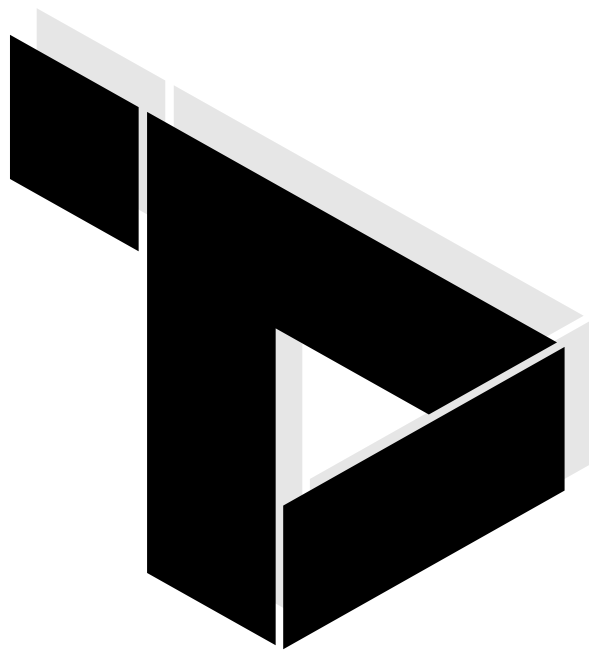


LA MODE SUMMER

JUNE - SEPTEMBER 2015 SKINCARE EDITION



ANALYSIS BY
CHRISTINA GOSWILLER, MERISSA REN, & GRACE CHAO

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, 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.

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THE TOP 10

Earned Media Value Leaderboard

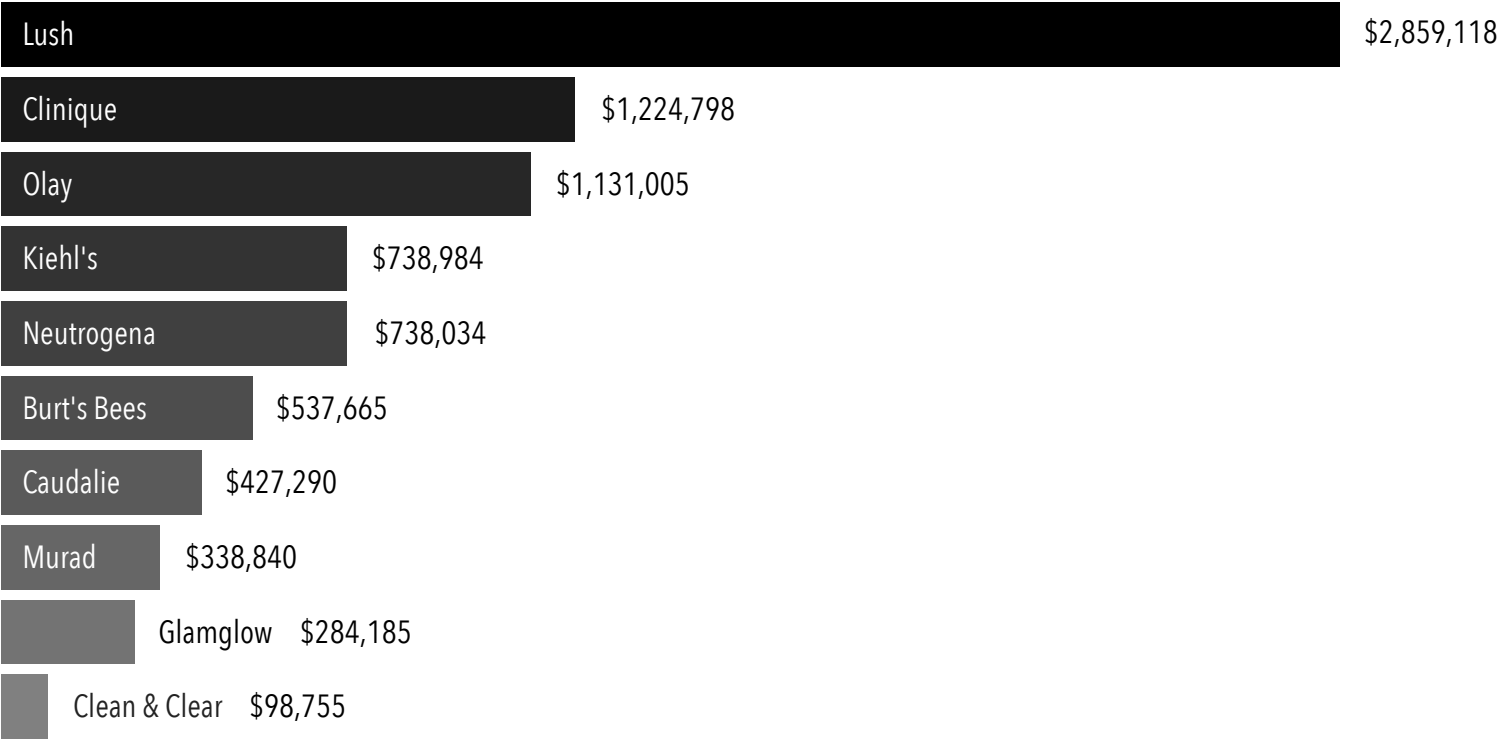
Jun-Sep Top 10 Brands

Lush	\$19,775,538
Clinique	\$5,874,862
Murad	\$5,762,007
Neutrogena	\$5,438,019
Kiehl's	\$4,642,750
Olay	\$3,632,515
Caudalie	\$3,603,612
Burt's Bees	\$3,593,898
Clean & Clear	\$3,584,382
Glamglow	\$3,397,033

