



FEBRUARY 2019

The State of French Beauty Influence, a study by CEW France and Wearisma

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Introduction

Wearisma and CEW France have partnered to produce the first in-depth study on the state of French Beauty Influencer Marketing.

Our joint research will walk you through unique insights into the world of beauty Influencers, successful brand strategies and products and not-to-be-missed Influencer profiles to watch out for in 2019.

We aim to set the benchmark for the evolution of French Beauty Influence and identify the key metrics that define success for leading beauty brands in Influencer Marketing.

Executive Summary

We've become familiar with seeing the same traditional heritage and prestige brands at the top of the French beauty charts. Benchmark sales figures and industry reports rightly highlight the breadth and reach of these brands within the traditional mass market.

The conversations online amongst influencers, however, look quite different.

Our analysis delves deep into real-time data in order to reveal the current beauty-based conversations happening among France's influencers. For instance, which brands they are tagging, which products they are talking about, their engagement rates and what media value they are generating. This serves as a good indicator of the digital buzz that brands generate within the beauty sector and how well they are marketing themselves online.

Through their content, Influencers are challenging traditional concepts of French beauty, which are evolving to become increasingly diverse, increasingly adventurous and increasingly male. When engaging in Influencer Marketing, brands need to reflect the changing face of beauty in order to fully engage French online audiences.

This report reveals the value of a data-driven approach to Influencer Marketing, so that French beauty brands can flourish online. We unveil fresh insights into the following areas:

- How Influencer Marketing is supporting **innovation**, both in terms of facilitating the transition of Indie Brands into Digital Giants, as well as fostering innovation of new bold looks.
- The most mentioned Beauty '**Power Player**' brands by French Influencers - we take a closer look at why, and who is following close behind.
- The success of '**Digital Giants**' like Huda Beauty, Anastasia Beverly Hills and NYX Cosmetics to understand how they have dominated the online marketplace through successful Influencer strategies.
- We also put the Influencer strategies of the smaller Independent, or '**Indie Brands**' under the spotlight - their methods, who they are using, and why?
- Why increasing diversity by using Beauty Boys and Men, Specialised MUA's, Influencers of Colour and Avant-Garde Artists will bring success in 2019.
- Which **specific products** are gaining traction with Influencers and therefore, what brands should be highlighting as part of their Influencer Marketing strategy?





Global Beauty: HOW THE BEAUTY MARKET IS REPRESENTED BY INFLUENCERS

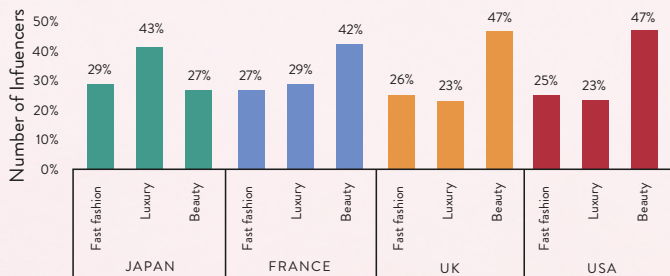


ZION MARKET RESEARCH PROJECTED THAT THE GLOBAL COSMETIC PRODUCTS MARKET WILL INCREASE BY 62% BETWEEN 2017 AND 2024.

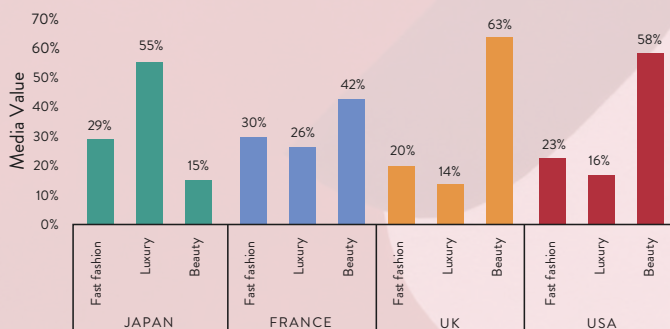
The growing value of this industry is mirrored by its impact on the digital landscape, with Beauty having the largest online share of voice in France, the UK and USA.

Our analysis also revealed that Beauty has achieved the largest media value in France, the UK and USA. The profitability of the content produced within this market is supported by the [Influencing Beauty report](#), which found that 80% of consumers agree that Influencers are pivotal in influencing their buying decisions.

SHARE OF VOICE BY NUMBER OF INFLUENCERS BY COUNTRY – Q4 2018



SHARE OF VOICE BY MEDIA VALUE BY COUNTRY – Q4 2018



Source: Wearisma Data
Country: France, Japan, US & UK
Timeline: Q4 2018



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French Beauty





A 2017 report by Statista revealed that France consumed the second largest amount (11.34 billion Euros) of cosmetics in Europe, behind Germany.

Given the size and importance of the French consumer market, along with the fact that French multinational conglomerates like LVMH, L'oréal and Estée Lauder own a large share of the world's most popular beauty brands, the global influence of French beauty is not to be doubted.

Meanwhile, looking online, France has seen a 6% growth in active social media users in the last year alone, while more than half of the population take online reviews into account before purchase. What's more, 36% of French people have discovered a new product or brand via an Influencer.

Quite clearly, the significance of digital/Influencer Marketing within the French beauty market is huge.

So what does the French Influencer Industry look like? When analysing the makeup of French Beauty Influencers we found that on average, the majority of their audiences reside in France (80%) (followed by the UK and then Canada), which appears to reflect a propensity for such Influencers to post content in the French language. While French Mega-Influencers with 1 Million plus followers have the highest media value (€131,200 on average), French Influencers with less than 20K followers achieve the highest engagement rates (4.99% on average).

Given recent developments within the beauty industry, it is no longer helpful to discuss the industry in a homogenous fashion. As it grows, Wearisma have identified three clear fractions within the Beauty industry.



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**Wearisma's
Influence Index:**
TOP INFLUENTIAL
BEAUTY BRANDS IN
FRANCE Q4 2018

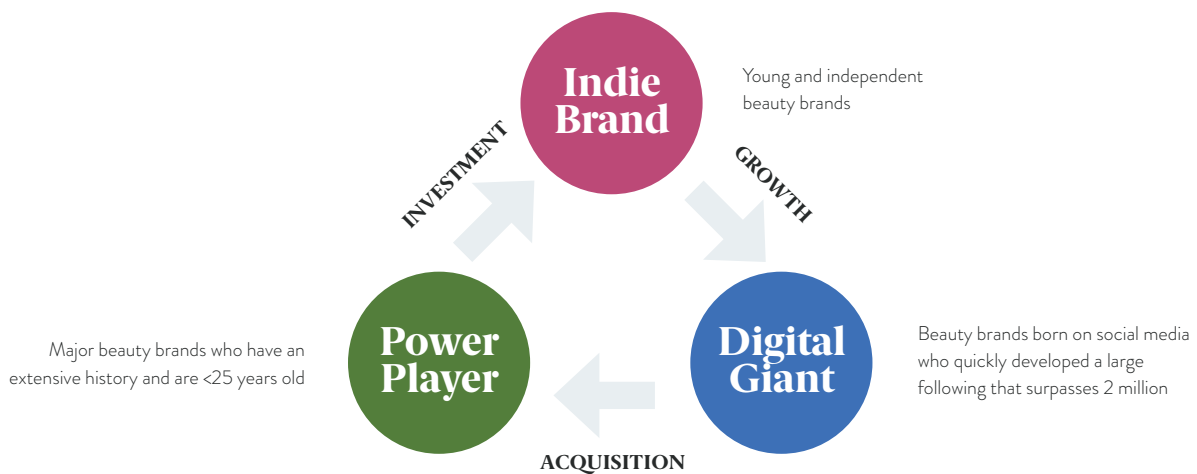


In order to obtain a clearer picture of the influence of beauty in France, we have divided the industry into three groups: ‘Power Players’, major beauty brands who have an extensive history and are more than 25 years old; ‘Digital Giants’, beauty brands born on social media who quickly developed a large following that surpasses 2 million; and ‘Indie Brands’, young and independent beauty brands.

Research from [Euromonitor](#) and [J.P. Morgan](#) indicated that between 2010 and 2015 the top 15 Power Players were steadily losing shares as Digital Giants were gaining. Perhaps in recognition of the strength of digital players, the last 5-10 years has seen half of the top ten most mentioned Digital Giants acquired by the same French multinational conglomerates who house the Power Players.

