



COVID-19 Influencer Marketing Impact Study & Tribe Top 10

March 2020 US Beauty, Fashion, & EMEA Beauty

Contents



03 How Has COVID-19 Impacted Influencer Marketing So Far?

- 03 Influencer Posting Habits
- 04 Audience Engagement Data
- 05 How Influencer Content Changed in March

08 US Cosmetics

- 08 Top 10 US Cosmetics Brands by EMV
- 09 Top 10: Community Metrics
- 10 Brand Highlights

11 US Skincare

- 11 Top 10 US Skincare Brands by EMV
- 12 Top 10: Community Metrics
- 13 Brand Highlights

14 US Haircare

- 14 Top 10 US Haircare Brands by EMV
- 15 Top 10: Community Metrics
- 16 Brand Highlights

17 UK Beauty

- 17 Top 10 Beauty Brands in the U.K. by EMV
- 18 Top 10: Community Metrics
- 19 Brand Highlights

20 France Beauty

- 20 Top 10 Beauty Brands in France by EMV
- 21 Top 10: Community Metrics
- 22 Brand Highlights

23 Luxury Fashion

- 23 Top 10 Luxury Fashion Brands by EMV
- 24 Top 10: Community Metrics
- 25 Brand Highlights

26 Apparel

- 26 Top 10 Apparel Brands by EMV
- 27 Top 10: Community Metrics
- 28 Brand Highlights

- 29 What Is EMV?

How Has COVID-19 Impacted Influencer Marketing So Far?



Since we began publishing our Tribe Top 10's in 2016, we've remained committed to providing our readers with detailed and data-backed coverage of the influencer marketing space in the U.S. and EMEA. In 2020, the COVID-19 crisis has impacted the global economic landscape in unprecedented ways, with much of the farthest-reaching effects being felt in March. As we've all individually experienced, social media has proven an immensely important tool in being able to connect and build community while at home. For these reasons, rather than continuing on with our typical Tribe Top 10 format, we combined our Beauty, EMEA, and Fashion TTT's into a single report to depict more broadly how social engagement across verticals and markets changed in March, and how influencers, brands, and audiences have begun to navigate and cope with our "new normal." The good news? Social media activity is only going up. So far, we've seen that influencers are posting *more* branded content on YouTube, while audiences have increased their engagement with content by commenting more on Instagram posts and YouTube videos.

Influencers Are Creating More YouTube Content, While IG Content Levels Vary

Across the markets we analyzed for this COVID-19 Influencer Marketing Impact Study (U.S., U.K., France, Italy, Spain), we saw a notable increase in branded YouTube videos in March in all countries except Spain. (Branded videos refer to influencer-created YouTube content that mentions one or more brands.) Additionally, within the U.S. verticals our Tribe Top 10's typically cover (cosmetics, skincare, haircare, luxury, and apparel), all except haircare saw an increase in branded YouTube content. In general, content creators are spending this stay-at-home period creating more YouTube content for their audiences. This is likely because YouTube's longer-form video content is viewed as closer to entertainment, akin to streaming sites like Netflix and Hulu, in contrast to the more varied applications Instagram has taken on during this time. In a qualitative analysis of the response of YouTubers to COVID-19, we saw creators consistently address feedback from their audiences that they use YouTube to "escape what is going on in the world," and our research confirms that influencers are responding to this increased need from their audiences by creating more content on YouTube.

Compared to YouTube, branded Instagram content creation rates proved a bit more variable across markets and verticals. In the U.S., there was a slight increase in beauty content creation that offset the decrease in fashion content, leading to a relatively consistent overall branded post count on Instagram in the U.S.—a pattern also seen in the U.K. and France. Meanwhile, Spain and Italy saw more pronounced drops in branded content on Instagram.



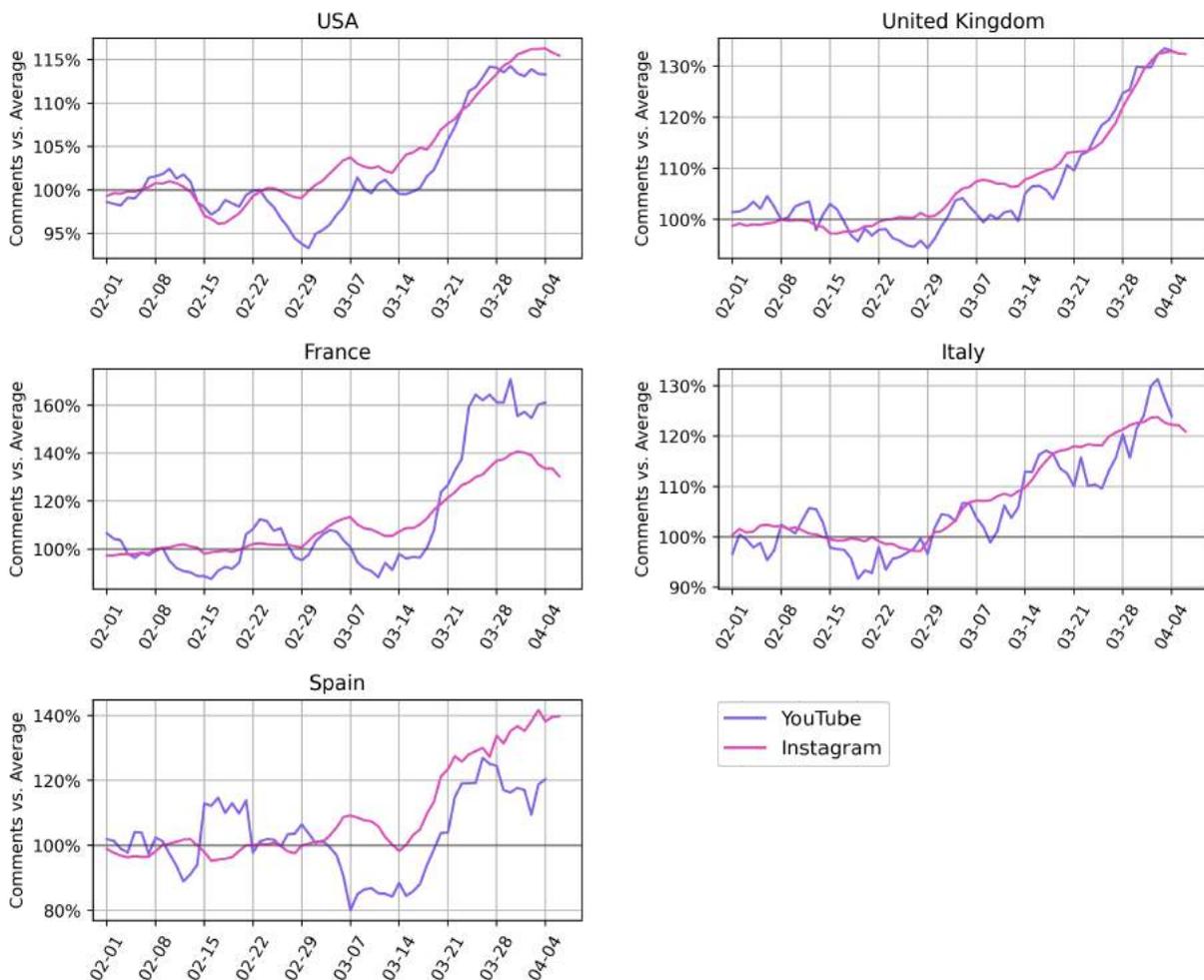


Audiences Are More Actively Engaging With Influencer Content

In the U.S., across all verticals and both branded and non-branded content, we saw an approximate 25% increase in Instagram video views and an approximate 10% jump in comments on influencers' Instagram and YouTube posts. In the U.K., France, Italy, and Spain, comments on influencers' Instagram posts were 20-30% higher than we would typically expect. Meanwhile, likes on influencers' Instagram and YouTube posts, typically seen as a more passive way of engaging on social media, remained relatively steady.

