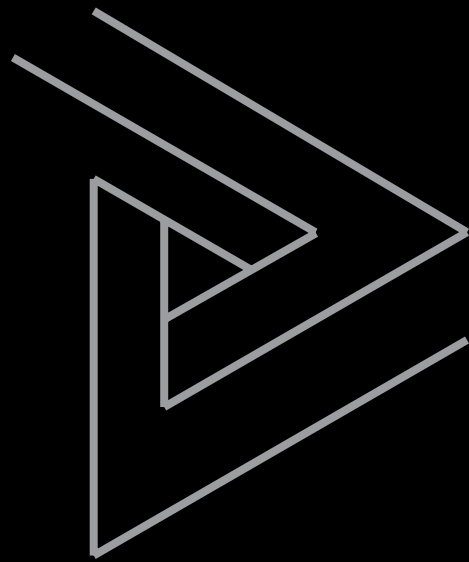


LA MODE
MONTHLY

TRIBE DYNAMICS

JULY 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.

JULY

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 July,
the following ten brands
were the most socially
influential, generating the
most valuable earned
media. This metric is
based upon the following
calculations:

THE TOP 10 - EARNED MEDIA VALUE LEADER BOARD

THE NUMBER OF POSTS:

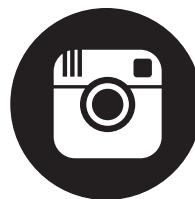
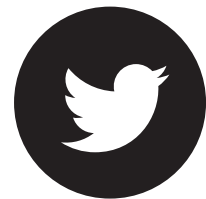
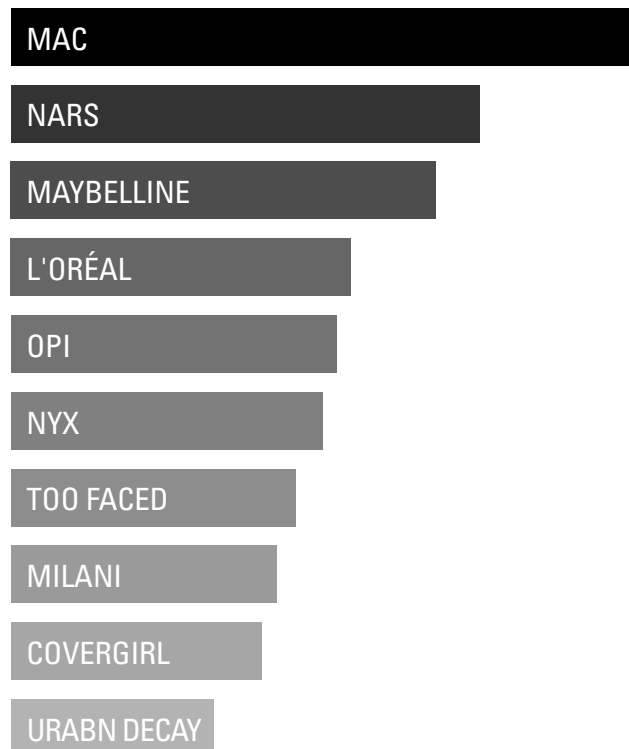
- Blog posts
- YouTube Videos
- Tweets
- Facebook posts
- Instagram posts
- Pinterest Posts

ENGAGEMENT RATE BY:

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

1. MAC \$10,057,165 EMV
2. NARS \$7,474,433 EMV
3. MAYBELLINE \$6,136,805 EMV
4. L'ORÉAL \$5,869,790 EMV
5. OPI \$5,458,602 EMV
6. NYX \$5,426,760 EMV
7. TOO FACED \$5,004,296 EMV
8. MILANI COSMETICS \$4,913,814 EMV
9. COVERGIRL \$4,036,800 EMV
10. URBAN DECAY \$3,950,408 EMV

0 2,000,000 6,000,000 10,000,000



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 July,
as measured by Earned
Media Value.

BLOG EMV

MAC

\$1,416,924

MAYBELLINE

\$827,339

NARS

\$722,428

URBAN DECAY

\$587,474

NYX

\$459,220

L'ORÉAL

\$396,945

OPI

\$387,025

COVERGIRL

\$333,775

TOO FACED

\$280,585

MILANI

\$244,200

YOUTUBE EMV

MAC

\$5,437,222

NARS

\$3,529,464

MAYBELLINE

\$2,769,431

URBAN DECAY

\$2,536,184

TOO FACED

\$2,307,727

L'ORÉAL

\$2,285,044

NYX

\$1,874,330

COVERGIRL

\$1,484,215

MILANI

\$1,044,119

OPI

\$525,857

TWITTER EMV

L'ORÉAL

\$299,300

TOO FACED

\$230,900

NARS

\$228,000

COVERGIRL

\$168,600

MAC

\$166,600

MAYBELLINE

\$145,500

MILANI

\$137,100

OPI

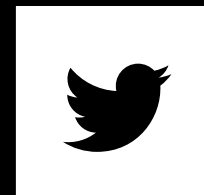
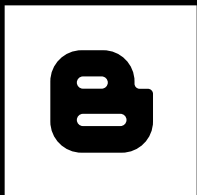
128,400