A report by [Mintel](#) has linked the success of Indie beauty brands to their ability to offer “fresh perspectives and unique benefits that big brands can’t fulfill”. During the promotion of [LVMH’s Innovation award](#) Ian Roger, Chief Digital Officer at LVMH (which owns half of the top ten Power Players and 2 of the Digital Giants) stated “If you have a startup that’s defining the future of customer experience, we want to know about you”. This statement perfectly encapsulates the cycle forming within the beauty industry, whereby brands grow, disrupt the market, become challengers, and are acquired.

The Beauty Industry Cycle



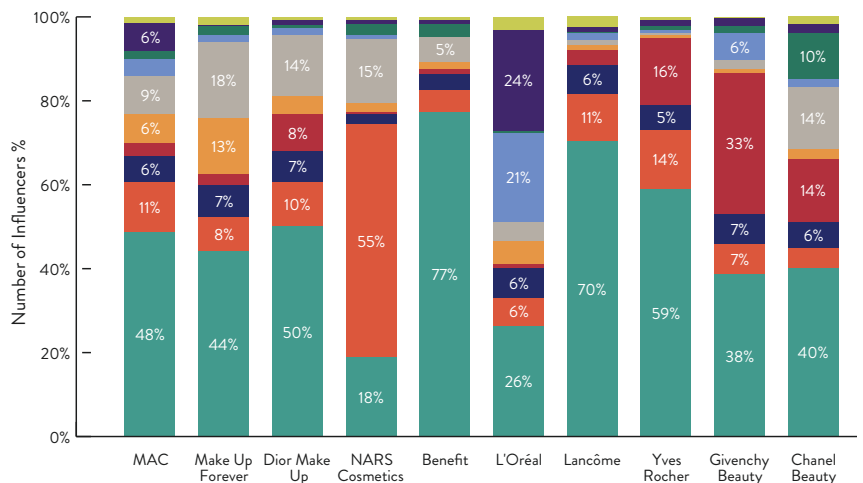


Power Players

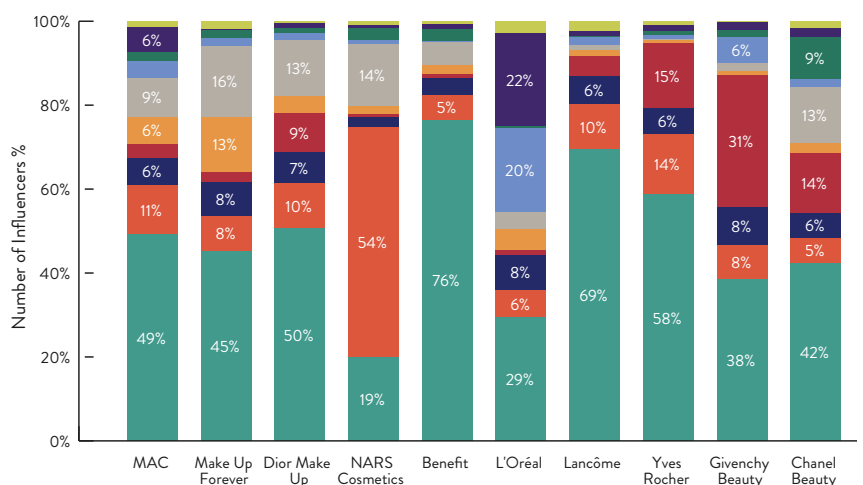
ON AVERAGE, POWER PLAYERS HAVE THE LARGEST NUMBER OF INFLUENCERS.

The majority of Power Players receive the most engagement and highest media value from French Fashion, Beauty and Lifestyle Influencers. This may be due to the natural relationship that these brands have with the fashion industry. Not only did beauty brands such as Dior, Givenchy and Chanel begin as fashion houses, Power Players like L'Oréal also sponsor Paris Fashion Week. The most mentioned brand, MAC, also has a history of having an extensive backstage presence during Fashion Month.

ENGAGEMENTS BY CONTENT CATEGORY



MEDIA VALUE BY CONTENT CATEGORY



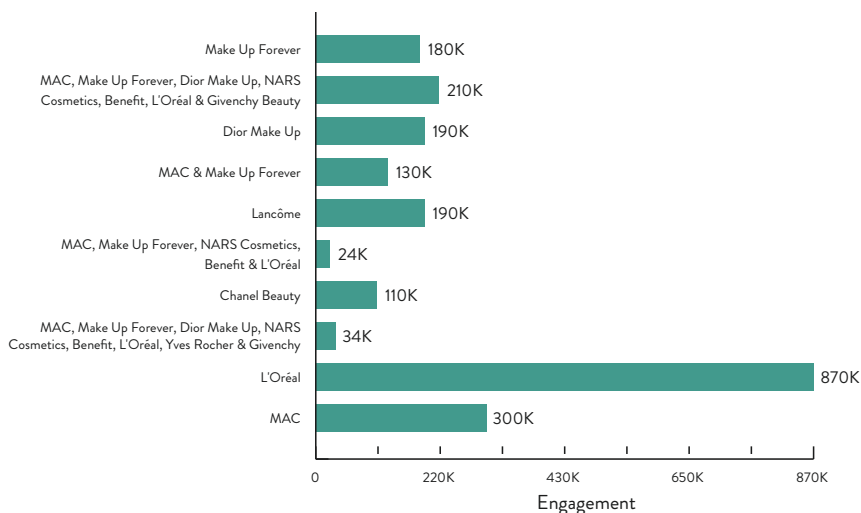
- Fashion, Beauty, Lifestyle
- Beauty, Lifestyle
- Beauty, Fashion, Lifestyle
- Fashion, Lifestyle
- Beauty, Culture, Lifestyle
- Beauty
- Beauty, Culture, Fashion
- Lifestyle
- Culture, Fashion, Lifestyle
- Culture, Lifestyle

Source: Wearisma Data
 Country: France
 Timeline: Q4 2018



L'Oréal, MAC, Chanel Beauty, Lancôme and Dior receive higher levels of engagement when mentioned alone than when mentioned in combination with other Power Players.

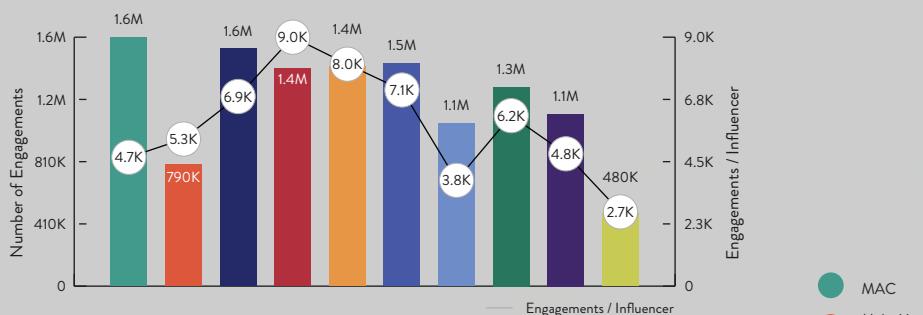
ENGAGEMENTS BY BRAND COMBINATION



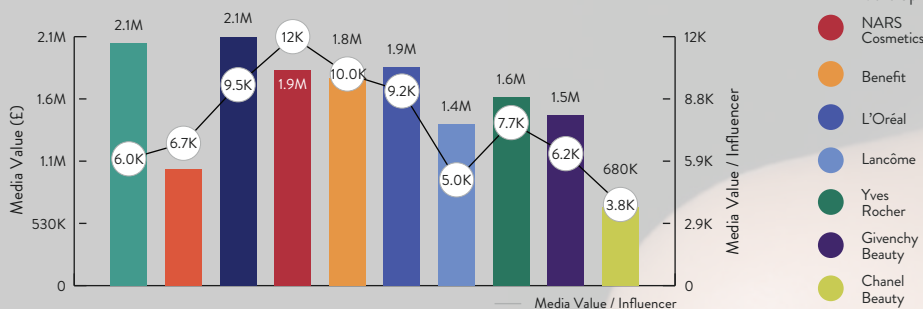
Source: Wearisma Data
Country: France
Timeline: Q4 2018

When analysing the follower groups of the Power Players, the majority of these are Micro-Influencers. Whilst American brand MAC has the largest share of Influencers in France, French brand NARS has the highest engagement rate (9K) and media value (12K) per Influencer. So, which Power Players are leveraging Influencer Marketing to the greatest effect and how are they doing it?