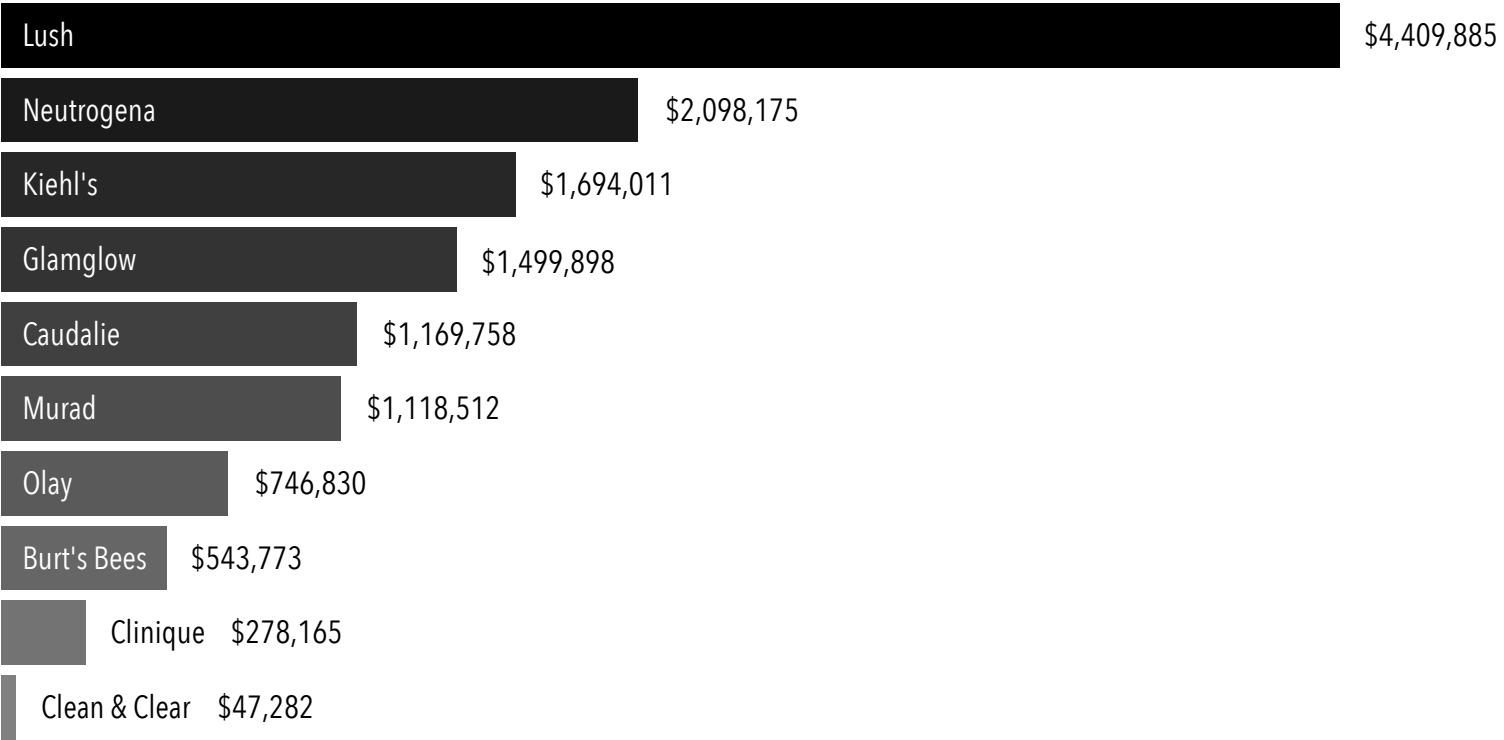
THE TOP 10

Earned Media Performance By Channel

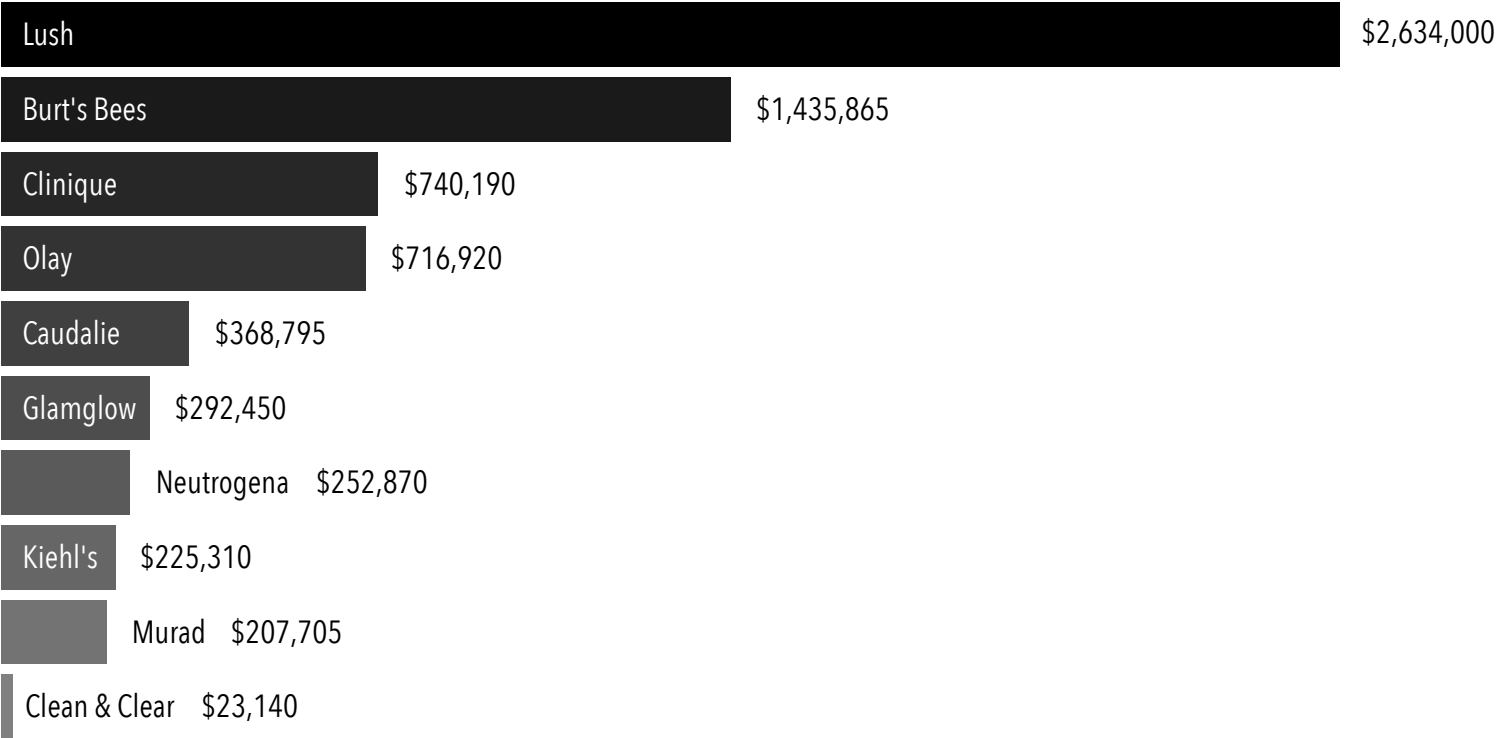
