



# Brand & Influencer Survey

Q3 2017 Beauty & Fashion

# Introduction

## What do influencers *really* want from brands?

In this report, we share the results of Tribe Dynamics' first annual Influencer Marketing Survey, highlighting influencer perspectives on their experiences as content creators, brand partners, and consumers. In September, we asked both influencers and brands about their experiences in the earned media space to better understand the current state of influencer marketing:

- How are marketing strategies, internal priorities, resources, and budgets shifting over time?
- What's holding teams back from growing their earned media efforts?
- What are the gaps in understanding between brand strategies and influencer preferences?

In addition to presenting exclusive insights from the survey, we also highlight the top-performing beauty and fashion brands of Q3 2017.

Thank you for your continued support.

Conor Begley and Jon Namnath  
*Co-Founders, Tribe Dynamics*

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

# What Is EMV?

Earned Media Value (EMV) is Tribe Dynamics' prescribed metric that quantifies the estimated value of publicity gained through digital earned media and their respective engagement levels. Our holistic approach assigns a specific dollar value to each piece of content, based on the perceived value of digital word-of-mouth to brands within the industry. EMV serves as a way to allow for benchmarking across marketing activities and across brands.








## Posts From

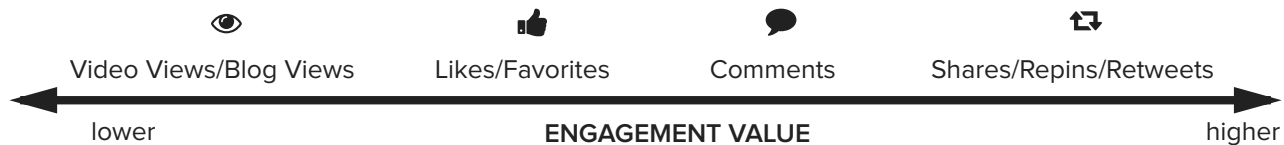
-  Influencers
-  Brands
-  Retailers
-  Publications

## On Platforms Including

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

## Measuring Engagement

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



# The Survey

Tribe Dynamics' first annual Influencer Marketing Survey took a two-pronged approach to investigating the experiences of both brands and influencers in the earned media space. Our survey asked brands about their influencer marketing strategies, looking at how their internal priorities, resources, and budgets have shifted over time. We also incorporated influencer perspectives, asking bloggers about their experiences as content creators and brand partners. By analyzing responses from both groups in tandem, our resulting research report identifies gaps in understanding between brand strategies and influencer desires, and highlights areas where brands performed well and where they could improve. In combining both perspectives, the report offers tangible and data-backed strategies for improved brand-influencer collaboration.

## About our respondents:

### Brand Respondents

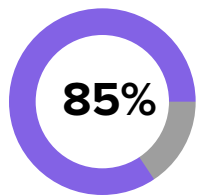
- **79%** of the individuals who responded on behalf of their brand were mid-level managers or senior executives
- **45%** of brands earned over \$100M in annual revenue in 2016
- **54%** of brands were owned by a major corporation
- **Cosmetics brands** made up the largest share of respondents, followed by skincare, haircare, fragrance, and fashion brands

### Influencer Respondents

- **65%** of respondents fell between the ages of 25-34, followed by 35-44, 18-24, and 45+
- Respondents were almost **evenly split** between full-time (52%) and part-time (48%) influencers
- **77%** of respondents were micro-influencers (ambassadors with fewer than 100K followers each on their YouTube and Instagram accounts)
- The most **common categories** that our respondents identified with were: cosmetics, fashion, skincare, lifestyle, haircare, travel, and wellness

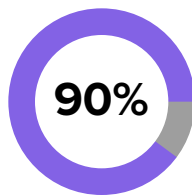
# Despite Progress, Brands Report Insufficient Resources for Earned Media Programs

Brand respondents noted that while their companies and senior leadership recognized the value of earned media, they lacked the resources necessary to fully execute their influencer marketing programs.



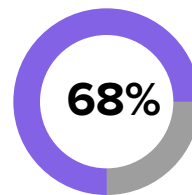
## Leadership Buy-In

85% of brands reported having significant support from senior leadership for their influencer marketing programs.



## Growing Budgets

90% of the brands surveyed had increased their earned media budget in the past five years.



## Too Many Hats

68% of brand respondents said that they did not feel that their influencer marketing team had the resources necessary to fully support their influencer marketing operations.

## Top 3 Roadblocks



Inadequate  
Manpower



Insufficient  
Budget



Difficulty Finding  
Influencers

## Finding Quality Influencers

**Q: What words or phrases would you use to describe your brand's best influencers?**



“

*We need to identify influencers outside of what's trendy. We need to identify a new crop of skincare enthusiasts who look and feel genuine with our brand.*

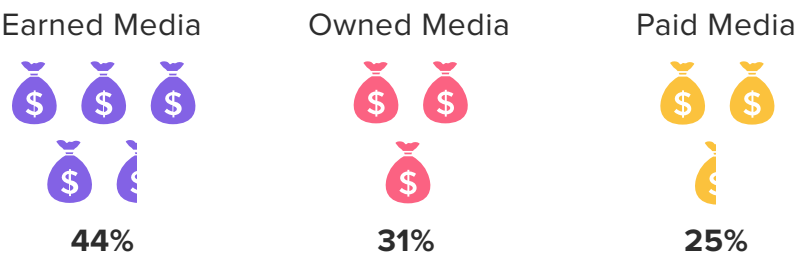
— Skincare Brand Executive

# Budget Is a Primary Concern for Earned Media Programs

When asked what was the biggest thing that they wanted to change about their influencer marketing program moving forward, brands overwhelmingly wanted to increase their budget.

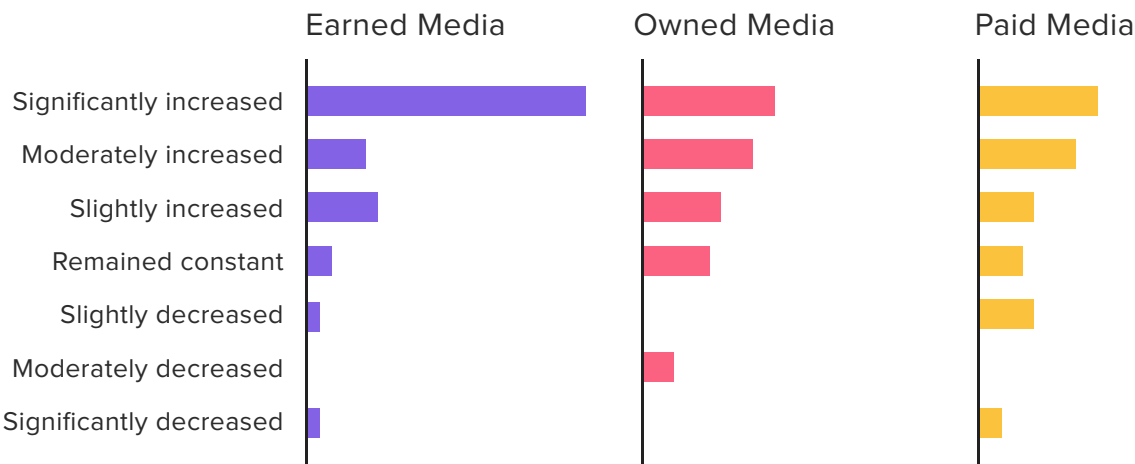
## Current Budget Allocation

Brands spent the greatest proportion of their budget (44%) on earned media, followed by owned media and paid media.



## Change in Budget Allocation in Past Five Years

A majority of brand respondents reported increases in their earned, owned, and paid media budgets, with the greatest increase occurring in earned media.



“Often, influencers create this amazing content and the brand fails to recognize that. I know some brands only want to share their own original marketing content, but shouting [us] out on Twitter or Instagram Stories would be a great way to show influencers some love!

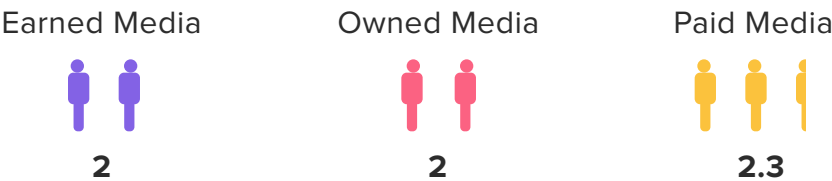
— Lifestyle Influencer

# Marketing Teams Are Growing Across the Board

While 40% of respondents reported equal headcount distributions across earned, owned, and paid media teams, 22% still reported more employees in paid media, highlighting the resource constraints of nascent influencer marketing programs.

