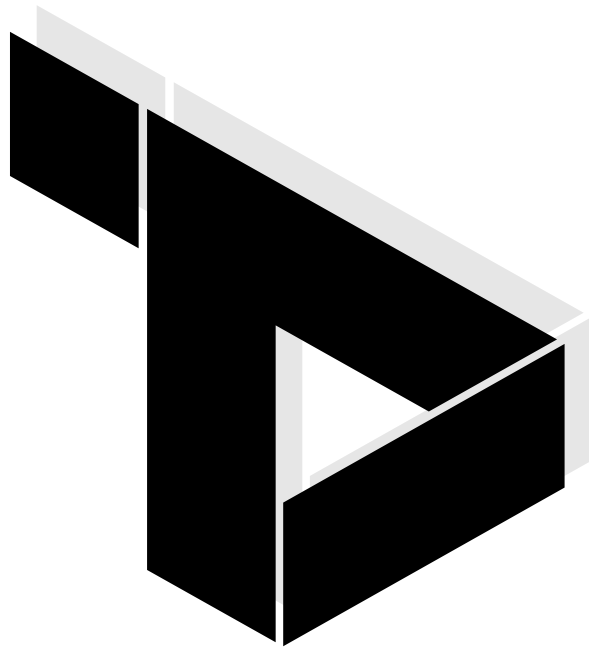


LA MODE JUNE

SKINCARE EDITION 2016



ANALYSIS BY
CHRISTINA VASILIOU, MERISSA REN, KIM HUYNH & GRACE CHAO

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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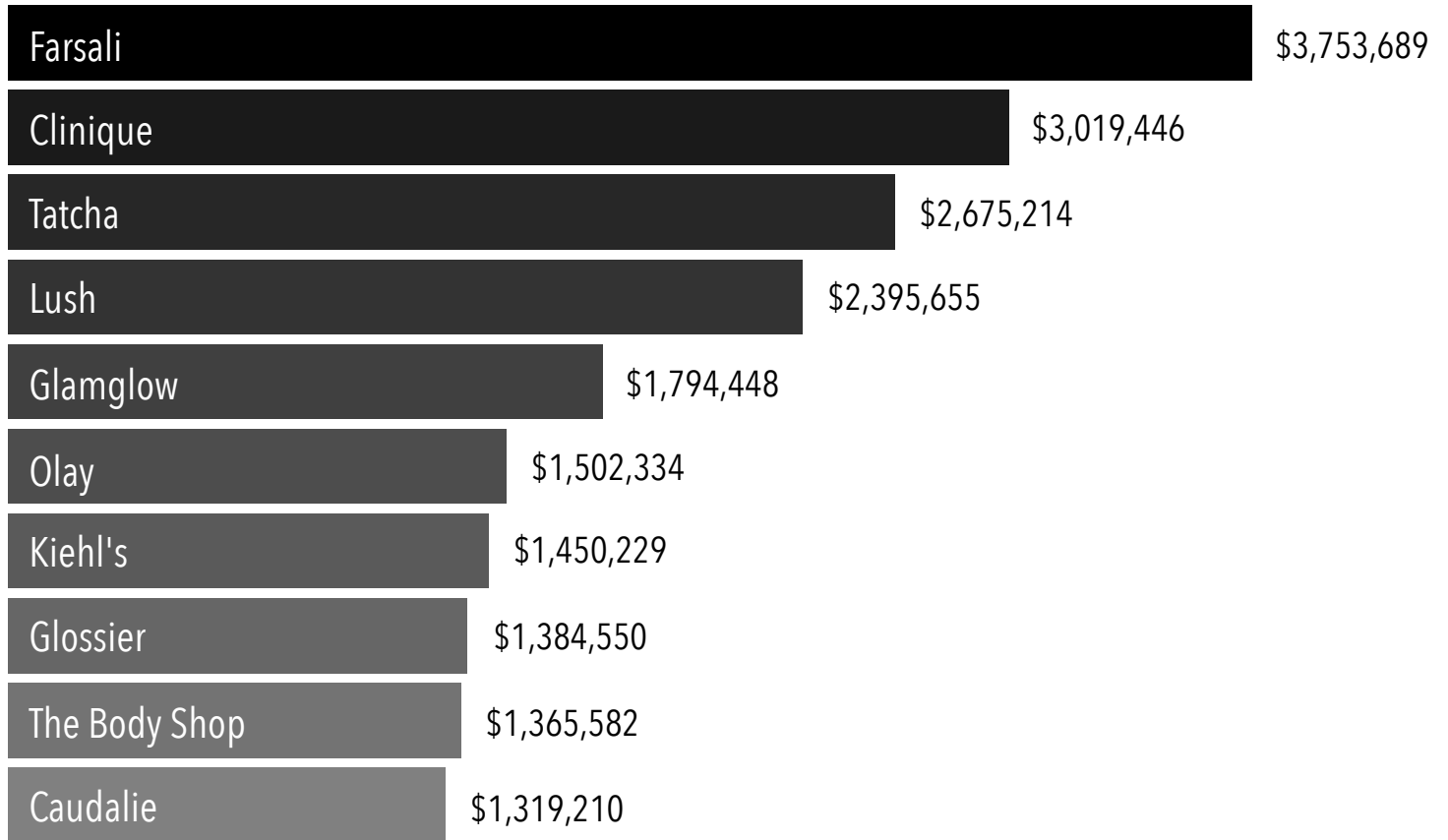
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THE TOP 10

