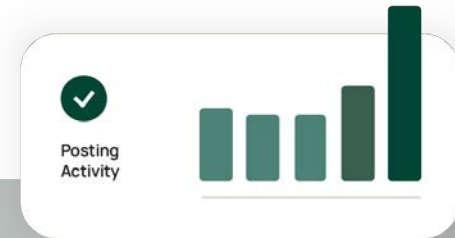**The Tribe Top 10**

Beauty and Fashion Rankings: Social Media's Top Brands

April 2023 US Beauty, Fashion, & EMEA Beauty

Posting Activity

@iloveglassestoo

$22.5k EMV
452.5k Impressions

Tribe Dynamics
A CreatorIQ Company

Contents

Top 10 Cosmetics Brands in the US

Rank	Brand	April 2023 EMV		MoM		YoY
1st → 0	Rare Beauty	$54,015,121	↘	-10%	↗	80%
2nd → 0	Charlotte Tilbury	$34,572,508	↘	-20%	↘	-2%
3rd → 0	ColourPop	$34,563,632	↘	-5%	↘	-16%
4th ↗ 5	Dior (Cosmetics)	$28,441,087	↗	5%	↗	54%
5th → 0	Fenty Beauty	$26,759,072	↘	-24%	↘	-9%
6th ↘ 2	NYX Professional Makeup	$26,355,822	↘	-26%	↘	-11%
7th ↗ 1	E.L.F.	$25,460,980	↘	-9%	↗	7%
8th ↘ 1	MAC	$24,197,587	↘	-20%	↘	-1%
9th ●	Tarte	$22,809,345	↗	22%	↗	58%
10th ↘ 4	Benefit	$22,055,737	↘	-33%	↘	-14%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Cosmetics Brands

US Cosmetics

*Circle size denotes brand community size
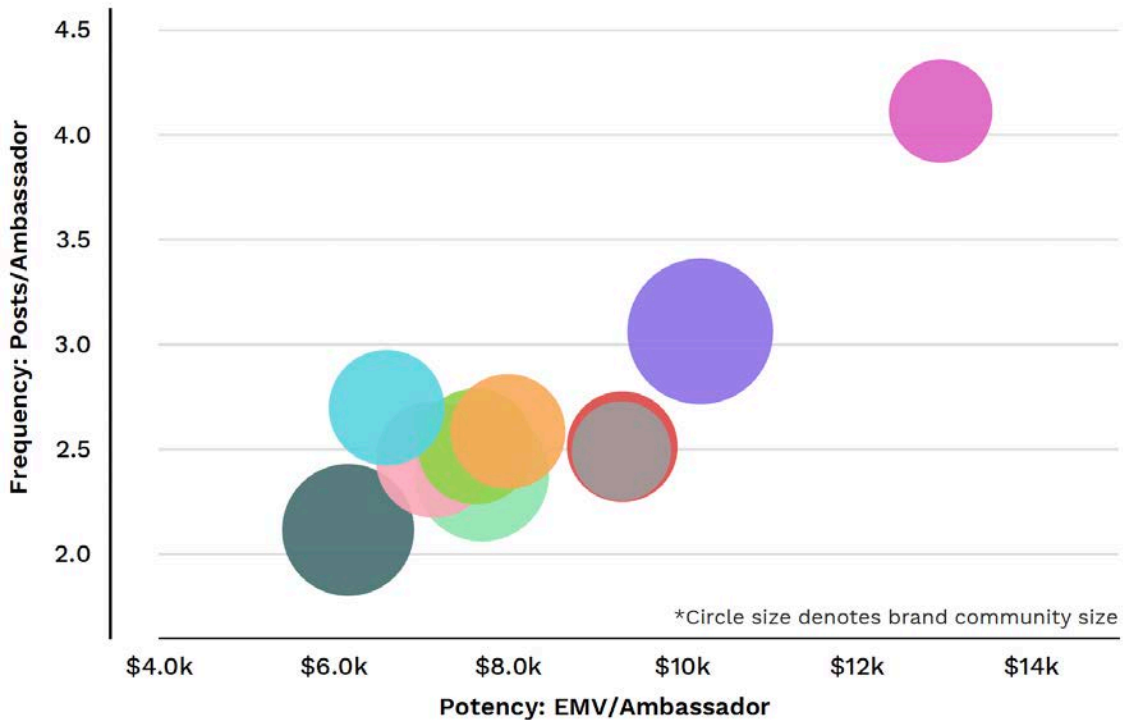
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Rare Beauty	5,292	3.1	$10,207
Charlotte Tilbury	4,488	2.4	$7,703
ColourPop	2,666	4.1	$12,965
Dior (Cosmetics)	3,054	2.5	$9,313
Fenty Beauty	4,338	2.1	$6,169
NYX Professional Makeup	3,294	2.6	$8,001
E.L.F.	3,337	2.5	$7,630
MAC	3,382	2.4	$7,155
Tarte	2,452	2.5	$9,302
Benefit	3,337	2.7	$6,609

Brand Highlights

A Closer Look at US Cosmetics

Brand:

Juvia's Place

Highlight:

Product

Juvia's Place enjoyed a fantastic month, netting $12.5M EMV. Known for its pigmented products that serve a diverse customer base, the brand tapped into the summer blush market with great success. The Blushed Collection fueled $2.8M EMV, or 23% of the brand's monthly total, inspiring 255 creators. The most impactful piece of content featuring the collection came from No. 1 EMV-driver Lindsey Rowley (@linsmakeuplooks on TikTok), who duplicated a Mario filter look. Lindsey incorporated Juvia's Place products into 22 pieces of content, driving a whopping $1.1M EMV. In all, Juvia's Place boosted its EMV by 38% month-over-month.

Brand:

Kylie Cosmetics

Highlight:

Activation

Kylie Cosmetics thrived in April, collecting $11.1M EMV, a 72% MoM increase. The brand benefited from inclusion in makeup tutorials, as well as activations surrounding its signature mascara. #Kylash, a trending mascara, powered $443.4k EMV, while #MakeupTutorial inspired $574.7k. Creators who posted about the brand in both March and April fueled $6.0M EMV in the latter month, despite making up just one third of Kylie Cosmetics 889 participating creators. Among the brand's most impactful ambassadors was business extraordinaire Kris Jenner (@krisjenner), who contributed $2.5M EMV, up 138% from March.

Brand:

Clarins Beauty

Highlight:

Product

Clarins Beauty relished in an impressive 113% MoM boost, in large part due to its popular lip oil. The brand's Lip Comfort Oil sparked $1.7M EMV in April, inspiring 177 creators to show the lip oil in action. Fanfare about the oil contributed to a content volume of 396 pieces of content, up 89% from March. Beauty creator Rudi Berry (@therudiberry on Instagram) demonstrated how to use the product to create the perfect cherry-cola lips, generating $135.0k EMV. Overall, the brand netted $2.0M EMV, of which 84% ($1.7M) represented content published by incoming creators who hadn't posted about the brand in March.

