

# LA MODE Fashion

Q2 2016: THIRD-PARTY RETAILERS



TRIBE DYNAMICS

# Contents

## **2 EARNED MEDIA VALUE**

---

- Top 10 Retailers by EMV
- 3 EMV Performance by Channel
- 6 Trending EMV Performance

## **7 WORD CLOUDS**

---

## **9 BRANDSCAPE**

---

## **10 TOP INFLUENCERS BY RETAILER**

---

## **13 ANALYSIS**

---

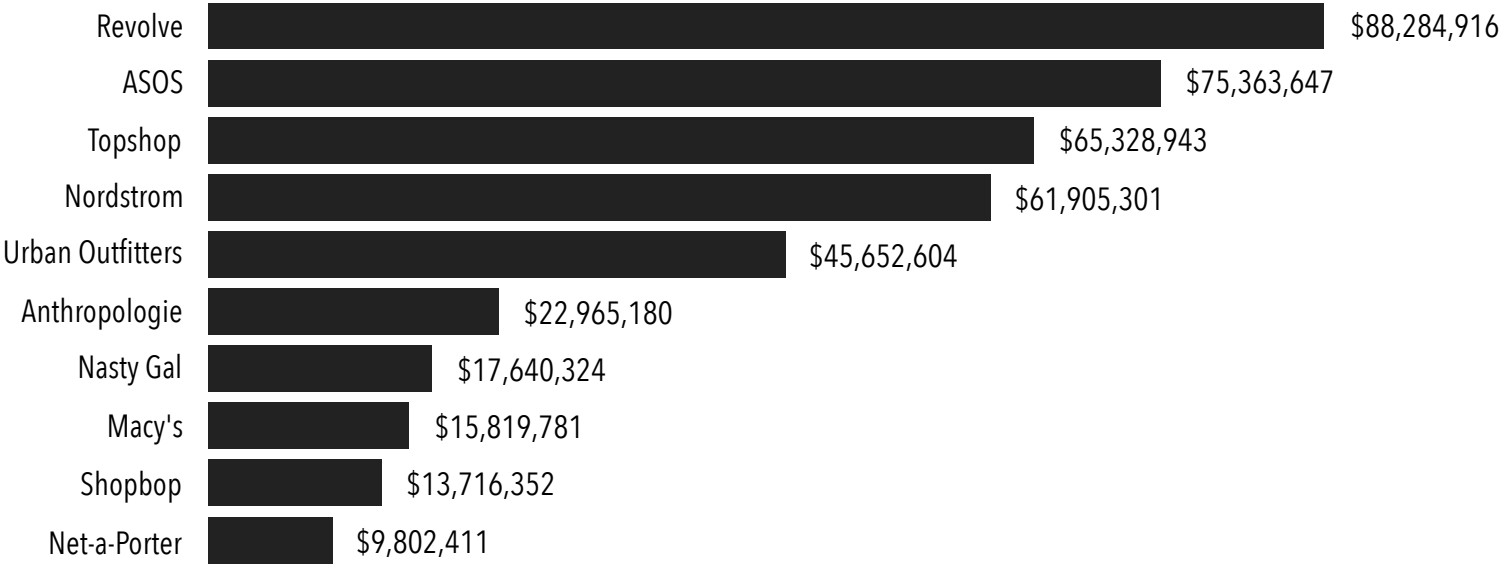
- Notes on the Top Ten
- 14 Revolve

# Earned Media Value

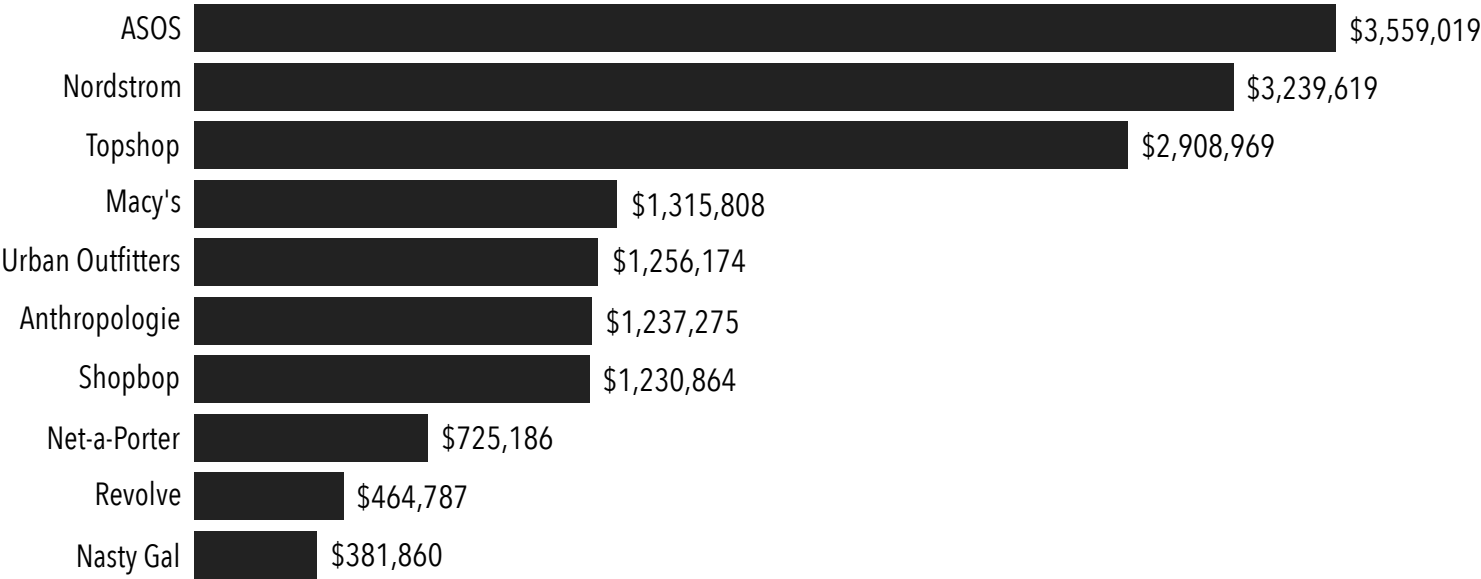
Earned Media Value (EMV) is Tribe Dynamics’ prescribed metric that quantifies the estimated value of publicity gained through digital earned media and its respective engagement levels. Our holistic approach assigns a specific dollar value to each piece of content, based on the publishing channel’s perceived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

