

LA MODE MONTHLY

TRIBE DYNAMICS

SEPTEMBER 2014

SKINCARE EDITION

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DESIGN: JORDYN ALVIDREZ



EMV

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.

This is the next installment in our monthly series of reports that will provide a larger picture understanding of trends within the beauty and fashion industries that will help you build effective influencer marketing strategies and boost your brand's ROI.

Utilizing Tribe's proprietary data analytics, we will track which brands and products are creating the most valuable earned media over time, clearly out-performing the competition on a variety of social channels.

The data for this study was collected by Tribe Dynamics and is based upon the top 50,000 influencers in the beauty, fashion, and lifestyle spaces. The brands and products included in each month's study will be those that are most popular based on publicly-available information of these brand's annual revenue, and reviews from consumers and third party retailers.

DOWNLOAD REPORTS AT [TRIBEDYNAMICS.COM/INSIGHTS](https://tribedynamics.com/insights)

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THE TOP 10

EARNED MEDIA VALUE LEADER BOARD

For the month of
September, the following
10 Skincare brands
were the most socially
influential, generating the
most valuable earned
media. This metric is
based upon the following
calculations:

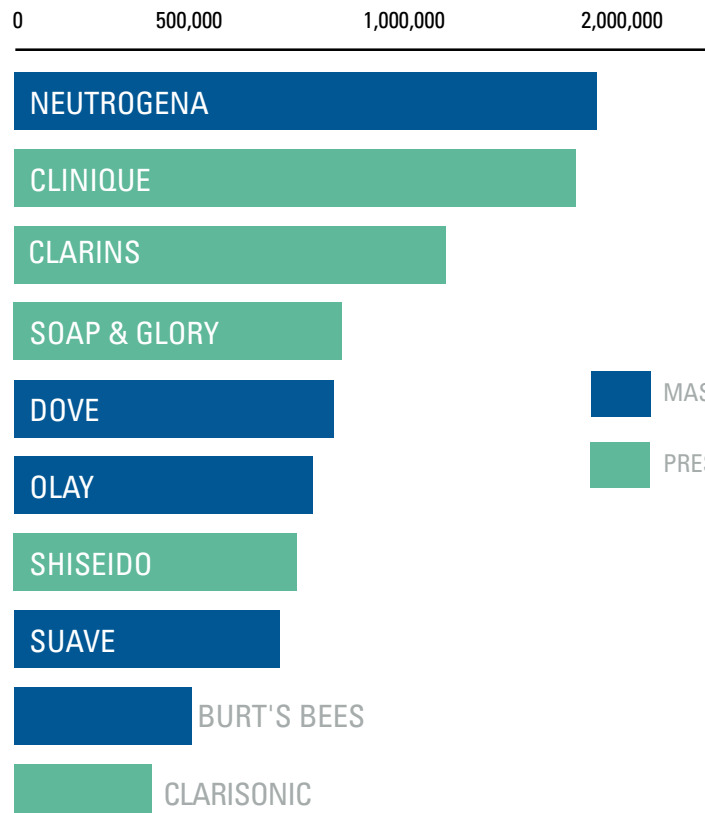
THE TOP 10 - EARNED MEDIA VALUE LEADER BOARD

THE NUMBER OF POSTS:

Blog posts
YouTube Videos
Tweets
Facebook posts
Instagram posts
Pinterest Posts

ENGAGEMENT RATE BY:

Blog views
Video content views
Twitter actions
Facebook likes, comments, shares
Instagram likes and comments
Pinterest likes, comments, shares



1. NEUTROGENA
\$1,721,930.45 EMV

2. CLINIQUE
\$1,517,817.65 EMV

3. CLARINS
\$1,055,026.55 EMV

4. SOAP & GLORY
\$788,326.50 EMV

5. DOVE
\$752,001.70 EMV

6. OLAY
\$720,125.30 EMV

7. SHISEIDO
\$713,251.50 EMV

8. SUAVE
\$669,834.55 EMV

9. BURT'S BEES
\$509,467.10 EMV

10. CLARISONIC
\$427,926.00 EMV

MASS MARKET	PRESTIGE
\$4,373,359.10	\$4,502,348.20
	+2.95%

TAKEAWAYS

Mass market and prestige brands were equally represented in September's Top 10 in Skincare, spanning a variety of skincare needs, products, and partnering third party retailers. With almost a perfect split in EMV between the two market segments, the percent difference between the mass market and prestige brands' respective combined EMV was only 2.95%. At least at a macro level, neither market segment seems to be significantly outperforming the other in digital innovation and strategy.

THE TOP 10

**EARNED MEDIA VALUE
PERFORMANCE BY CHANNEL**

The following data
reflects the approximate
value of the content
created about each brand
by social channel during
the month of September,
as measured by Earned
Media Value.

