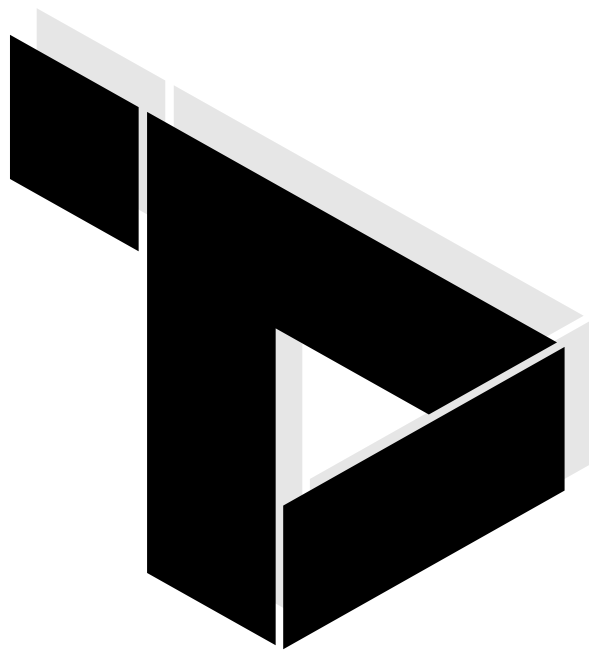


# LA MODE

JANUARY

COSMETICS EDITION 2016



ANALYSIS BY  
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# EMV

## Earned Media Value

Earned Media Value (EMV) is Tribe Dynamics' prescribed metric that quantifies the estimated value of publicity gained through digital earned media and its respective engagement levels. Our holistic approach assigns a specific dollar value to each piece of content, based on the publishing channel's perceived value of digital word-of-mouth to brands within the industry. EMV serves as a tool for benchmarking across marketing activities and across brands.

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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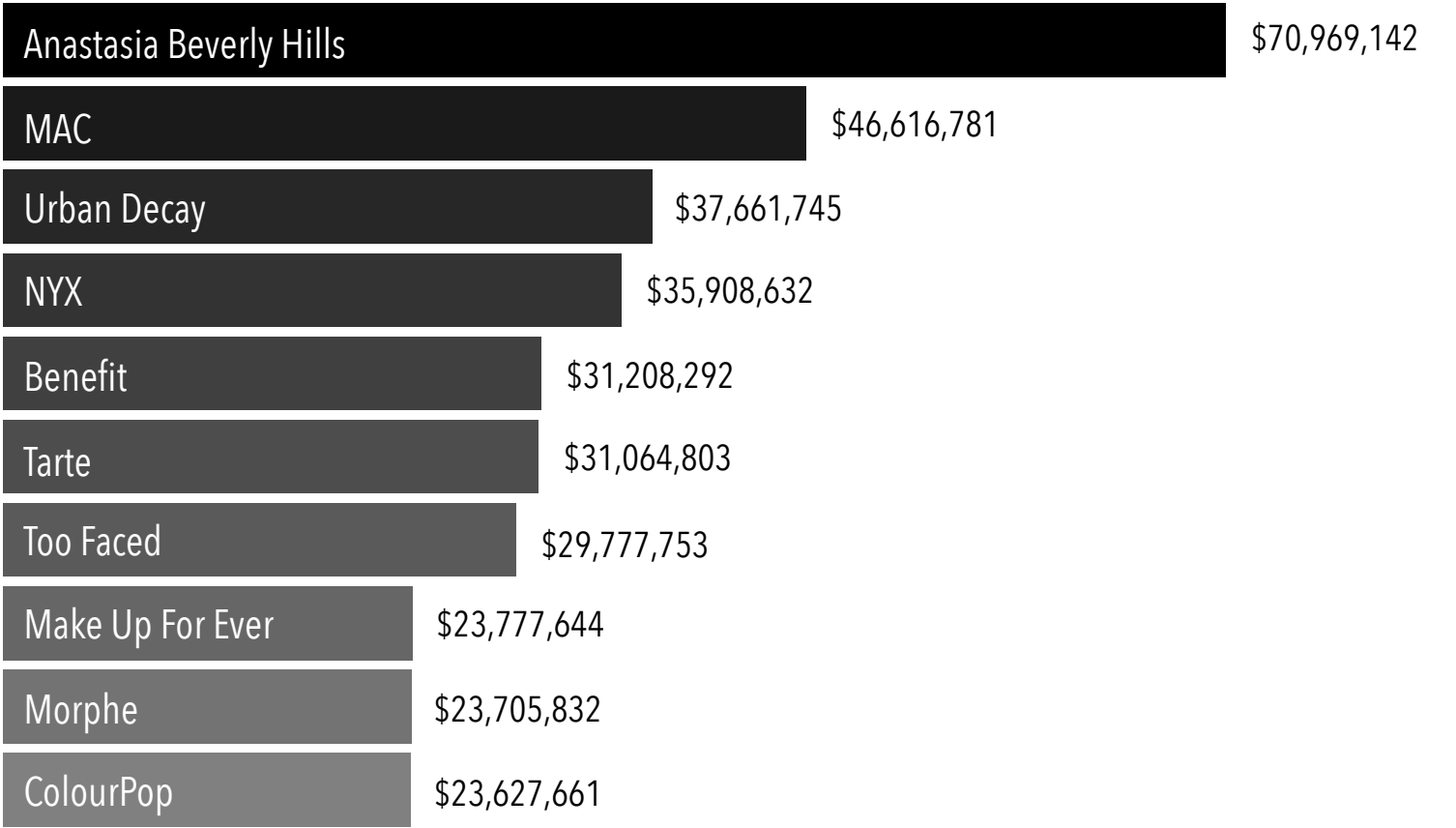
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## THE TOP 10

