

EXCERPT from the Digital IQ Index®: **Personal Care**
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DIGITAL IQ INDEX:

Personal Care

September 3, 2013

SCOTT GALLOWAY
NYU Stern

Brave Old World

Despite the rhetoric from Personal Care executives regarding a brave new world of digital, to date, online innovation has lagged behind other consumer sectors. Brands struggle to deconstruct the gestalt of broadcast media that defines CPG, and evidence suggests the industry continues to use digital to accessorize an analog outfit. Specifically:

- Just four percent of Beauty and Personal Care sales take place via e-commerce, bolstered by the Skincare (12.1 percent) and Fragrance (6.4 percent) categories.¹ Oral Care, Hair Care, Deodorants, Tissues, and Sanitary Protection register less than two percent of sales online.² Only six brands in the Index are experimenting with direct to consumer e-commerce, and another four integrate a cart to transfer products to online retail partners. Less than half of brands syndicate content to online channels Amazon.com and Walmart.com.
- A third of Personal Care sites suffer from broken links, 69 percent have not updated their home pages in more than a month, and 12 percent link to out-of-date promotions and contests, resulting in category bounce rates of 54 percent.³
- Digital media investments across the category lack a cohesive strategy. The majority of display ads do not have a clear call-to-action: less than 20 percent prompt the consumer to buy now, only 18 percent provide a coupon, and seven percent feature retailer co-branding. Three out of ten brands are still not purchasing branded search terms.
- While 71 percent of sites feature email sign-up, less than half send a welcome email, and only 16 percent followed up with an email in a four-week period.
- Though more than a third of searches for Personal Care brand terms are conducted from a mobile device,⁴ less than half of brands feature a mobile site, and no more than a third have Facebook content optimized for mobile.

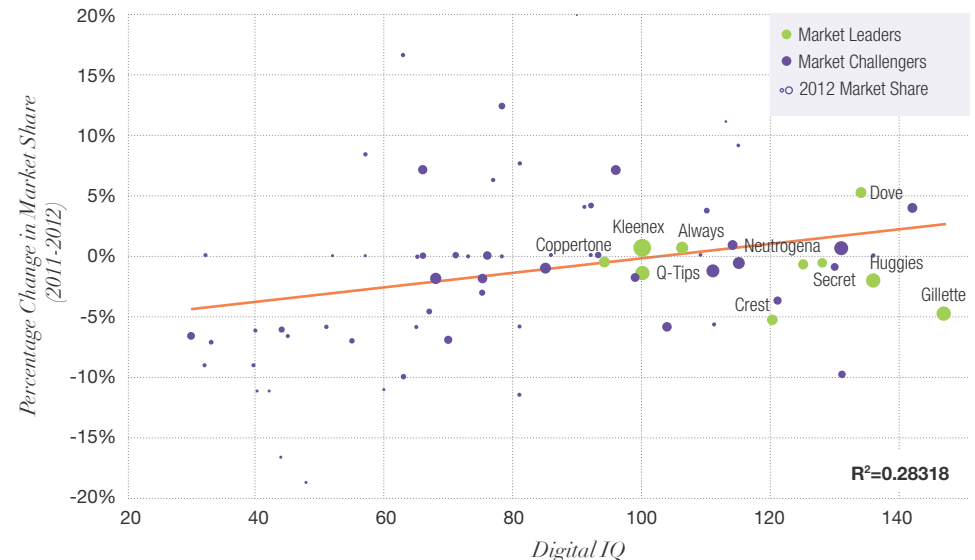
1. "Beauty and Personal Care in the US," Euromonitor International, 2013.
2. *Ibid.*
3. Alexa.com.
4. Google AdWords: Keyword Tool.

Point vs. Line

In 2010, Old Spice became the category's digital role model with its "The Man Your Man Could Smell Like" video campaign. Three years on, the brand still leads the category with nearly 260 million views on its YouTube channel. More recently, Dove's "Real Beauty Sketches" joined the viral video hall of fame with more than 163 million views to become the most-watched online video advertisement ever.⁵ While the success of these, and other digitally-led initiatives, are inspiring, most category programs to date are points of light—characterized by brilliant creative and nimble execution—and not part of a larger integrated effort supporting a business strategy.

Digital IQ vs. Percentage Change in Market Share

2011-2012, n=72



Note: Market Share represents market share in brand's largest category; data unavailable for Caress, Gold Bond, and Pull-Ups
Source: "Beauty and Personal Care in the US," Euromonitor International, 2013.

5. "Real Beauty Shines Through: Dove Wins Titanium Grand Prix, 163 Million Views on YouTube," June 2013.

