



WaveMetrix Advocacy Tracker

Understanding consumer recommendations around Neutrogena Naturals

March 2012

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1. Executive summary

In May 2011 Neutrogena Naturals advocacy drops back towards March levels



Drop in advocacy due to many fewer recommendations on Facebook

- The end of the April Facebook social media campaign leads to a drop in advocacy levels
- May advocacy is driven mainly by review sites



Results continues to be a key strength of Neutrogena Naturals

- Results has overtaken Quality as the top advocacy driver in May
- Results drives more advocacy and less detraction than for competitors



The Purifying Facial Cleanser drives around half of Neutrogena Naturals advocacy

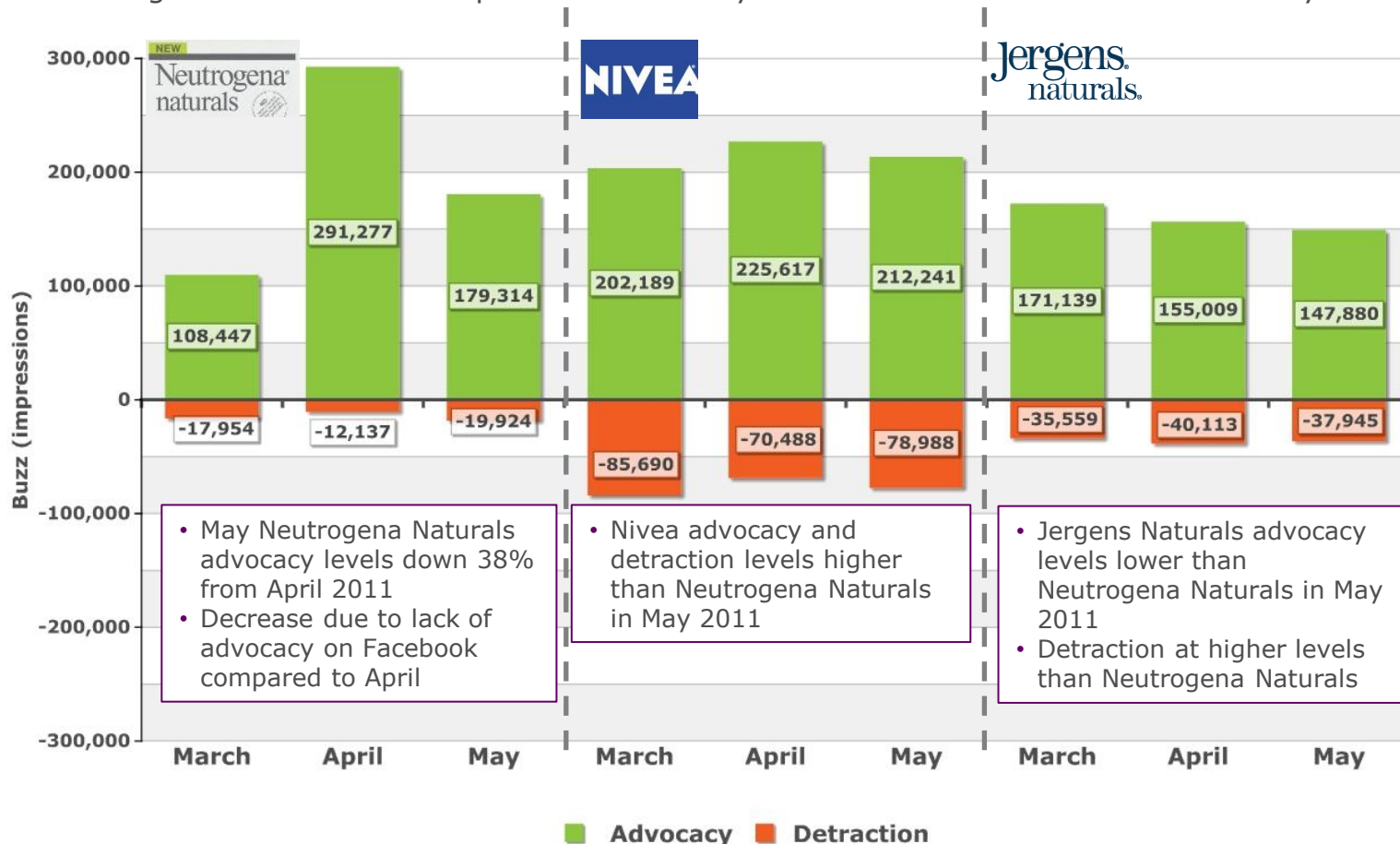
- Almost all advocacy in May 2011 is product specific with the Purifying Facial Cleanser being the biggest advocacy driver
- In April, advocacy focused on the Neutrogena Naturals range as a whole rather than on specific products



2. Advocacy overview

INDUSTRY OVERVIEW: May advocacy levels for Neutrogena Naturals are down from April

Neutrogena Naturals vs Competitors: Advocacy and detraction levels in March to May 2011



- May Neutrogena Naturals advocacy levels down 38% from April 2011
- Decrease due to lack of advocacy on Facebook compared to April

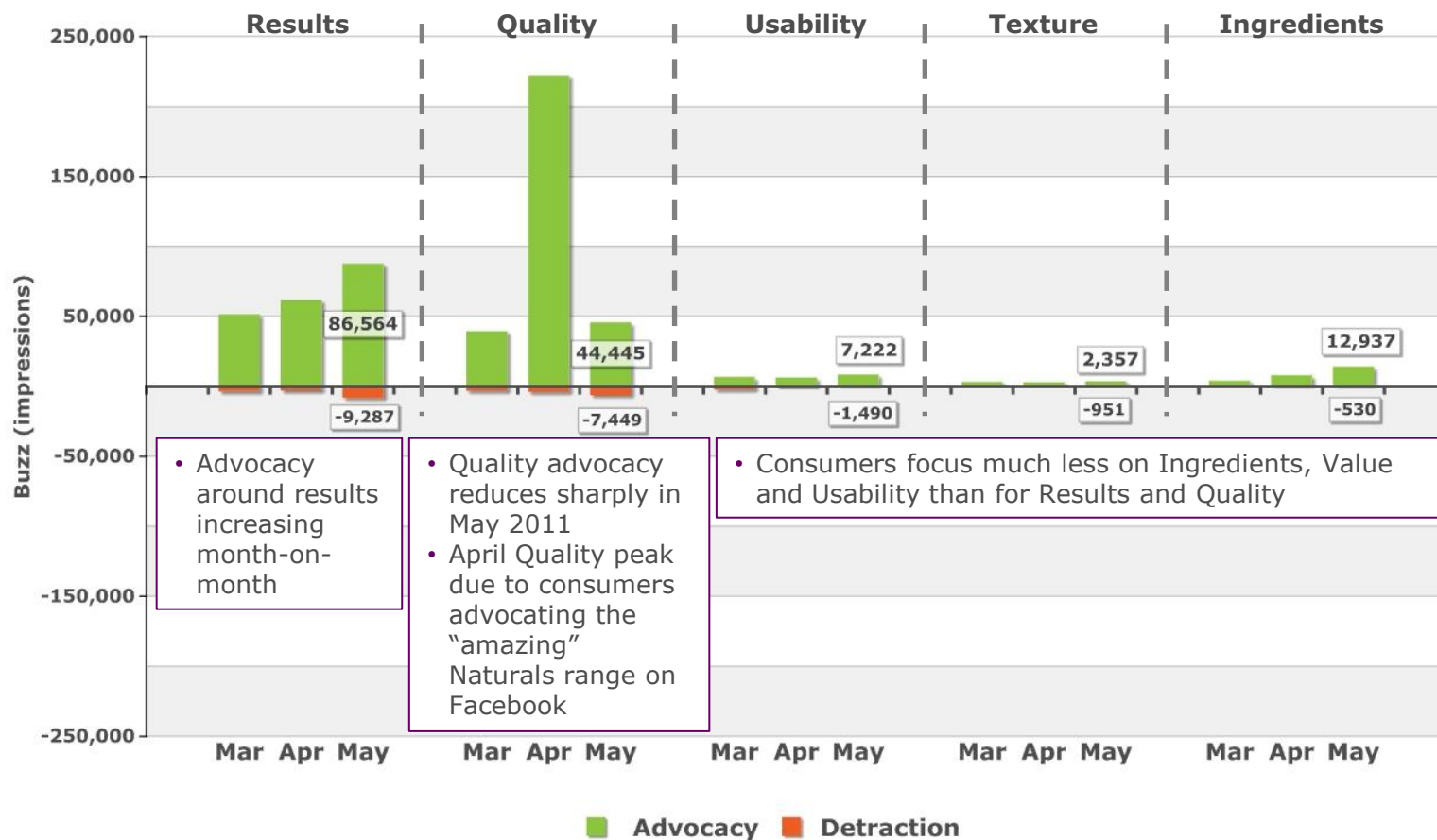
- Nivea advocacy and detraction levels higher than Neutrogena Naturals in May 2011