# Earned Media Value Leaderboard

# Top 10 Brands

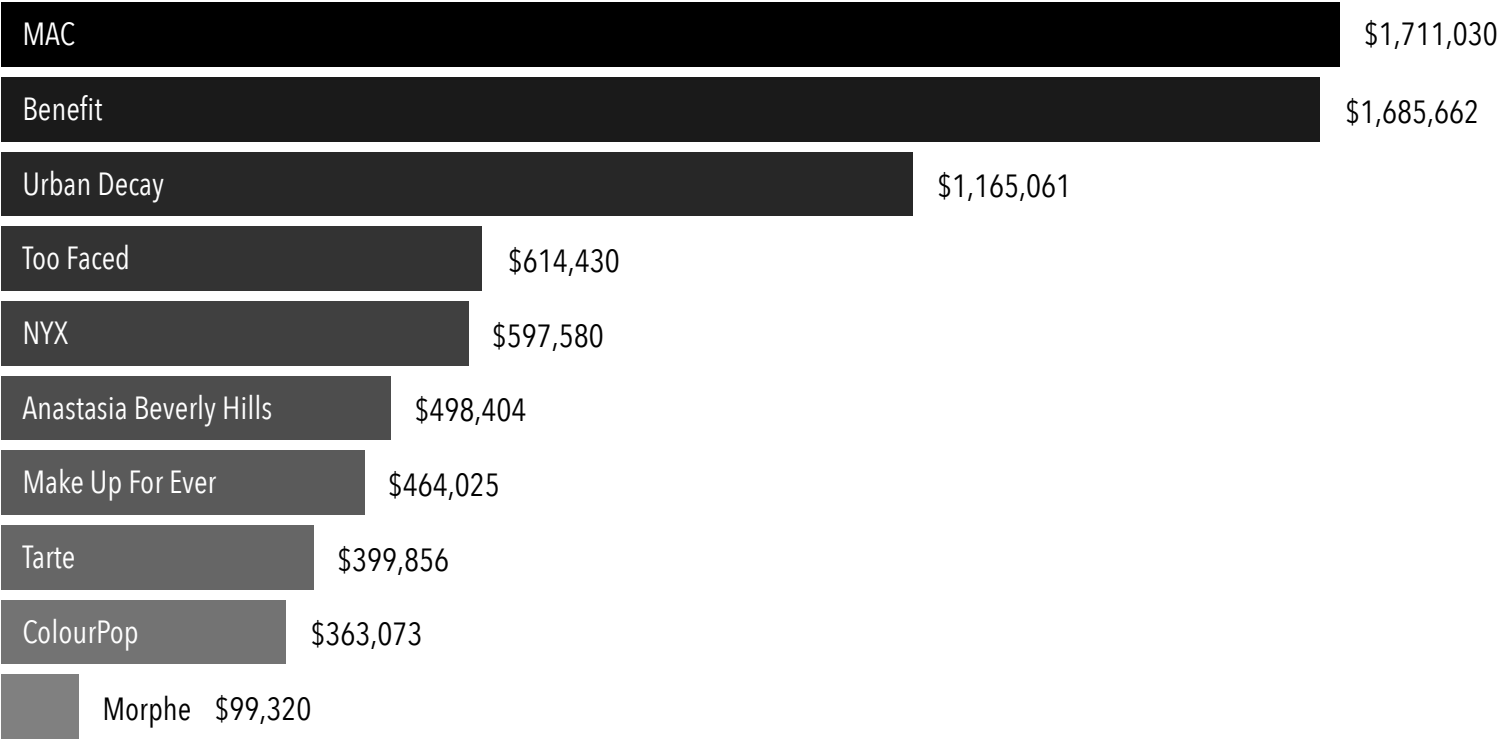


Note: Data reflecting EMV performance from 2016 is calculated using updated methodology. All values related to specific products, campaigns, and posts, as well as promotional and sponsored breakouts, from both 2015 and 2016, are calculated using this updated methodology.

