

LA MODE
MONTHLY

TRIBE DYNAMICS

OCTOBER 2014

SKINCARE EDITION

ISSUE 2

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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
October, 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

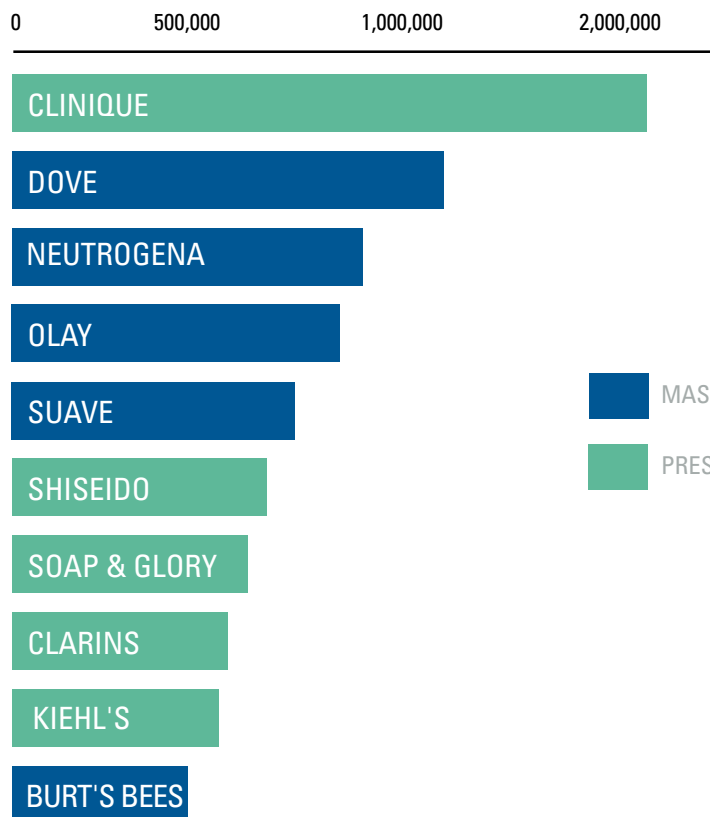
THE NUMBER OF POSTS:

- 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. CLINIQUE**
\$2,045,861.85 EMV
- 2. DOVE**
\$1,042,396.05 EMV
- 3. NEUTROGENA**
\$936,440.60 EMV
- 4. OLAY**
\$904,405.75 EMV
- 5. SUAVE**
\$791,044.55 EMV
- 6. SHISEIDO**
\$772,873.00 EMV
- 7. SOAP & GLORY**
\$635,652.30 EMV
- 8. CLARINS**
\$620,025.50 EMV
- 9. KIEHL'S**
\$616,188.30 EMV
- 10. BURT'S BEES**
\$582,033.30 EMV



TAKEAWAYS

Mass market and prestige brands were again equally represented in October's Top 10 brands in Skincare. With only a 10% difference between the two market segments, prestige just outperformed mass market brands for the month with the help of Clinique, October's leader.

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 October,
as measured by Earned
Media Value.

BLOG EMV

CLINIQUE

\$366,694.60

SUAVE

\$354,219.80

DOVE

\$321,574.80

OLAY

\$178,585.00

NEUTROGENA

\$178,484.60

KIEHL'S

\$162,419.80

SHISEIDO

\$151,225.00

BURT'S BEES

\$131,299.80

CLARINS

\$107,815.00

SOAP & GLORY

\$42,154.80

YOUTUBE EMV

CLINIQUE

\$993,742.25

SOAP & GLORY

\$516,557.50

KIEHL'S

\$362,018.50

SHISEIDO

\$342,378.00

NEUTROGENA

\$277,581.00

CLARINS

\$273,755.50

DOVE

\$233,571.25

OLAY

\$228,220.75

SUAVE

\$91,644.75

BURT'S BEES

\$54,453.50

TWITTER EMV

SUAVE

\$134,400.00

DOVE

\$110,000.00

OLAY

\$98,100.00

BURT'S BEES

\$69,000.00

CLINIQUE

\$66,000.00

NEUTROGENA

\$59,700.00

SHISEIDO

\$23,000.00

CLARINS

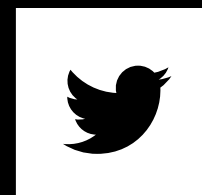
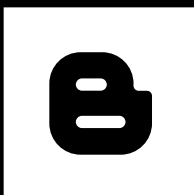
\$21,700.00

