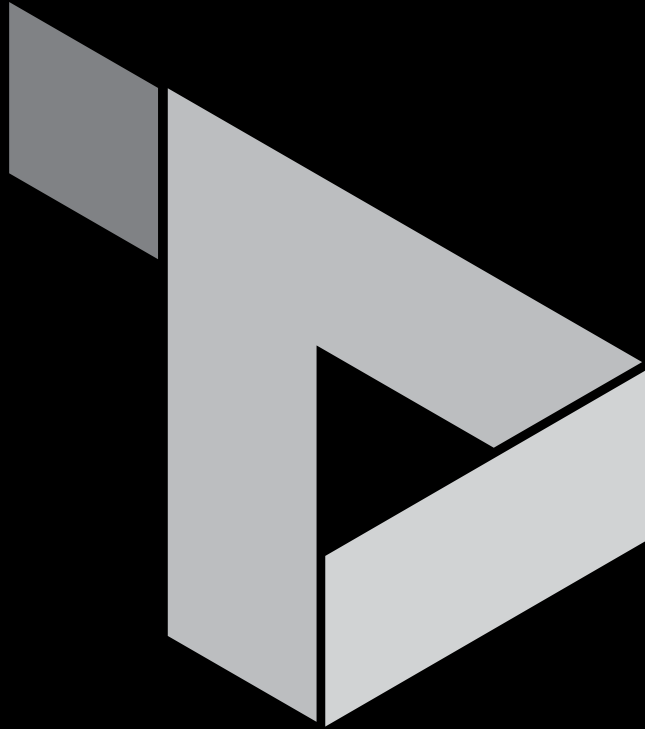


# LA MODE MONTHLY

TRIBE DYNAMICS

FEBRUARY 2015



TRIBE DYNAMICS

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DESIGN: JORDYN ALVIDREZ

*FEBRUARY*

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/INSIGHTS](https://tribedynamics.com/insights)

\*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 and learn about the industry, we will update our analytics to reflect new knowledge and innovations.

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# THE TOP 10

**OVERALL EARNED MEDIA PERFORMANCE**

For the month of  
February, the following  
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:

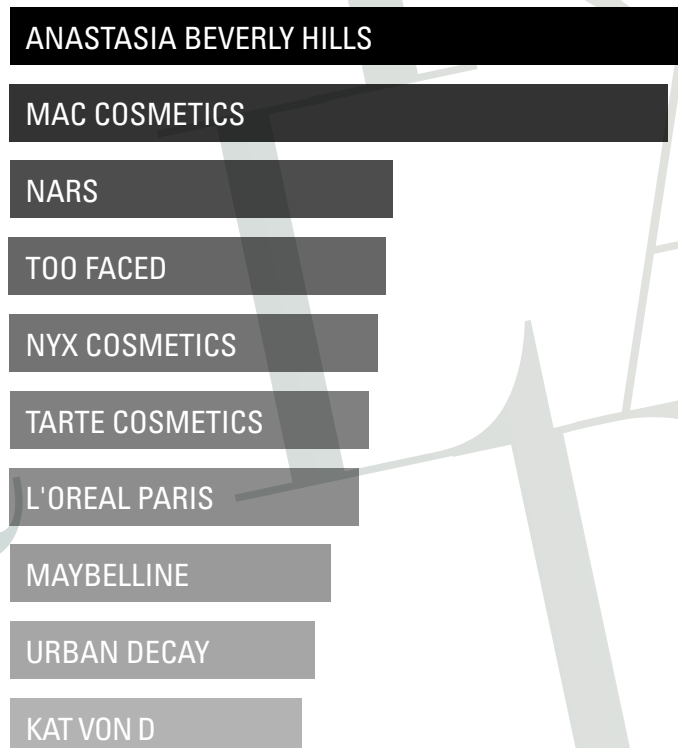
Blog posts  
YouTube Videos  
Tweets  
Facebook posts  
Instagram posts  
Pinterest Posts

### ENGAGEMENT RATE BY:

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

1. ANASTASIA BEVERLY HILLS \$24,637,439 EMV
2. MAC COSMETICS \$24,170,849 EMV
3. NARS \$11,832,305 EMV
4. TOO FACED \$11,056,965 EMV
5. NYX COSMETICS \$10,813,606 EMV
6. TARTE COSMETICS \$10,376,487 EMV
7. L'OREAL PARIS \$9,312,486 EMV
8. MAYBELLINE \$8,682,641 EMV
9. URBAN DECAY \$6,865,016 EMV
10. KAT VON D \$6,503,384 EMV

0 5,000,000 15,000,000 25,000,000



MASS MARKET  
\$28,808,734

PRESTIGE  
\$95,442,445  
231.30%

February's La Mode Top 10 tells a story about the burgeoning celebrity status of beauty influencers. With far more brands investing in influencer programs in place of traditional advertising, it becomes all the more clear just how powerful these individuals have become in leveraging brand awareness.

