

LA MODE
MONTHLY

TRIBE DYNAMICS

MAY 2014

TRIBEDYNAMICS.COM
739 BRYANT ST., SAN FRANCISCO, CA 94110

This is the next installment in our monthly series of reports that will provide a larger picture understanding of trends within the beauty and fashion industries that will help you build effective influencer marketing strategies and boost your brand's ROI.

Utilizing Tribe's proprietary data analytics, we will track which brands and products are creating the most valuable earned media over time, clearly out-performing the competition on a variety of social channels.

The data for this study was collected by Tribe Dynamics and is based upon the top 50,000 influencers in the beauty, fashion, and lifestyle spaces. The brands and products included in each month's study will be those that are most popular based on publicly-available information of these brand's annual revenue, and reviews from consumers and third party retailers.

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THE TOP 10

EARNED MEDIA VALUE LEADER BOARD

For the month of May,

the following ten brands

were the most socially

influential, generating the

most valuable earned

media. This metric is

based upon the following

calculations:

THE NUMBER OF POSTS:

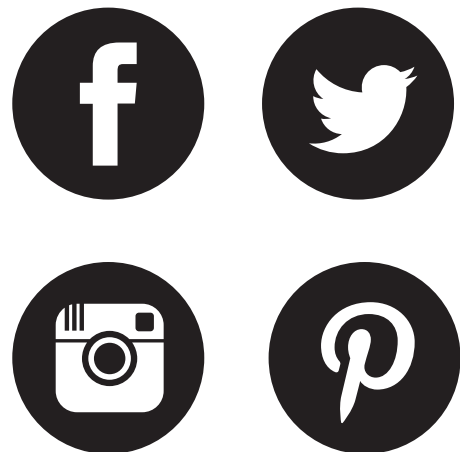
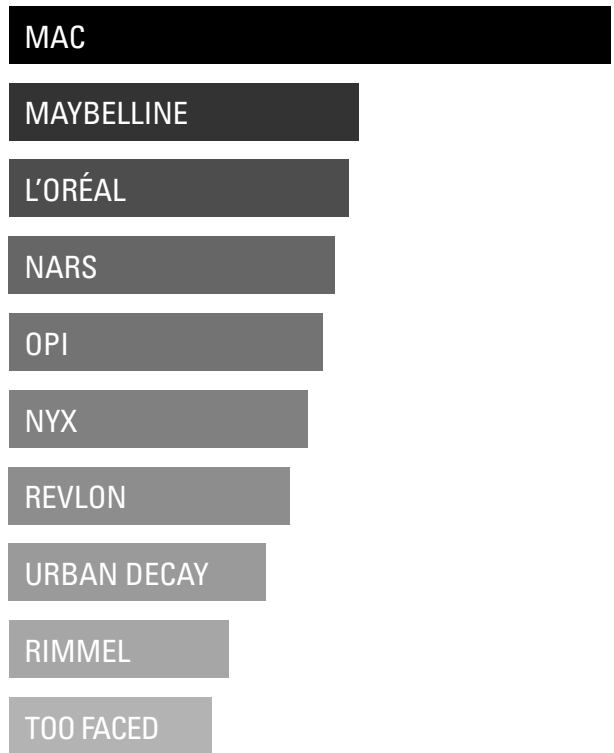
- Blog posts
- YouTube Videos
- Tweets
- Facebook posts
- Instagram posts
- Pinterest Posts

ENGAGEMENT RATE BY:

- Blog views
- Video content views
- Twitter actions
- Facebook and Instagram likes
- Facebook shares
- Instagram comments
- Pinterest likes, comments, & shares

1. MAC \$13,032,339 EMV
2. MAYBELLINE \$5,840,613 EMV
3. L'ORÉAL \$5,465,609 EMV
4. NARS \$5,128,331 EMV
5. OPI \$4,951,641 EMV
6. NYX \$4,638,937 EMV
7. REVLON \$4,144,225 EMV
8. URBAN DECAY \$3,542,472 EMV
9. RIMMEL \$2,968,299 EMV
10. TOO FACED \$2,751,445 EMV

0 1,000,000 6,000,000 13,000,000



THE TOP 10

SOCIAL INFLUENCE BY CHANNEL

The following data
reflects the approximate
value of the content
created about each
brand by social channel
during the month of May,
as measured by Earned
Media Value.

