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

L2

DIGITAL IQ *INDEX*:

Beauty

November 21, 2013

SCOTT GALLOWAY
NYU Stern

SURGE

In 2013, the Beauty sector will register 6 percent growth. E-commerce in Beauty is projected to grow a staggering 29.1 percent, besting growth of all (soft goods) sectors online.

Online influence across the industry is even greater as more than a third of Beauty consumers research online before purchasing.[1] The health of the industry has perpetuated an arms race across both traditional media investment and digital channels. Estée Lauder has made aggressive investments in its online division as it aims to outperform the sector's e-commerce growth. L'Oréal increased its media budget to $1.5 billion in the U.S last year and indicates that digital, as a percentage of spend, has grown double digits annually since 2010.[2] Heavyweight Procter & Gamble, whose beauty business has stalled, recently indicated that 25-35 percent of its media budget is allocated to digital and that it views investments online and a renewed focus on product innovation as key to turning the tide. Brand experimentation ranging from live video chat and robust loyalty and autoreplenish programs to sophisticated personalization tactics and digital-first integrated media campaigns have headlined the sector.

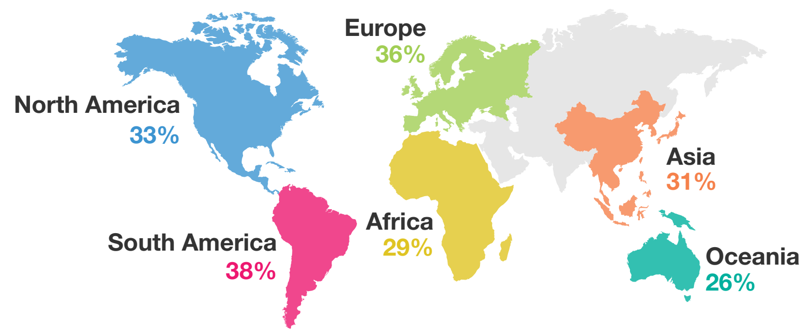
New Channels

Robust e-commerce growth, high margins and low ship-to-weight ratios are a powerful trifecta, and 2013 has seen a wave of e-commerce investment across Beauty. In October 2013 Amazon launched its much-anticipated Luxury Beauty store, originally slated for April. Burberry, NARS and L'OCCITANE headline an offering that, at present, lacks participation from any of the major conglomerates. However, with Amazon media investment beginning to ramp up and gray market inventory selectively being cleaned up, it may just be a matter of time. Sephora is not sitting still, exiting Amazon in February and launching its Sephora Flash program in August, mimicking Amazon Prime by offering customers free two-day delivery for a $10 annual fee. Traditional department store and big box retailers have also increased Beauty-specific online investments, improving site merchandising and co-op marketing opportunities for brands as they try to get their share.

1. "Consumer Barometer," Google, IAB Europe, TNS Infratest.
2. "L'Oréal Puts U.S. Digital Media Up for Review," Jack Neff, AdAge, August 20, 2013.

Percent of Beauty Purchasers Who Researched Online Before Purchasing Offline

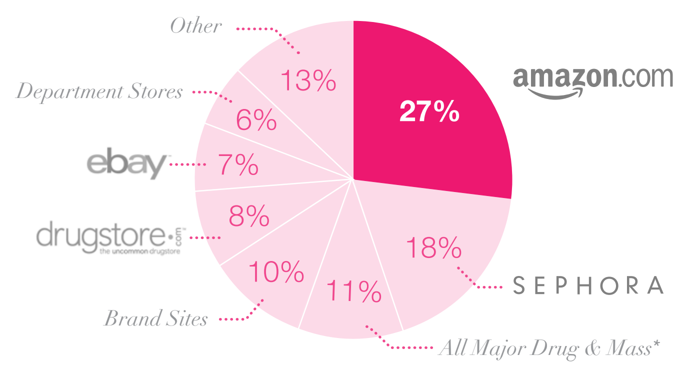
January–May 2012



Source: Consumer Barometer," Google, IAB Europe, TNS Infratest

Favorite Online Channels for North American Personal Care and Beauty Purchases

March 2012, Percent of Respondents



* Includes Walgreens, CVS, Wal-Mart, Target, and Others
Source: "Beauty and the Beast," A.T. Kearney, June 5, 2012

All In

It is evident that Beauty brands are doubling down on digital:

- Three-quarters of brands offer samples with online purchase compared to 58 percent in 2012
- 72 percent of Beauty sites are mobile optimized, up from 50 percent the previous year, and 85 percent of mobile sites facilitate purchase
- 79 percent of Beauty brands are now present on Instagram, up from just 29 percent in 2012
- Average email frequency is up 30 percent year on year across the category

Genius brands distinguish themselves with a robust e-commerce experience, seamless multichannel, campaigns and always-on digital content. Fragrance brands lag due to constraints of licensee relationships and a product launch focus—60 percent are Challenged or Feeble.