The value for brands of content being created by these influencers is twofold: reach and brand associations. It goes without saying that as a brand, being tagged in a post with the potential to reach millions of followers and draw fifty thousand likes is lucrative. However, these influencers have also been instrumental in establishing meaningful connections between competing brands, creating natural associations in the minds of consumers based on the joint use of these brands' products to create a look.

To give all the credit to these influencers would be a mistake. The rising stars in our Top 10 have adopted a unique strategy that's helped them quickly climb the social influence ladder to the top of our leaderboard. This month, we'll take a closer look at how the celebrity influencer phenomena has directly impacted the social influence of brands within our La Mode Top 10.

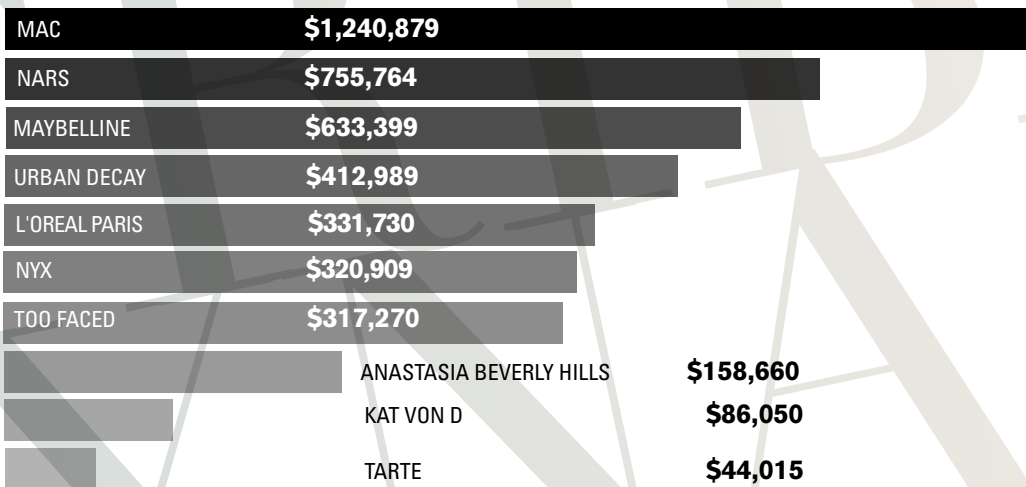
# THE TOP 10

**EARNED MEDIA VALUE  
PERFORMANCE BY CHANNEL**

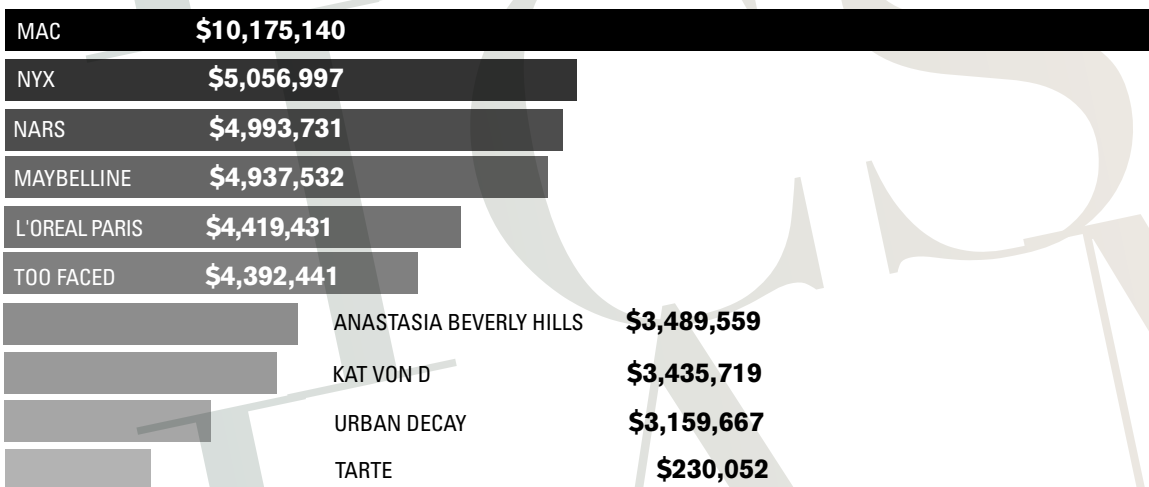
The following data  
reflects the approximate  
value of the content  
created about each brand  
by social channel during  
the month of February,  
as measured by Earned  
Media Value.

