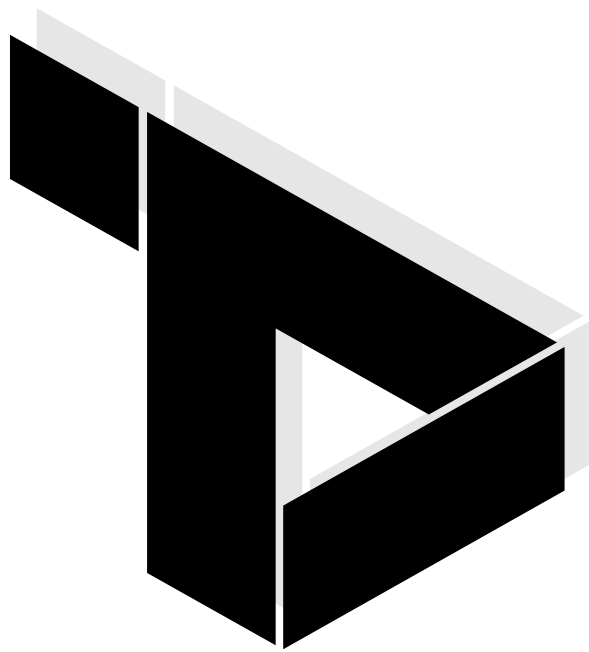


LA MODE NOVEMBER

SKINCARE EDITION 2015



ANALYSIS BY
CHRISTINA GOSWILLER, MERISSA REN, GRACE CHAO & ALEXA CRANDALL

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.

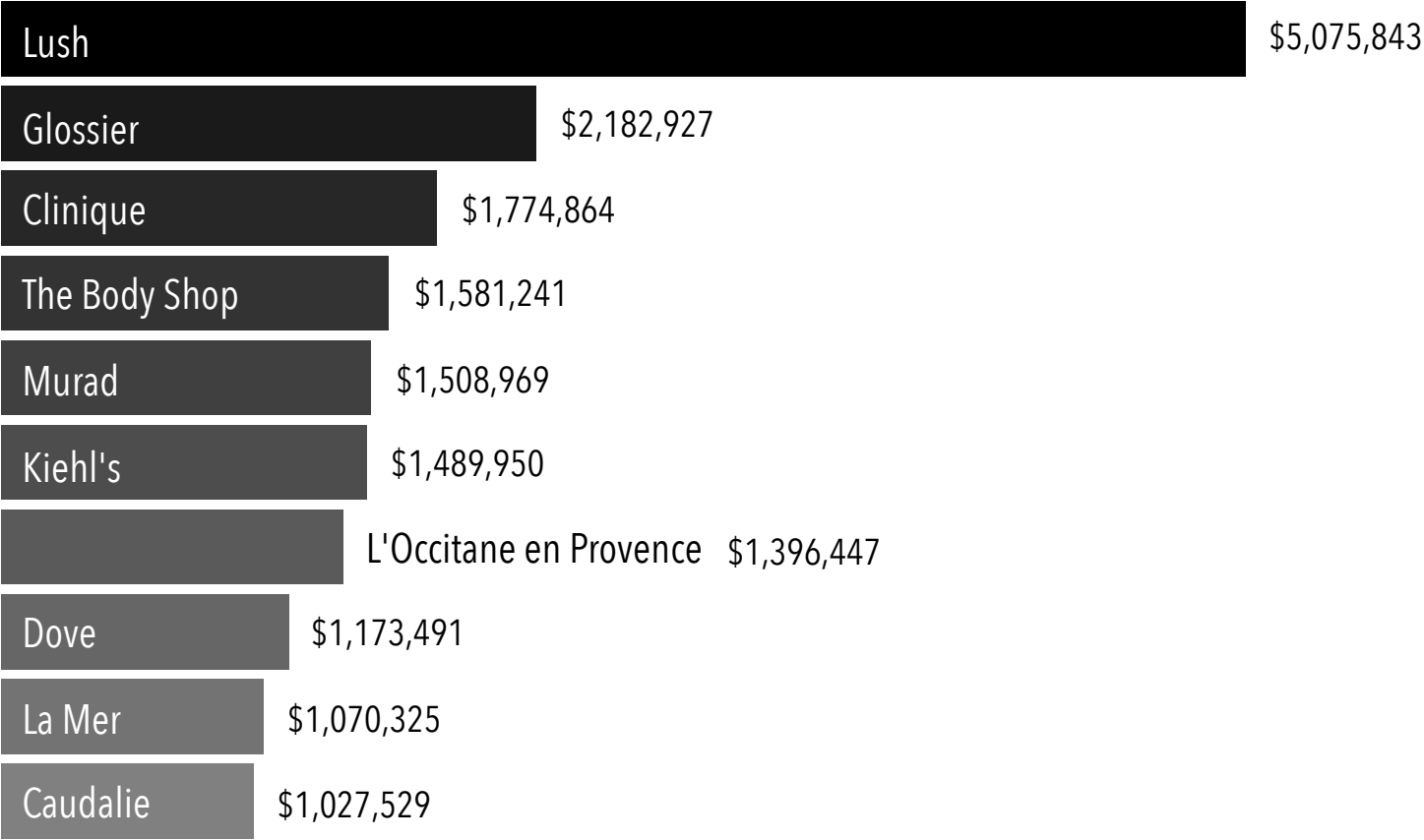
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THE TOP 10

