

LA MODE  
MONTHLY

TRIBE DYNAMICS

JUNE 2014





*EMV*

Tribe Dynamics' prescribed metric referring to the quantifiable dollar amount assigned to publicity gained through social word- of-mouth marketing accomplishments. Our holistic approach assigns a specific dollar value to each respective form of content based on the perceived value of each to brands within the industry, as it pertains to establishing ongoing relationships with influencers.

*JUNE*

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.

DOWNLOAD REPORTS AT [TRIBEDYNAMICS.COM](https://tribedynamics.com)





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# THE TOP 10

## EARNED MEDIA VALUE LEADER BOARD

For the month of June,  
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:**

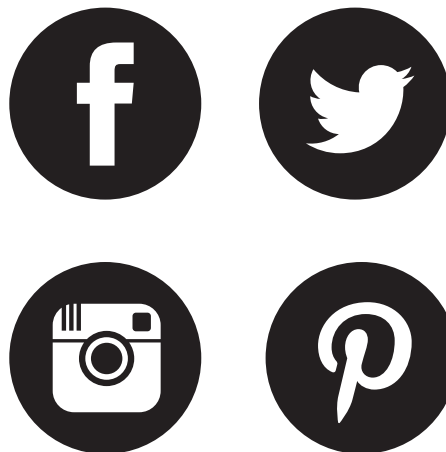
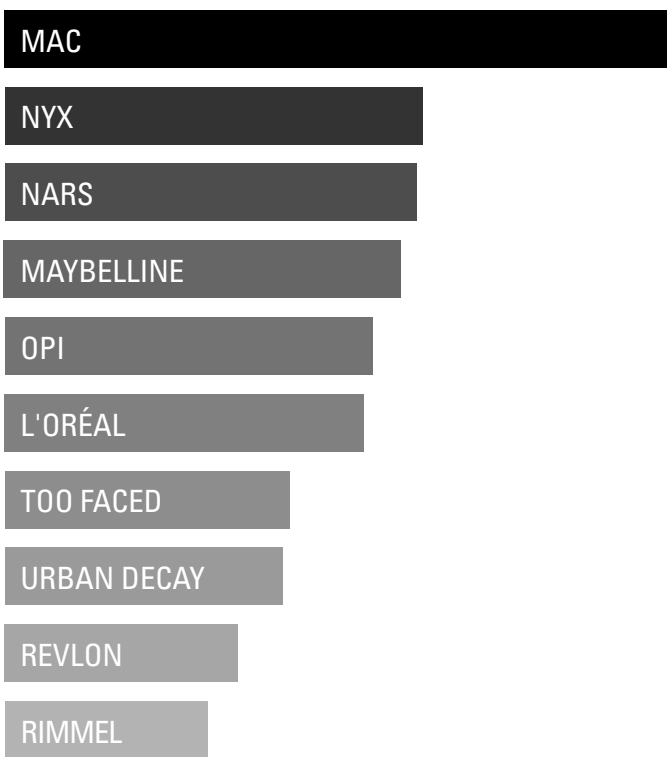
- Blog posts
- YouTube Videos
- Tweets
- Facebook posts
- Instagram posts
- Pinterest Posts

**ENGAGEMENT RATE BY:**

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

1. MAC \$11,439,345 EMV
2. NYX \$6,160,661 EMV
3. NARS \$6,097,690 EMV
4. MAYBELLINE \$5,788,937 EMV
5. OPI \$5,020,742 EMV
6. L'ORÉAL \$5,003,317 EMV
7. TOO FACED \$4,202,876 EMV
8. URBAN DECAY \$4,188,141 EMV
9. REVLON \$3,299,101 EMV
10. RIMMEL \$2,794,458 EMV

0                      1,000,000                      6,000,000                      11,000,000



