



Influence marketing at the heart of accessory and fashion brands' performance.

KEY FIGURES, TOP BRANDS BY INDUSTRY, SHARE OF VOICE, AND 2021 TRENDS.



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Founder & CEO - Kolsquare



The fashion industry and the influencer marketing industry have one thing in common – rising global value. The fashion industry is worth nearly **\$3 trillion**, and e-commerce in the industry is expected to reach **\$668 billion** this year.

Meanwhile, the Influencer Marketing industry has grown from **\$1.7 billion** in 2016 to an estimated **\$14 billion** by 2021. With the explosion of social commerce and the use of social networks, the choice of Influence becomes increasingly relevant in the fashion world.

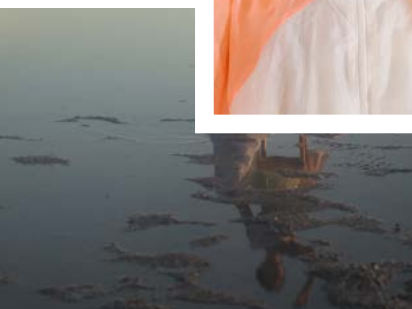
All networks are now developing new tools to enable brands to sell better and Influencer partnerships to be more transparent. The Customer Data Platform allows for better targeting and measurement of the impact of campaigns. The conditions for influencer marketing are improving day by day.

Influence is a strategy that can have different objectives for fashion brands – improving their branding, working on their image, finding new prospects or increasing their sales. It is a strategy that has been adopted by both luxury and independent brands. No doubt because of what it brings – a new proximity with consumers, authenticity, creativity, commitment.

For example, luxury brands **Joop!** chose to partner with KOL and artist **Toni Mahfud** to create its Instagram ads, who has become a true brand ambassador. The result: a 27% decrease in cost per person reached and a 60% increase in ad recall according to the latest **Instagram figures**. Fashion brands are even creating capsules with KOLs who sometimes become brand creators themselves. Communities on TikTok make and break trends. In short, influencers and Influencer marketing in general have a place in fashion today more than ever.



This is the reason behind this study, which analyses the links between the fashion industry and influencer marketing, and the performance of the various sectors on the networks: fashion trends on Instagram and TikTok, brand performance, live shopping, social commerce, data... An overview of practices, consumption habits and the latest trends.



About



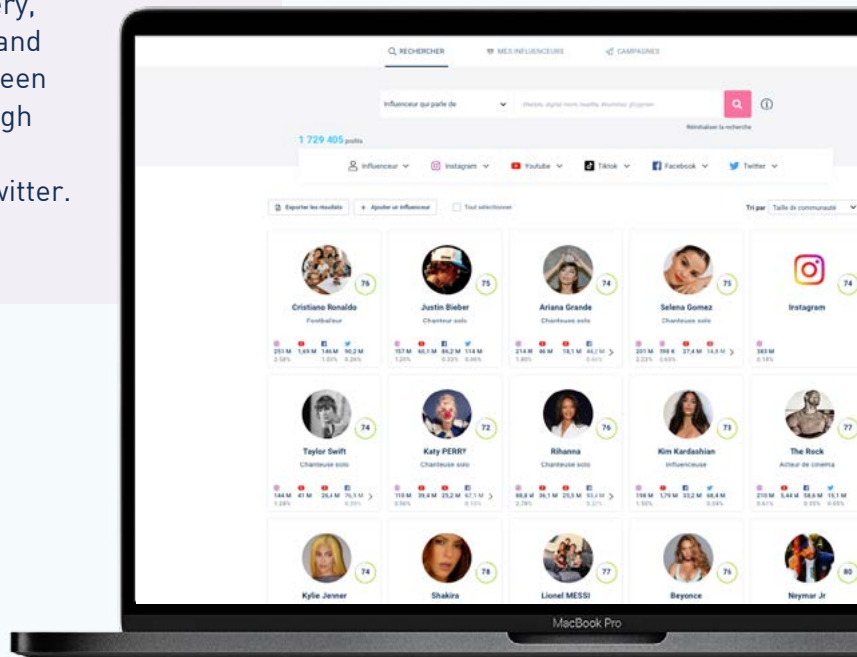
Kolsquare, is a data-driven Influence Marketing platform that helps brands optimise each stage of their Influence Marketing campaign using data analysis and machine learning. This solution not only identifies the most appropriate profiles for a campaign from a catalogue of over 1.7 million KOL (Key Opinion Leaders), but also measures and analyses the performance of each campaign.

Kolsquare is composed of a team of 40 experts who help you implement your Influence Marketing strategies so that you can build effective campaigns and sector knowledge using case studies, barometers and relevant insights.



METHOD

The study of fashion industry trends and Influencers is based on the analysis of 1.7 million Kolsquare influencers, including 207,019 profiles from different fashion sectors: accessories, jewellery, lingerie, shoes, children, luxury, sportswear, and independent brands. The posts analysed between June 2020 and May 2021 were identified through fashion-related hashtags and brand tags on Instagram, YouTube, TikTok, Facebook and Twitter.



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FASHION INFLUENCE IN 2021

01



Focus Data Kolsquare

The data presented in the following section covers both the fashion industry as a whole and all social media: engagement, posts, EMV

The Share of Voice and Earned Media Value (EMV) have been defined by country for each brand and sector on Instagram. EMV is calculated by comparing **the overall engagement of a brand** (i.e., likes, comments, views, shares) and the cost of each type of engagement. It allows a brand to define the ROI of its Influence Marketing as well as identify the brand's performance on all social media platforms and the fashion industry in general.

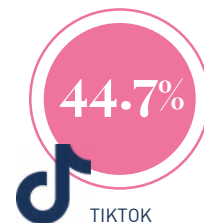
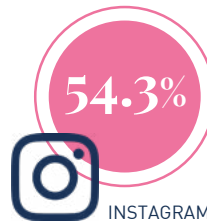
Influence Fashion figures



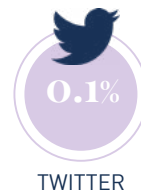
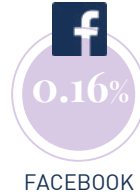
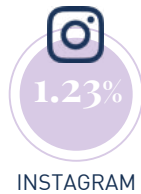
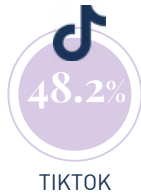
6,863,491

Fashion posts between June 2020 and May 2021

Over **26 billion** engagements

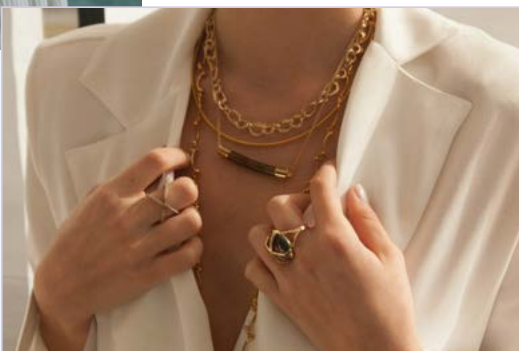
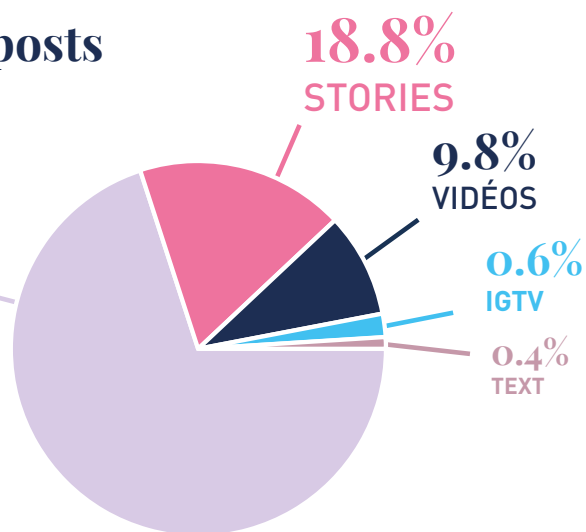


Engagement rate



On all fashion posts

70.3%
OF PICTURES

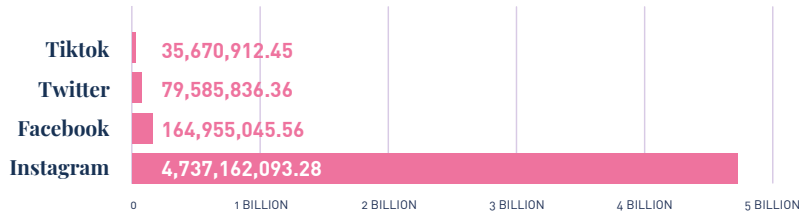


The total fashion/influence **EMV** is generally:

5,017,373,887.6

EMV is calculated by comparing the overall engagement of a brand (i.e., likes, comments, views, shares) and the cost of each type of engagement. It allows a brand to define the ROI of its Influence Marketing as well as identify the brand's performance on all social media platforms and the fashion industry in general.

EMV PER SOCIAL MEDIA



HASHTAGS OVER 500K

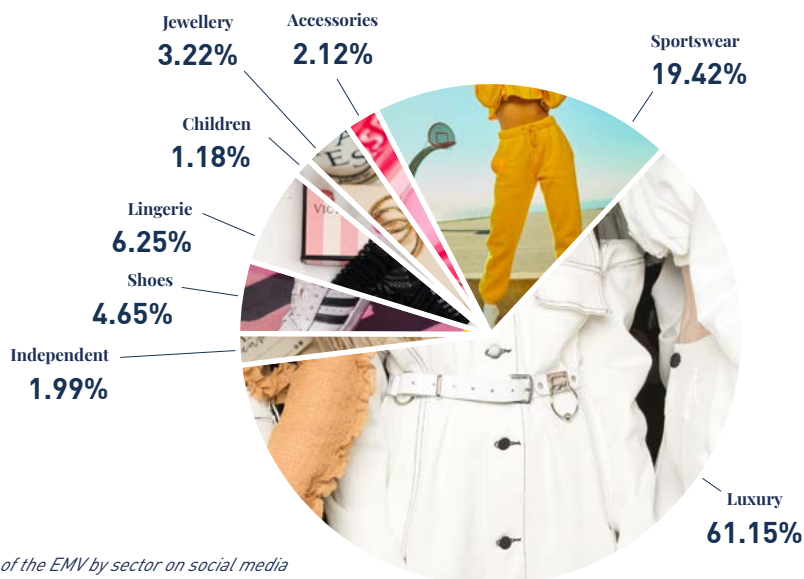
- #fashion
- #ootd
- #look
- #outfit
- #fashionista
- #mode