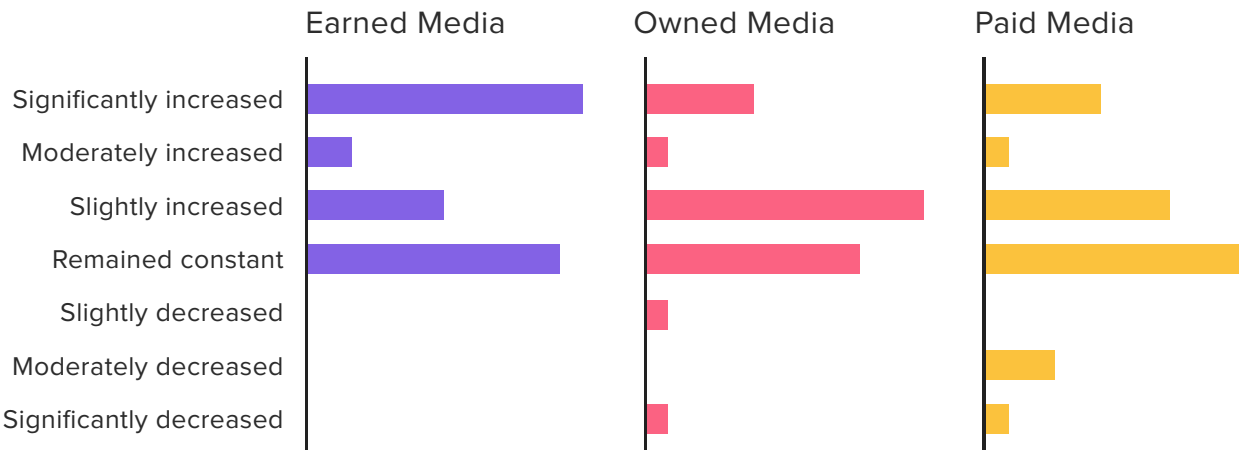
## Current Headcount

Brands in our survey reported a slightly larger average headcount in paid media.



## Change in Headcount in Past Five Years

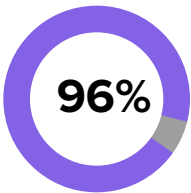
13% of brands reported a decrease in their paid media headcount, while not a single brand cited a decrease in their earned media headcount.



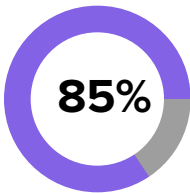
“ *[Brands should] get more involved! Bloggers and influencers are here to stay!* ”  
— Beauty and Fashion Influencer

# Brands Find Success in Product Collaborations and Social Channel ‘Takeovers’

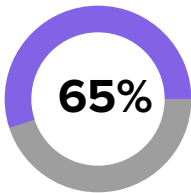
While a majority of brands surveyed recognized the value of product sends in building relationships with influencers, top brands recognized the immense value of activations that can help propel bloggers’ careers.



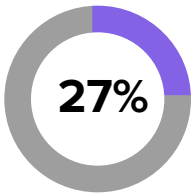
96% of brands sent product to influencers



85% reposted influencer content to their owned media channels



65% hosted an exclusive event for influencers



27% did a product collaboration with an influencer

## Top EMV-Generating and Fastest-Growing Brands Focus on Building Relationships

To see whether specific influencer activations correlated with a brand’s EMV performance, we analyzed responses from respondents affiliated with the top EMV-generating brands and fastest-growing brands, comparing their tactics to those favored by the general respondent pool. We found that top EMV-generating brands were 44% more likely than average to invite an influencer to “take over” their owned media channels, and 42% more likely to host influencers on a trip. The fastest-growing brands were 9% more likely to do an influencer product collaboration, while top EMV-generating brands were only 1% more likely.

Activation	Top EMV-Generating Brands*	Fastest-Growing Brands**	Other Brands
Product sends	100%	89%	100%
Reposting influencer content	100%	89%	77%
Hosted an exclusive influencer event	75%	56%	77%
Sending personal gifts (excluding products)	75%	67%	54%
Influencer “takeover” of owned social channel	88%	56%	46%
Give influencers promotional code/affiliate links	38%	33%	69%
Influencer competition	25%	56%	46%
Hosted an influencer trip/getaway	50%	22%	31%
Product collaboration	25%	44%	15%

\* Brands whose Q3 EMV ranked in the top quartile of all brands that participated in the survey.  
\*\*Brands whose Q3 EMV quarter-over-quarter growth ranked in the top quartile of all brand respondents.



# Product Sends and Channel 'Takeovers' Are Effective Engagements for Influencers

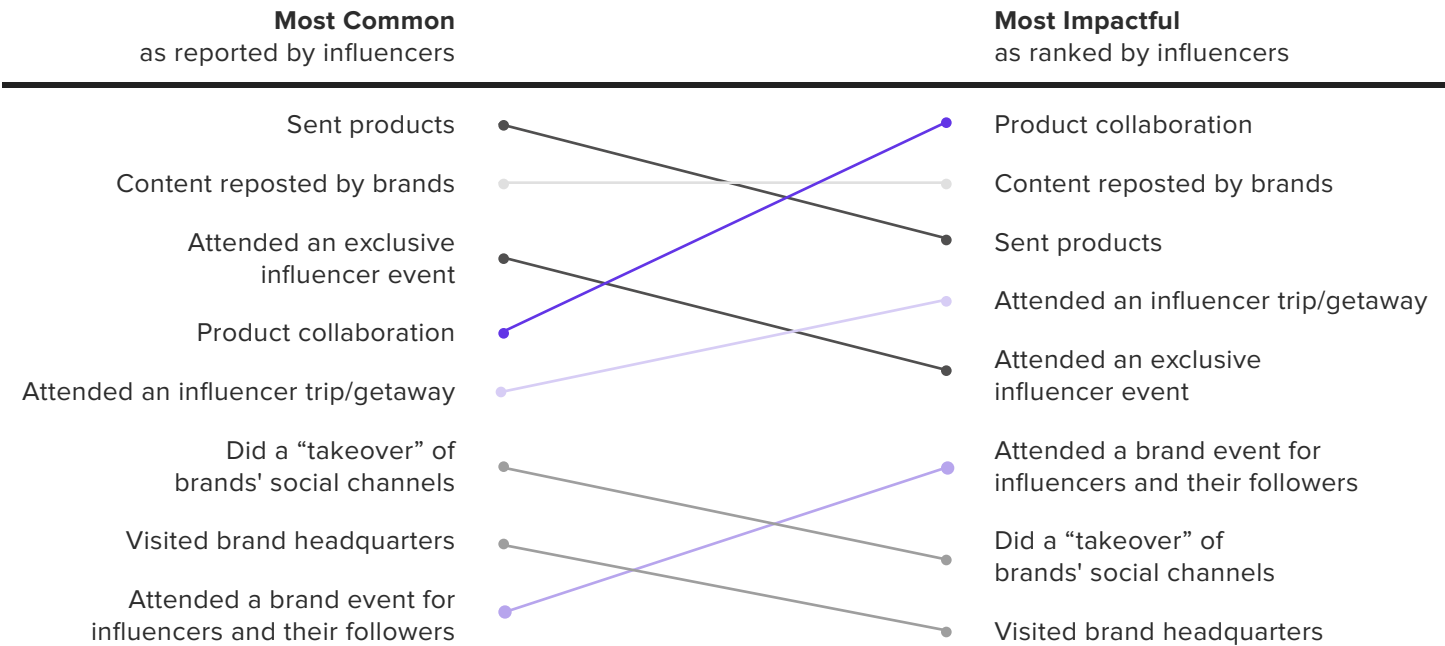
We surveyed influencers about brand interactions that they were most commonly involved in, as well as the types of brand engagement that they deemed most impactful. Influencer assessments of brand engagements point to a disconnect between brand strategies and influencer preferences, revealing channel takeovers as a powerful and underutilized brand activation.