NYX

\$91,700

URBAN DECAY

\$66,800



FACEBOOK EMV

OPI

\$2,863,950

MILANI

\$1,359,610

MAC

\$1,332,775

L'ORÉAL

\$1,352,695

NARS

\$1,063,115

COVERGIRL

\$1,010,615

MAYBELLINE

\$803,970

TOO FACED

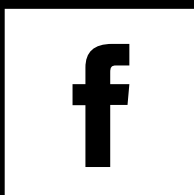
\$584,890

NYX

\$530,510

URBAN DECAY

\$445,280



INSTAGRAM EMV

NYX

\$2,380,890

MILANI

\$1,925,115

NARS

\$1,488,565

L'ORÉAL

\$1,432,965

MAYBELLINE

\$1,359,355

MAC

\$1,344,135

OPI

\$1,237,930

TOO FACED

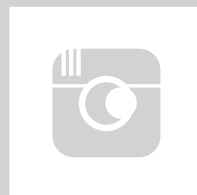
\$1,170,490

COVERGIRL

\$992,085

URBAN DECAY

\$114,280



PINTEREST EMV

NARS

\$442,860

TOO FACED

\$430,080

MAC

\$359,510

OPI

\$315,440

MAYBELLINE

\$231,210

MILANI

\$203,670

URBAN DECAY

\$200,390

L'ORÉAL

\$102,840

NYX

\$90,110

COVERGIRL

\$47,510



AMBASSADOR PROGRAMS:

THE GIFT THAT KEEPS ON GIVING

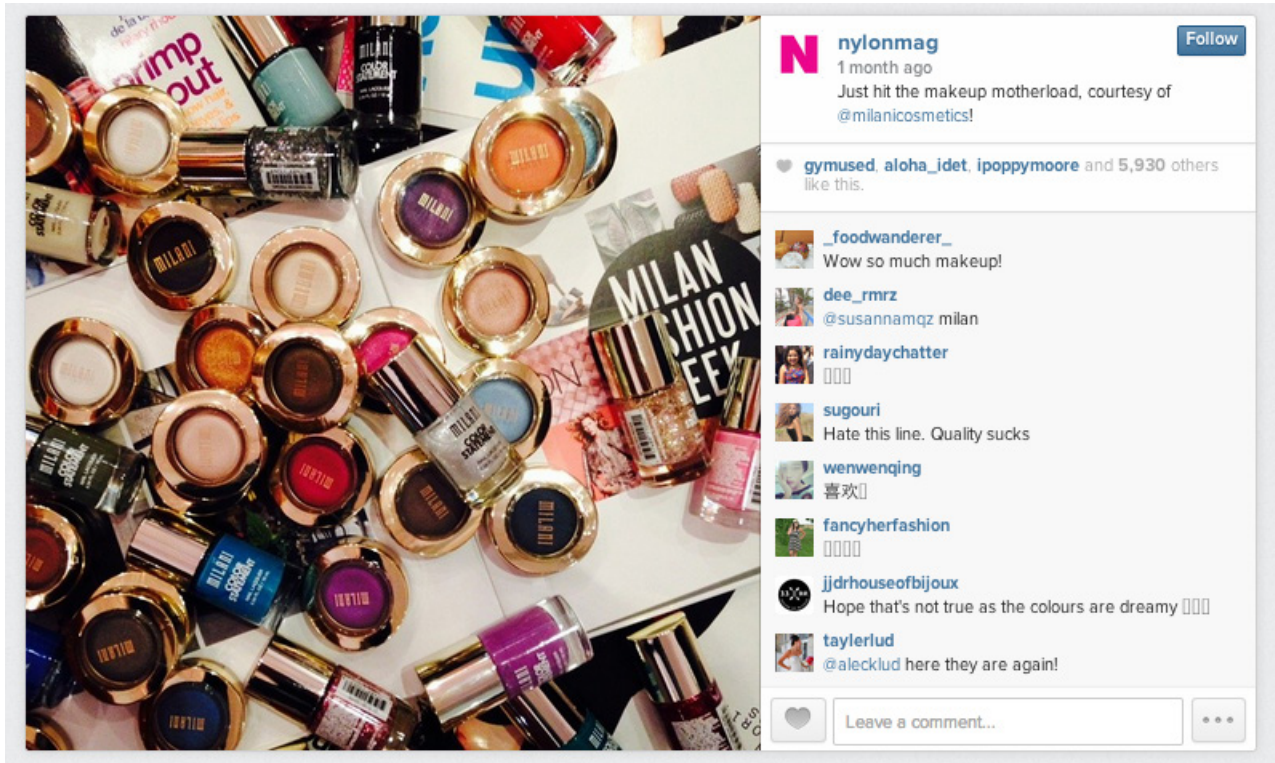
Milani Cosmetics' presence in our July Top 10 was not by accident. The brand excelled in earned media performance for the month as a result of a collection of valuable posts created on Instagram and Facebook, after the brand had sent select beauty ambassadors a generous supply of Milani products. The mass-market brand targeted some of the more influential color makeup ambassadors, in addition to sending Nylon Magazine a "motherload" of free product according to the publication's Instagram post.

These kinds of ambassador programs, or "product seeding", are attractive to marketers looking to maximize earned media at minimal cost to the brand. Between just four of the beauty influencers Milani sent products, their resulting Instagram posts thanking and tagging the brand, generated over 43,000 likes. While fifty eyeshadows or 100 nail polish shades may be a trivial expense to brands, these influencers perceive the products at a greater value based on retail prices.

