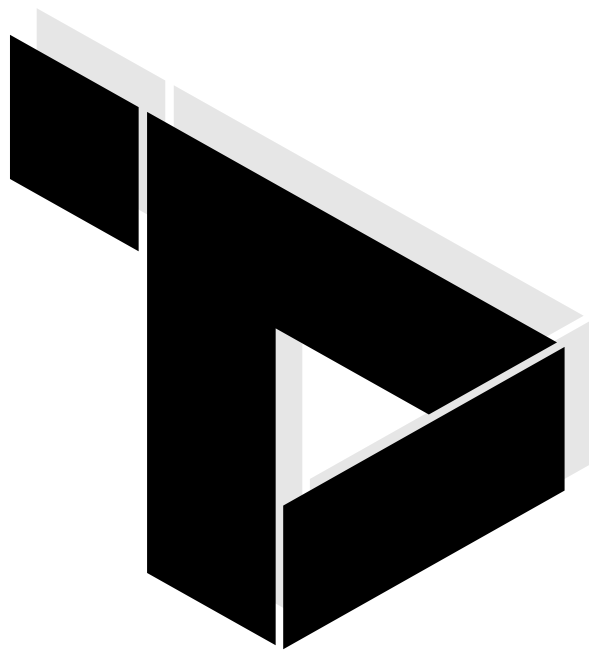


LA MODE APRIL

SKINCARE EDITION 2016



ANALYSIS BY
GRACE CHAO & MERISSA REN

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 consistently improve our measurement of earned media performance. 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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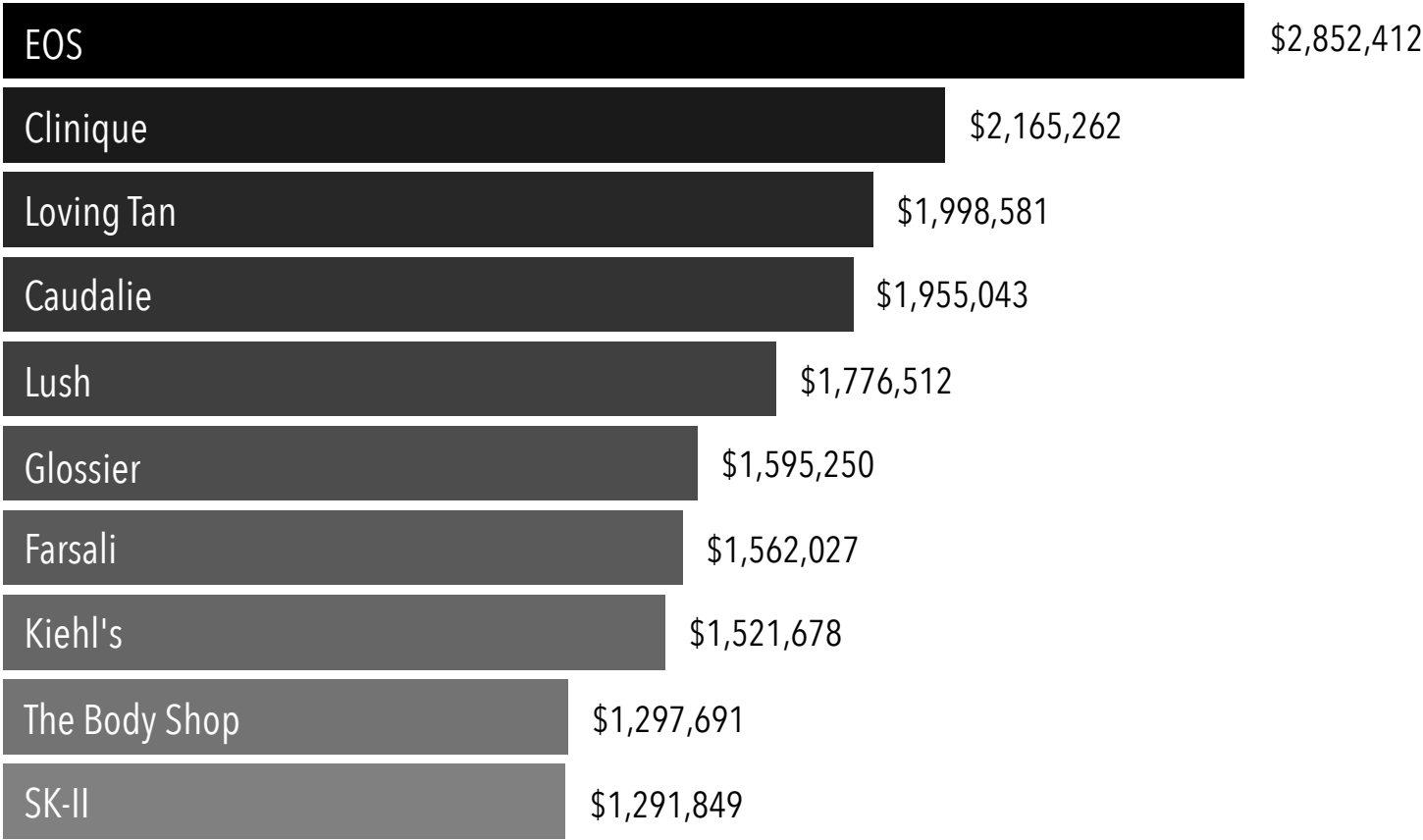
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THE TOP 10