Earned Media Value Leaderboard

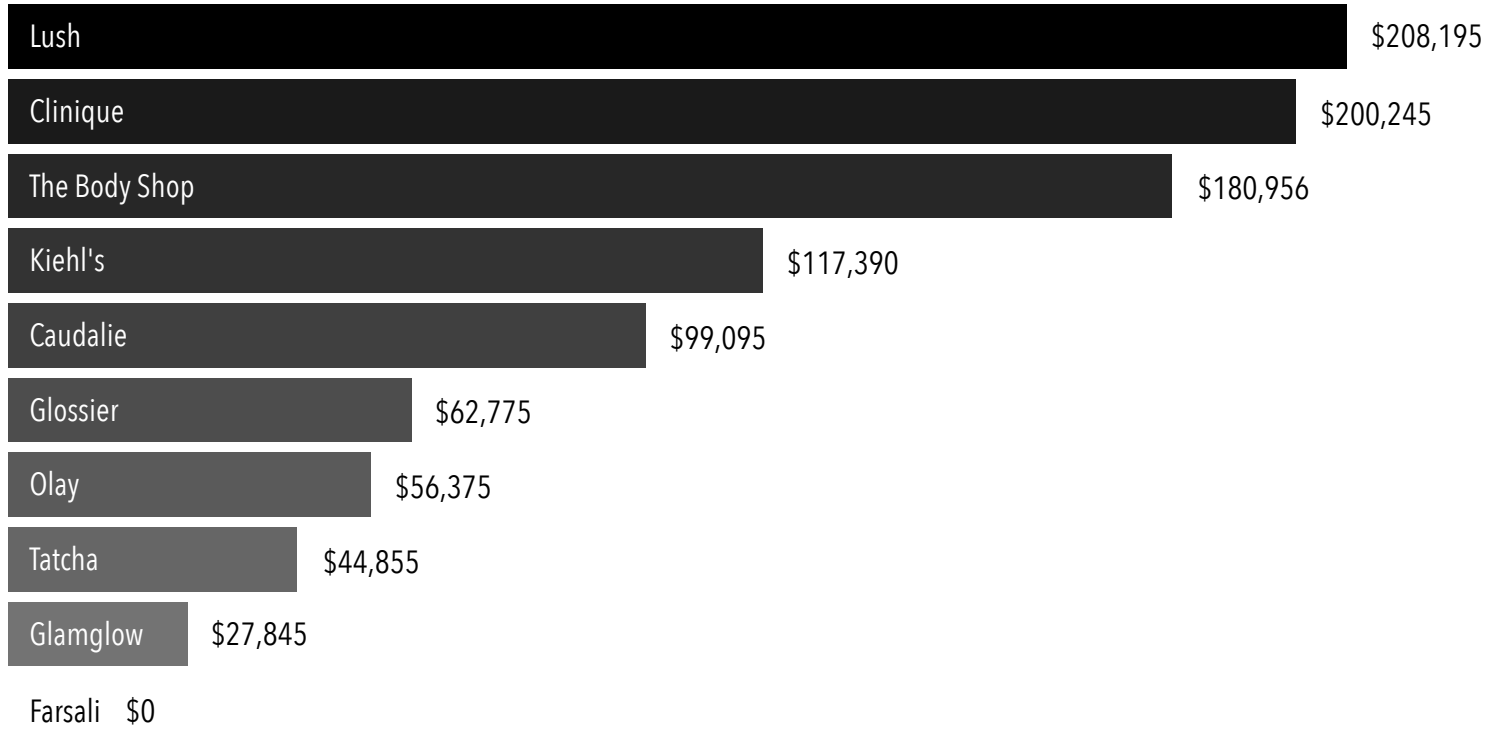
Top 10 Brands by EMV



