

TRENDTALK

September 19, 2013



#NYFW 2013

The Labels Who Lead in Social Influence

630,000 . . .

The number of viewers who tuned in to watch the Mercedes-Benz Fashion Week's live streaming shows for 2013. In just the 6 months or so since February's show, online viewership jumped an impressive 50%, with viewing time up about 40% to an average 20 minutes.

However, as anyone may have guessed, viewership was not evenly split between the fifty-nine collections, according to IMG and Rightster, the live-stream provider for the shows.

With this discrepancy in mind, we created this report to give a larger picture understanding of NYFW's designers who generated the greatest social influence over the course of the week. The data included in our report spans the Sunday prior to its launch to the Sunday following the final catwalk. Take a look at the designers who this year excelled in the digital sphere.

Fashion Goes Digital

The push towards online engagement

Perhaps the most compelling statement to come out of NYFW 2013 about the future of the industry came from Women's Wear Daily, who stated: "ramped-up social media and live streaming have led Fashion Week to become a veritable digital spectator sport."

The increased coverage and viewership for the event was in part due to the more than 195 outlets who this year were permitted to stream and promote the shows directly from their sites, according to Fashionista.

From just a general online search, it's clear that media coverage of the event in general was highly focused on the digital revolution that has hit the industry: the arrival of new technology like Google Glass on the runway and each designer's ability to integrate digital strategies into their brand. This year, far more than in years past, we walked away from the week feeling that equal focus had been given to the digital recreation of the live experience. From blogger contests and Tumblr campaigns to Snapchat marketing, it was clear that designers felt the pressure to amplify their label's digital engagement.

"Ramped-up social media and live streaming have led Fashion Week to become a veritable digital spectator sport." - Women's Wear Daily

In order to get a better understanding of the designers that had created the most social buzz over the course of the week, we took an in-depth look at each designer's respective engagement rates by social channel.

To begin, we made a couple of assumptions in order to limit our focus to those brands that would be more likely to produce a greater amount of influence amongst the general public. Our search therefore excluded contributors from the Academy of Art University and the Art Institute of New York City, in addition to lesser-known, emerging designers and labels.

The following were the top 10 labels who generated overall the greatest social influence between September 1st and September 15th:



The Leaders in Social Influence:

- | | |
|--------------------------|----------------------------|
| 1. Rebecca Minkoff | 6. J. Crew |
| 2. Michael Kors | 7. Calvin Klein Collection |
| 3. Nicole Miller | 8. BCBGMaxazria |
| 4. Diane Von Furstenberg | 9. Ralph Lauren |
| 5. Rachel Zoe | 10. Zac Posen |

The Digital Trendsetters

The leaders in influence by social channel

The following chart reflects the actual breakdown of each label's influence by social channel for September 1st through September 15th. Keep in mind that not all social endorsements are created equal, blog traffic and video consumption being the most valuable forms of earned media.



Label	Blog Traffic	Facebook Actions	YouTube Views	Twitter Actions
Alexander Wang	9,758,294	52	13,149	3
Rebecca Minkoff	9,741,325	837	1,988	31
Marc Jacobs	8,104,875	26	0	0
Michael Kors	7,395,144	937	49,867	6
Kate Spade	6,904,473	1388	572	3
Victoria Beckham	6,181,196	157	42,616	27
Marc by Marc Jacobs	5,835,800	16	11,081	3
Nicole Miller	4,421,549	303	82,441	0
Diane Von Furstenberg	4,174,873	0	14,568	1
Rachel Zoe	3,793,197	87	0	0

Our Tribe Influencer Database is a collection of the top 20,000 influencers in the beauty, fashion and lifestyle community industries. The brands included in each study are the most popular based on publicly available information of these brand's annual revenue, reviews from consumers and retailers.

Our ranking of NYFW designers is based on the understanding that a single blog endorsement is significantly more valuable than a Youtube view (approximately \$557.00 versus \$4.42). Therefore, Alexander Wang, despite having garnered only 13,149 YouTube views by contrast to its competitors, is still our declared social influence leader based on the impressive 9,758,294 blog endorsements the label collected during the time allotment.

Timely Engagement

Post Count and Earned Media Value Relative to Show Date

Next, we took a look at the social performance of these brands relative to the days that each label's show aired to see whether there was a relationship between the amount/value of buzz created and the timing of the endorsement relative to a show. The following metrics reflect:

- the date of each label's show
- the date the label generated the greatest number of posts along with the corresponding post count on this date
- the date the label garnered the most valuable earned media and the corresponding earned media value.

