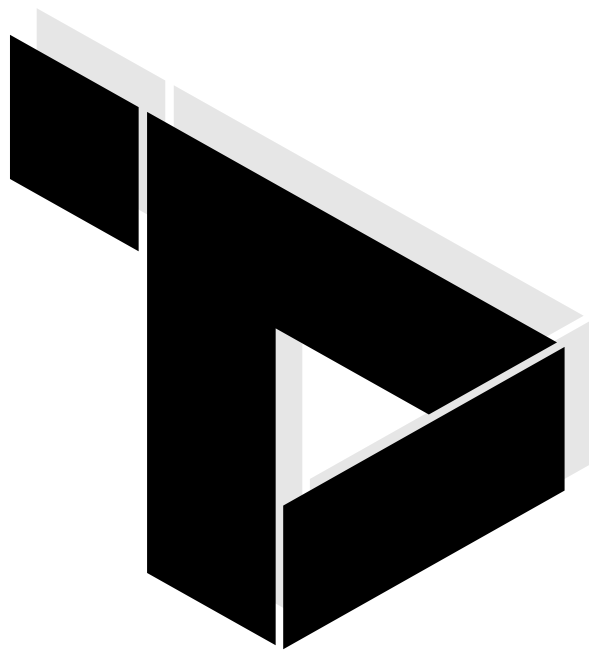


LA MODE MAY

SKINCARE EDITION



ANALYSIS BY
CHRISTINA GOSWILLER & MERISSA REN

EMV

Earned Media Value

EMV is 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, 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.

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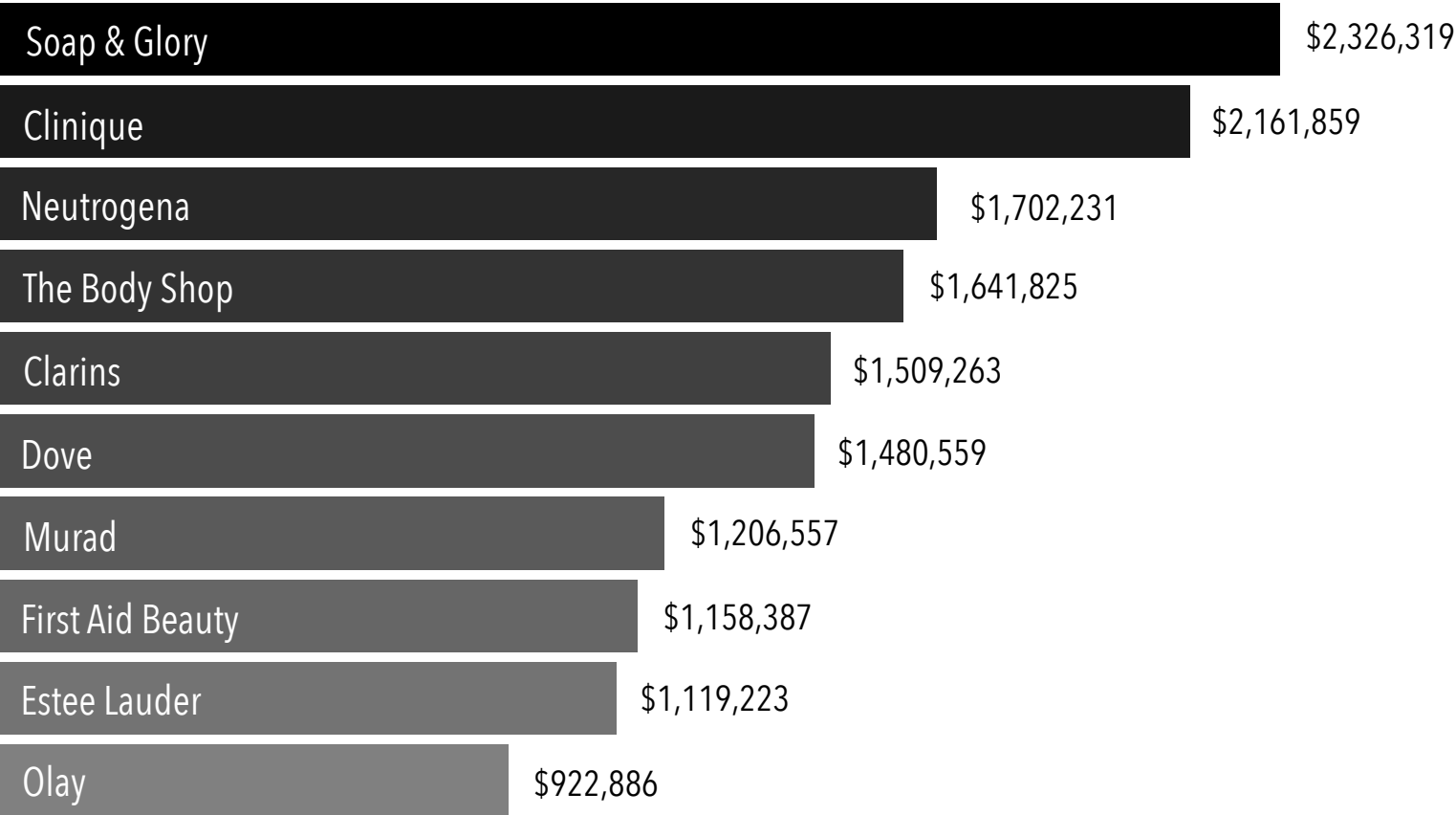
THE TOP 10

Earned Media Value Leaderboard

As considered in last month's La Mode, the dominance of prestige over mass skincare brands continued in May. This month revealed clear demarcations in terms of strategy along the prestige/mass divide.