OVER 250K HITS

- #fashionblogger #outfitoftheday
- #outfitinspiration #instafashion

OVER 100K HITS

- #dress #ootdfashion #zara
- #adidas #nike #menstyle
- #mensfashion #lookdujour
- #fashionblog #syleoftheday

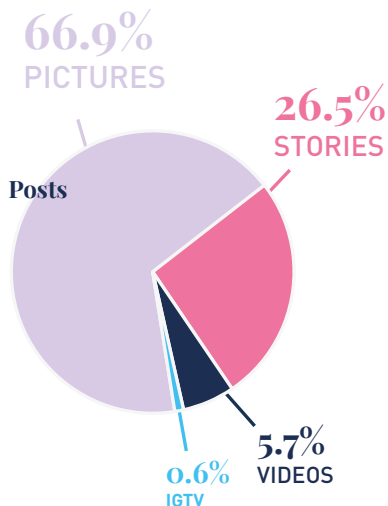
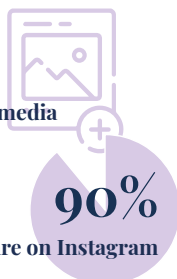


The distribution of the EMV by sector on social media (Instagram, TikTok, Twitter, Facebook and YouTube)

Instagram Global Insights

6,863,491

posts related to fashion on social media
between June 2020 and May 2021



Engagement rate



EMV : **147,915,420**

Most mentioned brands on Instagram:

MORE THAN 20K MENTIONS

#Zara #Hm
#ASOS

MORE THAN 10K MENTIONS

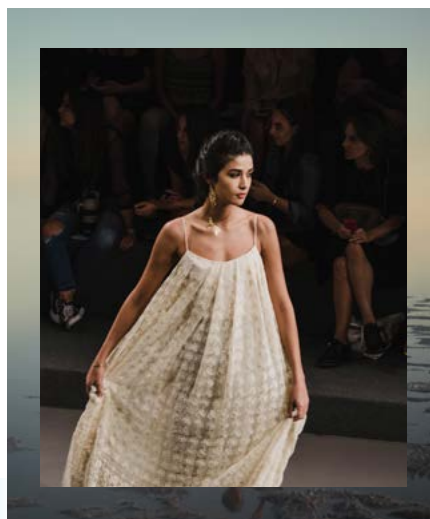
#Sézane #Kiabi #Shein
#Mango #About You

MORE THAN 5K MENTIONS

#Topshop #Pimkie #Chanel
#Primark #Stradivarius #Dior
#Newlook #Nike #Converse
#Nasty Gal #Purelei #Promod
#Prettylittlething #Bershka #Primark
#Asos #Verbaudet

PLUS DE 25K MENTIONS

#love #lookoftheday #ootd
#outfitinspiration #picoftheday
#fashion #picoftheday
#outfitoftheday #style #look
#lifestyle #outfit #mode #look
#fashionblogger #outfitinspiration
#lifestyle #style #instagood





What tools can fashion brands use on Instagram?

When it comes to aesthetics, Instagram is the first choice for fashion brands because it is visually oriented and offers an ever increasing audience.

Instagram's strength is its ability to spark new trends and become a real showcase for advertisers. We still love fashion shows and magazines, but **consumers now want to connect with brands in a different way**. Social media offers this new approach. This is as true for luxury brands as it is for independent and digital native brands.

Thanks to social media, fashion has all the tools available to be more authentic and more accessible. In 2020, **the shows of most great designers are broadcast live**. A good example is **Jacquemus' «L'Amour»**, broadcasted last July on Instagram, or those of **Balmain**. **Hermès** was one of the first brands to launch this concept by also showing what goes on backstage.

New generations also tend to distrust traditional marketing and **prefer to follow the advice of their favourite content creator, as they would that of their friends** on Instagram. In 2020, out of 80,000 people surveyed, 47% of 18-34 year-olds preferred to turn to content shared on social media for information, compared to 24% who relied on TV channels like television¹. With Influence Marketing, brands are able to convey a message to an engaged community that follows a KOL instead of being forced to start from scratch.

Jacquemus, "L'Amour"



¹ - Reuters Digital News Report 2020

Instagram's new tools to integrate into an Influence Marketing campaign

Thanks to the shopping tab, Instagram now offers a personalised shopping feed to its users, who are able to buy the products they see in a more direct way. This is a great plus for brands and a strategy that fits perfectly with Influence Marketing.

All of these new options also enable affiliate marketing strategies and give useful insights to sales data generated by a campaign. These help both influencers and brands alike.

Brands can now integrate links to their products in all Instagram formats thanks to different tools:

✓ Online Shop

A brand can open its online shop and then allow a KOL to sell their products on their own account. This streamlines the buying process.

✓ Product Tags

Products can be directly identified in sponsored publications.

✓ Shopping Tab

It appears directly on the home page. This option is already available for brands like [@elisechalmin](#) or [@heimstone](#).

✓ Shopping Reel

An icon allows you to find the products presented in a Reel in one click. This feature is already used by brands such as [@thesocialitefamily](#), [@jonak](#) or [@makemylemonade](#)

✓ Classic Options

These include a link in the bio, an affiliate link, a promotional code and the swipe-up option in a story that allows the user to go directly to the brand's website

Guides are a new type of content that has emerged on Instagram. Using this format, influencers, users and brands can showcase places, products and posts. Each post and video contains useful tips and one-click links to each post. A good example is the [«Gucci Love, Love & Love»](#) Guide that introduces the brand's collection, in addition to its collaboration with **The North Face**, or **Dolce & Gabbana's** [«#DGDigitalShow»](#) which opens the fashion show.

In order to bring more transparency to partnerships, Instagram has also introduced tags that identify branded content for each format.



How to use TikTok for Influence Marketing

Partnerships between influencers and fashion brands are quickly multiplying on TikTok. But beware of missteps: the social media platform has its own particularities, and it is important to take them into account. Here are three golden rules to get started:



Respect the platform's codes: storytelling and "keep it simple"

This is certainly the most important point for any brand launching a campaign on TikTok. Although the platform's codes are constantly changing, the content has a lot in common: it is **straightforward, entertaining, limited on production or editing and not too serious**. The content is in fact **more authentic** than that found on Instagram and is intended to **be inclusive**.

Fashion is for everyone on TikTok. The culture itself is important, as is **the storytelling aspect**. In addition to the usual challenges and lip sync, there is ample storytelling and sharing of personal experiences.

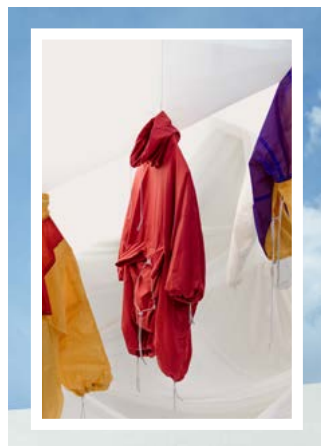
The brands that operate on TikTok have understood **these codes and generate less flat and controlled content**. **Louis Vuitton** did not hesitate to show the backstage of the brand in an authentic way that generated more than 4 million likes. In fact, the brand has not stopped to show his backstage since.

Let content creators take control

The content creators on TikTok **understand the codes of the platform – they are, after all, their own**. Perhaps one of the best examples of its effectiveness is Gucci. The brand initially launched several marketing campaigns on the platform without much success. However, it made news last year thanks to **the challenge** initiated by the influencer **Morgan Presley imitating a Gucci model**. The hashtag **#guccimodelchallenge** gained momentum. The brand then started a collaboration with the influencer and **other content creators who took up the challenge**. It was a great success, **showing that giving control and creative freedom to KOL is a winning strategy**. They know their audience better than anyone.

Do cross-platform campaigns

TikTok is a success, but brands are well advised to collaborate **with KOL on multiple platforms**. While the competition between Instagram and TikTok has been evident since the inception of Reels, it is not as obvious when it comes to an influencer campaign. **Many KOL are registered on both platforms. Reels have taken over the codes of TikTok**, so there is in fact a great deal of content of this type on the platform. While **TikTok offers greater virality, Instagram provides a larger audience, making it apparent that the codes on these platforms are not identical**. The same happens on Pinterest or Facebook. Brands can therefore make the most of each platform depending on their objectives.





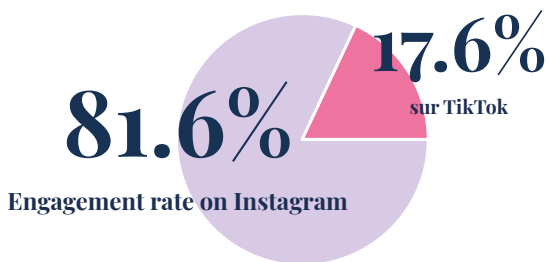
01

Brand performance on social media by sector:

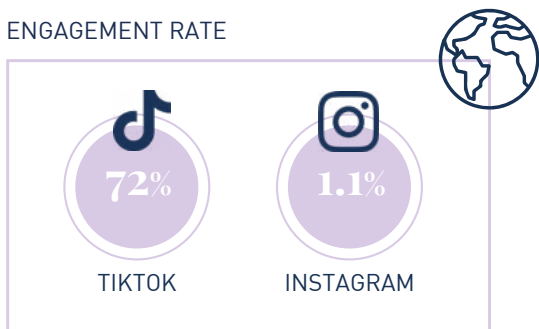
Luxury

Overall :

913,598 posts



ENGAGEMENT RATE



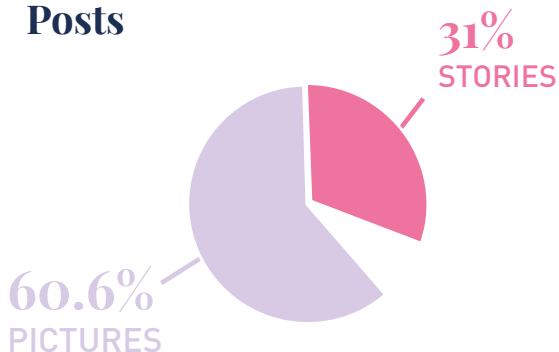
WITH MORE THAN 20K HITS

#fashion #dior #gucci #prada #beauty #hermes #chanel #love #outfit #style #ootd #fashionblogger #outfitoftheday #makeup #instagood #louisvuitton