In an effort to ensure that we are always providing the most insightful data and analysis to help you better understand the latest digital trends, we consistently improve our measurement of earned media performance. As we continue to advance our own understanding of earned media and learn about the industry, we will update our analytics to reflect new knowledge and innovations.

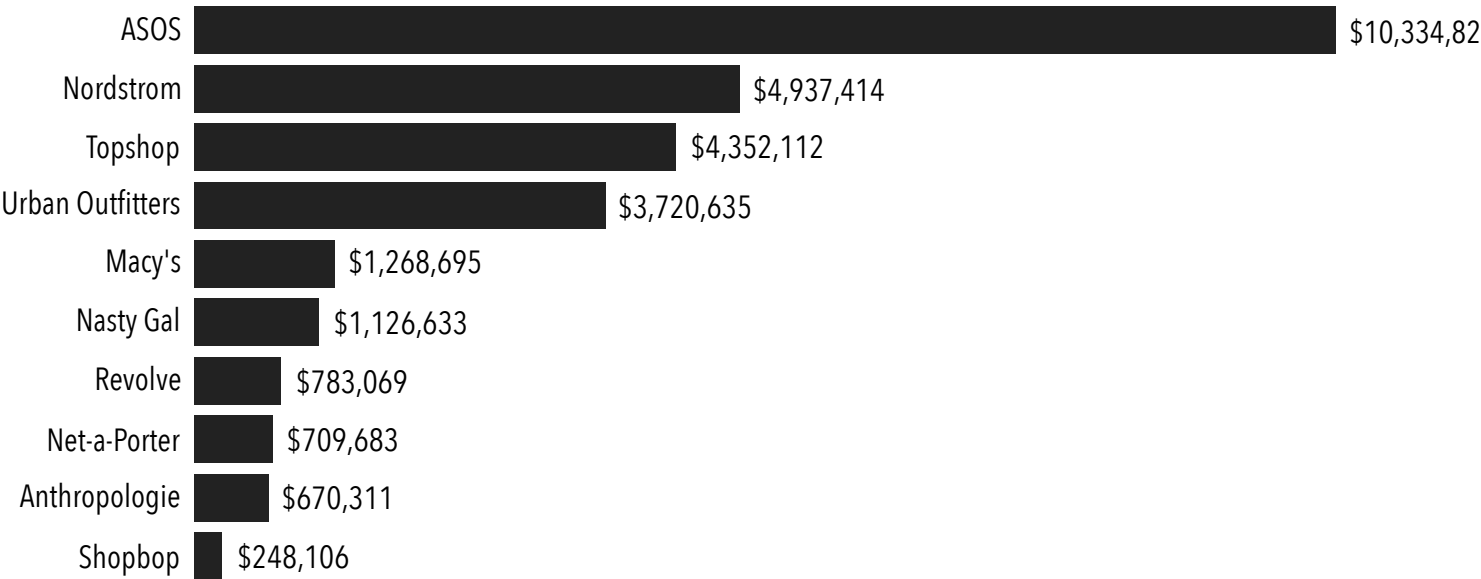
