

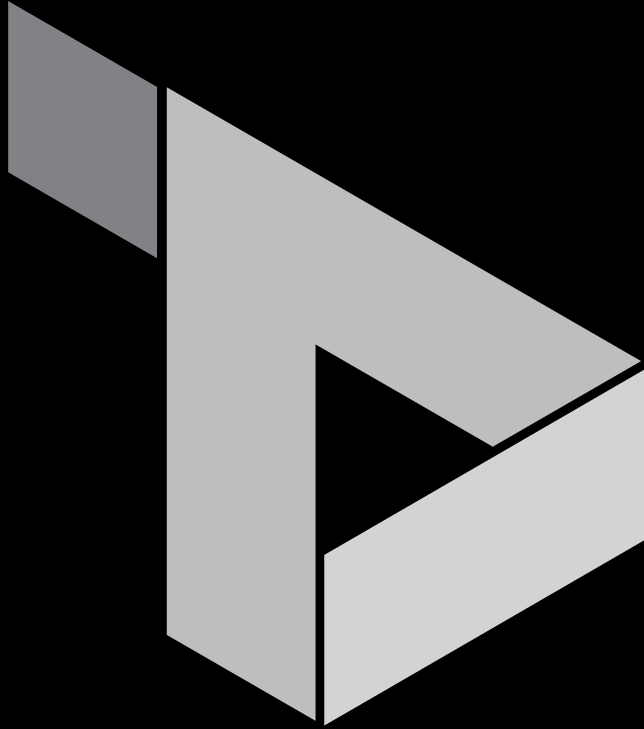
LA MODE MONTHLY

TRIBE DYNAMICS

MARCH 2015

SKINCARE EDITION

ISSUE 7



TRIBE DYNAMICS

DATA ANALYSIS: CHRISTINA GOSWILLER

DESIGN: JORDYN ALVIDREZ

MARCH

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. We have created these reports to 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 generating the most valuable earned media over time, visibly outperforming the competition on a variety of social channels.

The data for this study was collected by Tribe Dynamics, and drawn from the top 50,000 influencers in the beauty, fashion, and lifestyle spaces. The brands and products included in each month's study are those that we have determined the most popular, informed by publicly available information on brand annual revenues, and reviews from consumers and third-party retailers.

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

*Please note, the brands included in our La Mode Monthly Skincare reports are those offering primarily skincare products within the larger beauty industry.

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.

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THE TOP 10

EARNED MEDIA VALUE LEADER BOARD

For the month of March
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 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 \$1,689,599 EMV
2. THE BODY SHOP \$1,460,524 EMV
3. CLINIQUE \$1,392,438 EMV
4. CLARINS \$1,114,181 EMV
5. MURAD \$1,109,972 EMV
6. SOAP & GLORY \$1,046,450 EMV
7. BURT'S BEES \$989,472 EMV
8. DOVE \$779,903 EMV
9. KIEHL'S \$711,483 EMV
10. BIORE \$668,595 EMV

