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Glossier: Co-Creating a Cult Brand with a Digital Community

Forging personal relationships among people through the sharing of digital content was foundational to Glossier, a digitally native, direct-to-consumer beauty brand. The company described its strategy as “born from content, fueled by community,” and its community was squarely at the center of everything it did. Its brand had emerged from a popular beauty blog, *Into The Gloss*, launched by founder and CEO Emily Weiss, which provided data from 1.5 million passionate readers to help inspire new products and an army of enthusiastic brand advocates to proselytize the brand.

Engaging Glossier’s growing community was on the minds of Senior Vice President of Marketing Alexandra Weiss^a (HBS ’15) and President and Chief Financial Officer Henry Davis as they debated marketing strategy for the second half of 2018. The company, following multiple fundraising rounds that had yielded \$86 million from venture capital investors, had grown rapidly, with sales up 600% in 2017. Despite this success, Emily had even larger ambitions. She dreamed of using relationships to fundamentally change the way women discovered and purchased beauty products – to create a social brand sold via human-centered social commerce. She explained,

I think there is a massive opportunity. There is much more for us to continue to solve, if we can truly create a new brand paradigm. How can we create the first socially driven brand, the first beauty brand that involves its community in its creative process? We want to do that by inserting people into the buying experience, so that we’re merchandising people’s opinions and stories just as much as we are merchandising products. We’re striving not for a breadth of assortment like Amazon, but rather for a breadth of human connections.

Weiss and Davis were debating marketing strategies that recognized the opportunities and challenges of managing Glossier’s rapidly scaling customer community, which had grown threefold in 2017. In February 2018, the company had closed an oversubscribed \$52 million Series C round. This gave them a lot of runway to think about new ways to acquire, engage, and retain customers, beyond the company’s traditional reliance on owned and earned investments in *Into The Gloss* and Instagram and direct-to-consumer e-commerce sales. Most of its growth had been organically derived from these

^a Alexandra Weiss coincidentally shares a name with founder Emily Weiss, but the two are not related. For simplicity, Emily will be referred to as “Emily” throughout the case, while Alexandra will be referred to as “Weiss.”

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millennial-friendly digital properties that allowed the company to pursue what *Racked* dubbed “no-commerce commerce” and “marketing without marketing.”¹ As they looked to the future, the three were considering whether the company’s next phase of growth would need to be fueled by a greater emphasis on paid media and/or a more physical market presence. They were debating whether to convert Glossier’s evangelistic consumers into paid peer-to-peer sales representatives, whether to engage professional influencers, and how to continue to use the community to inspire new product ideas as it diversified beyond early adopters. On the table was also a question of whether to expand Glossier’s availability beyond the digital to physical retail.

Creating a Trusted Voice and Building a Community

Emily, a former art student and styling assistant at fashion magazines *W* and *Vogue*, had achieved an almost mythical status. *BuzzFeed* dubbed her the “patron saint of dewy skin, no-makeup makeup.”² *Forbes* named her to its 2015 “30 Under 30” list when she was 29, just a few short years after she launched *Into The Gloss* in 2010 at age 25. She recalled the impetus for its founding:

When I started *Into The Gloss*, I wanted to make beauty as much of an element of personal style as fashion. As I interviewed hundreds of women, I became more aware of how flawed the traditional beauty paradigm is. It has historically been an industry based on experts telling you what you should or shouldn’t be using on your face. I wanted to reinvent the beauty experience by creating a brand that celebrates you for who you are today, and isn’t prescriptive about what you should or shouldn’t use in your routine.

She filled *Into The Gloss* with high-quality product reviews and comparisons, beauty how-to’s, and intimate, behind-the-scenes tours into the daily beauty routines of inspiring individuals who opened their medicine cabinets to Emily for private “Top Shelf” interviews (see **Exhibit 1**), dubbed by voyeuristic readers as “medicine cabinet porn.” Participants revealed the products they used and spoke candidly about their own issues and insecurities, from aging to acne. The series encouraged readers to proudly share their own beauty routines, using the hashtag #itgtopshelfie (see **Exhibit 2**), something that society had made women reluctant to talk about.

Entrepreneur described the blog’s writing as “cultivated but conversational, light but not silly; the graphic design, sophisticated and inviting; and the photography, beautiful.”³ Emily declared, “*Into The Gloss*’s beauty authority is bolstered by our access to industry experts and award-winning content. We are the internet’s hub for quality beauty conversation.” Emily and a team of four were soon publishing four stories per day and attracting 1.5 million unique visitors and 10 million page views per month. Conversations were happening, with most posts receiving hundreds of comments from readers, who shared their routines, swapped beauty tips, and provided product reviews. Recalled Emily, “Everyone can be their own expert, their own curator . . . we’re encouraging everyone to build their own top shelf, making active a whole range of women who were otherwise passive beauty consumers.”⁴

This activity kept advertisers like Lancôme, who used *Into The Gloss* to reach prospective customers, happy. Advertising revenue soon reached \$5 million. However, explained Davis, *Into The Gloss* was much more than a platform for selling products:

Into The Gloss isn’t about product. It never really was. It’s about the person wearing the product. It’s a way to discover products, but that influence comes from the story of a person and an affinity that you have for them. Its sole purpose is to inspire and activate people to talk about beauty and to bring them together. It’s about owning the discovery piece of the funnel. We just want to have a conversation with you.

By 2014, it had dawned on Emily that her intimate conversations with 1.5 million *Into The Gloss* readers and her social media interactions with 200,000 Instagram followers and 60,000 Facebook fans were yielding incredible insight into the current state of the beauty market. She noted,

There wasn't one "aha" moment. I love all the beauty products I use and yet there has not been a brand that has come to define my generation. I want to think about what beauty means today . . . What do people want? What do they care about?⁵ Women today have different needs than we have had in the past, but beauty companies haven't necessarily been the most reactive to that.⁶ There wasn't a brand that spoke to women in an approachable way, while delivering a luxury experience and encouraging beauty as a part of an overall personal style . . . we set out to demystify beauty and create basics inspired by the content and conversations from the beauty blog.⁷

She decided to create a new brand, Glossier, to house a curated and edited collection of products to fulfill the desires of her community. She saw Glossier's launch as an evolution of her initial mission for *Into The Gloss*, but with an opportunity to turn her written content into tactile products. She said,

With years of insight on what women want and expect from their products, and having tested and scrutinized countless products ourselves, we launched our vision of the modern beauty essentials . . . Our editorial approach is the key ingredient to Glossier's success—we're product experts, we're content experts, and we're experts at building our community. We're reinventing the beauty experience for girls who aspire to be proud of who they are. We believe in democratizing beauty . . . having conversations, the power of individuals, beauty in real life. Glossier will be a modern beauty brand made by editors in NYC who "get" what works, inspired by what girls want in real life.

Partnering with a chemist and a contract manufacturer, she developed plans to launch four everyday essentials for which her readers were clamoring. She also began talking to Kirsten Green, founder of Forerunner Ventures. Recalled Green, who provided \$2 million in seed capital, "I see a lot of beauty brands that are beautiful, but we're trying to work with founders who are looking at the entire thing holistically, from a unique viewpoint. What Emily was pitching was a multilayered vision. She wasn't out there pitching Glossier; she was really thinking differently."⁸ A few months later, the products were ready for Glossier's October 2014 launch. *Into The Gloss's* readers were the first to hear about it, via a friendly, personal blog post from Emily (see **Exhibit 3** for excerpts).

