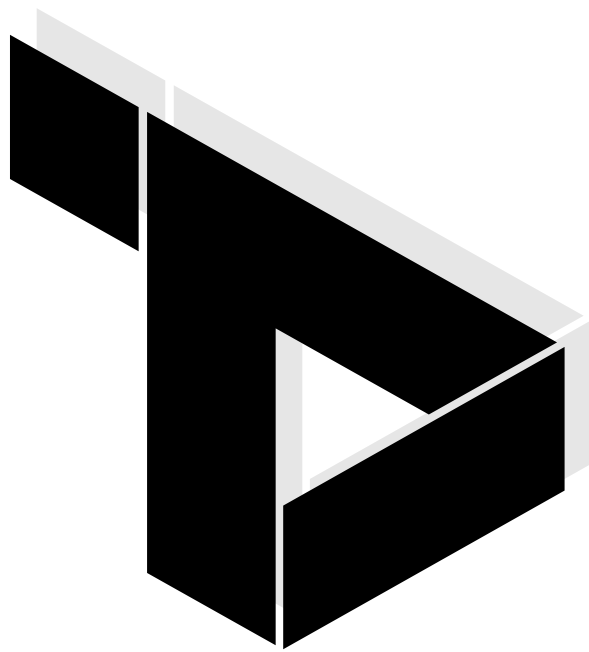


LA MODE OCTOBER

SKINCARE EDITION 2015



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.

