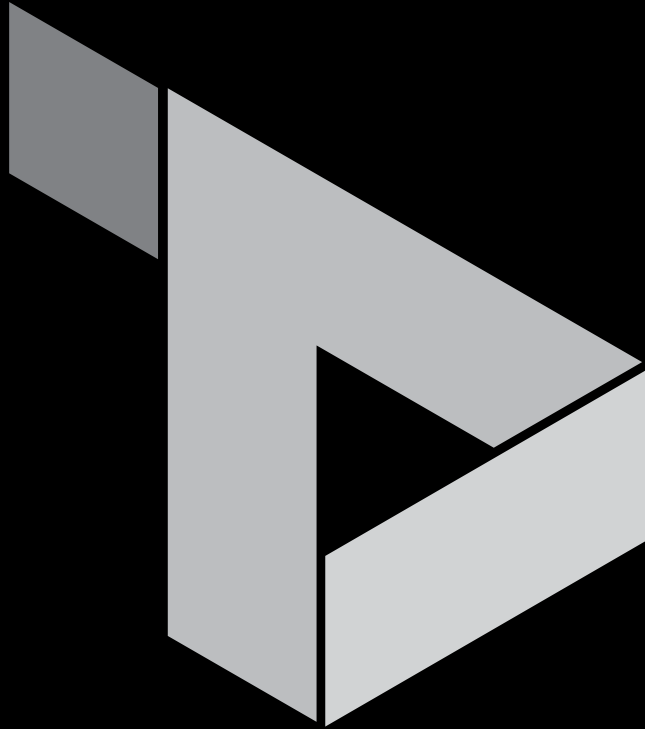# LA MODE MONTHLY

TRIBE DYNAMICS

MARCH 2015

TRIBE DYNAMICS

DATA ANALYSIS: CHRISTINA GOSWILLER

DESIGN: JORDYN ALVIDREZ

MARCH

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. We have created these reports to 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 generating the most valuable earned media over time, visibly outperforming the competition on a variety of social channels.

The data for this study was collected by Tribe Dynamics, and drawn from the top 50,000 influencers in the beauty, fashion, and lifestyle spaces. The brands and products included in each month's study are those that we have determined the most popular, informed by publicly available information on brand annual revenues, and reviews from consumers and third-party retailers.

DOWNLOAD REPORTS AT 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.

CONTENTS

THE TOP 10

OVERALL EARNED MEDIA PERFORMANCE

For the month of March, the following 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 $29,089,171 EMV

2. ANASTASIA BEVERLY HILLS $18,313,177 EMV

3. NYX $13,338,774 EMV

4. TOO FACED $12,192,409 EMV

5. NARS $12,137,090 EMV

6. L'OREAL PARIS $10,554,238 EMV

7. MAKE UP FOR EVER $10,444,891 EMV

8. MAYBELLINE $8,285,585 EMV

9. URBAN DECAY $8,234,936 EMV

10. KAT VON D $7,815,015 EMV

0	5,000,000	15,000,000	30,000,000

MAC

ANASTASIA BEVERLY HILLS

NYX

TOO FACED

NARS

L'OREAL PARIS

MAKE UP FOR EVER

MAYBELLINE

URBAN DECAY

KAT VON D
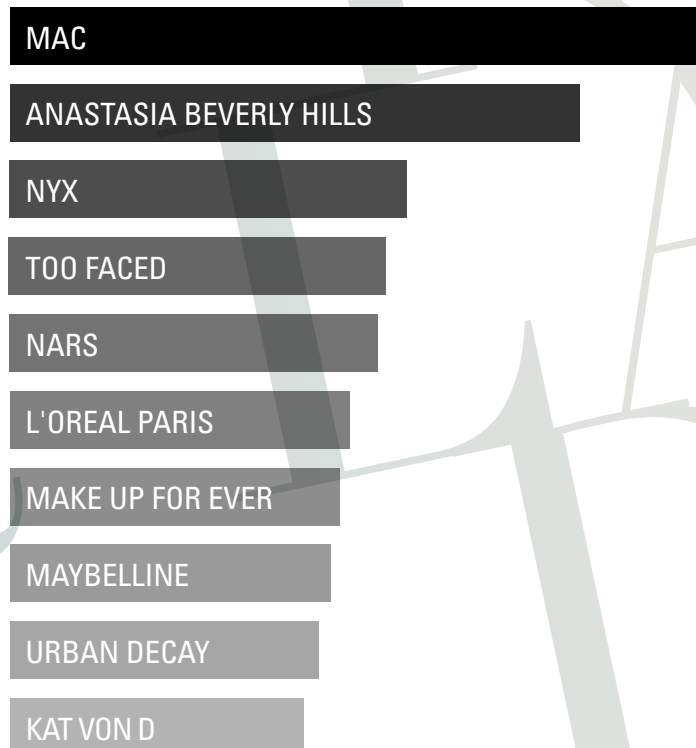
MASS MARKET	PRESTIGE
$32,178,596	$98,226,689
	205.25%

March earned media reflected the prevalent sentiment felt by the modern beauty consumer: they want "more" from their interactions with brands.

