



Digital Luxury
Group.

WORLD LUXURY INDEX™ Handbags

Céline Luggage Mini

June 2012

In partnership with
LUXURYSOCIETY

HANDBAGS – THE ULTIMATE LUXURY ACCESSORY



“Luxury handbags are the engine that drive luxury brands today.”

~ Dana Thomas

Deluxe: How Luxury Lost its Luster, 2007

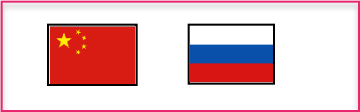
Handbags have become one of the most coveted items in the luxury goods market. The desirability, visibility and accessibility of luxury handbags have attributed to their strong performance and widespread recognition.

THE FIRST DIGITAL ANALYSIS OF THE LUXURY HANDBAG MARKET

130+ brands

130 million+ searches

8 Key Luxury Fashion Markets



Data available upon purchase

Unbiased insights from the world's top search engines

Google™

Baidu 百度

Yandex

bing

Using DLG DemandTracker™ technology, as featured in:





WHAT ARE THE MOST SEARCHED FOR LUXURY HANDBAG BRANDS GLOBALLY?

TOP 10 MOST SEARCHED LUXURY HANDBAG BRANDS GLOBALLY



1 **COACH**

6 **PRADA**

2 **LOUIS VUITTON**

7 **HERMÈS**

3 **CHANEL**

8 **MULBERRY**

4 **GUCCI**

9 **MARC JACOBS**

5 **LONGCHAMP**
P A R I S

10 **MICHAEL KORS**

Gucci Tigrette Shoulder Bag

TOP 50 MOST SEARCHED FOR LUXURY HANDBAG BRANDS



1 Coach	26 Ralph Lauren
2 Louis Vuitton	27 Vivienne Westwood
3 Chanel	28 Jimmy Choo
4 Gucci	29 Goyard
5 Longchamp	30 Alexander Wang
6 Prada	31 Givenchy
7 Hermès	32 Valentino
8 Mulberry	33 Versace
9 Marc Jacobs	34 Paul Smith
10 Michael Kors	35 Salvatore Ferragamo
11 Burberry	36 Stella McCartney
12 Chloé	37 Tod's
13 Céline	38 Rebecca Minkoff
14 Fendi	39 Loewe
15 Kate Spade	40 Bottega Veneta
16 Dolce & Gabbana	41 Diane von Furstenberg
17 Balenciaga	42 Moschino
18 Christian Dior	43 Bally
19 Tory Burch	44 Carolina Herrera
20 Miu Miu	45 Tom Ford
21 Yves Saint Laurent	46 Lanvin
22 Furla	47 Vera Wang
23 Armani	48 Hugo Boss
24 Lancel	49 Alexander McQueen
25 Calvin Klein	50 The Row

