

TRIBE DYNAMICS

Tribe Top 10

October 2019 US Luxury Fashion

Introduction

With social networks influencing consumer behavior more than ever, brand success has become increasingly linked to digital word-of-mouth. Tribe Dynamics helps beauty, fashion, and lifestyle brands drive high-impact earned media, connecting the dots between influencer conversation and consumer interest. Our advanced marketing technology allows brands to identify and effectively manage relationships with scaled communities of passionate content creators. Earned Media Value (EMV), our proprietary metric for measuring the online engagement of influencer content, has become the industry standard for evaluating the performance of digital earned media at the brand level and across the competitive landscape.

Tribe Top 10, our monthly publication series, ranks the top beauty and fashion brands in earned media performance and reveals exclusive insights into trending content, products, and brands. We publish, and work with brands, in Cosmetics, Skincare, Haircare, Luxury, Non-Luxury Fashion, and Fashion Retailers in the U.S., as well as in 13 international markets. Visit TribeDynamics.com for full access to our reports.

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What Is EMV?

Earned Media Value, or EMV, is Tribe Dynamics' proprietary metric for quantifying the estimated value of consumer engagement with digital earned media. Our holistic approach assigns a unique value to a piece of content based on the engagement received from followers and consumers. This value is then attributed to the specific brands mentioned within the post. EMV can be used to evaluate the earned performance of individual marketing campaigns and benchmark brands within the competitive landscape.

Based on content from 120,000 of the most influential content creators across 14 country-specific markets, EMV reveals brands that are not just capturing consumer interest, but poised for significant growth.

Posts by:

- Influencers
- Brands
- Retailers
- Publications

On platforms including:

- Instagram
- YouTube
- Facebook
- Pinterest
- Twitter
- Websites
- Blogs

Engagement via:

- Comments
- Tweets/Retweets
- Favorites
- Likes
- Pins/Repins
- Shares
- Video Views

Glossary of Terms

Influencer Tiers

Powerhouse Influencer

Ambassador with over 1M followers on their primary channel.

Established Influencer

Ambassador with 300k to 1M followers on their primary channel.

Mid-Tier Influencer

Ambassador with 100k to 300k followers on their primary channel.

Micro-Influencer

Ambassador with fewer than 100k followers on their primary channel.

Community Metrics

Community Size

The total number of ambassadors who created content about a brand within a given time period.

Posting Frequency

The average number of posts created per ambassador for a brand within a given time period.

Ambassador Potency

The average amount of EMV driven per ambassador for a brand within a given time period.

Other

Posting Consistency

The percentage of influencers in a brand's ambassador community who also mentioned the brand during the previous quarter (denoted by "one-quarter posting consistency"), previous two quarters ("two-quarter posting consistency"), or previous three quarters ("three-quarter posting consistency").

Sponsored EMV

A post is labeled "sponsored" if it contains hashtags or language that denote a sponsorship, such as "#ad" or "#spon."

