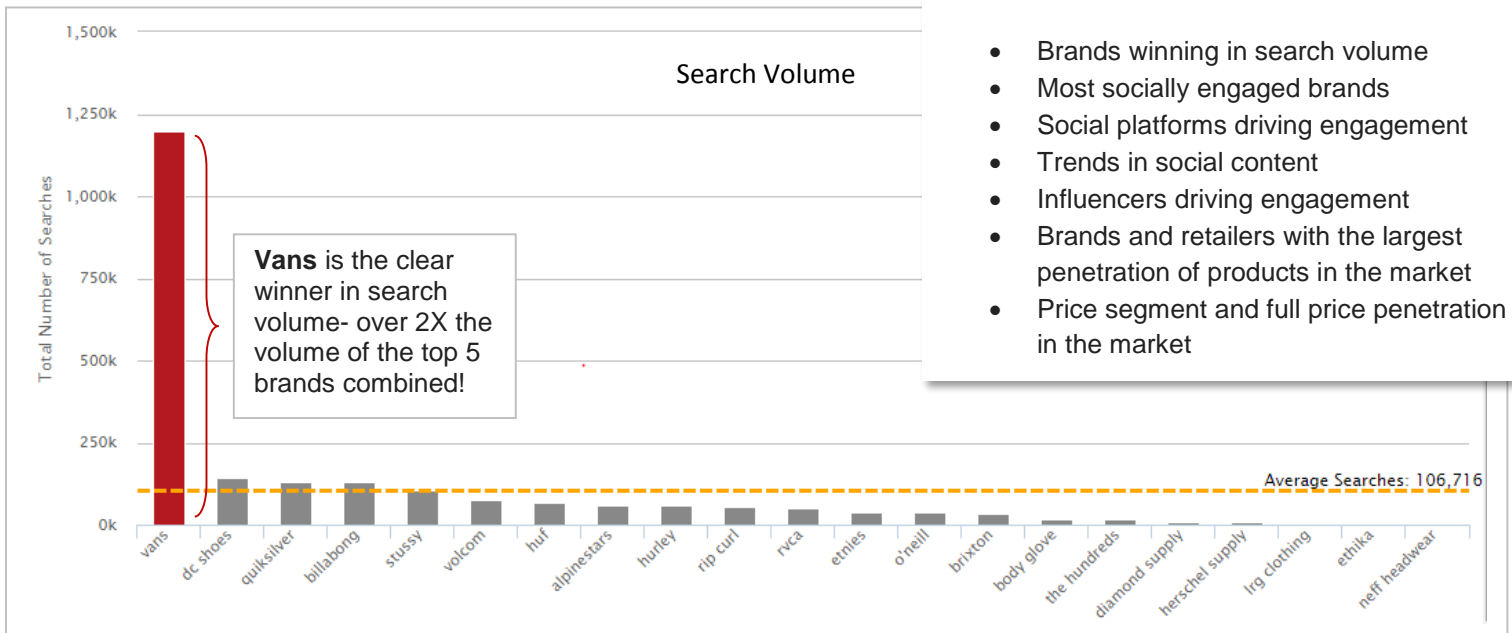


## Fans are for Posers. It's All About Engagement!

Trendalytics is a visual analytics platform that makes big data actionable for the retail industry. Trendalytics identifies surf and skate brands that are winning in the digital marketplace in search, social media, and e-commerce.

### Trendalytics shares insights on...

- Brands winning in search volume
- Most socially engaged brands
- Social platforms driving engagement
- Trends in social content
- Influencers driving engagement
- Brands and retailers with the largest penetration of products in the market
- Price segment and full price penetration in the market



### What are people surfing for?...

Trendalytics identifies the brands with the highest search volume:

**Vans, DC Shoes, Quiksilver, Billabong, and Stussy**

Vans is the clear winner in search volume- over 2X the volume of the top 5 brands combined!

