

LA MODE MONTHLY

TRIBE DYNAMICS

NOVEMBER 2014

SKINCARE EDITION

ISSUE 3

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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.

NOVEMBER

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
November, 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

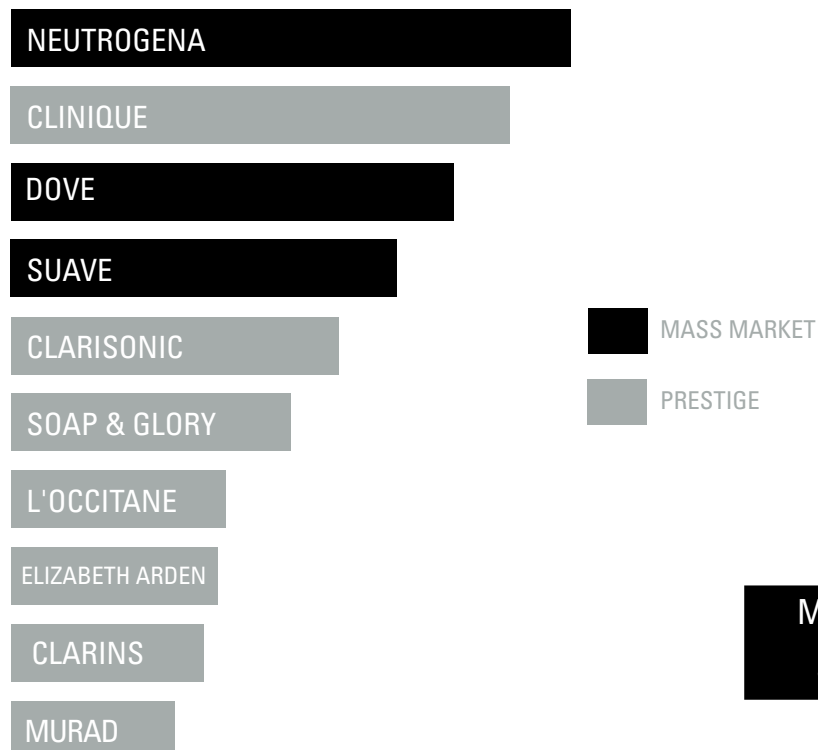
THE NUMBER OF POSTS:

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

0 500,000 1,000,000 2,000,000



1. NEUTROGENA
\$1,679,801.00 EMV

2. CLINIQUE
\$1,503,521.05 EMV

3. DOVE
\$1,124,424.75 EMV

4. SUAVE
\$1,024,566.50 EMV

5. CLARISONIC
\$921,047.75 EMV

6. SOAP & GLORY
\$866,575.75 EMV

7. L'OCCITANE
\$674,303.25 EMV

8. ELIZABETH ARDEN
\$647,051.25 EMV

9. CLARINS
\$628,350.50 EMV

10. MURAD
\$529,304.00 EMV

MASS MARKET
\$3,828,792.25

PRESTIGE
\$5,770,153.55

50.70%

TAKEAWAYS

For the month of November, Neutrogena reclaimed the lead with \$1,679,801 EMV. The brand led on Instagram thanks to a series of valuable posts published in response to its sponsorship of the Latin Grammys at the end of the month. The brand used its influence and reputation to recruit some of the community's top female influencers to represent its brand at the event.

After dropping out of our top 10, Clarisonic had an impressive comeback in November. The brand more than doubled its October earned media performance, excelling on Instagram with valuable posts from partner Birchbox.

In November, L'Occitane, Elizabeth Arden, and Murad all joined our Top 10, with drastic improvements from the previous months. In addition to these brands, there were many others whose earned media performance placed them just shy of the leaderboard. Overall, we are beginning to see greater success amongst a diverse group of brands, across multiple segments.

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 November,
as measured by Earned
Media Value.

BLOG EMV

CLINIQUE

\$341,459.80

DOVE

\$298,780.00

CLARISONIC

\$194,305.00

SUAVE

\$182,590.00

NEUTROGENA

\$157,655.00

CLARINS

\$145,695.00

ELIZABETH ARDEN

\$111,475.00

MURAD

\$87,535.00

L'OCCITANE

\$75,860.00

SOAP & GLORY

\$69,415.00

YOUTUBE EMV

SOAP & GLORY

\$758,910.75

CLINIQUE

\$737,696.25

CLARINS

\$351,440.50

DOVE

\$342,919.75

NEUTROGENA

\$306,446.00

ELIZABETH ARDEN

\$298,231.25

CLARISONIC

\$264,972.75

SUAVE

\$228,636.50

L'OCCITANE

\$214,628.25

MURAD

\$50,999.00

TWITTER EMV

SUAVE

\$137,000.00

NEUTROGENA

\$52,300.00

CLINIQUE

\$51,900.00

DOVE

\$47,500.00

L'OCCITANE

\$47,100.00

MURAD

\$24,300.00

CLARISONIC

\$21,800.00

ELIZABETH ARDEN

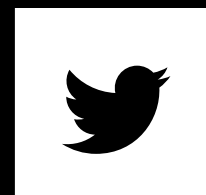
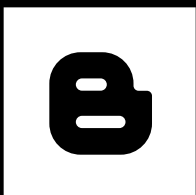
\$17,500.00