BLOG EMV

MAC

\$1,314,557

REVLON

\$639,275

MAYBELLINE

\$592,600

NARS

\$562,434

OPI

\$450,394

URBAN DECAY

\$435,550

L'ORÉAL

\$351,939

NYX

\$345,790

RIMMEL

\$293,540

TOO FACED

\$281,015

YOUTUBE EMV

MAC

\$4,487,222

MAYBELLINE

\$3,440,562

L'ORÉAL

\$3,158,689

NARS

\$2,932,527

NYX

\$2,642,882

RIMMEL

\$2,050,454

REVLON

\$1,989,545

URBAN DECAY

\$1,909,007

TOO FACED

\$1,260,581

OPI

\$667,327

TWITTER EMV

MAC

\$762,300

OPI

\$297,100

NARS

\$244,700

L'ORÉAL

\$241,600

MAYBELLINE

\$223,400

RIMMEL

\$175,900

TOO FACED

\$166,000

REVLON

\$157,100

NYX

\$98,100

URBAN DECAY

\$94,700



FACEBOOK EMV

MAC

\$2,633,645

OPI

\$1,889,070

L'ORÉAL

\$732,560

URBAN DECAY

\$680,545

REVLON

\$653,735

MAYBELLINE

\$629,110

NARS

\$442,535

TOO FACED

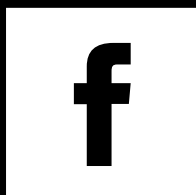
\$432,100

NYX

\$424,750

RIMMEL

\$188,490



INSTAGRAM EMV

MAC

\$3,349,235

OPI

\$1,310,630

NYX

\$1,065,025

L'ORÉAL

\$918,780

NARS

\$832,225

MAYBELLINE

\$814,940

TOO FACED

\$463,740

REVLON

\$533,000

URBAN DECAY

\$302,520

RIMMEL

\$211,335



PINTEREST EMV

MAC

\$485,380

OPI

\$337,120

REVLON

\$171,570

TOO FACED

\$148,810

MAYBELLINE

\$140,000

URBAN DECAY

\$120,150

NARS

\$113,910

NYX

\$62,390

L'ORÉAL

\$62,040

RIMMEL

\$48,980



ANALYSIS

CASE STUDY

MAC'S ROI WITH MALEFICENT COLLABORATION

MAC's strategic partnership with Disney for its live action film Maleficent more than paid for itself in both immediate buzz and long term ROI. The brand's emv was off the charts for the month of May, due to the considerable buzz circulating within the beauty community over the Maleficent makeup collection and looks inspired by the film.

But MAC's success needs to be understood at a much higher level, beyond simply a single month's social influence. The Maleficent campaign serves as an ideal example of the incredible return in brand awareness possible from well aligned partnerships. Using this month's emv data and individual endorsements as a snapshot of the collaboration's larger impact, the following are the clear ways in which MAC has benefited.



1. Increased exposure and visibility: For May, MAC managed to improve upon its monthly emv success as far as overall engagement rates and the number of posts created. Not only were its traditional ambassadors buzzing about the collaboration. The brand also benefited from valuable earned media coming from Disney's top ambassadors.

2. Reach new audiences and new distribution channels: MAC benefited from content being created about the brand by an entirely new segments of influencers, both individuals and publications. It's strong brand message was shared across alternative channels reaching new audiences and generating greater brand awareness.

3. Reinforce positive brand image and associations that bolster loyalty: The vamp, dark look makeup artists chose to transform Angelina Jolie into her Maleficent character perfectly compliments MAC's own dramatic and theatrical aesthetic. The connection is obvious to both the brand's loyal community of followers as well as newcomers, introduced to the brand through the movie.

4. Build stronger emotional connection with audiences through an association with a well loved brand. Disney is one of the most celebrated, well loved brands around; it goes without saying that a collaboration with its brand has great potential. In this case, MAC's partnership with Disney almost certainly expanded perceptions of what audiences, both within the beauty community and outside, think of the beauty brand. The campaign's media showed the dynamic nature of MAC's brand, and its evolving relevance and importance outside of the beauty industry as a marketing powerhouse.

5. Compelling and impressive product packaging and campaign media: MAC also benefited from Disney's sizeable marketing budget. Packaging for the MAC collection was well labeled with the Disney name, along with a Maleficent logo created specifically for the makeup line. There was seemingly no ceiling when it came to digital marketing and advertisements for the film, all of which indirectly served as promotion for MAC's makeup.