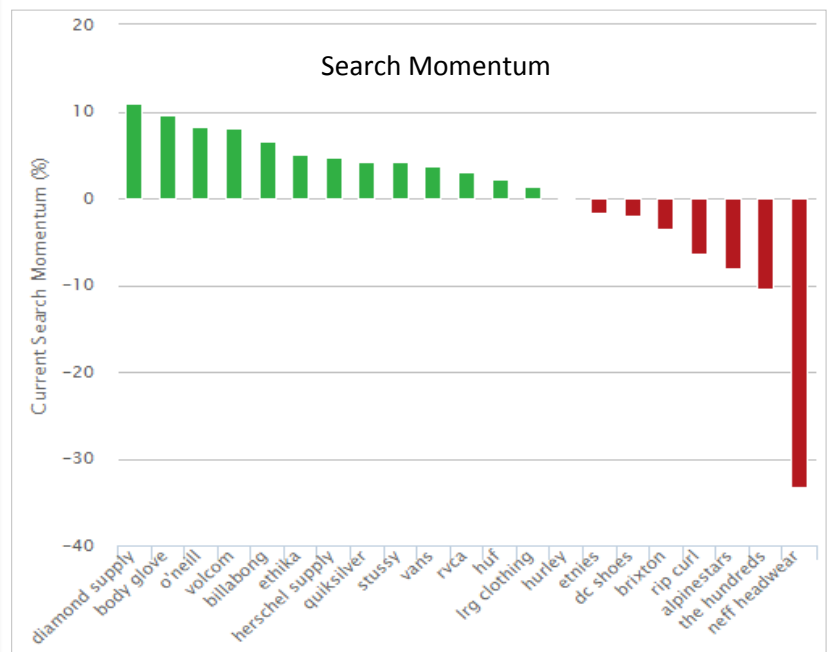
Across these surf and skate brands, the majority of brands' search volume has decreased to LY. Although there are a few highlights with increases to LY:

**Ethika +6%, Stussy +4%, Hurley +4%, and Alpinestars +3%**

Although no significant increases in search volume to LY, these brands show an increase in search momentum over the past 90 days:

**Diamond Supply Co. +11%, Body Glove +10%, O'Neill +8%, Volcom +8%, and Billabong +7%**

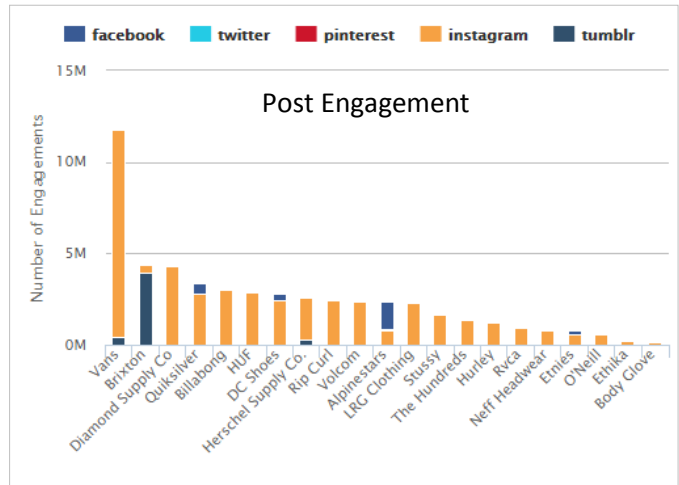
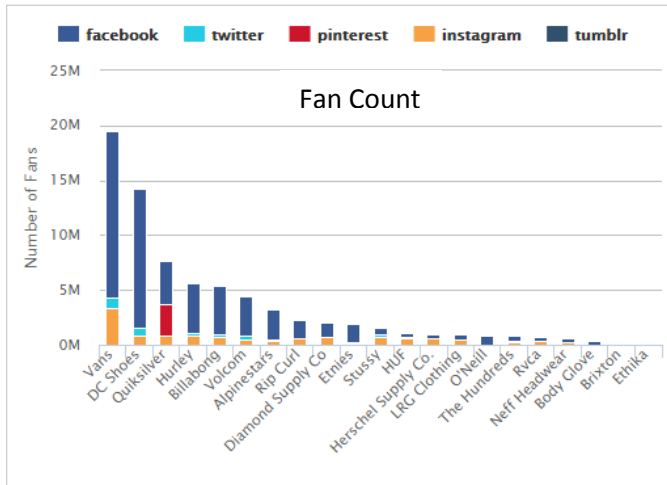
Now let's look at how these brands compare in the social media space...



