

LA MODE
MONTHLY

TRIBE DYNAMICS

DECEMBER 2014

SKINCARE EDITION

ISSUE 4



TRIBE DYNAMICS

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DECEMBER

EARNED MEDIA VALUE (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.

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've made improvements to our measurement of earned media performance. This report includes these adjustments, with slight variations to the value of specific forms of content. 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.

INTRODUCTION TO DATA

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.

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THE TOP 10

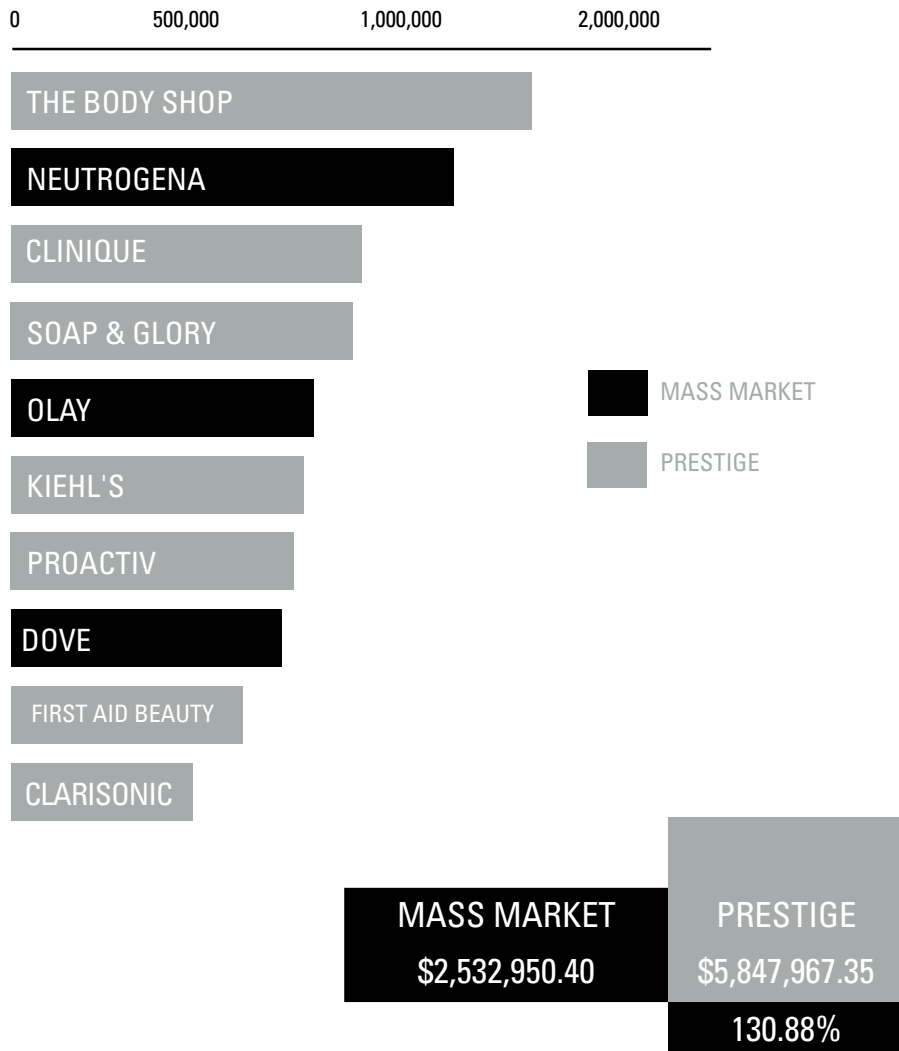
EARNED MEDIA VALUE LEADER BOARD

For the month of
December, 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:	ENGAGEMENT RATE BY:
Blog posts	Blog views
YouTube Videos	Video content views
Tweets	Twitter actions
Facebook posts	Facebook likes, comments, shares
Instagram posts	Instagram likes and comments
Pinterest Posts	Pinterest likes, comments, shares

- 1. THE BODY SHOP**
\$1,486,507.75 EMV
- 2. NEUTROGENA**
\$1,070,922.75 EMV
- 3. CLINIQUE**
\$836,275.50 EMV
- 4. SOAP & GLORY**
\$800,184.80 EMV
- 5. OLAY**
\$746,772.25 EMV
- 6. KIEHL'S**
\$743,888.25 EMV
- 7. PROACTIV**
\$720,291.75 EMV
- 8. DOVE**
\$715,255.40 EMV
- 9. FIRST AID BEAUTY**
\$692,765.80 EMV
- 10. CLARISONIC**
\$568,053.50 EMV



TAKEAWAYS

The Body Shop soared to the top of December's Skincare Top 10 with earned media success on blogs, YouTube, Facebook. On YouTube the brand benefited in particular from seasonal content, videos focused on winter skincare routines, Christmas and Holiday shopping guides, as well as New Year skincare resolutions.