Taking on Big Beauty

Glossier was operating on the forefront of an emerging, more democratic beauty paradigm, one fueled by consumer-to-consumer conversations on social media that challenged the previous hegemony of big brands. Emily described it as follows:

In the past, there was homogeneity in beauty. Women were told by the big beauty companies what was beautiful and then aspired to achieve that image. There wasn't a plethora of options, there wasn't a plethora of influence. Today, beauty is all about individualism. It's about making individual choices based on an endless array of beauty content. It used to be that brands were the sole owners of opinion; that's no longer the case. Influence has been completely decentralized and now is in the hands of individual consumers. You don't have to listen to a brand, you can listen to literally hundreds of people. Social media is the gateway to this transformation. Sixty percent of women say that the #1 reason they are persuaded to buy a new beauty product is because of a peer's

recommendation. That doesn't mean sitting across from each other in person. That means finding peers on YouTube that you've never met who are creating videos or your friends on Instagram from around the world whom you follow.

We learned a lot from listening to people. We realized that big beauty brands were irrelevant to consumers. They didn't know where products were coming from, they didn't know the brands behind them and what their values were, and they didn't care. There was product loyalty, but the products were becoming separated from brands. A woman might say, "I love my Great Lash mascara, but I don't really give a f*% about Maybelline."

We want to reframe and create a new type of beauty brand, a new paradigm for what a beauty brand can be to a generation that is really disconnected from existing brands as a result of years of distancing. How can we make a beauty brand whose sweatshirt you want to wear? Why, in fashion, are there cultlike followings, strong affinities, and tribes forming around certain brands, but in beauty, products are just commodities?

Emily was taking on the \$433 billion global beauty industry, projected to grow to \$750 billion by 2024⁹ and dominated by eight companies (see **Exhibit 4**). While big brands had ruled for decades, more recently, niche brands were gaining ground. Over the past five years, the largest brands had lost market share to smaller brands.¹⁰ Observed an investor in the category, "Beauty is a quarter-trillion-dollar industry, and the majority of that market is comprised of products made by stodgy, slow, offline competitors that sell through third-party retailers. These are companies that only hear from their customers through focus groups and outsourced surveys. Product development is limited by shelf space constraints and quarters-old sell-through data . . . Glossier is positioned to disrupt this."¹¹

While over 80% of beauty and personal care products were still purchased through physical retailers, direct-to-consumer digital brands were gaining traction.¹² Consumers were increasingly fickle and easily swayed by peer influence, explained *Adweek*, "Whereas older generations of consumers pledged loyalty to one of two department store beauty counters, today's young women are comfortable going on Sephora.com to purchase a product they only just learned about from a YouTube vlogger."¹³ Consumers were turning to peers for product recommendations, viewing YouTube video tutorials and combing through celebrity influencers' Instagram feeds. Explained *Adweek*, "It's clear that Instagram has replaced the magazine rack as the dominant platform for discovering, engaging with, and buying beauty products."¹⁴ As a result, all brands were leveraging social media and influencer marketing to speak directly with consumers. Big brands were fighting back by launching incubator and accelerator programs for nascent brands, acquiring brands currying favor with consumers, and doubling down on research labs to search for the next wave of ingredients, technologies, or trends that could drive growth.

Community Inspired R&D

From the start, Glossier used the information its community provided in daily conversations on *Into The Gloss* as fuel for its research and development (R&D) engine, which was tasked with delivering a continuous stream of new products — launching one, on average, every six weeks, produced by contract manufacturer partners. By 2018, the company offered a carefully curated, edited line of 26 products (see **Exhibit 5**), which ranged from \$12 to \$60, placing the brand at a higher price point than mass-market and drugstore brands, but lower than most brands sold by specialty retailers or in department stores. Emily explained, "We don't offer 1,000 SKUs and 500 shades: we only make products that that the Glossier girl wants and needs."

Glossier was riding trends for natural skin. Rather than covering up with cosmetics, consumers were looking to show off their healthy skin, carefully contoured and highlighted to accentuate natural features without appearing overly fussed over. A Google search for “no makeup” yielded over 5 million results, many of which were links to tutorials on using cosmetics to achieve a fresh-faced look. *New York Magazine* described Glossier’s aesthetic as “makeup for people who are already pretty . . . It’s the idea that peeling away artifice and pomp leads to an even more thrilling beauty: the real thing . . . The makeup is for gilding your lovely lily, for people who reject the beauty-queen, done-face ideal.”¹⁵

Emily personally responded to comments as she asked *Into The Gloss* readers for their opinions on every aspect of her company. For example, as she was considering developing a new facial cleanser, she reached out via a blog post entitled “What’s your dream cleanser?” Nearly 400 comments helped her shape the Milky Jelly face wash. Her direct and timely responses and friendly, conversational tone made readers feel like they were talking to a real person rather than a nameless, faceless corporation. As a result, customers “[felt] like the brand itself was a close friend—a friend who was maybe a little older, and maybe a little cooler, who maybe moved to the city when you stayed in your hometown but never lost her sense of humor or humility—more likely to cross her eyes in a photograph than make a duck face.”¹⁶ The company initiated a Slack group and invited 100 of its top customers to engage with company representatives. Top NYC customers were invited to Glossier’s office for pizza and rosé, where they swapped stories and tested products alongside Glossier team members.

These activities stemmed from Emily’s belief that consumers were the ultimate authority on beauty. She expressed, “It doesn’t really matter what Glossier says. Like who are we to say which products are great? We are not an authority. Our voice is no more important than anyone else’s. We are a conduit and an enabler and a creator and a listener. The more we can connect consumers to each other is what’s important, not how much we connect them to us.” She continued, “The need for brands as bearers of truth, as arbiters of taste, is kind of a thing of the past. I think beauty has become liberated, democratized, and Glossier is just a brand built on those principles.”¹⁷ Davis concurred,

What does it mean to be a Glossier customer? You’re a stakeholder in all this. We’re listening to you. The brand, the products, everything we do reflects your input. We create this type of brand-customer interaction that’s much more “brand as peer” versus “brand as authority.” Think of what luxury brands do. They build this amazing temple and then chisel off a tiny bit of marble and give it to consumers and expect them to feel good about it because they get to own a small piece of something amazing. We’re building a temple and inviting consumers to come inside and be an integral part of it. If you can create a branded environment and experience for people where they can get that fix of “I just want to be a part of this”—then, it’s not about buying things. It’s about belonging to something.