Leaders in the mass sector focused their efforts on consumer-facing campaigns that centered on empowerment. Neutrogena built their campaign around the empowerment that stems from information and choice, while Dove gave women the opportunity to feel empowered by challenging beauty standards with their own understandings of beauty. However, both brands’ interactions with influencers were largely composed of traditional, paid sponsorship relationships.

By contrast, leading prestige brands successfully cultivated meaningful relationships with established beauty influencers through thoughtful personal interactions, and carefully designed brand experiences. Additionally, these prestige brands excelled at communicating how their skincare products fit into already existing beauty routines, inserting themselves into established beauty conversations.

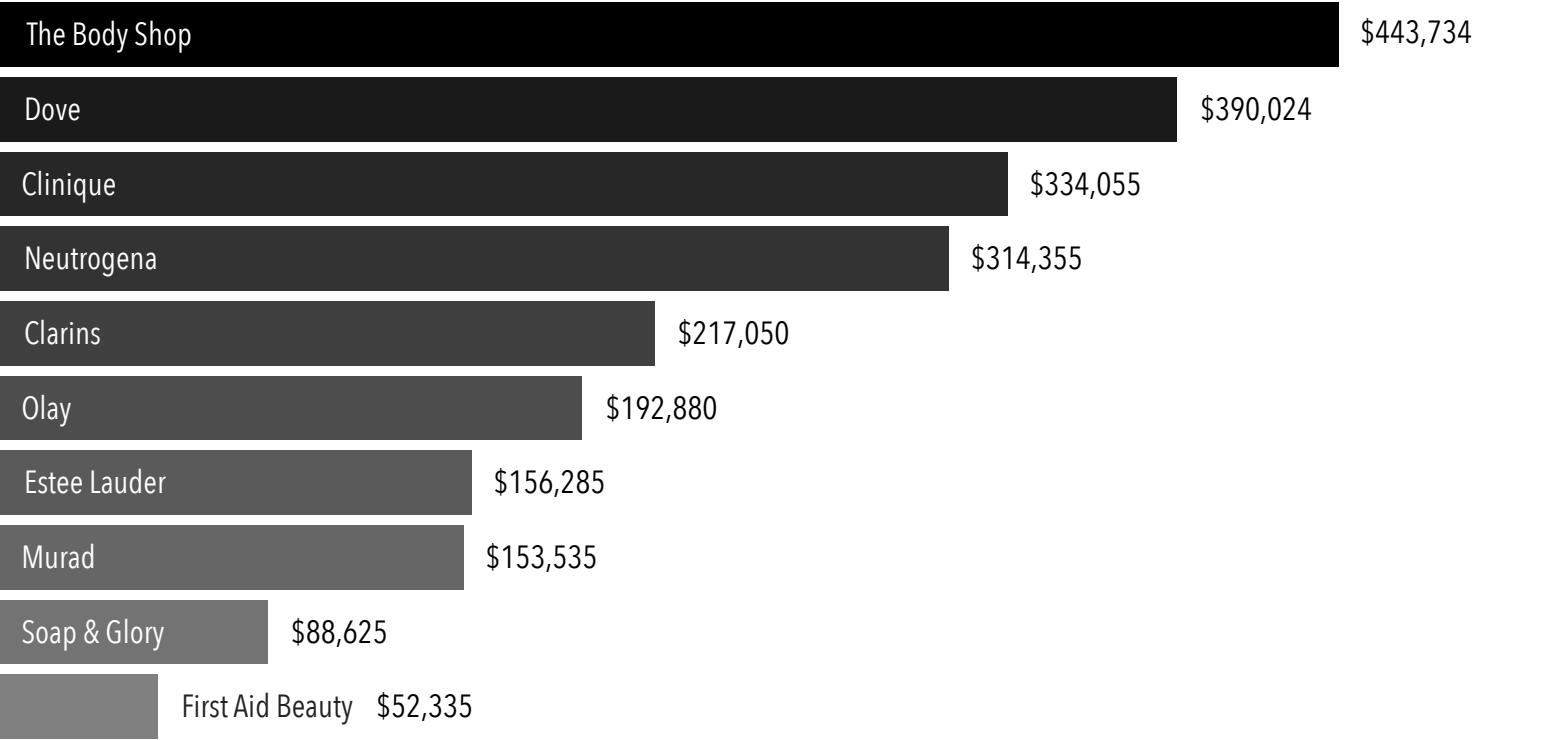


Prestige
\$9,481,607
Mass
\$5,747,501