Digital IQ = Market Share Growth

Data suggest online success translates to market. Old Spice has recorded market share gains in every Personal Care category it operates in since 2009.⁶ Dove has grown from 13.6 percent share in 2009 to 15.9 percent in 2012 in the Bath & Shower category (with similar gains in Deodorant), while Feeble soap brands Ivory, Coast, and Zest have listed substantial declines in share year over year (-7 percent, -33 percent, and -11 percent, respectively).⁷ Smaller, recent category entrants Burt's Bees, Method, and Tom's of Maine are punching above their weight class to land in the Gifted designation despite less than two percent market share in their largest category.⁸ Burt's Bees and Tom's of Maine are two of only six brands in the Personal Care study that are experimenting with direct-to-consumer e-commerce. Method blends strong online content and purchase-orientation across its site and social media channels. All three have registered market share gains since 2010.⁹

Digital IQ Index®: Personal Care

Our thesis is the success of Personal Care brands is inextricably linked to digital competence. This study attempts to quantify the digital performance of 75 U.S. Personal Care brands. Our aim is to provide a robust tool to diagnose digital strengths and weaknesses and help managers achieve greater return on incremental investment. Like the medium we are assessing, our methodology is dynamic, and we hope you reach out with comments that improve our approach and findings.

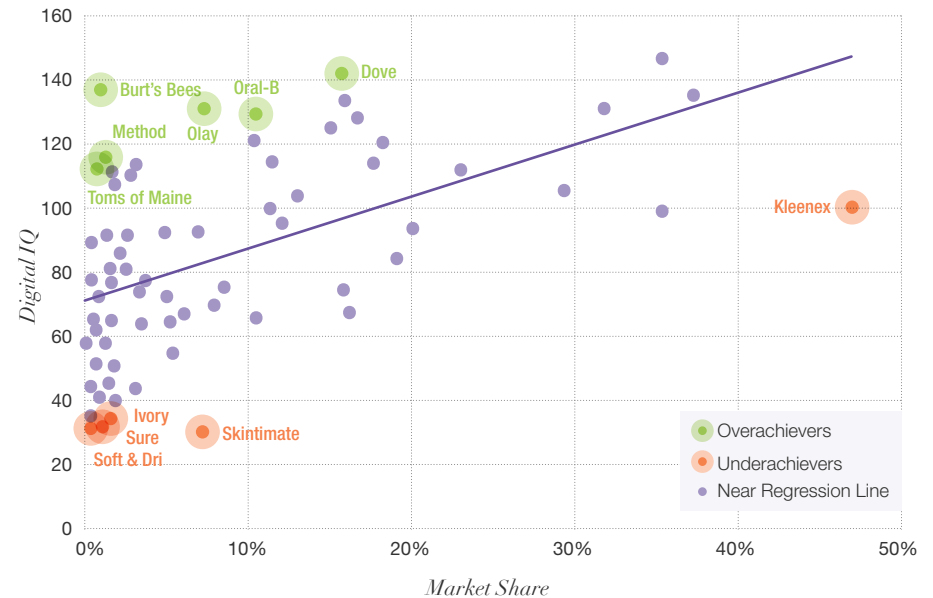
You can reach me at scott@stern.nyu.edu.



SCOTT GALLOWAY
Professor of Marketing, NYU Stern
Founder, L2

Market Share vs. Digital IQ

2012, n=72



Note: Represents market share in brand's largest category; data unavailable for Caress, Gold Bond, and Pull-Ups
Source: "Beauty and Personal Care in the US," Euromonitor International, 2013

6. "Beauty and Personal Care in the US," Euromonitor International, 2013.
7. *Ibid.*
8. *Ibid.*
9. *Ibid.*

About the Ranking

The Methodology

25%
Site

Functionality and Content (80%):
Technology
Navigation and Customer Service/Store Locator
Product Page
Checkout/Third-Party Retail Handoff

Brand Translation (20%):
Aesthetics, Messaging, and Visuals
(Provided by VSA Partners)

25%
Digital Marketing

Search, Display, and Email Marketing Efforts
Search:
Traffic, SEM, SEO, Web Authority

Retailer.com Investments:
Merchandising on Brand and Product Pages,
Search Visibility

Email:
Frequency, Content, Promotion

Blog & Other User-Generated Content:
Mentions, Sentiment

Advertising & Innovation:
Display, Retargeting, Cross-Platform Initiatives

25%
Mobile

Compatibility, Optimization, and Marketing on Smartphones and Tablets
Mobile Site:
Compatibility, Functionality, Navigation

Mobile Applications (iPhone, iPad, and Android):
Availability, Popularity, Functionality

Innovation:
Partnerships with Third-Party Apps, Shopper Marketing Initiatives, Recent Brand Initiatives

25%
Social Media

Brand Presence, Community Size, Content, and Engagement
Facebook:
Likes, Growth, Tabs and Applications, Responsiveness, Interaction Rate, Mobile Compatibility

Twitter:
Followers, Growth, Frequency, Online Voice

YouTube:
Views, Number of Uploads, Subscriber Growth, Viral Videos, YouTube Search

Emerging Social Media:
Google+, Instagram, Pinterest, Tumblr

Digital IQ Classes

Genius 140+

Digital competence is a point of competitive differentiation for these brands. Creatively engineered messaging reaches consumers on a variety of devices and many online environments.

Gifted 110–139

Brands are experimenting and innovating across site, mobile, and social platforms. Digital presence is consistent with brand image and larger marketing efforts.

Average 90–109

Digital presence is functional yet predictable. Efforts are often siloed across platforms.

