



**WOMENSWEAR  
RETAIL RADAR  
SPRING COLLECTIONS  
SHOES**



**LIVETREND**

# RETAIL RADAR SHOES INTRODUCTION



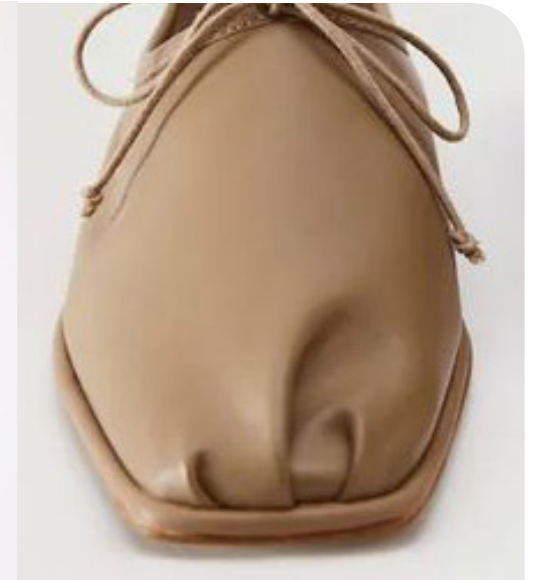
Loeffler Randall.webp



jil sander.jpeg



celine 2019.jpeg



mango.jpeg

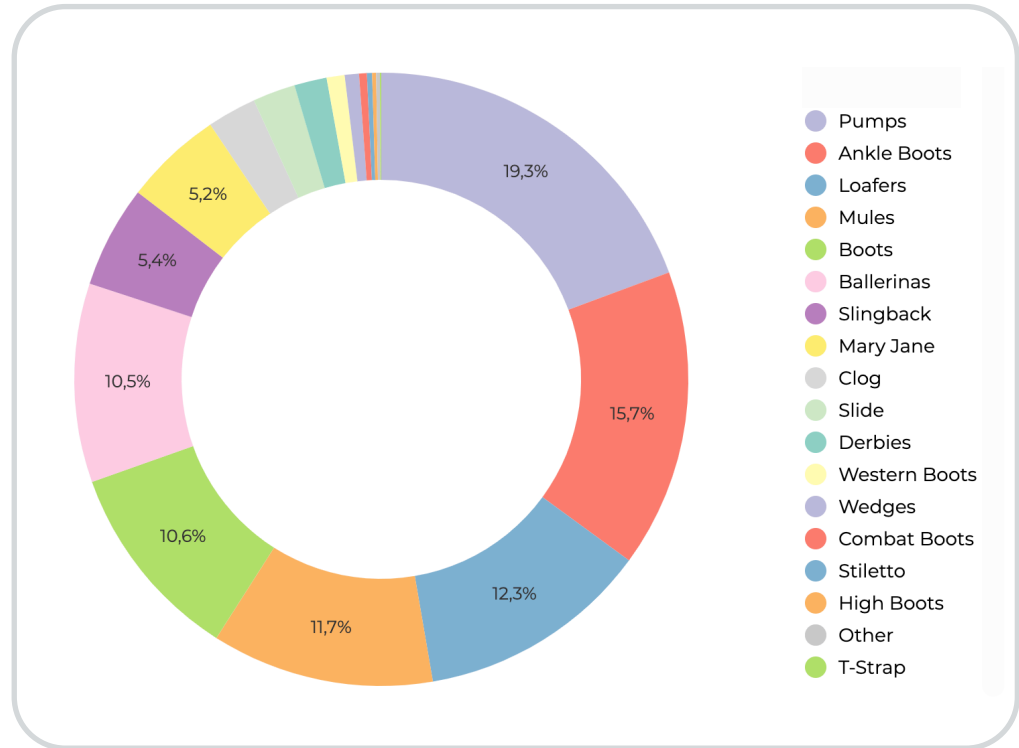
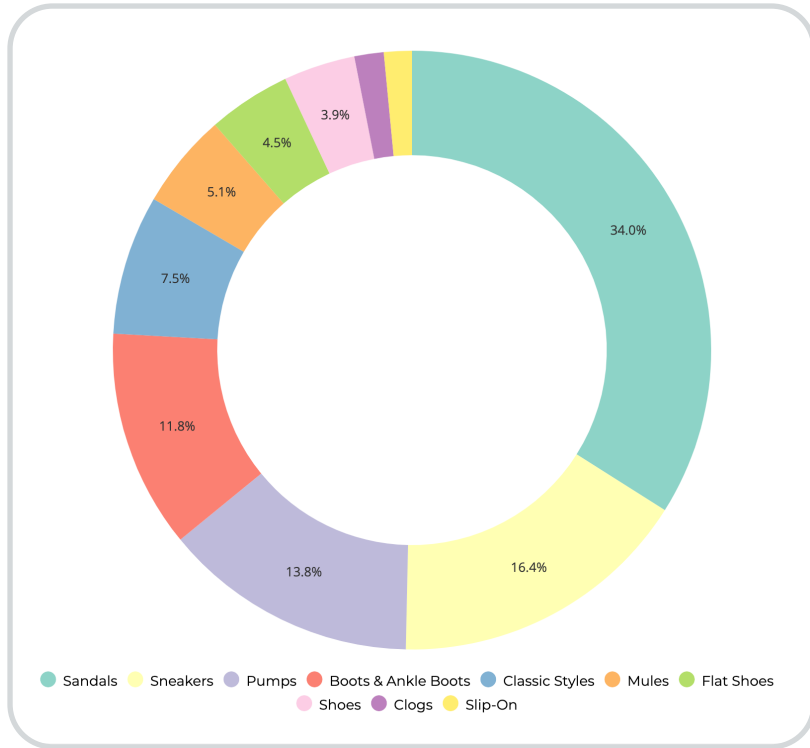


