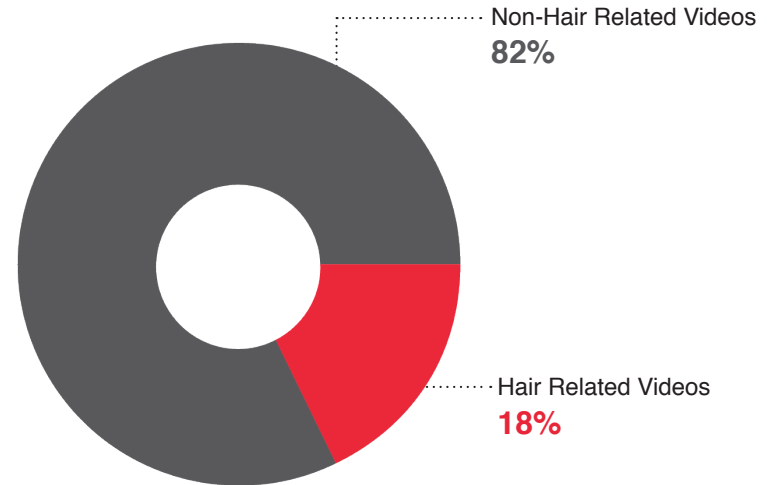
Hair Content Dominates Men's Grooming on YouTube

92% of views within men's grooming space on YouTube are of videos demonstrating **how to cut or style men's hair**. Within YouTube's overall beauty ecosystem, views of hair-related videos account for just **18%** of the space. General grooming topics make up **7%** of men's grooming views, followed by style with 1% of views. (Figure 45)

Men's Grooming Ecosystem: Views per Subcategory



Overall YouTube Beauty Ecosystem: Views per Subcategory



2015 Men's Grooming YouTube Ecosystem | Share of Voice

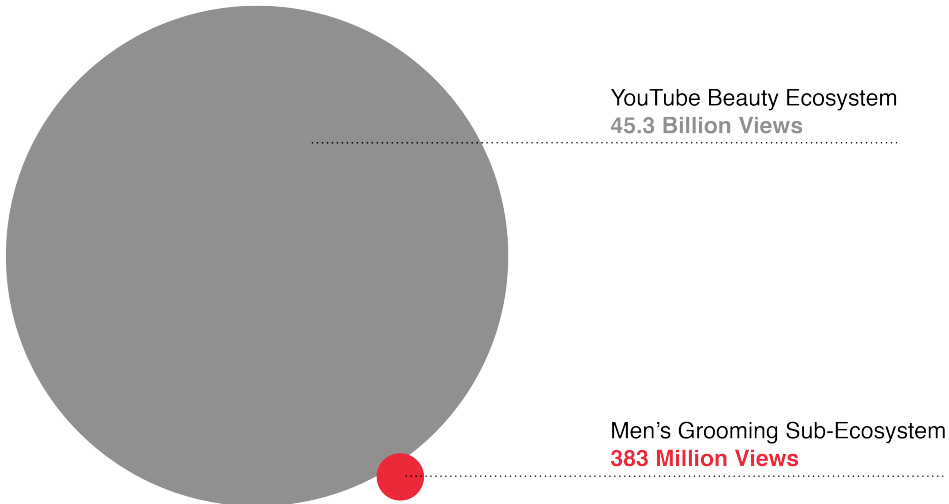


Figure 45.

Men's grooming content is predominantly hair-related; 92% of YouTube's top male grooming video views are dedicated to hair versus just 18% of views within overall beauty on YouTube.

Figure 46.

Men's grooming content on YouTube has attracted 383 million views; 0.85% of YouTube's total beauty views.

Top 10 Men's Grooming Channels on YouTube

by Views

Rank	Channel	Total Views
1	mhrrasmus	146M
2	j1mmyb0bba	108M
3	Gillette	72M
4	JumbaFund	63M
5	AlphaMconsulting	49M
6	jairwoo	19M
7	CuteHair101Class	17M
8	joeisblu	15M
9	toniguy	14M
10	DanielAlfonsotv	9.5M

Figure 47.

Gillette is one of only two brands to make the top 10 list ranked by total views within men's grooming on YouTube.

Total # of Men's Grooming Videos Published

(March 2014—March 2015)

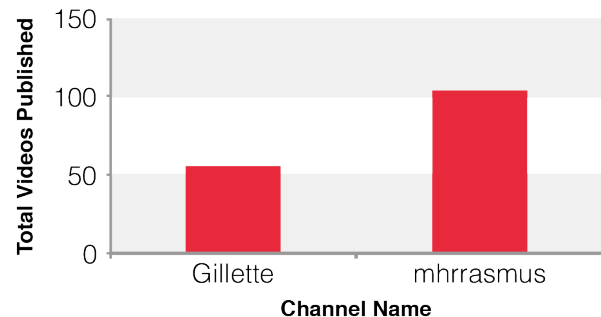


Figure 48.

The publishing schedule of Gillette versus independent creator mhrrasmus demonstrates that men's brands need to produce additional content to catch up to creators.

Figure 49.

Of the top 100 men's grooming videos on YouTube, 96% are videos dedicated to general and celebrity-inspired hairstyles or shaving tips and techniques.

Men's Grooming Brands Need to Publish More to Catch Up to YouTube Creators

YouTube's top ten men's grooming channels own **4.4%** of YouTube's 123 million beauty subscriberships. Gillette has the most views of any men's grooming brand. (Figure 47)

Men's hairstyling creator channel **mhrrasmus** has **146 million total views** within men's grooming and ranks first within the category according to total channel views.

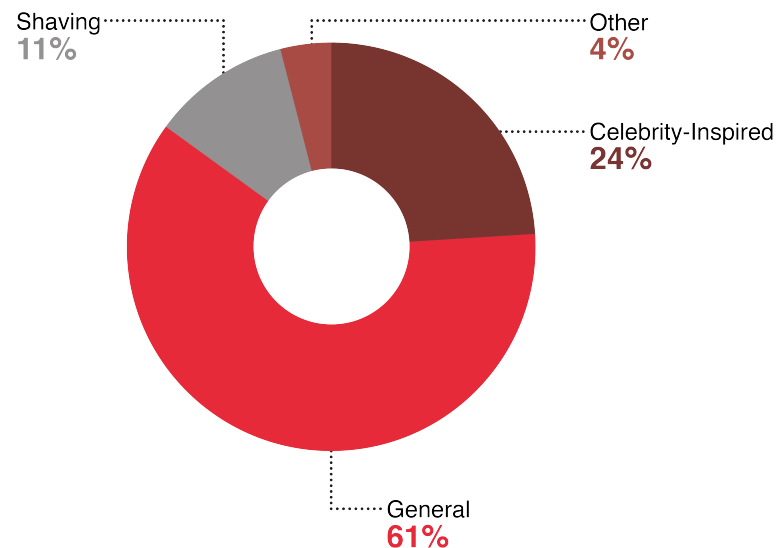
- The **mhrrasmus** channel (better known as SlikhaarTV) is focused on styles and professional tips to optimize men's hair and overall style. "Every week we give you new hairstyle inspiration: Tutorials, how to videos, celebrity and footballer hair. Stay tuned and remember to tell us what you want to see next."
- **mhrrasmus** published **108 new men's grooming videos** to YouTube between March 2014 and March 2015. Gillette published **59 new men's grooming videos** between March 2014 and March 2015. (Figure 48)
- Gillette originally published new men's grooming content to YouTube every **3.6 days** on average. After the brand's content publishing slowed, the hairstyling channel founded by twin brothers Emil and Rasmus became YouTube's top men's grooming channel with new content releases every **6.1 days** on average.

