

LA MODE MONTHLY

TRIBE DYNAMICS

DECEMBER 2014

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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.

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.

**Please note, the brands included in our La Mode Monthly Cosmetics reports are those offering primarily color cosmetics products within the larger beauty industry.*

In an effort to ensure that we are always providing the most insightful data and analysis to help you better understand the latest digital trends, we've made improvements to our measurement of earned media performance. This report includes these adjustments, with slight variations to the value of specific forms of content. As we continue to advance our own understanding of earned media we will update our analytics to reflect new knowledge and innovations.

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

THE TOP 10 EARNED MEDIA VALUE LEADER BOARD **10**

THE TOP 10 EARNED MEDIA VALUE BY CHANNEL **14**

ANALYSIS **20**

THE RIPPLE EFFECT: POSITIVELY INFLUENCING BRAND KNOWLEDGE FROM ITS ORIGIN **21**

YEAR IN REVIEW: 2014 IN EARNED MEDIA **24**

- PART 1: TRENDING OVERALL EARNED MEDIA PERFORMANCE, EMV **25**

- PART 2: EARNED MEDIA TERMS **26**

THE TOP 10

EARNED MEDIA VALUE LEADER BOARD

For the month of
December, the following
10 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 likes, comments, shares
Instagram likes and comments
Pinterest likes, comments, shares

- 1. MAC**
\$21,316,946.60 EMV
- 2. ANASTASIA BEVERLY HILLS**
\$16,448,566.75 EMV
- 3. TOO FACED**
\$14,278,297.25 EMV
- 4. NARS**
\$9,780,546.15 EMV
- 5. NYX COSMETICS**
\$8,877,917.00 EMV
- 6. L'ORÉAL**
\$7,892,591.70 EMV
- 7. URBAN DECAY**
\$7,678,333.30 EMV
- 8. TARTE COSMETICS**
\$6,402,134.25 EMV
- 9. MAYBELLINE**
\$6,344,020.55 EMV
- 10. BOBBI BROWN**
\$5,576,345.65 EMV

0 7,000,000 10,000,000 13,000,000 17,000,000 21,000,000

MAC

ANASTASIA BEVERLY HILLS

TOO FACED

NARS

NYX COSMETICS

L'ORÉAL

URBAN DECAY

TARTE COSMETICS

MAYBELLINE

BOBBI BROWN

MASS MARKET

PRESTIGE

MASS MARKET

\$23,114,529.25

PRESTIGE

\$81,481,169.95

252.51%

December's Top 10 provided a nice bookend to a transformative 2014 for the beauty industry. With new arrivals and trends, this month's leaderboard was illustrative of the democratization of influence occurring within digital. Although MAC lead in overall earned media performance for the month, the brand was outdone by competitors on three of the six social channels monitored where it had dominated in the past. Anastasia Beverly Hills made its first appearance, driving an incredible amount of engagement through Instagram. The brand is benefiting from relationships its nourished with top beauty influencers. Tarte Cosmetics proved that its appearance in November's Top 10 was not a fluke, commanding \$6,402,134.25 EMV overall placing the brand in eighth place just behind Urban Decay. Bobbi Brown held its ground extending its presence in our Top 10 for the second month running thanks to maintained success on YouTube and Instagram.