Neutrogena maintained its November social influence with continued success on Instagram, Pinterest, YouTube, and Twitter. It's #NeutrogenaFaceOff Challenge was featured prominently within this content.

Proactiv joined our Skincare Top 10 with incredible brand awareness on Instagram, with enthusiastic customers posting celebratory photos of their skin transformations thanks to Proactiv's line of acne-treatment products.

Soap & Glory excelled on YouTube, its products popular favorites amongst vloggers sharing stocking-stuffer ideas and last-minute holiday gifts. The brand's "Sexy-Mother Pucker" lip treatments were frequently-mentioned favorites.

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 December,
as measured by Earned
Media Value.

BLOG EMV

THE BODY SHOP

\$469,348.00

DOVE

\$267,554.40

NEUTROGENA

\$239,359.00

CLINIQUE

\$229,465.00

KIEHL'S

\$184,524.00

CLARISONIC

\$173,920.00

OLAY

\$128,250.00

SOAP & GLORY

\$93,794.80

DOVE

\$35,325.00

FIRST AID BEAUTY

\$29,629.80



YOUTUBE EMV

SOAP & GLORY

\$619,875.00

FIRST AID BEAUTY

\$577,461.00

CLINIQUE

\$551,900.50

THE BODY SHOP

\$463,784.75

KIEHL'S

\$413,304.25

NEUTROGENA

\$407,458.75

OLAY

\$396,167.25

DOVE

\$368,731.00

CLARISONIC

\$155,813.50

PROACTIV

\$36,251.75



TWITTER EMV

NEUTROGENA

\$64,900.00

THE BODY SHOP

\$63,200.00

PROACTIV

\$62,600.00

OLAY

\$38,000.00

DOVE

\$24,900.00

SOAP & GLORY

\$24,700.00

CLARISONIC

\$19,900.00

KIEHL'S

\$15,600.00

FIRST AID BEAUTY

\$7,900.00

CLINIQUE

\$6,900.00



FACEBOOK EMV

THE BODY SHOP

\$368,590.00

CLARISONIC

\$135,265.00

NEUTROGENA

\$84,310.00

OLAY

\$79,520.00

FIRST AID BEAUTY

\$40,930.00

DOVE

\$25,115.00

KIEHL'S

\$15,165.00

PROACTIV

\$15,080.00

CLINIQUE

\$11,705.00

SOAP & GLORY

\$9,875.00



INSTAGRAM EMV

PROACTIV

\$564,355.00

NEUTROGENA

\$238,460.00

THE BODY SHOP

\$98,985.00

OLAY

\$98,785.00

KIEHL'S

\$96,525.00

CLARISONIC

\$64,425.00

SOAP & GLORY

\$48,660.00

CLINIQUE

\$29,605.00

DOVE

\$24,780.00

FIRST AID BEAUTY

\$15,445.00



PINTEREST EMV

NEUTROGENA

\$37,490.00

THE BODY SHOP

\$23,640.00

FIRST AID BEAUTY

\$21,400.00

KIEHL'S

\$18,770.00

CLARISONIC

\$18,730.00

CLINIQUE

\$6,700.00

PROACTIV

\$6,680.00

OLAY

\$6,050.00

DOVE

\$5,130.00

SOAP & GLORY

\$3,280.00



TAKEAWAYS

Prestige skincare finished out 2014 with a commanding overall earned media performance. The seven prestige brands collectively generated \$5.8M EMV for the month, approximately a 131% difference from the collective EMV of the three mass market brands.

For the first time, prestige brands overwhelmingly led on each of the social channels monitored. The gap between prestige and mass performance was largest on Facebook and Instagram, thanks to the combined success of The Body Shop and Clarisonic on Facebook and Proactiv on Instagram. These EMV discrepancies were smallest for blogs and on Twitter, not by coincidence the two channels with comparatively limited opportunities for meaningful engagement and least correlated with offline sales data.

These trends are representative of the success we've seen prestige brands have on channels like Instagram and Pinterest that allow for more compelling storytelling. Whereas content, both earned and owned, surrounding mass market brands can often be characterized as fleeting, one-off's focused solely on products, prestige brands have had success reaching arguably a larger segment of the beauty community through digital campaigns that encourage continued engagement.