Aside from being cost-effective, ambassador programs inspire incredibly authentic endorsements. The genuine excitement present in these posts is relatable, and gives consumers a sense of comfort and reassurance attached to their perception of the brand. From authenticity comes trust, and finally loyalty and advocacy. This kind of emotional branding is prominently featured in marketing expert Ted Rubin's concept of RonR (Return on Relationship), an argument stating that brands should be focused above all else on fostering meaningful, long term relationships with consumers. According to last year's Neilsen Global Trust Survey, ninety-two percent of consumers now say they trust earned media (word-of-mouth) above all other forms of advertising. In other words, authenticity and trust weigh heavily in the decision process of the modern day consumer.

This could not be more true than for the beauty consumer, for whom authenticity and transparency play a significant role when choosing a specific brand's product. Selection is very much a process of self-reflection by which consumers align themselves with a brand's personality. Transparent branding with product packaging, the look, feel, touch of a product, validates the perceived authenticity of a brand's personality. This is where ambassador programs become incredibly useful; they create a meaningful brand experience based on transparency. A brand sends a makeup expert, with a trained eye for quality, a large collection of free products to handle and test. The authenticity of her brand experience is twofold. First, the genuine emotion she feels upon discovering the package and the free products. Second, the transparency of working with a variety of the brand's products herself. Her post, thanking the brand, will reflect both forms of authenticity and will be all the more convincing of as an endorsement.

There is no doubt that Milani enjoyed an ample boost in earned media performance this month as a result of the authenticity they established for their brand with ambassador programs. If the brand continues to use these programs, and take RonR to heart, they may be an up-and-coming brand to watch in the next couple of months.



“ ASIDE FROM
BEING COST-EFFECTIVE,
AMBASSADOR PROGRAMS
INSPIRE INCREDIBLY
AUTHENTIC ENDORSEMENTS ”

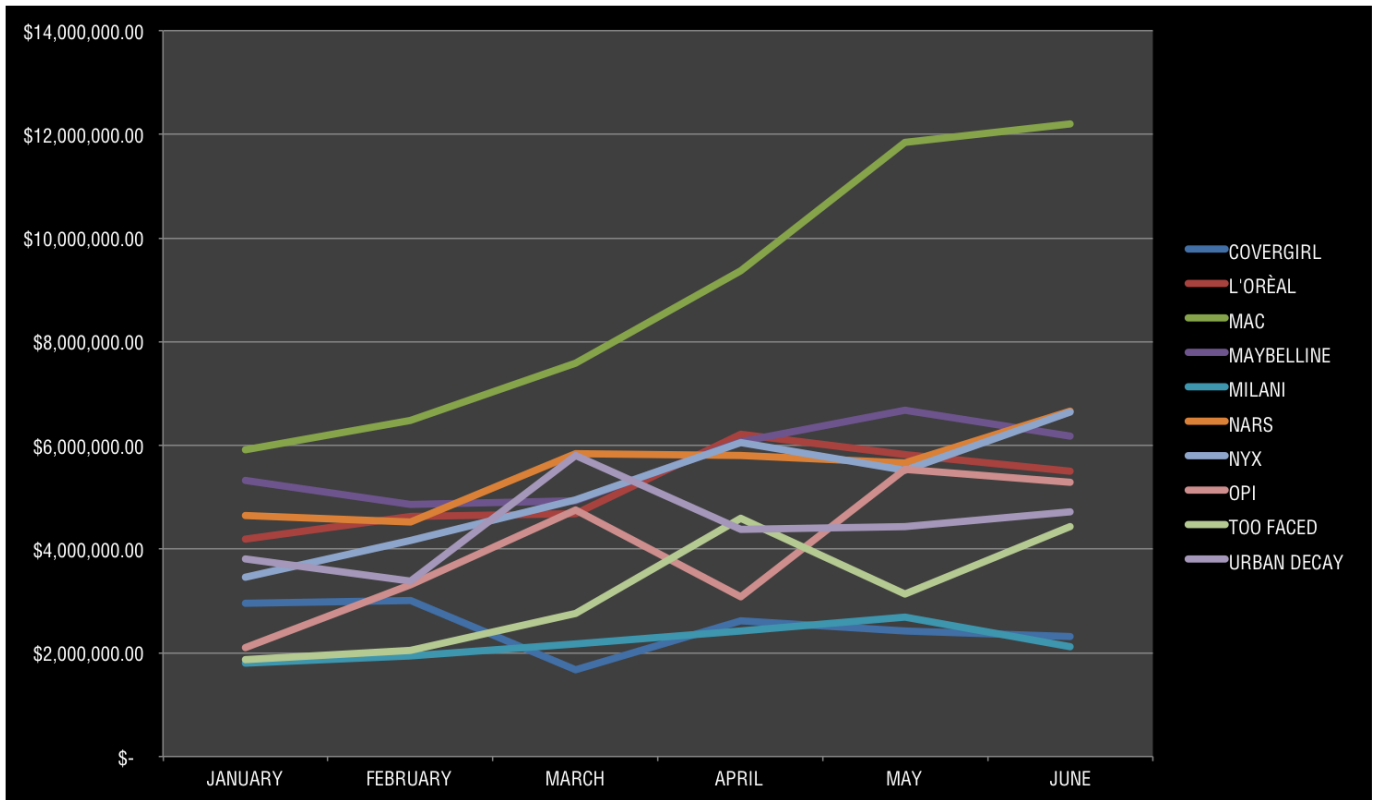
DATA DRIVEN STORYTELLING:

PART I

TRENDING EARNED MEDIA PERFORMANCE, EMV

OVERALL TRENDING EMV

The following data highlights the trending EMV performance of this month's Top 10 brands over the past six months (Q1-Q2).



