

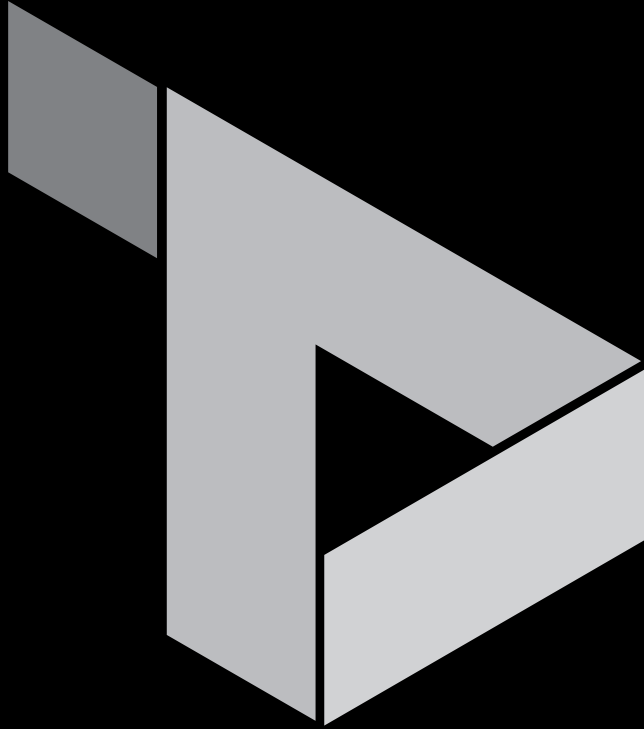
LA MODE MONTHLY

TRIBE DYNAMICS

APRIL 2015

SKINCARE EDITION

ISSUE 8



TRIBE DYNAMICS

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APRIL

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 Cosmetics reports are those offering primarily color cosmetics 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 April
the following 10 Skincare
brands were the most
socially influential,
generating the most
valuable earned media.

THE TOP 10 - EARNED MEDIA VALUE LEADER BOARD

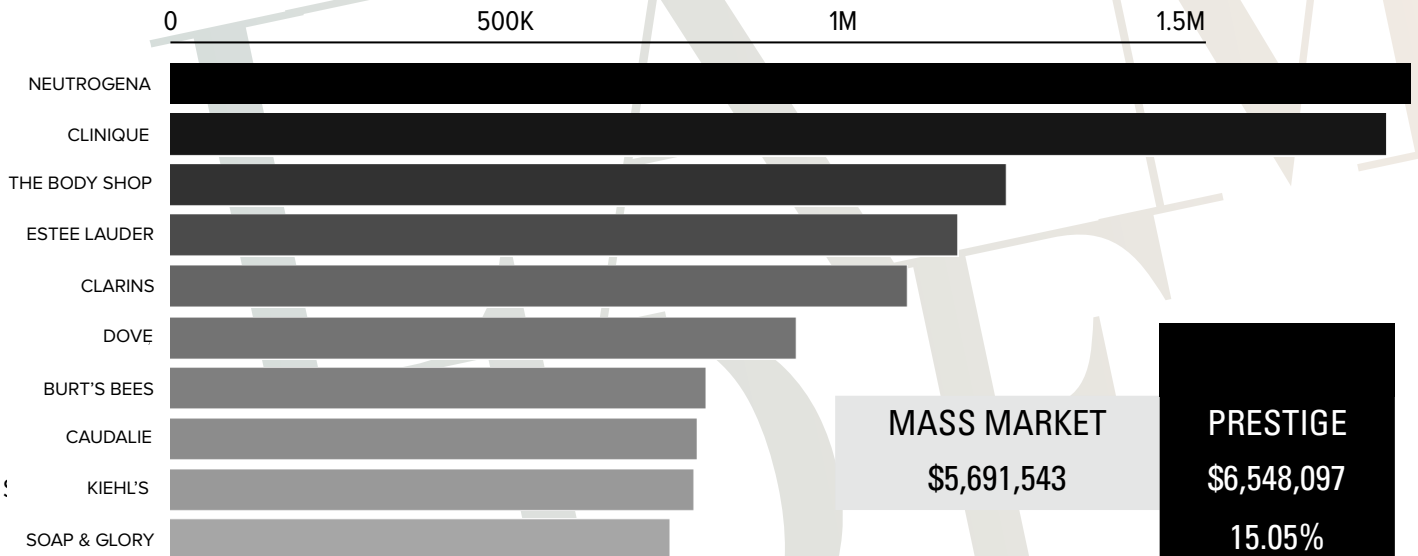
THE NUMBER OF POSTS:

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 \$1,894,748 EMV
2. CLINIQUE \$1,827,700 EMV
3. THE BODY SHOP \$1,790,292 EMV
4. ESTEE LAUDER \$1,230,373 EMV
5. CLARINS \$1,158,224 EMV
6. DOVE \$1,084,968 EMV
7. BURT'S BEES \$921,535 EMV
8. CAUDALIE \$787,538 EMV
9. KIEHL'S \$774,565 EMV
10. SOAP & GLORY \$769,697 EMV



THE TOP 10 - EARNED MEDIA VALUE LEADER BOARD

By contrast to cosmetic brands, there has traditionally been a smaller discrepancy in earned media performance between prestige and mass market skincare brands. April's La Mode Top 10 Skincare, however, substantiated a similar trend within the vertical.