Of the top 100 men's grooming videos, 96% are dedicated to general and celebrity-inspired hairstyles or shaving.

(Figure 49) In addition to male creators, female creators also publish hair and grooming videos for YouTube's growing audience of male grooming viewers. Both **CuteHair101Class** and **GirlsHairstyles2012** have high-ranking videos for relevant men's grooming search terms on YouTube.

Most Viewed Men's Grooming Hair Videos

by Type



Short-Form Commercials Are the Most Viewed of All Men's Grooming Video Content

Short-form content makes up only **0.5%** of all available men's grooming content on YouTube. (Figure 50) Nonetheless, **short-form content receives the majority of audience views within the men's grooming space** on YouTube. (Figure 51)

Men's grooming brands should leverage viewer preferences to create short-form commercials that fill the gap between men's grooming audience demands and existing content supply. Brands are experiencing strong performance within the emerging men's grooming space. (See sidebar)

Video Length Distribution of Top 1,000 Male Grooming Videos

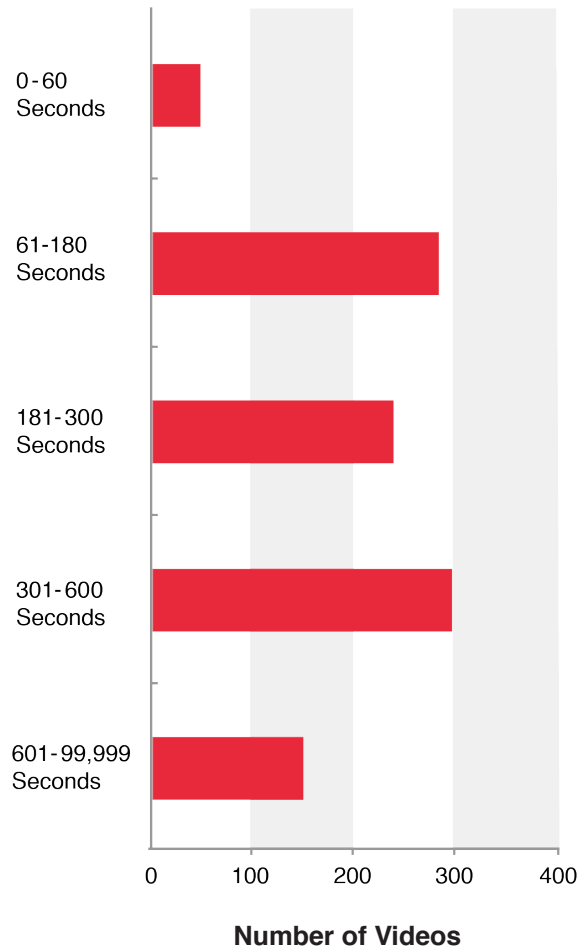


Figure 50. Short-form content under 60 seconds in length makes up 0.5% of all existing men's grooming content on YouTube.

Average Views Per Video Length of Top 1,000 Male Grooming Videos

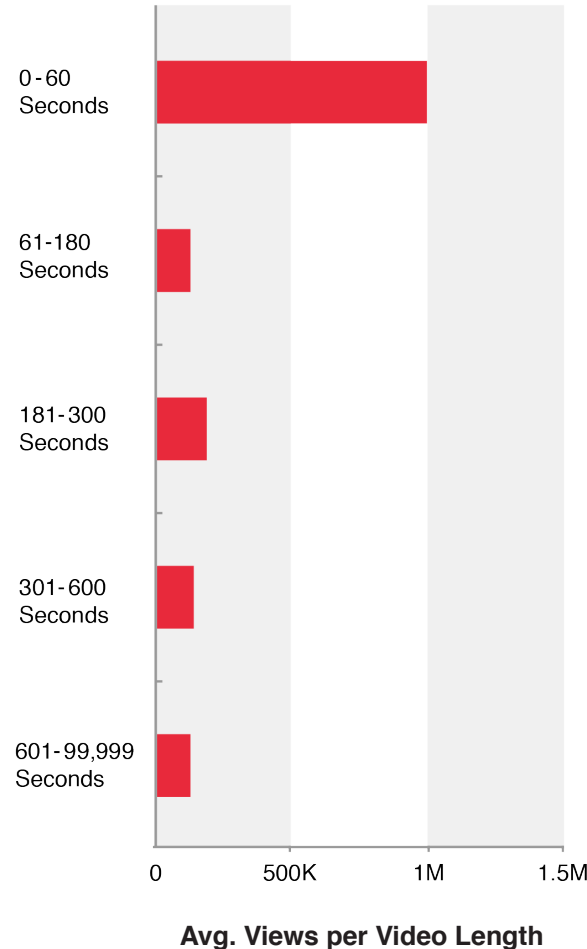


Figure 51. Short-form content receives the majority of audience views within YouTube's male grooming space.

First Mover Advantage: Men's Grooming Brands on YouTube

Men are turning to brands on YouTube for grooming tips and tutorials, and to educate themselves about the latest trends in fragrances and hair and skincare products.



Gillette is a brand leader among men's grooming channels on YouTube. Gillette owns YouTube's number-one men's grooming video, "100 Years of Hair."



Bioelements features product demonstrations and videos about professional treatments. The videos are informative and of high-production value. The channel's "Bioelements Facial for Men" video has the highest viewership, with 129,842 total views.



Baxter of California has How-to haircut, skincare, and shaving tutorials for men (featuring Baxter of California products) that generated more than 700,000 views.

Top 25 Men's Grooming Videos on YouTube

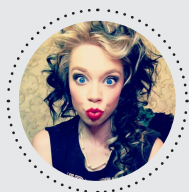
Ranked by Total Views per Video as of April 2015

