

TRIBE DYNAMICS

Tribe Top 10

October 2019 US Skincare

Introduction

With social networks influencing consumer behavior more than ever, brand success has become increasingly linked to digital word-of-mouth. Tribe Dynamics helps beauty, fashion, and lifestyle brands drive high-impact earned media, connecting the dots between influencer conversation and consumer interest. Our advanced marketing technology allows brands to identify and effectively manage relationships with scaled communities of passionate content creators. Earned Media Value (EMV), our proprietary metric for measuring the online engagement of influencer content, has become the industry standard for evaluating the performance of digital earned media at the brand level and across the competitive landscape.

Tribe Top 10, our monthly publication series, ranks the top beauty and fashion brands in earned media performance and reveals exclusive insights into trending content, products, and brands. We publish, and work with brands, in Cosmetics, Skincare, Haircare, Luxury, Non-Luxury Fashion, and Fashion Retailers in the U.S., as well as in 13 international markets. Visit TribeDynamics.com for full access to our reports.

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What Is EMV?

Earned Media Value, or EMV, is Tribe Dynamics' proprietary metric for quantifying the estimated value of consumer engagement with digital earned media. Our holistic approach assigns a unique value to a piece of content based on the engagement received from followers and consumers. This value is then attributed to the specific brands mentioned within the post. EMV can be used to evaluate the earned performance of individual marketing campaigns and benchmark brands within the competitive landscape.

Based on content from 120,000 of the most influential content creators across 14 country-specific markets, EMV reveals brands that are not just capturing consumer interest, but poised for significant growth.

Posts by:

- Influencers
- Brands
- Retailers
- Publications

On platforms including:

- Instagram
- YouTube
- Facebook
- Pinterest
- Twitter
- Websites
- Blogs

Engagement via:

- Comments
- Tweets/Retweets
- Favorites
- Likes
- Pins/Repins
- Shares
- Video Views

Glossary of Terms

Influencer Tiers

Powerhouse Influencer

Ambassador with over 1M followers on their primary channel.

Established Influencer

Ambassador with 300k to 1M followers on their primary channel.

Mid-Tier Influencer

Ambassador with 100k to 300k followers on their primary channel.

Micro-Influencer

Ambassador with fewer than 100k followers on their primary channel.

Community Metrics

Community Size

The total number of ambassadors who created content about a brand within a given time period.

Posting Frequency

The average number of posts created per ambassador for a brand within a given time period.

Ambassador Potency

The average amount of EMV driven per ambassador for a brand within a given time period.

Other

Posting Consistency

The percentage of influencers in a brand's ambassador community who also mentioned the brand during the previous quarter (denoted by "one-quarter posting consistency"), previous two quarters ("two-quarter posting consistency"), or previous three quarters ("three-quarter posting consistency").

Sponsored EMV

A post is labeled "sponsored" if it contains hashtags or language that denote a sponsorship, such as "#ad" or "#spon."

