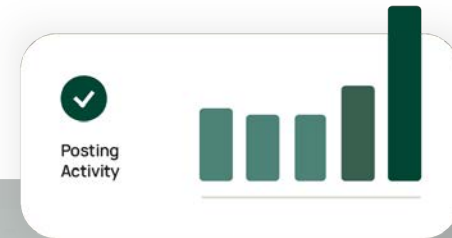


The Tribe Top 10

Beauty and Fashion Rankings: Social Media's Top Brands

March 2023 US Beauty, Fashion, & EMEA Beauty



@iloveglassesstoo
\$22.5k EMV
452.5k Impressions

Tribe Dynamics
A CreatorIQ Company



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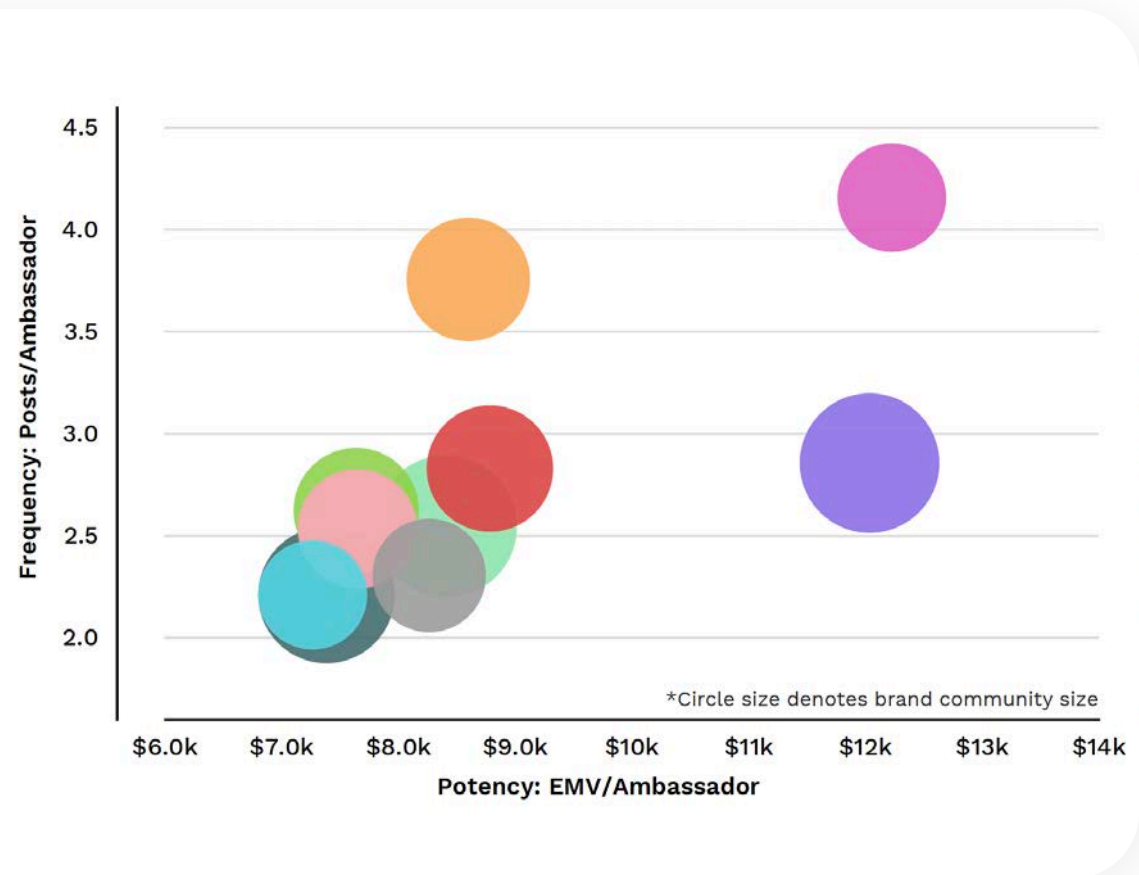


Top 10 Cosmetics Brands in the US

Rank	Brand	March 2023 EMV	MoM	YoY
1st ↗ 2	Rare Beauty	\$56,906,328	↗ 36%	↗ 133%
2nd → 0	Charlotte Tilbury	\$41,079,198	↘ -10%	↗ 11%
3rd ↗ 1	ColourPop	\$35,036,778	↘ -9%	↘ -20%
4th ↗ 4	NYX Professional Makeup	\$34,075,537	↗ 17%	↗ 17%
5th ↘ 4	Fenty Beauty	\$33,320,941	↘ -28%	↗ 3%
6th ↘ 1	Benefit	\$31,834,116	↘ -2%	↗ 28%
7th ↘ 1	MAC	\$29,100,163	↘ -4%	↘ -12%
8th ↘ 1	E.L.F.	\$26,337,802	↘ -11%	↗ 21%
9th → 0	Dior (Cosmetics)	\$25,734,846	↘ -6%	↗ 2%
10th → 0	NARS	\$20,997,864	↘ -21%	↘ -26%

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Cosmetics Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Rare Beauty	4,727	2.9	\$12,039
Charlotte Tilbury	4,884	2.5	\$8,411
ColourPop	2,865	4.2	\$12,229
NYX Professional Makeup	3,878	2.8	\$8,787
Fenty Beauty	4,511	2.2	\$7,387
Benefit	3,701	3.8	\$8,601
MAC	3,808	2.6	\$7,642
E.L.F.	3,442	2.5	\$7,652
Dior (Cosmetics)	3,113	2.3	\$8,267
NARS	2,889	2.2	\$7,268

Brand Highlights

A Closer Look at US Cosmetics

Brand:

Saie

saie

Highlight:

Product

At the helm of Saie's surge to \$11.3M EMV was the magic of its Sun Melt Cream-Balm Bronzer and Glow Super Gel. These products fueled \$1.4M and \$1.0M EMV, respectively, corresponding with a 90% month-over-month increase in content volume. A total of 1.8k creators—up 46% from the previous month—raved about the clean makeup brand in 4.9k pieces of content. Kali Ledger (@kali.ledger on Instagram) and Mary Sher (@marysherb), the brand's most impactful beauty creators, drove \$347.6k and \$324.9k EMV, respectively, showing fans how to achieve various glowy looks. In all, Saie enjoyed a staggering 230% year-over-year EMV growth.

Brand:

Winky Lux

WINKY LUX

Highlight:

Creator

A clean makeup fave, Winky Lux emphasizes "joyful beauty," an approach that powered \$3.9M EMV. The brand amplified its partnership with social media star Kesley LeRoy (kesleyjade on YouTube), who fueled \$2.3M EMV, or 58% of Winky Lux's monthly total. Tagging the brand in 52 pieces of content using #KesleyJade, Kesley drove 80% more EMV than her \$1.3M total for the brand in February. Kesley frequently tagged Winky Lux in viral dance content, featuring siblings from the popular LeRoy family. Overall, Winky Lux enjoyed an 85% MoM EMV growth and a 250% YoY EMV expansion.