Coach Chelsea Handbag

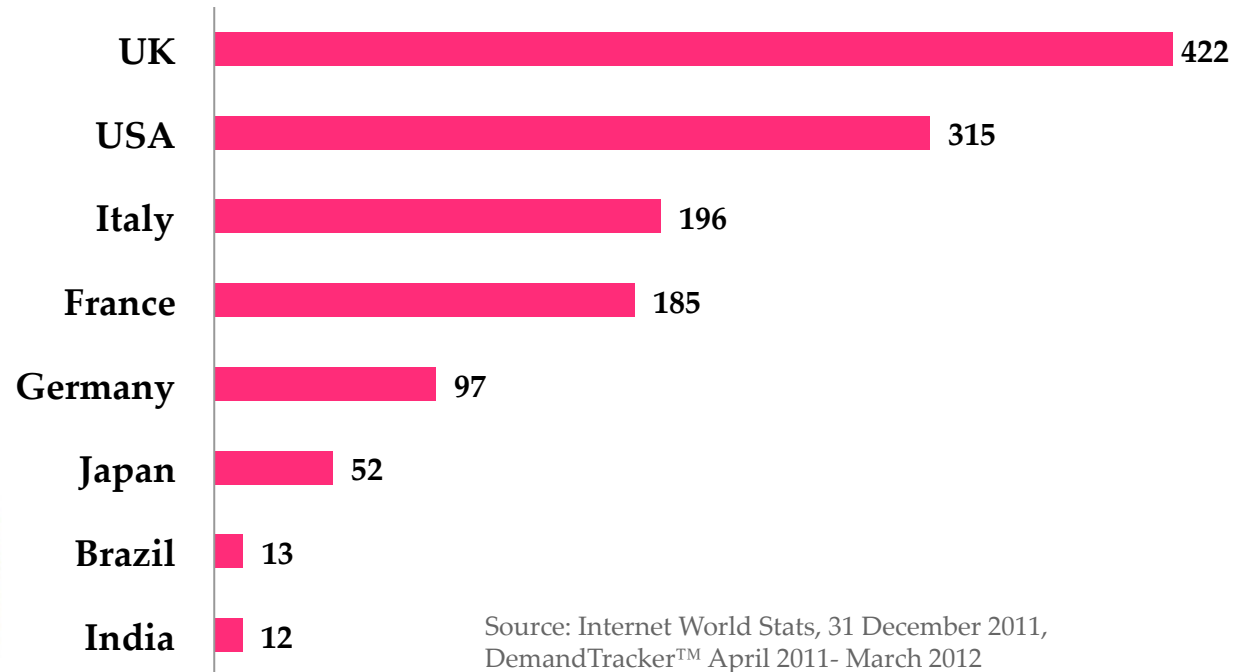


WHICH ARE THE MOST HANDBAG CRAZED MARKETS?

LUXURY HANDBAGS, THE UK'S CUP OF TEA



Handbag Affinity Index - Number of Handbag Searches per 1000 Internet Users



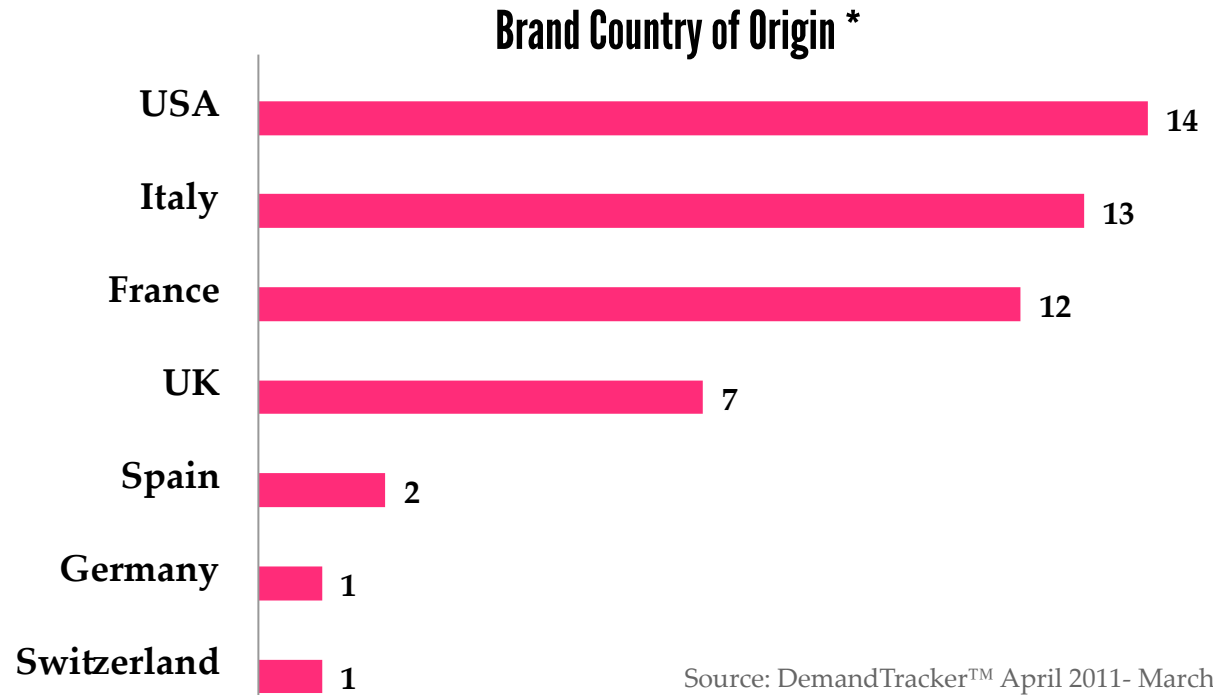
When measuring the demand against each market's internet population, the UK shows the highest affinity for luxury handbags with 422 searches per 1000 internet users