## TOP 10 RETAILERS BY EMV



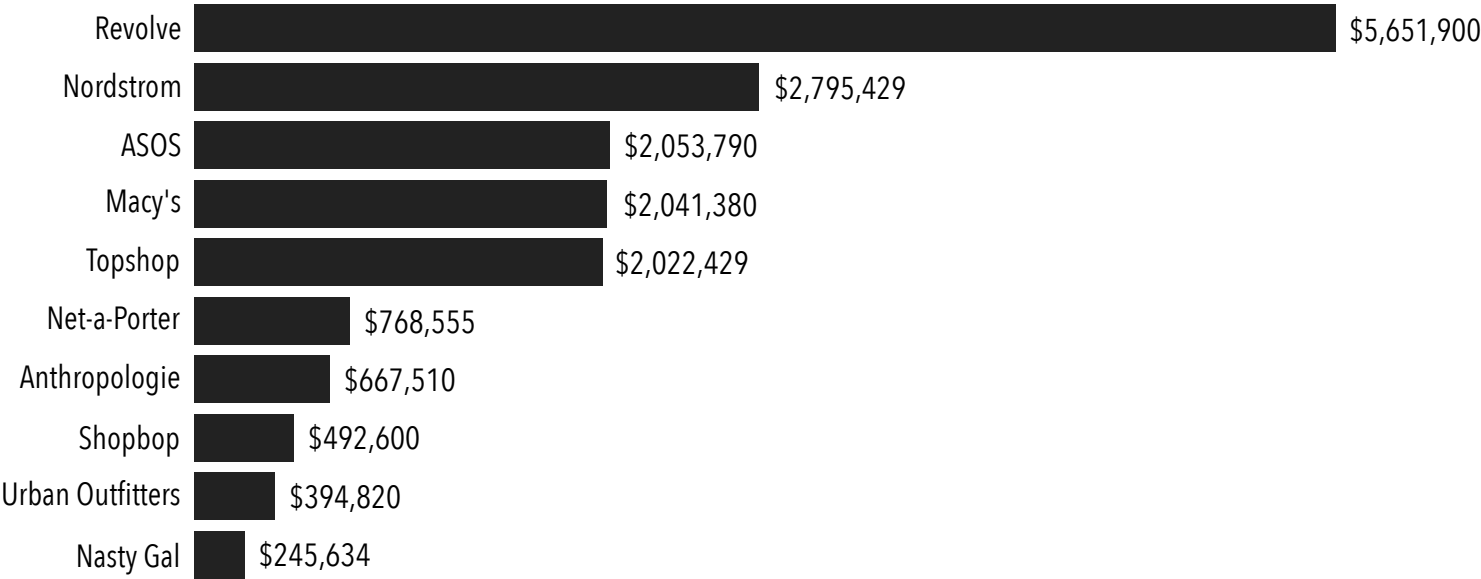
BLOG



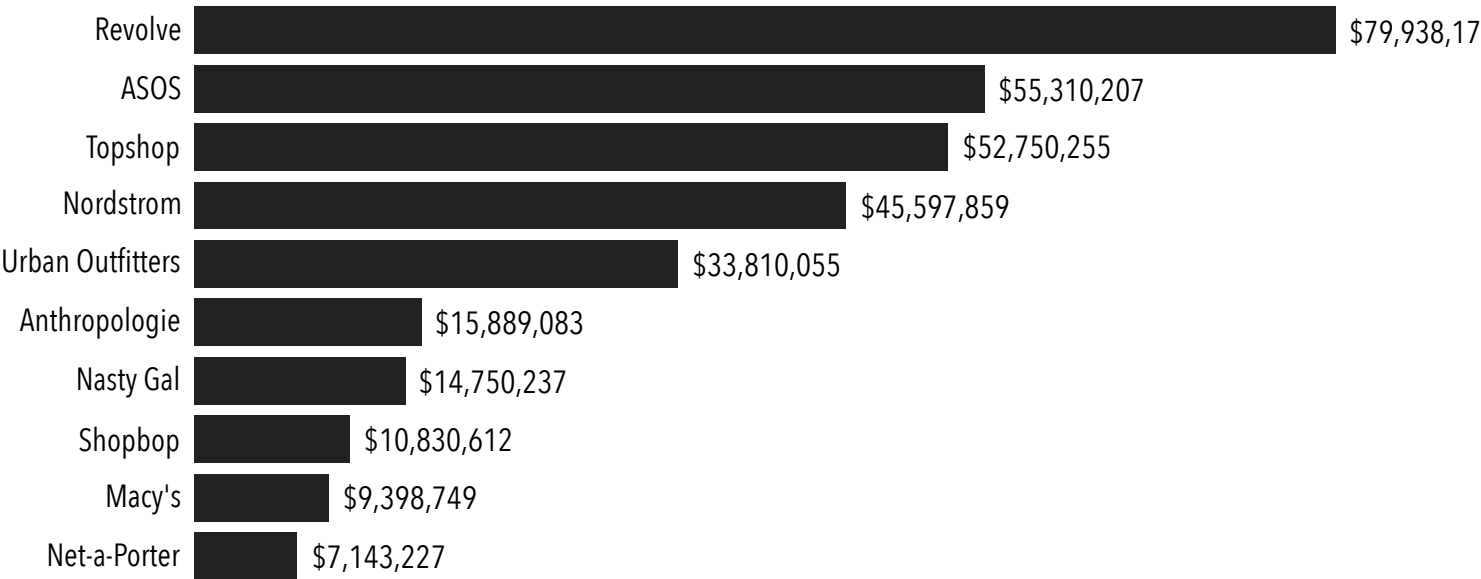
YOUTUBE



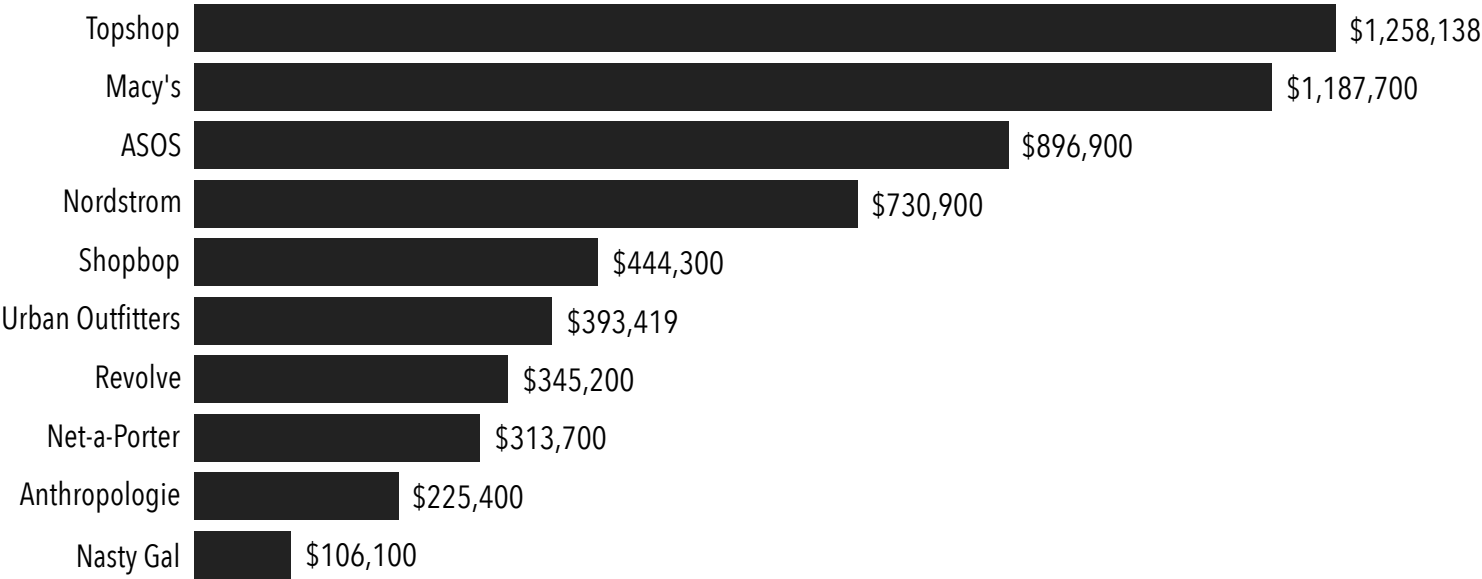
FACEBOOK



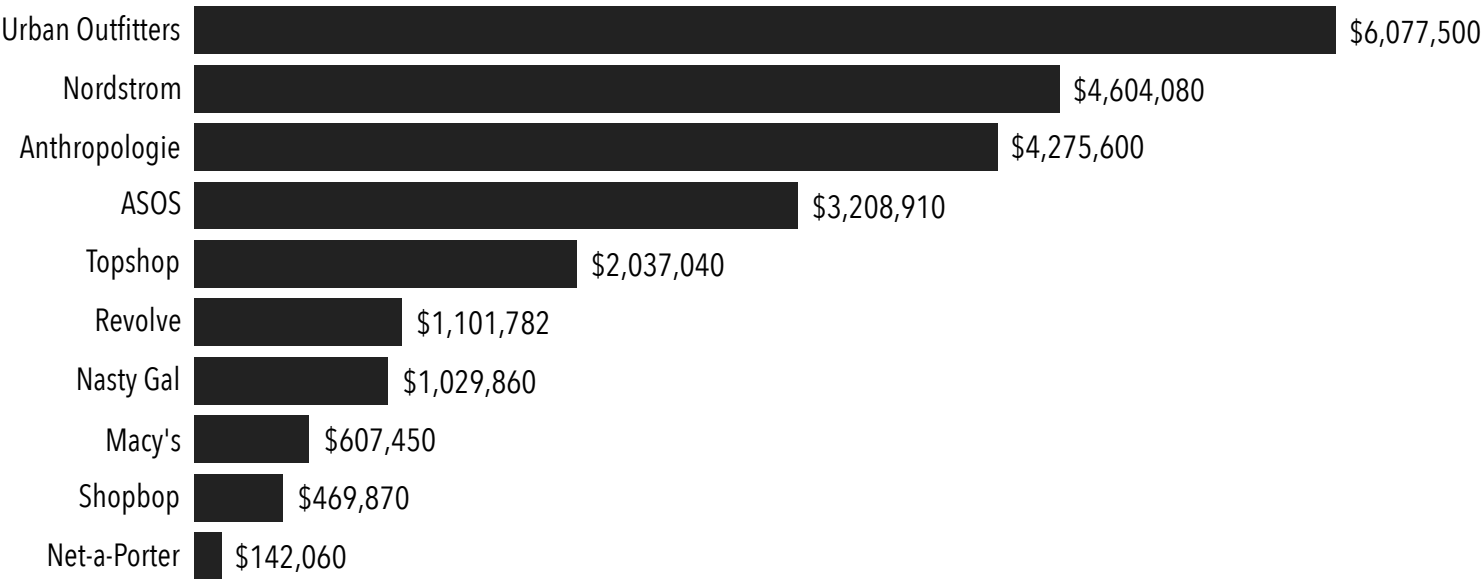
INSTAGRAM