NUMBER OF ENGAGEMENTS AND ENGAGEMENTS PER INFLUENCER



TOTAL MEDIA VALUE AND MEDIA VALUE PER INFLUENCER



Source: Wearisma Data
Country: France
Timeline: Q4 2018














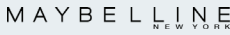
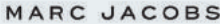









POWER PLAYERS

Top Mentioned French Beauty Brands in Q4 2019

RANK

1		MAC
2		Make Up For Ever
3		Dior Make up
4		NARS Cosmetics
5		Benefit France
6		L'Oréal Makeup
7		Lancôme
8		Yves Rocher France
9		Givenchy Beauty
10		Chanel Beauty
11		YSL Beauty
12		Clinique
13		Estée Lauder
14		Maybelline
15		Marc Beauty
16		Nocibe
17		Clarins
18		Guerlain
19		Dior Parfums
20		NUXE

Source: Wearisma Data
Country: France
Timeline: Q4 2018



No. 1: MAC COSMETICS FRANCE

Estée Lauder Companies owned MAC is the most mentioned Power Player. Some of MAC's success can be attributed to the fact that they have the highest amount of Micro-Influencers in the <20K and 20-80K follower groups. These groups have a high concentration of MAC's own employees. For instance, MAC's own avant garde Makeup Artists (MUAs) [Marieke Thibaut \(@marieke_thibaut\)](#) and [Tom Sapin \(@tomsapin\)](#) produce the most mentions for MAC. This shows that Power Players do not always need to look beyond their own brand for effective Influencers.

Interestingly, MAC's French account (@MacCosmeticsFrance) is the second most tagged beauty account by French Influencers. Even within the brand's French account, MAC maintains their global outlook by consistently posting content from @maccosmeticsUK, @maccosmeticsItalia and @maccosmeticsES to name a few. An example of this is the new global Influencer programme launched in tandem with MAC's Maker lipstick line which will see content created from Influencers in key regions across the globe, and includes ethnic minority Influencers such as the UK's Patricia Bright (@thepatriciabright), the USA's Nyma Tang (@nymatang) and the Philippines' Mainie Mendoza (@mainedcm). Therefore, MAC's popularity among french Influencers can be attributed to this global approach which results in the creation of diverse and inclusive content that appeals to France's increasingly diverse populace.



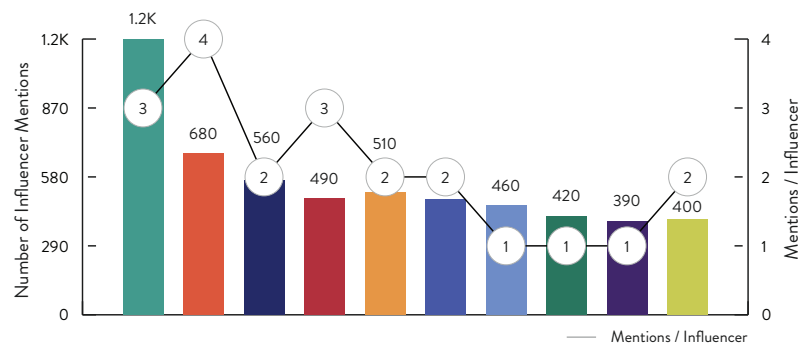
No. 2: MAKE UP FOR EVER

Coming second overall (and first for France-based brands) is Make Up For Ever. The Parisian founded and LVMH owned brand creates content that features a diverse set of Influencers including male models Marlon Samedy (@_mamomi_), Thomas Wilkinson Fullerton (@thomasjwf) and Nile Shadow (@nile_shadow). This content is resonating well with the growing interest amongst male beauty consumers in the French audience, and it is therefore no surprise that Make Up For Ever has the highest amount of mentions per Influencer.

Make Up For Ever's positioning as a 'professional' beauty brand could also factor into its success. Not only does the brand create content featuring Industry Insiders, it also enables its own followers such as Manon Cana Skovienova (@manoncana) to obtain that professional MUA status via its Parisian beauty academy (@makeupforeveracademy). Their success illustrates that French beauty enthusiasts appreciate education-focused and informative content.



NUMBER OF MENTIONS AND MENTIONS PER INFLUENCER



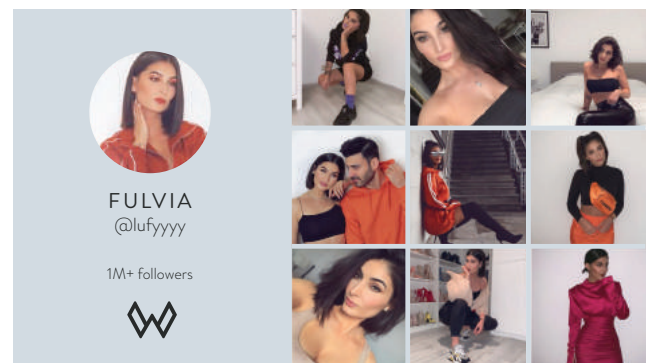
Source: Wearisma Data
Country: France
Timeline: Q4 2018

- MAC
- Make Up Forever
- Dior Make Up
- NARS Cosmetics
- Benefit
- L'Oréal
- Lancôme
- Yves Rocher
- Givenchy Beauty
- Chanel Beauty



No. 3: DIOR

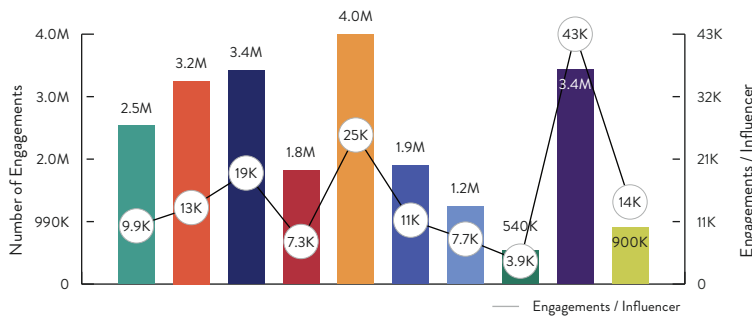
The third most mentioned Power Player is Dior. Dior ties with MAC as having the highest number of engagements (1.6Million) and media value (2.1Million). Unlike MAC, Dior achieves high engagement rates amongst Influencers like Fulvia (@lufyyyy) and Léa Coffrant (@jenesuispasjoli), rather than MUAs. Dior has the second highest number of Mega-Influencers with 1M+ followings, while three out of the top five Influencers producing the highest engagement for Dior are Mega-Influencers. Dior's social media campaigns heavily feature celebrities like Bella Hadid and Natalie Portman, and the promotion of such Mega-stars has a snowball effect of attracting the attention of Mega-Influencers with equally large followings.



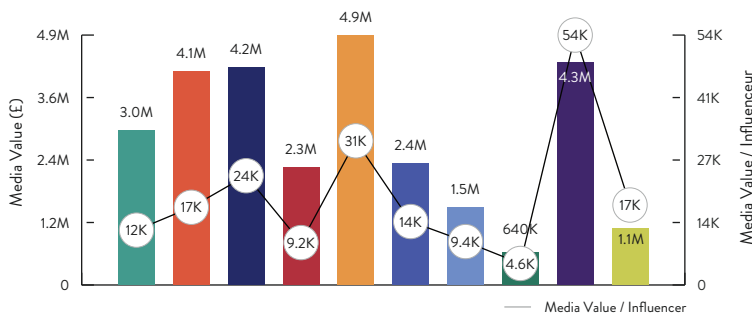
Digital Giants

DESPITE HAVING LESS INFLUENCERS ON AVERAGE, OUR ANALYSIS REVEALS THAT DIGITAL GIANTS SURPASS THE ENGAGEMENT RATES AND MEDIA VALUE ACHIEVED BY POWER PLAYERS, SUGGESTING THAT THEIR USE OF FRENCH INFLUENCERS IS THAT MUCH MORE EFFECTIVE.

NUMBER OF ENGAGEMENTS AND ENGAGEMENTS PER INFLUENCER



TOTAL MEDIA VALUE AND MEDIA VALUE PER INFLUENCER



- NYX Cosmetics
- Huda Beauty
- Beverly Hills
- Too Faced Cosmetics
- Kat Von D Beauty
- Fenty Beauty
- Urban Decay
- Kiko Milano
- Tarte Cosmetics
- Morphe Brushes

As a group, Digital Giants' engagement rate per Influencer is nearly three times higher than that achieved by the Power Players.

Out of the three categories, Digital Giants have the highest amount of Mega-Influencers in the 1M+ follower group. However, unlike the Power Players, the Digital Giants are better together. Our analysis revealed that brands within this segment achieve the highest media value when mentioned in combination with other brands, compared to individually. But which Digital Giants are performing the best overall?