Mulberry Bayswater Satchel



WHICH COUNTRIES LEAD FOR BRAND COUNTRY OF ORIGIN?

AMERICAN HANDBAG BRANDS MAKING HEADWAY



Source: DemandTracker™ April 2011- March 2012
* Country where the brand was first established

Although the majority of the top 50 luxury handbag brands are European, American brands are proving their strength in the market

A woman is seen from behind, carrying a Louis Vuitton handbag. The bag is dark brown with the classic LV monogram pattern and features a vibrant, colorful floral design in shades of pink, red, and orange. The bag has tan leather straps and a gold-tone metal clasp. The woman is wearing a black, textured dress. The background is slightly blurred, showing other people in a public setting.

HOW DO THE BRANDS PERFORM ON A MARKET LEVEL?

MARKETS SUPRISES: VARYING DEMAND FOR LEADING BRANDS



- **JAPAN:** Japanese consumers move beyond Louis Vuitton handbags – The brand ranks 9th in Japan: the only country where Louis Vuitton does not rank in the top 5. Recently shared by *The Economist*, 85% of Japanese women already own a Louis Vuitton product. These combined statistics suggest that in Japan, consumers are looking for something “new”
- **EUROPE:** Coach less popular in the EU – Although it’s the no.1 global handbag brand, Coach ranks only 29th in Italy, 19th in France, 11th in Germany and 7th in the UK
- **BRAZIL:** Brazilians show a preference for niche handbag labels – Brands that do notably well in Brazil compared to other markets include Céline (ranked 3rd in Brazil, 13th globally), Balenciaga (7th in Brazil, 17th globally), and Goyard (11th in Brazil, 29th globally)

LOCAL BRANDS FAVORED IN THEIR RESPECTIVE MARKETS



- **FRANCE:** Longchamp, the most desired – The brand significantly leads in its home country with almost twice the searches for handbags than Louis Vuitton, which comes in 2nd
- **UK:** Demand reveals Mulberry as the bag of choice – Local brand Mulberry ranks in first place in the UK with almost twice the number of searches than 2nd brand Chanel
- **USA:** American brand Kate Spade making a comeback – The brand's renewed popularity places it in the top 10 ranking in the US



A CLOSER LOOK AT THREE ICONIC HANDBAGS

Hermès Birkin



The Hermès Birkin was created in 1984, inspired by British actress Jane Birkin. The bags are renowned for their craftsmanship and exuberant prices. Arguably, the Birkin is one of the most coveted bags today.

- The Hermès Birkin is the most searched for iconic model across all markets.

- Special tastes: In the US, UK & France, crocodile is the most-searched material

Crocodile leather from a Birkin Bag



- Most searched for colors by market:

Orange



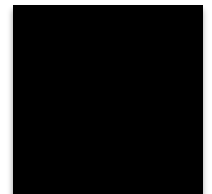
US

Tan



UK

Black



FRANCE

Chanel 2.55



Coco Chanel designed a revolutionary handbag for modern women during her time. The bag was named after the date of creation in 1955, and its timeless design has remained a hit throughout the years.