Label	Date of Show	Date of Post Peak	Peak Post Count	Date of EMV Peak	Peak EMV
Alexander Wang	9/7	9/8	104	9/8	\$75,957
Rebecca Minkoff	9/5	9/6	222	9/7 ; 9/14	\$74,757 ; \$73,190
Marc Jacobs	9/12	9/13	194	9/13	\$115,906
Michael Kors	9/11	9/11	90	9/12	\$66,689
Kate Spade	9/6	9/6	52	9/13	\$45,007
Victoria Beckham	9/8	9/9	90	9/8	\$42,071
Marc By Marc Jacobs	9/10	9/10	42	9/11	\$28,645
Nicole Miller	9/6	9/6	41	9/7	\$13,537
Diane Von Furstenberg	9/8	9/9	146	9/9	\$83,959
Rachel Zoe	9/11	9/4 ; 9/12	53 ; 38	9/4 ; 9/13	\$47,132 ; \$25,360

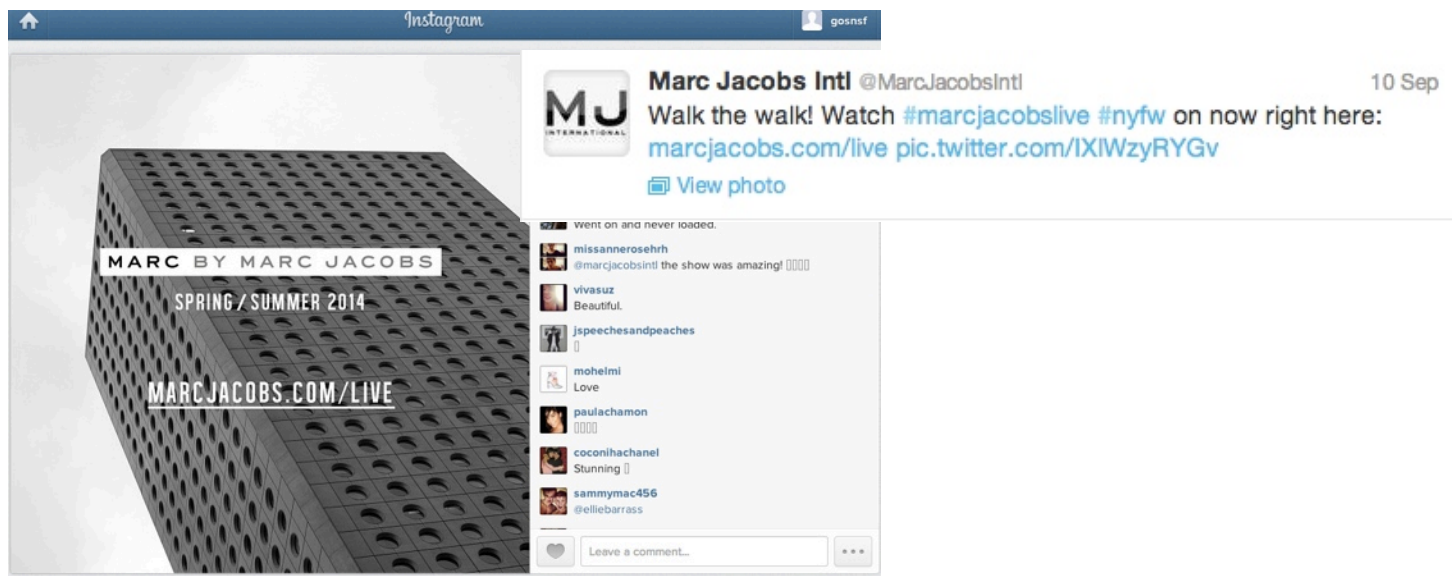
Here are some noteworthy takeaways from the above data:

- Marc Jacobs had by far the most valuable earned media for not having generated the greatest number of posts.
- Rebecca Minkoff earned it's most valuable buzz in two separate instances: just after it's show and following the official conclusion of the event. Media generated between September 13th and September 15th most likely highlighted standout designers from the week. Although we do not have technical proof, these mentions were arguably more valuable to designers.
- Rachel Zoe experienced its peak post count and EMV before the label's runway show, even before the event began. From the media our database collected, it is clear that the label worked hard to create a great deal of anticipation amongst followers going into the event via Twitter and the designer's blog "The Zoe Report".

