AFM AGENCY

Black Friday on TikTok Shop

What Should Beauty Brands Do Differently?

A data-led TikTok Shop **BFCM** operating playbook for **U.S. beauty brands.**

What changed across products, creators and video messaging in 2025—and how beauty brands can turn those shifts into a sharper 2026 BFCM plan.

30 BEAUTY BRANDS | 2025 PRE-BF VS BFCM | 2026 PLAYBOOK

What changed for Black Friday?
What should change for your brand?

Across 30 U.S. beauty brands, Black Friday changed which products led, who promoted them, and how clearly videos gave shoppers a reason to buy—not just how often they posted.

30 brands
14K+ BF videos

Product-linked video sample
2025 Jan–Oct + BF
2026 Jan–May

01 / PRODUCTS

83.2%

of BF videos linked products already promoted pre-BF.

2026 / Start with a tested slate.
Then decide which product leads.



PHOTO / ALEKSANDRS KAREVS · UNSPLASH

02 / CREATORS

63.6%

of distinct product–creator pairings during BF were newly observed.

Returning brand–creator IDs still drove 43.4% of BF videos.

2026 / Combine proven partners with new product–creator pairings.

A DIFFERENT CONVERSION HERO

18 / 30

brands changed their most-linked product title during Black Friday.

2026 / Re-rank the hero—not necessarily the whole assortment.

03 / VIDEOS & MESSAGING

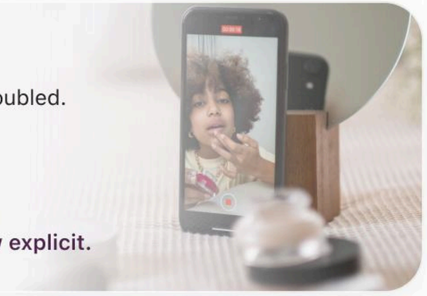
27.5% → 61.9%

October ramp → BF window

Oct
BF

Event language more than doubled.
Offer, gifting and urgency became more explicit.

2026 / Keep product proof.
Make the reason to buy now explicit.



Familiar products. New pairings. A clearer reason to buy now. Three decisions for your 2026 BFCM plan.

Gloda, 30-brand sample. Pre-BF: Jan–Oct 2025; BF: Nov 20–30. Captions: October vs BF. Photos: A. Karevs / Unsplash; Ron Lach / Pexels; AFM. Contextual, not sample evidence.

THE BFCM DECISION

Black Friday is not a bigger posting calendar.

It is a decision about which products deserve attention, which creators make them credible, and what makes shoppers act now.

Why a new strategy is needed

During the rest of the year, beauty content can introduce a product, demonstrate a result and build familiarity over repeated encounters. BFCM puts those decisions under a deadline. Adding creators or posts may increase activity without revealing which product–creator pairing deserves the next dollar.



THE QUESTION

What did beauty brands change for Black Friday in 2025, and which moves should brands make in 2026?

30 brands · product links · creator overlap · video messaging Analyzed

The answer, in three shifts

PRODUCTS

Familiar titles, a different lead

83.2% of BF videos linked a product title seen pre-BF, yet **18 of 30** brands changed their most-linked title. Test proven anchors alongside challengers; let conversion and economics decide the hero.

CREATORS

Depth and discovery worked together

43.4% of BF videos came from returning brand–creator IDs, while **63.6%** of distinct BF pairings were newly observed. Give familiar partners and new voices different jobs.

VIDEOS

The purchase moment became explicit

Event language in captions rose from **27.5%** in the October ramp to **61.9%** during BF. Keep the product proof, but make the offer, gifting occasion or deadline clear.

This report turns those shifts into product, creator and creative decisions for a 2026 BFCM plan.

Executive summary: from 2025 shifts to 2026 decisions

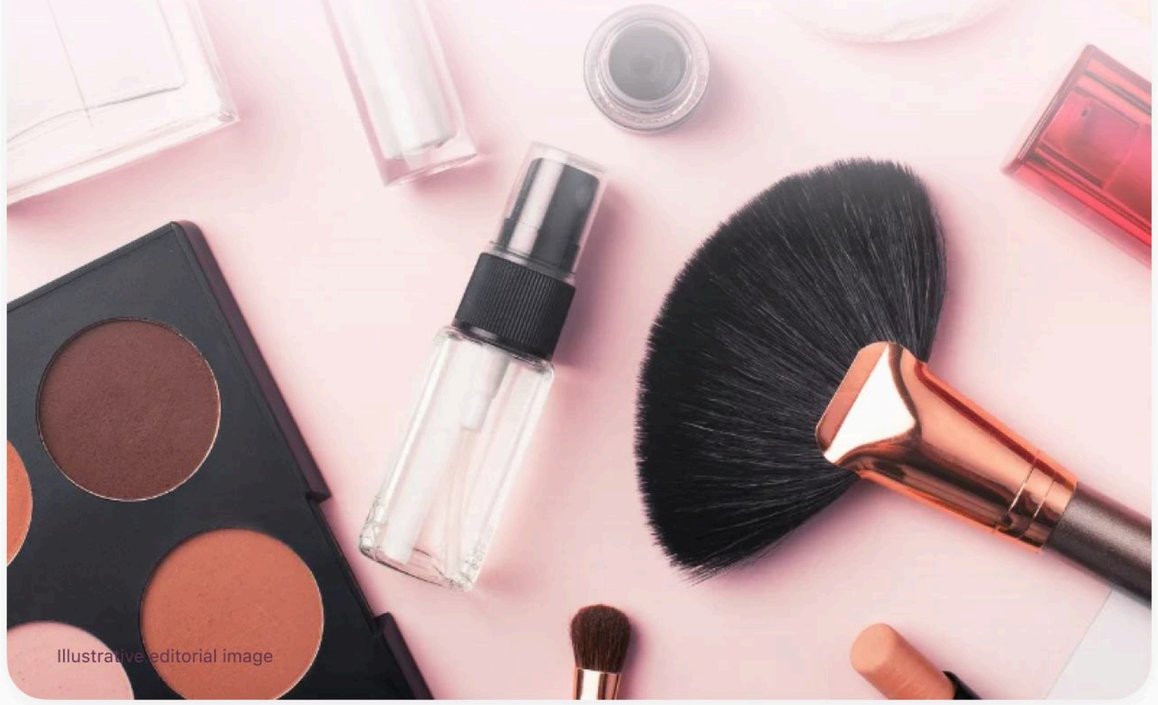
The opening findings become a practical comparison here: 2025 pre-BF activity, the 2025 BF posting window, current 2026 pre-BF choices, and the resulting brand decision for BFCM. Read across each row to see what changed in product priorities, creator mix and video messaging—and what to test next.