**UPDATE**

**Ballet of Blossoms.** The footwear collections are undergoing a delightful transformation. Talking about trends: heels, once towering and bold, are taking a step back as lower styles are gaining prominence. The spotlight now shines on flat shoes, with the timeless ballet flat experiencing a triumphant resurgence, reinvented in various captivating forms. Mary-janes are bringing preppyness and are picking in visibility, showing that the market will probably soon be saturated and consumers looking for new interpretations. Block and kitten heels are playing between retro and modern styles as several new propositions of toe styles. Materials gracefully follow a delicate path, embracing soft leathers, gatherings and light fuzz that adds a touch of whimsy to spring footwear. Romantic transparencies further enhance the feminine allure, emphasizing delicacy over sensuality. In this evolving landscape, the spring shoe collections epitomize a subtle elegance, where comfort meets style, and femininity embraces a more nuanced, delicate charm.

*This report is based on Livetrend data extracted from e-commerce on the European market from 1/02/24 to 15/03/24, analysing the visibility and growth of the trends compared to the same period last year. The percentages show the visibility evolution year on year.*

# RETAIL RADAR SHOES **PRODUCT ASSORTMENT**



In the spring footwear assortment, comfort and femininity are a prominent duality showcased through a variety of styles. From heels to flat shoes, women are showing versatile styles worn from the office to free time. At beginning of spring, sandals and slides are taking 34% of the assortment, while mules & clogs are at nearly 7%. Then 16% of the range is taken by sneakers, followed by pumps at nearly 14%. Boots are at 12% and Classic Styles are maintaining a 7,5% of the spring range, within loafers are on top position. Ballerinas have 10% of market shares on sub-categories, growing 51% to last year and demonstrating the predicted growth for this season. Sling-back are another important trendy style for spring as much as mary-janes taking respectively 5% of sub-category range, growing 65% from last year.

# RETAIL RADAR SHOES MATERIALS

**FUZZ**  **+47%**  
YEAR ON YEAR



EARLY SIGN

Burberry.avif

Mango.avif

Jil Sander.jpg

**MESH**  **+15%**  
YEAR ON YEAR



EDGY TREND

Freepeople\_1.webp

The Row.avif

Zara (2)\_1.jpg

**SUEDE**  **+40%**  
YEAR ON YEAR



STABLE TREND

Zara (3).jpg

Maje.webp

Rivecoeur.webp

**METALLIC**  **+10%**  
YEAR ON YEAR



SAFE TREND

Zadig & Voltaire.jpg

Zara (4).jpg

Freepeople\_2.webp

# RETAIL RADAR SHOES **TOE EVOLUTION**

## POINTY



Zara\_8.jpg

  
**+29%**  
YEAR ON YEAR

## SQUARE



Jacquemus.avif

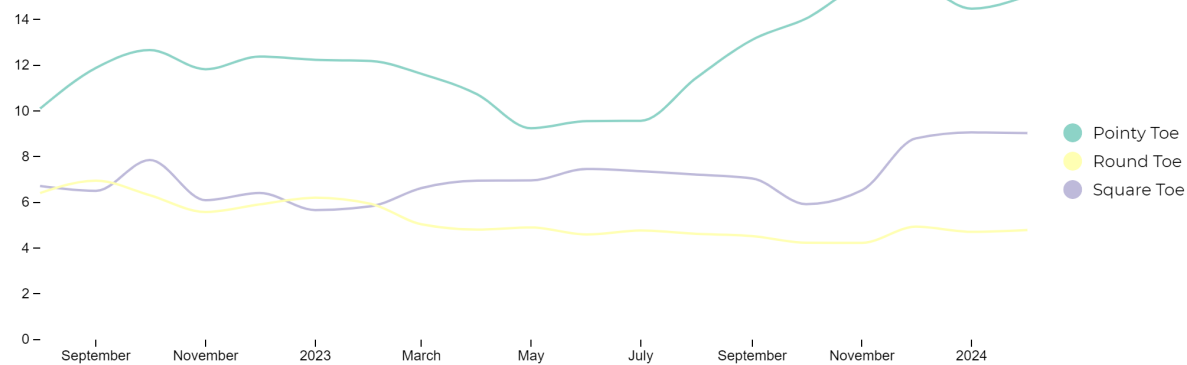
  
**+36%**  
YEAR ON YEAR

## ROUND



&Other Stories.jpg

  
**-5%**  
YEAR ON YEAR



Pointy and squared toe shapes are emerging as frontrunners, taking respectively 51% and 35% of the range, they are manifesting a growth of +29% and +36% on the e-commerce to last year, accentuating angular shapes and infusing a touch of fashion allure, transforming each step into a statement of bold sophistication.

