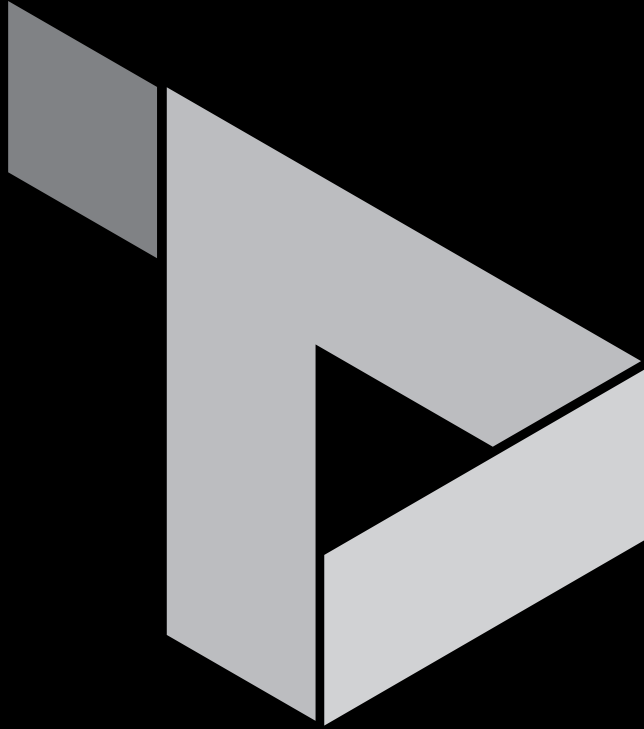


LA MODE MONTHLY

TRIBE DYNAMICS

APRIL 2015



TRIBE DYNAMICS

DATA ANALYSIS:

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APRIL

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](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 April,
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

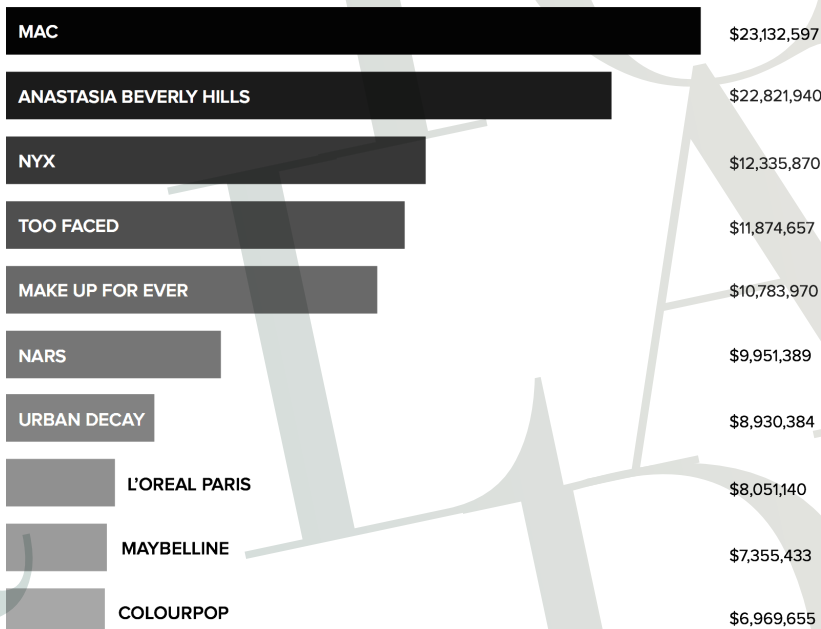
THE NUMBER OF POSTS:

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. MAC \$23,132,597 EMV
2. ANASTASIA BEVERLY HILLS \$22,821,940 EMV
3. NYX \$12,335,870 EMV
4. TOO FACED \$11,874,657 EMV
5. MAKE UP FOR EVER \$10,783,970 EMV
6. NARS \$9,951,389 EMV
7. URBAN DECAY \$8,930,384 EMV
8. L'OREAL PARIS \$8,051,140 EMV
9. MAYBELLINE \$7,355,433 EMV
10. COLOURPOP \$6,969,655 EMV



MASS MARKET
\$34,712,098

PRESTIGE
\$87,494,937
152.06%

THE TOP 10 - EARNED MEDIA VALUE LEADER BOARD

In March we discussed how customers wanted “more” than the traditional brand-to-consumer relationship, be it through the sharing of expertise or through authentic, emotional connections. Looking at April’s data, inclusive engagement emerged as a focus amongst the brands leading the set in growth. Both Make Up For Ever (MUFE) and ColourPop excelled at engaging the influencer and everyday consumer through their commitment to an inclusive attitude and accessible conversations. While exclusivity has its place in the strategy guiding influencer programs and brand loyalty, these two brands proved that inclusive storytelling drives higher engagement through appeals to artistry and close, meaningful relationships.