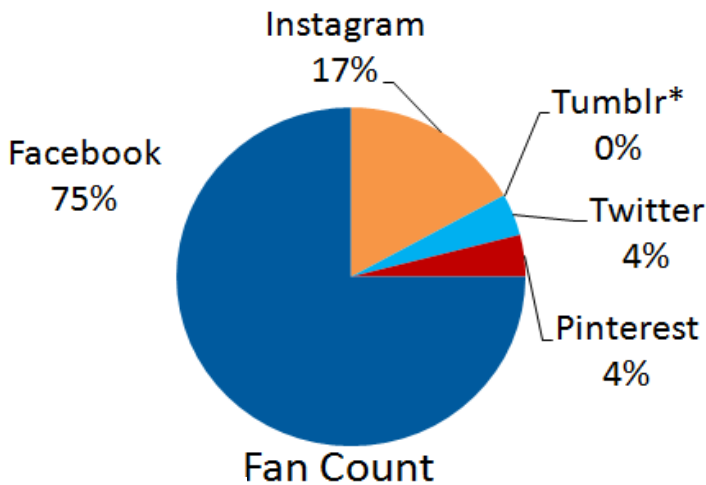
Diamond Supply Co. is leading in search momentum, a metric of a growing trend with an 11% increase over the past 90 days

## Fans and followers are a vanity metric...

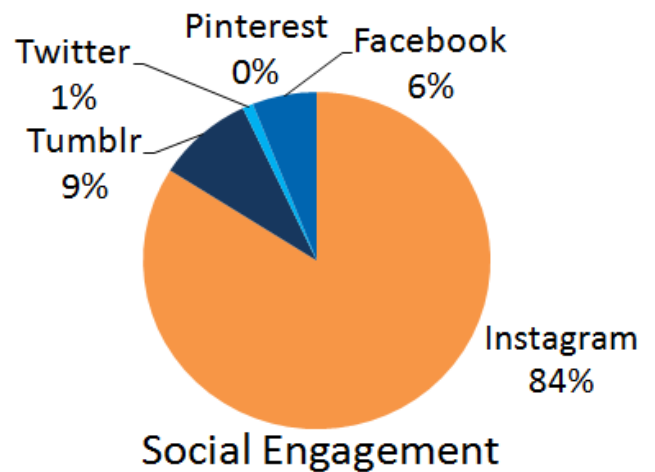
Although a retailer may have a lot of fans or followers, it doesn't necessarily mean they are actually driving engagement. The top 3 brands in fan count are: **Vans**, **DC Shoes**, and **Quiksilver**. However, of these brands, only Vans is within the top 3 leading in social engagement. **Vans**, **Brixton**, and **Diamond Supply Co.** are the most socially engaged.



Vans is #1 in both fan count and engagement over a 90 day period



\*Tumblr fan count



## Put your money where your mouth is...

Are you focusing your marketing budget on the social platform that drives the most engagement for your brand?

**Instagram** is the clear winner as the social platform driving the most social engagement across these surf and skate brands

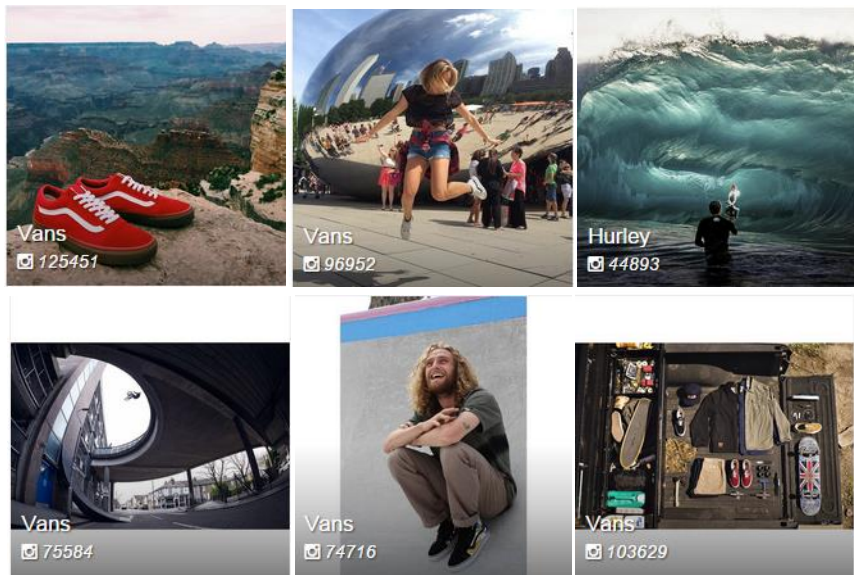
Although **75% of the total fan count** across these brands is on **Facebook**, only 6% of **post engagement** is driven by Facebook and a whopping **84%** is driven by **Instagram!**

**Instagram** is driving **13X more social actions** (likes, comments, posts, shares, etc.) than Facebook while Facebook has 5x more fans.

