



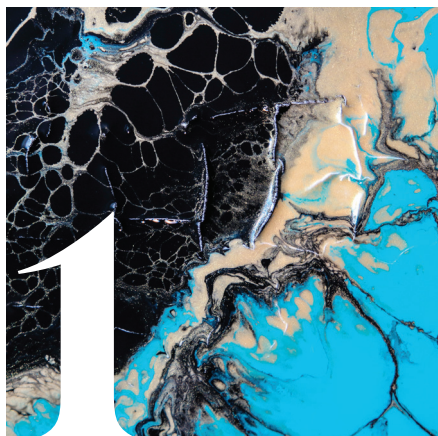
NOVEMBER 2018

The State of British Luxury Influence

WALPOLE



Contents



The State of British Luxury Influence:
INTRODUCTION AND
EXECUTIVE SUMMARY



A Powerful Landscape:
HOW THE LUXURY MARKET IS
REPRESENTED BY INFLUENCERS



Luxury Fashion:
BUILDING A POWERFUL
PRESTIGE BRAND



Wearisma's Ones to Watch:
KEY INFLUENCER PERSONAS
FOR 2019



Behind Walpole's Members:
A VALUABLE EXPOSÉ OF THE MOST
LUXURIOUS BRANDS



The State of British Luxury Influence:
CONCLUSION



Introduction

Wearisma and Walpole have partnered to produce the first in-depth study on the state of British Luxury Influencer marketing.

Our joint research will walk you through unique insights into the world of luxury influencers, successful brand strategies and not-to-be-missed influencer profiles to watch out for in 2019.

The first of a new quarterly report series, we will set the benchmarks for the evolution of British Luxury Influence, show trackable progress over time and identify the key metrics that define success for leading luxury brands in influencer marketing.

Executive Summary

In a complex age where consumers are both reliant on influencers for brand recommendations and are growing sceptical of influencer-brand partnerships, how can the luxury industry foster more authentic and profitable Influencer Marketing strategies?

Luxury brands are performing better than most other industries in influencer marketing. In 2017, luxury brands saw more consumer engagement across all platforms, despite fewer posts. By placing their brands on accessible platforms and partnering with authentic influencers, the industry is evolving the traditional meaning of 'exclusive' and 'aspirational' into something new.

Combining in-depth analysis with intelligent data, our report reveals trends within the luxury sector. Key findings and recommendations include:

- UK influencers generate more engagement when speaking about British luxury brands; so what is it that gives them the edge?
 - Gucci, Chanel & Dior are the most mentioned Luxury Fashion Brands by UK influencers - we take a closer look at why, and who is following close behind
 - As well as using Industry Insiders, Wearisma recommends thinking outside the box with Artists, Sustainable Champions and Baby Boomers as key influencer personas to work with in 2019
 - Wearisma's exclusive on Walpole member brands reveals that Charlotte Tilbury and Burberry both bring unique influencer strategies to top the "Wal" of fame" Walpole member league tables
 - We show what different luxury sectors can learn from each other. Our results reveal Retailers & Fashion Houses topping the charts in terms of number of influencers and mentions, whilst Interior Design Brands appear to harness above-average engagement
- Luxury influencers are more effective than Fast Fashion influencers - not only at generating engagement, but also for media value within the UK and in other key luxury markets such as the US and Japan



