This study analyses Fashion brands and their relationship with social media. The study looks at the share of voice and e-reputation of a sample of ready-to-wear and luxury fashion brands, whilst also examining what motivates fashion bloggers to get involved with branded content campaigns. The study also focuses on Etam, and a recent integrated marketing campaign with a strong social media bias; assessing what made this particular campaign so successful.
Why focus on Fashion?

Looking at media consumption on the internet, Nielsen has demonstrated that internet users spend up to 5 x more time on blogs & communities (social media) than on news-related sites (traditional media).

Though social media sites may be considered powerful they remain difficult to fully understand as they are comprised of millions of sources that are continually evolving, being created or ceasing to be active. We must use advanced semantic technologies in order to analyze what is happening.

As it turns out, more than 4% of content published on social media platforms is related to fashion, which makes it one of the most highly represented themes on the web today.

Frédéric Montagnon
Strategy Director
Ebuzzing

Olivier Billon
President
Ykone
Contents

I. BRAND SHARE OF VOICE IN EUROPE ........................................................................................................... - 4 -
   A. READY-TO-WEAR BRANDS ........................................................................................................................ - 4 -
   B. LUXURY BRANDS ....................................................................................................................................... - 6 -

II. FACEBOOK BRAND PAGE CLASSIFICATION .......................................................................................... - 8 -

III. HOTTEST FASHION BLOGS ....................................................................................................................... - 9 -
   A. CONSISTENT PERFORMERS ......................................................................................................................... - 9 -
   B. THE TOP 3 RISING BLOGS ....................................................................................................................... - 9 -
   C. THE TOP 3 NEW ENTRIES FOR 2011 ........................................................................................................ - 10 -

IV. TESTIMONIAL: FASHION BLOGGER VS. THE BRAND ........................................................................... - 11 -

V. FOCUS ON ETAM ......................................................................................................................................... - 13 -
   A. BREAKING DOWN THE STEPS TAKEN ....................................................................................................... - 13 -
   B. CRITICAL ASSESSMENT: THE FASHION SHOW ENABLED ETAM TO EXTEND ITS CONVERSATIONAL ARENA ............................................................................................................................ - 16 -
   C. THE BLOG COMMUNITIES THAT PUBLISHED ARTICLES REGARDING ETAM ........................................... - 17 -
   D. RESULTS AND CONCLUSION: .................................................................................................................. - 17 -

VI. ABOUT US ............................................................................................................................................... - 19 -

   ABOUT EBUZZING: ...................................................................................................................................... - 19 -
   ABOUT YKONE: ........................................................................................................................................... - 19 -

APPENDIX: LIST OF BRANDS STUDIED ..................................................................................................... - 20 -
I. Brand share of voice in Europe

The study was prepared based upon:

- an analysis of 50 million articles appearing on 3 million sources (blogs & information sites) in 5 languages.
- first quarter 2011.

The distribution of share of voice has been calculated on the number of references for each brand weighted against the relative influential strength of the media source on which the article appears.

A. Ready-to-wear brands

H&M has high visibility in all of the countries studied. Zara’s notoriety extends throughout the studied territory with the exception of the United Kingdom. On average, 80% of the articles published in the 5 countries came from blogs.

**United Kingdom**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOC ShoP</td>
<td>19%</td>
</tr>
<tr>
<td>H&amp;M</td>
<td>11%</td>
</tr>
<tr>
<td>Primark</td>
<td>10%</td>
</tr>
<tr>
<td>Diesel</td>
<td>8%</td>
</tr>
<tr>
<td>New Look</td>
<td>7%</td>
</tr>
<tr>
<td>Zara</td>
<td>5%</td>
</tr>
<tr>
<td>River Island</td>
<td>4%</td>
</tr>
<tr>
<td>Debenhams</td>
<td>5%</td>
</tr>
<tr>
<td>Dorothy Perkins</td>
<td>4%</td>
</tr>
<tr>
<td>Jules</td>
<td>3%</td>
</tr>
<tr>
<td>Other brands</td>
<td>23%</td>
</tr>
</tbody>
</table>

With 19%, **Topshop** is well in front of **H&M** and **Primark**, being the most referenced brand on blogs and media sites.