# 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 June, as  
measured by Earned  
Media Value.

## BLOG EMV

MAC

\$1,371,481

MAYBELLINE

\$690,873

NARS

\$596,619

NYX

\$550,988

REVLON

\$541,662

URBAN DECAY

\$462,964

OPI

\$435,240

L'ORÉAL

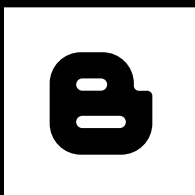
\$336,440

RIMMEL

\$312,145

TOO FACED

\$294,305



## YOUTUBE EMV

MAC

\$6,060,944

NARS

\$3,717,625

NYX

\$2,788,108

L'ORÉAL

\$2,783,973

MAYBELLINE

\$2,718,744

URBAN DECAY

\$2,642,137

OPI

\$2,489,492

RIMMEL

\$2,158,598

REVLON

\$1,676,762

TOO FACED

\$1,666,197



## TWITTER EMV

NARS

\$230,600

OPI

\$229,300

MAC

\$162,900

MAYBELLINE

\$162,100

TOO FACED

\$154,800

L'ORÉAL

\$142,500

URBAN DECAY

\$123,300

NYX

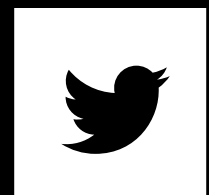
\$121,000

REVLON

\$83,700

RIMMEL

\$51,600



## FACEBOOK EMV

OPI

**\$2,323,145**

MAC

**\$1,709,295**

NYX

**\$948,560**

TOO FACED

**\$832,200**

L'ORÉAL

**\$725,980**

MAYBELLINE

**\$557,610**

URBAN DECAY

**\$504,110**

REVLON

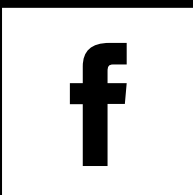
**\$374,520**

NARS

**\$272,260**

RIMMEL

**\$70,185**



## INSTAGRAM EMV

NYX

**\$1,675,355**

MAC

**\$1,630,345**

MAYBELLINE

**\$1,506,490**

OPI

**\$1,360,895**

TOO FACED

**\$1,048,505**

NARS

**\$970,515**

L'ORÉAL

**\$887,675**

REVLON

**\$544,815**

URBAN DECAY

**\$256,600**

RIMMEL

**\$168,270**



## PINTEREST EMV

MAC

**\$504,380**

OPI

**\$432,670**

NARS

**\$310,070**

TOO FACED

**\$206,870**

URBAN DECAY

**\$199,030**

MAYBELLINE

**\$153,120**

L'ORÉAL

**\$126,750**

REVLON

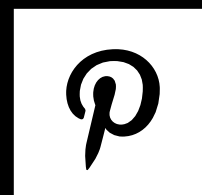
**\$77,640**

NYX

**\$76,650**

RIMMEL

**\$33,660**







# BRAND LOYALTY:

**LOOKING BEYOND REPEAT PURCHASE RATES**

We've spoken at length about the importance of adopting digital marketing practices geared towards building meaningful relationships. Strong brands are not measured by their month over month sales data or the success of a single marketing campaign. The strongest brands within any industry are those that fulfill a promise to consumers; they commit to consistent messages and values, while simultaneously adapting to evolving needs and preferences. Brand loyalty is an accurate reflection of a brand's ability to fulfill its promise.

Within the beauty industry, MAC and NYX Cosmetics share incredibly loyal communities as a result of their efforts to create content that engages followers beyond the sales-driven B to C ethos. Instead, these brands use each interaction with a customer as an opportunity to build meaningful relationships with fans and foster loyalty. MAC has built its extensive base of loyal followers with consistent messaging maintained in the diverse content the brand shares across all platforms. NYX, comparatively smaller, has focused its efforts towards strengthening the loyalty of its fans on Instagram. In June, the brand led in overall EVM for the channel, an impressive feat considering the size of its more established counterparts.

Looking at the commonalities between these brands, we are able to draw the following conclusions about the characteristics that foster loyalty.

1. The brand has a clear personality, beyond aesthetics and themes, that followers relate to on a more intimate level.
2. Followers want to be associated with the brand and their identity (how they see themselves and how they want to be seen by others) is closely aligned with the brand's.
3. Followers have an emotional attachment to the brand beyond a product level.
4. The brand somehow plays an active role in the consumer's life.
5. The consumer in many ways owns the brand, and is implicitly involved in a large portion of branded content creation.

