

Digital Luxury  
Group.

## The Luxury Shoe Industry

Analysis of Consumers' Search Intentions and  
Brands' Social Media Presence

[www.digital-luxury.com](http://www.digital-luxury.com)

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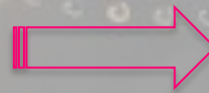
**“Give a girl the right shoes, and she can conquer the world.”**

# Objectives of this research

- The first digital analysis of the Luxury Shoe Industry
- Measuring the volume of searches of prestigious footwear brands on Google
- An analysis of the customers intentions & requests directed at the industry
- Social Media & Community Management: Facebook & Twitter

# Luxury Shoes Analysis in a Nutshell

Based on Google searches in the top luxury fashion markets



Data available upon special request



# ANALYSIS SCOPE

**57** Luxury Shoe Brands sorted in 3 categories

# MAISON

- Shoes do not represent more than 50% of revenues of the brand, presently nor in the past
- Created before 2000
- Alexander Mc Queen, Azzedine Alaia, Balenciaga, Bottega Veneta, Celine, Chanel, Chloe, D&G, Dolce & Gabbana, Dior, Givenchy, Gucci, Isabel Marant, Kenzo, Lanvin, Louis Vuitton, Marc Jacobs, Marni, Miu Miu, Prada, Ralph Lauren, Stella McCartney, Valentino, YSL



# SHOE HERITAGE

- Brand's original focus was on shoes, even if they have since expanded beyond that
- Shoes still remain major piece of business
- Bally, Casadei, Cesare Paciotti, Ferragamo, Fratelli Rossetti, GianMarco Lorenzi, Gina, Giuseppe Zanotti, Hogan, Jimmy Choo, Kurt Geiger, LK Bennett, Christian Louboutin, Manolo Blahnik, Pierre Hardy, Pura Lopez, René Caovilla, Roger Vivier, Sergio Rossi, Sigerson Morrison, Stephane Kelian, Stuart Weitzman, Tod's, Walter Steiger

# NEW PLAYERS

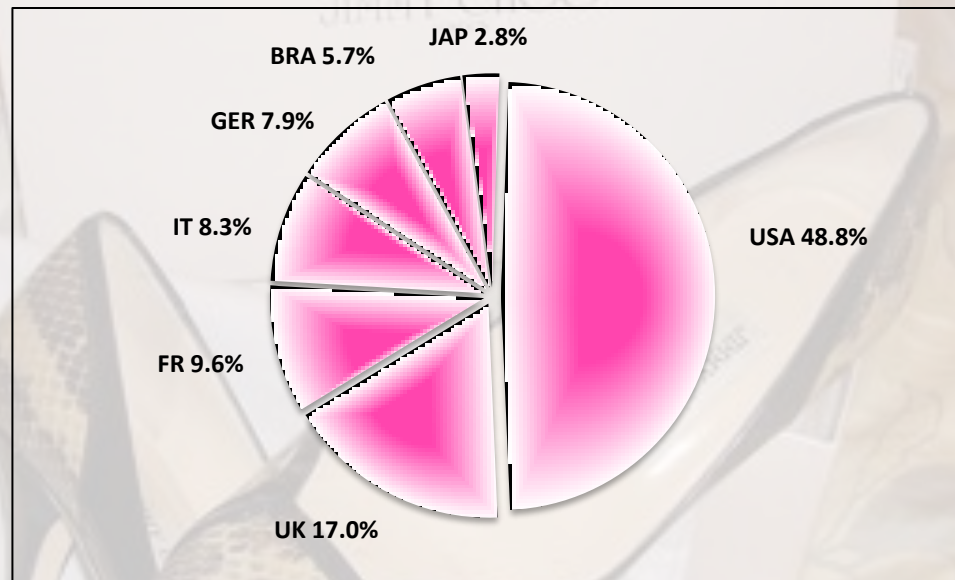
- Brand created after 2000
- Considered as a trendsetter by its peers – awarded, positive reviews in leading fashion magazines
- Alexander Wang, Alexandre Birman, Brian Atwood, Camilla Skovgaard, Charlotte Olympia, Derek Lam, Gianvito Rossi, Jonathan Kelsey, Nicholas Kirkwood, Reed Krakoff