Earned Media Value Leaderboard

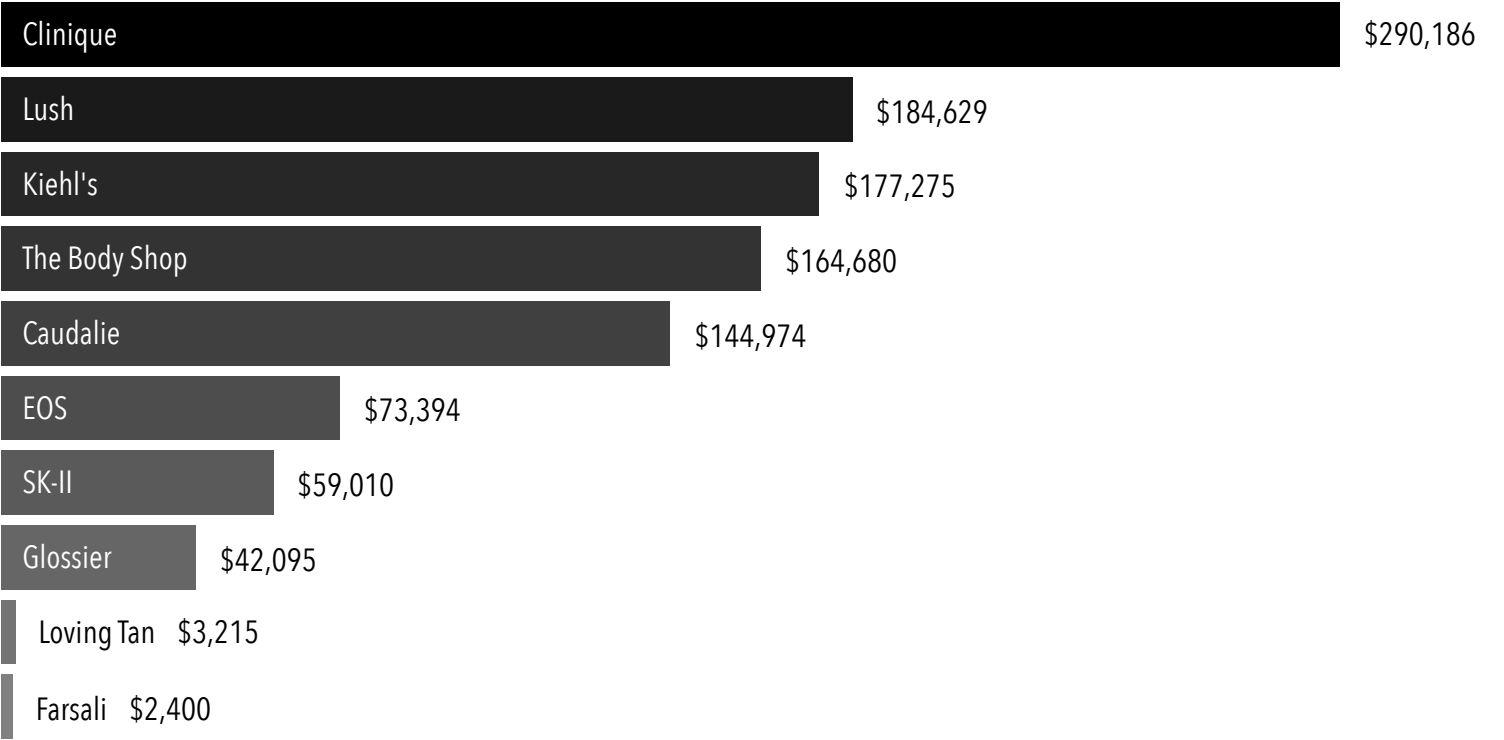
Top 10 Brands by EMV