# RETAIL RADAR SHOES HEELS EVOLUTION

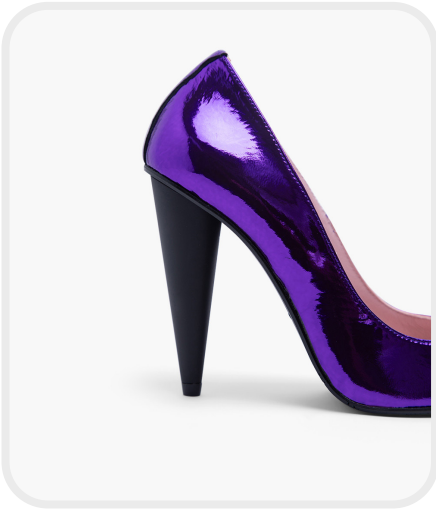
## PLATFORMS



Call it Spring.webp

  
**-29%**  
 YEAR ON YEAR

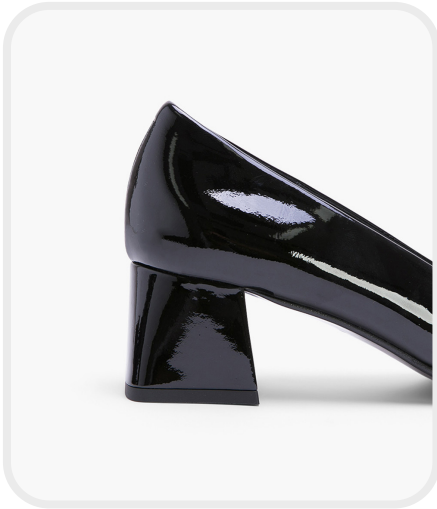
## HIGH HEELS



Ras.jpg

  
**-3%**  
 YEAR ON YEAR

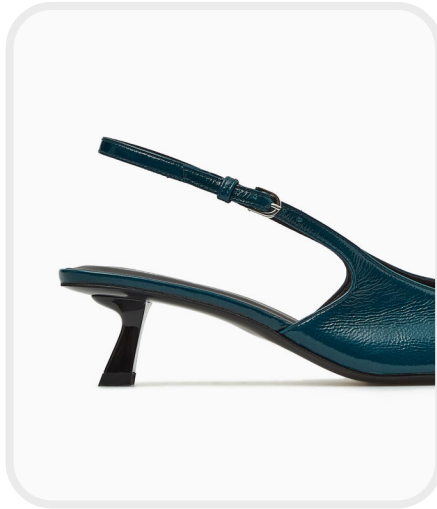
## BLOCK HEELS



Zinda.jpg

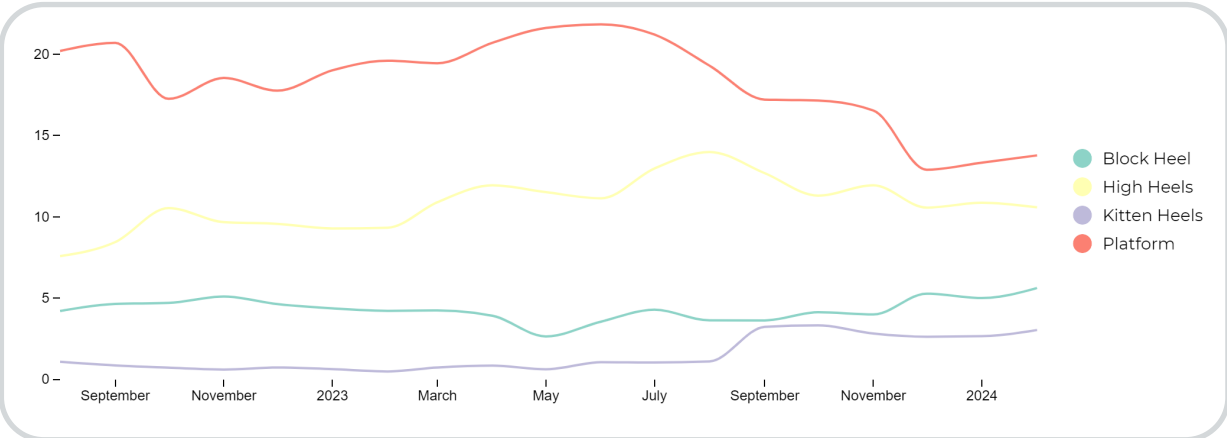
  
**+33%**  
 YEAR ON YEAR

## KITTEN HEELS



Cos\_2.jpg

  
**+316%**  
 YEAR ON YEAR



In the emerging trends, heel are undergoing a subtle transformation. Platforms witness a consistet decrease in favor of the charm of block heels and kitten heels. Their ascent seamlessly intertwined with the growing influence of classic tailoring and ladylike aesthetics, as we detected in the latest FW24 fashion shows.