While a boost in views and comments could be partly an effect of increased free time among audiences undergoing social isolation, it also indicates that audiences are turning to their favorite content creators for not only entertainment, but also community and connection. Scrolling through YouTube, it doesn't take long to find a creator producing content about their COVID-19 experience and asking their viewers to share in the comments section their own experiences and ways of coping. Essentially, the trust and connection between influencers and their loyal followers that have built the foundation of the entire influencer marketing industry is proving more powerful than ever, and influencers and audiences alike are relying on these relationships to distract, escape, and cope.

Comments Per Branded Post, (February 1 - April 4)





How COVID-19 Impacted Influencer Content Across Verticals and Markets in March

Social media has long been a way for people to share their lives with followers, and as lives changed in March, so did social media content. In March, influencers adapted their content to fit into their own “new normal” and better meet the new needs of their followers, many of whom were working from home for the first time, cooking more than before, and in urgent need of some de-stressing self-care tips. In the following sections, we’ve outlined a few key ways that content in each of our Tribe Top 10 reporting verticals and markets changed in March.

US Beauty Goes Back to Basics and Focuses on Self Care at Home

Cosmetics: All of March’s top 10 EMV-driving cosmetics brands, and many more brands outside of the Top 10, posted month-over-month EMV gains. Though the uncertainty of the COVID-19 crisis disrupted many of the high-impact initiatives (in-person events, large-scale product sends, etc.) that often prompt content creation for cosmetics brands, with influencers stuck inside, makeup tutorials were on the rise throughout the month. Many makeup content creators addressed the crisis directly, either by referencing ways of spending time during quarantine or encouraging wellness and self-care, while others more broadly positioned themselves as sources of entertainment or communal connection.



Skincare: The month-over-month EMV surge was even more pronounced among skincare brands: the skincare vertical as a whole saw month-over-month increases across the board in EMV, community size, and post volume. In general, COVID-19 has influenced skincare content in that, now more than ever, influencers are promoting skincare as an important form of self-care. In March, bloggers acknowledged the stress and anxiety they—and their followers—were feeling, and shared their “quarantine skincare routines,” to help followers relax and pamper themselves, or combat the negative effects that stress (as well as staring at blue-light emitting screens all day) has had on their skin.



Haircare: COVID-19’s impact on the haircare vertical was more varied. Brands that performed strongly in March often saw increased activity surrounding hero products that could be easily utilized in at-home tutorials. While consumer brands benefited from a smoother adaptation to stay-at-home life under COVID-19, many salon brands posted month-over-month EMV declines, as salonist content aggregators and hairstylist brand partners began transitioning to at-home content. Additionally, similar to skincare, haircare as self-care emerged as a common content trend in March, with many influencers positioning hair tutorials not only as fun, skill-building diversions during quarantine, but as an essential component of maintaining well-being amid uncertain times.





UK and France Beauty Content Appeared More “Business As Usual”

U.K. Beauty: Beauty brands in the U.K. saw similar EMV surges from February to March. Many of the same factors that fueled strong March performances for U.S. cosmetics brands also contributed to the success of standout U.K. brands: an increased proportion of quarantine-friendly content like tutorials, heightened product loyalty, and greater activity from consistent brand fans. However, content mentioning beauty brands in the U.K. generally displayed less of a tangible impact from the COVID-19 crisis than content mentioning beauty brands in the U.S., perhaps due to differences in the crisis’ development within each region.



France Beauty: In France, some beauty influencers have acknowledged the crisis: YouTuber Marie Lopez (EnjoyPhoenix), for example, has been actively vlogging her time in self-quarantine and sharing cooking tutorials to support her followers at home. However, many other bloggers have continued to post organic makeup looks, skincare routines, and product reviews without any mention of recent developments.



Fashion Influencers Got Creative With At-Home Fashion Content

Luxury Fashion: In most months, fashion and lifestyle influencers’ Instagram feeds are flooded with jet-setting content from fashion weeks, exclusive events, and exotic getaways. Not surprisingly, March proved very different. From February to March, the Luxury Fashion EMV Index (which tracks the EMV performance of the luxury fashion vertical in the U.S.) declined 36%. While this drop-off was likely exaggerated by the effects of COVID-19, a February-to-March decline is often expected in luxury fashion following February’s surge in impactful content creation around Fashion Month. (From February 2019 to March 2019, the Luxury Fashion EMV Index declined 22%.) Influencers’ luxury fashion content in March varied in response to COVID-19. Many top-earning posts were from the final shows of Fashion Month that took place in the beginning of March, before most city-wide quarantines were enacted. However, later in the month, influencers started tagging luxury brands in their “quarantine outfit-of-the-day” posts, which ranged from comfy at-home looks (in luxury loungewear) to more glamorous luxury ensembles, “just because.” Many influencers adopted the “quarantine, but make it fashion” trend and decided to dress up “for my couch” or “to go downstairs,” as a way to have fun and feel good, even when staying at home. Others mostly posted throwbacks to their “pre-quarantine” looks, to reminisce on better times when they weren’t “wearing sweats all day,” and shared how excited they are to dress up to go out again.



Fashion (continued)



Apparel: Meanwhile, widespread stay-at-home orders barred apparel brands from hosting trips and other in-person activations, but apparel bloggers similarly continued to inspire trend-conscious audiences by sharing “quarantine outfits” from their houses, often tagging their posts #StayHome. For activewear and athleisure brands, at-home fitness content has proved a key EMV-driver. Fitness bloggers who have historically shared gym routines are pivoting into home workouts, with many creating personal home training and nutrition programs to support their followers’ health and well-being. Finally, in the absence of physical events, we’ve seen apparel brands leverage branded hashtags to spread awareness and foster a sense of virtual community. From Nike’s star-studded #PlayInside #PlayForTheWorld initiative promoting indoor activity to SheIn’s #SheInAtHome social distancing campaign, brands across verticals are rallying influencers to spread awareness about key safety measures.



@hannahg11 via Instagram

Moving Forward: What About After March?

April and beyond brings even more unknowns to how the COVID-19 crisis may continue to influence the beauty and fashion industries, but the data thus far is encouraging: with more influencers and individuals creating and seeking content and connections online, brands should feel confident that a renewed focus on digital marketing is more important than ever. And for our part, Tribe Dynamics remains committed to providing our audiences and customers with as much support as possible in adapting their influencer marketing strategies in this new landscape.

