
INFLUENCER CULTURE AND ITS IMPACT ON THE FACE OF MARKETS

A Descriptive Analysis

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Abstract

The beauty and hair care industry is always changing. It seems to be on the cutting edge of every social movement as it ties strongly into what our identity is and how we can express that identity. Using Lorraine Massey's Curly Girl Method (CGM) as an example of the impact social media has over shaping the face of an entire market, this analysis will study the rise of natural hair in curly-haired consumers, the required care that this demographic is demanding, and show how the inclusion of more than just straight-hair hair care is essential for brands to stay relevant in today's changing market. Massey's methods are based solely on her personal preference of hair care and involve mainly forgoing silicones, sulfates, parabens, and heat on curly hair. By using Not Your Mother's Curl Talk line this study will aim to show how NYM consumer's needs and wants for "CGM" approved products outweighed their chemist's knowledge and expertise in making industry-standard hair care products. The findings of this study suggest that adding in curl care that follows the needs of the Curly-Hair community increase sales and engagement, but more importantly, these findings shed light on a shifting market driven by influencer culture and the importance of understanding, as a brand, how to react to this change.

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Introduction

No more than 5 years ago if one looked on the back of a popular hair care product they would find a list of ingredients ending in “-ate,” “-cone,” or “-paraben,” not to mention alcohols, dyes, and waxes completing the formula. These practices have become increasingly unacceptable for the Curly Hair community, so much so that up until a few years ago it seemed the only brands that met these consumer’s needs were prestige brands that were hard to find and cost far more than anything you could find at major United States retailers.

The phenomena of what today’s curly-haired girl wants can be traced back to the teachings of one hair stylist and her start at a salon that she co-founded back in 1994. Even though these methods did not take off until 2016, that is the origin point of what would ultimately fuel an entire cultural trend, and the phenomenon is that it is not really based on any “factual evidence,” just simply one woman’s routine that turned into a “pretty good” way to care for curly hair.

This study aims to analyze the success and influence of one woman over an entire group of people that share curly hair characteristics and prove the importance of always diversifying and expanding a brand in a changing market. These findings will be supported by using sales data and key point indicators for social engagement from a national hair care brand, Not Your Mother’s Hair Care.

Background

Hair Care Industry

In the global market, the hair care industry currently makes up 90 billion US dollars' worth of market size and is set to grow to 102.28 billion USD by 2024 (M. Shahbandeh, 2018).

Fifteen billion of that total market is revenue for the United States. This in turn makes the U.S. the most lucrative hair care market out of any country in the world despite it not being the largest (Duncan, 2018).

The largest segment within this market is shampoo, which is expected to grow by almost 6 million USD by 2023. This segment is also a suitable example of a diversified range of products based on the ingredient label. Unlike hair-styler categories, whose main focus is on styling benefits, shampoo's benefits and desirability range from ingredient quality and chemical makeup rather than unique styling aspect. Shampoo and conditioner can be much harder to differentiate and usually comes down to brand loyalty.

Within the shampoo segment, the main products offered fall into the category of botanical and herbal, vitamin/ mineral fortified, and moisturizing- all in line with the trend that personal care should be more natural and organic. That trend is what the industry is seeing its consumers follow more closely (Market Research Future, 2018).

While ingredient-based products play a huge role in the consumer's want of a hair care product, the type of hair the product is marketed to care for impacts the consumer's purchasing decision as well. As is highly noticeable when one walks into the hair care aisle, there is not just one shampoo and conditioner set with synthetic ingredients and one shampoo and conditioner set with organic ingredients. There is hair care for every hair type genetically

possible. When the amount of hair care product choices is coupled with the overwhelming amount of social awareness being drawn to wearing hair as natural as possible, the market for “curly hair care” appears to be more relevant, and open for innovation, than ever before.

In fact, according to medical researcher Sarah Medland, the structure of hair variation in those of European ancestry show about 55% of people to have wavy to curly hair. This means more than half of those with this ancestry alone display curly hair characteristics, not even factoring in the rest of the population of the USA (Medland, 2009).