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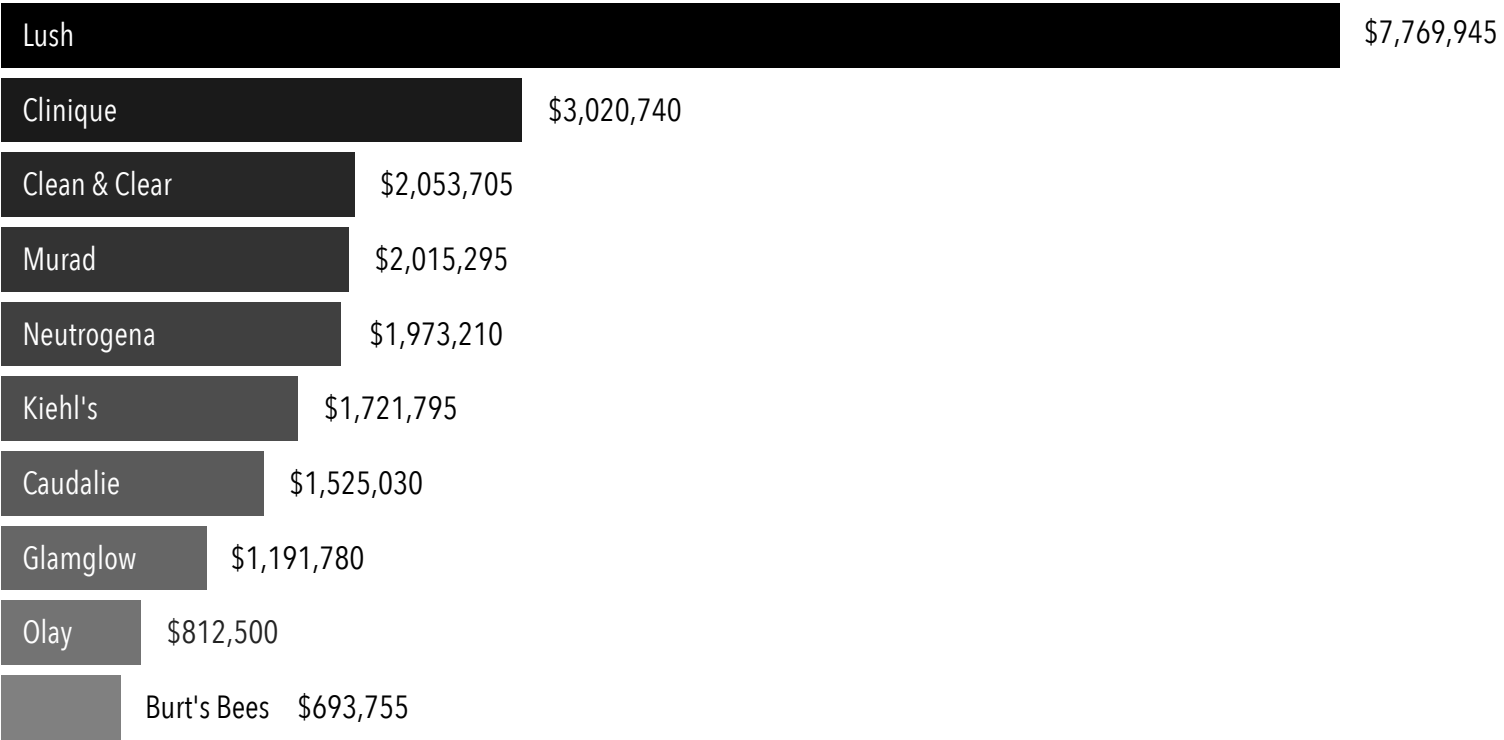
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