THE TOP 10

**EARNED MEDIA VALUE
PERFORMANCE BY CHANNEL**

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

BLOG EMV

MAC

\$1,230,467.60

NARS

\$771,508.40

URBAN DECAY

\$658,069.80

MAYBELLINE

\$609,382.80

NYX COSMETICS

\$320,054.00

BOBBI BROWN

\$312,364.40

L'ORÉAL

\$302,029.20

TOO FACED

\$282,570.00

ANASTASIA BEVERLY HILLS

\$76,005.00

TARTE COSMETICS

\$23,640.00

YOUTUBE EMV

MAC

\$9,540,674.00

NARS

\$5,122,137.75

TOO FACED

\$4,653,877.25

L'ORÉAL

\$4,398,762.50

MAYBELLINE

\$4,391,077.75

NYX COSMETICS

\$3,729,488.00

URBAN DECAY

\$3,580,658.50

BOBBI BROWN

\$3,167,451.25

ANASTASIA BEVERLY HILLS

\$2,042,481.75

TARTE COSMETICS

\$64,769.25

TWITTER EMV

URBAN DECAY

\$179,600.00

MAC

\$179,200.00

TOO FACED

\$168,500.00

NARS

\$132,300.00

L'ORÉAL

\$111,900.00

MAYBELLINE

\$80,700.00

BOBBI BROWN

\$67,000.00

ANASTASIA BEVERLY HILLS

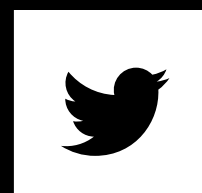
\$54,900.00

TARTE COSMETICS

\$54,200.00

NYX COSMETICS

\$44,100.00



FACEBOOK EMV

TOO FACED

\$1,866,140.00

MAC

\$1,739,035.00

LORÉAL

\$1,507,085.00

URBAN DECAY

\$1,247,475.00

ANASTASIA BEVERLY HILLS

\$1,198,235.00

TARTE COSMETICS

\$756,940.00

NYX COSMETICS

\$639,490.00

NARS

\$633,065.00

MAYBELLINE

\$240,240.00

BOBBI BROWN

\$205,250.00

INSTAGRAM EMV

ANASTASIA BEVERLY HILLS

\$13,058,515.00

MAC

\$8,261,520.00

TOO FACED

\$7,031,040.00

TARTE COSMETICS

\$5,484,555.00

NYX COSMETICS

\$3,947,745.00

NARS

\$2,898,510.00

URBAN DECAY

\$1,768,095.00

URBAN DECAY

\$1,612,510.00

L'ORÉAL

\$1,492,200.00

MAYBELLINE

\$936,430.00

PINTEREST EMV

MAC

\$370,190.00

TOO FACED

\$276,170.00

URBAN DECAY

\$245,250.00

NARS

\$224,020.00

BOBBI BROWN

\$211,770.00

NYX COSMETICS

\$197,040.00

MAYBELLINE

\$86,190.00

LORÉAL

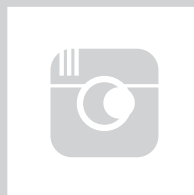
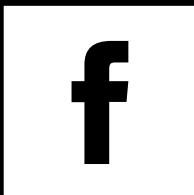
\$81,510.00

ANASTASIA BEVERLY HILLS

\$18,430.00

TARTE COSMETICS

\$18,030.00



November's trends continued into December with overall improvements in earned media performance on Instagram. Originally dominated by MAC and NYX Cosmetics, the channel is progressively becoming a more even playing field, with brands like Anastasia Beverly Hills, Too Faced, and Tarte Cosmetics building active communities of advocates on Instagram.

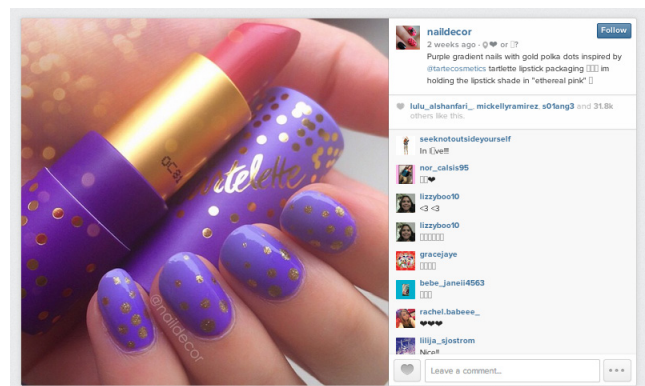
Incredibly, Anastasia's Instagram success not the result of a specific campaign or product launch. The brand owes its impressive EMV to the large community of beauty bloggers and makeup artists including the brand's products in posts of inspired makeup looks. It's clear that the community still associates the brand with its namesake brow products, featured in the majority of these pages.

By contrast, Too Faced excelled on Instagram and Facebook thanks to social buzz surrounding the release of a second Chocolate Palette. The brand benefited from content created by both third party retailers, primarily Sephora, as well as those created by beauty influencers and everyday consumers. The anticipation of the second palette was reminiscent of the social response to Urban Decay's release of a second and third Naked Palette. Over the course of the month, Sephora shared content spotlighting the new palette making it particularly desirable to its incredibly-trusting community of consumers. The retailer helped market this new "Semi-Sweet" palette as a warmer companion to the first Chocolate Palette, offering a variety of new shades and possible looks for fans of the original. Beauty influencers online responded accordingly, posting to Instagram their own creations that highlighted the palette's range of matte, natural nudes and browns.