When followers visit the social profiles of MAC or NYX, they are greeted by a much different experience than some of the other top beauty brands. This contrast is perhaps best captured when we compare the Facebook pages of the top brands. As opposed to alternating posts of product photos, advertisements, or promotions, MAC and NYX publish content much in the same way that an individual would. Each brand's stream of posts includes culturally relevant topics, recent experiences, in addition to user-generated content that reinforces brand messages.

The reciprocal relationship that these brands have developed with their followers has allowed them to create some of the largest loyal and active communities. The next frontier of digital innovation will be understanding the consumer on a deeper, more intimate level and anticipating what consumers want next. MAC and NYX are well positioned for continued success.

# LOYALTY

# BRANDS

“

*THE RECIPROCAL*

*RELATIONSHIP THAT THESE*

*BRANDS HAVE DEVELOPED*

*WITH THEIR FOLLOWERS HAS*

*ALLOWED THEM TO CREATE*

*SOME OF THE LARGEST LOYAL*

*AND ACTIVE COMMUNITIES.*

”

# TOO FACED'S BREAKOUT SUCCESS:

**AUTHENTICITY AND BRAND AMBASSADORS**

Word of mouth is still one of the most powerful tools in marketing. As brands within the industry continue to seek out new and innovative marketing strategies, the necessity of having active, well-aligned brand ambassadors should not be overlooked. As Too Faced witnessed this past month on Instagram, endorsements from these individual bloggers can be some of the most valuable earned media when it comes to raising brand awareness.

This month, Too Faced broke into our Top 10, leading in overall Instagram likes. The brand benefited from the activity of one brand ambassador in particular, Dulce Candy, the official beauty blogger of Cosmo for Latinas. Over the course of the month, the blogger was responsible for Too Faced's top six most valuable Instagram endorsements, ranging from 31k to 23k likes per post. These posts included a photo of a large collection of products Too Faced had sent the blogger, closeups of the blogger herself wearing Too Faced products, as well as photos from the blogger's trip to a Too Faced sponsored event in Newport Beach, CA.

By working with an ambassador, not only does Too Faced profit from endorsements coming from a "beauty expert", they are also able to extend their reach beyond their current fanbase, amongst a target community of potential customers. At minimal cost to the brand, extra products sent to the blogger and perhaps some additional perks, Too Faced was able to dramatically increase the scale of earned media being created about its brand.

The virality of these Instagram posts was also due to the apparent authenticity of Dulce Candy's endorsement. Too Faced would arguably not have achieved the same level of influence had they partnered with a blogger not as well-aligned with their brand identity. Dulce Candy's style, aesthetic, and personality as a blogger parallel Too Faced's brand. Her connection to the brand is believable and her youthful fans are appropriate target customers for Too Faced. Her endorsement therefore adds to the authenticity of the brand and its appeal to consumers seeking meaningful engagement.

Similar to brand loyalty, the benefit of working with a brand ambassador is less related to immediate boosts in sales versus meaningful long term engagement. It may be true that consumers viewing an Instagram endorsement from Dulce Candy may not be immediately inclined to purchase Too Faced's makeup. However, the next time one of these consumers is browsing Sephora, the post may trigger a level of comfort and familiarity that will persuade them to choose Too Faced over another brand's product.



**dulcecandy** 2 months ago  
 Best experience I've ever had with a powder foundation. @toofaced Cocoa Powder Foundation w/ an Antioxidant-rich, matte, rose petal finish! I use 'Medium Tan' & 'Tan'. Plus, how cute are the Teddy Bear Brushes?! ☺☺

princessnguyen274, marrium\_free\_palestine, katiegrisell\_ and 31.4k others like this.

sumairaa94  
 Too faced..... Love it

babybebelei  
 @yui\_yun ☺

marionrite  
 Perfect ☺

aceleste7  
 @zazbla they are not made with real animal fur like most brushes so that's why too faced named it 'teddy bear' hair.

bongobeautyfix  
 @anithascloset vizuriiii! Ila Mimi ningesuggest upeleke mzigo china! ☺☺☺ but like really tho...tafuta china!

erika0708

Leave a comment...