- The US has the largest share of searches for the 2.55, followed by Italy then the UK
- In the major markets, consumers searching for sizes most commonly search for jumbo, medium and mini respectively
- Most-searched for colors by market after the original Caviar (black):

Gold



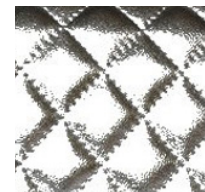
US

Beige



ITALY

Silver

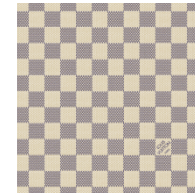


UK

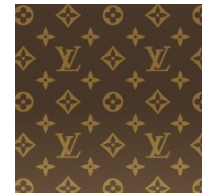
Louis Vuitton Speedy



- The largest share of searches for the Speedy come from the US, Germany, France and the UK respectively
- Different tastes in materials: In the US, the Damier canvas in Azur is the most searched material, whereas in the UK the traditional Monogram canvas is most popular



Damier Canvas in Azur



Monogram Canvas

The Speedy was introduced in the 1930s and skyrocketed to fame during the 1960s after being redesigned for superstar Audrey Hepburn. The bag comes in various sizes and materials and is one of the most recognized designer handbags.

- The most searched for Speedy sizes in the US, UK and France are the 30, 35, 25, 40 respectively



Left to Right : Speedy sizes 30, 35, 25, 40 - Photo source: Purseblog 17

ABOUT

The **World Luxury Index** is an international ranking and analysis of the most searched-for brands within the luxury industry. Covering over 400 brands within six key segments (fashion, beauty, jewelry, cars, watches, and hospitality) in ten key luxury markets, the **World Luxury Index** provides insights on the unbiased search inputs coming from global luxury consumers in the world's top search engines (Google, Bing, Baidu, Yandex). The result is a one-of-a-kind benchmark of the luxury brands capturing the attention of luxury-minded consumers around the world.

Digital Luxury Group has a history in luxury industry market intelligence. Since 2004, the **WorldWatchReport™** has provided the luxury watch industry with unmatched insights and garnered attention from the world's leading publications:



ABOUT

Digital Luxury Group.

www.digital-luxury.com

With offices in New York, Geneva, Shanghai, and Dubai, Digital Luxury Group (DLG) is the first international company dedicated exclusively to the design and implementation of digital communication strategies for luxury brands.

LUXURYSOCIETY

www.luxurysociety.com

Luxury Society is the world's most influential online community of top luxury executives. Based in Paris, with members in more than 150 countries, Luxury Society informs and connects CEOs, managers, journalists, consultants, designers and analysts from across the luxury industry.

Want to know more about the luxury handbag market?

The information provided in this document are excerpts from the **World Handbag Report**, a study produced by Digital Luxury Group.

The **World Handbag Report** is a 200+ page publication providing in-depth analysis deciphering the consumer demand for luxury handbags worldwide:

✓ 130+ fashion brands

The largest industry coverage

✓ 10 markets, including BRIC

Discover the most popular luxury brands for handbags as well clientele behavior in each key market for luxury bags

✓ 50 brand fact sheets

Main consumer demand metrics detailed for the Top 50 brands

✓ 10 iconic bags detailed analysis

Understand the success of key as well as trends in colors, material, styles and market preferences

Want to know more about the luxury handbag market?

Luxury brands turn to DLG's World Handbag Report in order to:

✓ Gain Insights on the competitive environment

Identification of key players, relative market share, most performing handbag styles and collections, etc.

✓ Decipher the local market clientele preferences

Analysis of key clientele concerns and preferences in the chosen markets

Subscription includes :

✓ A yearly report

✓ 2 updates a year on the latest product releases, and major moves in rankings, consumer behavior and preferences

Investment: 12,500 EUR

Key Report Metrics

- ✓ **Extended brand ranking (up to 130 brands in all 10 markets)**
- ✓ **10 market close-ups, including BRIC countries**
- ✓ **Detailed ranking of most in-demand lines, collections and models - per brand and market**
- ✓ **Analysis of clientele preferences per style, color and material - per brand and market**