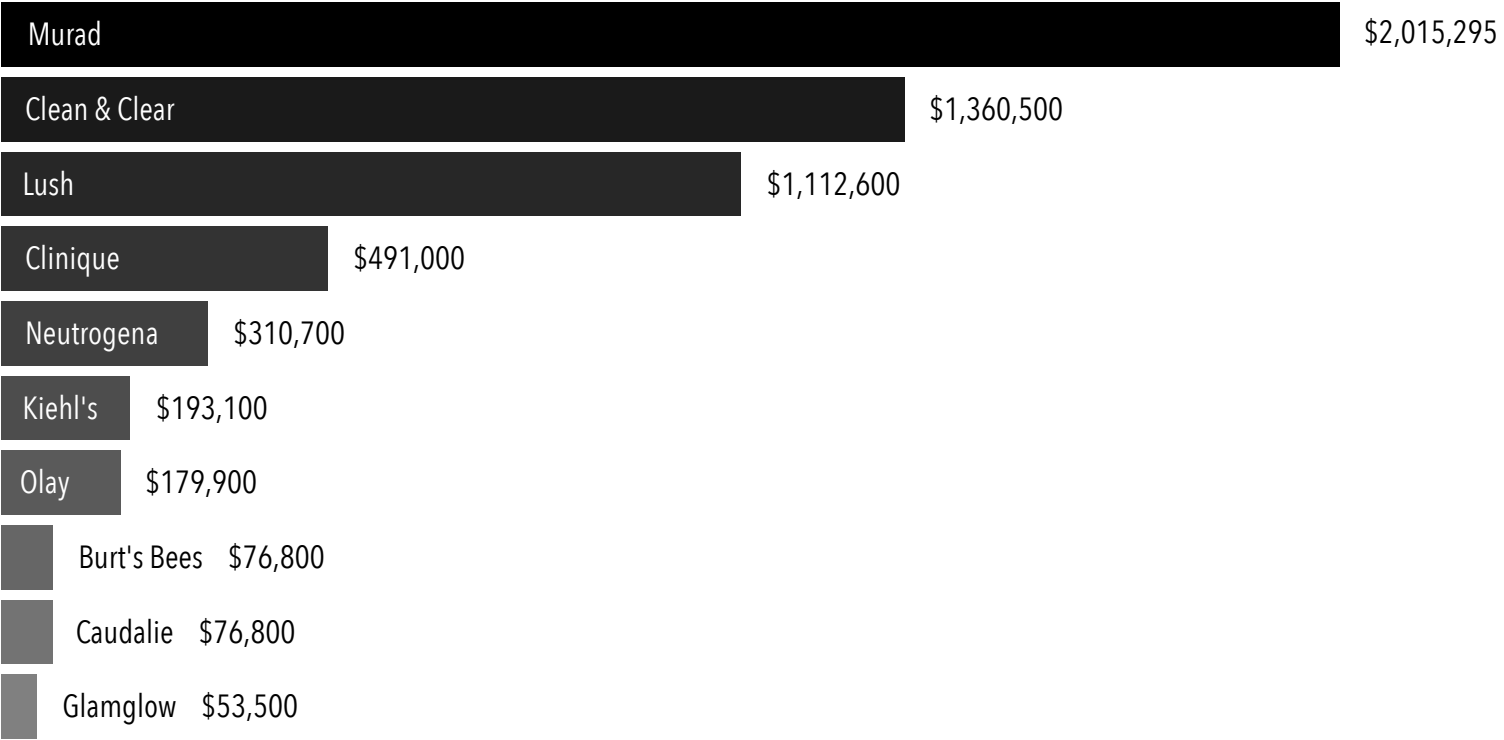
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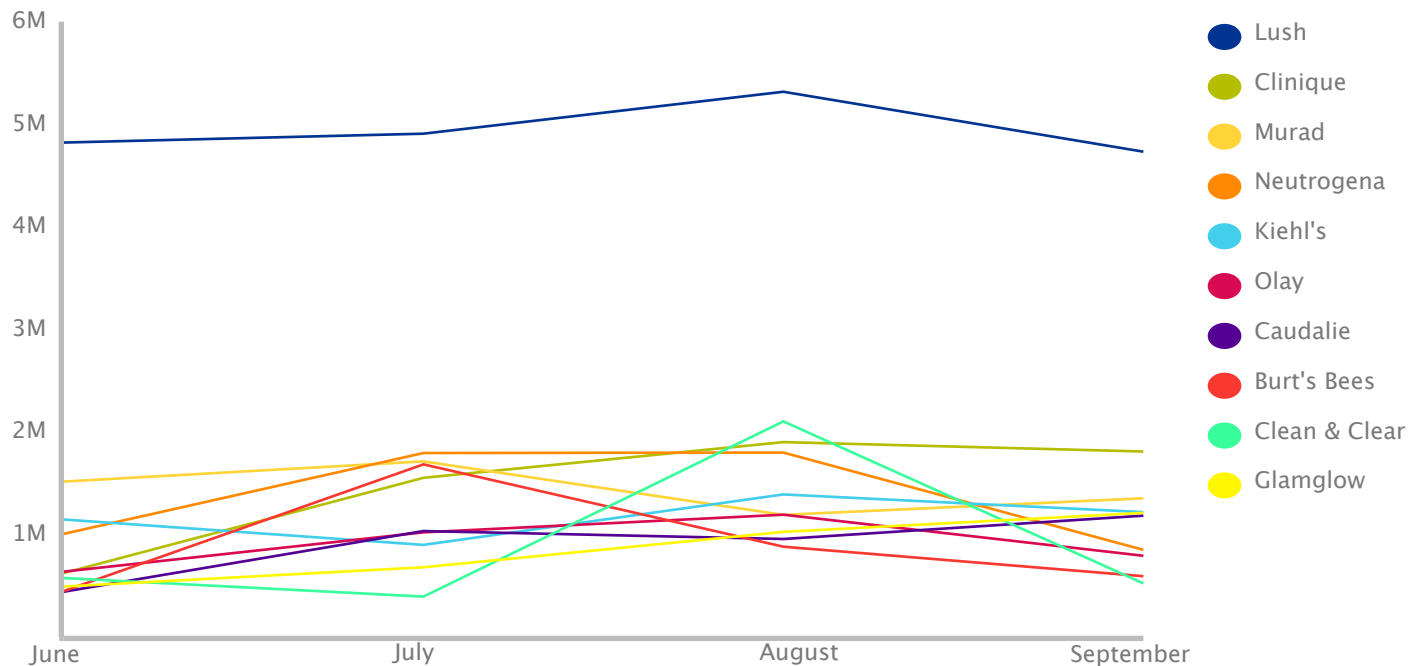
TWITTER