CLARINS

\$12,100.00

SOAP & GLORY

\$6,400.00



FACEBOOK EMV

DOVE

\$366,220.00

SUAVE

\$281,150.00

L'OCCITANE

\$222,610.00

CLINIQUE

\$173,670.00

MURAD

\$146,400.00

NEUTROGENA

\$137,250.00

CLARISONIC

\$112,180.00

ELIZABETH ARDEN

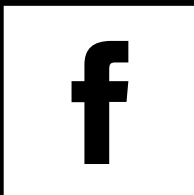
\$79,000.00

CLARINS

\$18,740.00

SOAP & GLORY

\$4,695.00



INSTAGRAM EMV

NEUTROGENA

\$1,012,120.00

CLARISONIC

\$286,750.00

MURAD

\$206,030.00

SUAVE

\$184,980.00

ELIZABETH ARDEN

\$127,465.00

CLARINS

\$92,015.00

CLINIQUE

\$90,805.00

L'OCCITANE

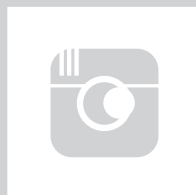
\$88,725.00

DOVE

\$52,455.00

SOAP & GLORY

\$22,685.00



PINTEREST EMV

CLINIQUE

\$107,990.00

CLARISONIC

\$41,040.00

L'OCCITANE

\$25,380.00

DOVE

\$16,550.00

MURAD

\$14,040.00

NEUTROGENA

\$14,030.00

ELIZABETH ARDEN

\$13,380.00

SUAVE

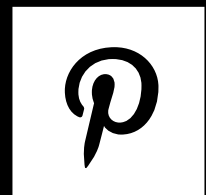
\$10,210.00

CLARINS

\$8,360.00

SOAP & GLORY

\$4,470.00



THE TOP 10

**EARNED MEDIA PERFORMANCE
BY CHANNEL:**