Difference
64.97%

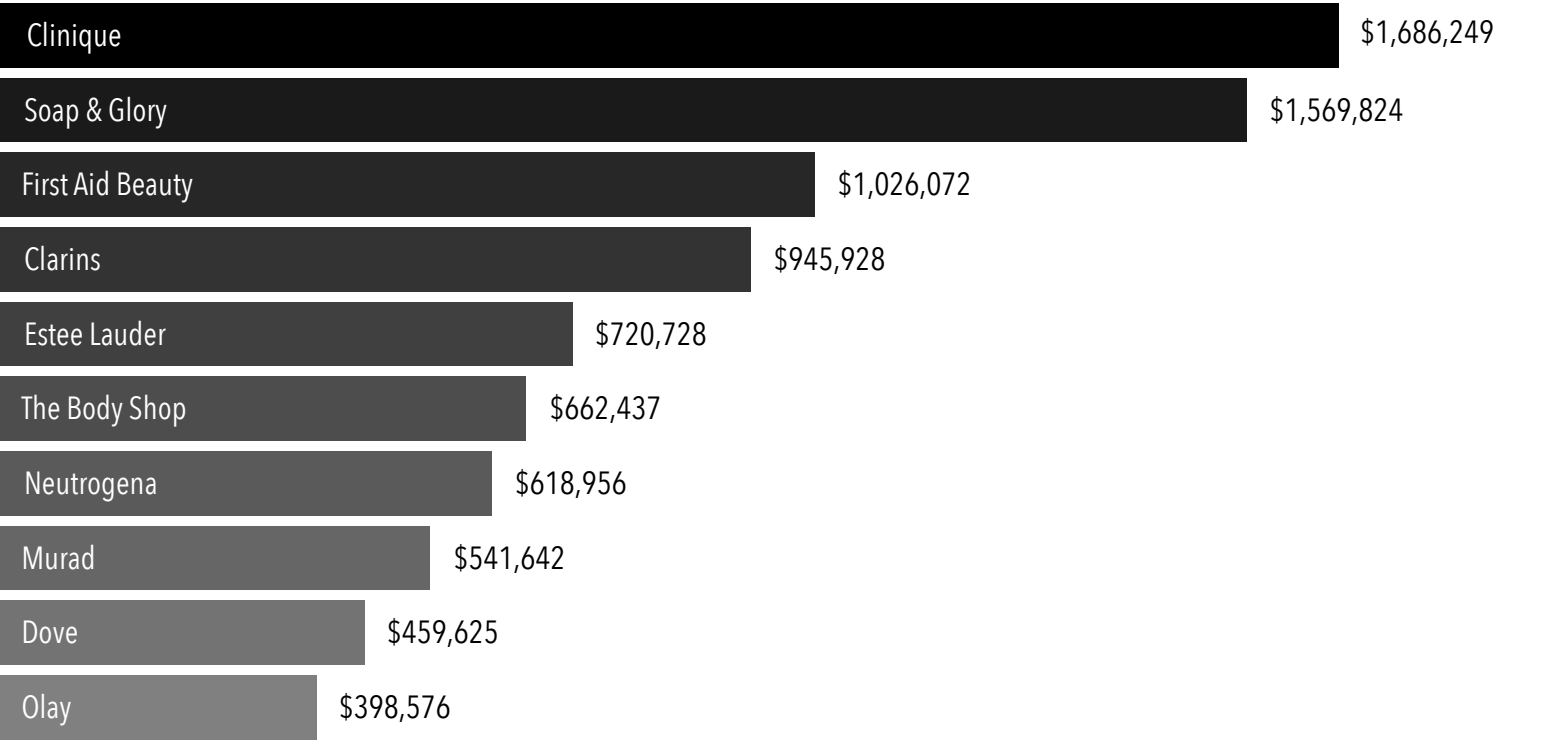
THE TOP 10

Earned Media Performance By Channel

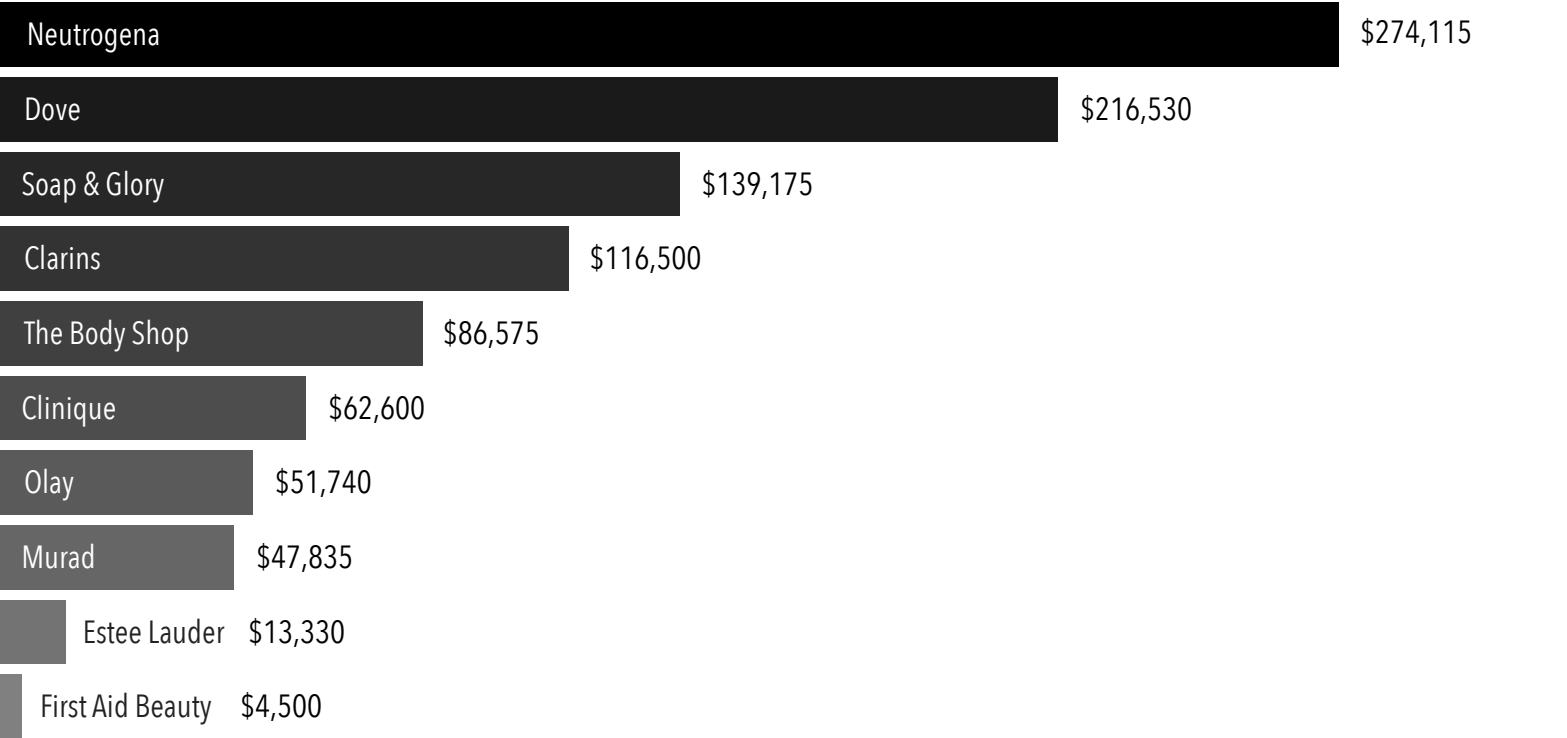
BLOG



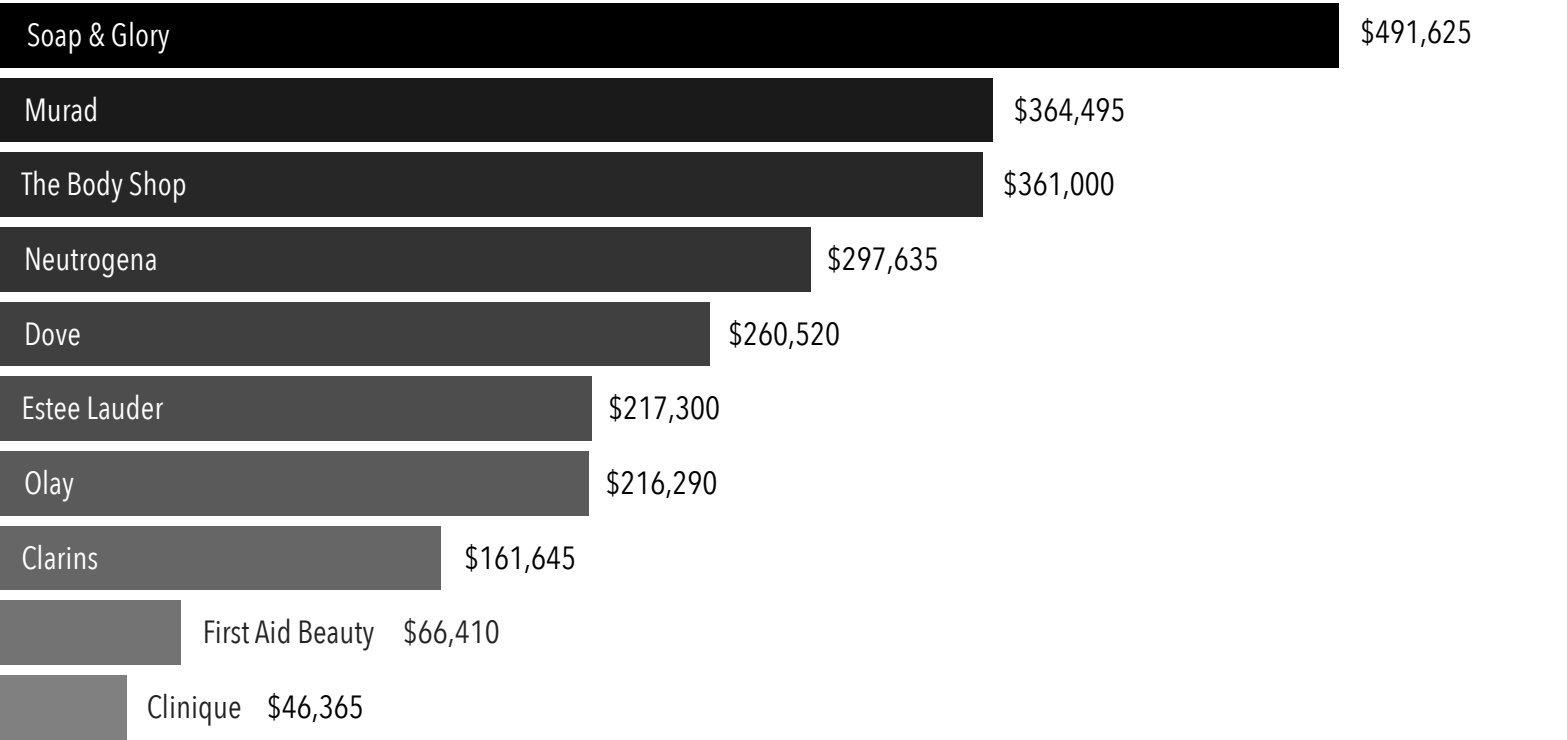
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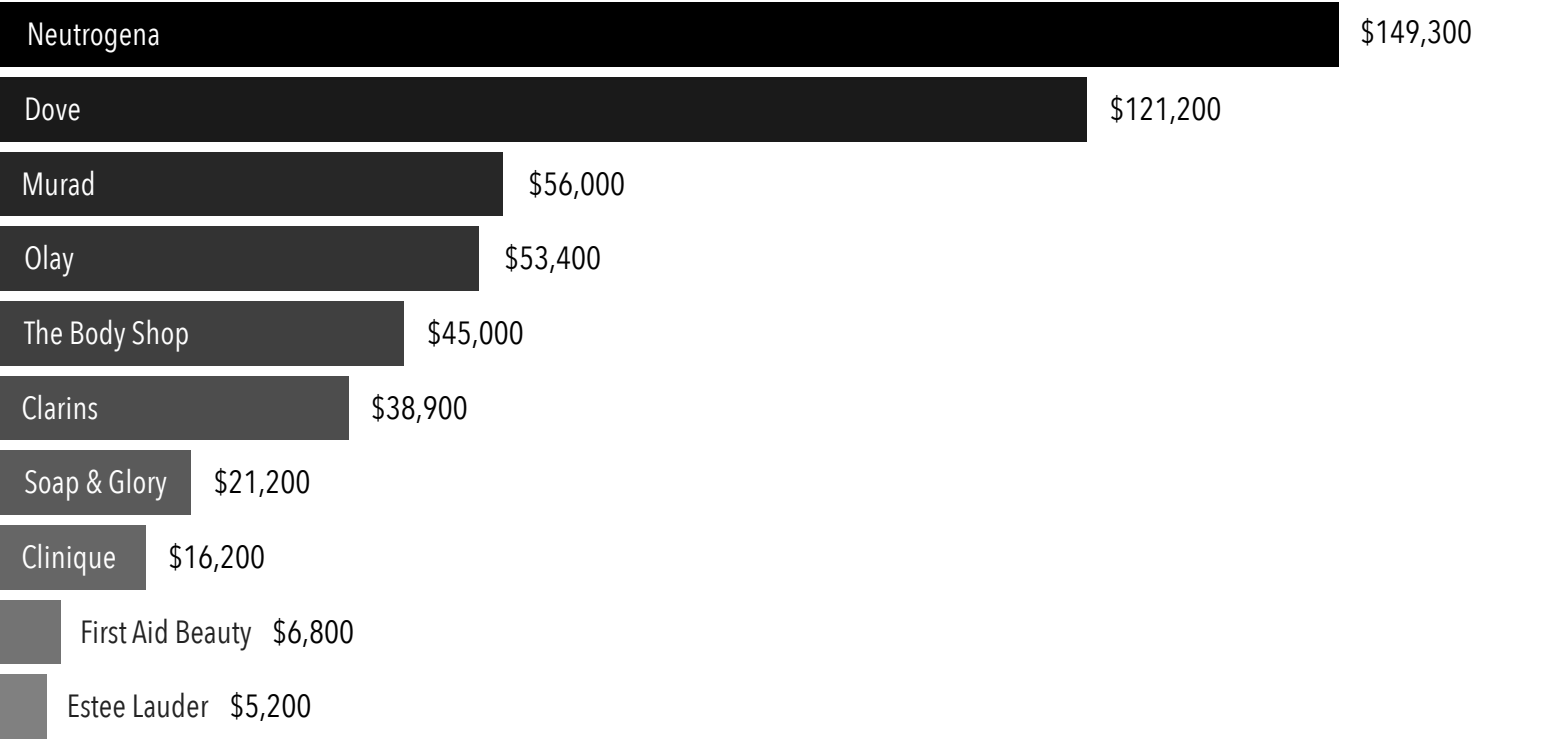
FACEBOOK