- Jergens Naturals advocacy levels lower than Neutrogena Naturals in May 2011
- Detraction at higher levels than Neutrogena Naturals

Source: WaveMetrix

ADVOCACY DRIVERS: Results drives Neutrogena Naturals advocacy in May

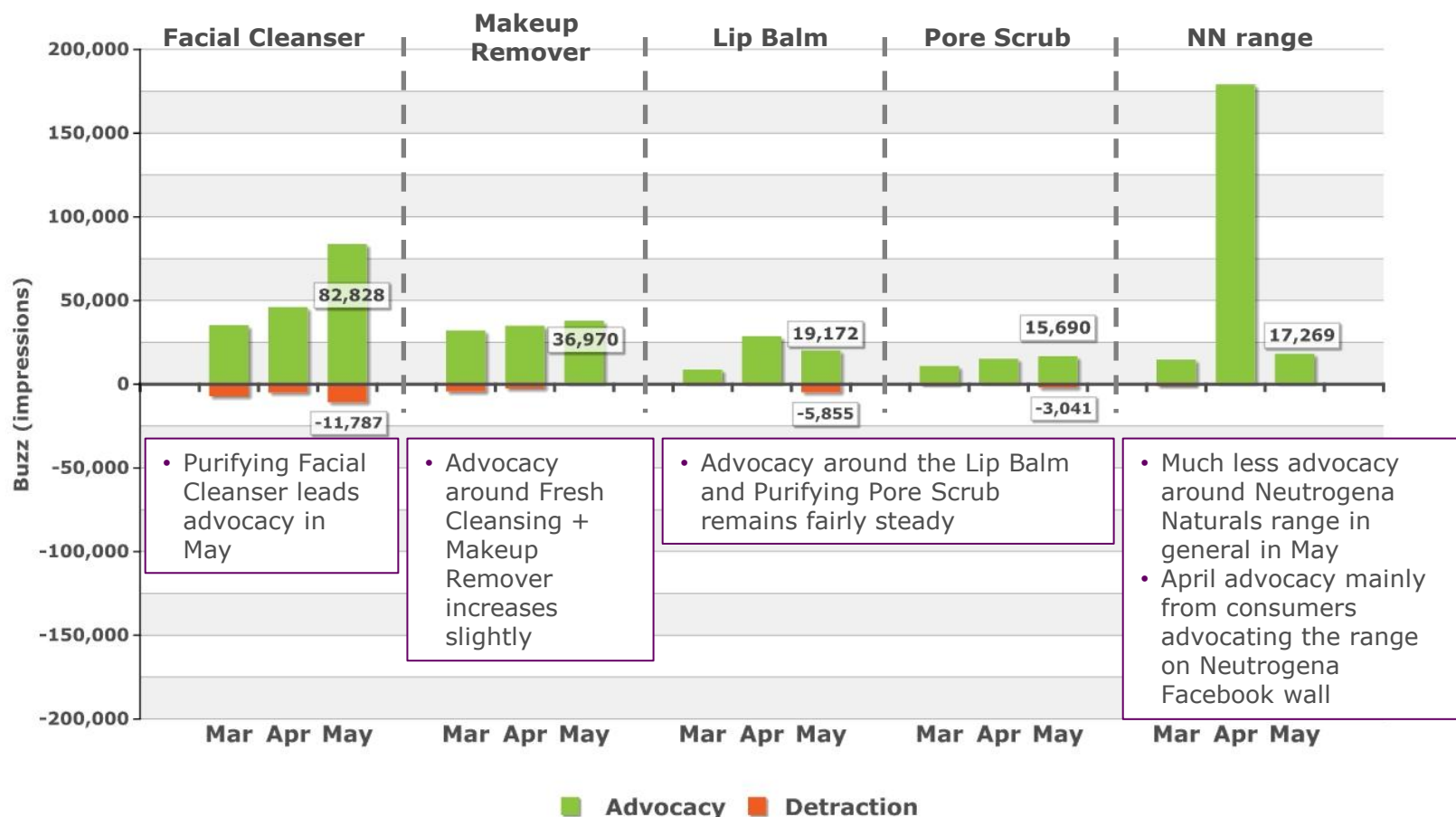
Advocacy and detraction drivers for Neutrogena Naturals: March to May 2011