Financial Performance

Significantly outperforming the S&P 500, the Beauty sector catapulted out of the recession. Digitally savvy Beauty organizations are reaping more than their fair share of rewards. The Estée Lauder Companies, which leads all organizations with an average Digital IQ of 119 across its brands, has registered 39 percent revenue growth since 2009, topping 10 billion for the first time in FY 2012. Even more staggering, EBITDA growth across the company is up 330 percent, sending the stock soaring. L'Oréal, which nabs the top three spots in the Index, registered North American sales growth of 6.7 percent in the first half of 2013, stealing share in nearly every category it plays. Beauty retailer Sephora, which nabbed the top spot in our 2013 Digital IQ Index®: Specialty Retail, has been a significant catalyst of revenue and profitability growth at LVMH.

The Digital IQ Index®

Our thesis is that digital competence is linked to shareholder value. This study attempts to quantify the digital competence of 85 Beauty brands across three categories: Skincare, Color Cosmetics, and Fragrance. Our aim is to provide a tool for identifying strengths and weaknesses, helping brands achieve greater return on incremental investment. In the 2013 Beauty Index we initiated additional analysis, assessing a brands' retailer.com presence and their direct-to-consumer e-commerce fulfillment experience. Please reach out with comments that improve our methodology and findings.

SCOTT GALLOWAY
Professor of Marketing, NYU Stern
Founder, L2
scott@stern.nyu.edu

Personal Care Brands

Ranking Based On Brand's Share Of Category Ad Spending

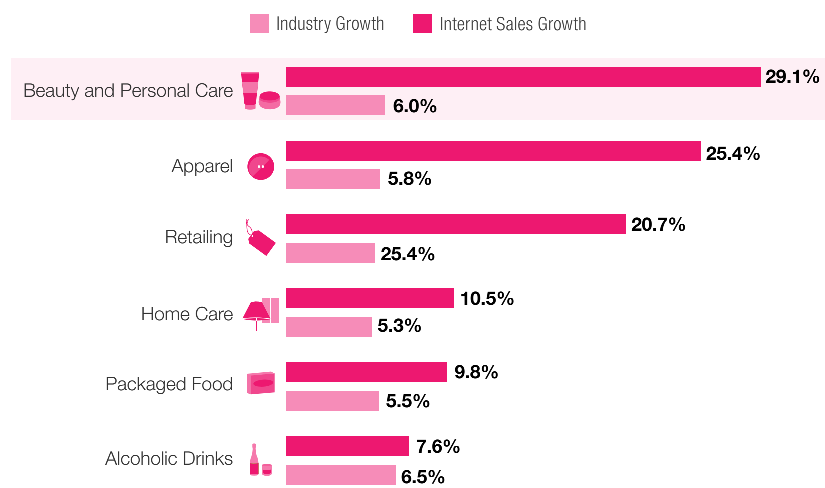
2013

Rank	**Brand** & Parent Company	Share of Ad Spending 2011	Share of Ad Spending 2012	Measured Media ($mm) 2011	Measured Media ($mm) 2012
1	**L'Oréal Paris** L'Oréal	7.6%	7.6%	$497	$525
2	**Maybelline New York** L'Oréal	4.6%	4.7%	$302	$325
3	**Garnier** L'Oréal	4.0%	3.8%	$264	$266
4	**CoverGirl** P&G	4.7%	3.8%	$307	$261
5	**Olay** P&G	4.8%	3.6%	$315	$252
7	**Crest** P&G	3.5%	2.8%	$232	$192
9	**Clinique** Estée Lauder Companies	1.6%	2.0%	$107	$135
10	**Estée Lauder** Estée Lauder Companies	1.4%	1.9%	$92	$133
		32.2%	**30.2%**	**$2,116**	**$2,089**
Total personal care ad spending		**100%**	**100%**	**$6,582**	**$6,930**

Source: AdAge, July 2013

Industry Growth vs. E-Commerce Growth

2013



About the Ranking

The Methodology

40% *Site*

Functionality and Content

Technology
Navigation & Product/Site Search
Customer Service & Store Locator
Product Page
Checkout
Fulfillment
Retail Partner Site Investments

30% *Digital Marketing*

Search, Display, and Email Marketing Efforts

Search:
Traffic, SEM, SEO, Web Authority, Long Tail Search

Email:
Frequency, Content, Promotion, Trigger Emails/ Segmentation

Blog & Other User-Generated Content:
Mentions, Sentiment

Advertising & Innovation:
Display, Retargeting, Cross-Platform Initiatives, Amazon, Vine, Tumblr

15% *Mobile*

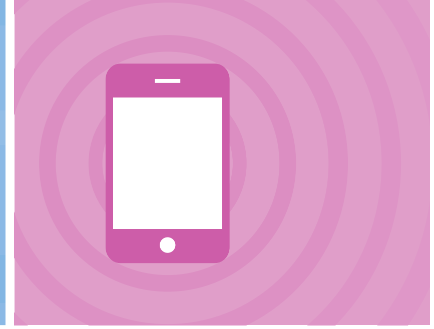
Compatibility, Optimization, and Marketing on Smartphones and Tablets