Challenged 70–89



Limited or inconsistent adoption of mobile and social media platforms. Sites lack inspiration and utility.








Feeble <70








Investment does not match opportunity.

Digital IQ Ranking

Genius, Gifted

RANK	BRAND	DIGITAL IQ
1	 Procter and Gamble	Genius 147
2	 Unilever	142








RANK	BRAND	DIGITAL IQ
3	 The Clorox Company	Gifted 136
3	 Kimberly-Clark	136
5	 Colgate-Palmolive	135
6	 Procter & Gamble	131
6	 Procter & Gamble	131
8	 Procter & Gamble	130
9	 Procter & Gamble	128








RANK	BRAND	DIGITAL IQ
10	 Johnson & Johnson	125
11	 Procter & Gamble	121
12	 Procter & Gamble	120
13	 Kimberly-Clark	119
14	 Ecover	115
14	 Procter & Gamble	115
16	 Unilever	114








- GENIUS**
- Gillette
- Dove
- GIFTED**
- Burt's Bees
- Huggies
- Colgate
- Olay
- Pampers
- Oral-B
- Secret
- Neutrogena
- Old Spice
- Crest
- Pull-Ups
- Method
- Tampax
- AXE
- Tom's of Maine
- U by Kotex
- Nivea
- Puffs
- Aveeno
- AVERAGE**
- Eucerin
- Always
- Johnson's Baby
- Kleenex
- Q-tips
- Listerine
- Degree
- Coppertone
- Luvs
- Scoope
- Suave
- Veet
- Rembrandt
- CHALLENGED**
- Jergens
- Schick
- Aquafresh
- Arm & Hammer
- Edge
- GUM
- Sensodyne
- Vaseline
- Dial
- Caress
- Irish Spring
- Kotex
- St. Ives
- Gold Bond
- Softsoap
- Playtex
- FEEBLE**
- Banania Boat
- Speed Stick
- BIC
- Nair
- Curel
- Lever 2000
- Barbasol
- Right Guard
- Zest
- ACT
- Tone
- Stayfree
- Lubriderm
- Ban
- Spinbrush
- Brut
- Mitchum
- Dry Idea
- Arrid
- Reach
- Coast
- Ivory
- Soft & Dri
- Sure
- Skintimate

Digital IQ Ranking

Gifted, Average, Challenged

RANK	BRAND	DIGITAL IQ
17	 Colgate-Palmolive	113
17	 Kimberly-Clark	113
19	 Beiersdorf	111
19	 Procter & Gamble	111
21	 Johnson & Johnson	110
22	 Beiersdorf	Average 109
23	 Procter & Gamble	106








RANK	BRAND	DIGITAL IQ
24	 Johnson & Johnson	104
25	 Kimberly-Clark	100
25	 Unilever	100
27	 Johnson & Johnson	99
28	 Unilever	96
29	 Merck & Co.	94
30	 Procter & Gamble	93








RANK	BRAND	DIGITAL IQ
31	 Procter & Gamble	92
31	 Unilever	92
33	 Reckitt Benckiser	91
34	 Johnson & Johnson	90
35	 Kao Corporation	Challenged 86
36	 Energizer Holdings	85
37	 GlaxoSmithKline	81








- GENIUS
- Gillette
- Dove
- GIFTED
- Burt's Bees
- Huggies
- Colgate
- Olay
- Pampers
- Oral-B
- Secret
- Neutrogena
- Old Spice
- Crest
- Pull-Ups
- Method
- Tampax
- AXE
- Tom's of Maine
- U by Kotex
- Nivea
- Puffs
- Aveeno
- AVERAGE
- Eucerin
- Always
- Johnson's Baby
- Kleenex
- Q-tips
- Listerine
- Degree
- Coppertone
- Luvs
- Scope
- Suave
- Veet
- Rembrandt
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- Schick
- Aquafresh
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- Brut
- Mitchum
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- Arrid
- Reach
- Coast
- Ivory
- Soft & Dri
- Sure
- Skintimate

Digital IQ Ranking

Challenged, Feeble

RANK	BRAND	DIGITAL IQ
37	 Church & Dwight Co.	81
37	 Energizer Holdings	81
40	 Sunstar	78
40	 GlaxoSmithKline	78
42	 Unilever	77
43	 Henkel	76
44	 Unilever	75








RANK	BRAND	DIGITAL IQ
44	 Colgate-Palmolive	75
44	 Kimberly-Clark	75
47	 Unilever	73
48	 Chatterm	71
48	 Colgate-Palmolive	71
50	 Energizer Holdings	70
51	 Energizer Holdings	Feeble 68








RANK	BRAND	DIGITAL IQ
52	 Colgate-Palmolive	67
53	 Société Bic	66
53	 Church & Dwight Co.	66
55	 Kao Corporation	65
55	 Unilever	65
57	 Perio	63
57	 Henkel	63




- GENIUS
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- Dry Idea
- Arriid
- Reach
- Coast
- Ivory
- Soft & Dri
- Sure
- Skinintimate

