



SS21 Fashion Week by the Numbers

A data deep dive into this season's performance
and a comparison of digital vs. physical formats

LAUNCHMETRICS

In trying times, comes creativity — and Fashion Weeks across the globe showed their creative business prowess as participating brands reset and restructured their event campaigns in order to combat the current situation. Whether presenting in physical, digital or 'phygital' formats, successful brands presented their collections in hand with 360 degree marketing campaigns that leveraged traditionally popular Voices in a fresh way. In this data snapshot, we explore the top brands and Voices across the four main global fashion weeks for SS21: New York, London, Milan and Paris.

PHYSICAL SHOWS AREN'T DISAPPEARING

Jason Wu ranked first this season in Media Impact Value™ (\$3.6M), having **more than doubled the MIV® of his Feb. show (\$1.2M)**, thanks to the special nature of this season's digital event.

NYFW demonstrated that brands are learning to adjust to create 360° campaigns while thinking more “phy-gitally”. This was evident in the coverage driven by influencers and celebrities. **\$9M** (approximately 2K placements) was generated by the Influencer and Celebrity Voices. During the most recent digital Fashion Week, at last season's Milan FW Men's, the Influencer and Celebrity Voices saw only **\$1M in MIV®** (approximately 300 placements) combined.

Specifically, models become key value-drivers. **Coco Rocha**, pregnant, walked the runway in the **Christian Siriano** show; her 14 posts about the experience garnered **\$280K in MIV®** for the brand.

Top Brand

\$3.6M

Jason Wu

Influencers & Celebrities

\$9M

Total MIV®

Top Voice

Media

70%

Share of Voice

London Fashion Week

Overview

SS21 Data Snapshot

INSTAGRAM WAS THE TOP DRIVER FOR BRANDS

The **number one channel**, in terms of **Media Impact Value™**, was Instagram — overtaking online media, which had been the strongest platform for LFW in previous seasons. In fact, brands overall showed a **57% increase** in their Instagram Owned Media posts which led to an increase of 131% in the total MIV® of Owned Media.

Brand Spotlight: Victoria Beckham

Victoria Beckham **generated the highest MIV® at LFW, worth \$9.6M by opting for a “hybrid” model**, featuring both a physical event with a select guest list, and a digital screening. Victoria Beckham masters the art of leveraging the Partner Voice. Once again **she teamed up with Tiffany & Co. to generate an extra \$105K in MIV®**



Brand Spotlight: Burberry

Burberry did a great job at maintaining their Media Impact Value™ (\$7.6M for SS21) as compared to last season, having only seen a 3% decrease. Burberry's MIV® grew mainly thanks to the British Fashion Council's instagram posts. **The BFC leveraged the power of social media to support brands that were showing.**

INFLUENCERS PROVED VALUABLE FOR MFW

Even though influencers saw a decrease in numbers, they still generated some of the highest MIV[®] placements. **Chiara Ferragni**, who didn't attend events this year, shared one of her favorite looks from Fendi and [earned \\$461K](#) in MIV[®].

Another way to increase the Influencer Voice is by casting buzz-worthy models; model-influencer Taylor Hill's post, walking for Etro, [generated \\$436K](#) and Irina Shayk's 6 posts during MFW, earned a total of \$916K.

Fendi **ranked first with a total of \$13M in MIV[®], an increase of 58% vs. last season.** Fendi's major boost in MIV[®] came from their Owned Media and Influencer strategies. **Versace** was also praised **for their use of plus size models, which were featured for the first time ever at MFW.**

Top Post

\$461K

Chiara Ferragni

Top Brand

\$13M

Fendi

Paris Fashion Week

Overview

SS21 Data Snapshot

TOP BRANDS EXPERIENCED GROWTH IN THEIR MIV®

The last stop was Paris and with big brands confirmed on the agenda everyone was eager to see how they'd fare. And, while the overall MIV® decreased from the previous FW, all top 3 brands experienced an increase in their MIV®: **Dior by 25%**, Louis Vuitton nearly doubled their performance, and **Chanel by 60%**. Celebrities had the most influence in Paris, which generated over **\$6M in MIV®**.