DECISION AREA	2025 PRE-BF JAN–OCT	2025 BF-POSTED NOV 20–30	2026 PRE-BF JAN–MAY	2026 BFCM BRAND DECISION
PRODUCTS	Brands built product visibility across an existing assortment. That gave them multiple titles to promote or reposition for the event.	83.2% of BF videos linked a pre-BF title; yet 18/30 brands changed the title receiving the most video links.	153/274 matched Jan–May videos linked a 2025 BF title. Familiar products remain candidates, alongside new challengers.	**Enter with several proven anchors and challengers.** Choose the BFCM heroes by conversion, margin, inventory and results across creators.
CREATORS	The pre-BF period established a pool of creators already associated with each brand—and a basis for testing new fits.	43.4% of BF videos came from returning brand–creator IDs; 63.6% of distinct BF pairings were newly observed.	Use the current product–creator pairings to identify where a benefit is already resonating and where fresh audiences are needed.	**Build two lanes:** rebrief effective returning creators and recruit discovery creators for specific products. Scale pairings that repeat.
VIDEOS & MESSAGING	Most of the year built product understanding; event framing accelerated in October, when 27.5% of captions used BF wording.	During BF, 61.9% of captions used event language. The clear shift was a more explicit reason to purchase now.	Review current product hooks and creator language to decide which benefits can credibly support a deal or gifting story.	**Brief benefit, demonstration, offer and gift angles by product.** Keep the product proof; make the BFCM purchase case explicit.

READ ACROSS / Use each historical shift to make a specific product, creator and creative decision for 2026.

01 / PRODUCTS

Products stayed familiar. The lead title changed.



Illustrative editorial image

Before Black Friday, many brands built broad product visibility. During the event, the product pool remained familiar—but the lead title often changed. Recognition helped; the choice of hero still had to be made.

83.2%

of BF videos linked a title already seen before BF

Share of BF videos linking a pre-BF title

18 / 30

brands changed their most-linked title during BF

18 changed lead · 12 kept the same lead

Source: Gloda ecommerce videos, selected 30-brand sample; 2025 Jan–Oct vs BF-posted Nov 20–30.

How we compared the three windows

AFM compared product-linked TikTok Shop videos across 30 selected U.S. beauty brands. The 2025 everyday baseline covers Jan 1–Oct 31, followed by videos posted Nov 20–30 for BF. Matching product titles and creator IDs lets us examine what stayed in the mix, what moved to the foreground, and how brands changed their creator and caption strategy. The 30-brand tables make those differences visible brand by brand.

The 2026 pre-BF view covers Jan–May and brings the historical comparison into today's planning decisions. We use current product links to identify candidate SKUs and creator–product combinations for testing. The goal is an operating plan: which products to prioritize, which creators to brief, what purchase proposition to develop, and when to increase investment. Detailed definitions and coverage notes appear in the methodology.

1 | Products: what changed from everyday promotion to Black Friday?

Before choosing a BF hero, brands need to know what creators were already linking. The 30-brand table compares assortment breadth and each period's most-linked title. It shows whether the event elevated an established product, introduced a challenger or reshuffled attention within the same portfolio.

In the two numeric columns, the format is videos / distinct product titles / videos linking the leading title. "Product continuity" is the share of a brand's BF videos linking a normalized exact title already observed for that brand in Jan–Oct.

Brand	Jan–Oct V / P / leader V	BF V / P / leader V	Product continuity	Most-linked title: pre-BF → BF
Anua	35,619 / 181 / 5,701	551 / 40 / 108	90.6%	Viral Ultimate Glass Skin… → Affordable Full-Korean Gl…
Based Bodyworks	19,391 / 32 / 6,345	46 / 12 / 27	91.3%	BASED Hair Texture Powder → BASED Ultimate Straight/W…
Bask & Lather	23,630 / 7 / 16,401	69 / 3 / 35	100.0%	STRONG HOLD- THICK EDGES-… → same
Biodance	3,931 / 49 / 1,102	36 / 5 / 22	66.7%	8 OG Hydrogel Face Mask B… → same
Buxom	1,729 / 71 / 634	74 / 9 / 22	98.6%	BUXOM Lash Xtension Lift… → BUXOM Sweet As Suga Mini…
COSRX	9,651 / 187 / 1,270	443 / 51 / 199	96.4%	The Peptide Collagen Hydr… → same
Clinique	1,105 / 175 / 93	415 / 21 / 71	75.2%	Clinique Almost Lipstick… → Honey Lip & Cheek Bundle…
Color Wow	19,979 / 176 / 4,092	567 / 47 / 138	100.0%	Color Wow Dream Coat Friz… → same

