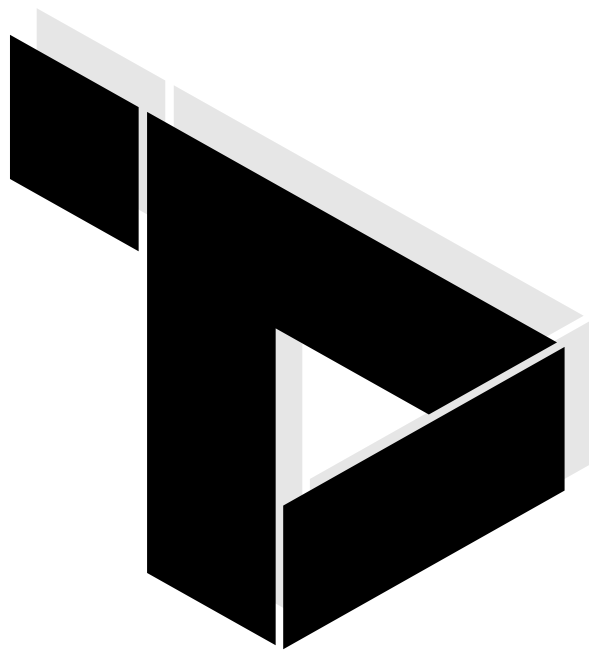


LA MODE JANUARY

SKINCARE EDITION 2016



ANALYSIS BY
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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