As exceptions to this trend, Neutrogena and Dove have worked to create a richer brand story through ongoing marketing initiatives that have earned them placement in the Top 10. With its sponsorship of the Latin Grammy's Neutrogena, as the number one facial skincare brand amongst Latinas according to the Latin Recording Academy, appealed to a targeted consumer base by supporting an event celebrating Latin culture and values. Similarly, Dove's "Real Beauty Campaign" aims to elevate the inner beauty and self-esteem of women and young girls, a topical issue in the media. The strength these mass market brands have shown in cultivating authentic relationships with specific communities or surrounding worthwhile causes should serve as models for all brands hoping to inspire greater brand awareness and valuable organic content. We will return to these brands and their digital strategies later in this report.

THE TOP 10:

MASS MARKET VS PRESTIGE

The following data

highlights the comparative

EMV performance of

December's Top 10

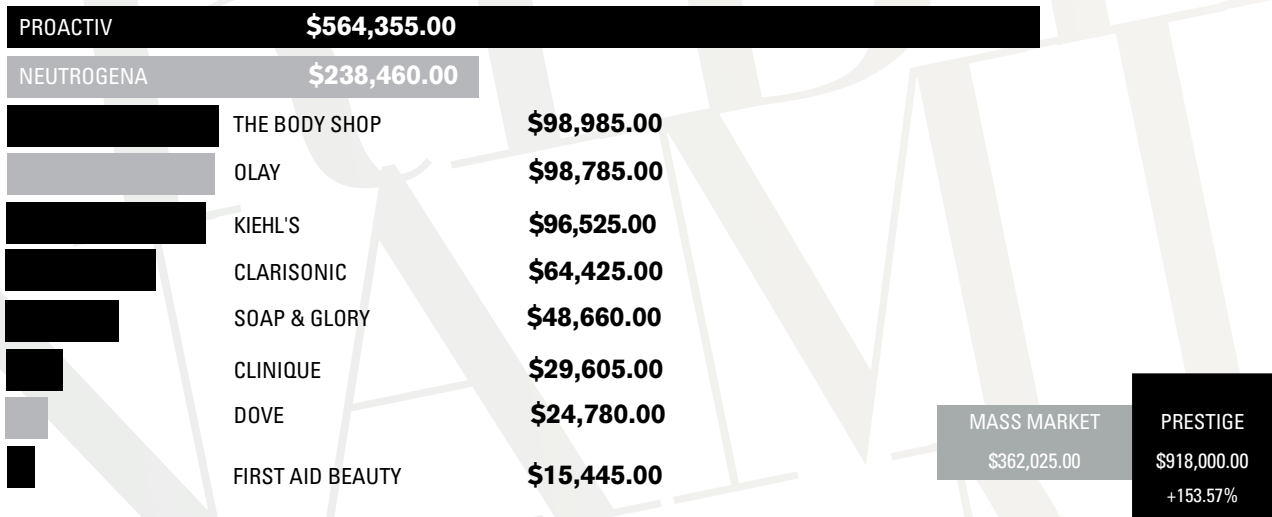
Skincare brands overall

and by channel.