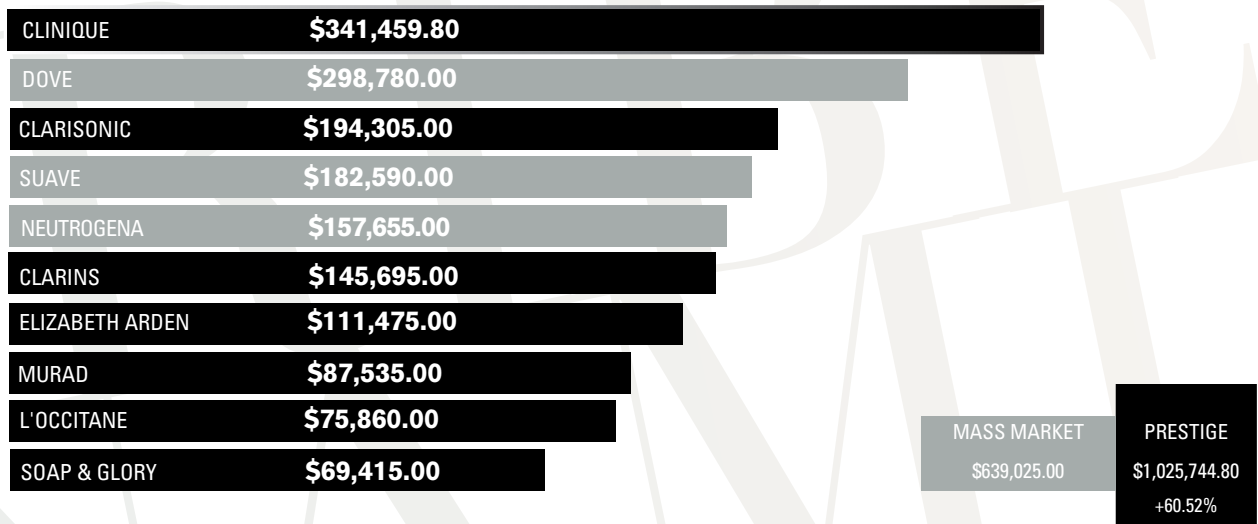
MASS MARKET VS PRESTIGE

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

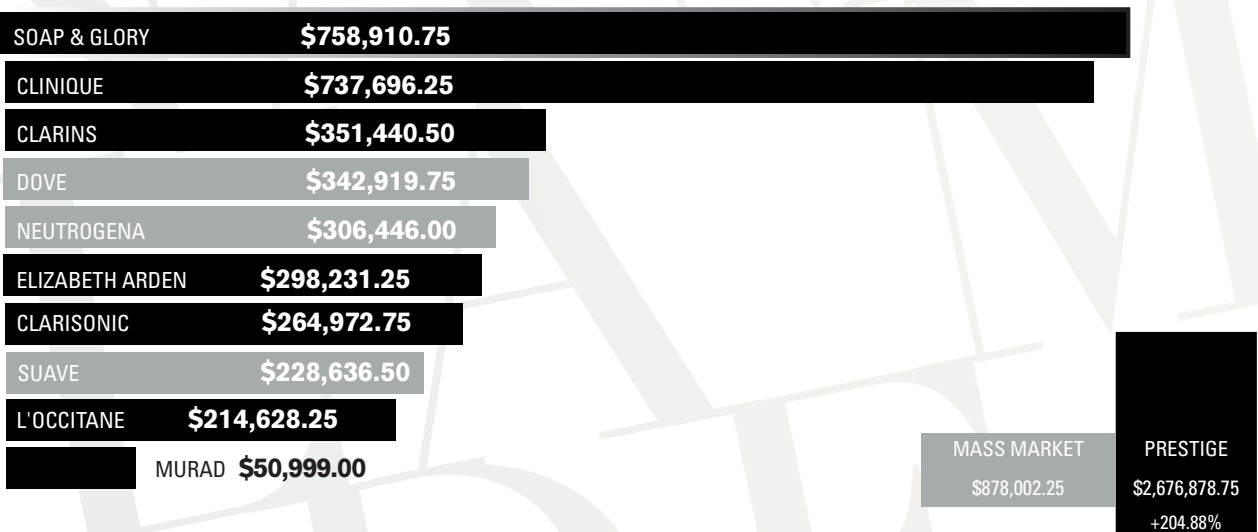
THE TOP 10 - EMV BY SOCIAL CHANNEL



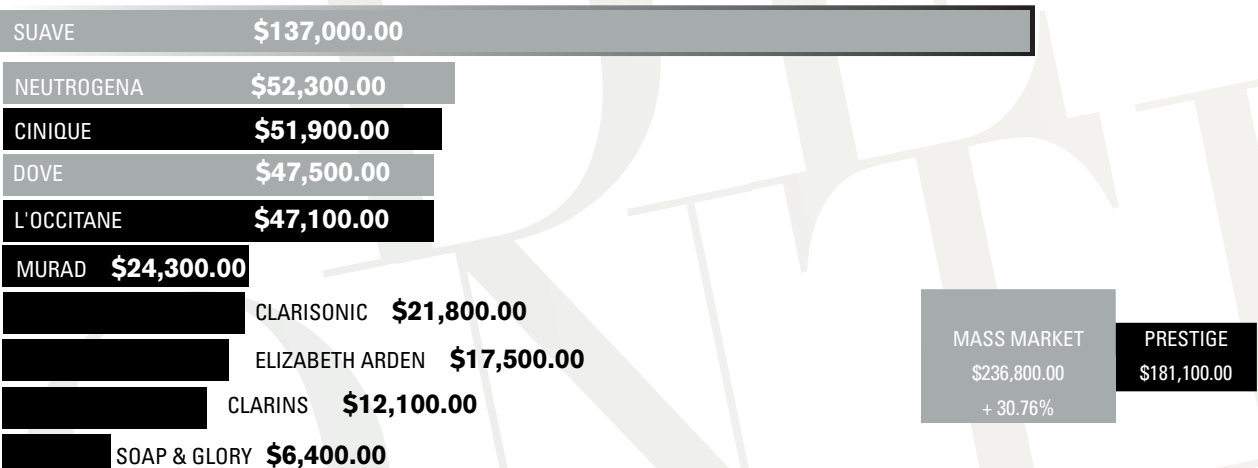
BLOG



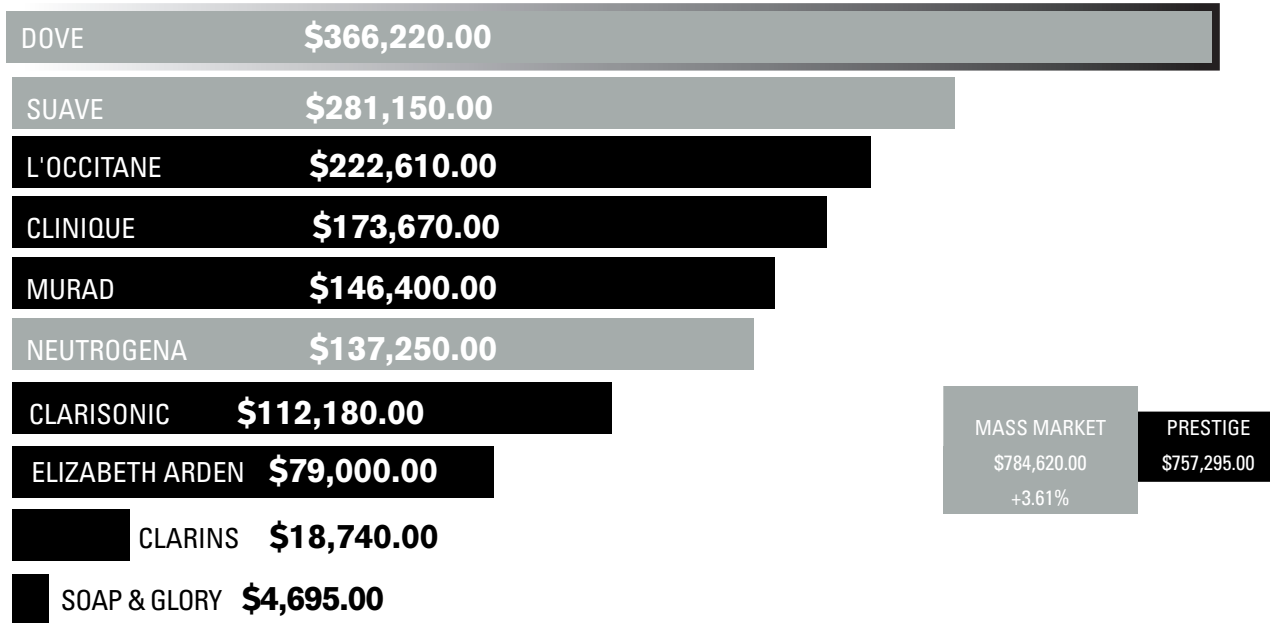
YOUTUBE



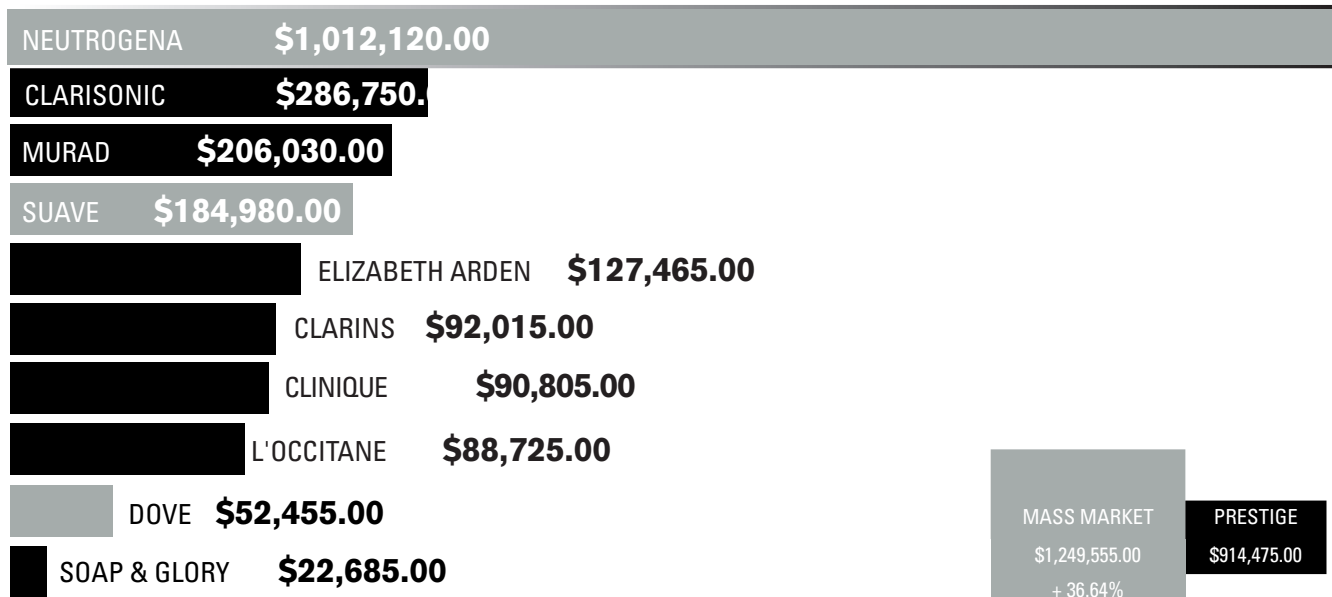
TWITTER



FACEBOOK



INSTAGRAM



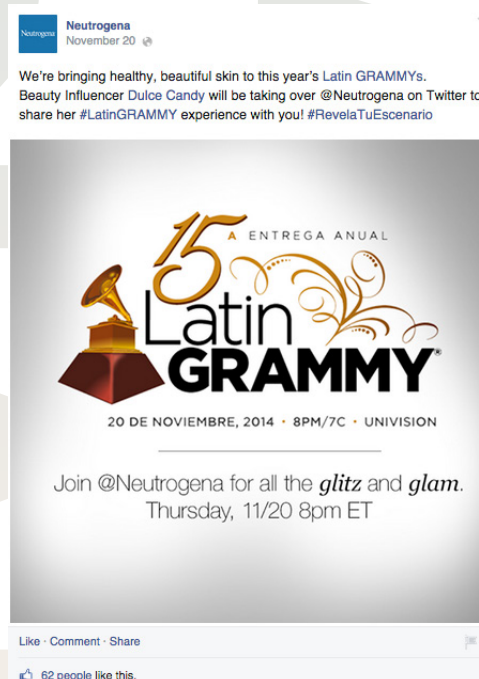
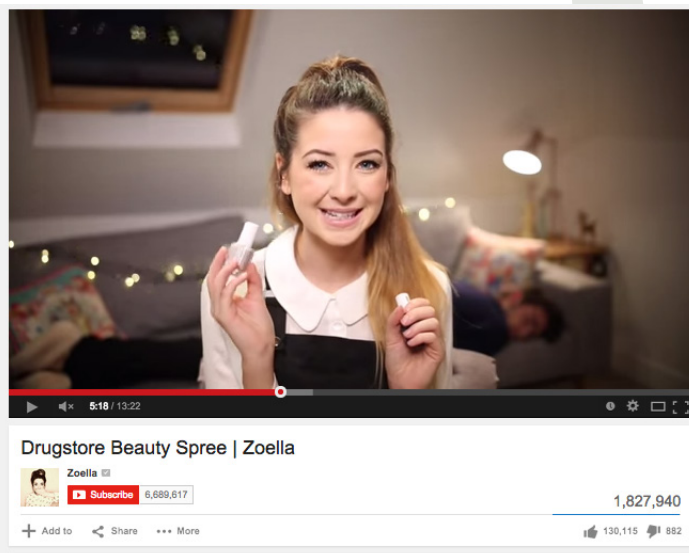
THE TOP 10 - EMV BY SOCIAL CHANNEL