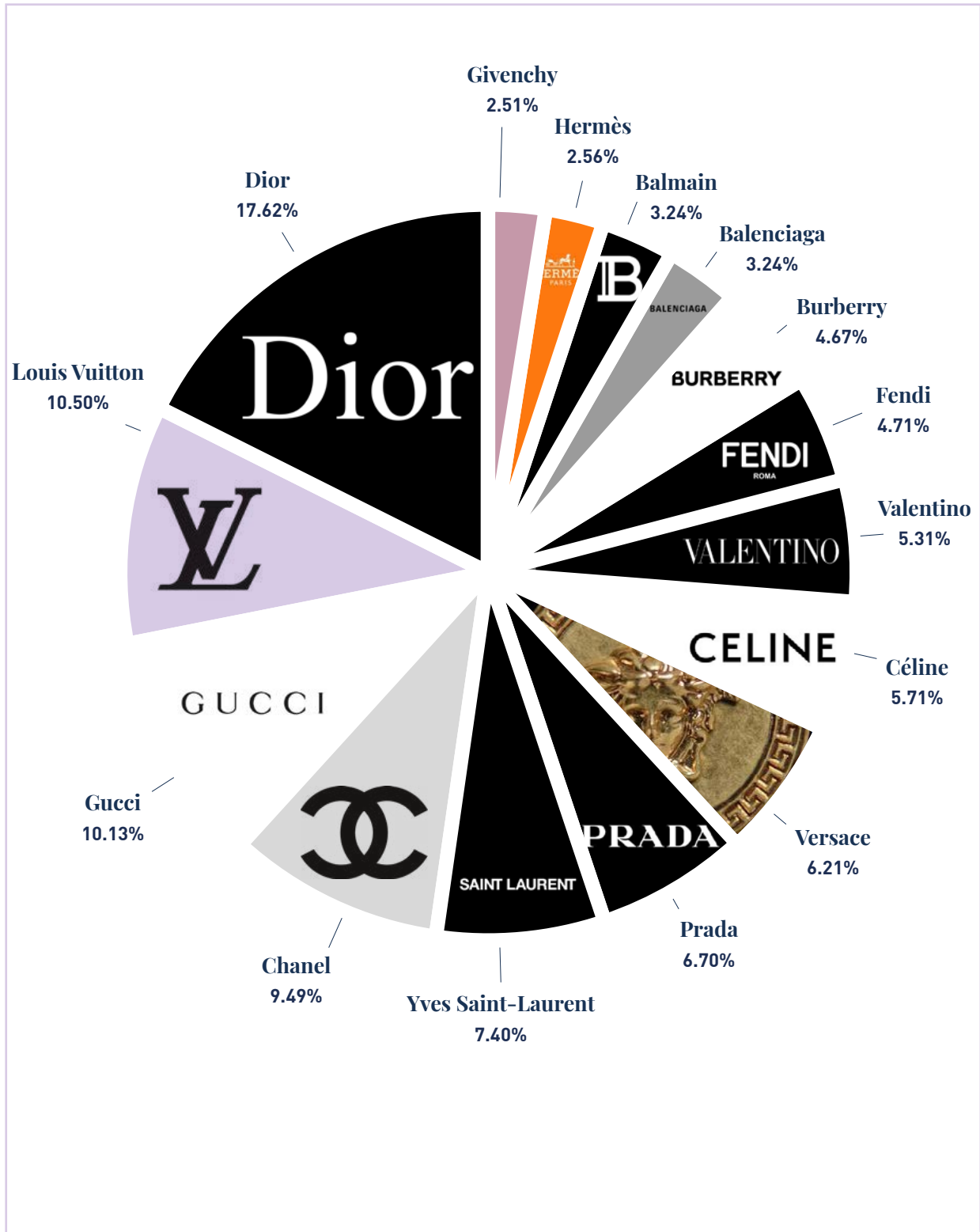
65,660 influencers

Posts



Luxury

Share of voice of brands in terms of EMV (globally)
(top 15 EMV)

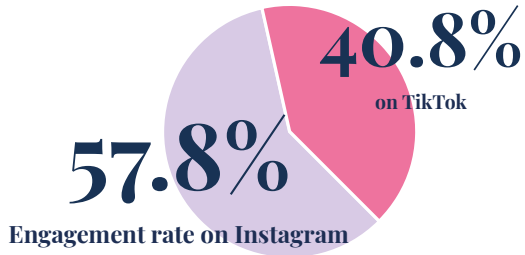




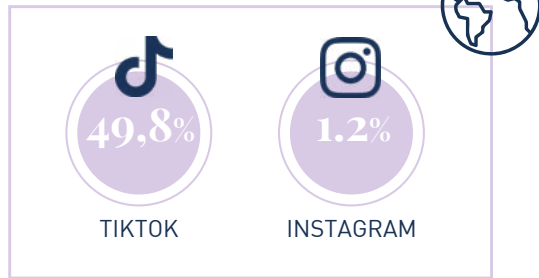
Sportswear

Overall :

533,901 posts



ENGAGEMENT RATE



WITH MORE THAN 15K HIT

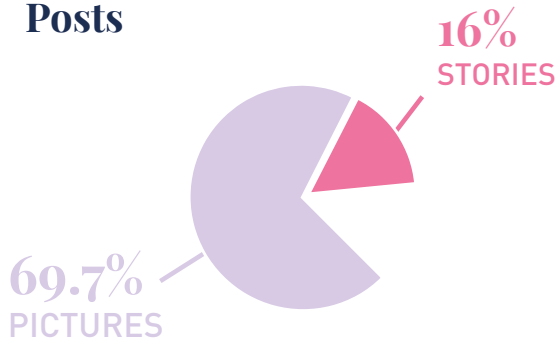
#nike #adidas #champion
 #sneakers #fashion #fitness
 #puma #running #training
 #sneakerhead #photooftheday #love
 #instagood #motivation #style
 #photography #ootd #sport



64,597
influencers

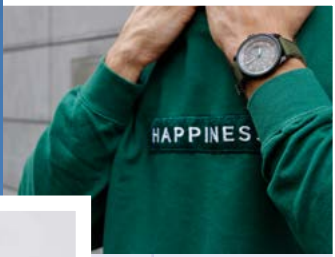
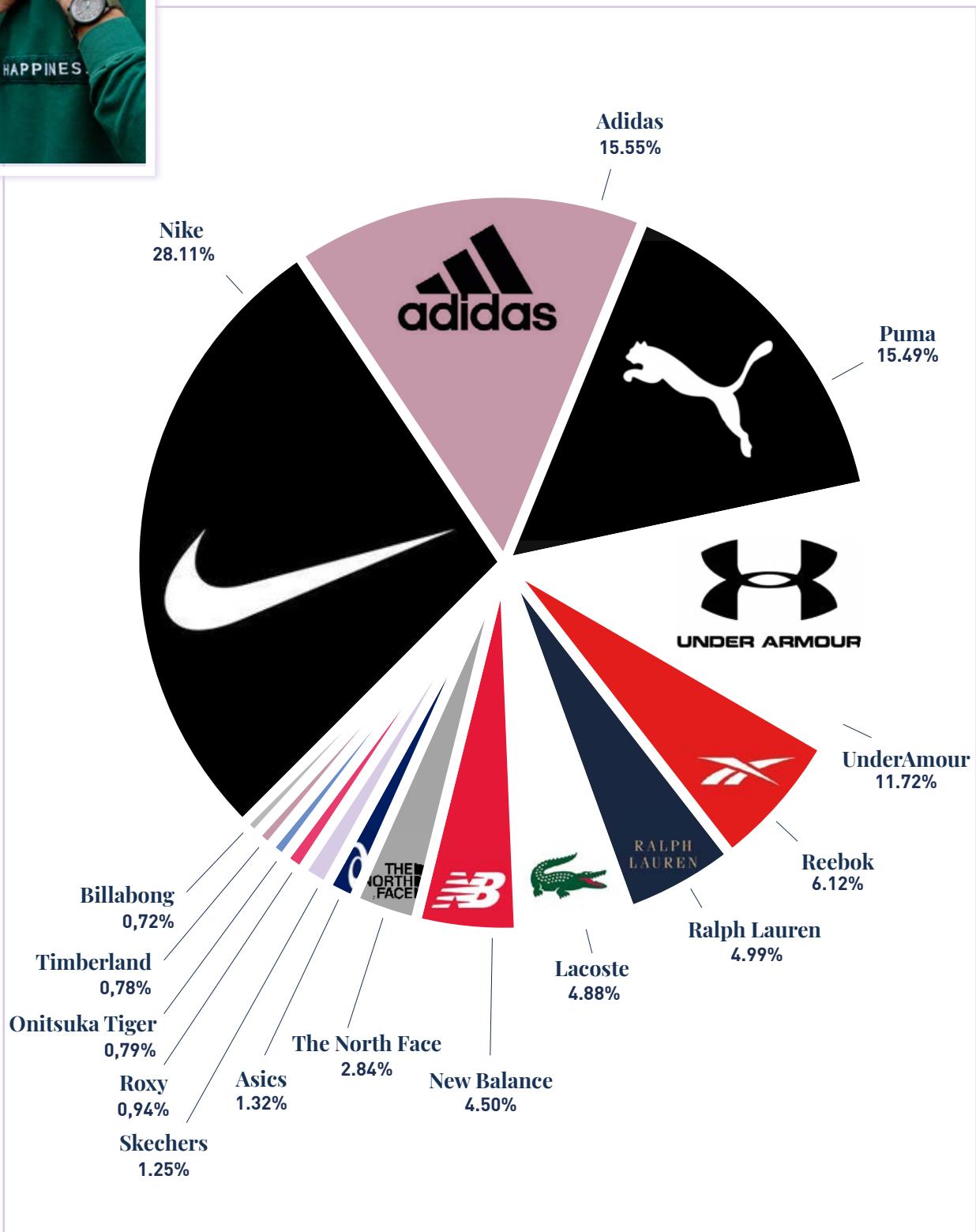


Posts



Sportswear

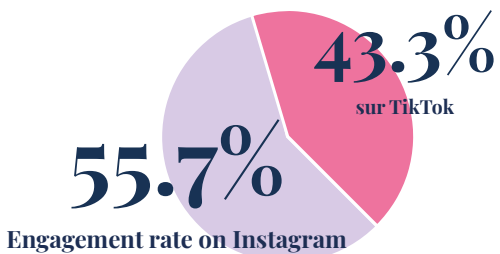
Share of voice of brands in terms of EMV (globally)
(top 15 EMV)



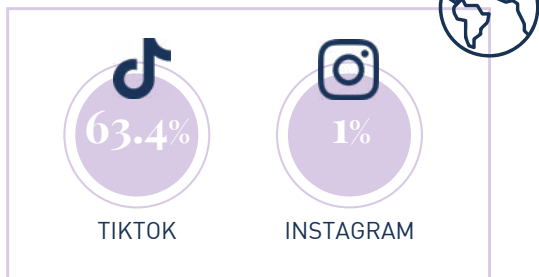
Shoes

Overall :