Source: WaveMetrix

PRODUCT ADVOCACY: Facial Cleanser drives advocacy in May

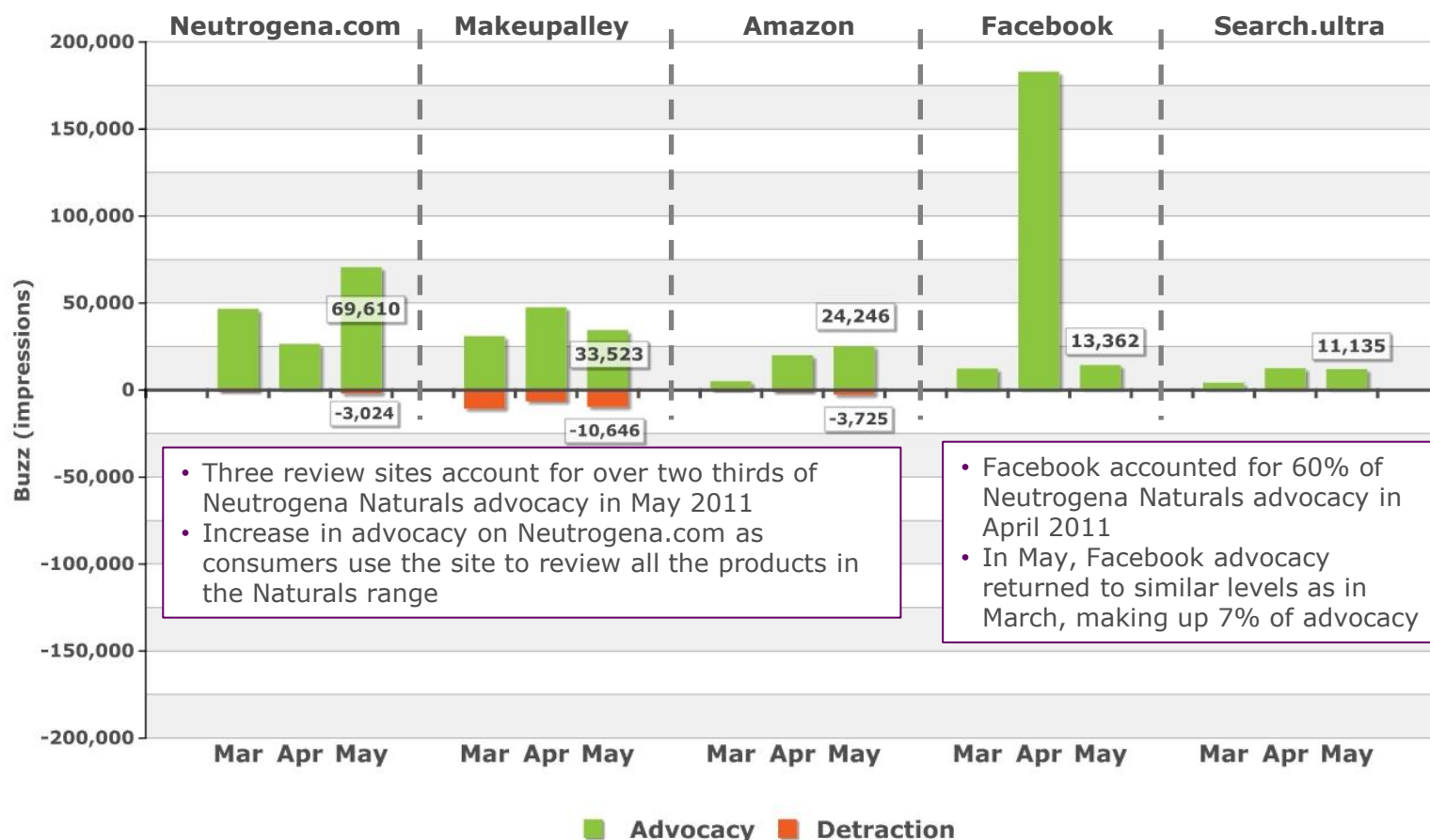
Product recommendations: advocacy and detraction by product



Source: WaveMetricx

ADVOCACY SOURCES: Neutrogena.com becomes top source of advocacy in May

Sources of recommendations: advocacy and detraction levels by site



Source: WaveMetrix

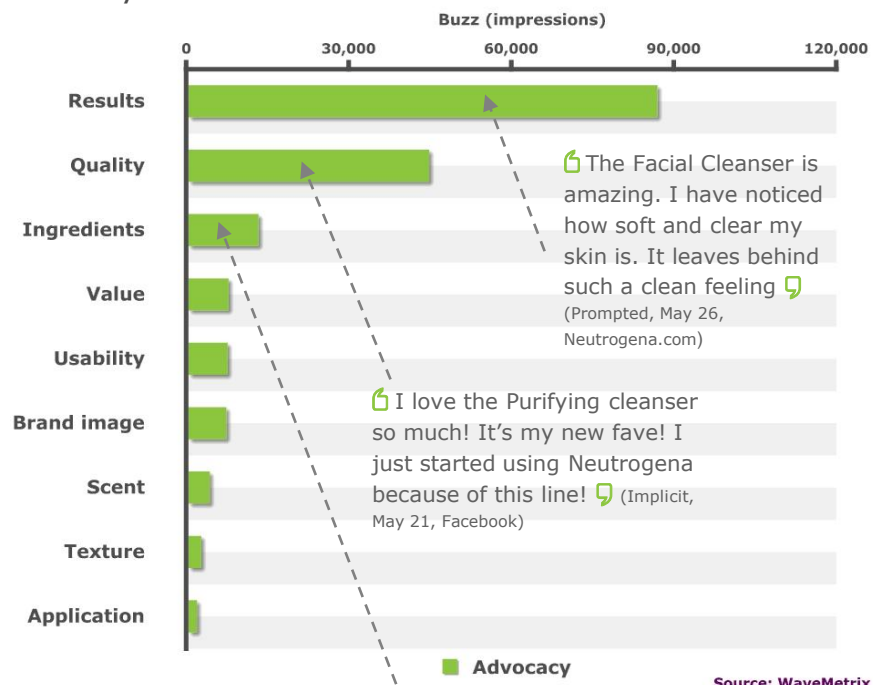




3. What drives advocacy and detraction for Neutrogena Naturals?

"Gentle", "clean" and "soft" Neutrogena Naturals results and "best" quality drive advocacy

Neutrogena Naturals: advocacy by topic in May 2011



“The Purifying Facial Cleanser is so good! It’s all natural with no harsh chemicals which I love. I recommend” (Prompted, May 31, Neutrogena.com)

“The Facial Cleanser is amazing. I have noticed how soft and clear my skin is. It leaves behind such a clean feeling” (Prompted, May 26, Neutrogena.com)

“I love the Purifying cleanser so much! It’s my new fave! I just started using Neutrogena because of this line!” (Implicit, May 21, Facebook)