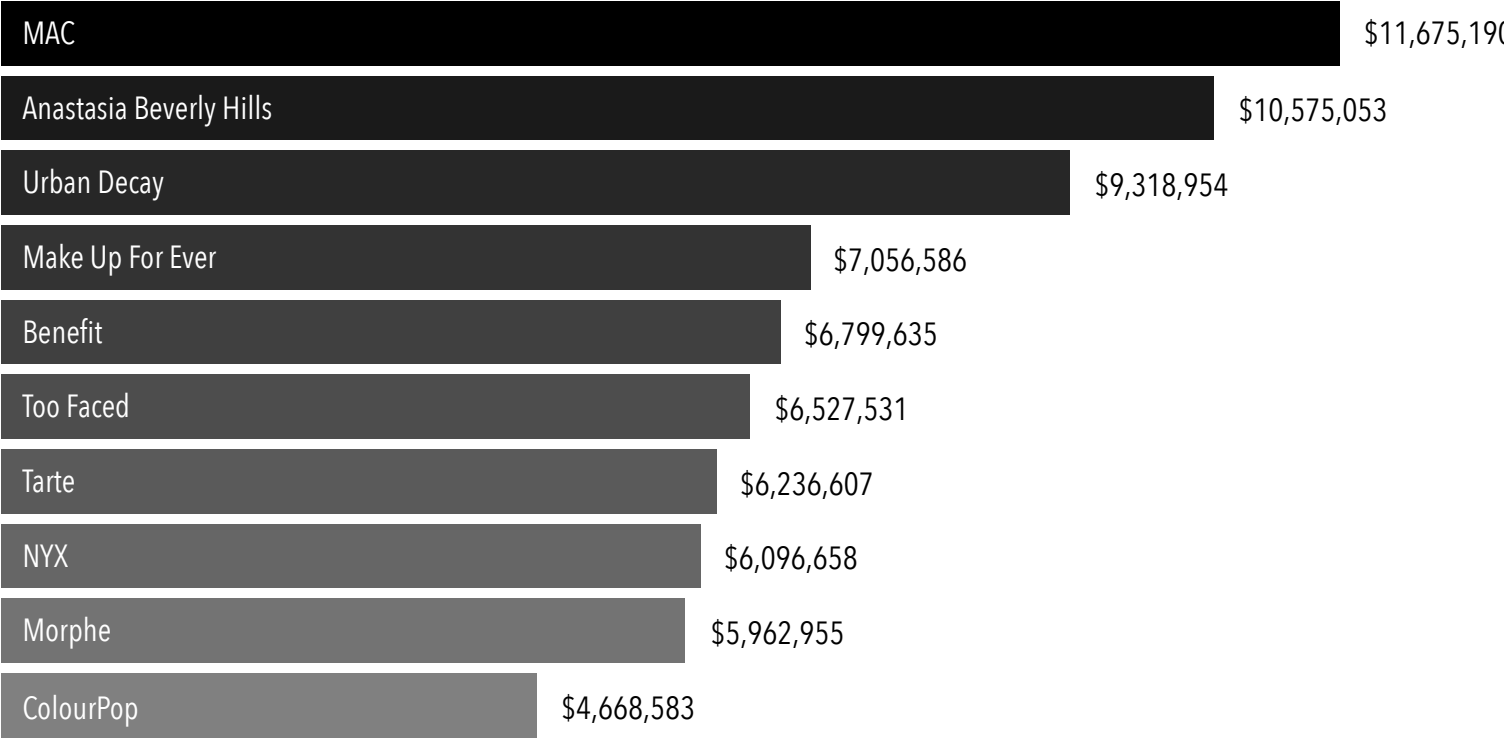
## THE TOP 10

# Earned Media Performance By Channel

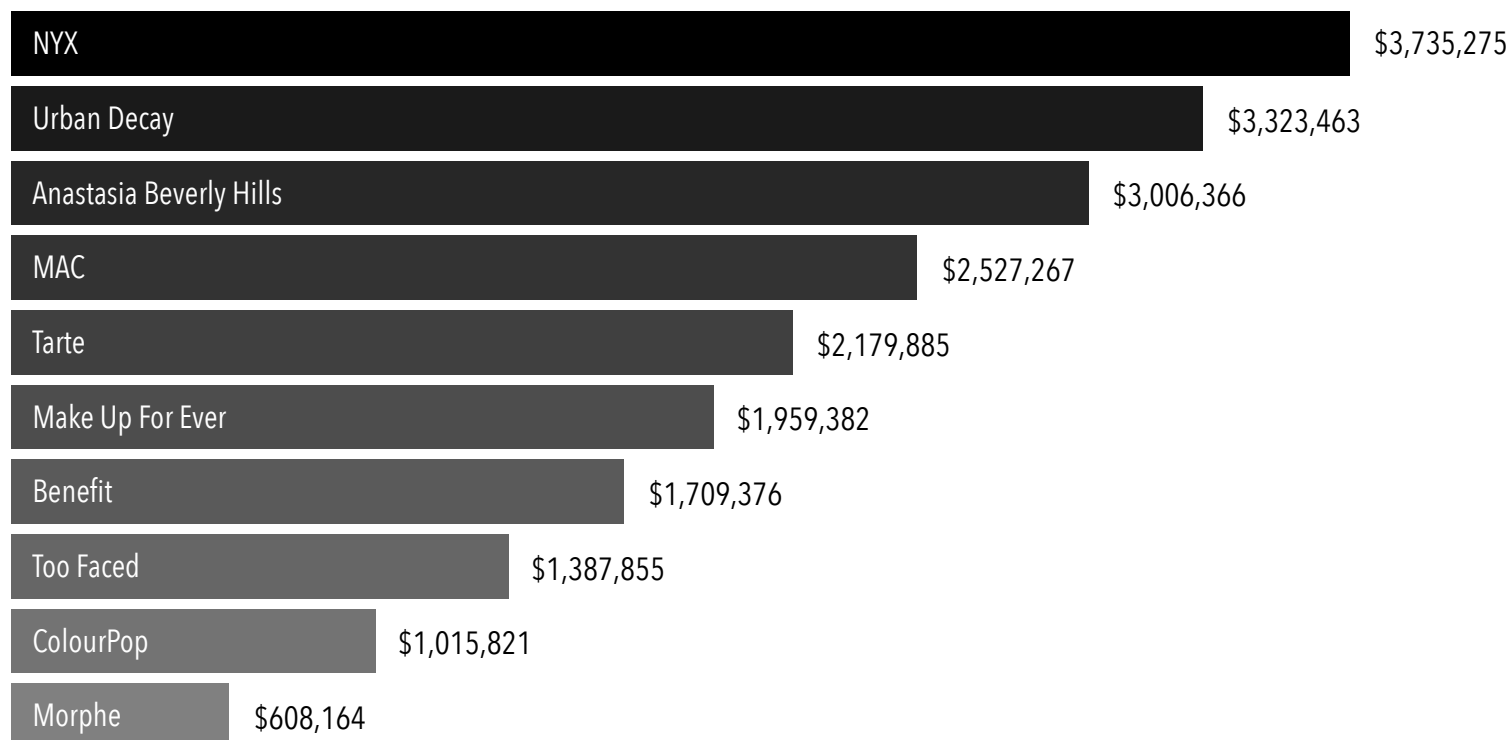
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