Digital IQ Ranking

Feeble

RANK	BRAND	DIGITAL IQ
59	 High Ridge Brands Co.	60
60	 Chattem	57
60	 Henkel	57
62	 Johnson & Johnson	55
63	 Johnson & Johnson	52
64	 Kao Corporation	51
65	 Church & Dwight Co.	45

RANK	BRAND	DIGITAL IQ
66	 Helen of Troy	44
66	 Revlon	44
68	 Henkel	42
69	 Church & Dwight Co.	40
69	 Johnson & Johnson	40
71	 High Ridge Brands Co.	35
72	 Procter & Gamble	33

RANK	BRAND	DIGITAL IQ
73	 Newhall Laboratories	32
73	 Helen of Troy	32
75	 Energizer Holdings	30

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Key Findings

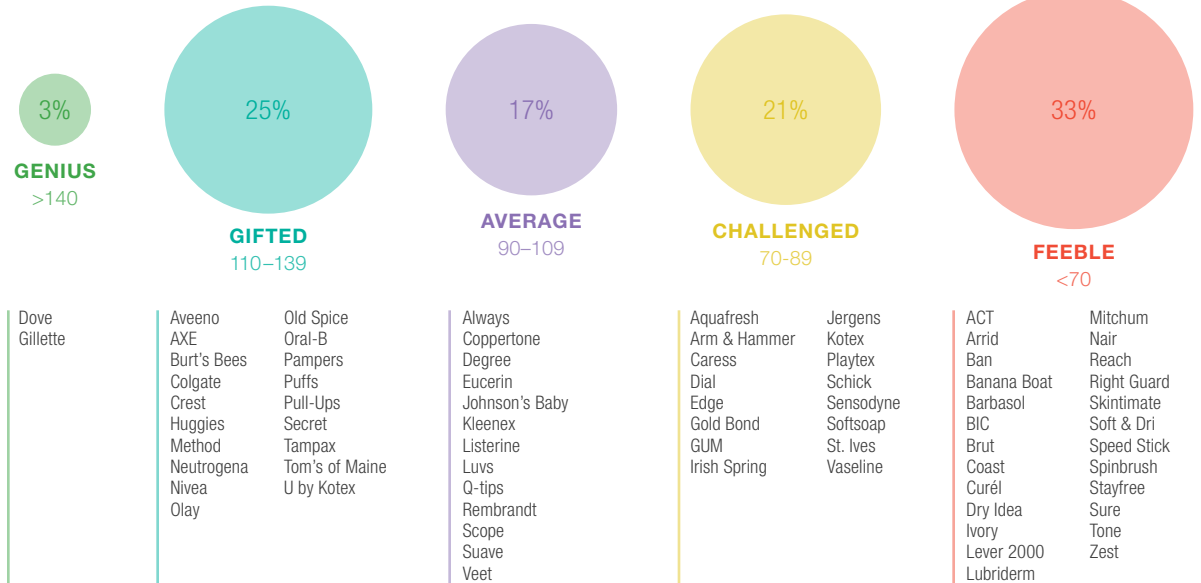
Digital IQ Distribution

More than half of Personal Care brands fall into the Challenged or Feeble categories, hamstrung by anemic site and e-commerce investments, limited direct-to-consumer data capture, and a fragmented approach to social media. Brands at the top of the ranking offer differentiated programming but still lack an integrated approach across digital touchpoints.

Gillette and Dove are the only brands to register Genius rankings. Both play in multiple Personal Care categories—the average Digital IQ of multcategory brands is 27 percent higher than for brands in a single category. Brands in the Diaper category enjoy the highest average Digital IQ by 25 points, due to early investments in e-commerce, sophisticated CRM programs, ad and search retargeting,¹⁰ and engaged social communities. On average, brands in the Deodorant & Antiperspirants register the lowest Digital IQs.

Digital IQ Distribution Percentage of Personal Care Brands per Digital Class

August 2013, n=75



Average Digital IQ by Product Category*

August 2013



*14 brands fall into multiple categories.

10. "Inside Kimberly-Clark's Digital Strategy," Giselle Abramovich, Digiday, March 27, 2012.

Key Findings *Site*



Site Maintenance

Shoppers trust content from brand sites more than any other online source, including news sites and articles found via search.¹¹ For CPG brands, the influence of a brand.com on in-store purchase behavior is evident: shoppers who visit a brand site spend 37 percent more in-store on the brand than non-visitors.¹²

However, traffic to brand.coms remains low: 57 percent of Personal Care sites log fewer than 100,000 visitors per month, and sites register an average bounce rate of 54 percent.¹³ Though some brands (e.g., Old Spice) receive more monthly visits to their social properties than their sites,¹⁴ the brand.com represents an opportunity to influence brand engagement where messaging can be controlled. To accomplish this, Personal Care sites require basic maintenance. More than a third suffer from broken content links. Buggy features, faulty e-commerce links, and links to expired campaigns are also problematic. More than two thirds did not update the site home page during a one-month data collection period, and 58 percent of sites that feature “In the News” or other time-sensitive sections haven’t posted content since 2012.