Advocacy drivers

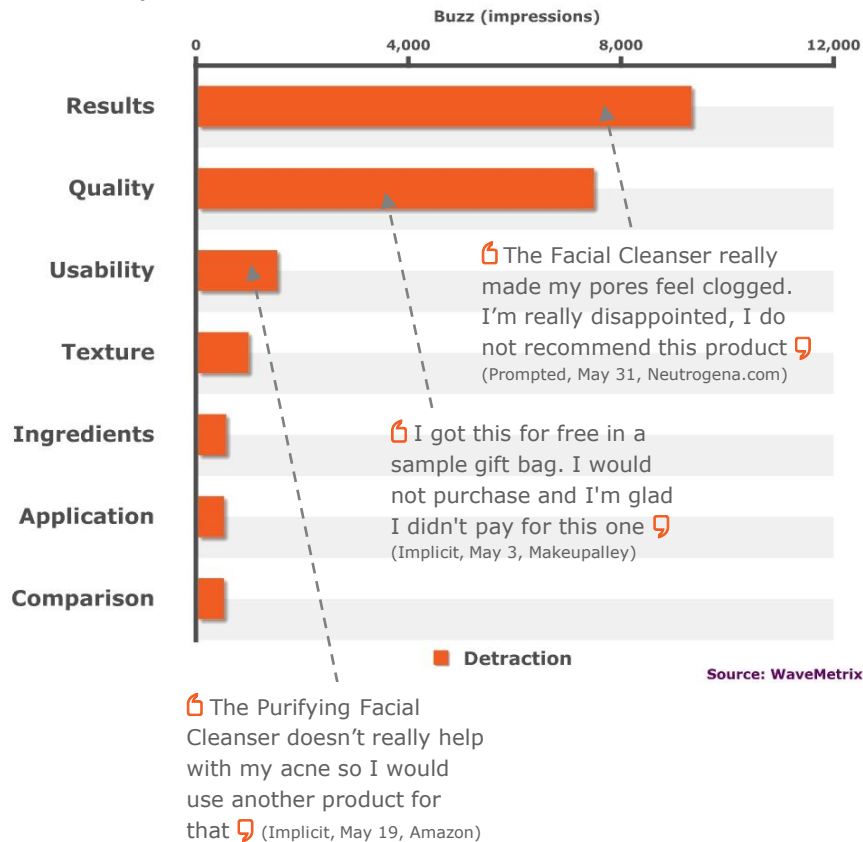
Consumers say Neutrogena Naturals will produce “incredible” and “wonderful” **RESULTS** that are “gentle” and “refreshing” and leave skin “clean”, “soft”, “glowing” and “gorgeous”

Consumers advise others on the “best” **QUALITY** of Neutrogena Naturals products that are “awesome”, “exquisite” and do “exactly as claimed”

The “natural” **INGREDIENTS** make the Neutrogena Naturals products “unique” and “worth trying” as “you will feel the difference” and they “support the environment”

Very low amount of Neutrogena Naturals detraction, but some warn of “disappointing” results

Neutrogena Naturals: detraction by topic in May 2011



Detraction drivers

Some warn others that they are “disappointed” with the **RESULTS** because the Facial Cleanser “didn’t feel clean” and “pores felt clogged” and the Lip Balm and Scrub are “dry” and “not anything special”

A few consumers detract from the **QUALITY** of Neutrogena Naturals products after trailing them for the first time. They say they “will not buy” from the range again

Two consumers advise others on the **USABILITY** of Neutrogena Naturals products as they are “not for acne” or “sensitive skin”

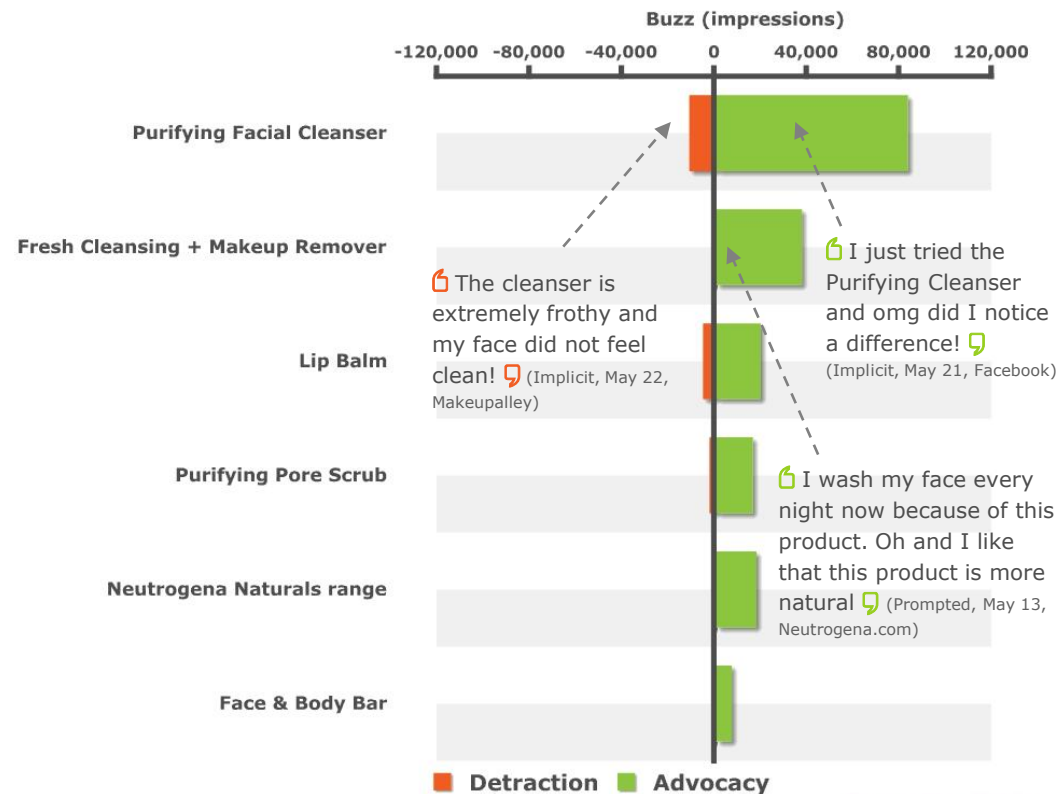


4. Which products drive advocacy?

Neutrogena Naturals advocacy in May is product specific and centres on the Purifying Facial Cleanser

- The Purifying Facial Cleanser drives Neutrogena Naturals advocacy in May 2011:
 - The Fresh Cleansing + Makeup remover and Lip Balm are also important advocacy drivers
- This represents a shift from April where over half of advocacy was not product specific:
 - Consumers advocated the Neutrogena Naturals range in general in response to content on the Neutrogena Facebook page

