







## Special Report Q3 2016








# Introduction to Earned Media Value (EMV)

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 perceived value of digital word-of-mouth to brands within the industry. EMV serves as a way to allow for benchmarking across marketing activities and across brands.








## Posts From

-  Influencers
-  Brands
-  Retailers
-  Publications

## On Platforms Including

-  Blogs
-  Instagram
-  YouTube
-  Facebook
-  Pinterest
-  Twitter
-  Websites

## Measuring Engagement

-  Comments
-  Tweets/Retweets
-  Favorites
-  Likes
-  Pins/Repins
-  Shares
-  Video Views

# Makeup to ‘Ride or Die’ for

If there’s one phenomenon that embodies the notion of community within beauty’s social media landscape, it’s the YouTube challenge tag. Whether it’s boyfriends doing makeup, or giving yourself a good scare with a highlighter-only look, YouTube tag challenges take the beauty community by storm, as sources of both entertainment and inspiration. In Q3, the “Ride or Die Makeup Tag” caught our eye—for its unique insight into what the makeup community considers really good beauty products.

The “Ride or Die” tag was the brainchild of superstar beauty vlogger Jaclyn Hill (3.7M YouTube subscribers), who threw down the gauntlet in August: if you could take only one product from each makeup category to a desert island—to “ride it out” with you—what would you choose? After naming her “ride or die” picks in 16 categories, including Urban Decay’s Naked Skin Concealer and the

Giorgio Armani Luminous Silk Powder, Jaclyn challenged her blogger friends and subscribers to do the same.

With YouTube influencers constantly gifted new makeup to test and review, would “hero” products like NARS Blush in “Orgasm” stand the test of time, or would an indie newcomer take the cake? Would prestige names like MAC and Anastasia Beverly Hills continue to dominate, or would a drugstore brand emerge the victor? For this article, we watched the 15\* most-viewed “Ride or Die Makeup Tag” videos by English-speaking bloggers, six of whom were tagged by Jaclyn to take on the challenge (her initial post remains the most-viewed video, with over 2M views.) We then compared their selections across 11 common categories. That makes for over 150\*\* picks by influential, established bloggers ranging from KathleenLights (2.7M subscribers) to Wayne Goss (2.8M subscribers). Here’s what we learned:

*If you could take only one product from each makeup category to a desert island—to “ride it out” with you—what would you choose?*

—Jaclyn Hill



Jaclyn Hill via Youtube  
2.1M Views | 72.4K Likes



## Top Brands by Total Mentions (across 11 categories)

BRAND	COUNT	MASS/PRESTIGE
MAC	13	Prestige
Too Faced	10	Prestige
Benefit	8	Prestige
NARS	8	Prestige
Tarte	8	Prestige
Becca	6	Prestige
Laura Mercier	6	Prestige
Anastasia Beverly Hills	5	Prestige
Maybelline	5	Mass
Charlotte Tilbury	4	Prestige
CoverGirl	4	Mass
Kat Von D	4	Prestige
L'Oréal Paris	4	Mass
Makeup Geek	4	Mass
Make Up For Ever	4	Prestige
Urban Decay	4	Prestige

## I. While prestige brands proved more popular, mass brands got stage time, too.

55 unique brands were represented in our “Ride or Die” data collection. Of the 16 brands whose products were most frequently deemed “ride or die,” 12 were prestige (higher-end): MAC came in first with 13 mentions, followed by Too Faced with 10. Four mass brands—Maybelline, CoverGirl, L’Oréal Paris, and Makeup Geek—made the top 16, tying with five prestige brands at either five or four mentions each. That’s a noteworthy achievement, considering that prominent YouTubers easily have the means to purchase or receive higher-end makeup products.

Multiple brands had more than one product listed within the same “Ride or Die” category. Of the 11 categories, four had ties for brand “leader”—the brand with the highest total number of mentions within a category—making for a total of 15 category leaders. Of these 15, 12 were prestige brands, while three were mass. Standouts include Laura Mercier, whose Translucent Loose Setting Powder was included in five ride-or-die roundups, and MAC, whose iconic Lipstick, in the shades “Myth” and “Velvet Teddy,” also made five Ride or Die lists.



## II. Top “Ride or Die” products weren’t necessarily classics.

In line with what we expected, some iconic products, like the NARS Blush, took first place in their respective categories (two influencers chose the shade “Madly,” while “Orgasm” and “Exhibit A” got one vote each). But in other categories, drugstore products, as well as newer finds, were favored as ride-or-dies. Maybelline’s Instant Age Rewind Concealer was the top choice for concealer, while the second-place pick, Tarte’s Shape Tape Contour Concealer, launched in June 2016, just two months before the challenge commenced.

Influencer-created products also had the chance to shine. Jeffree Star’s Velour Liquid Lipstick tied with Kat Von D’s Everlasting Liquid Lipstick for top liquid lipstick, and while Jaclyn Hill unsurprisingly named her collaboration with Becca, the Shimmering Skin Perfector in the shade “Champagne Pop,” as her ride-or-die highlighter, two other bloggers, Amy Macedo and Melissa Alatorre, agreed. The ride-or-die popularity of these partner products reinforced the power of the influencer collaboration: an established influencer’s thriving network of influencers and followers provides a built-in fan base for their creative business ventures.