**dulcecandy** 2 months ago  
 So many new and exciting products from @toofaced What a lovely surprise when I came back to my room. Thank you!!!!

katiegrisell\_, lydiamcewenn, bano\_9900 and 28.3k others like this.

snowwhite\_beachmama  
 That's just awesome!

bobbysgirl2008  
 @dulcecandy went to try and buy it they said it wasn't out...

bobbysgirl2008  
 @dulcecandy I wanted all of it :)

martabort87  
 I ♥ all this, are an ameing products

bellecandish  
 @c\_landече

parkerlara10  
 Y did they give u like 10 of the same too faced coco powder

stephdn  
 @parkerlara10 probably different shades.

Leave a comment...



**dulcecandy** 2 months ago · Island Hotel Newport Beach  
 Love my @toofaced family! ♥☺☺ #tfcateyes

\_reyna\_nicole\_20, katiegrisell\_, maartennejdbm and 30.8k others like this.

velbeauty  
 Check out my channel love bugs ! ☺

tylena1126  
 Can you do a winged eyeliner tutorial @dulcecandy

noelxo  
 Xoxox. I also have a beauty channel. Please check it out!

lorrainestanick  
 You look stunning!

jumois  
 Dulce! You are my inspiration!

wera997  
 pretty

dulcelala20  
 lly

ayy\_im\_alicia  
 llysm ur vids on YouTube r amazing

Leave a comment...

# THE TOP 5

**INSTAGRAM POSTS IN JUNE**



Similar to last month's Top 10 YouTube videos, for June, the following Instagram posts were five of the most valuable created by influencers within the beauty community. The value of these posts is based on overall engagement rates, measured by likes and comments, in addition to the perceived influence of the individual publisher.

Of the top 5, four came from the Instagram profiles of well-recognized beauty bloggers, and one from an industry publication, Teen Vogue. The content and subject matter of the top 5 posts varied, demonstrating the multiple avenues for meaningful engagement the channel offers. Content ranged from photos of finalized makeup looks and the makeup application process, to brand ambassador selfies, and product close-ups.

What is most interesting about this collection of posts is that each offered viewers an opportunity for further engagement beyond the individual post, with some form of a call to action. The four beauty bloggers shared links to updated blog posts, new videos, reviews of new products, as well as opportunities to meet them in person. Teen Vogue took the sweepstakes approach to command attention and drive engagement, posting a photo of OPI's Coca-Cola collection and calling for followers to "regram" (repost) the photo for a chance to win the entire collection.

Herein lies the appeal of Instagram to marketers as a platform for outreach and building online communities. Done well, a single post can quickly catch the attention of a consumer, express clear brand aesthetics, while also providing viewers a reason to engage with the brand at a future date. Instagram posts provide an attractive balance of visual intrigue and information sharing, without demanding too much of the viewer's time and attention span, the way a long blog post or video might. For highly visual industries like beauty and fashion, and in the age of immediate gratification, brands will not regret investing more time and resources towards developing a compelling Instagram strategy.

\*Posts included in the top 5 are those that were the most valuable, with the greatest individual emv, based on the reach of the specific Instagram profile in addition to engagement rates with the post. Although Too Faced led in overall engagement rates for June, the brand's Instagram emv tended to be more spread out amongst a larger number of influencers.

*DONE WELL, A SINGLE POST CAN QUICKLY CATCH THE ATTENTION OF A CONSUMER, EXPRESS CLEAR BRAND AESTHETICS, WHILE ALSO PROVIDING VIEWERS A REASON TO ENGAGE WITH THE BRAND AT A FUTURE DATE.*