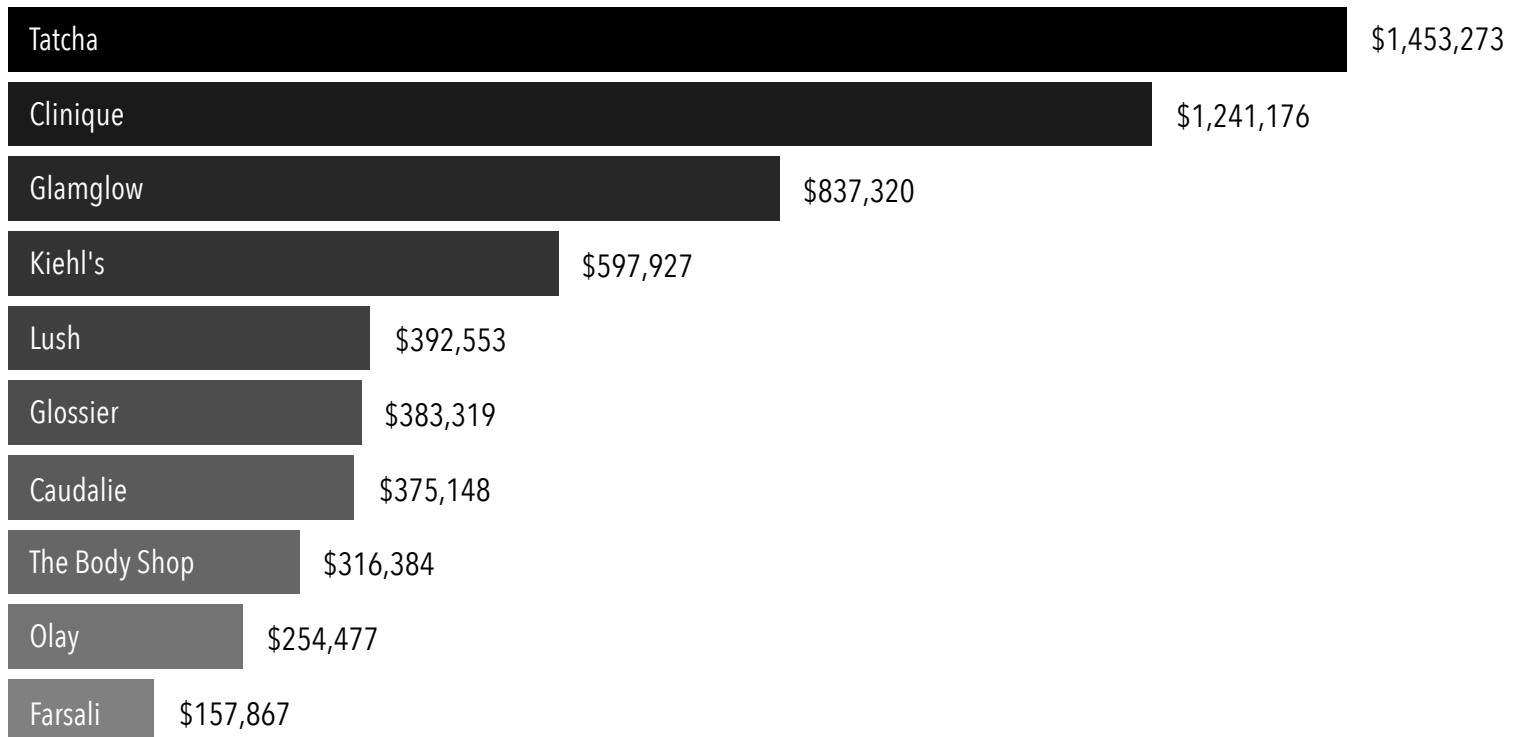
THE TOP 10

Earned
Media
Performance
By Channel