Neutrogena Naturals: advocacy and detraction by product in May 2011



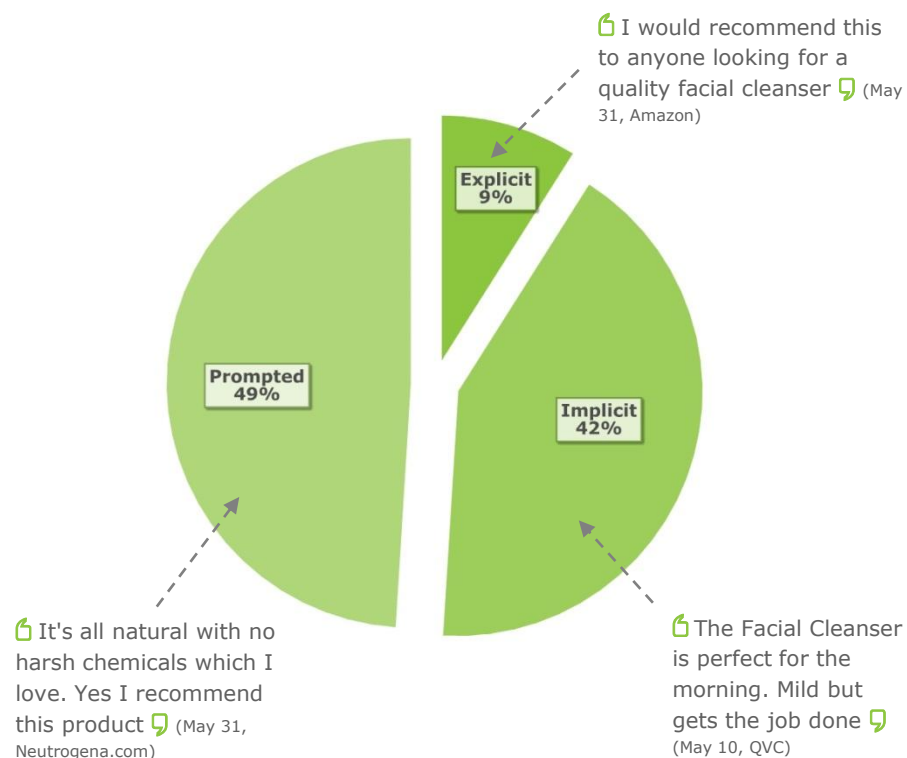


5. How do consumers recommend Neutrogena Naturals?

Neutrogena Naturals advocacy mainly implicit and prompted in May 2011

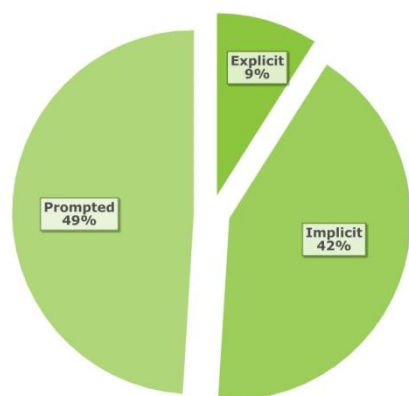
- Half of advocacy in May 2011 is prompted:
 - Consumers on review and shopping sites tick the “I recommend this product” option and then explain why
- Implicit advocacy also accounts for a substantial proportion of recommendations:
 - Consumers summarise why Neutrogena Naturals are “the best”, “perfect”, “effective” or “guarantee results”
- Explicit advocacy accounts for a minority of recommendations:
 - Consumers directly “recommend” or tell others “to buy” Neutrogena Naturals products

Neutrogena Naturals advocacy levels by advocacy type: May 2011



Quality and results drive all types of advocacy for Neutrogena Naturals

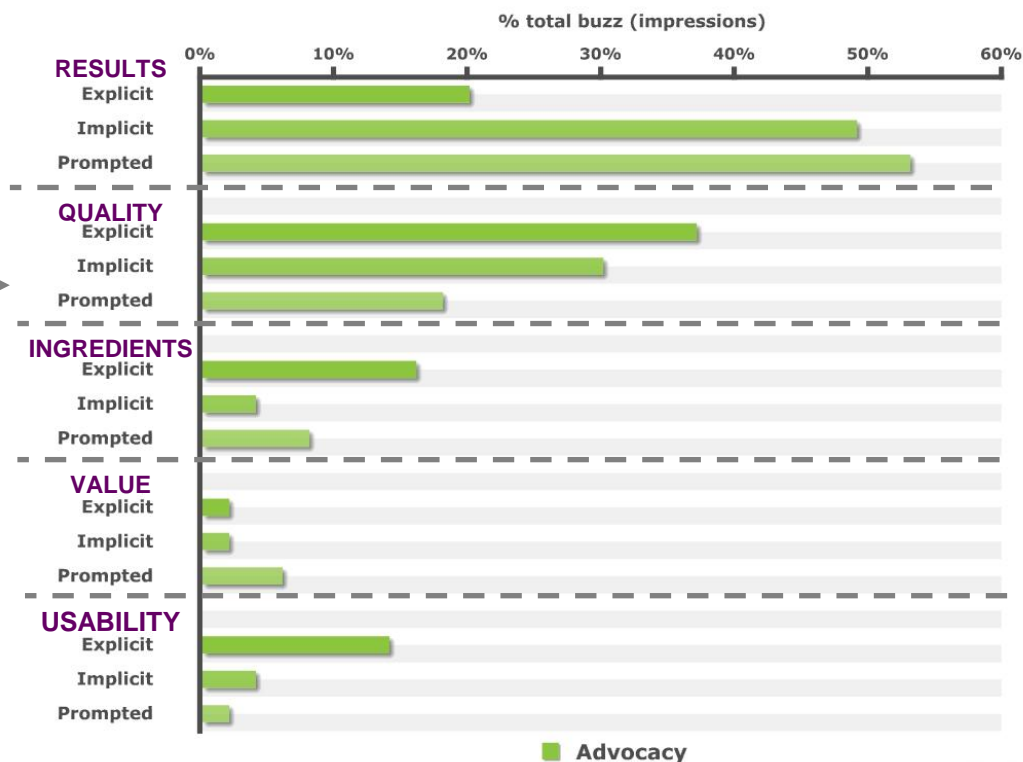
Neutrogena Naturals advocacy levels by advocacy type: May 2011



Source: WaveMetrix

- Quality and Results make up the majority of the three types of advocacy
- Quality is the main driver of explicit advocacy while results drive prompted and implicit advocacy