Mobile Site:
Compatibility, Functionality, Navigation

Tablet Site:
Cart Continuity / Saved Items, Express Checkout, Menu Optimization

Innovation:
Geo-local, iOS and Android Applications, In Store mobile, SMS

Mobile Search :
SEO + SEM, Contextually Relevant Mobile Advertising



15% *Social Media*

Brand Presence, Community Size, Content, and Engagement

Facebook:
Likes, Growth, Tabs & Applications, Responsiveness, Interaction Rate

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

Twitter:
Followers, Growth, Tweet Frequency, Online Voice

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

Digital IQ Classes

Genius 140+
Digital competence is a point of competitive differentiation for these brands. Creatively engineered messaging reaches travelers on a variety of devices and in 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.

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November 20, 2013

Digital IQ Ranking

● Fragrance ● Skincare ● Color Cosmetics ● Multi-category

RANK	BRAND	Category	Parent company	DIGITAL IQ
				Genius
1	LANCÔME PARIS	Multi-category	L'Oréal Group	149
2	Kiehl's SINCE 1851	Skincare	L'Oréal Group	144
3	L'ORÉAL PARIS	Multi-category	L'Oréal Group	143
4	benefit SAN FRANCISCO	Color Cosmetics	LVMH Möet Hennessy Louis Vuitton	141
4	BOBBI BROWN	Color Cosmetics	Estée Lauder Companies	141
4	ESTĒE LAUDER	Multi-category	Estée Lauder Companies	141
				Gifted
7	CLINIQUE	Multi-category	Estée Lauder Companies	137
8	AVEDA	Multi-category	Estée Lauder Companies	134
9	BARE ESCENTUALS	Multi-category	Shiseido Co.	131
9	MAC	Color Cosmetics	Estée Lauder Companies	131
11	CLARINS	Multi-category	Clarins	130
12	smashbox COSMETICS	Color Cosmetics	Estée Lauder Companies	128
13	VICTORIA'S SECRET	Multi-category	Limited Brands	127
14	em michelle phan	Color Cosmetics	L'Oréal Group	126
15	Elizabeth Arden	Multi-category	Elizabeth Arden, Inc.	124
15	L'OCCITANE EN PROVENCE	Multi-category	L'OCCITANE Group	124
15	MAYBELLINE NEW YORK	Color Cosmetics	L'Oréal Group	124
18	URBAN DECAY beauty with an edge	Color Cosmetics	L'Oréal Group	123
19	COVERGIRL	Color Cosmetics	Procter & Gamble	122
19	proactiv	Skincare	Guthy-Renker	122

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Digital IQ Ranking

Fragrance · Skincare · Color Cosmetics · Multi-category

RANK	BRAND	PARENT COMPANY	CATEGORY	DIGITAL IQ
				Gifted
21	Olay	Procter & Gamble	Skincare	120
22	Burt's Bees	The Clorox Company	Skincare	119
23	Avon	Avon Products	Multi-category	117
23	Giorgio Armani beauty	L'Oréal Group	Fragrance	117
23	Mary Kay	Mary Kay, Inc.	Multi-category	117
26	Origins	Estée Lauder Companies	Skincare	115
26	tarte	Tarte	Color Cosmetics	115
28	Chanel	Chanel	Multi-category	114
29	Murad	Murad	Skincare	112
				Average
30	clarisonic	L'Oréal Group	Skincare	109
30	Jo Malone London	Estée Lauder Companies	Fragrance	109
30	Neutrogena	Johnson & Johnson	Skincare	109
33	Perricone MD	N.V. Perricone M.D.	Skincare	107
34	Yves Saint Laurent	L'Oréal Group	Multi-category	106
35	NARS	Shiseido Co.	Color Cosmetics	105
35	Ralph Lauren	L'Oréal Group	Fragrance	105
37	SkinCeuticals	L'Oréal Group	Skincare	103
38	La Mer	Estée Lauder Companies	Skincare	102
38	laura mercier	Gurwitch Products	Multi-category	102
38	Revlon	Revlon	Multi-category	102
41	essie	L'Oréal Group	Color Cosmetics	101

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Digital IQ Ranking

● Fragrance ● Skincare ● Color Cosmetics ● Multi-category

RANK	BRAND		DIGITAL IQ
			Average
41	MAKE UP FOR EVER PROFESSIONAL PARIS	LVMH Moët Hennessy Louis Vuitton	101
43	GUCCI	Procter & Gamble	100
43	Juicy Couture	Elizabeth Arden, Inc.	100
43	Sally Hansen	Coty	100
46	MICHAEL KORS	Estée Lauder Companies	99
47	GARNIER	L'Oréal Group	98
48	BURBERRY	Burberry Group	96