- While 80% of influencer respondents ranked a brand’s reposting of influencer content to their owned media channels as one of the two most impactful brand-influencer engagements, only 21% of brand respondents considered owned media channel integration a top-two priority.
- Only 23% of influencers in Q2 2017 were tagged by a brand on the brand’s owned media channels, and only 8% of brand respondents would give themselves “above average” marks for integrating their earned and owned media strategies.
- 77% of influencer respondents cited product sends as one of the most impactful brand engagements. 64% listed product collaborations, and 60% mentioned brand trips.
- When asked what motivated them to create content about a brand, 89% of influencers listed direct outreach from brands, highlighting the need for brands to increase the headcount of their earned media teams.

“

*I’d like to see more support from brands in terms of reposting and [liking content] on social media. A lot of brands send out product that I’ll make sure to use, but they never follow up or let me know if I did a good job of representing their brand.*

— Beauty Influencer

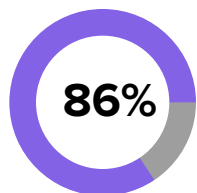


# VOICE OF THE CUSTOMER:

## Influencer Purchasing Habits

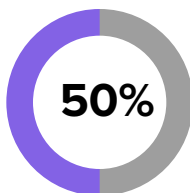
### Product Quality and Recommendations from Community Are Primary Drivers for Influencers

Influencers made their purchases primarily based on product quality and reviews from fellow influencers, and put little stock in advertisements.



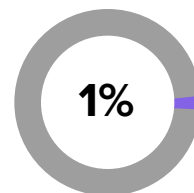
#### Quality Comes First

86% of influencers listed product quality as one of their top two criteria for purchasing a product.



#### Community Drives Conversion

50% listed positive reviews from other influencers as one of their top two criteria.



#### Influencers Ignore Ads

Only 1% reported purchasing a product after seeing it in an advertisement.



*In-depth, head-to-head product comparisons were a popular content category on YouTube, pointing to influencers' emphasis on product quality.*

### Influencers Overwhelmingly Purchase at Specialty Retailers

While influencers purchased products from multiple sources, specialty retailers were preferred among influencers.

**96%** of influencers reported buying beauty products at a specialty store such as Sephora or Ulta.

**78%** purchased products directly from the brand (online or in-store).

**64%** purchased products from department stores.

## Prestige Brands Favored By Influencers

47% of influencers ranked prestige brands (e.g., Anastasia Beverly Hills, MAC) as their favorite brand category. The next two categories ranked #1 by influencers were luxury brands (e.g., Dior Beauty, Givenchy Beauty), at 15%, and influencer-created brands (e.g., Jeffree Star Cosmetics), at 10%.

Both luxury brands and influencer-created brands had relatively large numbers of core fans (who rated them No. 1 or No. 2) but also strong detractors (who ranked them last), causing heritage brands (e.g., Estée Lauder, L'Oréal Paris) to boast a stronger mean ranking across all influencers.

### Average Rank

- 1 Prestige Brands
- 2 Heritage Brands
- 3 Luxury Brands
- 4 Mass Brands
- 5 Influencer-Created Brands

## Influencers Want More Diverse and Natural Product Offerings

When asked what types of product they would like to see brands focus on developing, influencers underscored a need for “greener” and natural products, and overwhelmingly reported the importance of offering complexion products that work for a larger range of skin tones.



“

*I would love to see more beauty products that are ‘clean,’ as I think it’s something consumers are moving toward. [Consumers] are becoming more and more aware each day of the [need] to take care of our bodies, our skin, and our health—the ingredients in the products I’m using have been top of mind!*

— Beauty and Wellness Influencer



“

*[Brands need to release] more shade ranges for foundations. Everyone deserves to have a correct match with their skin tone.*

— Beauty and Skincare Influencer

# Key Takeaways

## Invest in Product Quality

86% of influencers listed product quality as one of their top two criteria for purchasing a product, indicating a pressing need for brands to prioritize the quality of their offerings.



“

*Highly effective products with easy-to-photograph packaging are key.*

— Beauty Influencer

## Invest in Fostering Influencer Careers

When asked about their career goals, 61% of influencers wanted to remain or become a full-time influencer. Other respondents viewed being an influencer as a stepping stone to a related career in the beauty or lifestyle space, with 18% wanting to work in-house for a brand and 14% hoping to start their own brand.

Bloggers wanted brands to be more cognizant of the hard work, passion, and effort that they put into their content.

“

*I would like [brands] to understand that blogging is a full-time job that I take seriously.*

— Beauty and Lifestyle Influencer





## Invest in Relationships

Working with smaller-scale influencers was the No. 1 requested change by influencers regarding brand-blogger interactions.

Many influencers stressed that brands could be featured in more high-quality, on-brand content if they reached out to more than just powerhouse influencers (influencers with more than 1M followers on their Instagram and YouTube accounts).



“

*If brands solely want to work with influencers who have millions [of followers], they're really losing out in the long term. Working with smaller influencers ... shows people that you are a genuine brand [and] that you're willing to work with a smaller influencer because you believe in their content and their message.*

—Beauty and Fashion Influencer

## Invest in Internal Education

Brands need more resources in order to execute successful and authentic influencer-marketing programs. 68% of brand respondents said that they do not feel that their influencer marketing team has the budget and staff necessary to fully support their influencer marketing operations.

Brands expressed that they needed a way to measure the success of their programs to justify increased spending on influencer marketing.



“

*[I would like to see] more manpower and budget to ramp our [influencer marketing] efforts up.*