Top 10 Cosmetics Brands

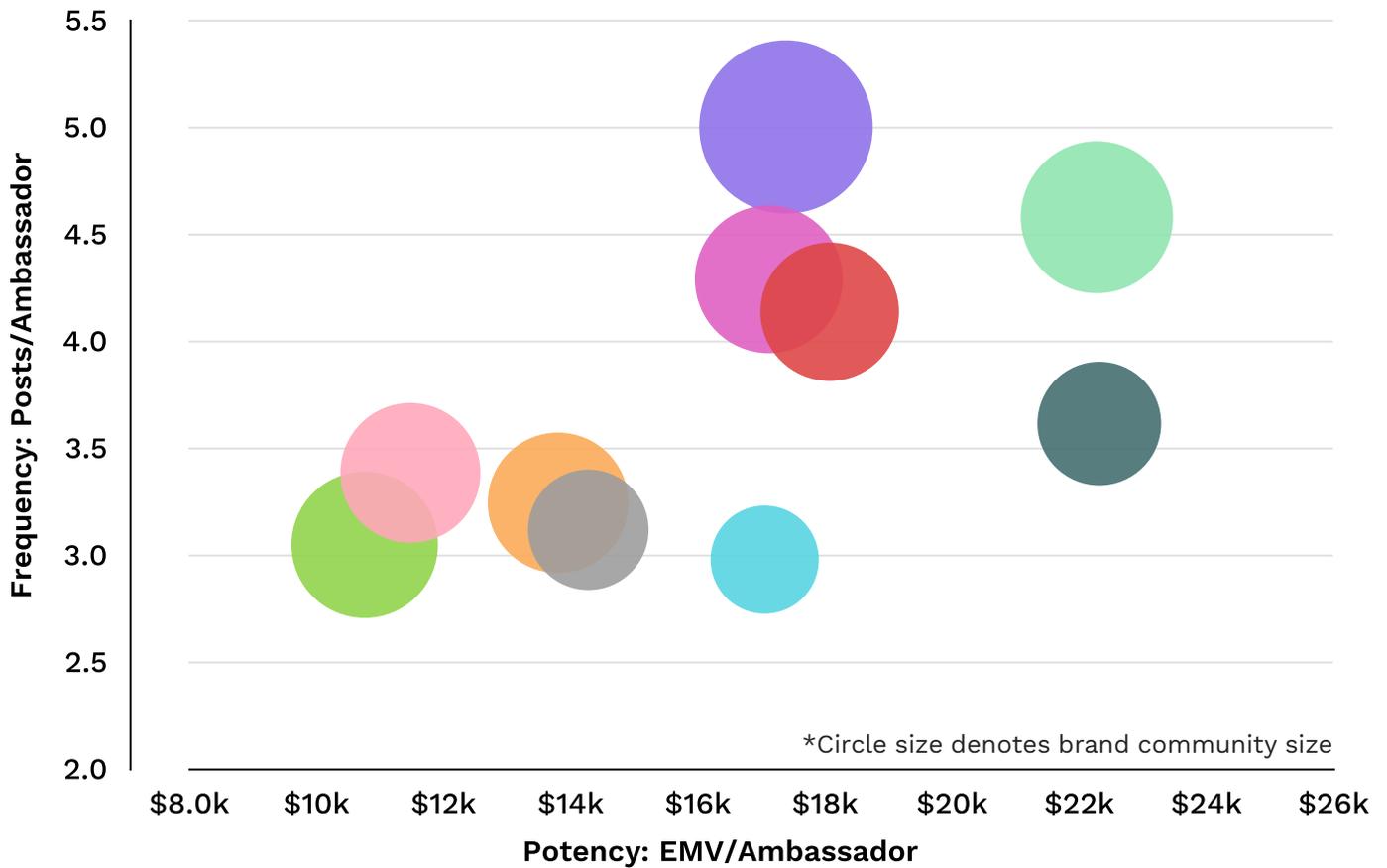


Rank	Brand	March 2020 EMV	MoM	YoY
1st → 0	Anastasia Beverly Hills	\$93,289,574	↗ 9%	↘ -41%
2nd → 0	ColourPop	\$91,836,596	↗ 9%	↘ -1%
3rd → 0	Morphe	\$66,614,785	↗ 6%	↘ -38%
4th → 0	Benefit	\$61,786,681	↗ 4%	↘ -15%
5th → 0	Huda Beauty	\$60,784,757	↗ 28%	↘ -30%
6th → 0	Fenty Beauty	\$48,584,834	↗ 11%	↘ -13%
7th → 0	MAC	\$41,103,900	↗ 1%	↘ -43%
8th ↗ 2	NYX Professional Makeup	\$40,091,941	↗ 22%	↘ -47%
9th ↘ 1	Too Faced	\$36,930,850	↗ 3%	↘ -41%
10th ↘ 1	Laura Mercier	\$35,569,574	↗ 2%	↗ 33%

Top 10: Community Metrics



Community Size, Frequency, and Potency for US Cosmetics



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Anastasia Beverly Hills	5,363	5.0	\$17,395
ColourPop	4,121	4.6	\$22,285
Morphe	3,890	4.3	\$17,125
Benefit	3,417	4.1	\$18,082
Huda Beauty	2,723	3.6	\$22,323
Fenty Beauty	3,518	3.2	\$13,810
MAC	3,817	3.0	\$10,769
NYX Professional Makeup	3,490	3.4	\$11,488
Too Faced	2,585	3.1	\$14,287
Laura Mercier	2,085	3.0	\$17,060

Brand Highlights



A Closer Look at US Cosmetics



Indie Brand: Huda Beauty

Huda Beauty enjoyed a Top 10-leading 28% month-over-month EMV growth, netting \$60.8M EMV in March. The brand's March influencer content exemplified the community loyalty and increased posting habits that fueled EMV increases for many of March's cosmetics brands: 84% of Huda Beauty's monthly total stemmed from influencers who had also mentioned the brand the previous month, with this consistent cohort's \$51.3M EMV in March proving a considerable improvement upon its collective \$40.6M EMV in February. Many of Huda Beauty's content creators mentioned TikTok in their posts, with references to the quarantine-favorite app driving \$5.3M EMV.



Fenty Beauty

Fenty Beauty closed March with \$48.6M EMV, enjoying an 11% month-over-month jump. While the brand saw a bump from content inspired by a notable event that was held prior to social distancing, influencer posts from later in the month sustained buzz for Fenty Beauty. The brand's new shades of the Match Stix highlighter sparked influencer excitement, with the Match Stix surging from \$2.3M EMV in February to \$4.4M EMV in March. Like Huda Beauty, Fenty Beauty's core influencer community rallied in March with increased content creation: the brand's top 25 earners had all mentioned Fenty Beauty in February, with all but five members growing their EMV contributions MoM.



Indie Brands: Boldface Makeup & BPerfect Cosmetics

Outside of the Top 10, Boldface Makeup and BPerfect Cosmetics saw respective 196% and 49% month-over-month EMV surges. Both brands benefited from a dramatic spike in content creation from blogger Colleen Milner (@colleen.makeup on Instagram). The eyeshadow expert ranked as Boldface Makeup's No. 2 earner with \$532.7k EMV after not mentioning the brand last month, and drove \$541.4k EMV as BPerfect Cosmetics' top earner, a 196% MoM increase. Colleen's consistent inclusion of her favorite products from both brands in her makeup looks underscored how, in a month defined more by tutorial creation and product loyalty than splashy initiatives, an individual influencer's organic brand affinity made a larger difference than ever. In all, Boldface Makeup and BPerfect Cosmetics accrued \$10.0M EMV and \$8.9M EMV, respectively.

Top 10 Skincare Brands



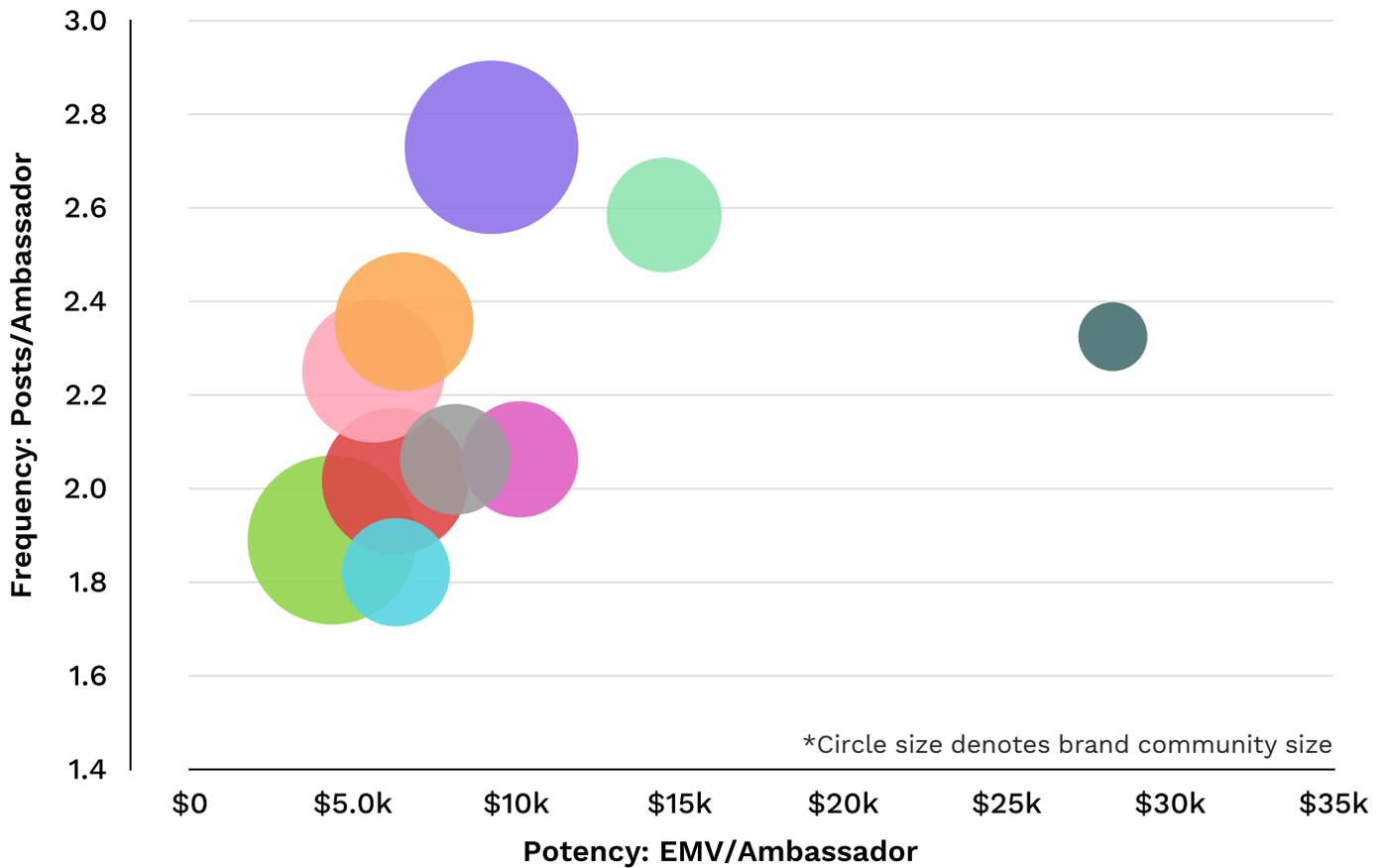
Rank	Brand	March 2020 EMV	MoM	YoY
1st → 0	Tatcha	\$10,901,689	↗ 20%	↘ -43%
2nd ↗ 1	Fourth Ray Beauty	\$7,488,785	↗ 47%	↗ 1,882%
3rd ●	Ole Henriksen	\$5,360,706	↗ 58%	↘ -28%
4th ↘ 2	Fresh	\$5,291,899	↘ -1%	↗ 7%
5th → 0	Farsáli (Skincare)	\$5,257,271	↗ 7%	↘ -20%
6th ↗ 3	Good Molecules	\$4,962,529	↗ 38%	↗ 5,346%
7th ↘ 1	Pixi Beauty (Skincare)	\$4,897,289	↗ 14%	↘ -36%
8th ↗ 2	Drunk Elephant	\$4,500,919	↗ 28%	↘ -26%
9th ↘ 5	Glow Recipe	\$3,916,081	↘ -22%	↗ 1%
10th ●	Dermalogica	\$2,909,277	↗ 37%	↘ -5%