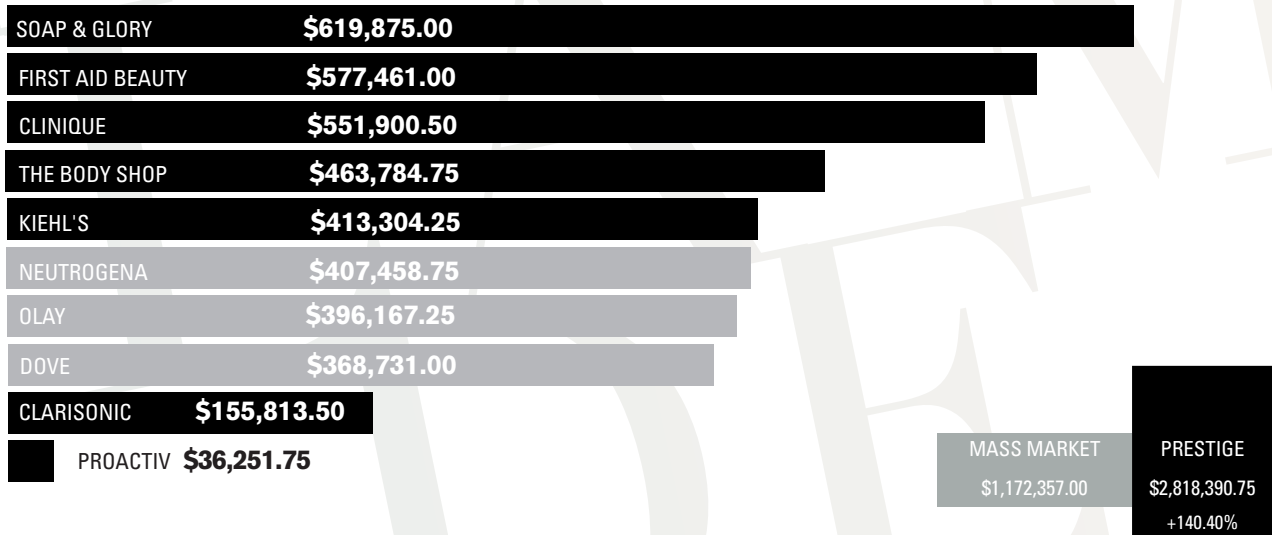
THE TOP 10 - MASS VS PRESTIGE



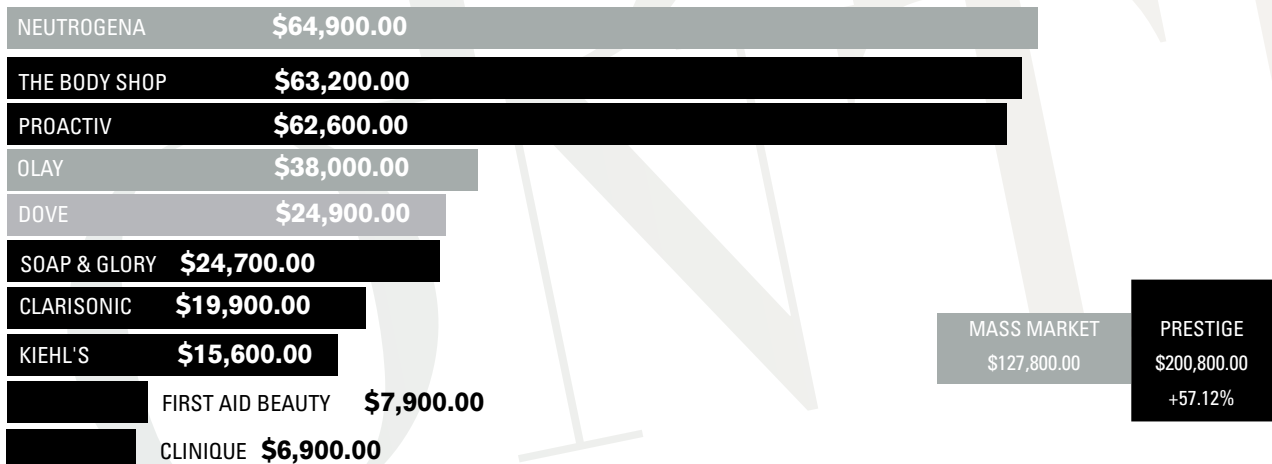
INSTAGRAM



YOUTUBE



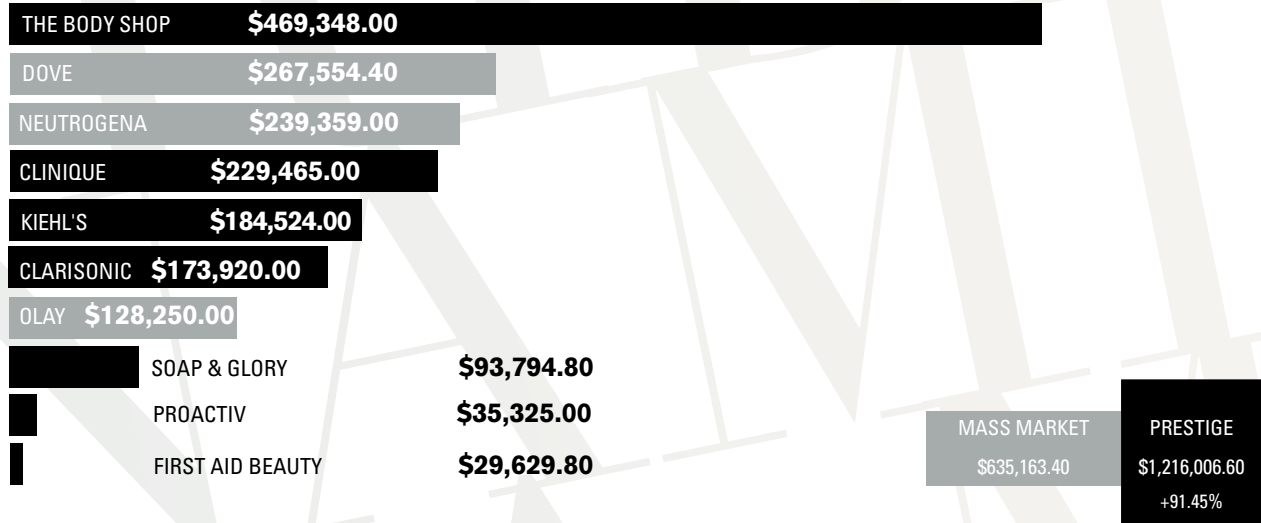
TWITTER