# KEY HIGHLIGHTS

- The United States is the most important market for the industry with more than 40% of the searches
- 35% of the search intentions (brand searches not included) are related to styles
- 40% of online style enquiries are related to sneakers (in the US)
- Prada and Gucci combined represent nearly 50% of searches in their category – **MAISON**
- Christian Louboutin rocks the Web with 45% of the searches in its category – **SHOE HERITAGE**
- Two **NEW PLAYERS** represent close to 60% of the digital shares of their category
- Jimmy Choo and Christian Louboutin – The Facebook War
- Louboutin monopoly & Charlotte Olympia know-how on Twitter

## Focused on Google & the top luxury shoes industry markets

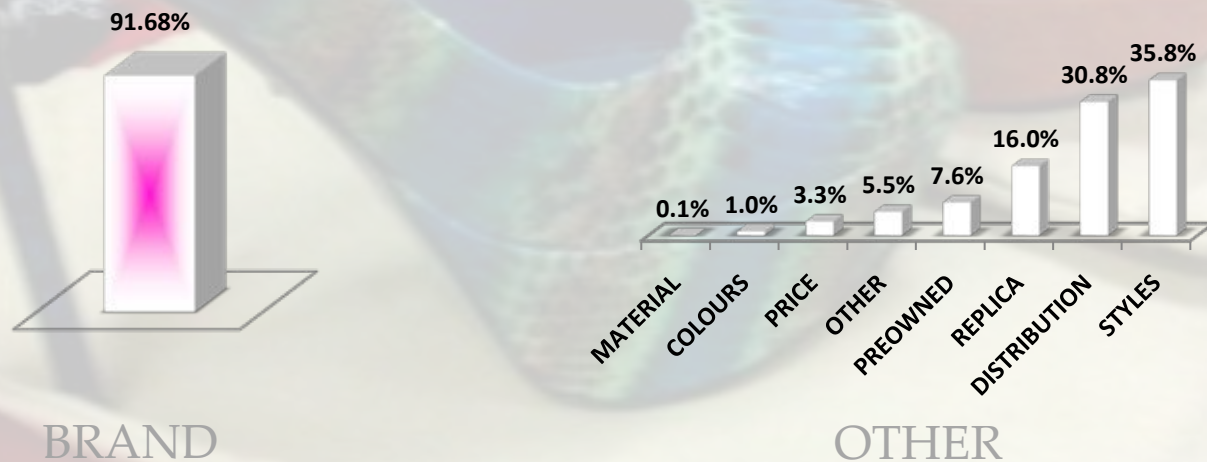


DLG –October 2010 to September 2011

- More than 40% of the searches were made in the US
- The United Kingdom is by far the first digital European market in the shoe Industry

# Search Intentions: Clientele's preferences towards luxury shoe brands

- 91.68% of the searches are brand-related
- 3.58% are related to styles (boots, ballerinas, high-heels, etc...) and 3% to distribution (POS, online shop, retailers, etc...)



DLG –October 2010 to September 2011

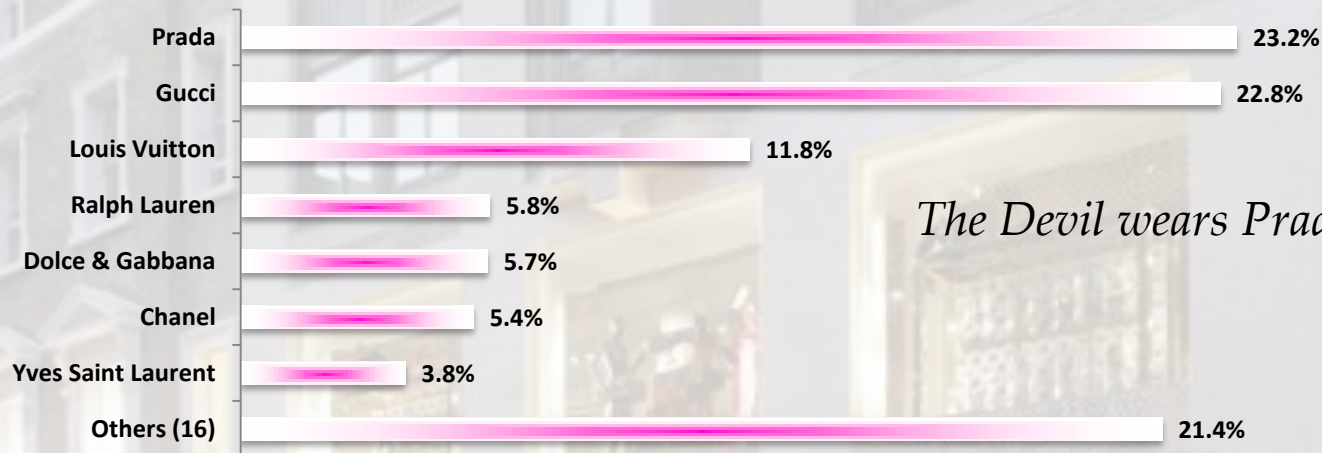
# FOCUS on STYLES in the US market

Results of 3 Million searches focusing on styles - Google US – period January to September 2011