## THE TOP 10 - EMV BY SOCIAL CHANNEL

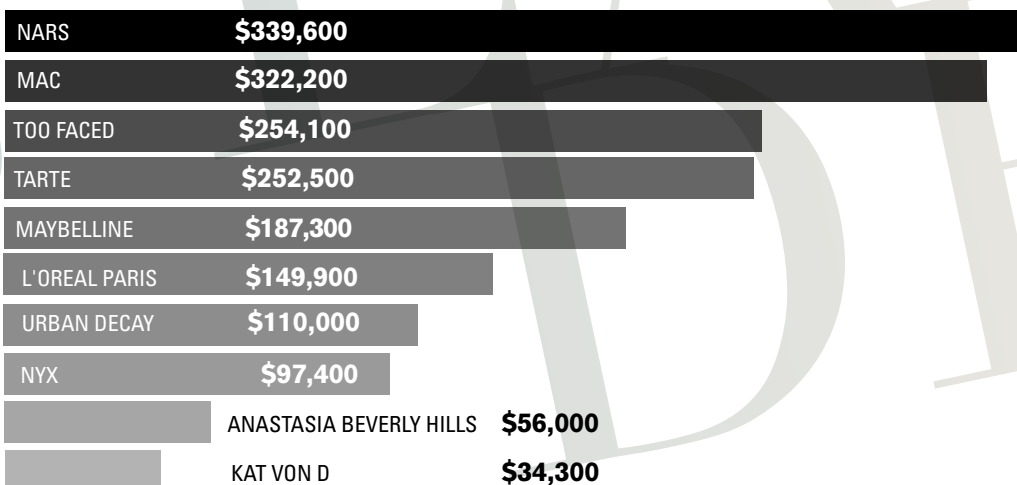
### BLOG



### YOUTUBE



### TWITTER

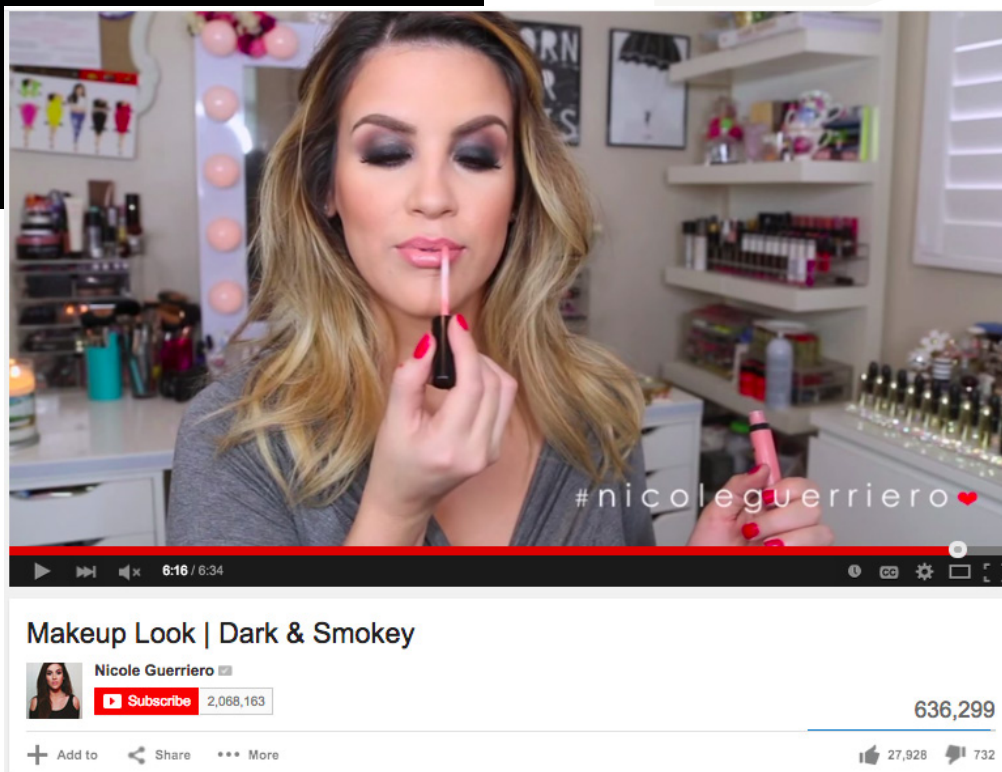


## MAC THROUGH THE EYES OF YOUTUBERS

MAC dominated YouTube for the month as a favorite amongst vloggers creating Valentine's Day makeup tutorials. These tutorials varied in tone and intended audience, ranging from softer, teen-appropriate makeup to sexier sophisticated smoky eyes and painted red lips. Despite differences in style, these influencers share a preference for MAC products.

Beyond its diverse appeal, MAC's inclusion in these videos highlights its reputation amongst beauty consumers. Within a single tutorial, the influencer would endorse multiple MAC products from foundations and bronzers to professional tools. This pattern is unique to MAC, whereas most brands are mentioned alongside an individual product. In their step by step processes, influencers will sometimes use twenty or more products to create complex makeup looks. It's therefore significant that of these brands, MAC exclusively has more than one of its products featured per post.