DATA EXHIBIT / CONTINUED

Brand	Jan–Oct V / P / leader V	BF V / P / leader V	Product continuity	Most-linked title: pre-BF → BF
ColourPop	23,870 / 397 / 1,701	515 / 51 / 53	99.4%	ColourPop Shadow Stix - C... → ColourPop® Lippie Pencil...
Dr. Althea	777 / 33 / 449	41 / 7 / 33	85.4%	345 Relief Cream - Daily... → same
Dr. Melaxin	33,453 / 106 / 18,178	2,558 / 49 / 463	59.8%	Peel Shot Glow Rice Ampou... → Radiant Blowout Routine S...
Glamlite	9,124 / 62 / 5,383	199 / 18 / 71	64.3%	Glamlite's #1 Best-Sellin... → same
Hismile	1,292 / 13 / 851	121 / 3 / 109	99.2%	Hismile V34 Whitening Str... → same
Kitsch	17,800 / 234 / 3,922	947 / 70 / 139	80.5%	All Lengths Adjustable Sa... → Warm Sugar Hair Perfume -...
Laneige	10,220 / 127 / 3,300	663 / 20 / 180	95.8%	Laneige Glaze Craze Tinte... → Laneige Midnight Minis, H...
M.A.C	611 / 37 / 121	175 / 27 / 24	70.3%	MAC Everyday Lip Trio - L... → MAC Doja Cat Lip Duo
MISSHA	3,992 / 50 / 3,583	202 / 6 / 153	100.0%	M Perfect Cover BB Cream... → same
Maybelline	28,711 / 81 / 14,092	371 / 18 / 99	98.9%	Colossal Bubble Mascara,... → Serum Lipstick, Satin & M...
NYX	27,515 / 128 / 4,866	155 / 20 / 64	58.7%	Smushy Matte Lip Balm, So... → Jelly Job Full-Bodied Shi...
ONE/SIZE	2,001 / 43 / 521	15 / 4 / 12	100.0%	ONE/SIZE Ultimate Blurrin... → ONE/SIZE Cheek Clapper 3D...
SKIN1004	15,230 / 268 / 3,965	701 / 50 / 95	92.2%	ZOMBIE BEAUTY Zombie Pack... → Centella Daily Care Set
SUNGBOON EDITOR	10,902 / 69 / 3,936	123 / 11 / 65	96.7%	Filler Serum → Silk Peptide Intensive Am...
TIRTIR	10,150 / 135 / 1,525	5 / 3 / 2	100.0%	Mask Fit Red Cushion Foun... → Mask Fit AI Filter Cushio...
Tarte	35,966 / 284 / 3,638	1,424 / 81 / 231	90.0%	tarte colored clay CC und... → same
The Ordinary	5,685 / 72 / 2,226	138 / 13 / 69	99.3%	The Ordinary Glycolic Aci... → NEW The Ordinary - PHA 5%...
VT Cosmetics	10,934 / 76 / 4,123	138 / 9 / 51	100.0%	#1 viral Reedle Shot Lip... → same
Wonderskin	9,581 / 48 / 5,622	230 / 13 / 85	100.0%	Wonderskin WONDER BLADING... → same
e.l.f.	9,029 / 567 / 1,338	169 / 19 / 86	18.3%	e.l.f. Glow Reviver Melti... → Wake the e.l.f. Up Skinca...
goPure	39,407 / 84 / 14,386	204 / 23 / 71	100.0%	GOPURE Neck Cream Tighten... → GOPURE Tighten & Smooth B...
medicube	35,280 / 249 / 2,997	2,766 / 98 / 382	86.0%	Affordable Glass Glow Ski... → same

Product continuity did not mean a static hero

Familiar products, a different lead

Across the 30 brands, 83.2% of BF-posted videos linked familiar product titles, yet **18 brands** changed their most-linked title. Maybelline illustrates the distinction: 98.9% of its BF videos linked pre-BF titles, while Serum Lipstick replaced Colossal Bubble Mascara at the top. Buxom, The Ordinary and goPure also shifted their lead within a familiar assortment. BF redirected attention; it did not always require a new launch.

A bigger shift in the product mix

Other brands changed the visible mix more substantially. Only 18.3% of e.l.f.'s BF videos linked a pre-BF title, versus 58.7% for NYX and 59.8% for Dr. Melaxin; all three changed their most-linked title. The spectrum runs from reweighting familiar SKUs to emphasizing different products. A proven anchor can protect baseline demand, while a challenger can make the event feel fresh. Brands should test that split through creator–SKU conversion, not assume one formula fits every assortment.

Look beyond the leading product

The exceptions keep this from becoming a one-rule playbook. Glamlite retained Lip Kits as its most-linked title while the rest of its mix moved. TIRTIR showed a different leader despite full title continuity, although only five BF videos matched the query. Together, these cases show why brands should examine both the leading product and the surrounding assortment—and weight a pattern by the amount of evidence behind it.

2026 action: test several candidates before choosing the hero

For 2026, build a slate rather than naming one hero too early: several products with proven demand, plus challengers with a clear benefit, gift appeal or bundle proposition. Put comparable creator briefs behind each candidate. Promote a challenger to hero only when it wins on verified orders, contribution margin, stock readiness and repeatability across more than one creator.

Visibility is not the same as distributed demand

The examples below distinguish broad creator coverage from a result concentrated in one post. A product with many linked videos may still have weak recorded sales estimates, while a high estimate can be dominated by a single outlier. That difference matters when deciding whether to widen creator distribution or keep testing the proposition.

RESEARCH NOTE The most-linked title shows where creator attention went; check the spread of actual orders before calling it a bestseller.