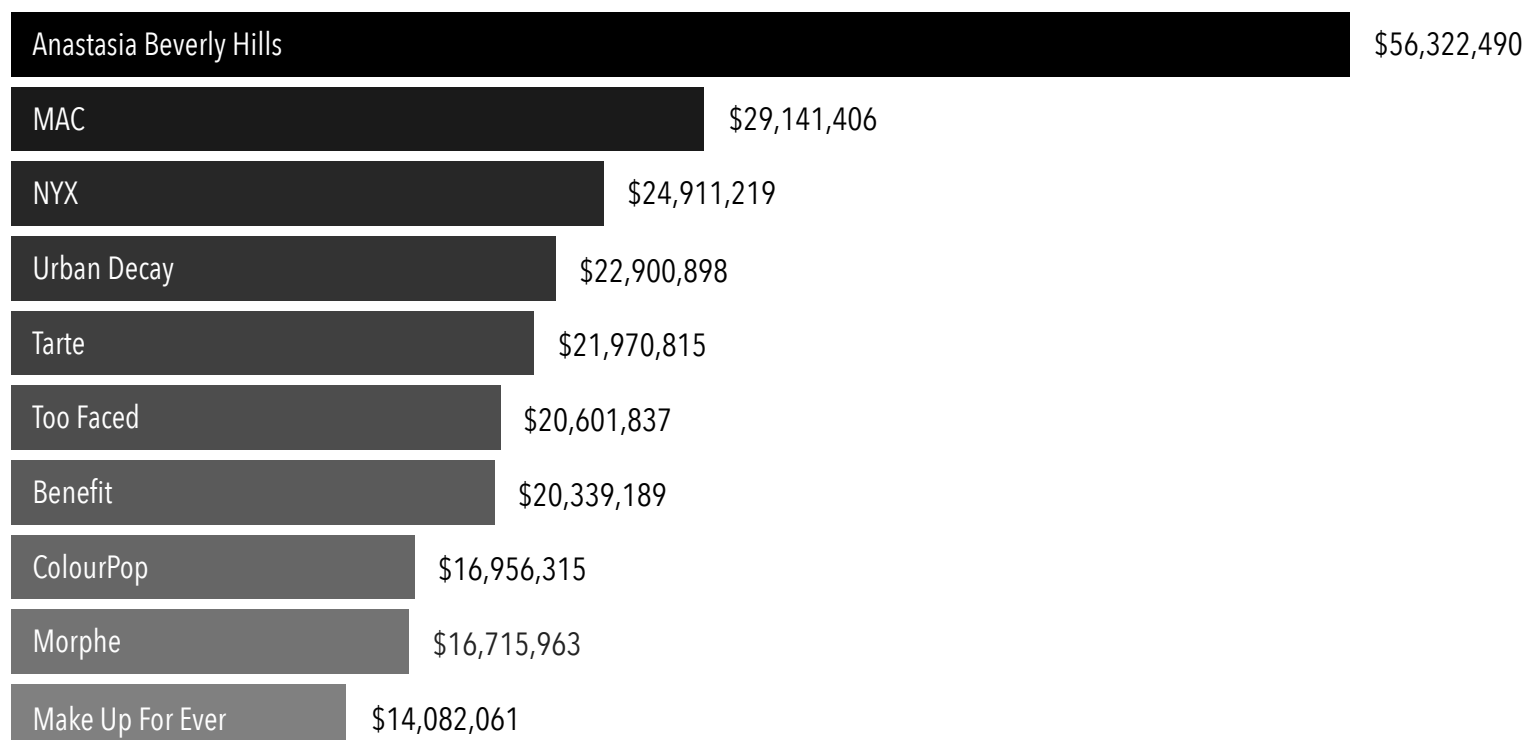
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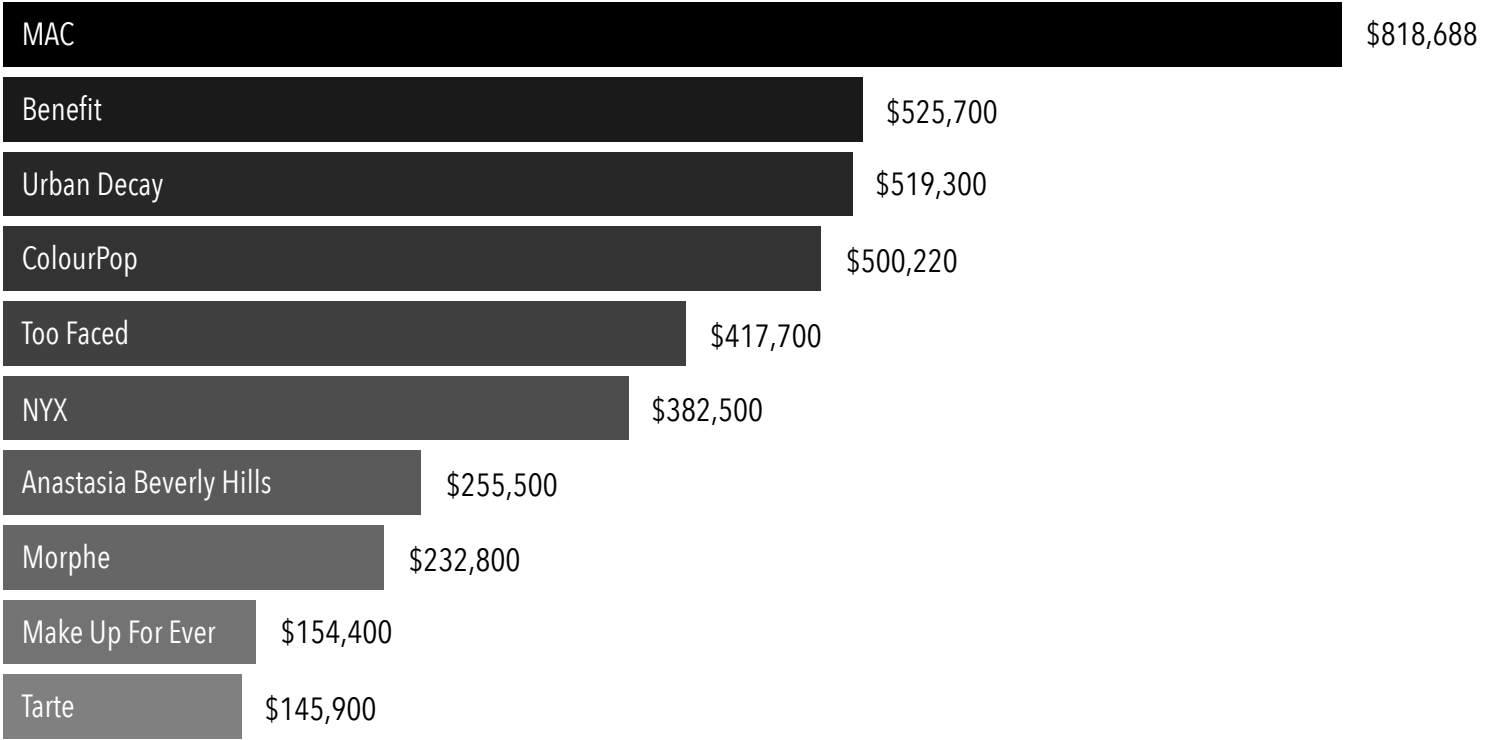