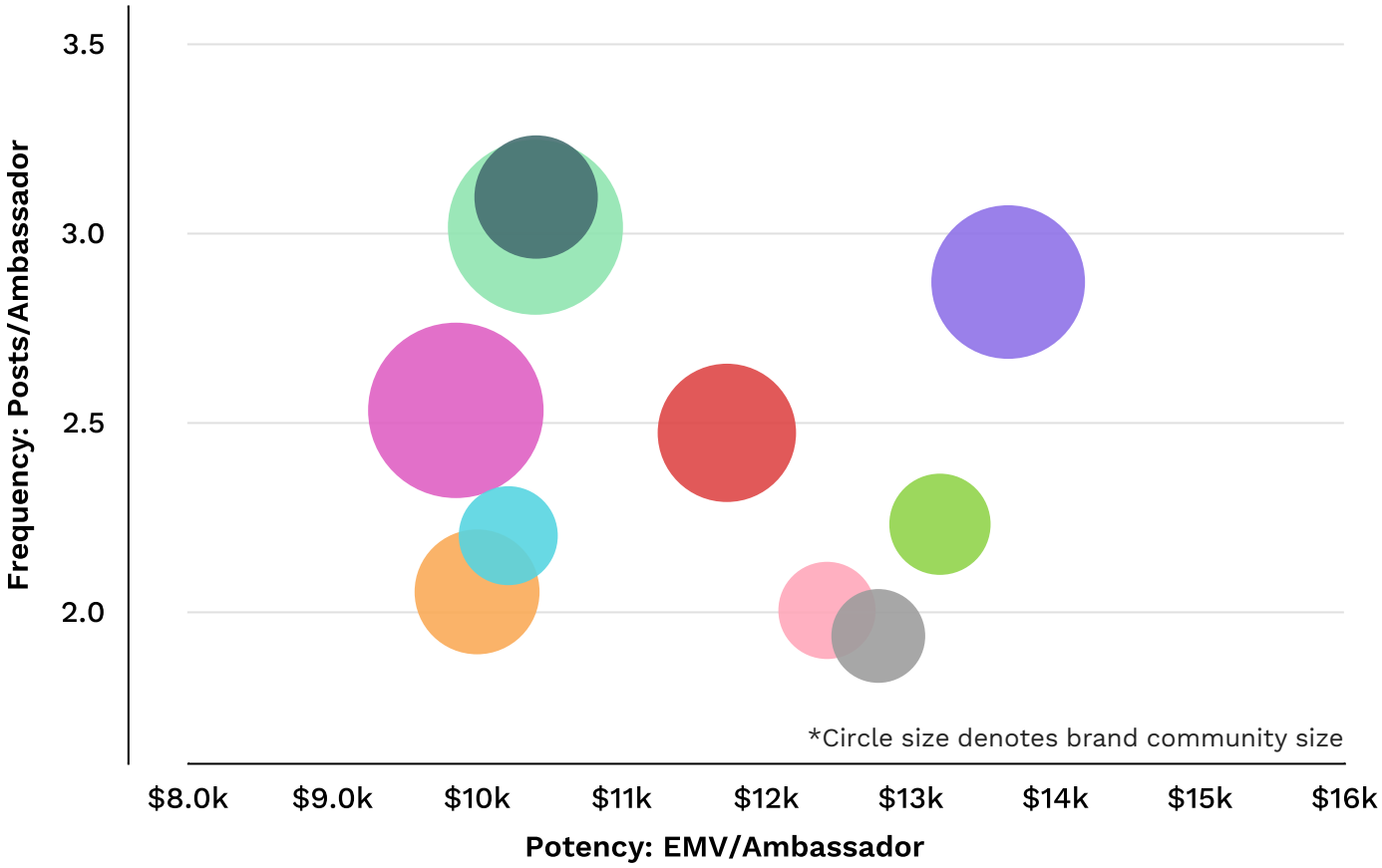
Top 10 Luxury Fashion Brands

Rank	Brand	October 2019 EMV	MoM
1st ↗ 2	Louis Vuitton	$28,203,446	↗ 9%
2nd ↗ 3	Chanel (Fashion)	$27,862,083	↗ 9%
3rd ↘ 2	Gucci (Fashion)	$26,506,606	↘ -10%
4th ↘ 2	Dior (Fashion)	$19,615,807	↘ -32%
5th ↗ 2	Prada	$13,848,912	↘ -17%
6th → 0	Saint Laurent (YSL) (Fashion)	$13,635,810	↘ -35%
7th ↗ 1	Fendi	$11,832,368	↘ -27%
8th ↗ 2	Balenciaga	$10,262,687	↘ -11%
9th ↘ 5	Versace	$9,827,350	↘ -62%
10th ●	Valentino	$8,748,303	↘ -23%

● This brand was not in the previous month's Top 10.

Top 10: Community Metrics

Community Size, Frequency, and Potency



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Louis Vuitton	2,062	2.9	$13,678
Chanel (Fashion)	2,677	3.0	$10,408
Gucci (Fashion)	2,689	2.5	$9,857
Dior (Fashion)	1,672	2.5	$11,732
Prada	1,330	3.1	$10,413
Saint Laurent (YSL) (Fashion)	1,363	2.1	$10,004
Fendi	896	2.2	$13,206
Balenciaga	826	2.0	$12,425
Versace	769	1.9	$12,779
Valentino	856	2.2	$10,220

Leaderboard Highlights

A Closer Look at Luxury Fashion



Chanel

Chanel jumped from No. 5 in September to No. 2 in October with $27.9M EMV, a 9% month-over-month growth. While most Top 10 brands benefited from Paris Fashion Week content in September, Chanel closed out the event with a rooftop show on October 1, helping #PFW garner $1.1M EMV from 143 content creators this month. Fashion and beauty influencer Camila Coelho (@camilacoelho on Instagram) drove $150.4k EMV as #PFW's top earner, showing off her look for the brand's Spring 2020 show in four posts.