Brand:

UOMA Beauty






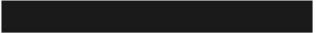


































UOMA
BEAUTY

Highlight:

Activation

The star of the show for Black-owned UOMA Beauty was its Salute to the Sun Collection, which fueled \$806.7k EMV and inspired 246 creators to share their enthusiasm. Behind this commotion was BoxyCharm (@boxycharm on Instagram), which included a mascara from UOMA Beauty's Salute to the Sun Collection in its latest subscription box. #BoxyCharm powered \$875.4k EMV, 32% of the brand's monthly total. Makeup artists like Mariale Marrero (@mariale) showed fans how to recreate a Dua Lipa look using items from the box (\$129.1k EMV). Meanwhile beauty creator and No. 1 overall EMV-driver Celine Bernaerts (@celine_bernaerts) included the brand in a Mariah Carey-themed avant-garde look, inspiring \$407.8k. In all, UOMA Beauty accrued \$2.8M EMV, up 72% from February.

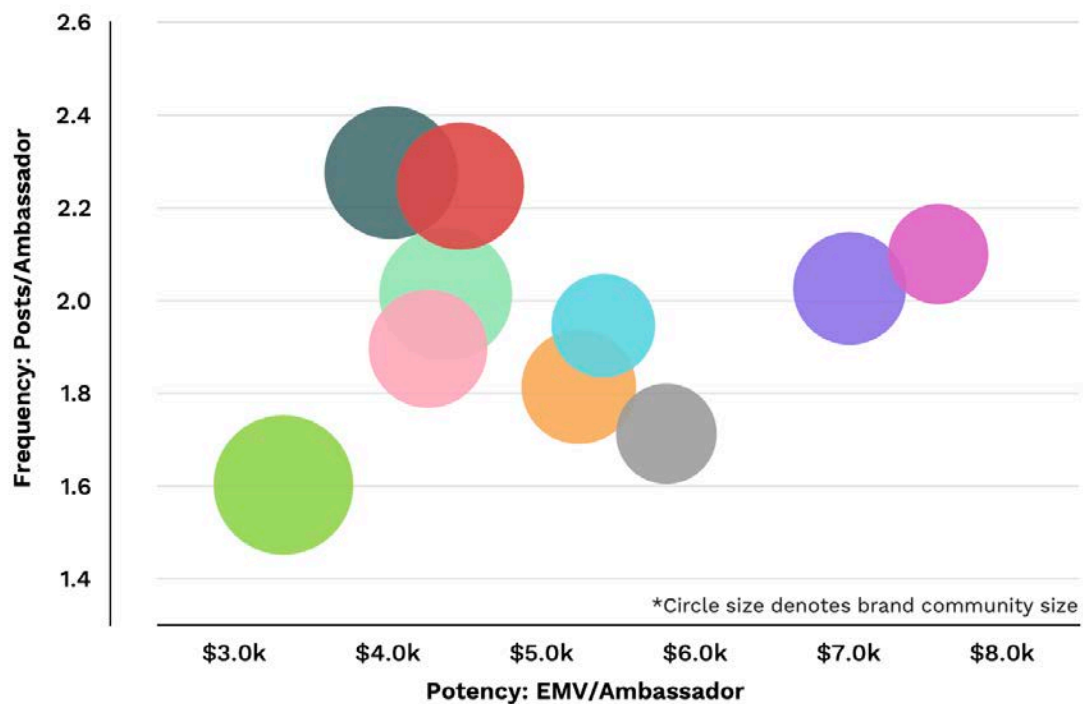
Top 10 Skincare Brands in the US

Rank	Brand	March 2023 EMV	MoM	YoY
1st  3	Elemis	\$8,817,620 	 24%	 313%
2nd  1	Drunk Elephant	\$7,623,089 	 -18%	 47%
3rd  1	CeraVe	\$7,532,977 	 -18%	 37%
4th  1	Glow Recipe	\$7,161,794 	 -21%	 -26%
5th 	Summer Fridays	\$7,036,263 	 51%	 12%
6th  3	La Roche-Posay	\$6,797,413 	 30%	 26%
7th  1	Kiehl's	\$6,385,279 	 8%	 102%
8th  3	Laneige	\$5,909,418 	 -1%	 62%
9th 	Sol De Janeiro	\$5,797,792 	 31%	 111%
10th  2	Tatcha	\$5,744,935 	 8%	 6%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Skincare Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Eleemis	1,258	2.0	\$7,009
Drunk Elephant	1,741	2.0	\$4,379
CeraVe	993	2.1	\$7,586
Glow Recipe	1,601	2.2	\$4,473
Summer Fridays	1,749	2.3	\$4,023
La Roche-Posay	1,296	1.8	\$5,245
Kiehl's	1,922	1.6	\$3,322
Laneige	1,386	1.9	\$4,264
Sol De Janeiro	997	1.7	\$5,815
Tatcha	1,063	1.9	\$5,404

Brand Highlights

A Closer Look at US Skincare

Brand:

Elemis

ELEMIS
LONDON

Highlight:

Community

Elemis climbed the Top 10 this month, securing the No. 1 spot thanks to an impressive \$8.8M EMV and 24% month-over-month improvement. The #SkinTok-favorite brand partnered with new content creators in March, including Mariale Marrero (@mar.hacks on TikTok), Olivia Yang (@olaffee), and Shima Katouzian (@herosheemaz on Instagram), who collectively powered \$865.4k EMV for the brand. This incoming cohort also authored a series of #GRWM (get ready with me) content tagged #ElemisPartner, which has amassed 134.8M TikTok views to-date. In all, this activity fueled a corresponding 28% MoM increase in Elemis' potency, with creators averaging a noteworthy \$7.0k EMV each.

Brand:

Summer Fridays

**S U M M E R
F R I D A Y S**

Highlight:

Product Launch

Trendy skincare brand Summer Fridays returned to the Top 10 this month, coming in at No. 5 with \$7.0M EMV and a 51% MoM gain. The brand welcomed 1.7k new brand fans in March, including Helen Liao (@thruhelenslens on Instagram) and Ana Gonzalez (@isabelanago on TikTok). This expanded community was due in part to the unveiling of two new shades of Summer Fridays' top-selling Lip Butter Balm. A 42% MoM network expansion also resulted in an increase in content volume, which spiked to 4.0k mentions—an 88% MoM surge. Meanwhile, Summer Fridays stirred additional buzz when it launched a week-long Spring sale, which offered a 20% discount on a range of products, including the brand's viral Jet Lag Mask.

Brand:

Ole Henriksen

OLEHENRIKSEN

Highlight:

Campaign

Ole Henriksen enjoyed a prosperous March, collecting \$4.8M EMV—an astronomical 92% MoM increase. The veteran skincare brand celebrated its 40th anniversary this month by hosting a slew of content creators, including Dylan Mulvaney (@dylanmulvaney on TikTok) and Karen Gonzalez (@iluvsarahii on Instagram), for a 3-day "Scandi Skin Wellness Retreat" in Copenhagen, Denmark. Meanwhile, Ole Henriksen continued to expand its Banana Bright range with a new offering: the Banana Bright Mineral Sunscreen SPF 30. This activity ultimately sparked a 64% MoM increase in the brand's potency, with creators averaging \$6.8k EMV each. Ole Henriksen wrapped the month with 1.5k mentions, a noteworthy 44% MoM gain.