PINTEREST



OVERALL TRENDING EMV



OVERALL GROWTH

BRAND	JUNE	JULY	AUGUST	SEPTEMBER
Lush	\$4,820,559	\$4,907,161	\$5,316,149	\$4,731,670
Clinique	\$620,029	\$1,549,899	\$1,898,375	\$1,806,559
Murad	\$1,513,148	\$1,710,364	\$1,188,309	\$1,350,186
Neutrogena	\$1,002,596	\$1,792,013	\$1,796,216	\$847,194
Kiehl's	\$1,143,588	\$895,701	\$1,388,051	\$1,215,410
Olay	\$634,688	\$1,017,972	\$1,190,334	\$789,522
Caudalie	\$438,501	\$1,030,959	\$953,196	\$1,180,957
Burt's Bees	\$444,417	\$1,681,175	\$877,987	\$590,320
Clean & Clear	\$572,710	\$391,174	\$2,100,377	\$520,122
Glamglow	\$489,039	\$677,044	\$1,022,648	\$1,208,303

Part 1:

1

Taking Care of the Individual through On-Brand Experiences

Between June and September of 2015, several leading skincare brands invited individual influencers to participate in luxurious, on-brand getaways and spa days that led to EMV-heavy content creation. Kiehl's swept several bloggers away on a yacht, where they learned about first-rate skincare from a specialist. Murad made sure that its influencers felt recognized and cared for by preemptively sending them birthday presents and most-wanted products. Lush and Caudalie not only pampered their influencers with relaxing spa treatments, but also invited them to take part in concocting the brands' products with their own hands.

Kiehl's Treats Ambassadors to an Enriching Ibiza Getaway

Kiehl's' most fruitful initiative owes its success to the relative ambiguity of the brand's degree of involvement in the campaign.

In August, a group of established British beauty bloggers, including influencers in thefrow and thebeautycrush, set off to Ibiza with skincare specialist Teresa Tarmey to relax aboard a yacht, do group yoga, receive facials, and learn about skincare.

Unsurprisingly, the influencers were inclined to create an outpouring of content about the experience, documenting their adventures through Instagram posts and chatty "day-in-the-life" vlogs (\$343.9K in EMV).

Kiehl's' SPF products were seamlessly integrated into the majority of these influencers' getaway posts. Every time a product was mentioned, the bloggers couched their endorsement by adding that Teresa Tarmey had recommended the particular product and that it was serving them well on their "fabulous" vacation. Through their Ibiza experience, the influencers came to associate the product with an aspirational lifestyle and develop emotional attachment to the Kiehl's brand, allowing the brand to build its own community of content creators. Influencer thebeautycrush continued to include a variety of Kiehl's products in her daily regimen after the trip, creating \$317.3K in EMV for the brand over the time frame monitored.



Thebeautycrush shares a shot of Kiehl's' sunscreen from her educational Ibiza getaway, earning 22.1K likes.

Lush and Caudalie Pamper Individuals with On-Brand Experiences

While Kiehl's pampered its influencers in a group abroad, Lush and Caudalie invited its influencers to one-on-one spa days and brand-relevant, exclusive all-access trips to their headquarters.



TessHolliday Instagrams her afternoon tea with Lush, garnering 15.7K likes.

In line with its belief of taking the time to love and spoil one's self, Lush treated influential body-positive model Tess Holliday not only to a spa day at its Oxford location, but also to tea at the upscale Sketch in London. As a result, the grateful influencer and founder of Eff Your Beauty Standards created \$243.1K EMV worth of content about her day with Lush. Animal advocate and influencer Phoebe Dykstra experienced Lush's fun, quirky nature along with its emphasis on natural, handmade products: Lush invited Dykstra to its Vancouver base, where the personality got to wear a human-size Bath Bomb costume and then mix her own Experimenter Bath Bomb while donning a Lush uniform embroidered with her name. By consistently inviting influencers to be a part of the company's family through meaningful, brand-relevant approaches, Lush consequently benefits from their genuine and longstanding support. Furthermore, the on-brand personalities of these selected influencers help Lush maintain an authentic, defined personality to everyday consumers.

French skincare brand Caudalie, which ranks #9 in skincare EMV, also invited influencers to its spas for luxurious facials and treatments that inspired

grateful content creation. During New York Fashion Week, beauty influencer Camila Coelho Instagrammed a photo of herself receiving top treatment at Caudalie's Plaza Hotel spa; the spa tub she rested in was surrounded by bronze walls and glowing candles. The post alone garnered 52.2K likes and \$100K in EMV and reinforced Caudalie's associations with self-indulgence and luxury. A loyal ambassador, Camila proved her dedication to Caudalie by making four videos, all featuring the Beauty Elixir, that entered the brand's top 25 EMV-generating posts for the time frame monitored.

Like Lush, Caudalie emphasized its dedication to transparency and high-quality ingredients by inviting influencers to participate in making products. Devin Brugman, the co-creator of the A Bikini a Day blog, posted an Instagram of herself making "her own body scrub" at a Miami Caudalie spa that garnered 12.4K likes and \$63.4K in EMV. Caudalie, which recently partnered with scientists at Harvard University to forward the scientific innovation of its products, extended its on-brand experiences to everyday users as well: the brand held a series of "Celebrate the Harvest" nights across the country, complete with free mini treatments and wine tasting, to promote its launch of the anti-aging Resveratrol Lift



Camilacoelho's snapshot of her indulgent afternoon at a Caudalie spa earns 52.2K likes.

collection, as well as a host of general brand events that users could register for through Eventbrite. Making these on-brand events welcome to consumers, not just influencers, strengthened the authenticity and accessibility of the Caudalie brand, while still maintaining its value proposition of upscale self-indulgence.