**France**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mango</td>
<td>6%</td>
</tr>
<tr>
<td>Zara</td>
<td>16%</td>
</tr>
<tr>
<td>Diesel</td>
<td>5%</td>
</tr>
<tr>
<td>New Look</td>
<td>5%</td>
</tr>
<tr>
<td>Etam</td>
<td>6%</td>
</tr>
<tr>
<td>Levis</td>
<td>4%</td>
</tr>
<tr>
<td>Pimkie</td>
<td>4%</td>
</tr>
<tr>
<td>Sandra</td>
<td>3%</td>
</tr>
<tr>
<td>Maje</td>
<td>3%</td>
</tr>
<tr>
<td>Other brands</td>
<td>21%</td>
</tr>
<tr>
<td>H&amp;M</td>
<td>27%</td>
</tr>
</tbody>
</table>

- 4 -
Due to its fashion show being aired on social media sites, Etam occupies the **fourth position in the France top 5** most referenced brands in articles when compared to its competitors ... (see below in "Focus on").

**Germany**

![Pie chart](image1)

- H&M: 35%
- Zara: 12%
- Mango: 6%
- Diesel: 7%
- Primark: 7%
- Topshop: 5%
- Vero Moda: 3%
- Morgan: 2%
- Pimkie: 2%
- Other brands: 19%

**Spain**

![Pie chart](image2)

- Zara: 27%
- H&M: 17%
- Mango: 15%
- Stradivarius: 6%
- Bershka: 5%
- Topshop: 4%
- Primark: 4%
- Pull & Bear: 2%
- Levi's: 2%
- Diesel: 2%
- Other brands: 17%

**Italy**

![Pie chart](image3)

- H&M: 35%
- Zara: 12%
- Mango: 6%
- Diesel: 7%
- Primark: 7%
- Topshop: 5%
- Vero Moda: 3%
- Morgan: 2%
- Pimkie: 2%
- Other brands: 19%
B. Luxury brands

Chanel is visibly the most highly referenced brand on social media sites. Italy is the only country in which Chanel does not dominate in the presence of four Italian brands (Dolce e Gabbana, Prada, Gucci and Roberto Cavalli).

**United Kingdom**

- Chanel: 14%
- Prada: 8%
- Burberry: 7%
- Dior: 7%
- Gucci: 7%
- Marc Jacobs: 6%
- Karl Lagerfeld: 4%
- Dolce & Gabbana: 4%
- Yves St Laurent: 5%
- Giorgio Armani: 6%

**France**

- Dior: 14%
- Chanel: 13%
- John Galliano: 8%
- Karl Lagerfeld: 7%
- Yves St Laurent: 5%
- Gucci: 5%
- Prada: 3%
- Burberry: 3%
- Marc Jacobs: 4%
- Giorgio Armani: 5%

**Italy**

- Giorgio Armani: 12%
- Gucci: 8%
- Dolce & Gabbana: 8%
- Valentino: 4%
- Dior: 4%
- Versace: 5%
- Roberto Cavalli: 5%
- Prada: 7%
- Benetton: 6%
Spain

Other brands: 41%
Dolce & Gabbana: 4%
Yves St Laurent: 4%
Marc Jacobs: 4%
Versace: 4%
John Galliano: 4%
Gucci: 7%
Giorgio Armani: 7%
Prada: 6%
Dior: 8%
Chanel: 11%

Germany

Other brands: 32%
Yves St Laurent: 4%
Karl Lagerfeld: 5%
Gucci: 5%
Giorgio Armani: 5%
Marc Jacobs: 6%
Joop: 6%
Prada: 6%
Dior: 8%
Calvin Klein: 6%
Chanel: 15%
II. Facebook brand page classification

<table>
<thead>
<tr>
<th>Facebook Page</th>
<th>Number of fans</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZARA</td>
<td>10 Million +</td>
</tr>
<tr>
<td>H&amp;M</td>
<td>8 Million +</td>
</tr>
<tr>
<td>LEVI'S</td>
<td>9 Million +</td>
</tr>
<tr>
<td>ROXY</td>
<td>1 Million +</td>
</tr>
<tr>
<td>ED HARDY</td>
<td>1 Million +</td>
</tr>
</tbody>
</table>

With more than 10 million fans, Zara leads other ready-to-wear brands by a wide margin in terms of total number of fans, giving it a veritable “community display window” for its brand image.

In 2nd place, with over 8 million fans, H&M is more active than Zara on its Facebook page, offers more developed content and obtains a greater number of responses. Nonetheless, Zara receives, on average an interaction rate for each post that is four times greater than that of H&M (8,000 likes and comments per post and 2,000 likes and comments per post respectively).

The interaction with its «Facebook fans» emphasizes its desire to develop client loyalty and to create a relationship with its target. It is an effective guarantee for H&M to obtain sustained visibility on the web.