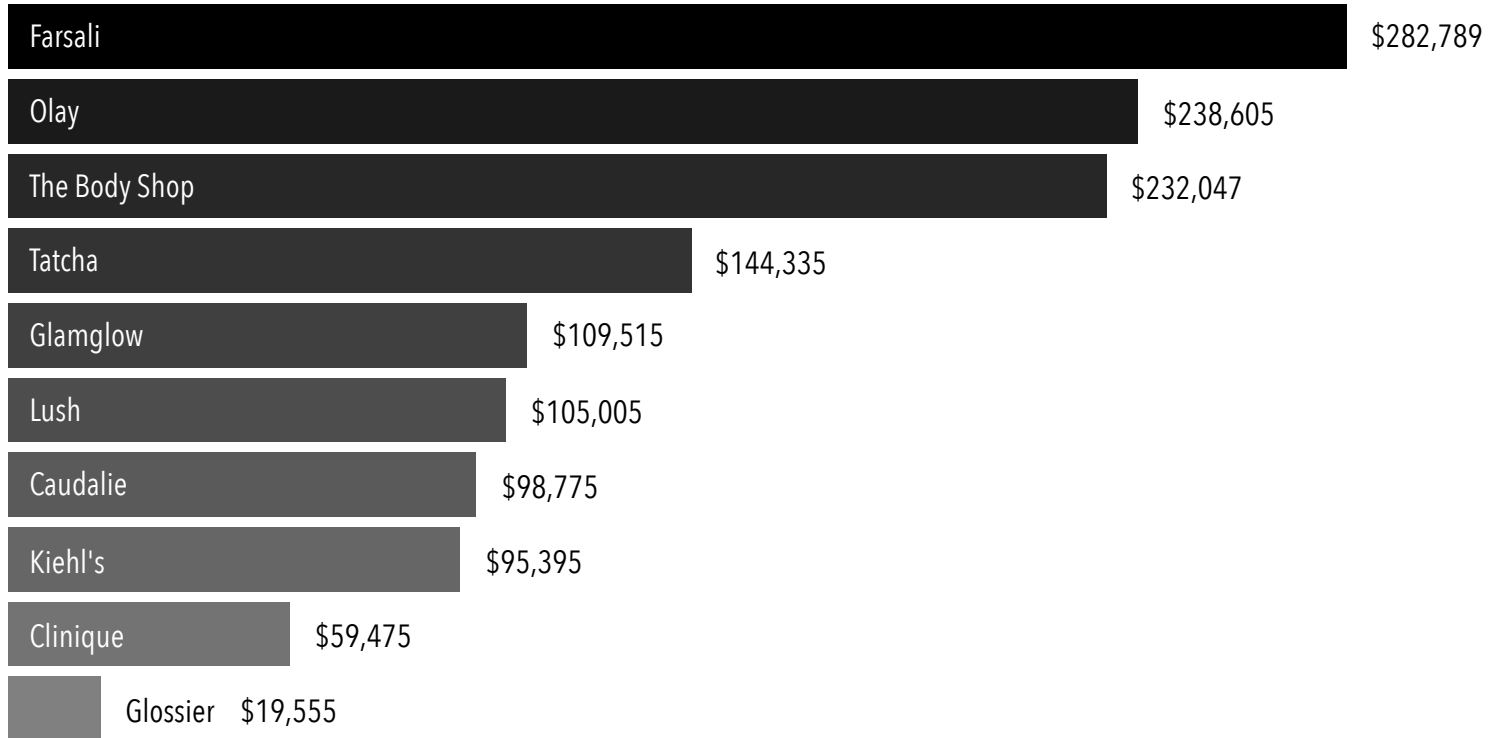
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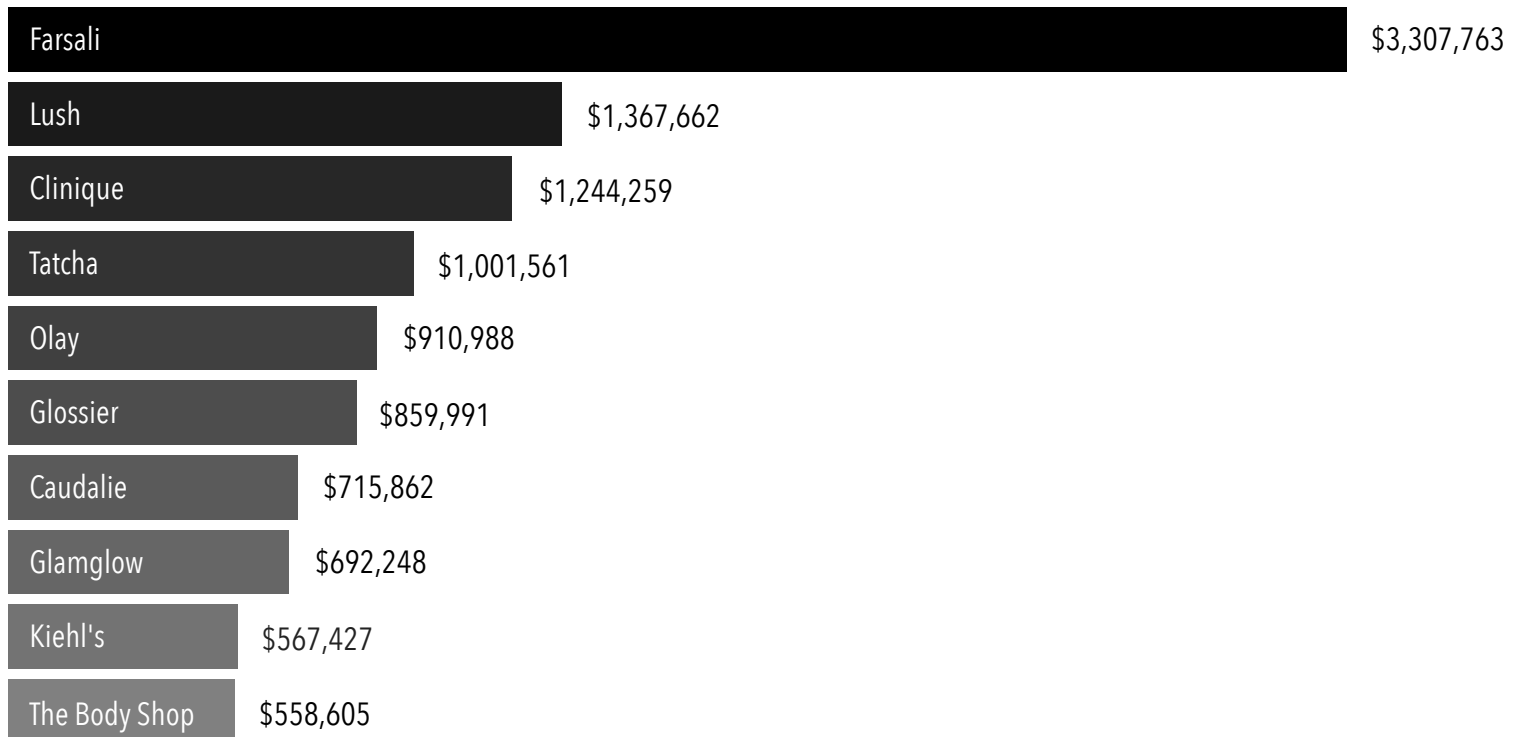