Why did MAC's partnership with Disney work so well? For starters, both brand's are leaders within their respective industries. Disney's influence did not overshadow that of MAC's and vice versa. Both also have incredibly strong brands with clear identities and points of difference.

In hindsight, the Maleficent partnership should be recognized not just for the sales it will drive for both MAC's collection and Disney at the box office, but also in terms of increases in online traffic, earned media, and follower count. Both brands had defined parameters for what each hoped to get out of the collaboration, and these were well aligned with the overall strategy and positioning.

“
*MAC'S PARTNERSHIP WITH
DISNEY ALMOST CERTAINLY
EXPANDED PERCEPTIONS
OF WHAT AUDIENCES,
BOTH WITHIN THE BEAUTY
COMMUNITY AND OUTSIDE,
THINK OF THE BEAUTY BRAND.*
”



VISUAL NARRATIVE:

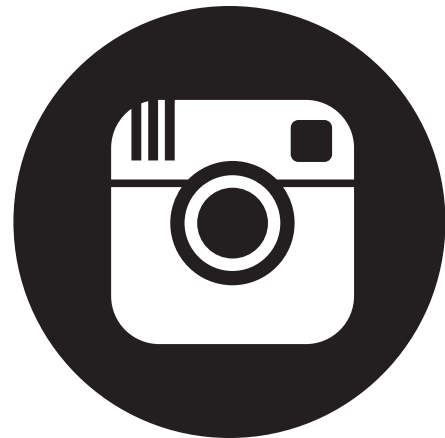
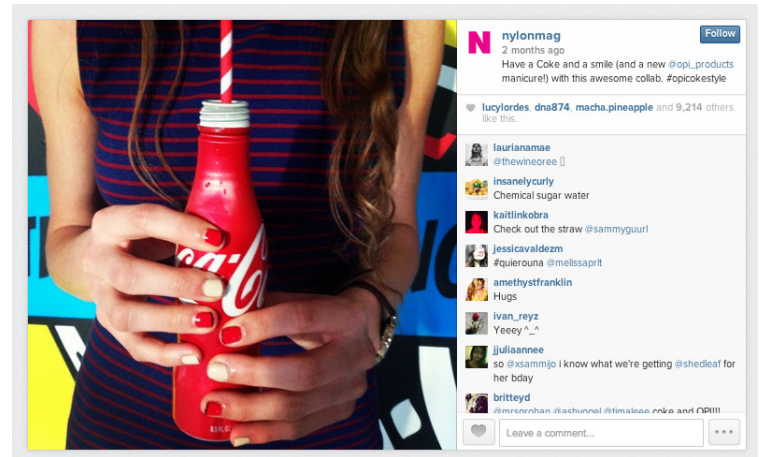
**OPI AND NAIL LACQUER BRANDS
EXCEL ON VISUAL PLATFORMS**

Visual marketing is more and more becoming the preferred form of engagement for both marketers and consumers. Instagram and Pinterest are having their heyday as the social sharing sites heavily relying on visual communication. Photosharing has become the primary way in which followers engage with favorite brands and come to understand a brand's values and identity.

Moreover, brands are able to communicate an incredible amount of information to fans through a single Instagram photo or Pinterest pin. Through these visual mediums, brands can define themselves perhaps even more clearly and succinctly than is possible through written content or alternative forms of media.

This growing trend is even more true for the beauty and fashion industries, where visual storytelling is king, and visual associations or representations fuel greater engagement and encourage user-generated content. OPI and other nail lacquer brands have cultivated the power of visual narrative more so than other brands. Their products and collections are well positioned for photosharing, inspiring fans to create their own nail polish designs and share them with online communities. For OPI, this kind of creative engagement serves as the brand's point of difference.

For May, OPI's new CocaCola collection sparked a large amount of fan photosharing and visual communication. As was the case with MAC and Disney, the collaboration triggered positive emotional associations for OPI fans with another well-loved brand like CocaCola.



“

VISUAL STORYTELLING IS KING

”

THE TOP 10

YOUTUBE BEAUTY VIDEOS IN MAY

This month, we wanted to share the top 10 YouTube videos created by influencers within the beauty community. The value of these videos was determined based on overall engagement rates, measured by views, in addition to the perceived influence of the individual publisher.