The evolution of the brand-consumer relationship means that brands are being evaluated against an entirely new criteria of demands. The brands who have risen to the challenge have established meaningful relationships characterized by two primary approaches: emotional connections and sharing of expertise.

These concepts are mutually reinforcing when it comes to constructing a rich brand personality with both human sentiment and specialized knowledge. The goal of all influencer marketing activities should be to share the brand's narrative through intimate experiences designed for personal resonance and empowering the individual with education.

The steady rise of NYX Cosmetics, alongside the growth of brands like Make Up For Ever, is owed to the elasticity of abstract brand elements that fuel these kinds of meaningful connections. Specifically, these brands have used their association with professional artistry to provide holistic experiences to aspiring influencers that both elevate and educate. Adapting those characteristics and values with resonance amongst professional artists to widely accessible experiences on social media has helped position these brands as nurturing industry experts, whose core focus is transferring professional knowledge to the everyday beauty enthusiast.
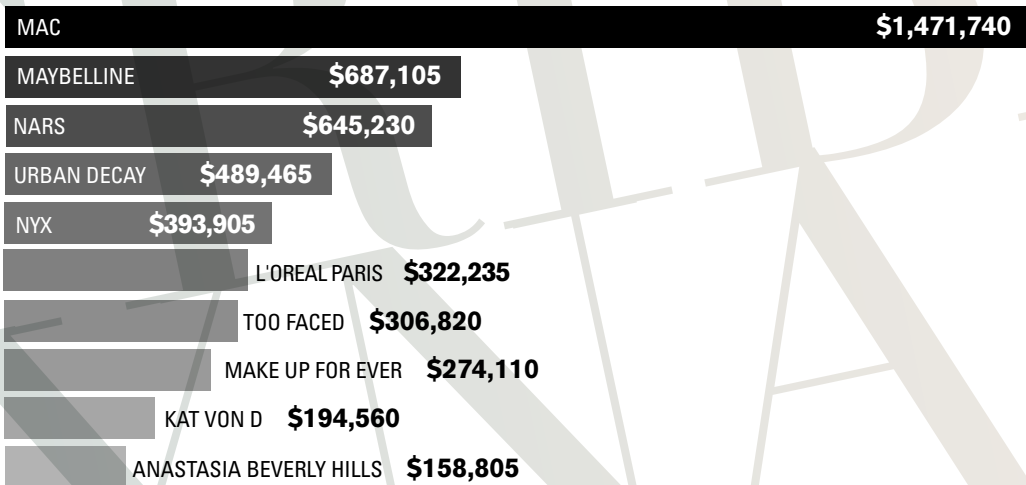
THE TOP 10
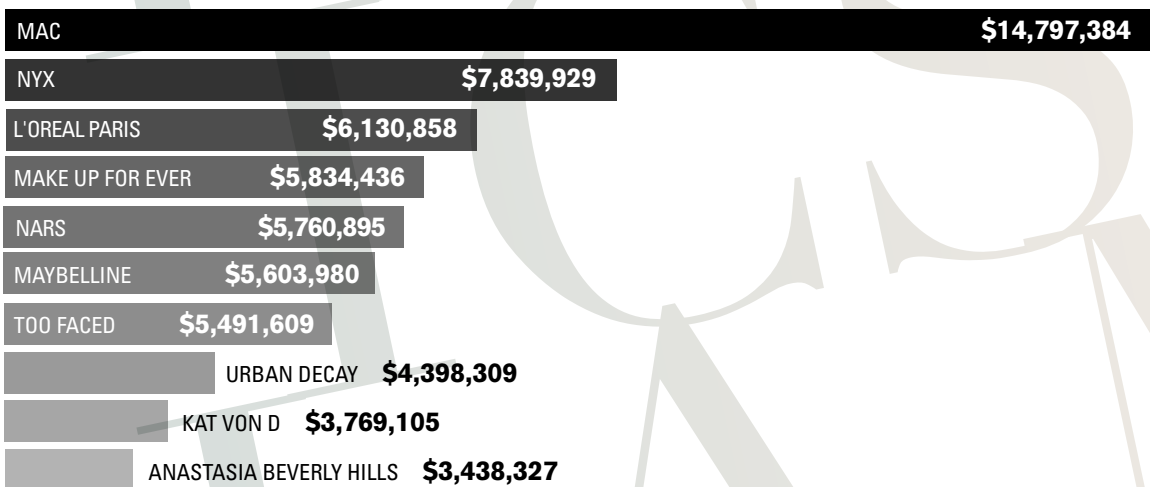
**EARNED MEDIA VALUE
PERFORMANCE BY CHANNEL**

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

BLOG

MAC	$1,471,740
MAYBELLINE	$687,105
NARS	$645,230
URBAN DECAY	$489,465
NYX	$393,905
L'OREAL PARIS	$322,235
TOO FACED	$306,820
MAKE UP FOR EVER	$274,110
KAT VON D	$194,560
ANASTASIA BEVERLY HILLS	$158,805

YOUTUBE

MAC	$14,797,384
NYX	$7,839,929
L'OREAL PARIS	$6,130,858
MAKE UP FOR EVER	$5,834,436
NARS	$5,760,895
MAYBELLINE	$5,603,980
TOO FACED	$5,491,609
URBAN DECAY	$4,398,309
KAT VON D	$3,769,105
ANASTASIA BEVERLY HILLS	$3,438,327