CONTENTS

4 Top 10

5 Top 10 Brands by EMV

6 Top 10

7 Earned Media Value Performance by Channel

10 Trending EMV Performance

-- Halloween & Hashtags

11 Dove

14 Lush

15 Neutrogena

-- Brand on the Rise

16 Glossier

THE TOP 10

Earned Media Value Leaderboard

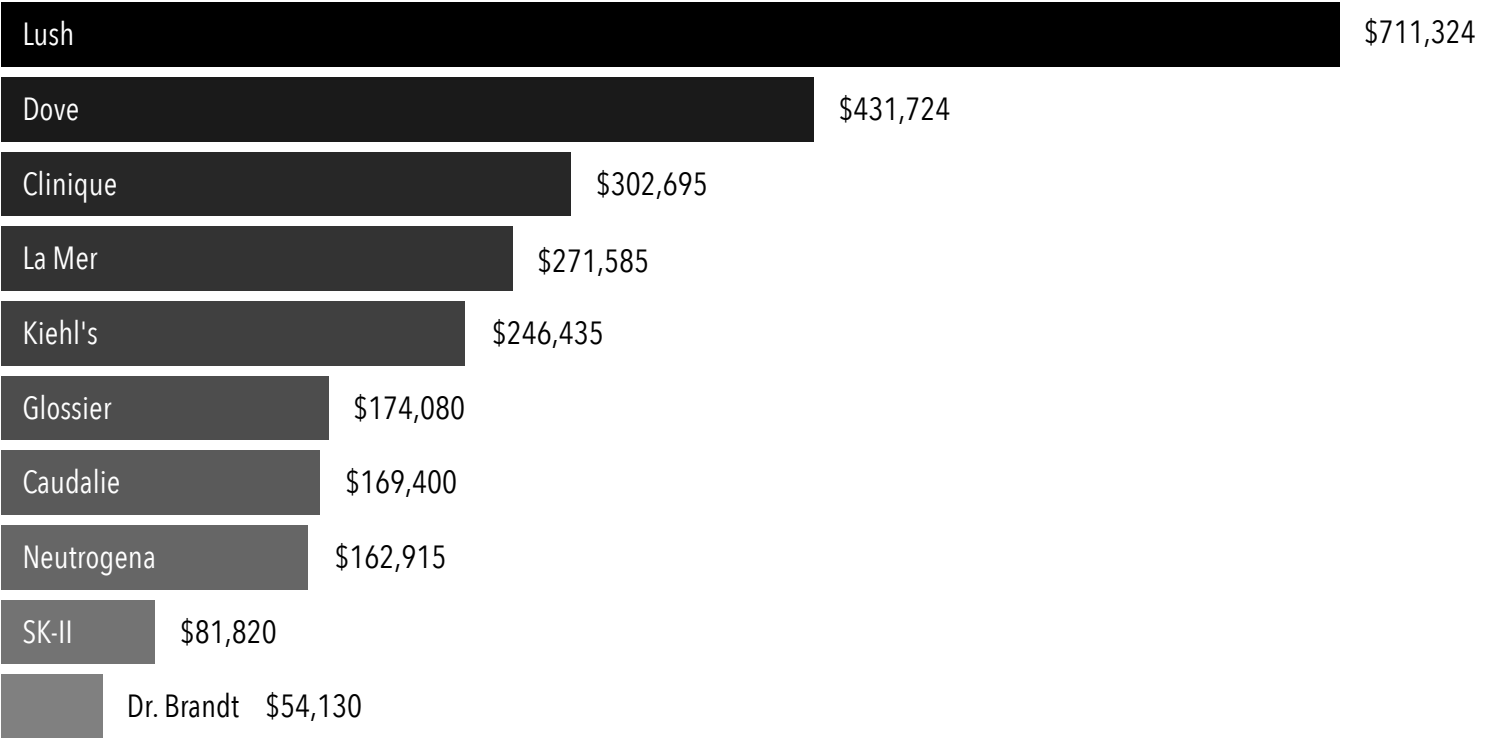
Top 10 Brands

Lush	\$5,022,555
Clinique	\$2,590,890
Glossier	\$2,160,206
La Mer	\$2,102,223
Kiehl's	\$1,553,848
Dove	\$1,523,837
SK-II	\$1,281,081
Neutrogena	\$1,244,727
Caudalie	\$1,230,036
Dr. Brandt	\$1,210,551