**URBAN DECAY**

**BEAUTYBABY44**

**430,595 followers, 1,423 posts**

**OP1 \$243,705**

**TEENVOGUE**

**766,122 followers, 2,702 posts**

**NARS AND URBAN DECAY**

**TENIPANOSIAN**

**168,468 followers, 509 posts**

**MAYBELLINE**

**FASHIONISTA804**

**225,981 followers, 498 posts**

**MAC \$138,045**

**MAKEUPBYTIFFANYD**

**385,924 followers, 1,461 posts**

# THE TOP 10

**ENGAGEMENT BY SOCIAL CHANNEL**

The following data  

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reflects the social  

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influence of the top ten  

---

brands by engagement  

---

across social channel for  

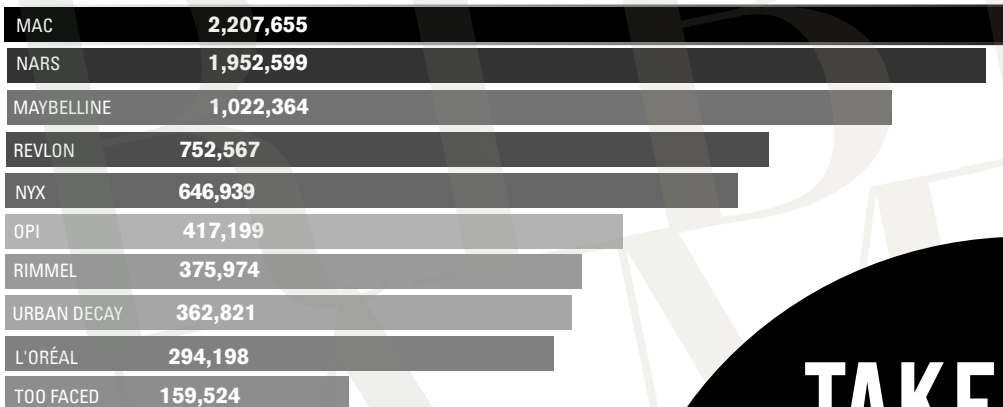
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the month of June.  

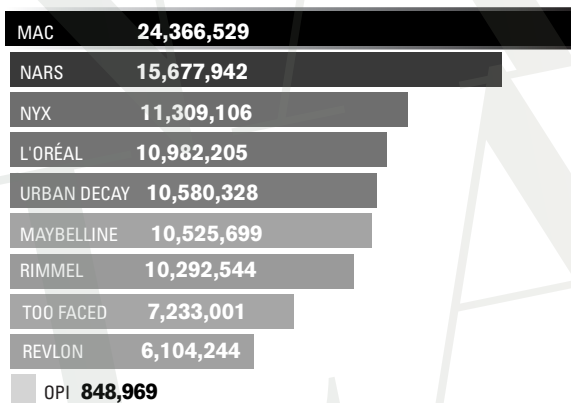
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## THE TOP 10 - ENGAGEMENT BY SOCIAL CHANNEL