Neutrogena Naturals advocacy drivers by advocacy type: May 2011



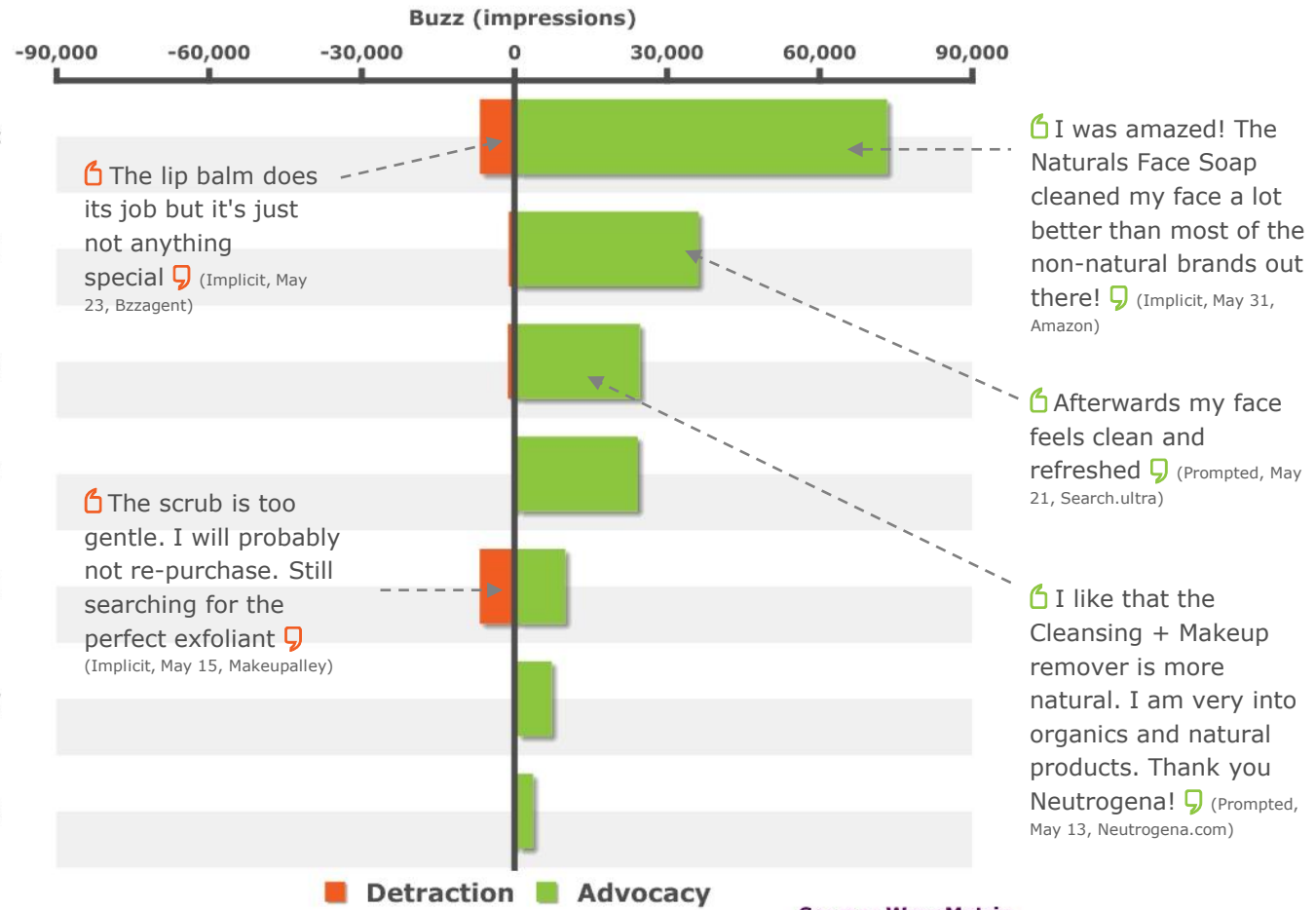
Source: WaveMetrix



6. Which brand values drive advocacy and detraction?

Neutrogena Naturals advocacy strongly supports the brand's "expert" image

Neutrogena Naturals: advocacy by brand values



WaveMetrix can analyse advocacy according to specific brand values

The WaveMetrix team of human analysts reads and interprets every recommendation and codes the brand value that best fits the opinion

Source: WaveMetrix

Consumers advocate Neutrogena Naturals as “expert”, “sensual” and “caring”

Detraction brand values

Some consumers warn that Neutrogena Naturals lacks **EXPERTISE** as the products are “not special” or “do not work” for “combination skin” or those with “acne”



Some say they “will not buy” the Lip Balm or Facial Cleanser again causing a negative impact on Neutrogena Naturals’ **ASPIRATIONAL** image

Advocacy brand values

Many consumers recommend Neutrogena Naturals as **EXPERT** because the products “do a good job”, are the “best” and “clean superbly”



Consumers advocate Neutrogena Naturals as **SENSUAL** because the products leave their face, lips and skin feeling “refreshed”, “soft” and “gorgeous”



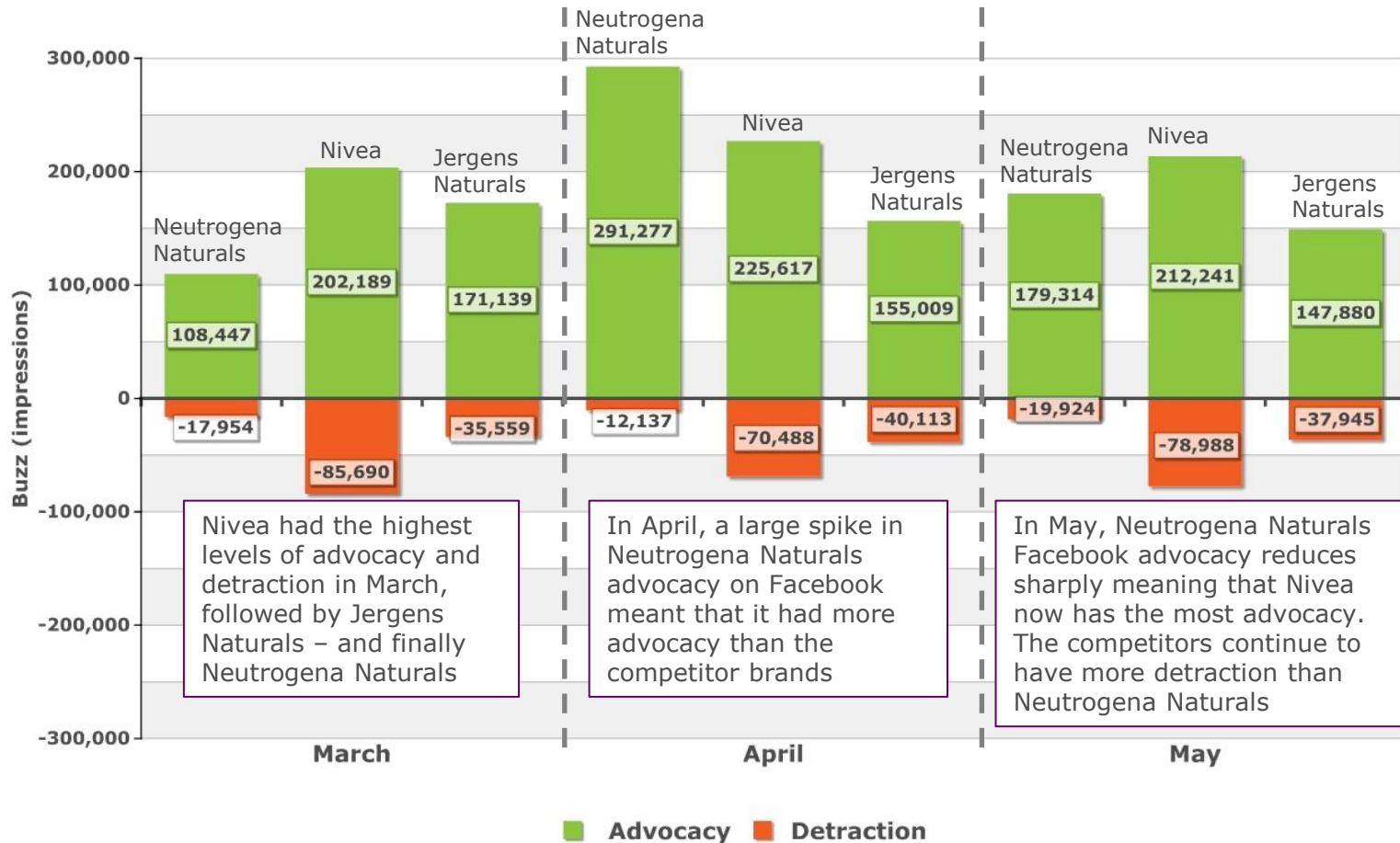
Consumers recommend Neutrogena Naturals as **CARING** due to the “natural ingredients” and “gentle” performance for “sensitive skin”



7. How does
Neutrogena Naturals
compare to
competitors?

Nivea and Jergens Naturals advocacy and detraction levels remain fairly consistent month-on-month

Advocacy and detraction levels in March to May 2011: Neutrogena Naturals vs. competitors