Top 10 Skincare Brands in the US

Rank	Brand	April 2023 EMV		MoM		YoY
1st ↗ 1	Drunk Elephant	$7,899,493	↘	-3%	↗	54%
2nd ↗ 3	Summer Fridays	$7,885,283	↗	5%	↗	112%
3rd ↗ 1	Glow Recipe	$7,794,050	↗	3%	↘	-32%
4th ↗ 2	La Roche-Posay	$7,226,294	↘	-1%	↗	29%
5th ↘ 4	Elemis	$6,920,166	↘	-24%	↗	204%
6th ↗ 2	Sol De Janeiro	$6,787,491	↗	4%	↗	100%
7th ↘ 4	CeraVe	$6,625,842	↘	-16%	↗	62%
8th ●	Caudalie	$6,620,523	↗	33%	↗	21%
9th ●	Supergoop!	$6,224,488	↗	31%	↘	-5%
10th ↘ 3	Kiehl's	$6,186,052	↘	-7%	↗	104%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Skincare Brands

*Circle size denotes brand community size

Frequency: Posts/Ambassador (y-axis: 1.4 to 2.4)

Potency: EMV/Ambassador (x-axis: $2.0k to $10k)

Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Drunk Elephant	1,722	2.1	$4,587
Summer Fridays	1,633	1.9	$4,829
Glow Recipe	1,499	2.0	$5,199
La Roche-Posay	1,499	1.8	$4,821
Elemis	1,085	1.9	$6,378
Sol De Janeiro	1,116	1.8	$6,082
CeraVe	790	1.8	$8,387
Caudalie	1,303	2.1	$5,081
Supergoop!	1,815	1.7	$3,429
Kiehl's	2,379	1.7	$2,600

Brand Highlights

A Closer Look at US Skincare

Brand:

Caudalie

CAUDALÍE

Highlight:

Campaign

French skincare brand Caudalie landed in the No. 8 spot this month thanks to an impressive $6.6M EMV, a 33% month-over-month gain. Caudalie celebrated the release of its Vinoperfect Brightening Eye cream by hosting a variety of new and existing U.S.-based brand fans, including Isabel Tan (@prettyfrowns on Instagram), Ava (@glowwithava), and Mireya Rios (@mireyarios on TikTok), for a getaway to Bordeaux, France. The lavish trip treated content creators to a themed dinner and spa experience featuring Caudalie's product range. This activity fueled 2.7k mentions and attracted 800 brand fans, who collectively powered $2.8M EMV—42% of April's total. Meanwhile, Caudalie continued to expand its product range with new offerings: the Spot Salicylic Solution and Vinopure Serum.

Brand:

Supergoop!

Supergoop!

Highlight:

Community

Supergoop! secured the No. 9 spot this month by collecting a notable $6.2M EMV, a 31% MoM improvement. The viral skincare brand added 1.3k brand fans, including Mariale Marrero (@mariale on Instagram), thanks in part to a partnership with beauty subscription service IPSY, which featured Supergoops!'s Daily Dose Hydra Ceramide Boost + SPF formula. The brand also expanded its network by partnering with a range of content creators, such as Clara Peirce (@clararpeirce on TikTok) and Kate Glavan (@kateglavan), who authored posts showcasing how Supergoop!'s wide range of sunscreen formulas fit into their everyday routines via content tagged #SupergoopPartner. This incoming cohort collectively powered a significant $3.3M EMV for Supergoop!—53% of the brand's monthly total— and contributed to the brand's 3.0k total mentions.

Brand:

Murad Skincare

Murad.

Highlight:

Product Launch

Science-backed Murad Skincare enjoyed a prosperous month, securing a noteworthy $4.3M EMV and a 53% MoM boost. The brand generated buzz around the launch of its new Retinal ReSculpt Overnight Treatment by tapping content creators like Janine Delaney (@janine_delaney on Instagram), Yulia Fadeeva-Hashem (@fadeeva_hashem), and Tonya Michelle (@tonyamichelle26 on TikTok) to author content highlighting the formula's numerous benefits. This activity fueled the expansion of Murad Skincare's network, which added 700 new brand fans who powered a notable $2.2M EMV for the brand. The 36% MoM community growth also fueled an increase in content volume, which spiked to 1.8k mentions— a 42% MoM jump.

Top 10 Haircare Brands in the US

US
Haircare

Rank	Brand	April 2023 EMV	MoM	YoY
1st ⬆2	K18 Hair	$8,486,642	30%	48%
2nd ⬇1	Redken	$7,353,797	-24%	-21%
3rd ⬆3	Gisou	$6,493,405	55%	210%
4th ⬇2	Olaplex	$5,553,501	-20%	-36%
5th ⬇1	Schwarzkopf Professional	$4,274,913	-15%	-24%
6th ⬆2	Ouai	$4,270,098	7%	17%
7th ⬇2	Amika	$3,888,161	-21%	-12%
8th ⬇1	Wella	$3,530,935	-12%	-30%
9th ●	Moroccanoil	$2,921,400	25%	-15%
10th ●	Oribe	$2,829,452	6%	0%

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

Top 5 Tools, Wigs, & Extensions

	Brand	April 2023 EMV
1st	Dyson (Haircare)	$8,598,294
2nd	ghd	$5,234,104
3rd	Framar	$4,654,598
4th	BaByliss	$2,268,368
5th	Bellami	$1,917,813

Tribe Dynamics
A CreatorIQ Company © 2023 Tribe Dynamics

9

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Haircare Brands

*Circle size denotes brand community size

Frequency: Posts/Ambassador (y-axis: 1.0 to 5.0)

Potency: EMV/Ambassador (x-axis: $3.0k to $8.0k)
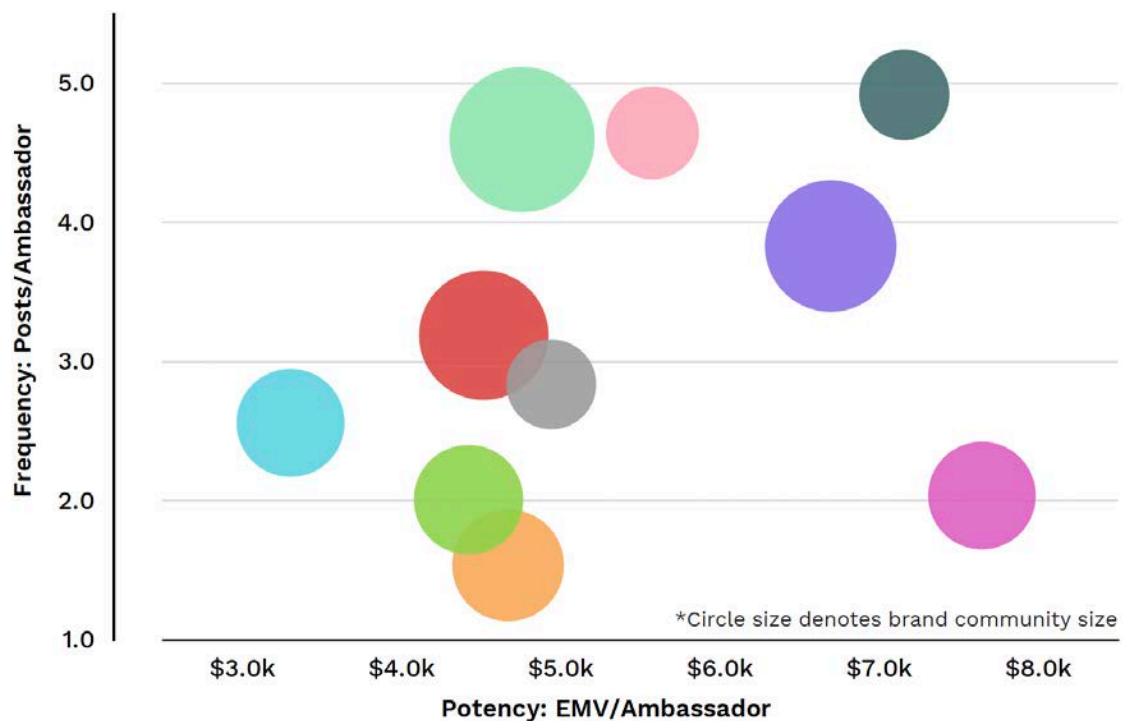
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
K18 Hair	1,267	3.8	$6,698
Redken	1,545	4.6	$4,760
Gisou	849	2.0	$7,648
Olaplex	1,229	3.2	$4,519
Schwarzkopf Professional	597	4.9	$7,161
Ouai	914	1.5	$4,672
Amika	879	2.0	$4,423
Wella	633	4.6	$5,578
Moroccanoil	591	2.8	$4,943
Oribe	856	2.6	$3,305

Brand Highlights

A Closer Look at US Haircare

Brand:
Gisou

Highlight:
Product

Cruising into the No. 3 spot on the U.S. Haircare leaderboard, Gisou netted $6.5M EMV in April. The brand benefited from buzz over the Sephora launch of its viral honey lip oil. Gisou activated its creator community, which expanded by 32% month-over-month to 849 creators. Its staple product, the Honey Infused Hair Oil, contributed $2.9M EMV, or 45% of Gisou's monthly total. Creators like Emilia Marantos (@byemmaleah on Instagram) incorporated the product into self-care rituals, ASMR wash days, and haircare round-ups. Emilia drove $355.6k EMV via five pieces of content, a 558% MoM increase. In all, Gisou's standout performance represented a 55% MoM and 210% year-over-year EMV improvement.

