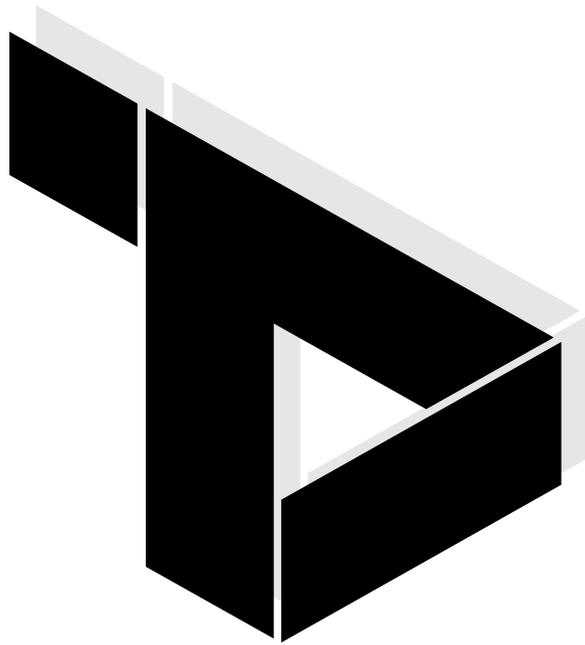


LA MODE OCTOBER

OCTOBER 2015 COSMETICS EDITION



ANALYSIS BY
CHRISTINA GOSWILLER, MERISSA REN, & GRACE CHAO

EMV

Earned Media Value

EMV is 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.

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

Earned Media Value Leaderboard

Top 10 Brands

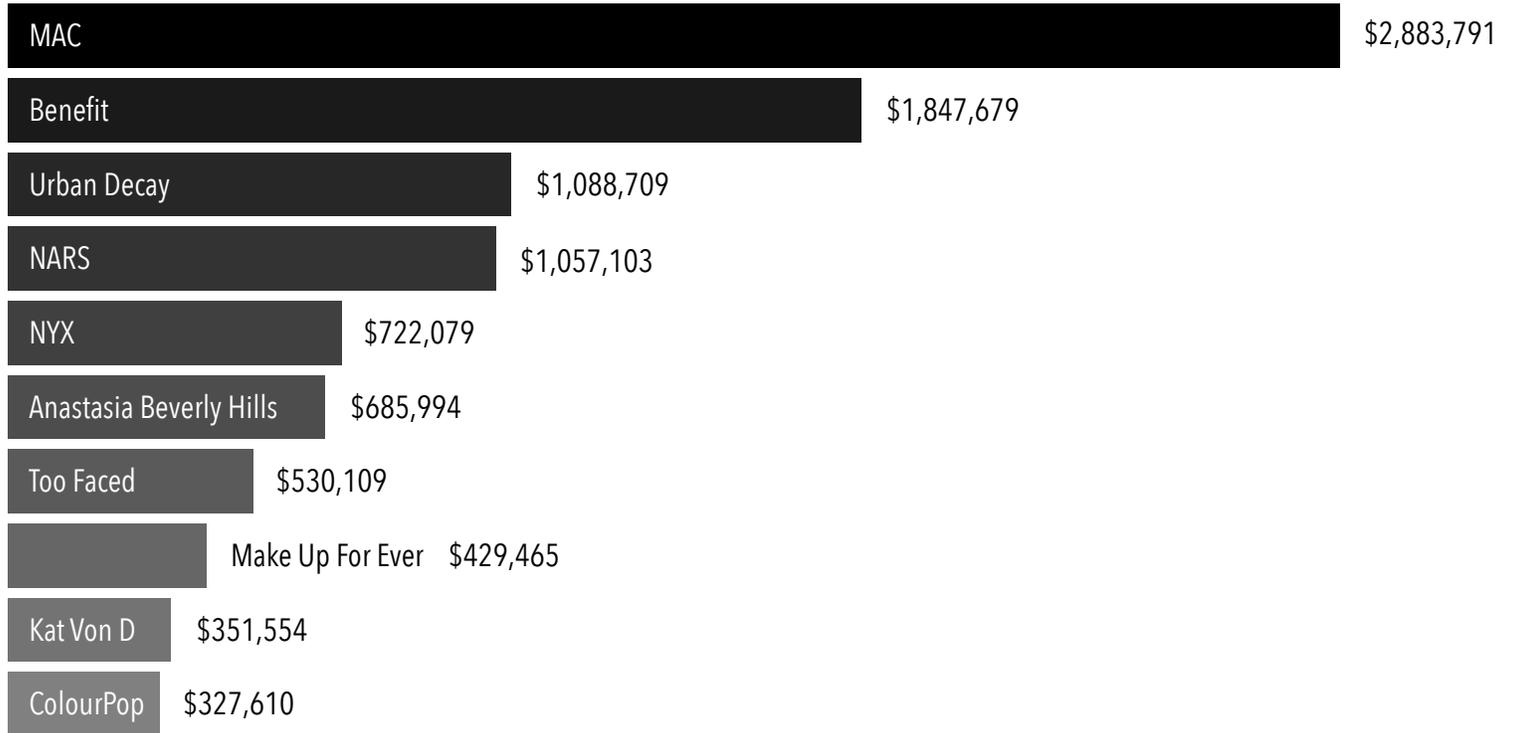
A horizontal bar chart displaying the top 10 brands. Each brand name is on the left, and its corresponding value is on the right. The bars are dark gray and decrease in length from top to bottom.