2



A Powerful Landscape:
HOW THE LUXURY
MARKET IS
REPRESENTED BY
INFLUENCERS

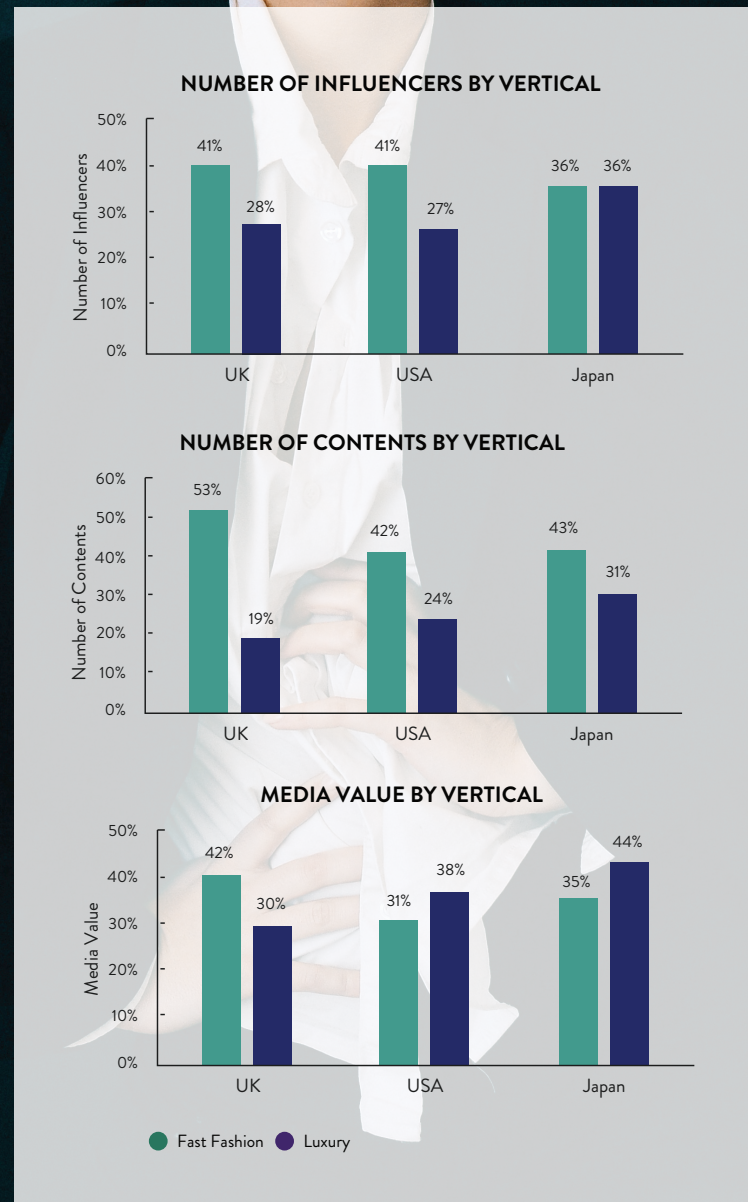
LUXURY INFLUENCERS ARE MORE EFFECTIVE THAN FAST FASHION INFLUENCERS

Fast Fashion brands have the largest number of influencers talking about them. Within the UK and USA, influencers are mentioning luxury brands 13% and 14% less than they are Fast Fashion brands respectively. Fast Fashion brands' accessibility and affordability no doubt has a huge part to play in this. However, looking at the number of influencers as an indicator of strength in brand buzz alone, while tempting, only demonstrates part of the story.

Specifically, luxury brands, compared to Fast Fashion brands, produce higher levels of engagement and media value on a per influencer basis within the UK, USA and most prominently, in Japan. This contrast suggests that influencers' coverage of luxury brands, on average, delight their audience more than that of the Fast Fashion brands.

In this era, where consumers demand relatability and authenticity from brands, Influencer Marketing enables brands to tap into new levels of trust and accessibility without losing its appeal to new generations of digital consumers.

Source: Wearisma Data
Timeline: June to September 2018





HOW DO UK-BASED INFLUENCERS COVER LUXURY BRANDS?

A recent study by Toluna & Golin revealed that one in five British consumers enjoyed receiving product recommendations from social media influencers. However, there is little research into how these influencers are impacting the UK luxury market specifically. Below, we will explore the relationship between UK luxury influencers and UK luxury brands.

While fewer UK-based influencers promote British luxury brands compared to international brands, those who do generate more engagement on average

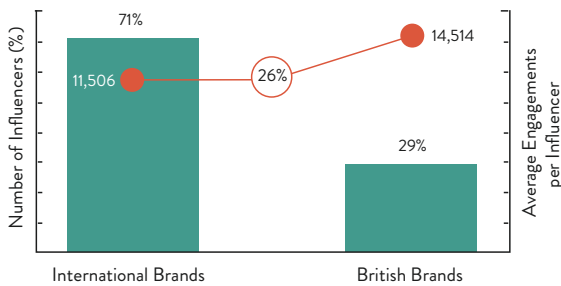
29% of the influencers who mention luxury brands in the UK speak about British luxury brands whilst 71% speak about International luxury brands. In addition, international luxury brands receive 54% more coverage compared to British luxury brands - such disparity is somewhat expected when comparing the size of international and British luxury brands. However, a closer look shows British luxury brands appeal and delight UK influencers' audience more.

Within luxury, the content produced for British brands by UK influencers is not only creating more engagements per influencer, but it also has a higher media value per influencer.

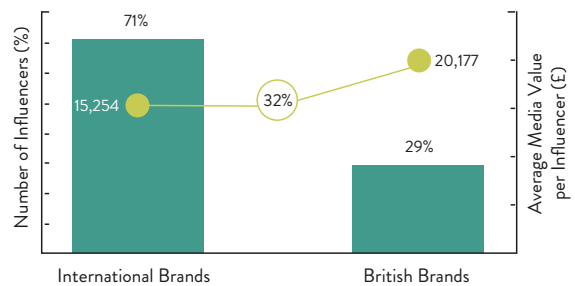
What makes British brands so appealing to UK-based influencers' audience in the first place?

Perhaps it is to do with the increasing trustworthiness and perceived authenticity of British brands. Not only have the British public become 'more conscientious than ever' about buying British products, international fashion powerhouse Chanel has chosen London as its new destination of their HQ. Editor-In-Chief of Harpers' Bazaar, Justine Picardie, noted that this move can not only be seen as a "mark of confidence in the UK's long-term prospects" but also as a desire to be closer to one of the world's fastest growing luxury consumer bases. It also appears that our American cousins share in this affinity as Walpole's own research found that 73% of American customers are more favourable to British products than they were three years ago!