RANK	BRAND		DIGITAL IQ
48	Dior	LVMH Moët Hennessy Louis Vuitton	96
50	LA ROCHE-POSAY LABORATOIRE DERMATOLOGIQUE	L'Oréal Group	95
50	NIVEA	Beiersdorf	95
50	PHYSICIANS FORMULA	Markwins International Corp.	95
50	SHISEIDO	Shiseido Co.	95
50	simple	Unilever	95
55	VICHY LABORATOIRES	L'Oréal Group	94

RANK	BRAND		DIGITAL IQ
56	philosophy	Coty	91
56	Thierry Mugler	Clarins	91
			Challenged
58	Calvin Klein fragrances	Coty	89
59	CAUDALÍE	Caudalie	85
60	RIMMEL	Coty	83
61	ALMAY	Revlon	82
61	Clean & Clear	Johnson & Johnson	82

Lancôme
Kiehl's
L'Oréal Paris
Benefit Cosmetics
Bobbi Brown
Estée Lauder
Clinique
Aveda
Bare Escentuals
MAC Cosmetics
Clarins
Smashbox Cosmetics
Victoria's Secret
em michelle phan
Elizabeth Arden
L'OCCITANE en Provence
Maybelline New York
Urban Decay
CoverGirl
Proactiv Solution
Olay
Burt's Bees
Avon
Giorgio Armani Beauty
Mary Kay
Origins
Tarte
Chanel
Murad
Clarisonic
Jo Malone London
Neutrogena
Perricone MD
Yves Saint Laurent Beauté
NARS Cosmetics
Ralph Lauren
SkinCeuticals
La Mer
Laura Mercier
Revlon
Essie
MAKE UP FOR EVER
Gucci
Juicy Couture
Sally Hansen
Michael Kors
Garnier
Burberry
Dior
La Roche-Posay
Nivea
Physicians Formula
Shiseido
Simple
Vichy
Philosophy
Thierry Mugler
Calvin Klein Fragrances
Caudalie
Rimmel London
Almay
Clean & Clear
Fresh
Aveeno
Bioré
La Prairie
Trish McEvoy
Marc Jacobs Fragrances
SK-II
Cetaphil
Donna Karan
Pond's
HUGO BOSS Fragrances
Lacoste
Iman Cosmetics
Dolcé & Gabbana
N.Y.C. New York Color
OPI
Wet n Wild
Prada
Jean Paul Gaultier
Viktor & Rolf
James Bond
PUMA Fragrances
Vera Wang

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RANK	BRAND	PARENT	DIGITAL IQ
			Challenged
61	fresh	LVMH Moët Hennessy Louis Vuitton	82
64	Aveeno ACTIVE NATURALS	Johnson & Johnson	80
64	Bioré	Kao Corp.	80
66	la prairie SWITZERLAND	Beiersdorf	78
66	Trish McEvoy	Trish McEvoy Ltd.	78
68	MARC JACOBS	Coty	77
69	SK-II	Procter & Gamble	76
70	Cetaphil	Galderma	73
70	DONNA KARAN NEW YORK	Estée Lauder Companies	73
70	POND'S	Unilever	73
73	HUGO BOSS	Procter & Gamble	72
74	LACOSTE	Procter & Gamble	71
75	IMAN	Impala	70
			Feeble
76	DOLCE & GABBANA	Procter & Gamble	68
76	NYC NEW YORK COLOR	Coty	68
78	O·P·I	Coty	65
79	wet n wild	Markwins International Corp.	56
80	PRADA	Puig	55
81	Jean Paul GAULTIER	Shiseido Co.	50
81	VIKTOR®ROLF	L'Oréal Group	50
83	007	Procter & Gamble	48

Lancôme
Kiehl's
L'Oréal Paris
Benefit Cosmetics
Bobbi Brown
Estée Lauder
Clinique
Aveda
Bare Escentuals
MAC Cosmetics
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RANK	BRAND		DIGITAL IQ
			Feeble
84	PUMA FRAGRANCES Procter & Gamble	● (Fragrance)	46
85	VERA WANG Coty	● (Fragrance)	34

Lancôme
Kiehl's
L'Oréal Paris
Benefit Cosmetics
Bobbi Brown
Estée Lauder
Clinique
Aveda
Bare Escentuals
MAC Cosmetics
Clarins
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Jo Malone London
Neutrogena
Perricone MD
Yves Saint Laurent Beauté
NARS Cosmetics
Ralph Lauren
SkinCeuticals
La Mer
Laura Mercier
Revlon
Essie
MAKE UP FOR EVER
Gucci
Juicy Couture
Sally Hansen
Michael Kors
Garnier
Burberry
Dior
La Roche-Posay
Nivea
Physicians Formula
Shiseido
Simple
Vichy
Philosophy
Thierry Mugler
Calvin Klein Fragrances
Caudalie
Rimmel London
Almay
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N.Y.C. New York Color
OPI
Wet n Wild
Prada
Jean Paul Gaultier
Viktor & Rolf
James Bond
PUMA Fragrances
Vera Wang