PINTEREST

CLINIQUE	\$107,990.00
CLARISONIC	\$41,040.00
L'OCCITANE	\$25,380.00
DOVE	\$16,550.00
MURAD	\$14,040.00
NEUTROGENA	\$14,030.00
ELIZABETH ARDEN	\$13,380.00
SUAVE	\$10,210.00
CLARINS	\$8,360.00
SOAP & GLORY	\$4,470.00

MASS MARKET
\$40,790.00

PRESTIGE
\$214,660.00
+426.26%



TAKEAWAYS

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

In November, prestige brands extended their lead over mass market brands, approximately doubling the gap in earned media performance that existed in October. With seven of the top ten brands, prestige outperformed mass market competitors by 20.31% overall. However, of the six channels monitored, mass was still able to secure a higher overall EMV on Facebook, Instagram, and Twitter.

The overall success of November's prestige brands can be attributed to a significant lead on YouTube, in addition to performance on Pinterest and blogs. For the second month running, prestige brands have showed the greatest dominance on YouTube. In October, it was the only channel where prestige outperformed mass market brands, at a great enough margin to also outperform mass overall. Brands in this segment are benefiting from "haul" videos, in which a vlogger shares with her audience the latest additions to her makeup collection. For the month, a majority of these videos, which can receive upwards of 1 million views, were specifically "Sephora hauls" followed by "Ulta hauls". As one of the leading retailers in the industry, Sephora has a great deal of control over the products favored and talked about by some of the most well-recognized, most-watched influencers.

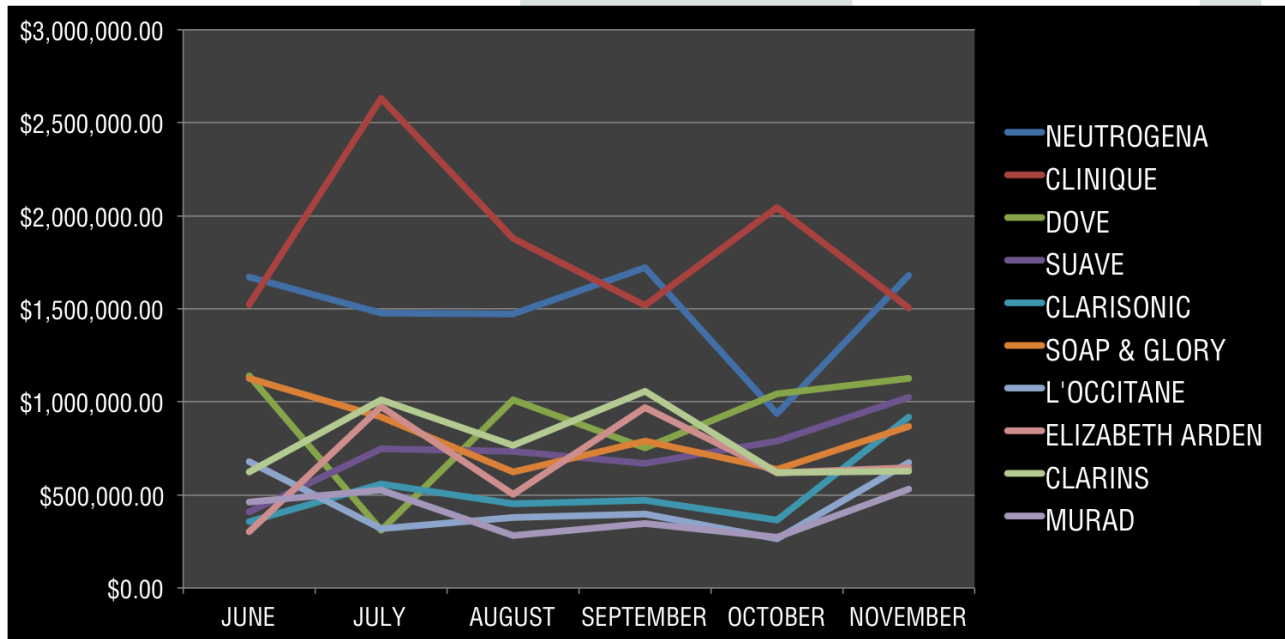
Prestige brands outperformed mass market brands most notably on Pinterest by approximately 426%. Although there was not a specific brand or campaign responsible for the drastic swing in influence from October (when mass lead by 9%), prestige again owes a great deal of its success to pins associated with Sephora. These pins were overwhelmingly of individual products or collections sold by the retailer that included links to Sephora's e-commerce website.