Earned Media Value Leaderboard

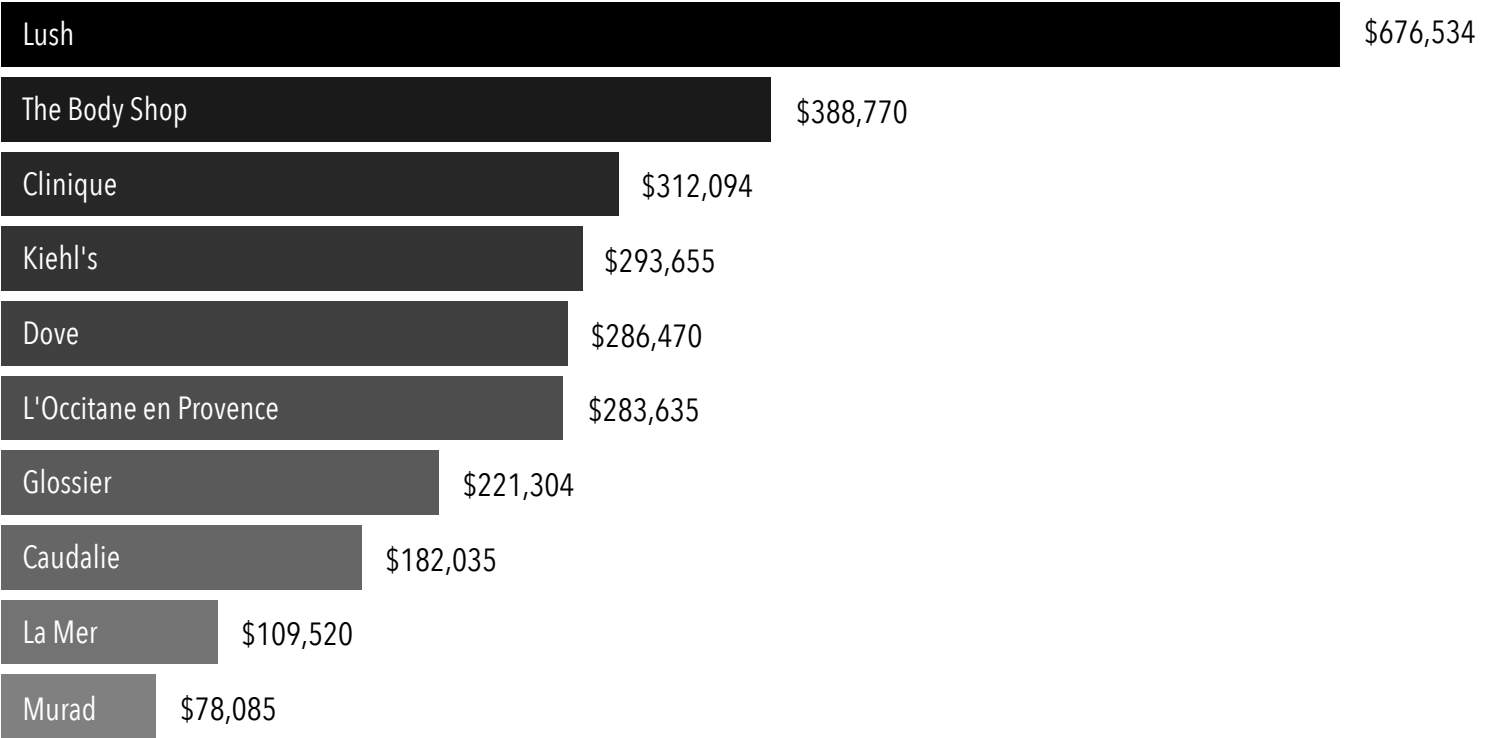
Top 10 Brands