Top 10 Haircare Brands in the US

Rank	Brand	March 2023 EMV	MoM	YoY
1st ↑ 1	Redken	\$9,096,968	↑ 4%	↑ 1%
2nd ↓ 1	Olaplex	\$6,526,069	↓ -33%	↓ -38%
3rd → 0	K18 Hair	\$6,142,025	↑ 12%	↑ 27%
4th → 0	Schwarzkopf Professional	\$4,712,072	↑ 4%	↓ -25%
5th ↑ 5	Amika	\$4,588,930	↑ 54%	↑ 9%
6th ↓ 1	Gisou	\$3,823,789	↓ -9%	↑ 61%
7th ↑ 2	Ouai	\$3,789,725	↑ 25%	↓ -7%
8th ↓ 1	Wella	\$3,785,890	↑ 15%	↓ -24%
9th	Kérastase	\$3,773,596	↑ 47%	↑ 17%
10th	Living Proof	\$2,830,173	↑ 14%	↓ -18%

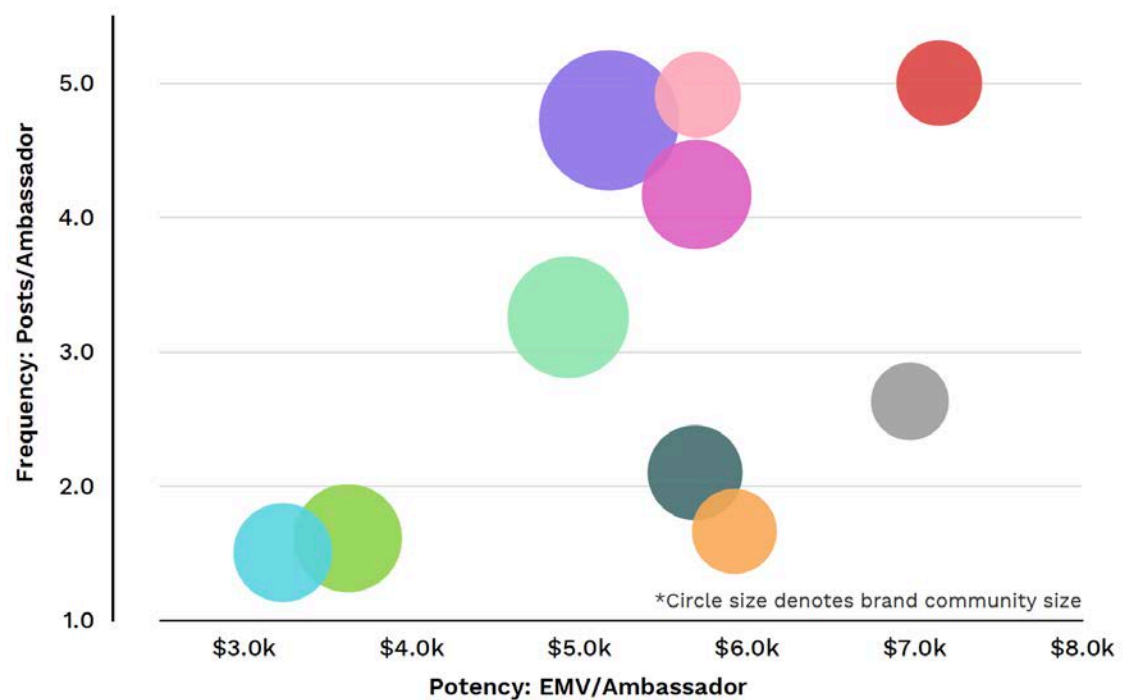
● This brand was not in the previous month's Top 10.

Top 5 Tools, Wigs, & Extensions

	Brand	March 2023 EMV
1st	Dyson (Haircare)	\$8,618,460
2nd	ghd	\$6,416,602
3rd	Framar	\$4,699,157
4th	Bellami	\$2,401,115
5th	BaByliss	\$2,242,424

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Haircare Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Redken	1,756	4.7	\$5,181
Olaplex	1,322	3.3	\$4,937
K18 Hair	1,077	4.2	\$5,703
Schwarzkopf Professional	659	5.0	\$7,150
Amika	806	2.1	\$5,693
Gisou	645	1.7	\$5,928
Ouai	1,046	1.6	\$3,623
Wella	663	4.9	\$5,710
Kérastase	541	2.6	\$6,975
Living Proof	875	1.5	\$3,234

Brand Highlights

A Closer Look at US Haircare

Brand:

Amika

amika:

Highlight:

Product

A clean beauty brand that represents all hair types, Amika climbed the U.S. Haircare leaderboard and claimed the No. 5 spot. Amika accrued \$4.6M EMV, a 54% increase from February, in part due to a surge in activations: #AmikaPartner was the brand's top hashtag, driving \$1.4M EMV, or 30% of Amika's monthly total. The rise in activations centered around its Perk Up Dry Shampoo: the product generated \$1.4M EMV, inspiring 70 brand enthusiasts to show the dry shampoo in action. Among them, Indy Mitchell (@indybelle_) used the TikTok stitch feature to build on a tutorial from Taylor Murphy (@madeandtailored) that featured the product. A brand partner, Indy drove \$175.1k EMV with a single #HairTok post.

Brand:

SheaMoisture

SheaMoisture
ESTABLISHED 1975

Highlight:

Community

Natural haircare staple brand SheaMoisture enjoyed a standout 88% month-over-month EMV growth, netting \$2.0M. Of this total, \$1.6M EMV (77%) was generated by incoming creators —those who shared content about the brand in March, but not the previous month. SheaMoisture experienced a 39% MoM community expansion that corresponded to a 57% boost in content volume. The brand's No. 1 EMV-driver, curly hair expert Barbara DelleMonache (@curlvitality on TikTok), reviewed several curly haircare brands typically found in retail stores. She recommended SheaMoisture's line for followers with thick hair types, inspiring \$108.0k EMV for the brand.

Brand:

L'Oréal Paris
Haircare


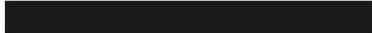



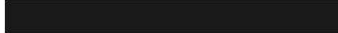













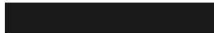



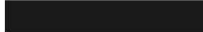



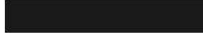



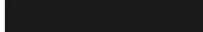






L'ORÉAL
PARIS

Highlight:

Activation

Outside of the Top 10, L'Oréal Paris Haircare boasted a stunning 183% MoM surge. The brand benefitted from activations around core offerings: top-performing product lines Elvive and EverPure Moisture yielded \$473.2k and \$361.8k EMV, respectively. Additionally, #LOrealBondRepair inspired \$519.0k EMV via just 17 creators. Responsible for approximately 17% of L'Oréal Paris Haircare's monthly EMV total, makeup artist Jahanara Rahman (@jahanara.makeup on TikTok) used L'Oréal's haircare products to accentuate a clean girl, glossy look. A brand partner, Jahanara contributed \$282.6k EMV as L'Oréal Paris Haircare's No. 1 earner in March.