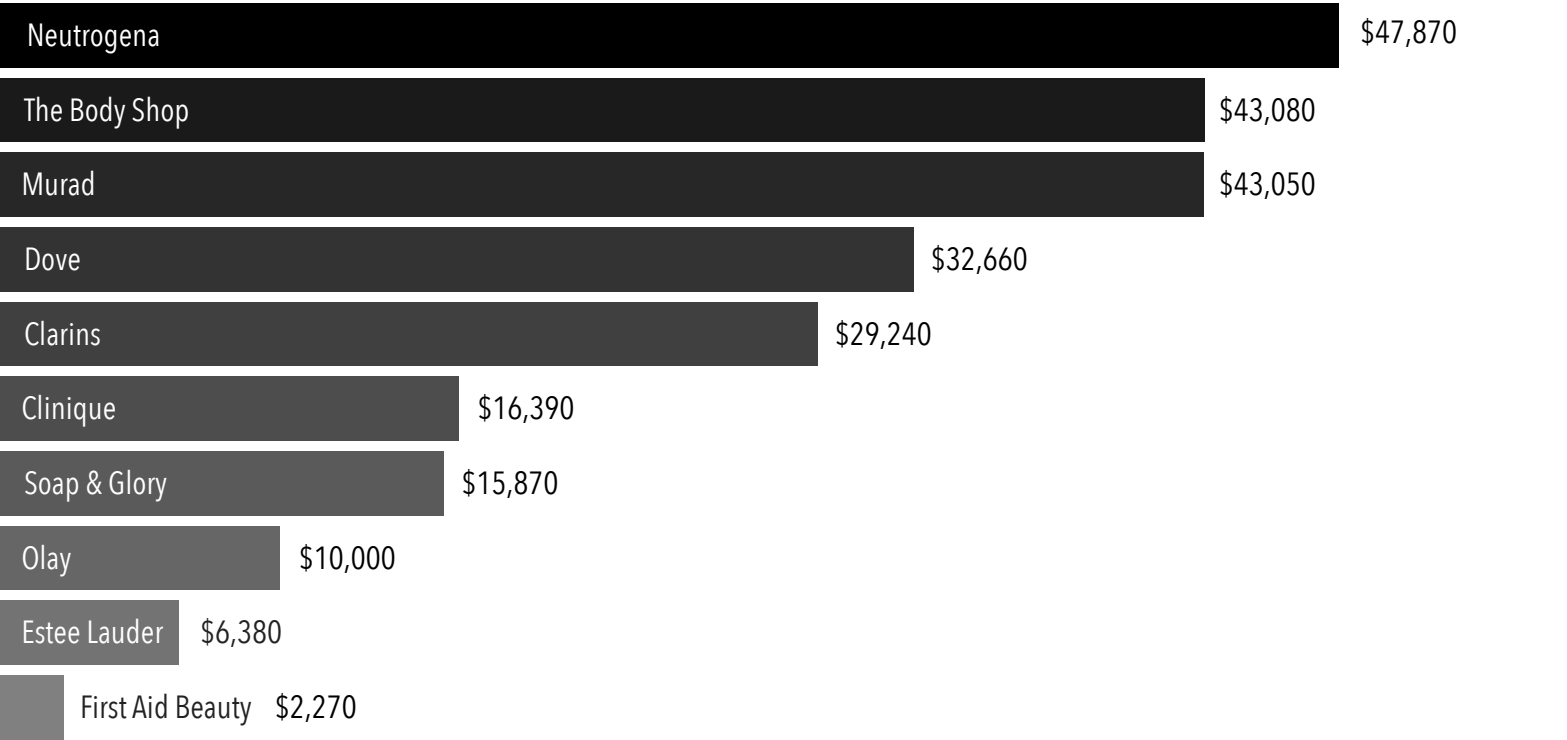
INSTAGRAM



TWITTER



PINTEREST



EMPOWERING INITIATIVES ON FACEBOOK AND TWITTER

In May, Neutrogena and Dove dominated the more traditionally consumer-facing channels, Twitter and Facebook (as opposed to YouTube and Instagram, channels favored by established beauty influencers).

Both brands ran successful initiatives centered on empowering their customer to take control of their skin health and their own understandings of their beauty, with Neutrogena promoting the hashtag #chooseskinhealth, and Dove using #mybeautystory and #loveyourcurls.

Neutrogena's chooseskinhealth hashtag, which generated \$202.5K in EMV (\$62.1K on Twitter and \$140.4K on Facebook), was attached to a Twitter "party" that boasted tips, skin health advice, and Q&A's with celebrities, influencers, and dermatologists. Participants used the hashtag across channels to build anticipation for the party, as well as in all tweets throughout the party. The brand's campaign was compelling because it empowered the consumer with the choice of how to protect their own skin health. Neutrogena also successfully used this campaign as an opportunity to further solidify its dedication to the Latina blogger community; the brand partnered



with many influencers through the LatinaBloggersConnect network and invited them to be Twitter party hosts alongside established celebrities and dermatologists.

Dove used Mother's Day as an opportunity to invite consumers to challenge conventional beauty standards by sharing personal stories of their understandings of beauty, as shaped by their mothers. Bloggers focused on the holistic understanding of beauty that they learned from their mothers: to laugh often, listen deeply, and be kind, with a clear focus on celebrating their mothers, as opposed to speaking about beauty in reference to aesthetic expectations or makeup tips. This more abstract approach to beauty, in conjunction with finding

inspiration in real women, specifically mothers, generated \$137.2K in EMV on Facebook. Again, this expansive and empowering understanding of beauty proved inspiring, and mobilized the brand's community of consumers and influencers.

Although both brands experienced significant EMV generation around these compelling campaigns, the majority of the posts clearly stated that they were ads and sponsored by the brand. While these campaigns did prioritize giving agency to consumers and influencers, the advertorial nature of the posts could curtail ongoing conversations and corrode consumer trust for future encounters with the brand.