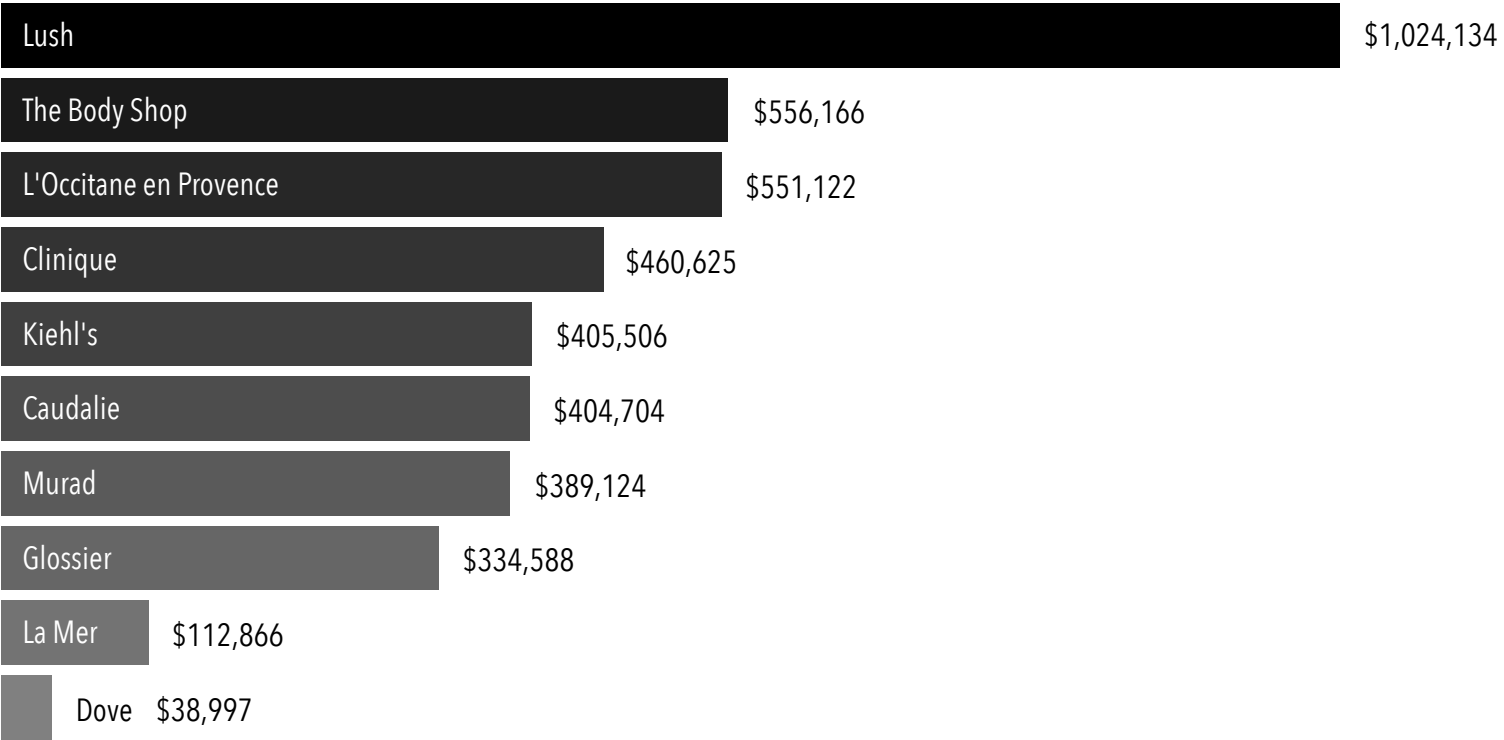
THE TOP 10

Earned Media Performance By Channel