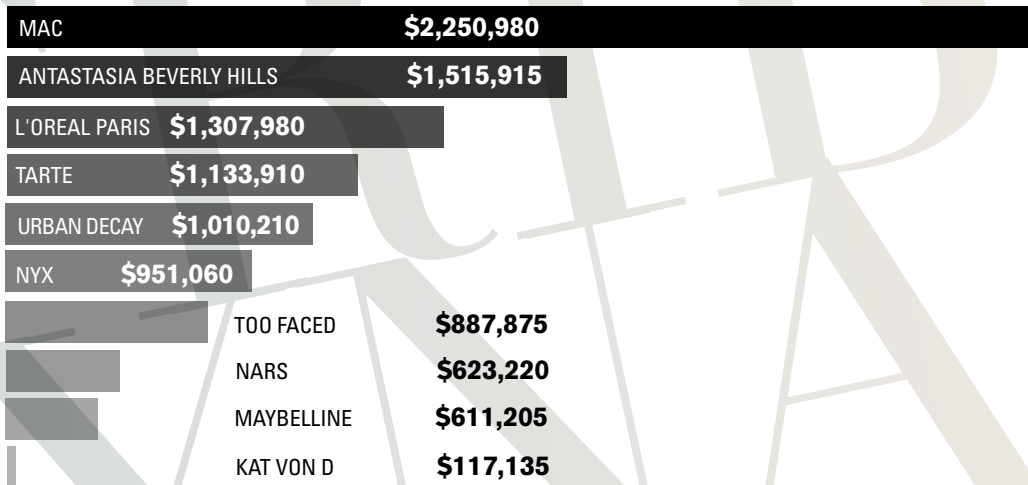
To this end, the \$10M in EMV MAC generated on the channel speaks to the widespread respect it has built amongst consumers. Its reputation as a leader in professional makeup creates an aspirational appeal for influencers and every-day consumers. MAC is associated with reliable products of a professional quality - trustworthy staples within a beauty regimen. Consumers choose MAC assuming its products will deliver. The comfort level these very different communities share explains how MAC's been able to maintain its innovative edge amongst professionals while also being an accessible favorite with young influencers.