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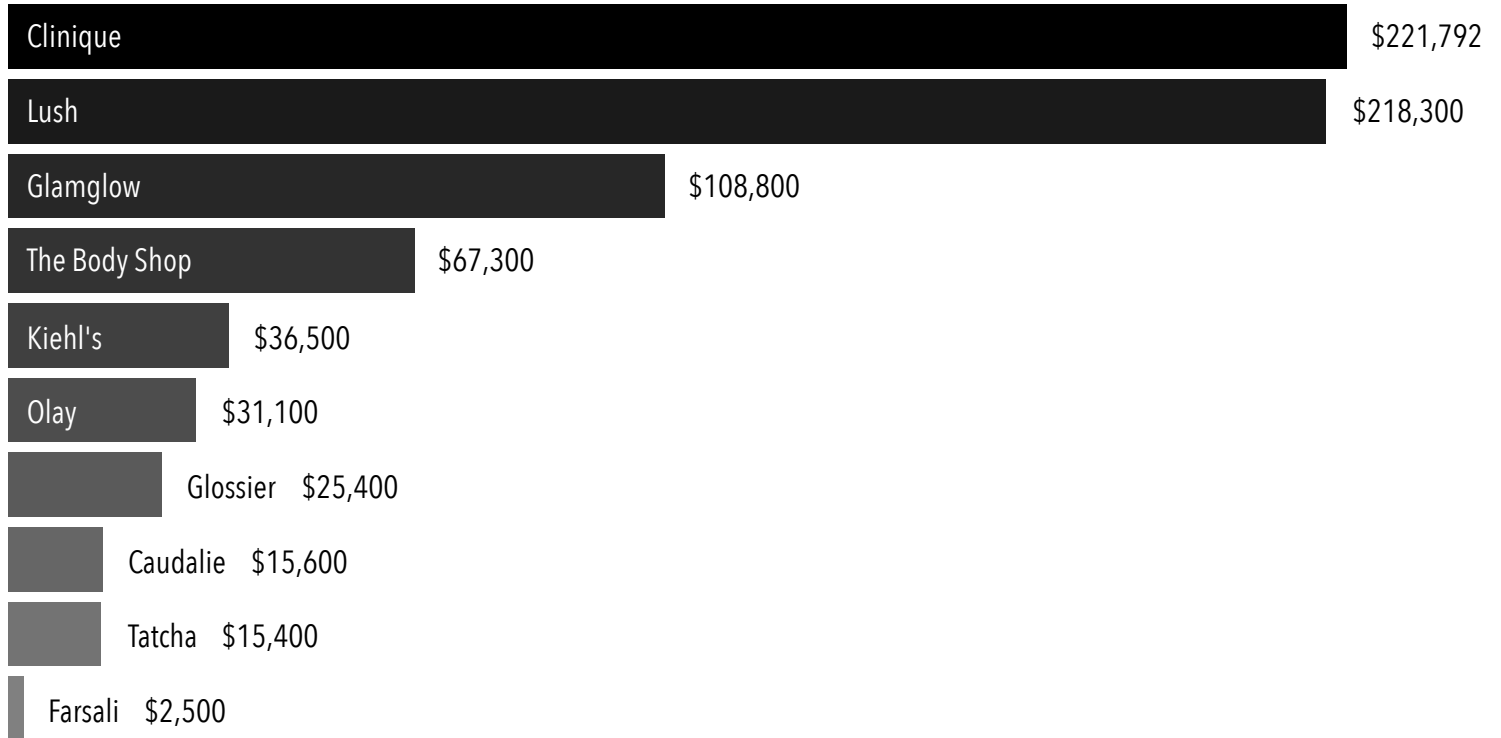