Top 10 Beauty Brands in Europe

Rank	Brand	March 2023 EMV	MoM	YoY
1st  3	L'Oréal Paris	\$27,255,764 	 47%	 57%
2nd  1	Charlotte Tilbury	\$24,763,954 	 -10%	 4%
3rd → 0	MAC	\$20,686,328 	 -9%	 -16%
4th  6	Benefit	\$17,639,030 	 48%	 23%
5th → 0	Dior (Beauty)	\$16,932,387 	 -6%	 6%
6th  1	NYX Professional Makeup	\$16,113,615 	 7%	 8%
7th  5	ghd	\$15,520,203 	 -42%	 8%
8th  1	Lancôme	\$14,909,428 	 21%	 41%
9th 	Rare Beauty	\$14,765,086 	 30%	 137%
10th 	Maybelline	\$14,121,037 	 25%	 20%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for Europe Beauty



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
L'Oréal Paris	2,111	3.0	\$12,911
Charlotte Tilbury	3,412	2.8	\$7,258
MAC	2,730	2.7	\$7,577
Benefit	1,963	3.0	\$8,986
Dior (Beauty)	1,958	2.5	\$8,648
NYX Professional Makeup	1,763	2.9	\$9,140
ghd	1,471	4.1	\$10,551
Lancôme	1,505	3.2	\$9,907
Rare Beauty	1,210	2.8	\$12,203
Maybelline	1,496	2.5	\$9,439

Top 10 Beauty Brands in the UK

Rank	Brand	March 2023 EMV	MoM	YoY
1st → 0	Charlotte Tilbury	\$15,354,904	↘ -18%	↘ -1%
2nd ↗ 7	L'Oréal Paris	\$11,239,148	↗ 60%	↗ 112%
3rd → 0	MAC	\$11,030,856	↗ 4%	↘ -12%
4th ↘ 2	NARS	\$9,783,996	↘ -12%	↘ -16%
5th ↗ 1	Rare Beauty	\$9,097,084	↗ 10%	↗ 142%
6th ●	Benefit	\$8,675,194	↗ 24%	↗ 7%
7th ↗ 3	NYX Professional Makeup	\$7,858,781	↗ 12%	↗ 26%
8th ↘ 4	Fenty Beauty	\$7,336,083	↘ -14%	↗ 14%
9th ↘ 2	Huda Beauty	\$6,964,342	↘ -12%	↘ -15%
10th ↘ 5	Dior (Beauty)	\$6,952,534	↘ -17%	↗ 19%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for UK Beauty Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Charlotte Tilbury	2,121	3.0	\$7,239
L'Oréal Paris	1,012	2.8	\$11,106
MAC	1,446	2.8	\$7,629
NARS	1,181	2.7	\$8,285
Rare Beauty	673	3.4	\$13,517
Benefit	885	3.1	\$9,802
NYX Professional Makeup	833	3.1	\$9,434
Fenty Beauty	947	2.2	\$7,747
Huda Beauty	712	2.7	\$9,781
Dior (Beauty)	846	2.5	\$8,218

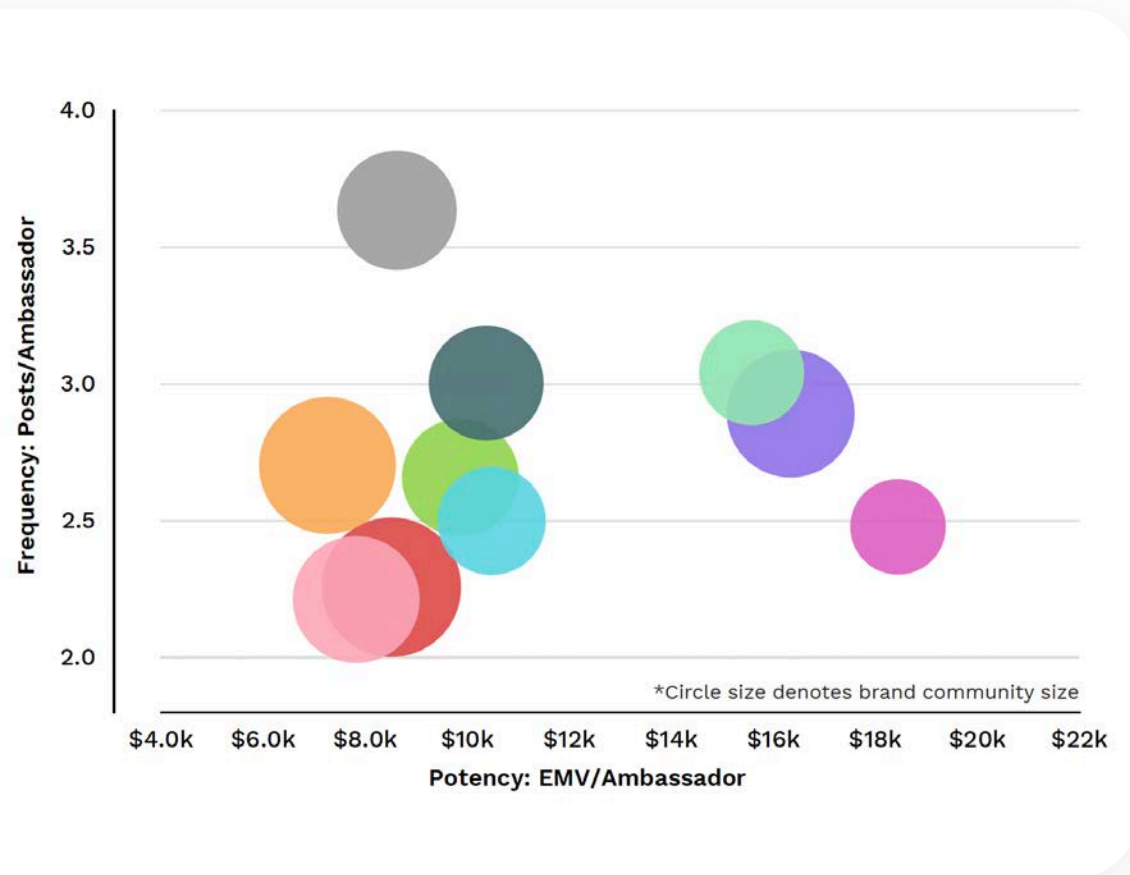
Top 10 Beauty Brands in France

Rank	Brand	March 2023 EMV	MoM	YoY
1st ↗ 5	L'Oréal Paris	\$5,738,071	↗ 107%	↗ 67%
2nd ↗ 5	Maybelline	\$3,693,378	↗ 38%	↗ 75%
3rd ●	Rare Beauty	\$3,616,448	↗ 88%	↗ 401%
4th → 0	Charlotte Tilbury	\$3,561,961	↗ 8%	↗ 30%
5th → 0	NYX Professional Makeup	\$2,937,818	↘ -8%	↘ -14%
6th ↘ 3	MAC	\$2,922,453	↘ -15%	↘ -36%
7th ↗ 1	Lancôme	\$2,892,904	↗ 15%	↗ 68%
8th ↗ 1	Dior (Beauty)	\$2,702,365	↗ 8%	↘ -24%
9th ●	Givenchy (Beauty)	\$2,649,893	↗ 111%	↗ 428%
10th ↘ 9	Fenty Beauty	\$2,642,614	↘ -43%	↘ -14%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for France Beauty Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
L'Oréal Paris	351	2.9	\$16,348
Maybelline	237	3.0	\$15,584
Rare Beauty	196	2.5	\$18,451
Charlotte Tilbury	418	2.3	\$8,521
NYX Professional Makeup	283	3.0	\$10,381
MAC	402	2.7	\$7,270
Lancôme	293	2.7	\$9,873
Dior (Beauty)	345	2.2	\$7,833
Givenchy (Beauty)	307	3.6	\$8,632
Fenty Beauty	252	2.5	\$10,487

Brand Highlights

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

Europe

Brand:

Rare Beauty



Highlight:

Community

Rare Beauty's success can be largely attributed to its focus on community growth. The cosmetics brand, founded by Selena Gomez, broke into the Top 10 this month, landing at No. 9 thanks to a healthy 32% MoM expansion of its community, which swelled to 1.2k creators. In parallel, post volume also increased by 40% MoM, with the brand garnering 3.4k mentions. New powerhouse creators also played an integral role in Rare Beauty's meteoric rise: this community segment generated \$2.5M EMV via 122 brand mentions. Rare Beauty rounded out the month with \$14.8M EMV, a 30% MoM increase.