BLOG EMV

CLINIQUE

\$313,814.40

DOVE

\$303,344.20

SUAVE

\$277,754.80

NEUTROGENA

\$230,854.20

OLAY

\$190,504.80

CLARINS

\$178,709.80

BURT'S BEES

\$134,624.60

CLARISONIC

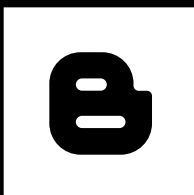
\$115,095.00

SHISEIDO

\$114,735.00

SOAP & GLORY

\$57,250.00



YOUTUBE EMV

CLINIQUE

\$671,878.25

SOAP & GLORY

\$479,470.25

CLARINS

\$469,901.75

NEUTROGENA

\$331,256.25

SHISEIDO

\$314,781.50

CLARISONIC

\$137,016.00

DOVE

\$129,872.50

BURT'S BEES

\$94,507.50

OLAY

\$92,975.50

SUAVE

\$41,534.75



TWITTER EMV

OLAY

\$79,400.00

DOVE

\$66,500.00

NEUTROGENA

\$65,700.00

SUAVE

\$60,700.00

BURT'S BEES

\$44,900.00

CLINIQUE

\$43,600.00

CLARISONIC

\$31,800.00

CLARINS

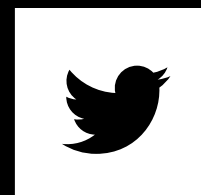
\$21,800.00

SHISEIDO

\$17,600.00

SOAP & GLORY

\$9,200.00



FACEBOOK EMV

NEUTROGENA

\$209,605.00

CLINIQUE

\$200,750.00

SUAVE

\$171,525.00

CLARINS

\$131,425.00

OLAY

\$74,925.00

DOVE

\$58,250.00

SHISEIDO

\$31,025.00

BURT'S BEES

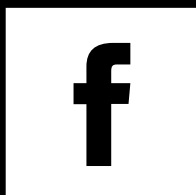
\$30,715.00

SOAP & GLORY

\$13,165.00

CLARISONIC

\$11,750.00



INSTAGRAM EMV

NEUTROGENA

\$859,315.00

OLAY

\$269,380.00

CLARINS

\$237,140.00

SHISEIDO

\$209,560.00

CLINIQUE

\$190,575.00

BURT'S BEES

\$188,030.00

SOAP & GLORY

\$161,430.00

DOVE

\$125,595.00

SUAVE

\$110,220.00

CLARISONIC

\$67,815.00



PINTEREST EMV

CLINIQUE

\$97,200.00

SOAP & GLORY

\$76,540.00

CLARISONIC

\$66,070.00

SHISEIDO

\$25,550.00

NEUTROGENA

\$25,200.00

DOVE

\$23,800.00

BURT'S BEES

\$16,690.00

CLARINS

\$16,050.00

OLAY

\$12,940.00

SUAVE

\$8,100.00



THE TOP 10

**EARNED MEDIA PERFORMANCE
BY CHANNEL:**

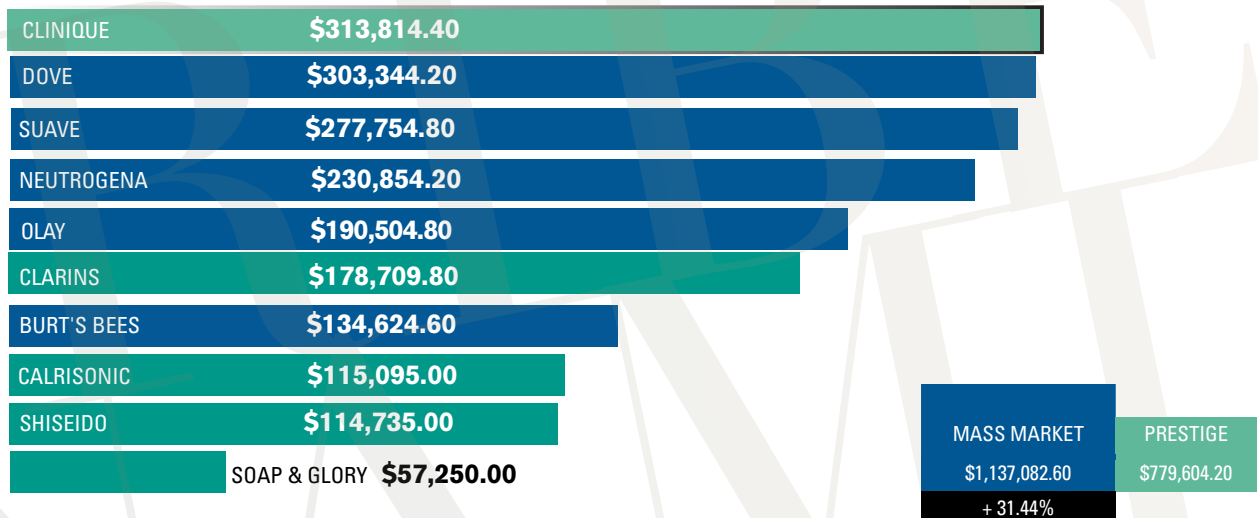
MASS MARKET VS PRESTIGE

The following data
highlights the comparative
EMV performance of
September's Top 10
Skincare brands overall
and by channel.