According to the Census, those of European decent make up roughly 1% of the entire United States’ population, we see how this shift in focus towards naturally curly hair care is not just a phase but rather a necessity for the large amount of people who are dealing with these genetics (World Population Review, 2019).

However, the phenomenon that this paper really aims to capture is not the rise of the “Curly Girl,” in a biological sense, but rather in a business sense. The shift in the hair care industry to produce organic and naturally derived products comes out of the demand the “Curly Girls” set in place. It is not as if all of a sudden, the United States has become inundated with curly haired people. So, what exactly happened to bring awareness to curl care, and what happened to make organic the most desirable way to care for curls? The answer is simple, influencer marketing and a very small amount of scientific facts to back up one woman’s hair care routine.

Curly Girl Method & the Rise of “-Free” Products

The desire for more organic curl care, specifically those brands that offer sulfate, silicone, and paraben-free options, can be traced back to one woman’s routine. Lorraine Massey started growing her following in 1994 with the start of a brand called DevaChan salons in New York City. She started as a salon that specialized in curly-hair haircuts (the DevaCut). However, in 2002 she helped to co-launch their first product in a sister brand, DevaCurl.

DevaCurl called out its sulfate-free differentiation in the shampoo market as its main unique selling point. By 2007 DevaCurl had their own academy where they trained stylists in the art of caring and cutting curly hair. They are expanding to this day to locations across the United States, and remain a sulfate, silicone, and paraben-free brand (DevaCurl, 2019).

During the rise of DevaCurl salons, Lorraine Massey released a curl care book titled *Curly Girl the Handbook*. With the first edition being published in 2001 and the most recent edition having been published in 2011, *Curly Girl the Handbook* has sold more than 20,000 copies every year it has been in circulation¹ (TCK Publishing, 2019).

Sharing the method to loyal followers of her DevaChan salons, as well as those who looked to her outside of curl haircuts, her method has gained a cult following that has snowballed into the influential movement of the “Curly Girl Method.”

It was in her publication that she shared her curl care tips of avoiding shampoo that contains sulfates, heat, combs & brushes, fragrance, non-water-soluble silicones, and drying

¹ TCK Publishing has software that accurately estimates how many copies are being sold on Amazon with less than a 6% error rate. This number is only an estimation, but from credible prediction software.

alcohols. She instead says that the proper methods of curl care involve gentle cleansing ingredients, emollients (shea butter, oils, etc.) proteins, and moisturizers.

The reasoning for this philosophy, according to Massey, is that sulfates, found in most shampoos, strip the hair of natural oils that help to protect the hair. In an attempt to cleanse the hair, sulfates dry out the hair's natural ability to strengthen itself.

Silicones, which are found in most conditioners, create an unnaturally "plastic-like" tube around the hair follicle. This causes a buildup that ultimately weighs curls down and cannot be rid of without the help of a sulfate to break it down. In curly hair, this repeated combination can change the curl pattern and cause frizz and less curl retention, two things that people who are trying to wear their hair naturally curly would not want in order to keep volume and their individual curl pattern intact.

The science behind Massey's method is technically correct, however, according to Lush, a leading personal care brand, there is nothing fundamentally wrong with sulfates. Their information section on their site says, "sulfates are effective and safe when used as directed. [They have the potential to leave hair and skin feeling dry, but if you are happily using products formulated with sulfates, there's no reason you shouldn't continue using them,] (Lush, 2019)."

Furthermore, hair care blog, *Max My Looks*, says silicones are indeed synthetic ingredients, however when used in hair care products help to create an extra layer over the hair shaft that can help with heat protection and added protection from the elements. They are non-toxic and can easily be washed out with a cleansing shampoo (Max My Looks, 2018).

With both of those positions on those two hair care ingredients being open to interpretation of how the user would like to care for their hair, it is still a wonder how this cult

following for Massey's curl care has become the set routine that curly girls must follow in order to maintain their curls.

