

BEAUTY'S
POWER
BRANDS

SKINCARE

1
NEUTROGENA

• **NEUTROGENA IS SINGING** the blues—turquoise blue, to be exact, which is the signature color of its booming Hydro Boost moisturizing franchise. Hydroboost grew 29 percent for the 52 weeks ending June 17, 2018, according to IRI, helping to boost the entire category. The brand also showed it can innovate in myriad areas—“from being a first to mass market launch with an iPhone-based skin analysis tool to an Ulta exclusive makeup collab with spokesperson Kerry Washington. All that innovation garnered buzz—Neutrogena garnered close to \$20 million in earned media value on social media, according to Tribe Dynamics, and also amassed an impressive 11 awards from a wide array of magazines.

2
SK-II

• **WITH A REPORTED** \$2 billion in global sales, SK-II is the shining star of P&G's beauty portfolio, posting its 15th consecutive quarter of growth with a 30 percent increase for the fiscal fourth quarter announced in July. Digitally, SK-II excels at creating compell-

ing global campaigns, like the 2017 “Marriage Market” series. Closer to home, #bareskinproject, fronted by actress Chloë Grace Moretz, in which women reveal their faces sans makeup, is resonating equally as well. Parent P&G feels so bullish about the performance, it's going deeper into prestige skin care—with the acquisition of First Aid Beauty, which it announced in late July.

3
RODAN + FIELDS

• **SAID TO BE** the largest skin care brand in the U.S., Rodan + Fields reached \$1.5 billion in sales in 2017, up from \$1.15 billion the year before. Shortly before TPG announced a minority investment in the brand—which was once part of the Estée Lauder stable—in May, chief executive officer Diane Dietz said the company will continue to post double-digit growth for the next several years. Though not a standout in digital or editorial metrics, Rodan + Fields is a clear favorite with the 200,000 and counting independent sales consultants. No wonder Euromonitor called it the fastest-growing brand in the beauty and personal-care category.

4
ESTÉE LAUDER

• **THE ULTIMATE** brand continues to be a global sales superstar, particularly in skin care. Constantly imbued with newness, the Advanced Night Repair franchise is soaring in high-growth markets like China and travel retail. The U.S. is no slouch either: Lauder is the number-two brand in skin care, and the number-three brand overall, according to NPD. For a mainstream brand, Lauder has stayed on the cutting edge of contemporary by signing the biggest names in the business, from Kendall Jenner (an early discovery) to Karlie Kloss and Anok Yai. All of the activity has garnered significant awards from some of the most critical eyes in the business, including *Allure*, *CEW*, *InStyle*, *Marie Claire* and *WWD*.

5
KIEHL'S

• **SKIN CARE IS DRIVING** L'Oréal's sales, and, with sales now reaching the 1 billion euro mark, Kiehl's is one of the brands leading the way. With its roots in a New York apothecary, the brand has successfully tapped into the Millennial focus on healthy skin and natural products. Ranked number seven in dollar sales year-to-date through May 2018, according to NPD, Kiehl's is the fastest-growing brand in the category, spurred by a social media presence that puts the brand in Tribes's top five performers by EMV for skin care.

6
LA MER

• **THE MOTHER OF** THE luxe skin-care category, La Mer has shown that it can cross generations and classifications very effectively. The brand has been posting double-digit growth across almost all regions (sales have exceeded the billion dollar market), according to parent company Estée Lauder Cos. Inc., with particular strength in China and travel retail. Newer launches like Genesience and Moisturizing Matte Lotion are helping attract the attention of Millennials and Boomers alike. In the U.S., the brand is ranked fifth in prestige skin care, according to NPD, and is also a top three fastest-growing brand.

7
OLAY

• **P&G HAS PROVED** the naysayers wrong and turned around an underperformer. Olay is once again a contributor of positive growth to the company's beauty portfolio. The launch of Olay Eyes has helped revive the brand's fortunes—its sales in the anti-aging category are up 30 percent for eyes and 3 percent overall—versus a 1 percent category decline, according to IRI, in the U.S. and its China business is strong. Olay also drove positive growth in the moisturizer category, up 16 percent versus 6 percent for Neutrogena (which still has a

significant advantage in terms of dollar sales) as innovations—notably Olay Whips moisturizers—have been a bona fide hit, and helped cement as the brand's comeback.