—Cosmetics Brand Representative



# TRIBE TOP 10 | BEAUTY

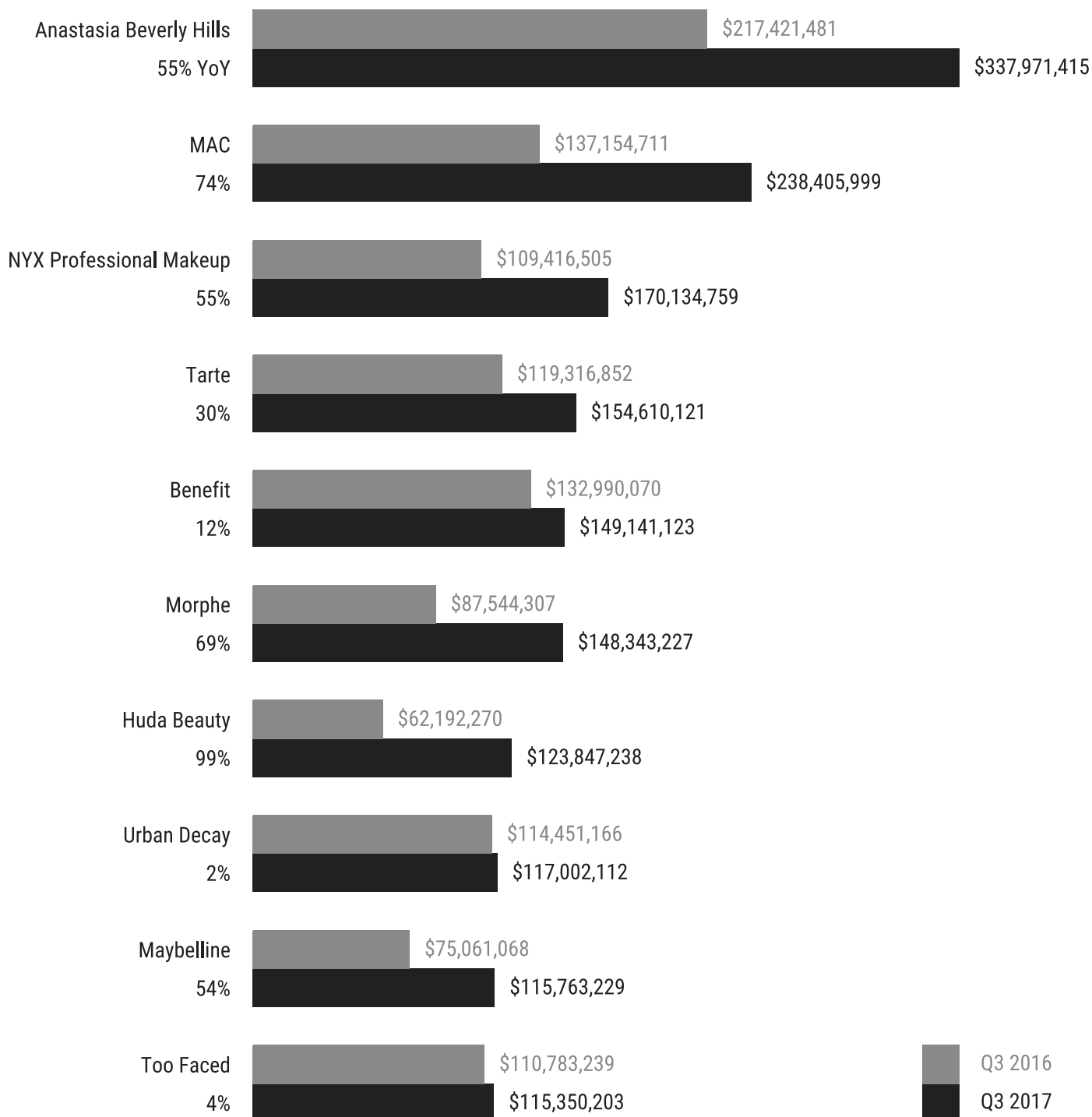
Q3 2017

# Cosmetics

## EMV Leaderboard Highlights

- 1.** Benefit hosted a #BenefitBrowSearch (\$7.2M EMV) competition that offered 20 finalists the chance to win \$50,000 in a series of brow-styling challenges. Powerhouse YouTubers like James Dickinson (Instagram's @jamescharles, 1.8M subscribers) served as coaches for the contestants, many of whom were micro-influencers.
- 2.** NYX Professional Makeup celebrated its sixth annual NYX Face Awards with host Patrick Simondac (YouTube's PatrickStarr, 2.9M subscribers), a former contestant turned star influencer.
- 3.** Morphe collaborated with beauty gurus Ourfa Zinali (@ourfazinali) and Brittany Barragan (@brittanybearmakeup) on the Morphe x Ourfa Vinyl Lip Contouring Set and Morphe x Brittany Bear 360 Nose Contour Collection.

## Top 10 Cosmetics EMV





*Rising Brand:*

# Fenty Beauty

Ignites Makeup  
Community With  
NYC Launch

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*Rihanna's smash-hit makeup line inspired much-needed conversations on diversity in the beauty industry.*

When Fenty Beauty launched on September 8, 2017, the cosmetics brand took social media by storm. Created by singer and style icon Rihanna (@badgalriri on Instagram), Fenty Beauty accrued \$72.0M EMV in just one month, with bloggers racing to praise both the quality of the brand's products and the unprecedented inclusivity of its shade range. While other brands have featured a similar number of shades, the Pro Filt'r Soft Matte Longwear Foundation's 40 shades spanned a strikingly wide range of skin tones. The brand earned the enthusiastic endorsement of women of color within the beauty community, many of whom had long been calling for more representation.

Rihanna fêted the launch of Fenty Beauty with a party in NYC, inviting established beauty YouTubers like Alissa Ashley (778.8K subscribers) and Nyma Tang (440.0K subscribers), as well as powerhouse vlogger Jeffree Star (jeffreestar, 5.4M subscribers). The influencers got to swatch and try on Fenty Beauty products, with many singling out their favorite finds on their social channels. Tweeting a video of herself testing out the Killawatt Freestyle Highlighter at the

event, Alissa emphatically praised the product as "so bomb." Her behind-the-scenes glimpse of the launch captivated followers, who eagerly retweeted the influencer's preview of the hyped product. Alissa's video was one of Fenty Beauty's highest EMV-driving posts in Q3, powering \$139.1K EMV. In a more in-depth review and tutorial, the blogger pledged to support the brand because it had "released 40 shades on [its] first launch. I respect that, and I use brands that I respect." Alissa emerged as a top ambassador for Fenty Beauty, netting \$763.5K EMV across a prolific 60 posts.

Following the launch, the Internet erupted with influencers eagerly reviewing Fenty Beauty products on YouTube and Instagram. Armed with goody bags of product from the launch party, attendees tested their finds on camera, lauding the brand for fulfilling its promise of inclusivity. In an episode of "The Darkest Shade," Nyma Tang's YouTube series devoted to testing the deepest foundations offered by brands, the blogger enthusiastically praised the Pro Filt'r Soft Matte Longwear Foundation. Noting that she often struggled to find foundations that she could work with, Nyma added that it



**5.4M Views | 155.5K Likes**  
Nyma Tang via YouTube

“melted [her] heart” to witness girls who looked like her getting shade-matched at Sephora, and thanked Fenty Beauty for accommodating a diverse range of skin tones. Nyma also endorsed the product’s performance, sharing that she “absolutely love[d] the finish” and would “definitely” continue to use it. The widely shared review, which earned more than 5.1M views, proved just as fruitful for Nyma as for Fenty Beauty. The established YouTuber had reached 300K subscribers prior to releasing the review, but gained over 100K new fans in the span of a month. Nyma continued to post about the Pro Filt’r Soft Matte Longwear Foundation and other Fenty Beauty products during Q3, driving a total of \$274.9K EMV over five posts mentioning the brand. The Killawatt Freestyle Highlighter and Pro Filt’r Soft Matte Longwear Foundation closed the quarter as Fenty Beauty’s top two products, powering a respective \$9.3M and \$4.9M EMV.

“

*I saw other dark-skinned girls in Sephora getting matched in [Fenty Beauty] foundation and it melted my heart.*

— Nyma Tang

“

*Got to support Fenty [Beauty] because they released 40 shades on their first launch. I respect that, and I use brands that I respect.*