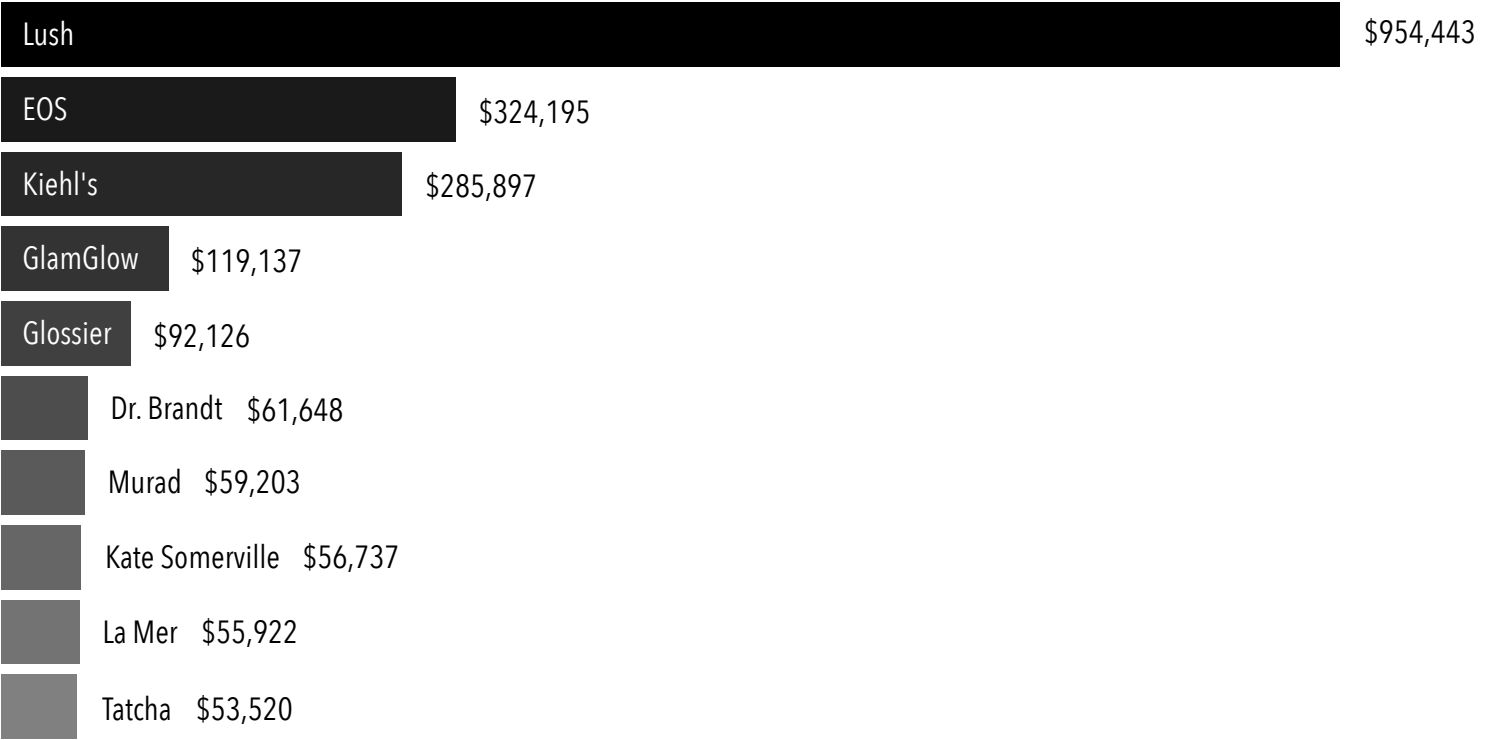
Top 10 Brands

Lush	\$6,726,145
EOS	\$4,605,645
Tatcha	\$2,510,537
Glossier	\$2,069,117
Dr. Brandt	\$1,680,736
La Mer	\$1,451,334
GlamGlow	\$1,440,897
Murad	\$1,422,674
Kate Somerville	\$1,385,002
Kiehl's	\$1,382,395