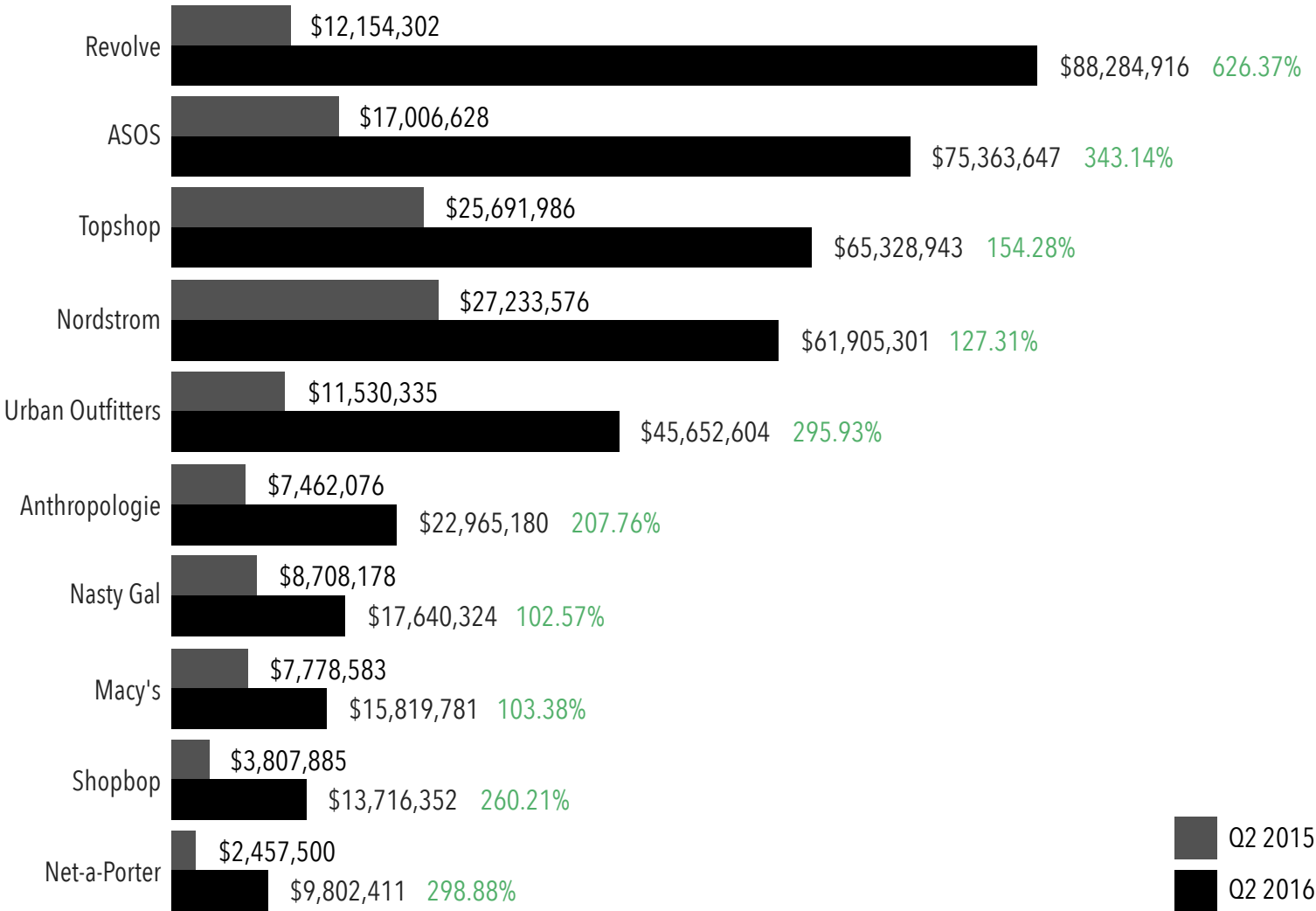
TWITTER



PINTEREST



YEAR OVER YEAR GROWTH IN EMV







## URBAN OUTFITTERS

music watching vlog media free people forever discover home beach uoonyou yahoo social forever21 vscotumblr channel westelm