However, although the 152% lead prestige cosmetics brands carried over mass cosmetics in April is still a long way off, similar patterns in earned media performance by segment are beginning to emerge in Skincare. Despite the impact of digital innovator Neutrogena, the 152% lead prestige brands carried over mass market represents a noteworthy shift in the dynamics between the two segments. Not only was the fluctuation significant, it happened at an exceptional rate considering the 3% and 29% leads that mass enjoyed in March and February, respectively.

The disparity between mass market and prestige raises compelling questions about whether one segment's brands have more successfully adapted their strategies to new wave marketing trends that pivot around holistic lifestyle connections. How do the strategies and patterns of success differ between brands in these two camps -- not only in terms of EMV, but also in style and purpose as they relate to authenticity of messaging, and activating target influencers?

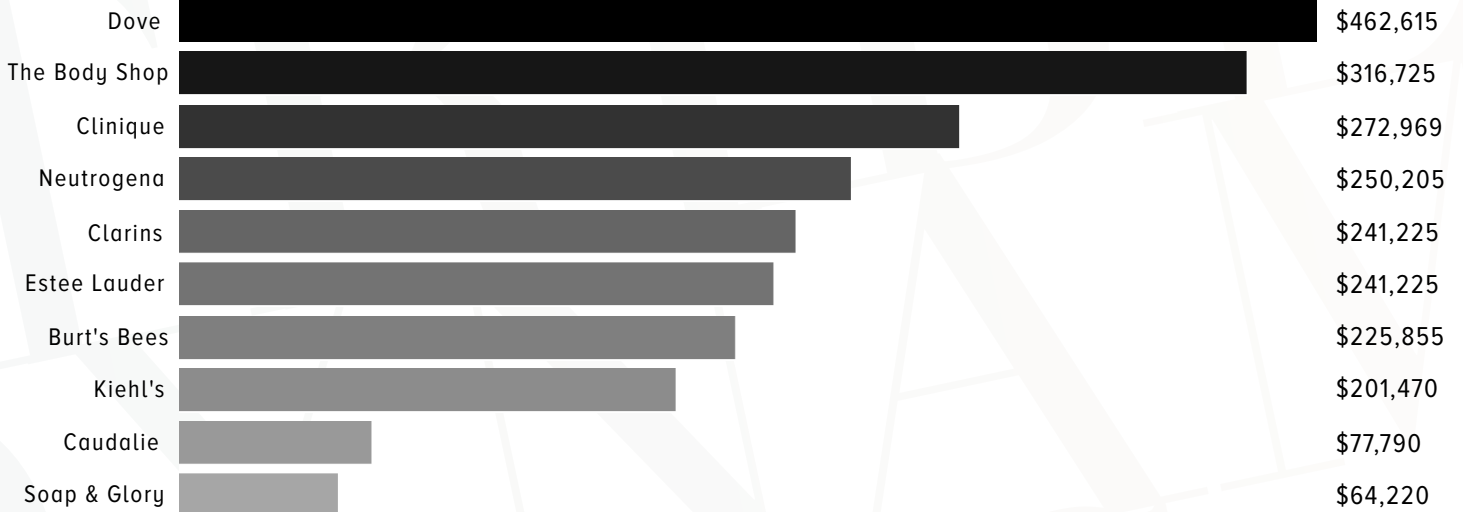
THE TOP 10

**EARNED MEDIA VALUE
PERFORMANCE BY CHANNEL**

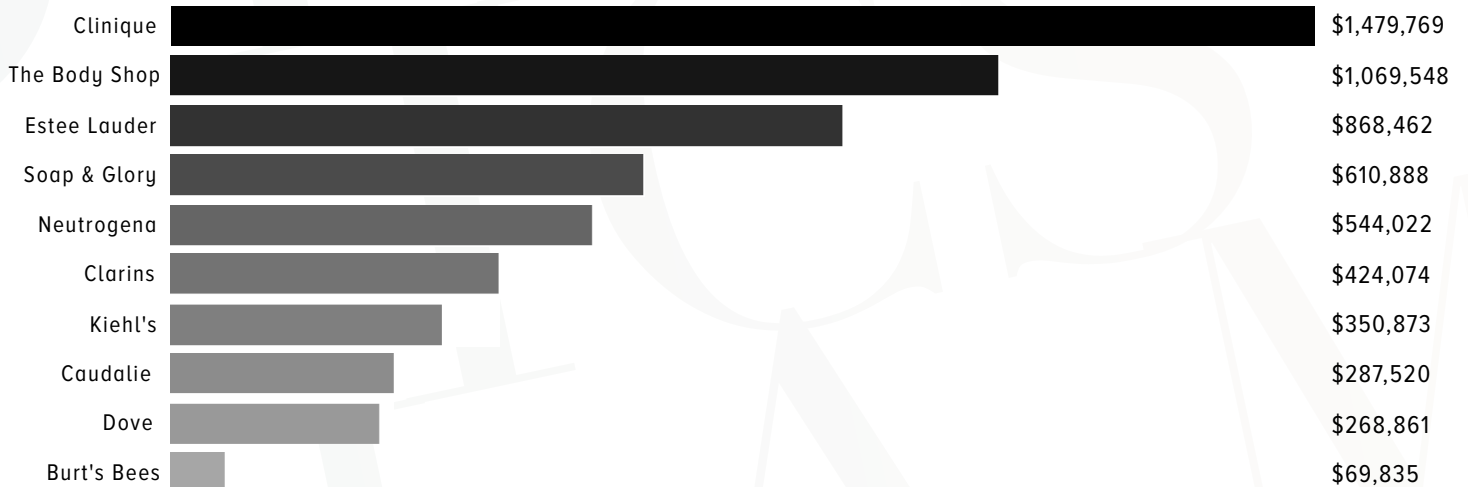
The following data
reflects the approximate
value of the content
created about each brand
by social channel during
the month of April, as
measured by Earned
Media Value.

THE TOP 10 - EMV BY SOCIAL CHANNEL

BLOG



YOUTUBE



TWITTER



MULTITASKING PRODUCTS AND LIFESTYLE ASSOCIATION DRIVE CLINIQUE'S YOUTUBE PRESENCE

Clinique experienced a surge in April EMV thanks to burgeoning awareness for its brand on YouTube. Endorsements were not motivated by a single product or theme; rather, Clinique products were popular inclusions within both product review and spring haul videos. High-engagement videos Clinique highlighted a developing trend in the content being created on the channel. Increasingly, there is a merging of cosmetics, skincare, fashion, wellness within these videos, as vloggers include a wide range of products spanning a growing number of verticals. For the month, some of the most-viewed videos were those that incorporated products, style suggestions, themes from each of these in conversations reflecting a realistic balance of interests.

The distinction between exclusively skincare or cosmetics brands is ebbing, as brands like Clinique adopt value propositions bent on multitasking products. With the launch of skin health-conscious primers and nutrient-enriched lipsticks, many skincare brands are purposefully sharing messages that re-cast them as “beauty” brands.

While differentiation may be more a challenge for these brands, the videos showcasing these new multitasking products are compelling because vloggers show exactly where each product fits into her daily routine, start to finish, and how they work together to service longer lasting makeup and healthy skin.



BURT'S BEES' STRATEGY SHOWS PERKS AND PITFALLS OF SPONSORSHIP