MUFE gives the consumer the knowledge and tools to achieve a level of professional artistry in everyday life. They maintain their associations with the high-brow world of contemporary art, but consistently communicate that art — in the form of makeup — should be a part of every user’s life. Consequently, MUFE’s products are treated as necessary to achieving the professional makeup look, yet do not alienate users who do not have professional training. NARS, through their Christopher Kane collection, also attempted to solidify their brand identity as one defined by artistry. In contrast to MUFE’s strategy, however, NARS failed to establish an ongoing conversation, maintaining instead a merely aspirational association with high fashion that was inaccessible to both influencers and consumers.

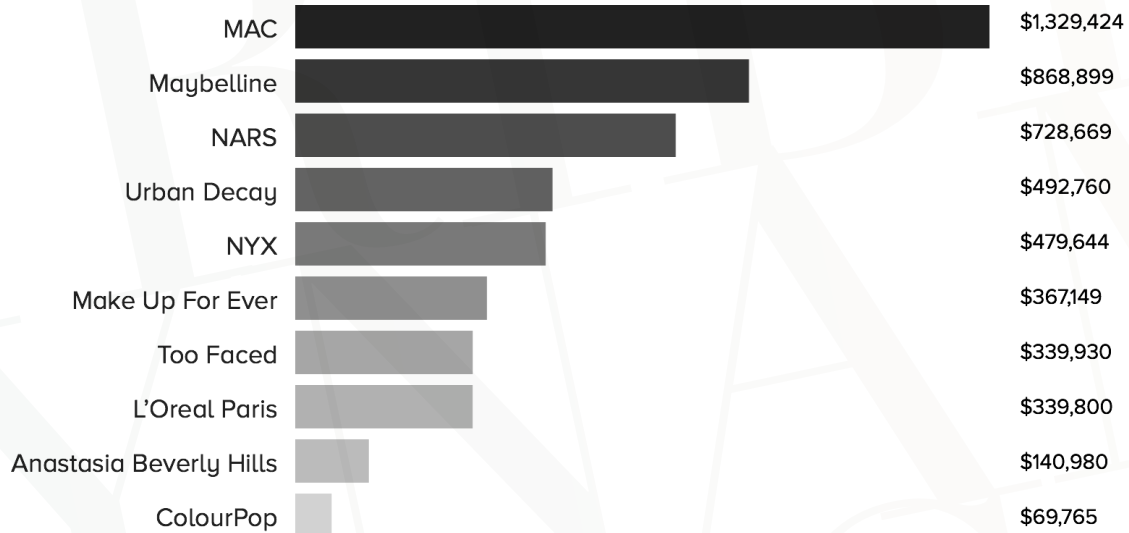
ColourPop, a company just over one year old, instead offers the consumer membership into a community that is both trendy and unique, but relatable and welcoming. ColourPop has successfully personified themselves as a real-life, relatable beauty enthusiast, interested in sustaining a conversation that extends beyond cosmetic products, into the consumer’s lifestyle and everyday interests. The company interacts with their consumers as if they were a best friend, rather than a brand. Genuinely invested, ColourPop’s active participation in both its influencer and consumer communities provides a compelling model for brands entering the influencer marketing space.