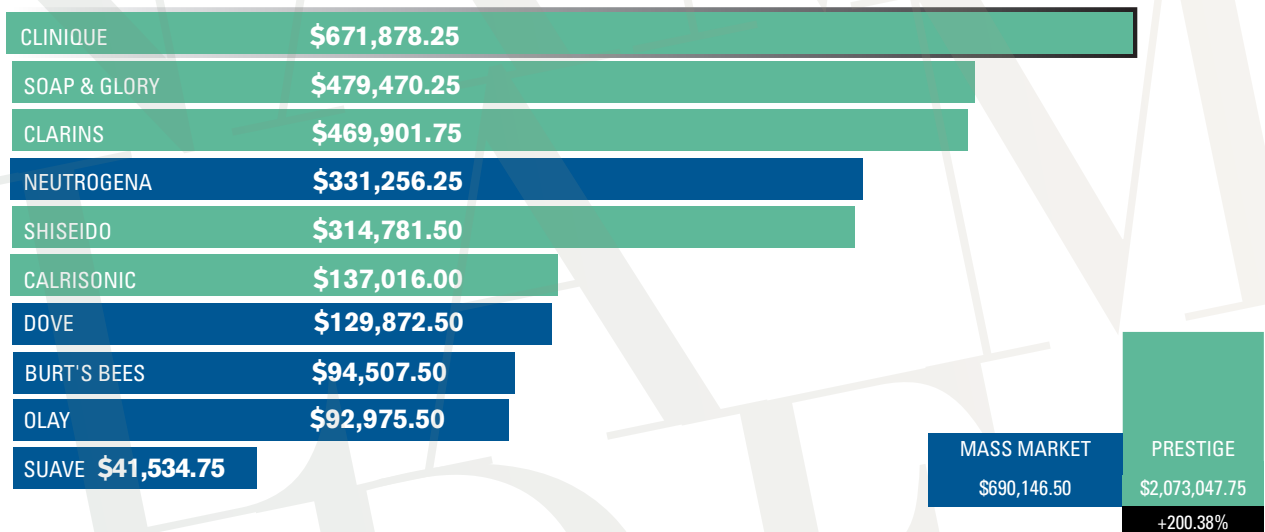
THE TOP 10 - EMV BY SOCIAL CHANNEL



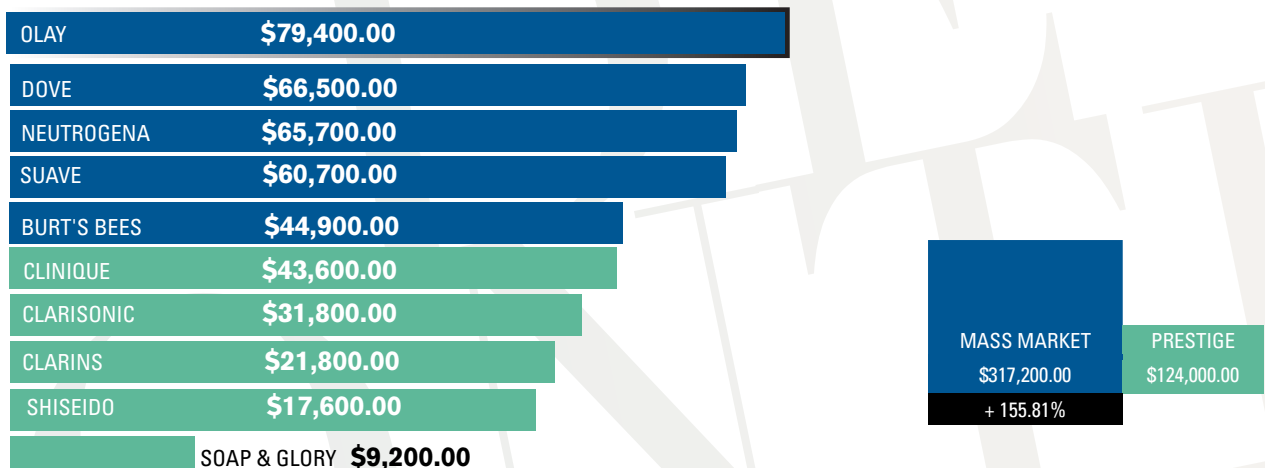
BLOG



YOUTUBE

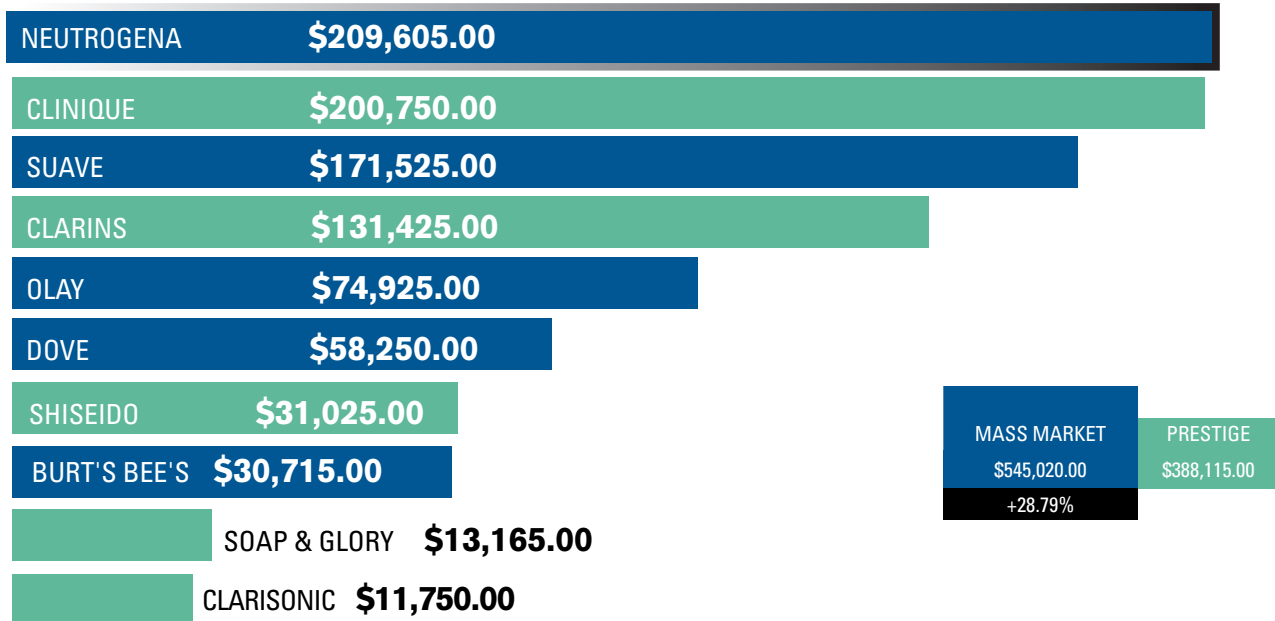


TWITTER

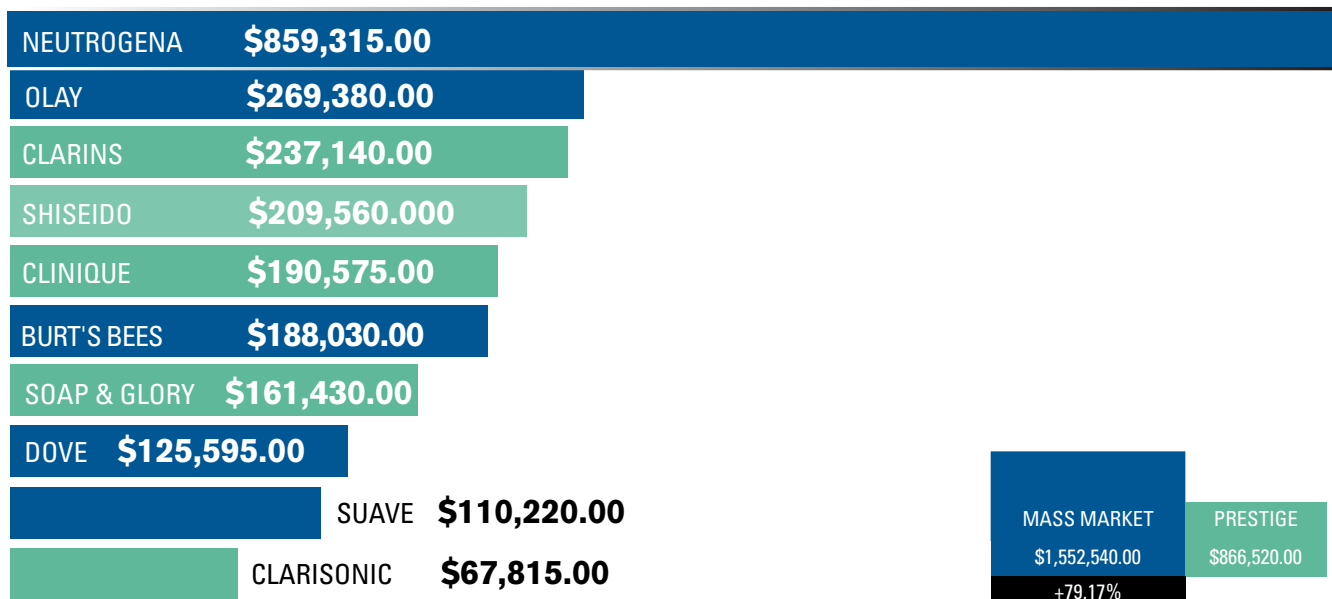


THE TOP 10 - EMV BY SOCIAL CHANNEL

FACEBOOK

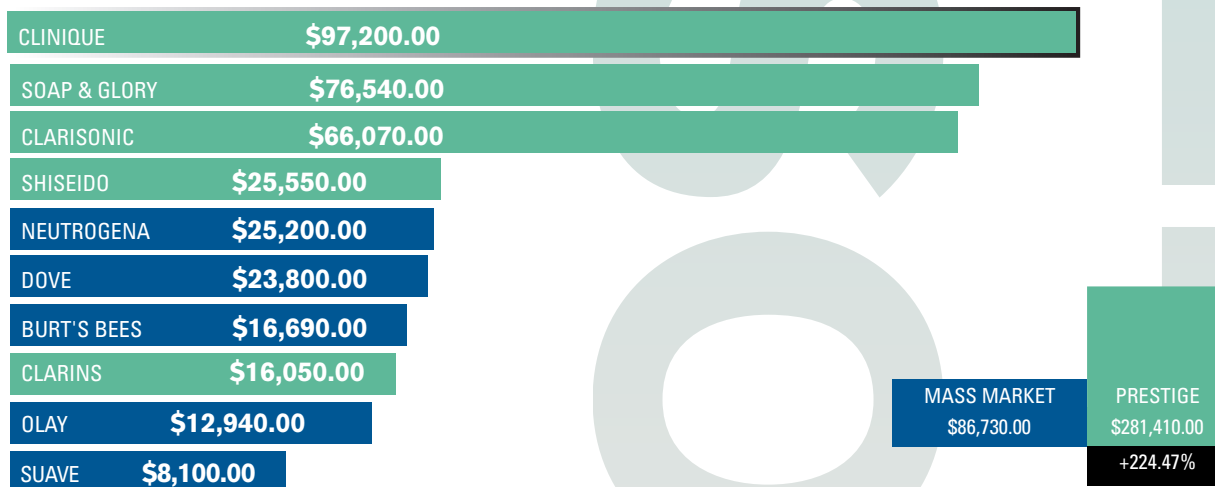


INSTAGRAM



THE TOP 10 - EMV BY SOCIAL CHANNEL

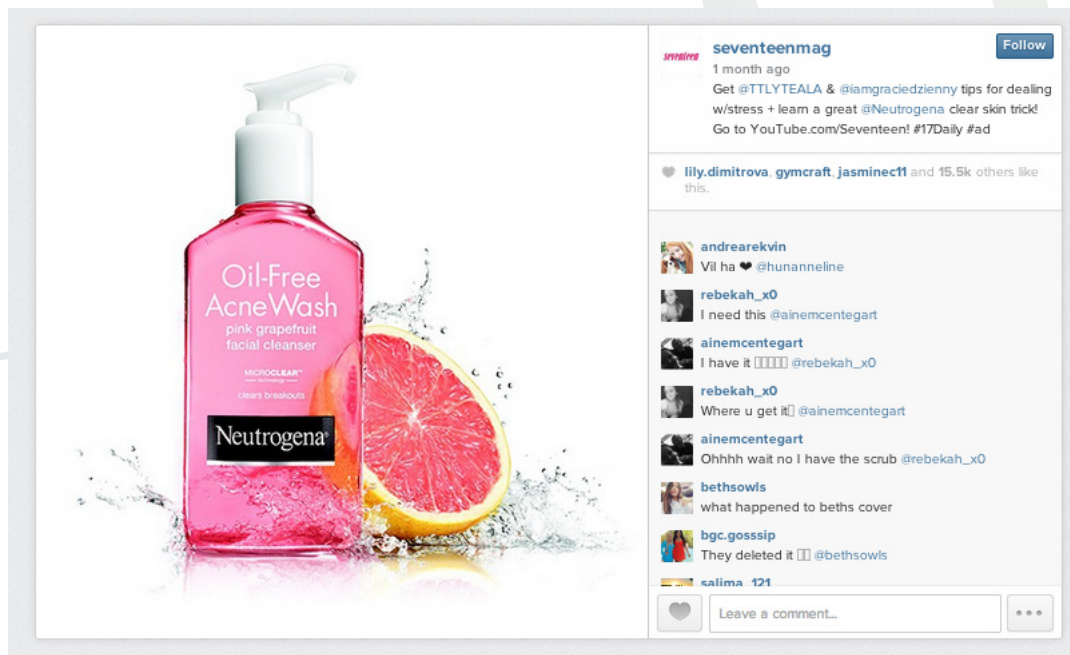
PINTEREST



TAKEAWAYS

Taking a deeper dive into EMV breakdown by channel, a few noteworthy patterns appear for both market segment from a strategy perspective. Mass market brands inspired greater level of content creation on four of the six channels monitored: Blogs, Facebook, Instagram, and Twitter. Mass market brands outperformed prestige brands most notably on Twitter, with a 155.81% difference in EMV. Meanwhile, prestige brands far outstripped mass market on both YouTube and Pinterest, generating respectively 200.38% and 224.47% more EMV.

At the brand level, number one seed Neutrogena excelled on Instagram. The brand benefited from a series of high-engagement posts published by Seventeen Magazine in celebration of the brand's celebrity ambassador, teen actor Bella Thorne. Top performing prestige brand Clinique, dominated YouTube, appearing in a variety of "monthly favorites" videos and beauty tutorials. The brand also benefited from videos created specifically in response to the launch of its Purifying Cleansing Brush.