Burt's Bee's was an active participant in its own earned media growth in April. The brand's #28daychallenge created a compelling call to action for engagement around the release of the brand's Renewal Face Care line.

Partnering with a handful of bloggers, the brand sponsored these women's participation in the 28 Day Challenge, using the Renewal line each day to work in harmony with the skin's natural regeneration cycle that takes place every 28 days. Influencers encouraged their followers to join them in taking the challenge, who in admiration of the influencer's commitment shared these original posts amongst friends.

There's no doubting the substantial engagement rates these post received; 7 of the 10 most valuable posts mentioning Burt's Bees promoted the 28 Day Challenge. The brand's EMV growth across the board proves that the initiative successfully sparked conversations amongst target influencers and their communities. The challenge was directly responsible for helping Burt's Bees snag the leading spot on Pinterest and third on Instagram, generating approximately \$45.3 in EMV for the month.



That being said, the long term impact of the 28 Day Challenge for Burt's Bees may be more suspect. Sponsored campaigns like this one, despite immediate spikes in content creation, are not necessarily conducive to sustainable conversations and connections with influencers. Burt's Bee's lead in sponsored EMV for April, approximately \$308K, suggests that sponsorship has played a central role in the brand's digital strategy.

There are a number of factors limiting the value add of sponsorship as it relates to both influencer and consumer perceptions of the brand. The sheer implications of asking and paying an influencer to post about a product sets the tone for the relationship between the brand and the individual. Once they have fulfilled their responsibility, there's nothing substantive keeping them attached to the product or brand. Without a more meaningful connection, there's far less of a chance that the influencer will post about the brand in the future without a monetary incentive.

This feeds into reasons why a consumer may be less motivated to make a purchase or follow a brand once they realize the content is sponsored. All of the 7 valuable posts mentioning the 28 Day Challenge were sponsored. Each post shared a link to the influencer's blog, where the content was almost identical with word-for-word similarities, no doubt phrases the brand had asked influencers to incorporate like: "I am doing a 28 Day Challenge with Burt's Bees Renewal Face Care line and you should totally join in... natural skincare products that renew and firm...in 28 days you'll see firmer, smoother, healthier-looking skin." Additionally, each blog post began with some version of the same hook, sharing "the little known factoid" that skin renews itself every 28 days.