KIEHL'S

\$14,700.00

SOAP & GLORY

\$7,400.00



FACEBOOK EMV

DOVE

\$185,560.00

OLAY

\$172,615.00

CLINIQUE

\$162,345.00

SUAVE

\$145,985.00

BURT'S BEES

\$105,030.00

NEUTROGENA

\$100,870.00

SHISEIDO

\$59,845.00

KIEHL'S

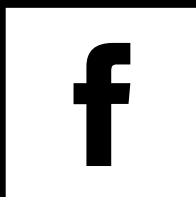
\$27,210.00

SOAP & GLORY

\$17,985.00

CLARINS

\$16,845.00



INSTAGRAM EMV

CLINIQUE

\$402,130.00

NEUTROGENA

\$294,830.00

OLAY

\$196,935.00

CLARINS

\$190,910.00

BURT'S BEES

\$177,910.00

DOVE

\$171,500.00

SHISEIDO

\$162,235.00

SOAP & GLORY

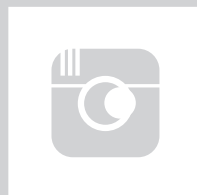
\$38,825.00

SUAVE

\$26,895.00

KIEHL'S

\$18,255.00



PINTEREST EMV

CLINIQUE

\$54,950.00

BURT'S BEES

\$44,340.00

SUAVE

\$37,900.00

SHISEIDO

\$34,190.00

KIEHL'S

\$30,760.00

OLAY

\$28,990.00

NEUTROGENA

\$24,150.00

DOVE

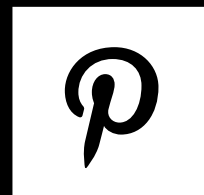