## ANTHROPOLOGIE

profile room flowers share today little morning day living notes katespadeny space beautiful home pretty bed even love glass west elm blog tea things anthro durham happy table kitchen cushions

## NASTY GAL

shoes 2 fashion choker music bad gal dope 1 sunglasses jacket the curvy fashionista

## MACY'S

macys love sephora check last full take gift family way stores john years always see macy pick show everyone win thalia sponsored may fashion love work watch time collection square brow back book elton goes palette make thank

## SHOPBOP

outfit lookbook best details like to know today street style luxe look today blog like to kit dress ootd magazine now inspo cafe family itsale alert the real outfit shop picks code link friends

## NET-A-PORTER

available 170qouuccodionys collaboration elite special chloe capsule exclusive story of mail life bjorniooss collection edmondalison chloegirls ttstyle gask dolce canadian gucci i paris inspo cafe chris colls cover makeup artist marandahair pink kingdom mabelisa gregory russell hair accent gucci for net a porter alessandro michele iro set mallorca emily fox snaps david belle mere alexander gold demo london got purchased gemmastark belms french questions creative lip fox sites 70d ohimallorca katehouse portermagazine the fashion gular silk

The following network shows how online conversations group brands together. Each node (circle) represents a brand and is sized relative to the EMV associated with that brand. Lines between nodes are drawn when two brands are mentioned in the same posts. The thickness of the line depends on the relative EMV of posts that mention both brands. Nodes that are closer together and connected by thick lines are strongly associated. Mathematically detected clusters discovered in the data are represented by different colors and connote what influencers perceive as larger brand groupings.

The graph illustrates a complex network of relationships between various retail brands. The nodes, representing brands, are sized and shaded to indicate their relative importance or volume. The connections, represented by lines, show the relationships between these brands. The network is highly interconnected, with many brands having multiple connections. The brands included are: Opening Ceremony, Urban Outfitters, Topshop, ASOS, Nordstrom, Anthropologie, TJMaxx, Macy's, Bloomingdale's, Neiman Marcus, Saks, Shopbop, Net-a-Porter, Luisa Via Roma, Nasty Gal, Revolve, Matches, FWRD by Elyse Walker, The Outnet, Yoox, Farfetch, Barneys, Bergdorf Goodman, Mod Operandi, Gilt, Intermix, Pixie Market, Aritzia, and LF.

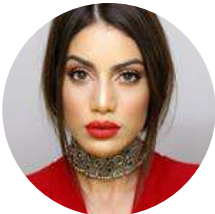
# Top Influencers

An influencer’s EMV represents the EMV the influencer generated for the brand on all of their active channels in Q2. The percentage displayed represents the influencer’s contribution to the brand’s total EMV.