NUMBER OF INFLUENCERS SHOWING AVERAGE ENGAGEMENTS PER INFLUENCER



NUMBER OF INFLUENCERS SHOWING AVERAGE MEDIA VALUE PER INFLUENCER



● Number of Influencers ● Average Media Value per Influencer ● Average Engagements per Influencer

Source: Wearisma Data
Country: UK
Timeline: May to October 2018





British luxury brands, whilst not always comparable in size and scale to their French and Italian counterparts, punch considerably above their weight in terms of creating meaningful and authentic engagement with their customers. We see more and more British luxury brands turning to social media, particularly Instagram, as a core part of their digital marketing activities and leading the way with the use of innovative and creative campaign strategies often utilising influencers that get them noticed on a global scale.

Walpole



3



Luxury Fashion: BUILDING A POWERFUL PRESTIGE BRAND




To obtain a clear picture of the Luxury sector's success in adopting Influencer Marketing, it is important to understand successful influencer strategy at a brand level. Our data has highlighted some of the luxury fashion giants who have spearheaded cutting edge influencer strategies.

Source: Wearisma Data
Country: UK
Timeline: Q2 - Q3 2018



WEARISMA'S INFLUENCE INDEX: Top Mentioned Luxury Fashion Brands in Q2 - Q3 2018

RANK

1	GUCCI	Gucci
2	 CHANEL	Chanel
3	Dior	Dior
4	SAINT LAURENT	Saint Laurent
5	 LOUIS VUITTON	Louis Vuitton
6	Chloé	Chloe
7	BALENCIAGA	Balenciaga
8	PRADA	Prada
9	DOLCE & GABBANA	Dolce & Gabbana
10	FENDI ROMA	Fendi
11	BURBERRY	Burberry
12	VALENTINO	Valentino
13		Christian Louboutin
14	JIMMY CHOO	Jimmy Choo
15	MIU MIU	Miu Miu

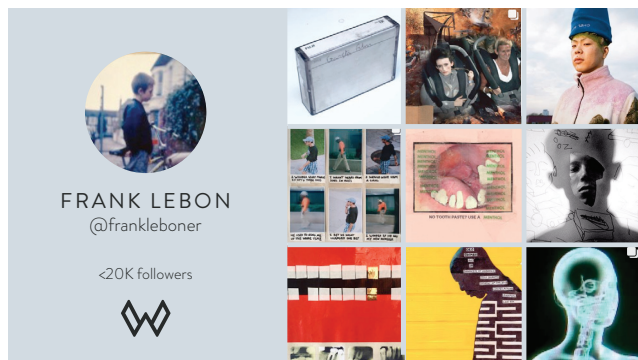


No. 1: GUCCI

Our rankings suggest that Gucci has reclaimed its position as hottest brand from Balenciaga. The Italian powerhouse tops all of our lists for luxury brands both in volume metrics (such as the number of influencers and mentions) and value metrics (such as engagement and media value). Here are two key reasons why Gucci has taken this top spot.

a) Staying relevant with Micro Influencers

While Gucci has continued to invest in its relationship with celebrity clientele, their success can be attributed to their focus on working with a host of niche talent such as filmmaker Frank Lebon ([@frankleboner](#)).



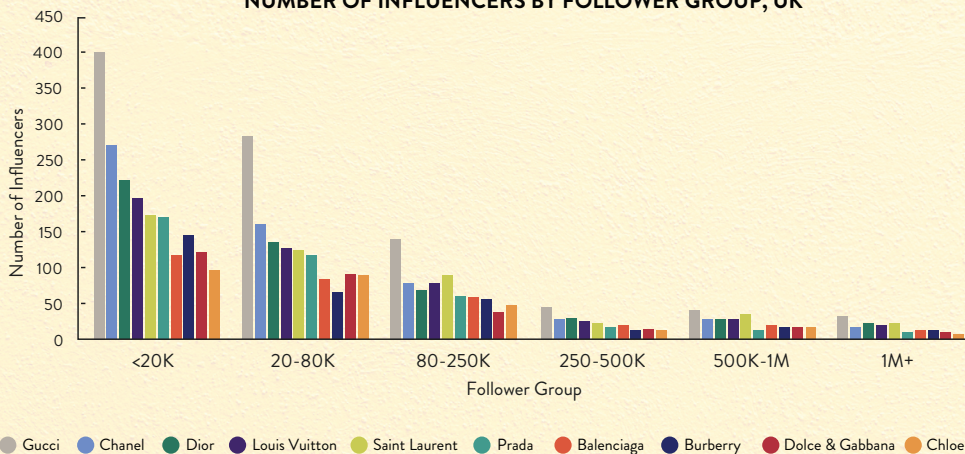
Our data shows that Gucci achieved the highest number of influencers in the <20K follower group. This is primarily due to their conscious recognition of the force of micro-influencers. In doing so, they have been able to amass more organic content which is becoming increasingly attractive to consumers who are beginning to crave authenticity from brand-influencer partnerships.

b) Product offerings

Another factor of Gucci's success is their diversification of product offerings. Focusing on entry-level products such as small-leather goods and eyewear (content which the brand themselves defines as 'Traffic Building') has created an influx of aspirational consumers who join the Gucci family at the more affordable end and then, through loyalty, save up for the higher-value products.