# SHOES DETAILS **HEELS**

## THE **BENT HEEL**



Bottega Veneta (2).jpg

Stuart Weizman.webp

Balenciaga.webp

STABLE TREND

## THE **NEW STILETTO**



Balenciaga.jpg

Mango (4).avif

Loewe\_2.jpg

EARLY SIGN

## THE **ANGULAR WEDGE**



jeffrey campbell\_2.webp

Off White.webp

The Attico (3).jpg

EARLY SIGN

## THE **MICRO HEEL**



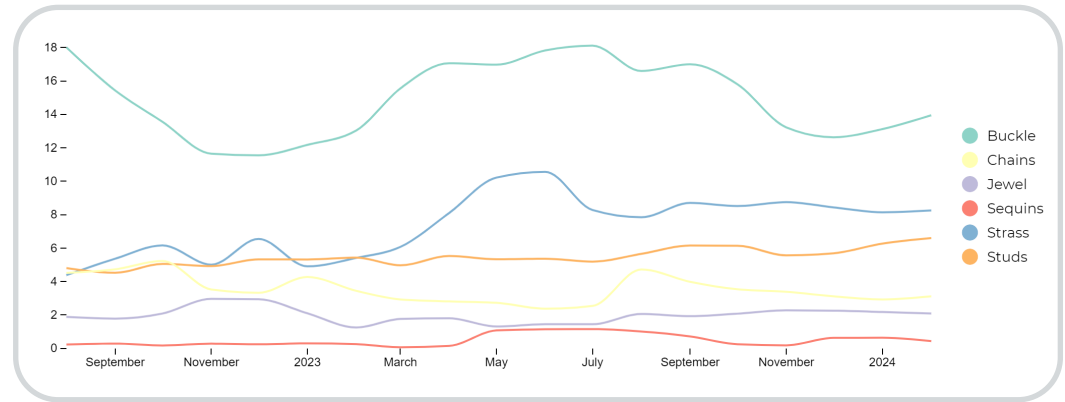
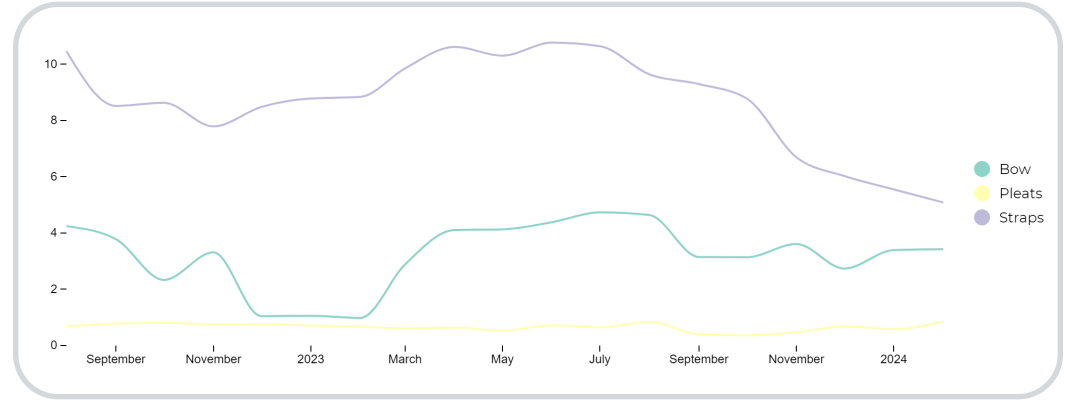
Courreges\_1.jpg

Jil Sander.avif

Zara\_7.jpg

BIG TREND

# RETAIL RADAR SHOES **DETAILS EVOLUTION**



For Spring, shoe details are definitely bringing a certain sophistication with scrunchy soft effects that are experiencing a remarkable surge, marking a substantial increase of +51% in the market. Subtle gatherings are triumphing, creating a visual allure that resonates with modern minimalistic taste, which is becoming firmly established. Bows emerge as a key embellishment, witnessing a remarkable rise of +56%, amplifying the delicate femininity of footwear designs. Additionally, strass, with its sparkling charm, takes a leap of +16% on footwear, while studs are becoming metallic jewels and sophisticated hardware is embellishing the ankles, adding a touch of glamour to the overall ensemble. In contrast, a certain rebellious spirit stands out and embellishes the products with bold metallic hardware that makes biker boots more aggressive and micro strappy buckled sandals and slingbacks more daring.