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



MARCH IN REVIEW

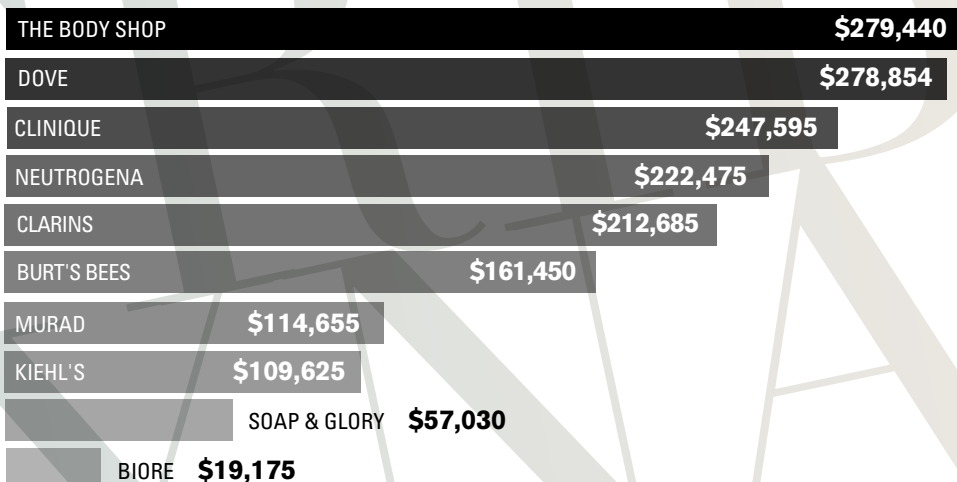
March earned media demonstrated the importance of embracing diversity when targeting customers, both in terms of widening scope -- reaching out to audiences beyond the U.S. -- and in terms of recognizing specific communities that have previously been less represented in the beauty industry. Neutrogena's continued high performance was owed to their sincere and long-standing engagement with the Latina community. The brand has built a meaningful, lasting relationship among the growing Hispanic consumer base through their commitment to elevating voices from the Latina blogger community. Most notably, Neutrogena's involvement in the #WeAllGrowSummit in late February communicated just how personal the growth of this community was to the company. Michele Freyre, the General Manager of Neutrogena, shared her honest experience as a Latina professional in the industry as the keynote speaker. Freyre also announced Eiza Gonzales as the new Neutrogena ambassador. Notably, the Mexican singer and actress is going to be featured in the general market, not just towards the Hispanic market. By supporting and participating in this summit, Freyre in effect enacts the Latina Bloggers Connect motto, "We are #LatinaBloggers and #LatinaCreators building a community of authentic voices and connections. When one grows, we all grow."

THE TOP 10

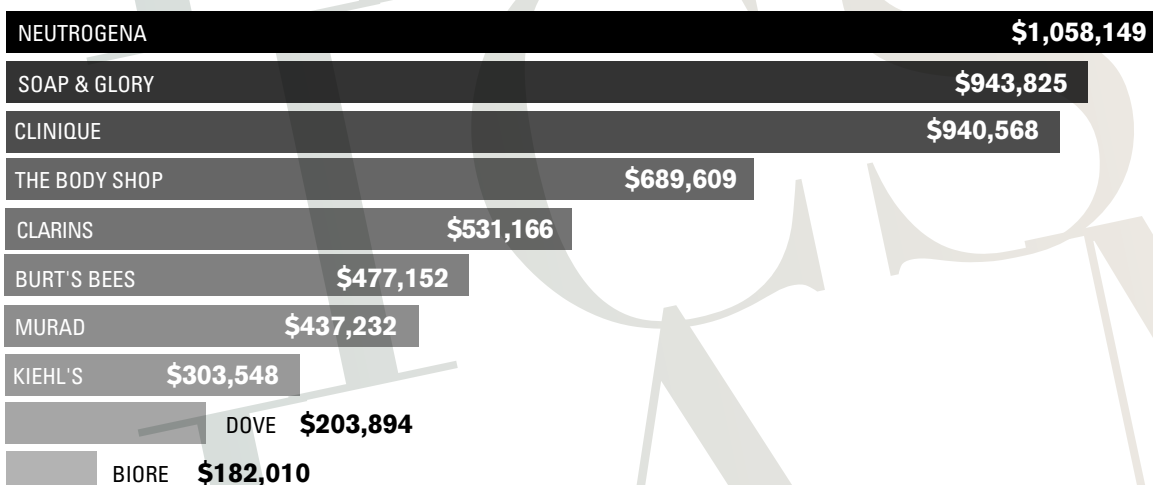
**EARNED MEDIA VALUE
PERFORMANCE BY CHANNEL**