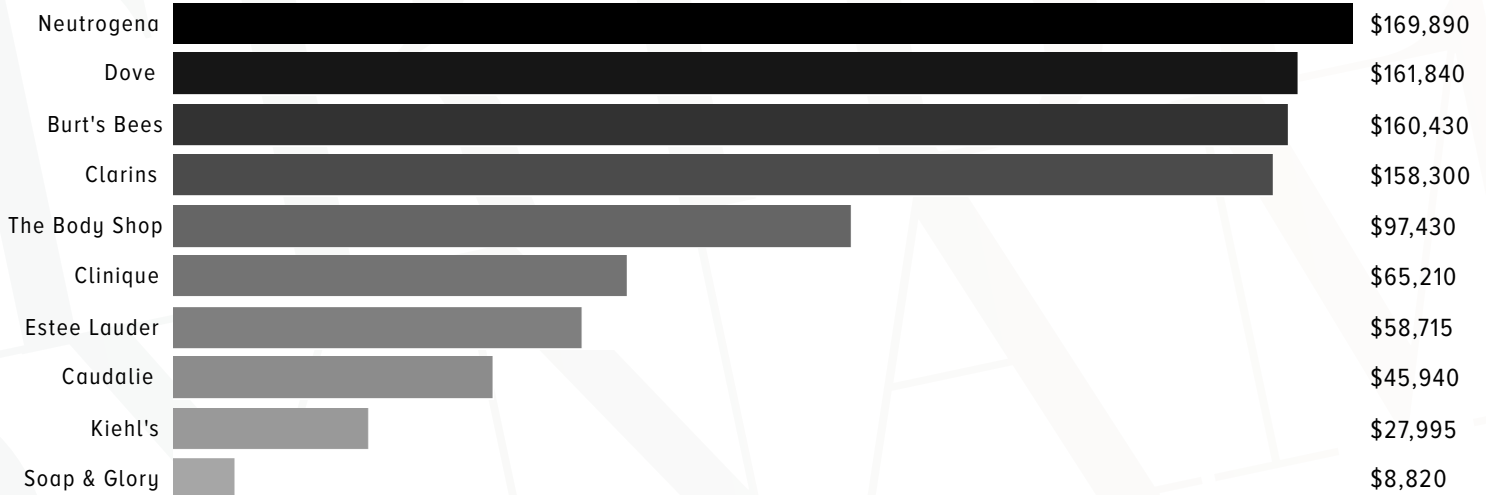
Standing alone, these posts lack the same authenticity of organic content whose heartfelt endorsements not only convince consumers to purchase a product but drives excitement around the brand. Although the guaranteed content creation is attractive, sponsored content often reads more like an advertisement than a genuine backing. Brands also risk a negative response from readers who feel played by the barely-noticeable "sponsored" label that is easy to miss beside the entirety of the post.

Burt's Bees' underperformance on YouTube could in fact be a side effect of its reliance on sponsorship. Perhaps the same bloggers targeted for the 28 Day Challenge were less inclined to endorse the Renewal line in personal "Product Favorites" videos that make up the better portion of the high-engagement content created on the channel, and lay the groundwork for the trust consumers develop for the bloggers they follow.

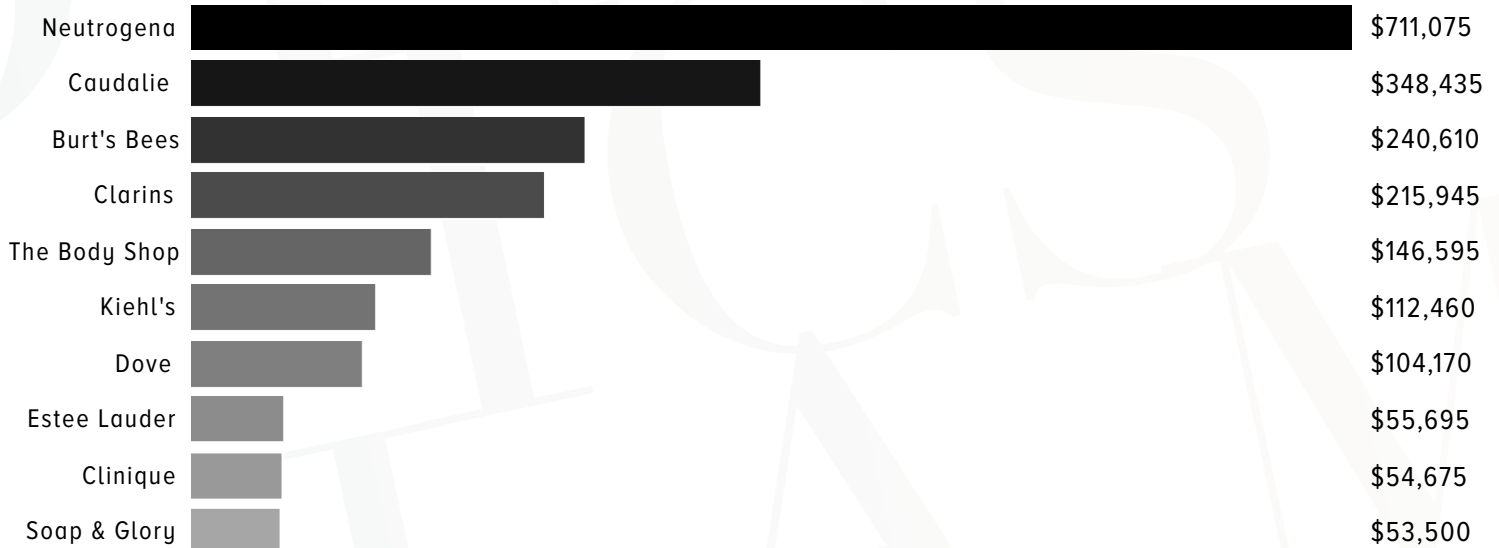
Was Burt's Bees' 28 Day Challenge a success? The sponsored posts drove significant engagement for the brand supported brand awareness more broadly. However, the brand experienced a slight decline between March and April in its overall EMV. The best measure of whether the initiative worked would be to see six months from now whether the brand's relationships make an assessment six months down the line and to see whether the strength follow the brand's relationships with these bloggers over the next six months.