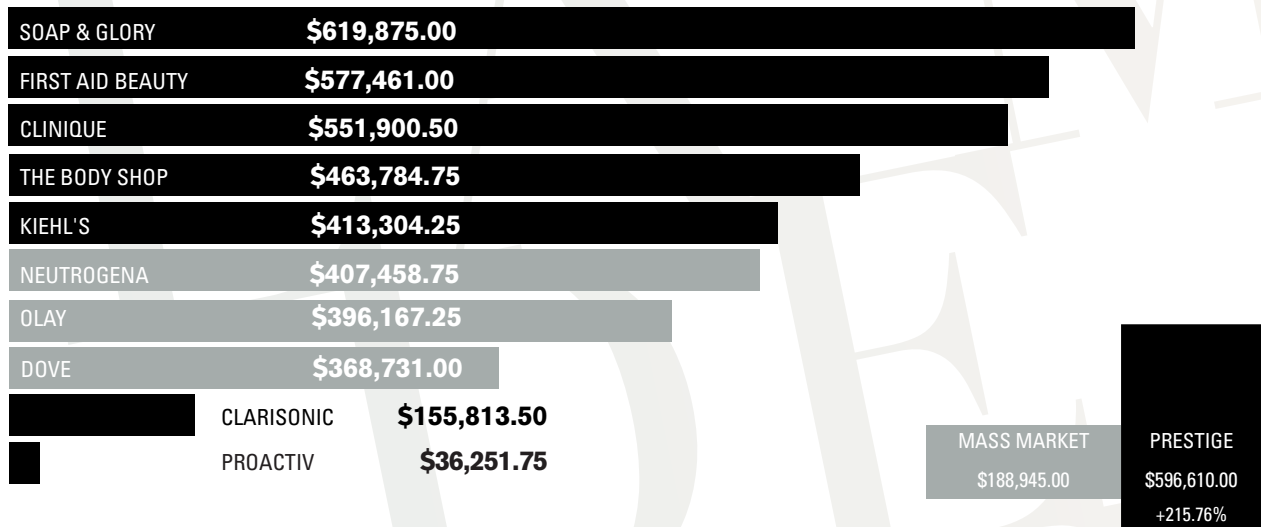
THE TOP 10 - MASS VS PRESTIGE



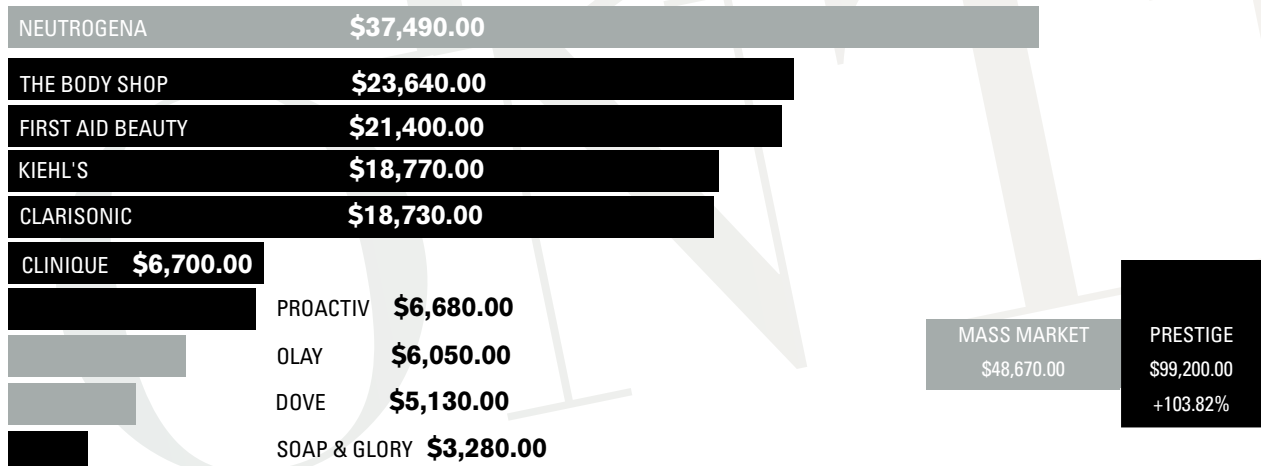
BLOG



FACEBOOK



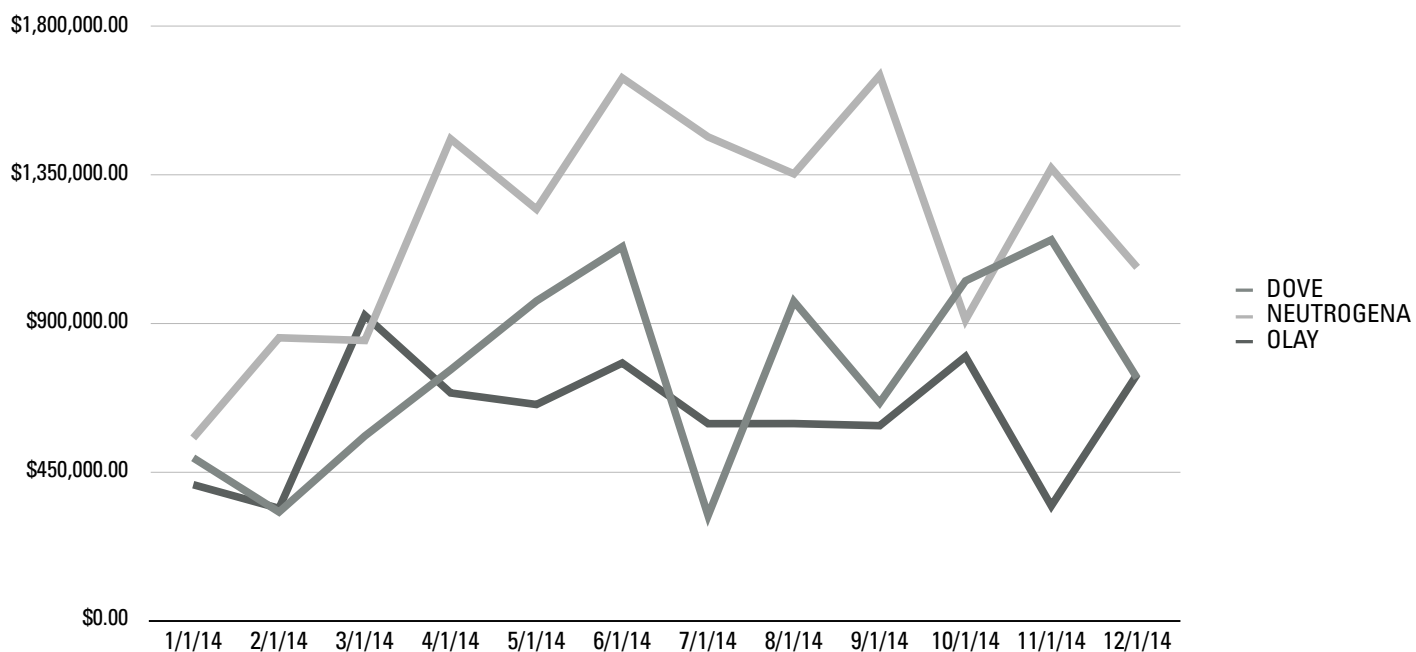
PINTEREST