Rank	Brand or Creator	Video Title	Views	Engagements	Social Shares
1	Gillette	100 Years of Hair Gillette BODY Razor Commercial	13,582,518	9,006	5,258
2	Gillette	How to Shave Your Groin	6,338,169	44,870	33,487
3	mhrasmus	Cristiano Ronaldo Hairstyle 2012 side cut with razored parting	5,990,043	34,785	15,654
4	mhrasmus	Hairstyle Like Cristiano Ronaldo CR7 Slikhaar TV 2014 Men's Hair Inspiration	5,894,126	16,474	3,011
5	mhrasmus	David Beckham H&M 2013 Men's Hairstyle How To Style Inspiration by Vilain	4,549,690	27,632	5,881
6	Gillette	Mercy rule in shaving? Gillette Fusion ProGlide with FlexBall Technology	4,058,211	3,924	1,028
7	joeisblu	Disconnected Undercut - Haircut and Style (Actual Haircut Footage)	4,042,958	32,598	8,099
8	mhrasmus	Cristiano Ronaldo Inspired Haircut Tutorial How To Style & Cut A Football Soccer Hairstyle	3,415,198	22,129	8,981
9	mhrasmus	Miguel Veloso Hairstyle Men's Football Player Hair Tutorial Slikhaar TV	3,164,225	25,456	5,061
10	mhrasmus	How to Style Your Hair Like Justin Timberlake New Short Men's Hairstyle By Vilain	3,072,476	29,141	10,365
11	mhrasmus	How To Style Your Hair Like Marco Reus Fresh Men's Football Player Hair Tutorial	3,047,132	22,966	5,027
12	mhrasmus	Cristiano Ronaldo new summer haircut with Highlights 2013 - Slikhaar Studio	2,959,427	17,988	2,149
13	mhrasmus	Gareth Bale Hair Tutorial Men's Football Player Haircut & Hairstyle	2,806,914	27,523	3,658
14	Gillette	Innovation Film Gillette Rebuilt With Avengers-Inspired Technology	2,685,978	28,859	24,416
15	Gillette	Shaving Hallelujah Gillette Fusion ProGlide	2,547,068	182	129
16	mhrasmus	How to make a Cristiano Ronaldo Hairstyle Men's hair with short fringe Cool style by Slikhaar TV	2,538,923	17,772	3,708
17	Gillette	Son Lux and Gillette Razors Piano Performance Gillette Fusion ProGlide with FlexBall Technology	2,529,800	3,748	2,189
18	mhrasmus	Justin Bieber & Zayn Malik Inspired Men's Hairstyle Tutorial by Emil	2,345,882	18,050	884
19	mhrasmus	Zayn Malik hair - One Direction inspired hairstyle for mens hair - Spring hair 2012 - Slikhaar TV 24	2,262,551	10,280	1,697
20	jairwoo	ZAYN MALIK (ONE DIRECTION) HAIRSTYLE TUTORIAL / MEN'S STYLE	2,225,967	12,596	1,357
21	AlphaMconsulting	Choose The Best Hairstyle For Your Face Shape: How To Pick A New Men's Hair Style	2,133,222	13,514	601
22	mhrasmus	Justin Bieber Hair Tutorial Men's Celebrity Hairstyle By Vilain Gold Digger	2,049,275	19,223	3,205
23	mhrasmus	Neymar Inspired Hair Style From Cristiano Ronaldo Haircut Men's hair Tutorial by Slikhaar TV	2,039,468	10,945	3,553
24	Gillette	Aftermath Gillette Rebuilt With Avengers-Inspired Technology	1,989,144	2,443	1,711
25	mhrasmus	Spread The Word Slikhaar TV The Best Hair Tutorials For Men	1,918,274	1,713	806

Figure 52.

YouTube's top list of men's grooming videos, ranked by total views. Total audience engagements and social shares for each video are also shown in the columns to the right.

High Growth Segment: Cross-Over Beauty Content on YouTube



Creator Channel:
grav3yardgirl
Total Subscribers: 4.9M
Total Views: 622M
Total Videos: 845

The relatively new YouTube creator **grav3yardgirl** increased her subscriber base **172% from January 2014—April 2015 to a total of 4,940,418 subscribers.**

grav3yardgirl incorporates comedy into almost every beauty video she creates and showcases her distinctive personality in each of her videos. She caters to an audience that is mostly ignored by other creators: those interested in **non-mainstream** and **cost-conscious fashion.**

Figure 53.
Cross-over beauty content (such as Beauty + Comedy) receives more average views, Likes, and Facebook shares per video than beauty-only content on YouTube.

Beauty + Fashion and Beauty + Comedy videos outperform beauty-only content

As YouTube's beauty ecosystem becomes increasingly crowded, some beauty brands and creators have expanded across the vertical's borders into adjacent verticals such as comedy and fashion.

YouTube videos that feature Beauty + Comedy or Beauty + Fashion lead in audience engagement with **530% more views** per video, **670% more Facebook shares** per video and **700% more average Likes** per video than beauty-only video content. (Figure 53)

Beauty + Comedy Cross-over Content

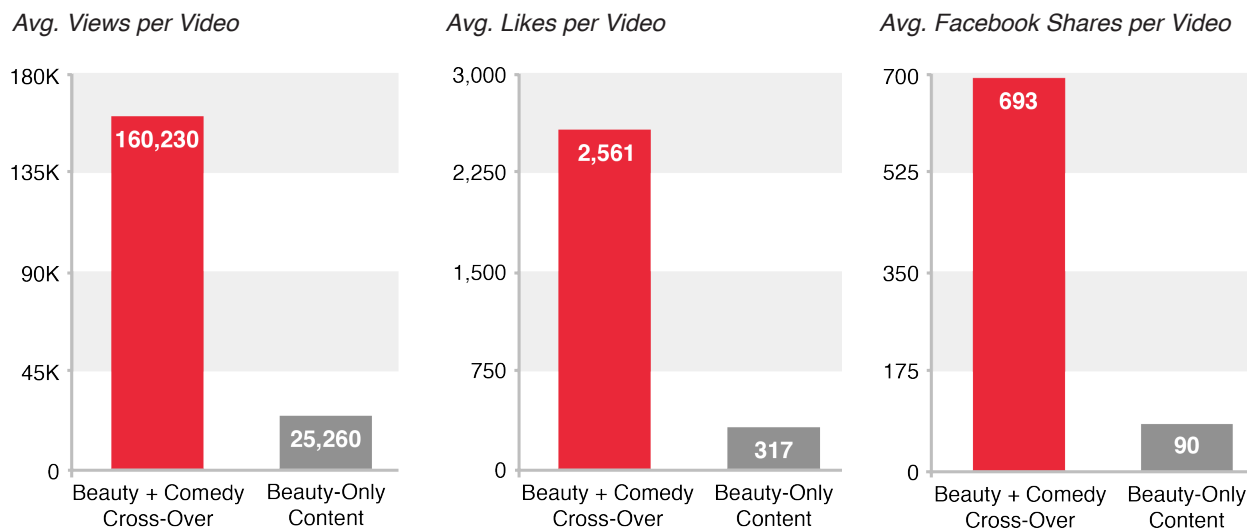
- **10,167 YouTube videos** can be categorized as Beauty + Comedy as of April 2015.
- Beauty + Comedy videos have generated a total of **1.5 billion views** as of April 2015.
- Beauty + Comedy + Fashion creator **grav3yardgirl** (Bunny Meyer) is an example of a rising YouTube cross-over content creator who **has a total of 4.9 million channel subscribers.** (See sidebar)

Beauty + Fashion Cross-over Content

As of April 2015, **fashion-only content on YouTube has generated a total of 17 billion views.**

- Because of the relatively low number of YouTube channels featuring fashion content compared to the high amount of channels focused on beauty, both brands and creators are opportunistically moving across the divide between fashion and beauty to capture additional views and subscribers.
- **pixi2woo** (Tanya Burr) is YouTube's top-ranked fashion content creator, but ranks thirteenth within YouTube's beauty ecosystem by total channel views. **pixi2woo** produces seasonal Lookbooks which include makeup, hair, and fashion tips.

Beauty + Comedy Cross-Over Video Content vs. Beauty-Only Video Content



Growth Opportunity: Hair on YouTube

Growing demand for YouTube hair videos exceeds existing supply

As of April 2015, **604,735 hair-related beauty videos** are available on YouTube. Hair is the only beauty category on YouTube in which **videos produced by brands receive significantly more audience engagements per video than those produced by creators: 80,000 average engagements per video.** (Figure 54) By contrast, creator hair videos receive only 10,000 average engagements per video.

Despite growing viewer interest in hair styling and tutorial videos, the demand for hair content exceeds the supply of available hair videos on YouTube. The lack of content presents an opportunity for beauty brands to boost engagement by producing hair-related videos.