THE TOP 10 - EMV BY SOCIAL CHANNEL

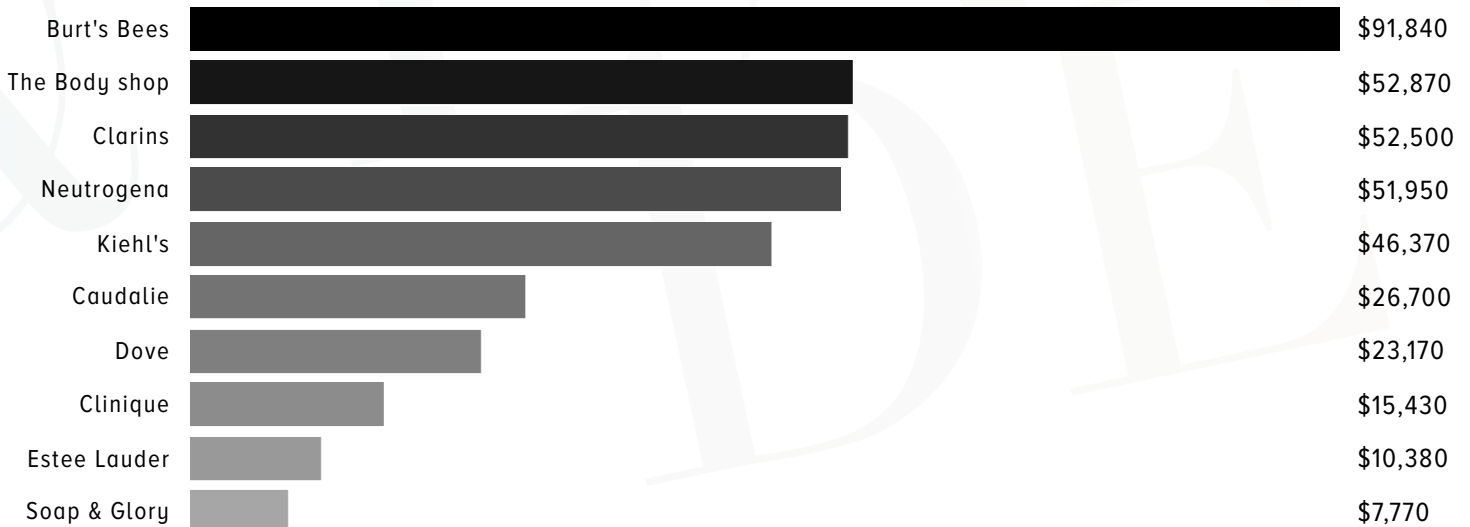
FACEBOOK



INSTAGRAM



PINTEREST

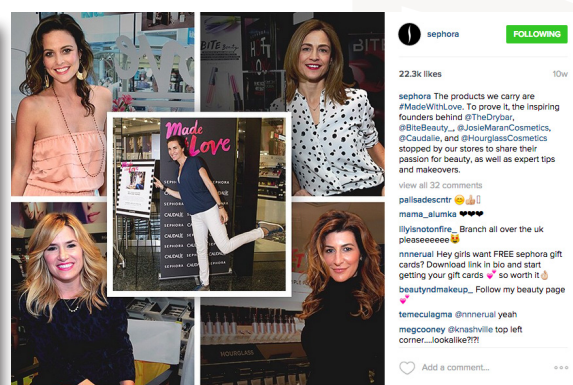


CAUDALIE BENEFITS FROM SEPHORA'S CONTENT CREATION ON INSTAGRAM

Similar to patterns we've seen in the past with monthly growth, Sephora dramatically contributed to the brand's overall Instagram EMV in April. As part of an ongoing social series, Sephora featured a set of brands by highlighting their founders' inspiring stories. Incorporating the hashtag, #MadeWithLove, Sephora's initiative gave its brand and partners a human relatability.