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

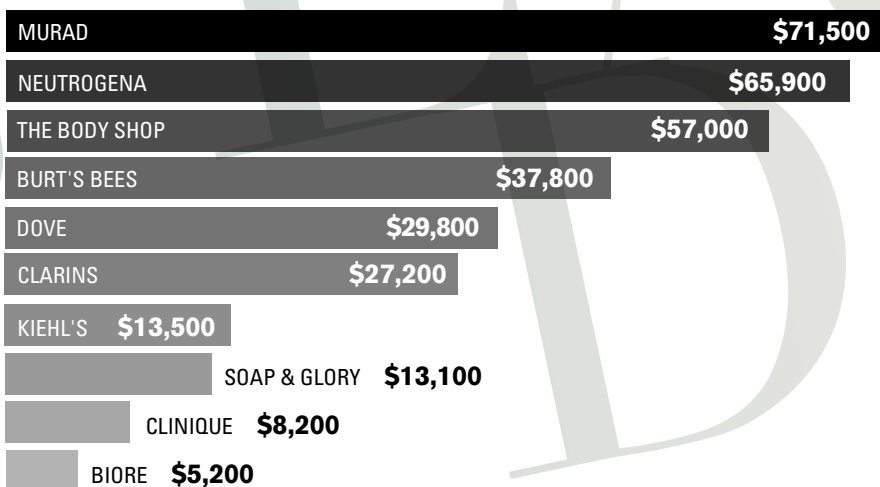
BLOG



YOUTUBE



TWITTER

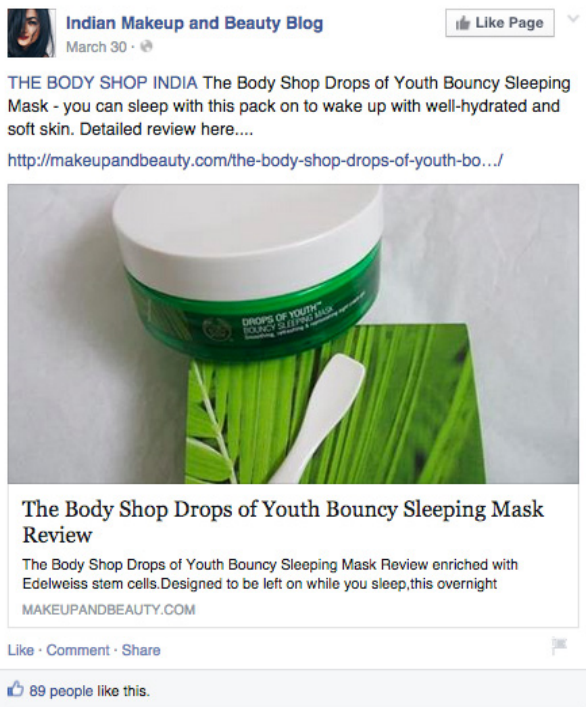


THE BODY SHOP'S INTERNATIONAL PRESENCE

The Body Shop's success on both Facebook and YouTube stems from global awareness for both its brand and new products. On Facebook, prominent to mid-tier bloggers shared product reviews with their online communities, tagging The Body Shop's foreign subsidiary. Although these posts never explicitly addressed the nationality of followers, the specific tags extended awareness for The Body Shop amongst a more diverse collection of online networks.

If we were to assess the reach of this Facebook content, the greatest value came from the brand being included in conversations amongst like-minded, targeted groups of consumers. The Indian Makeup and Beauty Blog shared a detailed review of The Body Shop's Drops of Youth Bouncy Sleeping Mask with its 2.8M Facebook followers. Glossybox Sweden ran a Facebook contest giving away a body butter product from The Body Shop. Entry required followers to like and share the post with friends.

While these examples are more extreme based on publisher size and follower count, they speak to the traction that The Body Shop is gaining through a widespread relevance with an international focus.



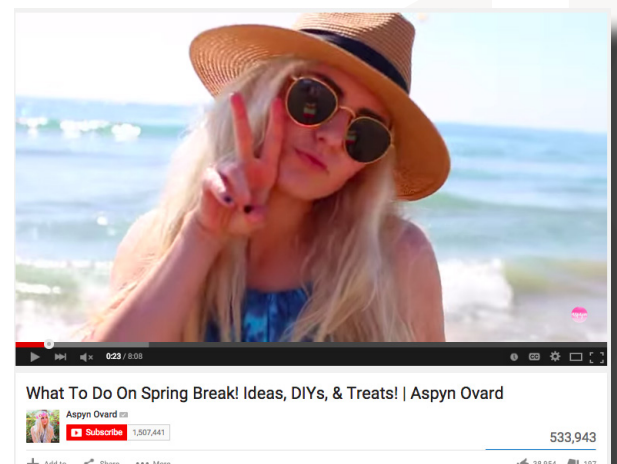
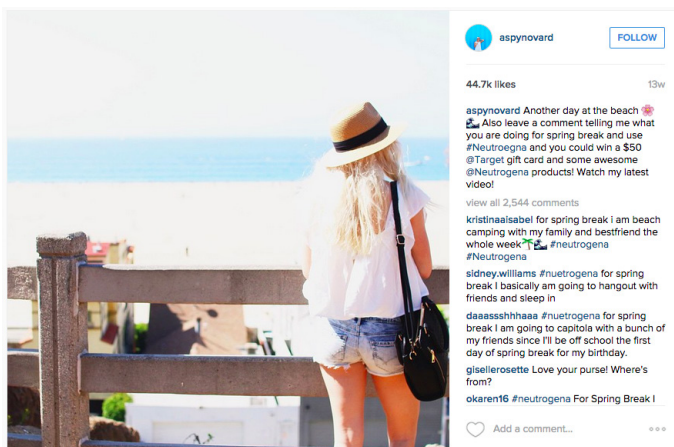
NEUTROGENA'S YOUTHFUL PERSONALITY SHINES ON YOUTUBE