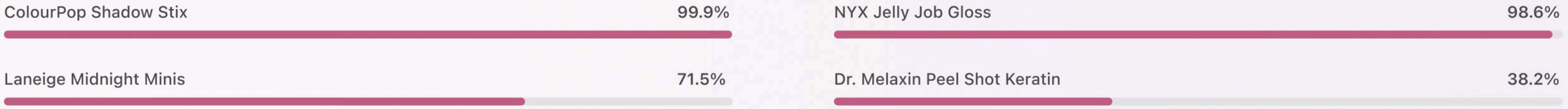
Product-title group	Jan–Oct videos / creators	BF videos / creators	BF-posted videos' estimated units at export	Share from largest single video
ColourPop Shadow Stix	1,984 / 829	71 / 44	11,962	99.9%
Laneige Midnight Minis	50 / 32	180 / 114	1,330	71.5%
Dr. Melaxin Peel Shot Keratin	172 / 71	149 / 56	2,413	38.2%
NYX Jelly Job gloss	Not observed Jan–Oct	64 / 55	1,705	98.6%
SKIN1004 TikTok Viral Set	164 / 135	41 / 31	680	53.1%
medicube Glass Glow Set	2,997 / 1,621	382 / 208	35	—

ColourPop's Shadow Stix shows extreme concentration: one BF-posted video accounted for 99.9% of its recorded estimate. Laneige Midnight Minis spread its estimate across more posts, while medicube Glass Glow Set had broad video and creator coverage with a much lower estimate. One breakout suggests a hook to replicate; repeated results across creators make a stronger scaling case.

For a 2026 product review, show the distribution—not just a total. Put each candidate's number of active creators, number of converting videos, median result and top-video concentration beside first-party sales and margin. If one post drives the story, replicate the creator–product–message pairing before committing the full BF budget.

One video can dominate a product's recorded estimate

Share of each product's BF-posted video estimate attributed to its largest single video



02 / CREATORS

Keep the partners who deliver. Open room for new product–creator fits.



Black Friday did not replace the everyday roster with an entirely new one. Returning brand–creator relationships drove depth, while new product–creator pairings widened discovery. The two lanes needed different briefs and different tests.

43.4%

of BF videos came from returning brand–creator IDs

63.6%

of distinct BF product–creator pairings were new

Source: Gloda ecommerce videos, selected 30-brand sample; BF-posted Nov 20–30. Image is illustrative.

2 | Creators: who carried everyday sales—and who appeared for BF?

Returning creator IDs produced 6,104 of 14,061 BF videos (43.4%). Yet 4,715 of 7,413 distinct BF brand–creator pairings (63.6%) were newly observed. The roster had two jobs: familiar creators provided posting depth, while new pairings widened reach and product–audience fit. Brands should brief and measure those jobs separately.

The table compares each brand's BF creator IDs with its Jan–Oct baseline. A returning creator appeared with the same brand in both periods. Video share shows the depth of familiar-creator posting; distinct-pair share shows how widely the brand expanded its observed roster.

Brand	Creator IDs pre-BF → BF	Returning IDs / BF IDs	BF videos by returning IDs	BF micro-creator video share
Anua	9,931 → 275	113 / 275	259 / 551 (47.0%)	58.3%
Based Bodyworks	3,849 → 23	14 / 23	27 / 46 (58.7%)	58.7%
Bask & Lather	14,719 → 46	18 / 46	34 / 69 (49.3%)	60.9%
Biodance	1,760 → 34	6 / 34	6 / 36 (16.7%)	63.9%
Buxom	1,063 → 54	13 / 54	18 / 74 (24.3%)	54.1%
COSRX	4,436 → 262	51 / 262	111 / 443 (25.1%)	64.3%
Clinique	708 → 264	16 / 264	27 / 415 (6.5%)	61.4%
Color Wow	6,592 → 253	111 / 253	263 / 567 (46.4%)	53.6%
ColourPop	7,730 → 347	171 / 347	273 / 515 (53.0%)	68.5%
Dr. Althea	363 → 29	5 / 29	14 / 41 (34.1%)	53.7%
Dr. Melaxin	11,713 → 1,197	493 / 1,197	1,227 / 2,558 (48.0%)	64.2%
Glamlite	2,879 → 101	46 / 101	100 / 199 (50.3%)	70.4%
Hismile	971 → 91	7 / 91	10 / 121 (8.3%)	58.7%
Kitsch	8,454 → 579	171 / 579	316 / 947 (33.4%)	55.5%
Laneige	4,285 → 430	132 / 430	212 / 663 (32.0%)	65.2%

DATA EXHIBIT / CONTINUED

Brand	Creator IDs pre-BF → BF	Returning IDs / BF IDs	BF videos by returning IDs	BF micro-creator video share
M.A.C	342 → 110	27 / 110	54 / 175 (30.9%)	58.3%
MISSHA	2,245 → 140	25 / 140	46 / 202 (22.8%)	52.0%
Maybelline	12,139 → 294	149 / 294	196 / 371 (52.8%)	68.5%
NYX	10,893 → 135	70 / 135	80 / 155 (51.6%)	60.6%
ONE/SIZE	1,284 → 11	4 / 11	6 / 15 (40.0%)	60.0%
SKIN1004	7,566 → 322	85 / 322	207 / 701 (29.5%)	57.9%
SUNGBOON EDITOR	6,244 → 78	20 / 78	32 / 123 (26.0%)	65.0%
TIRTIR	3,603 → 5	4 / 5	4 / 5 (80.0%)	40.0%
Tarte	9,217 → 597	335 / 597	946 / 1,424 (66.4%)	61.7%
The Ordinary	3,279 → 114	22 / 114	28 / 138 (20.3%)	56.5%
VT Cosmetics	5,890 → 68	19 / 68	27 / 138 (19.6%)	62.3%
Wonderskin	4,241 → 94	26 / 94	95 / 230 (41.3%)	74.8%
e.l.f.	5,128 → 142	22 / 142	29 / 169 (17.2%)	60.4%
goPure	17,015 → 139	58 / 139	99 / 204 (48.5%)	55.4%
medicube	13,665 → 1,179	465 / 1,179	1,358 / 2,766 (49.1%)	61.4%

The strongest creator plan uses two different jobs

Keep continuity. Add new reach.

Tarte, medicube and Laneige all entered BF with substantial creator continuity: 335 of Tarte's 597 BF creator IDs, 465 of medicube's 1,179 and 132 of Laneige's 430 had appeared with the same brand before BF. Each also added newly observed IDs. The lesson is not to keep or replace the roster wholesale. Rebrief returning creators around products and claims they can sell credibly, while using fresh creators to reach audiences or product use cases the existing group does not cover.