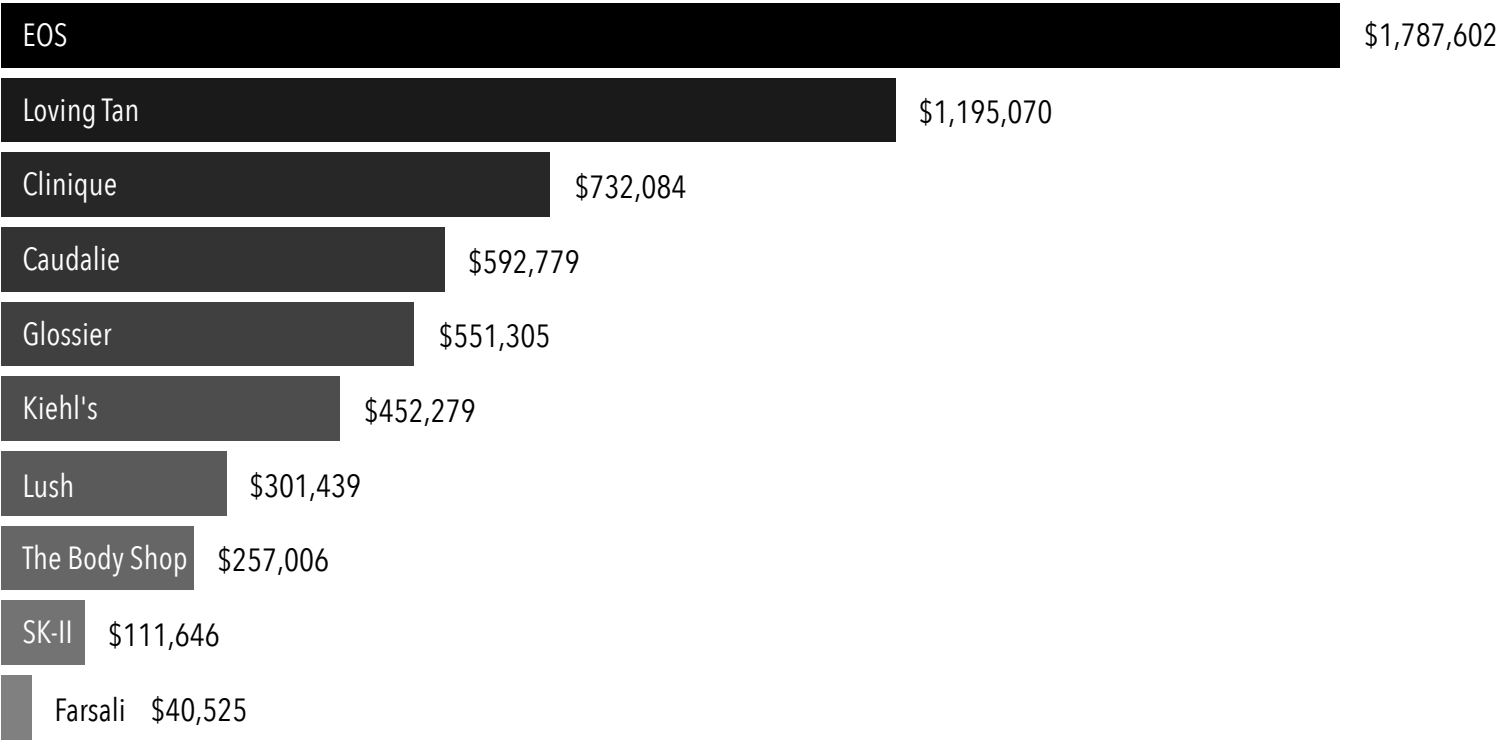
THE TOP 10

Earned Media Performance By Channel