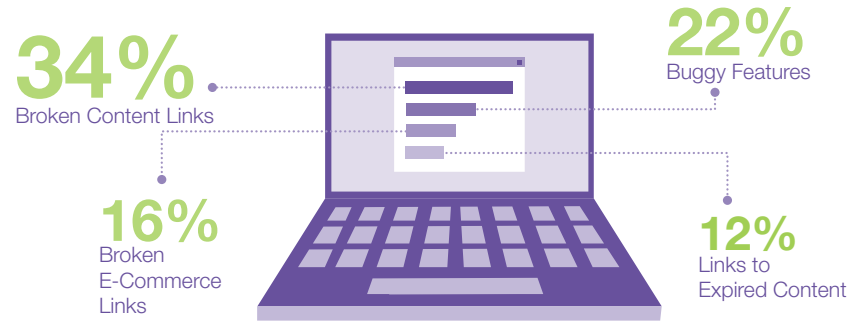
Compared to adjacent industries such as [Beauty](#) and [Hair Care & Color](#), Personal Care has made limited investments in common site features, including video (69 percent of sites), user reviews (44 percent), and ingredient information (32 percent).

11. “Behavior Shift: Getting Content in Front of Consumers,” nRelate, conducted by Harris Interactive, November 15, 2012.
12. “Are Your CPG Brands Maximizing the Return on Your Digital Investment?: Research Shows Direct Correlation between CPG Brand Website Usage and In-Store Purchase Behavior,” Accenture, dunhumbyUSA, comScore, January 2012.
13. Alexa.com
14. “Viral Marketing: Ain’t Nothing Old About Old Spice,” Ryan LaSala, Compete Pulse, September 27, 2012.

BurtsBees.com was one of just 31 percent of Personal Care sites to modify the merchandising on its home page over the course of a month.

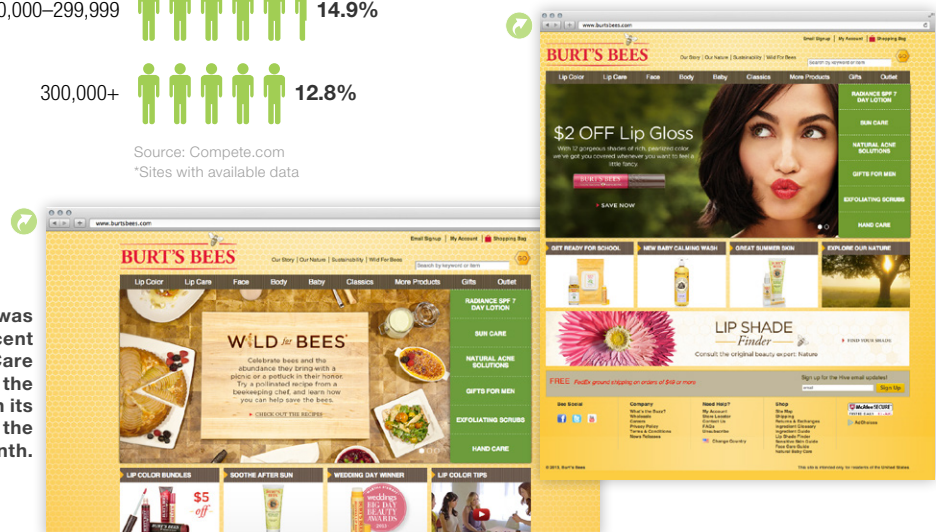
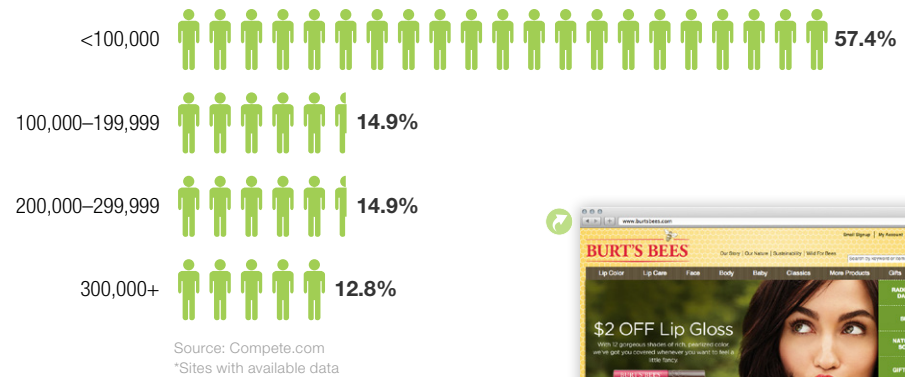
Personal Care Site Errors

July 2013, n=85 Sites



Average Monthly Visitors to Personal Care Sites

Percentage of Total, July 2013, n=47 Sites*



Key Findings *Social Media*



Social Media Presence

A third of Personal Care brands link from their sites to specific social media campaigns. Facebook and Twitter are the most popular platforms, registering 85 and 59 percent adoption, respectively. Ivory and Skintimate take a socially-led approach and automatically redirect from their brand.coms to their Facebook pages.