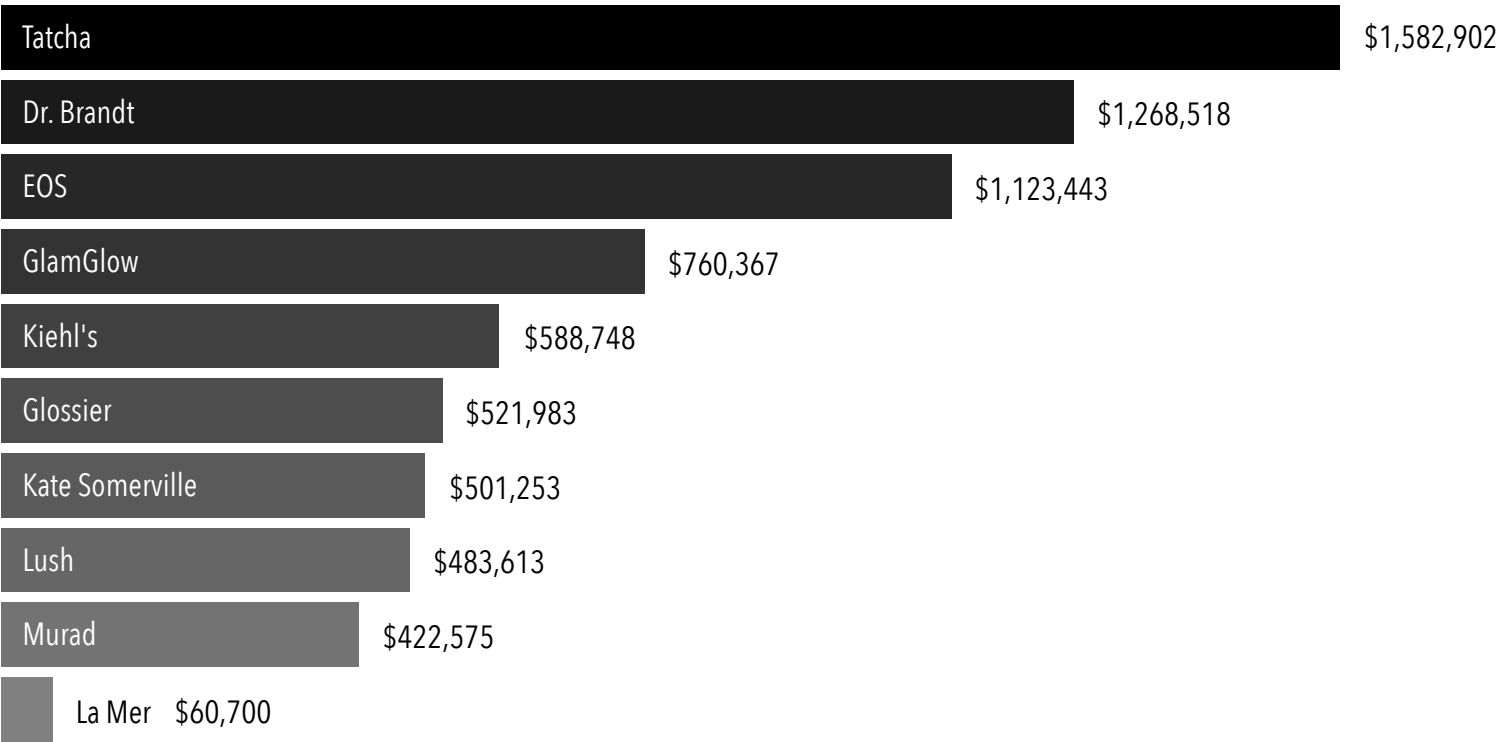
THE TOP 10

Earned Media Performance By Channel

BLOG