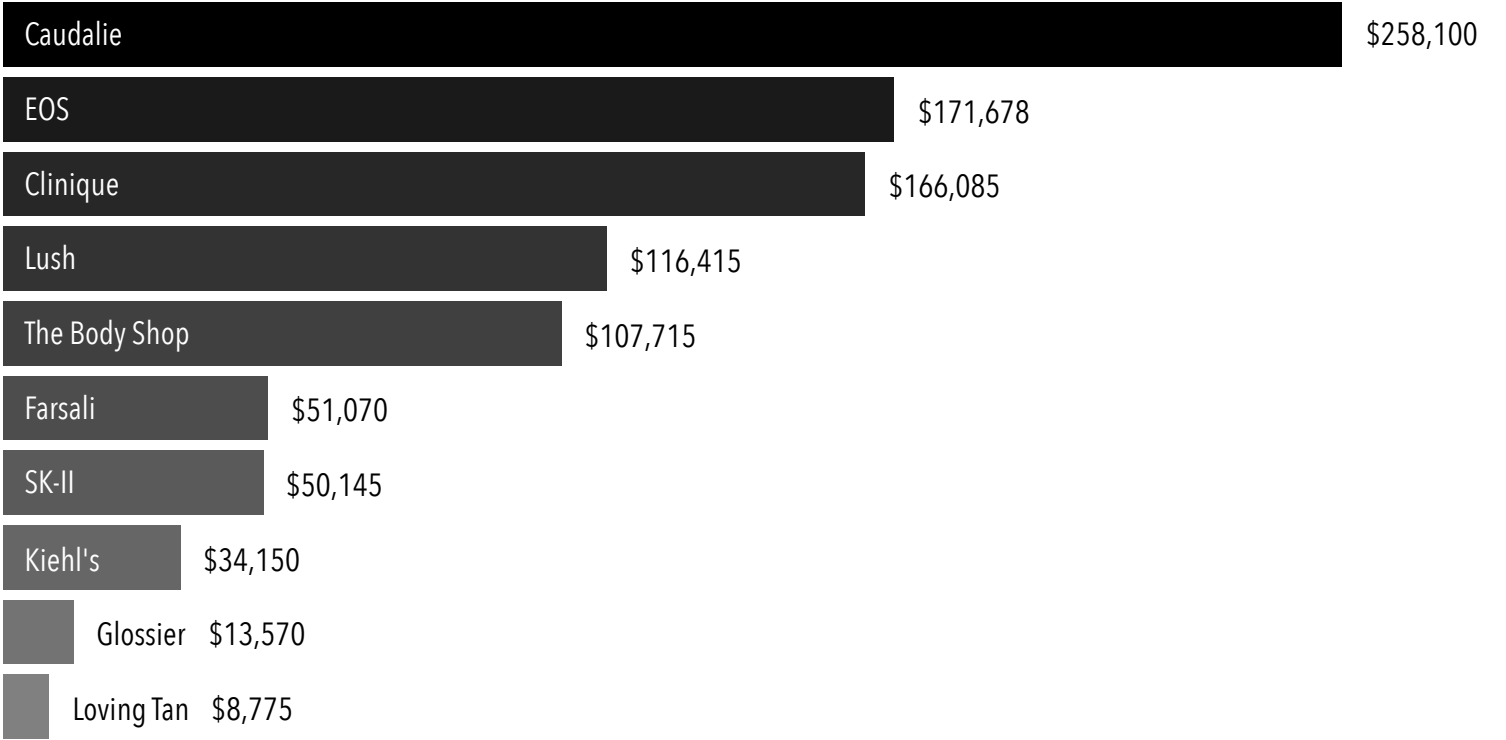
BLOG



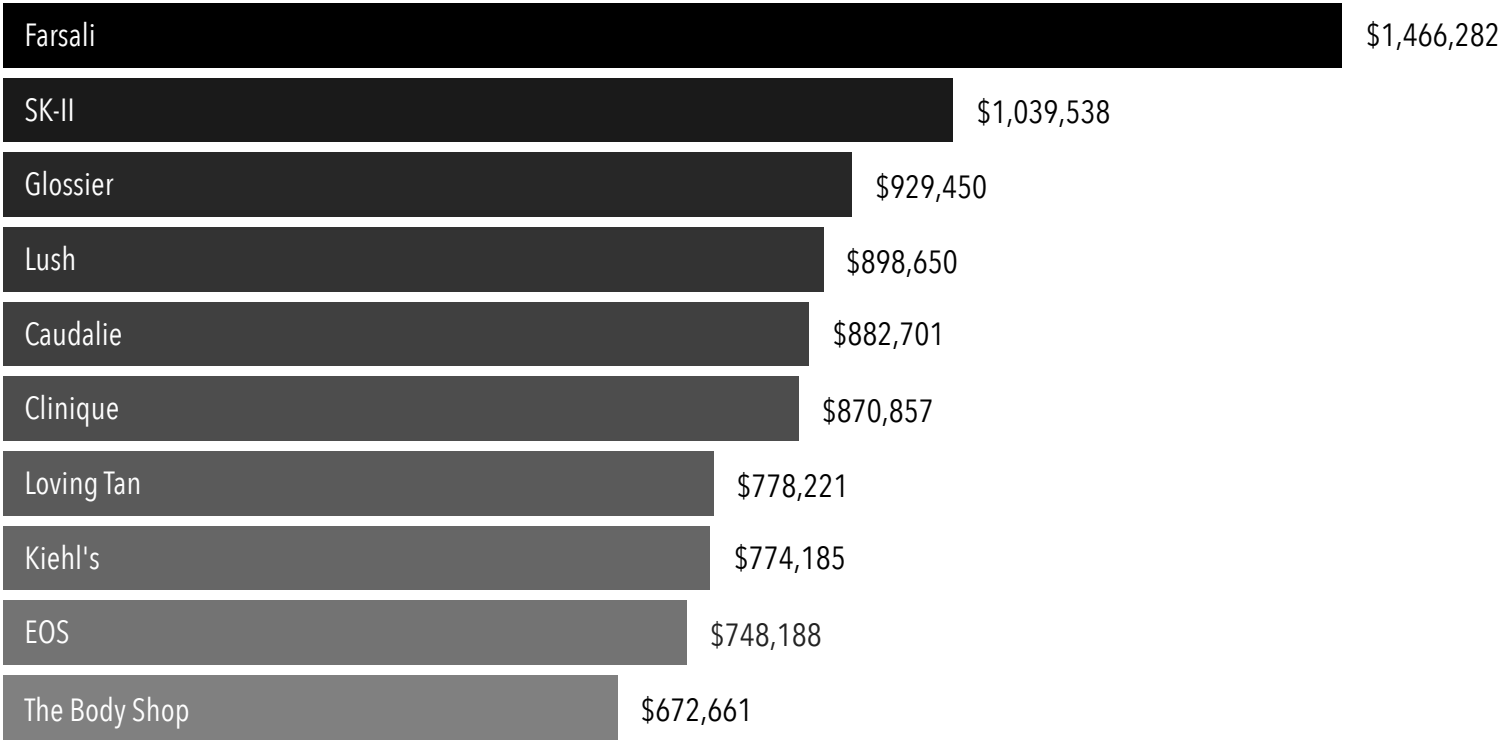