THE TOP 10

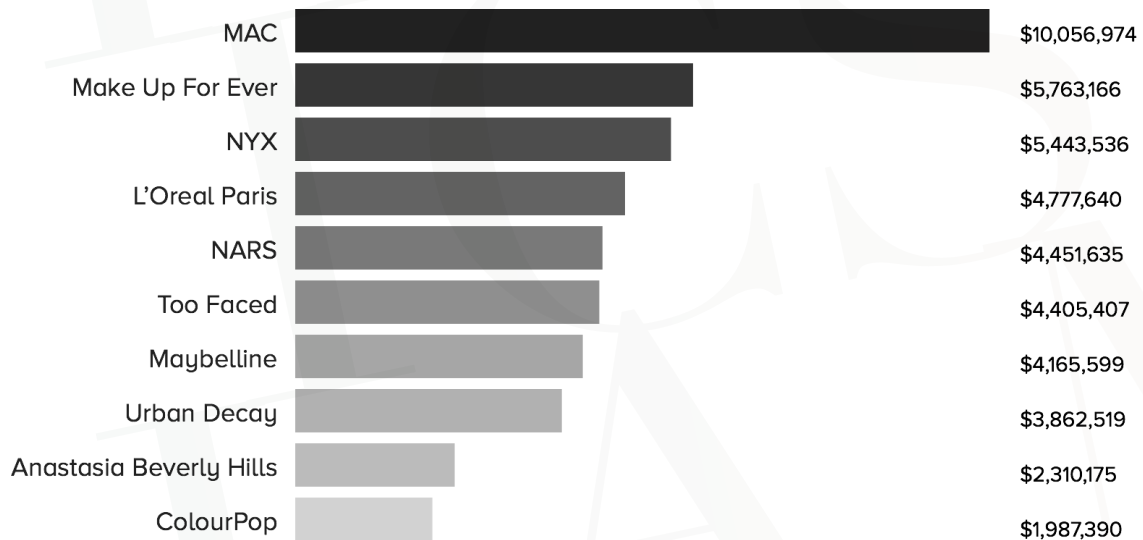
**EARNED MEDIA VALUE
PERFORMANCE BY CHANNEL**

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

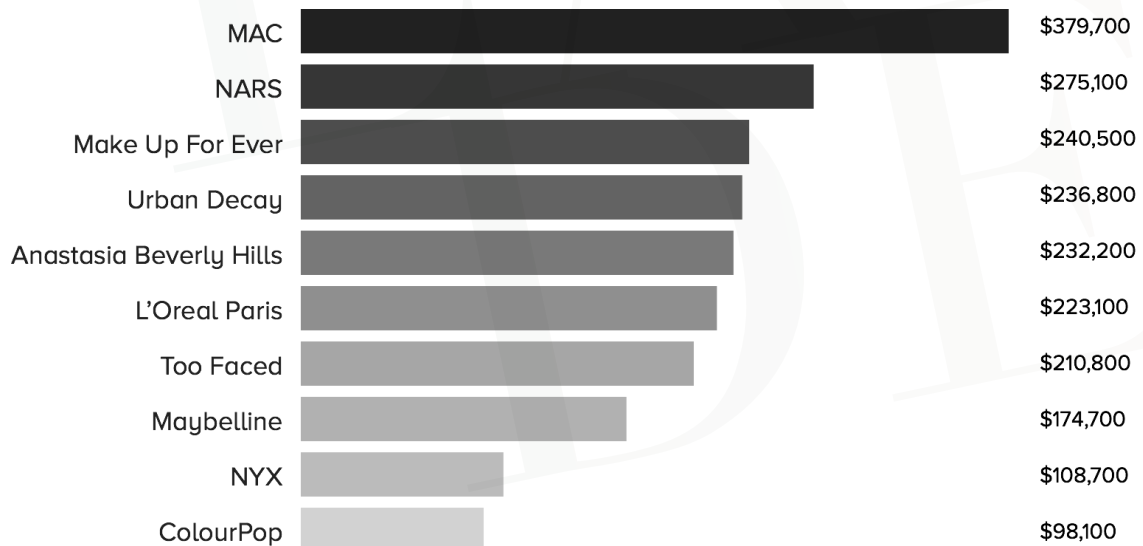
BLOG



YOUTUBE



TWITTER



MAKE UP FOR EVER ON YOUTUBE

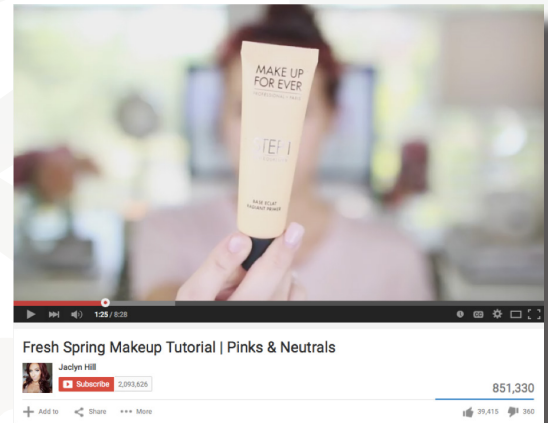
In April, Make Up For Ever established their high-end foundational products as fundamental staples for both professionals and enthusiasts alike. MUFE's steady ascension through the Top 10 rankings, from 7th place last month to 5th place this month, depended heavily on their foothold on YouTube. This month, the brand surpassed all but MAC on the channel demonstrating the salience of its artistry value proposition amongst vloggers.