Notable Brand: Giambattista Valli

Though it missed the Top 10, Giambattista Valli's $5.4M EMV October total reflected an impressive 195% month-over-month surge that far outpaced the Top 10's average 20% decline. This growth can be largely attributed to hype surrounding the brand's collaborative collection with H&M, which launched in November. Together, the two brands previewed the range with an October runway show in Rome, inspiring impactful content from attendees like actress Sofia Carson (@sofiacarson on Instagram) and blogger Chiara Ferragni (@chiaraferragni). The associated #Project accrued $2.7M EMV as Giambattista Valli's top October hashtag.



Notable Brand: Tiffany & Co.

While Tiffany & Co.'s $5.4M EMV landed outside of October's Top 10, the brand achieved a notable 43% month-over-month increase. This improvement stemmed largely from the launch of Tiffany & Co.'s first comprehensive jewelry collection for men, which the brand fêted with a star-studded launch party at the Hollywood Athletic Club. Attendees including actresses Lili Reinhart (@lilireinhart on Instagram) and Rowan Blanchard (@rowanblanchard) shared photos from the event, helping #TiffanyMens power $579.5k EMV as Tiffany & Co.'s top October hashtag.

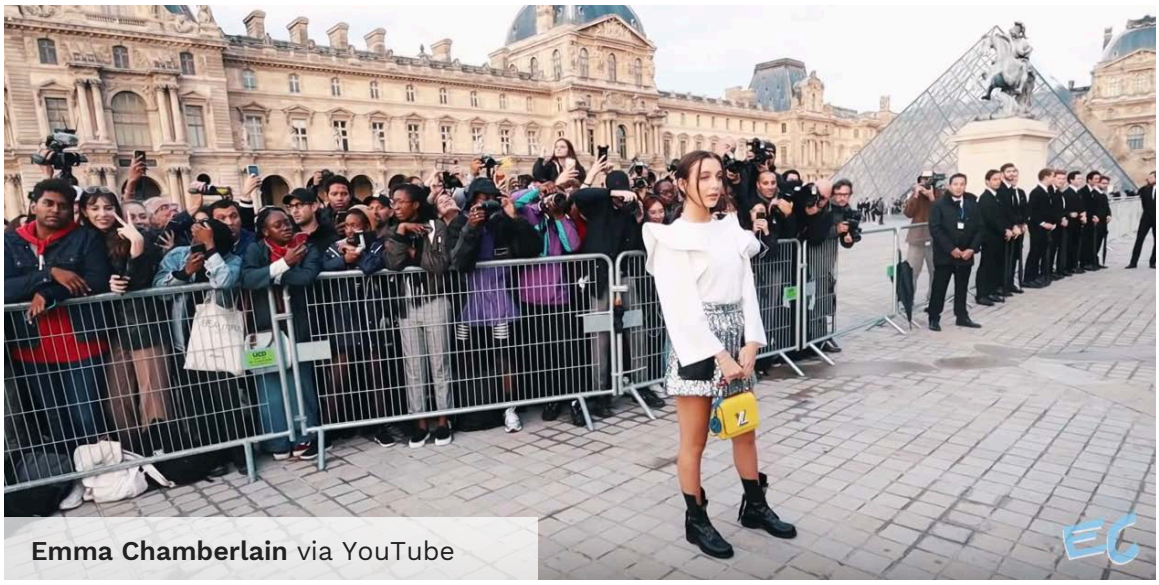
Spotlight

What stood out in Luxury Fashion this month?

Louis Vuitton Steals No. 1 Spot With #PFW, #LVSeoul

Louis Vuitton claimed its first-ever No. 1 Top 10 spot in October, beating out Chanel and Gucci with $28.2M EMV, a 9% month-over-month growth. The brand enjoyed impactful content creation around its Spring 2020 Paris Fashion Week show on October 1, earning praise from A-list attendees including Justin Timberlake (@justintimberlake on Instagram) and Jessica Biel (@jessicabiel). Louis Vuitton also inspired high-earning content by inviting Gen Z YouTube sensation Emma Chamberlain to its show for the second consecutive season. The influencer dedicated an entire video to the “amazing” experience, which included being styled by the brand in “the perfect outfit for me” and meeting Louis Vuitton creative director Nicolas Ghesquière. Emma drove $711.4k EMV across five posts as one of the brand’s top October ambassadors, while #PFW netted $870.2k EMV via 78 content creators.

Louis Vuitton also made waves with the opening of its Maison Seoul location, inviting influencers like Aimee Song (@aimeesong) and Leonie Hanne (@leoniehanne), who also attended PFW with the brand, to celebrate the new flagship store. Attendees chronicled the trip, including a fun welcome dinner and a traditional Korean tea ceremony, in content tagged #LVSeoul, which garnered $994.0k EMV from 11 influencers as one of Louis Vuitton’s top five October hashtags.



Emma Chamberlain via YouTube