On YouTube, Neutrogena's personality as depicted by vloggers echoed the brand's concerted attempt to achieve a vivacious and youthful voice attractive to the millennial consumer. Neutrogena was frequently mentioned in videos appealing to the interests of a younger demographic, including "spring essentials" and "festival beauty" themed tutorials.

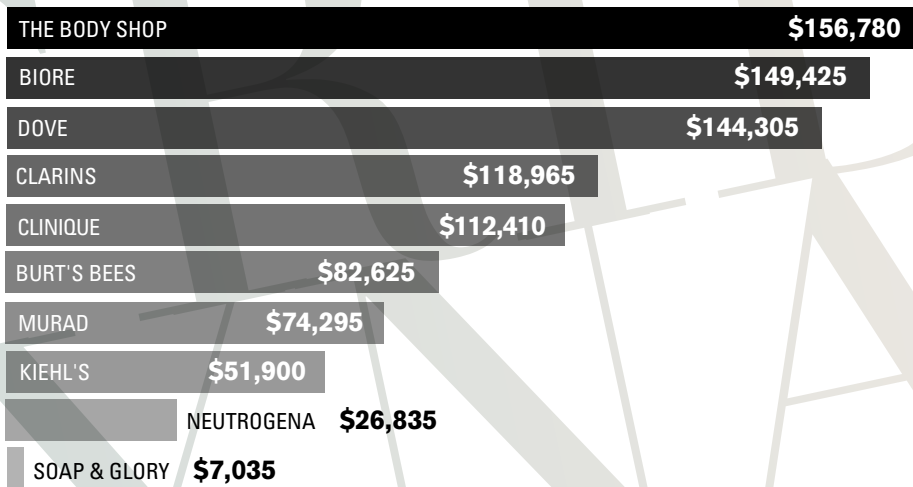
Despite the breadth of its collections and innovation at a product level, older Neutrogena staples like its Makeup Remover Wipes were more frequently included in videos with higher engagement. The wipes in particular were a popular choice with the indie-chic Coachella girl, wanting to make the most of her festival experience without sacrificing a healthy skin regimen.

Influencer Aspyn Ovard, age 19, created a significant amount of valuable content for Neutrogena that embodied the millennial wanderlust fantasy, with images of herself at the beach or in other desirable settings. The influencer occasionally ran Neutrogena giveaways within this context, in one instance asking followers to leave a comment about their spring break plans with #Neutrogena. The call-to-action required minimal effort, which resulted in 2,554 comments and 44.4K likes for the single post.

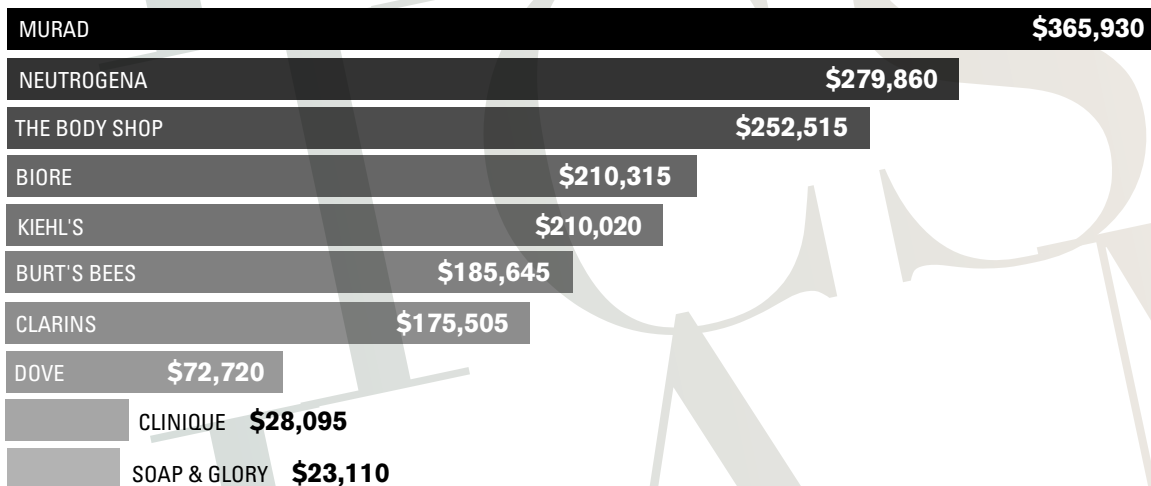
Although much of this content was less valuable as a discovery tool for newly launched products, it illustrated a deeper connection being drawn in the minds of vloggers between Neutrogena, its products, and a desirable trendy and active lifestyle.