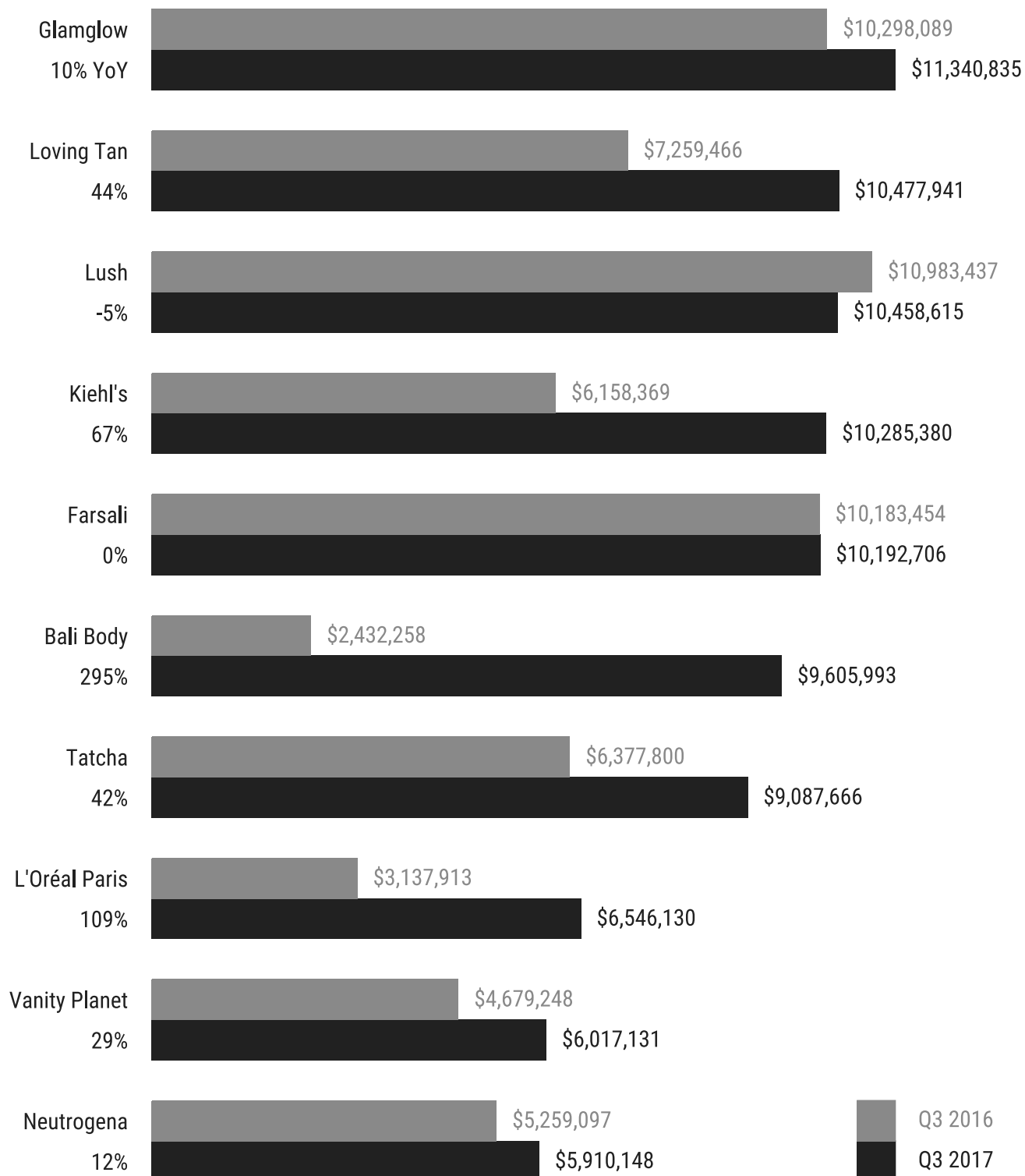
— Alissa Ashley

# Skincare

## EMV Leaderboard Highlights

- 1.** Kiehl's engaged influencers around two charitable campaigns, #LifeRide8 (\$2.3M EMV) and #KiehlsxAutismSpeaks (\$289.9K), and celebrated the launch of its new Cucumber Herbal line with an exclusive #CucumberAndChill (\$167.0K) party in LA.
- 2.** Tatcha's newly released Violet-C Radiance Face Mask (\$454.3K EMV) received positive reviews from beauty influencers and saw consistent inclusion in "routine" videos on YouTube.
- 3.** L'Oréal Paris continued to benefit from mid-tier and micro-influencer conversations surrounding its Pure-Clay and Hydra Genius lines. #Pureclay and #clayyourway netted \$277.7K and \$53.9K EMV, respectively.

## Top 10 Skincare EMV

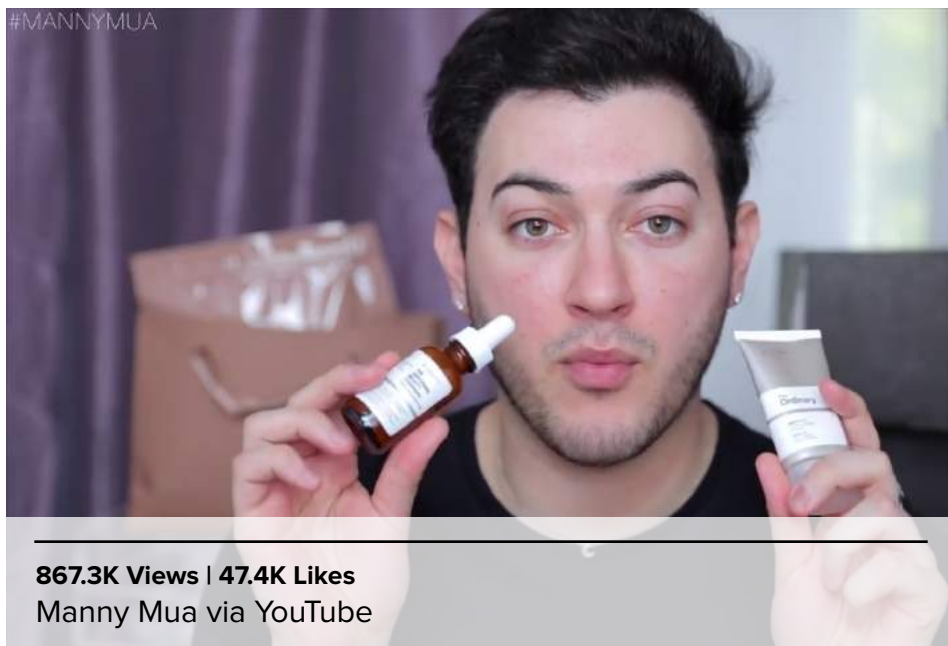


Rising Brand:

# The Ordinary

Inspires Passion With  
Effective Skincare

*The Ordinary posted significant YoY and QoQ growths, powered by enthusiastic content from both powerhouse vloggers and micro-influencers.*



The Ordinary netted \$1.8M EMV in Q3. Launched in summer 2016 by parent company Deciem, the brand enjoyed an astronomical 1,974% year-over-year growth and a 19% quarter-over-quarter increase thanks to enthusiastic mentions from the influencer community. Powerhouse YouTubers such as Manny Gutierrez (Manny Mua, 3.7M subscribers) and Ingrid Nilsen (3.9M subscribers) raved about the brand's low price point. In his product-send "Unboxing" video, Manny shared that daily use of the "really inexpensive" Granactive Retinoid 2% Emulsion serum and Retinol 1% cream noticeably improved his skin texture. Ingrid shouted out the Hyaluronic Acid 2% + B5 serum and Niacinamide 10% + Zinc 1% serum as "super affordable" alternatives to the Glossier serums in her hour-long "July Favorites" livestream video. Though deeming the Hyaluronic Acid 2% + B5 serum "way more hydrating than the Glossier [Super Bounce serum]," Ingrid maintained a balanced and honest review, recognizing that the Niacinamide 10% +

Zinc 1% serum did not wear particularly well under her makeup. Manny and Ingrid generated a respective \$74.8K and \$19.9K EMV in Q3.

Throughout the quarter, The Ordinary's ultra-affordable prices continued to inspire extensive YouTube "dupe" content. Influencer Raquel Mendes dedicated an entire YouTube video to comparing more expensive products to their corresponding "duplicates" from The Ordinary. For example, Raquel preferred The Ordinary's Glycolic Acid 7% Toning Solution over Pixi Beauty's Glow Tonic because she saw "more results," and it helped with "fading [her] spots and acne more quickly." In an "empties" video, established vlogger Jessica Braun (YouTube's Jessica Braun | JAMbeauty89, 416.4K subscribers), like Ingrid Nilsen, recommended The Ordinary's Hyaluronic Acid 2% + B5 serum over Glossier's Super Bounce serum because "they've got a lot of the same ingredients in them." Raquel and Jessica drove \$4.6K and \$12.3K EMV, respectively, over the quarter.

“

*I feel like the texture of my skin has really improved. I genuinely believe it's from using [the Granactive Retinoid 2% Emulsion serum and Retinol 1% cream].*

— Manny Gutierrez

A variety of The Ordinary's products also proved especially popular among micro-influencers, who often emphasized the specific benefits of each ingredient. In her "Must Have Anti-Aging Ingredients" video, which featured several of The Ordinary's products, YouTuber Elle Leary (Elle Leary Artistry, 34.3K subscribers) called the 100% Organic Cold-Pressed Rose Hip Seed Oil a "beautiful product" that she uses "almost every night." In her "Deciem Haul" video, skincare and lifestyle vlogger Joanna (Joanna's Logic vs Luxury, 11.8K subscribers) credited fellow skincare micro-influencer Márcia (@skinminimalist on Instagram, 16.7K followers) as her inspiration for purchasing the Granactive Retinoid 2% Emulsion serum, before sharing that it was less irritating than other retinoids that she had tried. In total, an impressive 77% of The Ordinary's Q3 posts were created by micro-influencers.