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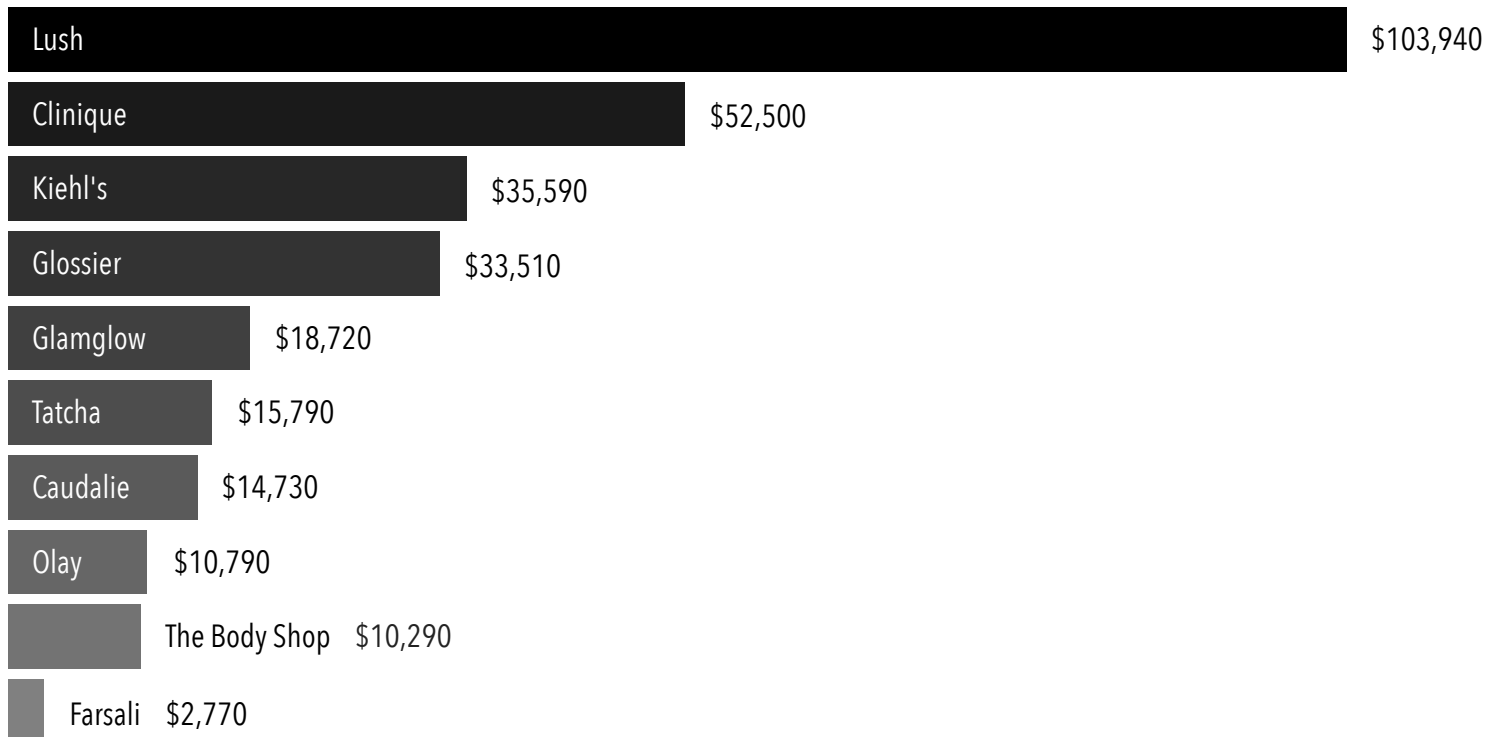