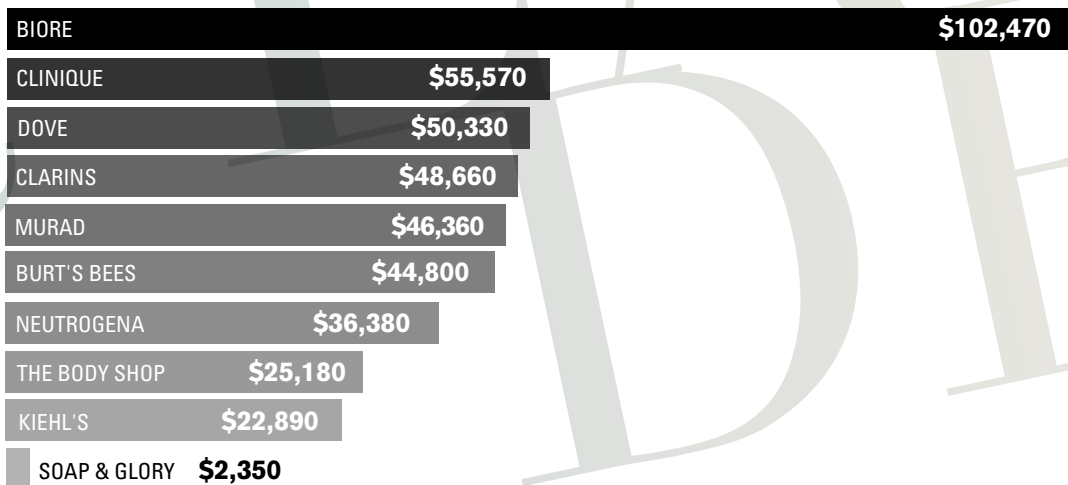
FACEBOOK



INSTAGRAM



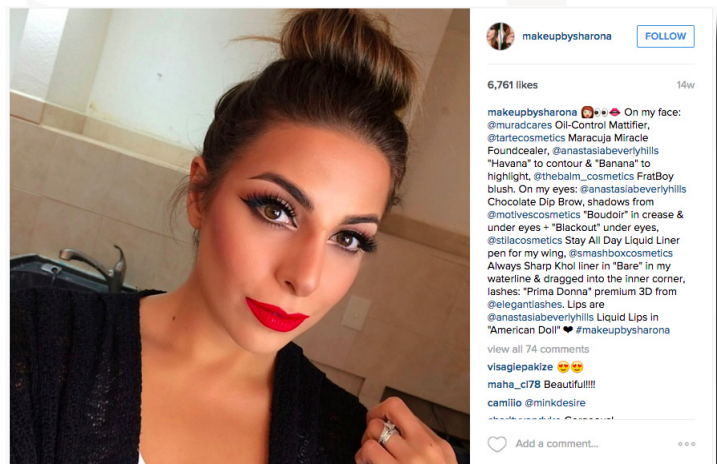
PINTEREST



MURAD INVISIBLUR ORGANICALLY PROMOTED ON INSTAGRAM

Murad's influencer program continues to drive meaningful product discovery and general brand awareness on Instagram. Influencers gushed over the generous amount of product included within each product send, sharing pictures of the box and various products. In one instance, Murad appealed to the influencer for feedback on one product in particular, the new Invisiblur Perfecting Shield. Framed within a personalized, handwritten letter, the request was perceived as genuine interest in the individual's opinion as opposed to a promotional call-to-action. The intimacy of the experience inspired organic content that made Invisiblur stand out against the background of the greater product send. Murad achieved product discovery and endorsement of its newly launched product by making the box about the influencer, as opposed to the product.