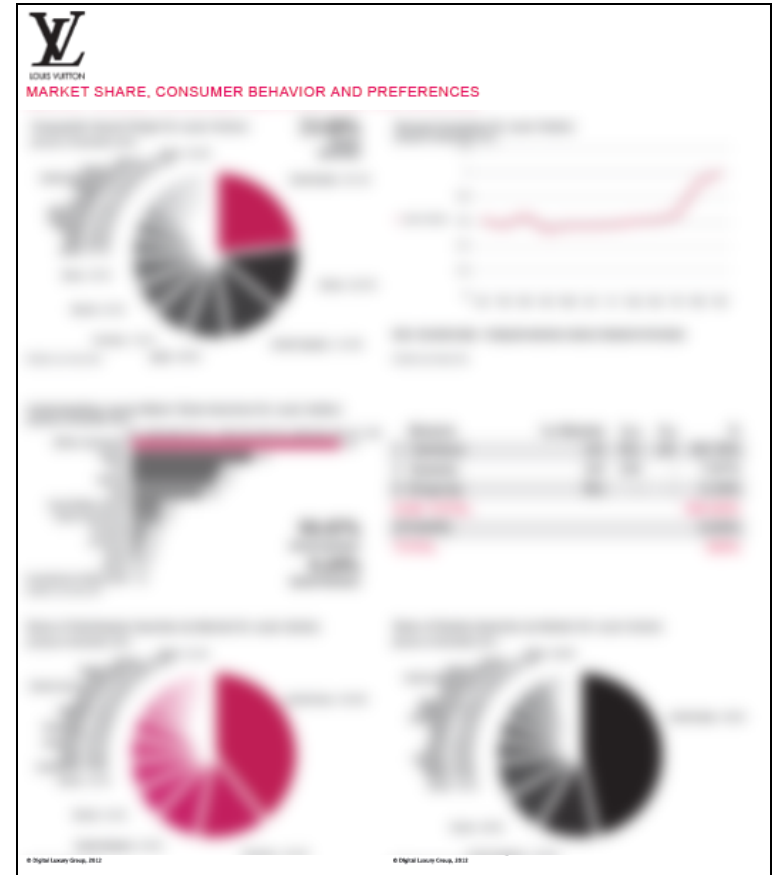
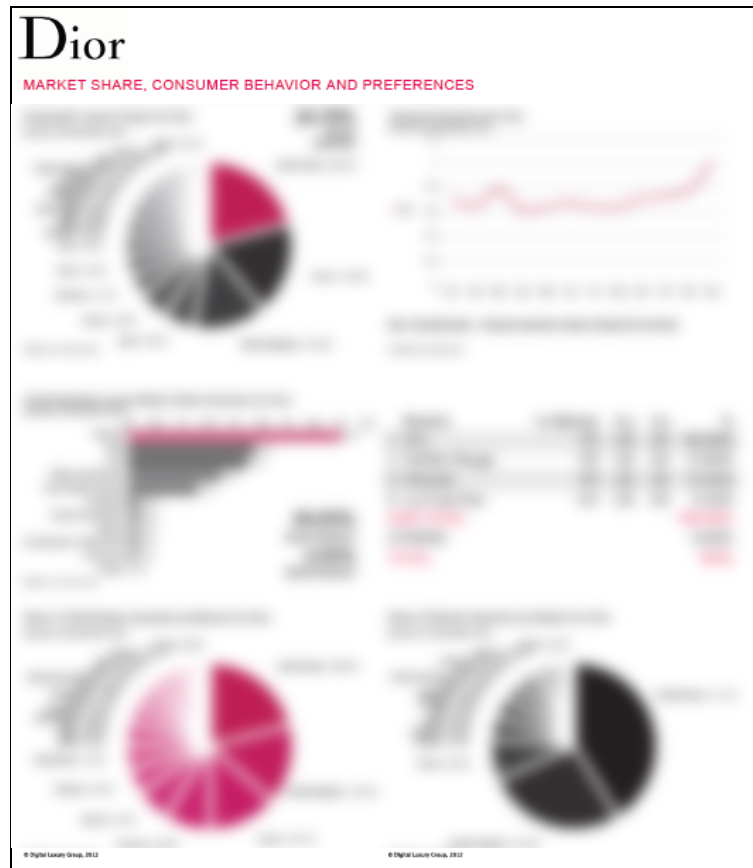
Report Samples

✓ 10 Market Close-ups



Report Samples

✓ 50 Brand Fact Sheets



For information on how to order e-mail: handbags@digital-luxury.com

Report Samples

✓ Detailed analyses of 10 iconic bags

Mulberry Alexa



The Mulberry Alexa was created in 2010 as a tribute to British style icon Alexa Chung. The handbag has been instrumental in making Mulberry one of [strongest performing](#) luxury fashion brands today.