TWITTER

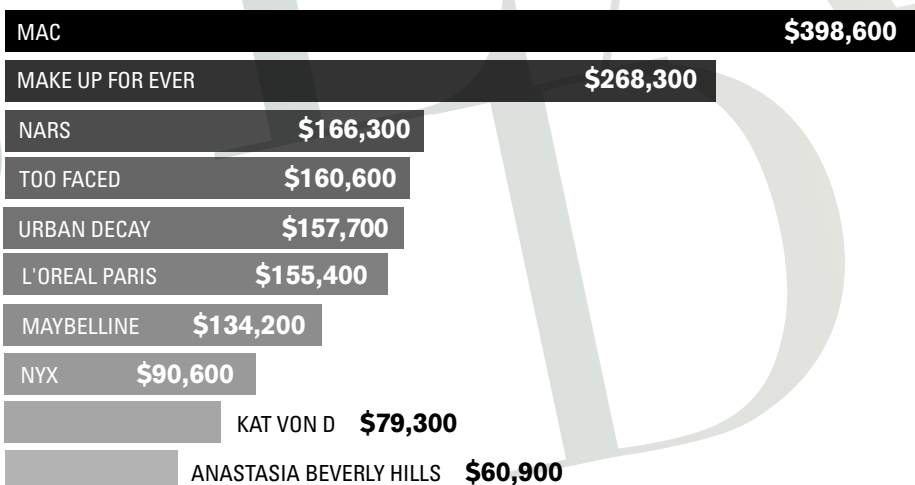|	
MAC	$398,600
MAKE UP FOR EVER	$268,300
NARS	$166,300
TOO FACED	$160,600
URBAN DECAY	$157,700
L'OREAL PARIS	$155,400
MAYBELLINE	$134,200
NYX	$90,600
KAT VON D	$79,300
ANASTASIA BEVERLY HILLS	$60,900

MAKE UP FOR EVER BENEFITS FROM BRAND ELASTICITY

Even though the brand's name was misspelled or misused by influencers about a third of the time, Make Up For Ever's burgeoning awareness amongst everyday beauty consumers guaranteed its inclusion in our March La Mode Top 10.
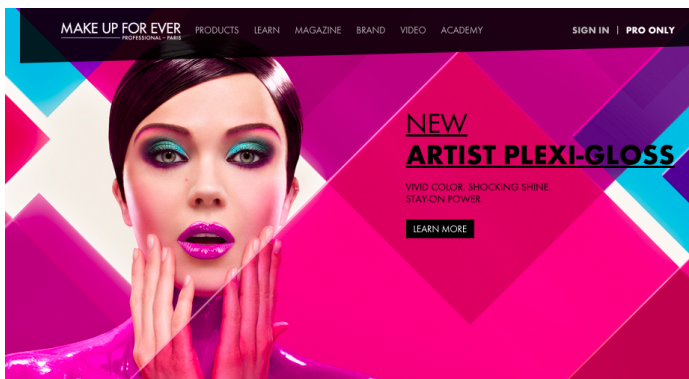
Traditionally, the brand has excelled with professional makeup artist content creators, responsible for much of the brand's high-engagement content. However, the brand's performance in March tells a different story. Both aspiring YouTube vloggers and Sephora-addicts contributed significantly to the brand's $10.4M in EMV for the month.

The brand's growing foothold in both the professional and consumer communities was highlighted by the contrast in content created on Instagram by professionals versus that on YouTube by vloggers.

On YouTube, the brand's "High Definition Foundation" was a clear favorite amongst non-professional enthusiasts. The product was frequently featured in Sephora haul videos, living up to its 13,468 reviews and 130K "loves" on the retailer's website recorded at the time this report was written. There was greater variance in the style and tone of this content: Vloggers ranged from more mature influencers creating heavily made up looks, to those who were younger and incorporated the brand into upbeat tutorials for teen-appropriate makeup looks.
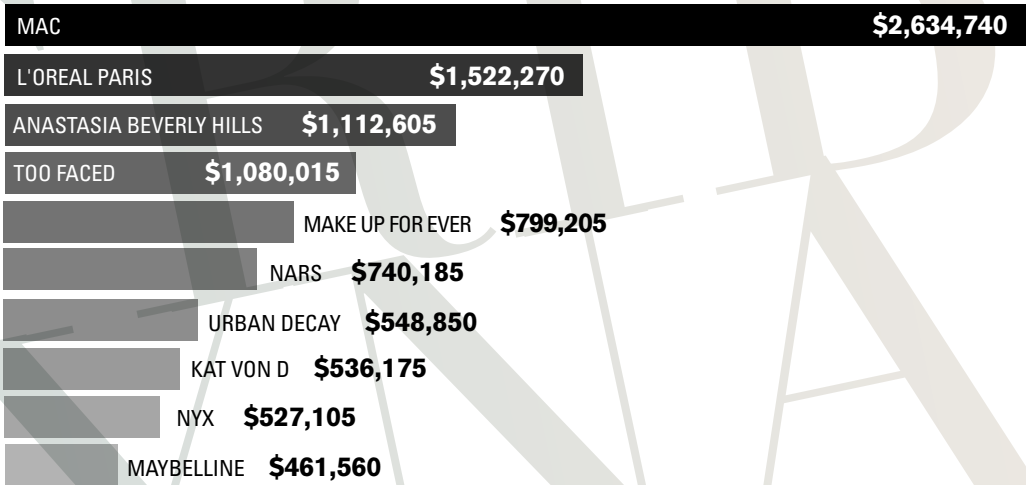
By contrast, Instagram content captured the brand's professional roots as professional artists published photos showcasing newly released products like the "Skin Equalizer" primer. Instagram posts shared behind-the-scenes experiences of makeup artists engrossed in their work. The overwhelming engagement with professional promotion of the product on Instagram signifies the increasing appeal of professional imagery to modern consumers, whose interests extend beyond a product level to the sense of pride felt from learning and mastering techniques.