Murad Pays Individual Attention to Influencers

During the summer, Murad continued to make strides in the social landscape with its dedication to maintaining sustainable relationships with influencers.

By treating its influencers as individuals and getting to know them as more than consumers, Murad has effectively built a lasting community of brand advocates. The skincare leader regularly reposts user-generated content on its owned social profiles, not just simple shots of its products.

In addition to the thoughtful birthday gifts, spa days, and genuine influencer support discussed in May's Skincare La Mode, Murad gained a new loyal influencer by anticipating her individual needs. After beauty blogger *ilikewyle* spoke extensively of her love for the Essential-C line in multiple videos earlier this year, Murad took notice of her attachment to the products and sent her the complete collection as a gift. *Ilikewyle*, no longer having to repurchase the line herself, posted a shot of the products, thanking the brand and calling Essential-C her "skincare holy grail." She also indicated that the post was #notsponsored, writing instead: "#ijustlovethisstuff." Not only did this showcase Murad's generosity and thoughtful attention to the influencer's individual needs and preferences, it also created a grateful and emotionally invested ambassador in *ilikewyle*, who generated \$168.2K in EMV.



Desimakeup included Murad products in a Get Ready With Me "Date Night" video and posted an Instagram featuring those same go-to products, garnering a total of \$408.6K in EMV for the brand. Though Murad did not reach out to her in the time period monitored, its past treatment of the influencer (birthday gifts, spa days, brand events) continues to pay off with the longevity of her loyalty. Tenipanosian, yet another notable longtime friend of the brand, generated \$170.6K in EMV by featuring the Invisiblur Skin Perfector in multiple Instagrams.

Ilikewyle garners 15.6K likes with her shot of Murad's Essential-C line, her "holy grail."

Part 2:

Emphasizing Natural, Personal, and “Unscripted” Beauty

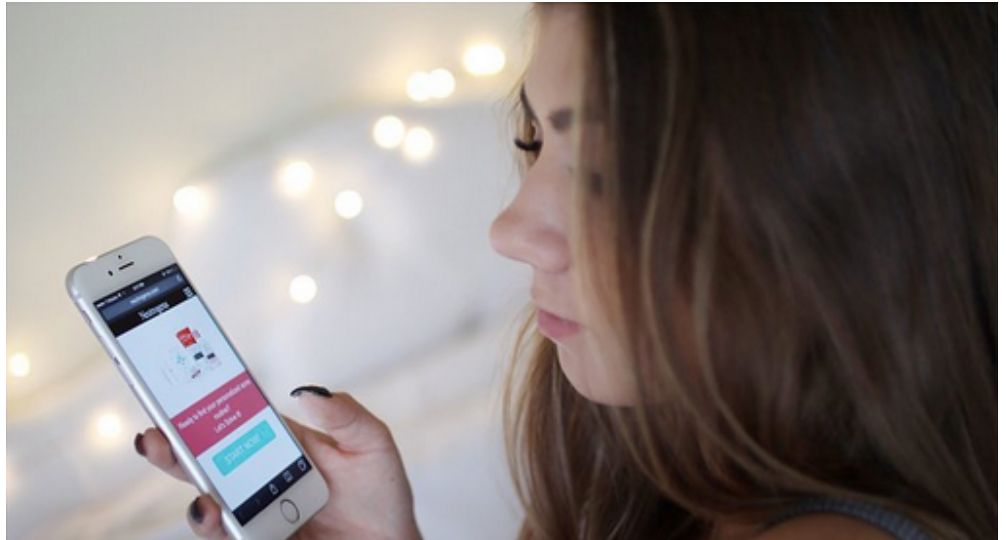
As spring came to a close and summer began in full swing, several leading skincare brands ran initiatives that promoted the idea of natural, unique, and “unscripted” beauty: beauty that is less focused on cosmetics, products, and specific “looks,” and more focused on what makes a beautiful life: health, family, friendship, and personal accomplishments. In these storylines, healthy skin and a healthy skincare routine serve as an empowering jumpstart or accessory to a “beautiful,” fulfilling life, but do not define whether someone is beautiful or not. Neutrogena, Aveeno, and Clinique all placed the user’s individuality at the center of their campaigns. Neutrogena’s new “Let’s Solve it” initiative aimed to pinpoint and tackle users’ unique skin needs; Aveeno shelved upfront product placement while asking followers to contribute photos of beautiful family moments for the chance to win an Aveeno photoshoot and a year’s worth of product; and Clinique turned to a younger demographic with a “#faceforward” campaign that focused on achieving one’s passions and career goals.

Neutrogena Tackles Acne with Honest Voices and Real Faces

In August, Neutrogena mobilized followers with a streamlined social campaign reinforcing the idea that beauty starts with empowerment through healthy, makeup-free skin.

The multi-faceted online campaign, called #LetsSolveIt, was launched to increase awareness of the brand's new line of acne-fighting products and Neutrogena's recognition and concern for unique and personal skincare needs. Neutrogena sponsored a handful of influencers to introduce their followers to a new feature on its website, the "Solve My Acne" quiz, which helps individuals design their personal skincare routine with the brand's skincare products. The Solve My Acne quiz provided an intimate experience between brand and quiz-taker, with the recommendations page incorporating a tutorial created by a beauty blogger with the same skin type. In these videos, the bloggers show viewers exactly how to use the recommended products, and share their own proven skincare secrets.

Some of the most valuable Instagram posts created over the summer feature influencers either applying Neutrogena products or showing off healthy, glowing skin, thanks to the interactive quiz's personalized recommendations. Influencer [sienna_mirabella](#)



shared with her followers a series of Instagram posts that show her interacting with Neutrogena's acne products and promote the #LetsSolveIt campaign.