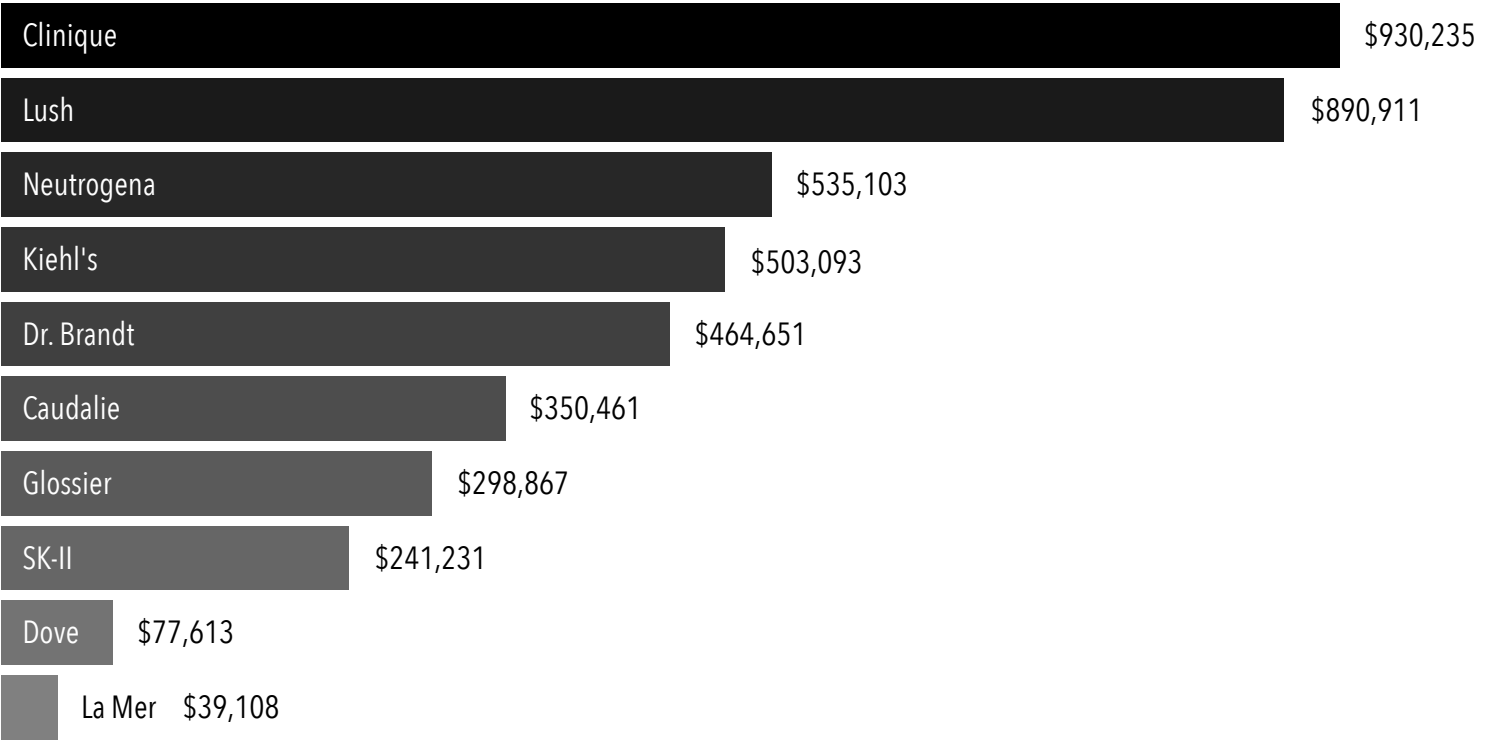
THE TOP 10

Earned Media Performance By Channel

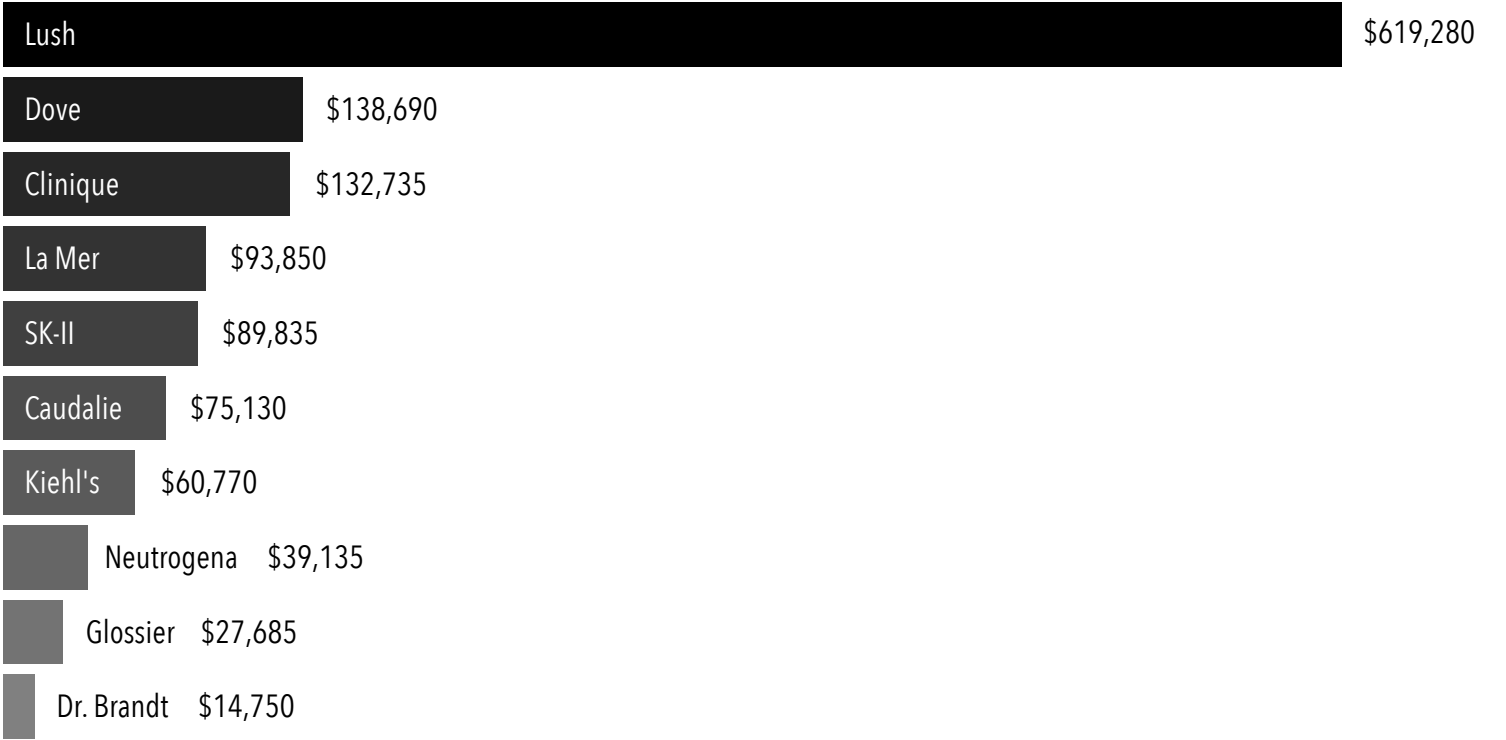
BLOG



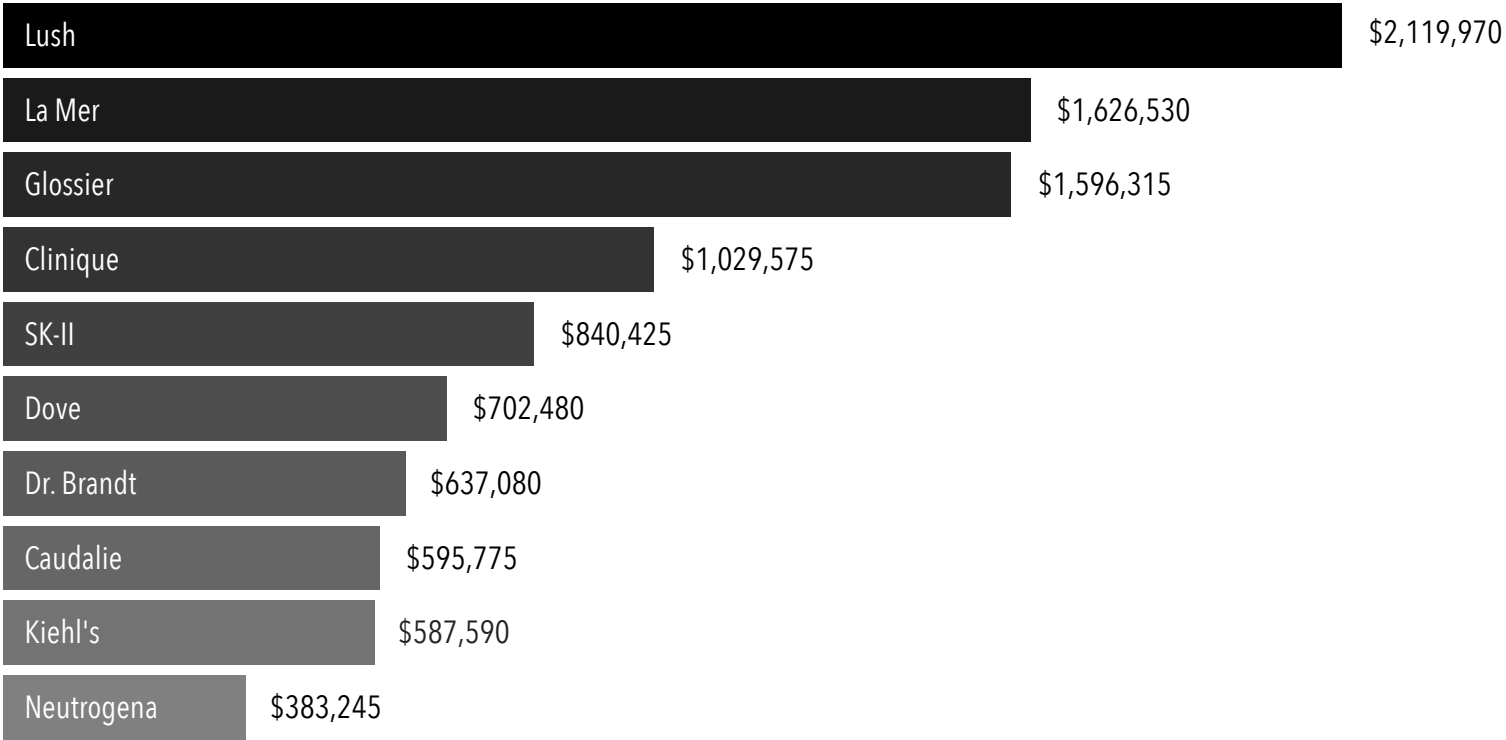
YOUTUBE



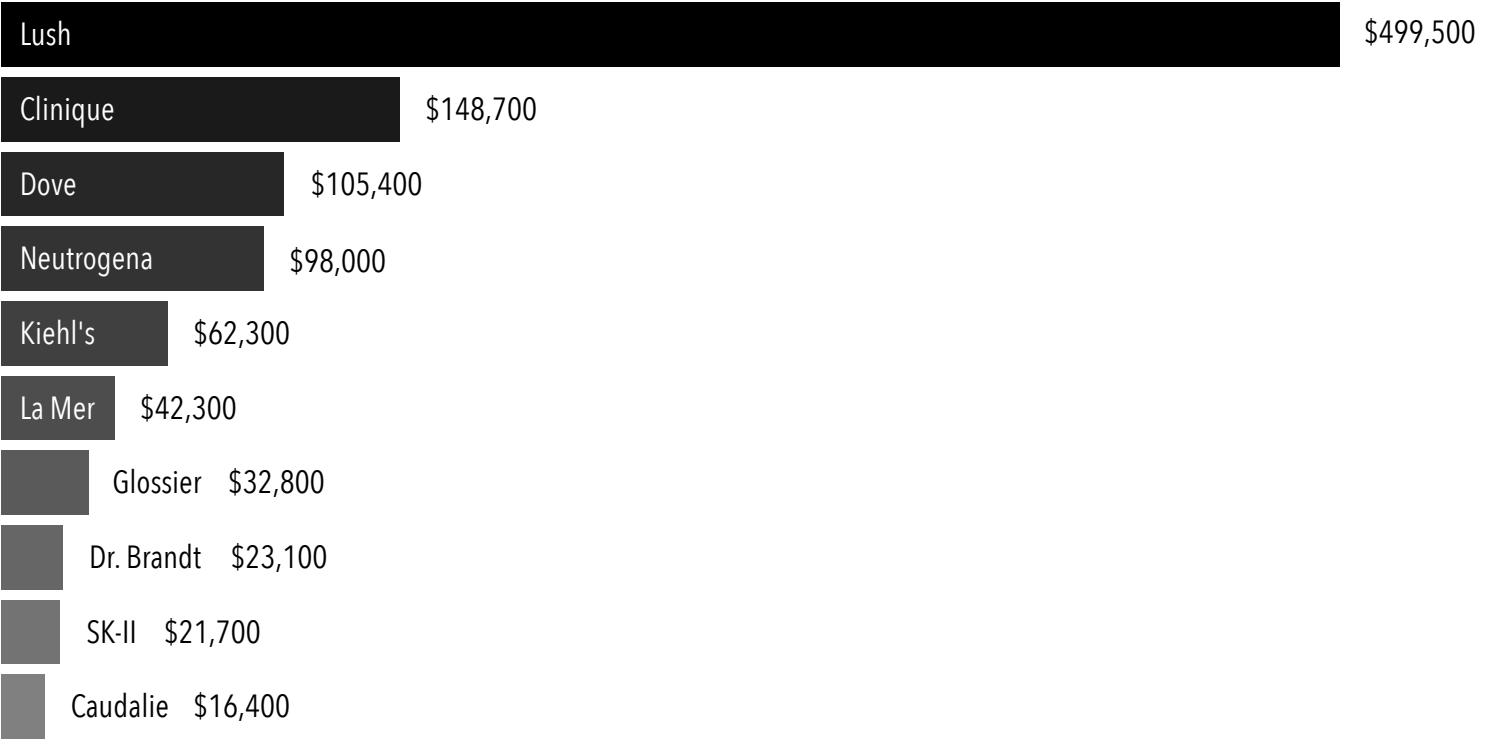
FACEBOOK