Brand:
Drybar

Highlight:
Community

Unique in its singular focus on blowouts, Drybar closed April with $1.7M EMV, an 83% increase from the previous month. The brand boosted its content volume by 46% MoM, with most of this momentum stemming from creators who posted about the brand in April after not doing so in March. These incoming creators contributed $1.6M EMV, or 90% of Drybar's monthly total. Among them, wellness creator Lynn Shabinsky (@whitehairwisdom on Instagram) shared content about not rushing things, featuring a drybar curler and hashtags such as #ArtInAging and #AgeIsJustANumber, which inspired $204.2k EMV. Meanwhile, No. 2 EMV-driver Sophie Graf (@sophiemariegraf on TikTok) shared a diffuser tutorial, inspiring $122.0k.

Brand:
BondiBoost

Highlight:
Campaign

Outside of the Top 10, BondiBoost enjoyed a standout 93% MoM EMV growth. To celebrate its fifth birthday, BondiBoost engaged in activities such as a sitewide sale and product giveaways, sparking a 97% MoM boost in content volume. Brand partners like Ellie Watson (@elliewatson on Instagram) and Lauren Lillie (@thelilliebag) encouraged followers to engage with their accounts, as well as BondiBoost's owned accounts, for a chance to win the brand's styling bundle. However, BondiBoost's No. 1 EMV-driver was beauty creator Emilia Marantos (@byemmaleah), who heavily featured the brand in her content, fueling $203.8k. In all, BondiBoost collected $1.5M EMV in April.
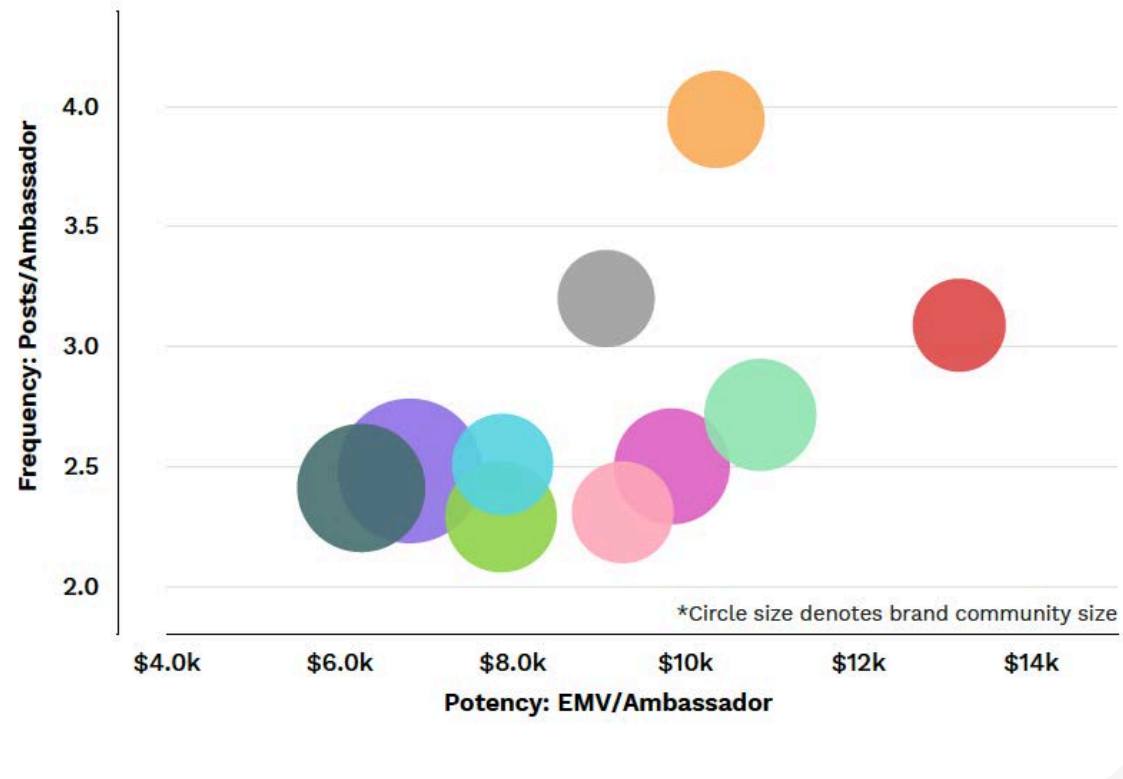
Top 10 Beauty Brands in Europe

Rank	Brand	April 2023 EMV	MoM	YoY
1st ↗ 1	Charlotte Tilbury	$20,119,157	↘ -22%	↘ -15%
2nd ↗ 3	Dior (Beauty)	$19,314,686	↗ 9%	↗ 36%
3rd ↘ 2	L'Oréal Paris	$18,650,661	↘ -37%	↗ 24%
4th ↗ 5	Rare Beauty	$16,107,576	↗ 1%	↗ 162%
5th ↘ 2	MAC	$14,505,186	↘ -32%	↘ -11%
6th ↗ 1	ghd	$13,814,915	↘ -15%	↘ -25%
7th ●	Fenty Beauty	$13,796,883	↗ 10%	↗ 26%
8th → 0	Maybelline	$13,563,197	↘ -16%	↗ 49%
9th ↗ 1	Lancôme	$12,083,559	↘ -23%	↗ 67%
10th ↘ 4	NYX Professional Makeup	$11,445,810	↘ -35%	↘ -2%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for Europe Beauty

*Circle size denotes brand community size

Frequency: Posts/Ambassador (y-axis): 2.0, 2.5, 3.0, 3.5, 4.0
Potency: EMV/Ambassador (x-axis): $4.0k, $6.0k, $8.0k, $10k, $12k, $14k

Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Charlotte Tilbury	2,952	2.5	$6,815
Dior (Beauty)	1,777	2.7	$10,869
L'Oréal Paris	1,894	2.5	$9,847
Rare Beauty	1,223	3.1	$13,171
MAC	2,320	2.4	$6,252
ghd	1,334	3.9	$10,356
Fenty Beauty	1,753	2.3	$7,870
Maybelline	1,462	2.3	$9,277
Lancôme	1,330	3.2	$9,085
NYX Professional Makeup	1,451	2.5	$7,888

Top 10 Beauty Brands in the UK

Rank	Brand	April 2023 EMV		MoM		YoY
1st → 0	Charlotte Tilbury	$13,373,741	⬛	↘ −16%	↘	−13%
2nd ↗ 3	Rare Beauty	$10,501,200	⬛	↗ 6%	↗	130%
3rd → 0	MAC	$9,090,223	⬛	↘ −22%	↘	−4%
4th ↗ 4	Fenty Beauty	$8,600,938	⬛	↗ 12%	↗	26%
5th ↗ 4	Dior (Beauty)	$8,447,662	⬛	↗ 16%	↗	91%
6th ↘ 2	NARS	$8,275,807	⬛	↘ −19%	↘	−28%
7th ●	Maybelline	$6,711,256	⬛	↗ 11%	↗	77%
8th ↗ 2	Huda Beauty	$6,464,668	⬛	↘ −10%	↘	−14%
9th ↘ 2	NYX Professional Makeup	$6,435,755	⬛	↘ −24%	↗	16%
10th ↘ 8	L'Oréal Paris	$6,210,371	⬛	↘ −49%	↗	34%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for UK Beauty Brands