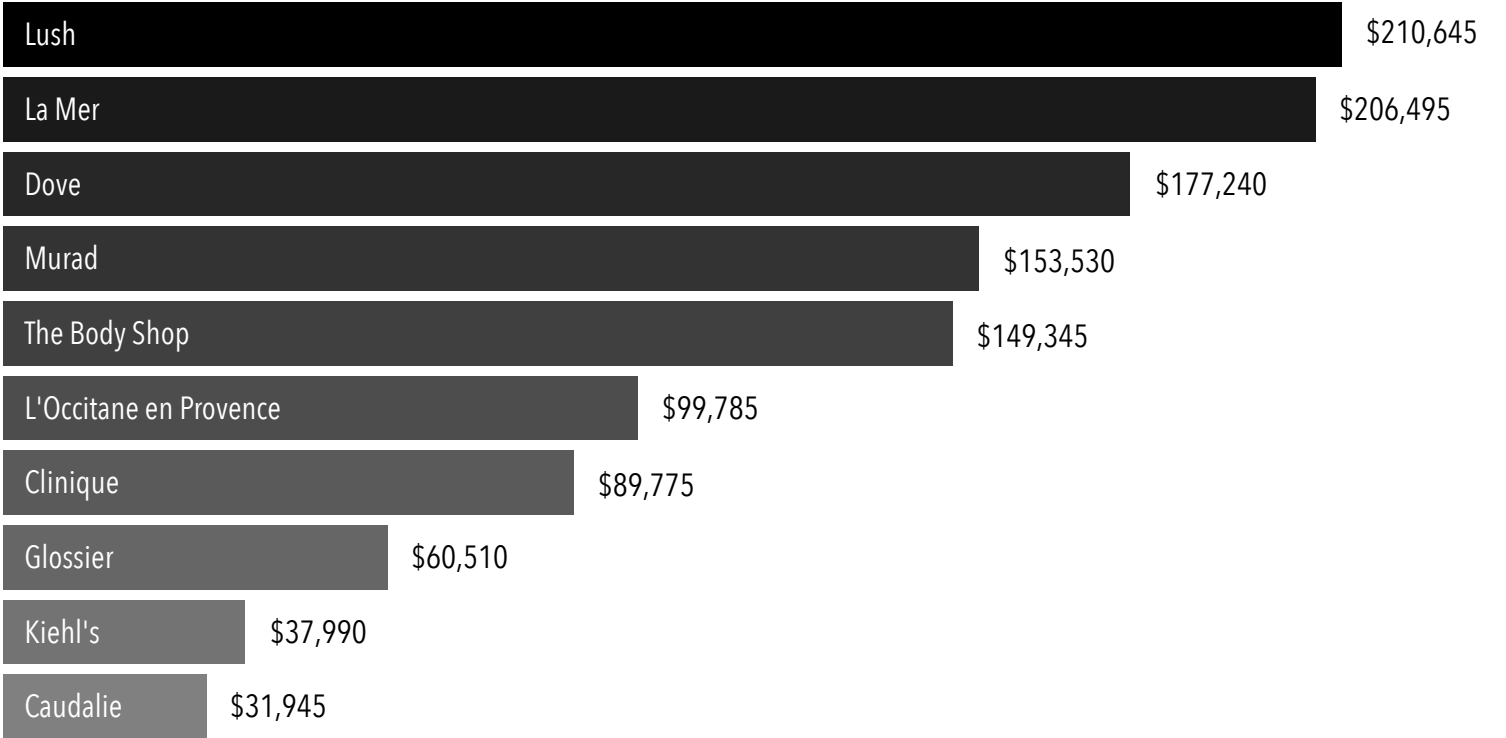
BLOG



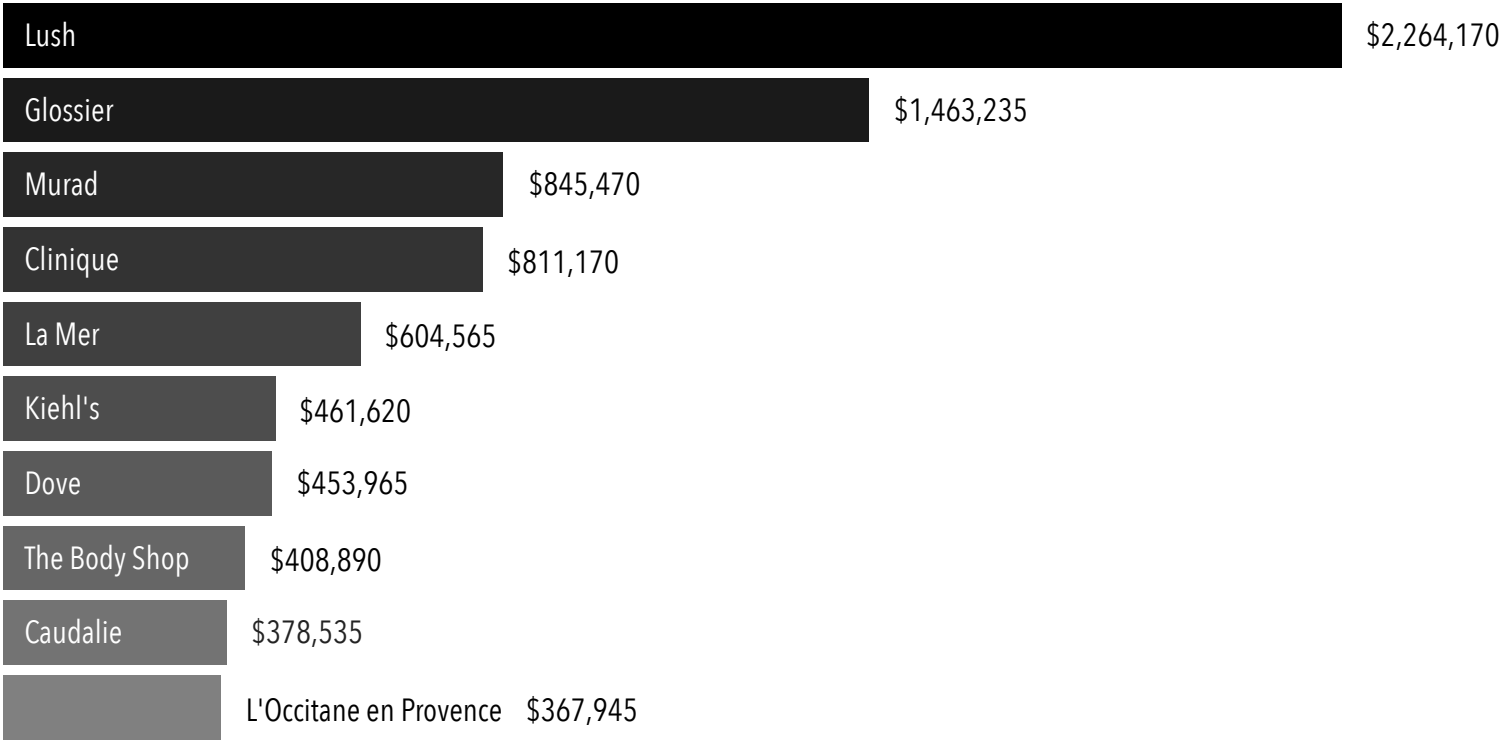