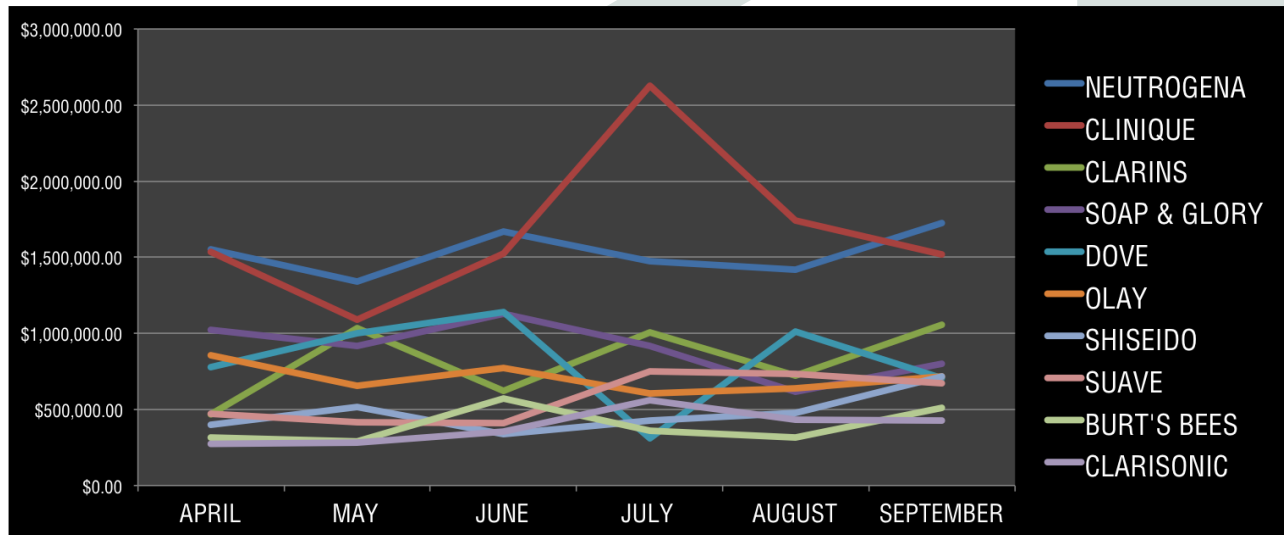


TRENDING EARNED MEDIA PERFORMANCE:

MASS MARKET VS PRESTIGE

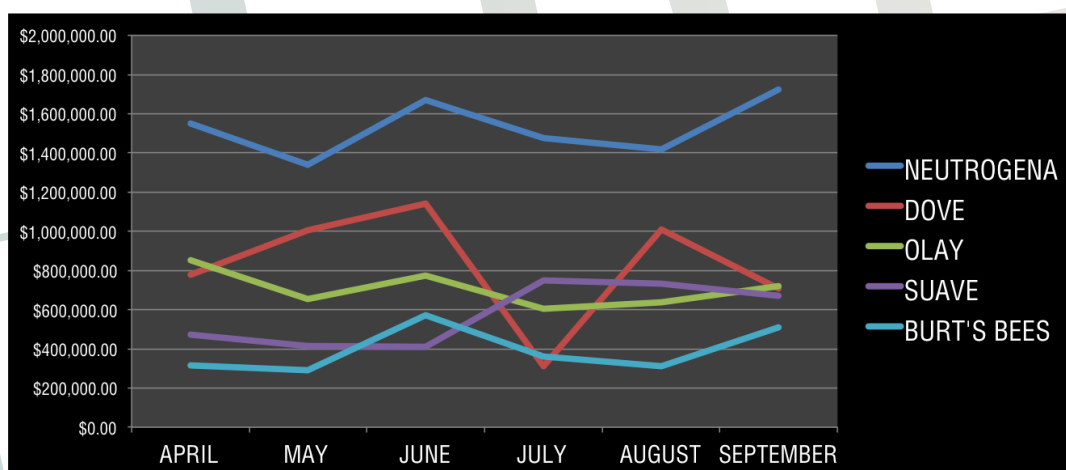
The following data
highlights the trending
EMV performance of
September's Top 10
Skincare brands over the
past six months.

TRENDING EMV PERFORMANCE



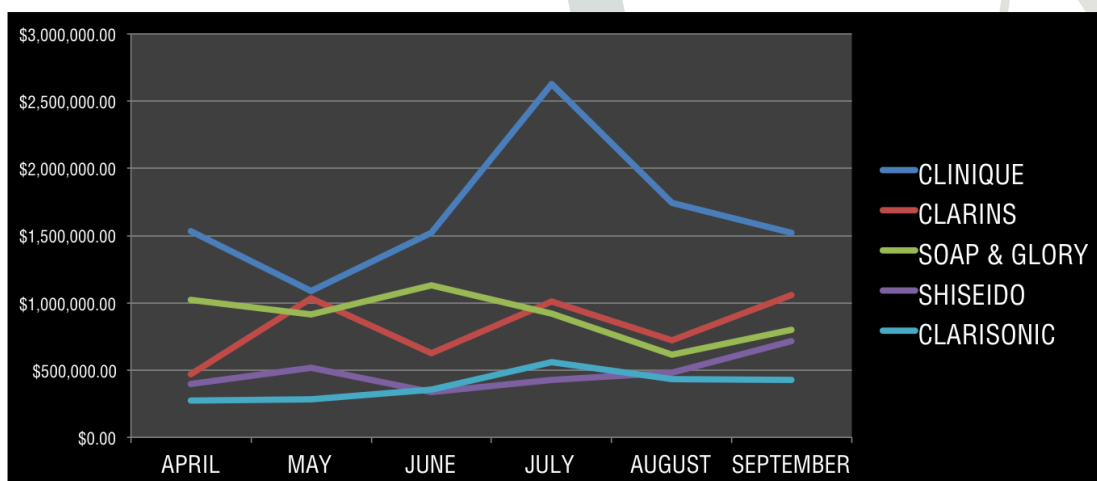
	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	TOTAL
NEUTROGENA	\$1,551,991.55	\$1,338,310.35	\$1,668,836.60	\$1,476,547.50	\$1,417,134.80	\$1,722,722.40	\$9,176,643.20
CLINIQUE	\$1,534,733.80	\$1,088,548.80	\$1,523,385.90	\$2,629,989.30	\$1,742,514.60	\$1,519,869.65	\$10,039,852.05
CLARINS	\$467,605.25	\$1,033,846.05	\$623,888.30	\$1,008,966.50	\$724,585.05	\$1,058,744.05	\$4,918,445.20
SOAP & GLORY	\$1,020,175.05	\$914,446.25	\$1,128,388.80	\$919,061.25	\$614,699.25	\$798,661.25	\$5,395,431.85
DOVE	\$777,442.35	\$1,003,208.75	\$1,140,064.15	\$310,223.25	\$1,010,494.95	\$706,739.95	\$4,953,953.40
OLAY	\$853,280.05	\$655,825.25	\$773,012.85	\$603,039.00	\$637,180.50	\$718,680.80	\$4,242,638.45
SHISEIDO	\$399,336.85	\$514,663.25	\$335,213.85	\$427,153.50	\$478,716.00	\$713,970.75	\$2,872,559.20
SUAVE	\$470,660.85	\$414,501.30	\$408,814.75	\$747,587.50	\$734,367.80	\$669,980.55	\$3,447,732.75
BURT'S BEES	\$314,613.25	\$289,659.50	\$570,690.85	\$361,335.25	\$313,221.00	\$509,561.60	\$2,360,201.45
CLARISONIC	\$273,569.25	\$280,763.25	\$356,640.00	\$559,700.30	\$431,085.00	\$428,208.50	\$2,331,586.30