PERSONALIZATION ON INSTAGRAM

This month, Soap and Glory achieved a significant lead on Instagram, due largely to a singular product send of The Righteous Butter to a variety of beauty influencers (with followings ranging from 2.7K to 562K)



Personalized Righteous Butter gifts for Instagram personalities @heyclair (18.9k likes, left) and @nabelanoor (913 likes, right)

The brand created personalized packaging for each of the influencers, so that their first name was included on the label of the product itself. Usually, The Righteous Butter container reads, “Bored? Lost that rubbing feeling?”; for this particular initiative, the influencer receiving the package could see her name included in the question (“Bored, Claire?”). Of the \$491.6K in EMV that Soap and Glory earned on the channel, \$444.3K (90%) of the

total EMV was owed to posts that emphatically thanked the brand for this particular personalized product. Influencers were unanimously surprised and touched by how thoughtful the gesture was.

This initiative was incredibly successful in establishing a genuine act of goodwill that subsequently drove high value content. HeyClaire even clarified that her post including the personalized product was #notsponsored,

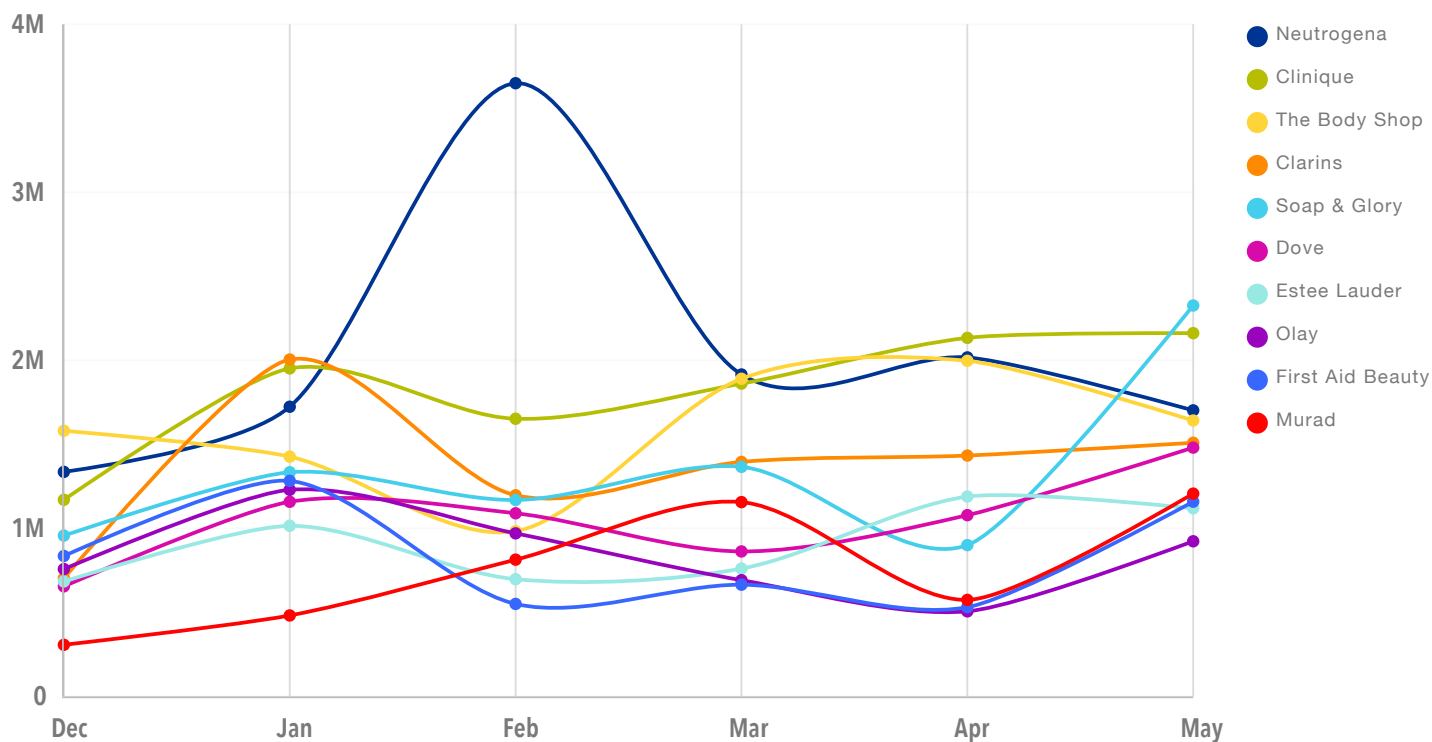
adding #justappreciatethegesture. The perceived authenticity of the brand’s generosity contributes to her followers’ trust, and reinforces their belief in heyclair’s honest opinions and beauty advice.

While this initiative was successful in driving content creation, showing an obvious immediate impact, it is just a first step in building a lasting community of influencers. It will be interesting to see how the brand follows up on this campaign, and continues the conversation around both this product and the brand as a whole. Soap and Glory will need to continue to reach out to these influencers to continue this valuable conversation that they have initiated.

“But what really made my jaw drop was seeing my name on the packaging of the righteous butter! IS THIS REAL LIFE?!?!”