Key Findings *Digital Marketing*

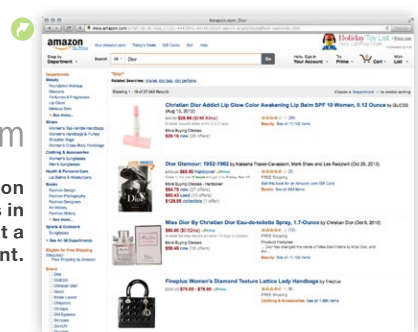
Third-Party Retailers

Seventy-four percent of online shoppers in Health & Beauty prefer third-party retail sites to manufacturer sites for online shopping,[1] and nearly a third of online buyers begin their search on Amazon, compared with just 13 percent on search engines such as Google.[2] Consumer brands are treating retailer.coms as media channels and are syndicating enhanced content across third-party retail sites. Seventy-six percent of mass brands in the Index feature multiple product images on Amazon.com and 79 percent supply ingredient and direction information. Video adoption is more limited, with just 10 percent including video on Amazon.com product pages and 17 percent on Drugstore.com.

Beyond the confines of its new Luxury Beauty storefront, Amazon.com remains a breeding ground for grey market activity. Unofficial products from the prestige brands in the Index are sold at an average discount of 30 percent. However, searches for prestige brands on Amazon.com produce not only gray market products but also sponsored links that drive to the brand site. Ninety-one percent of searches for prestige brands in the L'Oréal portfolio result in sponsored links, compared with just 18 percent of searches for Estée Lauder's prestige brands and 43 percent for Procter & Gamble's.

amazon.com

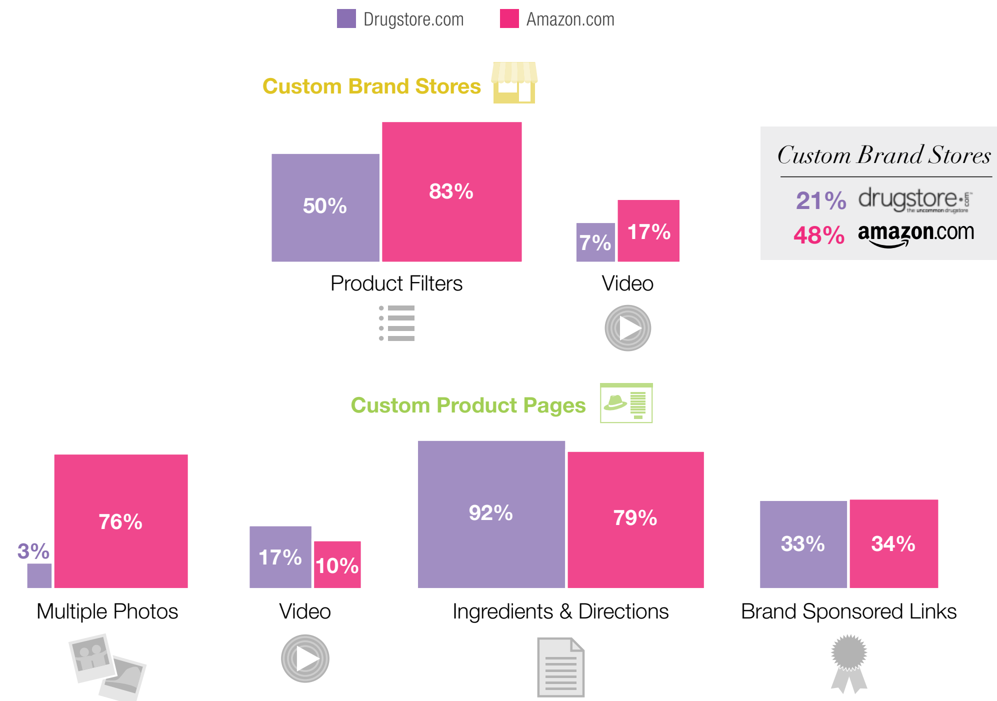
A search for "Dior" on Amazon.com results in hundreds of SKUs at a 10–50 percent discount.



1. "E-Commerce and Consumer Goods: A Strategy for Omnichannel Success," Matthew Egol, Arun Rajagopalan, Bart Sayer, Booz & Company, November 30, 2012.
2. "Amazon.com: Friend or Foe?," Brian Walker, Forrester Blogs, July 26, 2012.