154,259 posts



ENGAGEMENT RATE



WITH MORE THAN 5K HIT

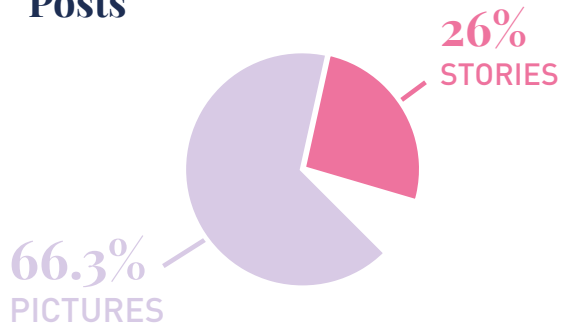
#outfitoftheday #outfitinspiration
 #style #look #converse #vans #ootd
 #fashion #outfit #camper
 #vanlife #fashionblogger
 #lookdujour #lookoftheday #love



25,790 influencers

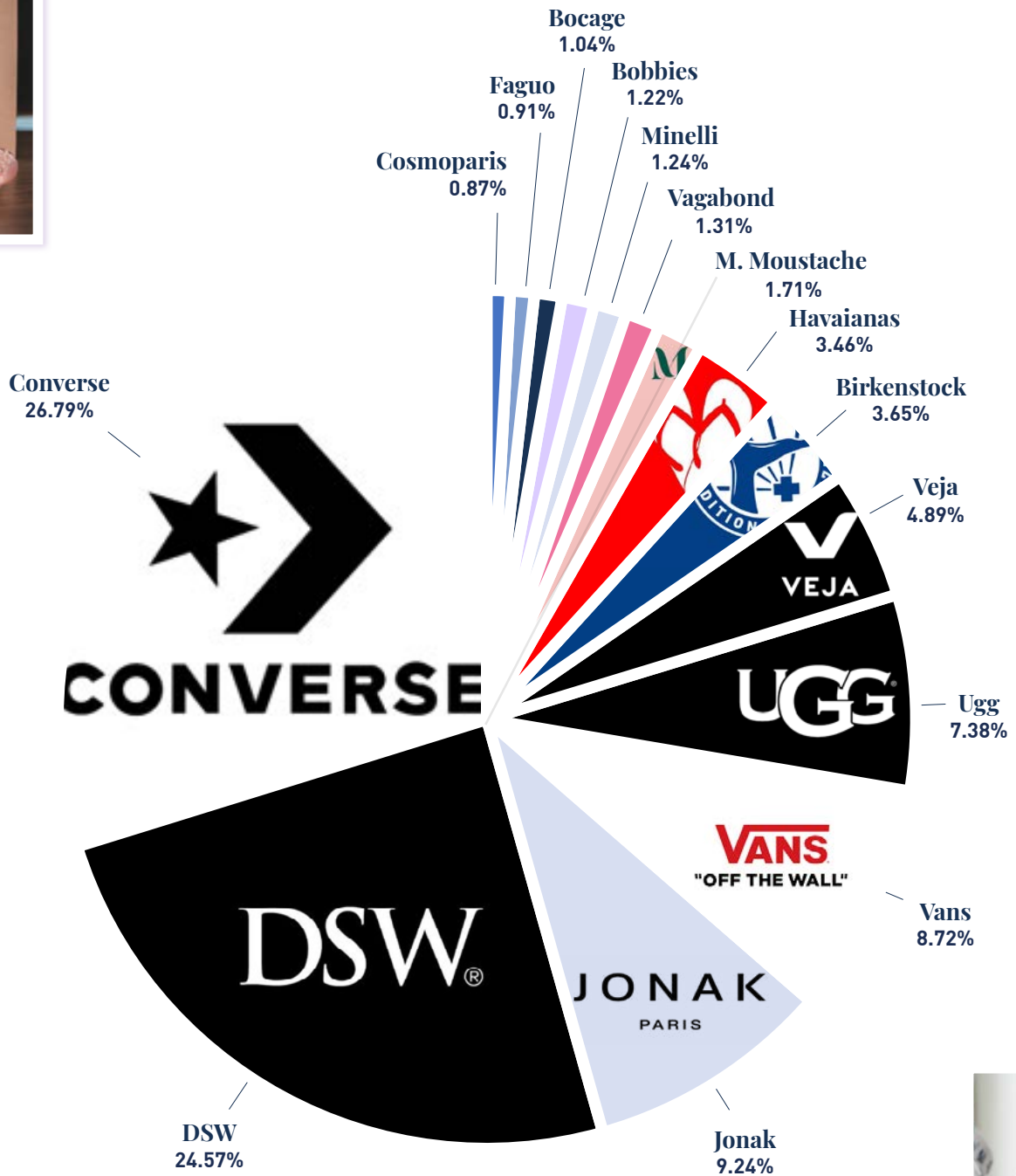


Posts



Shoes

Share of voice of brands in terms of EMV (globally)
(top 15 EMV)





Lingerie

Overall :

128,431 posts

89.2%

Engagement rate on Instagram

96.4%

On Instagram



2.12%

On Facebook



0.9%

On Twitter

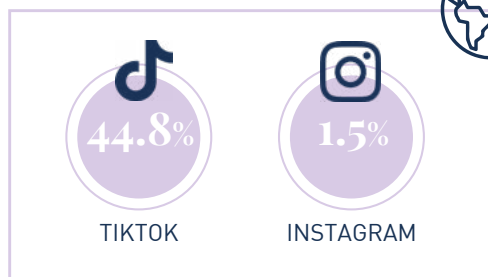


0.5%

On TikTok



ENGAGEMENT RATE



WITH MORE THAN 4K HITS

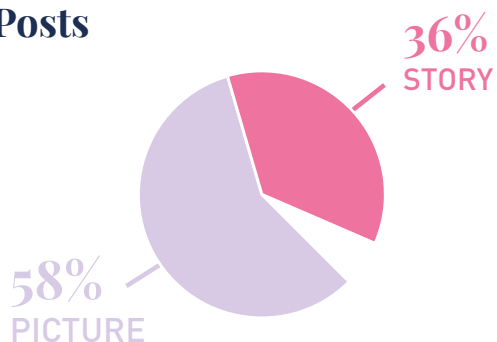


24,889
influencers



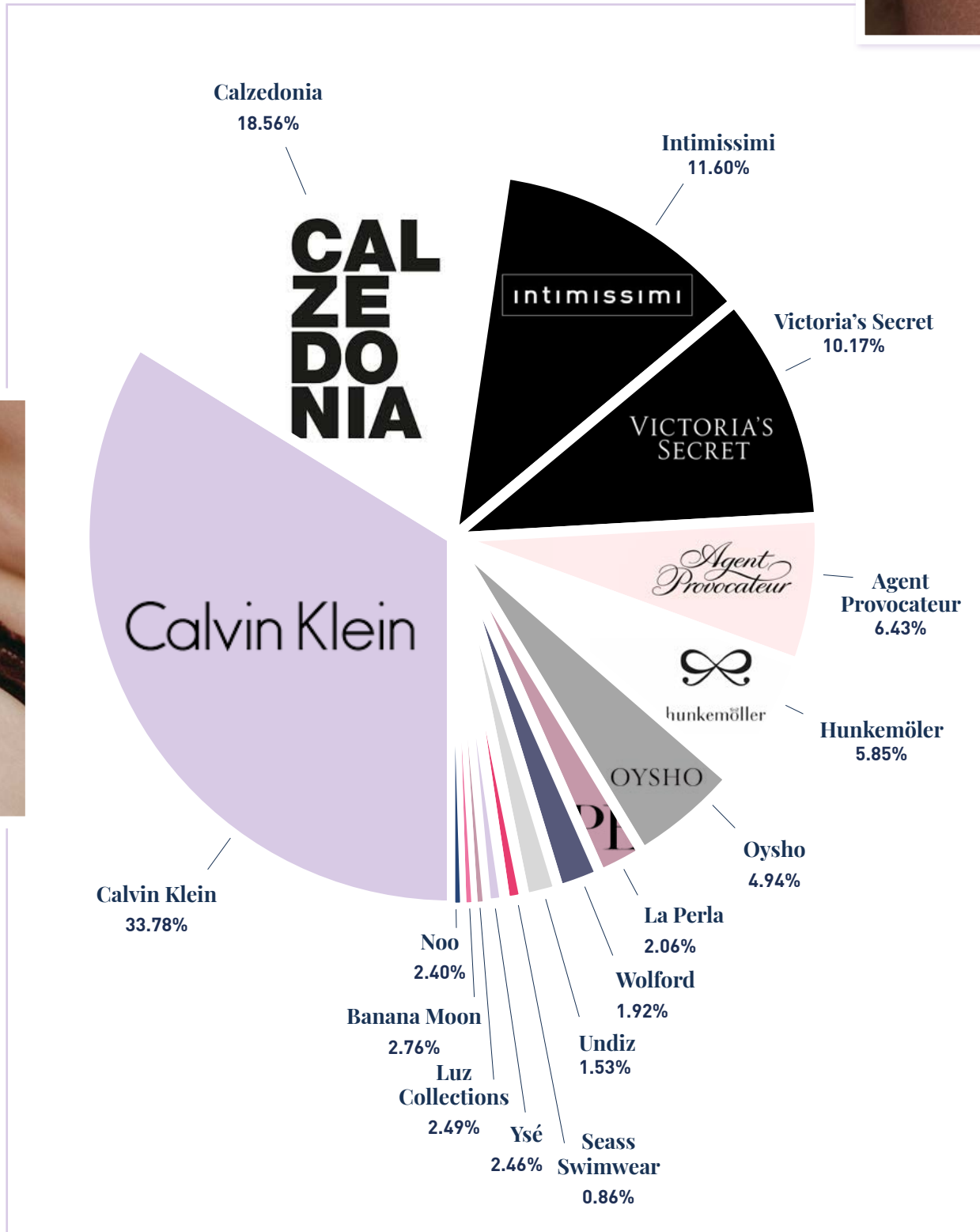
#calvinklein #calzedonia
#fashion #ootd #love #model
#victoriasecret #outfit
#style #photography #instagood

Posts



Lingerie

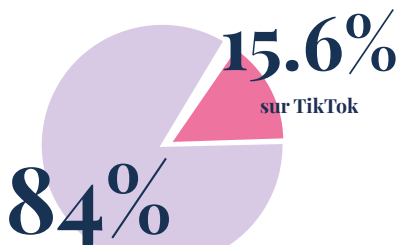
Share of voice of brands in terms of EMV (globally)
(top 15 EMV)