You can use Ebuzzing Labs to check out the evolution of different fashion brands Facebook pages by going through the brand rankings specific pages.
III. Hottest fashion blogs

The Ebuzzing Top Blog rankings, (formerly Wikio blog rankings) provide a list of the 100 most influential blogs covering 41 themes and in 5 languages each month. In order to prepare the rankings, our R&D team develops algorithms and tools that identify the blogs that originate information or a discussion. We continually study and measure over 3 million blogs and media outlets as well as recommendations proposed on social media sites.

Over the past 5 years, Ebuzzing has developed specific expertise regarding blog behavior. The algorithm used by our R&D department allows us to:

- Detect the most influential blogs (top ranking)
- Monitor their activity and progression in the ranking (rising blogs)
- Identify new entries on the fashion rankings

A. Consistent performers

<table>
<thead>
<tr>
<th>Blog</th>
<th>Wikio Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>The cherry blossom girl</td>
<td>1</td>
</tr>
<tr>
<td>Garance Doré</td>
<td>2</td>
</tr>
<tr>
<td>Punky B's fashion Diary</td>
<td>3</td>
</tr>
<tr>
<td>Comme un camion</td>
<td>4</td>
</tr>
<tr>
<td>Miss Pandora</td>
<td>5</td>
</tr>
<tr>
<td>MARIEluvPINK</td>
<td>6</td>
</tr>
<tr>
<td>Le blog de Big Beauty</td>
<td>7</td>
</tr>
<tr>
<td>Et pourquoi pas Coline</td>
<td>8</td>
</tr>
<tr>
<td>CHIFFONS and Co</td>
<td>9</td>
</tr>
<tr>
<td>Café Mode</td>
<td>10</td>
</tr>
</tbody>
</table>

The top 10 blogs have been the same for at least 6 months.

B. The top 3 rising blogs

<table>
<thead>
<tr>
<th>June rankings</th>
<th>Blog</th>
<th>1st quarter 2011 gains</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>DAME SKARLETTE</td>
<td>+ 182 places</td>
</tr>
<tr>
<td>27</td>
<td>Will you meet my fashion-eye</td>
<td>+ 210 places</td>
</tr>
<tr>
<td>32</td>
<td>Un Oeil sur la Mode</td>
<td>+ 295 places</td>
</tr>
</tbody>
</table>
### C. The top 3 new entries for 2011

<table>
<thead>
<tr>
<th>June rankings</th>
<th>Blog</th>
<th>1st quarter 2011 gains</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>Eva’s Blog</td>
<td>February</td>
</tr>
<tr>
<td>52</td>
<td>You make Fashion</td>
<td>April</td>
</tr>
<tr>
<td>102</td>
<td>Le Comptoir de Laura</td>
<td>March</td>
</tr>
</tbody>
</table>

Data from Ebuzzing rankings between 01/01/2011 and 30/06/2011
IV. Testimonial: Fashion Blogger vs. The Brand

Who: Sébastien Claudet, digital marketing manager/ fashion blogger.
Blog: Dandies.com
34th in the Ebuzzing fashion rankings
Interests: fashion, luxury, design.

What motivates you to blog?

I threw myself into this adventure both for the business opportunities I saw developing and just the desire to discuss men’s fashion.

Blogging offered me a chance to combine my two main passions: fashion and the web. As early as the end of the 90s, creating sites and forums really interested me. After creating and helping to write many blogs I decided to start my own. Dandies was born in November 2009.

How do you raise blog awareness?

It’s hard work. Search Engine Optimization takes up about 45% of the time needed to write an article between the syntax and the URL headings as well as the implementation of various META tags. As a current events blog concerning fashion, the brand content that I choose to include in the blog is, for the most part, a strategic positioning decision.

What is the value added by brands to the blog?

Credibility and status for sure! Currently, my blog gets about 3,000 hits per day and roughly 80,000 visitors per month. The blogger is an informed user and consumer with a certain amount of influence on the net. In time, we become specialists in the areas which we cover and we can guide brands through this digital maze.

Did the arrival of social media change your blog in any way?

In many ways, of course; especially integrating Facebook and Twitter - this substantially increased the amount of traffic. But it is also a buzz with a double edge for audiences. The advent of likes leads to less comments on Facebook, which creates less synergy on the blog.
What does the future hold for video platforms on the internet?

As a digital marketing professional, I think that we have to push blogger interaction to the maximum, get users more involved in the content that the brand to put in the forefront.

I do not think that simply adding a video is enough. The video should be introduced in the article and follow the blog’s subject matter.
V. Focus on Etam

One event impacted fashion media and blogs: the lingerie fashion show put on by Etam on **January 24, 2011**.

On this occasion, Etam astoundingly orchestrated the buzz surrounding the event and held it at a high level. The brand relied upon influential blogs and media to reach the widest possible audience.