### Top Brand and Product per Category

CATEGORY	TOP BRANDS	TOTAL COUNT	TOP PRODUCTS (VOTES)
Primer	Too Faced	3	Too Faced Hangover Primer (3)
Foundation	Make Up For Ever	3	Make Up For Ever Ultra HD Stick (2); Revlon Colorstay Foundation (2)
Concealer	Maybelline	3	Maybelline Instant Age Rewind Concealer (3)
Face Powder	Laura Mercier	5	Laura Mercier Translucent Loose Setting Powder (5)
Blush	NARS	4	NARS Blush (4)
Bronzer	Benefit; MAC	3 each	Benefit Hoola Bronzer (2); MAC Mineralize SkinFinish Powder (2)
Highlight	Anastasia Beverly Hills; Becca	3 each	Becca Shimmering Skin Perfector (3)
Mascara	Benefit; L'Oréal Paris	3 each	Benefit Roller Lash Mascara (2); L'Oréal Paris Voluminous Carbon Black Mascara (2); CoverGirl Lashblast Mascara (2)
Lipstick	MAC	5	Lipstick (5)
Liquid Lipstick	Jeffree Star; Kat Von D	2 each	Jeffree Star Velour Liquid Lipstick (2); Kat Von D Everlasting Liquid Lipstick (2)
Eyeshadow	Makeup Geek	4	Makeup Geek Eyeshadows (3)

### III. Top brands represented in the “Ride or Die” roundups were also widely talked about—at large.

To test whether the popularity of leading “Ride or Die” brands extended beyond the challenge, we looked to EMV, Tribe Dynamics’ metric for social media engagement. Eight of the top 16 Ride or Die brands also ranked in the top 10 EMV-generating beauty brands for Q3 (July through September of 2016), suggesting that brands with a highly respected product likely boast other hit products, too, and benefit from influencer loyalty in general. (To give some perspective, a single “top” YouTube video can drive about \$150K EMV. The average amount of overall EMV driven by a top-10 brand in Q3 was \$118.8M EMV.) The brands mentioned most frequently in top “Ride or Die” lists weren’t, by any means, isolated mentions; their products are talked about on social media all the time.



### IV. Top “Ride or Die” products proved their worth in EMV, too.

We looked at Q3 EMV figures for Ride or Die products that received at least three mentions—or, given our sample set of 15 influencers, at least 20% of their respective category’s votes. None of these products drove less than \$3.0M EMV, while more than half drove over \$10.0M each. We also checked out the EMV for Tarte’s Shape Tape concealer, which received two votes and was the youngest product to make a Ride or Die list. Shape Tape’s whopping \$19.6M EMV in Q3 warranted its instant “holy-grail” adoption by influencers.

Although we only considered videos from top-tier influencers for this analysis, dozens—even hundreds—of “Ride or Die” videos have been uploaded since the original challenge, by established and aspiring influencers alike. If there’s one thing we can conclude about these 15 most-viewed videos, however, it’s that they’re more than a source of entertainment: their ride-or-die picks—from MAC lipsticks to Maybelline’s concealers—give real insight into what’s tried-and-true in the beauty world at large.

\*We looked at the 15 most-viewed “Ride or Die” videos as of Sept. 15, 2016, one month from the tag’s start date (Aug. 16, 2016).

\*\*We compared 152 product picks, to be exact. Not all of the 15 YouTubers adhered to Hill’s 16 makeup categories, so we surveyed ride-or-die selections across the 11 most common categories.

**TOP 16 RIDE OR DIE BRANDS**

MAC  
Too Faced  
Benefit  
NARS  
Tarte  
Becca  
Laura Mercier  
**Anastasia Beverly Hills**  
**Maybelline**  
Charlotte Tilbury  
CoverGirl  
Kat Von D  
L'Oréal Paris  
Makeup Geek  
**Make Up For Ever**  
**Urban Decay**

**TOP 10 EMV BRANDS FOR Q3 2016**

**Anastasia Beverly Hills**  
**MAC**  
**Benefit**  
**Tarte**  
**Urban Decay**  
**Too Faced**  
NYX  
Morphe  
**Make Up For Ever**  
**Maybelline**

**Top 'Ride or Die' Brands vs. Top EMV-Generating Brands**

<b>PRODUCT (VOTES)</b>	<b>Q3 2016 EMV</b>
Too Faced Hangover Primer (3)	\$3,079,373
Maybelline Instant Age Rewind Concealer (3)	\$3,190,755
Laura Mercier Translucent Loose Setting Powder (5)	\$12,245,553
NARS Blush (4)	\$5,913,279
MAC Lipstick (5)	\$19,933,947
Becca Shimmering Skin Perfector (3)	\$17,399,744
Makeup Geek Eyeshadows (3)	\$19,502,482