	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	PERCENTAGE CHANGE
COVERGIRL	\$2,952,968.05	\$3,004,689.05	\$1,669,038.25	\$2,618,041.40	\$2,427,982.75	\$2,309,094.80	-22%
L'ORÉAL	\$4,193,781.75	\$4,639,387.30	\$4,681,025.75	\$6,223,645.45	\$5,824,154.05	\$5,503,085.85	31%
MAC	\$5,917,022.20	\$6,477,292.60	\$7,581,664.75	\$9,362,774.85	\$11,844,469.70	\$12,193,757.40	106%
MAYBELLINE	\$5,325,177.70	\$4,861,912.90	\$4,938,256.80	\$6,069,136.15	\$6,681,243.75	\$6,179,262.85	16%
MILANI	\$1,801,356.50	\$1,947,903.30	\$2,179,802.75	\$2,428,633.50	\$2,682,973.30	\$2,126,799.75	18%
NARS	\$4,653,719.75	\$4,516,210.80	\$5,848,844.90	\$5,815,558.90	\$5,661,027.65	\$6,667,696.05	43%
NYX	\$3,459,040.50	\$4,167,086.30	\$4,957,909.80	\$6,062,250.35	\$5,525,729.35	\$6,636,797.55	92%
OPI	\$2,100,833.50	\$3,317,469.55	\$4,753,689.75	\$3,075,898.50	\$5,537,338.80	\$5,291,172.35	152%
TOO FACED	\$1,869,285.50	\$2,047,756.40	\$2,761,299.05	\$4,599,014.50	\$3,130,918.35	\$4,435,991.30	137%
URBAN DECAY	\$3,812,096.80	\$3,376,721.60	\$5,811,253.00	\$4,376,949.05	\$4,436,303.75	\$4,718,309.70	24%

GREATEST MONTH-OVER-MONTH IMPROVEMENTS:

COVERGIRL: JUNE TO JULY (75%)

MILANI: JUNE TO JULY (131%)

OPI: APRIL TO MAY (80%)

GREATEST MONTH-OVER-MONTH DEPRECIATION:

COVERGIRL: FEBRUARY TO MARCH (-44%)

OPI: MARCH TO APRIL (-35%)

TOO FACED: APRIL TO MAY (-32%)

GREATEST IMPROVEMENT Q1 TO Q2 (JAN EMV VS JUNE EMV)

OPI: 152%

LARGEST DEPRECIATION Q1 TO Q2 (JAN EMV VS JUNE EMV)

COVERGIRL: -22%

Although this is just a snapshot of the influence these brands generated over the past six months, the data shows a pattern worth giving additional attention. From the beginning of Q1 through the end of Q2, four of the five brands with the greatest overall improvement were prestige brands. The only exception however, NYX Cosmetics, more closely resembles a MAC or NARS than a CoverGirl with its digital marketing strategy. These brands have led the industry with innovative marketing initiatives, from MAC's omnichannel presence and strategic partnerships with brands like Disney, to NYX's Instagram-centric digital strategy.

Meanwhile, the larger mass market brands did not show nearly the same improvement and some even showed signs of diminishing earned media performance. This dichotomy in earned media performance between the two sectors speaks to the period of significant transition that the beauty industry has entered. While the divide may not be as clean-cut as prestige versus mass, brands that fail to evolve their marketing practices with technological innovation, instead relying solely on their established reputations will continue to lose traction in both online influence and offline sales. Again, while these trending numbers provide just a brief glimpse, they hint towards a compelling story about the direction of the beauty industry.

DATA DRIVEN STORYTELLING:

PART II

TRENDING EARNED MEDIA TERMS

The following earned media terms represent some of the words or phrases most frequently associated with each respective brand from July's Top 10 online during the month of July. We've included some of the most commonly used single words along with brand-related phrases.

1. MAC: "tutorial" ; MAC Sharon Osbourne Collection [collection]

2. NARS: "Phyrra" ; NARS Fall [collection]

3. Maybelline: "love" ; Maybelline the Nudes [product]

4. L'Oréal: "free" ; L'Oréal Visible lift [product]

5. OPI: "nailart" ; OPI Nordic Collection [collection]

6. NYX: "lipstick" ; nyxcosmetics eyebrow gel [product]

7. Too Faced: "look" ; Too Faced Cat Eyes Palette [product]

8. Milani: "swatches" ; Milani Bella Eyes Gel [product]

9. CoverGirl: "free" ; CoverGirl Instaglam [collection]

10. Urban Decay: "look" ; Urban Decay Pulp Fiction Collection [collection]

SINGLE WORDS:

- The single words most commonly associated with the top three prestige brands all implied an active form of engagement beyond a product level, including "tutorial", "Phyrra" (an eminent beauty influencer), and "nailart". Earned media being created about MAC, NARS, and OPI often includes more serious makeup tutorials or instructional content from professionals and beauty experts.
- A majority of the mass market brands were linked to more general beauty and retail terms, including "free", "lipstick", "love". L'Oréal and Covergirl earned the word "free", thanks to the large base of coupon bloggers running or sharing giveaways for these brands' products.