Anastasia Beverly Hills	\$63,432,894
MAC	\$45,357,774
NYX	\$32,831,767
Too Faced	\$28,283,077
Urban Decay	\$26,973,210
Benefit	\$20,971,475
Make Up For Ever	\$18,651,013
ColourPop	\$17,772,655
NARS	\$17,025,998
Kat Von D	\$16,673,559

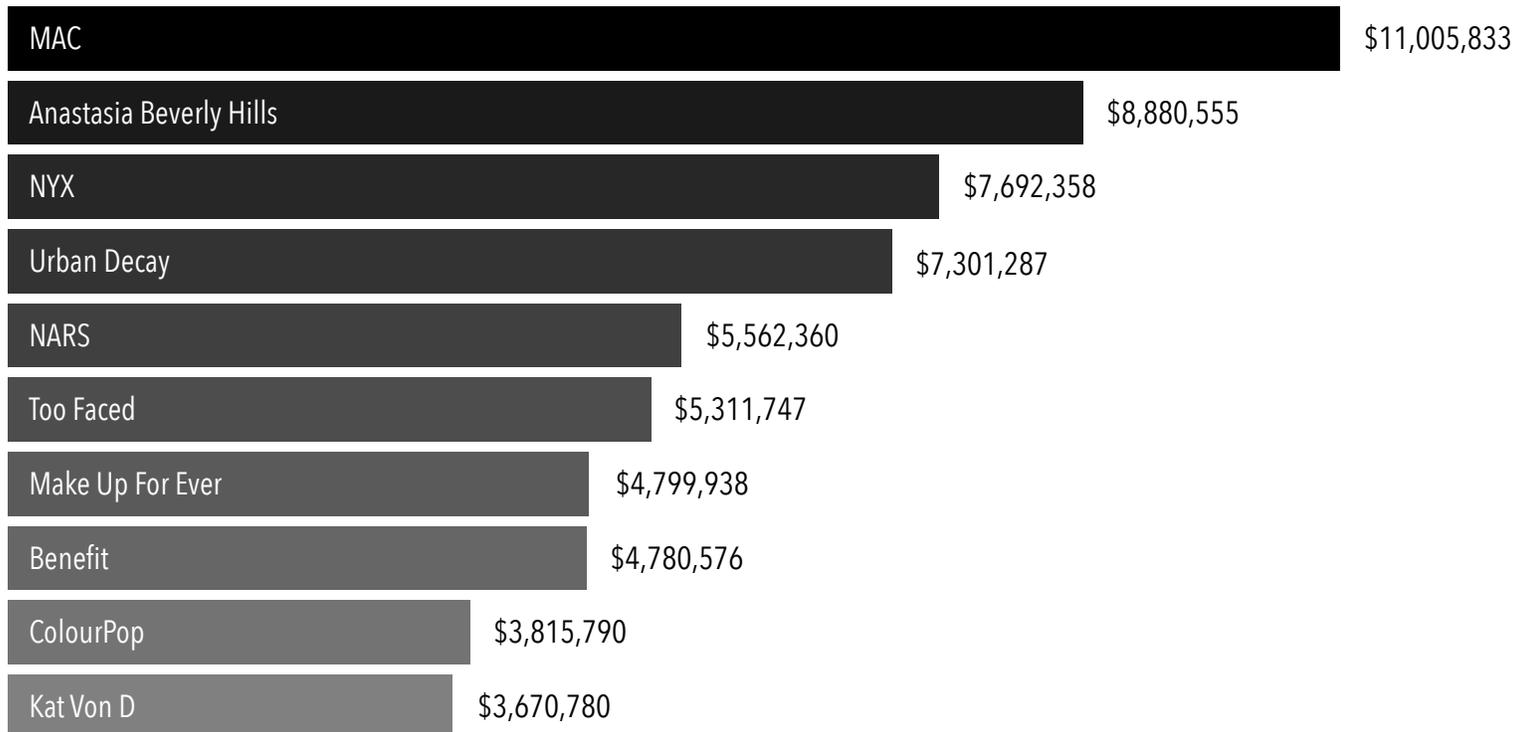
THE TOP 10

Earned
Media
Performance