The media impact was followed by an increase in publications mentioning the brand Etam in the days immediately preceding and following the fashion show, with a peak coming the day right after the show.

A. Breaking down the steps taken

On 18 January, 4 viral videos received more than **450,000 views on Youtube**. One of the videos was viewed more than 310,000 times and generated **147 opinions, 9 comments and 75 favorites**.

**Before: the videos’ strong impact**

The strategy used by Etam increased its overall media presence:

The sponsored article campaign allowed Etam to announce the fashion show and have the announcement reach a maximum number of internet users. It also created a discussion among the various communities that were to take part in the event. These influencers, who were specifically targeted, relayed the message via their preferred channels: Blog or media at first then Twitter, Facebook, video channel, etc…
The campaign also published a series of ads on its Facebook page: Etam was able to create a dialogue with its community of fans regarding the events associated with the fashion show through a competition that was aired on all of its media channels between January 3 and 16.
During: fashion show aired on several channels

The simultaneous presence of internal and external channels brought the show to a wide audience.

Indeed, the show was aired live on Etam’s official website as well as on several blogs that had links or a relationship with the brand that Ebuzzing was able to detect.

Etam created a hashtag (#) in order to give a play-by-play of the fashion show on its Twitter account. Many influencers and users were able to comment on the fashion show live.

After: Creating a wide spectrum buzz

Several videos were published on various themes: the entire show, best-of, making-of, behind the scenes, celebrity gossip and attendees such as Lou Doillon, Eva Herzigova, Kate Moss and even Julie Depardieu, as well as live performances by Joey Starr, Beth Ditto, The Kills and Boy George.

Videos were published by Etam on YouTube and Dailymotion, but other media and bloggers who were invited to attend the event also aired them (trendymood, meltyfashion…). They served as an indispensable intermediary in order to reach a wide and varied target audience. Their involvement in the campaign guaranteed a much larger amount of visibility than the brand would have been able to generate on its own. The brand was able to reach communities beyond its circle of fans and multiply the number of people who would receive the message.

Each content type targets a specific audience and is broadcast over a channel that is adequate for this target: fashion fans, music fans, stars fans, YouTube…
B. Critical assessment: The fashion show enabled Etam to extend its conversational arena

Publications that mention Etam by topic in January 2011

Before the fashion show, Etam appears in all of the traditional outlets for such a brand: fashion, sales events, its muse Natalia Vodianova. After the fashion show the lingerie, guests, music group The Kills as well as the models that took part in the show were mentioned at a much higher rate. Completely new channels began talking about Etam, discussing subject matter that fell outside its traditional core activities.

From January 1 to 18

From January 19 to 31

More than 220 000 views

More than 80,000 fans
C. The blog communities that published articles regarding Etam

In tandem with its desire to reach additional communities as well as those that touch upon up-to-the-minute breaking news, Etam was able to enlarge its targeted audience with success.

Indeed, if the primary communities are connected to the industry, either before or after the fashion show (fashion having been mentioned in 78% of discussions and 59% of sources referring to Etam), the number of communities indirectly associated with the brand multiplied after the fashion show.

As such, we have seen that an entirely different group of readers was brought into contact with the Etam brand, comprised mainly of bloggers that handle celebrities and cultural issues.

D. Results and conclusion:

Etam wanted to set up its fashion show in such a way that reached the widest possible audience. This targeted audience being fans of the brand to those vaguely interested in fashion. From the beginning, the plan to reach out to this wider audience included live musical performances by artists in different genres.

On the internet, the attempt to reach this audience was approached by a strong social media presence, orchestrated in such a way as to increase the “buzz” around the event and to sustain it thereafter. The Etam brand relied on the advantages available to it through the use of several different channels in order to reach this audience and to create a conversation surrounding the event. The brand blatantly used influencers in the various topics such as purepeople.com, IBuzzU, who are well-known for having large audiences in order to start the buzz and to submit information to complementary communities. Then, the message was able to circulate as it was reposted and used on other, lesser-known blogs and media platforms. The media platforms were more likely to spread the word through more conventional channels (press communiqués, etc…)

The substantial airing of teaser videos containing women in lingerie in Paris reinforced the success that Etam had through its publications. As of today, one of the three videos has been viewed over 300,000 times!
The strong interaction between the media used by Etam provided for a multi-channel style of communication. These communications were reinforced by the sheer multitude of sites that aired the operations and redirected them to different drop points: YouTube channel, Facebook page, official site, Twitter account…

Indeed, airing the live feed from the fashion show on its Facebook “fan page” that currently boasts more than 80,000 fans, on livetweet via Twitter and to more than 160 @etam_france subscribers.