MAC maintained its dominant performance on YouTube, as one of the most frequently mentioned brands this month within holiday and New Years Eve video tutorials. Its success amongst these videos demonstrates the clarity and strength of MAC's brand associations and identity. Beauty influencers and their community of followers automatically connect MAC with over-the-top, dramatic makeup, well-suited for flashy holiday and NYE parties. With this consumer understanding of its brand in place, MAC captures a segment of beauty customers around the holidays who might not normally purchase its products for everyday wear. The brand is by all means still recognized as the industry's standard for extravagant-party makeup and universally appealing to women looking for these kinds of products during the season.

Earned media on Pinterest also improved with MAC, Too Faced, and Urban Decay leading the way. MAC's lipsticks were a favorite within Pinterest posts, while Too Faced benefited from content about its Chocolate Palettes and Urban Decay, its Naked Palettes.



THE RIPPLE EFFECT:

POSITIVELY INFLUENCING BRAND KNOWLEDGE FROM ITS ORIGIN

Taking a closer look at the content created about Too Faced and Tarte Cosmetics this month, a pattern becomes clear in respect to how awareness for these brands and their products spread within the beauty community online. Recall the pyramid of influence we included in November's report. At the top are the most valuable influencers, posting high-engagement photographs or creating videos that are then shared with a larger community of interested consumers, who in turn pass along knowledge to their extended groups of friends.

Another way to think about the way brand knowledge is shared and entrenched into consumer understandings is to compare its spread to the ripple effect a rock has when it hits water. Imagine that each valuable influencer creating content triggers a chain reaction, as brand awareness reaches their followers and spreads outwards to larger communities of consumers. An idea or impression originates with an influential individual from which subsequent understandings and perceptions of your brand are formed and maintained.

The analogy might seem a bit obvious, but it speaks to the importance of establishing intimate lines of communication with the influencer where content and a subsequent consumer perception of your brand originates. This is of course the primary goal of ambassador programs: to start an open dialogue with influencers and positively influence what is organically shared, without marginalizing the authenticity of the content.

As you or your team might have already experienced, beauty brands walk a fine line between "positively influencing" and "controlling" what is being said. There is certainly an incentive to guarantee exactly what an influencer shares what internally you consider your brand's points-of-difference, important product facts, uses etc. However, demands of this kind with formalized legal contracts can significantly marginalize the authenticity and the enthusiasm of the content created, i.e. what makes it meaningful to the viewer and motivates them to pick up your brand's product on their next visit to Sephora. However, there are ways to more impartially and indirectly "positively influence" what influencers you engage with create about your brand.

When systemizing your brand's ambassador program, keep in mind that each time you send products to an influencer the accompanying brand experience should aim to supply knowledge about your brand in two respects: education and "brand love", a term we picked up from a recent meeting with the team at Murad. The education piece comes into play through the materials you choose to send: everything from the inserts you include down to the packaging itself should inform the influencer about what makes your brand unique.

The education piece can be further broken down by visuals and information. It's possible to communicate a great deal about your brand's personality, imagery, mantras, and important attributes through the visual appeal of the products, the packaging itself, and all other materials. By contrast, an insert of some kind is necessary when it comes to educating influencers about more tangible points-of-difference, specific benefits and uses of products, through testimonials from other influencers, links to video tutorials online, or product ingredients.