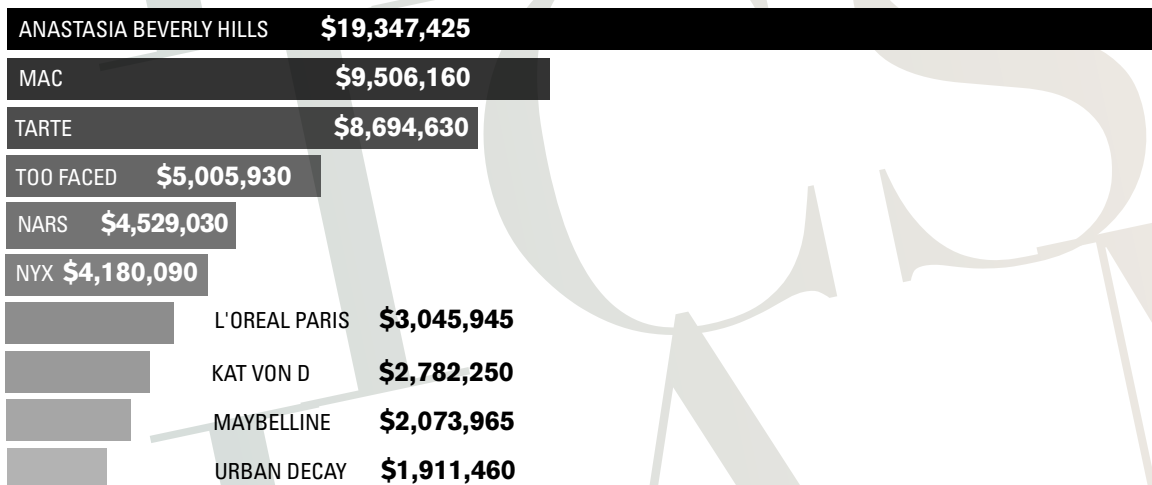


## THE TOP 10 - EMV BY SOCIAL CHANNEL

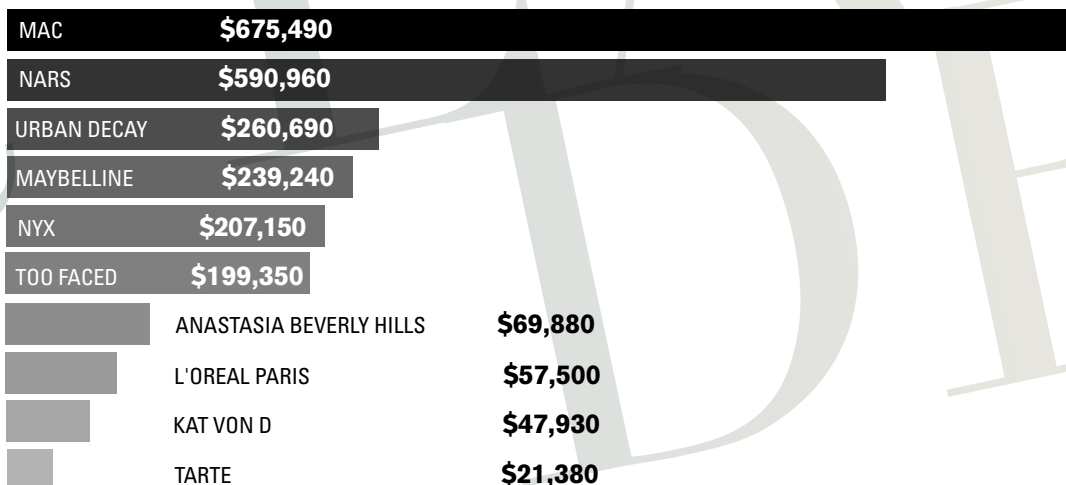
### FACEBOOK



### INSTAGRAM



### PINTEREST



## TARTE'S CLIMB ON INSTAGRAM

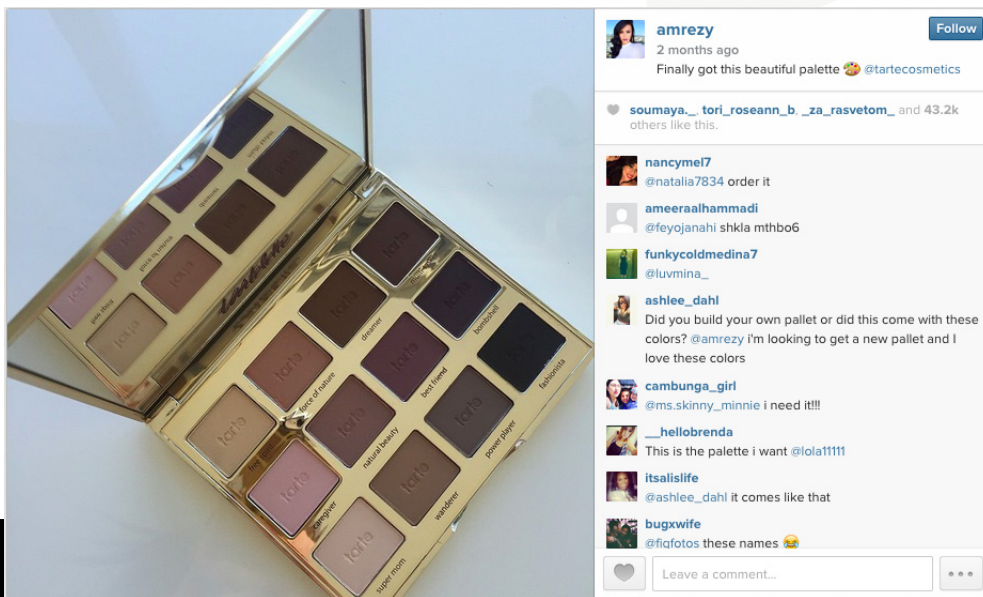
In less than a month, Tarte managed to not only reclaim its spot on our La Mode Top 10 leaderboard. The brand ranked sixth in overall earned media performance, besting direct competitors like Urban Decay and established leaders including L'Oréal Paris and Maybelline. On Instagram, Tarte took third behind Anastasia (\$19M EMV) and MAC (\$9.5M EMV) with approximately \$8.7M in EMV; Too Faced placed fourth with \$5M.

To better put Tarte's rate of growth in perspective, the brand closed out 2014 with around \$6.4M in overall EMV for December, more than \$2M less than it produced on Instagram alone in February.

Even more impressive, the jump cannot be attributed solely to a product launch or viral campaign. Instead, Tarte's ascension resembles that of Anastasia Beverly Hills and NYX before it: an explosion of awareness sparked by a community of top influencers creating high-engagement Instagram content.

Despite its more playful, girly brand personality, Tarte was a favorite amongst influencers creating more sultry contoured looks who also favored MAC Cosmetics, Anastasia, and NARS. The new tartlette Amazonian clay matte palette was frequently used to create a smoldering smoky eye that paired well with careful highlighting and shadowing.

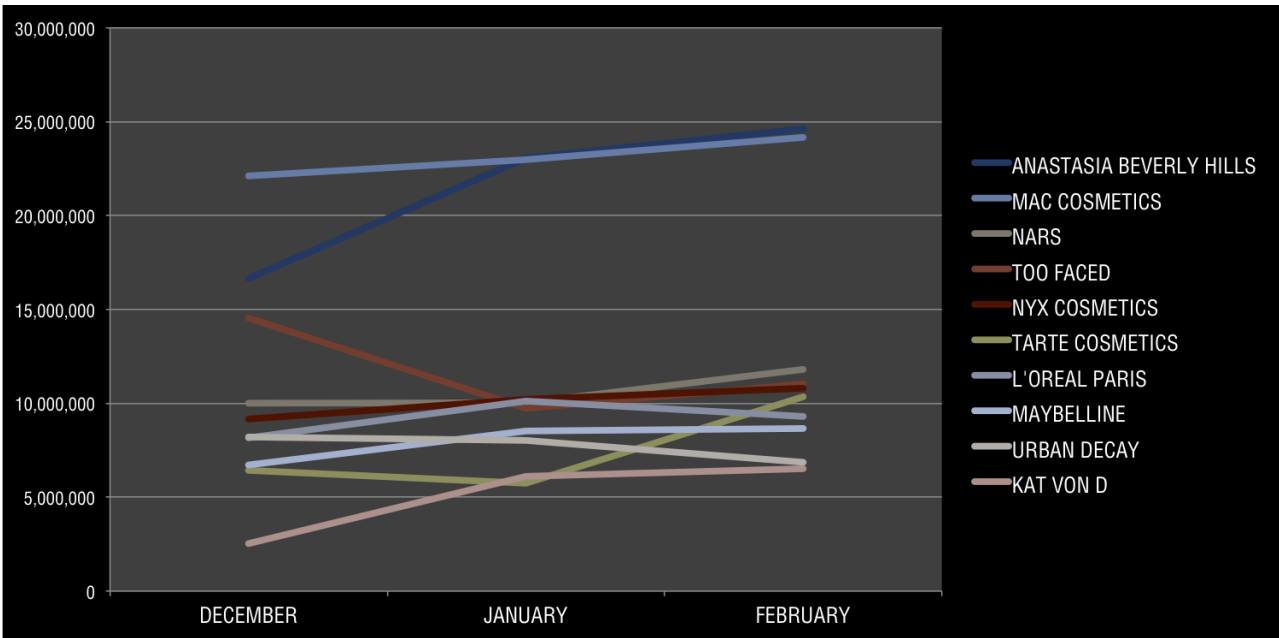
Tarte shared a large portion of its Instagram content with the brands listed above, in addition to others, as influencers can sometimes tag up to six or seven brands in a single post. Influencers who favored Anastasia's brow products also preferred Tarte's eye-shadow palettes and liners. The frequency with which these brands and their products are paired to create a finished look sends a clear message: they are meant to be used together.