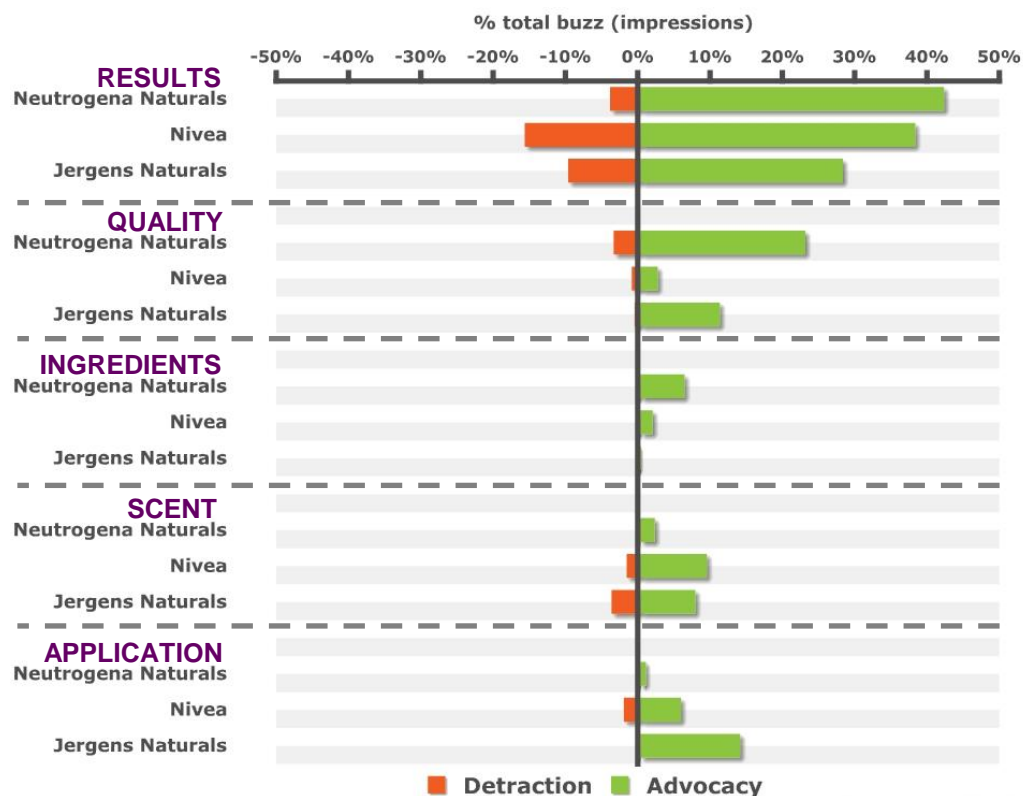
Source: WaveMetrix



Results is a key strength of Neutrogena Naturals compared Nivea and Jergens Naturals

- Results is not only the top advocacy driver for Neutrogena Naturals, it is also a key strength:
 - Results drives more advocacy and less detraction than for competitors
- Quality and ingredients are also important Neutrogena Naturals advocacy drivers:
 - Scent and application are more important to competitors

Advocacy and detraction: comparison between the three brands



"Super" results, "fresh" scent and "smooth" texture drive Nivea advocacy in May 2011

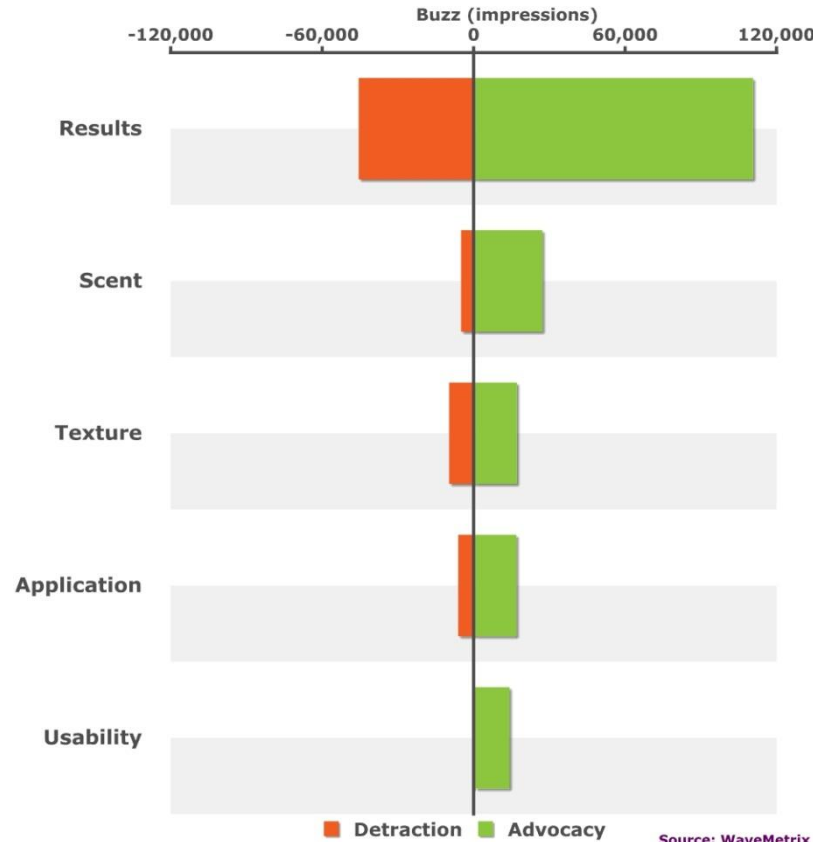
Detraction drivers

Some are "disappointed" with Nivea **RESULTS** that "don't work" and warn others that they "do not moisturize or hydrate" and can "dry or irritate skin"

Some consumers detract from Nivea products because the **TEXTURE** is "sticky", "greasy", "thick" and "uncomfortable"

A few consumers advise that you "must keep on **RE-APPLYING** the Nivea "A Kiss of" lip care products as they "rub off" and "don't last long"

Nivea: advocacy and detraction by topic in May 2011



Advocacy drivers

Nivea products will "moisturize lips", "tighten" cellulite, leave "skin soft and smooth", give a "natural tan" and produce "long-lasting" **RESULTS**

Nivea recommended for "pleasant", "light", "fresh", "sweet", "calming" and "soothing" **SCENT** of their products

The "light" **TEXTURE** of Nivea products drive advocacy as consumers say they feel "silky" and "creamy" and are not "greasy", "sticky" or "heavy"