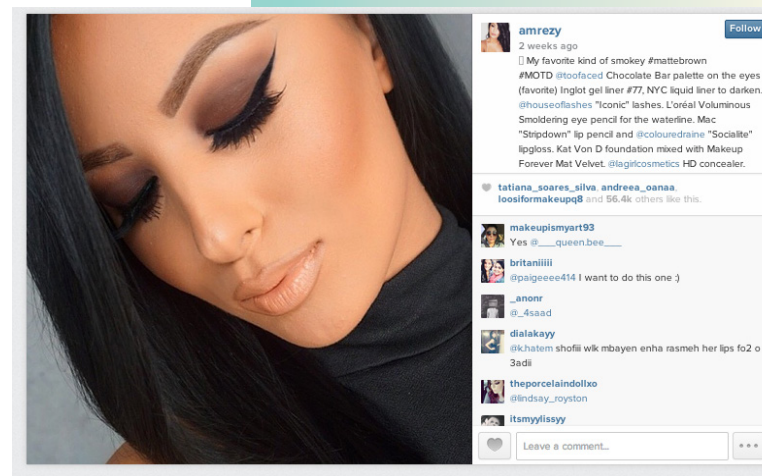
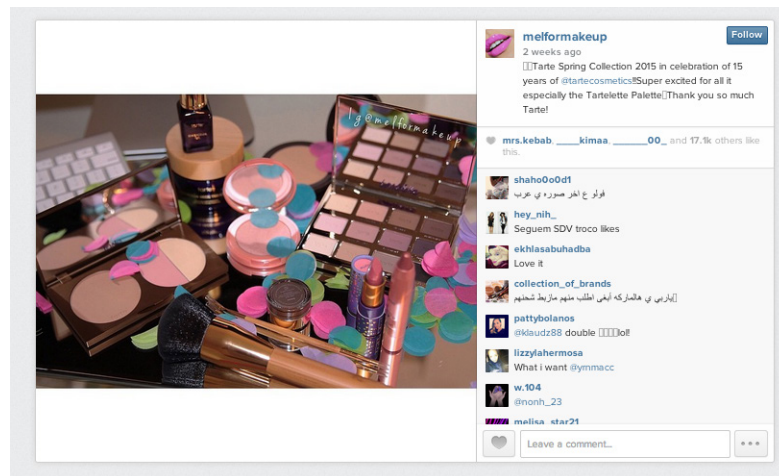
As "brand love" is concerned, this is accomplished through the unexpected surprise component of an ambassador program versus a formal contractual relationship with a blogger. While the cost per SKU to you is insignificant, the recipient is going to value the collection of eyeshadows, lipsticks, etc. at retail value. Think of it this way, an influencer unexpectedly receiving Tarte's entire new Spring Collection without any asks or terms, is going to create much more valuable content than someone who in advance agrees to create content about a Brand X's new products each season. The generosity of the former, informs the feelings influencers will come to associate with the brand, establishing a more meaningful emotional connection that will be evident in the resulting content creation.

As a brand, your goal should be to mesh education and "brand love" in a way that is particularly meaningful to your target influencers so that they can accurately and positively raise awareness to their followers. Synchronized with internal marketing efforts, this content can be leveraged to share desirable knowledge about your brand with a larger base of beauty consumers that will make an impact at point-of-purchase.

In the case of Too Faced and Tarte this month, each had a unique handful of top influencers creating valuable content about the brand on Instagram. These posts included a number of tools allowing for further engagement beyond the image itself: links to video tutorials, pairing recommendations via blog posts, sweepstakes or giveaway opportunities, etc. The response was a much larger collection of posts including recreations of the original look from the influencer, closeups of products purchased at Sephora based on the influencer's recommendation, or possibly new pairing ideas and sources of inspiration.

Who decides whether sales figures for Too Faced's Semi-Sweet Chocolate Palette will reach Urban Decay's success with its Naked 2 Palette? It's not the average beauty consumer in Sephora comparing the two products side-by-side, evaluating the texture of the eyeshadow, matching the shades to their skin tones, etc. Why did the consumer pick up these two particular palettes to be- ing with? They were already aware of the product thanks to the beauty influencer whose blog they read recently or Instagram photo they viewed on their morning commute.

The point is that when it comes to informing consumer understandings about your brand and making their purchase decision easier, it's important to start at the source. These influencers' advice have become arguably more powerful than the Glamour and Instyles of the world. The more educated and passionate these influential individuals are as advocates of your brand, the better.