Other brands, such as ColourPop, were using big data to generate new product releases in a process that replicated a fast fashion model to capitalize on of-the-moment trends in color, ingredients, or style. Glossier preferred to listen, research, and release more slowly. Due to Emily’s commitment to excellence, often a full year passed between the time Emily solicited input from the community and a new product was available in the market. For example, she experimented with over 40 formulas for the Milky Jelly product before she landed on a solution. Glossier’s community-inspired product strategy was bearing fruit. Its initial products were an instant success and many subsequent products sold out within days or weeks. By mid-2016, Glossier had 60,000 people on product waiting lists. When asked if sell-outs were a scarcity tactic designed to generate additional buzz and demand, Emily ruefully shook her head, answering, “It makes us so sad when we can’t give people what they want. Period.”¹⁸

As the team considered the future, they debated whether community input should continue to be the driving force for innovation or whether the company should invest its resources in scientists to fuel a R&D lab and exert more editorial control. Mused Emily, “You can learn what consumers want by going to Google trends to see that contouring has gone up in the last 30 days. When you have the volume of people we have on our platform, 50 million people, then we can look for trends within our own ecosystem and ask ourselves ‘which ones should we follow?’ But perhaps, we should have the final say as editors. Maybe we are approaching a time where we shouldn’t listen to the customer because we have to trust our vision for the brand.” Weiss concurred, “Our customers have asked for every type of product. We need to combine what we hear from them with our editorial instinct, which helps us understand what will make it better and different from what is on the market.”

The Glossier community grew larger and more heterogeneous, attracting new customers beyond the bicoastal millennials originally attracted to the brand. How could Emily keep up with listening to, responding to, and incorporating feedback from the now hundreds of thousands of customer comments that were coming in each week? Worried Davis, “I think authenticity is key and bringing the customer along on the journey with you. That comes from being very close to consumers. It’s hard to do if you’re a big company, but today, we’re small, we’re nimble, and we have lots of feedback loops. So, how do we sustain that as we scale?” The team also wondered whether Glossier should democratically listen to all of its customers or just a select few as it solicited new product ideas.

The team was conflicted about whether to focus new product development on hero products that would create product loyalty or to think more broadly about how to create a fuller line that would engender broader brand loyalty. Emily noted an increasing number of consumers buying multiple Glossier SKUs. She saw potential in thinking beyond individual products to building holistic consumer-brand relationships, noting, “We want to be more than just the company that makes your moisturizer. I see Glossier as the first beauty lifestyle brand. I believe Glossier is more than just beauty or beauty products. It’s a way of life.”

Building a Social Brand

As Emily thought about what she wanted her brand to be, she realized that, unlike other brands that prospered by making women feel insecure about their appearance, she wanted her brand to make them feel good about it. (Exhibits 6 and 7 highlight Glossier’s initial brand inspiration board, its mission, and its brand proposition.) Emily envisioned her prospective customers as close friends and developed a brand voice that reflected this aspiration. This was reflected in website copy that read: “Trust us, we’re you. Geeking out over beauty is fun, and we’re lucky to have a community of likeminded customers and readers who get it. We’re the beauty brand that wants to be friends with you – mostly because we’re not so much a brand as we are real people over here just trying to rethink the beauty industry and have a good time doing it.” Copywriters were given the following instructions:

Would you talk to your friends that way? We should talk about our products like we talk about any product on *Into The Gloss* – thoughtful, informative, down-to-earth, and fun to read. Typical branded copy can feel stiff, like there’s a hired agency machine behind the words rather than an actual person who lives and breathes whatever they’re writing about. When writing copy for Glossier, pretend you’re writing to a good friend.

The brand’s identity featured a simple logo, a curvy graphic G on a field of soft, washed-out pink so distinctive that consumers began taking photos of it as it appeared in nature or in everyday life and tagging them #glossierpink. The brand’s own photography featured diverse women, described by Emily as “real girls that easily convey the Glossier spirit – hopeful, positive, natural, and inspiring. We

select a mixture of posed and off moments . . . We embrace natural skin texture and actual product payoff — shine, coverage, etc. Pores and blemishes are welcome.” Many were not professional models, but rather Glossier consumers.

The brand was built to be social media-friendly. Minimalistic packaging and graphics were used because they would photograph well. Explained Emily, “We think of things from a content perspective: How would this show up in a user-generated photo?”¹⁹ Each shipment contained stickers to personalize products or festoon phones. Items were packaged in signature pink reusable bubble wrap pouches to protect them during shipping, and which were also widely used by on-the-go consumers to transport beauty essentials (see **Exhibit 8**). Weiss likened them to Apple’s highly visible ear buds: “Our pink pouch has become like white AirPods, where you see someone with one of our pouches and you just know that they are part of the Glossier community. Oftentimes, they spark conversation among strangers because that pink pouch means you have a shared connection with them.”

After customers clamored for a Glossier sweatshirt worn by model Karlie Kloss in an Instagram selfie, the team launched branded merchandise including sweatshirts, totes, headbands, and logo pins, to “give our customers a way to incorporate Glossier into her life beyond the medicine cabinet,” said Emily. She continued, “We aim to get you to be brand inspired and to have some relationship to our brand. It should be because our brand is fun; it gives an extra layer of meaning to your morning ritual and to your engagement with the product. That makes it no longer a commodity.” Added Davis, “Many brands represent something that doesn’t get beyond the bathroom. They’re tools. There isn’t that visceral response in the way that there is to a fashion brand. That’s what we’re aiming for.”

The Cult of Glossier

Consumers responded enthusiastically. *Entrepreneur* proclaimed, “Glossier inspires a kind of devotion and intrigue unmatched in the traditionally fickle beauty space,” while *BuzzFeed* remarked “the brand quickly ascended to cult status.”²⁰ Consumers acted like fan girls, posting incessantly on social media (see **Exhibit 9**) and waiting feverishly for new product releases. The continuous flow of products spurred them on; the six-week release cycle allowing time to order, use the product, share on social media, and then move on to the next one. Explaining her obsession, customer and beauty editor Tynan Sinks wondered, “Maybe it’s because Glossier feels inclusive, like any of us could be a Glossier girl.”²¹ Customer and beauty blogger Claire Carusillo proclaimed, “There’s something intimate and cliquish, almost conspiratorial, about the brand. You’re part of this crowd and you don’t want to stray from it too much.”²² Emily defined Glossier as a cult brand rather than as a niche brand for a particular sort of woman because it engendered a sense of belonging and a community for many different types of people. She explained:

You build a cult brand by focusing on values. Think about how you pick your friends, you gravitate toward people who share the same interests, beliefs, and ways of looking at the world. I want people to say, “Oh, Glossier is a brand I want to be friends with.” I want customers who I want to be friends with. It cuts both ways. That comes from a value system that’s deeply embedded and trickles down to who we hire, how we involve consumers, how we respond when they are happy and when they’re not. It’s a culture of optimism, thoughtfulness, and inclusivity that creates a cult. What is a cult if not a shared belief system and a way of living? So, a cult forms, it is not created. Like attracts like.

When asked why Glossier consumers were so engaged, Jessica White, Executive Director of Customer, cited the Customer Experience (CX) team. She elaborated, “Most CX teams are run like an operations function, where all they care about is reducing cost per customer interaction. We flipped

this principle on its head. We actually want to talk to our customers because we believe that talking to you is valuable—valuable to you and valuable to us. So, we actively listen and care what you think.”