*Circle size denotes brand community size

Frequency: Posts/Ambassador (y-axis)
Potency: EMV/Ambassador (x-axis)
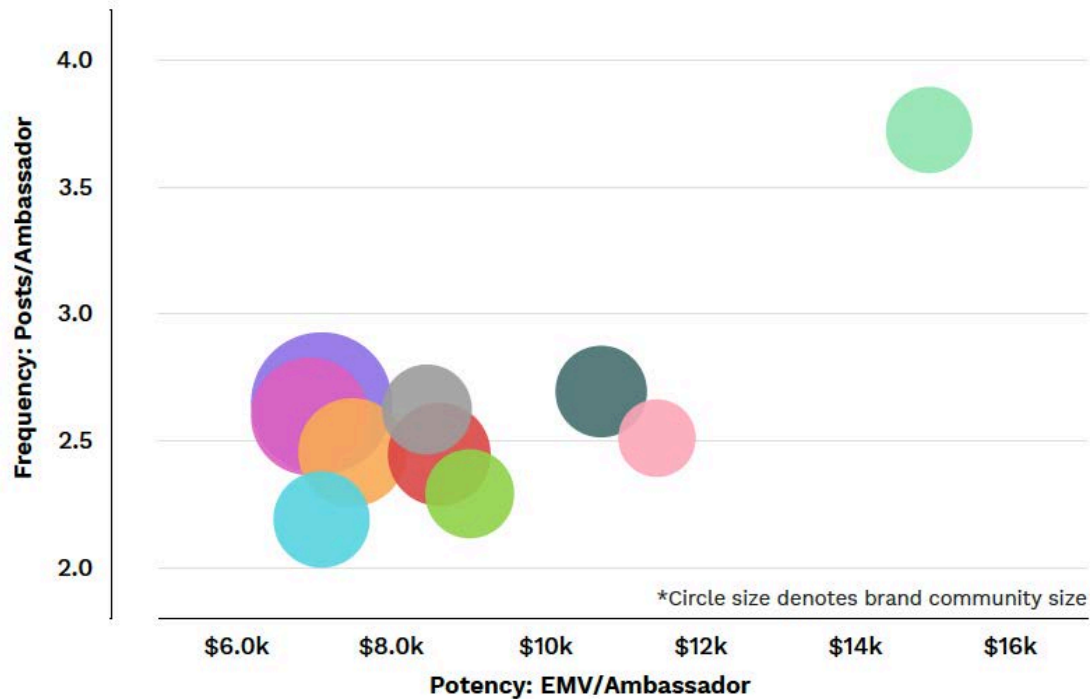
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Charlotte Tilbury	1,882	2.6	$7,106
Rare Beauty	702	3.7	$14,959
MAC	1,307	2.6	$6,955
Fenty Beauty	997	2.4	$8,627
Dior (Beauty)	788	2.7	$10,720
NARS	1,103	2.5	$7,503
Maybelline	744	2.3	$9,021
Huda Beauty	565	2.5	$11,442
NYX Professional Makeup	760	2.6	$8,468
L'Oréal Paris	874	2.2	$7,106

Top 10 Beauty Brands in France

Rank	Brand	April 2023 EMV		MoM		YoY
1st → 0	L'Oréal Paris	$4,110,129	↘	-31%	↗	48%
2nd ↗ 1	Rare Beauty	$3,735,916	↘	-2%	↗	509%
3rd ↗ 4	Lancôme	$3,196,518	↗	9%	↗	144%
4th ↘ 2	Maybelline	$3,033,750	↘	-28%	↗	68%
5th ↗ 4	Dior (Beauty)	$2,744,306	↘	-1%	↗	8%
6th ●	Armani (Beauty)	$2,722,574	↗	57%	↗	183%
7th ↘ 3	Charlotte Tilbury	$2,462,019	↘	-35%	↗	8%
8th → 0	Fenty Beauty	$2,296,194	↘	-21%	↗	25%
9th ↘ 4	NYX Professional Makeup	$1,900,116	↘	-38%	↘	-26%
10th ●	YSL (Beauty)	$1,827,808	↗	46%	↗	160%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for France Beauty Brands

*Circle size denotes brand community size
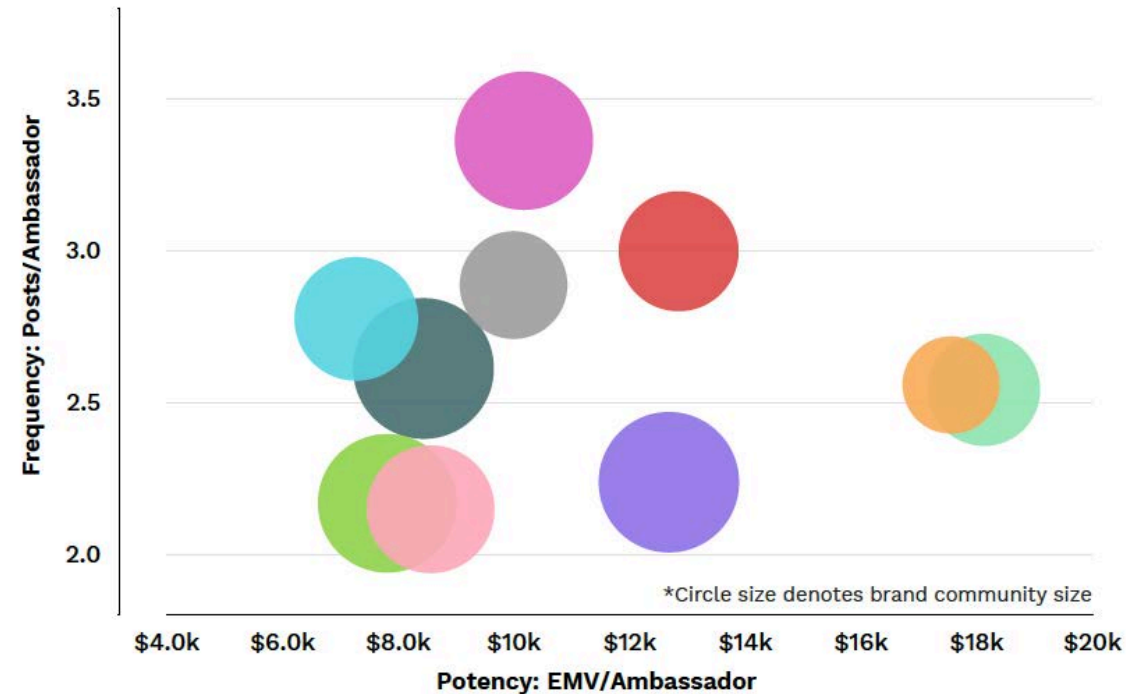
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
L'Oréal Paris	324	2.2	$12,686
Rare Beauty	206	2.5	$18,136
Lancôme	314	3.4	$10,180
Maybelline	236	3.0	$12,855
Dior (Beauty)	325	2.6	$8,444
Armani (Beauty)	155	2.6	$17,565
Charlotte Tilbury	315	2.2	$7,816
Fenty Beauty	268	2.1	$8,568
NYX Professional Makeup	190	2.9	$10,001
YSL (Beauty)	251	2.8	$7,282

Brand Highlights

A Closer Look at Beauty in Europe, the UK, and France

Europe

Brand:
Fenty Beauty

Highlight:
Community

In an overall tough month for Top 10 beauty brands, Fenty Beauty boasted the greatest growth, collecting $13.8M EMV and landing at No. 7. The brand's 10% month-over-month increase was due in part to the retention of its powerful roster of creators, including TikTok makeup guru Charlotte Barker (@charbarker), who ranked as the brand's most impactful creator with $332.0k EMV—a 101% MoM increase. Fenty Beauty also benefited from a notable uptick in post volume, which swelled by 13% MoM to 4.0k mentions, just behind competitor Lancôme's 4.3k mentions.