The influence that Massey has had has surpassed tips and recommendations. It seems as though women use Massey's Curly Girl Handbook as a lifestyle. According to people who have purchased her handbook, they say that it is very "educational," and helps readers to "understand" their natural hair. One review by Valerie H. said, "this book is the curly girl's dream. It not only tells us how to take care of it, it assures us that curly hair is a good thing, (H., 2018).

Massey has created a community of men and women who feel like they are not alone with their natural hair care. That community is something that makes the validity and science of her practices irrelevant. At that point her influence surpasses whether the method is truly the best overall for curly hair. It goes into the creation of a safe space for her followers to bond over a shared interest and lifestyle. That space is what gives the credentials to an otherwise very "open-for-interpretation" curl care routine.

Biggest Brands in the Market

To deviate from Massey's curl care, it is important to go next into what the market is currently in the realm of hair care. While the focus of this paper is on how the Curly Girl Method gained traction, that cannot be analyzed without understanding products that have been introduced into other hair care brand's product lineups after Massey's introduction of sulfate-free and silicone-free routines.

Some of the biggest hair care brands in the U.S. industry are L'Oreal Paris, Garnier, Dove, Matrix, Pantene, Neutrogena, Redken, Head & Shoulders, and Tresemme. Two

thirds of these (L’Oreal Paris, Garnier, Matrix, Pantene, Redken, and Treseemme) have incorporated silicone and sulfate free products into their hair care lines within the past 5-7 years. The three that haven’t (Dove, Neutrogena, and Head & Shoulders) are not brands that would need to make this shift to survive in the changing market considering their diverse product line up and uses² (Rosen, 2015).

All of these brands still have silicone and sulfate filled products for sale, but the shift to call out their “-free” options puts the more organic lines as the number one search results when applicable. In fact, on L’Oreal’s website when “Silicone Free” is searched the first result that comes up is a recent article showcasing their new products with information on how to make the switch to a “-free” hair care routine, however the routine is not tied to caring for naturally curly hair. Rather the routine talks about hair care in general and the overall benefits switching to these products can have on your hair no matter how it naturally presents itself (L’Oreal Paris, 2019).

This lack of call to curly girls could be that L’Oreal knows their target demographic is not the curly girl. However, this highlight of the organic trend is a prime example of how the shift in the market started by curly hair care is impacting all hair types. These methods have penetrated the market in more than one hair type routine, and in more than one brand. These brands mentioned above do not reflect the biggest competitors in the curl care community, yet they are still finding the importance of introducing these curl care innovations into traditionally straight hair care products.

² Dove is primarily body care, Neutrogena is mainly skin care, and Head & Shoulders is marketed a dandruff clarifying shampoo which means sulfates are a must in their formulation

Biggest Curl Brands in the Market

In cult favorite curly hair care brands such as Kinky-Curly, Rizzo's Curls, and Cantu, the creation of "-free" lines can be found. It is hard to see a defined shift from less organic ingredients to a more natural formula, as they have had their finger on the pulse of what the curly girl wants alongside DevaCurl³. However, we can see how the desired marketable callouts have changed to let their customer know this product is made with their hair type and desired routine in mind.

Seeing the implementation of curl care methods major hair care market share holders and curl-care specific brands barely scratch the surface of the impact the introduction of sulfate and silicone free routine has had in the industry. In general, boutique-type hair care brands⁴, such as Aussie, Maui Moisture, and Not Your Mother's Hair Care, have shifted towards catering to the curly community with sulfate, silicone, and paraben free products.

Aussie started back in 1980 with their Miracle Moisture (containing silicones), and has since released lines that do not contain silicones, however, they still have their original lines, They have adopted a more natural-style in their most recent rebranding, such as highlighting their organic ingredients and the usage of fonts that are more tropical, however their ingredients still remain fairly non-curly girl method friendly (Aussie, 2019).