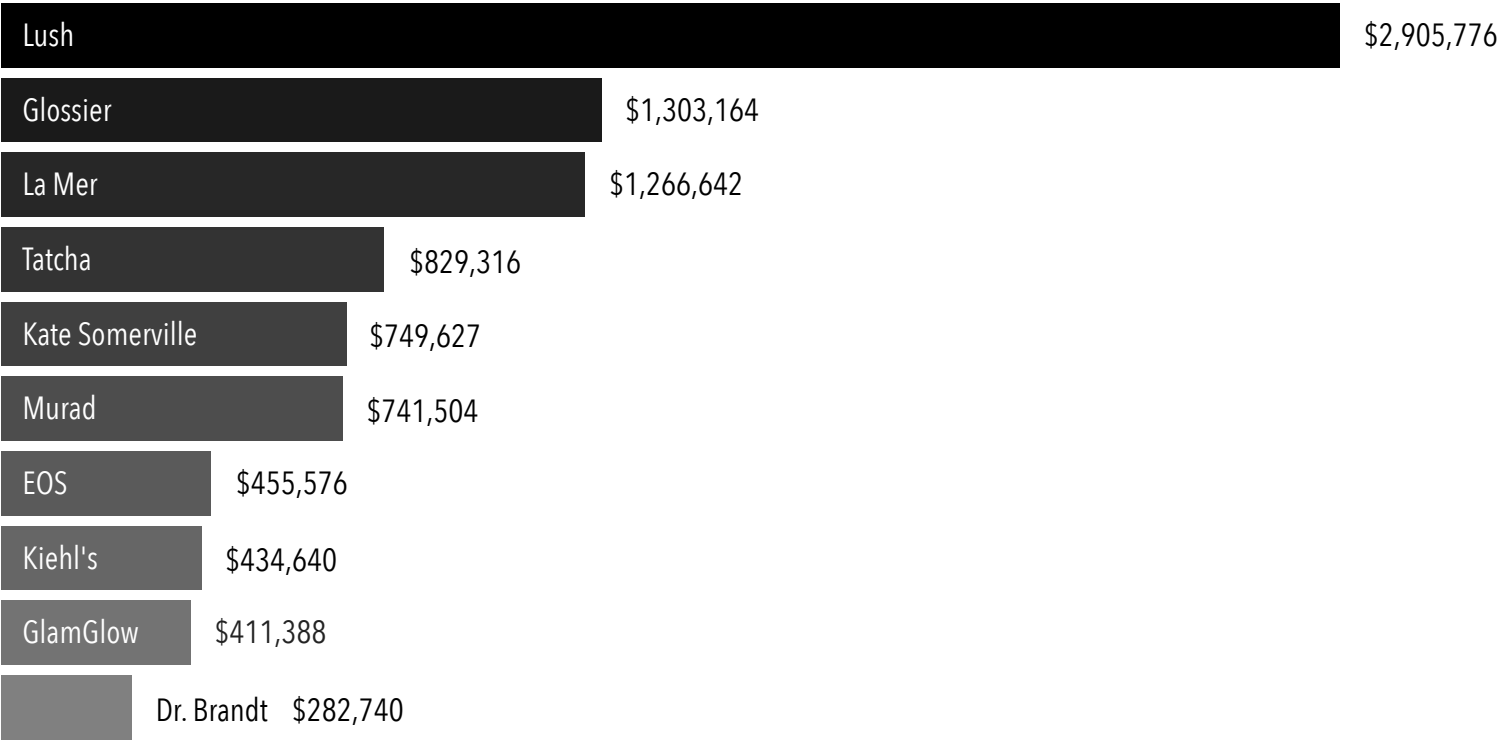
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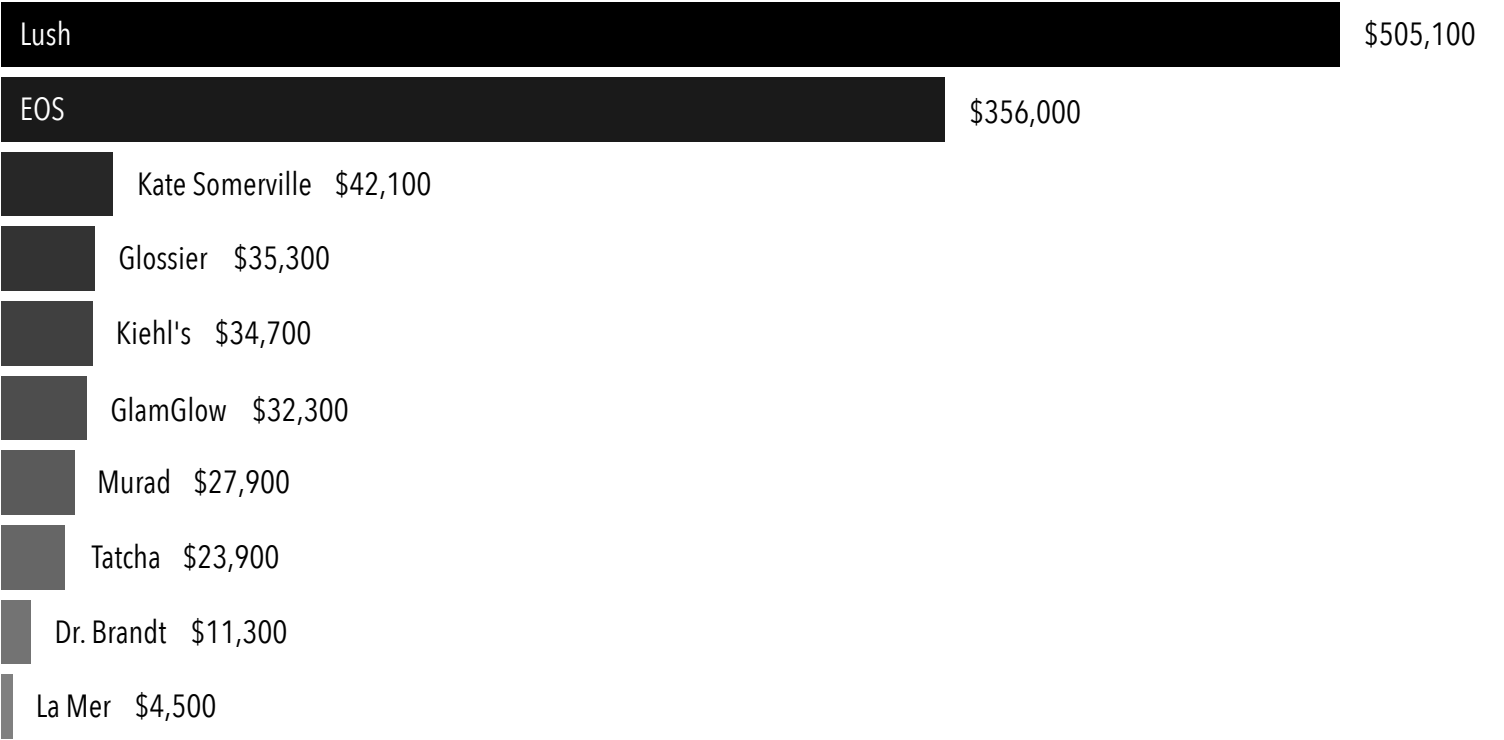