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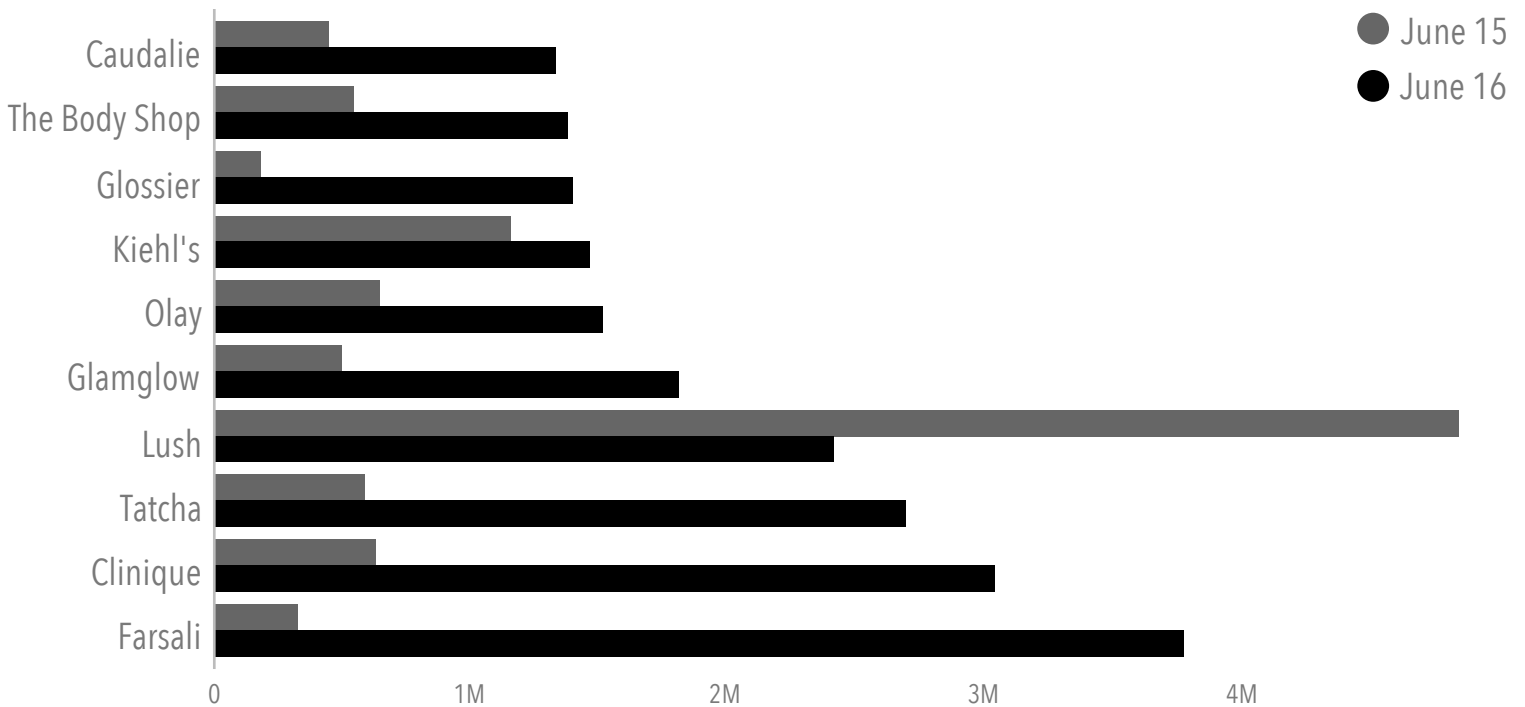
TWITTER