Although Instagram has the highest social actions, it isn't the platform with the highest number of posts. **35% of posts** were on **Twitter** while driving less than 1% of social actions. **20% of posts** were on **Facebook** which only drove 6% of social actions.

With new shopping features rolling out to Instagram, this social platform is becoming increasingly more important.

Examples of Top Content:



The right picture can be worth a hundred thousand words (or likes, tweets, posts, etc)...

What is the type of content winning in this space?

The overarching theme of these brands' content is a surf/skate lifestyle with less priority placed on product

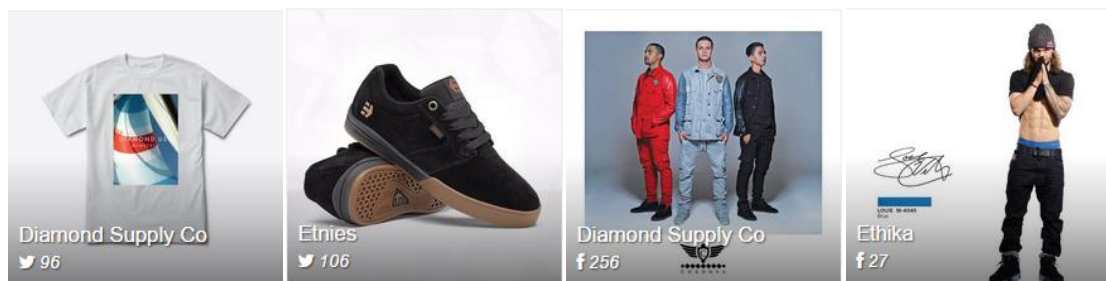
Successful content trends:

- Real people wearing the brand against interesting scenery (beach/nature)
- Artfully photographed surfing/ skateboarding images
- Events/celebrities within surf/skate world
- Artfully arranged collage flat layouts of head-to-toe outfits

What are the trends amongst less successful content?

- Very few model shots
- Single item flat lay shots
- Single product shots against plain backgrounds
- Static, non-dynamic images

Examples of less successful content:



With a little help from my friends...

Who wouldn't want a star athlete or blogger creating positive social buzz surrounding their brand? **Influencers** (industry defined tastemakers) helped drive an average of **30% more social actions** for these Surf & Skate brands.

Main Influencers among Surf & Skate brands:

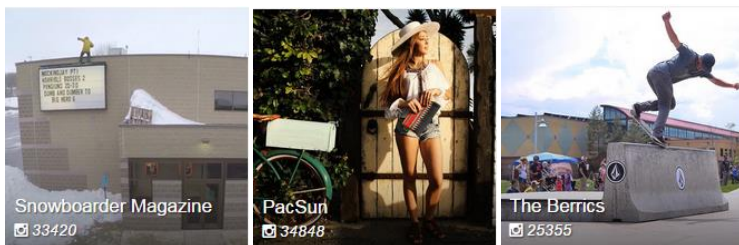
**Skateboarding Websites:** The Berrics, TransWorld, and SKATEboarding

**Bloggers** (streetwear/ sneaker enthusiasts) Kevin Ma, Matt Halfhill, Yu-Ming Wu, and Pete Williams

**Industry Magazines:** Snowboarder Magazine, SURFING Magazine, and The Skateboard Mag

**Surf & Skate Shops:** PacSun and Tilly's

**Over 35% of Vans, Volcom, and O'Neill's social engagement is driven by influencers** and over 25% driven by their top 10 influencers. On the flip side, **Herschel Supply Co. and Neff Headwear drove 99.7% of their own social actions** with little social actions from influencers.



Vans, Volcom, and The Hundreds are the brands whose influencers drove the most social engagement over a 90 day period. The top influencers were... Justin Bieber, The Berrics, PacSun, Snowboarder Magazine, and Kevin Ma (Hypebeast)