The professional imagery that characterized this content reinforced Make Up For Ever's association with excellence in artistry within an easily-digestible social medium. The behind-the-scenes look at the life of a professional made sense of the brand's identity in a way that was relatable to a larger audience. In the past, brand positioning pivoted around professional artistry would have alienated a significant portion of general consumers. However, Make Up For Ever's rising influence highlights how new social touchpoints like Instagram provide an intimate brand experience that implicates the individual in brand stories that might otherwise be unrelatable.
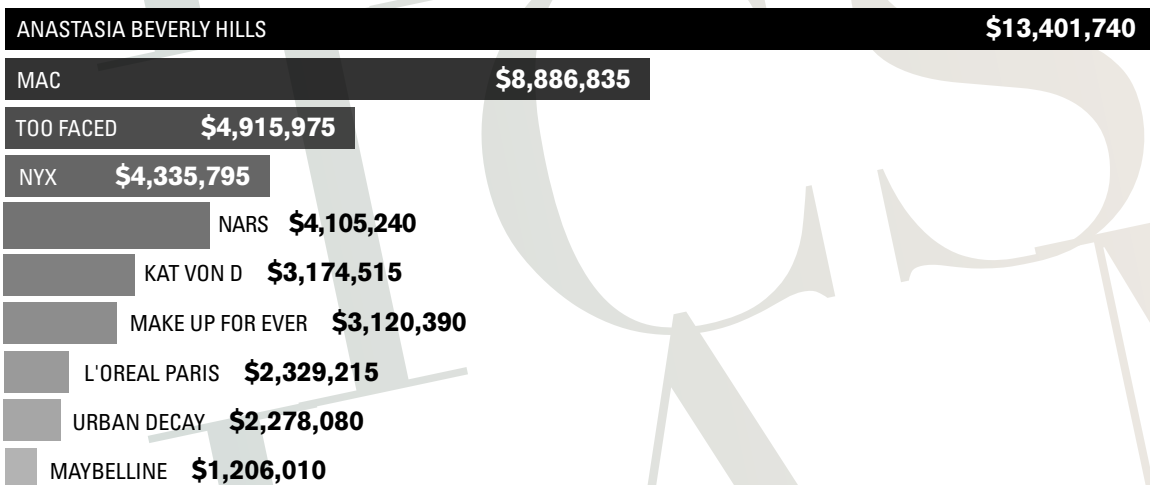
FACEBOOK

MAC	**$2,634,740**
L'OREAL PARIS	**$1,522,270**
ANASTASIA BEVERLY HILLS	**$1,112,605**
TOO FACED	**$1,080,015**
MAKE UP FOR EVER	**$799,205**
NARS	**$740,185**
URBAN DECAY	**$548,850**
KAT VON D	**$536,175**
NYX	**$527,105**
MAYBELLINE	**$461,560**

INSTAGRAM

ANASTASIA BEVERLY HILLS	**$13,401,740**
MAC	**$8,886,835**
TOO FACED	**$4,915,975**
NYX	**$4,335,795**
NARS	**$4,105,240**
KAT VON D	**$3,174,515**
MAKE UP FOR EVER	**$3,120,390**
L'OREAL PARIS	**$2,329,215**
URBAN DECAY	**$2,278,080**
MAYBELLINE	**$1,206,010**

PINTEREST

MAC	**$901,840**
NARS	**$719,240**
URBAN DECAY	**$364,500**
TOO FACED	**$237,390**
MAYBELLINE	**$192,730**
NYX	**$151,440**
MAKE UP FOR EVER	**$148,450**
ANASTASIA BEVERLY HILLS	**$140,800**
L'OREAL PARIS	**$94,260**
KAT VON D	**$61,360**