- @nabelanoor

OVERALL TRENDING EMV



QUARTERLY GROWTH

BRAND	DEC-FEB	MAR-MAY	GROWTH
Neutrogena	\$6,709,278	\$5,635,227	-16.01%
Clinique	\$4,773,864	\$6,156,988	28.97%
The Body Shop	\$3,991,026	\$5,529,314	38.54%
Clarins	\$3,904,347	\$4,337,926	11.11%
Soap & Glory	\$3,459,293	\$4,592,324	32.75%
Dove	\$2,902,441	\$3,421,378	17.88%
Estee Lauder	\$2,396,270	\$3,068,362	28.05%
Olay	\$2,957,077	\$2,120,176	-28.30%
First Aid Beauty	\$2,668,208	\$2,353,466	-11.80%
Murad	\$1,601,616	\$2,936,641	83.35%

PRESTIGE vs MASS GROWTH

PRESTIGE

172.44%

MASS

12.11%

Analysis

INTEGRATING SKINCARE IN ESTABLISHED COSMETIC CONVERSATIONS

Brands that excelled in earned media this May successfully mobilized established beauty influencers to engage in compelling conversations that extended beyond individual products to holistic understandings of beauty and aspirational lifestyles. Each of these leading brands overlapped in their strategies to forge lasting relationships with influencers through celebrating the influencer, drawing connections between skincare and established beauty aesthetics, and integrating their skincare products into complete beauty routines. Soap and Glory, Murad, and First Aid Beauty all put their own personal spin on their execution of these larger strategic goals.

Part 1

RECOGNIZING THE INFLUENCER AS AN INDIVIDUAL

1



Beauty guru @desimakeup posted an Instagram mentioning the @muradskincare event netting 35.1k likes and upward of 270 comments

Like Soap and Glory, who excelled at making the influencer feel special through their thoughtful personalization campaign, Murad has consistently honed its dedication to making influencers feel celebrated over the past few months. Murad has sent individualized personal gifts to influencers they have worked with, including birthday gifts, macarons, spa days, and jewelry, proving that

the brand and influencer's bond extends beyond a relationship with its product. Murad has also made in-person events a major way that the brand connects with its influencers, celebrating their role in their beauty community. Events provide an opportunity for the brand to send influencers home with generous amounts of product and treat their influencers as valued insiders. At Murad's most recent event, the Spring Soiree, the brand successfully created an experience that communicated their genuine appreciation of the influencer, while inspiring organic and high-value content to be created: Artists created individualized fashion illustrations of attendees at Murad's Spring Soiree, and each centerpiece and dessert display was carefully crafted for maximum Instagrammability. Consequently, nearly half of Murad's total instagram EMV was created in response to this event (\$163.8K in EMV). This kind of content and relationship building with beauty bloggers is so impactful because it distinguishes Murad as more than a brand that makes effective skincare products. Murad is a brand that cares deeply about its influencers and consumers, is generous in spirit, and is associated with the celebrity beauty influencer and the glamorous worlds of high fashion.

Part 2

CREATING A CONNECTION BETWEEN SKINCARE AND MAKEUP

2

One way that all three of these leading brands insert themselves into the conversations led by established beauty influencers is to situate their products, both implicitly and explicitly, within larger beauty routines, often as necessary foundations for makeup looks. By showing where the brand fits into the beauty blogger's existing regimen, it can be part of a more compelling narrative. Murad clearly positioned its Invisiblur product as a direct contributor to the glamorous matte finish that many of the higher echelon beauty

bloggers consistently strive for. The brand's owned media posted tutorials showing how the Invisiblur product could work with other steps in the contouring process to achieve Photoshop-like perfection. Though Soap and Glory did not make any explicit claims about their skincare products' roles within larger cosmetic routines, many of their most valuable YouTube videos featured multiple products from both Soap and Glory's skincare and makeup lines. Together, these products formed cohesive looks.

Part 3

YOUTUBE VIDEOS & TUTORIALS

3

On YouTube, established beauty bloggers showed how they would incorporate First Aid Beauty products into their makeup processes without any explicit guidance from the brand's owned media. Bloggers making this organic connection included Ingrid Nilsen, who noticed that the formula for the moisturizing gel was so smoothing and mattifying that she could use it as her primer. Other First Aid Beauty products that function as preparatory steps also received significant attention, including a lip treatment that could be used immediately before putting on product, and an undereye treatment that also doubled as a brightener that could be worn during the day. The brand also used its unique, sensitive skin value proposition as a distinguishing factor for established beauty influencers who tend towards full glam artistry looks that can be taxing on one's skin. Influencers like MannyMua, who have exaggerated aesthetics but sensitive skin, gravitated towards First Aid Beauty products to prep and soothe his skin

underneath his dramatic looks. Consequently, the brand was able to reach a range of aesthetics among these top tier beauty bloggers, from the more wholesome, "holistic lifestyle" bloggers, to the full-on glam artists with sensitive skin needs.

This month's leaders seamlessly inserted themselves into beauty conversations by finding specific ways to make their skincare brand compelling to established beauty bloggers. While Murad tapped directly into the glamorous Photoshopped aesthetic

that many beauty bloggers strive towards, First Aid Beauty found a place for its products in the routines of influencers with sensitive skin. Soap and Glory and Murad both showed their commitments to honoring and cultivating their relationships with their influencers, treating them as valued members of their brand's community. Ultimately, these brands led the competitive set in May because they employed initiatives that effectively aligned their own brand values with the values of beauty bloggers.



YouTube star Ingrid Nilsen talks Summer Essentials, mentioning First Aid Beauty and netting 63k views