TRENDING EARNED MEDIA PERFORMANCE: MASS MARKET VS PRESTIGE

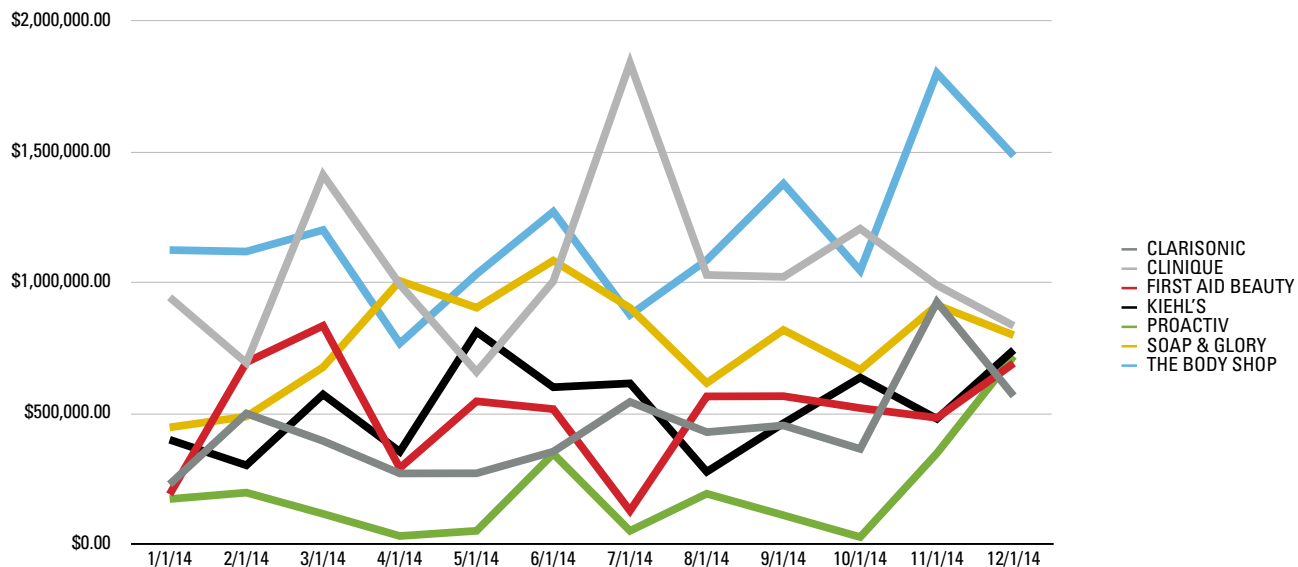
The following data
highlights the trending
EMV performance of
December's Top 10
Skincare brands over the
past three months.