“Sneakers” represents more than 40% of the searches, even though most brands do not produce sneakers

# Top 7 Most Searched Brands Per Category – MAISON(23)

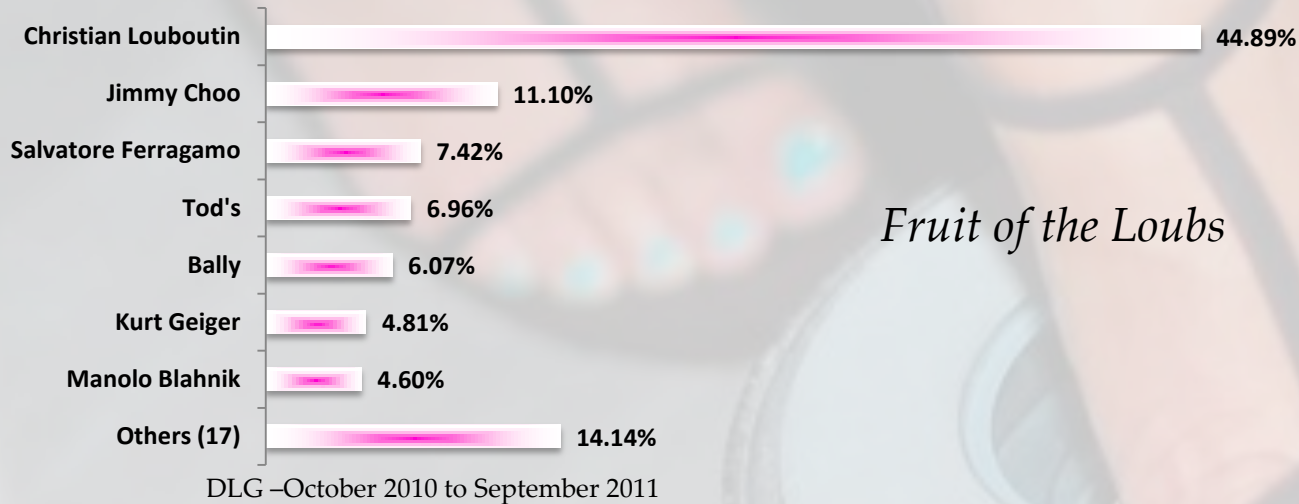


*The Devil wears Prada..*

DLG –October 2010 to September 2011

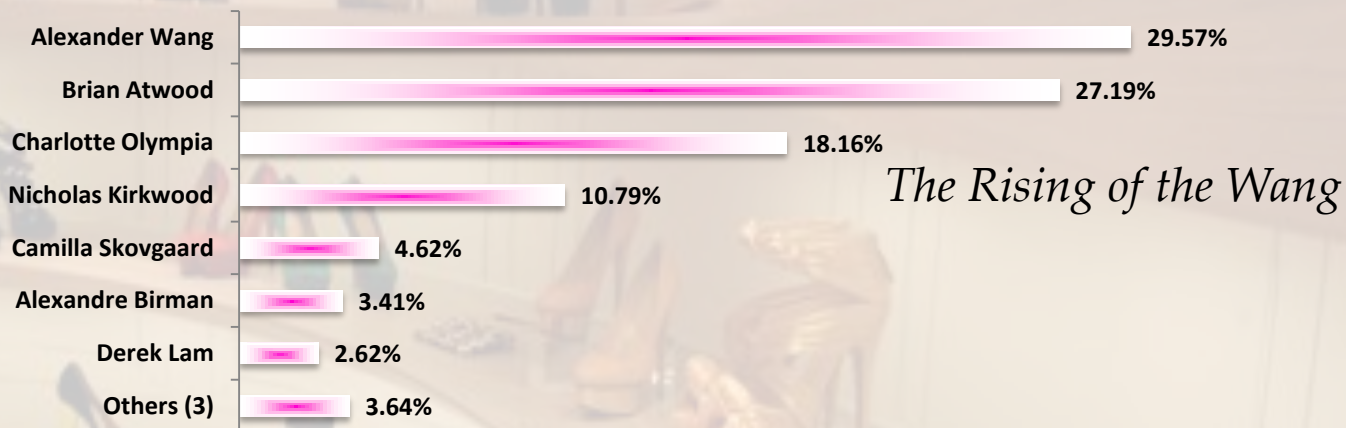
- Gucci & Prada show their strengths in the industry, while Dior ranks 8<sup>th</sup>
- Azzedine Alaia with 0.1% ends the ranking– pretty good for a brand with no corporate website