# SHOES DETAILS **STYLES & TRIMS**

  
**+51%**  
YOY

## SCRUNCHED



SAFE TREND

mango.jpeg

Ulla Johnson.webp

Carel.jpg

## HAND-TIED



SAFE TREND

Alohas\_3.png

Jil Sander\_1.jpg

Hereu\_1.webp

## DOUBLE MATERIALS



EARLY SIGN

Jil Sander\_1.webp

Toteme\_1.avif

Courreges\_2.jpg

  
**+56%**  
YOY

## BABY BOWS



BIG TREND

Alohas\_2.png

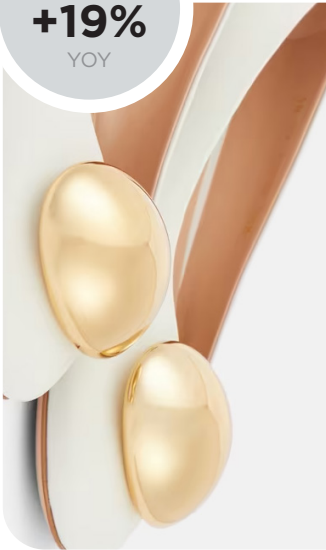
Claudie Pierlot.jpg

Reformation\_1.webp

# SHOES DETAILS **STYLES & TRIMS**

  
**+19%**  
YOY

## BULBS



Gianvito Rossi.avif



Cult Gaia\_1.webp



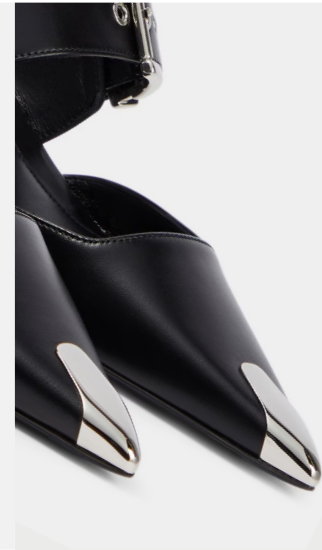
Zara\_10.jpg

EARLY SIGN

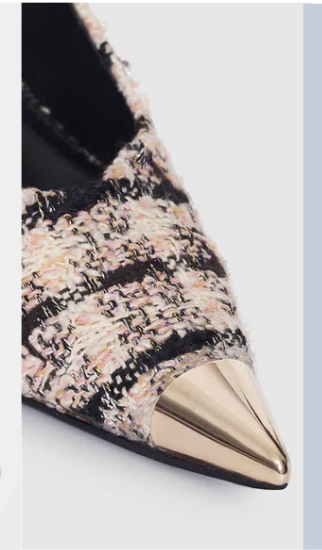
## METAL CAPS



Sportmax.webp



Mcq.avif



Anina Bing.webp

SAFE TREND

## ANKLETS



Fendi.png



jimmy choo.avif



Alohas 2.png

EARLY SIGN

  
**+16%**  
YOY

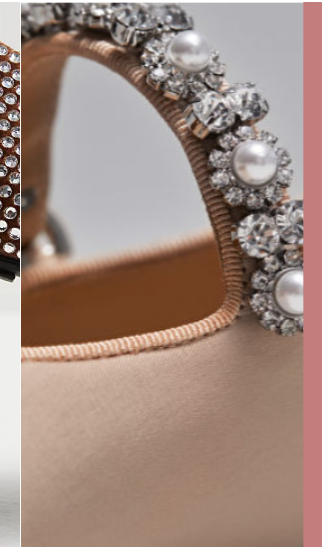
## STRASS



Mango\_2.avif



Jeffrey Campbell\_3.webp



&Other Stories.png

BIG TREND

# RETAIL RADAR SHOES **BOOTS**



As an important item for Spring, boots undergo a captivating evolution, where the persistent charm of western style takes on a softer allure in the form of supple suede. Texan boots, a perennial favorite, receive a contemporary update with a more minimalistic touch. The landscape of boots is further transformed with intriguing experiments, featuring boxier silhouettes and shrunken thighs that redefine traditional expectations. From the fusion of modular sandals elevated into boot structures to the allure of multi-buckled mary-janes and the sleek sophistication of kitten boxy boots, this season's range is a canvas of revisited classic shapes and rocky styles, inviting fashion enthusiasts to play between refined elegance, bohemian attire and sporty rock styles.