#LetsSolveIt accomplished more than just acknowledgment of the unique characteristics of every woman's skin, or a new level of sophistication in interactive digital media. Despite the fact that #LetsSolveIt was a paid campaign, the inclusion of influencers showing off their bare skin -- with different degrees of actual acne -- added a layer of honesty and relatability to Neutrogena's recognition of their users' real skin concerns.

Sienna_mirabella, pictured using Neutrogena's Solve My Acne Quiz, promotes the brand's #LetsSolveIt campaign, netting 24.3K likes.

Aveeno Promotes Family and “Unscripted Beauty” Online

Although Aveeno, which earned \$1.9M in the four months monitored, does not rank in the top 10 skincare brands, it sparked social media success with a contest centered around a less conventional definition of beauty.

The brand’s jump in Instagram activity during the summer months was primarily fueled by the skincare brands, it sparked social media success with launch of its #UnscriptedBeauty contest in late May, an effort to promote both “natural authentic beauty” and “a positive outlook during moments/situations that don’t always go as planned.” Users were invited to post a photo, tagged #UnscriptedBeauty, #Aveeno, and #contest, of either themselves or their family in a moment of “unscripted beauty” (in Aveeno’s words, an “unscripted, candid beautiful moment”) on Instagram, Twitter, or Facebook. Along with 12 18-ounce bottles (“a year’s worth”) of Aveeno Daily Moisturizing Lotion, the winner would also receive a photoshoot of themselves and their family at home. The images could then be used in a future Aveeno marketing campaign.

To spread awareness about the contest, Aveeno partnered with a variety of influencers to promote the contest. Beauty and lifestyle mommy bloggers *hellofashionblog* (500K followers on Instagram), *northwestmommy* (118K followers), and *aprilathena7* (151K followers) all posted multiple #UnscriptedBeauty photos of their own to Instagram, encouraging their followers to spread the importance of authentic, natural, family-oriented beauty by participating in the #UnscriptedBeauty contest. Some of the posts featured specific Aveeno products as well.

Though the influencers were explicitly sponsored -- their posts were hashtagged either #spon or #ad -- several elements of the campaign helped render the partnerships, and contest, more authentic and meaningful. As examples of unscripted beauty, *hellofashionblog* and *northwestmommy* featured high-

quality, but heartwarming, photos of their young children and pets that were obviously taken with love and implied that the bloggers trusted the brand enough to use its products on their families. The wide-ranging diversity of the influencers -- *hellofashionblog* maintains an upscale, ultra-filtered Instagram that shows off sleek Outfit-of-the-Day ensembles and luxurious getaways; *northwestmommy*’s vibrant, editorial-quality photos frequent plaids, animals, and nature; and Asian American mommy blogger *aprilathena7*’s Instagram is filled with photos of family and friends -- not only expanded Aveeno’s reach to a wider net of potential customers, but also helped unify Aveeno supporters under one belief: that



Hellofashionblog posts an intimate moment of “unscripted beauty,” earning 6.5K likes for Aveeno.

family comes first, and that natural beauty is the best kind of beauty. The brand's #UnscriptedBeauty contest conveyed a sense of caring and honesty that its followers felt good in perpetuating.

By the contest's end, #UnscriptedBeauty had produced content worth over \$350.7K in EMV. With the help of Aveeno's sponsored influencers, wide communities of users and followers were reminded or made aware of the brand's fresh, wholesome, and "caring" products. A new sense of community also formed around the contest on Aveeno's Facebook page. After the brand announced the winning photo, which showed a baby taking her first steps into her grandparents' arms, dozens of fellow users and participants congratulated the baby's mother on her moving photo. Professional photographer Danielle Guenther, who would be responsible for the family's photoshoot, commented that she couldn't wait to photograph the family -- giving the Aveeno brand and its initiatives a very "real" sense of caring. Ultimately, Aveeno's #UnscriptedBeauty campaign proved a success because it united users in an effort to celebrate one of the brand's defining value propositions.

Burt's Bees, which ranks #5 in EMV generation, held a similar contest to Aveeno's #UnscriptedBeauty campaign in June. For its "ABC's of Baby Bee" photo contest, the brand asked parents to submit non-professional photos of their infant children in up to four categories: "A is for Asleep," "B is for Beaming," "C is for Cozy," and "D is for Day." The



brand would select a winner in each category, as well as an overall winner, and award each winner's family up to \$5,000 in cash, a professional photo shoot, and Burt's Bees baby products. Though user comments on the brand's promotional Facebook posts communicated substantial interest in the contest, the Baby Bee contest did not perform as well as it could have, both in sustaining conversation about the brand and in creating a community around its dedication to natural skincare for the family. Instead of asking users to post their entry photos to Instagram or Facebook, Burt's Bees required entrants to submit photos privately through its website. As a result, the brand significantly restricted the number of individuals who could have learned about the contest or the brand.

Northwestmommy's makeup-free shot for Aveeno's #UnscriptedBeauty campaign nets 1.1K likes.

Clinique Empowers Younger Users with Genuine Emphasis on Career Goals

Clinique's #faceforward initiative, centered around its three-step skincare system, taps into a distinctly "millennial" version of endorsement, putting "feelings" first and products second.

The campaign, with the tagline "Make a promise to the future. And put it out there," focuses on the idea that young women can accomplish whatever they put their mind to, and that beauty can begin with the confidence that clean, healthy skin can give -- not a heavy amount of makeup, or a particular kind of fashion. Fittingly, the three women that Clinique selected to headline the campaign are all established influencers in their own right, fundamentally dedicated to their careers and to elevating women in their communities. Tavi Gevinson, a first-wave fashion blogger wunderkind and feminist publication founder, has a depth that extends beyond her famous face; she does not just pose with products, but incorporates the brand into her own adventures and endeavors. Likewise, influencers Margaret Zhang and Hannah Bronfman are women who have shaped their own paths, inviting the brand along for the ride and not the other way around.