NUMBER OF INFLUENCERS BY FOLLOWER GROUP, UK



Source: Wearisma Data
Country: UK
Timeline: May to October 2018





No. 2: CHANEL

Out of the top ten brands, Chanel has the largest Instagram following - counting 30.9m followers as of November 2018. Their popularity indeed is reflected in our volume metrics, which position them as having the second highest number of influencers and coverage as well.

When working with influencers, Chanel appeared to take a more direct approach and actively encouraged the creation of organic content. This year's launch of the We Love Coco (@welovecoco) page showcases purely consumer created content for the brand's beauty sector, highlighting an emphasis on community building.

Like Gucci, Chanel has not allowed itself to be enticed purely by follower count. When speaking about their strategy Chanel stated that they "encourage medium and long-term collaborations with local influencers who like the brand, identify with it and represent its values". Clearly, putting authenticity over following pays off.



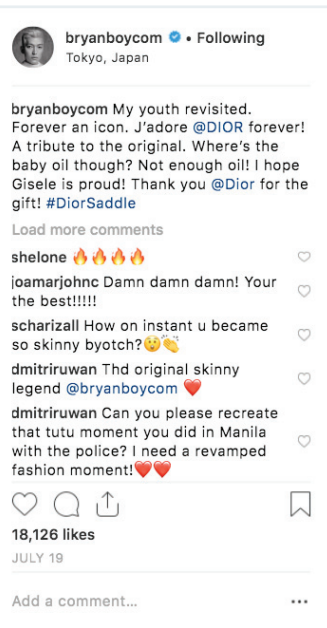
No. 3: DIOR

LVMH brand Dior launched its first endeavour into Micro-Influencer Marketing last year. They worked with the likes of Beatrice Gutu (@beatrice.gutu) and Shini Park (@parkncube) for their #DiorLoveChain campaign centred around the amorous question: ‘What would you do for love?’.




Dior's Head of Earned Media Akash Mehta has stated that allowing micro-influencers to utilise their creativity and have “control during their content creation” is a key element to this strategy. LVMH's report of the brand's ‘excellent performance’ in 2017 adds some merit to this method.

Unlike Gucci and Chanel, Dior also played on the opposite end of the field by working with 100 mega-influencers to delight everyone's Instagram feed this summer. Insta-veterans Brayn Boy (@byranboycom) and Eva Chen (@evachen212) were among those called to promote the relaunch of the #DiorSaddle. Our analysis, which identifies Dior as being in the top five for both media mentions and media value, suggests that brands do not have to pick between a mega or micro influencer strategy - a mixture of both can also prove fruitful.



4



**Wearisma's
Ones to Watch:
KEY INFLUENCER
PERSONAS
FOR 2019**

Now that we've examined the top three brands favoured by influencers and those who were delighted by the influencers' audience, how can you take advantage of finding luxury influencers who put authenticity first? What can you do to move beyond the oversimplified classification of 'mega' versus 'micro' influencers?

Here at Wearisma, we've identified 4 Key Influencer Personas you should be working with in 2019.




Profile 1: 'THE INDUSTRY INSIDERS'

When considering influencers to partner with, the data suggests that marketers will benefit from working with Industry Insiders - individuals that hold professional positions within various industries such as Fashion, Media and Design.


Within the UK for example, the individuals producing the highest amount of content for Ray Ban within the last 6 months are Visual Merchandiser Bradley Harper (@bradders_21) and former Fashion and Retail Manager Emma Hill (@emmahill) the latter of whom had the highest valued media content (£1.2 million) featuring Ray Ban.






EMMA HILL
@emmahill

250-500K followers







BRADLEY HARPER
@bradders_21

<20K followers





As the definition of 'influence' changes, consumers are becoming less enamored with numbers and more so with the authority of Industry Insiders who can provide expert and trustworthy opinions.

Brands do not have to go far when looking for Industry Insiders to collaborate with - and should even be encouraged to work in-house. For example, fashion designer Alice Temperley (@alicetemperley) and interior writer and stylist Cate St. Hill (@catesthill) produced the highest number of media mentions within luxury fashion and luxury interiors respectively. Similarly, Saint Laurent, who came second to Gucci for highest level of engagement, consistently tag creative director Anthony Vaccarello (@anthonyvaccarello) in their social media posts.

To produce engaging content, brands should also consider turning influencers into Industry Insiders like E-tailer ASOS did with former blogger turned stylist Megan Ellaby (@meganellaby).





Profile 2: THE MODERN ARTISTS

Studies have shown that luxury brands who embrace art achieve higher levels of brand equity. Whereas previously, luxury brands and artists collaborated in traditional brick and mortar settings like galleries, recently this collaboration has moved into the digital realm. Top performer Gucci can attribute some of its success to its #TFWGucci campaign which displayed their wristwatches in several media styles all in the form of memes.