- Hair videos make up **28%** of all beauty videos on YouTube.
- Hair videos attract **34%** of audience interest within YouTube's beauty space, second only to makeup. (Figures 55 and 56)

Average Audience Engagements Per Video

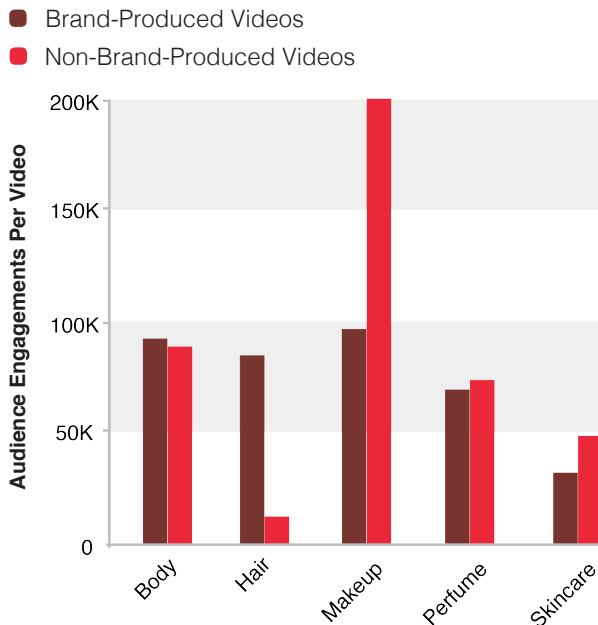


Figure 54.
Hair is the only one of YouTube's five beauty categories in which branded videos receive significantly more average engagements per video than creator videos.

Prevalence of YouTube Beauty Videos by Category

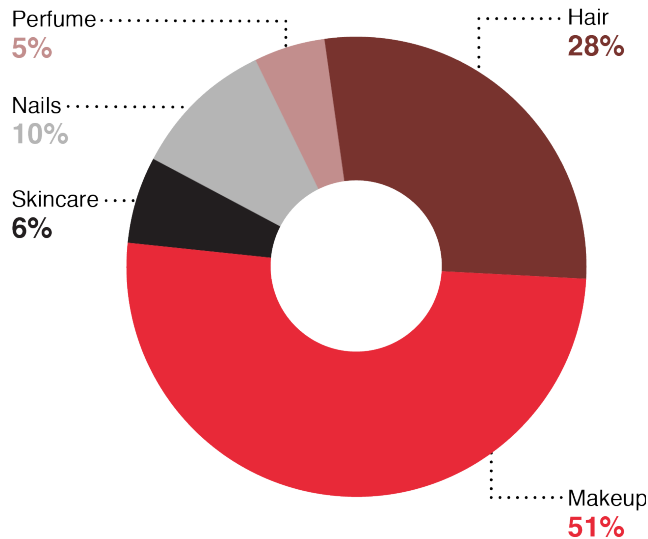


Figure 55.
Hair videos make up 28% of YouTube beauty videos.

Relative Beauty Audience Interest per Category

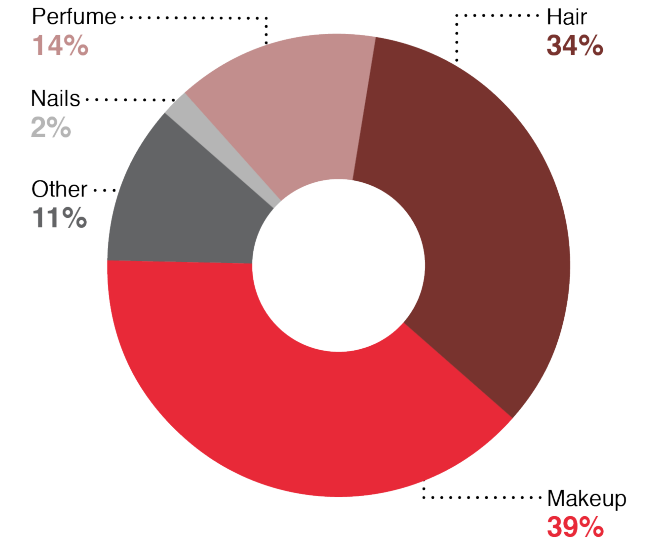


Figure 56.
Hair videos capture 34% of beauty audience interest.

The Growing Popularity of Black Hair Content on YouTube

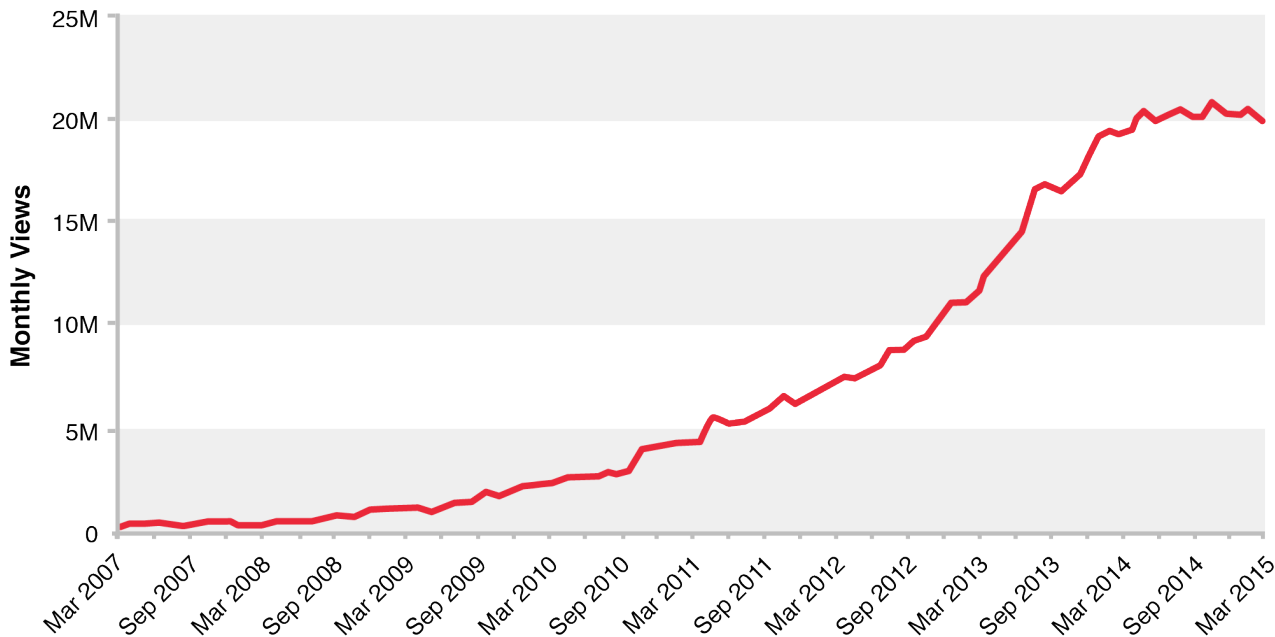
Views of hair-related beauty content are growing rapidly within select YouTube audience segments.

Monthly views of YouTube beauty content focused on Black hair are accelerating, along with views of hair-related men's grooming content.

- As of April 2015, Black hair content on YouTube has received **712 million total views**. (Figure 57)
- Black hair videos have attracted a total of **2.2 million audience engagements**.
- Monthly views of Black hair content on YouTube have increased **198% since 2012**.



Black Hair Content on YouTube: Monthly Views Over Time



Brand Channel:

CDTVonline

Total Views: 1,674,330

Subscribers: 33,948

Total Videos: 149

Hair-only YouTube beauty channels like **CDTVonline** (Carol's Daughter) are rapidly gaining views and subscribers. CDTVonline is a channel with a self-stated mission of "fulfilling the beauty needs of the diversity of skins that make up the tapestry of the modern world."