The Instagram post devoted to Caudalie's founder Mathilde Thomas, pictured against the backdrop of a sprawling vineyard with the tagline "Beauty Grows", was far more implicative of the brand's personality and told a more compelling story than a typical product-oriented post.

Not only did Caudalie benefit from exposure to the retailer's 3.4M followers, it's association with the brands also featured established informative points-of-difference for Sephora fans. Caudalie's association with brands like Drybar, Hourglass Cosmetics, Josie Maran, and Bite Beauty influences consumer perceptions on two levels. At the product level, consumers are more likely to purchase these products together based on a subconscious association. On a higher more abstract level, consumer understandings of Caudalie's identity will reflect the recognized characteristics shared by these brands as up-and-coming youthful innovators.

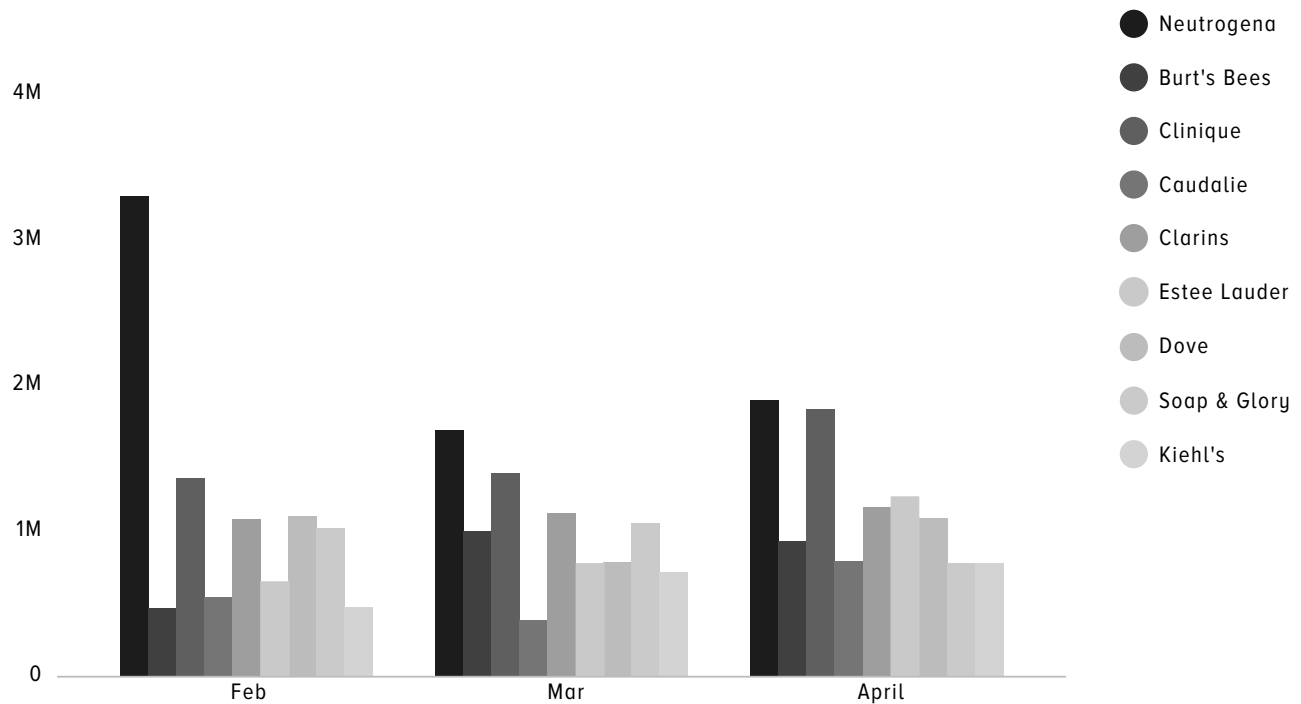


TRENDING EARNED MEDIA PERFORMANCE: **EARNED MEDIA VALUE**

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

TRENDING EMV PERFORMANCE

FEBRUARY - APRIL 2015



BRAND	FEBRUARY	MARCH	APRIL
NEUTROGENA	\$3,297,015	\$1,689,599	\$1,894,748
BURT'S BEES	\$465,144	\$989,472	\$921,535
CLINIQUE	\$1,354,363	\$1,392,438	\$1,827,700
CAUDALIE	\$540,889	\$380,611	\$787,538
CLARINS	\$1,072,094	\$1,114,181	\$1,158,224
ESTEE LAUDER	\$648,423	\$772,600	\$1,230,373
DOVE	\$1,096,126	\$779,903	\$1,084,968
SOAP & GLORY	\$1,014,310	\$1,046,450	\$769,697
KIEHL'S	\$468,231	\$711,483	\$774,565
THE BODY SHOP	\$891,887	\$1,460,524	\$1,790,292

WHO'S WINNING AT THE LIFESTYLE TREND? MASS MARKET VS. PRESTIGE

Over the past six months, mass market brands in our La Mode Top 10 have experienced overall a notably greater increase in overall EMV with a combined 139% versus a still impressive 93% for prestige.