## Top 7 Most Searched Brands Per Category – SHOE HERITAGE (24)



- Christian Louboutin rocks the Web
- Jimmy Choo, Bally & Manolo Blahnik combined represent only half the amount of searches for Christian Louboutin

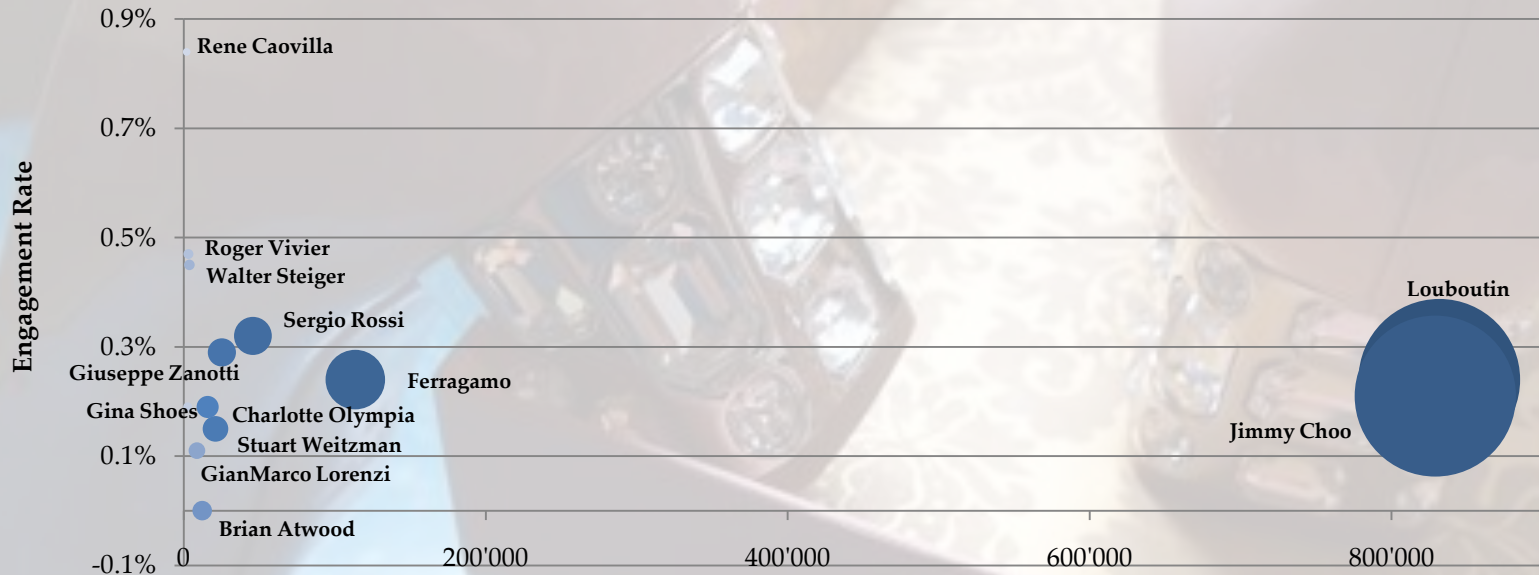
## Top 7 Most Searched Brands Per Category – NEW PLAYERS (10)



DLG –October 2010 to September 2011

- Two very tight players with more than 50% of market share combined
- An impressive position of the young and talented Charlotte Olympia with nearly 20% of the search volume