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

Top 10: Community Metrics



Community Size, Frequency, and Potency for US Skincare



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Tatcha	1,177	2.7	\$9,262
Fourth Ray Beauty	515	2.6	\$14,541
Ole Henriksen	529	2.1	\$10,134
Fresh	838	2.0	\$6,315
Farsáli (Skincare)	186	2.3	\$28,265
Good Molecules	753	2.4	\$6,590
Pixi Beauty (Skincare)	1,116	1.9	\$4,388
Drunk Elephant	796	2.2	\$5,654
Glow Recipe	480	2.1	\$8,159
Dermalogica	459	1.8	\$6,338

Brand Highlights



A Closer Look at US Skincare



Indie Brand: Bliss

Bliss' \$1.6M EMV in March marked an impressive 114% month-over-month surge. This month, the brand sent influencers its Bright Idea Collection, partnering with multiple skincare enthusiasts on giveaways of the popular range. Blogger Jade Marie (@jadeywadey180 on Instagram) encouraged her followers to use the collection to create "a moment of bliss and relaxation during this time," deeming the line "#JadeyApproved," while other influencers shared that the products helped "brighten" their days. The collection powered \$377.8k EMV as Bliss' No. 1 March offering, nearly triple its \$137.7k EMV February haul.



Indie Brand: Peter Thomas Roth

Peter Thomas Roth accrued \$1.5M EMV in March, a 34% month-over-month growth that stemmed in part from content creators who featured the brand's face mask offerings in their "quarantine self-care" content. Influencers particularly favored the Rose Stem Cell Bio-Repair Gel Mask and Cucumber Gel Mask, which netted a respective \$134.1k EMV and \$126.1k EMV (MoM increases of 1.2k% and 12%) as Peter Thomas Roth's top two products. Meanwhile, #SkincareRoutine generated \$145.7k EMV in March, improving upon its \$85.8k EMV in February, while #StayHome netted \$134.4k EMV. Both tags ranked among Peter Thomas Roth's top 10 March hashtags.

Top 10 Haircare Brands



Rank	Brand	March 2020 EMV	MoM	YoY
1st → 0	Olaplex	\$6,574,871	↗ 11%	↘ -10%
2nd → 0	Redken	\$5,571,144	↘ -3%	↘ -39%
3rd → 0	Arctic Fox Hair Color	\$5,219,807	↗ 10%	↘ -25%
4th → 0	Brazilian Bond Builder	\$4,625,603	↗ 2%	↘ -48%
5th → 0	Schwarzkopf Professional	\$3,659,925	↘ -3%	↘ -31%
6th ↗ 1	Pulp Riot	\$3,565,797	↗ 8%	↘ -26%
7th ↗ 2	Ouai	\$3,138,161	↗ 6%	↘ -40%
8th → 0	Matrix	\$3,041,372	↘ -6%	↘ -53%
9th ↘ 3	Amika	\$2,813,774	↘ -22%	↘ -1%
10th ●	Wella	\$2,253,877	↘ -11%	↘ -34%