**146.6K Views | 2.4K Likes**  
Ingrid Nilsen via YouTube

“

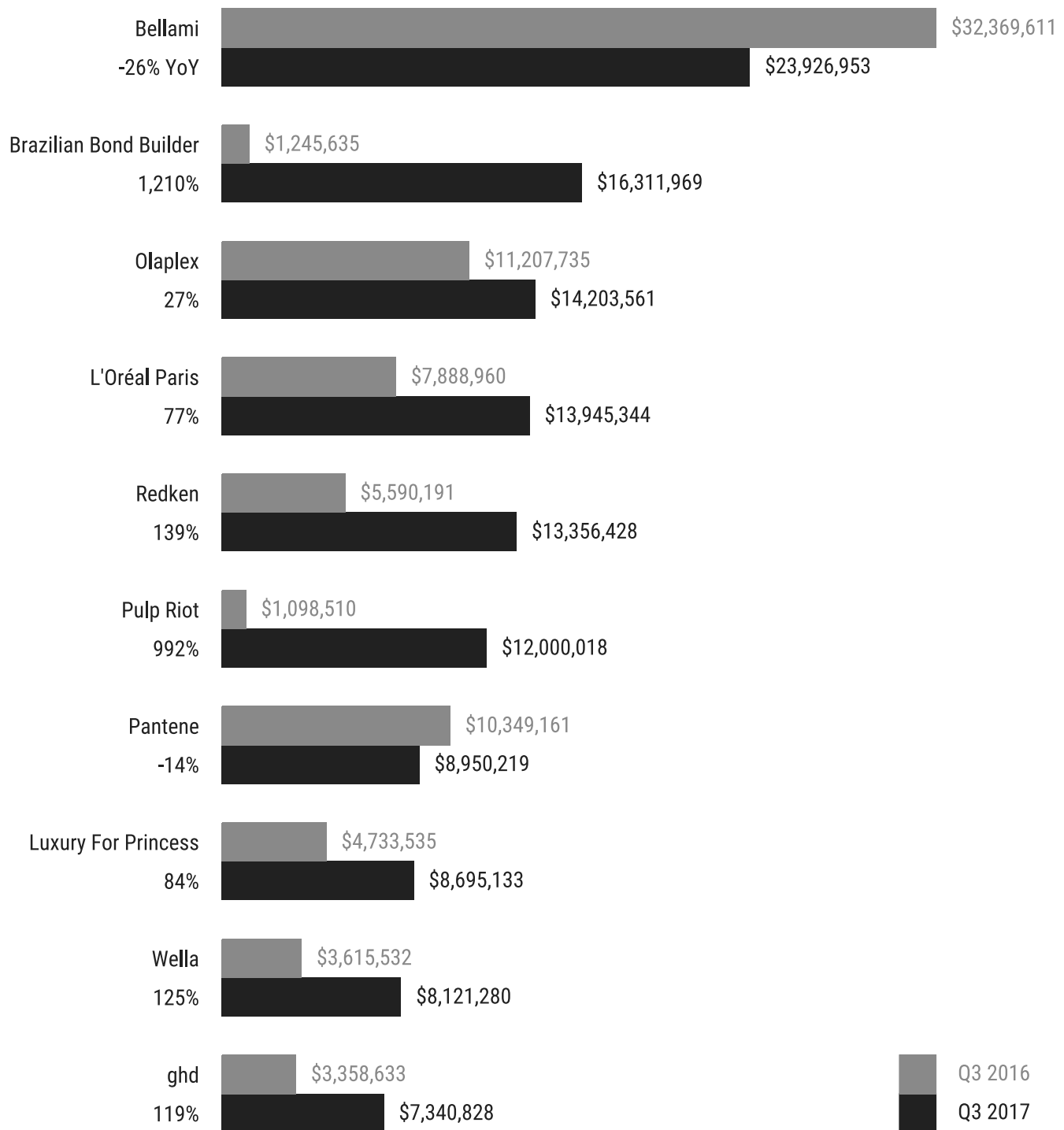
*When you get into your forties, using rosehip oil is really kind of great. I use the [100% Organic Cold-Pressed Rose Hip Seed Oil] almost every night.*

— Elle Leary

## EMV Leaderboard Highlights

- 1.** L'Oréal Paris launched its Colorista Washout semi-permanent hair color collection with an Instagram-worthy event at LA's Sunset Car Wash, where influencers posed with vintage cars and bounced on a glitter-covered trampoline. #Colorista drove \$1.8M EMV.
- 2.** Redken hosted its "Next Big Thing" Instagram contest for aspiring hairstylists. The brand also brought bloggers to Beautycon LA and NYFW, where they flaunted their #RedkenReady (\$1.9M EMV) hairstyles.
- 3.** In honor of Pantene's #FightHairAsthma (\$229.4K EMV) campaign, ambassadors hosted an Instagram contest inviting fans to compete for products and passes to an exclusive influencer meet-and-greet in Manila, the Philippines. The associated hashtag, #MakeTheBigSwitchToday, generated \$577.6K EMV.

## Top 10 Haircare EMV





Rising Brand:

# Curls

## Empowers Women of Color With Bahamas Initiative

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*The brand brought its “Curlista” squad to the Bahamas, where influencers volunteered at a school and celebrated female and black empowerment.*

Curls collected \$3.4M EMV in Q3, achieving impressive quarter-over-quarter and year-over-year growths of 226% and 209%, respectively. The natural hair brand successfully demonstrated its commitment to the curly-haired community through numerous influencer engagements. In July, Curls set up camp at the Curly Girl Collective’s 2017 CurlFest, an expansive outdoor celebration dedicated to empowering the natural hair community with the help of multiple beauty brands and fashion vendors. Curls invited smaller-scale influencers like Amber Janielle (@amberjanielle, 52.2K followers) and Kathlyn Celeste (@kathxlynnn, 111.9K followers) to its luau-themed tent, where the bloggers Instagrammed themselves dressed in festive leis, live-streamed the brand’s limbo contest, and welcomed their followers to come and meet them. Amber wrote that she was “so excited to be repping my favorite brand @frizzfreecurls

at #curlfest2017! ... I can’t wait to reunite with the Curls of my dreams!!,” and urged her fans to join her at the festival. Amber and Kathlyn drove a respective \$93.9K and \$135.5K EMV for Curls, while mentions of #CurlFest drove \$42.7K.

Curls’ largest Q3 initiative by far, however, was the brand’s #curlsinthebahamas influencer trip in August. Part vacation, part empowerment event for women of color, #curlsinthebahamas gave over 15 “Curlistas” the opportunity to relax on the beach together, visit a local school, and put the brand’s styling products to the test. Bloggers including Amber Janielle, Kathlyn Celeste, Alyssa (@foreverflawlyss on Instagram), and Jadah Bird (@jadahdoll) documented their island experiences while flaunting beautifully coiffed hairstyles on Instagram. The resulting photos not only emphasized the quality of products like the new Blueberry Bliss Triple Threat set, but



“

*So excited to be repping my favorite brand @frizzfreecurls at #curlfest2017! ... I can’t wait to reunite with the Curls of my dreams!!*

— Amber Janielle

also celebrated the solidarity of the brand's community. Posing with the rest of the Curls influencers in a commanding beachside formation, Alyssa thanked the brand for the chance to "be around a group of girls who support one another." Jadah Instagrammed her experience helping Bahamian students create vision boards at the Carmichael Primary School, and wrote that she felt "so blessed to meet these gorgeous Bahamian locals. These young women are so full of light, passion, intelligence, beauty, and MELANIN, baby! ... I met future chemists, doctors, and so many more." #Curlsinthebahamas garnered an impressive \$1.6M EMV—over 45% of Curls' Q3 total—and proved to be a powerful expression of the brand's values and commitment to the community.



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**24.5K Likes | 102 Comments**  
@foreverflawlyss via Instagram

“

*I felt so blessed to meet these gorgeous Bahamian locals. These young women are so full of light, passion, intelligence, beauty, and MELANIN baby!*