"Solange, Cassie, and Selita Talk Hair with Lisa Price"

95,259 Views

"The Curl' Episode Two: Porosity and The Chart"

49,445 Views

"The Curl,' Episode One: The Pompadour"

41,416 Views

"The Curl' Episode Three: My Mother's Hair and Bantu Knots"

36,866 Views

Figure 57. Monthly views of Black hair beauty content on YouTube are increasing rapidly over time.

Growth Opportunity: Perfume on YouTube



A Luxe Leader in Perfume Content on YouTube: CHANEL

Between January 2014 and April 2015, CHANEL increased its YouTube channel subscriber numbers by **133%**. CHANEL has the most audience engagements of any YouTube brand channel, with **6.6 million total engagements**.

Three CHANEL perfume commercials made the list of YouTube's top 25 beauty videos of all time, with more than 240,000 audience engagements each. (Page 50)



CHANEL N°5: The One That I Want - The Film 10.5M Views

Beauty brands hold a competitive edge within YouTube's perfume category

99.6% of YouTube's perfume-related views belong to beauty brands. Brand-produced perfume films with high production quality, sex appeal, well-developed story lines, and famous celebrities are the most common type of video within the perfume category.

Unlike makeup, perfume does not always lend itself well to visual demonstrations on YouTube. The most common variety of non-brand-produced videos within YouTube's perfume beauty category are **sponsored giveaway videos**, where beauty creators hold up and describe the perfumes being raffled off as prizes. Perfume review videos are the second most common variety of creator-produced video within the category. (Figure 58)

Some YouTube beauty creators find themselves constrained within the perfume category because of the high price point of individual perfumes. Unlike a drugstore makeup haul video which can feature as many as twenty products, regularly highlighting new perfumes involves a significant financial investment on the part of a YouTube beauty creator.



Figure 58.

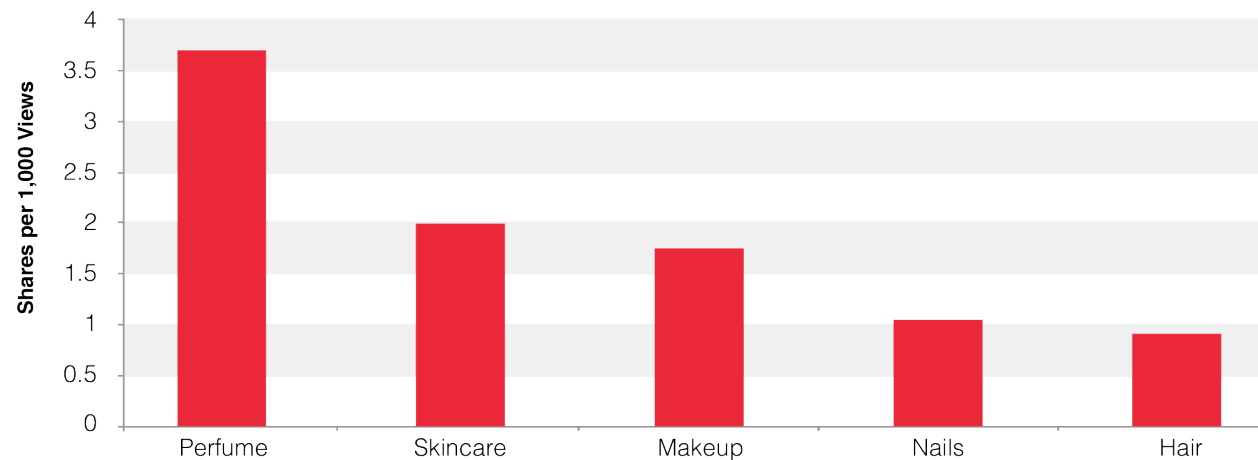
The most common beauty creator video types within YouTube's perfume space are brand-sponsored giveaway videos promoting new fragrances, and perfume review videos.

Perfume Content on YouTube Attracts More Average Views per Video and More Average Shares per View Than Any Other Category of Beauty Content

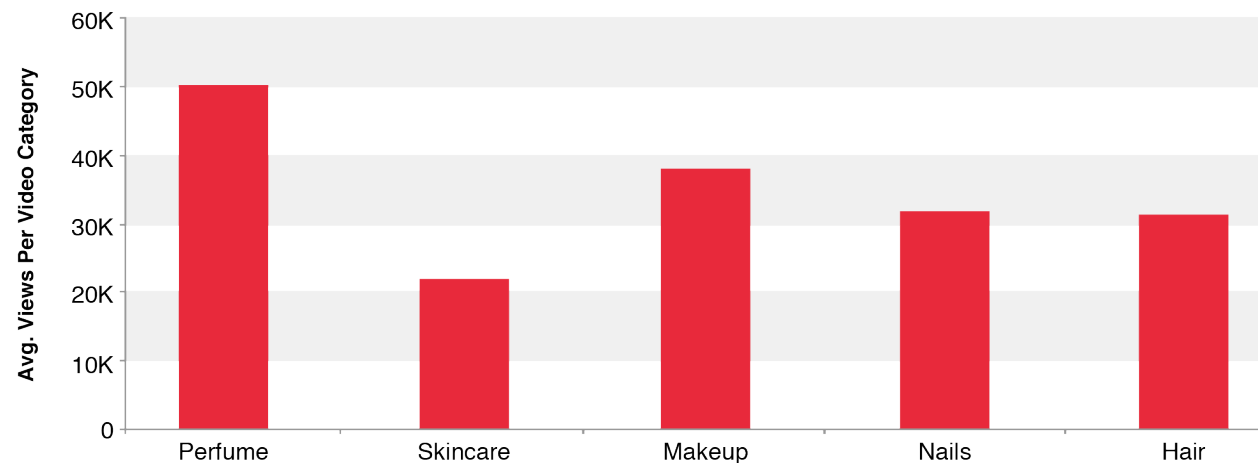
Perfume videos on YouTube account for **12%** of YouTube's top beauty videos but attract **150% more audience engagements per view and significantly more shares per 1,000 views than any other variety of beauty video** on YouTube. (Figure 59)

Perfume videos earn the highest number of average views per video of all YouTube beauty categories—**50,000 average views per video**, compared with fewer than 25,000 average views per video for skincare videos and just under 40,000 views per video for makeup videos. (Figure 60)

Shares Per 1,000 Views: YouTube Beauty Categories



Average Views Per Video: YouTube Beauty Categories



66

99.6% of YouTube's top perfume-related views are of brand videos. Perfume videos attract 150% more audience engagement per view than any other type of beauty video.

99

Figure 59. Per 1,000 views, perfume videos are shared more frequently than any other category of beauty video.

Figure 60. Perfume videos on YouTube attract an average of 50,000 views per video; significantly more than any other category of YouTube beauty content.