UK

Brand:
Kylie Cosmetics

Highlight:
Product

Outside the U.K. Top 10, Kylie Cosmetics soared in April, growing by 70% MoM thanks to the successful launch of its new Kylash Volume Mascara. The mascara was all creators could talk about, with #Kylash ranking as one of the brand's most impactful hashtags, generating $696.9k EMV from 31 creators. High-profile U.K. beauty creators like Ling Tang (@ling.kt on Instagram) flocked to try the new product, offering glowing reviews. As a result, Kylie Cosmetics raked in $3.0M EMV.

France

Brand:
Armani
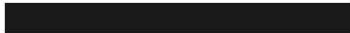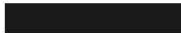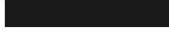
Highlight:
Community

An Italian brand won in France, with Armani closing out April with an impressive $2.7M EMV. The brand's 57% MoM increase was the result of a substantial increase in creator potency, which spiked by 82% MoM. Armani creators averaged $17.6k EMV—the greatest rate among Top 10 competitors. Despite its community size being roughly two-thirds below other Top 10 competitors, Armani landed at No. 6 by EMV, just behind Dior. Armani also benefited from a 13% MoM increase in posting activity among its community, with creators averaging 2.6 posts each.
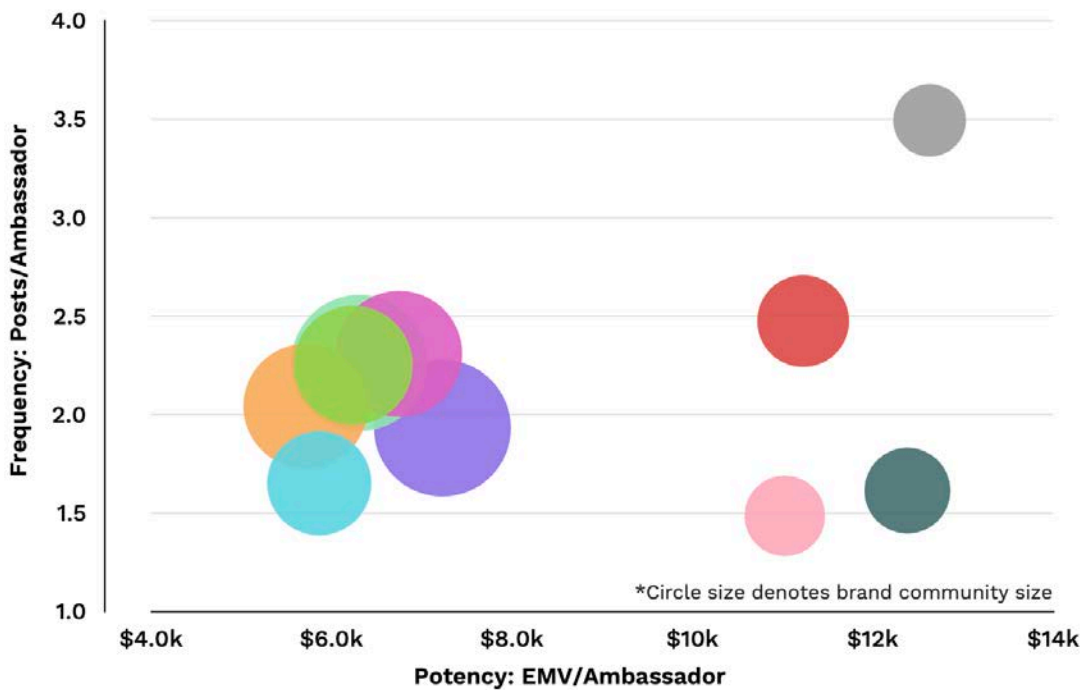
Top 10 Skincare Brands in Europe

Rank	Brand	April 2023 EMV		MoM	YoY
1st ↗ 1	La Roche-Posay	$5,309,190		↘ -11%	↗ 82%
2nd ●	Caudalie	$4,610,145		↗ 95%	↗ 92%
3rd ↗ 3	Elemis	$4,206,934		↘ -11%	↗ 134%
4th ↘ 1	Nivea	$3,717,886		↘ -32%	↗ 21%
5th → 0	L'Oréal Paris (Skincare)	$3,592,409		↘ -29%	↗ 46%
6th ↗ 1	Kiehl's	$3,476,124		↘ -22%	↗ 85%
7th ↗ 1	Drunk Elephant	$3,459,717		↗ 5%	↗ 65%
8th ↗ 1	Garnier (Skincare)	$2,812,474		↘ -3%	↗ 97%
9th ↘ 8	Yepoda	$2,627,799		↘ -57%	↗ 14%
10th ●	Sol De Janeiro	$2,499,630		↗ 17%	↗ 311%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for Europe Skincare Brands

*Circle size denotes brand community size

Axes: Frequency: Posts/Ambassador (y-axis) vs Potency: EMV/Ambassador (x-axis)

Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
La Roche-Posay	734	1.9	$7,233
Caudalie	730	2.3	$6,315
Elemis	623	2.3	$6,753
Nivea	331	2.5	$11,232
L'Oréal Paris (Skincare)	290	1.6	$12,388
Kiehl's	608	2.0	$5,717
Drunk Elephant	554	2.2	$6,245
Garnier (Skincare)	255	1.5	$11,029
Yepoda	208	3.5	$12,634
Sol De Janeiro	426	1.6	$5,868

Top 10 Skincare Brands in the UK

Rank	Brand	April 2023 EMV		MoM		YoY	
1st → 0	Elemis	$3,601,234	▬▬▬	↘	-17%	↗	129%
2nd ↗ 2	Drunk Elephant	$2,093,394	▬▬	↘	-10%	↗	328%
3rd ↗ 2	Tatcha	$2,082,599	▬▬	↗	6%	↗	405%
4th ●	Dior (Skincare)	$1,775,588	▬	↗	98%	↗	334%
5th ↗ 1	La Roche-Posay	$1,672,618	▬	↘	-5%	↗	46%
6th ↘ 4	L'Oréal Paris (Skincare)	$1,627,110	▬	↘	-38%	↗	293%
7th ↗ 2	REN Skincare	$1,599,281	▬	↗	13%	↘	-17%
8th ●	Summer Fridays	$1,532,477	▬	↗	45%	↗	222%
9th ↘ 1	Glow Recipe	$1,519,302	▬	↗	6%	↘	-15%
10th ↘ 3	The Inkey List	$1,511,540	▬	↘	-2%	↗	40%

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

Tribe Dynamics
A CreatorIQ Company © 2023 Tribe Dynamics
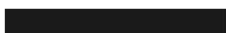
Top 10: Community Metrics