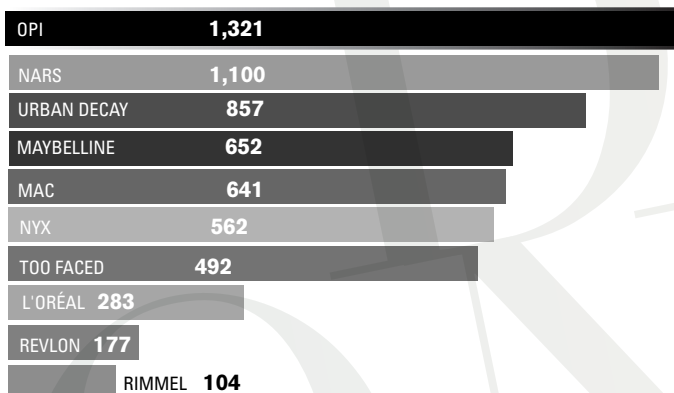
### BLOG VIEWS



### YOUTUBE VIEWS



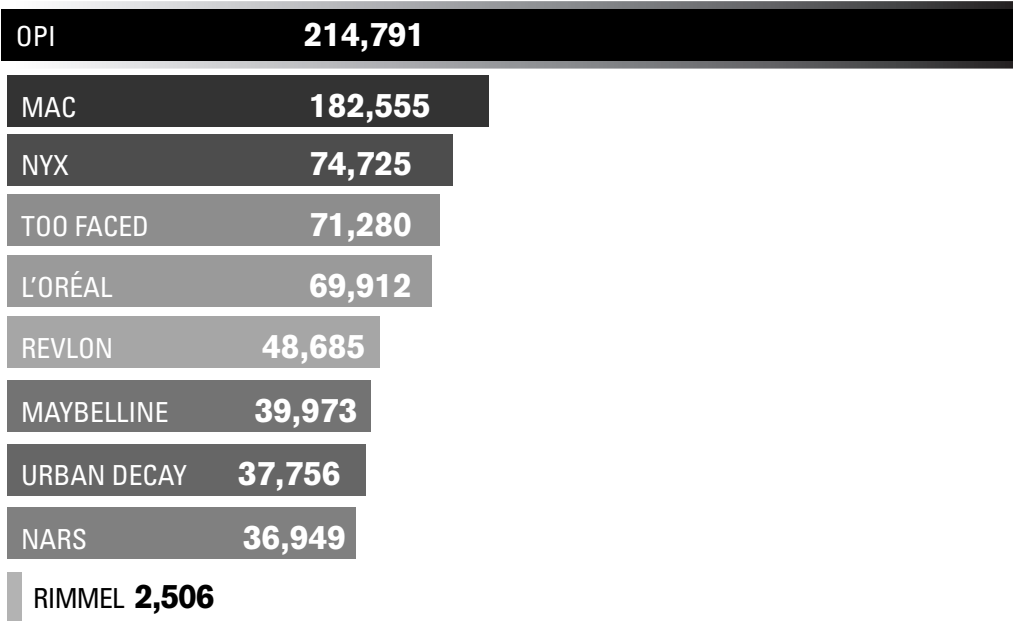
### TWITTER ACTIONS



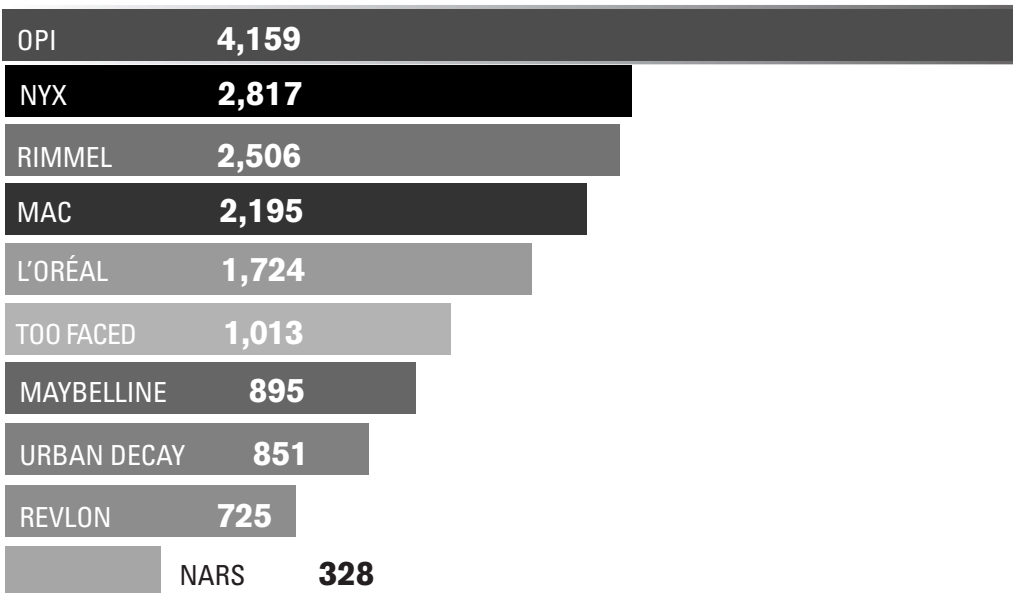
## TAKEAWAYS

MAC posted impressive engagement rates, enjoying a nice social media honeymoon from its successful Maleficent collaboration with Disney. The brand's summer collections were also a main source of buzz over the month. It's online community embraced the brand's Alluring Aquatic collection with enthusiasm on Instagram and Twitter. The brand was also mentioned in more blog posts related to summer beauty looks and trends than any other brand during June.