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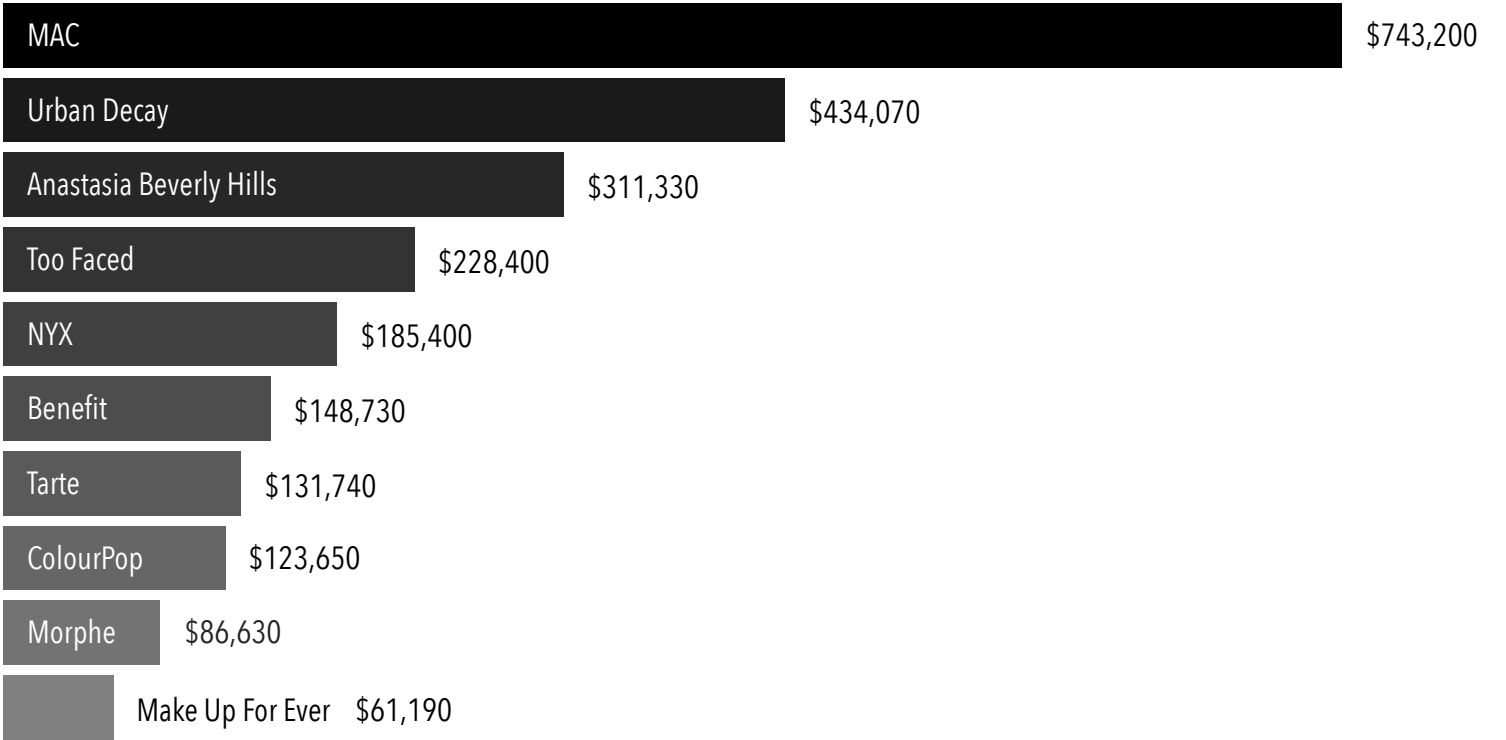
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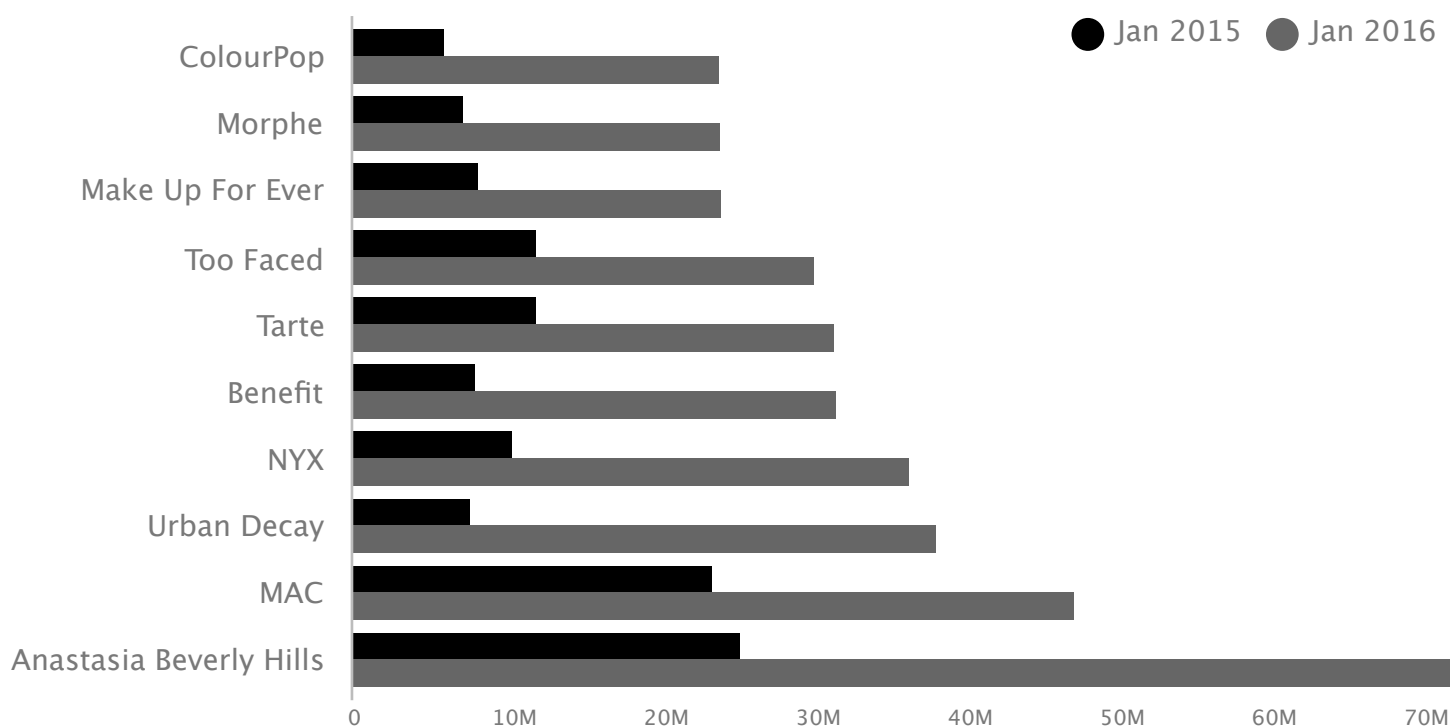
# TWITTER