Maui Moisture, a subsidiary of Vouge International, was created as a solution to the lack of an organic brand for the company. They found success and cornered the market quickly as an affordable drug store product for curly hair with the call outs of "-free" formulations,

³ Massey's hair care brand

⁴ Not the biggest brands in the market, but still nationally known with large followings

however it is important to note that they were not started as such. They simply entered the market during the time more natural ingredients were gaining traction. They were able to cater to that demographic as a way to get the type of products curly haired consumers were being influenced to use (Maui Moisture, 2018).

Lastly, Not Your Mother's Hair Care is a prime example, and one that will be used from here on out as a main point of reference when diving into the relation between influencer culture and the implementation of Massey's Curly Girl Method. NYM will be used as a specific case study to show how the impact of adding curl care products into a product mix was a necessity to keeping a stake in the curly girl market.

While the shift is gradual in the above mentioned brands, and while there is still offerings of sulfate, silicone, and paraben-filled products in most of the above-mentioned brands, it is hard to conclude that this organic callout and sulfate, silicone, and paraben free formulations came as a natural progression rather than a means to keep up with the trends of the current market.

As we will discuss further, alongside Not Your Mother's introduction of curly hair care, all these brands have also capitalized on influencer culture to help promote their curl care products, and in some cases have become more well known as "curl care brands" than curl care specific companies. For now, let's look at a more detailed explanation of how influencer culture has impacted the face of the hair care market and NYM as a brand.

Influencer Culture

Social media as a means to deliver targeted messaging to a specific demographic is the new normal for advertisers. According to the *International Journal of Business and*

Management, one of the most important features of social media is its ability to, “communicate directly to your brand representative or about your brand with [them and] with their friends, (Vinerean, Cetina, Dumitrescu, & Tichindelean, 2013).”

Studies have shown that roughly 40% of respondents say they let influencers that they follow on Instagram, Twitter, Vine, or YouTube impact their purchasing choices, and according to Jeffrey Graham, Twitter’s director of market research, “stardom” is not what is important in influencer marketing, but rather the quality, trust, and knowledge of the community the influencer creates (Oppenheim, 2016).

While we know influencer culture as social media, it is important to note that influencers can come from anywhere. Influencer Marketing Hub defines an influencer as “an individual who has the power to affect purchasing decisions of others because of his/her authority, position, or relationship with the audience,” (Marketing Influencer Hub, 2019).

Lorraine Massey, as an influencer, used all three of the above characteristics to gather her influence in the professional sense of hair care, however, in creating the movement of the Curly Girl Method towards to public the gravity of social media played a big part in the awareness of her methods.

Hair Types

Within the influencer culture, there must be trust as well as common ground between the influencer and the followers. Looking beyond social media as a form of marketing Massey's products and methods, it has also been an invaluable tool in sharing the movement of natural hair and empowerment among sharing how one wears their natural hair.

One of the main common grounds in the curly girl community is hair type. See the images below for insight into the different hair types. These graphics also help to understand how in detail this movement has been embraced and constructed as a part of daily routines.



Source: Illustrated by Maria Asare Boadi

Millions of people on Instagram alone are looking at information like the illustrations above. They are choosing influencers they trust the most as a means to get information about how to care for their hair type. The only difference between the early 2000's when Massey's *Curly Girl the Handbook* was released and now is that a girl with style 3, medium coil hair who has never cared for her curls before is going to look at an influencer on Instagram as opposed to picking up a book.