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

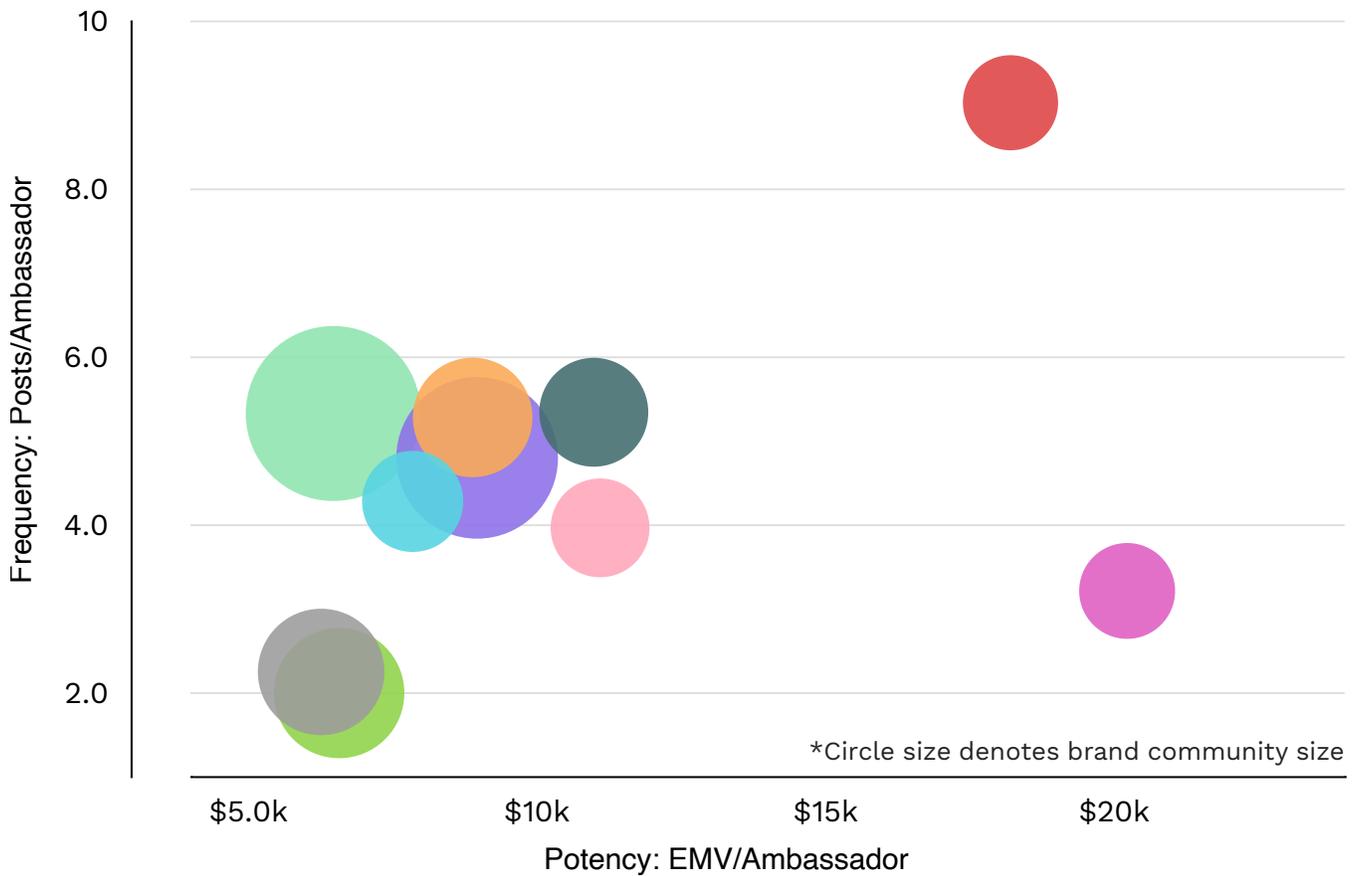
Top 5 Tools, Wigs, & Extensions

	Brand	March 2020 EMV
1st	Bellami	\$4,867,868
2nd	Framar	\$4,482,184
3rd	Dyson (Haircare)	\$3,170,416
4th	Insert Name Here	\$2,885,521
5th	ghd	\$2,633,960

Top 10: Community Metrics



Community Size, Frequency, and Potency for US Haircare



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
● Olaplex	733	4.8	\$8,970
● Redken	860	5.3	\$6,478
● Arctic Fox Hair Color	258	3.2	\$20,232
● Brazilian Bond Builder	254	9.0	\$18,211
● Schwarzkopf Professional	333	5.3	\$10,991
● Pulp Riot	401	5.3	\$8,892
● Ouai	477	2.0	\$6,579
● Matrix	274	4.0	\$11,100
● Amika	449	2.2	\$6,267
● Wella	287	4.3	\$7,853

Brand Highlights



A Closer Look at US Haircare



Madame C.J. Walker Beauty Culture

This month, Madame C.J. Walker Beauty Culture benefited from the March 20 debut of Netflix's *Self Made*, a mini-series recounting the inspirational life story of brand founder C.J. Walker. As a result of the program, the brand received glowing shout-outs from media outlets and celebrities, including *Ebony Magazine* and Tiffany Haddish (@tiffanyhaddish on Instagram). Madame C.J. Walker Beauty Culture closed March with \$2.0M EMV, an impressive 187% month-over-month EMV growth.



Sexy Hair

Sexy Hair netted \$1.8M EMV in March, a 33% month-over-month EMV increase and the brand's highest monthly total since October 2019 (\$2.0M EMV). The brand's top March product, the Rose Elixir hair oil, contributed to this momentum, driving \$335.3k EMV (more than double its \$153.9k EMV February total). Thanks largely to its inclusion in at-home tutorial content, the Rose Elixir expanded its community from 10 content creators last month to 16 this month. Additionally, consistent advocate (and Sexy Hair partner) Antonio Estrada (@antestradahair on Instagram) increased his EMV contribution for the oil from \$15.0k EMV in February to \$105.5k EMV in March.



SheaMoisture

SheaMoisture collected \$1.4M EMV in March, enjoying a solid 43% month-over-month growth. While SheaMoisture's core community of curly-haired influencers remained active, the brand also saw an influx of influencers who hadn't mentioned SheaMoisture in February. Incoming creators generated 65% (\$913.4k EMV) of the brand's monthly total, many of whom emphasized communal solidarity in their content. Additionally, several bloggers, including Maryam Iman (@manifesting_mary on Instagram), combined their haircare content with wellness-focused lifestyle elements such as meditation or yoga.

Top 10 Beauty Brands in the UK



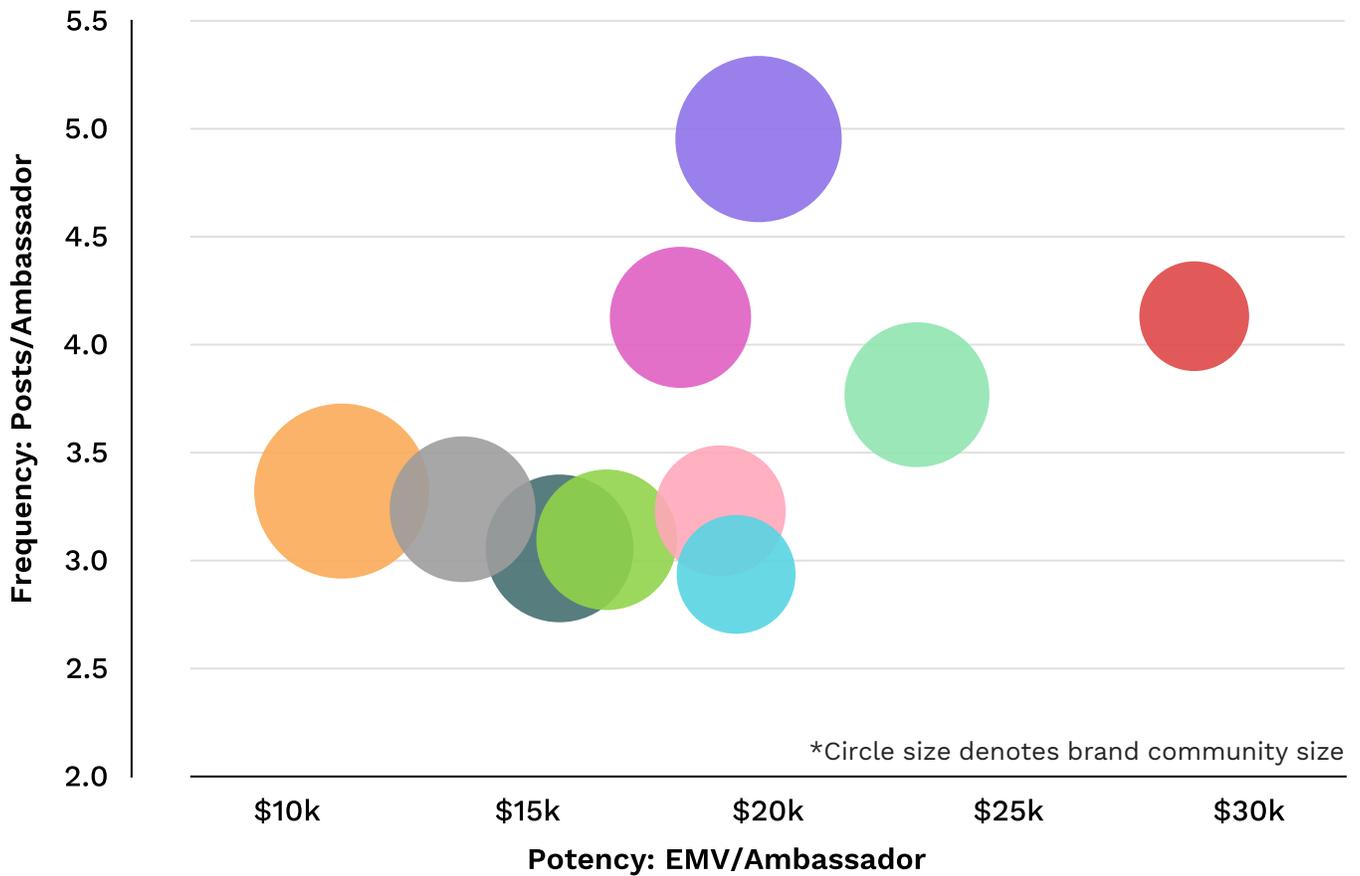
Rank	Brand	March 2020 EMV	MoM	YoY
1st → 0	Anastasia Beverly Hills	\$23,202,961	↗ 18%	↘ -31%
2nd ↗ 1	Huda Beauty	\$20,543,550	↗ 43%	↘ -25%
3rd ↗ 2	Morphe	\$15,353,000	↗ 19%	↘ -24%
4th → 0	ColourPop	\$14,725,402	↗ 12%	↗ 18%
5th ↘ 3	NARS	\$14,501,183	↘ -3%	↗ 1%
6th → 0	MAC	\$14,472,305	↗ 22%	↘ -29%
7th ↗ 1	Fenty Beauty	\$13,958,960	↗ 28%	↗ 15%
8th ↘ 1	Benefit	\$13,806,898	↗ 25%	↘ -16%
9th ●	NYX Professional Makeup	\$12,295,653	↗ 64%	↘ -36%
10th → 0	Too Faced	\$11,570,333	↗ 21%	↗ 8%

