

RESEARCH

## Beauty bloggers more impactful than experts for industry's continued growth: report

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By JEN KING

The value of the global beauty market is expected to reach \$675 billion by 2020 with revenues concentrated in Asia, Europe and the United States, according to a new report by Fashionbi.

Fashionbi's "[Top 15 Best Beauty Bloggers to Watch: Makeup & Beauty Vloggers – Evolution, Strategy, Influence and Success Factors](#)" report examines the current state of the personal care market and how beauty video bloggers and makeup professionals have helped brands to embrace the digital potential of beauty marketing. For luxury brands who count professional makeup artists as creative partners, pairing with a well-known beauty vlogger may yield better results, as the Internet celebrity may be more relatable than the artist behind the products.

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"Luxury brands are still reluctant to use the beauty bloggers as the faces of their campaigns," said Ambika Zutshi, CEO of [Fashionbi](#), Milan. "However, given the power of these bloggers, they are really missing a big opportunity. These bloggers have highly expanded presence, daily activeness, daily growth in followers and positive appeal that brands only stand to gain from a collaboration.

"Today, vloggers are reaching millions of followers and views compared to the professional makeup artists and beauty brands themselves," she said. "The top-of-the list beauty bloggers are present on all the most important channels, have an audience reach of 26 million on average and speak in the local language of their audience.

"On the other hand, the professional makeup artists are not even present on all channels, do not interact one-on-one with their fans given their status, are mostly from English-speaking countries and could be quite intimidating for the young digital customer-base. This sets a hurdle between a brand, its spokesperson and its influence on the final purchaser."

For the report, Fashionbi looked at beauty spending across the globe and which countries drive the most growth for the sector. Also, Fashionbi compared the top 15 beauty vloggers and the industry's top professional makeup artists to grade impact. Consideration was based on audience reach on YouTube, Instagram, Facebook, Twitter and Google+.

It's a beautiful world

The average woman spends two years of her life applying makeup, and on a day-to-day basis spends about 55 minutes on her appearance. Fashionbi also found that, on average, women own eight times more makeup than they actually use.

Understanding products of interest and the number of items purchased per year and at what cost can help beauty marketers pinpoint strategies in various markets to create a hyper localized approach to selling.

The allocation of personal care products and overall spending differs by country. For instance, women in the U.S. use 12 products daily, but only buy a single item at a time while Asian women use 18 products daily and buy three to five items at a time.

Likewise, the average British woman in her lifetime will spend nearly \$139,000, or \$2,786 per year, on cosmetics, while women in Australia spend an average of \$3,603 annually at spas and on personal care.



*Burberry video still, beauty spring/summer 2014*

Skincare tends to require the most products, with Chinese and Brazilian women using 7 or more items in their daily skin routine compared to eight to 10 products in South Korea. In terms of skincare, 80 percent of global revenue is expected to stem from the Asian market by 2019.

As such, the most promising markets for sector growth are China, India and Indonesia, as well as Brazil. Overall, Europe holds 15.8 percent of the global market, followed by the U.S. at 15.2 percent and Japan at 10.9 percent.

"The beauty market value is predicted at US \$675 billion by 2020, with revenues to be concentrated mainly around Asia, Europe and the U.S.," Ms. Zutshi said. "That makes Asia one of the most important markets. Asians remain one of the most fascinated regions for beauty.

"[Asian consumers] not only favor Western products but many Asian-made products, especially those from South Korea," she said. "The need of the hour is to bag a vlogger or even a few, either Asian or of Asian origin, to appeal to the audience.



*Estee Lauder's South Korean ecommerce Web site*

"Country-specific campaigns in local languages explaining the quality of the product and tutorials made by the vloggers of different skin-types can create a big buzz. Of course social media, of the brand as well as of the bloggers, should be highly involved to spread the word. And this can be continued on a monthly basis."

#### The girls next door

While beauty bloggers hail from mostly English-speaking countries, their audience reach is vast and not limited to their home country. Starting as a hobby for most, many beauty bloggers began recording videos concentrating on the latest beauty products and trends, but have expanded topics to include skincare, hairstyle, fashion and lifestyle touchpoints.