Source: Wearisma Data
Country: France
Timeline: Q4 2018



















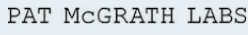

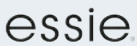



Source: Wearisma Data
Country: France
Timeline: Q4 2018

DIGITAL GIANTS

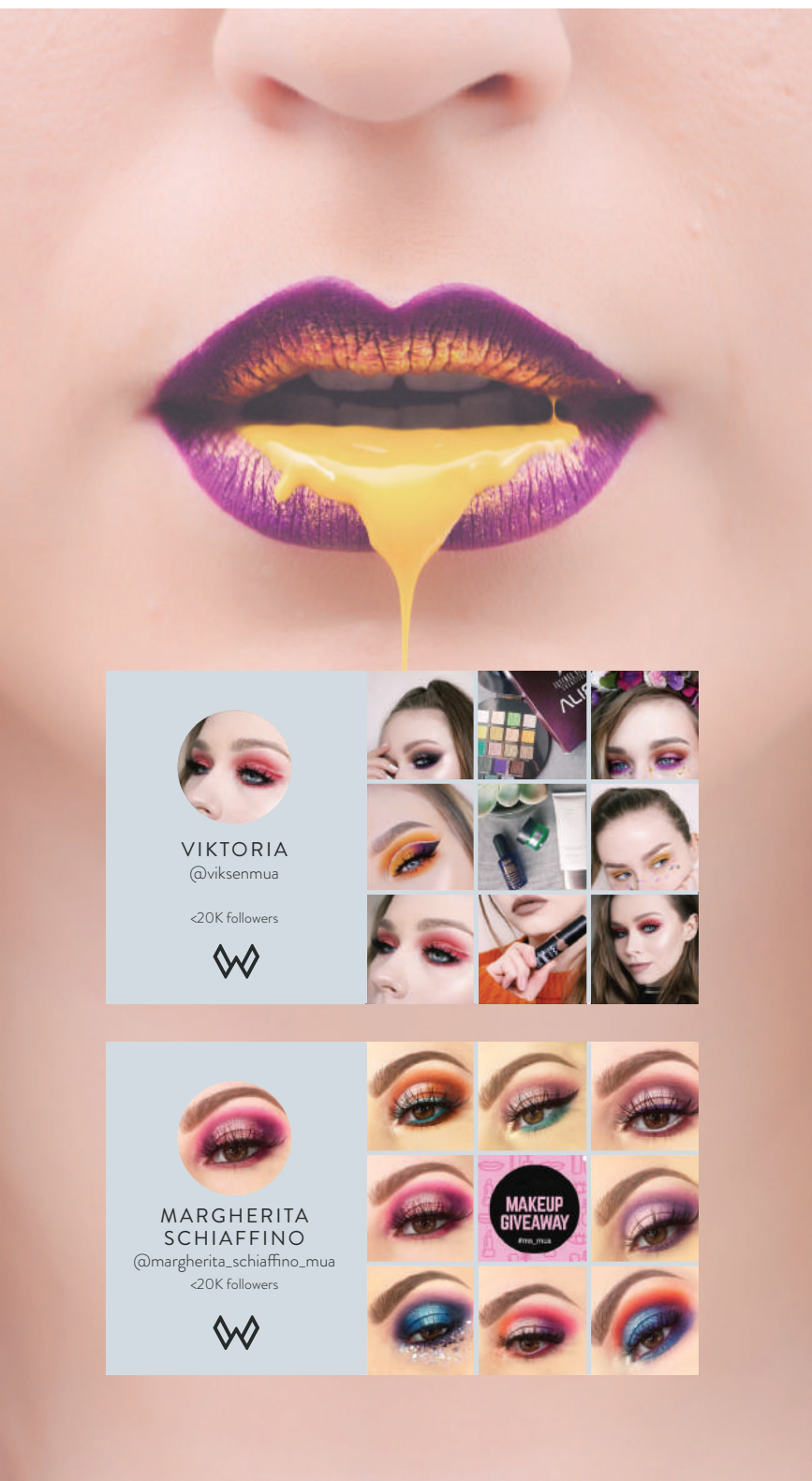
Top Mentioned French Beauty Brands in Q4 2019

RANK

1		NYX Cosmetics France
2		Huda Beauty
3		Anastasia Beverly Hills
4		Kat Von D Beauty
5		Too Faced Cosmetics
6		Fenty Beauty
7		Urban Decay
8		Kiko Milano Makeup
9		Tarte Cosmetics
10		Morphe Brushes
11		Jeffree Star Cosmetics
12		Make Up Revolution
13		Becca Cosmetics
14		Laura Mercier
15		Lime Crime
16		Kylie Cosmetics
17		Pat McGrath Labs
18		Charlotte Tilbury
19		Essie
20		House of Lashes



No. 1: NYX COSMETICS FRANCE



NYX Cosmetics' French account is the most mentioned Digital Giant and their focus on consumer-generated content is a key element of their success. NYX has the highest number of Influencers with <20K followers, and this is reflected in the content that the brand produces.

For example, NYX Cosmetics' French account frequently reposts content from Micro-Influencers and Nano-Influencers, including Viktoria (@viksenmua) and Margherita Schiaffino (@margherita_schiaffino_mua). NYX's [Sara Aziz](#) suggested that reposting content from such Influencers emphasizes the accessibility and ease-of-use of their products by saying: "We give them the tools that enable them to go out and do it themselves".

The top four Influencers producing the most content featuring NYX are MUAs producing avant garde and artist looks for the the eyes and eyebrows. These Influencers include the likes of Bordelaises MUA 'MaybeArtist' (@maybeartist_) and Freelance MUA Isley (@isleymua).



NUDE

HUDA BEAUTY

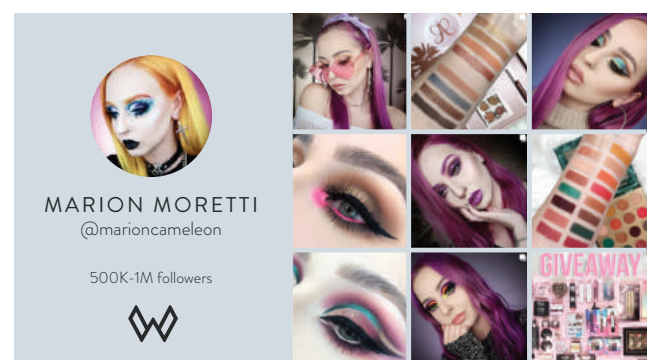
Source : Shophudabeauty.com

No. 2: HUDA BEAUTY

Only six years old, Huda Beauty is one of the fastest growing beauty brands in the world, and is the second most mentioned beauty brand by French Influencers. Last year, the digital giant sold a small stake to TSG - Consumer Partners, whose reputation for acquiring small brands and turning them into global forces is perhaps indicative of Huda Beauty's increasing success.

Although false eyelashes were the first product from the brand, our analysis revealed that Huda Beauty's #NewNudePalette was one of the most mentioned branded hashtags within the eyeshadow category. Similarly, the Influencers driving Huda Beauty's mentions include Marion Moretti (@marioncameleon) and Ioanna Kourti, (@nixevmakeup) who create content with a focus on bold eye makeup. As a result, Huda Beauty might find increased success in France by focussing on beauty Influencers with a similar niche focus.

Founder Huda Kattan has maintained her Influencer status by continuing to blog about her own as well as other beauty brands on her digital channels, and maintaining high levels of engagement. This tactic adds another layer of authenticity to the Huda Beauty brand and, as highlighted by the data, is clearly enjoyed by French audiences.



No. 3: ANASTASIA BEVERLY HILLS

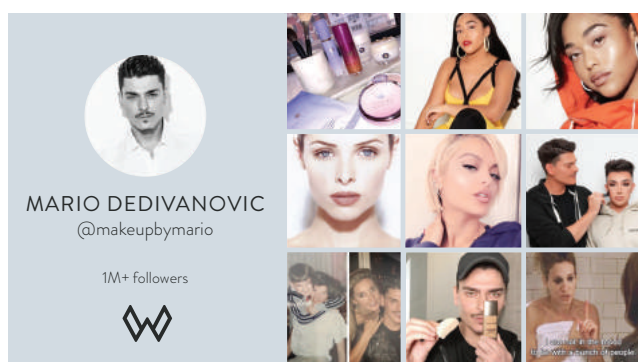
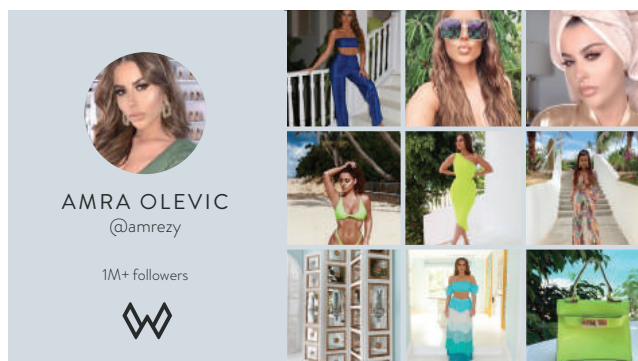
Hailed as one of the most engaging beauty brands, Anastasia Beverly Hills (ABH) is the third most mentioned Digital Giant, earning 18.6 million Instagram followers since joining the social media platform in 2012. Like Huda Beauty, ABH can credit a lot of their success to high levels of engagement on Instagram.