The vast majority of MUFE products reviewed and used on Youtube were face products, including primer, foundation, and powder; only three of the 15 videos with the highest level of engagement mentioned lip or eye products. In fact, four of the seven vloggers responsible for making these top 15 videos created multiple videos using the same MUFE face product (either the primer, foundation, concealer, or powder). Professional makeup artist Jaclyn Hill, the user who created the top three most-viewed videos, featured the MUFE primer in two different tutorials, and explicitly praised its virtues in a third "favorites" video. When these vloggers repeatedly favor a MUFE face product, they demonstrate that the high-end foundational products are deeply embedded into their daily routines, and necessary for building a variety of different looks. In other words, a beautiful, long-lasting look cannot be made without MUFE face products as their base. Professional makeup artists like Jaclyn Hill, who themselves brand MUFE face products as integral components of their own routines in tutorial videos, help consumers establish that view: A professional, high-end look, be it a simple daytime face, or a glamorous nighttime finish, needs a high-end base.

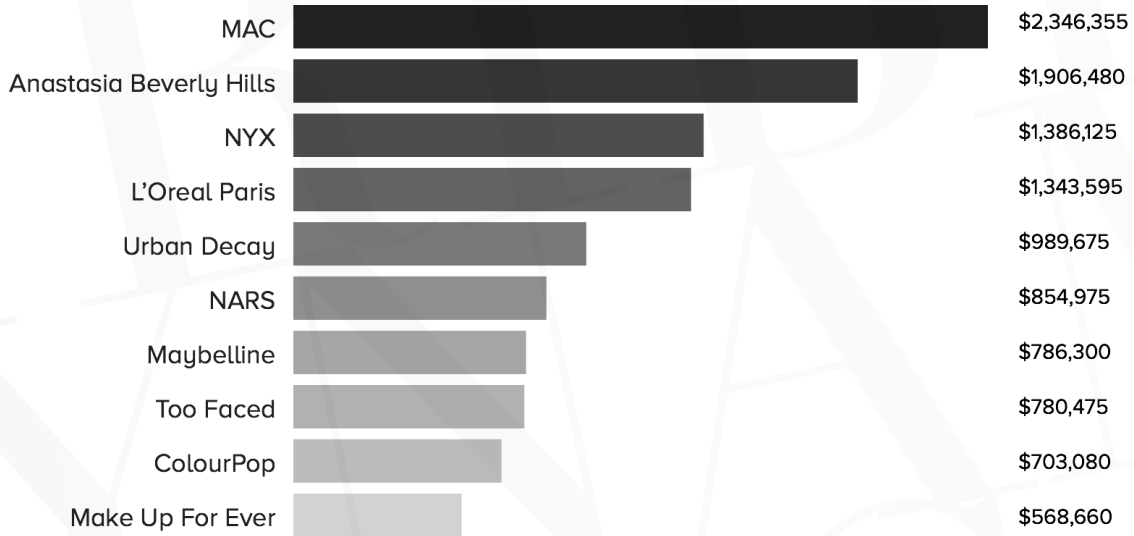
MUFE's overall connections to artistry and professional expertise were strengthened by the branding and marketing of its new lip gloss product, Artist Plexi-Gloss Lip Lacquer. MUFE founder Dany Sanz's mission statement for the brand's identity revolves around her belief that "life is a stage," and that everyone should have access to tools to be artists in their daily lives. The Artist Plexi-Gloss lip gloss, fueled by this inspiration, was a collaborative project with two contemporary artists: sculptors Peter Zimmerman and Ann Grimm.

Though the product launch occurred close to the end of the month, within a single week influencers were generating substantial content around MUFE's product sends of the complete, 35-piece collection of Artist Plexi-Gloss lip glosses. The generosity of the product send, alongside the product's sleek, professional packaging and naming collectively solidified MUFE's commitment to making artistic and professional makeup looks accessible.