By Channel

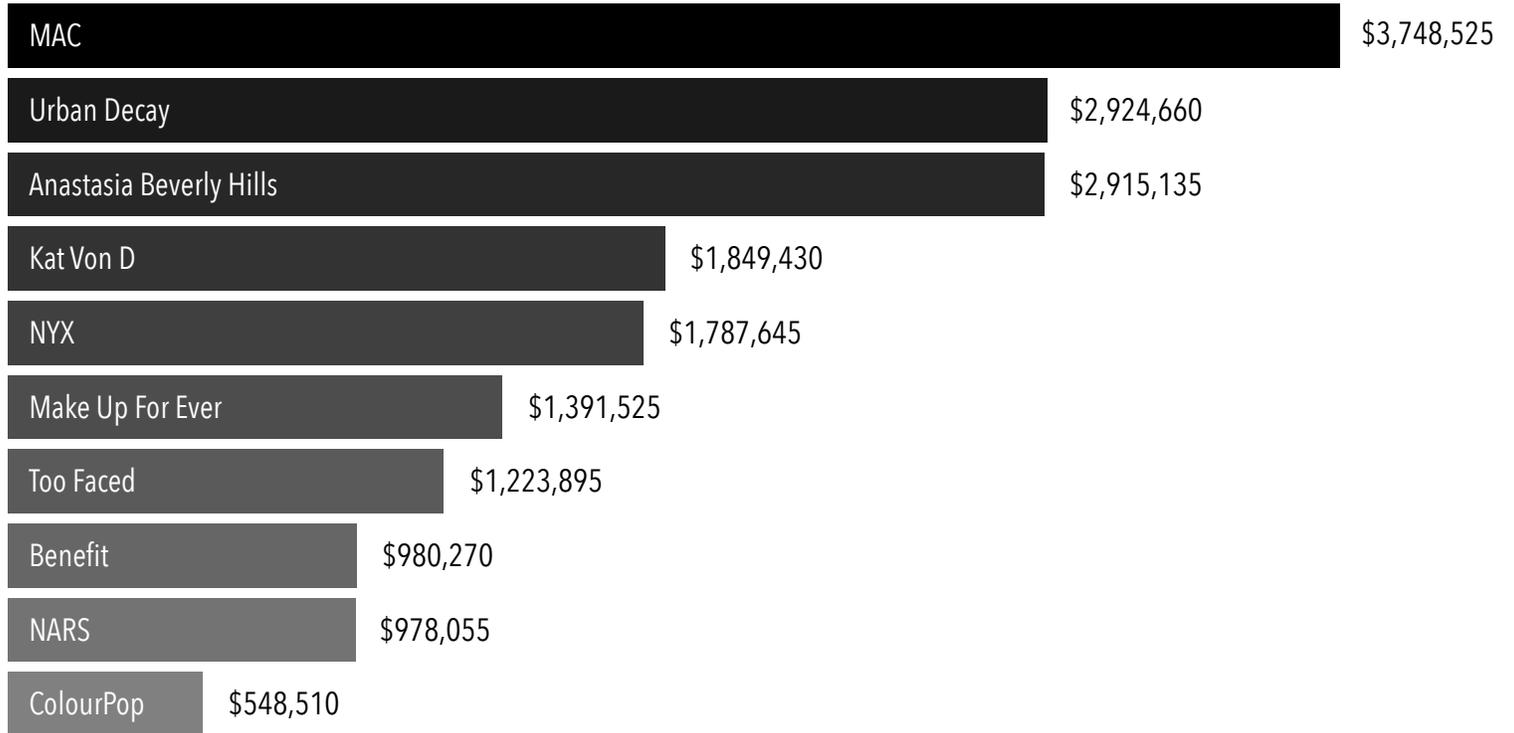
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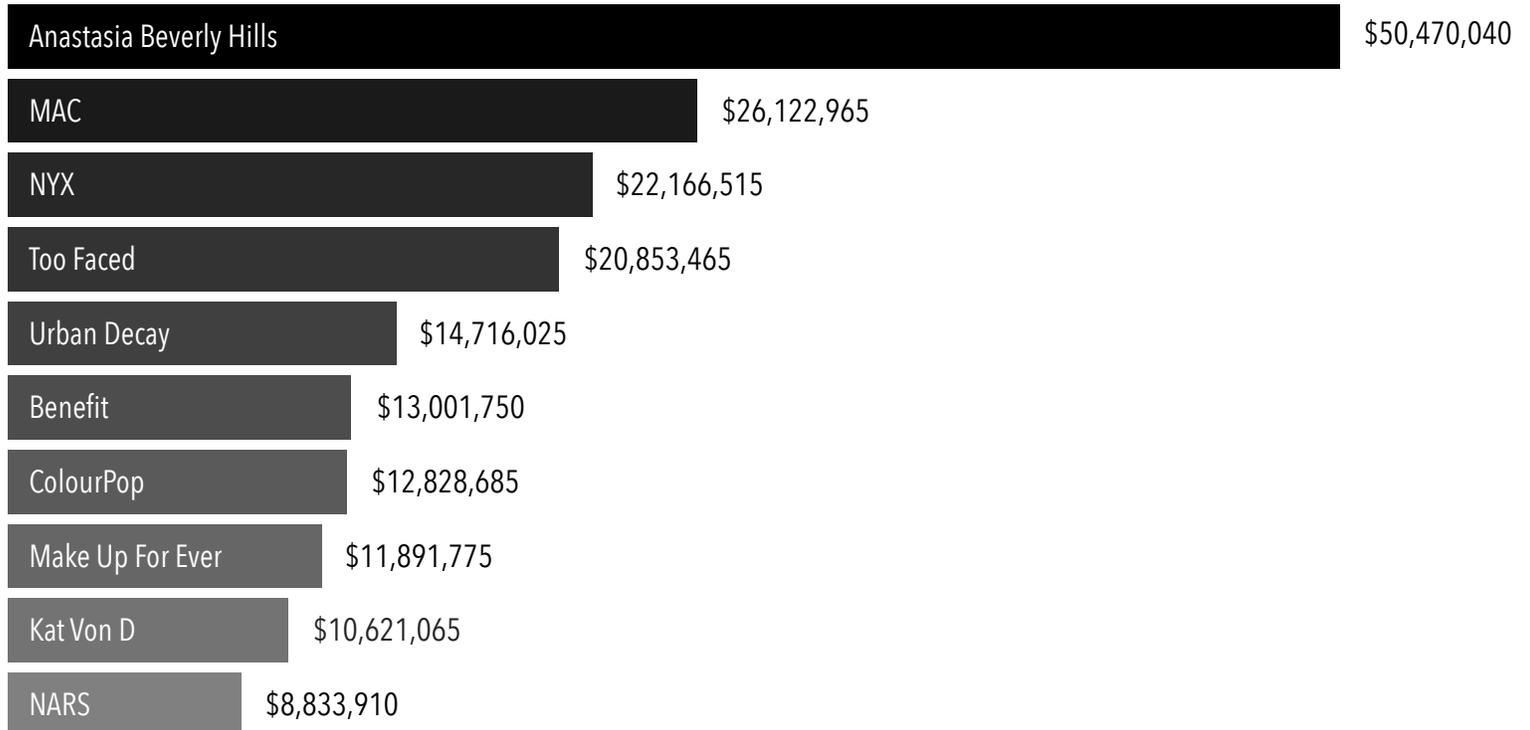
YOUTUBE