PINTEREST



OVERALL TRENDING EMV



Y/Y GROWTH

BRAND	JUNE 2015	JUNE 2016	Y/Y GROWTH
Farsali	\$318,636	\$3,753,689	1,078.05%
Clinique	\$620,029	\$3,019,446	386.98%
Tatcha	\$577,761	\$2,675,214	363.03%
Lush	\$4,820,559	\$2,395,655	-50.30%
Glamglow	\$489,039	\$1,794,448	266.93%
Olay	\$634,688	\$1,502,334	136.70%
Kiehl's	\$1,143,588	\$1,450,229	26.81%
Glossier	\$176,665	\$1,384,550	683.71%
The Body Shop	\$534,252	\$1,365,582	155.61%
Caudalie	\$438,501	\$1,319,210	200.85%

Brand Spotlights

Glamglow Mobilizes Influencers with Hero Product



Grav3yardgirl shows off her Sonic Blue mask, netting 91.6K likes.

In celebration of Sega's 25th anniversary of Sonic the Hedgehog, its most popular character, Sega and Glamglow designed a limited-edition, Pantone Sonic Blue version of Glamglow's GravityMud Firming Treatment mask. Though the brand produced 1,000 units that were distributed to influencers in April, much of the associated content was created in June.

Influencers, including grav3yardgirl and jeffreestar, reminisced about playing the video game growing up and praised the product in their respective monthly "favorites" videos, netting a combined \$373.1K EMV. Grav3yardgirl posted an Instagram selfie wearing the blue mask, captioning it, "Trying out [the] new GravityMud Sonic the Hedgehog edition and I'm in love!" The beauty vlogger, who had extensively reviewed the original silver GravityMud mask in a January "first impressions" video, also raved about the same product in her February "favorites" video, stating that it had improved her skin with each use, and that she would "100% be repurchasing." The consistency with which she featured and recommended the mask solidified the authenticity of her endorsement.



Jeffreestar posted a 12-minute review and demonstration video with best friend Manny Mua and boyfriend Nathan Schwandt. The three donned matching Versace robes and playfully tested both the silver and blue GravityMud masks, praising everything about the product, from packaging to consistency. Jeffreestar hinted that he would love to work with Glamglow, telling his followers: “If you want to see me do a collab with Glamglow and have it be pink metallics, just send them an email...wink, wink.” The brand

responded by reposting the video multiple times to its own social channels and sending the influencer a care package to demonstrate its appreciation. This interaction between jeffreestar and Glamglow demonstrated the brand’s commitment to fostering organic relationships with its “family” of influencers. As a result of successfully engaging top influencers with its limited-edition Sonic Blue release, Glamglow achieved a 267% year-over-year growth and entered June’s top 10 EMV-driving skincare brands.

Jeffreestar (middle) poses with boyfriend Nathan Schwandt (left) and best friend Manny Mua (right) in matching masks, garnering 2.0M views.

Caudalie and Olay Leverage Organic and Sponsored Content

Both Caudalie and Olay entered the top 10 EMV-driving skincare brands in June by engaging their influencer communities. Caudalie sparked a conversation around the hashtag #vinoperfect by sending the full Vinoperfect collection to a handful of influencers, including lovelypepa, amberfillerup, and songofstyle. Notably, the brand chose to engage lifestyle and fashion influencers, rather than exclusively beauty-focused bloggers. In particular, songofstyle, a longtime user of Caudalie, created posts that came across as authentic and consistent with her personal aesthetic, including the Vinoperfect products among her vacation essentials. In contrast, because lovelypepa and amberfillerup do not regularly post about Caudalie products, their posts may have appeared more like traditional advertisements to their community. Lovelypepa's Instagram video of her daily facial routine was shot like a scripted commercial and included the hashtag #ad. Similarly, amberfillerup's Instagram photo was a staged glamour shot of herself, which felt only tangentially relevant to the Vinoperfect collection. These #vinoperfect posts, a mixture of organic and sponsored content, drove \$283.4K EMV.

Olay hosted an intimate event with a handful of influencers to celebrate the launch of its new Regenerist Micro-Sculpting Cream Moisturizer with SPF 30. The brand invited beauty guru nicoleguerriero and fashion influencer vivaluxuryblog on a sailing trip



around Marina del Rey, California. In addition to sharing about the summery event on Instagram, both influencers posted two additional photos featuring the product: a close-up photo of the product itself, and a shot of themselves holding the product while applying the cream to their faces. Though nicoleguerriero's and vivaluxuryblog's posts earned a combined \$655.5K EMV, Olay's relationships to its paid partners continue to follow the traditional brand-spokesperson model. Because both influencers' posts were tagged #ad and similarly staged, their Regenerist-related content creation may have read as less authentic and more transactional.

Songofstyle shares her travel essentials, driving 35.9K likes.