Accessories

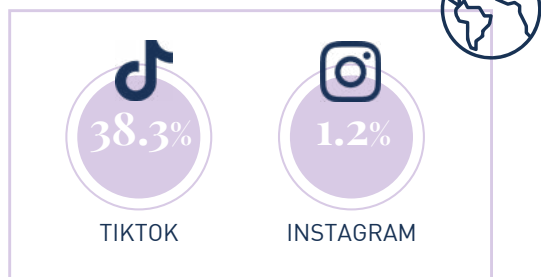
Overall :

69,377 posts



Engagement rate on Instagram

ENGAGEMENT RATE



WITH MORE THAN 2K HITS:

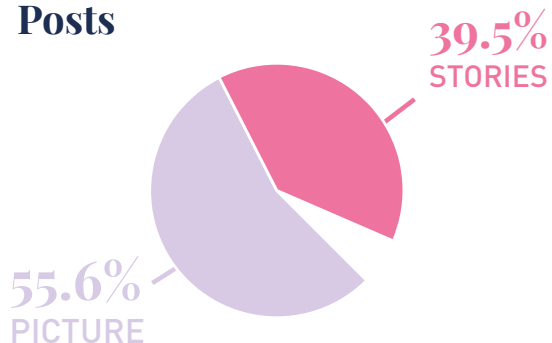


11,645 influencers



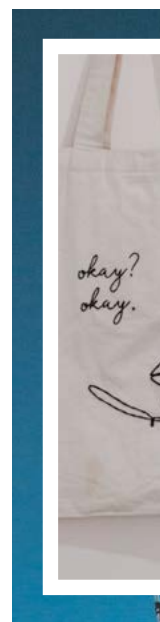
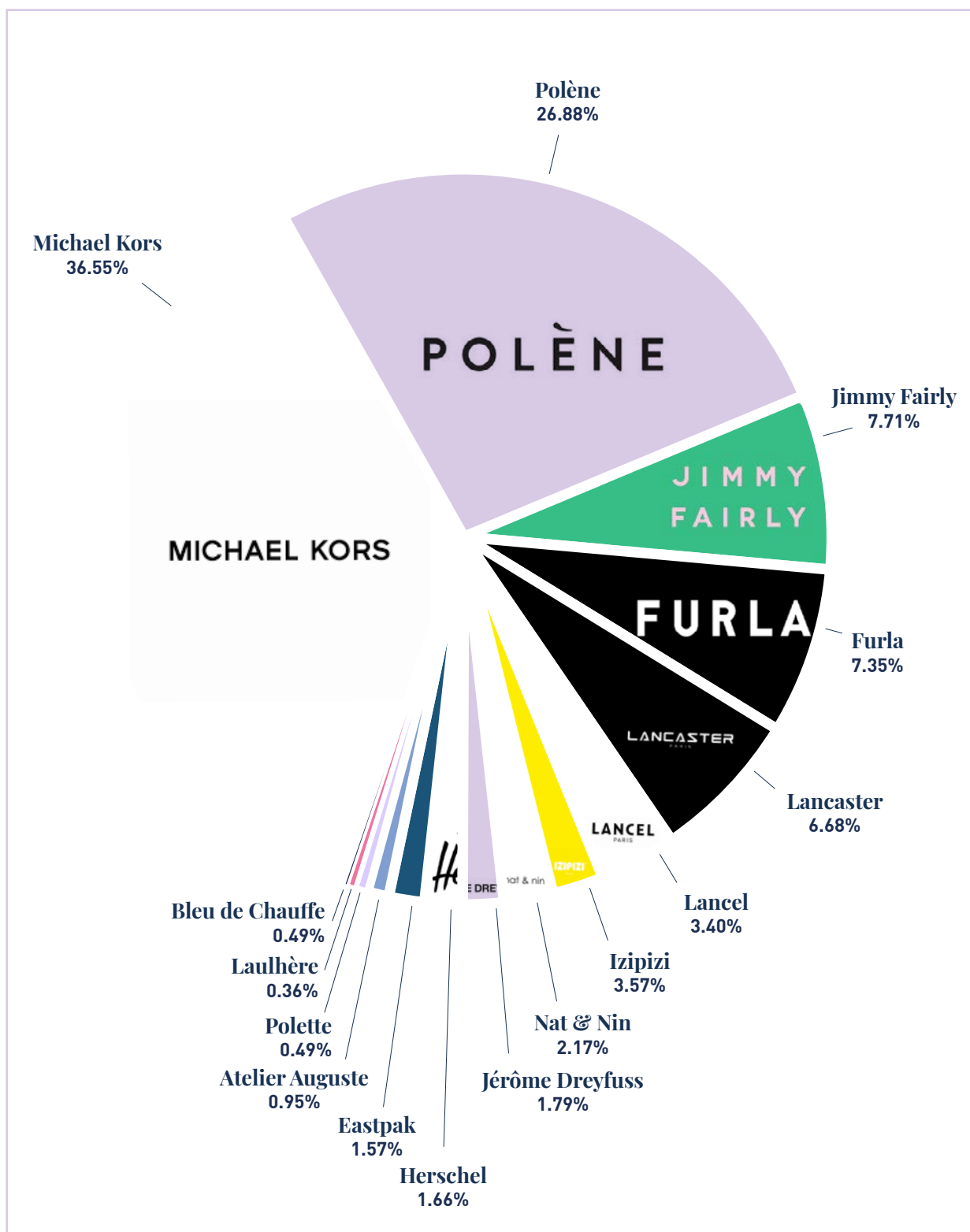
#outfitoftheday #lookdujour
#michaelkors #ootd #fashion
#fashionblogger #zara #look
#style #outfitinspiration #
#lookoftheday #outfit

Posts

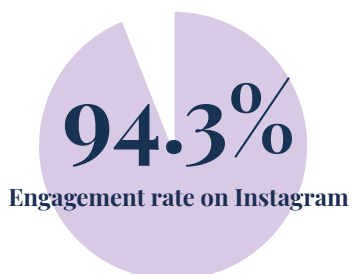


Accessories

Share of voice of brands in terms of EMV (globally)
(top 15 EMV)

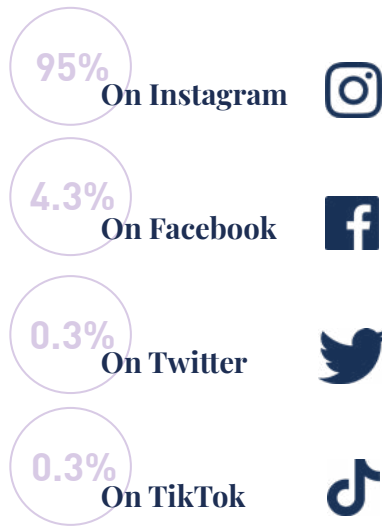


Jewelry

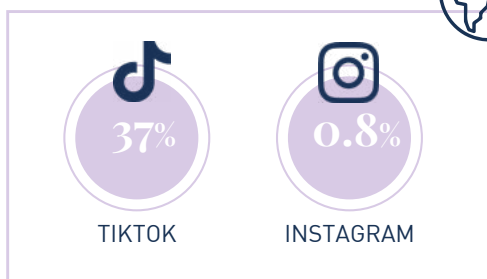


Overall :

94,185 posts



ENGAGEMENT RATE



WITH MORE THAN 2500 HITS

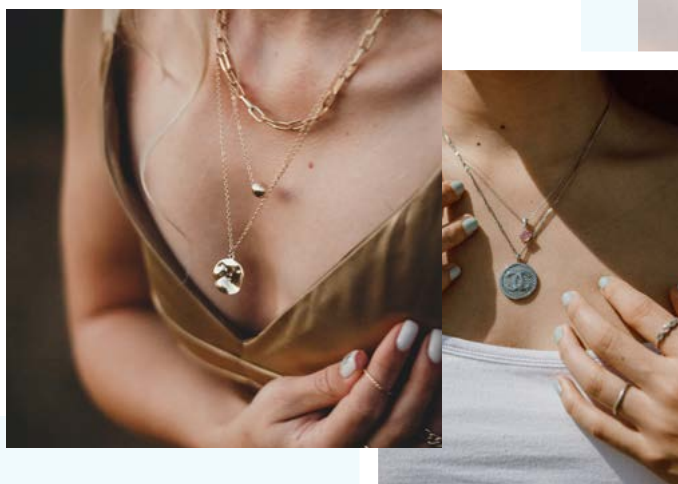
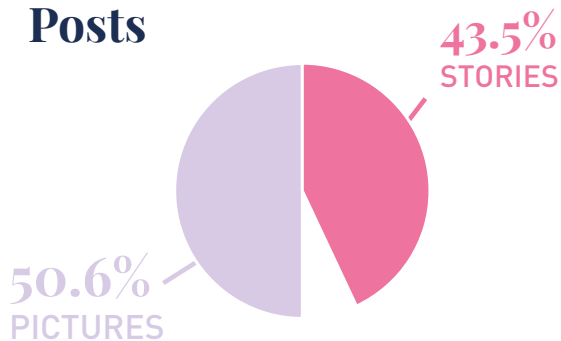