YOUTUBE



FACEBOOK



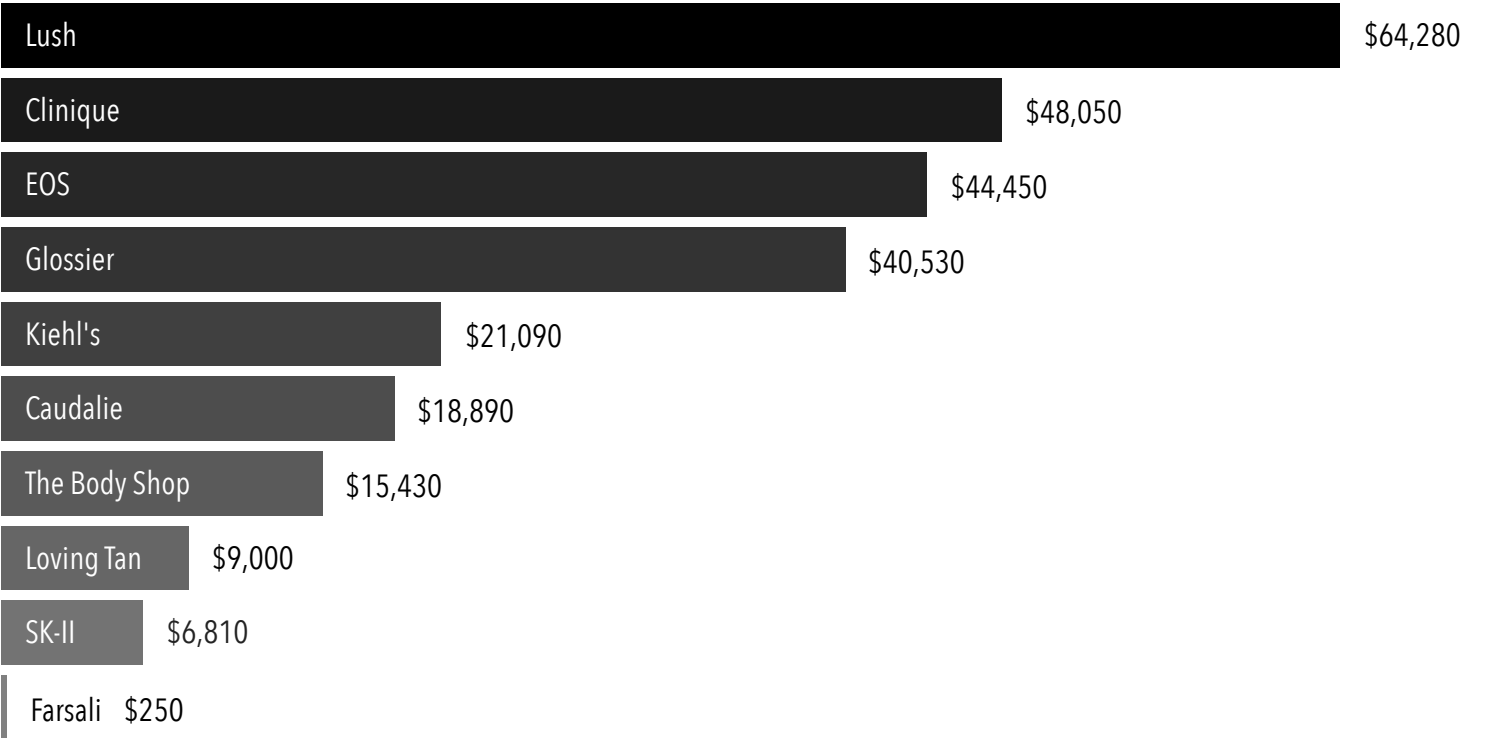