Gucci prioritised substance over notoriety and worked with niche artists like photographer Benjamin Langford (@blangblang92), meme artist William Ndatila (@williamcult) and illustrator Rozalina Burkova (@thedrawingdoor) among others. The result is a host of modern, authentic and subsequently engaging content.

Utilising a similar approach, Burberry, the most mentioned Walpole Member brand in the fashion & accessories segment, has also seen success. For the brand's 'The Art of Interpretation' film featured on IGTV, Burberry invited six artists including graffiti artist Good Child (@_goodchild) and graphic designer Sam Coldy (@samcoldy) to 'execute the graphic pattern of the new Thomas Burberry Monogram in their own unique style'.

As artists such as Dee (@illustrated.dee) and Benjamin Murphy (@benjaminmurphy_) sit among the top influencers for media mentions, it appears that brands would be wise to utilise artists in their influencer strategy. Art inspired content can prove to be exciting to luxury brand patrons who are often also patrons of the arts.

BENJAMIN LANGFORD
@blangblang92

<20K followers

DEE
@illustrated.dee

20-80K followers

WILLIAM NDATILA
@williamcult

20-80K followers

BENJAMIN MURPHY
@benjaminmurphy_

<20 followers





Profile 3: THE SUSTAINABLE CHAMPIONS

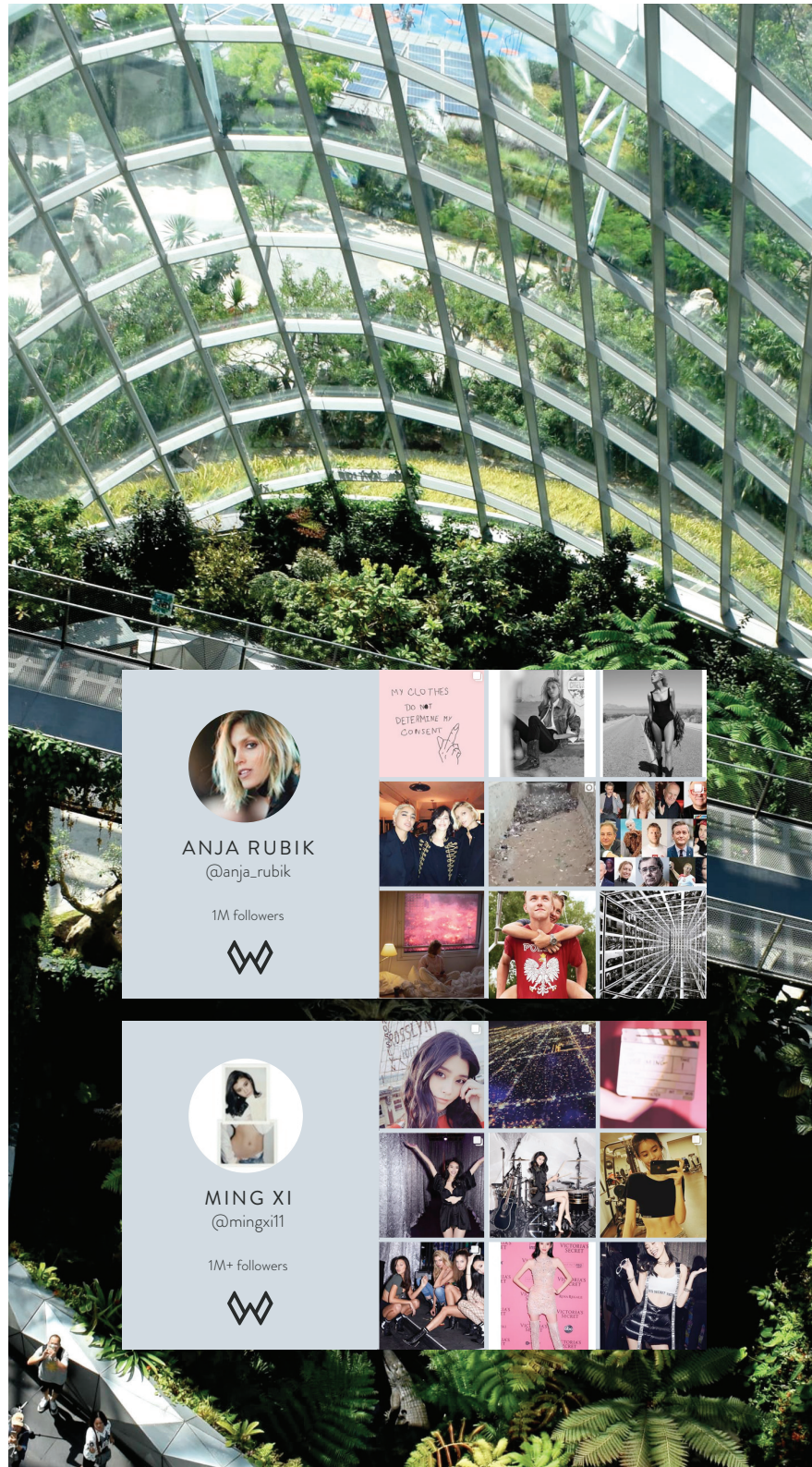
As the Fast Fashion industry faces scrutiny for their production processes, Luxury brands will benefit greatly from working with influencers who champion sustainability and green initiatives. Luxury brands that have adopted such initiatives include Porter Magazine. Powered by Net-A-Porter, the magazine dedicated its Summer escape issue to its partnership with Parley for the Oceans which aims to reduce plastic consumption.