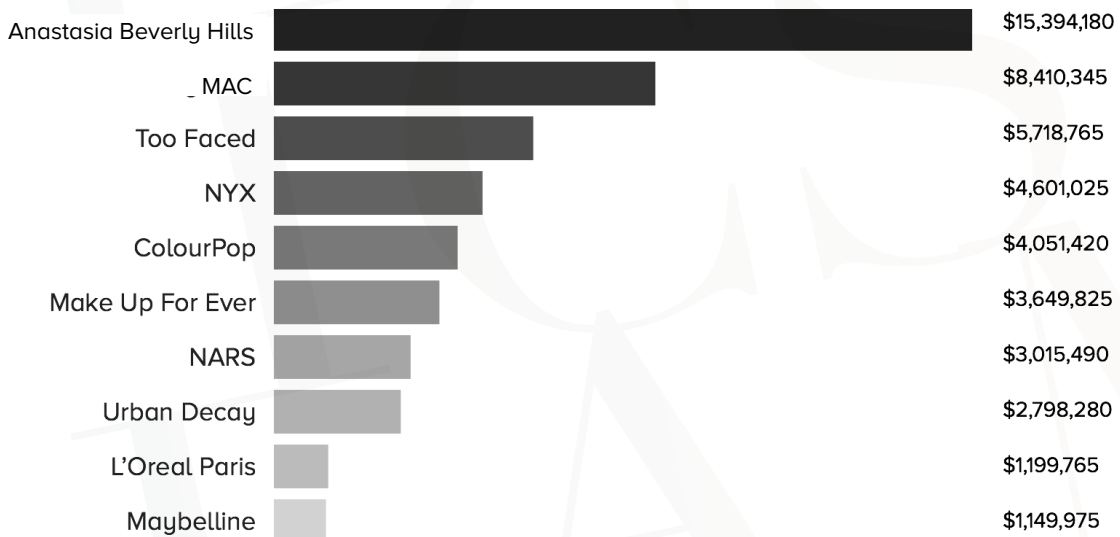
This month, MUFE leveraged both its collaboration with contemporary artists, and the Youtube support of several vloggers, to establish its foundational products as necessary for every user's daily beauty routine, no matter how simple or glam the final look might be. Creating a professional makeup look is a form of art, and with MUFE products, every user is invited and welcomed as an artist.



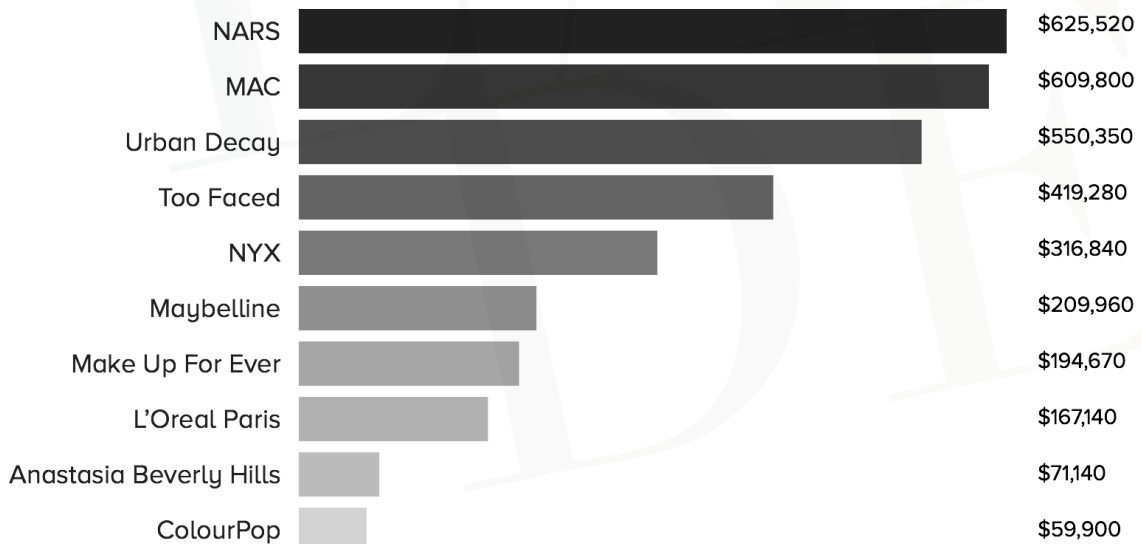
FACEBOOK



INSTAGRAM



PINTEREST



COLOURPOP INSTAGRAM

Newcomer to our La Mode Top 10 ColourPop made an impression on Instagram with \$4M in EMV, earning 5th place on the channel. In its first year, the brand has made a name for itself amongst top tier Instagram influencers, being included in posts alongside the traditionally most successful brands on the channel, Anastasia and MAC. Of the top twenty posts, eight were created by Instagram stars grav3yardgirl, amreezy, maya_mia_y, carlibel, and desimakeup (each with an Instagram following over 1.5M). Each of these influencers included ColourPop products in glam looks and product favorites and were responsible for dramatically increasing brand recognition of the young brand. A majority of the top posts highlighted the bloggers' personal collaboration with ColourPop or its newest product: Highlighters. One of these collaborations, the KathleenLights' "Where the Light is" eye shadow quartet, was a favorite amongst bloggers showing support for their fellow blogger Kathleen Fuentes. These crucial partnerships drove a substantial portion of their rise on Instagram, which will be discussed in depth in the Brand Spotlight section.