Amongst the top videos, were posts from some of the industry's well recognized vloggers including Michelle Phan, Zoella, and missglamorazzi. The content itself ranged from monthly favorites, to hands on tutorials and inspired looks.

Although the subject matter of these videos may seem predictable, these videos serve as a helpful reminder of the importance of relationship building when it comes to meaningful, ongoing engagement. The top videos were not viral in nature, oneoff posts attracting a great deal of immediate, but temporary engagement. Instead, the top ten videos were continuations of the ongoing conversation that each of these vloggers has with her individual online community.

Each of these influencers has built an impressive following of YouTube subscribers, who tune in to watch new videos on a frequent basis, engage with the vlogger, and share their own content. These vloggers have structured calendars for content; subscribers return each month expecting to watch the next month's anticipated "favorites" video or similar equivalent.

Why are these videos in particular valuable to brands, outside of the sheer number of beauty fans viewing them? Their endorsements are the digital equivalent of word of mouth endorsements. The personable and comfortable tone of these videos helps viewers to envision how the product may fit into their own beauty regimen. The tutorialstyle videos provide the same results but from the reverse trajectory. Vloggers recommend products while creating a look, encouraging fans interested in recreating the look to purchase the specific products used.



1. **IGGY AZALEA INSPIRED MAKEUP TUTORIAL**- LAUREN CURTIS, PUBLISHED MAY 29TH: **1,757,648 VIEWS**
2. **CHATTY APRIL FAVORITES**- ZOELLA, PUBLISHED MAY 4TH: **1,578,907 VIEWS**
3. **GRADUATION BEAUTY TIPS + MY SPEECH!**- MICHELLE PHAN, PUBLISHED MAY 10TH: **1,288,667 VIEWS**
4. **WAKE UP WITH ME! LAZY SUMMER DAY ROUTINE**- MISSGLAMORAZZI, PUBLISHED MAY 19TH: **1,128,980 VIEWS**
5. **NATURAL PROM MAKEUP TUTORIAL**- LAUREN CURTIS, PUBLISHED MAY 25TH: **1,087,272 VIEWS**
6. **HOW TO: MILKMAID BRAID UPDO**- ZOELLA, PUBLISHED MAY 14TH: **1,013,540 VIEWS**
7. **BIG BEAUTY HAUL!**- MISSGLAMORAZZI, PUBLISHED MAY 10TH: **904,154 VIEWS**
8. **REACTING TO OLD FACEBOOK PROFILE PICTURES**- TANYA BURR, PUBLISHED MAY 15TH: **867,997 VIEWS**
9. **APRIL FAVORITES 2014!!**- MISSGLAMORAZZI, PUBLISHED MAY 3RD: **866,908 VIEWS**
10. **BEACH PARTY MAKEUP, YUMMY TREATS + DIY DECOR!**- MISSGLAMORAZZI, PUBLISHED MAY 24TH: **785,714 VIEWS**

“
MEANINGFUL, ONGOING ENGAGEMENT.
”