YOUTUBE



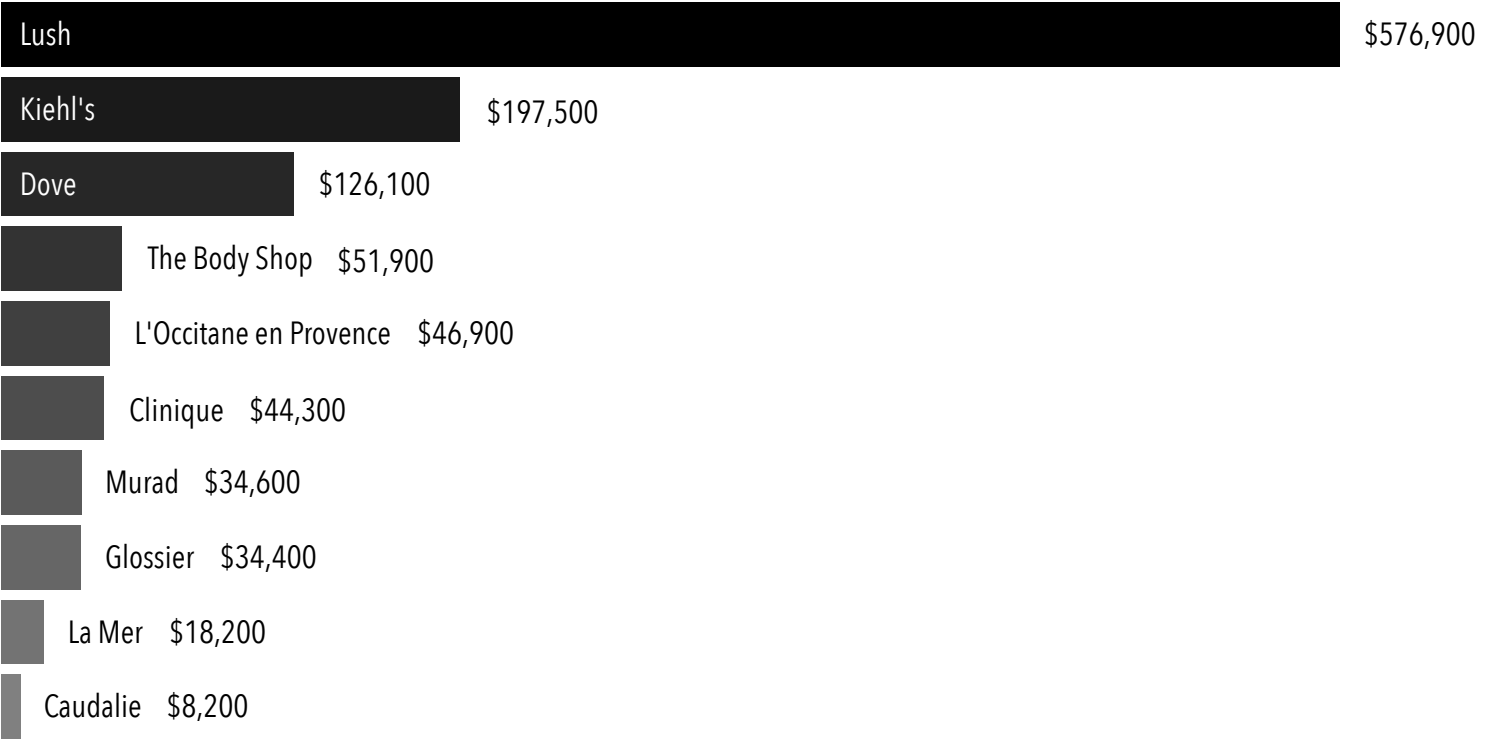