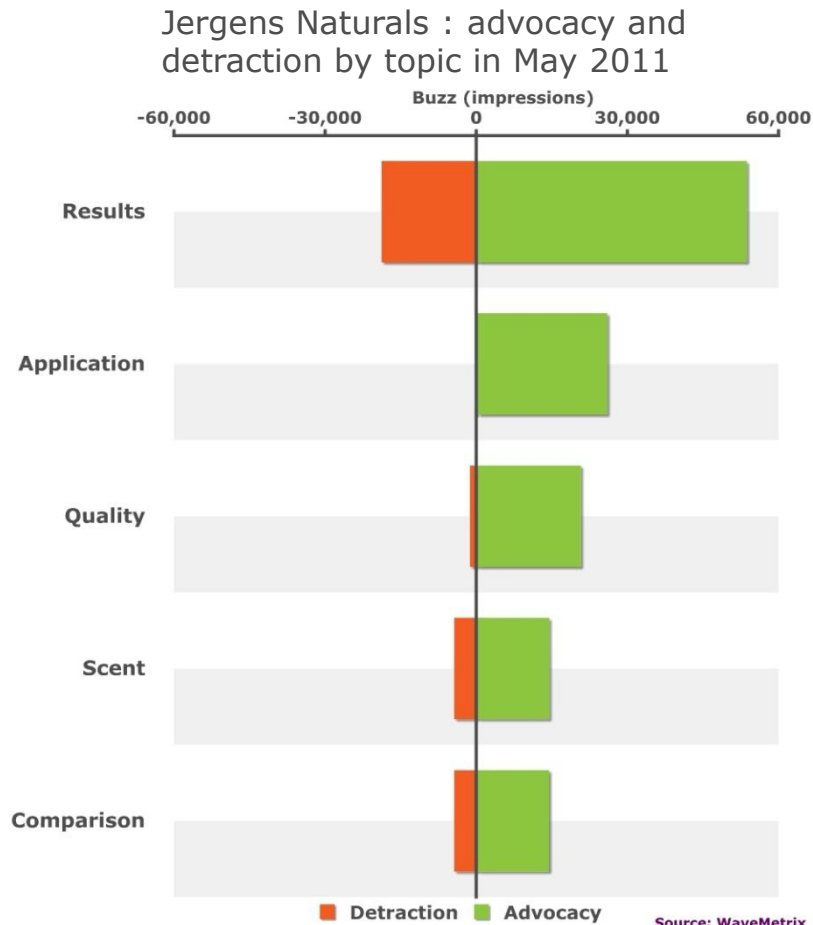
"Soft" results, "easy" application and "best" quality of Glow Moisturizers drive Jergens Naturals advocacy

Detraction drivers

Users warn others that the **RESULTS** of Jergens Naturals Glow Moisturizers either "turn your skin orange" or you "will not notice the difference"

A few consumers warn that they "cannot stand" the "horrid" **SCENT** of Jergens Naturals Glow Moisturizer products and "will not buy again"

Two consumers **COMPARE** and recommend L'Oreal's Sublime Glow products over Jergens Natural Glow while one "prefers Nivea products"



Advocacy drivers

Consumers say the **RESULTS** of the Jergens Naturals Daily Moisturizer "work quickly", will be "soft" and "long-lasting" and create a "natural" and "even" tan











Consumers recommend the Jergens Naturals Glow Moisturizer products because the **APPLICATION** is "quick", "easy" and it "goes on smoothly"

Consumers advocate the **QUALITY** Jergens Naturals Glow Moisturizer products as "amazing", "the best gradual tanners" and "a summer staple"





8. Who are the top
Neutrogena Naturals
advocates and
detractors?

Top 10 Neutrogena Naturals brand advocates for May 2011

Top 10	Buzz	Site/link	Product	Summary of discussion
Feelfree  <small>#1 DERMATOLOGIST RECOMMENDED</small>	6,246	Neutrogena http://bit.ly/y3owJF	Cleanser + Makeup remover	"Cannot be beaten at the price" as "takes off makeup instantly"
Swimmergirl  <small>#1 DERMATOLOGIST RECOMMENDED</small>	4,684	Neutrogena http://bit.ly/o2Vznz	Purifying Facial Cleanser	"Cleans my skin", but "doesn't work on my combination skin"
Sylvie W 	4,684	Beautyundercover http://bit.ly/x5FWBV	Lip Balm	"Dependable" brand provides "healthy, tried and tested" products
Goldiel  <small>#1 DERMATOLOGIST RECOMMENDED</small>	4,684	Neutrogena http://bit.ly/o2Vznz	Purifying Facial Cleanser	Leaves face "smooth, soft and clear", "refreshing" and "stress free"
Mzdiggi 	4,422	Makeupalley http://bit.ly/mxw2VZ	Cleanser + Makeup remover	"The only cleanser I've tried that has not made my skin break out"
Debra Bein 	4,389	Facebook http://on.fb.me/AAItAK	Purifying Pore Scrub	Neutrogena is "awesome" as the Pore Scrub is "my favorite"
Chickie 	4,064	Ulta http://bit.ly/zu0gpk	Cleanser + Makeup remover	"Best facial cleanser to date...No more dry tight skin...Clean and fresh"
Mbquinn33 	3,778	Makeupalley http://bit.ly/zqpv0B	Purifying Facial Cleanser	"I really do feel the difference between this and one with lots of chemicals in"
Neneice  <small>#1 DERMATOLOGIST RECOMMENDED</small>	3,535	Neutrogena http://bit.ly/xN0Phw	Lip Balm	"Better than any chapstick. It's so soft and kissable on my lips"
Abi  <small>#1 DERMATOLOGIST RECOMMENDED</small>	3,535	Neutrogena http://bit.ly/xN0Phw	Lip Balm	"This lip balm is exactly what it claims and more. It tastes so amazing"

Top 10 Neutrogena Naturals brand detractors for May 2011

Top 10	Buzz	Site/link	Product	Summary of discussion
Ensen2027 MakeupAlley	2,519	Makeupalley http://bit.ly/zqpv0B	Purifying Facial Cleanser	"Very disappointed. It is extremely frothy and my face did not feel clean"
Jmberry MakeupAlley	2,113	Makeupalley http://bit.ly/jMi82Y	Lip Balm	"I didn't find it very moisturizing at all and it wore off quickly"
Loveable Luna  #1 DERMATOLOGIST RECOMMENDED	1,561	Neutrogena http://bit.ly/o2Vznz	Purifying Facial Cleanser	"It didn't do anything, it really made my pores feel clogged"
Hurricanenika MakeupAlley	1,259	Makeupalley http://bit.ly/zqpv0B	Purifying Facial Cleanser	"I was breaking out absolutely everywhere. I stopped using it"
Thom16 MakeupAlley	1,259	Makeupalley http://bit.ly/zqpv0B	Purifying Facial Cleanser	"The first time I used it my face burned horribly. I had to throw it out"
ColdFire MakeupAlley	1,056	Makeupalley http://bit.ly/jMi82Y	Lip Balm	"I don't like this at all. It sort of sits there and disappears after 20 minutes"
Anisabby MakeupAlley	813	Makeupalley http://bit.ly/krVmKb	Purifying Pore Scrub	"Yes it cleans by skin bit it is no miracle product, it doesn't treat my breakouts"
Lizzieloveslipgloss MakeupAlley	813	Makeupalley http://bit.ly/krVmKb	Purifying Pore Scrub	"I really do not think it exfoliates my skin enough. It is too gentle"
MarmaladeJay MakeupAlley	813	Makeupalley http://bit.ly/krVmKb	Purifying Pore Scrub	"It dried my cheeks out and made my skin feel incredibly tight"
TC "Clan Mother" 	745	Amazon http://amzn.to/Alo7JK	Purifying Facial Cleanser	"Avoid this if you are sensitive to the Salicylic acid in Oxy pads"



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