Similarly, Stella McCartney, who recently was ranked first in empathy, generosity, and kindness by the New York-based Luxury Institute's Emotionally Intelligent Brand Index utilises the hashtags #GreenIsTheNewBlack and #MakeFashionCircular to promote their various sustainable initiatives.

In her documentary on the environmental impact of the clothing industry, reporter Stacey Dooley interviewed Niomi Smart (@niomismart) and Susanna Lau (@susiebubble) to suggest that brands use influencers to promote sustainable messages.

Celebrity model, mega-influencer and 'environmental game changer' Anja Rubik (@anja_rubik) was tapped as guest editor for Porter's Summer Escape issue and international top-model Ming Xi (@mingxi11) who 'shares McCartney's love of the planet' was chosen as the face for the brand's new sustainable collection for Adidas.

When promoting a global issue like sustainability, luxury brands should follow the likes of Porter and Stella McCartney and utilise influencers with an equally global reach. Moreover, to be truly 'green' there has to be transparency across all levels and this includes influencer selection. Carefully selecting influencers like Rubik and Xi who have a wide reach and a proven track record of 'walking the walk' when it comes to sustainability is necessary to maintain authenticity.





Profile 4: THE BABY BOOMERS

Typically, the main targets of brands engaging in Influencer Marketing has been both Millennials and Gen Zers. However, in doing so luxury brands may be missing out on an opportunity to create content featuring higher-valued products.

The data shows that three out of the top five influencers producing the most content within the luxury fashion & accessories sector belong to the Baby Boomer Generation. Unlike Millennials, Baby Boomer influencers like 63 year old David Evans (@greyfoxblog) have the spending power (which Forbes estimates as reaching \$15 trillion worldwide by the end of 2019) to afford both entry level and high-value luxury products. These findings, coupled with reports, reveal that Baby Boomers are more likely to 'move on to brands where they feel included and part of the dialogue' suggesting that this is one segment that should not be ignored.

Brands should follow the leadership of Vivienne Westwood (@viviennewestwood) who champions for increased visibility of mature individuals within the luxury market. The 77 year old designer herself features heavily in the brand's social media content.



5

WALPOLE



**Behind Walpole's
Members:**
A VALUABLE EXPOSÉ
OF THE MOST
LUXURIOUS BRANDS



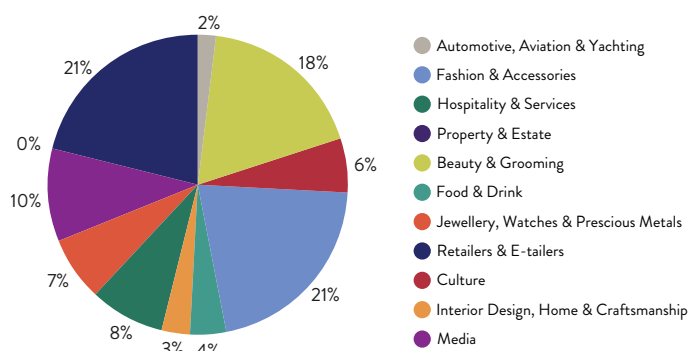


Walpole Members in the Retailers & E-tailers and Fashion & Accessories categories have the most influencers speaking about them



Source: Wearisma Data
Country: UK
Timeline: May to October 2018

SHARE OF VOICE BY NUMBER OF INFLUENCERS



Retailers & E-tailers

Within the Luxury Retailers & E-tailers sector, the influencers generating the most content are those who focus on lifestyle such as Claire Chanelle (@iamchouquette) and Clerkenwell Boy (@clerkenwellboyec). This suggests that, in line with their vast array of product offerings, retailers and e-tailers should focus on influencers who create an equally broad range of content, where they're able to mention products across all categories.

Net-A-Porter and Selfridges are leading the pack as progressive E-tailers. With the launch of Porter Digital earlier this year, Net-A-Porter's enhanced digital presence could explain this success. The brand is actively responding to consumer demand as [a study by Statista](#) found that by 2021, the majority (72.9%) of all retail e-commerce is expected to be generated via mobile devices.



Unsurprisingly, Fashion & Accessories brands are proving to be equally popular with UK influencers

Burberry is one of the top performing brands within this sector. Burberry's ability to blur the line between social media and e-commerce may be a contributing factor to their success. Under the helm of new creative director Riccardo Tisci, Burberry switched up its brand release strategy and launched products from its 'B Series' via its Instagram and WeChat Accounts. The scarcity of the products only being available for 24 hours at a time, coupled with the consistency of a new drop on the 17th of every month are two key ingredients for the production of [scientifically persuasive](#) content.