TRENDING EARNED MEDIA PERFORMANCE:

MASS MARKET VS PRESTIGE

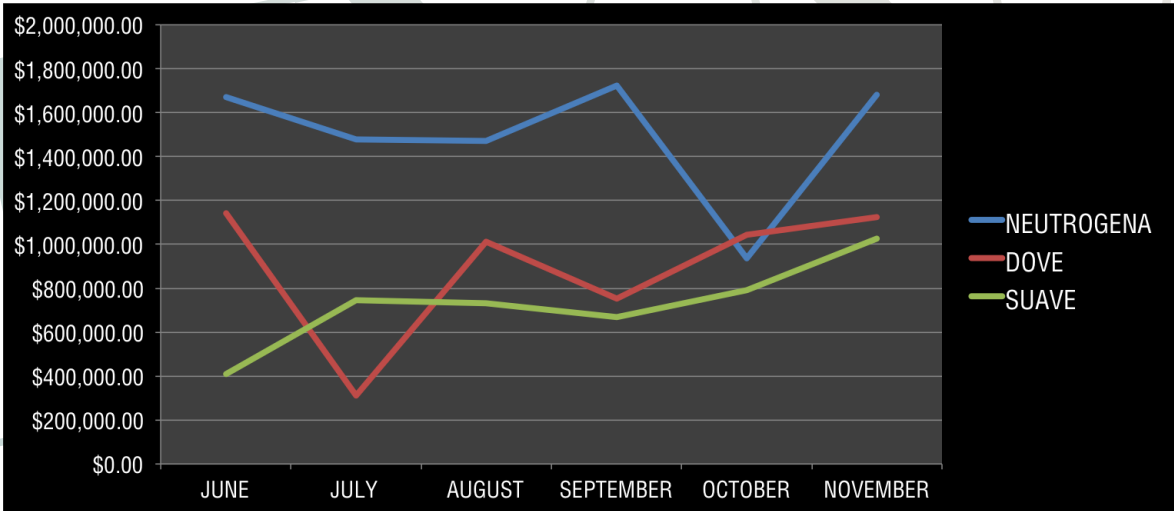
The following data
highlights the trending
EMV performance of
November's Top 10
Skincare brands over the
past three months.

TRENDING EMV PERFORMANCE



BRAND	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	TOTAL
NEUTROGENA	\$1,668,836.60	\$1,476,547.50	\$1,471,972.55	\$1,721,930.45	\$936,440.60	\$1,679,801.00	\$8,955,528.70
CLINIQUE	\$1,523,385.90	\$2,629,989.30	\$1,879,921.85	\$1,517,817.65	\$2,045,861.85	\$1,503,521.05	\$11,100,497.60
DOVE	\$1,140,064.15	\$310,223.25	\$1,011,379.20	\$752,001.70	\$1,042,396.05	\$1,124,424.75	\$5,380,489.10
SUAVE	\$408,814.75	\$747,587.50	\$732,863.80	\$669,834.55	\$791,044.55	\$1,024,566.50	\$4,374,711.65
CLARISONIC	\$356,640.00	\$559,700.30	\$452,869.75	\$473,438.50	\$364,827.25	\$921,047.75	\$3,128,523.55
SOAP & GLORY	\$1,128,388.80	\$919,061.25	\$621,928.00	\$788,326.50	\$635,652.30	\$866,575.75	\$4,959,932.60
L'OCCITANE	\$679,451.50	\$317,107.25	\$377,041.05	\$398,883.50	\$264,308.25	\$674,303.25	\$2,711,094.80
ELIZABETH ARDEN	\$302,626.35	\$972,911.85	\$501,760.50	\$968,962.25	\$618,734.75	\$647,051.25	\$4,012,046.95
CLARINS	\$623,888.30	\$1,008,966.50	\$766,207.55	\$1,055,026.55	\$620,025.50	\$628,350.50	\$4,702,464.90
MURAD	\$464,225.30	\$527,310.00	\$279,863.85	\$345,139.05	\$271,331.00	\$529,304.00	\$2,417,173.20
							\$51,742,463.05

MASS MARKET



BRAND	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	TOTAL
NEUTROGENA	\$1,668,836.60	\$1,476,547.50	\$1,471,972.55	\$1,721,930.45	\$936,440.60	\$1,679,801.00	\$8,955,528.70
DOVE	\$1,140,064.15	\$310,223.25	\$1,011,379.20	\$752,001.70	\$1,042,396.05	\$1,124,424.75	\$5,380,489.10
SUAVE	\$408,814.75	\$747,587.50	\$732,863.80	\$669,834.55	\$791,044.55	\$1,024,566.50	\$4,374,711.65
							\$18,710,729.45

BRAND FOUNDER
#SEPHORATAKEOVER
NOVEMBER 10-14

sephora
4 weeks ago
Stay tuned! Every day this week, a different brand founder is taking over our Instagram account. Follow for exclusive fun from @AnastasiaBeverlyHills @thedrybar @bobbibrown @josiemarancosmetics & @thekatvond #SephoraTakeover

abigail_roston, arianator_824, emily.katherine and 16.9k others like this.