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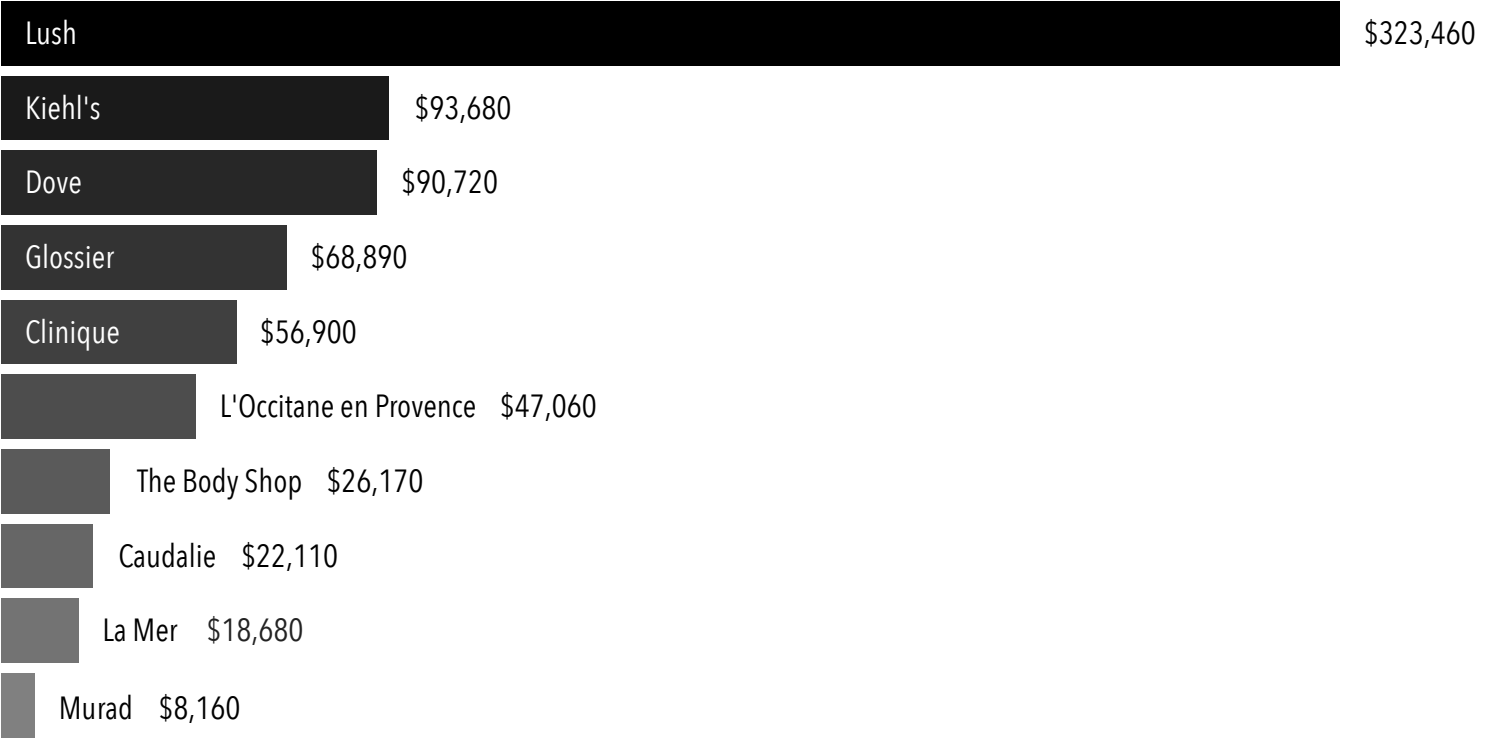