# TRENDING EARNED MEDIA PERFORMANCE: **EARNED MEDIA VALUE**

The following data  
highlights the trending  
EMV performance of  
February's Top 10 brands  
over the past three  
months.

# TRENDING EMV PERFORMANCE



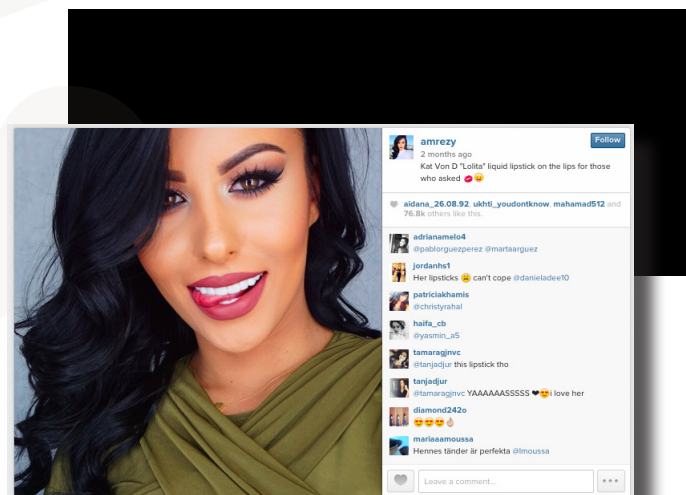
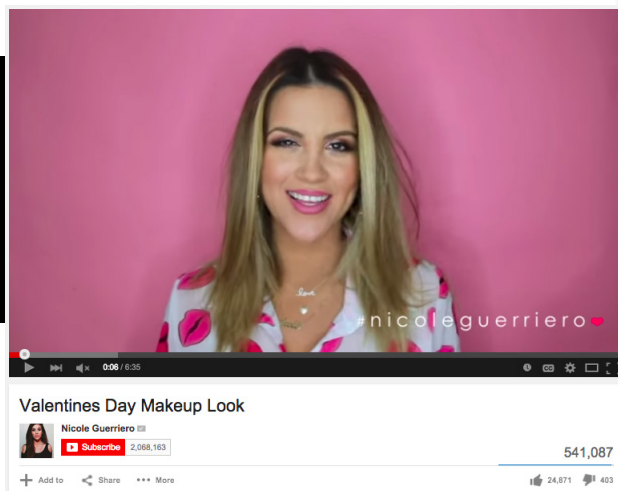
BRAND	DECEMBER	JANUARY	FEBRUARY	DEC-FEB	JAN-FEB
ANASTASIA BEVERLY HILLS	16,655,892	23,085,296	24,637,439	47.92%	6.72%
MAC COSMETICS	22,094,487	22,987,175	24,170,849	9.40%	5.15%
NARS	10,011,654	10,038,801	11,832,305	18.19%	17.87%
TOO FACED	14,550,601	9,736,450	11,056,965	-24.01%	13.56%
NYX COSMETICS	9,152,885	10,199,690	10,813,606	18.14%	6.02%
TARTE COSMETICS	6,414,190	5,730,114	10,376,487	61.77%	81.09%
L'OREAL PARIS	8,143,506	10,138,194	9,312,486	14.35%	-8.14%
MAYBELLINE	6,721,487	8,541,269	8,682,641	29.18%	1.66%
URBAN DECAY	8,210,848	8,038,911	6,865,016	-16.39%	-14.60%
KAT VON D	2,534,861	6,094,821	6,503,384	156.56%	6.70%

Spanning December to February, Anastasia, Tarte Cosmetics and Kat Von D shared trajectories of incredible earned media growth. These brands highlight three sequential stages of brand awareness fueled by celebrity influencers.