Community Size, Frequency, and Potency for UK Skincare Brands

*Circle size denotes brand community size
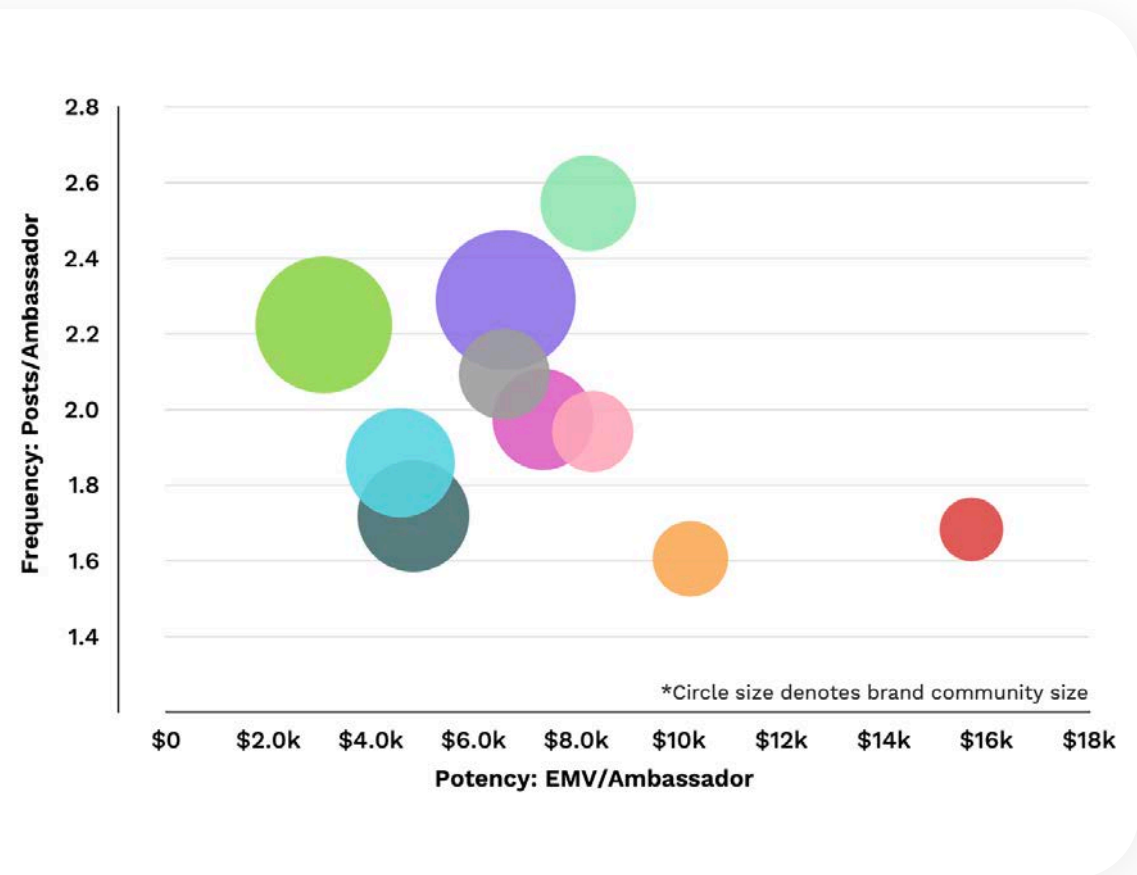
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Elemis	543	2.3	$6,632
Drunk Elephant	254	2.5	$8,242
Tatcha	283	2.0	$7,359
Dior (Skincare)	113	1.7	$15,713
La Roche-Posay	346	1.7	$4,834
L'Oréal Paris (Skincare)	159	1.6	$10,233
REN Skincare	518	2.2	$3,087
Summer Fridays	184	1.9	$8,329
Glow Recipe	230	2.1	$6,606
The Inkey List	330	1.9	$4,580

Tribe Dynamics

Top 10 Skincare Brands in France

Rank	Brand	April 2023 EMV		MoM		YoY
1st ↗ 7	Caudalie	$1,573,099		↗ 67%	↗	130%
2nd ↗ 1	Typology	$1,232,477		↘ -6%	↗	36%
3rd ↗ 7	Erborian	$1,223,240		↗ 69%	↗	48%
4th ●	Sol De Janeiro	$1,157,926		↗ 383%	↗	5,586%
5th ↘ 4	La Roche-Posay	$1,016,795		↘ -38%	↗	55%
6th → 0	L'Occitane en Provence	$789,224		↘ -19%	↗	28%
7th → 0	L'Oréal Paris (Skincare)	$700,587		↘ -26%	↗	30%
8th ●	Lancôme (Skincare)	$670,862		↗ 151%	↗	120%
9th ↘ 7	Nivea	$644,014		↘ -53%	↗	98%
10th ●	Sanoflore	$641,930		↗ 705%	↗	52%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for France Skincare Brands

*Circle size denotes brand community size

Frequency: Posts/Ambassador (y-axis)
Potency: EMV/Ambassador (x-axis)
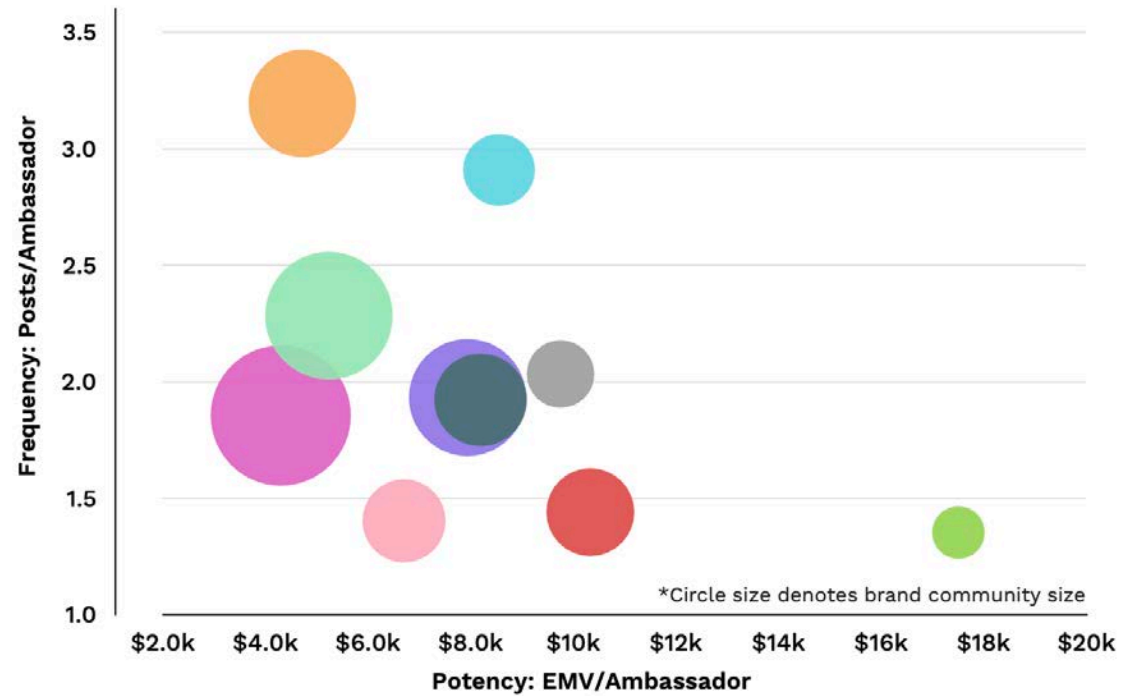
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Caudalie	198	1.9	$7,945
Typology	235	2.3	$5,245
Erborian	284	1.9	$4,307
Sol De Janeiro	112	1.4	$10,339
La Roche-Posay	124	1.9	$8,200
L'Occitane en Provence	167	3.2	$4,726
L'Oréal Paris (Skincare)	40	1.4	$17,515
Lancôme (Skincare)	100	1.4	$6,709
Nivea	66	2.0	$9,758
Sanoflore	75	2.9	$8,559

Brand Highlights

A Closer Look at Skincare in Europe, the UK, and France

Europe

Brand:
Drunk Elephant

Highlight:
Community

Viral skincare brand Drunk Elephant climbed the Top 10 this month, landing in the No. 7 spot with a noteworthy $3.5M EMV. The brand's popular Protini Polypeptide Cream continued to draw the attention of #SkinTok creators like Zania Ahmed (@ zainaaaaa_____ on Instagram) and Jessica Evans (@_makeupbyjessevansx), who posted about the formula in #GRWM (get ready with me) content. The moisturizer continues to be a top EMV-driver for the brand, powering an impressive $444.1k. Meanwhile, the brand also released a new A-Shaba Complex Eye Serum, which secured reviews from creators likeSteven Taylor (@skincaresteve). Drunk Elephant wrapped up April with 1.2k mentions.