# RETAIL RADAR SHOES **BOOTS**



MANIFEST

## THE SUEDE COWBOY

**+70%**  
YEAR ON YEAR



Maje.webp



Aeyde.webp



Guess.webp



balzac paris.webp



Ba&sh.jpg

SAFE TREND



INVEST

## THE WALLABEE BOOT

**+20%**  
YEAR ON YEAR



SeebyChloe.webp



Clarks.webp



Charles Keith\_3.jpg



Zara\_4.jpg



Pull&Bear.jpg

SAFE TREND

# RETAIL RADAR SHOES **BOOTS**



INVEST

## THE BUCKLED BIKER



**+190%**  
YEAR ON YEAR



miu miu.webp



acne studios.webp



-sasha-.webp



\_golden goose.webp



reformation\_2.webp

**BIG TREND**



TEST

## THE COMBAT MARY-JANE



**+30%**  
YEAR ON YEAR



Laura Bellariva.webp



Zara\_2.jpg



Jeffrey Campbell\_1.webp



Juun J.webp



Steve Madden.webp

**EARLY SIGN**

# RETAIL RADAR SHOES **BOOTS**



INVEST

## THE **BOXY KITTEN BOOT**

**+80%**  
YEAR ON YEAR



Coperni.webp



Alchimia (3).jpg



Toteme.webp



\_amina muaddi.webp



Jil Sander.webp

SAFE TREND



TEST

## THE **CUISSARDE**

**+37%**  
YEAR ON YEAR



sezane-cuissarde.avif



paris texas.avif



SASHA.webp



guiseppe zanotti.jpeg



scarosso x.jpeg

EARLY SIGN

# RETAIL RADAR SHOES **HIGH BOOTS**



TEST

## THE MODULAR SOCK BOOT

**+86%**  
YEAR ON YEAR



Alexander Wang.jpg



Ferragamo.jpg



magda-butrym-.jpg



Twinsset.webp



Charles Keith\_1.jpg

EDGY TREND



TEST

## THE FOLDED BOOT

**+144%**  
YEAR ON YEAR



Charles Keith.webp



STEVE MADDEN.avif



Freepeople\_3.webp



The Attico.jpg



LeSilla.webp

LAST CALL

# RETAIL RADAR SHOES **FLATS & HEELS**



In the Spring footwear assortment, flat shoes gracefully take center stage, embodying a low-key luxury that defines the transitional season. Ballerinas emerge as versatile protagonists, seamlessly transitioning from office to occasion wear. This timeless shape is reinvented with preppier add-ons or kept minimal and essential, offering a spectrum of styles to suit diverse tastes. Pumps, on the other hand, undergo a transformation towards easier shapes. Block heels with squared toes revisit the chic side of the retro aesthetic, while higher and rounder options nod to the emerging #grannycore trend. Mary-jane ballet flat are the most searched product of Spring footwear, making buckled straps the detail of the season from preppy to rock styles. Sling backs and mules are another dominating style as more masculine loafers adorned with soft gathers as seen in many other styles, to enhance this comfortable glove effect of the shoes.