Beauty: E-Tailer Merchandising

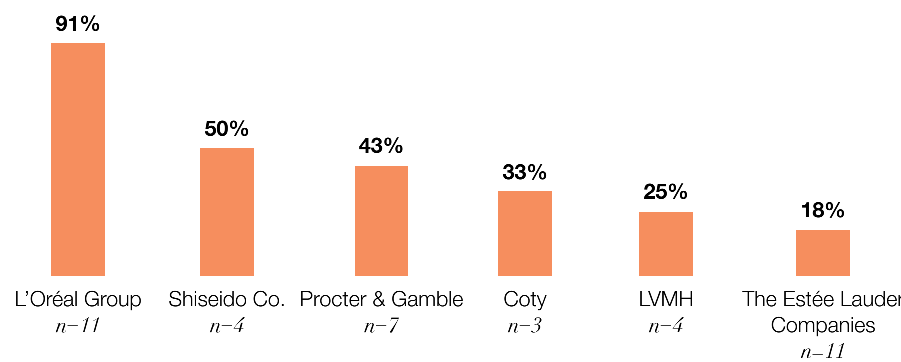
October 2013, n=29



amazon.com

Percentage of Prestige Beauty Brand Name Searches with Brand.com Sponsored Links

October 2013



Key Findings *Social Media*

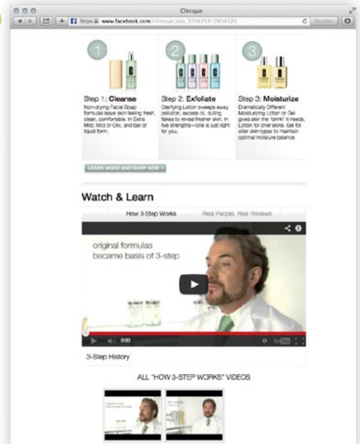
Facebook *continued*

At the time of the study, 41 percent of Beauty brands weree using Facebook's advertising products. Approximately 40 percent of Facebook ads linked to the brand's home page drove to specific site content or collection/product pages. Only 8 percent of brands directed the consumer to a destination within Facebook, a huge departure from how Beauty brands have approached Facebook advertising investments historically.

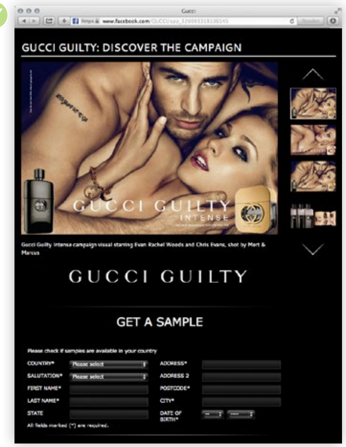
Facebook custom tabs offer Beauty brands a space to educate their fanbases, expand their mailing lists, and drive consumers to the site for purchase. Only 28 percent of Beauty brand Facebook pages enable email opt-in through custom tabs, and less than a quarters have custom tabs that feature interactive tools (22 percent), user reviews (26 percent), or how-to content (20 percent).

However, just 16 percent of brands were employing retargeted ads during the study period, and less than half of the retargeted ads (38 percent) led to a specific product. Within six months of launching, Facebook Exchange accounted for 47 percent of retargeted impressions on the web.[1]

CLINIQUE



Clinique's 3-step Facebook tab explains the process, features video testimonials, offers email sign-up, and links to e-commerce and a diagnostic tool on the brand's site.

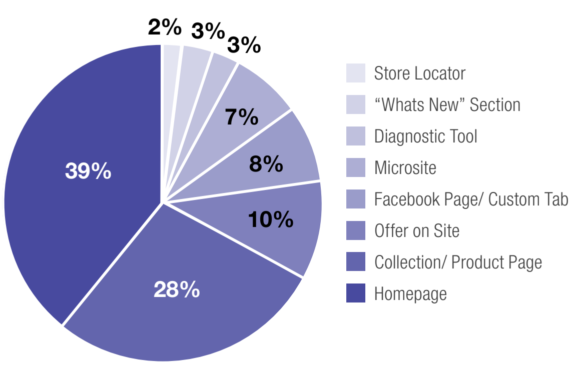


GUCCI parfums

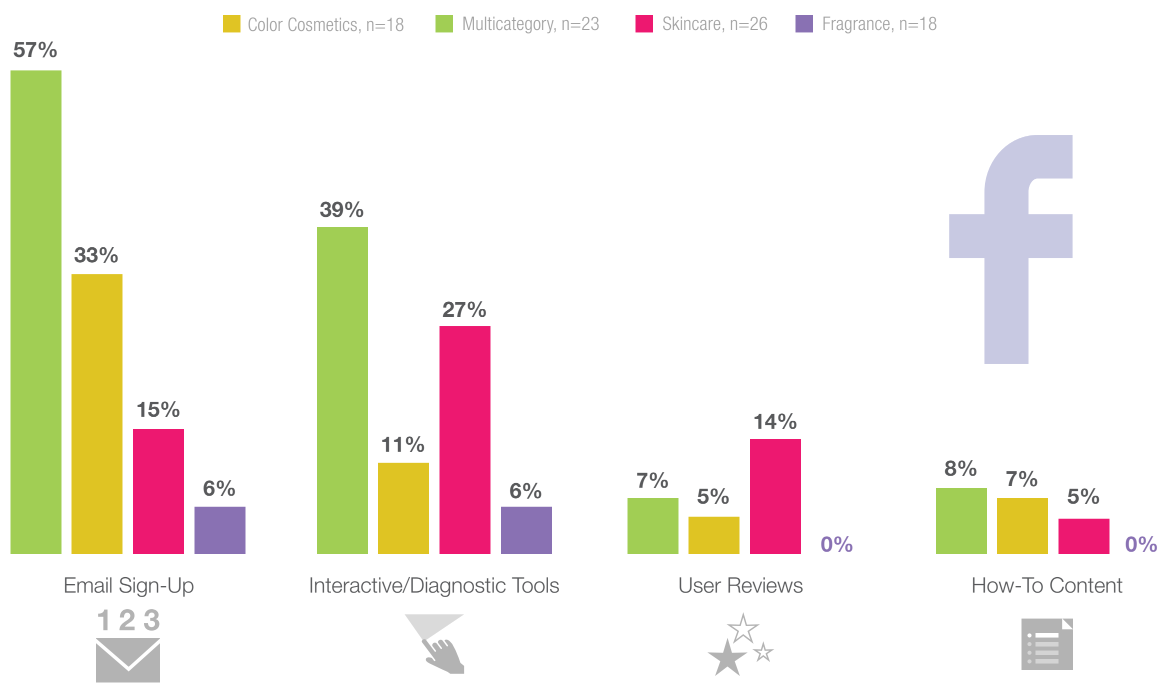
The Gucci Guilty custom tab allows fans to vote for their favorite fragrance, receive samples, and opt-in to email marketing.