BRAND-RELATED PHRASES:

- A majority of the prestige brands were most frequently associated with a seasonal branded collection and corresponding digital campaign.
- A majority of the mass market brands were most frequently associated with an individual product.

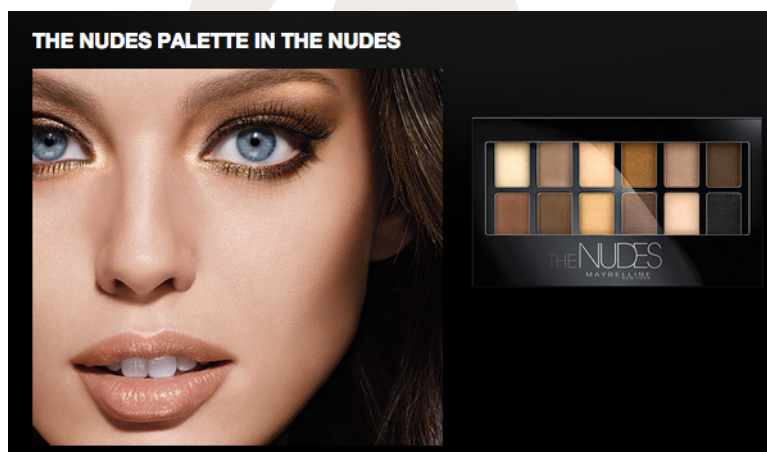
These earned media terms highlight noteworthy differences between prestige and mass market brands' approach to digital marketing and the earned media being created about them online.

Turning first to prestige brands, the constant running through these brand-related terms is the attention given to creating a temporally or socially relevant branded experience. Brands like MAC or NARS differentiate themselves from competitors by providing unique experiences with each new collection or campaign, that remain true to their brand's larger story. As a result, their customers are not driven by convenience; they shop at third party retailers, department stores, or the brand's own brick and mortar. These individuals choose a brand based on the emotional connection they feel to its story and whether they feel the brand's personality aligns with their own. As a result, we see prestige brands continuously invest in marketing and advertising campaigns that are unique, innovative, even controversial in an effort to appeal to these consumers beyond a product level. The marketing executive at a prestige brand's primary goal is to retell the brand's story in a unique, novel way through a series of brand experiences that will drive meaningful ongoing engagement. The strength of a prestige brand can be measured by the strength of its brand experiences.

Comparatively, although mass market brands are not short of attention-grabbing, flashy marketing campaigns, awareness for their brand is more directly tied to actual products. These brands rely on recognizable brand aesthetics and imagery, easy for the loyal convenience shopper to pick out from the noise of a crowded makeup aisle. Its not surprising that these brands were more commonly associated with their own products, and single words ranging from product category to others we would not be surprised to see splashed across a Walgreens' end-aisle display. The strength of a mass market brand is a reflection of overall brand awareness and product or collection recognition.

Taking a step back, this contrast may reflect a relatively new understanding amongst branding and marketing groups. As Scott Bedbury, former marketing executive for Starbucks and Nike believes, the "Old Brand World's top-of-mind" version of awareness is not enough to keep the modern day consumer interested and engaged. In today's highly competitive market, limitless options drive consumers to act on felt intangible connections. The brands that will come out on top are those that do not equate sheer "brand awareness" to "brand strength", but instead marry the two in brand experiences, engaging with consumers on a higher level based in emotional connections and self-actualization.

Applying these principles to our findings, mass market beauty brands should be cautious of resting on the laurels of their long-established brand awareness. Prestige brands seem to initially have a better grasp on this new kind of engagement, experience-driven, necessary to stay socially relevant and competitive moving forward.



THE TOP 10

ENGAGEMENT BY SOCIAL CHANNEL

The following data

reflects the social

influence of the top ten

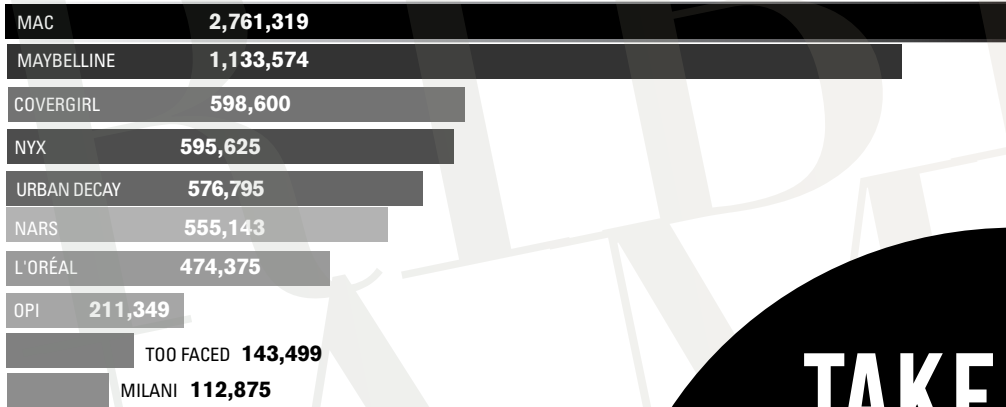
brands by engagement

across social channel for

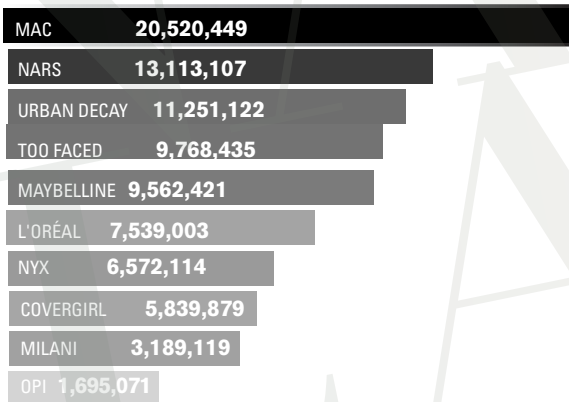
the month of July.