Generating Brand Awareness

The strategies and specific campaigns of some of our the leaders

Marc By Marc Jacobs: Instagram, Twitter, live-feed from the Marc Jacobs website



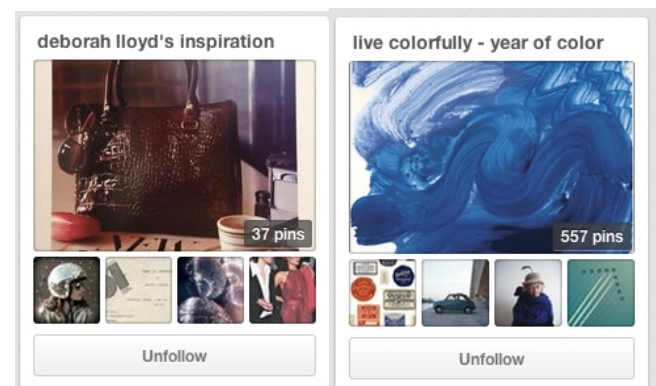
Alexander Wang: Twitter and live-feed

Rebecca Minkoff: Snapchat and Tumblr



Kate Spade: Pinterest

Rachel Zoe: Twitter and Blog



Accessibility is the Name of the Game

How the digital revolution has democratized the fashion industry

An interesting byproduct of the industry's digital revolution has been the growing focus on the every-day consumer, even amongst some of fashion's most elite labels. There is a growing consensus amongst designers that bloggers and the general public now play a crucial role in brand definition and voice.

This year, labels worked with influential bloggers, providing behind-the-scenes access and photographs from shows with the expectation that bloggers would in turn share the material with their unique communities of followers. Tommy Hilfiger, for instance, released exclusive photographs to well-respected blogger Susanna Lau, known as "Susie Bubbles", who with 204,280 Twitter followers and 79,785 Instagram followers went on to feature the shots on her blog Style Bubble.

"Today, we want to be very democratic, very inclusive. We would like anyone anything to do with fashion world, media world, tech world to see what we're doing."
- Tommy Hilfiger



Marketing strategists at Cole Haan made a similar effort to directly involve the public in the brand's experience at Fashion Week with its #SubwayStyle Tumblr campaign. The label selected a handful of bloggers to help construct the brand's unique story of the event through a series of shots and photographs from the streets of New York.



Perhaps the most apparent appeal to the public came from Rebecca Minkoff, who chose to introduce its Spring 2014 collection to fans via a series of 10 Snapchats. Earlier in the week, the label tweeted that followers could receive a preview of the line by adding the label to their Snapchat contacts. This marketing ploy was no doubt the label's attempt to brand itself as a trailblazer in innovative digital strategies. Judging by the numbers above, the label seems to have been largely successful.

"We believe the consumer is part of [fashion week] . . . The consumer has a voice and say in [our] brand, they should get special perks even if they can't attend the show." - Uri Minkoff, CEO of Rebecca Minkoff



Go Big [Digitally] or Go Home?

Does survival within the industry require a digital team?

There's been a lot of talk this year within the fashion industry, and amongst retail brands more generally, about the necessity of digital marketing tactics when it comes to engaging with consumers and building brand awareness. As the digital media explosion surrounding this year's NYFW proved, this technology is quickly becoming an industry standard: the new barrier to entry or "ticket-in" for brands hoping to rise within what traditionally has been a very exclusive, closed-off community.

To be clear, we at Tribe Dynamics fully endorse content marketing tactics that involve outreach via the various social channels. That being said, we do not want to marginalize concerns of some industry authorities voiced in the weeks following the event: that the industry's preoccupation with creating a virtual experience may in turn make Fashion Week and similar events irrelevant. Others worry about the cost of the extravagant shows and parties for particularly emerging designers, especially if labels are in fact experiencing greater ROI through digital efforts. Still, more are skeptical of the longevity of some of the marketing techniques popularized during the week. As more consumer brands outside of the industry turn to social media channels like Instagram, earned media of this kind will lose its authenticity and diminish in value, ultimately taking on characteristics similar to more traditional advertising.

Regardless of these concerns, NYFW suggests the fashion world's overall enthusiastic endorsement of social media and digital marketing as the industry's preferred medium for branding and awareness. As long as designers continue to use these outlets to enhance the earned media their followers are already generating, and avoid falling down the advertising rabbit hole, we'll be excited to see what the future holds for the cohesion of digital and fashion innovation.