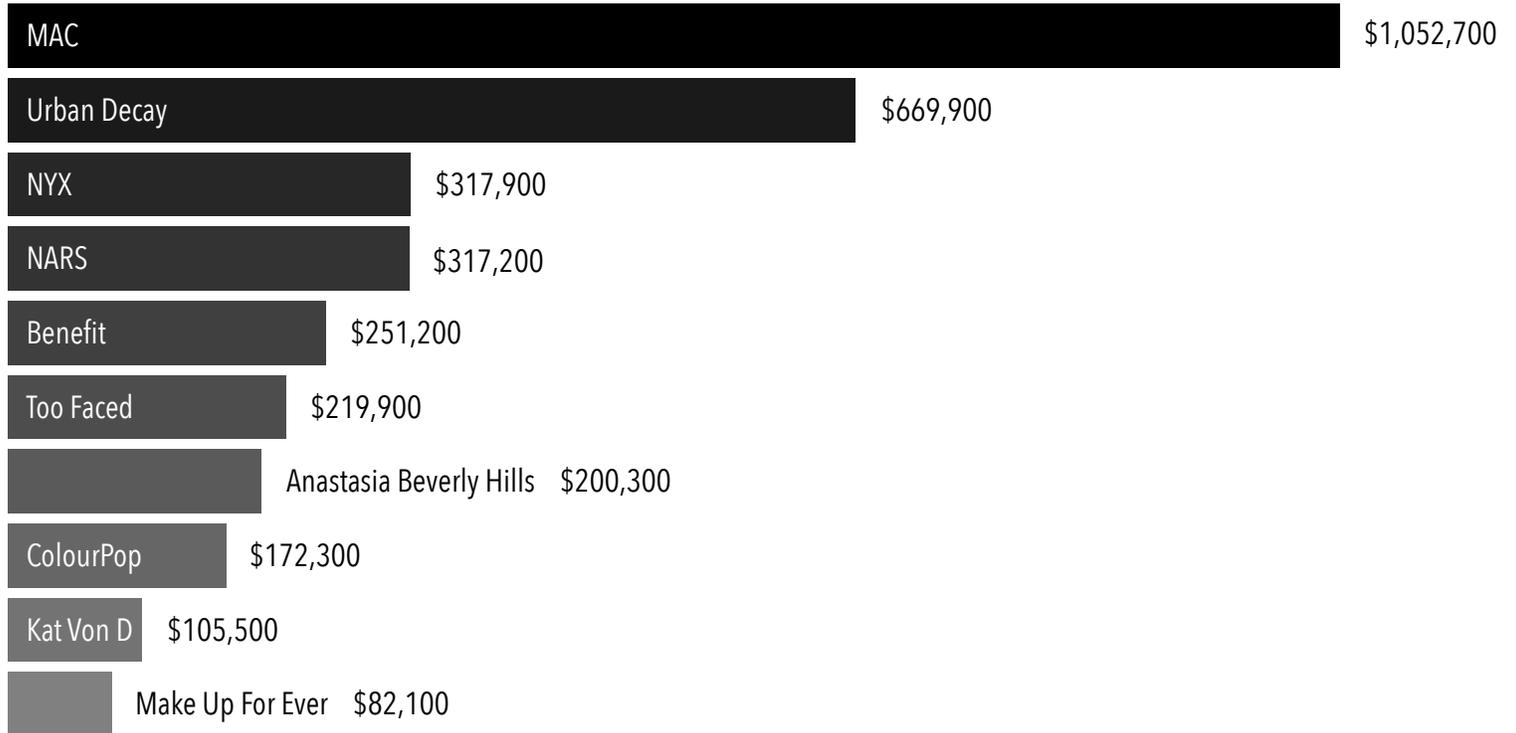
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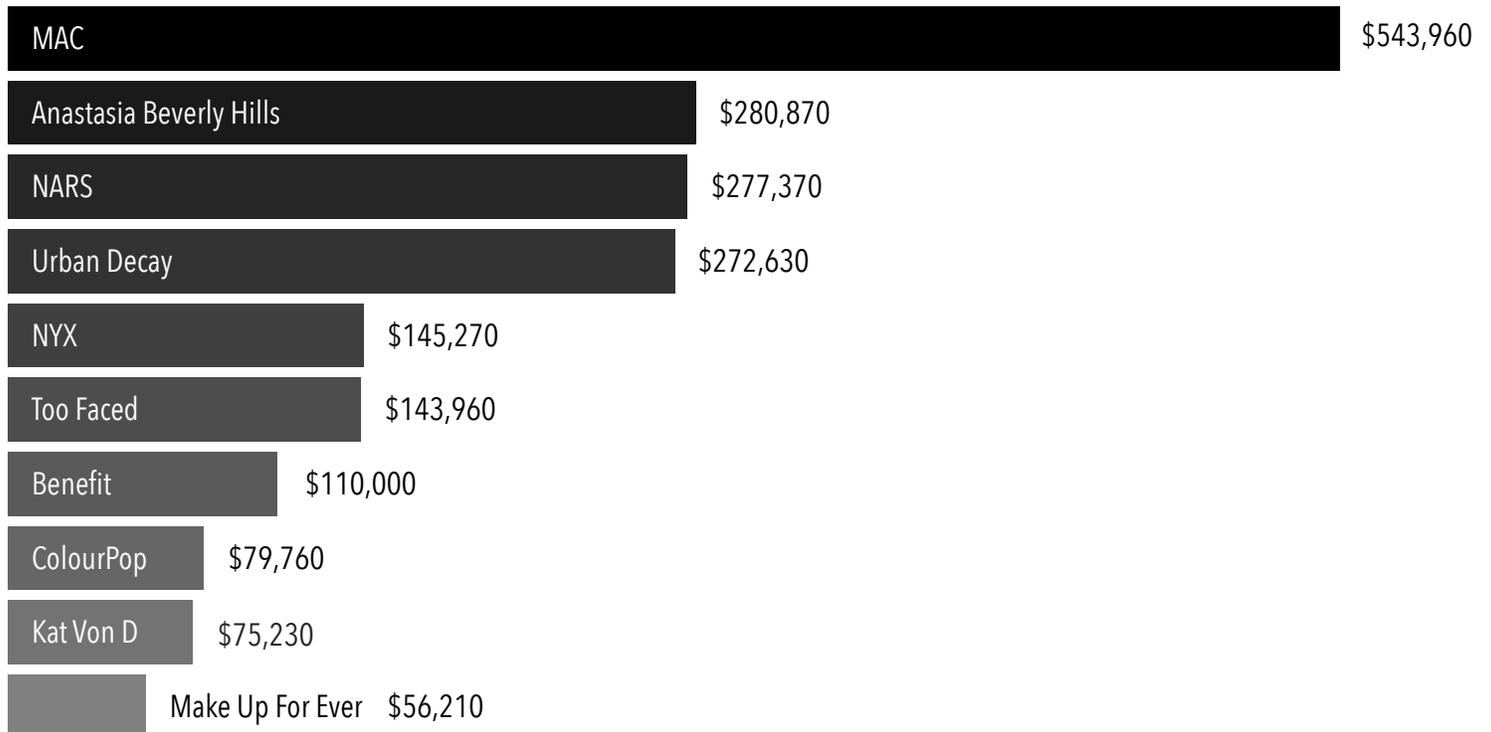