THE TOP 10 - ENGAGEMENT BY SOCIAL CHANNEL

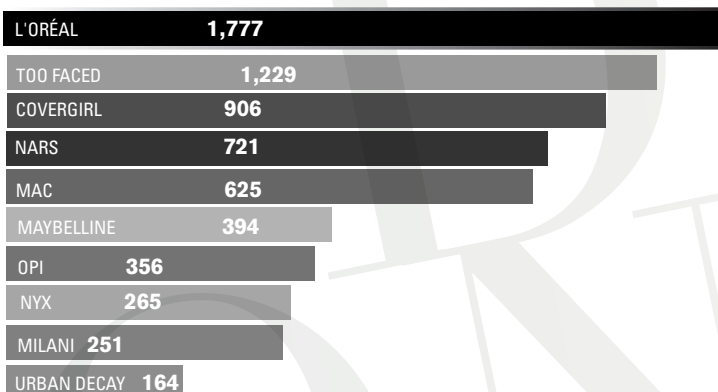
BLOG VIEWS



YOUTUBE VIEWS



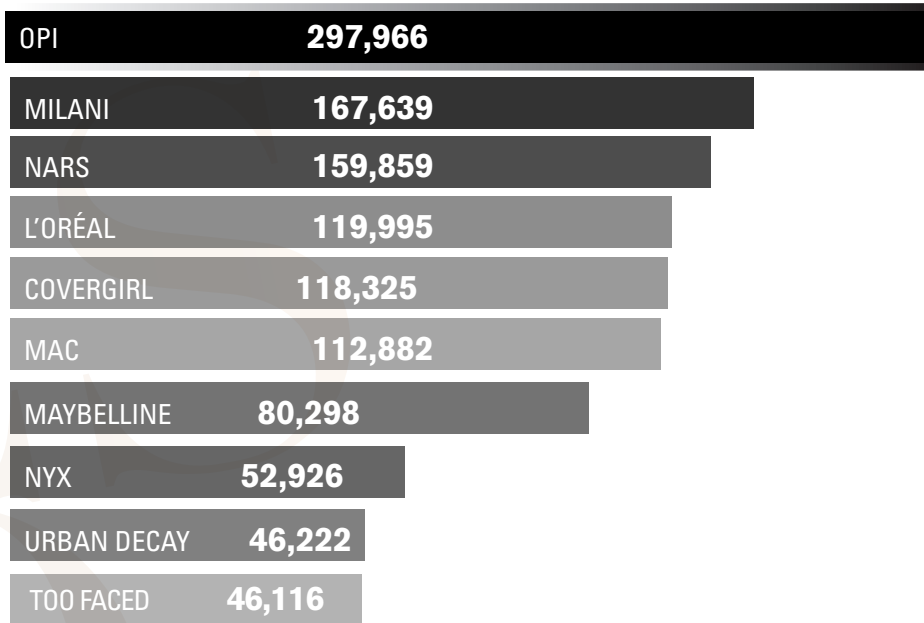
TWITTER ACTIONS



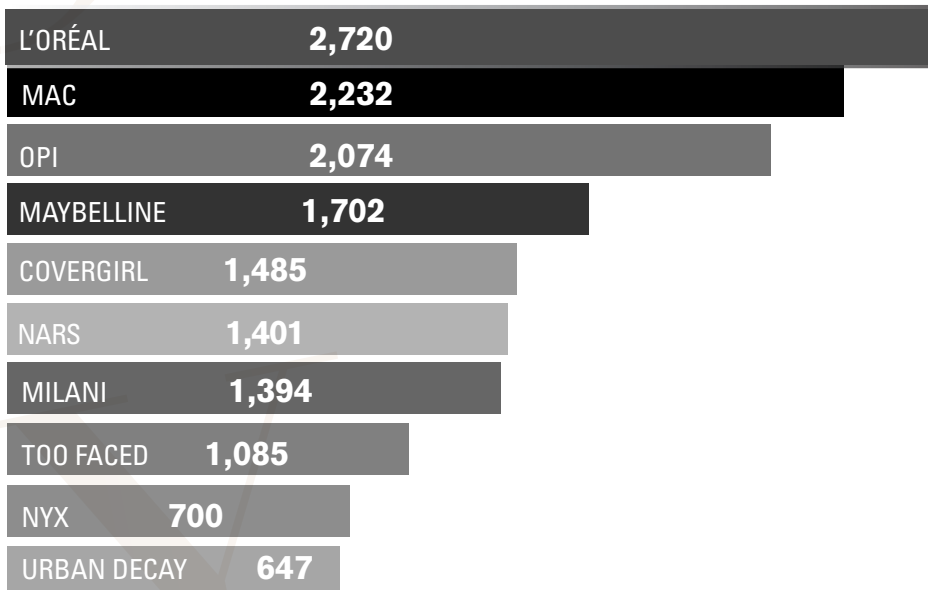
TAKE AWAYS

MAC continues to inspire the greatest number of posts in addition to the greatest engagement rates for blogs and YouTube. The brand's Marge Simpson makeup collection was a popular topic of conversation for the month within the beauty blogger community. MAC's co-branded campaigns gives its a brand a newness without having to make drastic changes to its brand image. With these well-aligned collections, MAC ensures that its brand continues to be an interesting and relevant topic of conversation.