In terms of more general awareness for Murad, the brand's presence in #MOTD or #LOTD Instagram posts substantially increased in March. The brand was frequently included in glam selfies of an editorial quality as one of the only skincare products in a color cosmetic-heavy routine. Top influencers, whose favorite brands include Anastasia Beverly Hills and MAC, established an association between Murad and prestige cosmetic brands and products. The tone of posts from influencers like Evita Polizzi (60K followers), implied that Murad's primer was essential for forming the flawless base on which she could create these beautiful professional makeup looks. The association proved powerful, as the number of these posts grew quickly between January and March.



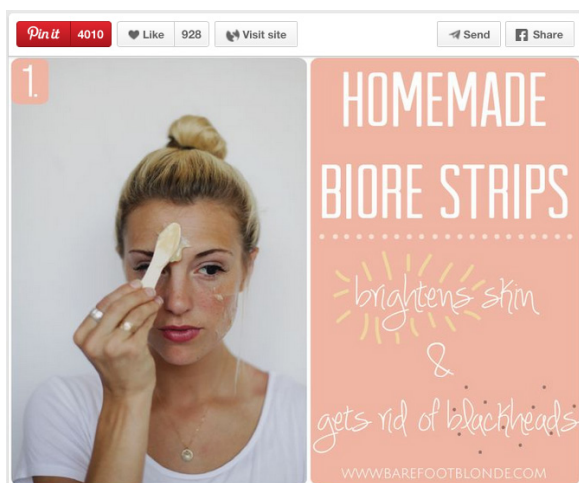
BIORE ON PINTEREST AND THE HOMEMADE BEAUTY MOVEMENT

Biore benefited from content creation similar to what was discussed with GlamGlow last month. Awareness for Biore on Pinterest was driven by a single hero product: Biore Blackhead Strips. One related post in particular reached viral status in number of pins, likes, and shares. Based on a blog post originally published in 2010, the Pinterest post included a step-by-step DIY tutorial for creating DIY blackhead strips at home.

It may seem counterintuitive to argue that this content would drive greater awareness and sales for Biore. However, collectively these posts speak to the strength of the perceived connection between blackhead strips and Biore. This familiarity has established the brand as the standard provider of pore strips, similar to how Kleenex is the most well-recognized tissue brand.

Diving deeper, the repeated appearance of these DIY product duplicate posts runs parallel to the perceived shift in consumer preferences. This emerging “homemade beauty movement” rests on the wide availability of information and expertise online to anyone interested in creating products at home over buying name-brand options.