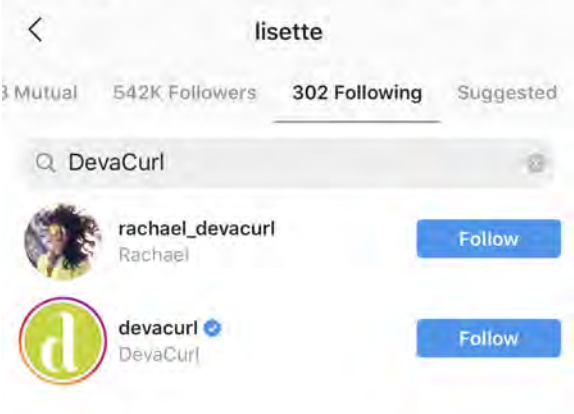
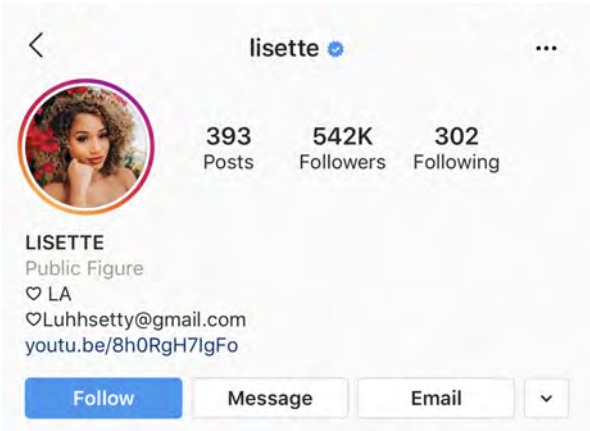
Thinking of influencer marketing as a means of informing consumers over selling to them puts it in perspective of how influential someone with a few thousand followers can be.

Massey shared her hair care routine in the early 2000's, continued to grow her brand and market herself as an authority in the curly hair care community, and continued to grow her community outwards. By 2015 is was defining the hair care market.

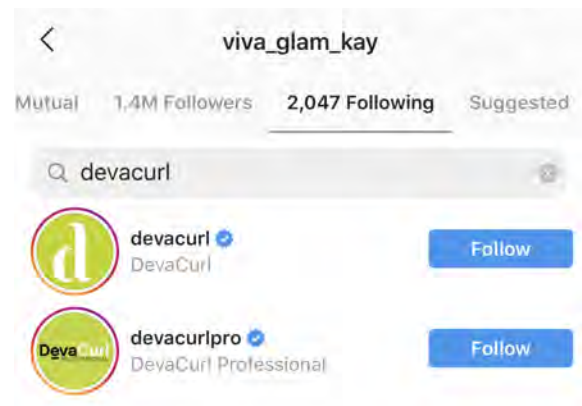
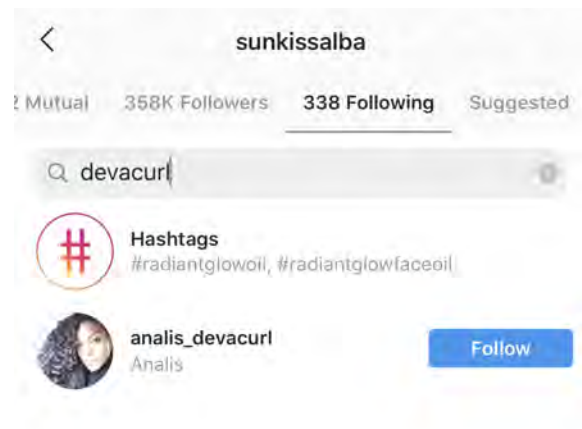
Massey and Her Following

Massey continued growing and spreading her message through DevaCurl, which has over 600,000 followers on Instagram, and as a brand has enlisted influencers such as @sophiacuerquis (34,600+ followers), @indiabatson (63,000+ followers), and @hif3licia (266,000+ followers). All these influencers have curly girl followings and share tips on how to care for curly hair while promoting DevaCurl and the brand's methods of avoiding sulfates, silicones, and parabens.

The interesting part about the above-mentioned influencers is that none of them follow Lorraine Massey, let alone DevaCurl. Another look was taken at three different curly girl influencers, one that was featured on DevaCurl's page, one that gets a DevaCut⁵ regularly, and another that believes in cleaner ingredients such as sulfate, silicone, and paraben free without distinct ties to DevaCurl. Photos with the findings are shown below.