# PINTEREST



# OVERALL TRENDING EMV



# Y/Y GROWTH

BRAND	JAN 2015	JAN 2016	Y/Y GROWTH
Anastasia Beverly Hills	\$24,984,398	\$70,969,142	184.05%
MAC	\$23,188,292	\$46,616,781	101.04%
Urban Decay	\$7,511,034	\$37,661,745	401.42%
NYX	\$10,285,357	\$35,908,632	249.12%
Benefit	\$7,829,082	\$31,208,292	298.62%
Tarte	\$11,803,228	\$31,064,803	163.19%
Too Faced	\$11,807,683	\$29,777,753	152.19%
Make Up For Ever	\$8,046,953	\$23,777,644	195.49%
Morphe	\$7,104,217	\$23,705,832	233.69%
ColourPop	\$5,850,272	\$23,627,661	303.87%



# Brand Spotlights

## MAC TAPS ARIANA GRANDE FOR NEWEST VIVA GLAM

**M**AC's January EMV was augmented by the anticipated release of the brand's latest Viva Glam campaign, featuring popstar Ariana Grande. The collection generated \$1.8M EMV in January alone, with the dark plum matte lipstick appearing as a favorite

among prominent influencers such as thatsheart and creativeboss. The lipstick was significantly more popular than the collection's light pink Lip Glass, which -- despite its similar branding and association with Grande -- produced only a fraction of the matte lipstick's EMV.

Ariana Grande's promotional post for MAC's latest Viva Glam collection garners 801K likes.



# TOO FACED DEBUTS NEW CHOCOLATE PALETTE



**T**oo Faced excelled in January, thanks to the release of Chocolate Bon Bons, the latest addition to its ever-popular family of Chocolate eyeshadow palettes. As with previous launches, Sephora was again instrumental in raising awareness for the palette's debut, creating online content pre-release

that incorporated shoppable links once the palette arrived. Loyal Too Faced fans showed their cult-like enthusiasm online: *grav3yardgirl* was responsible for three of the top five highest EMV-earning Instagrams for the brand, with each post mentioning the new palette and garnering 110K to 130K likes.

*Grav3yardgirl shows off a sultry Chocolate Bon Bons eyeshadow look, netting 112K likes.*

# NYX RELEASES "LINGERIE" LIP GLOSS LINE



NYX dominated on Facebook, thanks to influencer Pearypie's promotion of the new Lingerie collection of lip glosses on both her Facebook profile and Instagram feed. The makeup artist-turned-blogger's content creation contributed significantly to the \$1.2M EMV attributed to the launch in January. Overall, Pearypie was responsible for about \$1.7M EMV of NYX's overall EMV for the month, posting content from the brand's headquarters that showcased the production of the Lingerie line, as well as from the International Makeup Artist Trade Show (IMAT) in Thailand, where the influencer's first stop was the NYX Cosmetics booth.

Pearypie's shot of her extensive Lingerie lip gloss collection inspires 18K likes.