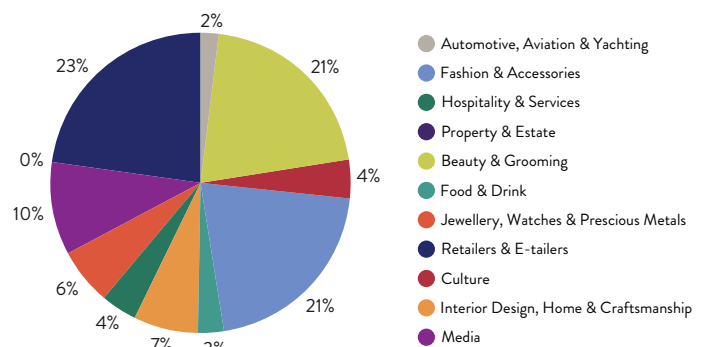


Beauty & Grooming Walpole Members drive brand awareness through frequent influencer mentions

Alongside Retailers & E-tailers and Fashion & Accessories, the Beauty & Grooming sector has one of the highest amount (21%) of media mentions across all sectors. These results appear to support recent findings by Econsultancy that beauty brands have been focusing on building brand awareness within their Influencer Marketing strategy.

Among many things, building brand awareness involves providing consumers with a better understanding of your brand. For example, Jo Malone, which received the second highest number of media mentions, have recently focused on producing more educational content, referencing the 'Jo Malone London School' featuring scented education classes via Instagram stories.

SHARE OF VOICE BY NUMBER OF MENTIONS



Source: Wearisma Data
 Country: UK
 Timeline: May to October 2018

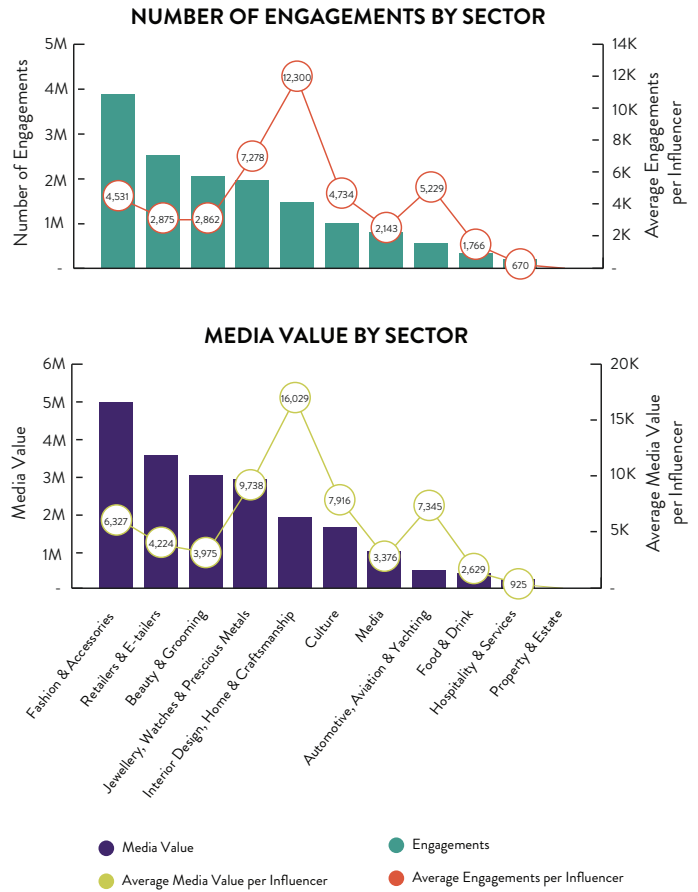




Interior Design, Home & Craftsmanship Walpole Member brands drive exceptionally high engagements and media value per influencer


Our Data shows that influencers covering the Interior Design, Home & Craftsmanship sector generate the highest average engagement and media value per post compared to any other verticals. A [survey](#) by The Resident, which found that social media has fueled a desire for people to make their homes more 'insta-worthy', suggests that the quest for the perfect backdrop, both on and offline, is fuelling engagement within this sector.

Amongst the top influencers for generating engagement within the interior design sector are author and podcast hosts Pandora Sykes (@pandorasykes) and Lily Pebbles (@lilypebbles).




Source: Wearisma Data
Country: UK
Timeline: May to October 2018


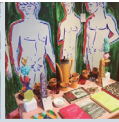

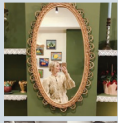
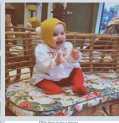
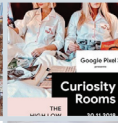