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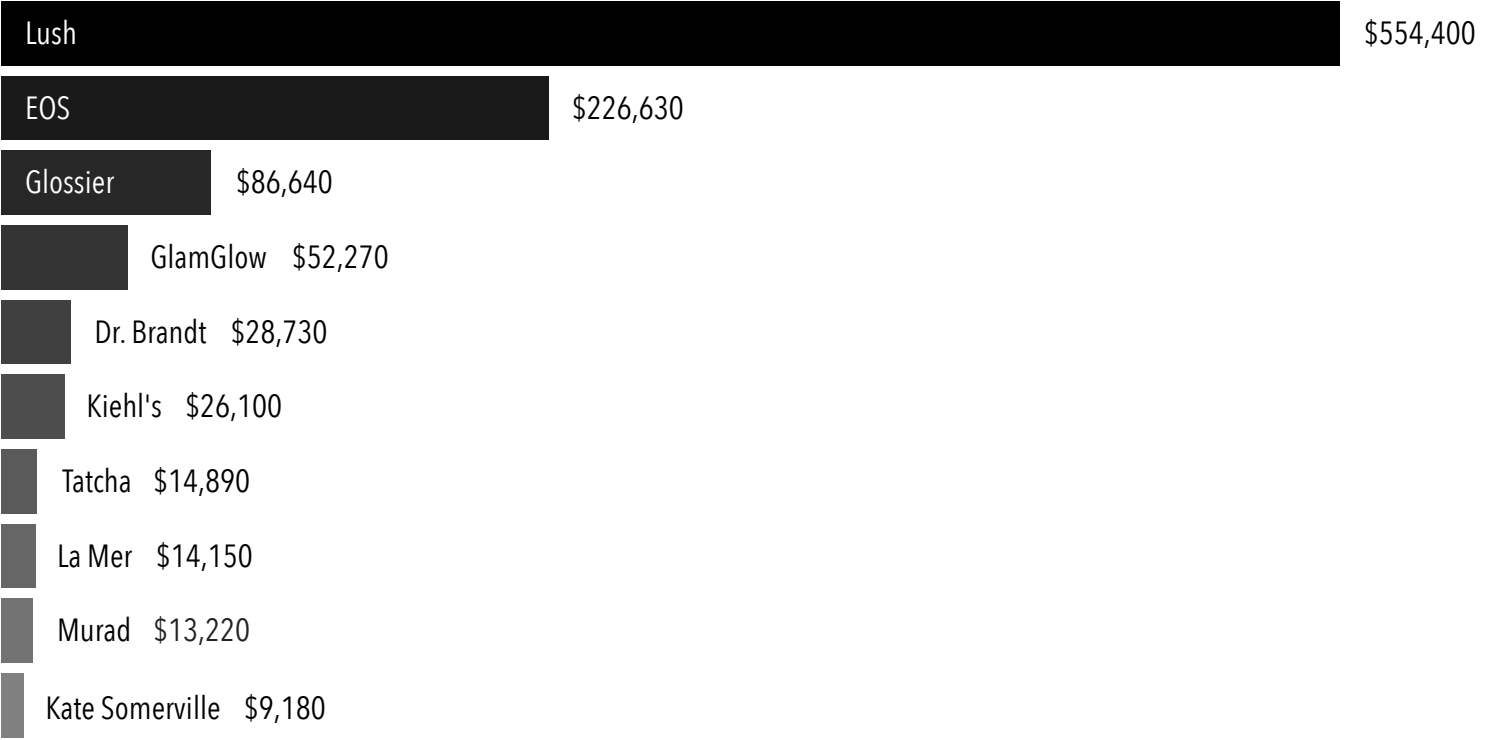