## FACEBOOK LIKES



## FACEBOOK COMMENTS



## FACEBOOK SHARES

OPI  
8,130

MAC  
4,632

L'ORÉAL  
2,586

NYX  
2,198

REVLON  
1,843

URBAN DECAY  
1,477

NARS  
694

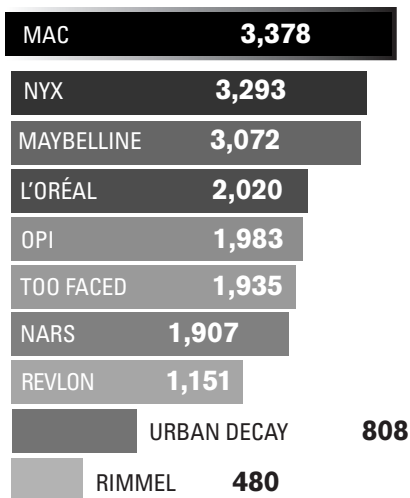
MAYBELLINE  
596

TOO FACED  
391

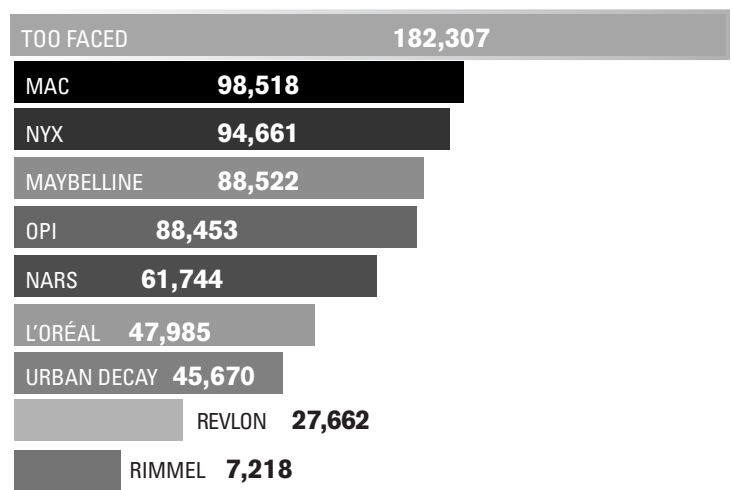
RIMMEL  
86

## THE TOP 10 - ENGAGEMENT BY SOCIAL CHANNEL

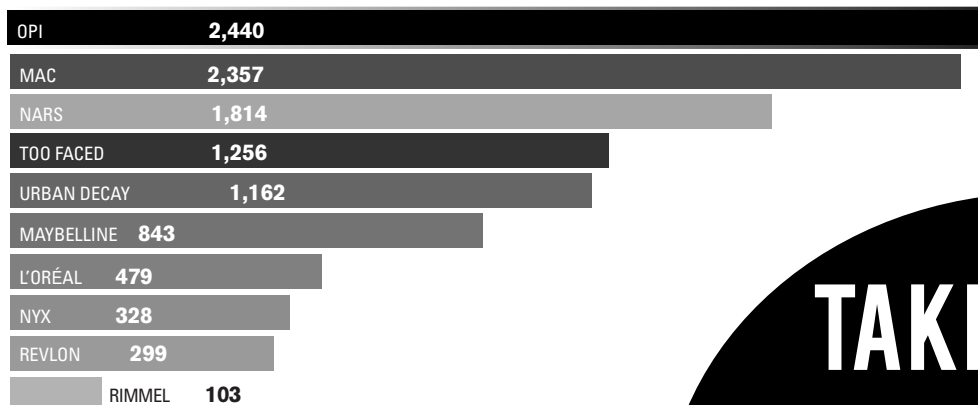
### INSTAGRAM COMMENTS



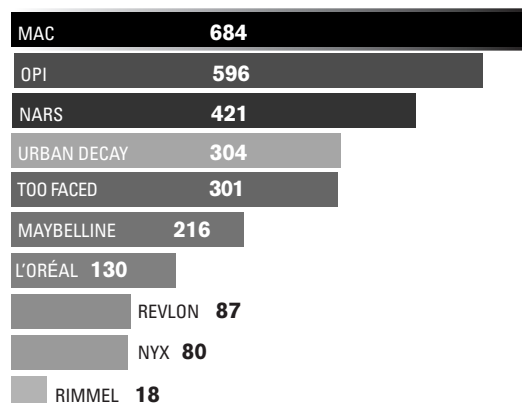
### INSTAGRAM LIKES



### PINTEREST SHARES



### PINTEREST LIKES



## TAKE AWAYS

Too Faced led in total number of Instagram likes, driving incredible engagement rates through posts from loyal brand ambassadors. One fashion and beauty blogger in particular, Instagram screen name "dolcecandy", generated some of the most valuable posts for the brand, three of which averaged 30k likes. One of these posts included a photo the blogger had taken of a massive collection of free products provided by Too Faced.