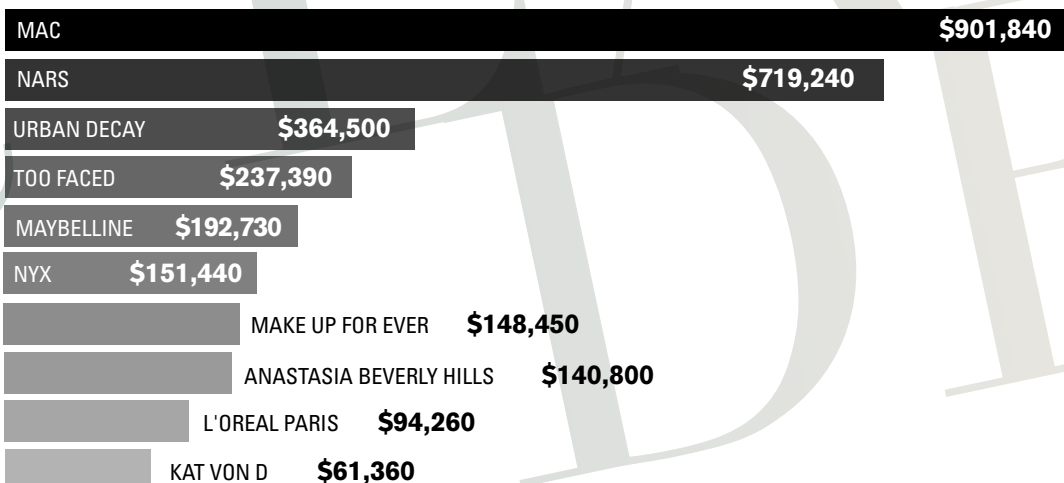## NYX COSMETICS CAST AS AN AFFORDABLE ALTERNATIVE ON YOUTUBE

We've discussed in the past how NYX Cosmetics benefits from its aesthetic association with prestige brands, specifically MAC, Anastasia Beverly Hills, and, more recently, Kat Von D. Over time, consumer associations of NYX's style and personality with these prestige brands have translated into its unmatched inclusion in user-generated content alongside these top brands. Points-of-parity have catapulted NYX to a reserved spot amongst the top five on our La Mode list, with social influence that has yet to be achieved by any other mass market brand.

Each day, NYX becomes further established in this inner circle of well-respected brands. At a more affordable price-point, NYX is overwhelmingly recognized by the influencer community as the go-to brand for alternatives to trending prestige products. NYX was by far the most frequently featured mass market brand in YouTube videos, as demonstrated by its $7.8M in EMV for the channel alone in March. The brand was also a winner amongst tutorials specifically geared towards helping followers find inexpensive alternatives to iconic prestige products like MAC's Longwear Foundation or Anastasia's Liquid Lipstick.

In March, the brand's lip products were endorsed more than any other product type; its Matte Lipstick and Soft Matte Lip Cream directly compared to cult favorites like Kat Von D's "Lolita" shade in lipstick and lipgloss. Influencers with drastically different tastes and audiences creating content about the brand on YouTube pointed to the brand's cross-segment wide appeal. The brand is being positioned by NYX loyalists in both segments as a leader in conversations surrounding the hottest lip trends, like the revival of 90's lipliner and fuller, pouty lips inspired by Kylie Jenner.

NYX's success on YouTube is even more interesting viewed alongside Anastasia's relative under-performance on the channel. On Instagram, the latter's new Liquid Lipstick has become a favorite amongst prominent influencers featuring these same trends. However, the brand has yet to produce equivalent EMV on YouTube or mobilize mid-tier influencers creating video content for the everyday beauty enthusiast. Discrepancies in performance between these two aesthetically similar brands suggest something about the nature of each brand's relationships with influencers. NYX's brand resonance is intensely felt by die-hard fans campaigning for the brand online, while Anastasia's sweeping brand awareness implicates a broader salience and recognition tied to product categories and trends.
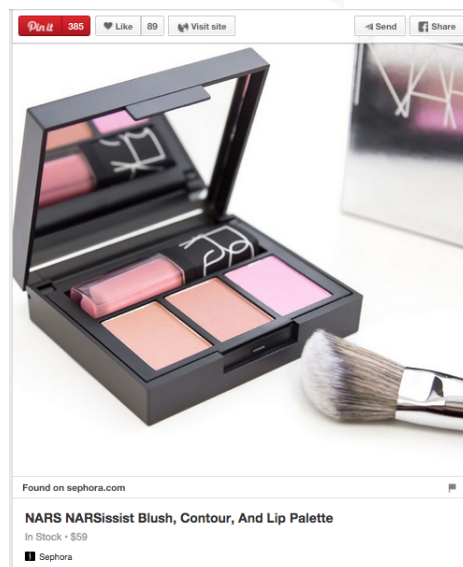
NARS BENEFITS FROM PINTEREST AS A SHOPPING PORTAL

NARS finished second on Pinterest with a commanding performance fueled by both popular lifestyle influencers leading conversations on the channel, as well as retailers like Sephora and Nordstrom. Over the past six months or so, content on Pinterest has seen increased engagement rates as more and more consumers adopt the channel as their primary tool for product discovery.

Content created about the brand followed the same pattern: product image, brief description, and a shoppable link to a retailer. The top ten Pinterest posts in EMV created about NARS featured a variety of products, from nail lacquer in trending new shades to new products like the brand's Multi-Purpose Stick and Blush, Contour, Lip Palette. Of these ten, five posts were published by Sephora and one by Nordstrom. The other posts came from influencers who have built substantial followings on Pinterest specifically, like Sugandha Singh (3.4M followers) and Alexandra Evjen (9.5K followers).