Percentage of Beauty Facebook Ads Linking to the Following

September–October 2013, n=61 Ads



Percentage of Beauty Facebook Pages with Custom Tabs Features



1. AdRoll, February 2013.

Key Findings *Mobile*

Mobile Apps

Although mobile site adoption has ballooned year over year, mobile app development has stagnated with the exception of a 6 percent increase in iPad-compatible apps. Forty percent of beauty-exclusive iPhone apps have received fewer than 10 ratings on iTunes and 60 percent have a three-star or less rating.

O·P·I

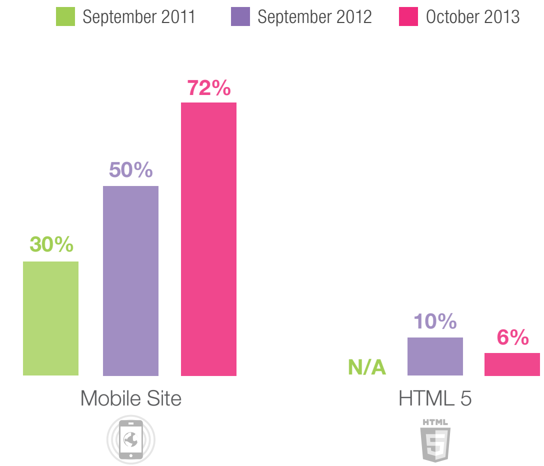
OPI's iphone app allows users to virtually try on nail polishes.

The Beauty section of the Victoria's Secret mobile app features fragrance video, links to mobile site for e-commerce, and has catalog scanning capability.

VICTORIA'S SECRET

Beauty Mobile Site Adoption

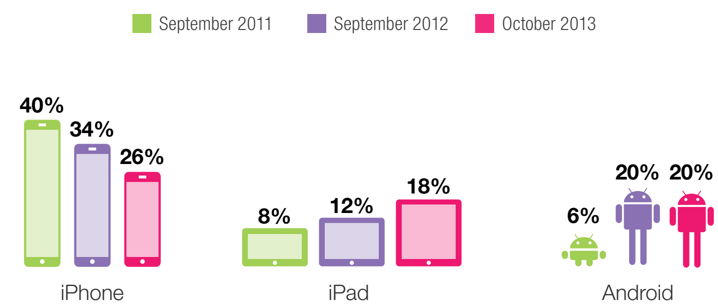
n=50*



* Note: Includes brands present in all studies

Beauty Mobile Application Adoption

n=50*



* Note: Includes brands present in all studies

Supplement *Celebrity Fragrance*

Celebrity Fragrances: Social Media

Although the majority of licensees maintain fragrance-dedicated social media accounts on Facebook, Twitter, and YouTube, increasingly brands are leveraging the celebrities to amplify messaging. Half of licensee sites are linking to the celebrities social pages rather than their own.

On average celebrity Facebook pages are almost 260 times larger than licensee-controlled, fragrance-dedicated pages. With their reach much greater, in the last month, seven of the 13 celebrities posted fragrance-related content to their Facebook page. Lady Gaga and Sarah Jessica Parker have not posted about their fragrances in the past six months. On Facebook, the majority of both licensees and celebrities continue to post at least 30 days after the fragrance launch, but average just 0.6 posts per month. Celebrities are utilizing Twitter less. Just four of the 13 celebrities tweeted about fragrance from their personal accounts in the past month, and five have not tweeted in the last six months.