# URBAN DECAY SUSTAINS POPULARITY OF UDXGWEN

Urban Decay continued to push its promotion of the UDxGwen collection -- now including blushes, brow powders, and lip products -- with ample owned content on Instagram. With respect to earned media, influencers responded with their own colorful content creation on the channel, showcasing the Gwen Stefani collaboration's rockstar-esque packaging and flawlessly replicating the brand's rocker-chic personality. In addition to the success of the collection for the second month running, the brand's sustained earned media success was also largely owed to the popularity of its NAKED Skin product line, which drove high-engagement videos on YouTube that helped Urban Decay place third on the channel.

In January, the brand hosted a second UDxGwen event to celebrate the release of the lip, blush, and brow components of the collection. Unlike the launch party, Stefani herself was not in attendance at this event. Rather, the focus shifted to forming connections between the various influencers who had been invited. This time, the brand invited a different set of top-tier influencers from those who had attended the first event, engaging an entirely new community of beauty influencers. Two influencers at the event,



creativeboss and leighdicksonartistry, for example, avoid the popular glam, Kardashian-esque makeup looks and lean towards more extreme, colorful, and creative transformations. As a result, this alternative, “beauty with an edge” approach to makeup aligned closely with both the brand’s and Stefani’s identities.

Leighdicksonartistry (right) poses with creativeboss at a UDxGwen launch party, garnering 4.6K likes.



# The Evolution of the YouTube Tutorial



Jaclyn Hill's thorough, 40-minute "Best of Beauty 2015" video nets 1.2M views.

Without the proper blend of innovation and inspiration, earned content, like owned media, is susceptible to turning stale overtime. The influencers who accumulate the most views and subscribers operate under the belief that their channel is dual-purpose: for both education and entertainment. They provide something more meaningful beyond plain beauty expertise, whether it be humor, a la *gravy*girl, or a warm, open relatability like Ingrid Nilsen's.

On YouTube in particular, resourceful influencers have blended well-crafted personalities with cross-influencer collaborations and compelling storytelling to encourage loyal viewers to regularly tune in to view new videos.

# MATCH MADE IN HEAVEN: YOUTUBER COLLABORATIONS

A successful YouTuber collaboration is one whose pairing not only makes sense to the viewer, but provides an added element of entertainment or depth to the individual influencer's style. NikkieTutorials successfully complements her own content with collaborative videos in which she enthusiastically creates alongside other popular influencers. The influencer has partnered with a wide range of social stars, including Jeffree Starr, Huda Beauty, and Desi Perkins. These videos bring heightened exposure to all parties involved, with the potential to reach entirely new communities of subscribers.

In January, NikkieTutorials collaborated with Kurtis Dam-Mikkelsen ("Miss Fame"), who had previously been a contestant on Season 7 of "RuPaul's Drag Race." The banter-filled "Get Ready With Me" video played more like a casual conversation between two friends, with the two influencers standing side-by-side, simultaneously giving themselves makeovers. In between instructions, the two discussed Miss Fame's experience on "RuPaul," with NikkieTutorials commending her transformative powers in makeup artistry with statements like, "If you are new to Kurtis, pay attention."

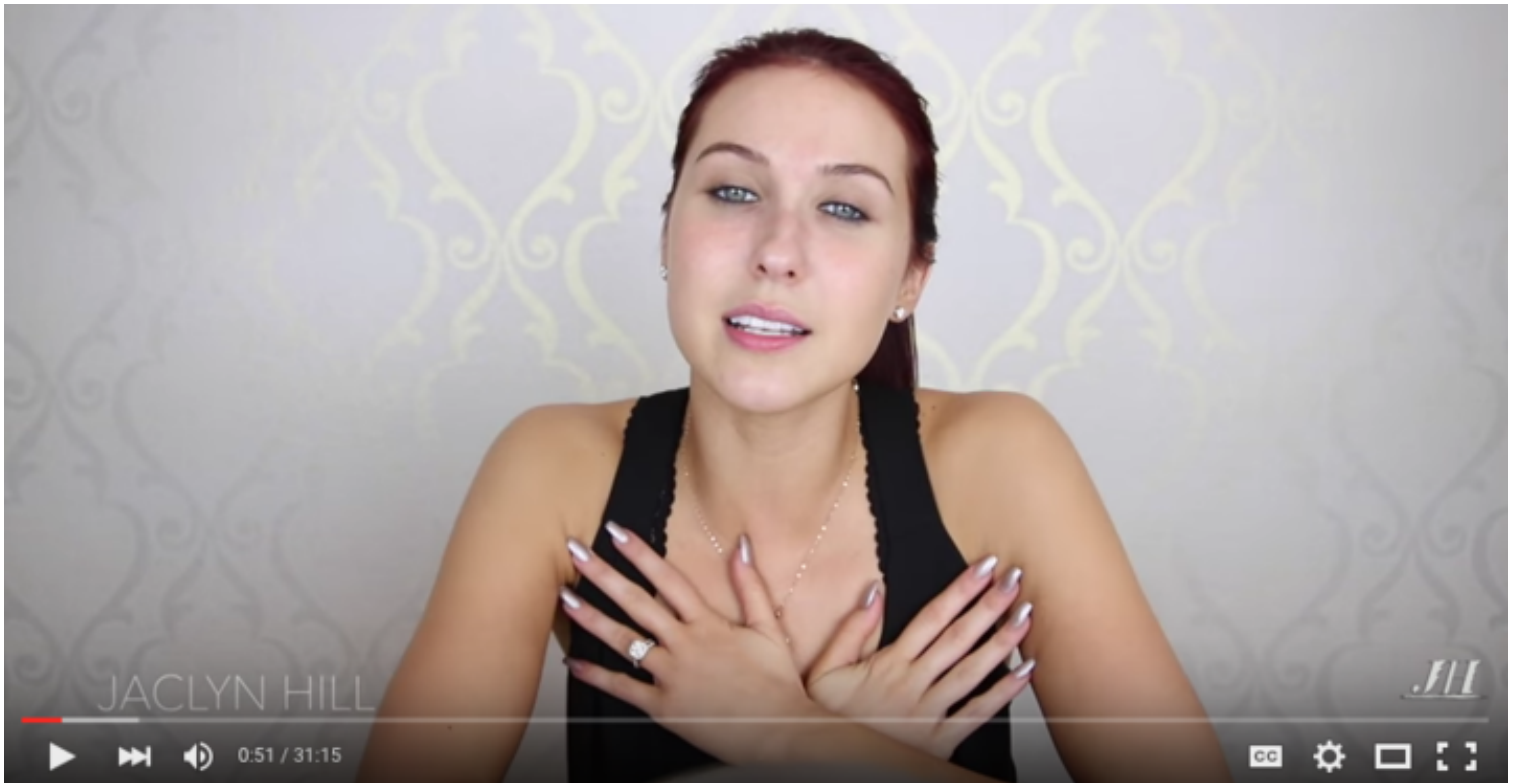
In the 18-minute collaborative video, Miss Fame reinforced NikkieTutorials' personal brand value proposition: "the power of