MASS MARKET



	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
NEUTROGENA	\$1,551,991.55	\$1,338,310.35	\$1,668,836.60	\$1,476,547.50	\$1,417,134.80	\$1,722,722.40
DOVE	\$777,442.35	\$1,003,208.75	\$1,140,064.15	\$310,223.25	\$1,010,494.95	\$706,739.95
OLAY	\$853,280.05	\$655,825.25	\$773,012.85	\$603,039.00	\$637,180.50	\$718,680.80
SUAVE	\$470,660.85	\$414,501.30	\$408,814.75	\$747,587.50	\$734,367.80	\$669,980.55
BURT'S BEES	\$314,613.25	\$289,659.50	\$570,690.85	\$361,335.25	\$313,221.00	\$509,561.60

PRESTIGE



BRAND	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
CLINIQUE	\$1,534,733.80	\$1,088,548.80	\$1,523,385.90	\$2,629,989.30	\$1,742,514.60	\$1,519,869.65
CLARINS	\$467,605.25	\$1,033,846.05	\$623,888.30	\$1,008,966.50	\$724,585.05	\$1,058,744.05
SOAP & GLORY	\$1,020,175.05	\$914,446.25	\$1,128,388.80	\$919,061.25	\$614,699.25	\$798,661.25
SHISEIDO	\$399,336.85	\$514,663.25	\$335,213.85	\$427,153.50	\$478,716.00	\$713,970.75
CLARISONIC	\$273,569.25	\$280,763.25	\$356,640.00	\$559,700.30	\$431,085.00	\$428,208.50

TAKEAWAYS


Despite market segment patterns in channel performance, there seemed to be no real pattern in either segment's trending earned media performance over the past six months. Spikes in performance were largely dependent upon individual brand initiatives or product launches that spurred online conversations.

In addition, consistency of performance across the brands ranged independently of market segment. Brands like Olay and Soap and Glory, falling in the middle of their market segments, performed at a stable rate, compared to Clinique and Dove.

One possible explanation for the erratic performance of some of these brands, is that on average Skincare brands generate the greatest buzz with product launches. Where color cosmetics brands are able to creatively re-brand namesake collections and products for seasonal initiatives or in response to cultural moments, in reality, there are fewer opportunities for Skincare brands to be innovative beyond the release of an entirely new product. In theory, this means that there are also naturally fewer opportunities for them to engage with online communities. When we look at our top 10, this results in two patterns of earned media creation. First, the brand experiences extreme highs with products releases (i.e. Clinique when it launched the Purifying Cleansing Brush), and extreme lows in the interim. Alternatively, the brand overall generates less earned media, but at a constant rate (Olay or Clarisonic). When we compared the trending earned media performance of these brands to our past Top 10 Beauty Brands, Skincare brands were by far more unstable and volatile with content creation over time.

SOLUTION BASED

POINTS-OF-DIFFERENCE



When it comes to brand positioning, membership within a specific market is undeniably one element of what makes your brand unique and valuable in the eyes of consumers. These market segments hold powerful associations, both factual and emotional, that play heavily into consumer behavior. Market membership may in truth be a determining factor where the perceived benefits of two products are interchangeable.

That being said, just because a brand characterizes itself as mass market or prestige does not mean it can disregard competitors outside of its own market segment. Especially within Skincare, where brands are most often competing at the benefit level rather than the attribute level, brand positioning hinging upon market membership is insufficient. Brand loyalty is prevalent and contingent upon product performance and results. Good luck convincing a loyal Neutrogena customer to abandon the toner that has been a part of her daily skincare routine for over ten years, in favor of Clinique's equivalent product.