THE TOP 10

ENGAGEMENT BY SOCIAL CHANNEL

The following data

reflects the social

influence of the top ten

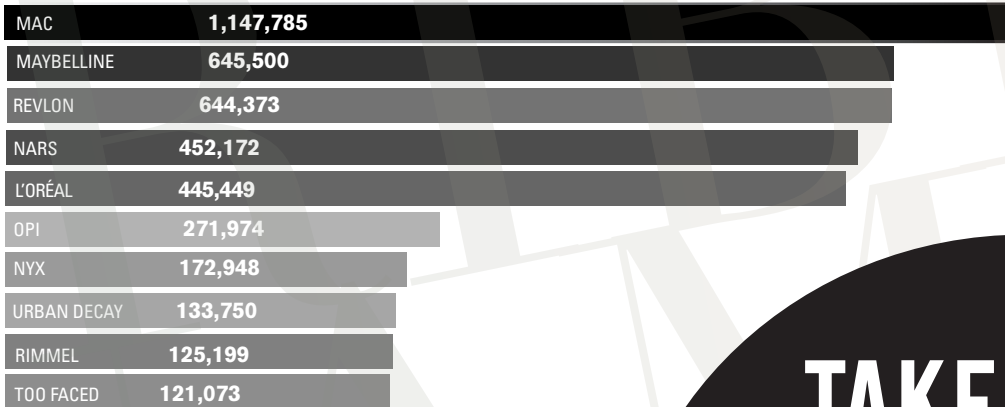
brands by engagement

across social channel for

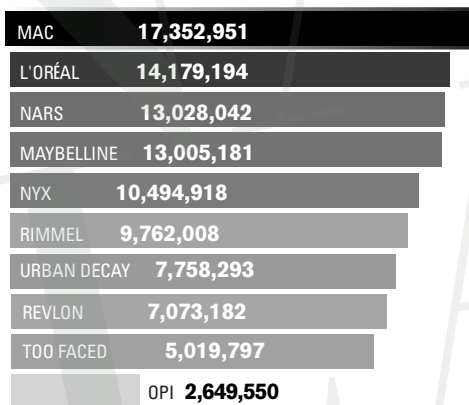
the month of May.