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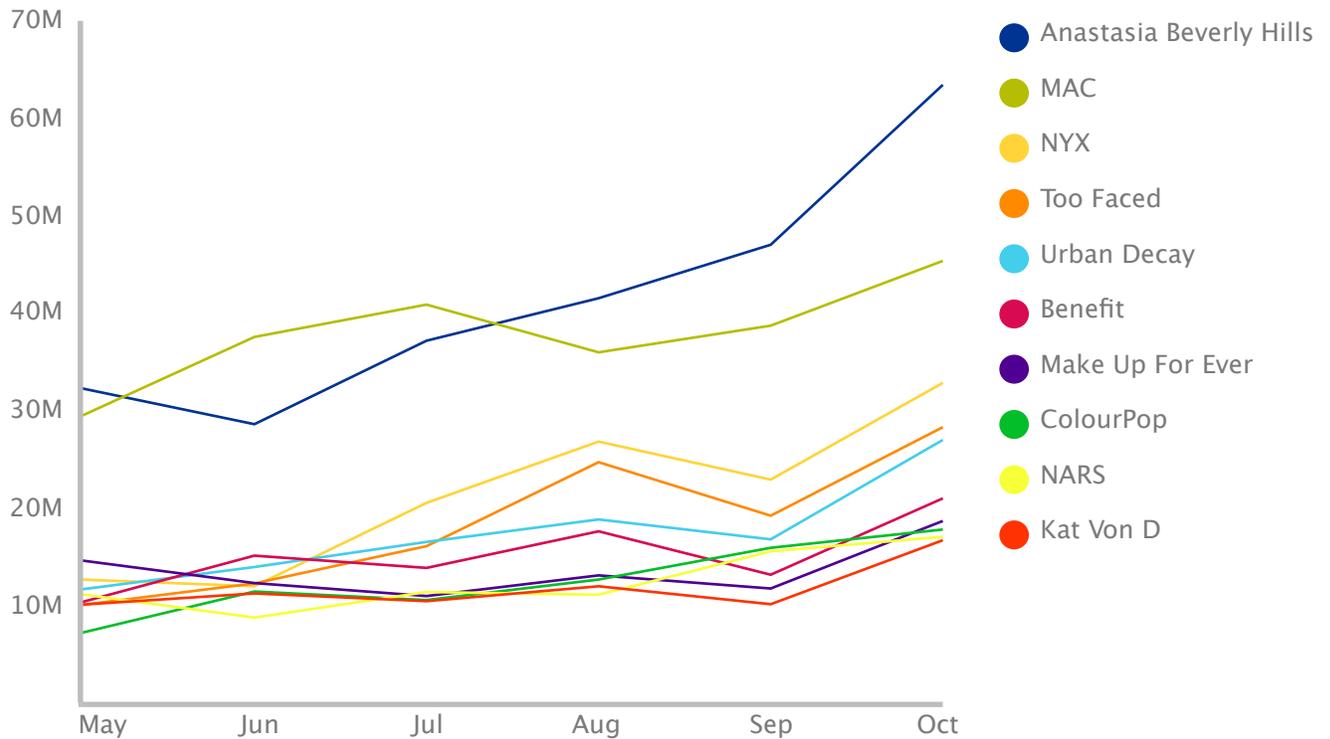
TWITTER