The company focused on empowering Glossier’s customers to share their passion for the brand, outsourcing many marketing tasks to them. During the first year, the team spent little on paid marketing; instead, it drove nearly 80% of its sales from owned and earned media. Emily recalled her surprise when one month, the company sold what the team thought would be a full year’s worth of inventory, all on the wings of customers’ peer-to-peer efforts. In the second half of 2017, customers tagged @Glossier in over 50,000 Instagram posts, generating a reach of over 17 million. Recognizing their power, she proclaimed, “[Each customer] has a microphone and she’s reaching 50, 500, 5,000, or 500,000 of her nearest and dearest friends and is able to talk about her preferences.”

More than 60% of customers were between the ages of 18–35. Seventy-two percent claimed that they stayed in touch with friends on social media, and 48% said they sought opinions and inspiration from people on social media. Most came to the brand following a friend’s recommendation; peer-to-peer outreach accounted for 25% of new customers. *Into The Gloss* readers were 40% more likely to buy Glossier products, although a large percentage did not purchase the products. Explained Chief Technology Officer Bryan Mahoney, “[*Into The Gloss*] was, for a long time, older, more sophisticated, while Glossier was targeted to millennials. There’s still tremendous opportunity for us to harvest that community to Glossier.” The team declared that there was no archetype of a Glossier girl. Said Emily, “Anyone can be a Glossier girl. Glossier girls have something to say about beauty. They’re our readers, our editors, our friends. Beauty is one of their hobbies. They’re insecure some days, confident others. They have freckles, pores, scars. Our girl doesn’t need our products, but she chooses them because they make her feel great.”

Moving from Owned and Earned Media to Paid Media

Flush with cash from the Series C, Weiss and Davis were considering transitioning from a plan dominated by owned and earned media to one fueled by paid media. They were evaluating four proposals: a peer-to-peer sales representative program, a professional influencer program, a paid media plan, and a customer loyalty program.

A Peer-to-Peer Sales Representative Program

Given that Glossier had amassed significant numbers of fans, some wondered if it was worth converting these brand evangelists into paid salespeople, or “virtual Avon ladies for the digital age.”²³ Some believed that they could lend legitimacy to Glossier’s brand messaging. Explained White, “Any content the brand creates isn’t quite as authentic as what a customer is creating, even if we don’t Photoshop our photos or we shoot them on an iPhone. The moment it goes through our brand, it loses authenticity.” However, a test of a paid representative program was yielding mixed results. Only one-quarter of the reps were creating social media content regularly and most generated fewer than 25 orders. As the team contemplated scaling the program, these results raised questions about whether to invest significant resources into rep recruitment, training, and management programs and about how reps could be utilized. White explained:

When we first started recruiting reps, we looked to our loyal customers. So we ended up bringing in a lot of loyalists, but many people who were not interested in creating content and not interested in talking to others about us. Each rep taps out fairly quickly. First, not everyone wants to be a content creator or is not a good content creator. Some people just want to be loyal customers. Through peer-to-peer, what we’re able to do is

create hundreds of thousands of unique storefronts. Our customers can become our channels of distribution out in the community. But, do we really want that?

We're also thinking about how to mobilize them during the online shopping experience. When you shop at retail, a saleswoman approaches you to ask if she can help. And, most of the time, she just has a totally different style than you do, so you don't really trust her. But, what if we offer you access to lots of our reps—then we're likely to find someone who matches your style and you can choose who you want to assist in your sale. Each rep can be a trusted resource to help customers make their decisions. Maybe, we don't even need them to make the sale—they just need to convert the customer to make that decision. The actual making of the sale—we can handle that ourselves. This would allow us to work with more types of people—because the skill set necessary for closing a sale is very different from the skill set necessary for sharing with and inspiring your friends.

She was struggling to find the right incentive program and was assessing various compensation options, including in cash or in kind—offering store credit for reps' own purchases, insider merchandise not available to the public, or special access to Glossier events or to Emily. Choices included:

- Compensating reps each time they created branded content or each time they created content that garnered attention and/or engagement from desired consumers.
- Compensating reps each time they referred a customer to Glossier.com or each time a customer they referred purchased from Glossier.com.
- Compensating reps each time they assisted in a sale on Glossier.com.

As she considered her options, White reflected on her experiences with the first group of reps:

Our customers are so passionate about our brand and so hungry for it. How can we give them a piece of it? Reps care about access to us, they care about credibility within their community, they care about people knowing that they know about beauty and skin care. Right now, our reps have connections to the brand, to us as employees. How can we foster connections between one rep and another, so that they can inspire one another? Because of our small size, we've been able to create truly personal connections between our reps and our employees and with Emily. But how do you keep this going as we scale? Can we push that sense of connection back down to the community itself?

Professional Influencer Marketing Program

A second option was to expand the professional influencer program. Glossier had experimented with influencers during the launch of Cloud Paint. In advance of the Oscars, they hired 10 makeup artists to use the blush product on their celebrity clients and post about it on social media. Glossier also used influencers for the launch of its face powder Wowder, collaborating with 14 prominent YouTubers. Unlike the Cloud Paint campaign, which was clearly labeled as a Glossier “sponsored look” promotion, the Wowder campaign utilized stealth marketing. The YouTubers were not permitted to reveal the brand behind Wowder, but rather directed viewers to a landing page where the tie to Glossier was not revealed but where consumers could leave their email to learn more about the

product.^b The company was contemplating future influencer partnerships. Professional influencers could be paid according to several different types of metrics:

- **Pay per post.** A flat fee could be provided each time an influencer posted branded content. Rates varied widely depending upon popularity; for example, Beyoncé charged \$1 million, Kendall Jenner \$300,000, and Karlie Kloss \$50,000 per post.²⁴ Micro influencers were much less expensive: \$83 per post for an influencer with less than 100,000 followers.²⁵
- **Pay per click.** A fee could be provided each time a customer clicked through to the brand's website from an influencer's content.
- **Pay per view.** A fee could be provided to compensate the influencer based on the size of their audience. A CPM (cost per thousand) rate represented the price of reaching 1,000 followers and could run from \$15–50, with higher rates for top-quality influencers.
- **Pay per sale.** A commission could be provided to influencers when an affiliate link on their content led to a customer order. Commissions ranged from 15–25% in the beauty industry.

Paid Media Spending

The team had also begun experimenting with paid media, including paid social on Facebook, Instagram, Pinterest, and YouTube, paid search, outdoor advertising, and direct mail. The company was spending around 20% of its revenues on marketing (including brand media, sampling, agency fees, and more), which was generating a sizeable amount of its brand impressions; currently 30% were derived from paid media, 20% from peer-to-peer efforts, and 50% from earned media.^c Weiss and Davis were wondering whether or not to increase this percentage by pouring more money into paid media sources.

The average CPM ranged from a low of \$5–\$7 for search ads to \$40–\$50 for print and outdoor. Consumers generally needed 7–9 branded touchpoints before making a purchase. Glossier's customer acquisition cost (CAC) on paid media had been decreasing over time and was currently hovering around \$52.50.^d With an average order size of \$57,^c this was putting pressure on the company to be more efficient. Making it more difficult, the online media environment was heating up. Fretted Weiss, "One thing that made companies that came before us successful is that there wasn't as much competition in the online space. Advertising came cheap, there was less noise and everyone wasn't going after the same demographic. Now, we have a lot more competition." Davis was apprehensive about spending too much, stating,

We don't want to take lots of VC money to put more fuel on the customer acquisition fire. We want to build a forever brand, not a fast-growing rocket ship with no underlying substance or value. We want to be around in 35 years. We're not trading on a growth multiple, we're trading on the fact that we've captured the imagination of a customer. That's our value creation. Anyone can buy customers, not everyone can earn them.