Repeat execution is not conversion.

Across all brands, returning pairs generated 43.4% of BF videos but represented 36.4% of distinct BF pairings. That means they posted more frequently per observed pairing—2.26 videos versus 1.69 for newly observed pairs. Frequency alone does not establish stronger conversion; it shows where brands had deeper repeat execution. For 2026, compare the same product and message across the two creator lanes before shifting spend toward either one.

2026 action: select for repeatability

The next table lists the creator with the highest Gloda recorded estimated-unit total for each brand's BF-posted videos. Use it to inspect operating patterns, not to buy followers by rank. A one-post spike, a six-post run and a thirty-post program require different briefs, budgets and replication tests. The question is which creator can make a specific product persuasive repeatedly.

Brand	Creator with highest recorded estimate	BF videos	Followers at export	Estimated units attached
Anua	Jazmin Bloom	5	82K	163
Based Bodyworks	Stash	1	1.19M	569
Bask & Lather	gabss.finds	1	7.9K	7
Biodance	lola eubanks	1	82K	14
Buxom	No positive estimate recorded	—	—	0
COSRX	Gemma Fitz	2	23K	210
Clinique	Jodie	4	176K	127
Color Wow	gelenasolanotv	3	66K	62
ColourPop	Sylvia	1	54K	11,948
Dr. Althea	No positive estimate recorded	—	—	0
Dr. Melaxin	Jackie	6	58K	1,169
Glamlite	Rianna	8	69K	303
Hismile	El compa chema_777	2	362K	130

DATA EXHIBIT / CONTINUED

Brand	Creator with highest recorded estimate	BF videos	Followers at export	Estimated units attached
Kitsch	Susie	1	39K	59
Laneige	Shamela	1	156K	951
M.A.C	boomkackmua	3	150K	102
MISSHA	Sarahi	3	78K	67
Maybelline	paige	3	206K	64
NYX	Mikayla Nogueira	1	17.4M	1,681
ONE/SIZE	Lasarcarivera27	1	1.39M	6
SKIN1004	Una gochita y un chapin	2	222K	361
SUNGBOON EDITOR	Olga Maria Gonzalez	2	552K	8
TIRTIR	adi	1	2.23M	317
Tarte	deb	6	7.5K	149
The Ordinary	Mia Rena	1	1.84M	30
VT Cosmetics	linsmakeuplooks	1	3.20M	738
Wonderskin	Kajsa	30	58K	102
e.l.f.	Gaby	2	154K	85
goPure	Selfiequeen	2	268K	1
medicube	Yanique	4	125K	862

03 / VIDEO MESSAGING

The product proof stayed. The reason to buy now became clearer.



The event did not make demonstrations irrelevant. It made the purchase occasion more explicit: offer, gifting and deadline cues appeared alongside the product benefit, giving shoppers a timely next step.

EVENT LANGUAGE IN CAPTIONS

27.5% → 61.9%

October ramp → BF window

ILLUSTRATIVE CREATIVE SEQUENCE

- Show the product result
- Make the offer explicit
- Give a timely next step

Source: Gloda ecommerce videos; caption keyword matches in selected brands. October 2025 vs BF-posted Nov 20–30. Image and caption examples are illustrative.

Sylvia's recorded ColourPop result came from one video and drove almost the entire Shadow Stix title-group estimate. Jackie's Dr. Melaxin total came from six posts; Wonderskin's leading creator total came from 30 posts. These three patterns point to different decisions. Replicate a one-off hit before expanding it; standardize the elements behind a multi-post run; and check whether a high-volume program remains efficient as marginal posts are added.

For 2026, split creator sourcing into two lanes with different briefs. Returning partners should deepen promising product–message combinations and deliver predictable coverage. Discovery creators should test new audiences, use cases and presentation styles. Evaluate both on creator–SKU fit, verified orders, cost, repeatability and the quality of the actual product demonstration—not follower count alone.

3 | Video messaging: what changed when the event arrived?

The sharpest visible creative shift was purchase framing. BF/BFCM/Cyber Monday language appeared in 8,697 of 14,061 BF-posted captions (61.9%), versus 827 of 3,010 (27.5%) during the immediate October ramp. Event wording increased across all 30 brands relative to their Jan–Oct baseline; deal wording rose for 28 and gift/holiday wording for 27. The event gave creators a new job: connect the product benefit to a timely reason to act.

The following table shows matched caption counts and denominators for every brand, from Jan–Oct pre-BF to Nov 20–30 BF. Event, deal and gift themes can overlap within one caption. Read the change as a shift in messaging emphasis, then inspect the linked product and the actual video to decide whether the claim, offer and occasion fit together.