MASS MARKET



MONTH	DOVE	NEUTROGENA	OLAY
JAN	\$493,492.90	\$553,785.55	\$412,140.25
FEB	\$329,358.25	\$857,363.25	\$340,398.80
MAR	\$559,721.35	\$849,204.80	\$925,326.00
APR	\$760,530.35	\$1,459,969.55	\$690,192.55
MAY	\$968,869.00	\$1,247,125.85	\$655,154.25
JUN	\$1,133,254.40	\$1,644,786.60	\$780,889.60
JUL	\$318,575.00	\$1,466,304.00	\$597,061.25
AUG	\$967,780.20	\$1,354,329.80	\$597,347.00
SEP	\$660,396.95	\$1,652,619.40	\$591,005.05
OCT	\$1,029,715.55	\$911,600.85	\$800,667.75
NOV	\$1,154,217.50	\$1,371,391.25	\$348,030.25
DEC	\$735,255.40	\$1,070,922.75	\$746,772.25
TOTAL	\$9,119,921.85	\$14,444,638.65	\$7,487,575.00
MASS OVERALL %DIFF	12%		

PRESTIGE



MONTH	CLARISONIC	CLINIQUE	FIRST AID BEAUTY	KIEHL'S	PROACTIV	SOAP & GLORY	THE BODY SHOP
JAN	\$230,067.50	\$945,210.50	\$191,690.25	\$400,594.05	\$173,846.00	\$447,784.00	\$1,125,880.80
FEB	\$500,980.75	\$694,343.25	\$696,578.75	\$302,764.50	\$198,250.00	\$489,349.00	\$1,120,204.25
MAR	\$395,748.75	\$1,413,162.75	\$836,370.00	\$573,799.75	\$117,134.00	\$677,806.75	\$1,202,574.25
APR	\$271,713.50	\$994,303.00	\$292,304.05	\$354,662.55	\$32,325.75	\$1,007,972.80	\$768,985.50
MAY	\$272,234.50	\$659,900.25	\$547,442.50	\$813,308.80	\$52,177.50	\$905,443.25	\$1,033,884.75
JUN	\$355,050.00	\$1,006,430.60	\$517,639.30	\$601,335.90	\$346,894.30	\$1,085,479.80	\$1,272,670.75
JUL	\$545,167.05	\$1,840,743.25	\$128,931.75	\$615,986.80	\$52,063.50	\$904,806.50	\$877,703.50
AUG	\$429,582.50	\$1,030,621.85	\$566,200.50	\$278,002.10	\$194,059.80	\$617,292.25	\$1,087,633.50
SEP	\$455,086.50	\$1,023,331.60	\$567,075.75	\$463,448.85	\$111,718.75	\$820,268.50	\$1,379,815.05
OCT	\$365,362.00	\$1,207,576.00	\$521,571.50	\$638,202.55	\$28,285.00	\$668,423.80	\$1,047,197.80
NOV	\$927,158.00	\$991,445.50	\$484,259.00	\$480,511.00	\$348,927.00	\$915,365.75	\$1,802,737.60
DEC	\$568,053.50	\$836,275.50	\$692,765.80	\$743,888.25	\$720,291.75	\$800,184.80	\$1,486,507.75
TOTAL	\$5,318,639.55	\$12,646,589.05	\$6,042,829.15	\$6,268,135.10	\$2,387,058.15	\$9,340,177.20	\$14,216,820.30
PRESTIGE OVERALL % DIFF	17%						

TAKEAWAYS

Within December's Top 10, eight brands experienced improvement in overall earned media performance between the first and last six months of 2014. First Aid Beauty and Olay were the exceptions, with slight decreases between Q1/Q2 and Q3/Q4. Despite this, both brands showed greater consistency in month-to-month earned media generation in the second half of the year, whereas exceptional performance in March accounted for the overall greater EMV in the first half of 2014.

Clarisonic and Proactiv showed the most growth, both producing some of their highest EMV sats to date in November and December. The burgeoning success of these brands in particular supports a theory discussed in last month's La Mode: that the wide-availability of information has made product composition (specific ingredients) and associated benefits/solutions primary drivers of consumer purchase decisions as opposed to brand reputation or size.