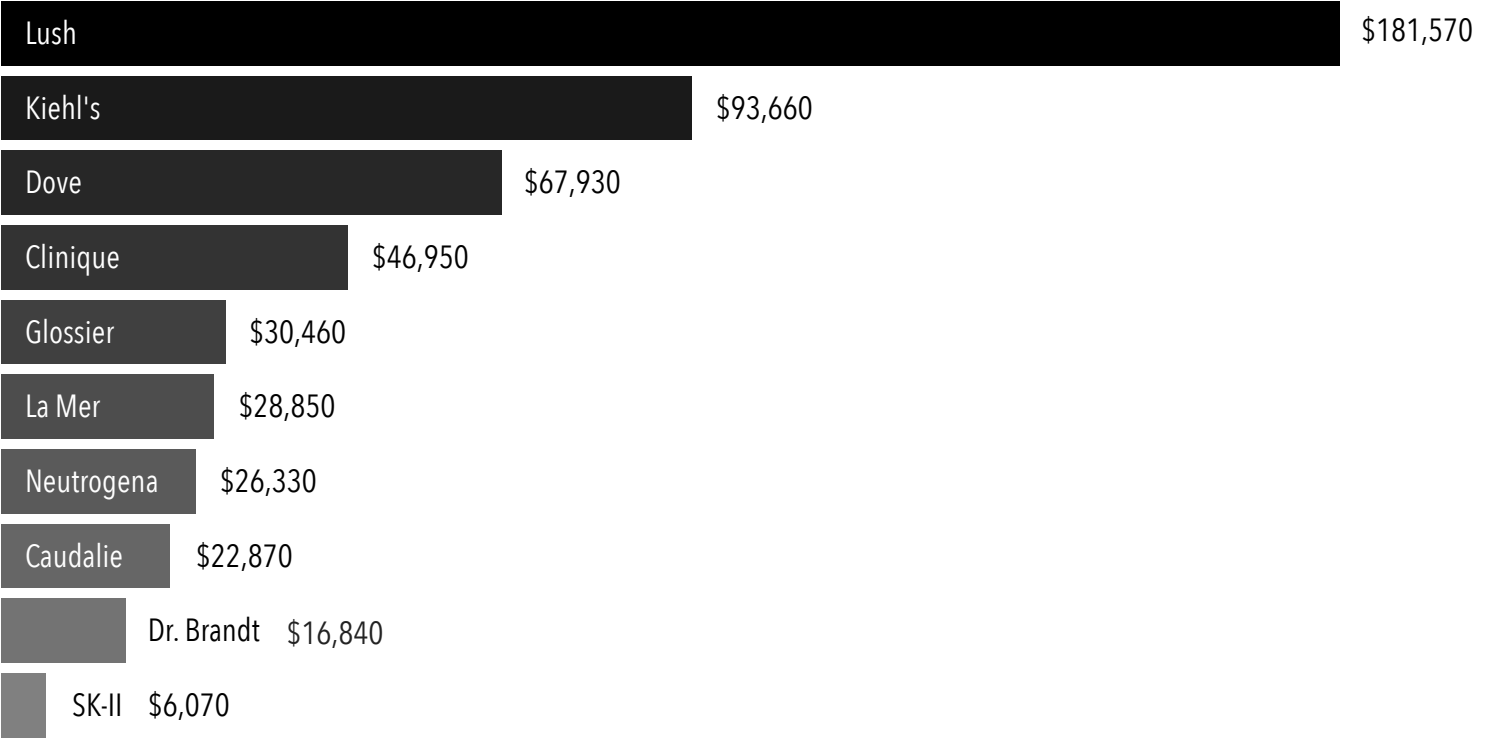
INSTAGRAM



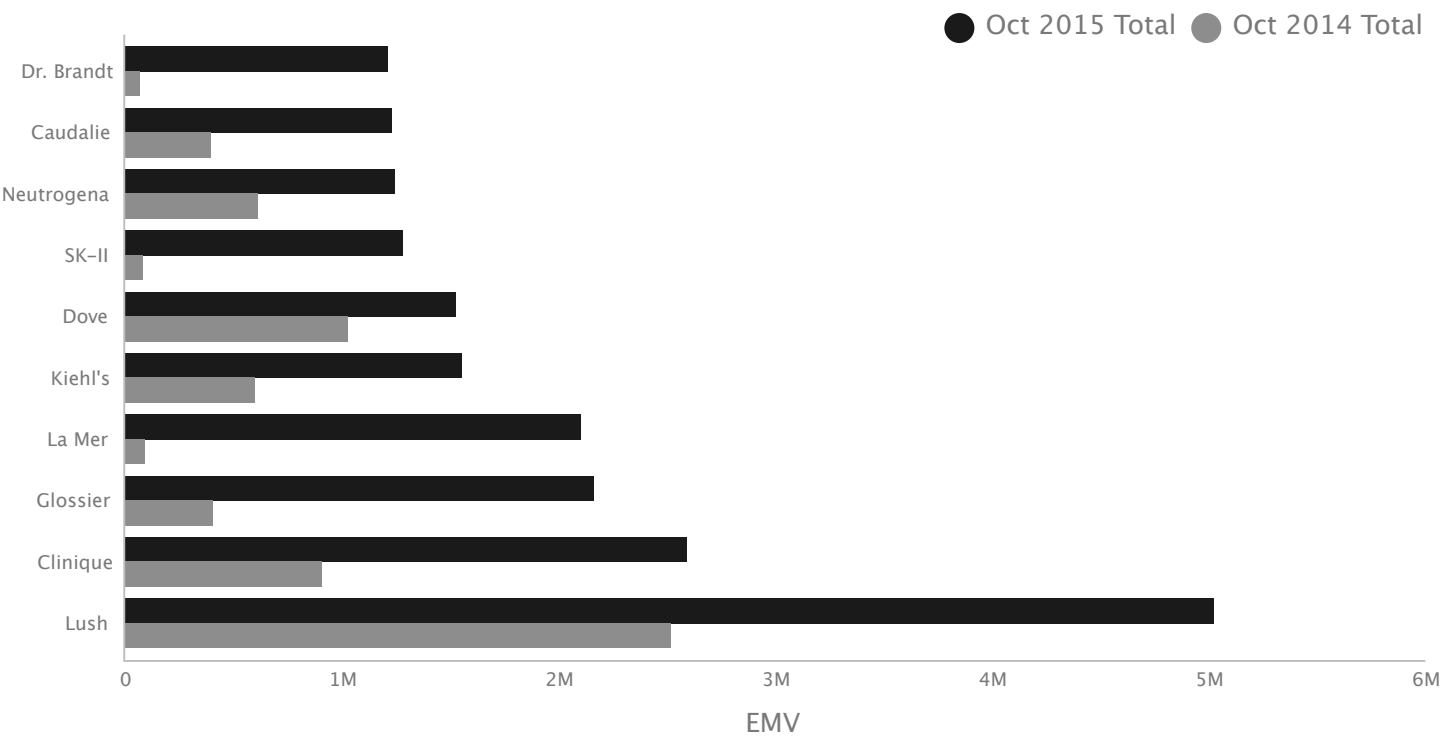
TWITTER



PINTEREST



OVERALL TRENDING EMV



Y/Y GROWTH

BRAND	OCT 2015	OCT 2014	Y/Y GROWTH
Lush	\$5,022,555	\$2,518,208	199.45%
Clinique	\$2,590,890	\$907,586	285.47%
Glossier	\$2,160,206	\$403,383	535.52%
La Mer	\$2,102,223	\$90,329	2327.30%
Kiehl's	\$1,553,848	\$594,691	261.29%
Dove	\$1,523,837	\$1,025,791	148.55%
SK-II	\$1,281,081	\$81,583	1570.27%
Neutrogena	\$1,244,727	\$612,386	203.26%
Caudalie	\$1,230,036	\$395,293	311.17%
Dr. Brandt	\$1,210,551	\$66,262	1826.91%

Halloween & Hashtags

DOVE TAPS #DOVEPARTNERS ON INSTAGRAM



Vivaluxuryblog, an official Dove partner, posts an Instagram of her favorite Dove product to celebrate National Healthy Skincare Month. The photo garnered 6.4K likes.