UK

Brand:

Benefit



Highlight:

Community

Benefit experienced significant growth, breaking into the Top 10 at No. 6 and collecting \$8.7M EMV, a 24% MoM increase. The brand's community growth played a crucial role in its success, with Benefit's community size expanding by 14% MoM. Notably, micro-influencer Klaudia Kang (@klaudiakang on Instagram) proved a valuable addition to Benefit's creator community. Kang generated \$148.9k EMV via three mentions of the brand, making her the brand's most impactful new advocate. Incoming micro-influencers like Kang significantly contributed to Benefit's success, with the community segment accounting for \$776.6k EMV of the brand's monthly total.

France

Brand:

L'Oréal Paris



Highlight:

Event

French cosmetics staple L'Oréal Paris claimed the No. 1 spot, rising ahead of competitor Charlotte Tilbury. L'Oréal Paris' success was primarily due to its impactful partnership with buzzy Lebanese fashion designer Elie Saab at Paris Fashion Week, at which the designer showcased a variety of dazzling new creations styled on models wearing L'Oréal Paris makeup. As a result, #LOrealPFW and #ElieSaab ranked among the brand's top hashtags, collectively contributing \$1.4M EMV via 38 mentions. L'Oréal Paris closed March with an impressive \$5.7M EMV, a 107% MoM increase.

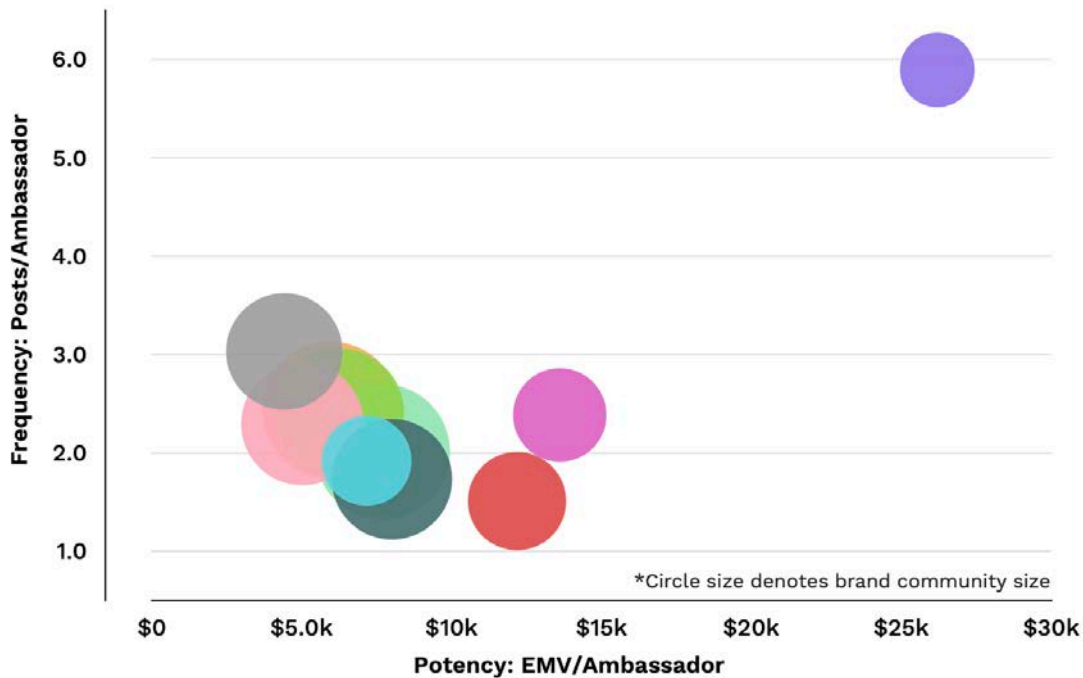
Top 10 Skincare Brands in Europe

Rank	Brand	March 2023 EMV	MoM	YoY
1st ●	Yepoda	\$5,976,905	▲ 192%	▲ 234%
2nd ▲ 2	La Roche-Posay	\$5,705,880	▲ 56%	▲ 89%
3rd ●	Nivea	\$4,835,949	▲ 161%	▲ 84%
4th ▲ 6	L'Oréal Paris (Skincare)	\$4,781,732	▲ 72%	▲ 40%
5th ▼ 3	CeraVe	\$4,720,179	▲ 8%	▲ 101%
6th ▼ 3	Elemis	\$4,525,447	▲ 15%	▲ 133%
7th ▲ 2	Kiehl's	\$4,289,039	▲ 49%	▲ 125%
8th ▼ 7	Drunk Elephant	\$3,066,220	▼ -33%	▲ 177%
9th ●	L'Occitane en Provence	\$2,440,845	▼ -2%	▲ 39%
10th ●	Avène	\$2,355,773	▲ 153%	▲ 27%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for Europe Skincare Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Yepoda	228	5.9	\$26,214
La Roche-Posay	740	2.0	\$7,711
Nivea	355	2.4	\$13,622
L'Oréal Paris (Skincare)	392	1.5	\$12,198
CeraVe	588	1.7	\$8,028
Elemis	756	2.4	\$5,986
Kiehl's	684	2.4	\$6,271
Drunk Elephant	608	2.3	\$5,043
L'Occitane en Provence	550	3.0	\$4,438
Avène	328	1.9	\$7,182