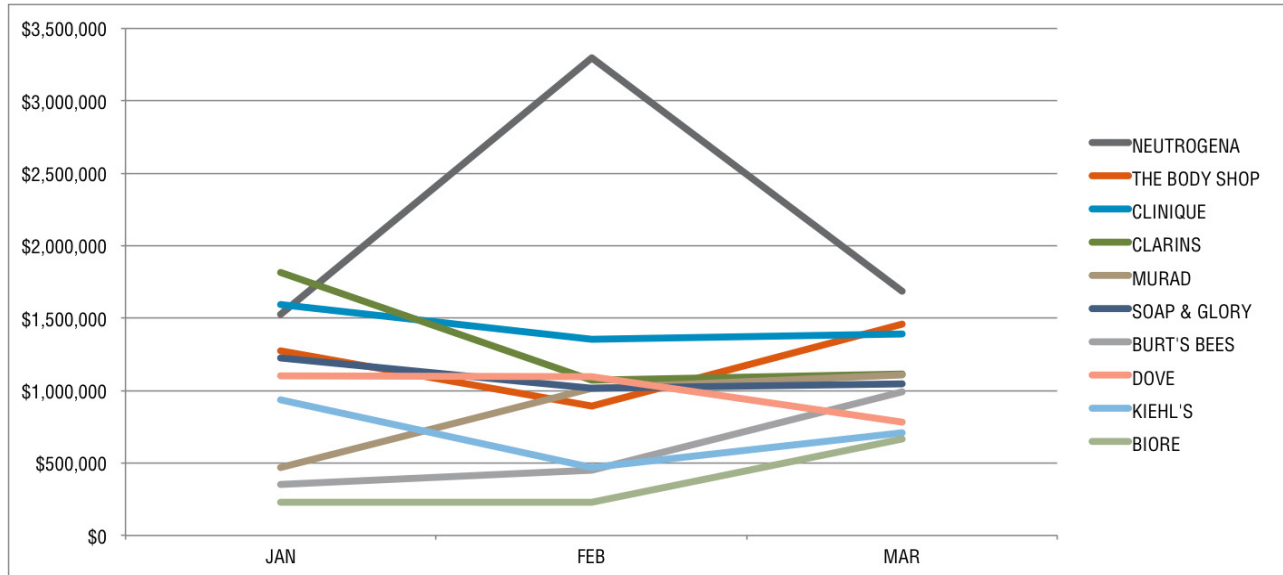
The homemade beauty movement is attractive to consumers for two main reasons. First, taking on the process themselves effectively grants individuals full visibility into the ingredients that make up a product. In the DIY Biore post, only two ingredients were required, both of which were natural and fairly accessible to the everyday beauty enthusiast. Second, it allows for customization. Returning to the Biore example, notes were included throughout the instructions addressing adjustments for different application techniques and alternatives for unavailable ingredients or tools. Together, these factors empower the consumer to determine the details of her own experience of a treatment or regimen. With this in mind, marketers must thoughtfully consider what their brand offers that outweighs the pros of less expensive, homemade alternatives.



TRENDING EARNED MEDIA PERFORMANCE

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

TRENDING EMV PERFORMANCE



BRAND	JAN	FEB	MAR	TOTAL
NEUTROGENA	\$1,526,110	\$3,297,015	\$1,689,599	\$6,512,725
THE BODY SHOP	\$1,274,064	\$891,887	\$1,460,524	\$3,626,475
CLINIQUE	\$1,595,443	\$1,354,363	\$1,392,438	\$4,342,244
CLARINS	\$1,817,895	\$1,072,094	\$1,114,181	\$4,004,169
MURAD	\$467,976	\$1,013,712	\$1,109,972	\$2,591,660
SOAP & GLORY	\$1,223,596	\$1,014,310	\$1,046,450	\$3,284,355
BURT'S BEES	\$350,301	\$449,580	\$989,472	\$1,789,353
DOVE	\$1,103,603	\$1,096,126	\$779,903	\$2,979,633
KIEHL'S	\$939,418	\$468,231	\$711,483	\$2,119,132
BIORE	\$227,651	\$232,147	\$668,595	\$1,128,393

ANALYSIS

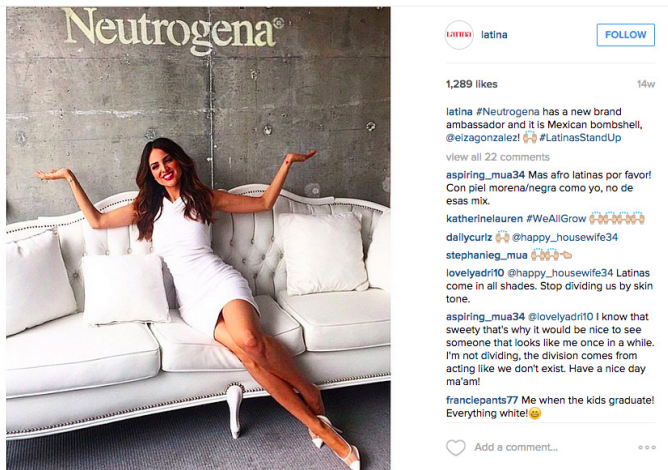
THE NEUTROGENA EXPERIENCE:

**CUSTOMIZED STRATEGY &
COMMUNITY-SPECIFIC RELEVANCE**

Marketing strategies that pivot around ethnicity and race may immediately raise red flags for any marketer, yet customization and specialization are popular topics within digital marketing conversations.