Top 25 YouTube Beauty Videos of All Time

by Audience Engagements (Likes, Dislikes, Shares, Comments, and Tweets)

Rank	YouTube Channel	Video Title	Engagements
1	Schwarzkopf	You - A Declaration of Love by Schwarzkopf Nectra Color	420,727
2	macbarbie07	Morning Routine: Summer 2014!	404,489
3	diamondsandheels14	Acne Foundation Routine for Cystic, Scaring, Oil and Blackheads Cassandra Bankson	387,349
4	CHANEL	There you are - CHANEL N°5 Part 1	381,313
5	MichellePhan	Lady Gaga Bad Romance Look	324,314
6	macbarbie07	Running Late For School Quick Hair fixes, Makeup, & Outfit Ideas!	287,800
7	zoella280390	How To: My Quick and Easy Hairstyles Zoella	273,451
8	macbarbie07	Easy ways to spice up your room! + DIY Decorations	268,033
9	CHANEL	Marilyn and N°5 (30 version) - Inside CHANEL	257,756
10	CHANEL	COCO MADEMOISELLE: She's not there - CHANEL	243,867
11	macbarbie07	Morning Routine: Fall Edition!!	241,073
12	LuxyHair	Running Late Hairstyles	211,353
13	itsthefa	Anime Eyes with MAC	200,287
14	dope2111	Me as Angelina Jolie !!!A Make-up Transformation !!!!!	177,368
15	MichellePhan	Lady GaGa Poker Face Tutorial	164,027
16	naturallybellexo	9 Different Eyeliner Looks	152,493
17	Jaclynhill1	Smokey Cat Eye	134,311
18	kandeejohnson	Barbie Doll MakeUp Transformation	128,962
19	bebexo	Hair Bow Tutorial Hairstyle for Short and Long Hair	128,361
20	pursebuzz	Makeup Tutorial: How to Fake Abs	121,702
21	Dior	Miss Dior – La vie en rose: [60]	113,923
22	CuteGirlsHairstyles	Dutch Flower Braid Updos Cute Girls Hairstyles	109,771
23	MelaNiieVideos	How To Cover Acne & Scars Everyday Makeup Transformation Routine	106,891
24	simplelittlepleasues	Valentine's Day Water Marble Nail Art Tutorial	106,617
25	Pantene	Not Sorry I #ShineStrong Pantene	99,404

Figure 61.

Four of the top YouTube videos of all time according to audience engagements are perfume videos produced by CHANEL and Dior. CHANEL's "There you are — CHANEL N°5 Part 1" video ranks fourth with 381,313 total audience engagements as of April 2015. Brand-produced videos are indicated in bold.

Report Methodology

Data Collection

Pixability used its patent-pending YouTube ad buying and video marketing software to extract metrics on each beauty creator's and beauty brand's YouTube channel, videos, audiences, and social networks. Pixability's software automatically collected a list of hundreds of candidate channels using loose beauty-related filtering criteria.

The list was reduced to **215 beauty brands** and **182,621 beauty creators** who produce and publish YouTube videos falling within the makeup, skincare, hair care, nails, and perfume categories.

Data on social behavior and view metrics from **1,783,935 YouTube beauty videos** was harvested using Pixability's software.

Metrics analyzed include:

- Number of videos per channel
- Number of views
- Number of channel subscribers
- Number of views, comments, Likes, and Dislikes per video
- Metadata metrics for each video, such as number of tags and description lengths, publishing date, and video length
- Number of times each YouTube video was shared on Facebook and Twitter. The public APIs of the two services were queried with the exact YouTube video URLs to gain this information.

The data represented in *Beauty on YouTube 2015* includes full and exact counts of the metrics described above. No sampling, estimates, regressions, or projections were used.

Inclusion Criteria

- Only beauty brands with a predominantly English-language YouTube presence were included in Pixability's data scan. Brands that had an online presence exclusively or primarily in a language other than English were excluded from this study. UK channels in English were included.
- To ensure authenticity of the YouTube channels included, only official YouTube channels owned by brands and verified beauty creators were analyzed.

Conclusion

Pixability's 2015 *Beauty on YouTube* study is a comprehensive examination via Pixability's YouTube marketing and analysis software of the YouTube beauty ecosystem today and the online video behavior of **215 beauty brands** and **182,621 beauty creators**.

The aim of Pixability's latest study is to educate and equip beauty brand marketers and their agencies with the insights needed to **attract and engage** a YouTube audience; **build and grow** a loyal channel subscriber base; **expand brand awareness** to increase share of voice; and ultimately **convert** YouTube beauty viewers into brand customers.

Beauty on YouTube continues to grow in size, scope, and audience diversity

- The beauty ecosystem experienced a dramatic **50% growth rate in views** from January 2014—April 2015 due to an influx of new content, the growing popularity of beauty creator personalities, and the rise of mobile-first YouTube viewing.
- With **55%** of YouTube beauty views now coming from **mobile devices**, beauty brands must adapt their content strategies and publishing patterns to keep pace with changing consumer behavior.

Up-and-coming beauty creators are overthrowing YouTube's original beauty queens in an increasingly competitive fight for subscribers and sponsors

- **YouTube stars** are now judged to be more extraordinary and relatable than traditional celebrities.
- Partnering with lesser-known, **up-and-coming beauty creators** is an effective and economical strategy for beauty brands as the next generation of beauty creators closes in on YouTube's original A-List.

Beauty brands can boost lackluster YouTube performance through paid media spend and strategic beauty brand/creator partnerships

- The strongest beauty brand channels on YouTube contain a **diverse mix** of ads created specifically for YouTube, tutorials, brand-sponsored creator content, giveaway videos, and other exclusive content.
- Beauty brands playing catch-up to beauty creators should **increase their paid YouTube media spend** to accelerate monthly views of YouTube content.
- Smart beauty brands are paying attention to the increasingly mainstream star power of YouTube's independent beauty creators and are forming **mutually beneficial partnerships**, ranging from brand-sponsored creator giveaways to brand-owned creator-curated channels.

Emerging content niches may hold the key to critical future growth for beauty brands

- Beauty brands should take note of two new high-growth audience and content segments on YouTube—**mature beauty** and **male grooming**—and create relevant content that fills the current gap between user demand and content supply.
- Additional **underserved beauty segments** on YouTube include hair, eye makeup, body makeup, mature beauty content, men's grooming content, and cross-over content such as Beauty + Fashion.

About Pixability

Pixability's ad buying and video marketing platform helps the world's leading brands and their agencies achieve maximum impact with video.

Pixability's software is divided into three simple sections that make it easy for brands to target the right audience on YouTube, plan and execute ad campaigns, and optimize placements in real-time.

To Contact Pixability:

- Visit www.pixability.com
- Call **888-PIX-VIDEO** (888-749-8433)
- Email marketing@pixability.com

1. Insights

Identify Placements & Keywords

Video Radar

Identify the best performing YouTube channels from thousands of options.

Creator Scorecards

Score channels and influencers based on specific campaign goals.

Explore Industry Trends

Trending Analysis

Compare branded channels, videos, views, and engagement within a single dynamic chart.

Insights in Real-Time

Access industry-wide publishing patterns.

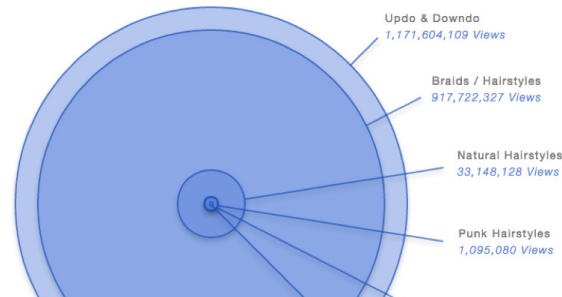
Understand the Competitive Environment

Grader

Benchmark brands against competitors and quickly conduct best practices gap analyses.

Share of Voice

Compare brands' share of voice on YouTube versus competitors and content creators.



