

# Newell Brands (NWL)

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## Report Intent

- On February 24<sup>th</sup>, Newell Brands reported US based POS growth of +9% in its Elmer's Division for the 13 weeks ending 2/11/17, primarily driven by the emerging popularity of DIY slime crafting of which Elmer's Glue is a primary ingredient<sup>1</sup>. Elmer's annual brand revenue was report to be \$81.5MM in 2015<sup>2</sup> in comparison to Newell Brands' 2017 projected total company revenue of \$14.62 billion and projected total company sales growth of 3.25%<sup>3</sup>.
- To assess changes in consumer interest in Newell Brands' Elmer's white craft glue product (in the wake of the children's DIY "Slime" crafting trend). During Q2 2017 (Jan-March) by measuring YoY changes in consumer driven social conversations related to Elmer's Glue and DIY slime crafting.

## Report Key Findings\*\*

### **TOP TAKEAWAY: Social Data suggest that the DIY slime crafting trend is continuing to grow in popularity and has potential to positively impact Q2 sales of Newell Brand's Elmer's Glue division in a meaningful way.**

- Organic mention frequency of [Elmers+Glue] across Twitter is up 38% YoY and 34% QoQ. Mention frequency within YouTube video comments is up 94% and 48% QoQ. White craft glue (most commonly Elmer's glue) is a primary ingredient of DIY slime crafting. YoY Twitter mention frequency of [get + "lips done"] is up 252%, and [injection + "botox"] is up 64%.\*
- Organic mention frequency of [Glue +slime] across Twitter is up 942% YoY and 133% QoQ suggesting that the DIY slime crafting trend is continuing to grow in popularity and has potential to positively impact Q2 sales of Newell Brand's Elmer's Glue division in a meaningful way. However, this tag had fewer than 500 mentions in the quarter and should therefore be viewed with caution. Mention frequency across blogs up 194% YoY and 409% QoQ. Mention frequency within Youtube video comments is up 1395% YoY and 169% QoQ.
- Organic mention frequency of [Glue +sold out] across Twitter is up 1,225% YoY and 133% QoQ suggesting that sales of glue products are exceeding retailer supply. However, this tag had fewer than 200 mentions in the quarter and should therefore be viewed with caution. Mention frequency across blogs up 39% YoY and 23% QoQ. Mention frequency within YouTube video comments is up 1126% YoY and 651% QoQ.
- Organic mention frequency of [make + "slime"] across Twitter is up 24% YoY and 65% QoQ. Mention frequency across blogs up 46% YoY and 47% QoQ. Mention frequency within YouTube video comments is up 144% YoY and 124% QoQ.




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- Organic mention frequency of ["DIY" + "slime"] across Twitter is up 24% YoY and 65% QoQ. Mention frequency across blogs up 239% YoY and 68% QoQ. Mention frequency within YouTube video comments is up 288% YoY and 18% QoQ.

\*\*All social data is estimated and best used as a directional indicator of change rather than a precise measure of change in company or sector performance metrics.

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**Report Tags, Tag Mention Volume, Tag Frequency Delta**

| Tag             | Approximate<br>Twitter<br>Mentions<br>[report<br>period] | YoY Change<br>in Twitter<br>Mention<br>Frequency | QoQ Change<br>in Twitter<br>Mention<br>Frequency | YoY Change<br>in Blog<br>Mention<br>Frequency | QoQ Change<br>in Blog<br>Mention<br>Frequency | YoY Change<br>in Video<br>Comment<br>Mention<br>Frequency | QoQ Change<br>in Video<br>Comment<br>Mention<br>Frequency |
|-----------------|--|--|--|---|---|---|---|
| Elmers +Glue    | >1,000   | +38%   | +34%   | -16%  | 0%  | +94%  | +48%  |
| Glue +slime     | <5000  | +942%  | +133%  | +194%   | +409%   | +1,395%   | +169%   |
| Glue +sold out  | <200   | +1,225%  | +324%  | +39%  | +23%  | +1,126%   | +651%   |
| Make + "slime"  | >3,000   | +24%   | +65%   | +46%  | +47%  | +144%   | +124%   |
| "DIY" + "slime" | <200   | +124%  | -37%   | +239%   | +68%  | +288%   | +18%  |

As a minimum barometer of reliability, the volume of estimated quarterly Tag mentions on Twitter (different from normalized Tag frequency) should be no less than 1000. Tags with quarterly mention volume less than 1000 should be viewed with caution. Estimated Twitter mention volume is deduced by applying a 10x multiplier on the Tag's volume of mentions originating from Twitter's decahose. Twitter's Decahose comprises approximately 50 million tweets daily and represents a 10% randomized sample of Twitter's firehose.