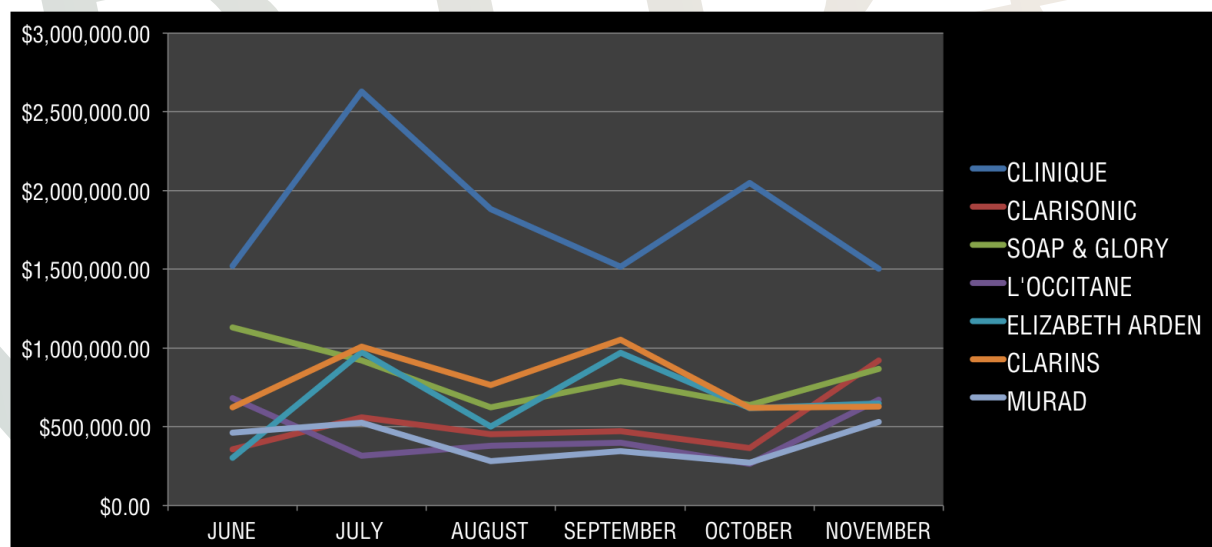
kimaginethis
Check out my page for daily outfit ideas! 🌸🌸🌸

lipstickaddict_
You should spend less time organising instagram events and more time unblocking the international market from your sale before it ends in less than 24 hours! You guys are crazy if you think we will be buying from your store when it opens in australia when these are your company values. Not to mention the obvious racial bannings of asian accounts. Get your shit sorted sephora, it's obvious your website is fine when we can download VPNs to access it but it's still "broken" for normal usage. I wonder if it will be "fixed" after the sale ends? []

ammysays
@lipstickaddict_ Is that why I haven't been able to order from the US? Even non-sale orders are blocked

Leave a comment...

PRESTIGE



BRAND	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	TOTAL
CLINIQUE	\$1,523,385.90	\$2,629,989.30	\$1,879,921.85	\$1,517,817.65	\$2,045,861.85	\$1,503,521.05	\$11,100,497.60
CLARISONIC	\$356,640.00	\$559,700.30	\$452,869.75	\$473,438.50	\$364,827.25	\$921,047.75	\$3,128,523.55
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L'OCCITANE	\$679,451.50	\$317,107.25	\$377,041.05	\$398,883.50	\$264,308.25	\$674,303.25	\$2,711,094.80
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MURAD	\$464,225.30	\$527,310.00	\$279,863.85	\$345,139.05	\$271,331.00	\$529,304.00	\$2,417,173.20
							\$33,031,733.60

TAKEAWAYS

November for a majority of our brands ended with upward trends in earned media performance. The only brand to not outperform its overall EMV for October was Clinique, who still managed to pull off the highest EMV sum for the full six months shown. By contrast, a majority of prestige brands experienced a decline in performance in October, recovering from this lull in online activity with the burst of holiday content that hit in November.

In respect to a market segment comparison, it's interesting to note that in addition to two mass market brands dropping out of our top 10 for November, a majority of the brands hovering right at the bottom cusp were prestige. Those brands included Dermalogica, Biore, Kiehl's, and Philosophy. As we discussed in October's Skincare report, ingredient branding has come to play a central role in consumer decision-making; modern consumers hold skincare brands in particular accountable when it comes to the quality of ingredients and production processes. It would make sense that prestige and luxury brands are benefiting from this shift in consumer mindset. These products often include ingredients that are more expensive and more difficult for manufacturers to attain, or at least consumers believe this to be the case based on the price differential between prestige and mass.

With skincare consumers placing greater value in the quality of the product as opposed to the price, an upward trend in the EMV of prestige brands makes perfect sense. It's also reasonable to assume that in conjunction with increases in EMV, prestige brands are benefiting from greater success in offline sales.

ANALYSIS

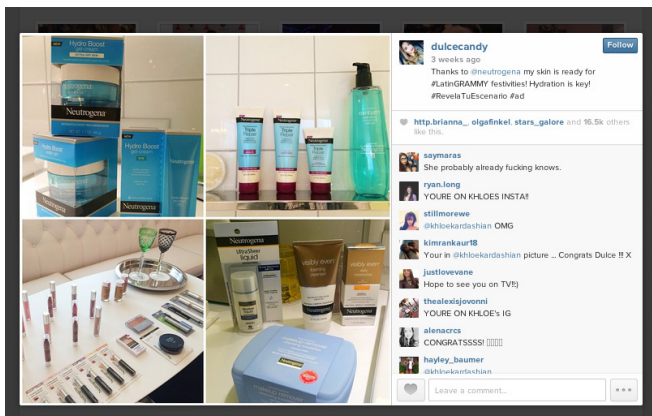
STORYTELLING AND SPONSORSHIP:

ELEVATION THROUGH EXPERIENCES



Event marketing and sponsorship as a means of engaging with current and prospective customers is by no means a novel phenomenon amongst marketers. However, there is a need to rethink the way that these programs have been used in the past, in the context of the digital age and the modern consumer. Those brands that have had the greatest success extending and strengthening its relationships with consumers have seamlessly integrated in-person, physical experiences with those created online.