THE TOP 10 - ENGAGEMENT BY SOCIAL CHANNEL

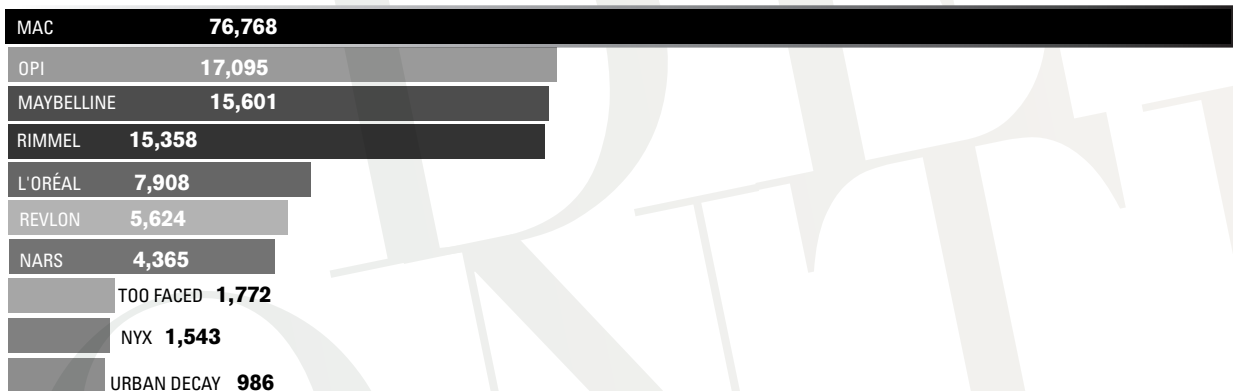
BLOG VIEWS



YOUTUBE VIEWS



TWITTER ACTIONS

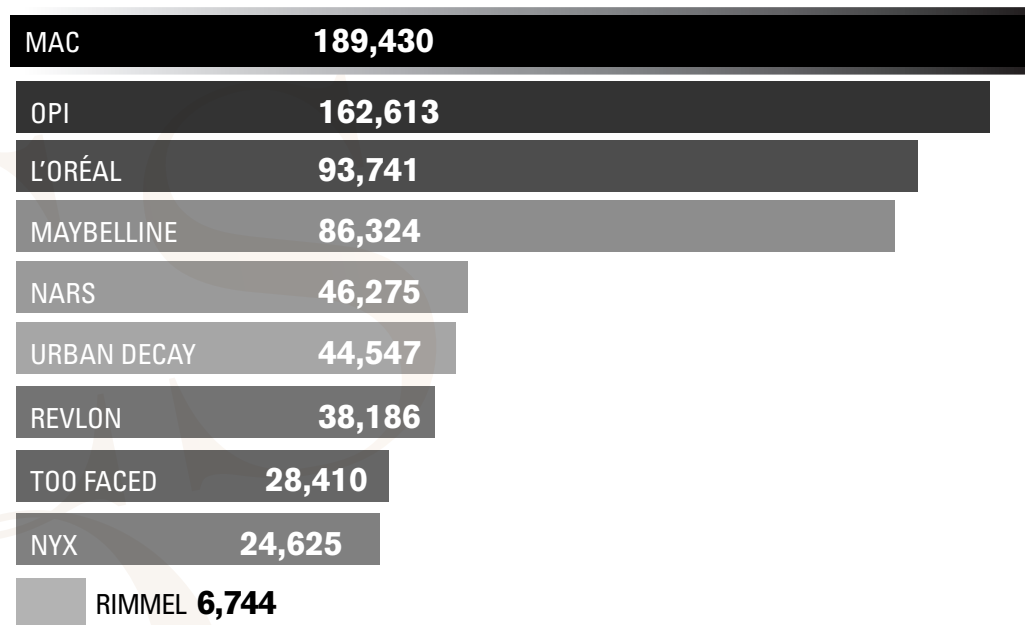


TAKE AWAYS

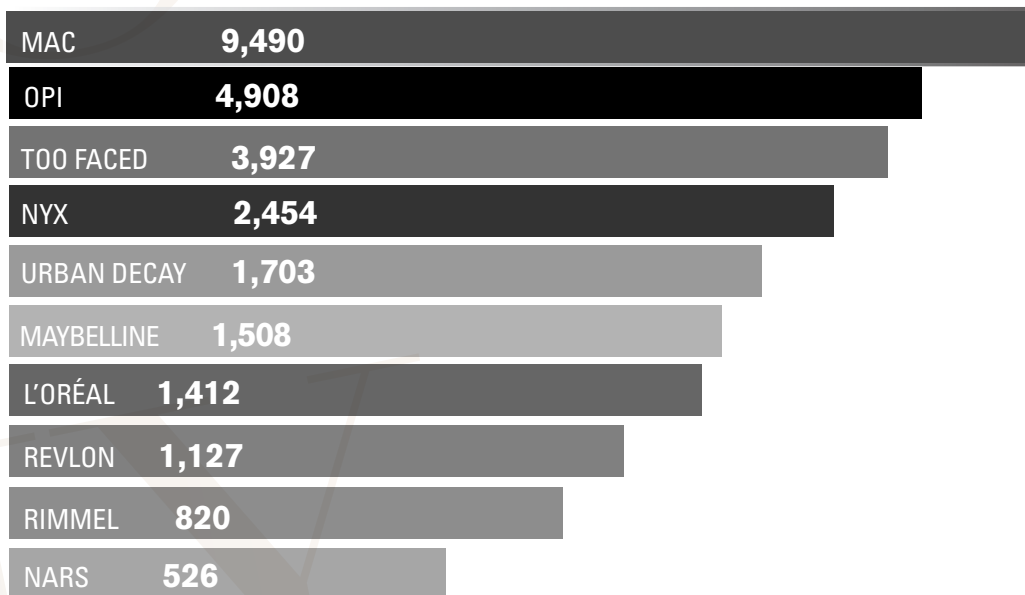
MAC experienced some of its greatest engagement rates yet during the month of May, with the highly anticipated premiere of Disney's liveaction Maleficent and the release of its Maleficent beauty collection. An incredible percentage of the brand's earned media on each channel specifically mentioned the collaboration. Clearly the connection between the film and MAC's point of view as a brand made sense to the larger beauty community, who created content about the collaboration on a viral level.