Where most of the Digital Giants can credit their success to a diverse Influencer portfolio of Beauty and Fashion Influencers, ABH achieves the highest engagement rate and media value by having a strong focus on partnering purely with Beauty Influencers.

This finding appears to be replicated globally as a report by Octoly which found that ABH generated the highest number of posts (4,594) and interactions (7.38M) among US Beauty Influencers in March 2018.

Whilst the brand works with more than 600 Influencers, many of whom are up-and-coming, it's likely that the brand's collaborations with Mega-Influencers like Amra Olevic (@amrezy) is a strong factor of its success. The success of this

particular collaboration is backed by the revelation that the sold-out highlighter was recently relaunched. Last year, the brand also collaborated with Kim Kardashian's MUA and Mega-Influencer (with more than 5 million followers) Mario Dedivanovic (@makeupbymario). This method has tracked well with fellow Mega-Influencers, with ABH having the highest number of Mega-Influencers alongside Huda Beauty, Kat Von D Beauty and Tarte Cosmetics.



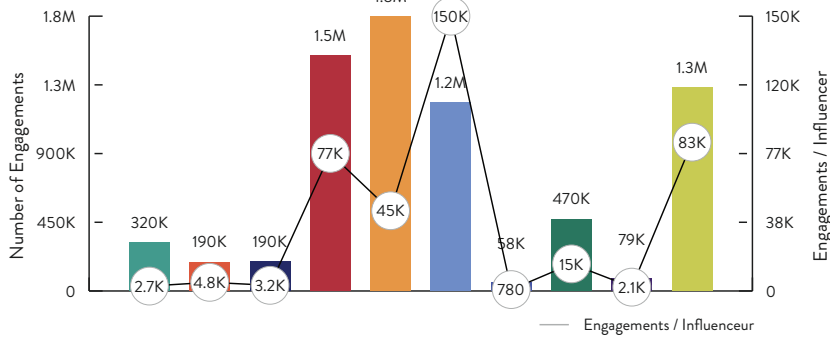
Source : Instagram/@Amrezy



Indie Brands

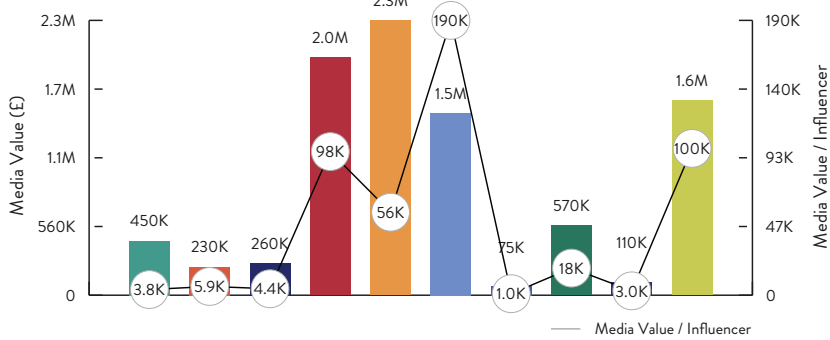
INDIE BEAUTY BRANDS ARE EXPANDING AT A RAPID PACE, WITH REPORTS INDICATING THAT SMALL AND MEDIUM SIZED ENTERPRISES (SMES) MAKE UP MORE THAN 80% OF ALL COSMETIC MANUFACTURERS IN FRANCE.

NUMBER OF ENGAGEMENTS AND ENGAGEMENTS PER INFLUENCER



As expected, due to their age, the Indie Brands have the smallest number of Influencers. However, our analysis revealed that on average Indie Brands achieve a higher engagement rate and media value per Influencer than the Power Players, (particularly Swedish independent brand, Linda Hallberg Cosmetics), and cements the strength of brands within this segment.

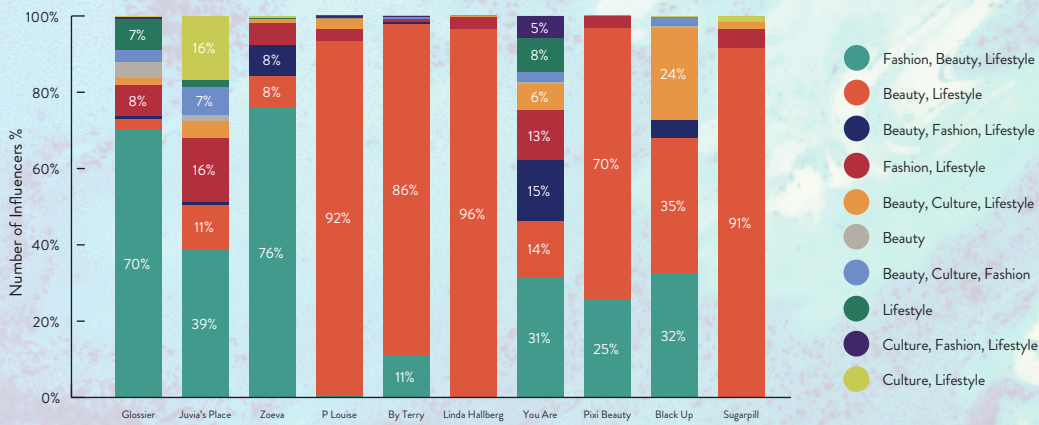
TOTAL MEDIA VALUE AND MEDIA VALUE PER INFLUENCER



Unlike the Power Players and Digital Giants, Indie Brands achieve a higher media value from Beauty and Lifestyle Influencers suggesting that brands within this sector should work with French Influencers, with a specific focus on Beauty.

- Glossier
- Juvia's Place
- Zoeva Cosmetics
- P Louise Cosmetic Brand
- By Terry
- You Are Cosmetics
- Linda Hallberg Cosmetics
- Pixi Beauty
- Black Up
- Sugarpill

MEDIA VALUE BY CONTENT CATEGORY



Source : Wearisma Data
Pays : France
Période : T4 2018









Source : Wearisma Data
 Pays : France
 Période : T4 2018

INDIE BRANDS

Top Mentioned French Beauty Brands in Q4 2019

RANK

1	Glossier.	Glossier
2		Juvia's Place
3	ZOEVA	Zoeva Cosmetics
4	<i>P.Louise</i>	P.Louise Cosmetics Brand
5	BY TERRY	By Terry
6		Linda Hallberg Cosmetics
7	UR YOU ARE COSMETICS	You Are Cosmetics
8	pixi	Pixi Beauty
9	black Up	Black Up
10		Sugarpill
11	<i>Djulicious</i> COSMETICS	Djulicious Cosmetics
12	NABLA	Nabla Cosmetics
13	COLOURPOP	Colour Pop
14		The Balm
15	nudebynature	Nude by Nature
16	OLAPLEX.	Olaplex
17	gisou	Gisou
18	BALIBODY	Bali Body
19	<i>Sananas</i> BEAUTY	Sananas Beauty
20	GARANCIA® PARIS	Garancia



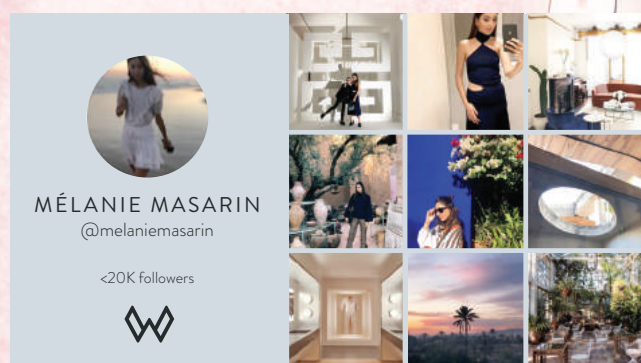
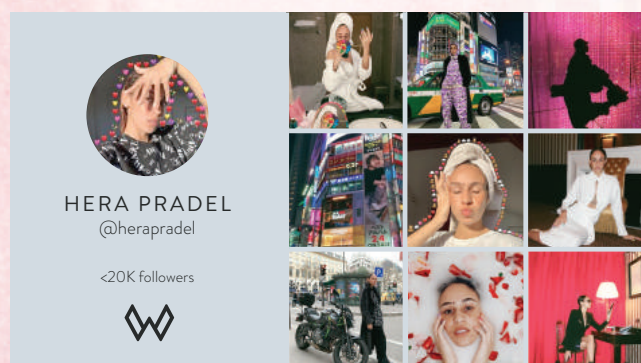
No. 1: GLOSSIER

Glossier is the top mentioned Indie Brand by French Influencers and our data shows that Glossier achieves the most engagements when mentioned by themselves than in combination with other beauty brands. The 'millennial cult favourite' has rapidly earned 1.7 million Instagram followers (as of January 2019) since their inception in 2014.