To further shed light on this form of marketing, we will use Neutrogena's official sponsorship of the Latin Grammys this past month as a case study. In celebration of the Award Show's 15th procession in Las Vegas, Neutrogena connected with a small group of Latin icons to represent the brand at the event. Over the course of a few days, these spokespersons, models, bloggers, fashionistas, were treated to a star-studded Grammy experience from being pampered at the SLS Las Vegas Hotel Spa, tickets to the event, and of course a generous supply of Neutrogena product to help them prepare for their green carpet debuts.



Latina beauty influencer and icon Dulce Candy was one of the women chosen by the brand to attend the event. On the day of the awards, Neutrogena handed over the reigns of its Twitter handle to the blogger who tweeted and shared pictures of her experience over the course of the day. Each tweet was branded with the Neutrogena-coined hashtag, #RevelaTuEscenario, which translates to "Reveal your Stage". (pic) Through the real-time posts published by Dulce Candy, Neutrogena customers from anywhere in the world were able to take part in her once-in-a-lifetime experience.

The value of this content extends well beyond the number of likes, comments, shares, as well as the sheer entertainment it provided to thousands of Neutrogena fans. Neutrogena's sponsorship of the event was informative, extending consumer knowledge of the brand through its apparent alignment with a specific community, interests, and values. By elevating Dulce Candy, Neutrogena was able to construct new associations through a relatable personality embodying both current and aspirational brand attributes.

Neutrogena's decision to make Dulce Candy control of its Twitter handle gave the content an impartial intimacy that the brand would not have been able to achieve on its own. From a consumer's perspective, the exercise itself demonstrated Neutrogena's trustworthiness as a brand. Additionally, real-time content by its nature is free-flowing and casual, making it all the more relatable.

Neutrogena @neutrogena · Nov 20

Walking the green carpet at the #LatinGRAMMY Awards! 😍 How surreal! <3 DC #RevelaTuEscenario



36 206 View more photos and videos

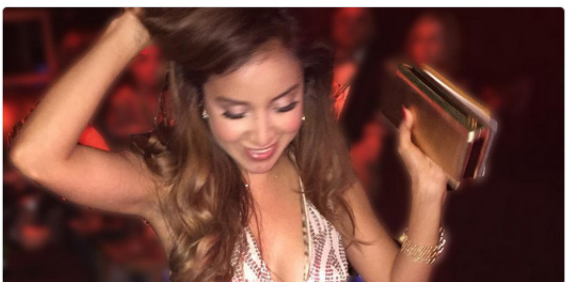
Neutrogena @neutrogena · Nov 20

Your skin is your stage. Make it a hit! #LatinGRAMMY #RevelaTuEscenario

4

Neutrogena @neutrogena · Nov 20

The show's over but the music was unforgettable. I won't stop dancing if you don't! #LatinGRAMMY #RevelaTuEscenario



10 44 View more photos and videos

It's also very clear from the content created about the brand within the context of the Latin Grammys, that Neutrogena was targeting a specific demographic and community. The sponsorship program allowed Neutrogena to positively associate its brand with the community of Latina women in attendance or watching the event remotely. In one Instagram post, Dulce Candy is posing in front of a glowing "Neutrogena" with the caption: "Celebrating my heritage". Its sponsorship helped the brand reach and identify with new audiences of influencers and potential customers.

Was Neutrogena's sponsorship a success? From a quantitative perspective, the brand experienced an overall boost in earned media performance between October and November, the month of the Latin Grammys. The program was responsible for fifteen of the twenty most valuable posts created about Neutrogena for the month. In addition, Neutrogena inspired an incredible amount of activity and content creation on Instagram, far outperforming any competitor.

More abstractly, Neutrogena was able to evoke emotions and connect with its intended audience in a meaningful way. As proof of this, the most valuable post for the entire month of November was an Instagram post published by Dolce Candy that stated: "I want to thank Neutrogena for rewarding me with the opportunity of a lifetime. I will never forget the magical and amazing (experience) that were these days!"

Although its hard to argue that the sponsorship was not a success, Neutrogena may have been able to further extend its influence by pairing this earned media with owned media. As much as it was important for Dolce Candy and other influencers to publish and create content themselves on Neutrogena's behalf, the brand would have benefited from complimentary content created in-house on Instagram. An appropriate model for this would have been Kate Upton's takeover of Bobbi Brown's Instagram, a series of videos hosted by the model showcasing the brand's products and sharing makeup tips.

Perhaps the best way to assess the success of a specific sponsorship program is to ask whether the campaign was integrated into the consumer's everyday life in such a meaningful way that the brand becomes part of a special and personally-relevant moment in the consumer's life.