FACEBOOK LIKES



FACEBOOK COMMENTS

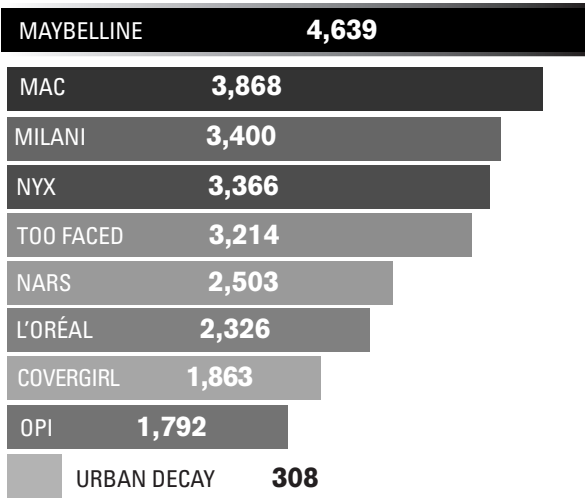


FACEBOOK SHARES

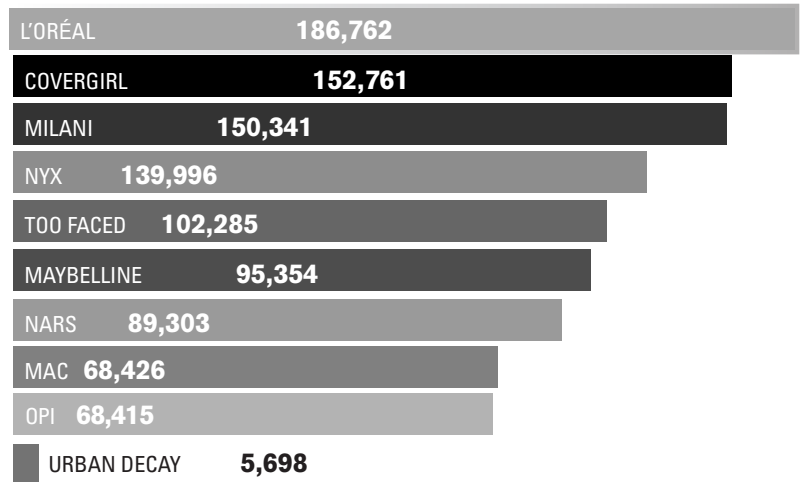


THE TOP 10 - ENGAGEMENT BY SOCIAL CHANNEL

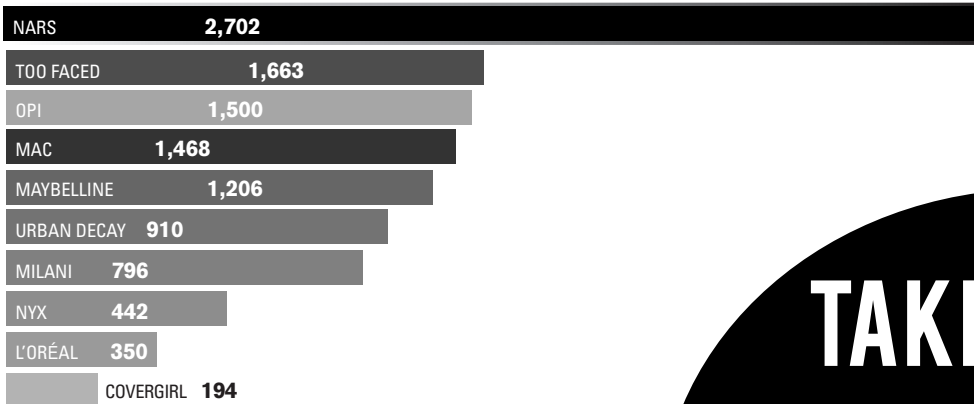
INSTAGRAM COMMENTS



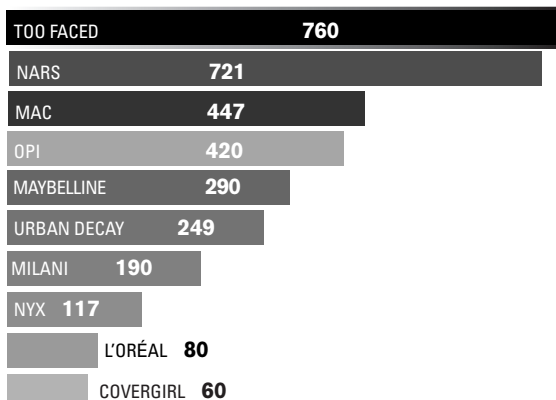
INSTAGRAM LIKES



PINTEREST SHARES



PINTEREST LIKES



TAKEAWAYS

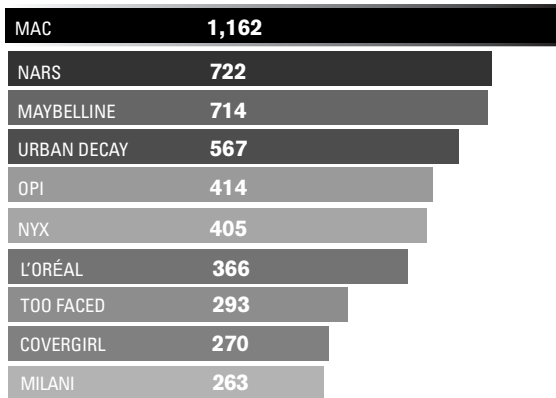
L'Oréal did well on Facebook for the month of July, generating the greatest number of shares and comments on the channel. The content varied in content, but demonstrated L'Oréal's dominant presence on the channel overall.

THE TOP 10

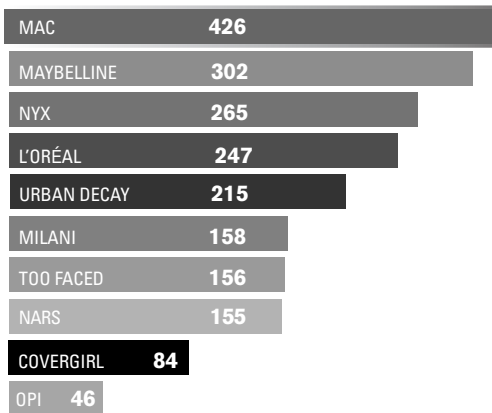
POST COUNT BY SOCIAL CHANNEL

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