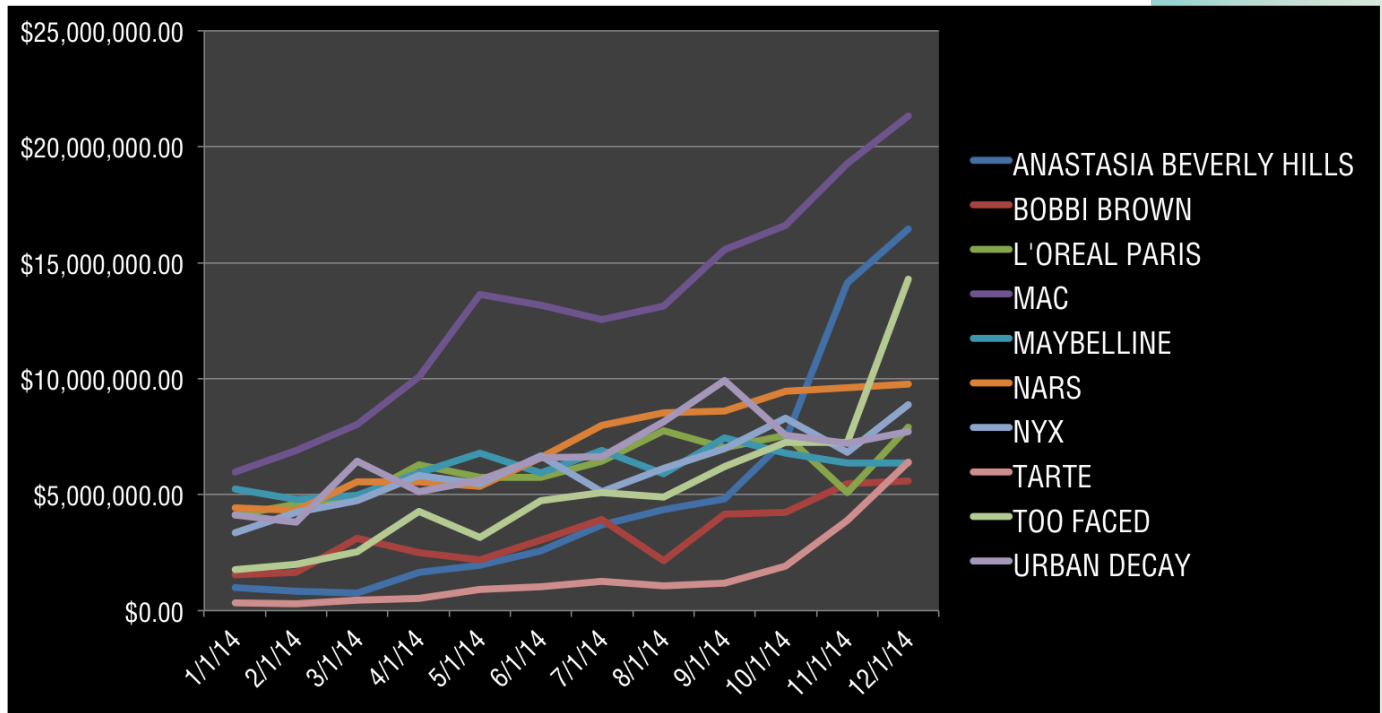


YEAR IN REVIEW:

2014 IN EARNED MEDIA

PART 1: TRENDING OVERALL EARNED MEDIA PERFORMANCE, EMV

The following data highlights the trending annual EMV performance of this month's Top 10 brands for 2014.