# 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 June. These numbers do not take into account engagement with the content itself.

## THE TOP 10 - POST COUNT BY SOCIAL CHANNEL

### BLOG POSTS

MAC	1,234
NARS	612
MAYBELLINE	608
NYX	527
REVLON	489
URBAN DECAY	488
OPI	442
L'ORÉAL	347
TOO FACED	328
RIMMEL	316

### YOUTUBE VIDEOS

MAC	457
MAYBELLINE	293
NYX	234
URBAN DECAY	229
L'ORÉAL	219
NARS	183
REVLON	152
RIMMEL	134
TOO FACED	112
OPI	29

### TWEETS

NARS	1,206
L'ORÉAL	1,142
TOO FACED	1,056
MAC	988
OPI	972
MAYBELLINE	969
REVLON	660
NYX	648
RIMMEL	412
URBAN DECAY	376

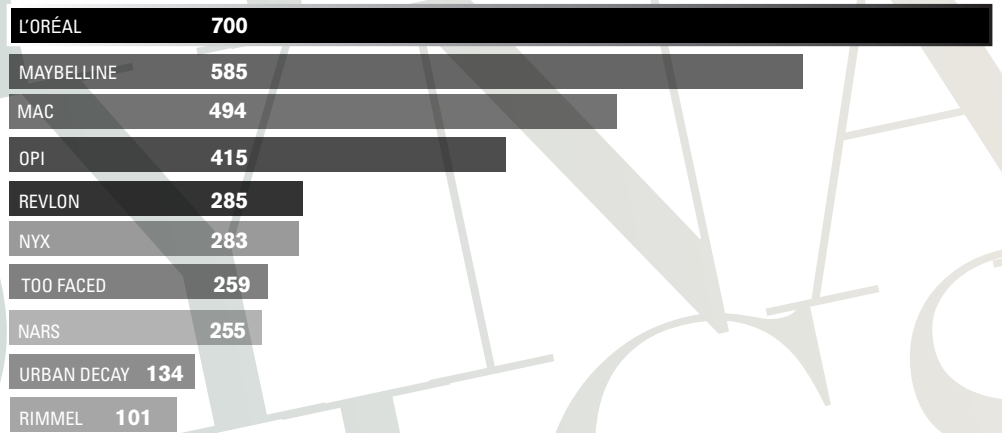
## TAKEAWAYS

MAC continues to inspire the greatest number of posts on those channels best positioned for meaningful engagement. By contrast, L'Oréal led in post count on Facebook, yet a majority of the posts were more advertorial in nature and arguably less valuable to the brand as earned media.

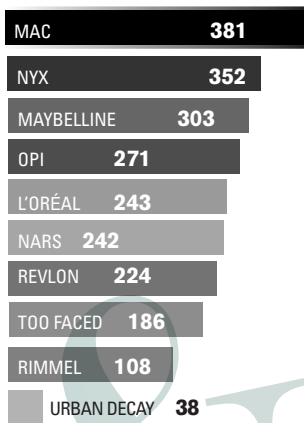
NYX came second in overall Instagram posts for June. The brand continues to excel on the channel, relying on it as one of the primary platforms for social engagement with its community. Despite its impressive engagement rates on Instagram, Too Faced fell towards the bottom of the top 10 brands in overall post count for the channel. This speaks to the value and influence of the few viral posts the brand received from its loyal brand ambassadors.

## THE TOP 10 - POST COUNT BY SOCIAL CHANNEL

### FACEBOOK POSTS



### INSTAGRAM POSTS



### PINTEREST POSTS