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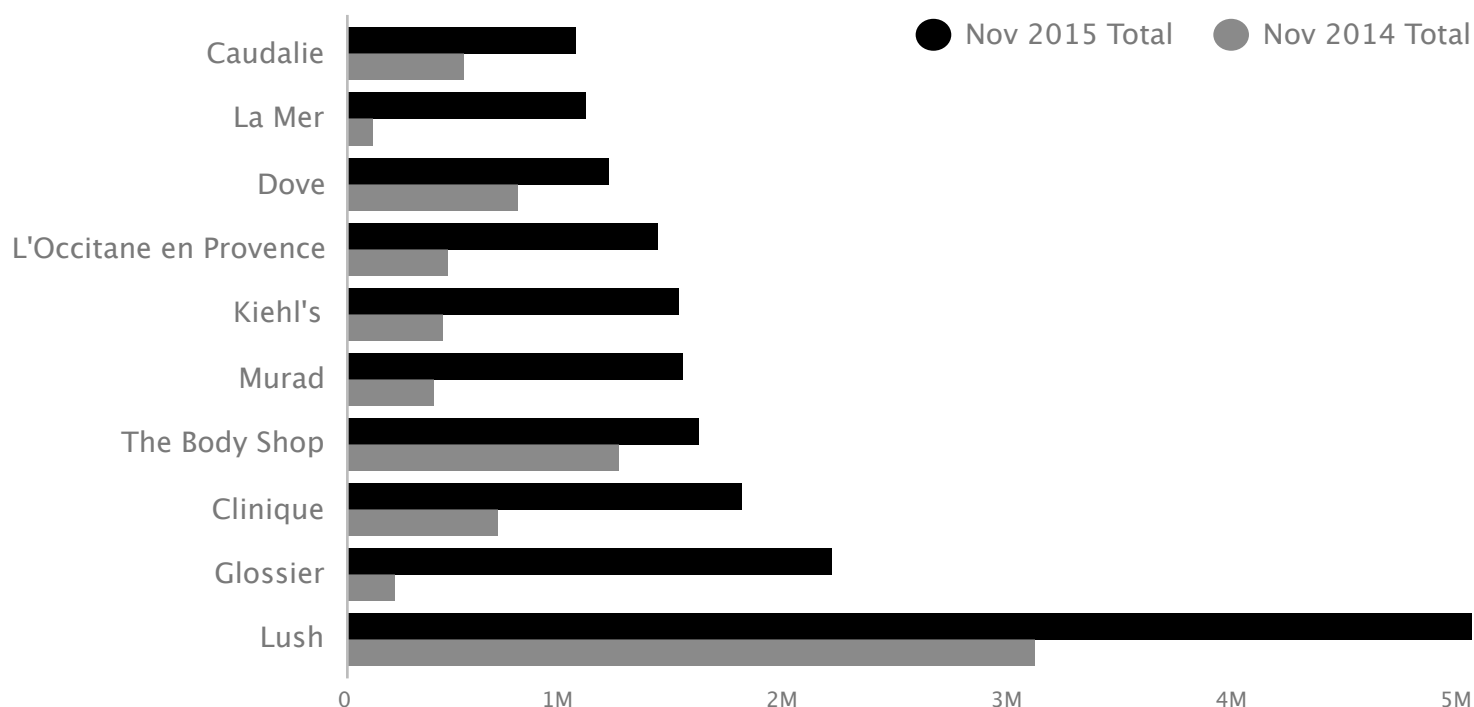
TWITTER