As one of the more recognizable and familiar skincare brands on the market, Dove's October earned media performance was significantly augmented by broader brand salience. While the brand invested in a few noteworthy digital initiatives, the implied paid nature of each post lessened its potential impact on the audience. These initiatives ultimately lacked an intimacy that would have encouraged authentic, organic content creation.

Dove's first effort involved a series of posts shared by a small community of influencers, who either mentioned the brand within the context of the individual woman's relationship with her skin, or her attachment to specific Dove products. These posts were strung together by the shared use of a single hashtag: #DovePartner. While these posts lacked an #ad or #sponsored tag, the bland #DovePartner hashtag, coupled with relatively unoriginal stories, weakened the content. Camilacoelho garnered 18.5K likes with a post depicting the popular Dove Deep Moisture Body Wash against the backdrop of a marble countertop adorned with white flowers and a string of pearls, but the somewhat generic branding of the product seemed amiss in a setup that was clearly crafted to exude luxury and sophistication. Moreover, the supporting language had a distinctly advertorial feel that promoted both Dove and the influencer's own blog.

A similar post from rachparcell fell into the same trap, with an unconvincing portrayal of the influencer's "5 Winter Essentials" shown in three shots: fuzzy pink slippers, a ceramic mug with hot cocoa, and a loofa beside the same bottle of Deep Moisture Body Wash and bar of Dove soap. While an organic post of this nature might tag brands associated with each essential, the post gave credit only to Dove. The blogger's lack of democratic support for other brands, along with the inclusion of #DovePartner, made the post appear manicured and advertorial as well.



Camilacoelho advocates for moisturized skin as a Dove partner, earning 18.5K likes on Instagram.



Dove partner rachparcell snaps her Winter Essentials, netting 6.4K likes.



Dove's second initiative appeared more creative, though gimmicky. The brand launched Dove Love Your Curls emojis, replicating the standard emoji but replacing her straight hair with curly locks. Influencer-created posts aimed to popularize the emoji as celebrating female empowerment through loving the uniqueness of one's hair. However, this ethos emerged as somewhat contrived, and the brand's connection to the message itself was lost.

Tagged once again with #DovePartner, this content came off

as promotional, with bloggers trying to increase traffic more broadly to Dove's website. Had the launch of the curly hair emoji been tied to the launch of a new curly hair product line, as opposed to Dove in general, the campaign would have been more compelling. The potential conversation about self-esteem and beauty being a source of confidence was absent because Dove failed to incorporate user-generated content that would have provided a relatable personal element, such as women describing how their unique hair makes them feel.

Mrs. Adrienne Bosh poses for Dove with her daughters to support the release of curly-haired emojis, reaching 8.2K likes.

LUSH'S #LUSHOWEEN INSPIRES CONTENT CREATION

In October, Lush again pulled out its digital ammunition with its #lushoween collection and corresponding contest. In the spirit of its Halloween-themed collection, which included products with names such as Lord of Misrule, Lush called for followers to post content showing their own #lushoween makeup and skincare transformations to Instagram and Twitter. Each week in October, the brand chose five winners to receive a generous gift bag filled with Lush goodies. The initial response from followers was extremely positive, with owned Instagrams posts promoting the contest reaching upwards of 80.0K likes each.

The contest itself drove 11.3K posts tagged with #lushoween, earning significant EMV into November. The resulting earned media varied in subject matter, from photos of the on-brand and on-theme product packaging, to shots of ranges of vibrant soaps, to self-created Halloween makeup transformations. Some influencers embraced the creative opportunity in full spirit, posting highly artistic photos of marbled water in ceramic tubs, brightly colored by Lush bath salts. (The Sparkly Pumpkin Bubble Bar, a pumpkin-shaped Bath Bomb with a flashy, sparkling exterior, proved especially popular in these artistic posts.) Through #lushoween, Lush engaged influencers in an approach that reinforced its unique value proposition as a brand, offering a fresh and visually colorful experience that “transforms” the standard bathing routine.