\$20,190.00

SOAP & GLORY

\$12,730.00

CLARINS

\$9,000.00



THE TOP 10

**EARNED MEDIA PERFORMANCE
BY CHANNEL:**

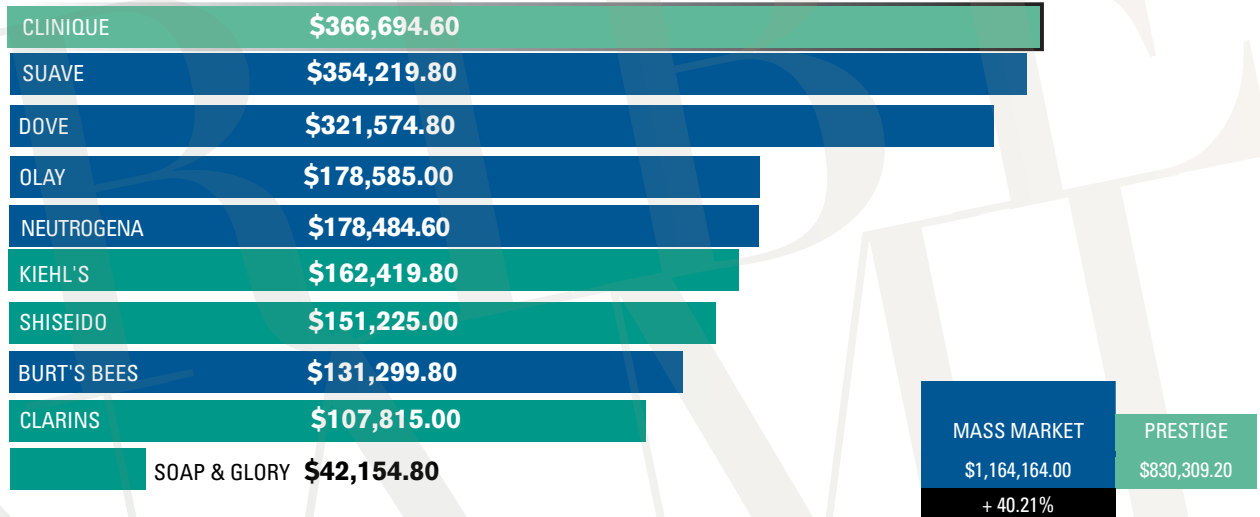
MASS MARKET VS PRESTIGE

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

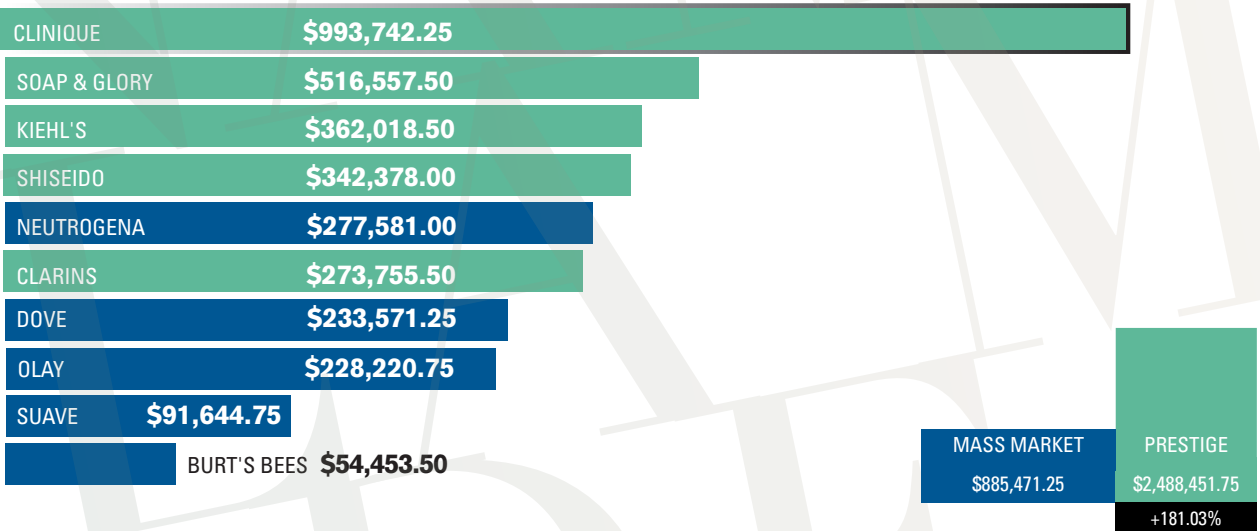
THE TOP 10 - EMV BY SOCIAL CHANNEL



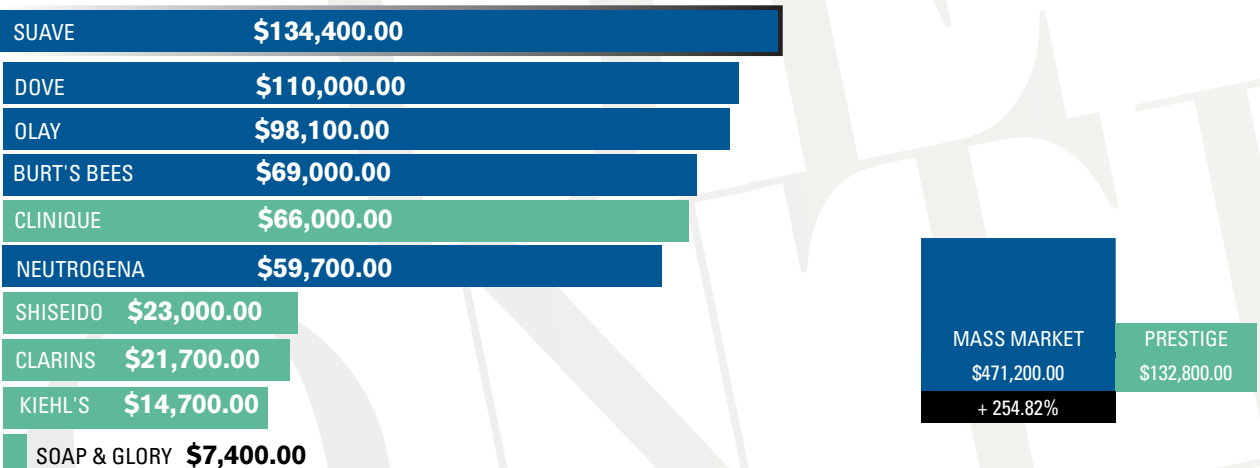
BLOG



YOUTUBE

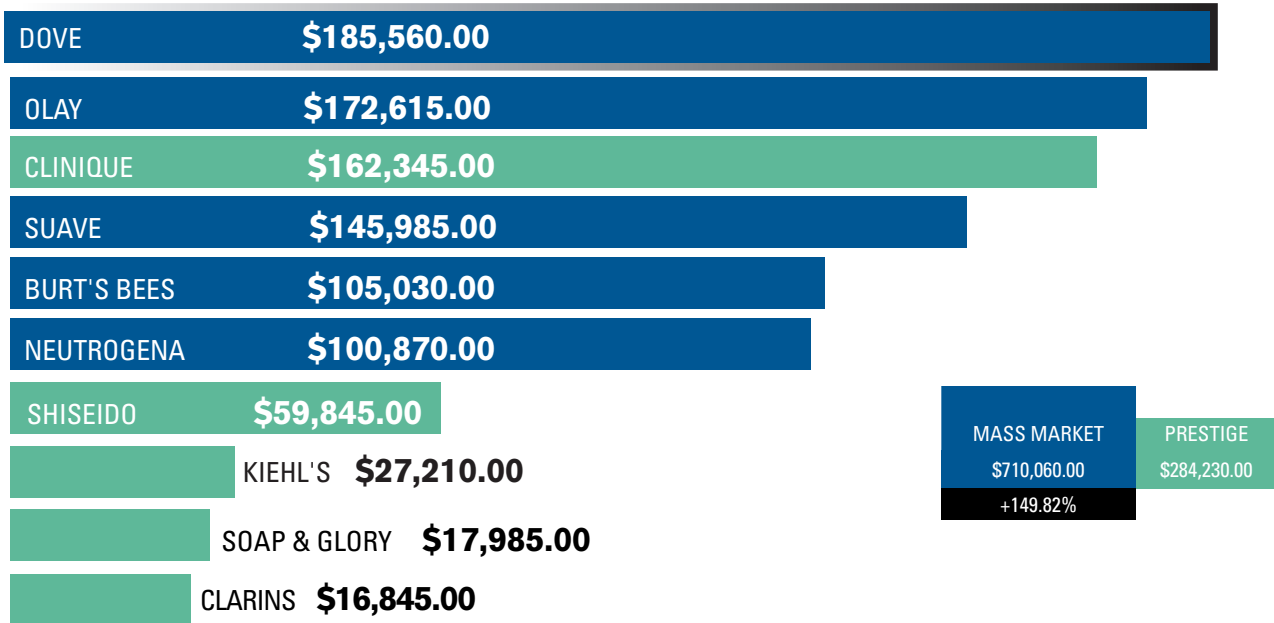


TWITTER

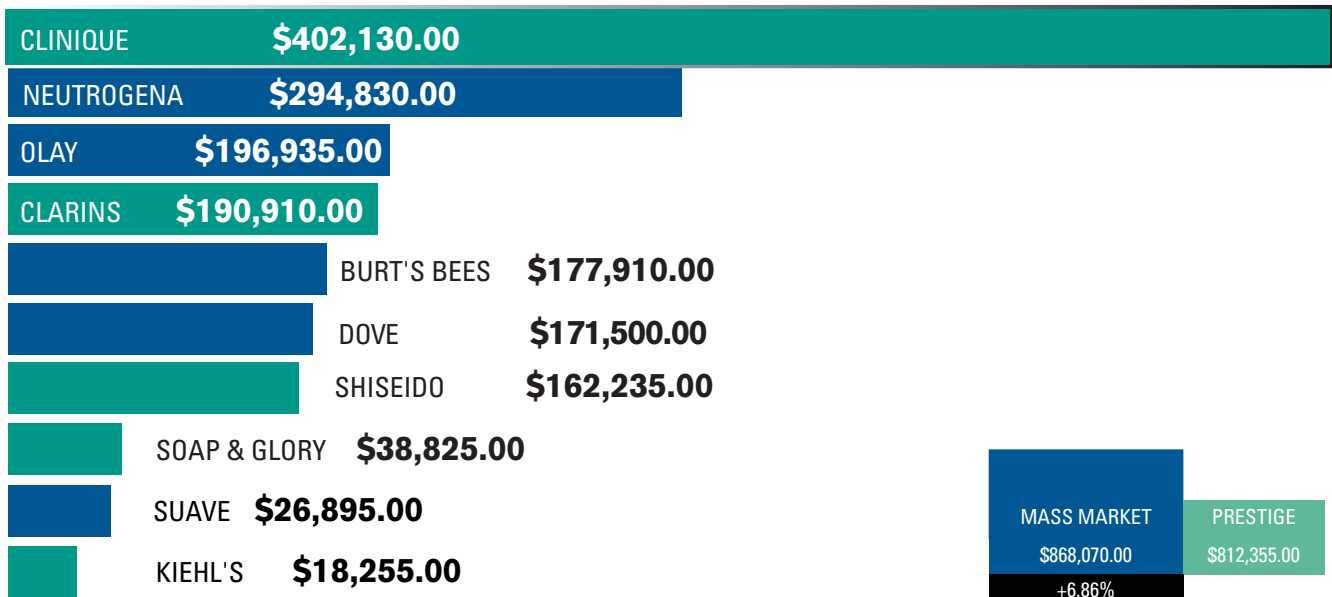


THE TOP 10 - EMV BY SOCIAL CHANNEL

FACEBOOK

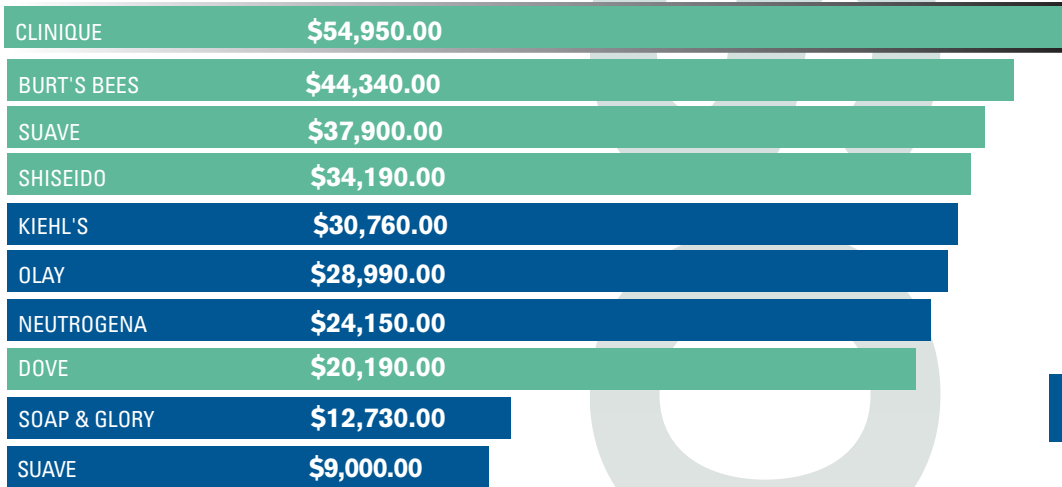


INSTAGRAM



THE TOP 10 - EMV BY SOCIAL CHANNEL

PINTEREST




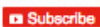
TAKEAWAYS

For October, mass market brands collectively inspired greater content creation across all monitored channels with the exception of YouTube. These brands