That being said, in April a new trend emerged as prestige brands pulled ahead with a combined 15% better overall EMV performance than mass after only a 3% bump in March. Prestige brands dominated influence on YouTube for the month, outperforming mass by about 106% while mass excelled on Instagram with a 30% lead over prestige despite having one less brand from its segment in the Top 10. Mass market success on the channel deserves an asterisk, as a majority of Instagram EMV was owed to Neutrogena, a definitive earned media leader for either segment.

April's data brought to light differences between the two based on the nature of the content being created. Mass market brands had generated about 52% more sponsored posts with initiatives like Burt's Bees' 28 Day Challenge. Its mirror opposite, prestige had 59% greater promotional content, content that was advertorial in tone but where the influencer was not beholden to a monetary incentive.

ANALYSIS

THE NEUTROGENA EXPERIENCE:

**NEUTROGENA ELEVATES AND INSPIRES
THROUGH BENEVOLENT ACTS**

PART 1: PROMOTING UNCONVENTIONAL DEFINITIONS OF BEAUTY WITH REALISTIC ROLE MODELS

After reaching our eighth Skincare Edition, we've come to expect that Neutrogena will execute something strategically exceptional each month, further cementing its reputation as a digital innovator amongst industry executives, as well as the authenticity of its message amongst influencers. Neutrogena's commitment to an ongoing storyline, closely following its interactions and involvement in the lives of individuals and unique communities, continues to feed the growth of its presence online.

In April, Neutrogena held true to its commitment to a specific community, elevating Latina bloggers with two well-received, creative digital initiatives. The brand's unique approach to community mentorship has encouraged connections with less traditional, but highly influential, bloggers who identify with the brand's noticeably distinct value proposition.

For the first of Neutrogena's two successful partnerships for the month, the brand celebrated an individual influencer, Massy Arias, by allowing her to serve as the human mouthpiece for the brand, and capture the brand's personality in the content she created. The theme of the partnership, empowerment, creatively challenged conventional beauty standards, and highlighted the strength and natural beauty of the athletic, tattooed Latina blogger and fitness coach, Massy.

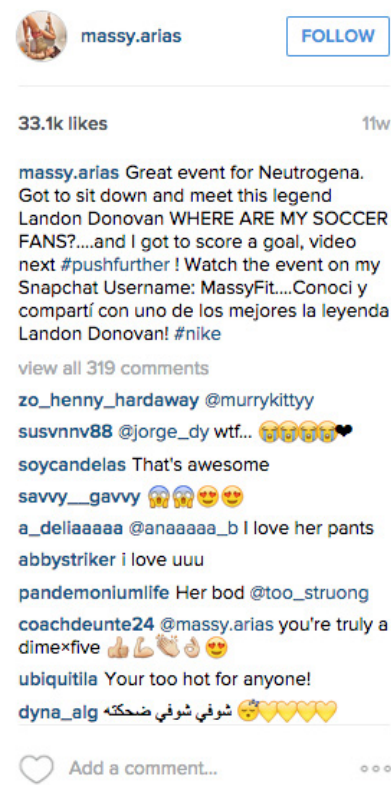


Neutrogena invited the blogger to take a trip to the StubHub Center, where she had the opportunity to meet soccer legend Landon Donovan. An athlete and soccer fan, Massy's elation defined her Instagram posts, which she shared throughout the once-in-a-lifetime experience. Speaking to her Latina followers as Neutrogena's entrypoint to this community, Massy included a Spanish translation of her experience in every post.

Massy supplemented the two-dimensional Instagram posts by sharing an interactive video via her own Snapchat, Massyfit, that showed her kicking around a soccer ball with Donovan (and scoring a goal). In one post, the blogger recognized Neutrogena's involvement, who was otherwise altogether absent from the organic stream of content being created during the day: "Great event for Neutrogena."

"Heading to the Stub Hub Center for the Neutrogena event with Landon Donovan watch it on Snapchat username: MassyFit 🍌 🍌 here we come!"