## REVOLVE \$88,284,916 EMV



tashoakley  
\$5,460,791  
6.19% of total EMV



camilacoelho  
\$5,256,017  
5.95%



chiarabiasi  
\$3,389,303  
3.84%

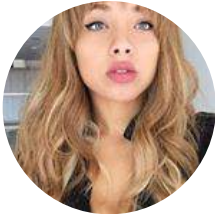


thassianaves  
\$2,898,661  
3.28%

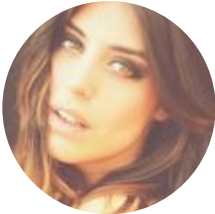


sincerelyjules  
\$2,847,489  
3.23%

## ASOS \$75,363,647 EMV



samanthamariaofficial  
\$3,719,534  
4.94%



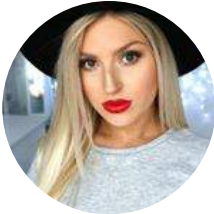
dulceida  
\$2,484,947  
3.30%



thriftsandthreads  
\$1,701,020  
2.26%

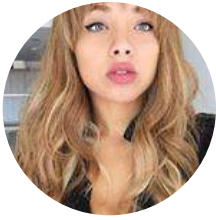


tesschristinexo  
\$1,663,574  
2.21%



Shaaanxo  
\$1,589,990  
2.11%

## TOPSHOP \$65,328,943 EMV



samanthamariaofficial  
\$2,246,476  
3.44%



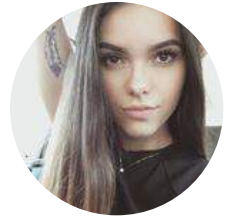
Nordstrom  
\$1,911,830  
2.93%



thriftsandthreads  
\$1,838,470  
2.81%



tesschristinexo  
\$1,359,955  
2.08%

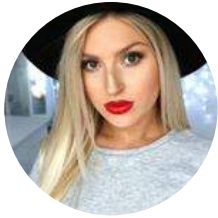


teresuch  
\$1,299,530  
1.99%

## NORDSTROM \$61,905,301 EMV



rachparcell  
\$4,170,193  
6.74%



Shaaanxo  
\$3,616,103  
5.84%



blaireadiebee  
\$1,134,140  
1.83%



Ivanka Trump  
\$1,069,425  
1.73%



hellofashionblog  
\$961,820  
1.55%

## URBAN OUTFITTERS \$45,652,604 EMV



prettittlefawn  
\$1,602,295  
3.51%



newdarlings  
\$1,194,910  
2.62%



tesschristinexo  
\$1,023,594  
2.24%



KathleenLights  
\$983,398  
2.15%



thepinkdiary  
\$968,615  
2.12%

## ANTHROPOLOGIE \$22,965,180 EMV



Sweetie Pie Style  
\$698,560  
3.04%



livingnotes  
\$669,028  
2.91%



rachparcell  
\$535,933  
2.33%



conveythemoment  
\$507,740  
2.21%



juliahengel  
\$374,636  
1.63%



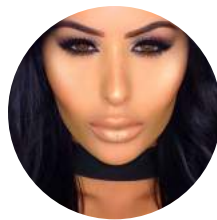
## NASTY GAL \$17,640,324 EMV



hellyluv  
\$688,570  
3.90%



luanna90  
\$674,048  
3.82%



amrezy  
\$661,883  
3.75%



alexcentomo  
\$652,769  
3.70%

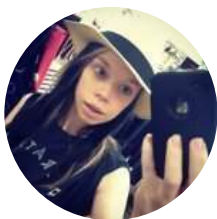


iamkareno  
\$556,384  
3.15%

## MACY'S \$15,819,781 EMV



Heidi Klum  
\$522,047  
3.30%



grav3yardgirl  
\$502,155  
3.17%



mariale  
\$306,320  
1.94%



merrelltwins  
\$274,712  
1.74%



hellofashionblog  
\$273,543  
1.73%

## SHOPBOP \$13,716,352 EMV



chloe\_t  
\$595,020  
4.34%



Variety Magazine  
\$424,515  
3.09%



lioninthewild  
\$408,270  
2.98%



ascia\_akf  
\$379,045  
2.76%



jenniferlake  
\$353,555  
2.58%

## NET-A-PORTER \$9,802,411 EMV



Anja Rubik  
\$759,975  
7.75%



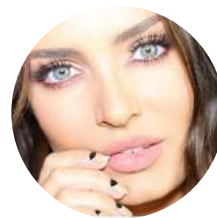
Alessandra Ambrosio  
\$735,730  
7.51%



Chloe Moretz  
\$570,951  
5.82%



ohhcouture  
\$471,520  
4.81%



Chloe Morello  
\$268,090  
2.73%

# Notes on the Top Ten

## Macy's Benefits from Influencer Partnerships

In Q2, Macy's partnered with YouTubers Meredith Foster and Krazyrayray to create sponsored videos. Krazyrayray's video featured the Thalia Sodi collection, which was tagged #mythaliasodilook. The #mythaliasodilook hashtag generated \$617.1K EMV. Macy's also hosted DJ Ruby Rose at its #getyourdenimon event at the brand's San Francisco Union Square location, generating \$183.4K EMV. The brand experienced a spike in EMV thanks to influencer grav3yardgirl, whose promotion of her Tarte collaboration palette benefitted the retailer to the tune of \$502.1K EMV.

## Retailers to Watch

Luisa Via Roma (rank 11) and Aritzia (14) just missed the top ten in Q2, but show promise with strong year-over-year growths --- 220% and 387%, respectively. Luisa Via Roma sent influencers, including luanna90, amberfillerup, neginmirsaleh, and louiseroe, to Florence, Italy, where they were treated to a welcome dinner and participated in photo shoots around the city. However, the content was limited to individual, professional-grade images, which did little to foster a sense of community. The influencers tagged most of the content #firenze4ever, driving \$2.2M EMV. Luisa Via Roma also hosted an event in Dallas at the RewardStyle convention and created



sponsored content with fashion blogger somethingnavy.

Aritzia benefitted from loyal influencers who organically adopted the brand's collection-specific hashtags, #nowhereeverywhere (\$138.5K EMV) and #escapecreate (\$364.8K EMV). Influencer alyssa.lenore created a phone case inspired by the latter campaign, emblazoned with the words "escape to create." Her consistent inclusion of the brand in Instagram OOTD (Outfit of the Day) posts drove \$205.1K EMV over the quarter. Aritzia also sent influencer bethanymarieco to Coachella in April. In return, the influencer drove \$329.4K EMV in Q2.

Amberfillerup Instagrams a sweet photo of her and her daughter in Florence, inspiring 82.3K likes.