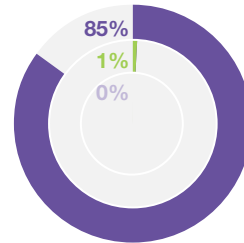
Seventy-two percent of brands have a YouTube channel; however, nearly a third did not upload any new videos over a three-month period. Many YouTube channels serve as archives for television commercials.

Investment in emerging social media platforms is nascent. Just over a quarter of brands maintain a Pinterest page, andw HUGGIES Baby Shower Planner is the only page with more than 5,000 followers. Less than 16 percent of brands are actively experimenting with Instagram, Vine, Google+, or Tumblr. Old Spice leads on Instagram, with roughly 17,000 followers—a small audience compared to adjacent Beauty leaders, which maintain Instagram communities well over 100,000.

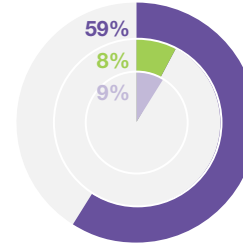
Social Media Platform Adoption

May–July 2013, n=75 Brands

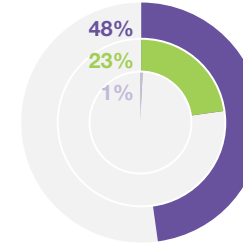
Active Inactive Placeholder



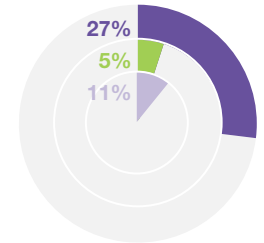
Facebook



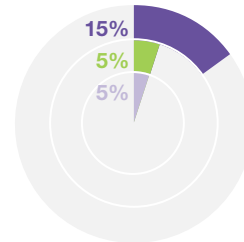
Twitter



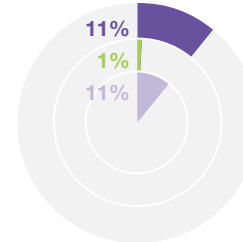
YouTube



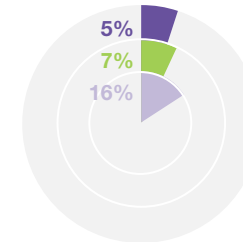
Pinterest



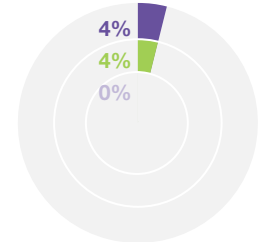
Instagram



Vine



Google+



Tumblr



*Placeholder: account with no initial activity; Inactive: no activity from May-July 2013.

Key Findings *Mobile*



Mobile

A third of smartphone users engage with their devices while shopping for Personal Care products.¹⁵ Furthermore, Walgreens shoppers who consult mobile and web channels spend six times as much in store as the average store-only customer.¹⁶

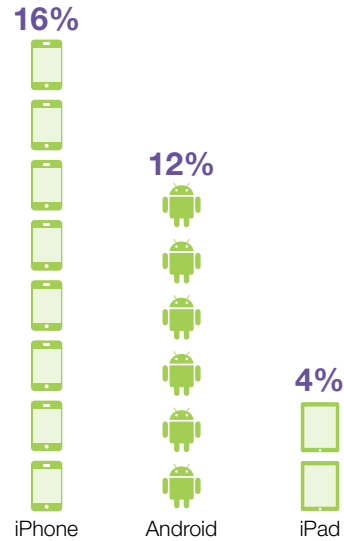
However, just 48 percent of Personal Care brand sites are at least partially mobile-optimized, with an additional fourteen percent employing mobile-friendly HTML5. Even among mobile-optimized sites, nearly a fifth are plagued by broken links or features, and less than half leverage touch-and-swipe functionality, one-click customer service options, finger-friendly inputs, or geolocation technology.

Adoption of stand-alone brand apps is even more limited. Less than 20 percent of the brands have an iPhone, iPad, or Android app. Among brand apps, only “Pampers Hello Baby Pregnancy Calendar” and “AXE Pogo Xtreme” have been rated by more than 900 users in the iTunes store.

The larger opportunity could be retailer and third-party apps and mobile sites that already have achieved scale. For example, more than 40 percent of Index Personal Care brands have partnered with apps such as Shopkick that reward shoppers for activity in-store.

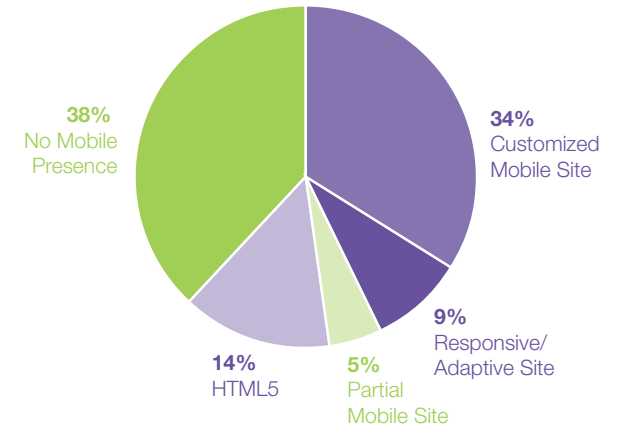
Mobile Application Adoption Rates

July 2013, n=75 Brands



Mobile Site Adoption

July 2013, n=87 Sites



Mobile Site Features

July 2013, n=42 Sites

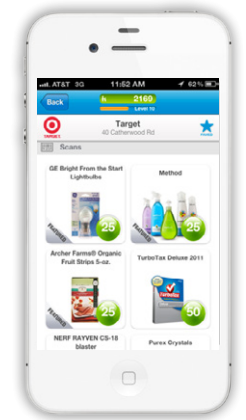


Schick print ads prompt users to text the brand to receive a free product sample.