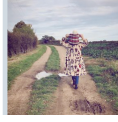





PANDORA SYKES
@pandorasykes

250-500K followers




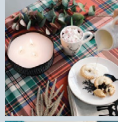


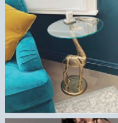

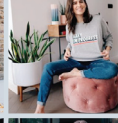

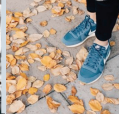













LILY PEBBLES
@lilypebbles

250-500K followers





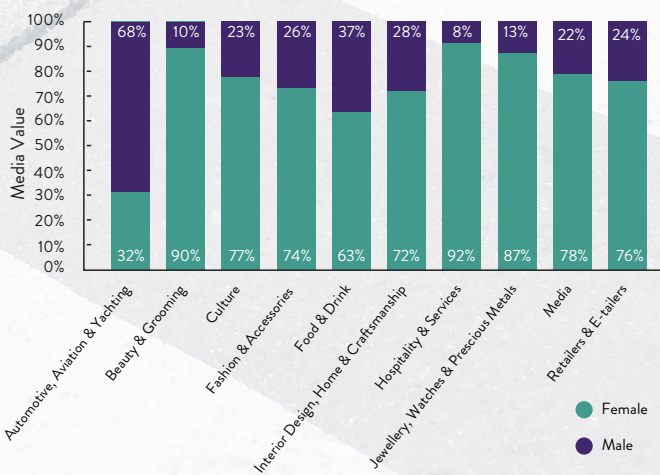


Male Influencers are the secret to Media Value in Automotive, Aviation & Yachting

Automotive Aviation & Yachting is amongst the top five sectors for media value, producing on average £7,345 per influencer - £3,122 more on average than influencers within Retailers & E-tailers sector. This means that typically influencers covering this sector are larger in size and in engagement. On the consumer side, products within this sector are big ticket items that usually require in-depth research before consideration and purchase. It is therefore understandable why car enthusiast Tim Burton (@Shmee150) is among the top influencers for media value as, within this sector, expert opinion and specialist knowledge is equally as important as purely aesthetics driven content.



MEDIA VALUE BY GENDER BY VERTICAL



Like Tim, influencers within this sector are overwhelmingly male and makeup 68% of influencers. In fact, six out of the ten top influencers for Media Value in Automotive & Aviation are men, with the top influencer being Oli White (@oliwhitety). Despite findings consistently showing influencer marketing to be a female-led initiative, these results suggest that brands in this sector should foster more relationships with male influencers.

Source: Wearisma Data
Country: UK
Timeline: May to October 2018





“WAL’ OF FAME”:
Top 10 Brands ranked by number of mentions
by influencer in Q2 - Q3 2018

RANK	BRAND	VERTICAL
1	Charlotte Tilbury	
2	Net-a-Porter	
3	Selfridges	
4	Jo Malone	
5	Burberry	
6	Farrow & Ball	
7	Alexander McQueen	
8	Mulberry	
9	Mr. Porter	
10	Elle	

Source: Wearisma Data
Country: UK
Timeline: Q2 - Q3 2018





CHARLOTTE
TILBURY &
BURBERRY
BOTH BRING
UNIQUE
STRATEGIES
TO TOP THE
“WAL OF
FAME”

Source: Wearisma Data
Country: UK
Timeline: Q2 - Q3 2018



“WAL’ OF FAME”:
Top 10 Brands ranked by engagements achieved
with Influencers in Q2 - Q3 2018

RANK	BRAND	VERTICAL
1	Burberry	
2	Charlotte Tilbury	
3	Tiffany & Co	
4	Selfridges	
5	Alexander McQueen	
6	Net-a-Porter	
7	Jo Malone	
8	Claridge’s	
9	Manolo Blahnik	
10	Mr. Porter	



Top performer: BURBERRY

Burberry is the top performing Walpole Member brand for engagements and media value. Being one of the first fashion brands to incorporate technological initiatives has allowed Burberry to develop a keen insight into the digital makeup of their consumer base which, one can argue, is the main reason they're successful in producing highly engaging content. Some of these initiatives include:

1. Being the first to use Snapchat's Snapcode feature.
2. Being the first brand with its own Apple Music channel.
3. Giving customers the chance to make versions of TV ads starring themselves.
4. Using Facebook chatbots.



Source: Burberry

Top performer: CHARLOTTE TILBURY

Charlotte Tilbury was ranked the highest among UK luxury brands for number of mentions by Influencers. The beauty giant also achieved the second highest level of engagement with influencers which is down to them placing Influencer Marketing at the forefront. They also view all consumers as influencers too, engaging them within their advocacy campaigns, which has served to increase the production of high-value organic content. The success of the proclaimed Taylor Swift of Beauty can also be attributed to the fact that Charlotte Tilbury herself utilises the brand's social media platform as her own, creating an element of personality. By giving consumers a direct line to the brand founder - who also happens to be an Industry Insider - serves to build consumer trust.



Source: Charlotte Tilbury





Conclusion

THE LANDSCAPE OF LUXURY INFLUENCERS REMAINS FULL OF POTENTIAL.

Luxury offers more engagements per influencer than Fast Fashion and a diverse market of influencer personas capable of reaching a wide audience. It is no wonder then, that powerhouses such as Gucci and Chanel are galvanising their marketing efforts through influencer partnerships. Implementing Influencer Marketing strategies such as; focusing on niche content creators, community building and diversification of product offerings, has led to an increase in organic content and engagement for luxury brands. Ultimately, influencers are bringing a new dimension to the realm of luxury marketing, and this trend will only continue to expand luxury's 'influence' in the future.





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