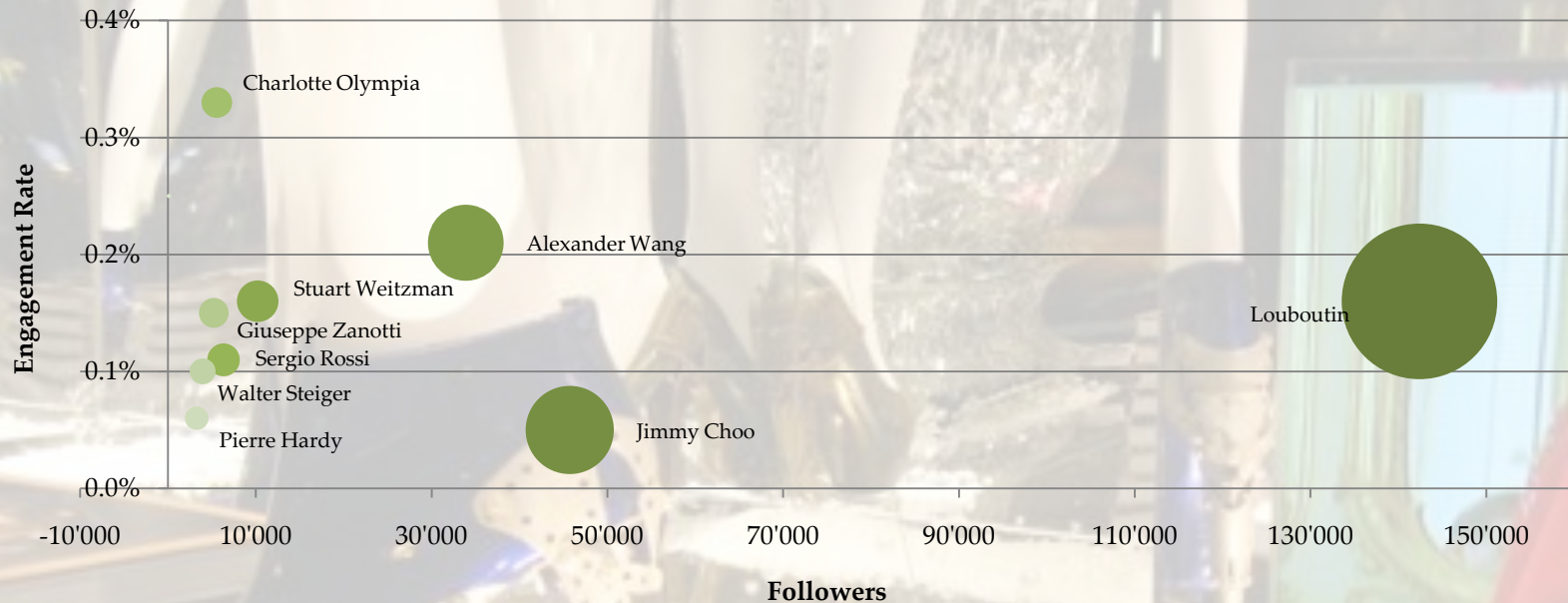
# Brand Engagement and Popularity on Facebook



- Jimmy Choo and Louboutin communities on Facebook are 4 times larger than all the other brands represented in this graph combined
- Brands like Gucci, Chanel and Dior (not on the graph) respectively account for an online community of 5.5, 4.7 and 5.3 million fans, each with an average engagement of 0.12%, 0.14% and 0.32% - Dior largely dominates the debate!



# Brand Engagement and Popularity on Twitter



- Once again Christian Louboutin shows his digital superiority on Twitter with a community 3 times that of Jimmy Choo and a much higher engagement rate
- Charlotte Olympia and Alexander Wang have a qualitative community with a very high engagement rate



**“A good shoe is one that doesn't dress you but undresses you.”**

- Christian Louboutin

# METHODOLOGY

## **Search Queries**

Extracted from search engines, the search queries collected encompass a large semantic field related to the brands and include synonyms, plurals and misspellings.

## **Languages**

Portions of these search queries are in English whereas some are translated from each key market language.

## **Data Collection and Analysis**

Public and professional tools are used to automate search volume collection, thanks to DLG's strong partnerships with search engines. Once collected, this data is filtered, analysed and translated into 10 intentions (brands, models, distribution, price, colour, etc...) using exclusive DLG technology.

## **Harmonization**

Since multi-product brands, such as Chanel, Dior or Gucci, may generate significantly more search volume than pure players, data is harmonized to identify shoes-only demand.

## **Facebook & Twitter engagement rates**

The engagement rate is a qualitative indicator measuring the level of interactivity between the brand and its fans/followers.



## WHO ARE WE?

Digital Luxury Group, DLG SA, is the first international company dedicated exclusively to the design and implementation of digital communication strategies for luxury brands.

- ✓ 10+ years of experience working for the most respected luxury brands
- ✓ Industry leader in watches and fine jewelry
- ✓ Strong international presence with partners in Geneva, New York, Shanghai & Dubai

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