Event language became markedly more common

Caption keyword matches across the 30 selected brands; not a conversion measure



Brand	Jan–Oct / BF videos	Event matches: pre → BF	Deal matches: pre → BF	Gift matches: pre → BF
Anua	35,619 / 551	276/35,619 → 346/551	4,156/35,619 → 91/551	404/35,619 → 26/551
Based Bodyworks	19,391 / 46	55/19,391 → 24/46	2,262/19,391 → 15/46	64/19,391 → 1/46
Bask & Lather	23,630 / 69	95/23,630 → 50/69	941/23,630 → 19/69	38/23,630 → 3/69
Biodance	3,931 / 36	20/3,931 → 19/36	227/3,931 → 3/36	52/3,931 → 0/36
Buxom	1,729 / 74	19/1,729 → 42/74	73/1,729 → 14/74	24/1,729 → 21/74
COSRX	9,651 / 443	70/9,651 → 239/443	782/9,651 → 72/443	57/9,651 → 17/443
Clinique	1,105 / 415	16/1,105 → 248/415	59/1,105 → 53/415	10/1,105 → 46/415
Color Wow	19,979 / 567	241/19,979 → 343/567	2,159/19,979 → 144/567	177/19,979 → 28/567
ColourPop	23,870 / 515	175/23,870 → 310/515	2,776/23,870 → 79/515	261/23,870 → 106/515
Dr. Althea	777 / 41	3/777 → 27/41	37/777 → 10/41	2/777 → 2/41
Dr. Melaxin	33,453 / 2,558	559/33,453 → 1,526/2,558	3,650/33,453 → 391/2,558	327/33,453 → 163/2,558
Glamlite	9,124 / 199	21/9,124 → 120/199	543/9,124 → 21/199	112/9,124 → 16/199
Hismile	1,292 / 121	12/1,292 → 54/121	83/1,292 → 5/121	8/1,292 → 4/121
Kitsch	17,800 / 947	254/17,800 → 602/947	1,373/17,800 → 150/947	153/17,800 → 176/947
Laneige	10,220 / 663	77/10,220 → 420/663	228/10,220 → 82/663	280/10,220 → 315/663
M.A.C	611 / 175	13/611 → 119/175	45/611 → 21/175	2/611 → 19/175
MISSHA	3,992 / 202	49/3,992 → 121/202	223/3,992 → 18/202	13/3,992 → 10/202
Maybelline	28,711 / 371	98/28,711 → 208/371	1,004/28,711 → 25/371	213/28,711 → 29/371
NYX	27,515 / 155	41/27,515 → 80/155	614/27,515 → 6/155	368/27,515 → 7/155
ONE/SIZE	2,001 / 15	11/2,001 → 5/15	106/2,001 → 1/15	12/2,001 → 0/15
SKIN1004	15,230 / 701	84/15,230 → 484/701	1,126/15,230 → 169/701	199/15,230 → 44/701

DATA EXHIBIT / CONTINUED

Brand	Jan–Oct / BF videos	Event matches: pre → BF	Deal matches: pre → BF	Gift matches: pre → BF
SUNGBOON EDITOR	10,902 / 123	58/10,902 → 75/123	491/10,902 → 16/123	74/10,902 → 4/123
TIRTIR	10,150 / 5	63/10,150 → 2/5	310/10,150 → 1/5	71/10,150 → 0/5
Tarte	35,966 / 1,424	308/35,966 → 784/1,424	6,054/35,966 → 232/1,424	727/35,966 → 599/1,424
The Ordinary	5,685 / 138	60/5,685 → 74/138	145/5,685 → 5/138	64/5,685 → 5/138
VT Cosmetics	10,934 / 138	43/10,934 → 68/138	425/10,934 → 14/138	96/10,934 → 3/138
Wonderskin	9,581 / 230	32/9,581 → 173/230	988/9,581 → 45/230	123/9,581 → 22/230
e.l.f.	9,029 / 169	12/9,029 → 118/169	232/9,029 → 11/169	84/9,029 → 61/169
goPure	39,407 / 204	281/39,407 → 156/204	3,731/39,407 → 41/204	481/39,407 → 9/204
medicube	35,280 / 2,766	419/35,280 → 1,860/2,766	3,771/35,280 → 601/2,766	504/35,280 → 268/2,766

The event gave familiar products a new reason to buy

Make the gifting angle credible.

Laneige and Tarte show how that shift can be product-specific. Gift/holiday language accompanied **315 of Laneige's 663** BF videos, compared with 280 of 10,220 across Jan–Oct; Tarte moved to **599 of 1,424** BF videos from 727 of 35,966 pre-BF. A gifting angle makes sense only when the product, packaging and price create a credible gift. A deal angle needs an equally clear value proposition. Brands should brief the reason to buy, not simply add a BF hashtag.

Brief proof—not just keywords.

A caption keyword alone is not the strategy. The offer has to be legible and believable in the video, and the product proof still has to carry the sale. For 2026, write each brief around three linked elements: **the problem or occasion, the product evidence, and the event-specific action**. This makes different hooks comparable without forcing every creator into the same script.

2026 action: clarify why to buy now.

The immediate October-to-BF median video duration moved only from **28 to 27 seconds**. The notable adjustment was not "make every video shorter"; it was to **make the shopping context clearer**. Brief a mix of formats suited to the product, then evaluate the opening hook, demonstration, offer clarity and verified orders together.

Four video examples, four purchase propositions

The BF-posted examples below pair each linked product with the creator's caption. They are useful because they show how a specific product was positioned at the point of posting: as a gift, as a treatment for a concern, as a discovery or as a deal. The actual footage should be reviewed before turning any of these into a repeatable format brief.

Video	Linked product	Caption-level hook	Views at export	Gloda estimated units at export
Sylvia / ColourPop	Shadow Stix	"Easy eyeshadow" with BF creator-pick tags	16.5M	11,948
Mikayla Nogueira / NYX	Jelly Job Gloss	Product-name curiosity question	3.0M	1,681
Shamela / Laneige	Midnight Minis	BF sale and stocking-stuffer framing	2.7M	951
Jackie / Dr. Melaxin	Peel Shot Keratin	Dark-spot/problem framing plus BF tag	7.5M	922
Yanique / medicube	Peel Shot Duo	Social-reference hook around the product	3.3M	862
Treasure Laurent / SKIN1004	TikTok Viral Set	Pore concern plus stated BFCM offer	2.7M	318

The hooks solve different shopper problems. Laneige's Midnight Minis connected a recognizable product with the gifting moment. Jackie's Dr. Melaxin post centered a treatment and a specific concern. Mikayla's NYX post used product curiosity to pull viewers in. Each hook has a different fit with product price, familiarity and creator voice. The 2026 brief should preserve that fit while making the BF purchase case clear.

For each priority SKU, commission several creative routes—benefit, demonstration, offer and gifting where appropriate—across creators with different audience profiles. Compare results under similar commercial conditions. Keep the route that produces repeatable first-party orders, then produce variations of its strongest proof and call to action rather than copying the entire video.