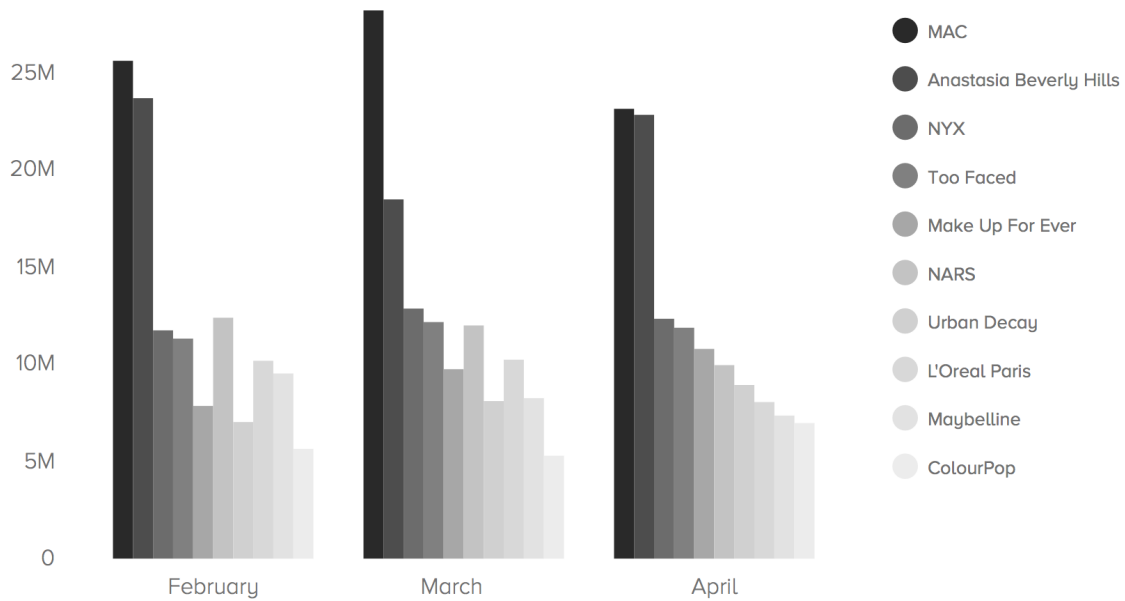


TRENDING EARNED MEDIA PERFORMANCE: **EARNED MEDIA VALUE**

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

TRENDING EMV PERFORMANCE

FEBRUARY - APRIL 2015



BRAND	FEBRUARY	MARCH	APRIL
ANASTASIA BEVERLY HILLS	\$23,678,839	\$18,473,678	\$22,821,798
COLOURPOP	\$5,640,826	\$5,290,808	\$6,969,443
L'OREAL PARIS	\$10,172,814	\$10,228,632	\$8,050,499
MAC	\$25,601,142	\$28,192,827	\$23,131,727
MAKE UP FOR EVER	\$7,851,944	\$9,740,865	\$10,783,367
MAYBELLINE	\$9,519,884	\$8,249,909	\$7,354,518
NARS	\$12,387,916	\$11,990,318	\$9,951,056
NYX	\$11,738,524	\$12,858,922	\$12,334,801
TOO FACED	\$11,315,005	\$12,165,196	\$11,873,633
URBAN DECAY	\$7,023,485	\$8,100,766	\$8,929,548

TRENDING OVERALL EARNED MEDIA PERFORMANCE, EMV

Make Up For Ever continued to experience the most dramatic growth from February to March relative to the rest of April's La Mode Top 10. Their 37% growth is owed to the brand's saturation on YouTube and widespread awareness for select products like the HD Foundation. ColourPop's impressive growth between March and April (32%) resulted from two important product launches, their collaboration with the beauty influencer KathleenLights as well as the release of their highlighter collection. Relative to these rising stars, traditional members of The Top 10 experienced far less growth and in some cases saw slight declines in overall EMV. L'Oreal, Maybelline, and NARS shared the most noticeable decline in performance between February and April.