15. “For Most Smartphone Owners, the Device is a Personal Shopping Assistant,” Bill Siwicki, Internet Retailer.

16. “The Walgreens Path to Omnichannel Success,” Fiona Swerdlow, blog.shop.org, February 6, 2013.

method



Method is featured in Shopkick's mobile app.

The Team



Scott Galloway

*Professor of Marketing, NYU Stern
Founder, L2*

Scott is a Clinical Professor at the NYU Stern School of Business where he teaches brand strategy and digital marketing, and is the founder of L2, a think tank for digital innovation. Scott is also the founder of Firebrand Partners, an operational activist firm that has invested more than \$1 billion in U.S. consumer and media companies. In 1997, he founded Red Envelope, an Internet-based branded consumer gift retailer. In 1992, Scott founded Prophet, a brand strategy consultancy that employs more than 300 professionals in the United States, Europe, and Asia. Scott was elected to the World Economic Forum's Global Leaders of Tomorrow.

Scott has served on the boards of directors of Eddie Bauer (Nasdaq: EBHI), The New York Times Company (NYSE: NYT), Gateway Computer, and UC Berkeley's Haas School of Business. He received a B.A. from UCLA and an M.B.A. from UC Berkeley.

Maureen Mullen

Director of Research & Advisory, L2

Maureen leads L2's research and advisory practice, where she helped develop the Digital IQ Index®. She has benchmarked the digital marketing, e-commerce, and social media efforts of more than 300 brands across pharma, auto, luxury, specialty retail, beauty, and the public sector. Maureen also has led digital strategy consulting engagements for a variety of Fortune 1000 clients. Before joining L2, Maureen was with Triage Consulting Group and led managed-care payment review and payment benchmarking projects for hospitals, including UCLA Medical Center, UCSF, and HCA. Maureen has a B.A. in Human Biology from Stanford University and an M.B.A. from NYU Stern.

Adam Berninger

Brand Translation, VSA Partners

Adam leads creative teams and grows brands such as Converse, M·A·C Cosmetics, Public Art Fund, and Vitamori with a vision that marries design, branding, digital marketing, and the practice of creating innovative experiences. In 2006, Adam co-founded Tender Creative, which became part of VSA Partners in the fall of 2012. He continues to guide client work and staff processes at VSA by building and facilitating smart systems, unique concepts, and brand-appropriate solutions.

Stasha Rosen

L2 Research Lead

While at L2, Stasha has led research for the 2013 Digital IQ Index: Specialty Retail, the 2013 Digital IQ Index: Hair Care & Color, and the 2012 Digital IQ Index: Beauty, along with EU Supplements for Beauty and Hair Care & Color. She has experience developing a variety of marketing initiatives, including those in the public programs department at the American Museum of Natural History. Stasha received a B.A. in Molecular, Cellular, and Developmental Biology from Yale University.

Katie Brehm

L2

Katie joins L2 from Macys.com where she was a Marketing Manger for women's shoes, handbags & fine jewelry. Katie has experience developing multichannel marketing campaigns, overseeing brand partnerships, delivering data-driven insights, and leading innovative ecommerce initiatives. She began her career at Deloitte Consulting, advising clients on organizational restructuring, process improvements and technology solutions. Katie holds a B.B.A. in Business Honors & Marketing from The University of Texas at Austin.

Chiara Lena

L2

Chiara holds a B.A. in Economics and Management for Arts, Culture and Communication and an M.S. in Business Administration, both from Università. Commerciale Luigi Bocconi (Milan, Italy). She focused her studies on the management of fashion and luxury companies, conducting research on how brands competing in those industries can preserve their image and identity in the online environment. Chiara has previously worked on the 2013 Digital IQ Index: Specialty Retail.

Janet Acosta

L2

Janet is an undergraduate student at New York University with a keen interest in the digital space. She has taken classes in new media research, digital literacy, and social media marketing where she has studied methodologies for solving business problems with the use of digital media. Before her time at L2, she was a Social Media Analytics Assistant at a digital advertising agency where she conducted social listening for Fortune 500 brands and helped design, evaluate, and optimize youth marketing campaigns for Diet Coke and Sony.

Josephine Sullivan

L2

Josephine Sullivan studies Logic & Computation at Carnegie Melon University. Her primary academic interests are computational theory and mathematics and she plans to pursue a PhD in these fields after graduation.