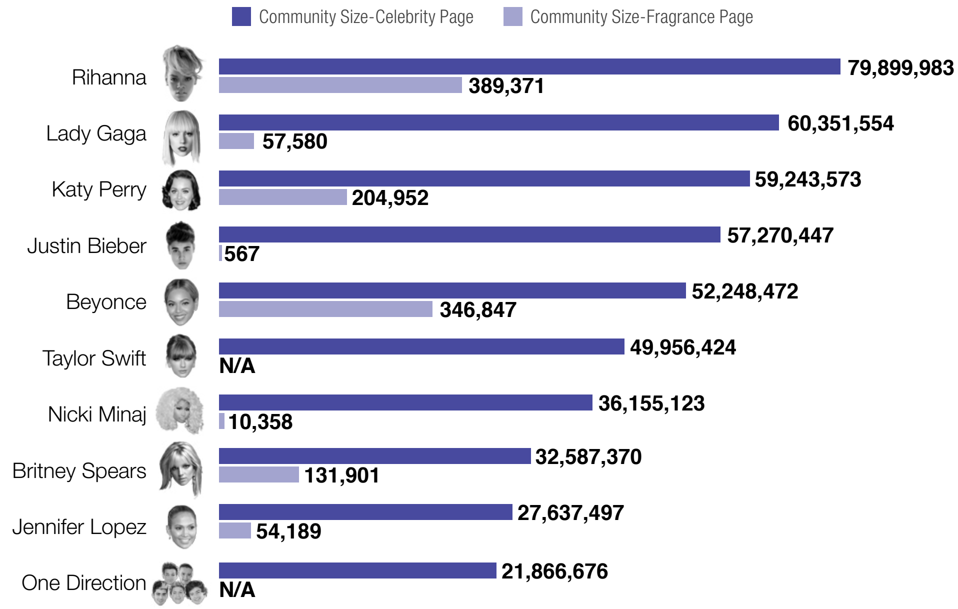
Perfumes by Rihanna Facebook page asks its fans to like the page and provide personal information to receive a Rogue fragrance sample.

Display and Facebook advertising supported Rogue's launch.

The @PerfumesbyRiri twitter account has amassed 72,000 followers in the wake of Rogue's September launch.

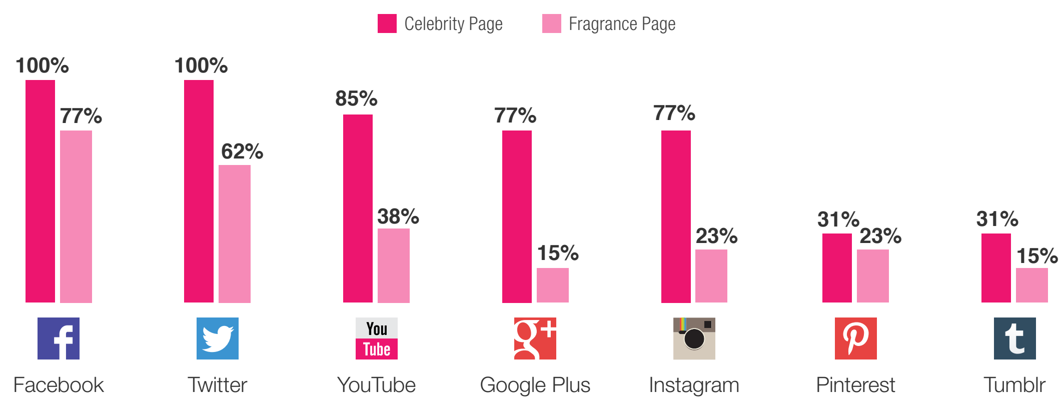
Facebook Community Sizes: Celebrity Pages vs. Fragrance Pages

November 2013



Social Media Presence

November 2013, n=13



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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®: The definitive benchmark for online competence, Digital IQ Index® reports score brands against peers on more than 600 quantitative and qualitative data points, diagnosing their digital strengths and weaknesses.

L2 Collective®: Series of benchmarking reports designed to help member brands better understand resources, human capital, budgets, and priorities supporting digital strategies.

EVENTS

Forums: Big-picture thinking and game-changing innovations meet education and entertainment. The largest gatherings of prestige executives in North America.
300+ attendees

Clinics: Executive education in a classroom setting with a balance of theory, tactics, and case studies.
120–180 attendees

Working Lunches: Members-only lunches led by digital thought leaders and academics. Topic immersion in a relaxed environment that encourages open discussion.
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

LUNCH: **FASHION**
November 22, 2013 • Milan

LUNCH: **FASHION & BEAUTY**
November 26, 2013 • Paris

LUNCH: **FASHION & BEAUTY**
November 27, 2013 • London

LUNCH: **YEAR IN REVIEW**
December 12, 2013 • New York City

CLINIC: **AMAZON**
January 23, 2013 • New York City

Upcoming Research

DIGITAL IQ INDEX® REPORT:
Fashion
Sportswear
Home Care
EU Beauty
China: Beauty
China: Fashion, Watches & Jewelry
Spirits

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

A THINK TANK *for* DIGITAL INNOVATION

51 East 12th Street, 2nd Floor
New York, NY 10003

L2ThinkTank.com
info@L2ThinkTank.com