⁵ The patented curl cut from Massey's hair salons



Source: Instagram

As we can see, the DevaCurl method and practices that these girls follow are showed through varying degrees of support for the original brand. Unlike the first three mentioned, these three all show support for DevaCurl through following the stylists, at least, however only two out of six actually follow the brand, and it is still a zero out of six for giving a follow to Massey herself, the creator of the brand and methods that these girls are now promoting to their followers.

The three above mentioned influencers have a combined following of 2.3M+ people and are sharing Massey's methods with these followers without even having social media ties to her. This dissemination of hair care information through people with such large followings in a

social environment where women (and men) are being encouraged to wear their hair naturally is precisely what makes this particular case study so intriguing to those in digital marketing. It makes it even more important that the original method creator is not even part of the now influencer equation.

Not Your Mother's Hair Care

Not Your Mother's launched their curl care line called Curl Talk in July 2018. More than one year later and these products continue to outperform in social and sales as compared to other launches. As more detail is gone into in regards to NYM and their sales it is important to note that the researcher works for the company. Through doing so, they are able to use the backend of the company's research and development, social media analysis tools, and sales data to draw the connection between the introduction of the line and its success it has had in continuing to hold onto a piece of the Curly Girl market.

Launch of brand

Not Your Mother's was launched in 2010 with 6 products. Those 6 original products were *She's A Tease Hairspray*, *All Eyes On Me Hairspray*, *Beach Babe Sea Salt Spray*, *Beat the Heat Hair Protector*, *Kinky Moves Curl Defining Cream*⁶, and *Smooth Moves Frizz Control Cream*.

These products all catered to the traditional straight hair popularized in 2010. It was not but 8 years later that the market shifted to cleaner ingredients with a more focus on natural hair that NYM knew they needed to come up with a solution that met the demands of all their customers.

⁶ Kinky Moves was NYM's original curly girl product, however its ingredients contain primarily silicones and parabens which became an issue shortly before the release of the Curl Talk collection.

Launch of Curl Talk

The Curl Talk line was released July 2018. A little over a year later and its sales accounts for about 35% of Not Your Mother's total sales (including Not Your Mother's Naturals⁷) in Ulta alone. Considering there are roughly 80 SKUs between original line and Naturals line that NYM sells at Ulta, for Curl Talk to account for almost 35% of all sales from the store is very significant (NYM Sales Data, 2019).

This line launched out of necessity for a growing demand of organic and "Curly Girl Method" approved items. The 6 original SKUs that NYM produced were all hair stylers that were targeted towards the prominent hair group of the earlier 2000's. In the pictures show below, pulled from a blog written under the title, *The Best Celebrity Hairstyles of 2010*, we can see that the target demographic was not women wanting to wear their hair naturally curly, but rather women who heat styled regularly with product applied to tame frizz and keep a uniform curl in an otherwise straight hair or naturally curly hair style.



Source: The Skin Care Edit, 2010

⁷ NYM's solution to a 98% organically derived brand; many curly girls enjoy the curl defining line and NYMN is silicone, sulfate, and paraben free as well.

CGM Community and Not Your Mother's

With the SKUs of Not Your Mother's products catering to the above pictured hair types there is a clear gap in what today's market needs. After Lorraine Massey and the widespread following her methods gained, Not Your Mother's decided that in order to stay relevant in the changing markets they needed to introduce a collection that met the needs of their changing customer (NYM Research and Development Team, 2019).

Not Your Mother's original line did contain *Kinky Moves Curl Defining Hair Cream* for their curly hair customers, however it did not meet the needs of the present curly girl following. The product's ingredients contained sulfates, silicones, and parabens. The consumer read this product as an overall inorganic product with "harmful," unnatural ingredients.

As the issue of these ingredients became more prominent, the conversation in house shifted to the use of the Curly Girl Method in their newest launch, Curl Talk. As research and development put it, "multicultural consumers use more styling product and maintain involved, multi-product hair care regimens than ever before."