beauty," or "beauty with no boundaries," as Miss Fame described it. NikkieTutorials describes having first encountered Miss Fame during her own search for contouring-themed tutorials and immediately falling in love with the magical transformation that the influencer underwent in an early tutorial. Furthermore, when asked by NikkieTutorials on what she liked most about being on the "RuPaul" runway, Miss Fame described the empowerment she felt from the show's underlying message: that gender doesn't have to play a part in one's understanding of a beautiful persona. The collaboration was successful not just because of the video's humorous tone or entertaining dynamic, but because Miss Fame reinforced NikkieTutorials' personal, emotionally charged mantra that makeup can be empowering.

NikkieTutorials collaborates with Miss Fame on a "Get Ready With Me" video that received 1.5M views.

# VIEWER INVESTMENT IN AN ONGOING NARRATIVE



With a style that is neither flashy nor gimmicky, Jaclyn Hill is, in many respects, YouTube's storytelling queen. The influencer stands out by frequently publishing lengthy videos expressly meant to update avid fans on both her personal and professional lives.

Over the years, Jaclyn has built a community of followers who are invested in her career as if it were their own, feeling a sense of personal triumph when Jaclyn first collaborated with Becca Cosmetics and again when she announced the launch of her own makeup line. Two of her highest-engagement videos published in January, "Best of Beauty 2015" and "Update + Chit Chat + Get Ready With Me," which are 40 and 31 minutes long, respectively, begin with extended introductions, a response to

numerous follower requests for Jaclyn's "general life" updates. The latter, filmed in her brand new "beauty room," was emblematic of the influencer's narrative, a conversation between friends. Before beginning the tutorial component of the video, Jaclyn chats casually with her audience. "I didn't want to just sit here like a robot and just like talk to you," she says. "Chit chat, hang out, and do what girls do best. This is my favorite thing to do with friends."

Jaclyn's incredibly loyal following of fans is owed to the way that she thoughtfully inserts them into her video conversations about the trajectory of her career. As a result, each fan feels partly responsible for Jaclyn's success and all the more devoted to helping her accomplish her goals in the future.

Jaclyn Hill shares about her career in "Update + Chit Chat + Get Ready With Me," which received 1.1M views.



# Influencers Leverage Snapchat to Boost Engagement

More and more influencers are reaching beyond traditional social media and turning to Snapchat to extend engagement with their respective audiences. Although the platform remains largely unmeasurable from an earned media perspective, there are still significant strategic benefits to partnering with influencers who are already actively creating content on Snapchat.

## SNAPCHAT'S APPEAL TO INFLUENCERS

### Intimate Yet Accessible Content

Influencers are able to give followers very personal glimpses into their daily lives and activities. They can share content as one friend to another, making themselves more relatable to the everyday beauty enthusiast.

### Cost-Effective, Easy Exposure

With minimal time and monetary investment, the platform produces compelling content that contributes to an overarching narrative, strengthens the influencer's personal brand, and encourages an emotional connection between the influencer and follower.

### A Millennial Touchpoint

The platform provides targeted visibility among the millennial demographic, the community with the greatest tendency towards valuable engagement and long term loyalty online. Just as with consistent content creation on other platforms, followers begin to anticipate and look forward to Snaps and updated Snapchat stories.



Nikkietutorial's Instagram promoting her Snapchat channel garners 94.8K likes.

## WHY SHOULD BRANDS WORK WITH INFLUENCERS WHO USE SNAPCHAT?



Even if brands are not directly benefiting from endorsements made on Snapchat, the channel's power comes from the unscripted quality of the content. By working with influencers already using the platform as a complement to content creation on YouTube, Instagram, etc., brands can be naturally integrated into the influencer's personal story and the development of their career.

Influencers like [jaclynhill](#), [nikkietutorials](#), and [mannymua](#) have augmented their talent for storytelling via Snapchat. In the absence of a traditional format, the app allows for greater creativity, whether it comes in the form of a

regular Snap, video, or Snapchat story, or utilizes one of the many animation features now available on the platform. The unique, instantaneous nature of Snapchat's publishing format further closes the gap between influencer and follower, enabling users to feel temporally synced with the lives of their beauty role models. Moreover, this imperfect and raw content provides a refreshing contrast to the sophisticated and editorial-quality content that the same influencers share on Youtube and Instagram. Snapchat provides a window into the day-to-day lives of influencers with content that balances aspirational and relatable appeal.

Jaclyn Hill praises her "Snapchat family" in an Instagram post, netting 123K likes.