Rather than relying on celebrity endorsements and partnerships with Mega-Influencers, Glossier founder Emily Weiss claims to "believe in the power of the individual. And if you have many [individuals] who are electing your brand, who are excited about it and talking about it, then that is the equivalent of 10 Kardashians." The success of this tactic is supported by our analysis which found that Glossier has more Influencers in the <20K follower group than the other Indie Brands.

Similar to MAC, the individuals producing the highest engagement rate for Glossier includes those who currently or have previously worked with the brand, including model Hera Pradel (@herapradel) who features in of the brand's campaigns and Glossier's Head of Retail and Offline Experiences, Mélanie Masarin (@melaniemasarin).

Glossier takes a personable approach to content, urging its copywriters to engage with followers and consumers as if they were 'best friends'. Their positioning within our rankings coupled with the fact that 80% of their growth and sales come from peer-to-peer recommendations or their own channels suggests that this digital strategy is received well by French audiences.



No. 2: JUVIA'S PLACE

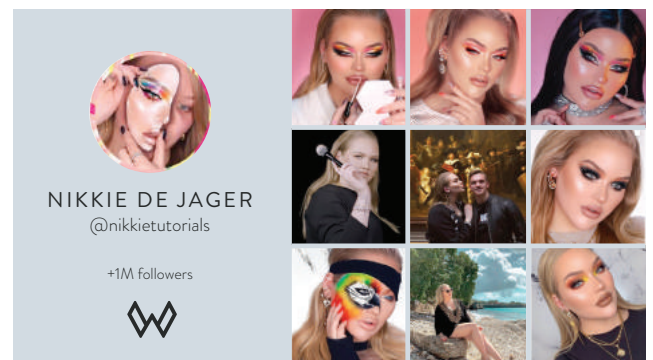
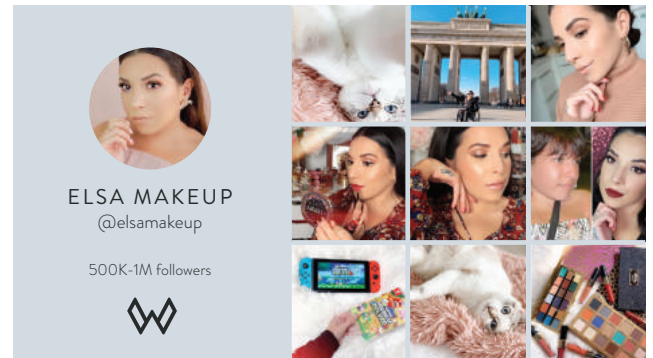
Founded in 2013 by Nigerian born Chichi Eburu, Juvia's Place is the second most mentioned beauty brand by French Influencers. Juvia's Place is also the most mentioned black-owned indie beauty brand and the owner's African heritage is heavily reflected throughout the brand with Egyptian Queen, Queen Nefertiti featuring frequently on the brand packaging. Therefore, it could be argued that the increased spending power of ethnic minorities in France is a driving factor behind the brand's popularity.



Source : Instagram/@JuviasPlace

Moreover, our analysis revealed that the top three Influencers producing the highest media value for Juvia's place is Disabled Influencer Elsa Makeup (@elsamakeup), male Influencer Richaard (@richaard2609) as well as Emilie Lapuly (@emilielapuly) who is a woman of colour. These results suggest that such individuals who have been historically ignored by the beauty industry should be recognised, particularly by the emerging Indie Brands as the industry shifts towards being more inclusive.

Whilst the company produces lipsticks, brushes and highlighters, their standout products are their eyeshadow palettes. As our findings show that eyeshadows are among the most popular products in France, it is understandable how Juvia's place achieved the number 2 spot in this list. The promotion of the brand by Mega-Influencer Nikkie de Jager (@nikkietutorials) who hailed the brand's Magic Palette as "the world's most pigmented eyeshadow palette" was sure to be acknowledged by French beauty Influencers.



No. 3: BY TERRY

By Terry is the most mentioned independent French beauty brand and the fifth most mentioned independent beauty brand overall. The brand was founded in 2000 by former Make Up Artist Terry de Gunzburg who launched the brand during her position as Creative Director of YSL Beauté. As the creator of YSL's famous Touche Éclat highlighter pen, Gunzburg's By Terry pays particular attention to innovation, offering high-tech products such as the Densiliss foundation, that has a dual function as skin care and as coverage. Such dual-functioning products or 'Cosmeceuticals' have obtained particular popularity in the French market. The fact that said products are considered to be the next wave of growth within the beauty industry may be another factor why By Terry and their focus on the technological element of beauty has earned this position within our rankings.

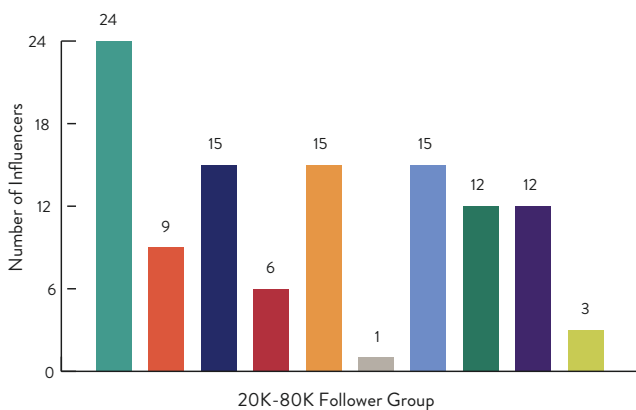
Unlike the other brands across all three categories, By Terry is the only brand that has more Influencers in the 20K-80K follower group than the <20K follower group. This is supported by our findings that the majority of Influencers who create the most content featuring By Terry have more than 20K followers - thus suggesting that Indie Brands do not always have to align themselves with Micro-Influencers in order to gain traction online.



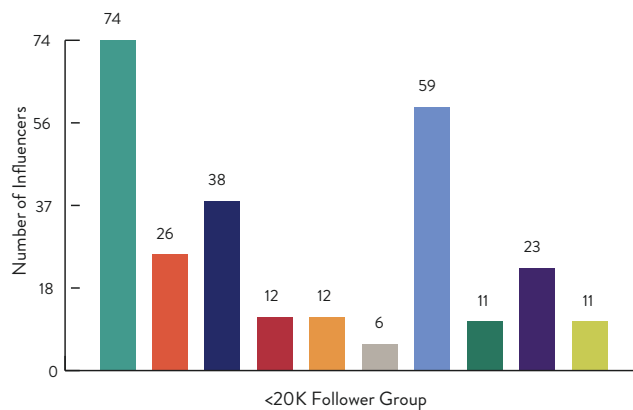
Source : Instagram/@terrydegunzburg

Source: Wearisma Data
Country: France
Timeline: Q4 2018

NUMBER OF INFLUENCERS BY FOLLOWER GROUP



NUMBER OF INFLUENCERS BY FOLLOWER GROUP



● Glossier
 ● Juvia's Place
 ● Zoeva Cosmetics
 ● P Louise Cosmetic Brand
 ● By Terry
 ● Linda Halberg Cosmetics
 ● You Are Cosmetics
 ● Pixi Beauty
 ● Black Up
 ● Sugarpill