Aaron Bunge

L2

Aaron is an art director who specializes in data visualization, collateral, branding and identity, packaging, and web design. His approach is aesthetic and functional, characterized by clear, intelligent design appropriate to the project at hand. He began his career tailoring projects for the Chinese, Australian, and U.S. markets across multiple design disciplines and in multiple languages. Aaron has a B.F.A. in Graphic Design from Iowa State University.

Nary Han

L2

Nary is a designer specializing in data visualization that includes branding and identity. She has experience in areas ranging from motion graphics, interactive and environmental experiences, and graphic design. She has worked in many areas to design, conceive, and execute identities for several clients including Fidelity, Vivo Health & Wellness, and NASDAQ. She graduated with a B.F.A. from Parsons School of Design.

Radhika Patel

L2

Radhika Patel is a graphic designer who specializes in publication design as well as data visualization. She has experience in motion graphics, electronic media, experience design, and animation. Before joining the L2 team she worked at The Royce J. and Caroline B. Watts Museum in West Virginia. Radhika received her B.F.A. in Graphic Design from West Virginia University.

About L2



L2 is a think tank for digital innovation.

We are a membership organization that brings together thought leadership from academia and industry to drive digital marketing innovation.



RESEARCH

Digital IQ Index® is the global benchmark for digital performance of prestige brands. By analyzing more than 650 data points across four dimensions—Site & E-Commerce, Digital Marketing, Social Media, and Mobile—we quantitatively diagnose brands' digital strengths and weaknesses and rank peer-to-peer performance within the following verticals: Luxury, Beauty, Retail, Travel, Drinks, Auto, and CPG.

L2 Intelligence Reports complement L2's flagship Digital IQ Index® with a deeper dive on platforms or geographies of future growth. Critical areas of investigation include: Mobile, Video, Emerging Platforms, APAC and Brazil Russia India.

L2 Supplements provide an in-depth regional or platform-specific analysis of our Digital IQ Index® reports.



EVENTS

The Forum: Our annual flagship conference, held each November. The Forum is a one-day, TED-style event where the largest gathering of prestige executives in North America learn about case studies and best practices within the broader categories of Leadership, Genius, Organization and Behavior, among others.

300+ attendees

Clinics: L2's version of the one-day M.B.A, our quarterly clinics, held at NYU Stern and Hotel Palais Brongniart in Paris offer members an in-depth look at the issues, trends, strategies and technologies changing the face of prestige marketing.

120–180 attendees

Working Lunches: Held in cities across the world every month, our working lunches provide members with a midday opportunity to learn about our latest research releases and gain insight into digital opportunities.

40–80 attendees



CONSULTING

Advisory Services: L2 works with brands to garner greater return on investment in digital initiatives. Advisory work includes Digital Roadmaps, Social Media Strategy, and Organizational Strategy engagements.



MEMBERSHIP

For membership info and inquiries: membership@L2ThinkTank.com

Upcoming Events

CLINIC: DISRUPTION

September 9, 2013 · Geneva

September 12, 2013 · Paris

September 13, 2013 · London

LUNCH: RESEARCH BRIEFING

September 16, 2013 · Singapore

September 18, 2013 · Tokyo

CLINIC: DIGITAL INFLUENCE

September 24, 2013 · New York City

L2 FORUM

November 6 & 7, 2013 · New York City

Upcoming Research

INTELLIGENCE REPORT:

Digital Organization

DIGITAL IQ INDEX® REPORT:

Brazil | Prestige

Middle East | Prestige

Economy Hotels

Personal Care: Brazil, Russia, India

Table of Contents



Click logo to return here.

Click screen shots with this icon to view online!

Click to jump to:

5 Methodology

6 Digital IQ Rankings

- 6 Genius
- 8 Gifted
- 9 Average
- 10 Challenged
- 11 Feeble

14 Key Findings

- 14 Digital IQ Distribution
- 15 Enterprise Value



Site

- 16 E-Commerce Handoff
- 17 Site Maintenance



Digital Marketing

- 18 Digital Coupons
- 19 Retailer.coms
- 20 Display Advertising
- 21 Search
- 22 Email



Social Media

- 23 Social Media Presence
- 24 Facebook
- 25 Twitter
- 26 YouTube



Mobile


- 27 Mobile

35 Flash of Genius

- 28 Secret: Secret's "Mean Stinks" Campaign
- 29 Dove: "Real Beauty Sketches"
- 30 Pampers & Huggies: Loyalty Programs
- 31 Crest, Eucerin, Jergens, Olay, Reach, Softsoap, St. Ives: Site Interactive Features
- 32 Dove, Gillette, Nivea, Old Spice, Degree, Schick: Male-Targeted Video Campaigns
- 33 Aquafresh: Aquafresh "Time2Brush" Mobile Application
- 34 Huggies: Couponing
- 35 Edge Shave Gel: "Fans With Benefits"
- 36 Crest, Colgate, Procter & Gamble, Unilever: Hispanic Market

37 L2 Team

38 About L2



EXCERPT from the Digital IQ Index®: **Personal Care**
To access the full report, contact membership@L2ThinkTank.com

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for DIGITAL INNOVATION

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