Weiss worried that pouring more money into paid media could lead to diminishing returns.

^b You can view one of the Wowder prelaunch YouTube videos at https://www.youtube.com/watch?v=8t_vzQiR8ec.

^c Note that Glossier's marketing budget as a percentage of revenue and media impression breakdowns have been disguised. As a private company, Glossier does not release these figures publicly.

^d Note that Glossier's customer acquisition cost and average order size have been disguised. As a private company, Glossier does not release these figures publicly.

We could spend double what we're spending each month, but we wouldn't get double the customers. Our efficiency would go down, so maybe we'd get 1.7–1.8 times the customers. The problem with spending more is that you're starting to reach an audience that looks less and less like the audience you already have. The audience we already have is using our brand because they appreciate not just the product, but what our brand stands for. They like being part of our community, they like being part of a brand that speaks their language. The second you go outside of that and try to reach audiences that you have to pay a little bit more to convince them to come in, you run the risk of not being able to retain their engagement. They could transact that one time and then not want anything to do with your brand again. They don't want to be on your email list; they don't want to follow you on social; they don't want to evangelize or recommend your brand.

However, Emily was pleased to see paid media generating buzz and hypothesized that spending money on paid media might create earned media. She noted, "Girls take pictures of themselves with the [outdoor] ads and tag us. Can you imagine that happening with, like, Ford Motors?"²⁶

Customer Loyalty Program

The team was also contemplating a loyalty program, where customers could earn benefits such as discounts, free samples, early access to new products, and invitations to special events. Specialty retailer Sephora, a leader in beauty retailing, successfully used its *Beauty Insider* rewards program to enhance its relationships with customers. The program offered birthday gifts, free beauty classes and makeovers, a private hotline, invitations to events, free products, and free two-day shipping. Explained Weiss, "Thus far, our retention has been completely organic. We have an email program, but no loyalty program, and we haven't spent anything to try to retain customers. We know we need to build something, but what? We want it to be ROI positive, so we want to get it right so that we actually get incremental behavior beyond what people are already exhibiting."

Moving from Digital to Physical

The team was contemplating its next moves regarding distribution. Now that funding had arrived, they were ready to make significant investments. From its digital roots, the company had recently moved to experiment with physical retail. They were also considering technological and community investments. All would require significant capital investment, so tough choices would have to be made.

Retail Showrooms and Pop-Ups

The company's first physical retail space, a small showroom (see **Exhibit 10**), opened in 2016 on the sixth floor of the company's offices in the SoHo neighborhood of Manhattan. With no street level presence and the need to ascend via elevator to the sixth floor, the space was less than ideal for attracting foot traffic. White recalled its opening: "We had a lot of conversation about opening a retail storefront. But, we didn't know how to operate a retail establishment. I pushed very strongly to not do that. I felt like we were biting off more than we could chew and suggested that we do a test environment, which is what the showroom became." She continued:

It was all about building an amazing experience where you would have the opportunity to interact with showroom editors and other members of the Glossier community. So, we built it so that we could facilitate conversation, not just with the people who work there, but other people who are shopping. We wanted to build content

opportunities, so that content could be shared online with people who weren't able to go in person. It was all about bringing Glossier to life. It is like Willy Wonka meets Glossier.

The space was configured to showcase the brand as much as its products. Emily explained,

It provides an opportunity for us to meet our customers and for our customers to try our products, to chat with our showroom editors, and to give us feedback and inspiration. Our goal is to create spaces as Instagrammable as they are functional. Glossier showrooms are more gallery-inspired than inspired by traditional beauty retail. They are places to try new, unique ways for customers to test our products, with clear calls-to-action and irresistible opportunities to create user-generated content. We aim to show not tell. Our voice appears in architectural details to inspire content sharing and smiles. Through lighting, we set customers up for optimal selfies. Our offline retail is highly experiential.

The tiny space performed well, generating sales per square foot higher than a typical Apple Store and a 65% sales conversion rate. Those whose first Glossier purchase occurred in the showroom had higher repeat rates than online-first shoppers. However, to Emily, that was beside the point; she saw the showroom as a gathering space for her community to visit with the brand and with each other. She reflected, "While the sales are through the roof and defy all odds, what's more interesting are the girls who come once a week because they want to feel the energy in the room, and I can't say that about large beauty retailers."²⁷ She mused, "I think a lot about the Apple Store. About creating hubs where you can touch and experience a product, yes, but you can also connect with like-minded people."²⁸ She continued:

We would rather people come and stay than people come buy something and leave. If Glossier can bring together like-minded women and give them space to—yes buy product—but also learn and interact and contribute, I think that's success for us.²⁹ I consider it as a brand marketing channel, not as a sales channel. You're never going to be able to get as many people in the door in a physical location as you are via a digital experience. I see it as allowing consumers to make a pilgrimage. It's a way of deepening engagement.

As the team contemplated opening showrooms in other cities, Weiss pushed back, citing the high costs of establishing a physical footprint.

I don't think the showroom concept is sustainable, if we want to bring in new people and have it be a new touchpoint as well as a reengagement touchpoint. The people who come to our showroom now, they've already figured out the brand. How do we translate that sentiment and feeling of creating community from our digital experience into a retail experience? And then how do you take that access and bring it back to digital? It's much more scalable digitally than it is to have stores in 50 cities.

White agreed, "The idea was to build touchpoints, build credibility, and then move these people online. The end goal is always to build a digital, not a physical community." However, those who first purchased in the showroom showed a proclivity to continue to prefer to shop there; only 30% of showroom shoppers moved to e-commerce for their subsequent purchases.

Glossier also experimented with pop-up retail, its most recent for the launch of its fragrance. A storefront in SoHo was leased for a few weeks. On the scene, *New York Magazine* described it as, "upholstered in undulating waves of red, with a pink curtained ceiling, pink tinted mirrors, and—in a slightly S&M touch—a leather-strap-bound pink pouf. Beautiful young women wearing red pantsuits

make deep eye contact and speak in whispery voices. ‘Welcome,’ says one as she lifts a bell jar, wafting the odor about. ‘Do you like it? All that’s missing is . . . you.’ A hand in a red patent-leather glove holding a jar of perfume emerges from a mirrored closet, spritzes, waves, retreats.”³⁰

Emily explained, “I was really inspired by theater, performance art, and magic shows when concepting the space. Everything about the experience is unique, from the way the customers physically interact with the fragrance to how the editors talk to the customers. We’re excited to be bringing Glossier You to life offline in a totally weird and unexpectedly luxurious way.”³¹ As the team debated executing more pop-ups, Weiss considered, “It was not focused on bringing you in and converting you, getting you to try the product. It was focused on an art-like interactive experience that brought so much dimension to our brand, but was limited to a very small audience. So, we’re trying to find the balance: do you do these types of experiences to try to make your brand stand out or do you do more traditional retail to drive conversion? That’s the capital allocation decision.”