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Louis Vuitton Speedy



The Speedy was introduced in the 1930s and skyrocketed to fame during the 1960s after being redesigned for superstar Audrey Hepburn. The bag comes in various sizes and materials and is one of the most recognized designer handbags.

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- The largest share of searches for the Speedy comes from the US, Germany, France and the UK respectively
- Different tastes in materials: In the US, the Canvas comes in favor as the most searched material, whereas in the UK the traditional Monogram canvas is most popular



Canvas (light beige)



Monogram canvas

- The most searched for Speedy sizes in the US, UK and France are the 30, 35, 25, 40 respectively



Brands Covered in the Report

3.1 Phillip Lim	Carlos Miele	Escada	John Galliano	Miu Miu	Shanghai Tang
A Testoni	Carolina Herrera	Etro	John Varvatos	Moncler	Smythson
Akris	Cartier	Fendi	Judith Leiber	Moschino	Sonia Rykiel
Alberta Ferretti	Celine	Foley + Corina	Kate Spade	Mulberry	St. John
Alexander McQueen	Chanel	Fratelli Rossetti	Kenzo	Nancy Gonzalez	Stella McCartney
Alexander Wang	Chloe	Furla	Kooba	Nina Ricci	Stuart Weitzman
Alfred Dunhill	Christian Dior	Gianfranco Ferre	La Perla	Oscar de la Renta	The Row
Ann Demeulemeester	Christian Lacroix	Giorgio Armani	Lacoste	Paco Rabanne	Thierry Mugler
Anna Sui	Christian Louboutin	Giuseppe Zanotti	Lancel	Paul Smith	Tod's
Anya Hindmarch	Church's	Givenchy	Lanvin	Paule Ka	Tom Ford
Aquascutum	Coach	Goyard	Lauren Merkin	Pierre Hardy	Tory Burch
Armani	Cole Haan	Gucci	Loewe	Pollini	Trussardi
Balenciaga	Comme des Garçons	Guy Laroche	Longchamp	Prada	Valentino
Bally	Costume National	Hackett	Loro Piana	Proenza Schouler	Valextra
Balmain	Derek Lam	Helmut Lang	Louis Vuitton	Rafe	Vera Wang
Barbara Bui	Diane von Furstenberg	Hermes	Maison Martin Margiela	Ralph Lauren	Versace
Berluti	Dior	Hervé Léger	Malo	Rebecca Minkoff	Viktor & Rolf
Berurutti	Dolce & Gabbana	Hogan	Manolo Blahnik	Reed Krakoff	Vivienne Westwood
Botkier	Donna Karan	Hugo Boss	Marc Jacobs	Rick Owens	Yohji Yamamoto
Bottega Veneta	Dries van Noten	Isabel marant	Marchesa	Roberto Cavalli	Yves Saint Laurent
Brunello Cucinelli	Dsquared	Issey Miyake	Marni	Rochas	Zac Posen
Bulgari	Dunhill	Jason Wu	Matthew Williamson	Rodarte	Zilli
Burberry	Elie Saab	Jean Paul Gaultier	Max Mara	Roger Vivier	
Calvin Klein	Emilio Pucci	Jil Sander	Michael Kors	Salvatore Ferragamo	
Canali	Ermenegildo Zegna	Jimmy Choo	Missoni	Sergio Rossi	

Order your copy of the World Handbag Report



To purchase the World Handbag Report or to request a custom analysis, please email:
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