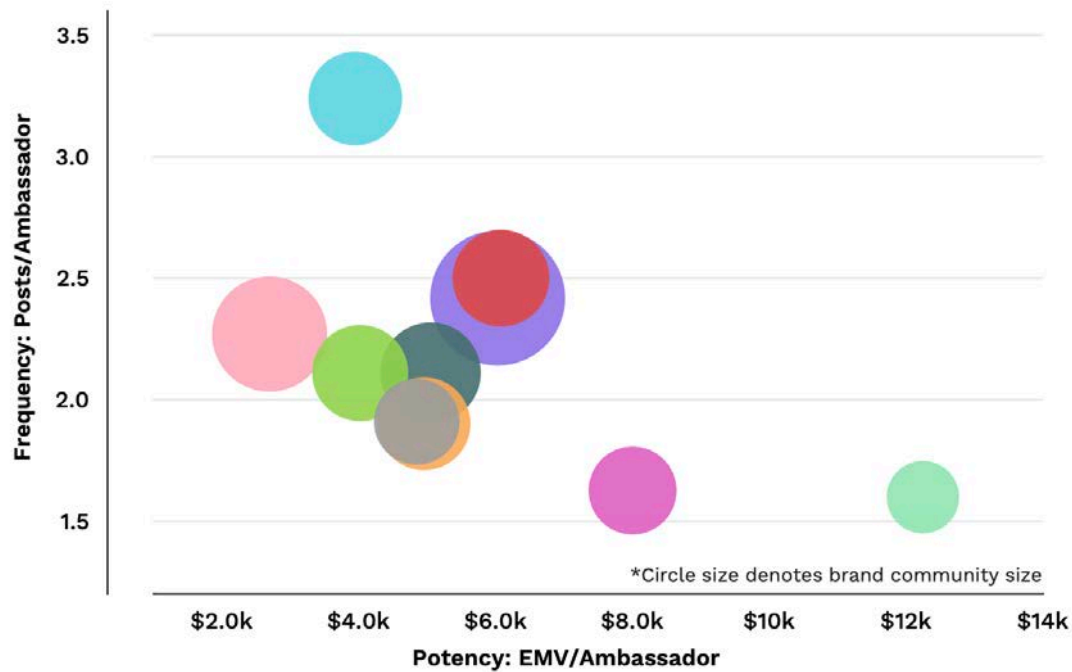
Top 10 Skincare Brands in the UK

Rank	Brand	March 2023 EMV	MoM	YoY
1st → 0	Elemis	\$4,130,322	↗ 15%	↗ 155%
2nd ●	L'Oréal Paris (Skincare)	\$2,426,240	↗ 117%	↗ 290%
3rd ↗ 2	CeraVe	\$2,338,991	↗ 37%	↗ 180%
4th ↘ 2	Drunk Elephant	\$2,142,849	↘ -32%	↗ 448%
5th ↗ 2	Tatcha	\$1,917,684	↗ 21%	↗ 321%
6th → 0	La Roche-Posay	\$1,607,928	↘ -4%	↗ 76%
7th ↘ 3	The Inkey List	\$1,398,739	↘ -24%	↘ -29%
8th ●	REN Skincare	\$1,347,799	↗ 17%	↘ -9%
9th ●	Sol De Janeiro	\$1,345,472	↗ 168%	↗ 319%
10th ↘ 2	L'Occitane en Provence	\$1,306,386	↘ -2%	↗ 54%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for UK Skincare Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Elemis	684	2.4	\$6,038
L'Oréal Paris (Skincare)	198	1.6	\$12,254
CeraVe	292	1.6	\$8,010
Drunk Elephant	352	2.5	\$6,088
Tatcha	379	2.1	\$5,060
La Roche-Posay	324	1.9	\$4,963
The Inkey List	347	2.1	\$4,031
REN Skincare	498	2.3	\$2,706
Sol De Janeiro	277	1.9	\$4,857
L'Occitane en Provence	330	3.2	\$3,959

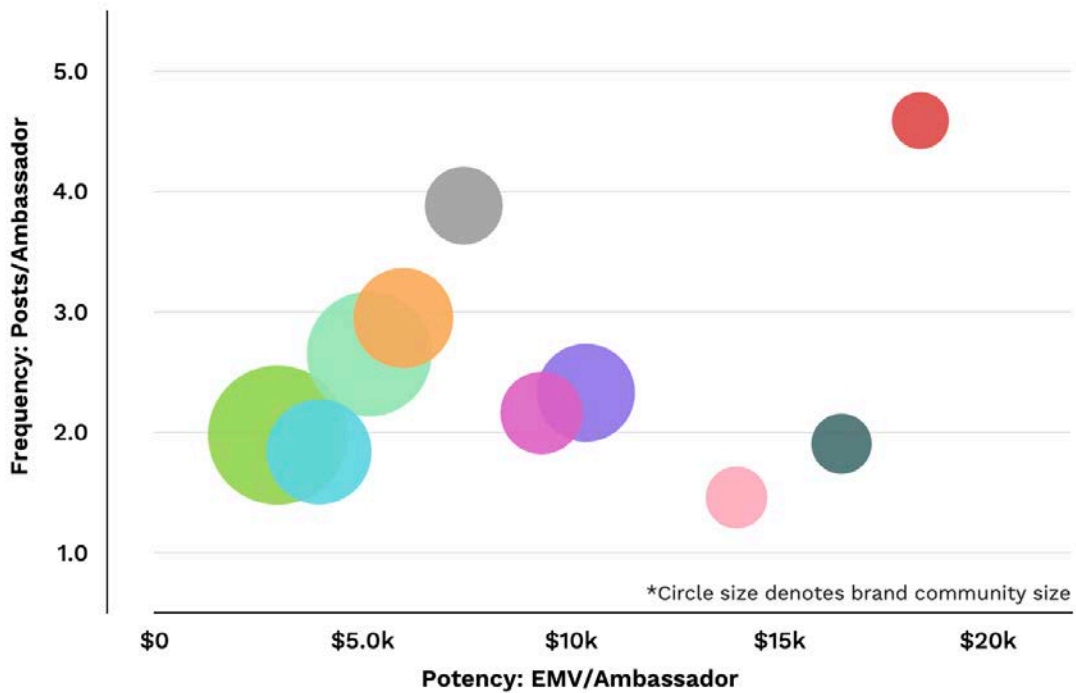
Top 10 Skincare Brands in France

Rank	Brand	March 2023 EMV	MoM	YoY
1st ↗ 8	La Roche-Posay	\$1,605,676	↗ 122%	↗ 267%
2nd → 0	Typology	\$1,295,857	↘ -11%	↗ 60%
3rd → 0	CeraVe	\$1,022,708	↘ -11%	↗ 98%
4th ●	Ole Henriksen	\$974,315	↗ 285%	↗ 481%
5th ●	Nivea	\$973,091	↗ 357%	↗ 281%
6th → 0	L'Occitane en Provence	\$962,997	↘ -3%	↗ 64%
7th ↘ 3	Caudalie	\$925,229	↘ -17%	↘ -11%
8th ●	L'Oréal Paris (Skincare)	\$866,289	↗ 794%	↗ 76%
9th ●	Kiehl's	\$728,117	↗ 83%	↗ 59%
10th ↘ 9	Erborian	\$705,105	↘ -56%	↘ -48%

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

Top 10: Community Metrics

Community Size, Frequency, and Potency for France Skincare Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
La Roche-Posay	155	2.3	\$10,359
Typology	251	2.6	\$5,163
CeraVe	110	2.2	\$9,297
Ole Henriksen	53	4.6	\$18,383
Nivea	59	1.9	\$16,493
L'Occitane en Provence	161	2.9	\$5,981
Caudalie	312	2.0	\$2,965
L'Oréal Paris (Skincare)	62	1.5	\$13,972
Kiehl's	98	3.9	\$7,430
Erborian	178	1.8	\$3,961

Brand Highlights

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

Europe

Brand:

Yepoda

yepoda
예쁘다

Highlight:

Campaign

Korean Skincare Yepoda snagged the No. 1 spot this month in Europe thanks to an impressive \$6.0M EMV and an astronomical 192% MoM surge. Yepoda generated online buzz when it hosted a slew of European creators, including Aida Martorell (@aidamartorell), Adriana Spink (@adrianaspink), and Raquel Reitx (@raquelreitx), for a getaway in Seoul, South Korea. This group authored content documenting their daily adventures—featuring traditional Korean spa treatments and cooking classes—as well as personalized codes for a 40% discount on Yepoda offerings. This campaign ultimately contributed to the brand's 1.3k mentions, as well as its considerable \$26.2k EMV per creator average in March.