UK

Brand:
Dior Skincare

Highlight:
Campaign

Luxury skincare brand Dior secured the No. 4 spot in this month's Top 10, netting $1.8M EMV and a significant 101% MoM spike. The brand partnered with the Royal Scotsman to offer a unique "spa on rails" experience aboard the Belmond Train (@belmondroyalscotsman on Instagram), where guests enjoyed a variety of tailor-made treatments featuring Dior's skincare range with a view of the Scottish Highlands. Nutritionist Rose Ferguson (@rosemaryferguson___) and actress Suki Waterhouse (@sukiwaterhouse) hosted the campaign kickoff, powering nearly $150.0k EMV for Dior via content tagged #DiorSpa, which has amassed 4.4M views on TikTok to date. In all, this activity fueled a surge in the brand's average potency, which reached a whopping $16.0k EMV per creator.

France

Brand:
Lancôme

Highlight:
Campaign

Veteran skincare brand Lancôme enjoyed a prosperous month, collecting $671.5k EMV—an astronomical 151% MoM surge. The brand generated awareness around its Advanced Génifique and Rénergie H.C.F Triple Serum formulas by hosting content creators for "The Open Lab" event in Chevilly-Larue, France. Home to Lancôme's laboratories, creators enjoyed an educational experience with the brand's scientific director, exploring product formulations and taking part in interactive workshops. Lancôme ultimately attracted mentions from French brand fans like Lydia Gasperoni (@lydiagasperoni on Instagram) and Vanessa (@mlle_zaza), contributing to the brand's average potency of $6.7k per creator.

Top 10 Luxury Fashion Brands in the US

Rank	Brand	April 2023 EMV		MoM		YoY	
1st ↗ 1	Chanel (Fashion)	$30,736,995	▓▓▓▓▓▓▓▓	↘	-14%	↗	10%
2nd ↗ 1	Louis Vuitton	$25,201,470	▓▓▓▓▓▓	↘	-27%	↘	-1%
3rd ↗ 1	Dior (Fashion)	$23,842,333	▓▓▓▓▓	↘	-24%	↘	-18%
4th ↗ 3	Gucci (Fashion)	$23,058,889	▓▓▓▓▓	↘	-15%	↘	-20%
5th ↗ 3	Prada	$19,252,463	▓▓▓▓	↘	-19%	↘	-21%
6th ●	Tiffany & Co.	$19,215,746	▓▓▓▓	↗	26%	↗	149%
7th ●	Rolex	$17,107,442	▓▓▓	↗	76%	↗	22%
8th ↘ 2	Valentino	$16,011,752	▓▓▓	↘	-42%	↘	-29%
9th ↘ 4	Saint Laurent (YSL) (Fashion)	$14,737,715	▓▓▓	↘	-49%	↘	-22%
10th ↘ 9	Versace	$13,781,079	▓▓▓	↘	-64%	↘	-35%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Luxury Fashion Brands

*Circle size denotes brand community size

Frequency: Posts/Ambassador (y-axis, 1.0 to 5.0)
Potency: EMV/Ambassador (x-axis, $0 to $35k)
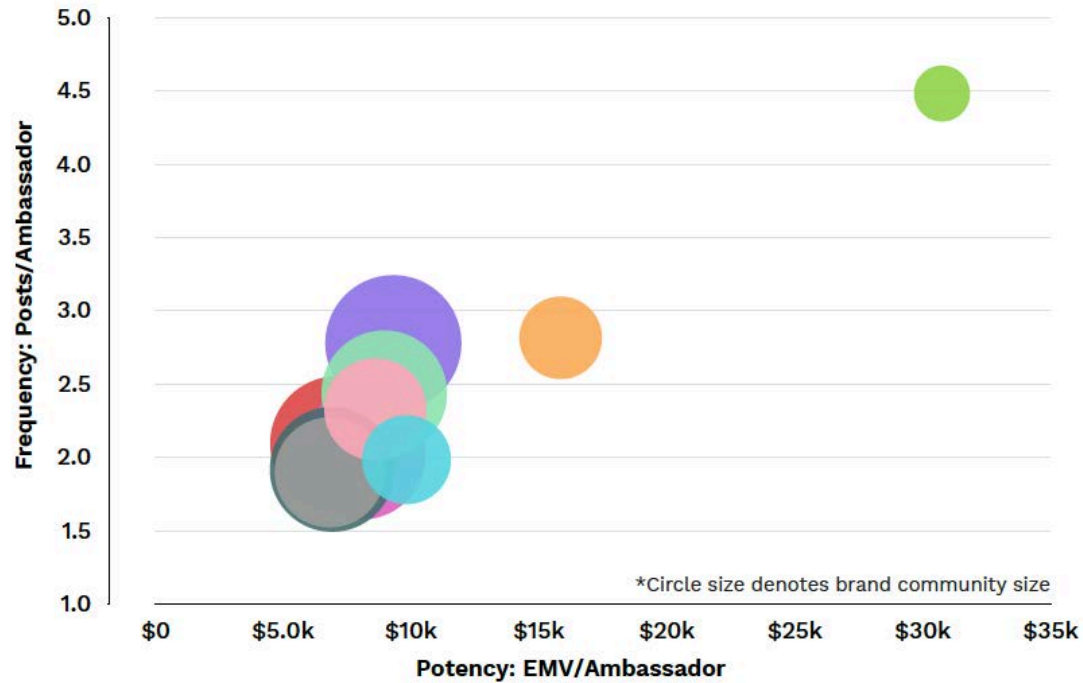
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Chanel (Fashion)	3,295	2.8	$9,328
Louis Vuitton	2,809	2.4	$8,972
Dior (Fashion)	2,955	2.0	$8,068
Gucci (Fashion)	3,227	2.1	$7,146
Prada	2,774	1.9	$6,940
Tiffany & Co.	1,211	2.8	$15,868
Rolex	556	4.5	$30,769
Valentino	1,857	2.3	$8,622
Saint Laurent (YSL) (Fashion)	2,153	1.9	$6,845
Versace	1,400	2.0	$9,844

Brand Highlights

A Closer Look at US Luxury Fashion

Brand:
Rolex

ROLEX

Highlight:
Event

Breaking into the Top 10 in spectacular fashion, Rolex landed at No. 7 thanks to its annual tennis tournament, the Rolex Monte-Carlo Masters The tournament was attended by high-profile names in sports, including Formula 1 drivers Charles Leclerc (charles_leclerc on Instagram) and Pierre Gasly (@pierregasly), which only added to the tournament's. However, tennis broadcasting company Tennis TV (@tennistv) proved Rolex's most impactful advocate, with the brand generating $5.4M EMV across a prolific 410 mentions. As a result, Rolex achieved one of its highest-earning months this year, collecting $17.1M EMV, a 76% month-over-month increase.

Brand:
Fear of God

FEAR OF GOD

Highlight:
Event

Independent luxury fashion brand Fear of God enjoyed a productive month, growing by 522% MoM and generating $8.6M EMV, putting them within striking distance of competitor Dolce & Gabbana ($9.2M). Fear of God achieved its notable success thanks in part to Kanye West's surprise attendance at the brand's inaugural runway show at the Hollywood Bowl. Organic buzz surrounding the controversial rapper boosted #KanyeWest and #Ye to rank among the brand's top three most impactful hashtags, collectively driving $455.9k EMV. However, fashion enthusiasts also responded positively to Fear of God founder Jerry Lorenzo's fireside chat describing the brand's eighth collection, with #JerryLorenzo generating $181.7k EMV across 58 mentions.