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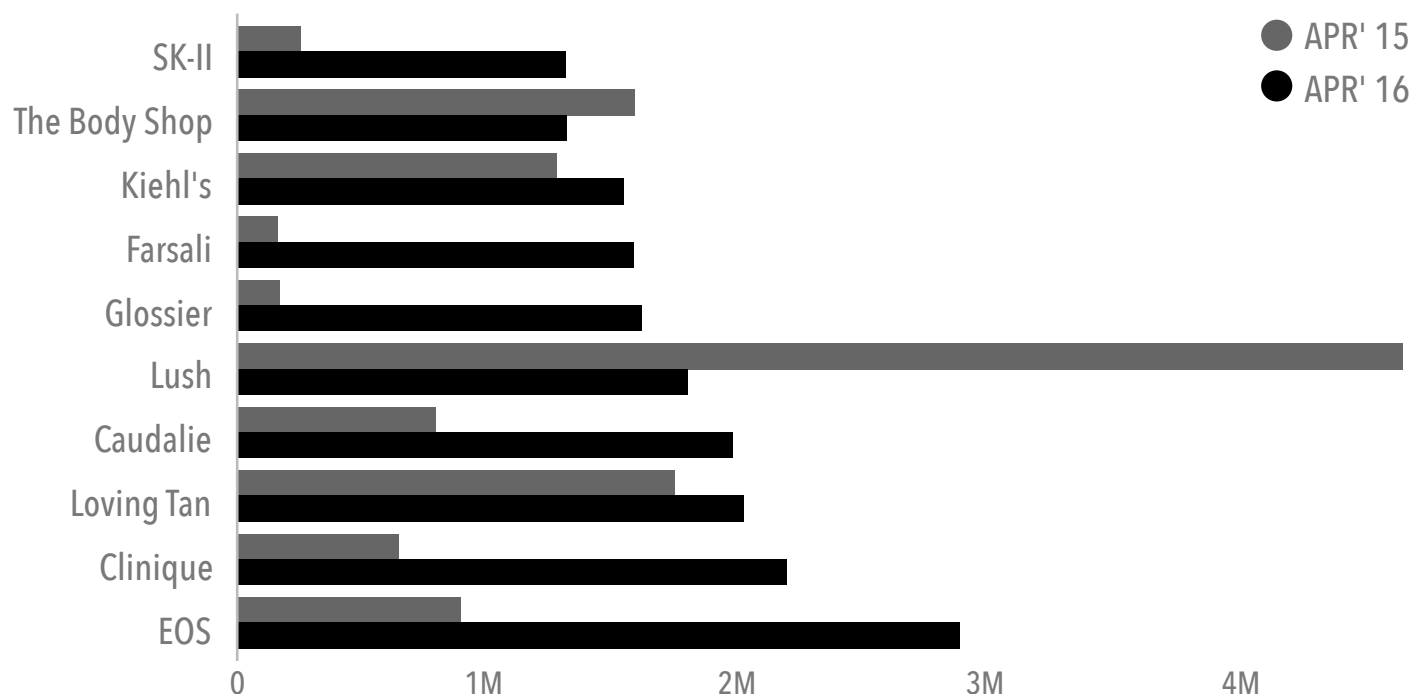
TWITTER