# Revolve



Rocky\_barnes posts a "squad pic" from Revolve's Jamaica getaway, netting 19.4K likes

In April, Revolve posted an impressive \$49.4M EMV, more than tripling its March \$14.3M total. This significant spike contributed to the brand's dominant Q2 performance (\$88.3M EMV), achieving 152% quarter-over-quarter and 626% year-over-year growths. Though dramatic, this explosive

growth represents not an anomaly, but a culmination of Revolve's consistent investment in creating compelling brand experiences. Highlights from the brand's memorable influencer engagement in 2015 included a weekend in the Revolve Hamptons house, a Croatian getaway, the Revolve Winter Formal, and New Year's Eve in Mexico. Continuing its prowess in Q2 2016, Revolve executed over 10 influencer-focused brand experiences. The brand christened its newly-launched Revolve Social Club (an invite-only retail and event space) in LA with a rooftop bash, followed by parties for Grlfrnd Denim, House of Harlow, and For Love and Lemons. Revolve also sent influencers on adventures to Hawaii, Jamaica, Shanghai, and Capri.

## Quality Meets Quantity

In addition to this sheer quantity of influencer engagement initiatives, Revolve was meticulous in crafting each experience to reinforce its brand identity. Every detail lent itself to compelling visual content, including life-size flower arrangements spelling out the brand's name, specially designed tabletops at welcome dinners, and the impeccable aesthetics of the Social Club itself. During a private shopping session, influencer iamamypham snapped a selfie in front of the brand's gold, marble-print wallpaper, shared with the caption, "The world's most





Camilacoehlo poses with her "Revolve babes" at Coachella, generating 49.7K likes.

Instagrammable bathroom." By creating environments that are inherently on-brand and photogenic, Revolve need not give brand directives for content creation; instead, it can inspire brand-specific posts without limiting an influencer's creative agency.

Revolve designs each brand experience to make the influencer feel personally loved, valued, and

part of a community. Its astronomical success relies upon the brand's continuous commitment to forging lasting relationships with its influencers. The brand rarely engages an influencer once, instead maintaining multiple touch points with each influencer in its family to cultivate genuine care and intimacy. For example, leading up to Coachella, the brand planned an unforgettable week of pampering and community building for its guests. Revolve invited influencers to L.A. for a lavish welcome dinner on its Social Club rooftop, provided private pre-festival shopping opportunities, and hosted a VIP event featuring the brand Grlfrnd Denim. Influencer attendees received Coachella-ready denim pieces custom embroidered with their names.

At the festival itself, the brand hosted influencers from afar in the Revolve house and threw multiple parties throughout the weekend. Attendees included a mix of influencers, some with whom the brand had already established relationships the previous year, and others newly invited. Revolve's veteran crew included aimeesong, neginmirsaleh, and sincerelyjules, who each drove a substantial chunk of the brand's EMV -- \$1.6M, \$1.5M, and \$2.8M EMV, respectively. Camila Coehlo, a newer addition to the Revolve family, created \$5.3M EMV over 69 posts during the week-long adventure. Overall, mentions of Coachella and Revolve drove \$20.0M EMV.





Tashoakley documents her dream Capri vacation, inspiring 29.2K likes.

## Inspiring Brand Loyalty

Revolve also leverages these events as opportunities to empower its ambassadors, giving influencers agency and ownership of the brand. In May, Revolve invited five influencers to participate in a swimwear collaboration. Tashoakley and rocky\_barnes, among several others, traveled to Jamaica with the brand to shoot their own swimsuit designs and vacation with their Revolve family. Unsurprisingly, pride in their work and love for the brand made these influencers the brand's top EMV generators.

Though they were ostensibly promoting a product, their content never read as transactional. The brand was not positioned as a

sponsored partner, but rather a genuine part of the influencers' friend group. By giving the influencers a chance to show off their swimwear in the context of an aspirational getaway, the focus was on the shared experience over the product itself.

Revolve also illustrated the importance of sustained, long-term friendships. Rocky\_barnes was both part of the brand's Coachella crew and an attendee of the House of Harlow x Revolve event. When it came to choosing a dress for her friend's engagement party later on in the quarter, Revolve was her natural first choice. Meanwhile, tashoakley took over the Revolve Instagram in June, taking her followers along on her Italian vacation. Rocky\_barnes



and tashoakley drove \$2.2M and \$5.5M EMV over 53 and 78 posts, respectively.

## Keeping Friends Close

The aspirational Revolve lifestyle is fundamentally shaped by friendship, and there is no better measure than the “squad pic.” Just following the close of this report’s data set, Revolve called a family reunion in the brand’s Hampton home. A snapshot of influencers crowded around a table in the Revolve house looks as genuine and warm as a family dinner -- the sort of palpable intimacy that cannot be staged.

It is because Revolve has invested in its influencers time and time again, demonstrating a commitment to earning real, sustained relationships. Some of these influencers have traveled to various parts of the world with the brand family multiple times over the past year. The brand has prioritized friendships through its brand experiences, and in an age where superficial branded content is exceedingly easy to identify, Revolve has set itself apart by cultivating a truly genuine sense of community among its influencers.



Revolve Instagrams a moment from its family dinner in the Hamptons, generating 6.6K likes.



ANALYSIS BY  
MERISSA REN, DEBORAH GHIM, GRACE CHAO & ALEX RAWITZ