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

Top 10: Community Metrics



Community Size, Frequency, and Potency for UK Beauty

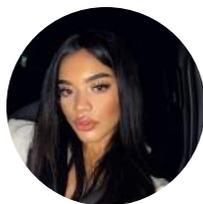


Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Anastasia Beverly Hills	1,171	4.9	\$19,815
Huda Beauty	889	3.8	\$23,109
Morphe	844	4.1	\$18,191
ColourPop	510	4.1	\$28,873
NARS	925	3.1	\$15,677
MAC	1,298	3.3	\$11,150
Fenty Beauty	838	3.1	\$16,657
Benefit	726	3.2	\$19,018
NYX Professional Makeup	900	3.2	\$13,662
Too Faced	598	2.9	\$19,348

Brand Highlights



A Closer Look at Beauty in the UK



NYX Professional Makeup

NYX Professional Makeup garnered \$12.3M EMV in March, enjoying a Top 10-leading 64% month-over-month growth. The brand saw a surge in content creation from tutorial-based bloggers like Jahanara Rahman (@jahanara.makeup on Instagram), who drove \$389.6k EMV—a 510% MoM increase—by featuring a range of NYX products across 10 makeup looks. Jahanara’s content typified the brand’s broader uptick in organic influencer mentions in tutorials this month. Additionally, Jahanara’s increased output underscored the role that NYX’s consistent fans played in the brand’s MoM growth: influencers who posted about NYX in both February and March totaled \$8.9M EMV this month, up from their \$6.1M EMV last month.



Indie Brand: SUVA Beauty

Outside of the Top 10, SUVA Beauty’s \$2.7M EMV represented a notable 83% month-over-month jump. The brand, which offers bold, brightly pigmented products, was well-suited for March’s array of creative makeup tutorials. SUVA Beauty enjoyed increased mentions from existing fans, who generated \$48.1k EMV each in March, compared to \$30.3k EMV each in February. As was also a March trend among several high-growth U.S. brands, many of SUVA Beauty’s content creators in the U.K. found or rediscovered the brand via TikTok: mentions of the popular app generated \$699.9k EMV.

Top 10 Beauty Brands in France



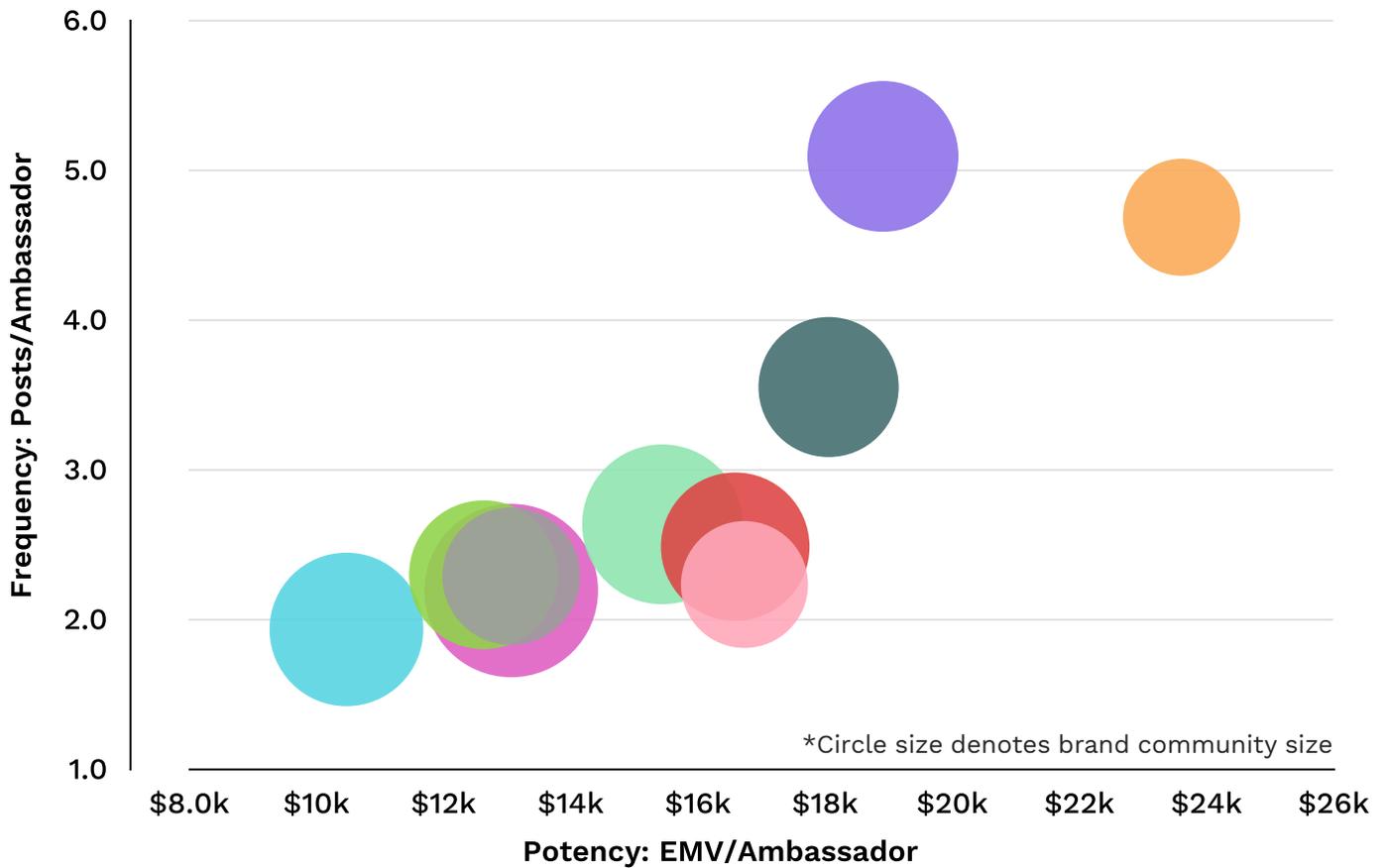
Rank	Brand	March 2020 EMV	MoM	YoY
1st ↑ 1	Anastasia Beverly Hills	\$3,046,031	↑ 12%	↓ -13%
2nd ↓ 1	Fenty Beauty	\$2,796,057	↓ -1%	↑ 45%
3rd ↑ 2	MAC	\$2,784,704	↑ 26%	↑ 8%
4th ↓ 1	Too Faced	\$2,589,024	↑ 3%	↓ -25%
5th ↓ 1	NYX Professional Makeup	\$2,511,070	↑ 12%	↓ -27%
6th ↑ 2	Morphe	\$2,290,853	↑ 31%	↑ 37%
7th ↑ 3	Huda Beauty	\$1,984,370	↑ 22%	↓ -32%
8th ↑ 1	Tarte	\$1,908,574	↑ 16%	↓ -39%
9th ●	Benefit	\$1,751,910	↑ 18%	↓ -20%
10th ●	Dior (Beauty)	\$1,750,333	↑ 45%	↓ -24%

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

Top 10: Community Metrics



Community Size, Frequency, and Potency for France Beauty



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
● Anastasia Beverly Hills	161	5.1	\$18,919
● Fenty Beauty	181	2.6	\$15,448
● MAC	213	2.2	\$13,074
● Too Faced	156	2.5	\$16,596
● NYX Professional Makeup	139	3.5	\$18,065
● Morphe	97	4.7	\$23,617
● Huda Beauty	157	2.3	\$12,639
● Tarte	114	2.2	\$16,742
● Benefit	134	2.3	\$13,074
● Dior (Beauty)	167	1.9	\$10,481

Brand Highlights



A Closer Look at Beauty in France



Indie Brand: Anastasia Beverly Hills

Anastasia Beverly Hills overtook Fenty Beauty to claim the No. 1 position in the March Top 10 with \$3.0M EMV, a 12% month-over-month increase. Special-effects makeup artist Marion Moretti (@marioncameleon on Instagram) single-handedly contributed 19% (\$564.6k EMV) of the brand's total across 10 unsponsored posts showcasing her trademark ethereal looks. Anastasia Beverly Hills also featured in content from retailer Sephora's #AtHomeWithSephora campaign promoting social distancing: the hashtag accrued \$34.1k EMV from seven content creators.