Other Options

The team was also contemplating encouraging consumers to hold themed product parties in their homes, an old-style Tupperware party for the digital age. White explained, “They would throw a party for the Oscars and demonstrate our products at it. We probably wouldn’t let them sell them because we don’t want them to be like salespeople checking you out on their phones. Once you try the product at the party, you would go onto Glossier.com to shop that way.”

Lastly, retailers such as Sephora were inquiring whether Glossier would make its products available via a wholesale model. Sephora, with over 400 retail stores worldwide and a robust e-commerce business fueled by an assortment of over 300 brands, was a leading specialty beauty retailer, a channel that accounted for 22% of the sales of color cosmetics in the U.S. in 2017. By comparison, internet retailing accounted for 13% and department stores 17%, with most of the remainder occurring in mass merchandisers (12%), drugstores (18%), and grocery (7%).³² Said White, “Sephora would love to have Glossier in their stores. We would 10-fold our revenue, like overnight, but we’d have to give away massive amounts of margin, potentially as much as 40–50%.”

She admitted, “It’s harder to reach customers on our own, rather than to just go to where they’re already shopping. It would be easier to make the sale. The people that we sell to went through a ton of effort to find us and buy from us. That’s a lot to ask of a busy consumer who has so many other choices.” As she considered the wholesaling option, Emily mused, “All of the other direct-to-consumer brands who only sell via e-commerce tend to cap out in terms of customer acquisition at a certain point. So, they do a partnership with Target. At some point, you realize that you can’t be a contained ecosystem any longer. You need to reach tentacles out. But I don’t necessarily believe that has to be true. The glass ceiling for DTC brands just represents the diminishing marginal returns of acquiring customers online. But, we think that’s a paradigm of e-commerce that doesn’t need to exist. How can we break past this inflection point without leaving our own ecosystem?”

A New Kind of Social Commerce?

Emily dreamed of making Glossier fully “vertically integrated,” using the term to denote not a self-contained supply-side value chain, but rather a self-contained demand-side value chain that reunited the processes of discovery, purchase, and fulfillment. She envisioned creating relationships among people through *Into The Gloss*, learning about their needs, translating those desires into products, and creating an end-to-end discovery-to-purchase-to-fulfillment-to-consumption-to-sharing process that enchanted and inspired consumers to connect closely with the brand and each other. She explained,

E-commerce has killed shopping. It's made buying incredibly easy. It's made fulfillment an afterthought. But, it's stifled discovery, which is half of a great shopping experience. So now, consumers have a bifurcated shopping experience. Fulfillment is owned by e-commerce, Amazon, Sephora, etc. And discovery has become the central theme of social media; that's where you actually discover stuff. How can we bring that back together, because there's something really magical about shopping and I think it's kind of dying. What we have to do is to build an incredible digital experience so that maybe you don't need a physical brand interaction. We want to create a digital party – the equivalent of a party that has a line down the block to get in and people are talking about it as a great party, not one that you have to pay celebrities to go to. Right now, an e-commerce website is really just a party that you have to pay people to go to. We want to build a shopping experience that is so great that people just naturally flock to it.

Echoed Davis,

Social commerce is a bit of a buzzword and I don't think that's what we're thinking about. But rather, how do you help people discover products in the way that they naturally want to – by talking to others? But, e-commerce sites today are about driving to purchase – everything is designed to eliminate any friction that reduces conversion. So, how do you balance shopping with social? We think the answer is "You don't." The shopping should be irrelevant. It's something that falls out of the bottom, it's not something we should focus on or design for. If you accept the premise that it's not about selling stuff, then all of a sudden, all bets are off the table. 99.99% of e-commerce sites fundamentally look the same, flow the same way. Ours doesn't have to.

We question why no one is using the channel as the value proposition in and of itself. By engaging people at scale online, what can you offer them that offline retailers can't and traditional e-commerce platforms can't? This isn't about getting you stuff cheaper or more conveniently. This is about the experience. How do we offer you an experience that is different, that makes you feel special, and makes you feel a part of something? How do we create a different kind of loyalty? By bringing people together online, you can create experiences that haven't previously existed before. We're the antidote to Amazon. The more convenient and quick Amazon is, the more special and unique the online experience we offer is going to have to be. Our competitive foil isn't Clinique or MAC. It's Amazon. They're the commoditization of brands and products. We're the exact opposite.

Mahoney was on-board and pushing for digital rather than physical retailing investments. He noted, "People think of Glossier as a beauty company, but we're also a technology company. We have almost 50 people in the tech department, so a third of the company is in technology. We built our entire platform ourselves, unlike many other DTC companies who just use an off-the-shelf software. That enables us to do things with our platform that others can't do – to grow beyond the platform. That's the piece that's going to let us do what hasn't necessarily been done before." He continued,

Emily has this vision for a new way of connecting customers; she's reimagining the channel. She wants us to build a new shopping paradigm to fundamentally change the way people shop online. How can we connect you to someone who has similar interests, to help you or just share your shopping experience? How can we allow you to harness our community to enrich your shopping experience? We want you to come to Glossier.com, go through product discovery, check out, and be completely surprised by what happened along the way. You didn't expect to interact with people in the way that you did, but not only do you feel good about your purchase, you feel good about having

contributed to the conversation, to the community, and you're eager to share with others what just happened and just as eager to go back yourself, even if you just return to enrich someone else's buying experience.

Emily has a belief that you can combine an online community with an e-commerce platform. She believes that people will want to hang out on Glossier.com just like they do on *Into The Gloss* — that it won't just be about shopping. No one else is creating a space like this — where you'll interact with a community one day and then the next day you'll go back and shop. The one thing we've always done well since our first days is that we create wonderful content. We are great editors. That's our competitive advantage. A lot of e-commerce companies built their commerce platform first and then figured out that they needed content to drive consumers to it. We came to commerce the other way around. We were content editors first before we went into commerce. That matters.

Capital Allocation Decisions

As the team prepared their marketing strategy recommendations to discuss with Emily, they laughed that sometimes things seemed easier when money was scarce, because then there were fewer strategic options on the table. How should Glossier spend the \$52 million it had just raised? The money could be used to develop a more sophisticated R&D organization that was less reliant on consumer input. Or, it could be used to launch a sales representative program or a professional influencer marketing program. And, investors certainly wouldn't be surprised to see the company invest it in paid media. It could go a long way toward opening new showrooms, hosting more pop-ups, encouraging at-home peer-to-peer selling, or moving into Sephora. Or, it could fund a reimagination of social e-commerce. But, it couldn't do it all and the team needed to focus on strategies to best achieve Glossier's short- and long-term goals. Emily's recent musing inspired them as they debated the options:

I've spent my life relying on light bulb moments and just jumping in full force. That's fine when you're making something on your own, but not fine when you're 150-plus people and there are a ton of stakeholders, as well as knock-on effects of pretty much every initiative we take on . . . I'm learning to assess before deciding, and just be a bit more thoughtful about goals and consequences when it comes to making decisions. As a startup, we are moving at lightning speed and there are a lot of interesting options for us — lots of great opportunities . . . and right now, it's so important to have focus.³³

Exhibit 1 *Into The Gloss* “Top Shelf” Features

Source: Company documents.