# RETAIL RADAR SHOES **FLATS**



MANIFEST

## THE MARY-JANE FLAT



**+135%**  
YEAR ON YEAR



Alohas 2\_1.png



Zara\_11.jpg



cos.jpeg



carel.jpeg



Vagabond.jpg

**BIG TREND**

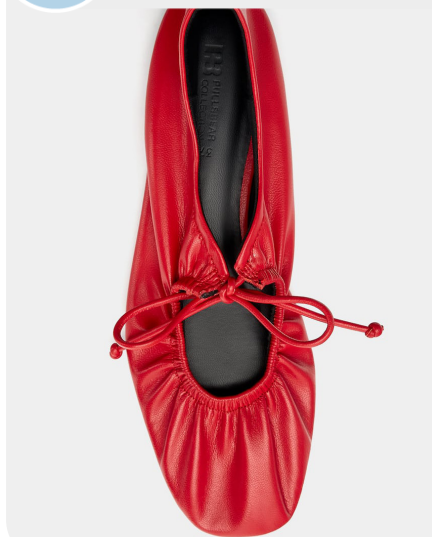


INVEST

## THE SCRUNCHIE BALLERINA



**+218%**  
YEAR ON YEAR



Pull&Bear\_1.jpg



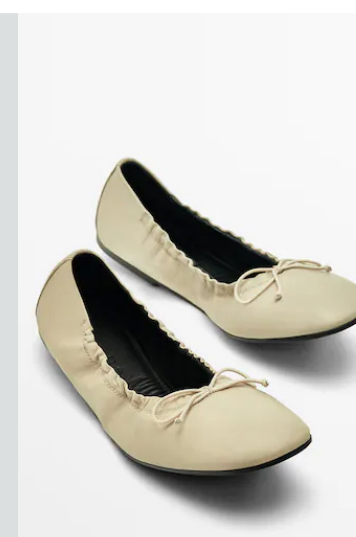
Anonymouscopenhagen.webp



COS\_3.jpg



JW Anderson.avif



Massimo Dutti (3).webp

**SAFE TREND**

# RETAIL RADAR SHOES **FLATS**



TEST

## THE SHEER BALLETT FLAT

+426%  
YEAR ON YEAR



anthropolgy-8.webp



khaite.avif



loeffler randall3.webp



-dear-frances-.webp



loeffler randall22.webp

EDGY TREND



INVEST

## THE MINIMAL CLOG MULE

+147%  
YEAR ON YEAR



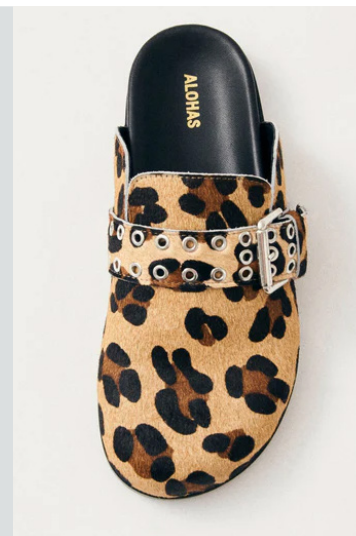
marsell.webp



row.webp



charleskeith 3.jpeg



\_alohas6.jpg.webp



anthropolgy-7.webp

STABLE TREND

# RETAIL RADAR SHOES **FLATS & LOW HEELS**



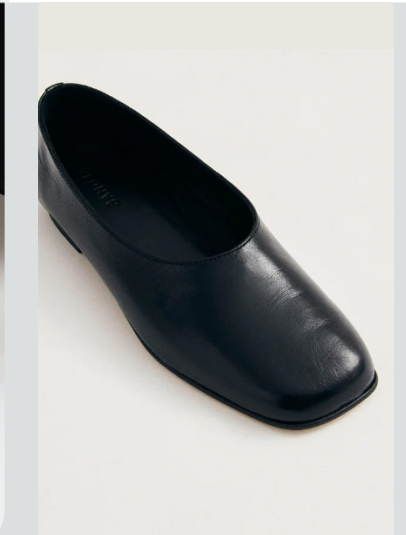
TEST

## THE MONK SLIP-ON

**+167%**  
YEAR ON YEAR



the row.webp



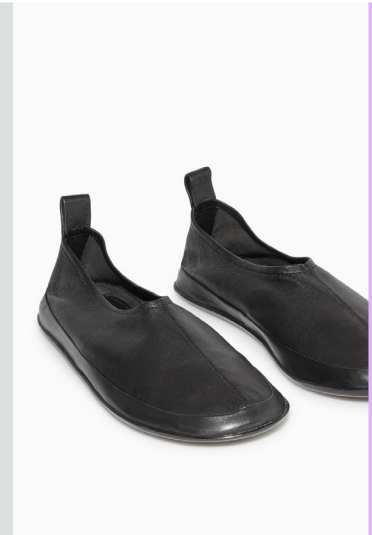
Alohas.png



arsell3.webp



Arket.jpg



Cos (2).jpg

EARLY SIGN



TEST

## THE SOFT ESSENTIAL DERBY

**+560%**  
YEAR ON YEAR



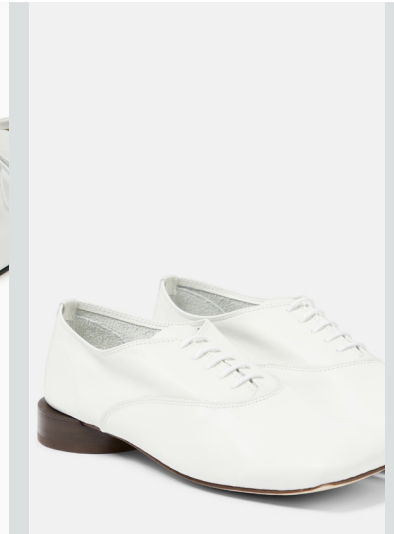
Arket (2).jpg



Hereu.webp



Armani.webp



Jacquemus x Repetto.avif



Uma Wang.webp

EARLY SIGN

# RETAIL RADAR SHOES **LOAFERS**



MANIFEST

## THE PENNY LOAFER



**+54%**  
YEAR ON YEAR



maison balzac.webp



anthropolgy-1.webp



\_sezane.avif



&othersories.jpeg



reformation-.jpeg

SAFE TREND



MANIFEST

## THE BOAT SHOE



**+50%**  
YEAR ON YEAR



Manebi.png



Zara\_6.jpg



Pull&Bears.jpg



Timberland.webp



Mango\_1.avif

SAFE TREND

# RETAIL RADAR SHOES **LOW HEELS**



INVEST

## THE BABY LOAFER



**+600%**  
YEAR ON YEAR



ped.de.biche.webp



G.H.BASS EST.1876.webp



massimo dutti.webp



churchs.avif



ganni2.webp

EARLY SIGN



INVEST

## THE RETRO BLOCK HEEL



**+36%**  
YEAR ON YEAR



Zara\_12.jpg



Vagabond (5).jpg



sezane-.avif



&OtherStories.png



Bocage.webp

SAFE TREND

# RETAIL RADAR SHOES **LOW HEELS**



MANIFEST

## THE POINTY SLING-BACK



**+37%**  
YEAR ON YEAR



Zara\_9.jpg



Mango (2).avif



Alohas\_1.png



Reformation.webp



miu miu\_1.avif

**BIG TREND**



MANIFEST

## THE SQUARED SLING-BACK



**+33%**  
YEAR ON YEAR