experienced significant increases in earned media on Pinterest and reclaimed the channel from prestige, whose performance declined from September to October. Prestige maintained its overall lead based on the performance of these brands on YouTube. The channel is responsible for some of the more valuable content being created because it incorporates elements of brand awareness, community building, as well as e-commerce, each validated by a trustworthy beauty influencer. A majority of the top beauty vloggers, with audiences upwards of one to two million subscribers, will now include a list of the products used in their videos along with shoppable links to third party retailers like ULTA, Sephora, and Target.

Clinique dominated four of the six channels monitored (Blogs, YouTube, Instagram, and Pinterest), with its greatest margin on YouTube achieving an impressive \$993,742.25 EMV, 3,668,693 views, and 62 videos mentioning its brand. A majority of these videos were published by some of the top influencers within beauty who included Clinique's products in their October and Fall favorites posts. Although some of these endorsements were for the brand's cosmetic products, there seems to be a growing consensus amongst these top influencers that the Clinique name promises products that are dependable, universally beneficial regardless of skin type, and irreplaceable staples within their daily beauty regimens.



October 2014 Favorites

 From Head To Toe  958,163

129,077

+ Add to < Share ... More

4,147 80

Are you excited about Clinique's latest innovation? Click the link to learn more about the New Clinique Sonic System Purifying Cleansing Brush.