PINTEREST



OVERALL TRENDING EMV



Y/Y GROWTH

BRAND	APR 2015	APR 2016	Y/Y GROWTH
EOS	\$879,651	\$2,852,412	69.16%
Clinique	\$634,455	\$2,165,262	70.70%
Loving Tan	\$1,725,551	\$1,998,581	13.66%
Caudalie	\$779,360	\$1,955,043	60.14%
Lush	\$4,602,054	\$1,776,512	-159.05%
Glossier	\$163,999	\$1,595,250	89.72%
Farsali	\$155,176	\$1,562,027	90.07%
Kiehl's	\$1,256,486	\$1,521,678	17.43%
The Body Shop	\$1,564,542	\$1,297,691	-20.56%
SK-II	\$247,089	\$1,291,849	80.87%

Brand Spotlights

EOS Rises to Top with DIY Videos



EOS (Evolution of Smooth) closed April as the leading skincare brand in EMV, inspiring content creation worth \$2.9M EMV. While a significant portion of the content came from videos that focused on playful DIY crafts making use of EOS lip balms, the brand itself reached out to numerous established beauty influencers, compelling them to post content about the brand's lip balms and lotions.

In April, EOS's top EMV-generating content creators were the (non-beauty) DIY bloggers GlitterForever17 and Karina Garcia. Their posts centered on the appeal and versatility of the EOS lip balm's colorful, spherical casing, and not on the performance of EOS products as skincare items. Popular YouTuber GlitterForever17 (2.6M subscribers) filmed a high-engagement video for April Fools' Day called "DIY

Karina Garcia shows viewers how to transform an EOS lip balm into a miniature mascara, garnering 4.8M views.



Camilacoelho shares a snapshot of her EOS lip balm at Coachella, netting 49.3K likes.

Pregnant EOS Lip Balm,” in which she showed viewers how to create a pregnant, Barbie-like doll using an altered EOS lip balm as the belly. GlitterForever17 created several other quirky DIY Videos in April (e.g., “DIY Edible Nail Polish”) that did not feature the EOS brand, but included a link in their summary section to the blogger’s September 2015 “DIY Edible EOS” video. Karina Garcia (2.3M subscribers), like GlitterForever17, filmed creative -- albeit less humorous -- DIY tutorials that utilized EOS products. In “DIY EOS Mascara!,” for example, Karina showed users how to repurpose an EOS lip balm as a “tube” for holding mascara, garnering nearly 5M views.

While these popular DIY posts skewed more humorous than informative, EOS made an effort on its own behalf to engage a distinct demographic of influencers. In April, the brand sent its products to several influencers known for their classy, upscale content creation, who posted about how integral EOS products were to their daily routines. Seaofshoes dedicated a sponsored blog post describing her essentials for combating a gloomy day, which included pastries from a local bake shop, magazines, and EOS’s Visibly Soft Coconut Milk lip balm. Several beauty bloggers, including camilacoelho and ohhcouture, also posed with their pastel-hued EOS lip balms at Coachella, portraying the lip balm as a refreshing necessity for hot, dry weather. Though comments on these Instagrams tended to focus more on the influencer’s outfit or general appearance than on the featured product, the cohesive aspirational nature of these posts -- a far cry from the DIY tutorials -- gave EOS a foothold into the skincare routines of upscale beauty and lifestyle bloggers.