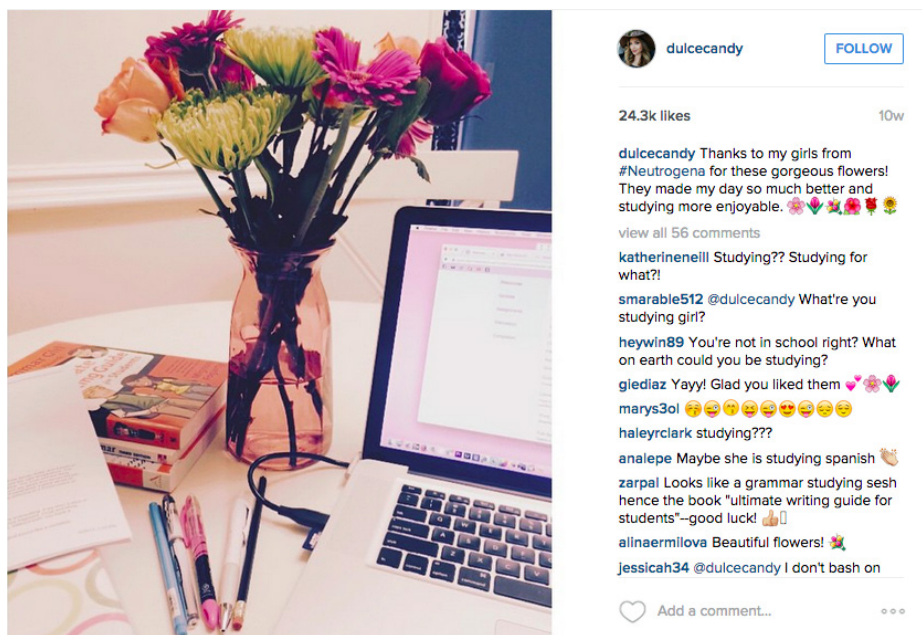
"Great event for Neutrogena. Got to sit down and meet this legend Landon Donovan WHERE ARE MY SOCCER FANS?....and I got to score a goal, video next #pushfurther ! Watch the event on my Snapchat Username: MassyFit."



PART 2: ENGAGEMENT PIVOTS AROUND ENVIRONMENTALLY-CONSCIOUS SPONSORSHIP

The second noteworthy campaign run by Neutrogena in April was #WipeforWater, in which the brand once again relied on blogger Dulce Candy's influence to raise awareness and money for water conservation. In conjunction with the lease of Neutrogena Naturals, a new line of environmentally friendly wipes, Neutrogena partnered with Dulce to help run a digital campaign to address California's drought. The Wipe for Water Challenge resembled the viral Ice Bucket Challenge, by introducing an online challenge that could very socially and visibly raise money for a specific cause. Dulce Candy, challenged by Neutrogena spokesmodel Kristen Bell, refrained from using water to wash her face for five days, instead relying on the waterless Neutrogena Naturals wipes to remove all makeup and daily grime. The blogger shared her experience over the course of the five days and after with her burgeoning community online. For every person that took the pledge, Neutrogena donated a dollar to the Nature Conservancy to support water conservation.

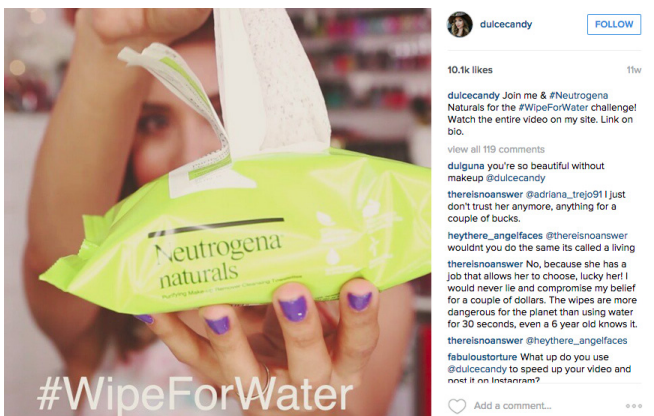
Dulce created a multitude of content across the social channels, and encouraged her followers to take the pledge themselves. In one high-engagement video, the blogger introduced the challenge by removing a full face of makeup with a single Naturals wipe. While the video was clearly pushing the product, the sincerity of Dulce's message — that as a Californian, she understood and appreciated the importance of conservation — overshadowed any seemingly advertorial moments. The video ended with Dulce appealing to viewers that they make a pledge by visiting the official Wipe for Water website, and use the hashtag on social media.



Wipe for Water's success was not just limited to beauty, but also received recognition outside of the industry. The campaign was shared amongst Neutrogena's followers and the larger online beauty community, accumulating 1,134 posts on Instagram that referenced the campaign hashtag, and approximately \$499K in overall EMV for the month alone. The campaign also received a glowing nod from Adweek, whose coverage of the campaign painted a picture of Neutrogena as a digital innovator in general.

In an Adweek interview the Neutrogena Naturals brand manager, Simon Geraghty, had this to say about the strategy behind Wipe for Water: "What we've been finding with our Naturals brand is really great success reaching national consumers through digital and social because of the ability to target ... it makes our spend effective and efficient with messaging that's much more relevant to consumers."

The most telling summation of why the campaign was able to successfully engage followers came later in the Adweek article, when Geraghty theorized that "it's not necessarily always about putting the products front and center the way it is for other beauty products and brands—it's more about connecting with lifestyles." This attitude, along with a conscious commitment to a fuller consumer experience of the Neutrogena brand within lifestyle conversations online, continue to be a powerful points of difference for the brand from both mass market and prestige competitors.



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