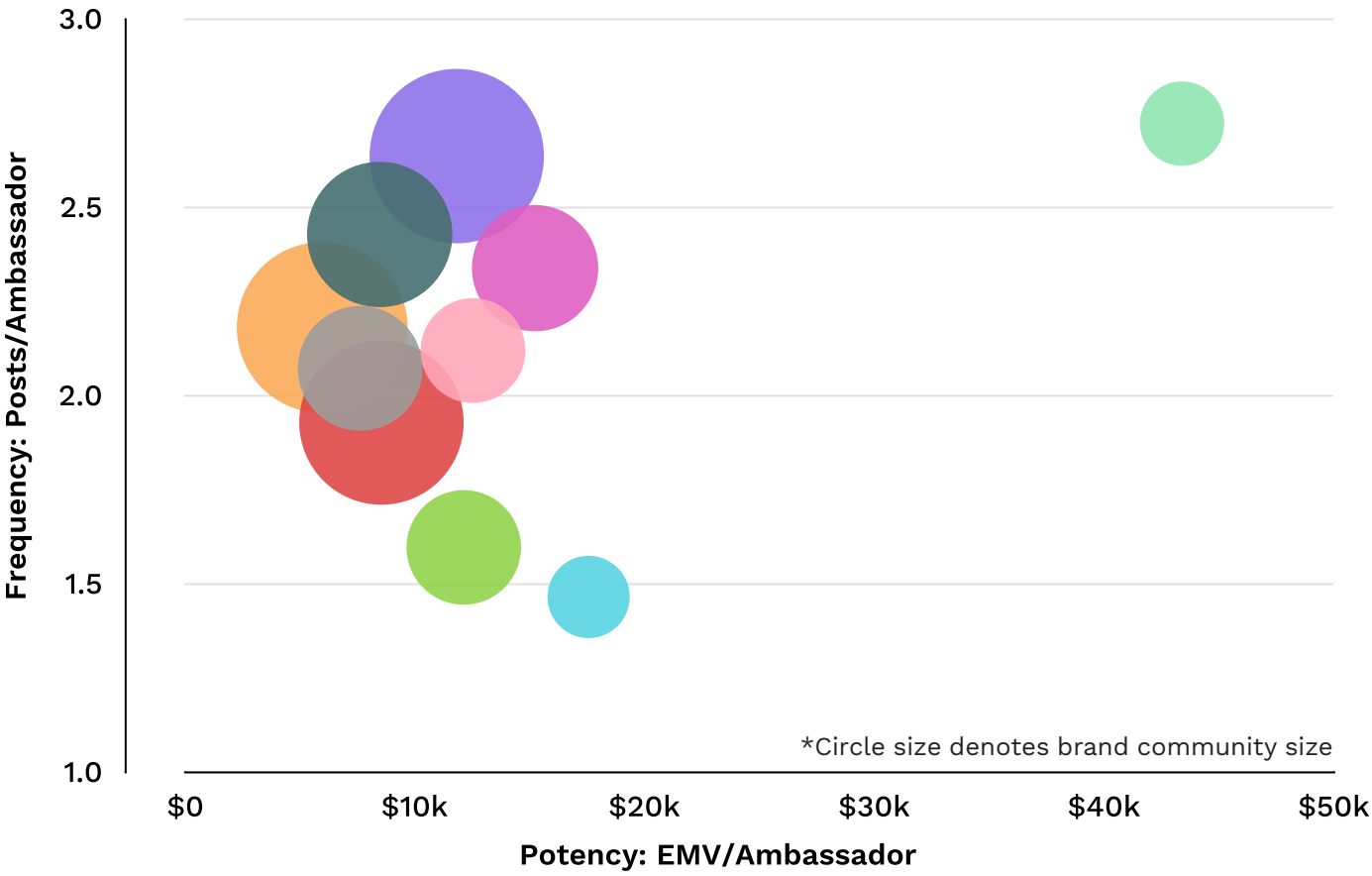
Top 10 Skincare Brands

Rank	Brand	October 2019 EMV	MoM
1st → 0	Tatcha	$7,261,673	-18%
2nd → 0	Farsáli (Skincare)	$6,209,734	3%
3rd → 0	Ole Henriksen	$4,902,226	-1%
4th → 0	Fresh	$4,671,661	2%
5th → 0	Pixi Beauty (Skincare)	$3,617,040	-13%
6th ↑ 1	Drunk Elephant	$3,527,318	3%
7th ●	Clinique (Skincare)	$3,212,789	18%
8th ↓ 2	Fourth Ray Beauty	$2,778,219	-32%
9th → 0	Paula's Choice	$2,398,462	-20%
10th → 0	Foreo	$2,393,908	-17%

● This brand was not in the previous month's Top 10.