PINTEREST



OVERALL TRENDING EMV



Y/Y GROWTH

BRAND	NOV 2015	NOV 2014	Y/Y GROWTH
Lush	\$5,075,843	\$3,099,966	163.74%
Glossier	\$2,182,927	\$207,345	1052.80%
Clinique	\$1,774,864	\$671,784	264.20%
The Body Shop	\$1,581,241	\$1,218,847	129.73%
Murad	\$1,508,969	\$385,977	390.95%
Kiehl's	\$1,489,950	\$423,289	351.99%
L'Occitane en Provence	\$1,396,447	\$448,906	311.08%
Dove	\$1,173,491	\$763,307	153.74%
La Mer	\$1,070,325	\$110,730	966.61%
Caudalie	\$1,027,529	\$518,792	198.06%

Glossier

GIFTS BRAND EXPERIENCES



Glossier demonstrates thoughtful branding with its well-designed Mask Duo Set.

Just in time for the holidays, Glossier released its Mask Duo Set, consisting of 12 single-use pods of the brand's Mega Greens Galaxy Pack and Moisturizing Moon Mask. The pods were artfully placed in a pink box branded with "Glossier" in gold script, exuding the same luxury appeal as a box of fine chocolates. To raise awareness for the launch, the founder and CEO of Glossier and Into the Gloss, Emily Weiss, published a video clip of the unwrapping of the Mask Duo Set to her personal Instagram account. Though the set was marketed as the perfect gift for the holidays, it earned about \$109.5K EMV in November alone.

Lush

OBSESSED INFLUENCERS DRIVE EMV

Zoella continues to act as one of the brand's most influential advocates, frequently featuring Lush products both in her highly anticipated monthly favorites videos and on Instagram. In December, the influencer published a photo of the Magic of Christmas Bubble Bar, captioning it, "My favourite Christmas present from Lush this year. Smells so good!" The post received a remarkable 459K likes. Lush benefited from comparable engagement on YouTube as well, where Zoella easily attracts 1M to 2M views per video. In her "October Favourites" video, Zoella enthusiastically recounts her first experience using Lush's Christingle body conditioner. She begins her analysis of the product by admitting to have never used a body conditioner before but concludes that the Lush product is "brilliant." She recognizes her fans as individuals when she adds, "I love it, I think you'll love it."

Gravzyardgirl dedicated an entire haul video to Lush products, released just in time for the holidays. She tells fans that the products in her haul are not all for her, but were purchased as gifts for each member of her family (all Lush fans), proof of her authentic love for the brand's products. The first product that the



Zoella shows off a holiday-themed bath product gifted by Lush, earning 459K likes.



influencer shows off is, in fact, the Magic of Christmas Bubble Bar, for which she “waits every year...to come out.” For each product, the vlogger launches into a colorful description of the way the product feels, smells, and appears when it is used in the shower or bath. Throughout the entire video, grav3yardgirl’s quirky enthusiasm provides the perfect tone and backdrop for the Lush brand.

Nicole Guerriero showed her appreciation for Lush products in her November “At Home Pamper Routine” video. In an eight-minute video, the influencer walks viewers through the many stages of her therapeutic routine, beginning with

a bubble bath and finishing with a facial. Though there is little to no commentary, Nicole’s authenticity is maintained by the intimate nature of the video and her visible enjoyment of treating herself with a variety of skincare and bath products. In one shot, Nicole holds a Lush Bubble Bar under the faucet of her jacuzzi-size bathtub, so the viewer can witness firsthand the explosion of color as the bar dissolves, bringing to life the vibrant Instagrams that capture only the colorful aftermath. The influencer also features the Don’t Look at Me mask, which she applies in front of her mirror so viewers can see the fun, bright teal color of the mask, characteristic of Lush’s brand.

Grav3yardgirl highlights her favorite Lush products to give and get in a holiday haul video, garnering 430.2K views and 18.4K likes.

Murad

APPEALS TO MAKEUP COMMUNITY

Iluvsarahii created substantial content for Murad, featuring the brand's Essential C Day Moisturizer as the foundational base for the majority of her looks. Murad was one of the few skincare-focused brands to be tagged in the influencer's many posts, alongside top-performing cosmetics brands such as Anastasia Beverly Hills, Tarte, and Too Faced.

This positive reinforcement among beauty bloggers is reflected in the brand's monumental growth in the past year (a 391% increase), thanks to its commitment to an inclusive influencer program. As proof of Murad's growing awareness among prominent makeup influencers and professional artists, Saleha Abbasi (a professional makeup artist with 3.3M likes on her personal brand Facebook page) was visibly excited to receive and try out a collection of Murad products. On Facebook, she told her followers that she is "super picky" about her skincare routine but had heard amazing reviews of Murad and was willing to give them a chance. She added, "I'm already loving the Advanced Radiance Serum for



brightening and the Hydro-Dynamic Ultimate Moisture Cream! I'll let you guys know my thoughts on everything after I use them for a week!" Her fans responded by asking for her recommendations for Murad products based on their individual skin type. Abbasi's post garnered an impressive 8.5K likes and 151 shares.

Iluvsarahii is a devoted Murad user, tagging the brand in Instagrams that average 30K to 35K likes each.