Anastasia, already enjoying the impact of influencer content, continued its upward climb in February. Although its performance has steadied to a more gradual incline, the brand's 7% increase in EMV between January and February extended its lead over longtime leader MAC Cosmetics. The brand's social influence success rests on the shoulders of a handful of influencers whose follower counts and engagement rates more than double Hollywood stars, television icons, amongst other celebrities. In February alone, Anastasia was mentioned in sixteen Instagram posts with over 50K likes each; the photo receiving the most likes surpassed 90K likes. To call these posts viral would be an understatement.

After dropping off our leaderboard in January, Tarte Cosmetics' 81% increase in EMV in February won it 6th place. Awareness for the brand amongst this same group of celebrity influencers took a significant turn; Tarte's EMV on Instagram surged from \$4.8M in EMV for January to \$8.7M in just a month. The brand began showing up frequently in these glamour shots posted by influencers like @nicoleguerriero and @amrezy, alongside Anastasia and MAC. Tarte's partnership with @grav3yardgirl also helped boost the brand's presence on the channel and credibility amongst influencers who took notice of the relationship.

Kat Von D.'s significant jump in performance could signal that the brand is on the cusp of a NYX Cosmetics or Anastasia -esque breakout. The brand's growing esteem amongst top influencers mimics patterns in content creation we first saw with NYX, Too Faced, Anastasia, and most recently Tarte. While a niche community of consumers is more likely to identify with the brand's unique personality and the founder's story, the appeal of its recently launched Shade+Light Contour Collection is universal. Through its own messaging, the brand has discovered ways to leverage Kat Von D.'s reputation as a tattoo artist to associate its brand with advanced artistry and experience manipulating light and shadows. The connection between this knowledge and contouring with cosmetics is an obvious one for influencers and consumers interested in learning how to reproduce the trend for themselves. As we witnessed with Anastasia's success within Kim Kardashian contouring tutorials, associations like this can be powerful when it comes to driving significant brand awareness.



## EARNED MEDIA TERMS

The following data highlights February's earned media performance of each brand in relation to the following terms and trends.

## BRAND-TO-BRAND ASSOCIATIONS

To further prove that influencers are responsible for these powerful associations between brands and trends, we identified the top three brands generating the most EMV within online conversations also mentioning this month's superstar, Anastasia Beverly Hills.

MAC + "Anastasia": \$4,738,988

Tarte Cosmetics + "Anastasia": \$3,333,560

Too Faced + "Anastasia": \$1,934,853.00

It's not a coincidence that Tarte ranked second. With MAC as the exception, top influencers are publishing content showing themselves using Tarte's products alongside Anastasia's more frequently than any other brand in our La Mode Top 10. With a connection this strong, it would not be unreasonable to assume that Tarte is benefiting not only from buzz online surrounding Anastasia but from its retail success as well.

# *ANALYSIS*



# HIERARCHIES OF INFLUENCE:

## **THE NEW CELEBRITY INFLUENCER**

Influencer marketing has forever changed the beauty landscape and the way brands communicate with consumers. The phenomenal impact of this new wave marketing has left many marketing executives rethinking their digital budgets for the new year with greater allotments for sophisticated influencer programs over PPC and SEM initiatives.

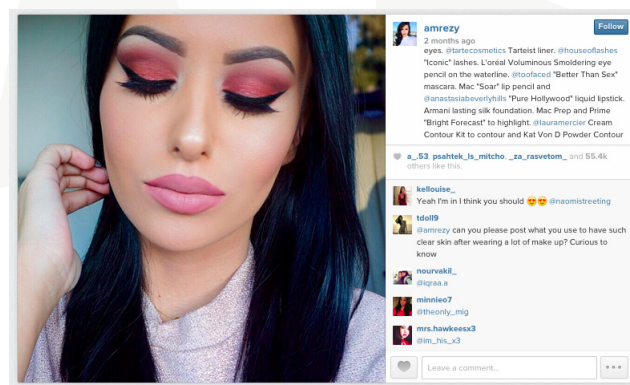
For those brands knee-deep in clarifying their influencer program's strategy, over the past few months we've seen a fresh class of influencers gaining traction amongst consumers. This community of new celebrity influencers has served as a catalyst for the success of brands widely recognized as Beauty's rising stars.

A majority of the action is taking place a tier down from the Michelle Phan's and Bethany Moda's, now household names and celebrities in the traditional sense of the word. The new celebrity influencer includes those bloggers who have acquired a commensurate celebrity status based on follower count and reach, but who consumers can still identify with as objective beauty enthusiasts like themselves. This balancing act of playing the authoritative expert and trustworthy friend is what gives these individuals a powerful voice in dictating which brands succeed in social.

To say that these influencers have incredible sway in dictating the next "it" brand would not be an embellishment of their clout. To be included in an Instagram post published by an influencer like @amrezy ( 2.3M followers) is an indication of status - that a brand has broken into an exclusive inner circle of popularity in the publics' eye. Repeated inclusion in this type of content is far more valuable for a brand than an article devoted entirely to its latest product launch in a Glamour Magazine equivalent.