PINTEREST



OVERALL TRENDING EMV



OVERALL GROWTH

BRAND	MAY-JUL	AUG-OCT	TOTAL MAY-OCT	3MO/3MO GROWTH
Anastasia Beverly Hills	\$98,010,849	\$151,972,662	\$249,983,511	55.06%
MAC	\$107,889,210	\$120,034,295	\$227,923,505	11.26%
NYX	\$45,090,932	\$82,532,778	\$127,623,710	83.04%
Too Faced	\$38,339,880	\$72,165,175	\$110,505,055	88.22%
Urban Decay	\$42,059,564	\$62,546,107	\$104,605,671	48.71%
Benefit	\$39,254,144	\$51,693,595	\$90,947,739	31.69%
Make Up For Ever	\$37,801,331	\$43,431,088	\$81,232,419	14.89%
ColourPop	\$29,117,126	\$46,304,195	\$75,421,321	59.03%
NARS	\$31,198,535	\$43,635,140	\$74,833,674	39.86%
Kat Von D	\$31,689,159	\$38,723,106	\$70,412,266	22.20%

Introduction: Fall Makeup Gets Creative

October saw an influx of compelling, Halloween-inspired content creation from beauty influencers across all tiers. Top-tier influencers like Jaclyn Hill and Mykie of Glam&Gore battled it out for the best Halloween transformation, showcasing their makeup prowess by creating looks on par with professional Hollywood makeup artists. The ensuing spikes in both content creation and engagement, triggered by the distinctly theatrical style of Halloween-related earned media, emphasizes the power and centrality of storytelling in influencer marketing.

In addition to holiday-themed content, creativity largely remains a focus of the most socially successful brands when inspiring fans through owned marketing initiatives. One of the most effective strategies for harnessing creativity is with exclusive in-person events. By providing opportunities for influencers to flex their creative muscles -- through branded events, online call-to-actions, and integrated campaigns -- brands benefit from the personal and intimate connections felt by the content creator herself. Co-creation, or creative interaction among multiple influencers, unites fans around both the notion of artistry and their support for fellow beauty enthusiasts. With the brand serving as agent for the creation and sharing of content, the result is an organic alignment of brand narrative with the shared values and interests of its community. This simultaneously strengthens the brand's identity and the connection that influencers and followers feel towards its value propositions.

Anastasia Beverly Hills Balances Aspirational and Accessible Branding

Very few brands can boast a following as dedicated as the fans of digital darling Anastasia Beverly Hills.



Mykie of Glam&Gore celebrates with founder, Anastasia Soare at the brand's annual Halloween party, netting 351 retweets.

The brand proved once again that to be a follower of ABH is a life-defining decision that exists beyond a traditional brand-consumer relationship. In October, the brand hosted its extravagant annual Halloween party that was attended by beauty influencers, brand executives, and Hollywood celebrities. Influencers posted Instagram photos from the event that captured the essence of what makes the ABH brand -- and its parties -- so unique: an authentic interest in its community. Strategy aside, ABH's earned media characterized the influencers in attendance as genuine friends of the brand, as opposed to part of a promotional engagement meant to push the marketing motives of the brand. Influencers, brand executives, and celebrity guests all enjoyed the party as equals, brought together by a personal connection to founder Anastasia Soare herself.

The intimate event, hosted at the Carondelet House (an Italian villa in LA's Koreatown), was adorned with over-the-top branded decor, including an ABH logo-shaped ice sculpture as well as a bar covered with edible treats. In classic ABH style, the event incorporated a number of content creation resources: a photography station, complete with a green screen, enabled bloggers to take

high-quality photographs to share with their followers. The evening was filled with music and dancing, and attendees left the event with a large goodie bag of ABH products and Halloween desserts like candy apples.

Influencers who attended the ABH party varied in fame and follower count, from Mykie of Glam&Glore (830K followers on Instagram) to WhatWouldLizzyDo (269.6K subscribers on YouTube). Regardless of size or reputation, bloggers expressed their excitement to meet Anastasia Soare, who appeared in extravagant Halloween costume and makeup. On YouTube, WhatWouldLizzyDo dedicated a 15-minute video to her experience, filming everything from her costume and makeup planning, to the contents of her goodie bag, to an impromptu tutorial using those new makeup products. In the last five minutes of her video, WhatWouldLizzyDo showcases the individual ABH products one by one and provides commentary on each item. Some were products that the brand had already sent her (which could be used for giveaways), while others featured new shades that the blogger had been waiting to try.

From a strategy perspective, the event was successful for several reasons. The party itself created an incentive for influencers to go all out with their costumes, which made for compelling and visually stimulating content. Because it brought together influencers based



on a shared love for beauty and enthusiasm for the ABH brand, the event also served as a networking opportunity for these women to get to know one another and exchange contact information for possible future collaborations. Though the bloggers all shared roughly the same event experience, each walked away feeling that they had been singled out as individuals, thereby strengthening their personal connection to the brand.

iluvsarahii poses with a fellow influencer at the party, garnering 24.3K likes.

A Focus on Quality Defines Benefit Online

Despite its noteworthy product packaging and flamboyant brand personality, Benefit's brand awareness seems to be driven primarily by an awareness for specific hero products.