FROM OBSERVATION TO ACTION

The 2026 move is not to copy last year's winners.

153 / 274 = 55.8% title continuity. Keep a proven lane and a challenger lane; validate their roles with new tests rather than inherit last year's ranking.



What the 2026 evidence changes

Use today's traction to build a shortlist. Then test which product–creator–message combinations can repeat under Black Friday conditions.

In the matched Jan–May 2026 extract, more than half of videos linked a title also observed in the 2025 BF window (153 of 274). Continuity is a starting point for testing—not the final hero decision.

01 Shortlist products

Start with proven titles and challengers. Compare benefit, gift appeal, bundle value and stock readiness under the planned BFCM offer. Let comparable tests—not familiarity—determine which product earns the hero role.

02 Test creator fit

Give returning and new creators comparable product briefs. Test proof-led and offer-led hooks against the same SKU. Compare verified orders and contribution margin before choosing which creator–message combinations deserve more budget.

03 Scale repeatable pairs

Scale pairs that repeat across posts or creators—not one-post spikes. Recheck offer clarity, margin and stock before expanding spend. Keep a test lane open for challengers.

Source: Gloda matched ecommerce-video extract, 30-brand sample. Photo is illustrative.

4 | 2026 pre-BF: which products are building momentum now?

Current traction: build the testing shortlist

The Jan–May 2026 view brings the historical BF lesson into the current planning cycle. Across the same 30 brands, the ranked extract contains 274 matched product-linked videos from 25 brands. The table identifies titles currently attracting creator links and shows whether those titles also appeared in the 2025 BF window. It is a practical shortlist for the next round of SKU and creator testing.

Reading guide: what the columns measure

"2026 BF-title matches" counts exact product-title links also observed in the 2025 BF window. The final column names each brand's most-linked title in the Jan–May extract and its video count. Read it as a prompt to investigate current product–creator combinations, then pair it with the brand's own sales, margin and stock data.

Brand	2026 matched videos	Creator IDs	Videos linking a 2025 BF title	Most-linked title in the 2026 extract
Anua	2	2	0 / 2	Collagen Retinol Refining Guasha Cream (1)
Based Bodyworks	14	7	11 / 14	Shower Duo (4)
Bask & Lather	2	2	2 / 2	Strong Hold Edge Control (2)
Biodance	0	0	Not observed	—
Buxom	0	0	Not observed	—
COSRX	2	2	2 / 2	Peptide Collagen Eye Patch (1)
Clinique	1	1	1 / 1	Almost Lipstick, Three Shades (1)
Color Wow	1	1	1 / 1	Dream Coat for Curly Hair (1)
ColourPop	6	5	3 / 6	Shadow Stix (2)
Dr. Althea	9	1	6 / 9	345 Relief Cream (6)
Dr. Melaxin	60	40	51 / 60	Gifted Collagen Boost Set (15)
Glamlite	0	0	Not observed	—

DATA EXHIBIT / CONTINUED

Brand	2026 matched videos	Creator IDs	Videos linking a 2025 BF title	Most-linked title in the 2026 extract
Hismile	8	8	0 / 8	iD Stain Whitening Mouthwash (7)
Kitsch	6	6	4 / 6	Adjustable Satin Shower Cap (1)
Laneige	1	1	0 / 1	JuicePop & Glaze Craze Lip Duo (1)
M.A.C	5	5	4 / 5	MAC Girl Lip Trio (2)
MISSHA	2	2	2 / 2	M Perfect Cover BB Cream (2)
Maybelline	11	7	5 / 11	Sky Tubes Tubing Mascara (4)
NYX	15	12	1 / 15	Fluff & Snatch Brow Powder Pen (11)
ONE/SIZE	0	0	Not observed	—
SKIN1004	4	4	2 / 4	Hyalu-Cica Water-Fit Sun Serum (2)
SUNGBOON EDITOR	1	1	0 / 1	Zero-Cast Sunscreen (1)
TIRTIR	3	2	0 / 3	Mood Glider Lip & Blush Stick (2)
Tarte	25	23	18 / 25	Big Stick Energy Duo (7)
The Ordinary	4	4	3 / 4	Serum Foundation (2)
VT Cosmetics	0	0	Not observed	—
Wonderskin	4	3	4 / 4	1440 Longwear Eyeliner (3)
e.l.f.	11	10	5 / 11	Glow Reviver Melting Lip Balm (3)
goPure	16	11	1 / 16	Instant Lift Eye Gel (15)
medicube	61	44	27 / 61	PDRN Pink Collagen Volume Multi Balm (19)

2026 planning: connect current traction to BF readiness

Keep incumbents. Test challengers.

Among 274 matched Jan–May 2026 videos, 153 (55.8%) linked a title also seen in the 2025 BF window. Those products offer a starting pool with existing creator language and shopper education. Do not rerun last year's list unchanged: test them beside challengers for clearer proof, stronger conversion and better economics.

Concentration creates test candidates.

Several concentrations invite action. medicube's PDRN Multi Balm appears in 19 of its 61 matched videos; NYX's Fluff & Snatch Brow Powder Pen in 11 of 15; goPure's Instant Lift Eye Gel in 15 of 16. Take these products into a controlled creator test. Ask whether different creators can explain the benefit, whether shoppers convert, and whether BF pricing and stock work.

2026 action: decide before the briefs.

The 2026 pre-BF task is to turn visibility into a selection process. For each candidate, track distinct creators, repeat orders per video, conversion, contribution margin and inventory. Keep a few strong incumbents in the test; add challengers with a different shopper need or gift proposition. By the time BF briefs are finalized, the brand should know which product–creator–message combinations deserve priority.