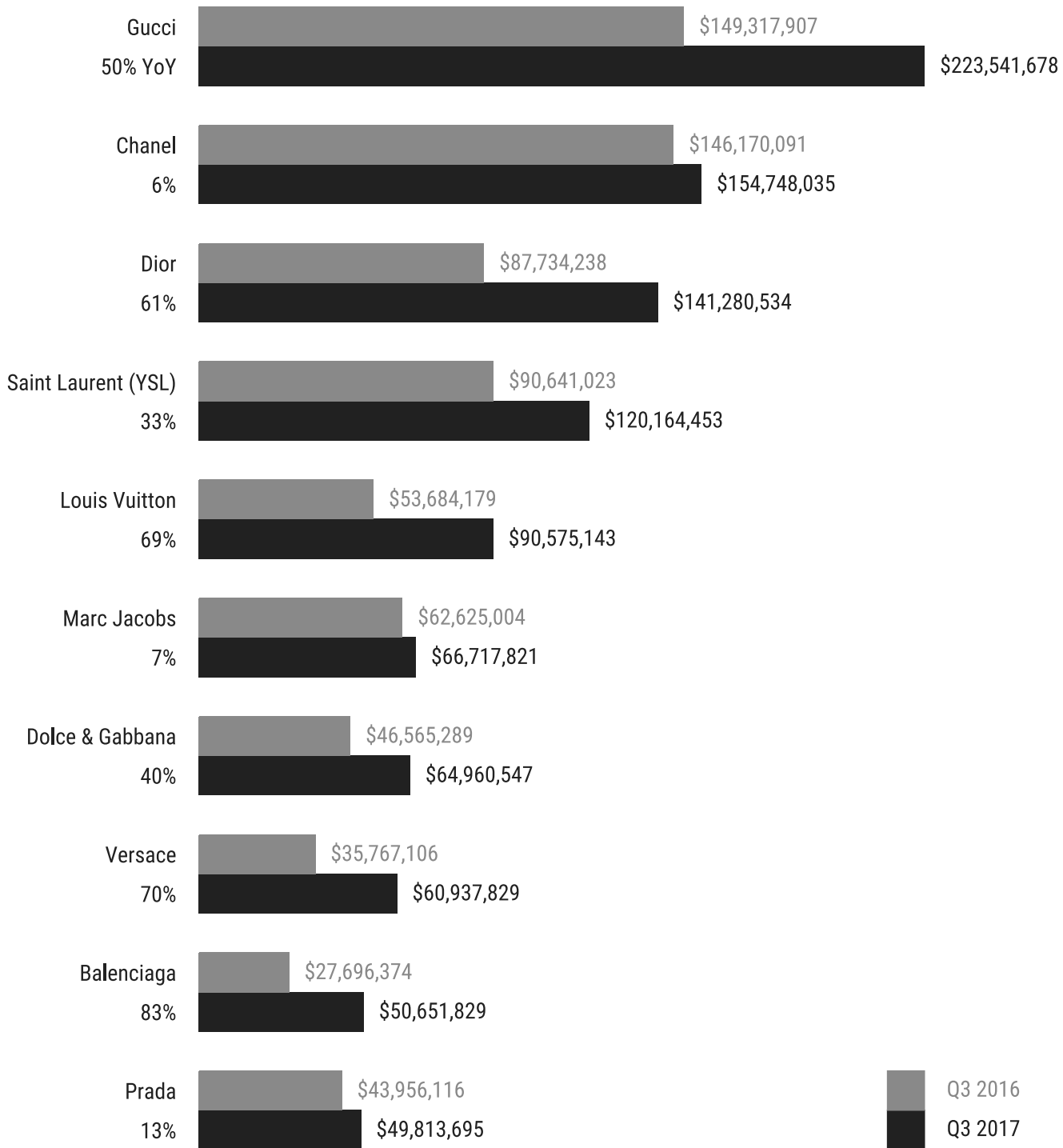
— Jadah Bird



# TRIBE TOP 10 | FASHION

Q3 2017

# Luxury



Note: Figures for each luxury brand comprise the sum of the brand's verticals.

# Notes on the Top 10

Luxury

## Gucci Goes With Streetwear Aesthetic

Gucci led luxury with \$223.5M EMV in Q3, posting solid 35% quarter-over-quarter and 50% year-over-year increases. Powerhouse beauty vlogger Jeffree Star (YouTube's jeffreestarc, 5.4M subscribers) tagged the label in 25 posts, single-handedly contributing \$2.5M EMV as its No. 2 ambassador, after advertising platform We All Love Fings (Instagram's @walf). Gucci also featured frequently alongside streetwear brands such as Supreme and Yeezy in influencer content, with #supreme and #yeezy driving a respective \$4.2M and \$4.9M EMV for the luxury label in Q3. Other top-earning hashtags included #streetstyle (\$5.5M EMV) and #hypebeast (\$4.5M), powered heavily by streetwear publications like Highsnobiety (@highsnobiety) and Hyped Streets (@hypedstreets). Along with Hypebeast (@hypebeast) and its women's division, Hypebae (@hypebae), these outlets collectively generated \$4.7M EMV for Gucci across 308 posts.

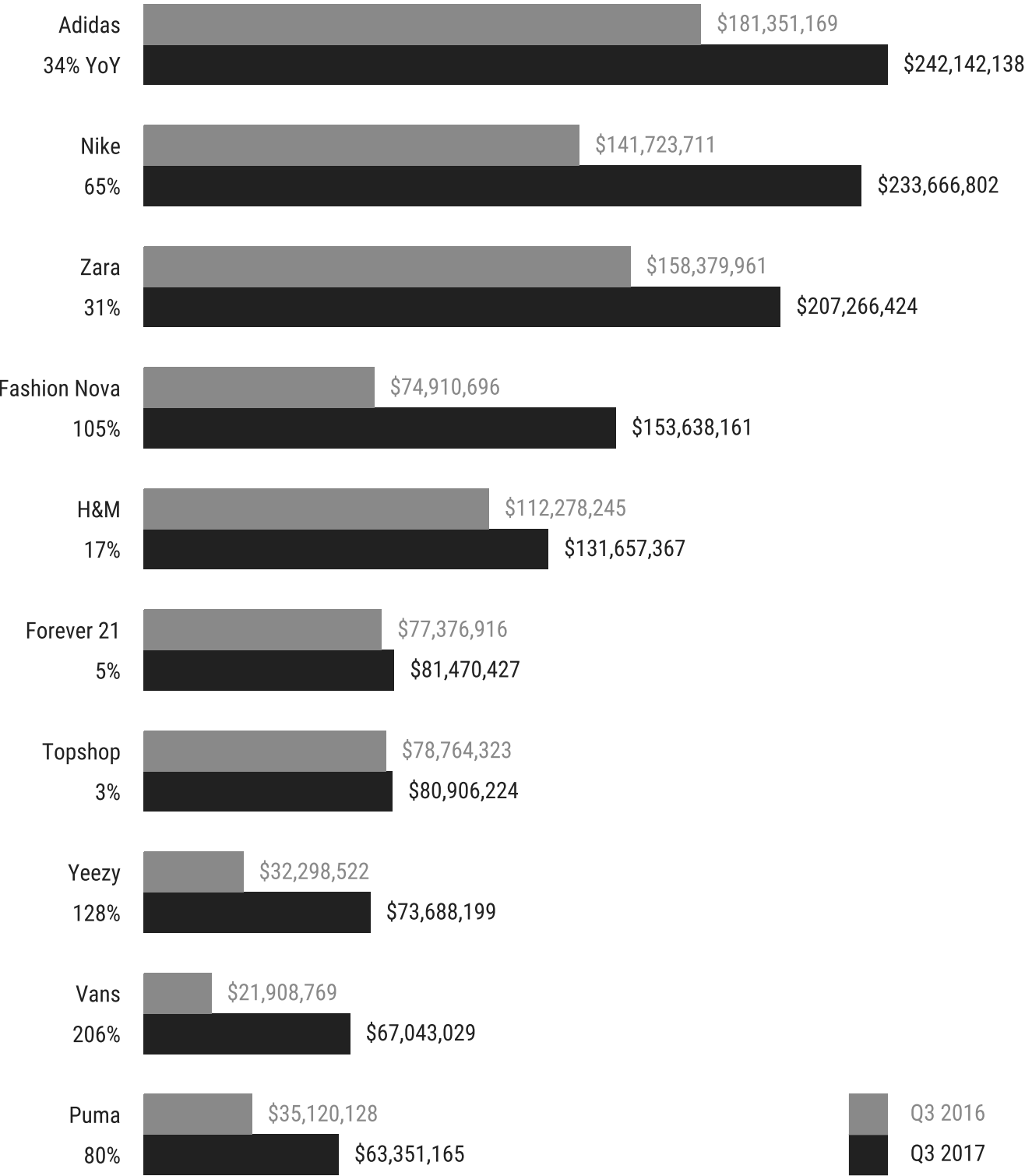
## Louis Vuitton Generates Buzz With Supreme Collaboration

Q3 saw the launch of Louis Vuitton's ultra-hyped collaboration with streetwear powerhouse Supreme. The eye-catching #LVxSupreme (\$2.3M EMV) collection garnered praise from celebrities and influencers alike, including superstar Lady Gaga (@ladygaga on Instagram, 26.2M followers) and popular beauty guru Jeffree Star (@jeffreestarc, 5.2M followers). Lady Gaga featured Louis Vuitton x Supreme apparel and luggage in an Instagram (\$157.7K EMV), while Jeffree shared photos of himself and his boyfriend wearing pieces from the collection, ultimately driving \$2.1M across 37 posts. After #louisvuitton (\$18.8M EMV) and #ootd (\$7.0M), #supreme netted \$6.8M for the brand as its No. 3 hashtag in Q3. Louis Vuitton closed the quarter with a total of \$90.6M EMV.