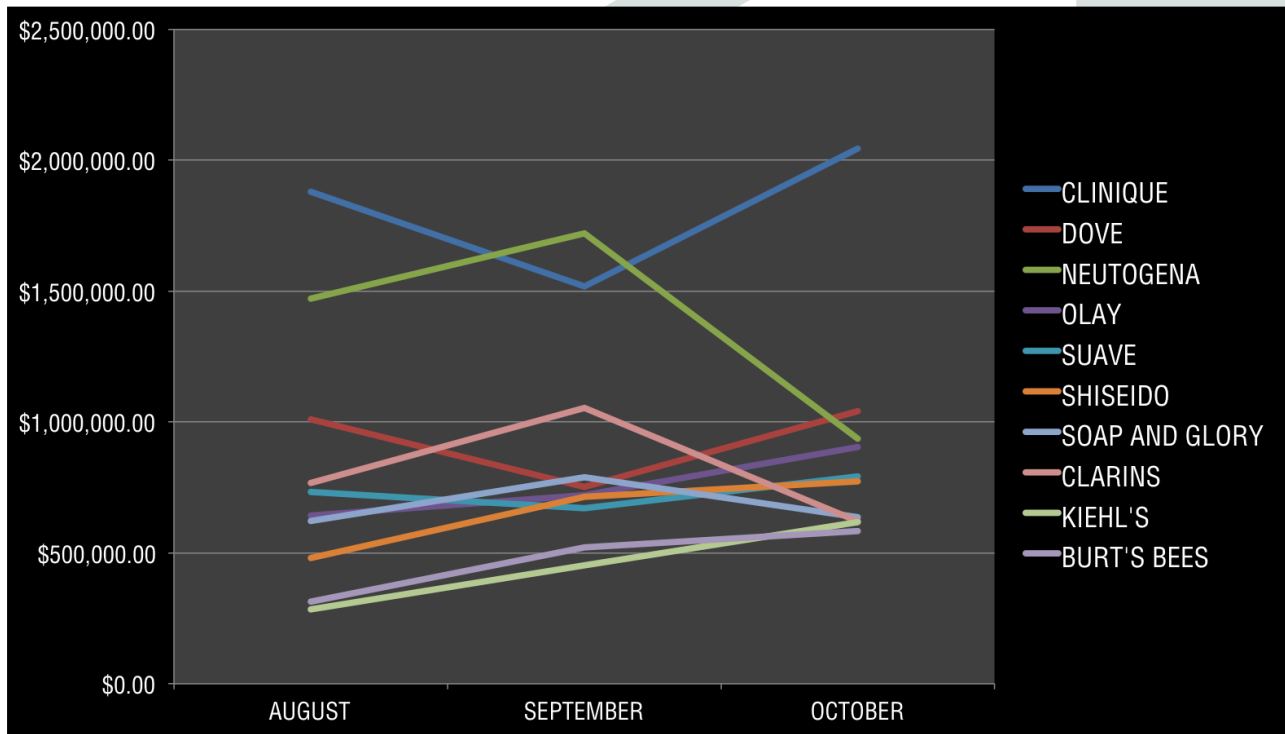
Link: <http://bit.ly/1tnli6i>

Thanks to Clinique for being so great to work with on this video.

TRENDING EARNED MEDIA PERFORMANCE: **MASS MARKET VS PRESTIGE**

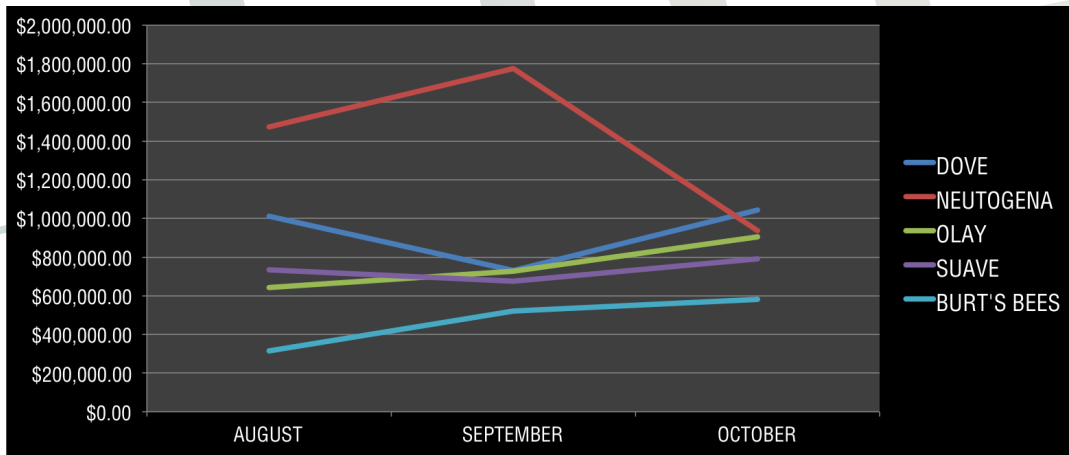
The following data
highlights the trending
EMV performance
of October's Top 10
Skincare brands over the
past three months.