Indie Brand: Morphe

Morphe grew 31% month-over-month, claiming the No. 6 spot in the Top 10 with \$2.3M EMV. The brand enjoyed sustained momentum around its early 2020 product releases, such as the January-launched Morphe x Pony Park range and the February-launched Jaclyn Hill Palette Volume II. Both offerings ranked among Morphe's top five March products: while the Morphe x Pony Park collection fell from \$219.2k EMV last month to \$151.9k EMV this month, the Jaclyn Hill Palette Volume II shot from just \$23.8k EMV in February to \$143.8k EMV in March.



Indie Brand: HelloBody

While HelloBody fell outside of the Top 10 with \$1.4M EMV, the brand achieved an impressive 86% month-over-month growth. HelloBody owed its success almost entirely to powerhouse YouTuber Marie Lopez (EnjoyPhoenix), who increased her EMV contribution from \$588.2k EMV via 10 posts last month to \$1.1M EMV across 34 mentions this month. The beauty guru consistently included her personal discount code for the brand in vlogs chronicling her experience in self-quarantine, as well as lighthearted content—such as a comedic “mon MEC ou mon CHIEN” (“my man or my dog”) video—aimed at lifting the spirits of housebound followers.

Top 10 Luxury Fashion Brands



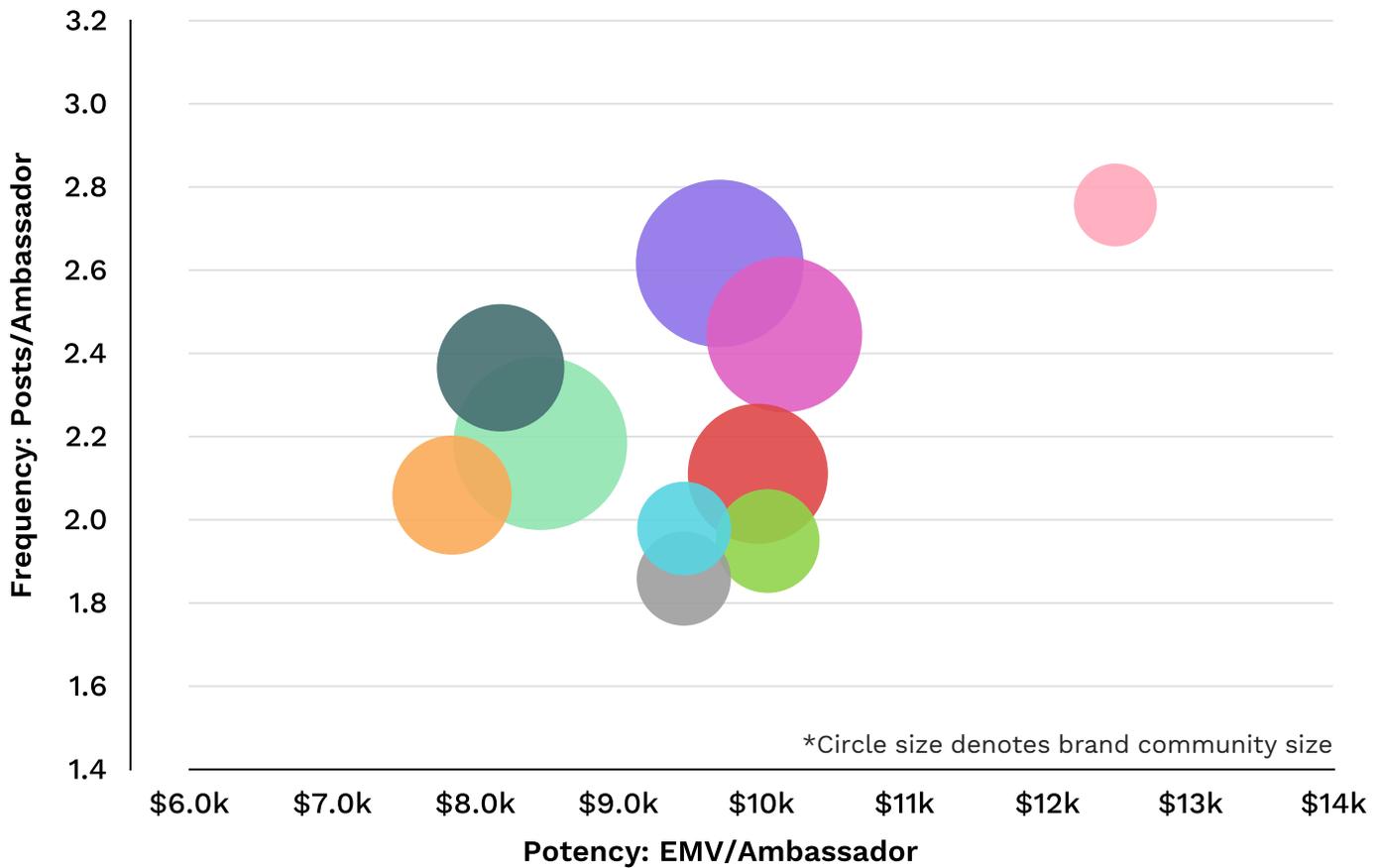
Rank	Brand	March 2020 EMV	MoM	YoY
1st ↑ 1	Chanel (Fashion)	\$26,544,675	↓ -9%	↓ -27%
2nd ↓ 1	Gucci (Fashion)	\$24,792,898	↓ -29%	↓ -32%
3rd → 0	Louis Vuitton	\$23,946,390	↓ -9%	↓ -26%
4th → 0	Dior (Fashion)	\$19,050,311	↓ -27%	↓ -18%
5th → 0	Prada	\$12,933,543	↓ -43%	↓ -6%
6th ↑ 1	Saint Laurent (YSL) (Fashion)	\$10,844,075	↓ -39%	↓ -28%
7th ●	Balenciaga	\$10,539,700	↑ 4%	↓ -34%
8th ●	Bottega Veneta	\$8,335,528	↓ -26%	↑ 805%
9th ↓ 1	Fendi	\$8,165,364	↓ -45%	↓ -30%
10th ↓ 4	Versace	\$8,110,483	↓ -60%	↓ -32%

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

Top 10: Community Metrics



Community Size, Frequency, and Potency for Luxury Fashion



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
● Chanel (Fashion)	2,733	2.6	\$9,713
● Gucci (Fashion)	2,931	2.2	\$8,459
● Louis Vuitton	2,356	2.4	\$10,164
● Dior (Fashion)	1,909	2.1	\$9,979
● Prada	1,581	2.4	\$8,181
● Saint Laurent (YSL) (Fashion)	1,383	2.1	\$7,841
● Balenciaga	1,049	1.9	\$10,047
● Bottega Veneta	668	2.8	\$12,478
● Fendi	863	1.9	\$9,462
● Versace	857	2.0	\$9,464

Brand Highlights



A Closer Look at Luxury Fashion



Gucci

Gucci ranked No. 2 in March's Top 10 with \$24.8M EMV, a 29% month-over-month decline. Influencers tagged the brand in outfit posts both before and during the quarantine, with mentions of "quarantine" powering \$769.8k EMV for Gucci—more than any other Top 10 brand. Meanwhile, #StayHome drove \$366.2k EMV as one of Gucci's 10 highest EMV-driving March hashtags. Blogger Sammi Jefcoate (@sammijefcoate) featured a handbag from the brand in an outfit Instagram acknowledging the pandemic, sharing that "getting dressed every day is totally helping to keep me sane." Sammi ranked as one of Gucci's top three March ambassadors, contributing \$470.8k EMV across eight pieces of content.