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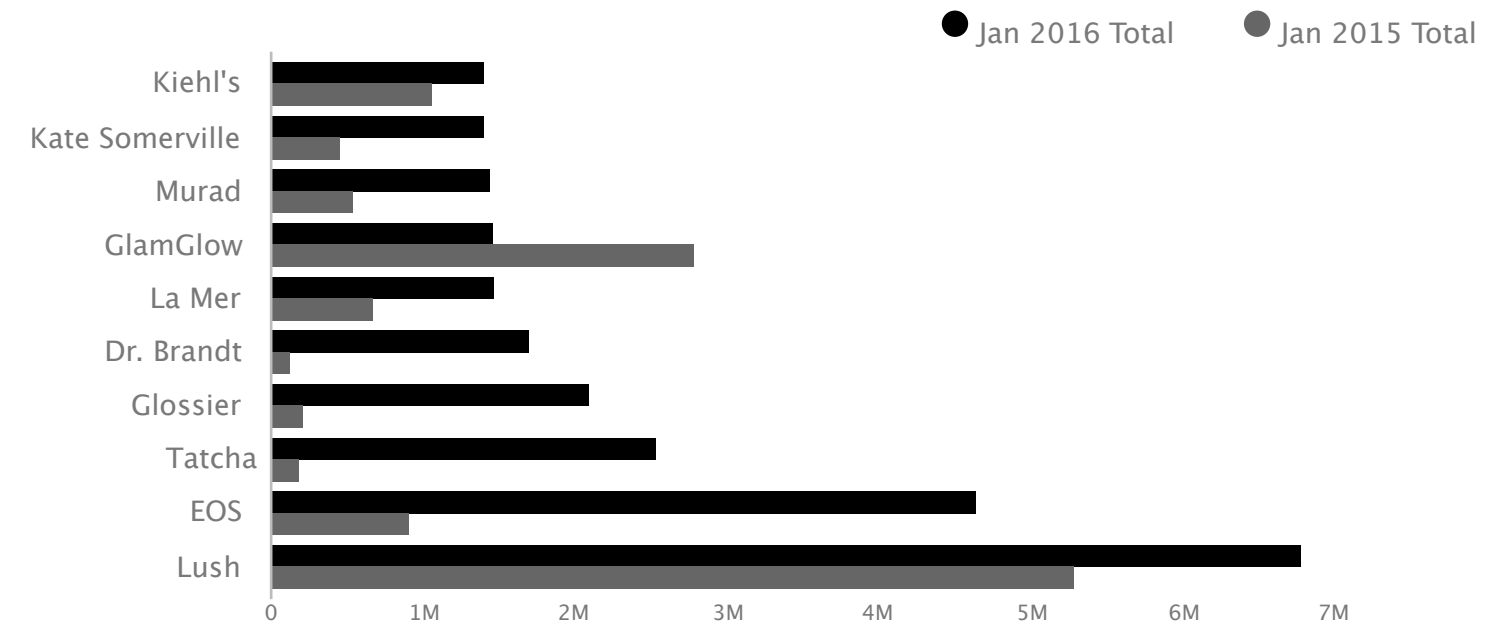
TWITTER