If you look around, the most successful brands in Skincare are those that establish and communicate clear solution-based points-of-difference (PODs), focused on product benefits and performance. Where the makeup consumer evaluates and compares options by specific attributes (the shade of matte red lipstick, the product's packaging, the identity of a brand), the skincare consumer is first and foremost in search of a solution: i.e. an oil-free acne-treating moisturizer or an anti-aging overnight wrinkle cream that doubles as skin brightener. As a result, skincare consumers are more likely to overlook the market segment of a brand when it promises a compelling solution.

Solution-based points-of-difference satisfy what Professor of Marketing, Kevin Lane Keller calls the three D's: Desirable, Deliverable, Differentiation. September's Top 10 Skincare Brands rely upon this criteria to give a widely available product or solution, a revitalized and innovative integrity, unique to their brand. (Kevin Lane Keller, Strategic Brand Management)

CLINIQUE VS CLARISONIC:

BATTLE OF THE BRUSHES

For an example of this kind of positioning, let's compare the earned media performance and digital strategies of Clinique and Clarisonic, focusing in particular on buzz inspired by each brand's exfoliating cleansing brush. Longtime skincare leader Clinique recently launched its Purifying Cleansing Brush, positioning its product as the more affordable direct competitor to the cleansing brush of the original innovator Clarisonic. Clinique's strategy for raising awareness for the product has been twofold. First, the brand has incorporated images, words, and themes into its marketing for the product similar to Clarisonic ("transformative"; "innovative"; "dermatologist-developed"). Using recognizable cues and associations, these points-of-parity help consumers to locate Clinique's product amongst other products and understand the solution the new product promises.

Once this familiarity is established, Clinique differentiates itself from Clarisonic by offering customers a less expensive option, with a universal brush head for women of all demographics and skin concerns. Almost every advertisement or marketing campaign for the product is careful to include one if not all of the following terms and phrases: "affordable"; "universal"; "all skin types". Its no coincidence that when we looked at the earned media created about the brand for the month of September, influencers also used these terms in their endorsements of the new brush.

Why has Clinique's Exfoliating Brush been so successful online? The product generated approximately \$180,000 in EMV for Clinique during September alone (Clarisonic's EMV was less overall, and more evenly distributed between amongst its various brushes). Clinique recognized that Clarisonic was missing a large segment of the market due to the cost of the product and less-accessible or relatable marketing that positioned Clarisonic as "advanced technology" for women with specific skin concerns. Despite being a prestige brand, Clinique's product offered a simple alternative for the substantial portion of the market seeking a daily solution for their skin, but who are unwilling to invest the same time or money on a seemingly more advanced product line.

From a strategic perspective, Clinique passed along its Purifying Cleansing Brush and complimentary products to a variety of online influencers, cross market segments. The brand received glowing endorsements from the iconic influencer, screen name Dulce Candy, who has been especially well received within Latina beauty communities and frequently featured by publishers such as Cosmopolitan Latina and Latina. Dulce Candy's Instagram posts generated some of Clinique's greatest engagement rates, making them incredibly valuable to the brand for product awareness and brand identity.

At the end of the day, although we might think of Clinique and Clarisonic as competitors within the same market segment, targeting the same customer, Clinique was successful because it offered an alternative solution that appealed to women across either segment (both mass market and prestige). Clinique's approach, both from a branding and digital marketing perspective, gave the longtime trusted skincare brand a fresh, dynamic brand identity, consistent with its past but relevant to a larger community in the present.





A BRUSH HEAD FOR EVERY SKIN TYPE

Not all skin is the same and neither are our brush heads. Find one that's right for you. For best results, replace your brush head every three months.



evonnz

3 weeks ago

I've saved the hottest color for the last #clarisonic giveaway - yes, PINK! It was the husband's birthday yesterday and I've always been stumped about what to get him. The last time I got him a chair he gave me a frown. ☹️ So I'm curious to know... What would you gift, or what was your last gift for a guy? Be it your husband, boyfriend or family member! Share it with me, and you could win a @clarisonicsg mia for yourself!!

1872clipperte, nellielim, cottonpop and 497 others like this.



khaiyingtan

thanks for the awesome giveaway!! ☺️ for my husband's past few birthdays, I've given him mainly electronic products like laptop, iPhone, iPad...seems like he can never get enough of tech stuff. ☺️since he is a Lego lover, I have also sourced online and bought him a Starwars Lego set which I had to lug home in my heavily pregnant state (then) during lunch time so that I cld wrap it first and surprise him when he gets home...the Lego was a no-reason-no-occasion present and I do love the look on his face as he unwrapped the present...priceless. it made me as happy as it made him. ☺️



dyingofcuriosity

Definitely! So he can smell nice and just the way I like!

Leave a comment...



dulceecandy

3 months ago

New video! Review/Demo: @Clinique_US Purifying Cleansing Brush! YouTube.com/DulceCandy Does the same thing as the Clarisonic, but it's more affordable and has one universal brush head for all skin types and ages! My husband loves it because he has oily skin and it left his face oil free!

cat_lover_yay, rsdqa_, adarosado22 and 18.4k others like this.



roman.numeral

@jaenmcq FYI!



jaenmcq

@roman.numeral I want receipts.



cmartiz

@geek217 FYI!



fatti.1990

@amonigh



clinique

Thanks for sharing, we love your review!



jenniferlett

I love your Beauty marks !!



aseelalfadhi

Leave a comment...