THE TOP 10 - ENGAGEMENT BY SOCIAL CHANNEL

FACEBOOK LIKES



FACEBOOK COMMENTS

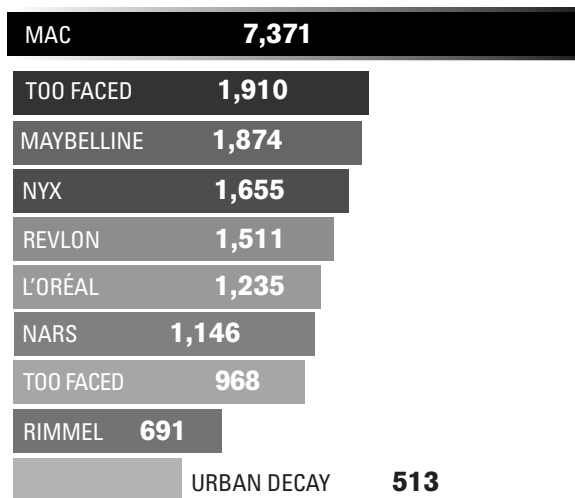


FACEBOOK SHARES

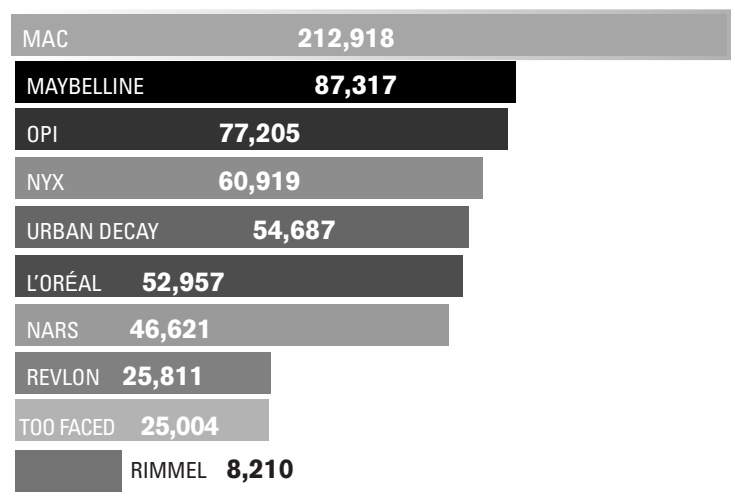


THE TOP 10 - ENGAGEMENT BY SOCIAL CHANNEL

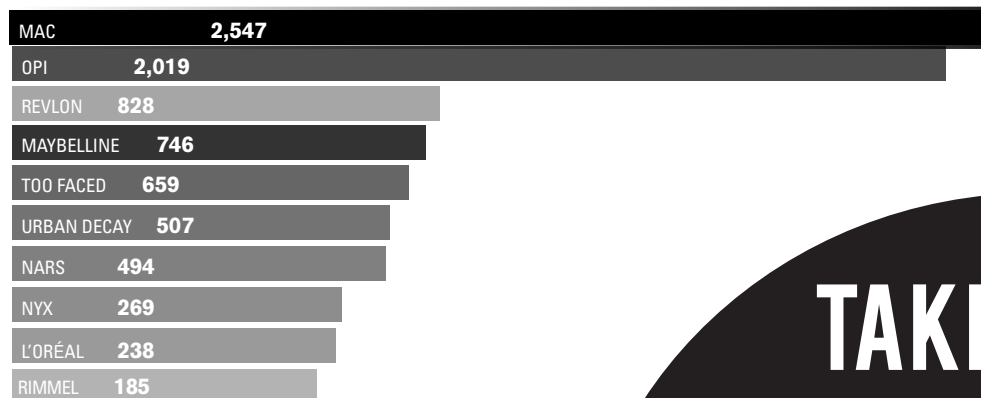
INSTAGRAM COMMENTS



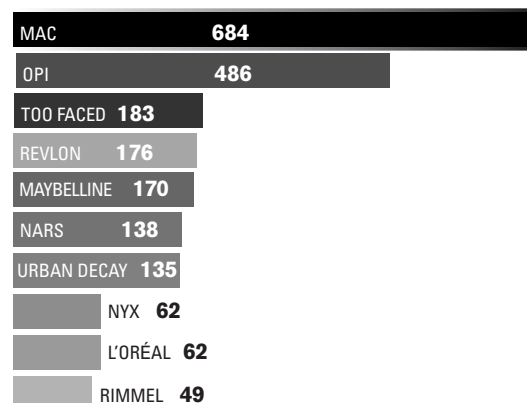
INSTAGRAM LIKES



PINTEREST SHARES



PINTEREST LIKES



TAKE AWAYS

OPI excelled on Facebook and Instagram, but underperformed on YouTube compared to other brands on our leaderboard. Traditionally, nail lacquer brands perform best on visual platforms such as Instagram, yet struggle on YouTube. Instagram photos of polish colors and designs are ideal for engagement; they drive awareness for specific shades or new lines, and can be practically bookmarked for shopping purposes. While the same can be said of Instagram for all cosmetic products in general, YouTube is better suited for beauty tutorials and creating full looks. This month, the brand's success was in part due to the successful launch of its summer CocaCola line.

THE TOP 10

POST COUNT BY SOCIAL CHANNEL

The following data
reflects the social
influence of the top ten
brands by the number
of sheer posts created
about the brand by social
channel for May. These
numbers do not take into
account engagement with
the content itself.