ANALYSIS

BRAND SPOTLIGHT:

COLOURPOP

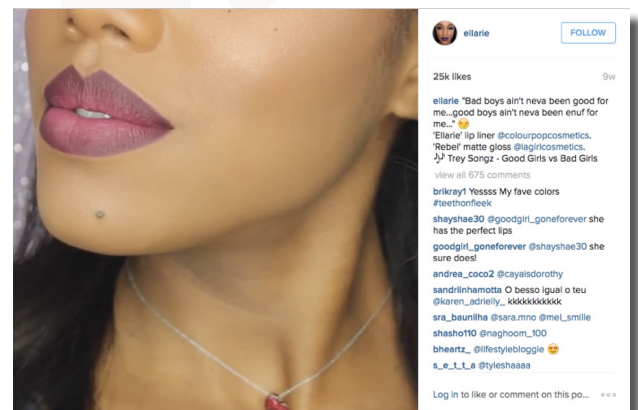
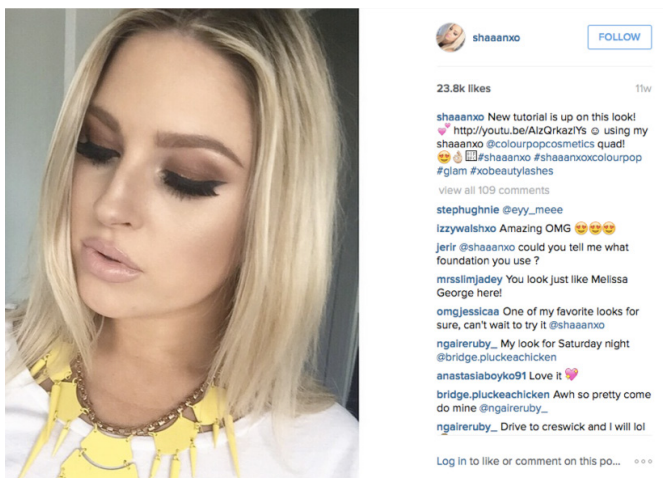
COLOURPOP AND COMMUNITY BUILDING

ColourPop's presence in April's Top 10 is remarkable for a brand that celebrated their one year anniversary this May. The brand's significant growth is owed to their initial and ongoing investment in lasting relationships with both influencers and customers. These relationships are characterized by the brand's thoughtful consideration of the fan's role in brand creation, captured by their unmatched openness to real feedback and celebration of the individual.

THE BLOGGER COLLAB

Within the first five months of the company's existence, ColourPop launched their first blogger "collab," inviting fashion blogger littleblackboots to create her own "lippie stix" color with the brand. By the end of April, the blog had partnered with eight different bloggers to create either lipstick colors or eyeshadow quads. Never random, these partnerships appear to the general public as if they had sprung from genuine friendships.

ColourPop's first partnerships with L.A.-based fashion bloggers nods to their own L.A. origins, telling a consistent story: as if one "cool girl" in L.A. had texted another, "Wanna make a lipstick?" Though their collaborations have shifted to focus specifically on beauty, as opposed to fashion, all of ColourPop's choices are united by the individual's enthusiasm to be a part of the brand's narrative and the creation process of the product. These influencers got to work alongside the brand with product development, and were involved in the product's color selection, manufacturing, naming, packaging, and marketing. The brand allowed these bloggers to pour their heart and soul into their product. Consequently, these women created authentic, moving content rooted in the personal connection felt for both the product and the brand as a whole.



KATHLEENLIGHTS: A CASE STUDY

KathleenLights, the blogger driving the greatest EMV generation in April (around the launch of her eyeshadow quad “Where the Light is”) serves as an exemplar model of ColourPop’s relationship cultivation. In September 2014, the brand posted Kathleen’s review of their eyeshadows on the ColourPop blog, playfully referring to her as “our love.” By November, the brand had rolled out a lippie stix called “Lumiere,” produced in collaboration with the blogger. In an interview with KathleenLights to promote the product, ColourPop earnestly introduced her by admitting that the brand was “fangirling pretty hard right now.” Comments like this humanize the brand, allowing ColourPop to effectively align themselves with the consumer as another one of Kathleen’s followers. ColourPop not only included questions that allowed her to explain her thoughts behind the lipstick’s color, but also delved into her personal life philosophy, her inspirations, and her childhood dreams.