MONTH	ANASTASIA BEVERLY HILLS	BOBBI BROWN	L'OREAL PARIS	MAC	MAYBELLINE	NARS	NYX	TARTE	TOO FACED	URBAN DECAY
1/1/2014	\$1,010,188.50	\$1,541,678.30	\$4,125,253.50	\$5,968,379.70	\$5,248,384.45	\$4,418,048.25	\$3,359,333.25	\$318,759.50	\$1,767,318.00	\$4,123,504.55
2/1/2014	\$835,139.00	\$1,637,492.45	\$4,568,616.30	\$6,890,973.15	\$4,793,046.40	\$4,319,393.05	\$4,252,261.55	\$278,805.25	\$1,989,268.90	\$3,805,739.10
3/1/2014	\$751,261.75	\$3,128,646.90	\$4,863,038.75	\$8,012,019.00	\$4,976,029.55	\$5,557,220.15	\$4,723,748.30	\$466,727.00	\$2,522,057.30	\$6,434,481.00
4/1/2014	\$1,644,137.25	\$2,489,046.50	\$6,276,318.45	\$10,078,468.05	\$5,948,126.40	\$5,537,478.90	\$5,814,352.35	\$522,112.05	\$4,293,742.50	\$5,141,475.30
5/1/2014	\$1,971,763.75	\$2,195,221.55	\$5,734,356.30	\$13,649,299.70	\$6,772,898.50	\$5,342,331.40	\$5,480,479.60	\$915,050.25	\$3,175,044.10	\$5,611,663.75
6/1/2014	\$2,559,763.05	\$3,042,838.40	\$5,738,198.35	\$13,156,244.15	\$5,955,297.35	\$6,584,791.80	\$6,679,304.30	\$1,018,253.30	\$4,728,869.05	\$6,585,498.45
7/1/2014	\$3,686,228.25	\$3,918,079.20	\$6,430,729.50	\$12,565,616.30	\$6,903,575.05	\$7,983,832.35	\$5,117,076.00	\$1,269,575.00	\$5,100,385.05	\$6,639,656.00
8/1/2014	\$4,340,501.55	\$2,166,194.40	\$7,739,364.00	\$13,133,331.05	\$5,886,353.70	\$8,518,546.20	\$6,138,867.85	\$1,057,939.75	\$4,887,538.05	\$8,144,574.10
9/1/2014	\$4,805,308.25	\$4,167,015.80	\$7,011,212.55	\$15,550,983.05	\$7,440,728.30	\$8,591,549.45	\$6,973,939.75	\$1,183,251.50	\$6,207,674.05	\$9,909,296.50
10/1/2014	\$7,360,371.50	\$4,239,597.75	\$7,548,018.25	\$16,615,339.95	\$6,805,615.35	\$9,466,785.00	\$8,285,777.75	\$1,900,526.50	\$7,271,750.30	\$7,553,774.40
11/1/2014	\$14,119,358.25	\$5,456,449.25	\$5,086,540.00	\$19,280,338.15	\$6,345,626.40	\$9,624,477.05	\$6,838,518.75	\$3,879,861.75	\$7,251,475.60	\$7,202,508.40
12/1/2014	\$16,448,566.75	\$5,576,345.65	\$7,892,591.70	\$21,336,946.60	\$6,353,205.55	\$9,780,546.15	\$8,887,917.00	\$6,402,134.25	\$14,278,297.25	\$7,698,333.30

PART 2:

EARNED MEDIA TERMS

1.1. EMV ATTRIBUTED TO THE EARNED MEDIA TERM "HOLIDAY"

The following represents the earned media performance of each brand in online beauty conversations mentioning "holiday".

1. MAC: \$2,974,388.50

2. Anastasia Beverly Hills: \$1,140,853.25

3. Too Faced: \$2,068,902.50

4. NARS: \$1,558,186.75

5. NYX Cosmetics: \$1,736,060.50

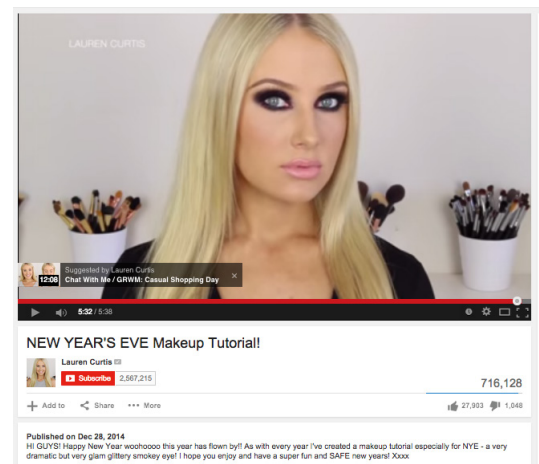
6. L'Oréal: \$1,651,757.00

7. Urban Decay: \$851,232.25

8. Tarte Cosmetics: \$747,442.25

9. Maybelline: \$1,106,619.75

10. Bobbi Brown: \$800,627.75



1.2 EMV ATTRIBUTED TO THE EARNED MEDIA TERM “NYE”

The following represents the earned media performance of each brand in online beauty conversations mentioning “NYE”.

1. MAC: \$723,923.50

2. Anastasia Beverly Hills: \$735,973.00

3. Too Faced: \$503,642.75

4. NARS: \$206,452.75

5. NYX Cosmetics: \$330,507.50

6. L’Oréal: \$326,981.50

7. Urban Decay: \$383,466.00

8. Tarte Cosmetics: \$70,025.00

9. Maybelline: \$237,091.75

10. Bobbi Brown: \$20,380.00