NARS was also a favorite on collaborative boards, shared and followed by a diverse group of content creators. Its inclusion on these boards demonstrates the substantial awareness for its brand as a prominent player in conversations related to beauty, fashion, and style more generally. Given Pinterest's new launch of "buyable pins," the breadth of brand recognition for NARS on the channel will prove to be incredibly valuable if Pinterest successfully transitions into a legitimate mediator between consumers and retailers.


Found on thequeenofthenail.com

Found on ommorphiabeautybar.com

Found on sephora.com

NARS NARSissist Blush, Contour, And Lip Palette
In Stock • $59

Sephora

TRENDING EARNED MEDIA PERFORMANCE:

EARNED MEDIA VALUE

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

TRENDING EMV PERFORMANCE

JANUARY - MARCH 2015
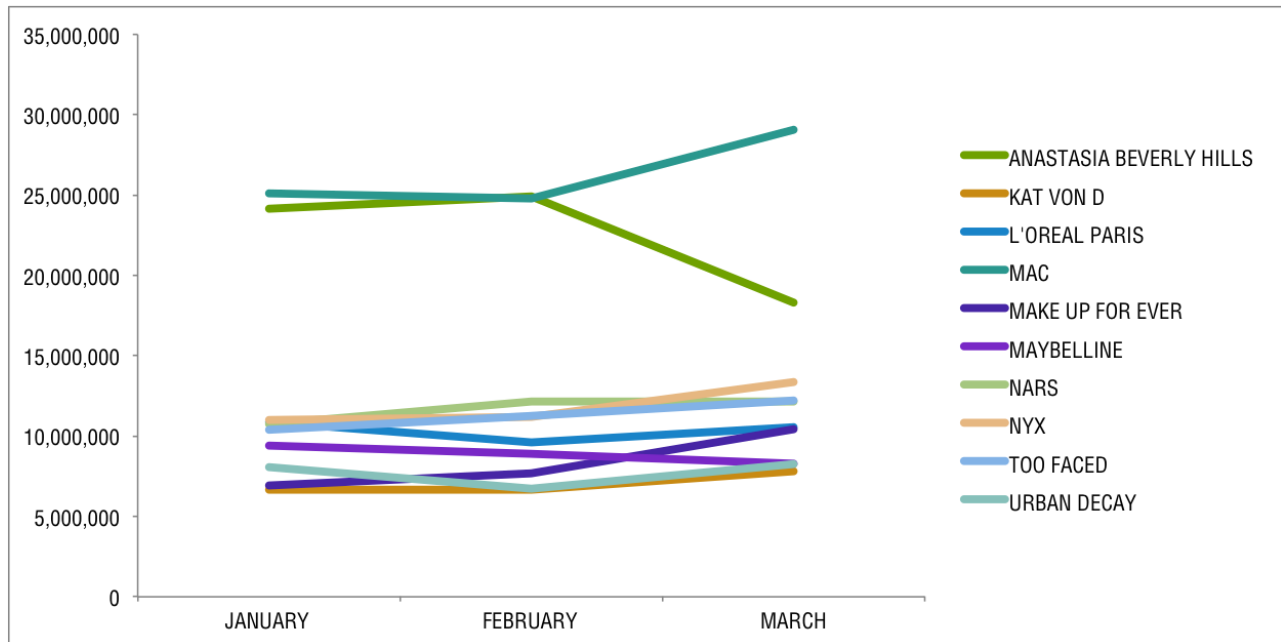
BRAND	JANUARY	FEBRUARY	MARCH	JAN-MARCH	FEB-MARCH
ANASTASIA BEVERLY HILLS	24,144,816	24,917,372	$18,313,177	-24.15%	-26.50%
KAT VON D	6,638,977	6,677,239	$7,815,015	17.71%	17.04%
L'OREAL PARIS	10,876,871	9,611,940	$10,554,238	-2.97%	9.80%
MAC	25,121,877	24,777,402	$29,089,171	15.79%	17.40%
MAKE UP FOR EVER	6,930,576	7,658,575	$10,444,891	50.71%	36.38%
MAYBELLINE	9,404,052	8,923,634	$8,285,585	-11.89%	-7.15%
NARS	10,729,364	12,153,744	$12,137,090	13.12%	-0.14%
NYX	10,997,428	11,225,181	$13,338,774	21.29%	18.83%
TOO FACED	10,397,101	11,266,829	$12,192,409	17.27%	8.22%
URBAN DECAY	8,063,020	6,713,816	$8,234,936	2.13%	22.66%