ColourPop’s ongoing commitment to KathleenLights’ involvement in their brand narrative culminated in her April eyeshadow launch. In another blog post announcing the product launch, ColourPop wrote: “You have asked, and asked, and asked, and asked (and of course we’ve been dying to make this happen as well) SO HERE IT IS!” Not only did ColourPop respond to the larger community of their consumers and their desires, they also identified themselves as one of KathleenLights’ many ardent followers, and part of the community waiting anxiously for her to share her next passion-project with them. “Where the Light Is” drove the generation of \$1.3M EMV: \$561K by KathleenLights herself, and \$784K by the community of beauty bloggers supporting her and responding to her work.



In KathleenLights' own video announcing the launch of her product, Kathleen is visibly beside herself with excitement and pride in her work. She has to remind herself at the beginning of the video, "Oh my God, don't start crying. We just started this video. Relax." Kathleen spends the rest of the video providing an in-depth explanation of her inspiration, philosophical belief of the importance of keeping oneself "in the light" of positivity and kindness, and her love for her Yorkie, Cornelius ("the love of my life"), whom she named an eye shadow after. For Kathleen and her followers, this is a deeply personal experience. The name of the product, pulled from the song lyric "Keep me where the light is," is so important to her that she has it tattooed on her foot, which she tries to show in the video frame, complete with some contortion and endearing, funny facial expressions. This deeply emotional experience for her is inextricable from the real relationship she has with the brand. Despite her best efforts, Kathleen ends the video in tears, repeatedly thanking ColourPop, her community of followers and fellow bloggers.

Kathleen Lights x ColourPop

Posted on November 26, 2014

We know, we know, the news of our collab with YouTube Beauty Guru Kathleen Lights has been leaked and many of you (and not gonna lie all of us at ColourPop HQ) are fan-girling pretty hard right now.



We introduce to you: *Lumière*

The shade created by Kathleen Lights herself! Dying to know more about the creation and inspiration behind this shade? Check out her interview below!



THE BRAND AS BEST FRIEND

ColourPop has built an incredibly coherent brand identity, so much so that across all of their social media platforms and website, their voice comes across as a dead ringer for any girl's best friend. Their choice of language in their "About Me" section, FAQs, and blog posts, as well as in each product name and description, embodies a young, hip, L.A.-based girl: sharp, smart, and cultured, but easy to connect with and endearing. She is cool, but doesn't make her friends feel any less cool. Their mission statement is clear, and constantly reinforced: "We think that the whole barrier between fancy and affordable is absolute nonsense. That's why all of our products have luxury formulas at prices that won't break the bank." The brand's philosophical stance towards makeup "by the people, for the people" translates into a truly democratic and relatable shopping experience.

This kind of transparency successfully positions the brand as a friend that the consumer can trust, with a variety of interests and opportunities for personal connections. In their website's FAQs section, the brand volunteers that their choice of breakfast is a "Kale and Sunshine smoothie." ColourPop's addition of the hashtag "#thatcalilifestyle" shows that the brand is aware of the image they are projecting, and can poke fun at themselves about it. In addition to their breakfast preferences, ColourPop also shares their contingency plan for when Earth is destroyed (they would flee to the Ewok planet, of the Star Wars franchise). Furthermore, the majority of ColourPop's product names, such as Bae, Pegacorn (Taylor Swift's Halloween costume), and So Quiche (a reference to a spinoff from an Australian mockumentary), are grounded in the pop culture zeitgeist, temporally relevant, and feel "in the know." Ranging from colloquial to "in the know," ColourPop product names remain exclusive enough so that consumers who understand a reference feel "cool," but not so exclusive that they alienate consumers who aren't "in the know."

On ColourPop's website, every product that has an accompanying swatch detail is displayed against three different skin tones. When the brand selected bloggers to review highlighters that were launched in April, they chose women of color covering a range of skin tones. The brand manages to keep the brand open and inclusive, while making each blogger, and thereby consumer, feel unique and catered to. ColourPop succeeds in the same way that a real, one-of-a-kind friend can be seen as cool and genuine at the same time. They don't need to protect their "cool" by excluding, though their "coolness" does not diminish the more inclusive they become. Everything about these product collaborations expressly addresses the individual, and is meaningfully reflective of the participating blogger's personality and philosophies.

TRIBE DYNAMICS

TRIBEDYNAMICS.COM

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