THE TOP 10 - POST COUNT BY SOCIAL CHANNEL

BLOG POSTS

MAC	1,396
REVLON	638
MAYBELLINE	629
NARS	590
URBAN DECAY	511
OPI	495
NYX	389
L'ORÉAL	358
RIMMEL	343
TOO FACED	321

YOUTUBE VIDEOS

MAC	391
MAYBELLINE	272
L'ORÉAL	212
NYX	211
URBAN DECAY	199
REVLON	177
NARS	173
TOO FACED	143
RIMMEL	133
OPI	42

TWEETS

MAC	2,686
REVLON	1,166
L'ORÉAL	1,113
OPI	965
MAYBELLINE	952
NARS	899
TOO FACED	669
RIMMEL	604
NYX	598
URBAN DECAY	482

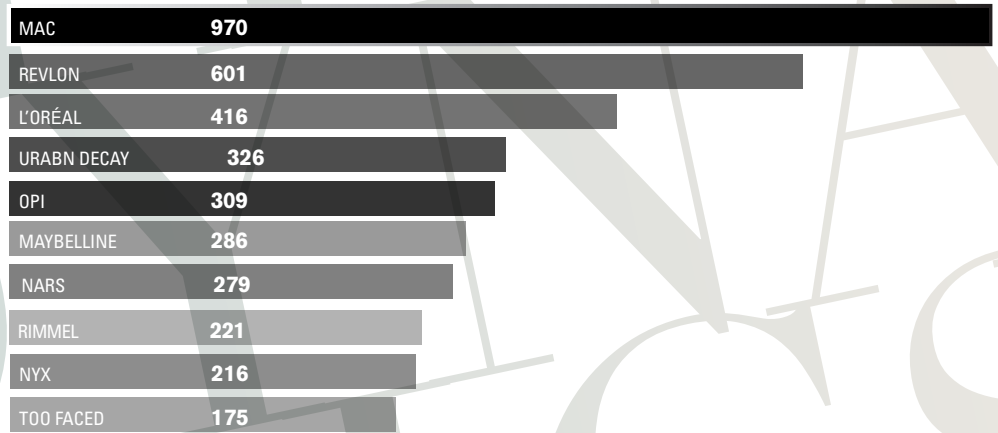
TAKEAWAYS

MAC's dominance this month is visible by the sheer number of posts created about the brand.

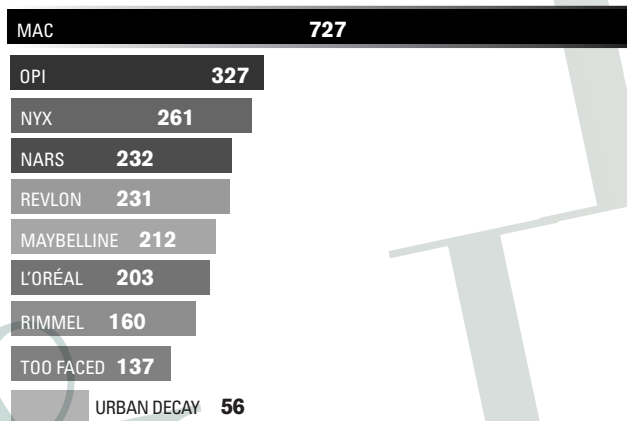
Too Faced made its first appearance in our leaderboard, excelling on Pinterest.

THE TOP 10 - POST COUNT BY SOCIAL CHANNEL

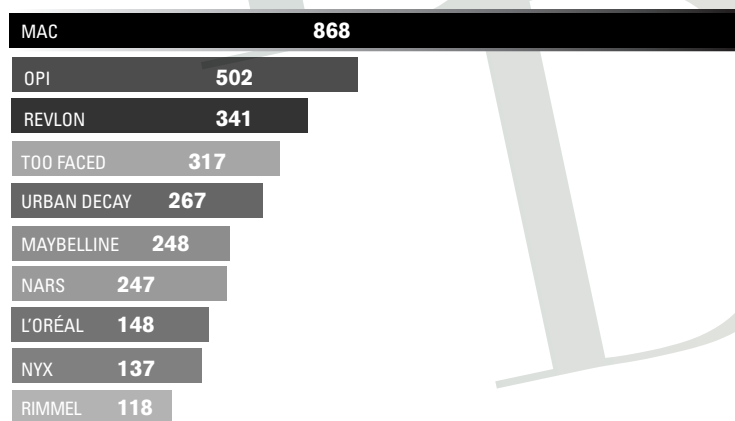
FACEBOOK POSTS



INSTAGRAM POSTS



PINTEREST POSTS



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