These products were a combination of both old and new releases across multiple product categories. In particular, the brand's Hoola matte bronzer, Rockateur blush, and Girl Meets Pearl highlighter appeared to be favorites amongst influencers and accepted as one of the best options within each of their categories. French blogger EnjoyPhoenix, who has partnered with leaders like Urban Decay in the past, consistently used both the Rockateur blush and Boi-ing concealer in multiple high-engagement videos. Though Benefit's slogan, "laughter is the best cosmetic," was still reflected in this content, product quality seemed to be the primary association that influencers made with the brand, even before its distinctive personality.



EnjoyPhoenix, uses Benefit's Boi-ing highlighter in a routine product empties video, earning 660.4K views, 20.9K likes.

ColourPop's Strategic #SquadGoals

ColourPop continues its rapid growth in online awareness, thanks to its dedication to creating a tightly-knit community of advocates.



Dulcecandy proudly shows off her outfit before having dinner with ColourPop, netting 22.3K likes.

In addition to KathleenLights, who debuted the brand's new Cream Gel Liners and Colors, the brand has invested in the careers of more influencers, expanding its family via collaborations with itsmyrayeraye (October 2015) and jamiemakeupgreenberg (May 2015). In its characteristically playful tone, ColourPop promoted these new collabs with the popular #squad hashtag and #ColourPopSquadGoals to demonstrate its closeness to these women. In all owned posts, the brand also stressed the agency that influencers maintained during the creative development phase, giving each woman due credit for "her collection."

The power of these collaborations for ColourPop is the perceived minimal barrier to entry for influencers interested in partnering with the brand. Too Faced and Becca Cosmetics suggest that in order to get close to their brand, the influencer must have the industry prowess and social fame of a Vegas_Nay or Jaclyn Hill. By contrast, ColourPop's collaborations appear, at least ostensibly, rooted in genuine friendship and investment in more relatable women or relatable everyday moments. In an #OOTD Instagram, Dulcecandy casually mentioned that she couldn't wait to have dinner with ColourPop.

ColourPop focused on building a family with its October Night Swim pool party, represented online by influencers with #nightswimxcolourpop. Unlike ABH's Halloween party, ColourPop's event hosted at the glamorous Hollywood Roosevelt Hotel, did not celebrate a specific holiday or occasion. Instead, ColourPop -- with the rebellious "LA" attitude characteristic of its brand -- acknowledged that the motivation behind the party was simply, "because we can."

The Night Swim party also differed from the ABH party with respect to the tier of influencers invited. Known ColourPop enthusiasts like emilysears, feralcreature (who collaborated with the brand on a Lippie shade in the past), and phibhibb all attended and came across as close friends, based on the love and camaraderie captured in their posts. Most attendees, however, had followings of just a few thousand fans each. The individual posts inspired by the party failed to garner impressive engagement rates, but there's no doubt that ColourPop's investment in these up-and-coming influencers will pay off as they accumulate more followers through their relationship with the brand.



Emilysears flaunts goodies from the brand at the #nightswimxcolourpop, with 21.1K likes.

Urban Decay Rocks On-Brand Collaboration

Following the success of its NAKED Skin products -- the NAKED Skin concealer was mentioned as often as the the NAKED palettes in high-engagement videos -- Urban Decay hosted an event in LA to celebrate the release of its first-ever celebrity designer collaboration with pop music phenom Gwen Stefani.

The brand invited top influencers, including Lauren Curtis, Vegas_Nay, chrisspy, iluvsarahii, desimakeup, and christendominique, who shared their experiences on Instagram and Snapchat.

From a branding perspective, the partnership appears to be a perfect fit, with Stefani flawlessly capturing the brand's rocker-chic aesthetic and "beauty with an edge" persona. According to the brand, Stefani was directly involved in the actual design of the palette, helping brand experts choose the 15 featured shades. The popstar proudly shared her own announcement of the palette's release with her Instagram community before the product hit the shelves in late November.

The LA launch event sparked content creation on Facebook in particular, where attendees shared photos of themselves at the event and with Stefani herself. Lauren Curtis posted on her Facebook how "grateful" she felt for being invited, captioning a photo of herself and Stefani with, "Seriously the luckiest gal in the world." Curtis was also excited by the opportunity the event created for her to meet her peers by bringing together fellow beauty influencers.

In classic Urban Decay style, influencers at the event had the chance to pose in front of an Urban Decay logo-adorned backdrop -- the brand's version of the red carpet -- beside Stefani, whom a majority of these women referred to as their idol. Urban Decay's Gwen Stefani partnership and ensuing launch event largely reinforced its edgy brand identity and forged a sense of community based on a shared attachment to this identity.



Lauren Curtis poses alongside Gwen Stefani at the Urban Decay event in LA, garnering 35.9K likes

"Also got to meet so many incredible YouTubers and bloggers that I've been following for so long but have never met before! Such a cool day #udxgwen"

-Lauren Curtis