The winning combination of the top five beauty vloggers considered by Fashionbi mix topics to appeal to a larger audience by offering tips and advice. With a total audience of 35.5 million consumers, Mexico's Yuya, who started her beauty vlog in 2009, rank as the top influencer in the market.

Yuya is followed by Zoella, from the United Kingdom, who has 24.3 million combined followers. The final three vloggers of the top five are all from the U.S.: Bethany Mota, Michelle Phan and Carli Bybel. Ms. Mota has 20.1 million followers while Ms. Phan has a community of 15.8 million and Ms. Bybel counts 9.7 million consumers as fans.

Due to their immense followings, these young women have also started brands of their own, working with larger beauty labels to create perfumes, cosmetics and clothing as well as being cast as spokesmodels for beauty marketers and retailers. Ms. Phan is likely the best the example of the successful path of beauty vloggers with her co-creation of the beauty subscription service Ipsy, which sends sample-sized items to members on a monthly basis.



*Michelle Phan for Lancome, 2012*

In comparison, professional makeup artists that work, contractually or on a freelance basis, with leading beauty brands do not have the same large scale following.

For example, Francois Nars, who started his namesake company out of Barneys New York's beauty department after a behind-the-scenes career with the likes of Marc Jacobs, only has a total following of 4.8 million. Similarly, Bobbi Brown, possibly the best-known makeup artist turned brand, only has 3.6 million followers.

Also in the top five are Lisa Eldridge, who has worked with Shiseido and Chanel and currently serves Lancme as the brand's global creative director of makeup ([see story](#)), has 3.2 million followers across the social channels considered. Charlotte Tilbury and Pat McGrath boast a much lower following despite their popularity, with 1.7 million and 1.2 million followers, respectively.

As with beauty bloggers, professional makeup artists have turned their skills into branded businesses by creating their own product offerings and how-to books.

Most recently, Ms. McGrath, who counts Gucci, Prada and Dolce & Gabbana as clients, entered the cosmetics realm not with a luxury brand partner, but as a standalone beauty label. The first release of Pat McGrath Labs was a multi-use gold pigment called Gold001, limited to 1,000 units, which sold out within minutes of launch ([see story](#)).



*Pat McGrath Labs' Gold 001 packaging*

Although the professionals behind editorial images and runway beauty trends set the stage for the beauty bloggers, consumers are more likely to turn to the latter group. This is because the women behind the vlogs are less intimidating and are more relatable working on their own "imperfect faces" rather than a "static [model] with the perfect appearance."

For instance, French beauty brand Guerlain partnered with seven influencers to show its cosmetic offerings to consumers in a more personalized and relatable fashion.

For the partnerships, Guerlain worked with Style Coalition, a network that connects brands with influencers and bloggers to create branded content, to select Internet personalities that represent different ages, ethnicities and skin tones. By partnering with a series of women rather than just one, Guerlain is able to give a better representation of its consumers and appeal to the wider audience at hand ([see story](#)).



*Felicia Walker Benson's Guerlain look, as seen on ThisThatBeauty*

"[Luxury brands should] be open to explore and experiment with this fast pacing phenomena of beauty blogging in the digital marketing space," Ms. Zutshi said. "Today's customer is more practical and knowledge-hungry. She analyses, explores and researches before investing money into a product.

"All those who can satisfy these customer demands first with the most innovative 'food for thought' strategies and with a more relatable down-to-earth personality will win," she said.

"The potential is such that even the big name celebrities are putting their name on the beauty lines and being fully involved in all the development, manufacturing and packaging processes to ensure they deliver high quality at the most affordable prices. Many makeup brands, such as Benefit Cosmetics, Too Faced and Makeup Forever, are already using vloggers' power to involve them in their social campaigns and gaining immensely out of it.

"For instance, it has been proven that when the beauty influencer Zoella recommends a Topshop blusher, there is a 40 percent click-through rate to the brand's site. Exactly the same loop can be developed for a luxury label - why not? These bloggers have a very likeable, bubbly and social personalities. The brands just need to choose the best one going with its image and use this opportunity at its best."

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