12,851
influencers



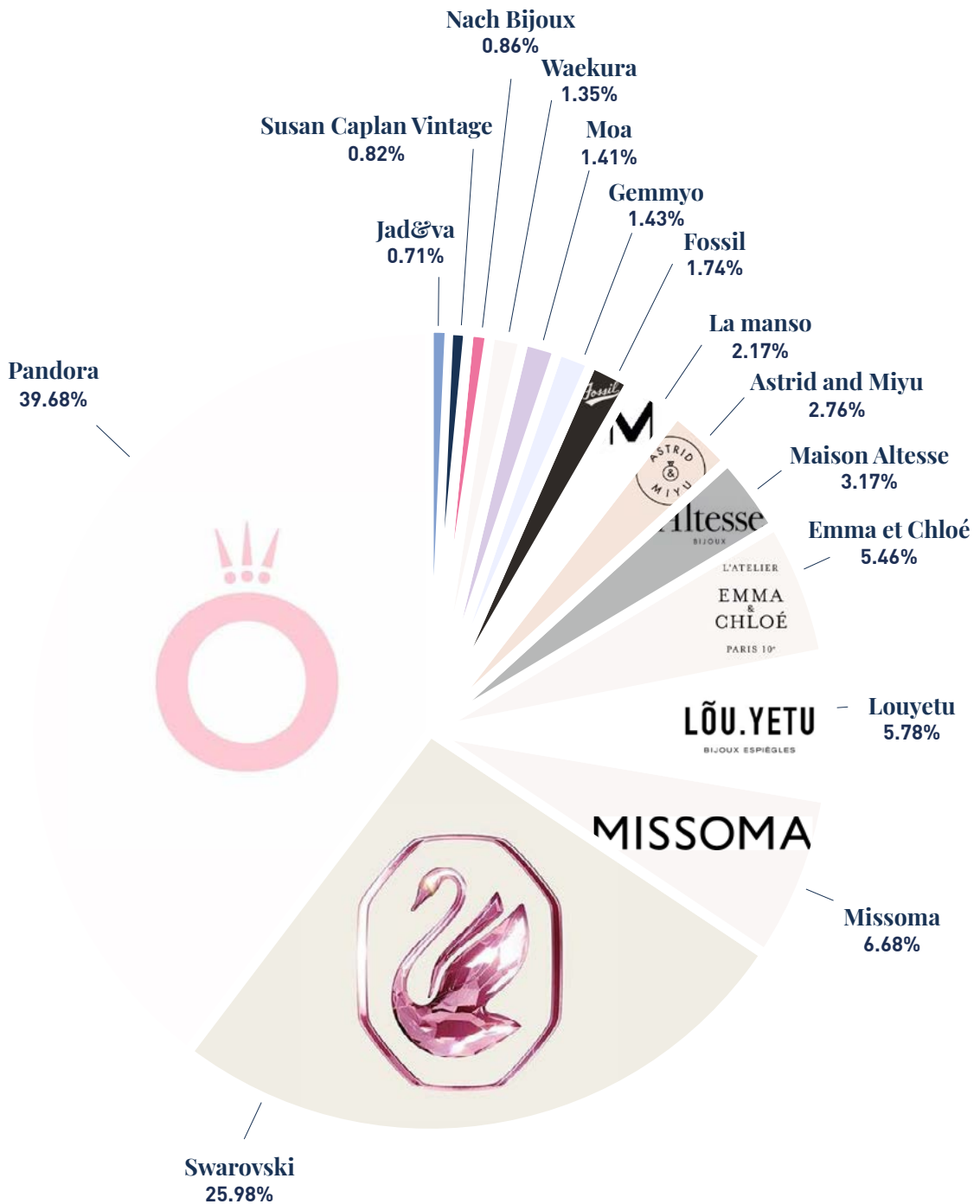
#madeinfrance #jewelry
#swarovski #pandora
#nails #fashion #love
#ootd #bijoux #nailart
#nailsofinstagram #nailstagram
#swarovskicrystals

Posts

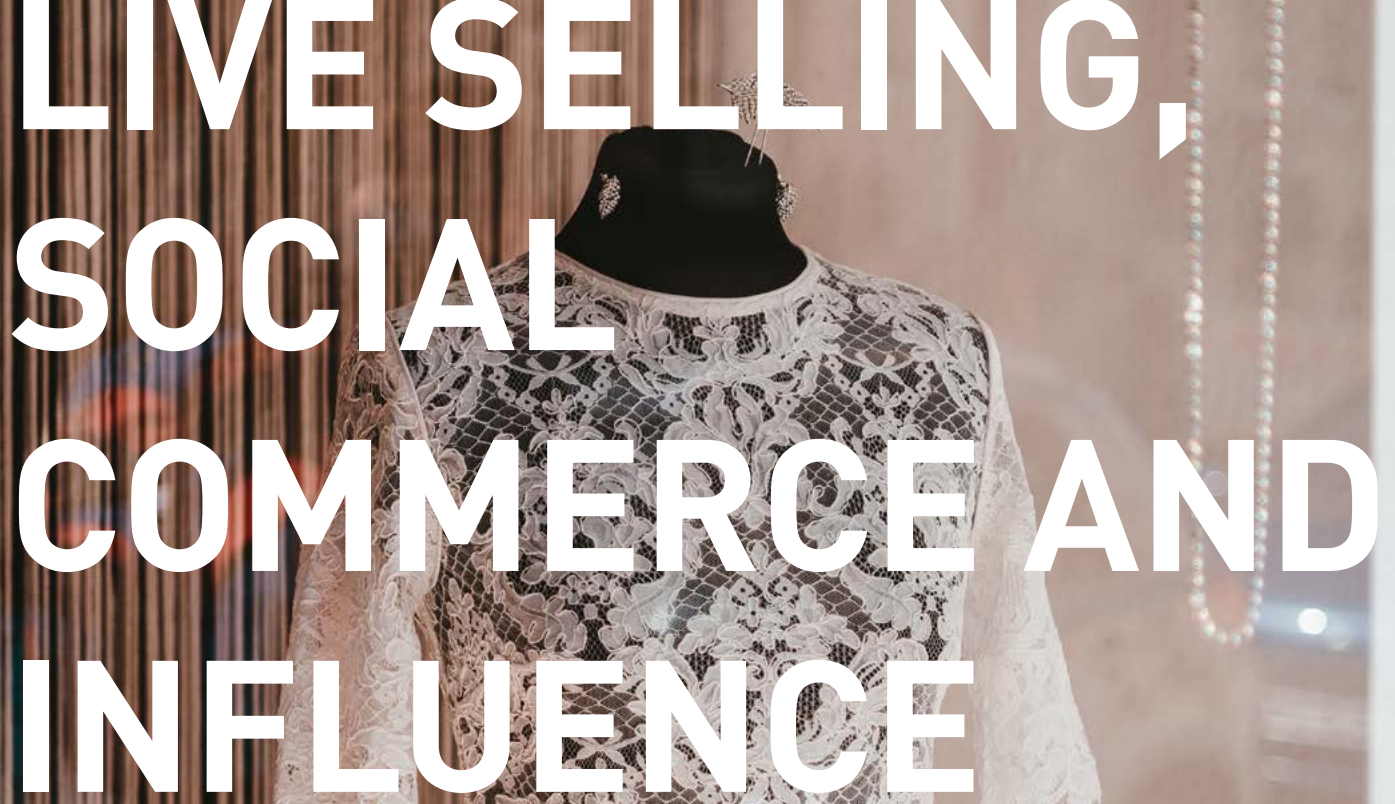


Jewelry

Share of voice of brands in terms of EMV (globally)
(top 15 EMV)



LIVE SELLING, SOCIAL COMMERCE AND INFLUENCE



02

The new codes of e-commerce in the fashion industry

After a year of dealing with a health crisis, brands are rethinking their digital strategy. Many of them realised the average time a user spent on social media increased in 2020 and seized the opportunity to focus even more on creating content for the mobile format.

Social Commerce is now a sales channel of its own, a winning combo coupled with Influence Marketing that has already proven its worth. Live formats are also at their peak and have been adopted by many luxury and prêt-à-porter brands. Here is a look at these new approaches and all the tools developed by social media to help brands grow and increase their sales.

Influence Marketing and Social Commerce: an obvious choice

While it is true that we go on social media to be entertained, we also look for inspiration, new brands and new products. KOL, whether they are macro or micro-influencers, bring authenticity and engagement to the heart of a brand's Social Commerce marketing strategies.

Influence Marketing, the driving force behind Social Commerce

Social Commerce simply means selling a product or service via social media.

Platforms are developing many Social Commerce tools, from **swipe-up links to product tags**. However, creating an online shop is not enough. Social Commerce **must be relevant and target the right community**. This is where it embraces Influence Marketing, which brings **authenticity, relevance and engagement**.

Research shows that 70% of shoppers have used Instagram **to discover products**, and 87% of people surveyed by Instagram have been **inspired by an influencer to buy a product**. Considering the increasing development of Social Commerce and social selling tools, partnerships with KOL and brand ambassadors are becoming even more relevant.

Social Commerce works because **it shortens the buying process considerably and minimises the obstacles that could prevent closing a sale**. Influence Marketing further streamlines this process and **creates engagement**. Consumers are also looking for authenticity while

becoming **less and less responsive to traditional advertising**.

Authenticity is what Influence Marketing brings to the table. The two strategies are complementary.

Influence Marketing makes Social Commerce grow, and Social Commerce increases Influence Marketing's effectiveness. Content creators also benefit from more visibility on the sales generate, it's a win-win strategy..

In the US, Social Commerce consumers grew by 25.2% in 2020 in comparison to 2019. Social Commerce accounted for 4.3% of e-commerce sales, a promising figure for a **new consumer habit**.

The health crisis has, of course, amplified this movement and pushed many brands **to change the way they communicate and sell**. Social media platforms used to **be the shopping display, but now they have become the shops themselves**. They are becoming a marketplace where people buy and sell, but also talk, comment and give advice. It is also an opportunity for brands to collect more data on their customers, based on a social selling logic.










Social Commerce: Which platforms and tools are best for the fashion industry?

As part of a campaign, a content creator can promote a brand's products using various tools that are now well known to brands, such as swipe-up, affiliate link, promotional code or takeover where an influencer takes control of a brand account.

Social media platforms are constantly developing new tools oriented towards Social Commerce. In the fashion industry, Instagram is still leading the way, in terms of both influencer collaborations and Social Commerce, in addition to offering the most sales tools. However, each platform has its own audience and particularities. TikTok, for example, is ideal for targeting Gen Z.



	 INSTAGRAM	 TIKTOK	 PINTEREST	 FACEBOOK
Product Identification				
Social Commerce tools	<ul style="list-style-type: none"> • Instagram Shopping (shops, guides, collections...) • Ads 	<ul style="list-style-type: none"> • TikTok for business • Ads • evry.link tool adds links in description 	<ul style="list-style-type: none"> • Sponsored pins • Shopify/ Creads Partnerships 	<ul style="list-style-type: none"> • Facebook Shops • Collections
Advantages	<ul style="list-style-type: none"> • Number 1 fashion platform • Aesthetics • Numerous Social Commerce tools • Live payment only in the US 	<ul style="list-style-type: none"> • Gen Z's platform of choice • Virality • New tool "catalogue" in the US and live streaming features to come 	<ul style="list-style-type: none"> • New Ideas Pins format • Inspiring platform 	<ul style="list-style-type: none"> • Large audience

SOCIAL COMMERCE FEATURES ON SOCIAL MEDIA





During the recent event «Instagram Presents: The Fashion & Beauty Edition», the platform presented the tools it believes fashion brands should use for Social Commerce, including 'Collections', which increased views for brands by 10%, 'Guides' and showing behind-the-scenes of a brand or a product.

This last point is becoming more and more relevant. Consumers today want more information and transparency, especially the materials and manufacturing process used.