Moreover, all the videos combined that aired on Etam’s YouTube channel were met with great success attaining over 1 million views for the 20 videos that were uploaded.

Objective obtained: create and sustain the buzz.

Before and after the fashion show, bloggers and online media outlets were brought into the fold concerning the campaign. Composed of “fashion” or “buzz” oriented sites, their collaboration was utilized at different levels:

- Ads about the show and Facebook competition
- Exclusive diffusion of buzz videos
- Invitations to the show
- Exclusive diffusion of fashion show videos

By diffusing the content on internal channels (Facebook, web site, YouTube/Dailymotion channels) as well as on external media (blogs and media outlets), the Etam brand was able to offer a rich and varied amount of content by diffusing such on different types of channels that covered a wide array of topics.

Note:

Etam had a similar project in 2010, via the airing of a video containing 4 powerful bloggers (nizzagirl, MarieluvPink, Deedee, Trendymood) which unveiled two competitions very similar to the one studied herein.

After this first successful foray, Etam optimized the structure in place in order to create even more buzz surrounding its fashion show.
VI. About Us

About Ebuzzing:

Led by experienced entrepreneurs, Ebuzzing is the global platform for Social Media Advertising, and Europe’s leading Social Media group. Ebuzzing assists brands in the development of their Social Media communications strategies. It also operates OverBlog, the number one blogging platform in Europe. The Ebuzzing group (formerly known as Wikio Group) has over 190 employees and has offices in London, Paris, Toulouse, Milan, Rome, Madrid, Hamburg, Dusseldorf, Basel, and Casablanca.

For more information, contact:

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www.ebuzzing.co.uk

About Ykone:

Ykone is a start-up created in 2008 by Olivier Billon and Mathieu Lebreton (ex-L’Oréal Luxe) both passionate about fashion and the internet community. Ykone publishes several online magazines that specialize in fashion and counts over 70 companies among its social media strategy clients. The Ykone team is made up of 15 employees, based in Paris.

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+33 1 44 76 05 74
www.ykone.com
Appendix: List of brands studied

<table>
<thead>
<tr>
<th>Ready-to-wear</th>
<th>Luxury</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Saints</td>
<td>Adolfo Dominguez</td>
</tr>
<tr>
<td>Bench</td>
<td>Armand Basi</td>
</tr>
<tr>
<td>Benetton</td>
<td>Armani</td>
</tr>
<tr>
<td>Bershka</td>
<td>Bulgari</td>
</tr>
<tr>
<td>Bruno Banani</td>
<td>Burberry</td>
</tr>
<tr>
<td>Camaieu</td>
<td>Calvin Klein</td>
</tr>
<tr>
<td>Carhartt</td>
<td>Cerruti</td>
</tr>
<tr>
<td>Custo Barcelona</td>
<td>Chanel</td>
</tr>
<tr>
<td>Debenhams</td>
<td>D&amp;G (Dolce &amp; Gabbana)</td>
</tr>
<tr>
<td>Desigual</td>
<td>Dior</td>
</tr>
<tr>
<td>Diesel</td>
<td>Enrico Coveri</td>
</tr>
<tr>
<td>Dorothy Perkins</td>
<td>Ferré Gianfranco</td>
</tr>
<tr>
<td>Etam</td>
<td>Givenchy</td>
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<tr>
<td>FCUK</td>
<td>Gucci</td>
</tr>
<tr>
<td>Fruiot of the Loom</td>
<td>Hogan</td>
</tr>
<tr>
<td>Gap</td>
<td>Jil Sander</td>
</tr>
<tr>
<td>Gerry Weber</td>
<td>John Galliano</td>
</tr>
<tr>
<td>H&amp;M</td>
<td>Joop</td>
</tr>
<tr>
<td>Helly Hansen</td>
<td>Karl Lagerfeld</td>
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<tr>
<td>Joma Sport</td>
<td>Krizia</td>
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<tr>
<td>Jules</td>
<td>Lacoste</td>
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<tr>
<td>Kiabi</td>
<td>Laura Biagiotti</td>
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<tr>
<td>Kookai</td>
<td>Louis Vuitton</td>
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<td>Loewe</td>
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<td>La Senza</td>
<td>Marc Jacobs</td>
</tr>
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<td>Levi's</td>
<td>Massimo Dutti</td>
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<td>Max Mara</td>
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<tr>
<td>Mango</td>
<td>Mirtso</td>
</tr>
<tr>
<td>Marc O’Polo</td>
<td>Paul Smith</td>
</tr>
<tr>
<td>Marks &amp; Spencer</td>
<td>Pierre Cardin</td>
</tr>
</tbody>
</table>