Brand Spotlight: Dior

Dior ranked the highest, with **their overall MIV® increasing by 25%**. **Influencer MIV® increased by 40%** while **their placements decreased by 25%**. Dior focused on "quality" vs. "quantity" and leveraged All-Star influencers such as [Karen Wazen](#) and [Valentina Ferragni](#).



Brand Spotlight: Miu Miu

Miu Miu experienced a dramatic **increase in MIV® compared to FW20, which grew by 125%**. **Owned Media** was a major contributor, having **increased its Share of Voice by over 120%**. **Influencers and Celebrities** also saw a renewed focus. Actress Gabrielle Union, who didn't attend in-person, was their highest placement with her 2 posts generating \$445K.



The trends emerging this season

SS21 Data Snapshot

“Hybrid” events should be incorporated into the new normal. Brands who chose a “phygital” campaign, fared much better than those who privileged a purely physical or digital event (See Jason Wu, Miu Miu, Fendi and Dior).

Owned Media is a force to be reckoned with and has moved to the forefront of many brands. By focusing social media campaigns on channels that generate the most impact, while increasing the post rate significantly, brands have seen an uptick in their Media Impact Value™.

Influencers can be activated without being present. Some of the top posts from the season came from influencers who did not attend in-person but yet contributed notably to the overall MIV® while reminding their followers to tune in.

Much like in years past, and before Influencers joined the ranks, **models are a key source for generating media impact.** It's key to consider your casting as well as secure social media support from them during your event in order to increase your MIV®.

Now is a time to seek out mutually beneficial partnerships and create strong campaigns which will speak to the target audience. Brands who were able to maintain their MIV®, did so in part by leaning on their official partners.

Media is, and will always be an ally. It's important to create specific and targeted content which will amplify your message across different outlets.

While for some brands MIV® didn't decrease, it did remind others to be more efficient. Those who were successful **garnered 6x more MIV® per attendee.**

Methodology

Period: New York Fashion Week (September 11th to the 19th 2020); London Fashion Week (September 15th to the 25th 2020); Milan Fashion Week (September 20th to the 30th 2020); Paris Fashion Week (September 26th to October 8th 2020).

Scope: Online and social posts and articles

- **Media Impact Value™ (MIV®):** Launchmetrics' proprietary Machine Learning algorithm provides brands with a unified currency to measure the value of all marketing activities across Voices, Channels, and Markets by assigning a monetary amount to every post, interaction, and article. Finely tuned to specificities of fashion, luxury, and beauty, the algorithm was trained on actual media rates and 5+ years of FLB specific campaign data. It analyzes more than 100 quantitative and qualitative attributes including audience engagement, industry relevance, source authority, and content quality, to create a highly accurate method of measurement. MIV® offers a unified way to calculate how brand equity is being created and which strategies create the most ROI.
- **Placements:** Number of posts, interactions or articles related to search query (i.e. brand, product or event).
- **Voices:** Launchmetrics' Voice-Centric approach highlights the Voices creating value today to provide a holistic view of marketing performance and cross-compare the impact various activities have on the customer lifecycle. From Media, Celebrities, Influencers, Partners and Owned Media, this methodology gives brands a unique framework to understand the ROI of these activities as well as the Voices that influence the customer buying journey from awareness and consideration to conversion and retention.
- **Share of Value:** The percentage of Media Impact Value™ generated by a brand, a segment, or an influencer, during a specific time period (ex: monthly) or an event (ex: Fashion Week, BeautyCon or Baselworld). Share of Value can be used to identify the most talked about brand during an event or benchmark your marketing & communications strategies against competitors.
- **Share of Voice:** The percentage of mentions generated by a brand, segment or influencer during a specific time period (ex: monthly) or an event (ex: Fashion Week, BeautyCon or Baselworld). Share of Voice can be used to identify the most talked about brand during an event or to benchmark your marketing & communications strategies against your competitors.
- **Influencer Mix:** The percentage of coverage or Media Impact Value™ generated by a specific influencer tier:
 - Micro Influencers: <100K followers
 - Mid-Tier Influencers: 100K-500K followers
 - Mega Influencers: 500K-2M followers
 - All-Star Influencers: More than 2M followers

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