Exhibit 2 Example of Consumer-Generated “Top Shelfies”

Joelle Hyman's Top Shelfie as seen on ITG.



Cecilia Gorgon's Top Shelfie as seen on ITG.



Source: Company documents.

Exhibit 3 Excerpts from Emily Weiss's *Into The Gloss* Blog Post Announcing Glossier's Launch

There's so much pressure to edit oneself to a T, to flesh out who you are and then attempt to capture exactly who that is on an iPhone camera, in 140 characters, or in a series of emoji's and clever hashtags. The problem with this depiction of your 'real life' is, of course, that it's not very real at all. It's how you want to appear to the world. It's nearly impossible to show what's real because your actual identity is a moving target. Or, at least, I think it should be.

Freedom and confidence are two different things, in my book. Confidence is overrated — it can be faked, whereas freedom is fearlessness. Freedom is being more or less okay with wherever you're at, at any given point in your life or your day or your hour, be it really sucky or really great or somewhere in between (and there are a *lot* of in-betweens.) The single guiding principle that I try to follow, assuming blindly that the rest will fall into place, is to operate squarely in the present. I think it's one of the most difficult things for anyone to do. Glossier is a celebration of that freedom.

People say that truth sets you free. I think that having fun sets you free. Laughing at your own jokes, getting nostalgic over something you liked in high school, and generally channeling your inner nerd is fun. Geeking out over a beauty product is fun. What I don't think is fun is editing yourself, aspiring to finally *arrive* at some idea or picture of perfect, untouchable 'glamour?' 'defining your style' or racking your brain trying to decide the 'right time' to do something. For the most part, there will never be a right time. Just go for it.

Glossier is about living in — and embracing — the now, not the past, and not the future. It's about fun and freedom and being OK with yourself today. It's about being nice to people and knowing that a smile begets a smile. Snobby isn't cool, happy is cool.

Our credo is to follow our gut and rethink products, creating exactly the items that we want to see. Who are we? We are you, listening to everyone, absorbing all of this information over the years, and trying to get at the core of what beauty is — and needs — in 2014. Glossier begins with YOU, which is why our first products are all about letting your personality shine through . . . glowy, dewy skin.

We're laying the foundation for a beauty movement: one that celebrates real girls, in real life. . . . It is the beginning, I hope, of a new way of looking at beauty.

Source: Company documents.

Exhibit 4 Eight Companies Dominate the Global Beauty Market



Source: "8 Companies that Own the Beauty Aisle," CB Insights, <https://www.cbinsights.com/research/top-beauty-brands/>, accessed 07/31/2018.