Those brands dominating the earned media space have secured the good graces of this community. Digital strategies focused on these influencers' incorporation of products into Instagram posts or YouTube tutorials have allowed brands like NYX Cosmetics and Anastasia Beverly Hills to climb to the social influence ladder in a matter of months.

For quantitative proof of this phenomenon, we reran February's overall EMV numbers for our La Mode Top 10, to include content created exclusively by influencers and bloggers (i.e. excluding industry publications and blogs). Brands like Anastasia and MAC maintained their generous lead over the others, indicating that a majority of the valuable content being created about these brands is the result of activity surrounding these celebrity influencers, not with the substantial built-in following enjoyed by magazines, fashion blogs, etc.



There are a number of ways brands can benefit from the influencer-centric strategy used by Anastasia, now making waves for Tarte Cosmetics. The primary driver of the later's success amongst this community has been its association with popular brands favored by these influencers. Instagram posts, however simple and formulaic they may appear, can help brands establish meaningful points-of-parity with competitors already succeeding within the space - the MAC's, Anastasia's, NYX Cosmetics', etc.

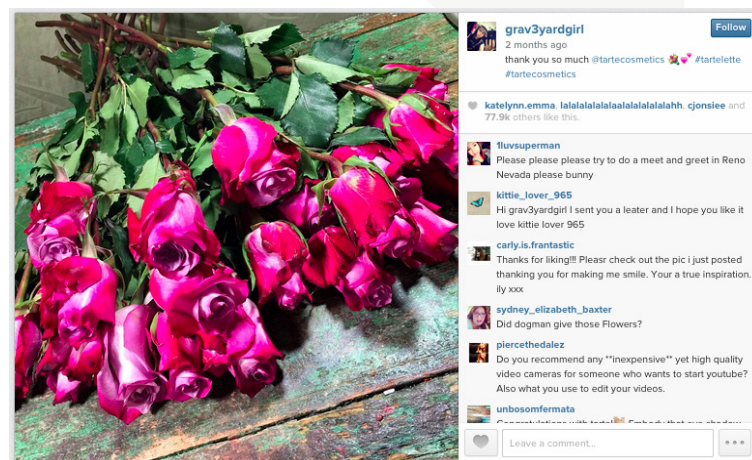
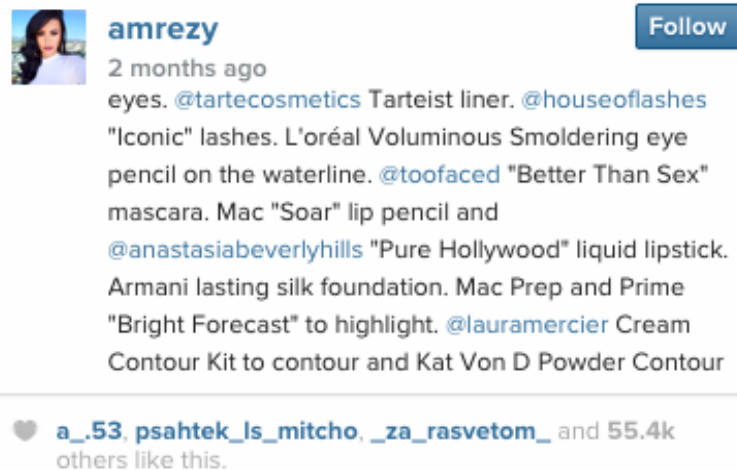
These brand-to-brand associations can manifest in a number of forms. Associations with specific trends, i.e. contouring, can provide relevance to a brand within its target demographic. As in the case of Anastasia and MAC, they can also help create or reinforce brand personality and values when a brand is being considered next to its aspirational competitor. These comparisons are what enhance the "human element": what makes a brand likable or relatable, and future personally-meaningful marketing possible.

Finally, associations advanced by influencers can have a significant impact at the sales level, influencing consumer purchase decisions. Whether or not the connection is a conscious one, consumers are all the more likely to recognize and try a new product when it is recommended by a trusted influencer, especially when it has been endorsed alongside products they've personally already incorporated into a daily regimen.

Of course, by focusing on brand associations we are only scratching the surface of evaluating the celebrity influencer's impact. As we saw with Tarte, the power of these brand associations is in augmenting general awareness. However, relying solely on these associations is limiting when it comes to communicating unique brand elements. Brand associations leverage brand equity but should stop short when there is the potential of diluting brand identity. For this reason, a brand should also engage in more intimate relationships with individual influencers whose personal brand aligns with its own.

Tarte's relationship with @grav3yardgirl is a perfect example of this kind of one-on-one partnership. The brand has elevated the influencer's authority and grown her following, providing her with ample Tarte products and other gifts to support her content creation. The influencer's eccentric and playful attitude towards beauty and style compliments Tarte's brand personality, creating points-of-difference to make it stand out from competitors.

In both examples, product seeding plays a significant role in sparking conversations with this community; a small price to pay for the value of the resulting content. Patterns in the growth of brands now looked to as digital innovators suggest that commitment to fostering relationships with new celebrity influencers is the secret to success in social.



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