5



**Wearisma's
Ones To Watch:**
KEY INFLUENCER
PERSONAS FOR 2019

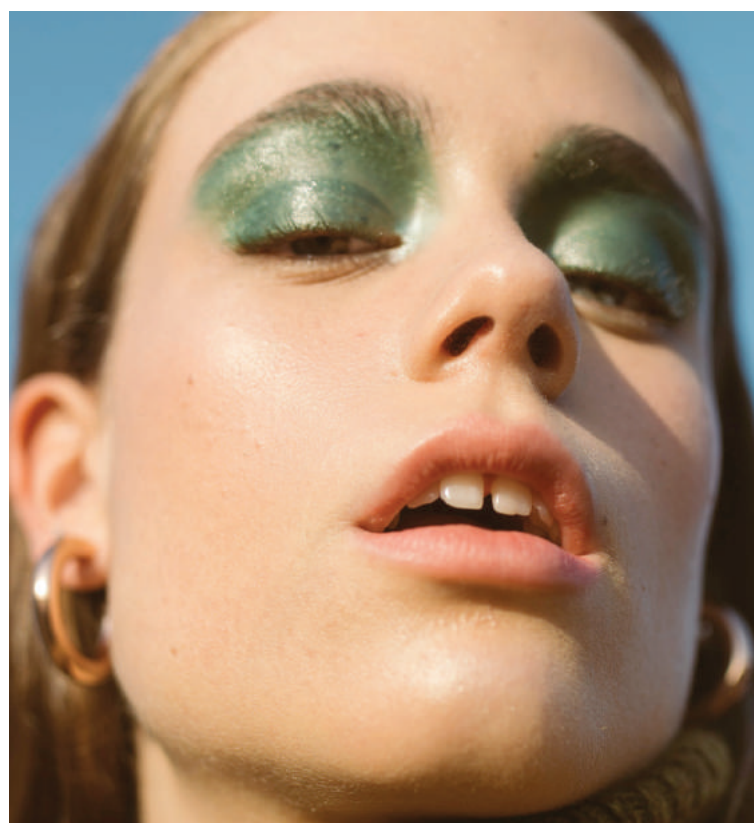
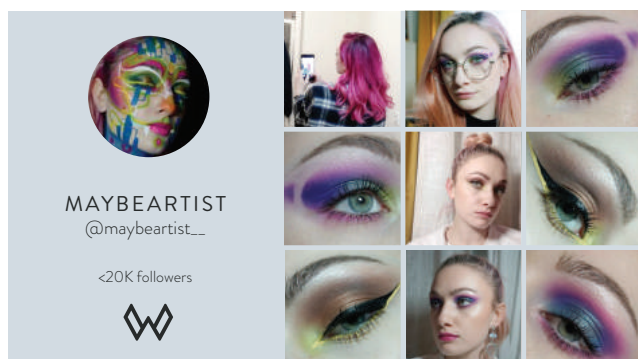
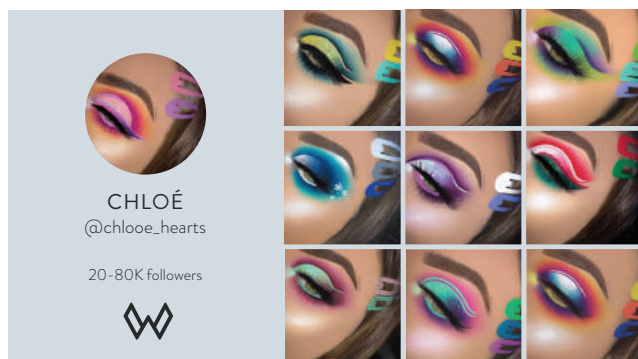


Having illustrated which beauty brands are making the best use of Influencers in France, in this section we will identify 4 Key Influencer Personas in France that beauty brands should be working with in 2019.



Profile 1: SPECIALISED MUAs

The Influencer that received the highest engagement rate (38.93%) for MAC's French account and the third highest engagement rate for @anastasiabeverlyhills (22.45%) is Certified MUA Chloé (@chlooe_hearts). While self-taught MUA 'MaybeArtist' (@maybeartist_) produces the highest amount of content for NYX's French account, what these two Influencers have in common is that they are both MUAs who specialise in eye and brow makeup and this specialization is reflected in their content.



Despite producing a range of products, brands like ASB have been able to build a strong social media presence based on content focusing on a singular feature, such as (eyebrows). These results suggest that, specifically when promoting eyeshadow palettes and brow makeup, Digital Giants in particular will find success by collaborating with Specialised MUAs who are able to provide a wealth of content focusing on this particular product category.

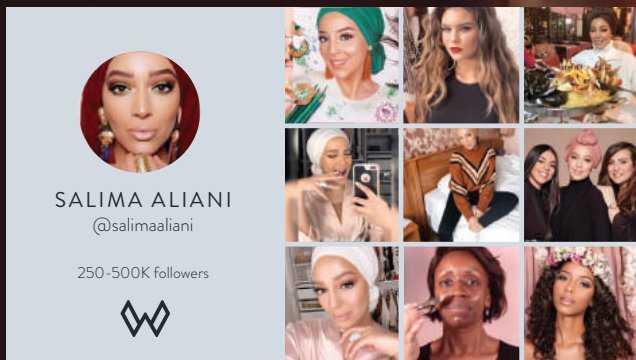




Profile 2: INFLUENCERS OF COLOUR


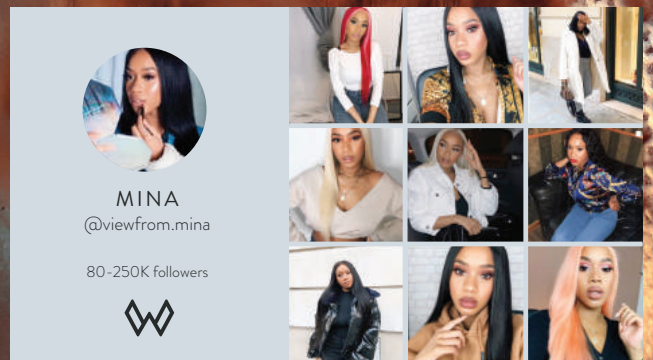
Within France, ethnic minority Influencer Salima Aliani (@salimaaliani) and Professional MUA Adjinaya (@adjinaya) produce the second and fifth highest media value respectively for content featuring Power Player, MAC cosmetics. Minority Influencer Jadiz (@jadizmua) produces the highest amount of content for Indie Brand, Juvia's Place whilst ethnic minority MUA Elodie (@makeup_tendances) produces the second highest content for Digital Giant, Huda Beauty.

The top two Influencers achieving the highest engagement rate for content featuring NYX include ethnic minority Influencers Yanissa (@yanissaxoxo) and Mina (@viewfrom.mina). These findings, coupled with research showing that, in France, a lack of representation can cause ethnic minorities to consume less media, suggests that across all categories beauty brands should collaborate with Influencers of Colour.


SALIMA ALIANI
@salimaaliani

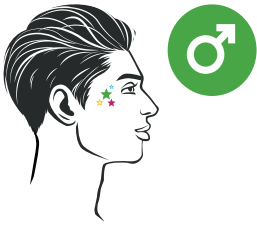
250-500K followers

MINA
@viewfrom.mina

80-250K followers



Profile 3: BEAUTY BOYS & MEN

The expenditure per capita for personal care items of French men was reported to be twice as high as that of American men in 2009. Recent research has also indicated that the male grooming industry grew by 6,000% between 2012 and 2016, and our results indicate that these figures continue to climb.

Out of the top five Influencers producing the most content featuring NYX Cosmetics, more than half of those are male. Similarly, male MUA Raphael (@dolly__page) produced the highest amount of content for Tarte Cosmetics and Kat Von D and third highest for Anastasia Beverly Hills. Male Photographer Yves Kortum (@yveskortum) produces the highest media value for Make Up For Ever and beauty Influencer Richaard (@richaard2609) has the fourth highest media value and engagement for content featuring Huda Beauty.



MUA RAPHAEL
@dolly__page
<20K followers

RICHAARD
@richaard2609
80-250K followers

Beauty brands, particularly Power Players and Digital Giants, should capitalise on this growing trend by working with Beauty Boys & Men who are often proven to be just as successful, if not more so than their female counterparts.



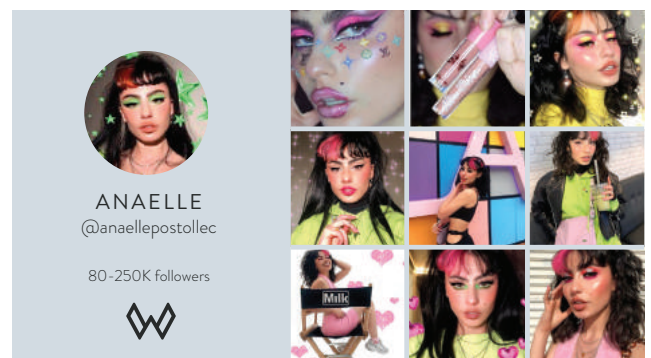


Profile 4: AVANT GARDE ARTISTS

When analysing the Influencers performing well with Digital Giants, we found that Parisian-based MUA Anaelle's (@anaellepostollec) content featuring NYX cosmetics sits in the top five for highest media value and her more adventurous looks featuring NYX products achieve higher levels of engagement.