PINTEREST



OVERALL TRENDING EMV



Y/Y GROWTH

BRAND	JAN 2016	JAN 2015	Y/Y GROWTH
Lush	\$6,726,145	\$5,245,454	28.23%
EOS	\$4,605,645	\$890,778	417.04%
Tatcha	\$2,510,537	\$174,971	1334.83%
Glossier	\$2,069,117	\$200,500	931.98%
Dr. Brandt	\$1,680,736	\$116,807	1338.91%
La Mer	\$1,451,334	\$657,783	120.64%
GlamGlow	\$1,440,897	\$2,759,741	-47.79%
Murad	\$1,422,674	\$525,070	170.95%
Kate Somerville	\$1,385,002	\$444,497	211.59%
Kiehl's	\$1,382,395	\$1,040,685	32.84%

Kiehl's

Embraces the Beauty of Adventure

Beyond its usual inclusion in top EMV-earning “Get Ready With Me” and “favorites” videos from top-tier influencers like Ingrid Nilsen and HelloOctoberxo, Kiehl's demonstrated social influencer savvy with its #myadventure campaign that earned the brand \$93.9K EMV in January.

The #myadventure campaign demonstrated influencer marketing expertise by employing a low-barrier-to-entry contest that enveloped Kiehl's into memorable user experiences, incorporated the promotion of the newly released Ultra Facial Deep Moisture Balm, and catalyzed the creation of visually engaging content. To enter Kiehl's #myadventure sweepstakes, users needed only to post a photo (to either their own Instagram, Facebook, or Twitter, or to Kiehl's owned website) and include “sweeps entry” and “#myadventure” in the caption. The winners would receive free flights and lodging for their next adventure, but other entrants experienced some form of return on their engagement as well. For every entry photo posted to its website, Kiehl's responded by assigning the entrant a product recommendation, based on the locale featured in the photo. For sun-soaked destinations, Kiehl's recommended products with SPF, while for locales with harsher



weather, Kiehl's promoted its newly launched Ultra Facial Deep Moisture Balm.

Through the #myadventure initiative, Kiehl's managed to subtly promote a new product while still focusing the contest on user experiences beyond the scope of daily beauty routines. Kiehl's incorporated itself into its

Asenseofhuber's vibrant #myadventure Instagram garners 3.6K likes



Asenseofhuber's breathtaking experience with nature, tagged #myadventure, inspires 4.9K likes.

consumers' stories, then overtly tied their emotional and visually captivating memories to the brand for other followers to witness. Asenseofhuber, who contributed \$90.8K EMV to the campaign, posted visually captivating and experience-laden photos of himself wandering on sand dunes and gazing up through underground caves. The influencer's posts promoted the inclusion of the Kiehl's brand in scenarios outside the typical skincare routine and into the memorable moments of life's adventures. Kiehl's utilized its owned Instagram account to repost entry photos, demonstrating a prompt attention to its audience and providing entrants a reward of recognition from the brand.

Glossier

Blends Diversity and Aspiration in Influencer Selection



Iamkareno's cozy arrangement of Glossier face products earns 5.7K likes.

Glossier demonstrated thoughtful influencer marketing by selectively engaging bloggers whose inclusion of Glossier in their social narratives enriched and expanded awareness of the up-and-coming Glossier brand.

In January, Glossier curated an on-brand community of influencers to promote the release of its Milky Jelly Cleanser. Though the relationships between Glossier and these women appeared formal, with influencer posts offering followers discount codes, the brand's selection of influencers remained compelling: each influencer displayed a unique personality and narrative. This range of personalities not only indicates the breadth of influencers that Glossier was able to incorporate into its product promotion, but also the wide audience that these bloggers draw as a collective.

Alexcentomo, who epitomizes the effortlessly cool, beach-haired and globe-trotting influencer, boasts 782K Instagram followers and earned \$151.1K EMV with her "milkyjellyalex" promo code in January. Meanwhile, iamkareno, who has 406k Instagram followers and generated \$64.5K EMV for

Glossier around her “milkyjellykareno” promo code, embodies the beautiful but brazenly off-kilter It Girl. In total, influencers who promoted a personalized a Glossier discount code earned the brand \$265.9K EMV.

Although alexcentomo and iamkareno, along with the other Milky Jelly influencers, speak to different audiences, their unique personalities constitute their strongest selling points. By engaging women whose social profiles are notable for unabashedly declaring a personal brand (as opposed to high follower counts), Glossier demonstrated that its interest in the influencers was founded in each woman’s voice and opinion, rather than in immediate marketing return. Instead of forcing the Glossier voice through each woman’s feed, Glossier aligned its brand with the personal brands of the influencers, thereby reinforcing the accessibility of the brand through a multi-faceted definition of beauty and what it means to be “cool.” Consequently, the two commonalities that these women share -- that “je ne c’est quoi” attitude and a preference for the Glossier Milky Jelly -- create a powerful association between the brand and an aspirational ideal, catalyzing consumers to self-identify with the Glossier brand.