Make Up For Ever showed by far the greatest improvement over Q1 of 2015. Between January and March the brand experienced an approximate 51% increase in overall EMV thanks to its growing community of active and engaged consumers. Anastasia continues to be a leader in earned media performance, however it's month over month growth may be less drastic than in the past. The decline in Anastasia's EMV is due to a slight adjustment of the value attributed to individual Instagram posts based on exceptional engagement metrics for the channel. With Instagram posts easily reaching 20 - 40K likes on average, the value of a single like although valuable, should have relatively small impact on overall EMV. Anastasia's strong performance on Instagram despite this adjustment speaks to the incredible awareness for its brand on the channel.
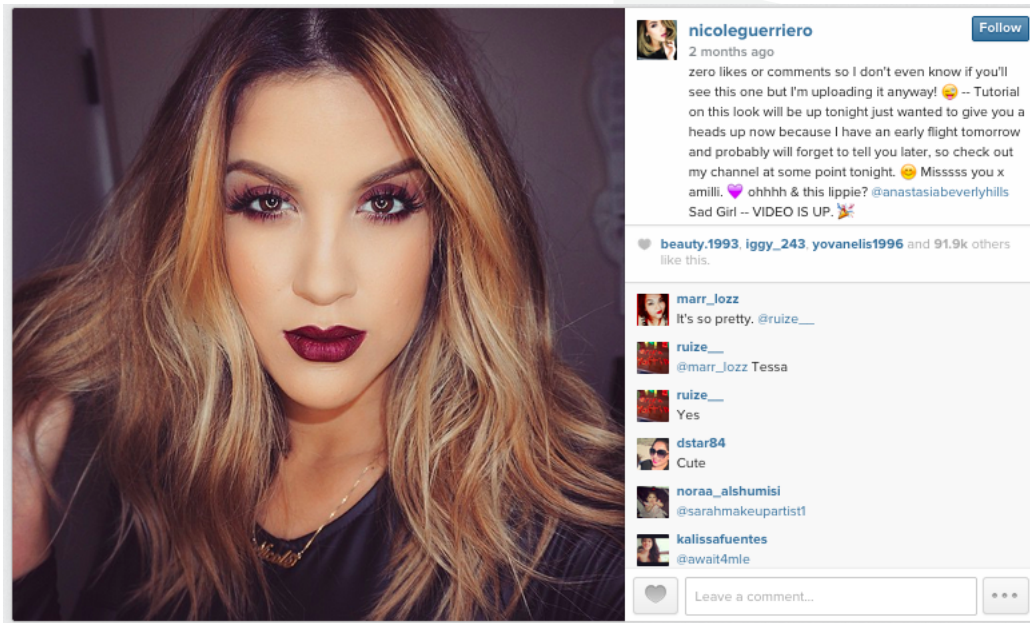
EARNED MEDIA TERMS

The following data represents the approximate value of the earned media driven by a recently released product for each of the La Mode Top 10 brands for March.

NEW PRODUCT PERFORMANCE

1. Liquid Lipstick (Anastasia Beverly Hills): $4,442,894

2. Cinderella Collection (MAC Cosmetics): $1,655,169

3. Studded-Kiss Lipstick in Lolita (Kat Von D): $758,125

4. Fit Me Dewey + Smooth Foundation (Maybelline): $576,372

5. Eyeshadow Primer Potion (Urban Decay): $530,660

6. Soft Matte Lip Cream (NYX Cosmetics): $478,105

7. Melted Metal (Too Faced): $473,400

8. Dual-Intensity Blush (NARS Cosmetics): $321,090

9. La Palette Nude (L'Oréal Paris): $191,415

10. Equalizer (Make Up For Ever): $164,715

ANALYSIS

GIVING CONSUMERS MORE:

INFLUENCER PROGRAMS & MEANINGFUL RELATIONSHIPS

While the modern consumer is often criticized for selfishness or entitle-
ment, perhaps exemplified by the selfie phenomenon, marketers should
consider the circumstances that created this climate of consumption.
The profusion of choice overwhelms the consumer; it is difficult for a
brand to make an impact without a unique value proposition that cuts
through the white noise of advertising messages and forges a personal
relationship. Brands that anticipate and tend to the consumer's unique
desires and needs are the ones that succeed, outside the parameters of
the conventional brand-consumer relationship.