Avant garde MUAs Marion Moretti (@marioncameleon) and Corentin Chotard (@Le_Menestrel) achieved the highest media value and engagement rate for their eccentric looks feature Indie Brand Linda Hallberg Cosmetics.

However, our analysis shows that beauty Influencers do not have to create a series or even consistently produce whimsical content in order to be successful. Influencer @mai_tep, who mostly produces commercial beauty looks achieved the highest engagement rate for Tarte Cosmetics for her content featuring halloween skeleton makeup. Pinterest's Global Beauty Report 2018 found that Artistic makeup is up 88% in France. These findings suggests that both Digital Giants and Indie Brands should pivot towards Influencers who embrace and incorporate more daring/artistic looks into their usual content.



6



**Crowd Pleasing
Cosmetics:**
WHICH PRODUCTS
WORK BEST WITH
INFLUENCERS?





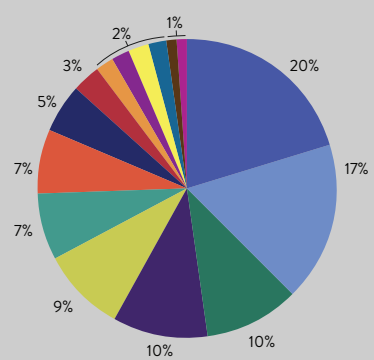
Wearisma have found that, during Q4 2018, Influencers were more effective at pushing content featuring colour cosmetics than other beauty products.

This is supported by a report by [Statista](#) which has credited social media for a 'noticeable upturn in the usage of colour cosmetics', surpassing skincare to become the fastest-growing beauty category since 2012.

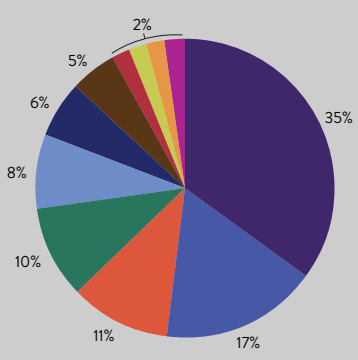
When embarking on an Influencer Marketing strategy, beauty brands should know that Skin makeup, Lip cosmetics and Eyeshadows perform best online with French audiences.

Source: Wearisma Data
Country: France
Timeline: Q4 2018

SHARE OF VOICE BY CONTENT COUNT



SHARE OF VOICE BY MEDIA VALUE



- Lips (Make Up)
- Eye Shadow/Palette (Make Up)
- Skin - Colour (Make Up)
- Skin - Base (Make Up)
- Perfume & Fragrances
- Eyelashes (Make Up)
- Creams & Seriums (Skincare)
- Eyebrows (Make Up)
- Tools (Make Up)
- Nails (Make Up)
- Face Masks (Skincare)
- Eyeliner (Make Up)
- Haircuts & Styles (Haircare & Hair styling)
- Soap & Showergels (Bodycare)
- Hair Products (Haircare & Hair styling)



Lip Cosmetics



Lip cosmetics are the ‘most discussed’ products - generating the biggest buzz online. These sentiments are reflected in a 2017 report from Cosmetics Business which emphasizes the key role that lipstick sales have in boosting France’s cosmetics market.

A 2015 “Lipstick Colours Of The Year” report indicated that Dusky Rose was the most popular shade in Paris. However, our analysis of influencer attitudes reveal that French audiences engage most with content featuring bolder lip colours, with red being the most mentioned lipstick shade. MAC is the brand most associated with ‘Red Lips’, whereas the French

equivalent ‘rouge à lèvres’ is most associated with Sephora. These findings show that beauty brands, evidenced by Power Players like MAC, should utilise Influencer Marketing for bold coloured lipstick launches in particular, as these products get greater traction when promoted by French beauty Influencers.

Our analysis also revealed that ‘gloss’ does very well in the realm Influencer Marketing and received 3 times the number of mentions than ‘matte’ and ‘liquid lipstick’. Glossier is the top mentioned brand in this subsection of lip cosmetics. Indie Brands like Glossier should capitalize on the effectiveness of Influencers to promote Lip Glosses, which are slated as being a major makeup trend for Spring Summer 2019.



Eye Shadow



With Lip Cosmetics being the most talked about product, Eyeshadows and Eyeshadow palettes receive the most engagement from French audiences.

Huda Beauty leverages Influencer Marketing really effectively and is the most mentioned brand within this product category. For instance, Huda Beauty's #NewNudePalette, which includes a brand exclusive 'colour-changing formula with shimmering pearl flecks', is currently the most mentioned branded hashtag, despite only being released a few months ago in November 2018.

The second most mentioned brand within this product sector is Anastasia Beverly Hills with the brand's Norvina Eyeshadow Palette being among its 2018 bestsellers. Similar to the New Nude palette, the Norvina Palette contains "14 whimsical shades ranging from bold and bright mattes to soft pastel metallics". The third most mentioned brand NYX cosmetics, which prides itself on its strength in producing vibrant colours, has 'glitter' as its most associated term within this product category.

It is typically believed that French Beauty is defined by minimal makeup. However, this analysis suggests that beauty brands should collaborate with Avant Garde French beauty Influencers who are able to create bolder looks that will allow them to effectively promote their more popular, colourful palettes.





Source : Instagram @NYXCosmetics/@Alissa.Ashley

Skin – Base makeup

The final product type that beauty brands are encouraged to promote through Influencers is Skin Base makeup products (including foundations and concealers). Content featuring these products are particularly profitable and achieve the highest media value and third highest level of engagement.

The most mentioned brand within this product category is NYX, which recently partnered with African American beauty Influencer, [Alissa Ashley](#) for the release of its 'Can't Stop Won't Stop' foundation, complete with 45 shades. A significant reason for the online discussions surrounding range is not only the fact that it is among the largest shade range offered by any beauty brand, but it also contains 5 shades more than Fenty Beauty - who gained popularity by addressing the industry's failure to cater to darker shades. It is important to note that MAC, the third most mentioned brand within this product category, also has a history of catering to ethnic minority consumers and in their 2017 Future Forward campaign, featured four women of color in the music industry: Tinashe, Halsey, Lion Babe and DeJ Loaf.

Therefore, it is suggested that when promoting Skin Base makeup, beauty brands should consider collaborating more with Influencers of Colour. Not only will this allow

them to promote the diversity of their product offerings, it will also appeal to ethnic minorities consumers in France whose increasing purchasing has been described as a “great opportunity” within the region.



Source : maccosmetics.com





Conclusion

THE ROLE OF INFLUENCERS WITHIN THE FRENCH BEAUTY MATRIX IS CRUCIAL TO THE HEALTH OF THE MARKET AND INDICATIVE OF WIDER TRENDS.

Increasingly, the digital conversation surrounding beauty in France demonstrates a considerable creative evolution. Signature French Influencer content now indicates a greater accent on diversity, exploration, and innovation, with up-and-coming Indie Brands accruing an evermore powerful voice within the market. With so many Influencers and brands collaboratively thinking outside the box, and thus expanding the narrative of what French beauty truly encompasses, the industry is growing rapidly into much more diverse territories.





Glossary

Influencers

Influencers are self-made publishers who make a living discussing and reviewing products as experts online.

- Beauty Influencers must have a significant following and are experts within the field of beauty, mostly discussing beauty products and trends.
- As experts in their fields, Influencers often use and review products for their followings organically, without payment or invitation by the brands.
- Due to their position, Influencers can be paid by brands to represent them, wear and review their products.

Coverage not Sales

Influencer activity is not representative of a sales ranking - it is simply indicative of the conversations that are happening online.

Based in France

Our analysis covers the conversations of Influencers based in France. This will include French influencers and also non-French influencers who live, work and consume products in France.

Brand Ranking

When ranking brands, we measure popularity by how often influencers are tagging a brand's account.

Brand Segmentation

We have split the brands into the three sections - Power Players, Digital Giants and Indie Brands. This is because we see a lot of disruption and innovation in these three segments. Indie Brands exploding online to become Digital Giants and then being acquired by Power Players (the brands who traditionally top the sales tables).

Products

When looking at products, we have focused on which products are mentioned most and generate the most media value by Influencers.



Wearisma was founded by a group of tech and digital media professionals, passionate about building the most intuitive influencer marketing technology that seamlessly fits into your organisations. We specialise in taking into account the nuances of how culture, perception and quality differ by geography and by organisation. Wearisma's technology combines analytics and intelligent automation with human creativity, and ensures that brands receive high-quality results and clear insights in order to create effective campaigns.



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