5 | The 2026 BFCM operating plan

The 2025 comparison points to a portfolio decision, a roster decision and a message decision. Brands kept familiar products visible but often changed the lead title; returning creators posted deeply while newly observed pairings widened coverage; captions made the purchase occasion explicit. The 2026 plan is to test those three levers together and concentrate resources only when the combination works repeatedly.

01

Test a product slate

Run proven anchors and defined challengers through comparable creator briefs.

02

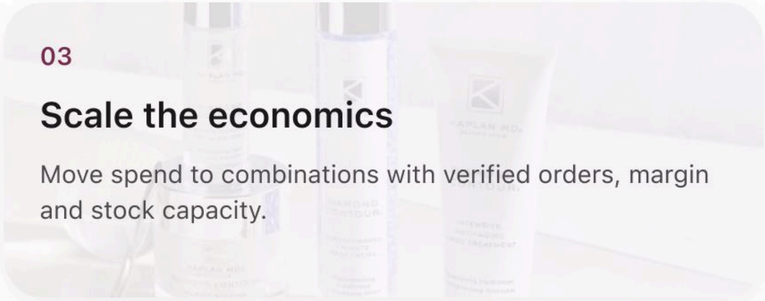
Find repeatable pairings

Check whether the same product–message fit works across creators and posts.

03

Scale the economics

Move spend to combinations with verified orders, margin and stock capacity.



Decision	Evidence from this analysis	2026 brand action	When to scale
Product selection	83.2% of BF videos linked a Jan–Oct title; 18/30 brands changed their most-linked title.	Test a slate of proven anchors and challengers; let the strongest SKU earn hero status.	Repeatable SKU orders, healthy margin, sufficient stock and multiple converting creators.
Creator sourcing	6,104/14,061 BF videos came from creator IDs observed with the same brand pre-BF.	Give returning creators depth; use discovery creators to test new product–audience fits.	Efficient, repeatable creator–SKU sales—not follower size or post count alone.
Creative briefs	Event wording rose in 30/30 brands; gift wording in 27/30.	Build product-specific benefit, proof, offer and gift briefs; make the reason to buy now clear.	The hook is visible in the video and produces orders under comparable offers.
Budget allocation	The top 1% of BF-posted videos held 93.3% of attached Gloda estimated units.	Start broadly enough to discover winners; shift budget toward repeatable combinations.	More than one converting post, sound unit economics and inventory capacity.
2026 pre-BF priorities	153/274 Jan–May videos linked a title observed in 2025 BF; current leaders vary by brand.	Put recurring titles beside new challengers in today's SKU–creator tests.	Current conversion, margin and stock—not last year's visibility by itself.

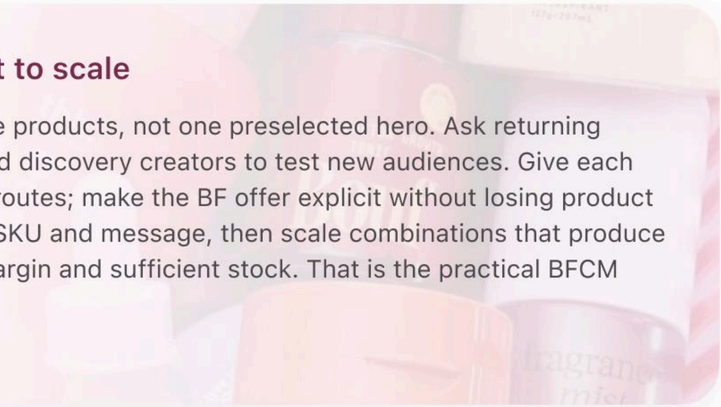
What beauty brands should change in 2026

2025 finding: coordinated shifts

The 2025 BF shift was coordinated rather than uniform. Most BF videos still linked familiar titles, but 18 of 30 brands changed the product receiving the most video links. Returning creators provided 43.4% of BF videos, while nearly two-thirds of distinct brand–creator pairings were newly observed. Event language moved sharply from the October ramp into BF. The winning planning question is therefore not "How many more posts can we buy?" It is "Which product, creator and reason-to-buy combination can we make work repeatedly?"

2026 action: earn the right to scale

For 2026, start with several viable products, not one preselected hero. Ask returning creators to deepen proven fits and discovery creators to test new audiences. Give each priority product distinct creative routes; make the BF offer explicit without losing product proof. Review results by creator, SKU and message, then scale combinations that produce repeatable orders with healthy margin and sufficient stock. That is the practical BFCM decision system.



Methodology and definitions

AFM matched U.S. Gloda product-linked videos for 30 selected beauty brands: Jan–Oct 2025 pre-BF and Nov 20–30 BF. Rows were deduplicated by brand and video ID. Fifty-three Jan–Sep brand-month exports hit a 5,000-row cap; Sep–Oct coverage drops sharply, so counts are not a growth series. Jan–May 2026 is a capped ranked sample: 274 videos across 25 brands, not directly comparable in volume. Product overlap uses normalized exact titles, not SKU IDs; creator overlap uses IDs, not contracts. Caption keywords do not code footage, and Gloda estimates are not verified BF orders.

How to read the evidence

Matched video

A product-linked video counted once by brand and video ID.

Most-linked title

The exact normalized title appearing in the most matched videos—not a verified SKU sales rank.

Estimated units

A Gloda value attached at export, not confirmed orders placed during the BF window.

Illustrative video references

Sylvia / ColourPop

https://www.tiktok.com/@sylviavanhoevenbeauty/video/7577146532529573133

Mikayla Nogueira / NYX

https://www.tiktok.com/@mikaylanogueira/video/7576836199097044254

Shamela / Laneige

https://www.tiktok.com/@klothesminded/video/7576342485685832991

Jackie / Dr. Melaxin

https://www.tiktok.com/@putgodfirst_93/video/7575666082833288479

Yanique / medicube

https://www.tiktok.com/@yannnique/video/7577448747689463071

Treasure Laurent / SKIN1004

https://www.tiktok.com/@treasurelaurent/video/7574854725795941645