On Clinique's #faceforward webpage, Gevinson, Zhang, and Bronfman offer both moments of genuine vulnerability and bits of advice in three individual videos. Gevinson admits that she's not the "most terribly confident person out there" but maintains that making beauty and fashion decisions should feel like a "superpower," not a "source of anxiety or about pleasing people." Zhang expresses that women should focus on "[creating] beautiful work"; that's "her happy place." Though each video ends with a shot of a different Clinique three-step skincare system (for either dry, normal, or oily skin), none of the three influencers talk about Clinique or any of its products

in their video. This delay in product endorsement lends a more authentic nature to Clinique's message of female empowerment.

Over the four months monitored, the campaign drove \$1.1M in EMV and associated the brand with impressive young women who are deeply invested in the confidence and success of their female peers. Notably, the hashtag #faceforward was used by more influencers than just the campaign's three faces, including Petra Collins, Tavi Gevinson's friend and longtime collaborator on their magazine.



#Faceforward ambassador
margaret_zhang earns 10.9K
likes for her snapshot of natural
beauty.

Part 3:

Community Recognition and Outreach

Summer's top EMV-generating skincare brands not only stepped up to pamper influencers and promote diverse ideas of beauty, but also continued to reach out to various communities and causes that were previously paid less attention by major beauty brands. Lush earned support from influencers and followers for its own support of the gay community, along with more esoteric or fun but still-important causes like sharks, frogs, and puppies. Neutrogena remained strong in its support and promotion of the Latina community, taking care to involve the community in the launch of its acne-fighting #LetsSolveIt campaign.

Lush Reaches Out to Diverse, Different Causes

Lush, the top skincare brand with \$19.8M in EMV, differentiated itself in terms of community outreach by partnering with a unique variety of brands and striving to make each campaign creative, genuine, and visibly well thought-out.



Wishwishwish shares her gold bar of Lush's Love Soap, earning 3.6K likes.

In June, Lush made the “Love Soap,” a bright gold soap bar embossed with “#GAYISOK,” with profits benefitting grassroots charities working towards equal rights. The #GayIsOk campaign generated \$262.3K in EMV. During Shark Week in August, Lush partnered with the Discovery Channel, selling exclusive soap bars designed to raise awareness of the illegal killing of sharks. The campaign was promoted with the hashtag #finfree, and each fun, sea-blue bar of soap featured a small black soap fin. The picture-worthy, campaign-specific designs of these two soap bars -- a glittery, embossed square and a finned, sea-blue bar -- served two extremely fruitful purposes. They gave customers the opportunity to post a vibrant, catchy Instagram, generating EMV for the brand and demonstrating to influencers and everyday users Lush’s genuine dedication to each individual cause. In turn, these influencers and followers felt more compelled to post about their for-charity Lush purchases. Blogger tenipenosian, who has 392K followers on Instagram, found the #finfree soaps that Lush sent her so unique and meaningful, that she posted a photo to Instagram and encouraged her followers to

support the cause. The Instagram earned \$39.5K in EMV, and Lush proudly reposted the Instagram.

In addition to its #GayIsOk and #finfree initiatives, Lush continued to promote its Charity Pot program, now in its eighth year. The Charity Pot is a hand and body lotion whose proceeds and production help a number of different various charities, from human rights organizations to environmental projects. (According to its website, the Charity Pot program has donated \$10 million to over 850 charities in 42 countries.) The lid of every “pot” of lotion features a photo of the specific charity that very lotion’s sale will support. In August, grav3yardgirl featured the Charity Pot in a Lush haul video that earned \$134.1K in EMV. Despite the fact that grav3yardgirl shared that she wasn’t impressed by the lotion itself, she remained genuinely excited that her purchase would help the Save the Frogs charity. Grav3yardgirl added that Lush’s partner charities were always groups that she was interested in supporting, including an organization that focused on bees.

Rather than appearing directionless or unrelatable due to its wide range of causes, Lush has harnessed its support of smaller or more obscure charities and molded it into a value proposition that customers have come to admire



and expect: Lush cares about all causes that have passionate people behind them, regardless of their size or popularity. In supporting Lush’s diverse, original partnerships, users can feel one-of-a-kind and influential themselves. By extension, they, as consumers, may feel closer to Lush as well. If the brand is so accepting of so many charities and causes, isn’t it only natural that it would welcome customers from all walks of life as well?

Lush Instagrams a photo of its employees for the #finfree campaign, garnering 70.1K likes.

Neutrogena Sustains Genuine Support of Latina Community

Neutrogena's promotion of the Solve My Acne quiz coincided with the launch of BeautyConLA, where the brand was represented by Neutrogena influencer ambassadors.

In classic Neutrogena fashion, the brand partnered with Teen Teen Vogue to throw an over-the-top party to celebrate the arrival of BeautyConLA. At the party, guests were given an exclusive look at new Neutrogena products. Neutrogena was represented by its newest brand ambassador, Eiza Gonzalez, an up-and-coming actress with roots in the Hispanic community. Eiza's attendance at the party helped Neutrogena bridge the gap between the new #LetsSolveIt campaign and its ongoing support of the Latina Bloggers Connect community, discussed in May's Skincare La Mode. A significant portion of Neutrogena's social success is owed to this self-substantiated association and the brand's general involvement in the Latina community. The synchronization and consistency of Neutrogena's marketing strategy set it apart from its competitors, effectively introducing culturally relevant initiatives without marginalizing universal appeal. Ultimately, Neutrogena has succeeded at maintaining thoughtful and sincere engagement with a specific community and appreciation for the individuals who identify with it.



Newly appointed Neutrogena ambassador Eiza Gonzales posts from a party that Neutrogena hosted with Teen Vogue to celebrate the arrival of BeautyConLA, earning 37.8K likes.