Not only were segmentation behavior changes noticed, but growth potential was noticed as well. According to the company's research, this multicultural segment had a 26% expected growth rate between 2015-2020, and was projected to soon be the largest segment in the hair care industry (NYM In-House Research, 2018).

The figure below is a screen shot from the first "teaser photo" posted one day before the reveal of the product:

One even calls out an influencer, Penny Tovar (@itscurlypenny), that worked with NYM brands to promote the product launch at that time. She is a follower of the Curly Girl Method with a current 148K follower count. The user asks if the products are CG friendly and how Penny likes them.

Instagram scheduling tool, Later, says that Instagram comments are a great tactic to attract attention to brands and grow an account (Matt, 2018). This relationship and trust between user and promoter on the brand's page is a very common occurrence. It is one that is often used as a benchmark for types of engagement on a brand's page. These comments and influencers talking on brand's IG pages are how the Curly Girl Method gained a foot hold and spread in the first place.

Reformulation of Curl Talk Mousse

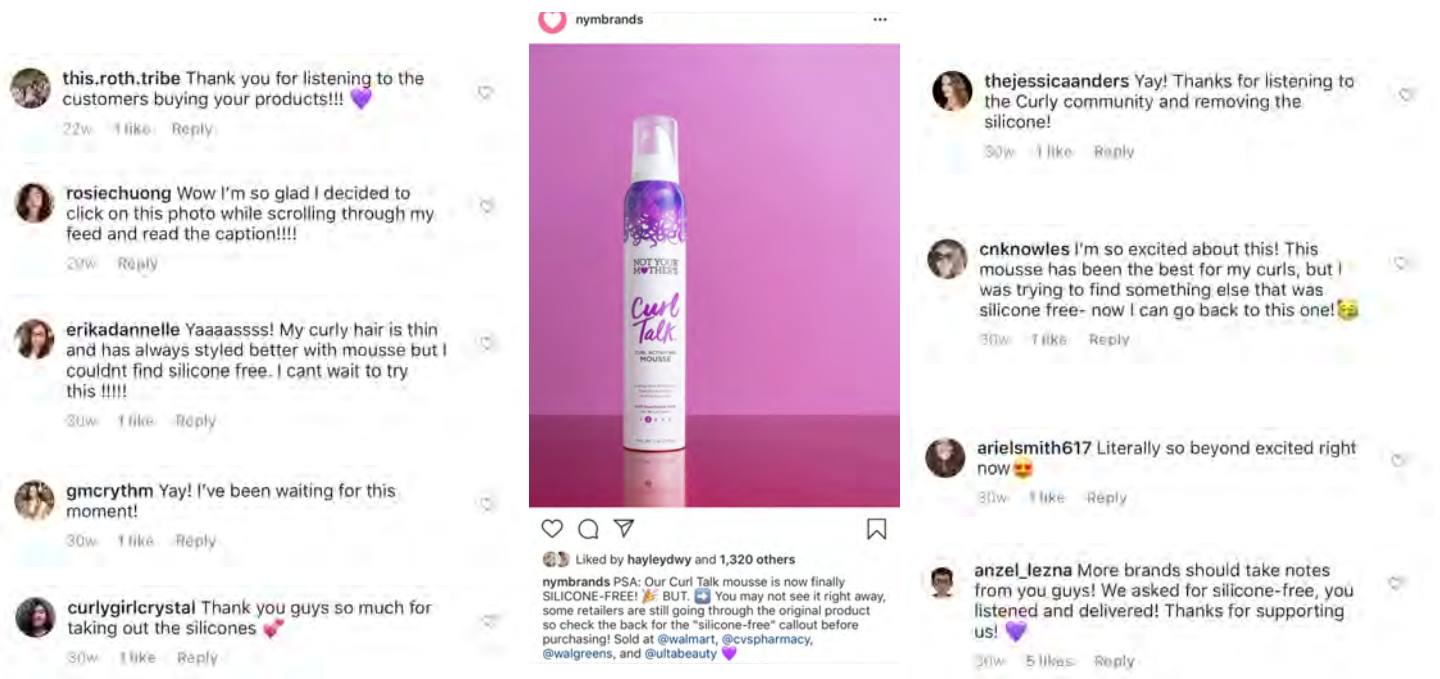
As mentioned above, there was a choice made to formulate the mousse with silicones. What happened on social media when the community spoke out about this choice makes for a great example to show the relationship between brand and consumers. We see just how impactful not only macro influencers, such as Penny Tovar, but micro influencers⁹ as well. The comments were all over the place showing emotions of hurt, disgust, and disbelief that NYM would launch a curl product with the one thing these girls refuse to use. There was an abundance of messages asking for the formulation to be changed so that the whole line could be used and enjoyed by the demographic it was made for.