2. Channel Management

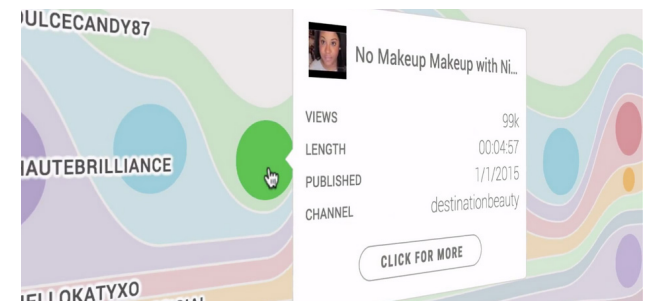
Content Management & Channel Optimization

Channel Engineering

Modify channels and playlists; edit metadata, titles, shortlinks, and more.

Social Media Promotion

Share videos on Facebook, Twitter, and LinkedIn.



3. Campaign Management

Ad Campaign Creation

Create new campaigns with pre-configured workflows.

Campaign Benchmarking

Benchmark against relevant industries with Pixability Ad Performance Scores.

Campaign Reporting

Key Metrics Dashboard

Stay up-to-date on performance with KPI dashboards.

Key Metrics Comparison Charts

Compare metrics with customizable drill-down charts.

Beauty Brands Included In This Study

Ranked by Total Number of Channel Subscribers

Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
1	Victoria's Secret*	VICTORIASSECRET	656,260	389,223
2	I Love Makeup	ilovemakeupOFFICIAL	426,625	127,291
3	CHANEL*	CHANEL	407,674	175,159
4	Sephora	Sephora	314,737	164,710
5	em michelle phan	emmichellephan	276,324	201,678
6	MAC Cosmetics	maccosmetics	211,566	138,545
7	Dior*	Dior	194,279	93,122
8	Real Techniques	realtechniques	175,174	101,789
9	Burberry*	burberry	166,003	89,480
10	KatVonD*	thekatvond	132,924	69,731
11	CoverGirl	COVERGIRL	107,544	18,441
12	Destination Beauty	destinationbeauty	102,290	36,878
13	Dolce & Gabbana*	dolcegabbanchannel	97,898	43,836
14	Lush Cosmetics	Lushcosmetics	85,886	41,224
15	e.l.f. Cosmetics	eyeslipsfacedotcom	79,460	56,609
16	Benefit Cosmetics	benefitcosmetics	75,318	43,106
17	Maybelline New York	maybellinenewyork	74,689	45,078
18	BH Cosmetics	BHCosmetics	71,489	52,614
19	Dove	doveunitedstates	66,591	29,583
20	Mary Kay	marykay	62,602	37,292
21	Birchbox	birchboxtv	56,750	33,250
22	Bobbi Brown	bobbibrown	53,568	29,294
23	NYX	nyxcosmetics	47,001	28,359
24	Smashbox Cosmetics	SmashboxCosmetics	41,700	11,598
25	Urban Decay	/user/UrbanDecayYT	41,069	18,742
26	Forever 21*	/user/Forever21Inc	40,539	25,641
27	PINK*	PINK	37,262	28,602

Beauty Brands Included in this Study

Ranked by Total Number of Channel Subscribers

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Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
28	Too Faced Cosmetics	toofacedcosmetics	35,335	6,533
29	Gucci*	gucciofficial	34,600	13,257
30	Carol's Daughter	CDTVonline	33,948	17,738
31	Lancôme	LancomeStudio	33,650	18,790
32	L'Oréal Paris	lorealparisnyc	32,379	13,074
33	Dermablend Pro	dermablendpro	32,215	5,896
34	OPI	opiproducts	28,177	15,262
35	Kérastase	kerastaseUSA	27,674	1,744
36	HUGO BOSS*	hugobosstv	26,686	12,875
37	Pantene	pantene	25,691	5,175
38	Clinique	clinique	25,647	10,887
39	tarte cosmetics	tartecosmetics	25,612	12,117
40	Clean and Clear	cleanandclearus	24,552	1,281
41	bare Minerals	bareescentuals	24,036	9,358
42	NARS	narsmedia	23,960	11,831
43	AVON	AvonProductsInc	23,664	13,149
44	Garnier	GarnierUSA	23,210	6,799
45	Aveda	aveda	22,754	10,973
46	Ralph Lauren*	RLTVralphlauren	21,670	10,619
47	neve cosmetics	NeveCosmetics	21,257	17,120
48	illamasqua	illamasqua	21,032	16,027
49	Yves Saint Laurent Beauty	yslparfums	21,012	18,930
50	Proactiv	Proactiv	20,733	11,144
51	TRESemmé	tresemme	20,293	9,489
52	Diesel*	DieselPlanet	19,433	12,357
55	essence cosmetics	essencecosmetics	18,666	9,272
54	Revlon	revlon	18,549	8,777

Beauty Brands Included In This Study

Ranked by Total Number of Channel Subscribers

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Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
55	Estée Lauder	esteelauder	16,846	8,255
56	Schwarzkopf	schwarzkopf	16,838	2,739
57	Olay	olay	16,047	1,463
58	LORAC Cosmetics	LORACCosmetics	15,238	3,466
59	GIORGIO ARMANI Beauty	GiorgioArmaniBeauty	14,521	5,453
60	ghd	ghd	14,521	9,196
61	Napoleon Perdis	napoleonperdis	12,484	4,345
62	Sally Hansen	SallyHansenTV	10,282	4,923
63	essie	essieUSA	10,262	624
64	The Body Shop	thebodyshop	10,172	4,813
65	diego dalla palma	diegodallapalma	9,956	4,825
66	Conair	convideo123	9,930	4,469
67	Redken (consumer)	redken	9,531	5,535
68	Rodial	RodialSkincare	9,523	213
69	IMAN Cosmetics	imancosmetics	9,499	7,694
70	MAKE UP FOR EVER	MakeUPForEverUSA	9,304	3,473
71	Instyler Hair	instylerhair	9,255	6,269
72	Oriflame Cosmetics	oriflamecosmetics	8,997	4,567
73	Paul Mitchell	PaulMitchellChannel	8,975	6,290
74	TOM FORD*	TOMFORDINTERNATIONAL	8,938	3,871
75	mark.	MarkGirlTV	8,928	8,071
76	L'Oréal Professionnel	lorealprofessionnel	8,913	3,438
77	Moroccanoil	moroccanoil	8,597	2,305
78	Clarins	user/Clarins/custom	8,576	6,930
79	Bumble and bumble.	TheHouseOfBumble	8,537	5,958
80	Josie Maran Cosmetics	josiemarancosmetics	8,054	6,267
81	Matrix	imagineallyoucanbe	7,716	1,766

Beauty Brands Included in this Study

Ranked by Total Number of Channel Subscribers

Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
82	eos	Eosproducts	7,707	2,501
83	DKNY Fragrances*	dkny	7,554	3,727
84	Max Factor UK	MaxfactorUK	7,017	4,752
85	Maison Margiela*	MARGIELAtube	6,553	3,569
86	Shiseido	shiseidousa	6,553	4,766
87	Head & Shoulders	headandshoulders	6,501	2,524
88	Clairol Professional	ClairolProfessional	6,472	4,557
89	SoftSheen-Carson	softsheencarson	6,326	2,869
90	Simple Skincare	simpleskincare	6,278	3,098
91	Stila	stilavideo	5,723	4,433
92	Sonia Kashuk	SoniaKashukInc	5,378	3,320
93	Neutrogena	NeutrogenaVideos	5,089	749
94	theBalm Cosmetics	theBalmCosmetics	4,928	2,797
95	Julep Maven	julepmaven	4,703	3,106
96	Clarisonic	Clarisonic	4,618	1,397
97	DermStore	DermStore	4,510	2,024
98	Soap & Glory	OfficialSoapandGlory	4,423	2,799
99	Clairol	Clairol	4,418	922
100	Vidal Sassoon	vsproseries	4,350	777
101	jane iredale	janeiredale	4,221	2,571
102	Herbal Essences	herbalessences	4,175	2,097
103	aveeno	aveeno	3,856	365
104	Laura Mercier	LauraMercierCosmetic	3,824	2,197
105	Ouidad	OuidadTheCurlExperts	3,785	2,918
106	pmd	pmd	3,762	2,985
107	Baxter of California	BaxterOfCA	3,679	308
108	Kiehl's	KiehlsNYC	3,650	1,031