639.6K Likes | 5.5K Comments  
@ladygaga via Instagram

# Non-Luxury Apparel





# Notes on the Top 10

## Non-Luxury Apparel

### Fashion Nova Enjoys Organic Endorsements

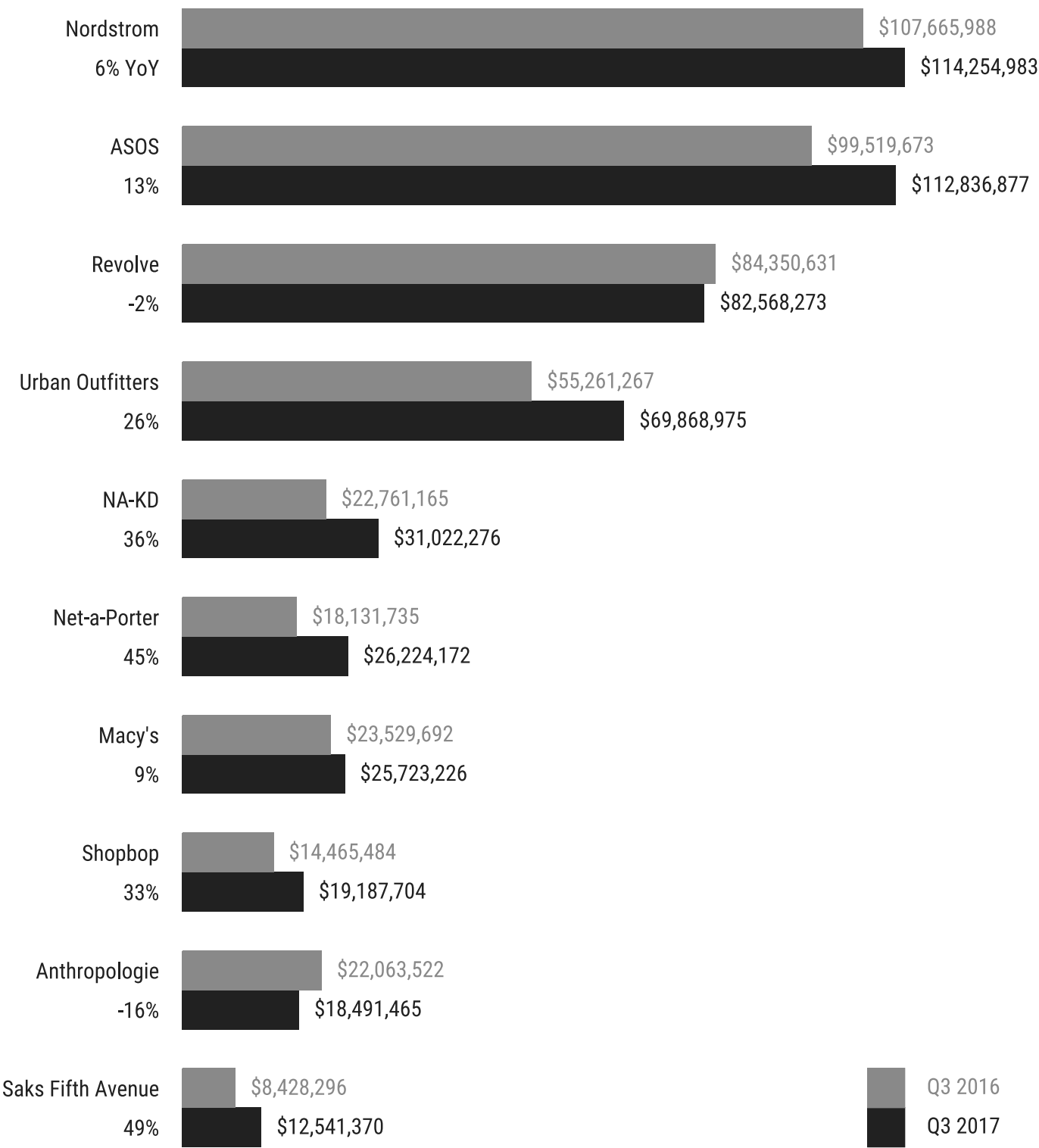
Fashion Nova enjoyed 54% quarter-over-quarter and 105% year-over-year growths in Q3, yielding a total of \$153.6M EMV. The brand benefited from both organic endorsements and partnerships with trending social media stars, including internet personality Danielle Bregoli (@bhadbhabie on Instagram, 11.7M followers). Bregoli promoted Fashion Nova in three of its top-earning posts for the quarter (\$459.8K EMV). Additionally, the brand received recognition from a diverse set of influencers, including model Iskra Lawrence (@iskra) and octogenarian Instagram star Helen Van Winkle (@baddiewinkle, 3.3M followers), who wore a Fashion Nova dress in an Instagram commemorating her 89th birthday. Lawrence and Helen collected a respective \$1.5M and \$196.6K EMV for the brand in Q3.

### Nike Air Society Hosts Influencers at Beautycon LA

Nike netted \$233.7M EMV in Q3, ranking as the No. 2 non-luxury apparel brand. In August, Nike collaborated with a range of influencers on its Air Society pop-up lounge at the Beautycon LA festival, where it hosted talks, manicures, and live demonstrations. Makeup artist Felicia La Tour (Instagram's @felicialatour) performed a makeup tutorial on brand ambassador and gymnast Laurie Hernandez (@lauriehernandez\_), while Alyssa (@foreverflawlyss) curated outfits to complement Nike's Air Max 97 sneakers in the display windows of the lounge. Alyssa called her Beautycon experience with Nike "a dream come true," sharing that she was thrilled to have spent the weekend with her "amazing" fellow brand ambassadors. Sisters Chloe and Halle Bailey of R&B duo Chloe x Halle (@chloexhalle) also performed at the lounge, where they unveiled their custom-designed Nike Air shoes. Mentions of "beautycon" in conjunction with Nike generated \$819.9K EMV.



# Third-Party Retailers





# Notes on the Top 10

## Third-Party Retailers

### Revolve Invites Influencers to the Hamptons

Revolve powered \$82.6M EMV in Q3, largely bolstered by its annual #REVOLVEintheHamptons (\$28.4M) retreat series. Each weekend of July, the retailer invited a different influencer squad to a luxurious mansion in the Hamptons, New York. Revolve provided bonding time for its brand family with Instagram-worthy dinners and parties, as well as exclusive brand experiences like private backyard concerts. The attendees posted prolific content about each weekend, upholding brand getaways as prime opportunities for content creation: The retailer's top five EMV-driving ambassadors, Camila Coelho (Instagram's @camilacoelho), Julie Sariñana (@sincerelyjules), Yovanna Ventura (@yoventura), Tess Christine (@tesschristinexo), and Claudia Sulewski (@claudiasulewski), each created 28 posts on average, netting a combined \$7.4M EMV.

### Anthropologie Honors Influencer Backgrounds With #50StatesOfDenim

Anthropologie generated \$18.5M EMV in Q3, enjoying a 21% quarter-over-quarter growth despite a 16% year-over-year decline. For its August #50StatesofDenim (\$302.4K EMV) campaign, the retailer selected 50 fashion bloggers to style an Anthropologie denim outfit in a way that represented their home state. Participating influencers, including Brooklyn Dombroski (Instagram's @brooklynhawaii) and Allegra Berger (@allegraroseb), paired their looks with captions describing what their hometowns meant to them. In an Instagram of her outfit, Lacey Rogers (@thelaceyclaire) wrote: "Some people may try to hide their roots, their upbringing. ... I'm from Arkansas, and my roots made me who I am today." While some of this content was tagged #sponsored (\$266.7K EMV) or #ad (\$406.0K), many influencers expressed genuine gratitude to Anthropologie for spurring the activation and used the campaign as an opportunity to open up to their followers.



6.9K Likes | 37 Comments

@brooklynhawaii via Instagram



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