Collectively both mass market and prestige market segments experienced boosts in earned media performance within December's Top 10. With the help of Dove and Neutrogena, mass market brands together earned a 12% increase in EMV, while prestige brands inspired a jump of 17%. This overarching trend in scaling EMV reflects in many ways growing awareness amongst top skincare brands for the importance of influencer programs and investing digitally.

ANALYSIS

TWO MODELS FOR COMPELLING OWNED MEDIA:

NEUTROGENA AND DOVE

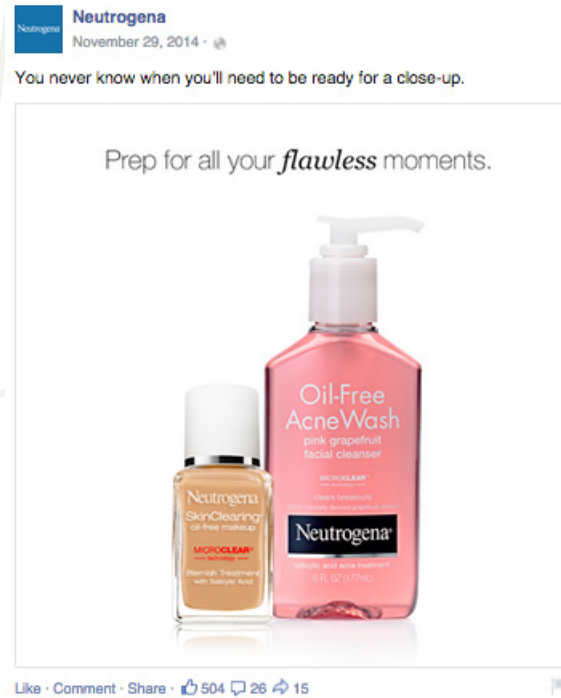
Returning to two of our top performing mass market brands, Neutrogena and Dove stand out for their unique approaches to driving valuable earned media through compelling digital media of their own. Each brand has had success strategically using brand line extensions to enhance desired brand associations that strengthen long term brand equity.

NEUTROGENA: BENEFITS AND CREDIBILITY

If we were to praise Neutrogena for any specific component of its current digital strategy, it would be the way it focuses on benefits and solutions with brand line extensions to establish the credibility and trustworthiness of its brand. To clarify, by brand line extension we are referring to the expansion of a brand into multiple verticals with new lines featuring a variety of products. For instance, in December Neutrogena introduced its Triple Repair haircare line, including a “fortifying” shampoo, conditioner, and leave-in treatment. By moving into a number of personal care verticals, the brand appeals to a greater variety of consumers and new markets. It’s e-commerce experience helps support consumer understandings of Neutrogena’s umbrella of expertise, organized by benefit spanning cleansing and acne, body and bath, suncare, anti-aging, cosmetics, haircare, and finally men’s products.

Neutrogena has been successful with its many brand line extensions because of the balance its digital strategy has struck between consistency and ingenuity with its marketing. The brand produces owned media that is synchronized with established brand attributes, while also creatively showcasing completely new benefits with brand line extensions. This messaging expands the consumer’s perception of the brand’s credibility and trustworthiness across multiple verticals.

Today, the Neutrogena name is commonly associated with reliable, cost-effective products across skincare, cosmetics, haircare, etc. that appeal to a diverse mix of consumers with a range of needs. By focusing on creating a consumer understanding of the brand based on associated benefits, Neutrogena today is arguably one of the most well-recognized and respected personal care brands in its market segment.



DOVE: VALUES AND SOCIAL CAUSES

By contrast, Dove with its own brand line extensions aims to strengthen its brand's association with values including self-confidence, inner and natural beauty, and female empowerment. Most recently, Dove's launch of a new line of curl products centered around #Loveyourcurls, shared messages of self-love and unique beauty, directly involving the consumer by asking them to weigh in on Facebook with what they love most about their own curls.

Dove is looked to as a leader within not only the personal care industry but amongst marketers as well because of its consistent focus on these values and elevation of topical causes with its internal strategy. Regardless of vertical or product, the brand's investment in movements to improve the self-esteem of women and girls, encourages the positive associations that drive cross-vertical purchases from a large pool of consumers.

Dove
Yesterday at 10:44am · 🌐

#BeautyIs the love that families share.



Like · Comment · Share · 1,443 8 291

Dove
January 26 at 2:56pm · 🌐

When you love your curls, that confidence is passed on to the next generation. Who inspired you to #LoveYourCurls?



#LoveYourCurls



Like · Comment · Share · 324 29 15

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