Beauty Brands Included In This Study

Ranked by Total Number of Channel Subscribers

Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
109	L'OCCITANE en Provence	loccitaneenprovence	3,635	1,411
110	Almay	almay	3,558	1,926
111	IT Cosmetics	itcosmetics	3,463	2,067
112	John Frieda	JohnFriedaUS	3,268	2,141
113	Burt's Bees	burtsbeesvideos	3,090	1,381
114	Cover FX	coverfx	3,039	1,977
115	drybar	drybarblowdrybar	3,034	1,893
116	Perricone MD	DrPerricone	2,958	2,116
117	wen	WenHairCare	2,770	1,350
118	bioelements	bioelements	2,760	2,307
119	Pixi by Petra	PixiBeauty	2,720	1,321
120	Physicians Formula	pfcosmetics	2,476	781
121	TEMPTU	TEMPTUmakeup	2,436	1,296
122	Elizabeth Arden	ElizabethArdenBeauty	2,426	1,097
123	Luminess Air	LuminessAir	2,397	1,192
124	The Art of Shaving	theartofshaving	2,389	1,234
125	SK-II	skiiofficial	2,331	1,899
126	MIZANI	MIZANIUSA	2,161	896
127	philosophy	philosophybeauty	2,119	646
128	Rimmel London	RimmelLondonUS	2,100	1,172
129	Living Proof	livingproof	2,007	658
130	INGLOT	INGLOTcosmeticsUSA	1,873	648
131	Milani	Milani	1,831	781
132	T3	T3micro	1,702	547
133	Caudalie	Caudalie	1,511	595
134	MURAD	muradskincare	1,488	528
135	Laura Geller Beauty	LauraGellerUS	1,465	1,205

Beauty Brands Included in this Study

Ranked by Total Number of Channel Subscribers

Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
136	Pür Minerals	PurMineralsVideo	1,422	1,026
137	Fekkai	Fekkai	1,288	711
138	Hair Club	hairclub	1,273	1,069
139	Origins	origins	1,271	660
140	Tweezerman	TweezermanNY	1,269	315
141	Viktor&Rolf	ViktorRolfTV	1,217	616
142	NIVEA	NIVEASkincare	1,177	803
143	NuFace	MYNuFACE	1,140	669
144	amika	amikanyc	1,135	970
145	Juice Beauty	juicebeauty	1,121	700
146	Pureology	PureologySCC	1,039	531
147	Hourglass Cosmetics	HourglassCosmetics	1,032	962
148	Clearasil	clearasil	985	315
149	Youngblood Mineral Cosmetics	ybcosmetics	970	930
150	SkinCeuticals	user/skinceuticals	968	424
151	Ardell	Ardelllashes	931	720
152	Sultra	SultraBeauty	928	779
153	Helena Rubinstein	HRcosmetics	915	494
154	Biotherm	biotherm	887	364
155	tria Beauty	triabeauty	875	730
156	SHU UEMURA ART OF HAIR	SHUUEMURAARTOFHAIR	796	492
157	Penhaligon's	PenhaligonsLtd	769	620
158	NEXXUS	nexus	762	301
159	Jack Black	JackBlackSkinCare	756	93
160	La Roche-Posay	LaRochePosayUSA	747	337
161	Kate Somerville	katesomervilleskin	741	601
162	Nails inc	nailsincLondon	739	689

Beauty Brands Included In This Study

Ranked by Total Number of Channel Subscribers

Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
163	Keranique	KeraniqueHair	686	476
164	Eucerin	EucerinUS	685	468
165	La Mer	lamer	669	83
166	KORRES	korresofficial	655	567
167	NYC	nycnewyorkcolor	654	481
168	LAB SERIES	labseries	637	378
169	TACHA	TATCHAbeauty	633	541
170	REN Skincare	RENSkincare	593	267
171	butter LONDON	butterLONDONofficial	584	459
172	Ojon	OjonHaircare	579	389
173	Yes To Carrots	yestoinc	547	378
174	ALTERNA Haircare	alternahaircare	542	451
175	Ole Henriksen	olehenriksenvideo	535	427
176	RoC Skincare	RoCSkincare	516	95
177	Dr. Brandt	drbrandtskincare	450	349
178	Sebastian Professional	OfficialSebastianPro	443	70
179	GLAMGLOW	glamglowmud	439	395
180	Vaseline	VaselineUS	437	183
181	fresh	FreshBeautyChannel	421	35
182	StriVectin	strivectin	419	86
183	Jouer Cosmetics	JouerCosmetics	398	196
184	ModelCo	ModelCoofficial	372	263
185	la prairie	LaPrairieBeauty	359	84
186	Rogaine	rogaine	358	74
187	INOA	inoaUSA	338	210
188	Pond's	Ponds	300	98
189	Boots	bootsbeautyusa	286	107

Beauty Brands Included in this Study

Ranked by Total Number of Channel Subscribers

Brands with mixed product lines including fashion products, handbags, etc. are marked with an *.

Rank	Beauty Brand	YouTube Channel	Subscribers as of April 2015	Subscribers as of December 2013
190	Trish McEvoy	trishmcevoycosmetics	285	72
191	boscia	bosciaskincare	284	135
192	AMOREPACIFIC	AMOREPACIFICUS	245	193
193	AHAVA	ahavanorthamerica	240	60
194	Dr. Dennis Gross Skincare	DGskincare	225	107
195	Molton Brown	MoltonBrownUK	223	50
196	Vichy	VichyLaboratoriesUSA	215	133
197	Edward Bess	edwardbess	193	156
198	DERMAdoctor	DERMAdoctor	166	134
199	per-fékt	perfektbeautyinc	164	124
200	LIERAC	LieracSkincare	160	121
201	Japonesque	japonesque09	159	80
202	NUDE Skincare	nudeskincarefilm	137	54
203	Coty	COTYvideos	135	78
204	Tanda	tanda	134	99
205	Prescriptives	PrescriptivesOnline	111	86
206	Alba Botanica	channel/UCN7xdS1w07KWkuohrjjEYhg	91	46
207	HairUWear	HAIRuWEAR	68	37
208	Majic Beauty	MajicBeautyOfficial	39	14
209	Kose	channel/UCSeLjHSP00Yu-aXYJ0nSLqg	31	20
210	Perfect Formula	PerfectFormulas	21	16
211	Kiss My Face	KissMyFaceVideos	13	3
212	Bioré	channel/UC4_KRggmX_xuZv8HqCohnHQ	10	7
213	Deborah Lippmann	DeborahLippmann	0	0
214	H2O+	h2oplususa	0	0
215	R+Co	rogueandco	0	0

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www.pixability.com

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