Top 10: Community Metrics

Community Size, Frequency, and Potency



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Tatcha	612	2.6	$11,865
Farsáli (Skincare)	143	2.7	$43,425
Ole Henriksen	321	2.3	$15,272
Fresh	544	1.9	$8,588
Pixi Beauty (Skincare)	425	2.4	$8,511
Drunk Elephant	587	2.2	$6,009
Clinique (Skincare)	264	1.6	$12,170
Fourth Ray Beauty	221	2.1	$12,571
Paula's Choice	313	2.1	$7,663
Foreo	136	1.5	$17,602

Leaderboard Highlights

A Closer Look at Skincare



Clinique Skincare

After nearly breaking into the Top 10 every month in 2019, Clinique skincare re-entered the rankings for the first time since August 2018 at No. 7 with $3.2M EMV—an 18% month-over-month growth. The brand inspired content creation around October's Breast Cancer Awareness month, pledging to donate $10 to the Breast Cancer Research Foundation for every post tagged #TakeTheDayOffChallenge. The hashtag garnered $666.8k EMV via 18 influencers as Clinique skincare's No. 2 October tag behind #ad ($963.3k EMV), while the Take The Day Off collection emerged as the brand's top range with $870.4k EMV.



Notable Brand: Laneige

Though it narrowly missed the Top 10 with $1.9M EMV, Laneige enjoyed a 12% month-over-month growth that outpaced the Top 10's average 8% MoM decline. The brand stirred up influencer buzz by releasing limited-edition "Mint Choco" and "Sweet Candy" flavors of its hero Lip Sleeping Mask. The product accrued $895.2k EMV in October, up from its $626.5k EMV haul in September, and accounted for 47% of Laneige's EMV total this month. Many influencers who mentioned the lip mask also tagged their content #ISleptWithLaneige, which drove $323.8k EMV as the brand's top hashtag.



Notable Brand: Glossier Skincare

Glossier skincare's $1.2M EMV October total landed outside the Top 10, but represented a notable 37% month-over-month EMV growth. This increase stemmed in part from the launch of the Futuredew oil serum hybrid, which scored mentions from 99 content creators to garner $450.1k EMV as Glossier skincare's top October offering. YouTuber Michelle Choi ranked as Futuredew's top earner with $54.2k EMV, sharing that she uses the product as a "2-in-1 serum and moisturizer" and enthusing that it "simplifies everything."

Spotlight

What stood out in Skincare this month?

Skincare Brands Drive Growth With Halloween Makeup Removal

While top skincare brands like Tatcha and Farsáli skincare featured in October's slew of #HalloweenMakeup looks (the hashtag generated a respective $814.5k EMV and $508.3k EMV for the two brands), skincare brands outside the Top 10 drove notable growth by helping influencers take off their heavy makeup creations at the end of the night. For example, Neutrogena skincare accrued $1.9M EMV this month, a 60% increase from September, thanks largely to conversation around its hero Makeup Remover Cleansing Towelettes. The product, which boasted limited-edition, sugar skull-printed packaging in October, garnered $395.5k EMV from 52 influencers as Neutrogena's No. 1 offering, up from its $285.3k EMV via 33 content creators last month. Top towelette ambassadors including Trevor Barrett (@trevor.j.barrett) and Nicol Concilio (@nicolconcilio) shared sponsored posts demonstrating how they used the wipes to remove their intense Halloween glam.

Garnier skincare also enjoyed a boost from Halloween content, collecting $1.8M EMV in October—a 43% month-over-month growth. The brand saw enthusiasm around its top-ranking Micellar Cleansing Water range: the line netted $868.7k EMV from 58 influencers, including Carolina Gonzalez (@cgonzalezbeauty), who credited the micellar water for "helping me keep those lines #sharp" in her Manga-inspired look. Mentions of "Halloween" contributed $297.4k EMV to the product's total.

And though not makeup removal, Lush inspired spooky self-care content with the launch of its Halloween collection, which included a pumpkin bath bomb and ghost-shaped bar of soap. Mentions of "Halloween" drove $409.3k EMV of Lush's $1.6M EMV October total, a 32% MoM EMV growth.



@trevor.j.barrett via Instagram