After deliberation, the marketing team decided that something should be done. They saw their competitors rising up to the challenge of producing products that were free of all the

⁹ 50,000 followers or less

major things curly girls want. Mia, the Director of Social Media Marketing for Not Your Mother's was quoted saying that, "Making this choice to change the formula was pivotal in staying relevant in this changing market. Our chemist says those silicones were not bad, we know those silicones are not bad, but it isn't about what we want. It is about what our consumers believe. If we do not make a product they will use, then what is the point of making product?"

Below is the reaction to the announcement made about 6 and a half months after the initial Curl Talk launch. As is abundantly clear, the NYM community reacted positively and appreciatively. Only 6 months later and consumers were reacting as though they had been waiting years for this change. Multiple comments applauded and thanked NYM for listening to their consumers.



Source: NYM Instagram Account (@nymbrands)

That is the power of social media through the eyes of a brand. Hearing what consumers want, being able to make that change, and then seeing the difference it has made in their consumer's purchasing.

Influencer Marketing Sustainability

The power of the Curly Girl Method shows the power of social media. The fact that influencers who represent clean and non-toxic ingredients in their curl care products are the same influencers who do not follow Massey, yet represent DevaCurl brands and the Curly Girl Method show the power of word of mouth.

The ultimate question, however, is how sustainable is influencer marketing? The influencers and consumers that had a major impact in the reformulation of Not Your Mother's Curl Talk Mousse are people who in three years could adopt the trend of shaving their head bald and in turn need no hair product at all.

By businesses following trends made popular by wide spread social media awareness they are playing into listening to the consumer short term, but there is a possibility that as social media grows, peaks, and experiences a downfall, markets that were shaped by social will see a drastic change and disruption.

Forbes says that in the past year Facebook's market share has dropped 10% while Pinterest and Twitter have seen about a 5% market share increase (Angelovska, 2019). While this does not show any proof that social media is "on its way out," it does show that social is changing. It begs the question of the relevance Instagram will have as the most effective tool to allow for widespread micro trends, such as the Curly Girl Method, to take hold.

After seeing the impact influential people have made on the hair care industry it would be ill-advised to discredit social trends as a means of product innovation. However, seeing how a sample of influencers who follow the trends largely made popular by Massey do not follow Massey herself on Instagram make using this method of research for new market developments a weak leg to stand on as the only method. Brands should continue to look to trends inside and outside of the industry when deciding what their next big innovation should be.

Conclusion

The purpose of this paper was to explain and analyze a small piece of the hair care industry that has been heavily impacted by the routine of one woman. Using Lorraine Massey's Curly Girl Method as an example of the power of social media and influencer culture, this paper offers an interesting dive into the use of trends as a means to stay relevant. It also speaks to the power of trust that social media communities have built. It shows how that trust dictates what brands develop regardless of practicality and true need in the specific industry of hair care.

While it is easy to say that this Curly Girl Methodology will be around forever it is also important to note that just as quickly as this trend came into the hair care industry it can leave. This trend can lend way to a new fad that will dictate the market. Brands need to always have their finger on the pulse of their market while balancing the needs of their consumers to make relevant products and be able to course correct during product launches. The future is social media, the concern, however, is the ever changing landscape of these platforms that are now dictating goods and services being created.

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