A significant portion of Neutrogena's success, both earned media and sales, is owed to the brand's self-substantiated association with and involvement in the Hispanic community. Neutrogena's marketing strategy is one of the few to effectively introduce ethnically or culturally relevant initiatives without marginalizing universal appeal. This is owed to their thoughtful and sincere engagement with specific individuals, namely within the Latina blogger community, instead of depending on exploitative tactics.

It's important to understand that the strength of this association is one that takes place naturally over time alongside informed marketing campaigns. Neutrogena's thoughtful approach can be segmented into three levels of engagement opportunities that have successfully established the authenticity of its relationship with the Hispanic community. These levels are drawn out below from least engagement to most engagement.



"THE CONNECTIONS WILL ALSO BE STRATEGICALLY CREATED FOR MARKETERS, PR PROFESSIONALS AND BRAND REPRESENTATIVES TO CONNECT WITH YOU — THE KEY INFLUENCERS — AND HELP ALL ACHIEVE OUR OBJECTIVES, BECAUSE WE DO GROW TOGETHER."

- LATINA BLOGGERS CONNECT

STRATEGY - THREE LEVELS OF ENGAGEMENT WITHIN THE HISPANIC COMMUNITY

1. POINT OF PURCHASE

At the bottom level we have the most basic form of brand-to-consumer engagement: the one that takes place at point of purchase. To put it succinctly, in order to succeed at this level (measured by conversion rates), brands must first identify the dynamics of how their target group of consumers makes purchase decisions and interacts with the physical product itself.

At point of purchase, Neutrogena relies on primarily visual cues to stress its commitment to the Hispanic community. In both advertorial materials and on its e-commerce website, the brand integrates a mix of English and Spanish to establish a sense of comfort right off the bat, shifting the focus to the individual and acknowledging a primary component of his or her identity. There is a delicate balance here that Neutrogena acknowledges and is still exploring. For instance, as part of an A/B test, a select group of visitors to Neutrogena's site are welcomed by a pop-up written almost entirely in Spanish. It is as if the company is saying, "We care enough to speak to you in a language you use at home."

While it may seem obvious, brand messaging in-store or online that specifically nods to the consumer's ethnic heritage adds legitimacy to the secondary association. A subconscious connection is made that meaningfully positions the brand as respectful of not just the individual's identification with the community, but also what it means to belong to the group itself.

2. DIRECT CONTACT

A large part of Neutrogena's strategy revolves around moments of direct contact with influencers and fans. The brand has showed its strength at this level multiple times in the past year, from its sponsorship of the Latin Grammys, to the elevation of Dulce Candy at the Academy Awards, to most recently the sponsorship of the We All Grow Summit, which was hosted by Latina bloggers, in Los Angeles.

With each of these initiatives, Neutrogena oriented its brand around a specific cause or individual to make for a compelling brand-consumer interaction that could be shared with a larger audience online. Cause-based marketing and sponsorship, more specifically, characterizes the brand as a benevolent and nurturing participant in community promotion. By focusing on the stories of individual Latina beauty influencers like Dulce Candy, Neutrogena is able to create a lasting connecting between its brand and the values shared by the larger Hispanic community.

3. HIGHER-LEVEL CONNECTION

The third and final element of Neutrogena's strategy is the brand's more abstract resonance alongside values, images, and goals that are important to the Latina beauty community. In February, Neutrogena sponsored the We All Grow Summit. Hosted by Latina Bloggers Connect, the summit offered hands-on workshops, inspirational keynote speakers, dance parties, learning field trips, bonding sponsor dinners, and mentor workshops. With the mantra "inti-



mate, hands-on, relevant, and immersive,” keynote speakers focused on education and growth, sharing their experiences and engaging the audience to help address remaining discrepancies within the industry.

In attendance were Neutrogena’s newest brand ambassador, Eiza Gonzales, as well as Dulce Candy, both of whom contributed to the discussion by sharing their unique journeys as Latina women in the beauty industry. Both influencers also actively helped spread the branded hashtag #mismomentosneutrogena, which was used to give online followers an intimate backstage experience.

Neutrogena’s implicit involvement in these poignant conversations gave interested fans and consumers greater reason to remain loyal to the brand. Beyond a mere association with the community, Neutrogena’s public endorsement and elevation of the Latina blogger community and its mission created a higher-level emotional connection to a network of women growing in influence.



TRIBE DYNAMICS

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739 BRYANT ST., SAN FRANCISCO, CA 94110