Instagram's shopping features were created to offer brands the ideal showcase on social media:

- ✔ **Shops** - customisable shop displays
- ✔ **Product tags** - one-click purchase of the product seen in a post
- ✔ **Instagram Shop** - a separate tab to discover products and brands
- ✔ **Collections** - a tool to organise products by theme or season
- ✔ **Product site** - a place to give all the necessary information about a product
- ✔ **Product launches/drops** - a place to announce a launch and send reminders

In the US, brands have even more options on Instagram, including:

- ✔ **Featured products** in their posts or bio
- ✔ **Buy on Instagram** - a feature to pay directly in the app with Facebook Pay
- ✔ **Designer Shopping** - a feature to buy a specific look directly
- ✔ **Live Shopping** - a feature to buy live during a Live event





The Social Tourist, an example of successful Social Commerce

«**The Social Tourist**» is a partnership between Hollister and TikTok featuring Charlie and Dixie D'Amelio. The two sisters have become brand ambassadors and designers, with a dedicated site that offers limited editions and product selections every month. This is not their first collaboration with the brand, but this one combines all the codes of winning Social Commerce and engaging Influence Marketing:

- ✔ Products created with the two influencers that follow the codes of social media
- ✔ An exclusive character through limited editions
- ✔ A long-term contract with KOL and a wider partnership
- ✔ Behind-the-scenes insights into the brand
- ✔ An Instagram shop
- ✔ Multi-platform communication (Instagram, Facebook, TikTok...)
- ✔ Links to the site in the posts and bio of the content creators and brand
- ✔ Stories with swipe-up links
- ✔ And above all, product tags on each post for a shortened purchase path



Live shopping, the other asset of social commerce

Live shopping is an asset for Social Commerce. You want to be able to buy the products you see being worn live, and that changes everything by letting you interact with KOLs or brand designers to ask for advice. The live format is ideal for the fashion industry as it uses the same demonstration principle. Again, networks are developing new features to allow the live format to grow.



The explosion of Lives in the fashion industry

While in the Western world Live Shopping is still in its infancy, it is a proven success in China. Alibaba popularised the format with Single Days, bringing together hundreds of celebrities, CEOs of major brands, and more than 300 million users at the time.

Research shows that 60% of Chinese consumers would be willing to buy a product highlighted by a content creator, and **the live stream format** is therefore **traditionally coupled with the intervention of KOL**.

Live Shopping and Social Commerce tools are numerous in China: **Taobao**, oriented toward C2C; **Tmall**, which is primarily B2C; **Xiaohongshu**; and of course, **Douyin**. It is also worth mentioning **Pin Duoduo**, a platform that offers promotions for group purchases between friends.

In China, **«hosts» are content creators and influencers who become presenters for brands**. A great example is **Viya Huang**, who is probably the most well-known KOL who garners millions of views. Luxury brands from **Louis Vuitton to Dior** no longer hesitate **to explore this combination of Live Shopping and Influence Marketing** to sell in the Asian market. Shanghai has gone as far as creating, in parallel with its Shopping Festival, a Live Shopping festival with more than 10 e-commerce platforms and thousands of products.

Globally, the live streaming market should reach 25 billion dollars by 2023. In China, it already reached \$125 billion last year. While it is true that **the phenomenon was aided by the health crisis**, it does not currently seem to be leading the way. In fact, for the moment, it is less integrated into users purchasing practices in both US and Europe. Rumour has it, particularly in the fashion world, that a period of «revenge buying» may be on the horizon as we return to normal life.



How to use the live shopping feature

A live shop certainly allows brands to sell products, but also it gives consumers a glimpse behind the scenes of a brand. Likewise, it provides an opportunity to talk about something else, offer exclusivity, interact with a community, tell a story or broadcast a fashion show. In short, it adds incredible value.

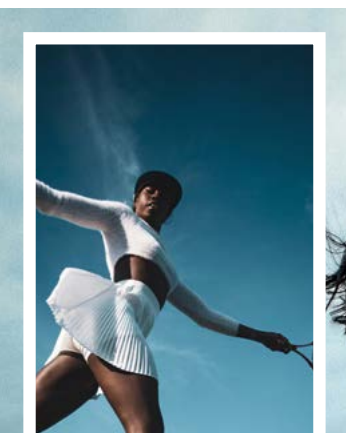
Involving **one or more KOL** allows you to give more visibility to your brand, work on branding, and bring more engagement and authenticity.

Setting up a live shopping session is not necessarily simple for a brand. It **requires production and animation skills**, but also **technical resources** that are often not available in-house. A great number of solutions exist to create live shopping sessions. With **Livescale**, for example, advertisers can take advantage of **production tools and purchasing features**. Moreover, they can **directly broadcast live on social media** or their own website.

Taking a closer look on social media platforms, **Western brands** are led not only by **Facebook Live**, **Instagram Live** and **Amazon Live**, but also **TikTok** and **YouTube**. For the moment, not all social media platforms that offer a live option also offer live shopping features.

What are the advantages?

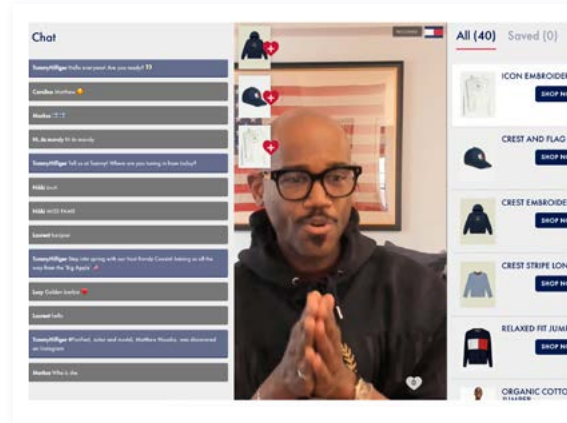
 <p>INSTAGRAM LIVE</p>	<ul style="list-style-type: none"> • Live Shopping features • Audience • No requirements to create a Live • Monetization • Leading fashion platform
 <p>FACEBOOK LIVE</p>	<ul style="list-style-type: none"> • Live Shopping features • Audience • No requirements to create a Live • Monetisation
 <p>TIKTOK</p>	<ul style="list-style-type: none"> • Audience • Live monetization • Live Shopping features being tested • Requirements to create a Live: have more than 1,000 followers
 <p>YOUTUBE</p>	<ul style="list-style-type: none"> • Audience • Monetization • Future Live Shopping features announced
 <p>AMAZON LIVE</p>	<ul style="list-style-type: none"> • Shopping platform • Live Shopping features • Requirement to create a Live: be a seller • Amazon or be part of the Amazon Influencer Program



Examples of Live Shopping are numerous nowadays. We have seen that shopping centres and retailers are launching their own live events. Good examples are Walmart or the marketplace Moda Operandi, which has announced a **Moda Live**.

Both in the luxury and prêt-à-porter sectors, fashion brands are preparing to operate with this new format. For instance, the Swedish brand **Lindex**, used the live format to announce its new collection while taking viewers on a journey to the beaches of Sweden. According to the brand, the live format led to a 55% increase in product additions to the shopping cart. The same goes for **Tommy Hilfiger**, which presented its new collection in a **Tommy Live** event with various KOL's invited for a discussion.

We can also see social media platforms getting involved. For example, in collaboration with several brands, **Facebook** is launching «**Live Shopping Friday**» from May to July 2021 on the themes of fashion, beauty and skincare. TikTok has reorganized its «**TikTok Fashion Month**» in February 2021, which also took place last September: a month-long virtual event with luxury brands, collaborations, content creators and celebrities.



SOME INGREDIENTS FOR A SUCCESSFUL LIVE SHOPPING EVENT

- ✓ **Communication in advance.**
- ✓ **Guest KOL or live hosts.** They represent your brand, bring their community and their creativity, have an opinion to give, host the live event or come and talk about another subject.
- ✓ **Product Experts.** They are often the best people to answer specific questions from viewers.
- ✓ **Targeted content adapted to the community and each platforms' codes.**
- ✓ **Good technical preparation by internal or external resources.**
- ✓ **Entertainment and interactivity.** To answer viewers' questions, but also why not give them the chance to win products, test their knowledge, etc.
- ✓ **Spontaneity and authenticity.** There is no set script in a live show because viewers are looking for authenticity and transparency for real reactions and opinions.
- ✓ **Exclusives, promotions, backstage to give added value.** If a live show allows you to sell a product or present a collection, it can also be an opportunity to tell the story of the brand, present a product preview... Exclusivity is always appreciated.

Social Commerce and Influence Marketing in China

Social Commerce and Livestreaming are already established trends in the APAC market. While some brands are already selling in the Chinese market, those that are not able to do so are also well advised to follow this market, where new e-commerce trends are emerging.

The success of Influence Marketing in the Chinese market

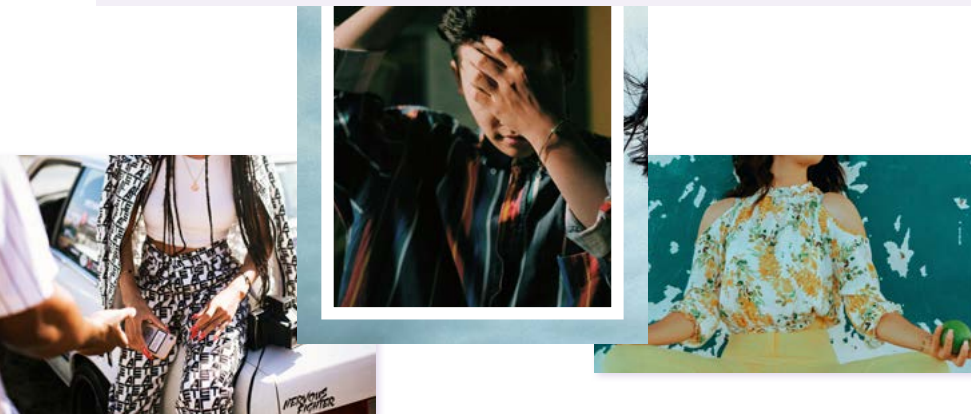
Influence Marketing in China is inseparable from Social Commerce and is widely used in the fashion industry. It is also the best strategy for an international brand seeking to break into the Asian market. Good examples of this are Douyin and WeChat KOL, as they already know their market.

The Michael Kors «City Catwalk» hashtag challenge, **one of the first collaborations between luxury brands and Influence Marketing, took place on Douyin**. The brand recruited three influencers, including Chinese celebrities **Mark Chao** and **Yang Mi**, for a challenge that produced over 6 million views and 30,000 user-generated content shares.

This is important when you consider that the **algorithm on Douyin, like that of TikTok, highlights**

accounts that have fewer subscribers. The result is that content generated by an average user can very well go viral. This is **the main reason for the success of nano and micro-influence in the Chinese market**. Since virality is random, we might as well focus on different targeted profiles with fewer subscribers.