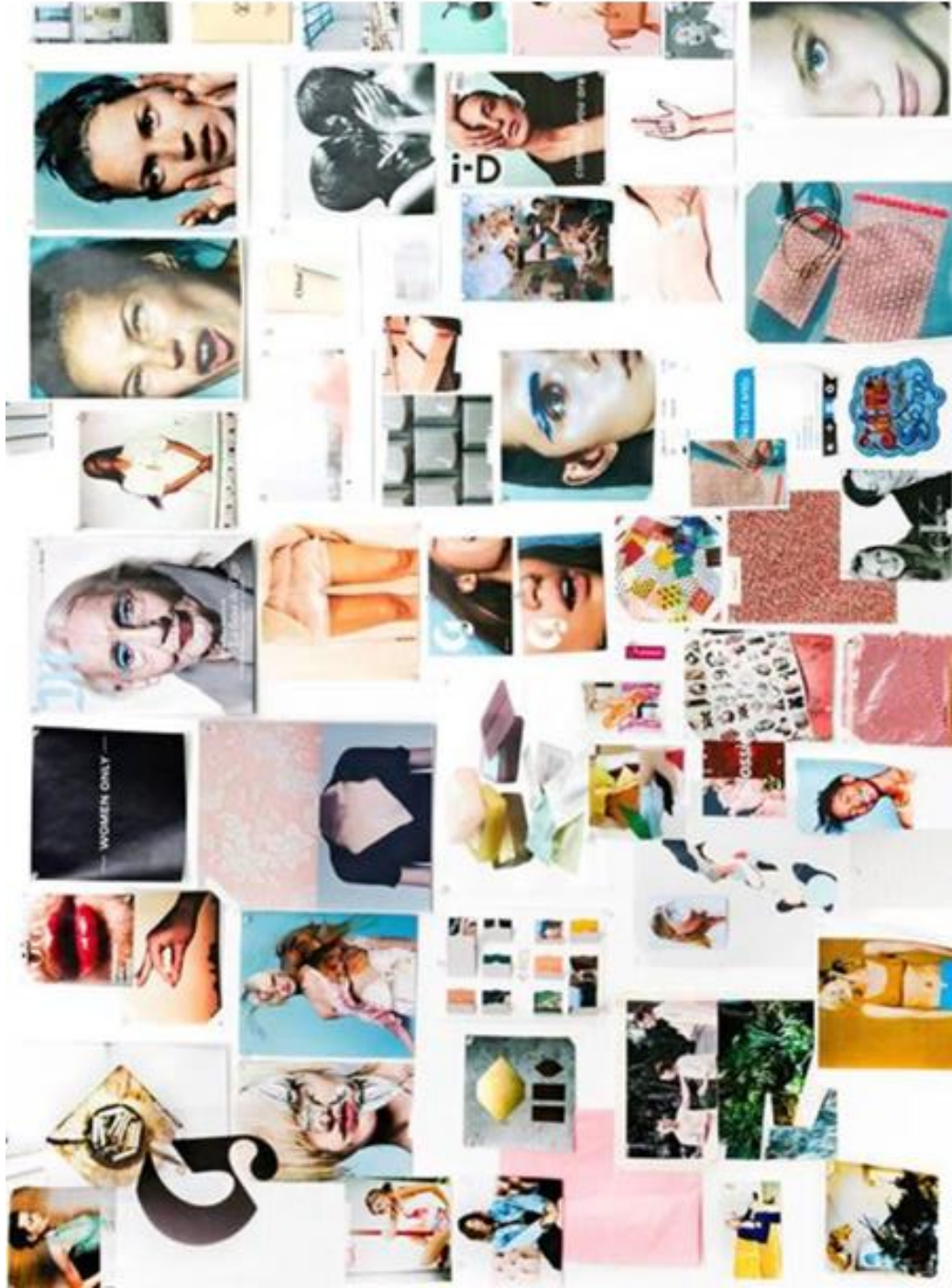
Exhibit 5 Glossier's Product Line

Product	Description	Price Point
Skin Care:		
Milky Jelly Cleanser	Conditioning face wash	\$18
Priming Moisturizer	Buildable hydrating crème	\$22
Balm Dotcom	Universal skin salve	\$12
Solution	Exfoliating skin perfector	\$24
Soothing Face Mist	Rosewater spray	\$15
Priming Moisturizer Rich	Luxurious face cream	\$35
Invisible Shield	Daily sunscreen +	\$25
Mega Greens Galaxy Pack	Detoxifying mask	\$22
Moisturizing Moon Mask	Soothing treatment	\$22
Super Pure	Niacinamide serum	\$28
Super Bounce	Hyaluronic acid serum	\$28
Super Glow	Vitamin C serum	\$28
Makeup:		
Lash Slick	Film form mascara	\$16
Lidstar	Glistening eye glow	\$18
Cloud Paint	Seamless cheek color	\$18
Boy Brow	Grooming pomade	\$16
Generation G	Sheer matte lipstick	\$18
Stretch Concealer	Flexible coverage	\$18
Perfecting Skin Tint	Sheer skin enhancer	\$26
Haloscope	Dew effect highlighter	\$22
Lip Gloss	Crystal clear shine	\$14
Wowder	Finishing powder	\$22
Body:		
Body Hero Daily Oil Wash	Oil-froth body wash	\$18
Body Hero Daily Perfecting Cream	Glowy, dewy hydration	\$22
Fragrance:		
Glossier You Perfume Solid	Fragrance compact	\$22
Glossier You	Eau de parfum	\$60

Source: Casewriter, compiled from information in company documents.

Note: Glossier also sold kits that contained multiple types of products. For example, the *Glossier Phase 1 Set* contained three daily skin essentials – Milky Jelly Cleanser, Priming Moisturizer, and Balm Dotcom – for \$40.

Exhibit 6 The Original Glossier Brand Inspiration Mood Board



Source: Company documents.

Exhibit 7 Behind the Glossier Mission and Core Values

Our Mission To give voice to beauty.

Our Core Values

Inclusive

Inclusivity is our number one value. We proactively seek diverse opinions and perspectives, we're collaborative, we're open to discourse (and understand that the best idea in the room may not be our own), and we take time to give context and bring people into the conversation.

Devoted to the Customer

We always ask, "What's best for the customer?" And we do that. We think of ourselves as "hosts" and our customers as "guests," and we strive to create experiences for customers that go above and beyond to excite and delight them.

Courageous

We have conviction in our ideas and we vocalize them. We disagree in the moment, and assume ownership and accountability. We're honest and straightforward—with ourselves, and with our colleagues. And we know that communicating in a clear, concise, and honest way is critical to getting the important work that we need to get done, done.

Curious

We have a growth-mindset—we know that there's always room to learn more, be better, and grow. We know how and when to ask for help, and we're resourceful. We don't wait for answers and solutions to appear, we find them. We also seek outside information. Whether it's reading to deepen our knowledge base or stay on top of our field, finding events to attend, or connecting with peers at other companies, we look beyond the four walls of Glossier.

Discerning

We have good judgment. We think in a holistic, 360-degree way. We are thoughtful about the cross-team, internal, and customer implications of ideas and actions. We are good at prioritizing what to do, when, and with whom. We don't just think of Day 1, we think of Day 365 of an idea, hire, project, or launch.

Source: Company documents.

Exhibit 8 Glossier's Packaging

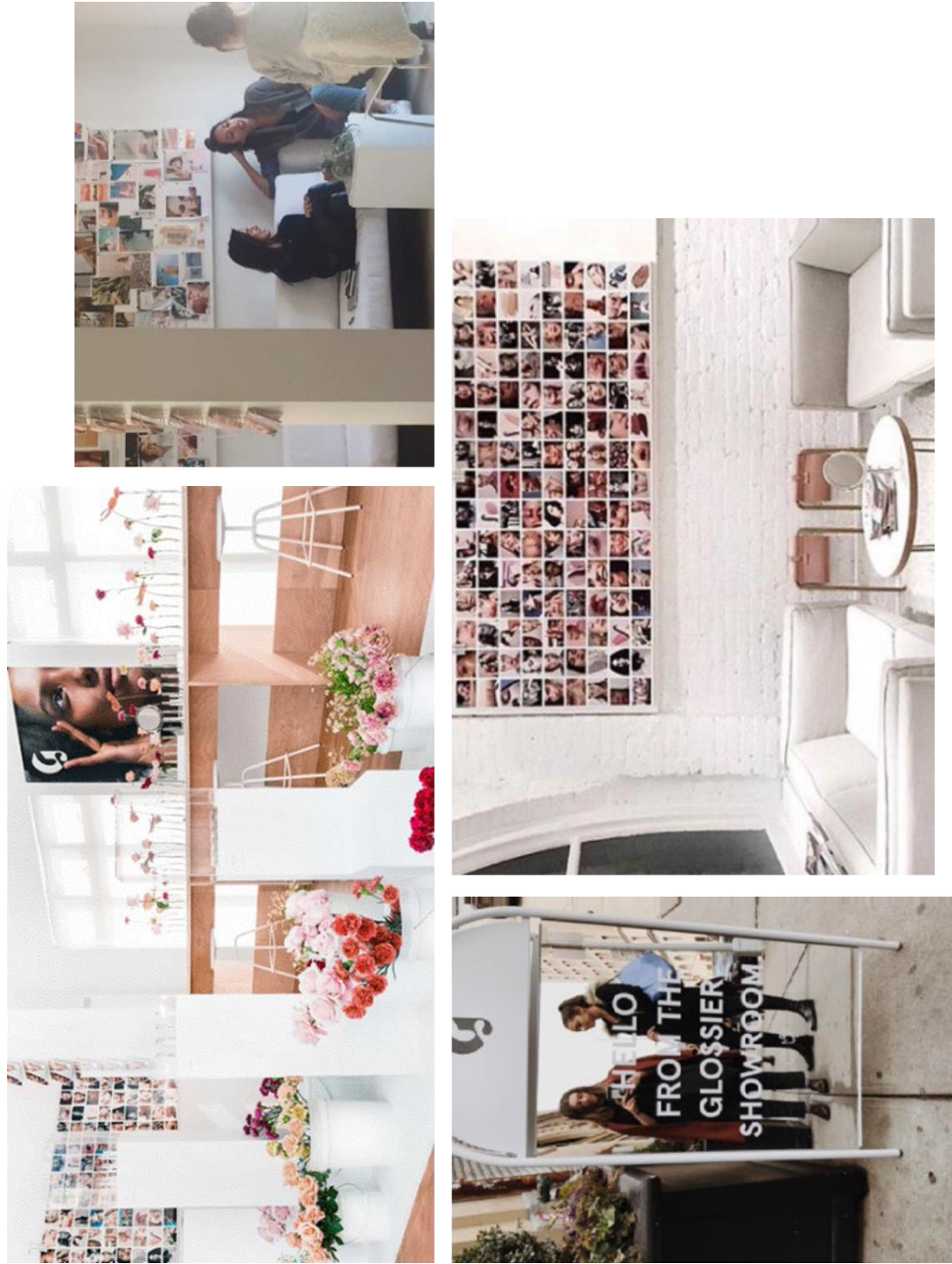
Source: Company documents.

Exhibit 9 Customers' Instagram Posts Tagged with #Glossier



Source: Company documents compiled from consumers' Instagram posts tagged with #glossier.

Exhibit 10 The Glossier Showroom



Source: Company documents.

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