SK-II Makes Hero Product Grow on Trees

Prestige brand SK-II re-entered the Top 10 in April, finishing the quarter with \$1.3M EMV. Throughout the month, SK-II promoted its #MyEssence campaign with full force, celebrating both its recently launched Facial Treatment Oil and the cult-status Facial Treatment Essence. Towards the end of April, the brand invited longtime fan and brand partner Gucci Westman to head up a #MyEssence event, where the renowned makeup artist shared expert skincare advice to the influencers and beauty insiders in attendance.

The #MyEssence event was not only informative -- attendees like influencer weworewhat (1.5M Instagram followers) thanked Westman for “so many new skincare tips” on Instagram and Twitter -- but provided eye-catching elements that compelled guests to post photos of the event, tagged #MyEssence. SK-II decorated the backdrop of the venue with floral wallpaper that matched Westman’s own wallpaper at home, emphasizing its dedication to personalization and detail. The brand also outfitted a tree with dozens of SK-II products to playfully indulge any influencer desires for SK-II to “grow on trees.” In turn, Westman showed her appreciation for SK-II by Instagramming a bottle of Facial Treatment Essence that the brand had engraved with her name, in honor of the makeup artist’s #MyEssence appearance.

SK-II fueled even more content around the #MyEssence hashtag by sending the Facial Treatment Essence to established, on-brand influencers like inthefrow and classisinternal, who posted Instagrams of the bottle and shared



how effective they thought the essence was. Inthefrow called the essence “pretty darn special,” and classisinternal attributed her skin’s “glow” to the product. These Instagrams, tagged with #MyEssence, all emanated SK-II’s aesthetic of sleek sophistication and luxury. Although their Instagrams may not have been as informative or personal as a YouTube review or tutorial, the influencers’ perpetuation of the #MyEssence hashtag brought new life to a hero product. #MyEssence garnered \$755.9K EMV, while mentions of the Facial Treatment Essence netted \$754.8K EMV.

Beautyinnewyork’s Instagram of a product-adorned tree at a #MyEssence event received 54 likes.

Kiehl's and Caudalie Rock Summer Essentials at Coachella

In April, Caudalie and Kiehl's executed separate influencer initiatives that both took place at the Coachella music festival in Indio, California. Caudalie set up shop at an invite-only, Vanity Fair-hosted retreat, where it gifted influencer attendees with products from its newly repackaged, hydration-focused Vinosource line. Influencers posted photos of themselves applying the moisturizing products, a source of refreshment in the midst of festival weather. Influencer and model rocky_barnes shared a snapshot of herself lounging on a pool floatie and spraying her face with Caudalie's Grape Water mist, thanking Caudalie for keeping her hydrated in the "desert heat." She also tagged the Instagram with #mysweetsorbet, the official hashtag associated with the Vinosource collection. Caudalie's participation in Coachella not only primed influencers to associate the brand with notions of refreshment and respite, but successfully integrated this narrative of sophisticated self-indulgence into a more youthful and trendy scene. Mentions of the #mysweetsorbet hashtag inspired a total of \$116.6K EMV.

Kiehl's took its Coachella-centered influencer engagement one stage further, flying out British influencers fleurdeforce, samanthamariaofficial, and viviannamakeup to experience the world-famous festival. The brand treated the trio to a rustic retreat at Sparrows Lodge in Palm Springs,



outfitting the space with photo-worthy props like an old-school motorcycle, a neon Kiehl's sign, and other barn-inspired pieces. Each influencer took over Kiehl's' Instagram for one day of the festival, sharing her favorite Kiehl's products and directing her followers to keep up with their #kiehlsrocks concert experience on the brand's Instagram. By granting the influencers creative control of the brand's Instagram, Kiehl's elevated their product choices as the premier guide to music festival preparedness. Everyday users were also encouraged to post their own #kiehlsrocks-tagged Instagrams, which Kiehl's then reposted on its owned website.

Rocky_barnes kicks back with Caudalie's Grape Water product at Coachella, netting 13.2K likes.