However, **Chinese macro-influencers** are still in demand, especially for livestreaming. **Tao Liang**, also known as Mr. Bags, sold 80 Givenchy bags on WeChat in 12 minutes. Another example is **Viya - 薇娅**, an ambassador of several brands with millions of subscribers on WeChat, Weibo, Douyin and Weitao. She set records in 2020 by generating over \$365 million in sales in one day. She is also a committed KOL as she promotes products from less wealthy parts of China.



Why do KOL's sell more in China?

It is principally due to the fact that the use of mobile phones in China is even more pronounced than in western countries. Facebook and Google don't exist, but WeChat does. On the app, you can do everything from booking tickets to dating. Ordering online is a common practice. Secondly, KOL have strong prescriptive power because users trust them. Thirdly, the whole ecosystem of online sales is highly developed, including e-commerce tools and platforms.

Moreover, the line between social media and marketplaces no longer really exists.

✔ Douyin

The Chinese TikTok, now well known to all. Short videos, livestreams, and the possibility to integrate commercial links to Taobao or Tmall.

✔ WeChat

The biggest Chinese social media platform, which offers a lot of features, including reservations, livestream and payment tools.

✔ Tmall

B2C marketplace where brands sell their products. A sub-section of the site, «Luxury Pavilion», is solely dedicated to luxury brands

✔ Taobao

A marketplace that is more focused on sales between individuals or smaller sellers. The platform also offers a livestream section.

✔ Pinduoduo

A group buying site that also includes similar features to a social media platform.

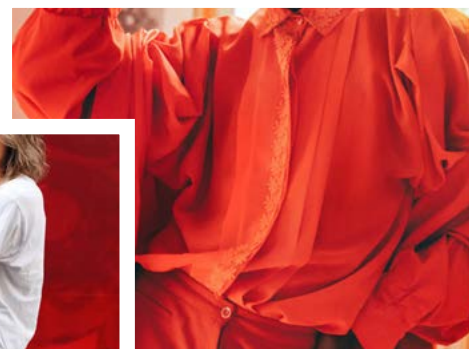
✔ Kuaishou

A video-oriented social network similar to TikTok. Lives and product presentations work very well on Kuaishou, but collaborations with e-commerce platforms, less so.

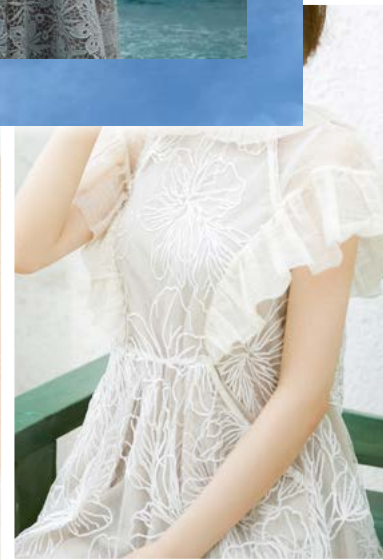
✔ Weibo

Very popular network of the Alibaba group which also owns Yizhibo, a livestream platform.

Douyin is one of the most well-known platforms and it provides brands with the possibility of selling. **An affiliate link can be embedded in a video and if the user replays the video, a banner reminds them of the link to the product. The links**, especially those shared by KOL, usually refer to Taobao, which has partnered with Douyin. The platform also offers an in-app e-commerce system so that users can purchase their products without leaving the application, a system less used by big brands and favoured by users and retailers.



DATA TO MEASURE ROI



03

Brands know today that data is essential to break into Influence Marketing. The performance of Influence Marketing depends greatly on the relevance of the KOL selected for a campaign.

Apart from offering consumers content that is relevant to them, data is essential to build new campaigns and measure their success.



03

Data to optimise ROI

Data makes it possible to bypass the obstacles of transparency and ROI measurement. It responds to the major challenges of the moment, particularly those of nano-influence, which require access to a large amount of data to target the right profiles. Data is at every stage of an influencer campaign, and without it, it is impossible to measure the campaign's performance and learn from each one.

With metrics such as the number of subscribers, the engagement rate and audience characteristics (gender, age, location, interests), brands can quickly target the best content creators to achieve their goals and optimise their ROI.

It gives them the opportunity to target the right influencers, ensure that their community is real, and check that they have positive engagement. Although not everything can be measured, the chosen KOL must be aligned with the brand's values and willing to create content for it.

03

How to measure the ROI of Influence Marketing:

Measuring the ROI of your Influence Marketing campaigns means first and foremost defining the right KPIs. Different types of indicators can be used to measure the brands' performance:

✓ THE REACH

The measure of the total number of different people exposed to the campaign.

✓ IMPRESSIONS

The number of views of a post, a story or a video.

✓ ENGAGEMENT

The interactions with posts e.g. the number of comments, likes and shares. It allows us to measure a cost per engagement.

✓ ENGAGEMENT RATE

This can be compared to your brand account or the KOL's account.

✓ TRAFIC

The amount of traffic to the brand's site or account.

✓ GENERATED CONVERSIONS

Conversions produced as a result of the campaign through the influencer.

✓ AUDIENCE STATISTICS

Explains who interacted with the post and who converted.

✓ EARNED MEDIA VALUE (EMV)

An indicator that measures the success of an influencer campaign in financial terms.

For many brands in the fashion industry, **the measurement of ROI is based on the number of conversions**, and therefore, sales. It is important in this case to set up a way to measure conversions for each campaign and each influencer. A promotional code or an affiliate link are the most-used tools in general. The redirection URLs used in influencer campaigns can be tracked by an adserver, such as Google's Campaign Manager, or by a site-centric tool like Google Analytics, Xiti or Adobe.



FASHION BRANDS AND SOCIAL MEDIA TRENDS 04

When KOL launch their brands...

The phenomenon is not new. The Italian influencer **Chiara Ferragni** already launched her eponymous brand in 2013. This trend is gaining momentum as **content creators are now beginning to launch their own brands**. Most importantly, we understand them. **They are often creative, seasoned entrepreneurs who are conscious of their own personal branding and knowledgeable about trends while staying attentive to their communities.** They already have **a significant reach with their followers and know how to communicate and sell on social media.**

Deeksha Khurana, with almost 500k followers on Instagram, has created «**Dee Clothing**», a trendy unisex brand. **Sabina Socol**, a well-known figure in the industry, recently launched «**Pujka**»: a brand in her own image, a women's collection between luxury and prêt-à-porter. Others do not necessarily come from the fashion world. **Fasbeam**, a group of well-followed motorbike vloggers, created «**FK-R**», a brand of jackets, gloves and accessories for bikers. The biggest challenge for these influencers, who turn into designers, is to make their brand known beyond their community.





04

What if brands co-create with KOL?

Beyond the fact that KOL are launching their own brands, it is important to understand that more than ever, they are expressing their ideas and their creativity rather than simply transmitting an imposed message.

Brands have understood this and are not hesitating **to offer KOL the opportunity to create capsule collections**. For the summer of 2021, capsule collections of swimwear between influencers and brands are increasing in number. Good examples are **Pauline Torres**, 350K Instagram followers, with the brand **Seass Swimwear**; **Milky Ways Blue Eyes**, 213K Instagram followers; and **Kaly Ora**.

Different types of collaborations exist to create a capsule collection. An influencer may create a collection from scratch, intervene at certain stages of production, or simply select their favourite products. Nevertheless, the most important thing is that the influencer is truly involved and free to make his or her own choices in order to provide original and authentic results.

These capsule collections are often limited editions and are very popular with the KOL community. Why do they work? Firstly, because the brand gives the influencer real creative freedom so the KOL is happy to talk about the collection he or she has created and that represents his or her own style. The capsule collection, and therefore the brand, benefits from the influencer's commitment and reach. KOL really know what they like, and more importantly, what their community likes, but they also bring market knowledge. **The limited nature of this type of collections contributes to its exclusivity and often leads to product selling out.**

Vlogs and video: The winning formats

The rise of TikTok and Reels shows that short video formats are the new trend. As they are less edited than a photo and more vivid, they continue to engage users. Videos are predicted to represent nearly **80% of internet traffic** by 2022. It is therefore a format to be integrated into any Influence Marketing collaboration, especially since there is plenty of choice:

- ✓ **TikTok** only offers video format. The best option for combining engagement and virality.
- ✓ **Instagram** offers different video formats. Reels have exploded in recent months, based on the same principle as TikTok. Stories also allow you to share ephemeral video content. IGTV is ideal for a longer, more detailed format, especially for product reviews or the presentation of a new collection.
- ✓ **Facebook** also offers the story format and the video format.
- ✓ **Youtube** is still widely used in the fashion and beauty industry.
- ✓ **Live videos** are very popular on all platforms, including TikTok, Instagram, Youtube and Facebook.
- ✓ **Augmented reality** brings a new dimension for the video format, and it could also be advantageous for the fashion industry.

Vlogs are just as trendy. Originally exclusive to YouTube, they are now popular on all social media platforms. The principle: film your daily life, a trip, a DIY project. This format without filters immerses viewers in the daily life of a KOL or a brand, providing authenticity and compelling storytelling that is always appreciated.





04

Greener, more inclusive and more Social Fashion: Trends for more ethical fashion

On social media, consumers are expressing themselves, particularly concerning environmental and social issues. Instagram and TikTok are not only bringing out new trends but they are also creating debates on new subjects in the fashion industry. The classic contrast between fast fashion and conscious fashion is a bit more complex. Big brands are making an effort to be more sustainable but consumers still want low prices and fast delivery.

Many KOL are now committed to **green fashion**, offering **#diy** or **#upcycling** content to their followers, including «**green influencers**» like **@coline**, 375K followers. These are influencers who tend to choose the brands they work with for **their values**. The **#slowfashionmovement** hashtags show the craze for this new way of **consuming less, but better**. This creates an opportunity for ethical fashion brands and second-hand clothing platforms, as they are able to find content creators who agree with their values.

The same goes for **inclusivity** issues, whether we are talking about **unisex, LGBTQIA+, all sizes or all genders**. Trans influencer **Nutt Nisamanee** has seen an explosion of requests for partnerships from brands that are now seeking to be more inclusive and representative. On TikTok, the hashtag **#bodypositive** has accumulated 3,9 billion views. **This represents a grassroots movement that advocates self-acceptance and moves away from the traditional catwalk ideals.**



Conclusion

Many fashion, accessories, jewelry, sportswear and luxury brands are working with creative and engaging KOL as well as implementing Influence Marketing strategies. In 2021, **90% of advertisers** believe that Influence Marketing works. While the Influence Marketing industry is growing and becoming more structured, KOL are becoming more professional and collaborations more transparent. This marketing strategy has proven to be essential for advertisers who want to boost their sales, improve their image or reach new audiences. Thanks to Kolsquare, brands benefit from a technological solution that optimises each stage of their campaign, from targeting the most relevant influencers to measuring their performance.