Balenciaga

Balenciaga collected \$10.5M EMV in March, experiencing a 4% month-over-month boost—the only growth in this month's Top 10. The brand also enjoyed a 10% MoM expansion of its ambassador community, and a 13% MoM increase in post volume. Content creators including Jeffree Star (@jeffreestar) paired Balenciaga sneakers with loungewear in Instagrams of their at-home outfits: mentions of "quarantine" drove \$461.4k EMV. A significant \$178.7k EMV of this total came from Jeffree's "Quarantine & Strike a Pose" outfit post, the brand's top-earning piece of March content.

Top 10 Apparel Brands



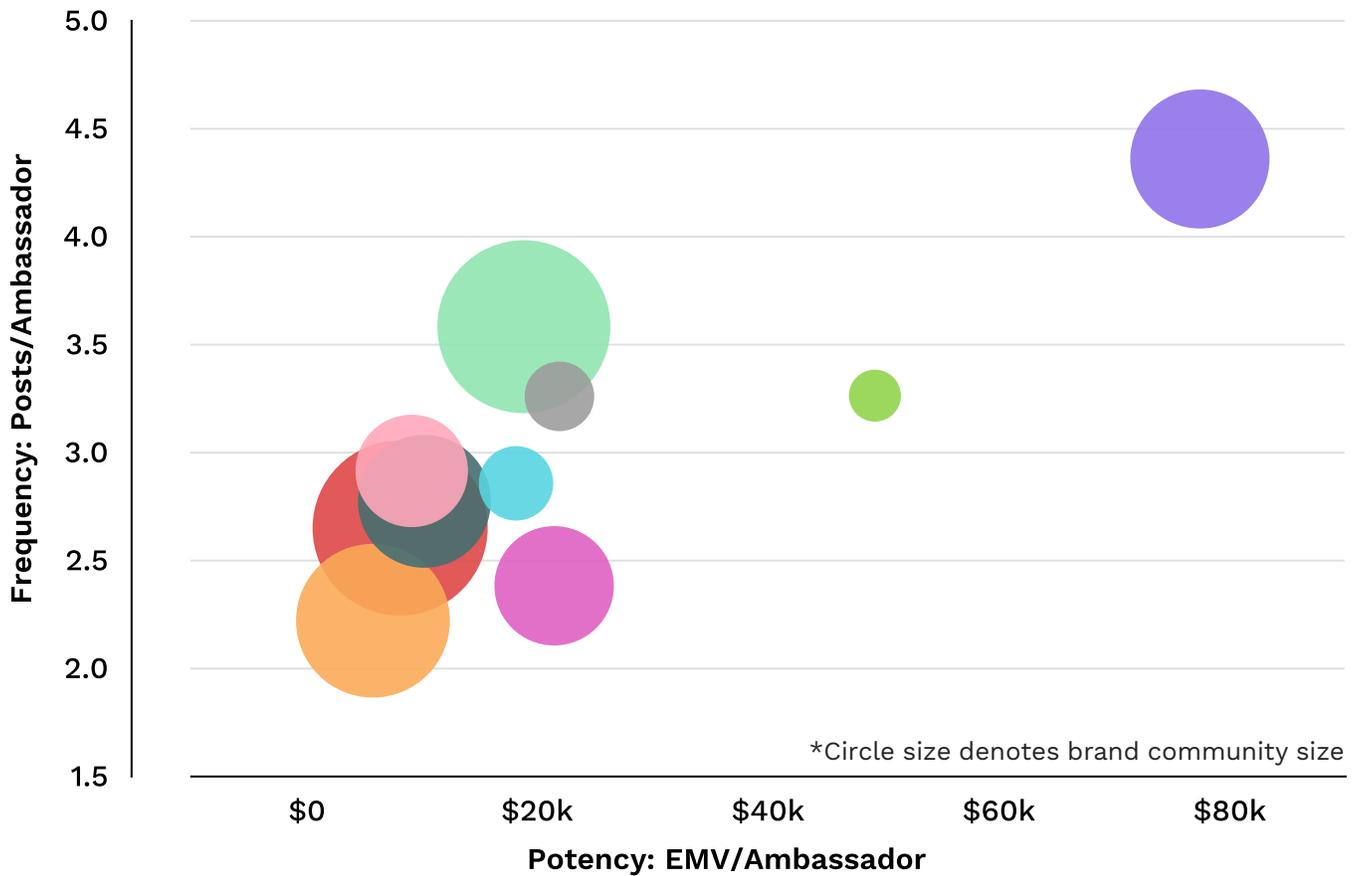
Rank	Brand	March 2020 EMV	MoM	YoY
1st → 0	Fashion Nova	\$175,375,539	↗ 4%	↘ -25%
2nd → 0	Nike	\$66,145,475	↘ -2%	↘ -7%
3rd → 0	PrettyLittleThing	\$35,851,651	↘ -7%	↘ -40%
4th → 0	Zara	\$29,287,855	↘ -11%	↘ -25%
5th → 0	Adidas	\$21,186,689	↘ -27%	↘ -38%
6th → 0	H&M	\$16,095,387	↘ -21%	↘ -38%
7th ●	Gymshark	\$15,581,728	↗ 41%	↘ -1%
8th ↘ 1	SheIn	\$13,570,362	↘ -11%	↘ -2%
9th ●	Yeezy	\$12,438,430	↗ 17%	↗ 28%
10th ●	Alo Yoga	\$11,787,373	↗ 17%	↘ -26%

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

Top 10: Community Metrics



Community Size, Frequency, and Potency for Apparel



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
● Fashion Nova	2,264	4.4	\$77,463
● Nike	3,500	3.6	\$18,899
● PrettyLittleThing	1,666	2.4	\$21,520
● Zara	3,582	2.6	\$8,176
● Adidas	2,061	2.8	\$10,280
● H&M	2,764	2.2	\$5,823
● Gymshark	316	3.3	\$49,309
● SheIn	1,478	2.9	\$9,182
● Yeezy	566	3.3	\$21,976
● Alo Yoga	647	2.9	\$18,219

Brand Highlights



A Closer Look at Apparel



Athleisure: Gymshark

Gymshark returned to the Top 10 at No. 7 in March after a February absence with \$15.6M EMV, a leading 41% month-over-month surge. The brand enjoyed a boost from at-home workout content:

#HomeWorkout and

#AtHomeWorkouts ranked as the brand's top two hashtags with \$1.6M EMV and \$1.4M

EMV, outperforming

#Gymshark (\$1.2M EMV).

Trainer and Gymshark partner Whitney Simmons

(@whitneysimmons on Instagram) proved the most impactful of #HomeWorkout's

31 ambassadors, contributing \$323.9k EMV of the tag's total via four minimal-equipment workout videos.



Fast Fashion: SheIn

SheIn collected \$13.6M EMV in March, landing at No. 8. The brand celebrated its spring sale remotely by tapping bloggers such as Hannah Godwin (@hannahg11 on Instagram) and Lauren Butler (@amourdelavie) to share their personal discount codes in home outfit posts tagged #SheInSpringItOn. SheIn also leveraged its influencer family to explicitly promote social distancing via its #SheInAtHome campaign: participants like Miss Bo (@_missbo) blogged about their favorite quarantine activities and showcased comfortable pieces from the brand. In all, #SheInSpringItOn generated \$1.2M EMV from 79 content creators, while #SheInAtHome accrued \$698.6k EMV from 43 bloggers.



Athleisure: Alo Yoga

Alo Yoga placed No. 10 in the Top 10 with \$11.8M EMV, achieving a 17% month-over-month increase. The brand inspired conversation by partnering with yoga influencers including Adell Bridges (@adellbridges on Instagram) and Leanna Decker (@leannadecker) on virtual classes via its Alo Moves at-home yoga program. The associated #OmAtHome garnered \$159.4k EMV from 18 content creators, including participating instructors as well as fitness bloggers who organically used the tag in home workout content. Alo Yoga apparel also enjoyed widespread mentions from lifestyle bloggers who promoted social distancing in posts tagged #StayHome (\$229.7k EMV).



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.”