Influencer programs are in many ways the marketing world's response to
the changing dynamics of this relationship. Primarily, the shift in power
from the brand to the consumer, whose preferences impactfully direct
marketing initiatives and brand evolution overtime. Done well, influenc-
er programs should first and foremost elevate the individual through ex-
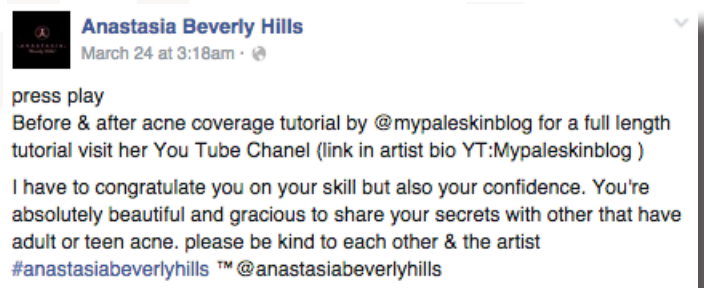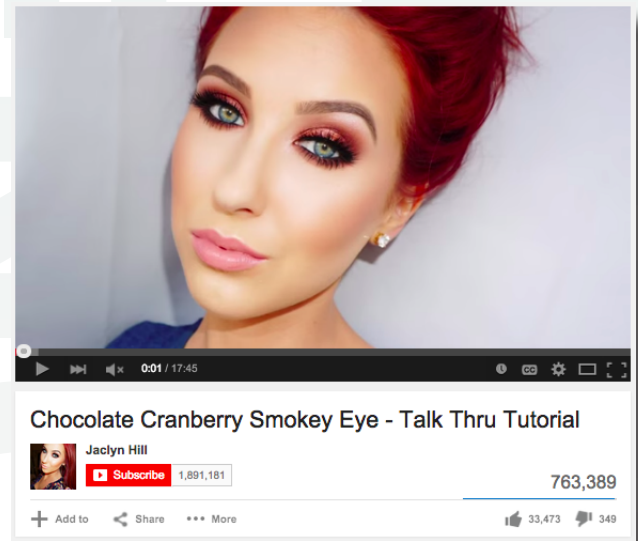periences that make them feel implicit in the brand's story.
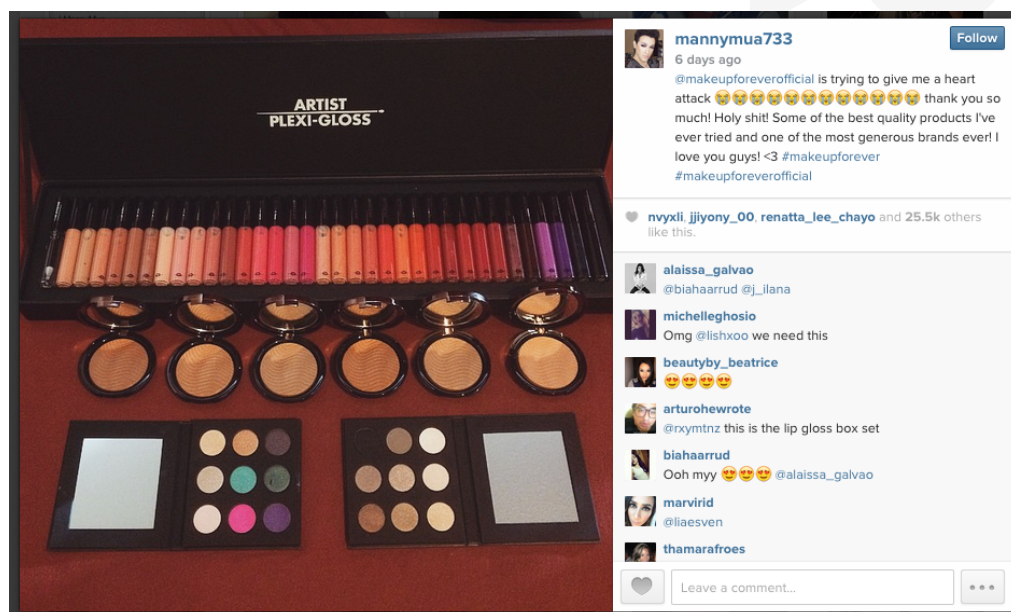
This hyper-focus on the individual helps brands zero in on the kinds of call-to-actions that drive the two characteristics of meaningful relationships introduced at the outset of this report: emotional connections and sharing of expertise. To the first characteristic, when influencers are surprised with a product send it triggers an emotional reaction that if nurtured by the brand through continued engagement can lead to a sustainable relationship. The more personalized the experience inside the package, the better. Thoughtfully designed gifts stimulate a sense of trust that positions brands to benefit from the second characteristic: education and expertise.

Brand experiences that impart knowledge show a more tangible investment in the individual. From a data perspective, gifts that include instructional content often drive significantly more engagement than those that do not. Inserts that point to professional tips, technique, and additional tutorials online inspire ongoing conversations with the influencer around multiple brand touchpoints. Multiple consistent encounters with the brand both offline with the product send and online support a richer understanding of the brand as less of an entity but instead as a quasi-friend.

With limitless information available online, consumers can easily research new products, ingredients, popular trends, etc. In reality, consumers are constantly inundated with this information through the massive presence of advertorial and promotional content circulating. In the case of expertise sharing with product sends, offering "more" requires a more hands-on education that, as perceived by the influencer, will help them perfect popular makeup trends. For aspiring influencers most interested in growing their follower count, the more they can learn from a brand's expertise, the greater the pool of compelling, unique content they can pull from to create tutorials. This increases the brand's chances that the influencer will create valuable content setting off a chain reaction of greater engagement: views, likes, shares, and new followings.

When designing individual product sends or influencer programs more broadly, brands should place emotional connections and education above objectives like product discovery or even conversion rates and sales. If the consumer dictates the evolution of a brand's identity as much as any internal force, then an investment in the growth of individuals by providing "more" is equally an investment in the brand's future. With this kind of new wave marketing, the long game promises greater brand equity.

Chocolate Cranberry Smokey Eye - Talk Thru Tutorial

Jaclyn Hill
Subscribe 1,891,181
763,389

Add to   Share   ••• More   33,473   349

Anastasia Beverly Hills
March 24 at 3:18am · 🌐

press play
Before & after acne coverage tutorial by @mypaleskinblog for a full length tutorial visit her You Tube Chanel (link in artist bio YT:Mypaleskinblog)

I have to congratulate you on your skill but also your confidence. You're absolutely beautiful and gracious to share your secrets with other that have adult or teen acne. please be kind to each other & the artist #anastasiabeverlyhills ™ @anastasiabeverlyhills

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