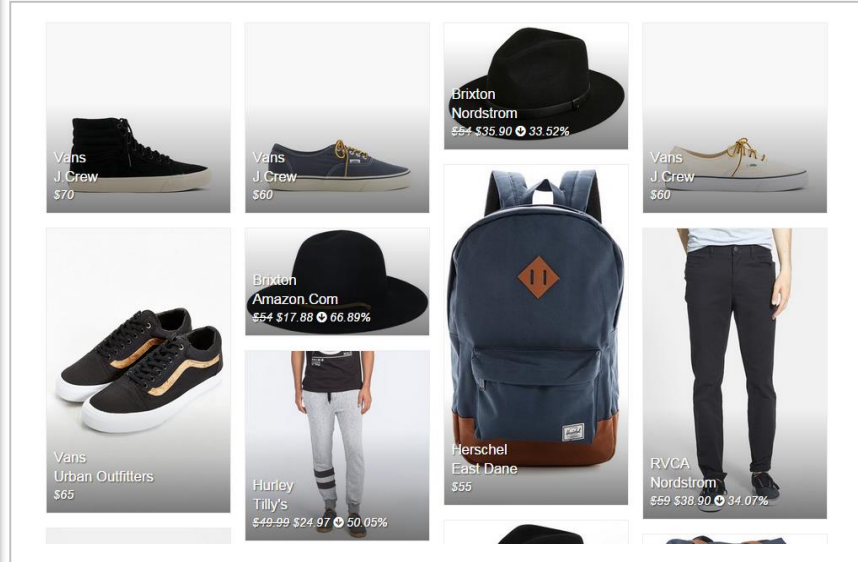
## How do you stack up against the competition?

Trendalytics analyses products in the market for these Surf and Skate brands through a Shopstyle partnership.

Across all full price and off-price retailers, **Volcom**, **Billabong**, and **Vans** represent the largest penetration (38%) of men's and women's products in the market and 41% of the full price products in the market.

Brands with the largest full price product penetration: **Diamond Supply Co. (85%)**, **Herschel Supply Co. (80%)**, and **Vans (72%)**

Brands with the lowest full price product penetration: **DC Shoes (23%)**, **Alpinestars (34%)**, and **Etnies (40%)**



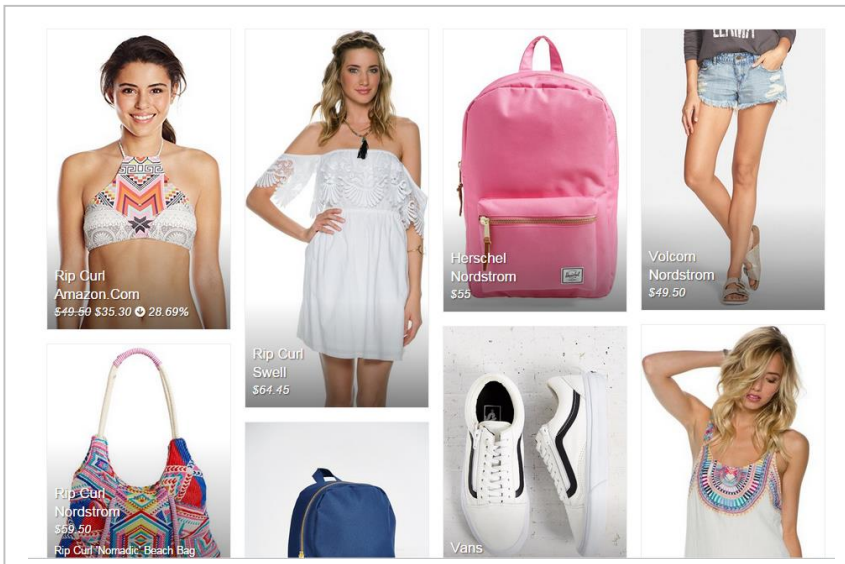
**Herschel Supply Co., Quiksilver, and Vans** are the brands with the widest distribution across retailers with an average distribution across 20 retailers

**Full price retailers represent 84% of products in the market across these brands**

Brands with largest off-price retailer representation: **Stussy (66% off price)**, **Etnies (38%)**, and **DC Shoes (33%)**

Largest penetration of products in market are within **\$25-\$50 price point**. Brands whose largest price segment penetration outside that price point: Brixton, Herschel, and Stussy (\$50-\$100), and HUF (\$0-\$25)

The retailers with the largest assortment across these brands are: **Amazon (24%)**, **Swell (13%)**, **Zappos (10%)**, **6pm.com (9%)**, **Tilly's (9%)**, and **Nordstrom (8%)**: These retailers represent 75% of products in the market.



## Call to Action...

- Dedicate more resources and increase focus on Instagram as this is the social platforms driving the highest engagement
- Feature compelling and dynamic content with a focus on brand lifestyle, surf/skate celebrity partnerships, collage flat lay images, etc.
- Key influencers have the ability to drive significant social engagement for a brand; opportunity for partnerships or collaborations?
- As a retailer, do you have the right vendor matrix based on trending brands? As a brand, are you aligning yourselves with the right retailers and market segment? Are you priced competitively?