UK

Brand:

Sol De Janeiro

SOL DE JANEIRO

Highlight:

Community

Viral skincare brand Sol De Janeiro experienced significant growth in March, collecting \$1.3M EMV—a noteworthy 167% MoM gain. The brand welcomed more than 200 new fans in the U.K., such as Olivia Kirkby (@olivia_kirkby on TikTok), Bel Priestley (@belpriestley), and Cinzia Bay Lizzullo (@cinziayullo), who collectively fueled a considerable \$1.0M EMV for Sol De Janeiro. This group's content primarily featured product reviews about the brand's wildly popular Bum Bum Body Cream, a #SkinTok staple that has amassed 199M views to-date via the hashtag #BumBumCream. In all, this activity boosted Sol De Janeiro's online mentions by 114% MoM, while the brand's average creator potency surged by 61% MoM.

France

Brand:

La Roche-Posay

LA ROCHE-POSAY

Highlight:

Community

La Roche-Posay climbed the Top 10 this month, securing the No. 1 spot with a notable \$1.6M EMV and an outstanding 123% month-over-month gain. The derm-favorite brand continued to expand its community of French #SkinTok creators, welcoming more than 100 new ambassadors, including Marie Cid (@maybeshanaa), Laura Guillon (@lauraguillon), and Charlotte Vidal (@harlotte.vidl). This incoming cohort authored content ranging from educational product overviews to personal reviews, and collectively powered \$678.0k EMV for La Roche-Posay—a noteworthy 42% of its March total. In all, the brand experienced an impressive 78% MoM increase in average potency, which reached a whopping \$10.4k EMV per creator.

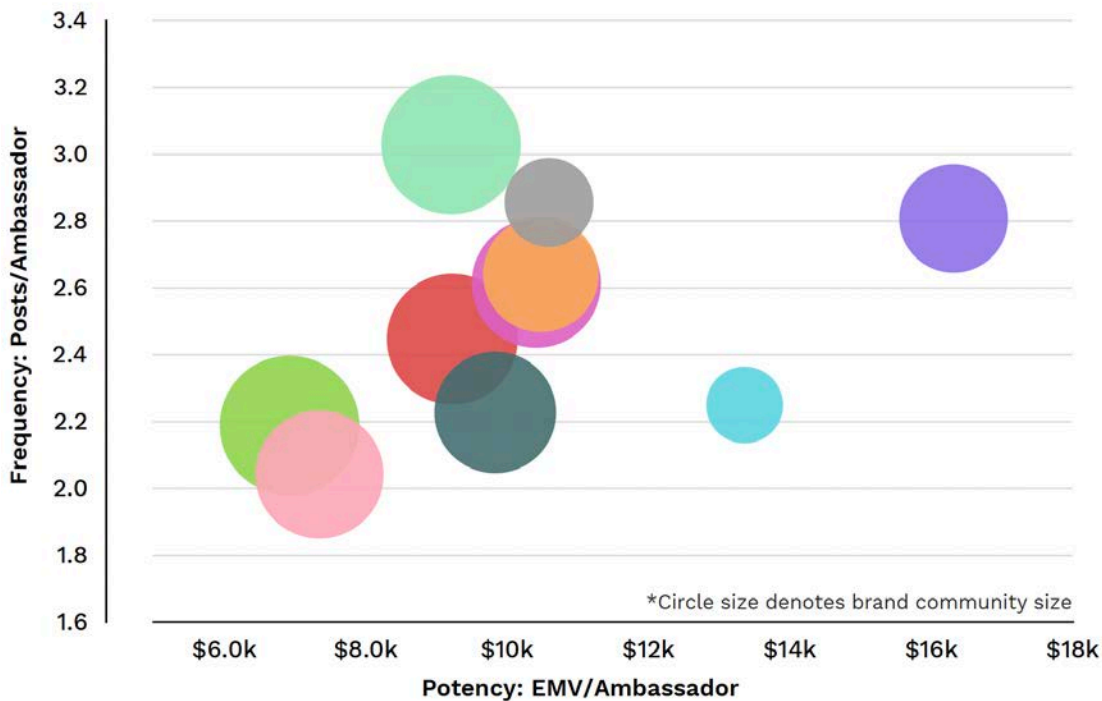
Top 10 Luxury Fashion Brands in the US

Rank	Brand	March 2023 EMV	MoM	YoY
1st ↗ 9	Versace	\$37,282,310	↗ 132%	↗ 46%
2nd ↗ 3	Chanel (Fashion)	\$34,751,909	↗ 44%	↘ -6%
3rd → 0	Louis Vuitton	\$33,647,277	↗ 18%	↘ -12%
4th → 0	Dior (Fashion)	\$30,604,120	↗ 12%	↘ -25%
5th ↗ 1	Saint Laurent (YSL) (Fashion)	\$28,201,940	↗ 17%	↘ -7%
6th ↗ 1	Valentino	\$27,094,023	↗ 37%	↘ -22%
7th ↘ 5	Gucci (Fashion)	\$26,148,342	↘ -17%	↘ -35%
8th ↘ 7	Prada	\$23,414,754	↘ -28%	↘ -29%
9th ●	Loewe	\$16,239,976	↗ 34%	↗ 94%
10th ↘ 2	Dolce & Gabbana (Fashion)	\$15,226,023	↘ -14%	↘ -6%

● 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



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Versace	2,284	2.8	\$16,323
Chanel (Fashion)	3,771	3.0	\$9,216
Louis Vuitton	3,229	2.6	\$10,420
Dior (Fashion)	3,315	2.4	\$9,232
Saint Laurent (YSL) (Fashion)	2,866	2.2	\$9,840
Valentino	2,584	2.6	\$10,485
Gucci (Fashion)	3,773	2.2	\$6,930
Prada	3,184	2.0	\$7,354
Loewe	1,532	2.9	\$10,601
Dolce & Gabbana (Fashion)	1,139	2.2	\$13,368

Brand Highlights

A Closer Look at US Luxury Fashion

Brand:

Versace



Highlight:

Event

In a reshuffling of brands within the U.S. luxury fashion Top 10, Versace ranked at No. 1, garnering \$37.3M EMV, a notable 132% month-over-month increase. Key to the brand's success was its strong presence at the 95th Academy Awards in Los Angeles. Versace clothed numerous high-profile celebrities, but it was Lady Gaga (@ladygaga on Instagram) who stole the spotlight with a stunning evening gown from the brand's Fall-Winter 2023 collection. Fans raved about the superstar's chic look, with #LadyGaga ranking as the brand's fifth-most impactful hashtag, generating \$892.0k EMV via 109 mentions.

Brand:

Balmain



Highlight:

Activation

Another luxury fashion brand to benefit from impactful celebrity partnerships, Balmain thrived in March, growing by an impressive 187% MoM to collect \$12.2M EMV. This momentum was sparked thanks to a collaboration with pop icon Beyoncé (@beyonce on Instagram). In late March, Balmain announced a surprise couture collection inspired by the singer's album 'Renaissance,' featuring dramatic pieces, like hammered metal breastplates, 3D-printed bustiers, and fireworks made from feathers. As a result, #Beyonce and #Beyoncé garnered a collective \$919.6k EMV from 83 creators buzzing about the collection.