TRENDING EMV PERFORMANCE



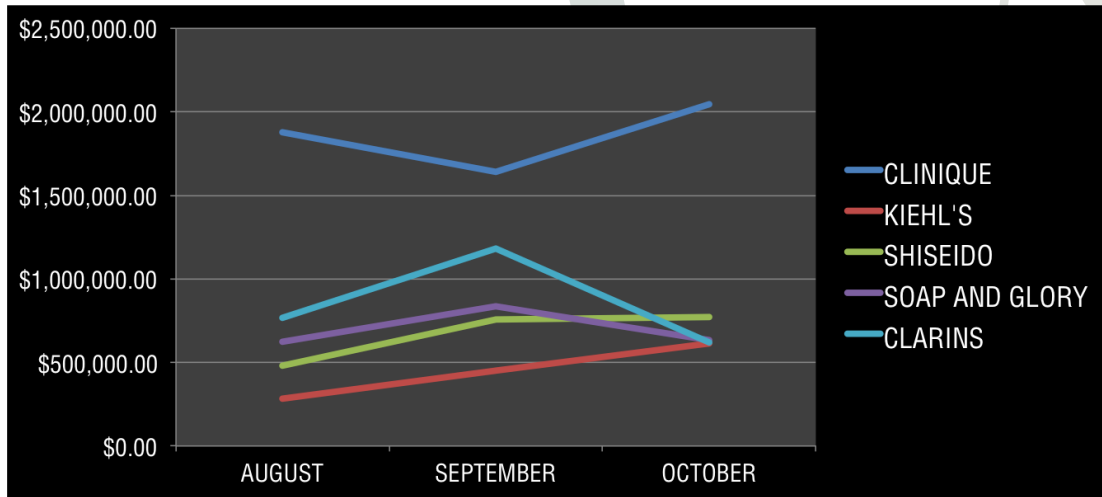
	AUGUST	SEPTEMBER	OCTOBER	TOTAL	RANK	SEP-OCT % CHANGE	AUG-OCT % CHANGE
CLINIQUE	\$1,879,921.85	\$1,517,817.65	\$2,045,861.85	\$5,443,601.35	1	34.79%	8.83%
DOVE	\$1,011,379.20	\$752,001.70	\$1,042,396.05	\$2,805,776.95	3	38.62%	3.07%
NEUTOGENA	\$1,471,972.55	\$1,721,930.45	\$936,440.60	\$4,130,343.60	2	-45.62%	-36.38%
OLAY	\$642,738.75	\$720,125.30	\$904,405.75	\$2,267,269.80	5	25.59%	40.71%
SUAVE	\$732,863.80	\$669,834.55	\$791,044.55	\$2,193,742.90	6	18.10%	7.94%
SHISEIDO	\$480,321.75	\$713,251.50	\$772,873.00	\$1,966,446.25	8	8.36%	60.91%
SOAP AND GLORY	\$621,928.00	\$788,326.50	\$635,652.30	\$2,045,906.80	7	-19.37%	2.21%
CLARINS	\$766,207.55	\$1,055,026.55	\$620,025.50	\$2,441,259.60	4	-41.23%	-19.08%
KIEHL'S	\$283,073.85	\$452,461.60	\$616,188.30	\$1,351,723.75	10	36.19%	117.68%
BURT'S BEES	\$313,795.50	\$521,901.85	\$582,096.55	\$1,417,793.90	9	11.53%	85.50%

MASS MARKET



MASS	AUGUST	SEPTEMBER	OCTOBER
DOVE	\$1,011,379.20	\$729,242.70	\$1,042,396.05
NEUTOGENA	\$1,471,972.55	\$1,774,995.65	\$936,440.60
OLAY	\$642,738.75	\$726,382.05	\$904,405.75
SUAVE	\$732,863.80	\$675,400.30	\$791,044.55
BURT'S BEES	\$313,795.50	\$521,901.85	\$582,096.55

PRESTIGE



BRAND	AUGUST	SEPTEMBER	OCTOBER
CLINIQUE	\$1,879,921.85	\$1,640,380.65	\$2,045,861.85
KIEHL'S	\$283,073.85	\$452,461.60	\$616,188.30
SHISEIDO	\$480,321.75	\$756,988.75	\$772,873.00
SOAP AND GLORY	\$621,928.00	\$836,469.25	\$635,652.30
CLARINS	\$766,207.55	\$1,179,860.55	\$620,025.50

samschuerman 3 weeks ago
 Picked up the Burt's Bees 100% natural Lip Crayon in Sedona Sands. It claims to have moisture rich wear and a cream matte color. This is a perfect Fall nude. #reinventthecrayon #itdoesntsmelllikehoney #burtsbees #lipcrayon #ad #beautyblogger #beautyvlogger #makeup #nudelips

trafalazombie, eden_ela, em1743 and 973 others like this.

mrsnicogston
 Looks lovely perfect shade. How you give a review or use it in a video ; xx

jlodavies
 Nice!!

rebecca_reviews
 I love this color, but I found it to be a bit too dry and it can get a little cakey ;/

dailyjab
 Love the color

amannyk
 @rosiesaini burts bees crayon?? ☺☺ #nextpurchase #remindme

littlemisschickie

Leave a comment...

Pinit 27 Like 5 Visit Site Send Share

Found on allure.com

Allure Magazine • 5 weeks ago
 How to get gorgeous while you sleep: Kiehl's Midnight Recovery Eye Cream does pretty much everything you'd want your eye cream to do: moisturizes, brightens undereye circles, de-puffs, and fights fine lines—all without a hint of irritation

Dulce Candy October 8 · Like Page

after shower favorites:: Aveeno positively nourishing energizing body lotion (pomegranate +grapefruit):: Michael Kors Sporty Citrus perfume:: Burt's Bees brightening even-tone moisturizer:: & Dove Advance care deodorant

Like · Comment · Share

1,089 people like this.