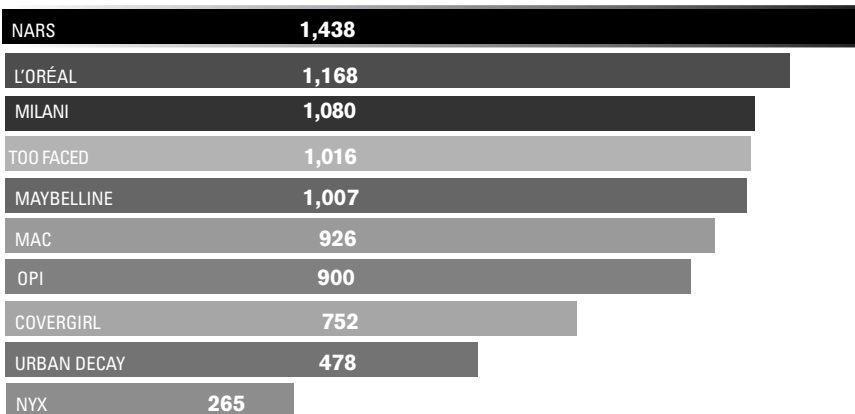
BLOG POSTS



YOUTUBE VIDEOS



TWEETS

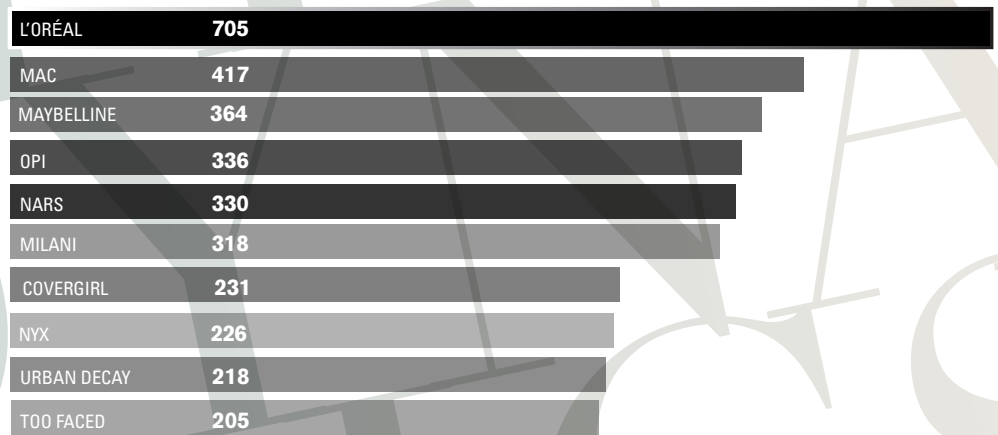


TAKEAWAYS

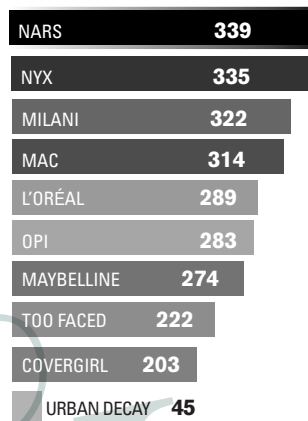
L'Oréal generated the greatest number of Facebook posts, however OPI still managed to earn the top slot in overall EMV produced for the channel. This speaks to the value of the content being created about the nail brand on Facebook. OPI owes its success to a handful of influencers posting photos of their nail polish creations that generated incredible engagement numbers. A couple of posts from Cosmetic Sanctuary neared 20,000 likes per post.

THE TOP 10 - POST COUNT BY SOCIAL CHANNEL

FACEBOOK POSTS



INSTAGRAM POSTS



PINTEREST POSTS