8
PHILOSOPHY

• **WHAT A DIFFERENCE** A year makes. Philosophy continues to combine empowering brand messages with efficacious skin care to great effect: The Coty-owned brand was the fourth largest skin-care player in the U.S. prestige market, according to NPD, with a top three spot in Amazing Grace and the number-one skin-care dollar of the year in terms of dollar sales with Purity Made Simple Pure Extractor Exfoliating Clay Mask. The product was a critical success as well, winning awards from *Allure*, *CEW* and *Refinery29*. The brand is also innovating off-line, opening WellBeing Workshops, for example, and entering China for the first time via Tmall.

9
SHISEIDO

• **SHISEIDO RANKS 12TH** in the BrandZ Global Top 100 ranking—but when it comes to percent change in value in 2018 versus 2017, it is number one, with a 42 percent gain. Part of that gain is attributable to the Japanese giant's strength in China, where it has focused on developing its digital strength and prestige image. But the brand is also performing well in the U.S., capitalizing on the J-wave and hero franchises like Ultimune Power Infusing Concentrate to solidify its position as the fourth largest brand by sales in the U.S. market, according to NPD.

10
DRUNK ELEPHANT

• **EFFICACIOUS FORMULAS**, eye-catching packaging and a great name have proven to be an irresistible combination for Drunk Elephant, the young indie skin-care brand that's a home run with Millennials. Founded by Tiffany Masterson, the Houston-based has attracted blue chip investors including VMG Partners and Leandra Medine of the *Man Repeller* and top talent like CEO Tim Warner and chief marketing officer Lucia Perdomo-Ruehlmann. The approach is working: Drunk Elephant has won numerous *Allure* and *CEW* awards, and is a key part of Sephora's skin-care figures, where sales were up almost 6 percent to an estimated \$4.1 billion for 2017, according to the *WWD Beauty Inc* Top 100. The momentum seems to be continuing, with parent company L Brands reporting core store growth increased 8 percent for the first quarter of this year.

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FRAGRANCE

the company has more top sellers than any other brand. Digitally, Tribe data shows that Chanel has achieved both breadth and engagement in its social initiatives, with almost 2,000 influencers and an ambassador “potency” of close to \$12,000 per ambassador, while L2 lauds its aggressive search strategy to thwart discount sellers.

2
BATH & BODY WORKS

• **BATH & BODY WORKS** was the big winner at the 2018 Fragrance Foundation Awards—with three awards including the coveted Consumers Choice Hall of Fame honor for Cucumber Melon. That success is reflected in the retailer's figures, where sales were up almost 6 percent to an estimated \$4.1 billion for 2017, according to the *WWD Beauty Inc* Top 100. The momentum seems to be continuing, with parent company L Brands reporting core store growth increased 8 percent for the first quarter of this year.

3
TOM FORD

• **IN THE WORDS OF** the brand itself, the best way to describe Tom Ford's fragrance business is “f—king Fabulous.” That fragrance, which launched in November 2017, priced at \$310 for a 50-ml bottle, was said to exceed sales projections by 20. But it's no one hit wonder: Ford's olfactive portfolio resonates globally, and the brand reportedly grew 50 percent in 2017, driven in part by Private Blend fragrances. Tom Ford is a critical as well as commercial success, notching up Fragrance Foundation Awards every year for the past decade, including two in 2018 for the aforementioned fragrance and *Oud Minérale*. Fabulous indeed.

4
JO MALONE

• **ONE OF THE OG** indie fragrance brands, Jo Malone is proving to be just as popular with Millennials today. The brand has created momentum with its masterful marketing mix that combines olfactive storytelling, pop-ups, limited editions and glam ambassadors and

1
CHANEL

• **IN A RAPIDLY** changing fragrance category, Chanel's dominance is absolute. With the number one (Coco Mademoiselle), two (Chance) and eight (Chanel No. 5) scents in the women's category and the number one bestseller in men's (Bleu de Chanel),