Brand:
Emilio Pucci

EMILIO PUCCI

Highlight:
Community

Emilio Pucci soared in April, growing by 166% MoM and collecting $2.0M EMV. Key to the brand's success was a focus on expanding its community with impactful new partnerships, which saw creator potency spike by a notable 99% MoM to an average of $11.6k EMV per creator. Emilio Pucci's most productive new partnership was with rapper Flo Milli (@flomillishit on Instagram), who performed at Coachella wearing a stunning outfit from the luxury fashion house. Flo Milli mentioned Emilio Pucci 27 times, helping the brand to $671.9k EMV and ranking as its most impactful creator by a wide margin.

Top 10 Apparel Brands in the US

Rank	Brand	April 2023 EMV		MoM	YoY
1st → 0	Fashion Nova	$114,112,570		↘ -10%	↘ -8%
2nd → 0	Nike	$75,814,648		↘ -10%	↗ 10%
3rd → 0	Zara	$42,604,214		↘ -12%	↘ -21%
4th → 0	SHEIN	$39,968,279		→ 0%	↘ -30%
5th → 0	Adidas	$32,348,878		↘ -2%	↗ 25%
6th ↗ 1	H&M	$29,187,693		↗ 10%	↘ -8%
7th ↗ 1	Gymshark	$25,908,515		↘ -1%	↘ -18%
8th ↘ 2	Alo Yoga	$22,991,376		↘ -16%	↘ -19%
9th ↗ 1	Skims	$22,629,387		↘ -2%	↗ 13%
10th ●	Free People	$19,718,251		↗ 10%	↗ 52%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Apparel Brands

*Circle size denotes brand community size
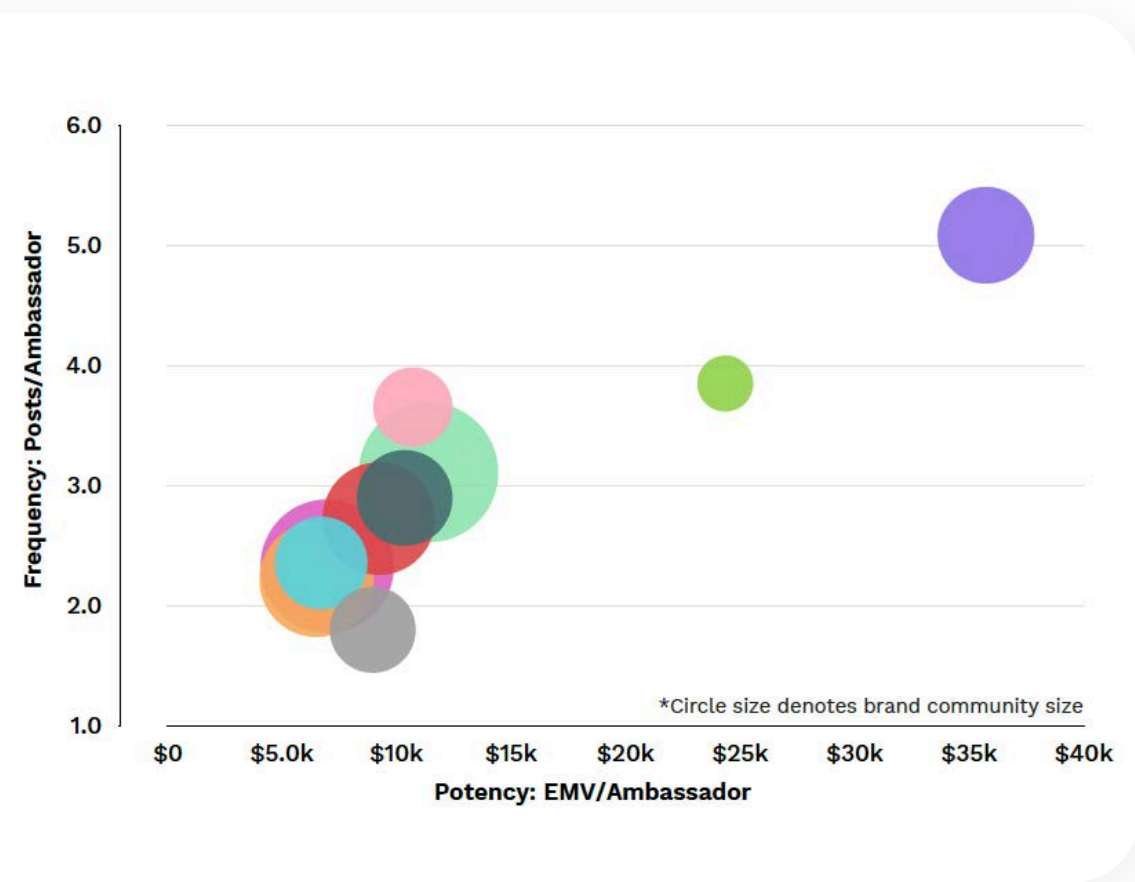
Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
● Fashion Nova	3,192	5.1	$35,750
● Nike	6,636	3.1	$11,425
● Zara	6,086	2.3	$7,000
● SHEIN	4,319	2.7	$9,254
● Adidas	3,116	2.9	$10,382
● H&M	4,464	2.2	$6,538
● Gymshark	1,063	3.8	$24,373
● Alo Yoga	2,141	3.6	$10,739
● Skims	2,518	1.8	$8,987
● Free People	2,926	2.4	$6,739

Tribe Dynamics

A CreatorIQ Company Q © 2023 Tribe Dynamics

Brand Highlights

A Closer Look at US Apparel

Brand:

Guess

GUESS

Highlight:

Event

It was a tough month for the U.S. Apparel Top 10, with only a few brands boasting growth. However, outside the Top 10, LA-based fashion brand Guess made a splash by partnering with creators at America's most popular music festival, Coachella. Guess curated a Coachella experience for its most impactful creator, TikTok star Alix Earle (@alixearle), setting her and her friends up with a gorgeous place to stay and a personal stylist to curate her Guess-centric festival looks. Alix came in as the brand's top EMV-driver, generating $636.7k across 16 mentions. Guess closed the month with $9.6M EMV, a 101% month-over-month increase.

Brand:

Quay

QUAY

Highlight:

Community

Australian eyewear brand Quay grew by an impressive 59% MoM, collecting $2.6M EMV. Key to Quay's success was a healthy expansion of its creator community, which grew by a parallel 38% MoM, swelling to 631 creators. Incoming creators were responsible for a notable 73% ($1.9M EMV) of the brand's monthly total, with micro-influencers proving particularly impactful and driving $473.3M EMV. Quay also benefited from a continued partnership with Paris Hilton (@parishilton on Instagram), whose two mentions, including a Coachella look, garnered 797.6k likes and drove $246.9k EMV.

Brand:

New Era Cap

NEW ERA

Highlight:

Event

New Era Cap exploded up the rankings thanks to hype surrounding the 2023 NFL Draft. Top football prospects around the country spent the last week of April with their families as they awaited calls from NFL's teams and donned New Era baseball caps. As a result, #NFLDraft ranked as the brand's most impactful hashtag in April, generating $974.6k EMV via 44 posts from nine creators. Also among New Era Cap's top hashtags were #FlyEaglesFly, #WeAreTexans, #ChiefsKingdom, and #Seahawks, which collectively contributed $283.7k EMV. In all, New Era Cap collected $2.2M EMV, a 163% MoM increase.

EMV

What Is EMV?

Earned Media Value, or EMV, quantifies 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 platform it was published on and 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.

Posts by:
- Influencers
- Brands
- Retailers
- Publications

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

On Platforms including:
- Instagram
- YouTube
- Facebook
- Twitter
- TikTok
- Pinterest
- Blogs

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

EMV Retention
The proportion of EMV from loyal influencers who continue to post about your brand from one time period to the next. EMV retention is calculated by taking the amount of EMV generated in a given time period by influencers who also mentioned your brand in the corresponding previous time period, and then dividing that figure by your brand's total EMV in the corresponding previous time period.

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