TAKEAWAYS

Clinique, Dove, and Kiehl's experienced the greatest gains in earned media performance between September and October (35%, 39%, 36% respectively). Dove's month over month improvement can be attributed to its performance on Facebook, where the brand benefited from a variety of content from blogger give-aways, posts in response to sponsored campaigns and hashtags, as well as more organic endorsements from beauty influencers. Newcomer to our Top 10, Kiehl's posted impressive EMV numbers on both Youtube and Pinterest. On YouTube, Kiehl's was included in similar videos as Clinique, showcasing the staple skincare products in an influencer's everyday regimen. On Pinterest, some of the brand's most valuable content was created by influential fashion magazines and publishers including Vogue, Allure and the online beauty destination Byrdie Beauty.

For the three month period in its entirety, Kiehl's and Burt's Bee's showed the greatest overall improvements with 118% and 86% respectively. Burt's Bee's also excelled on Pinterest, in addition to Instagram and Facebook where bloggers celebrated the brand's extension into skincare-conscience cosmetic products.

Neutrogena and Clarins both experienced decreases between September and October as well as from August to October. After leading in EMV across the board for September, Neutrogena failed to claim the number one seed for any of the channels in October. The brand experienced its greatest loss on Instagram, where it had excelled with content from fashion publishers, when Bella Thorne's celebrity endorsement became officially "last month's news".

THE MODERN EDGE

INGREDIENT BRANDING WITHIN SKINCARE

The reality of the digital age is that at all times consumers have available at their fingertips an incredible amount of information. Self-taught, refined knowledge is now tightly wound into the rational and emotional associations consumers form around a brand, providing points of comparison when choosing between brands. Today's informed consumers demand greater transparency and will hold brands accountable when it comes to product ingredients and manufacturing processes. Marketers must take this into consideration at all stages of brand management and digital strategy, from marketing campaigns to website content and product packaging.

Ingredient branding has in many ways come to define the state of competition in skincare. On the one hand, it creates a significant barrier to entry for new brands, making it all the more difficult to enter today's market with a skincare product that contains recognizable chemicals or that lacks specific ingredients based upon the desired/promised solution. On the other, for existing brands, product ingredients are essential points-of-parity for entry into the industry's ring of elite brands.

Ingredient branding succeeds where the consumer has strong rational and/or emotional associations with specific components of a product. Beginning with the more rational, emphasizing a product's scientific makeup gives customers a measurement by which to compare brands based on quality and performance. At the point-of-purchase, when a consumer recognizes an ingredient displayed alongside a brand name and logo, he/she subconsciously makes an assessment about the quality of the product and the experience they will have before trying it for themselves.

In terms of emotional associations, the sheer presence of ingredients on the exterior of a package, drives conclusions about the credibility and trustworthiness of a brand. Additionally, for those consumers that have come across these ingredients before, they may have their own personal understanding and imagery associated based on past experiences or reactions to specific chemicals. Specific ingredients may take on an imagery themselves of happiness and satisfaction, or disappointment and pain. Albeit abstract, these secondary associations about performance and quality, can often be determining factors for consumers choosing between similar products and lacking additional information.

A focus on appealing to consumers through ingredient branding has been substantiated and reinforced by skincare brands. If you look through the various products Sephora houses, you'll see on almost every physical product a list of attributes: "paraben-free", "sulfate-free", "organic", in lettering only just smaller than the brand name. The retailer's e-commerce experience affirms the added importance of these touchpoints, including a filter that allows shoppers to search for products containing or without specific ingredients.



EARNING TRUST WITH OPEN DIALOGUES

For most consumers, choosing a skincare product is a very important and intimate decision, the stakes are incredibly high where the product can have a dramatic and potentially lasting effect. As a result, encouraging an open dialogue about the ingredients that go into products and manufacturing choices can help marketers elevate their brand in the public eye and gain the trust of consumers. The more open brands can be about their products, and the more information consumers have, the more likely they will feel comfortable investing. For marketers promoting these products, the goal should be to capture the tone of this amenable transparency through brand and product experiences that are both informative, but also personalized and intimate.

It goes without saying that when a brand is upfront about the ingredients and the making of its products, they appear more trustworthy. Because there is generally less cross-brand experimentation amongst skincare consumers, once a consumer deems a brand and its products trustworthy, they will more than likely remain loyal lifetime customers.