**Report Content Stream**

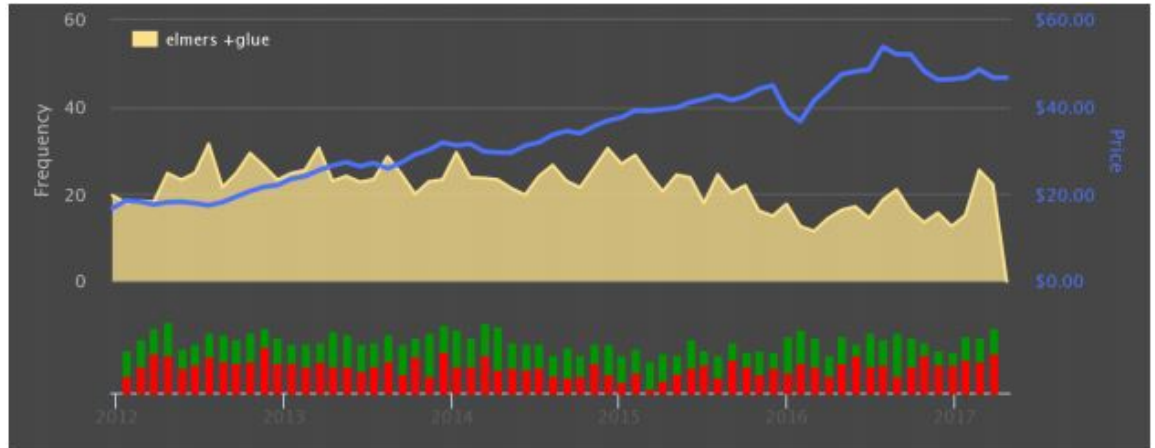
- Twitter Mention Frequency (a normalized measure of tag mentions compared to the total number of messages across Twitter). Blog data, Video Comments Report Details

*Note: All quarters in this report refer to the company's fiscal quarters.*

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**Report Details**

Mention Frequency of [Elmers + Glue] up YoY and QoQ Organic mention frequency of [Elmers + Glue] across Twitter is up 38% YoY and up 34% QoQ in Q1 17. Glue like Elmers glue is one of the main ingredients of homemade slime.



**Mention Frequency of [Make + "Slime"] up YoY and QoQ**

Organic mention frequency of [make + "slime"] across Twitter is up 24% YoY and 65% QoQ.



<sup>1</sup>[http://s1.q4cdn.com/122517005/files/doc\\_presentations/2017/feb/CAGNY2017PresentationFinal\\_Web.pdf](http://s1.q4cdn.com/122517005/files/doc_presentations/2017/feb/CAGNY2017PresentationFinal_Web.pdf)

<sup>2</sup> <https://www.statista.com/statistics/258818/sales-of-the-leading-adhesive-brands-in-the-united-states/>

<sup>3</sup> <http://ir.newellbrands.com/investor-relations/press-releases/press-release-details/2017/Newell-Brands-to-Reaffirm-2017-Outlook-at-CAGNY-Conference/default.aspx>



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### **Representative Mentions**

[Elmers + Glue]

[https://www.tickertags.com/dashboard/#!/dashboard?ticker=NWL&start\\_epoch=1325376000&end\\_epoch=1492447696&timespan=max&group=month&sort=trend&term\\_id\\_1=4040372&social=incidences&stream=tweets&links=false&retweets=false&tags\\_open=true&feed\\_open=true&chart\\_alerts=true&chart\\_max=true](https://www.tickertags.com/dashboard/#!/dashboard?ticker=NWL&start_epoch=1325376000&end_epoch=1492447696&timespan=max&group=month&sort=trend&term_id_1=4040372&social=incidences&stream=tweets&links=false&retweets=false&tags_open=true&feed_open=true&chart_alerts=true&chart_max=true)

[Glue +slime]

[https://www.tickertags.com/dashboard/#!/dashboard/charting?ticker=NWL&start\\_epoch=1325376000&end\\_epoch=1492447696&timespan=max&group=month&sort=trend&term\\_id\\_1=4040371&social=incidences&stream=tweets&links=false&retweets=false&tags\\_open=true&feed\\_open=true&chart\\_alerts=true&chart\\_max=false](https://www.tickertags.com/dashboard/#!/dashboard/charting?ticker=NWL&start_epoch=1325376000&end_epoch=1492447696&timespan=max&group=month&sort=trend&term_id_1=4040371&social=incidences&stream=tweets&links=false&retweets=false&tags_open=true&feed_open=true&chart_alerts=true&chart_max=false)

On May 31, 2018, TickerTags, Inc. was acquired by M Science LLC. Prior to this date, reports were prepared and distributed by Ticker Tags, Inc.