Brand:

Off-White




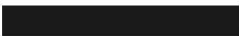































Highlight:

Event

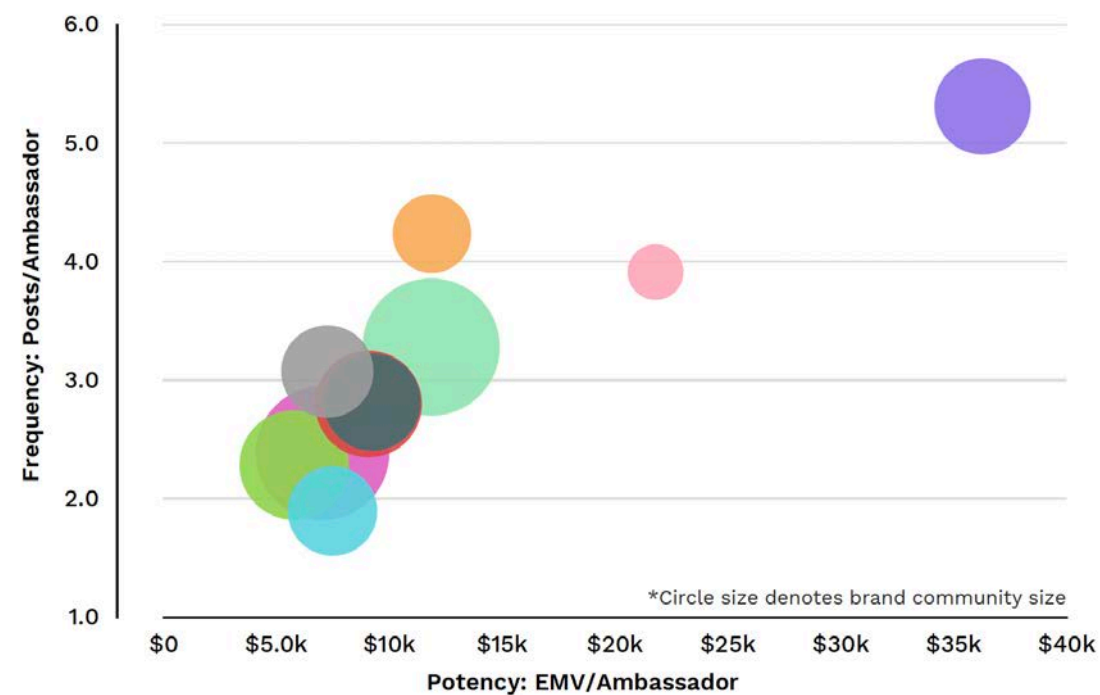
Off-White made a splash at Paris Fashion Week 2023, with its lunar-inspired collection drawing praise from the fashion community. #PFW and #ParisFashionWeek ranked among the brand's top three hashtags, collectively contributing an impressive \$1.7M EMV via 215 mentions. Starring in Off-White's runway lineup was model Naomi Campbell (@naomicampbell on Instagram), who wore a jaw-dropping black dress to emphatic applause from an excited crowd. Campbell's own promotion of the event via three posts helped Off-White to \$212.2k EMV. In all, Off-White closed the month with \$12.2M, a 122% MoM jump.

Top 10 Apparel Brands in the US

Rank	Brand	March 2023 EMV	MoM	YoY
1st → 0	Fashion Nova	\$124,190,728 	 3%	 -6%
2nd → 0	Nike	\$82,555,395 	 21%	 13%
3rd → 0	Zara	\$46,468,410 	 9%	 -19%
4th → 0	SHEIN	\$38,239,913 	 5%	 -27%
5th → 0	Adidas	\$32,126,591 	 -12%	 16%
6th → 0	Alo Yoga	\$27,111,830 	 0%	 13%
7th  2	H&M	\$25,623,839 	 11%	 -6%
8th → 0	Gymshark	\$24,953,477 	 -2%	 -28%
9th  1	Abercrombie & Fitch	\$22,833,569 	 16%	 5%
10th  3	Skims	\$22,205,820 	 -15%	 -2%

Top 10: Community Metrics

Community Size, Frequency, and Potency for US Apparel Brands



Brands	No. of Ambassadors	Posts per Ambassador	EMV per Ambassador
Fashion Nova	3,422	5.3	\$36,292
Nike	6,954	3.3	\$11,872
Zara	6,577	2.4	\$7,065
SHEIN	4,201	2.8	\$9,103
Adidas	3,468	2.8	\$9,264
Alo Yoga	2,277	4.2	\$11,907
H&M	4,413	2.3	\$5,806
Gymshark	1,144	3.9	\$21,812
Abercrombie & Fitch	3,138	3.1	\$7,276
Skims	2,958	1.9	\$7,507

Brand Highlights

A Closer Look at US Apparel

Brand:

Acne Studios

Acne Studios

Highlight:

Event

Swedish fashion brand Acne Studios enjoyed a successful March, growing by 110% month-over-month to capture \$10.3M EMV, despite not ranking in the Top 10. The brand's presence at Paris Fashion Week 2023 was key to its success. Acne Studios presented its "futuristic mysticism"-influenced collection, sparking conversation online and helping #PFW, #AcneStudiosFW23, and #ParisFashionWeek rank among the brand's top hashtags. Collectively, these hashtags contributed \$798.3k EMV via 59 mentions. Additionally, the brand benefited from an impactful new partnership with lifestyle influencer Mia Khalifa (@miakhalifa on Instagram), who chronicled her experience at the event, helping Acne Studios achieve a notable \$2.1M EMV.

Brand:

Reebok



Highlight:

Event

Reebok cemented a successful March thanks to its strong partnership with retired basketball superstar Shaquille O'Neal (@shaq on Instagram). Reebok sponsored Shaq's 51st birthday celebration, called the Sneaker Ball, which brought together top politicians, athletes, and entertainers to honor the NBA Hall of Famer. Shaq's two brand mentions of Reebok at the event were highly successful, generating \$227.0k EMV and making him one of Reebok's most impactful creators. Additionally, Reebok benefited from an expanded relationship with popular Puerto Rican rapper Anuel AA (@anuel), whose 24 mentions helped the sports apparel brand collect \$1.7M EMV. Reebok closed the month with \$6.5M EMV, a 38% MoM increase.

Brand:

Reformation

Reformation

Highlight:





Community

Reformation grew by 48% MoM, collecting \$4.8M EMV thanks in part to a focus on community growth and expanding upon its existing partnerships. In March, Reformation's community increased by 16% MoM, swelling to 912 creators. Among its incoming cohort were powerhouse influencers like lifestyle creator Kennedy Eurich (@keneurich on Instagram) and actress Brie Larson (@brielarson), who collectively powered a notable \$189.9k EMV and ranked among Reformation's 10 most impactful creators. However, retained creators also shined for the apparel brand: Reformation's No. 1 EMV-driver, fashionista Samantha Guerrero (@samanthaguerrero_), upped her potency by an impressive 288% MoM, delivering \$139.2k via 15 brand mentions.







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."