Glossier also replicated its selective influencer engagement with established influencers evachen212 and jenatkinhair. Evachen212’s playful GIF of Glossier founder Emily Weiss giving her a facial brings her relationship with the brand to life, and jenatkinhair’s photo of the Glossier showroom gives followers a glimpse into the physical birthplace of Glossier,



earning the brand a combined \$47.3K EMV. Though these two women did not contribute to the promotion of the Milky Jelly Cleanser, their engagement with Glossier maintained the aspirational quality of the Glossier brand and intimated a personal relationship with Glossier via their friendship with the founder. If the mid-tier cadre of Milky Jelly promoters incorporated Glossier into accessible, but still cool and unique, narratives, then this “insider circle” level of influencers presented a peek into the more exclusive echelons of the brand.

In both cases, Glossier’s concern with maintaining the genuine voice of every beauty blogger that it works with reflects the brand’s attention to developing real relationships with its influencers. These very relationships are poised to bear large returns toward the development of Glossier’s growing brand personality.

Evachen212 receives a playful facial from founder Emily Weiss, netting 4.3K likes.

Tatcha

Gets a Boost from Hero Product Buzz



Jaclyn Hill's video roundup of 2015 favorites, which included the Luminous Dewy Skin Mist, earns 1.2M views.

Tatcha's January rise in EMV stemmed from top-tier influencer endorsement of the brand's Luminous Dewy Skin Mist, with mentions of the product earning \$1.0M EMV for the brand in January compared to the \$61.8K EMV that the product earned in December). Jaclyn Hill and KathleenLights both included the product in their "Best Products of 2015" roundup videos, while NikkieTutorials incorporated the product into three different makeup tutorial videos. In each case, influencers commented on how much they loved the product as another priming step before applying makeup, but not without pointing out the high price-point of the product. Though Tatcha's rise in EMV from December to January bumps the brand into the top 10 performing brands for January, the difference does not apparently result from a significant effort from the brand to engage and mobilize influencers. Rather, Tatcha's newfound presence in social conversations creates the ideal stage for Tatcha to now make a foray into influencer marketing initiatives.

Fresh

Bolsters Brand Personality with Aligned Influencer

Fresh worked with powerhouse influencer Chriselle Lim to develop the brand's identity as committed to providing blissful, zen-like beauty experiences through natural, high-quality products. Although Fresh was not in this month's top 10, its choice to align with Lim's serene, artful aesthetic exemplifies thoughtful influencer engagement that reinforces fundamental brand elements through user-generated content.

Fresh and Lim collaborated on a video in which Lim walks viewers through a peaceful beauty ritual. Set against a forest backdrop with faint, soothing music, Lim describes her serum as her "secret weapon" and says she is most "at peace" when performing her beauty ritual. Product shots from Fresh's Black Tea collection are interspersed with shots of Lim pouring tea from a vintage-inspired tea kettle and running her fingers through dried black tea leaves. Lim seamlessly integrates the brand into the video, handling Fresh products with the same elegance with which she holds the tea leaves and kettle. Lim teased the release of the collaborative video with two Instagram and two Facebook posts, accumulating an influential \$106.1K EMV.



Separately, Fresh used its own media to augment Lim's authority and relevance to its brand by featuring her among the "Fresh People" profiles on its website, describing the influencer as a "digital influencer and style icon." Though

Chrisellelim embraces the tranquil outdoors in a scene from her collaborative video for Fresh, garnering 4.9K likes.



A serene shot from Chriselle Lim's video for Fresh earns 6.8K likes.

this owned content was not a significant driver of conversations on earned media, highlighting Lim reinforced the brand's reverence for the blogger. The feature demonstrated the value that Fresh places in their relationship in a manner that is validating to the individual influencer and encouraging of aspiring bloggers who might also be interested in partnering with the brand.

Fresh's multifaceted relationship development with Lim, exemplified through the integration of the influencer into both owned and earned media, reiterates the brand's genuine devotion to, and respect for, Lim as a brand ambassador and member of the Fresh family. This relationship, based on aesthetic substance and not commercial intent, lays the foundation for a fruitful and longstanding influencer relationship.