Teale Coco shows off her Lush-infused bath, tagging #lushhalloween and netting 5.6K likes.

NEUTROGENA SHOWS CONSISTENCY WITH #BEAUTIFULBECAUSE

Neutrogena held a contest of its own with the intention of promoting an unconventional definition of what it means to be beautiful. To enter, participants were asked to create a post on Instagram or Twitter, tagging a friend they believe is beautiful inside and out with the hashtags #BeautifulBecause and #contest. The contest ran over multiple months, beginning on August 19th and ending on October 31st, giving influencers ample time to create and engage with content. The publisher of the winning posts received Neutrogena kits filled with numerous products.

As part of the campaign, Neutrogena brought in brand ambassador and actress Bella Thorne and celebrity makeup artist Amy Oresman to host a #BeautifulBecause Beauty Makeover series, which focused on helping women learn the techniques of bringing out their inner and outer beauty. Each episode featured a pair of friends and began with a filmed interview, in which each girl was asked to describe the characteristics that they thought made their friend uniquely beautiful. The second portion of the 3-5 minute episode showed each girl having her makeup done by Oresman, who described in detail why she chose specific shades and styles to match the other girl's characterization of her friend's personality.

Despite having an on-brand mission to engender a healthy understanding of beauty among young women, the campaign was not embraced with the same enthusiasm as many of Neutrogena's past



interactive digital endeavors. On Instagram, there were a total of only 308 posts tagged with #BeautifulBecause, and not all of these were relevant to Neutrogena's contest.

From a positive standpoint, the campaign did demonstrate Neutrogena's investment in up-and-coming bloggers: two of the three winners had under 2,000 followers on Instagram, and the third had only 117. Considering that the brand has demonstrated its influence by partnering with top influencers like DulceCandy, this contest showed a democratic contrast that could encourage aspiring bloggers to take serious notice of Neutrogena.

Jeanineamapola poses with a friend for Neutrogena's filming of its #BeautifulBecause series, earning 6.3K likes.

Glossier BRAND ON THE RISE

On the rise is digital prodigy Glossier, who was later named Digital Innovator of the Year at the Beauty Inc. Awards in December. The brand successfully positions itself as the skincare line for the modern “It Girl,” embodying a unique blend of classic elegance and digital trendsetter. Not surprisingly, some of the brand’s biggest advocates, including Michelle Phan, Kristina Bazan, and We Wore What, help comprise the most influential online presences in beauty.

In addition to attracting fans through this aspirational lifestyle and self-identification, Glossier’s products have a reputation online for being high-quality and offering innovative solutions. Sonya Esman of classisinternal (1.3M followers on Instagram) equated Glossier to Chanel Skincare and Kate Somerville, referring to the brands’ products as “game changers.” Esman integrates her favorite Glossier products into Instagram photos of an editorial quality, depicting her indulgent lifestyle. A simple shot taken by the influencer of a marble countertop, showcasing skincare products from Chanel, Kate Somerville, and Glossier, alongside delicate bottles of perfume and an opulent candle, garnered 85.7K likes on Instagram. Though the image appears static and uninteresting out of context, it tells a very clear story of Glossier’s inclusion in an elite community of high-fashion trendsetters and their go-to brands.

Similar content was created by Aimee Song of songofstyle (3.1M followers on Instagram), who, like Esman, shows off her luxurious lifestyle with daily It Girl inspiration posts. Song’s inclusion of Glossier



Classisinternal shows off Glossier products alongside her go-to skincare game changers, earning 85.7K likes.



flawlessly recreated Esman's imagery, again showing a Glossier product standing as an equal beside items from luxury skincare legends La Mer, Lancome, and Shiseido. Song's undeniable display of decadence featured products on a silver platter alongside light pink roses, all resting on a marbled countertop.

Perhaps most impressive of Glossier's community of prominent beauty ambassadors is Michelle Phan, who integrated Glossier products in a significant amount of her content creation. In October, Phan ran a giveaway for two of her favorite Glossier products, the Moisturizing Moon Mask and Priming Moisturizer. Phan used these products along with Coconut

Balm Dotcom religiously in her video tutorials, each reaching upwards of 1.8M views. Though Phan's endorsement of Glossier was not uniquely enthusiastic, her ongoing inclusion of these products in her content provides a significant incentive for her followers to purchase these products for themselves.

Finally, Glossier's association with We Wore What serves as an invaluable connection to reinforce the brand's desired aesthetic and personality. Fashion gurus from the publication posted a photo from the Glossier HQ, where they stood inside the man-made "Escape Room Installation," a small corner sectioned off by silver streamers raining down from the ceiling.

Michelle Phan uses the Glossier Coconut Balm Dotcom in her "My Alter Ego" tutorial, earning 1.9M views.