charleskeith 5.webp



nodelato.jpg.webp



Maje\_.webp



\_alohas4.jpg.webp



SEZANE-sling back.avif

**SAFE TREND**

# RETAIL RADAR SHOES **MEDIUM & HIGH HEELS**



TEST

## THE GRANNY PUMP



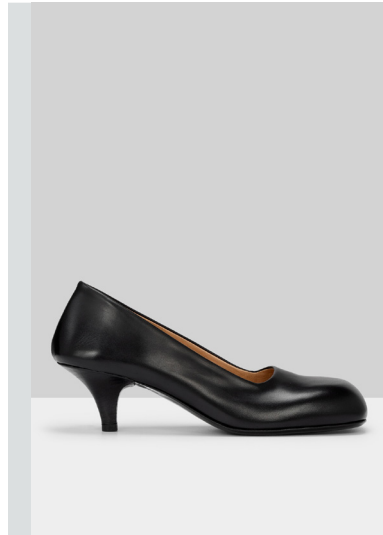
**+8%**  
YEAR ON YEAR



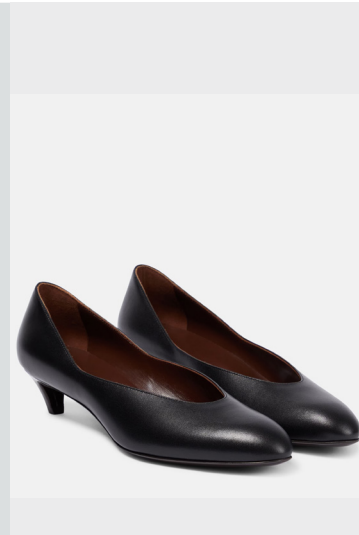
Loewe\_1.jpg



Charles & Keith.jpg



Marsell.jpg



The Row (2).avif



Bottega Veneta.jpg

SAFE TREND



TEST

## THE HEELED BALLERINA



**+114%**  
YEAR ON YEAR



miumiu.avif



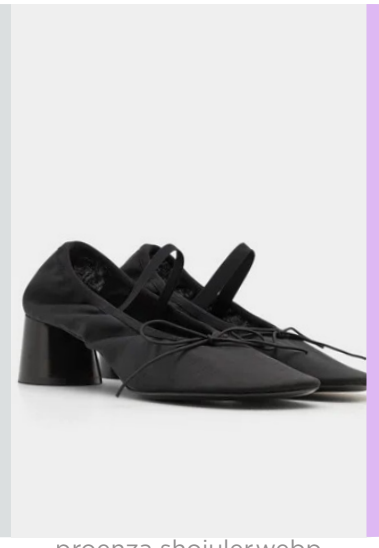
Mango (5).avif



rouje.jpeg



tory burch.png



proenza shoiuler.webp

EARLY SIGN

# RETAIL RADAR SHOES **MEDIUM & HIGH HEELS**

 **TEST**

## THE LACE-UP MULE

 **+57%**  
YEAR ON YEAR



Mango (2).avif



forloveandlemons.webp



by Malene Birger.webp



Charles Keith\_2.jpg



acne studios.jpeg

EARLY SIGN

 **TEST**

## THE SLEEK NEO MULE

 **+20%**  
YEAR ON YEAR



Charles & Keith.webp



jeffrey campbell (3).webp



Toteme.avif



Alaia.avif



Cult Gaia.webp

EARLY SIGN



# RETAIL RADAR SHOES **SANDALS**



The new season begins with the sandals strongly appearing in the footwear range. Taking 24% of the assortment, sandals remain a stable investment, even if with a slight decrease in the first spring drops, where boots and loafers are still very much in evidence. Indeed, the capricious weather still influences the performance of these early-season products. The most popular shapes include solid city sandals, revisitations of the fisherman sandal and elegant strappy styles, which lend themselves to all looks, from day to night, thanks to their sensual, feminine minimalism. We'll get back to sandal specifics in future updates, to drill down the category data.

# RETAIL RADAR SHOES SANDALS FLAT



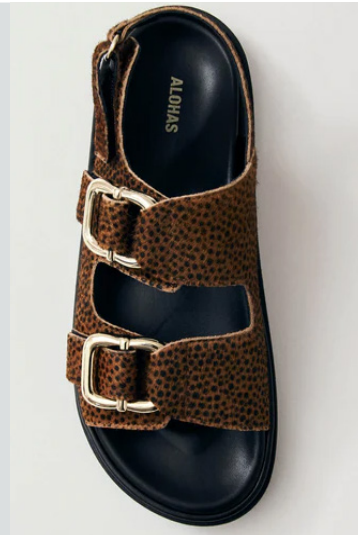
MANIFEST



jil sander.webp



bottega-veneta-2.jpg



\_alohas7.jpg.webp



chloe-.jpg



Zara-51.jpg

## THE CITY SANDAL



-9%  
YEAR ON YEAR

STABLE TREND



TEST



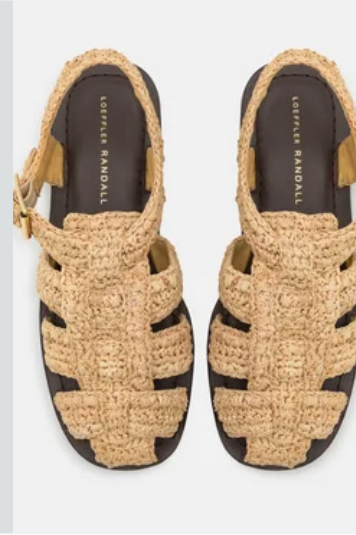
the-row.webp



mmoustache.webp



dearfrances.webp



loeffler randall2.webp



balzac.webp

## THE FISHERMAN



+32%  
YEAR ON YEAR

SAFE TREND

# RETAIL RADAR SHOES **STRAPPY SANDALS**



MANIFEST

## THE STRAPPY SANDAL



**-2%**  
YEAR ON YEAR



sezane+.avif



rivecour-.webp



mango-strappy.avif



Sandro\_SFACH01114-D238\_V\_2.webp



-jacquemus-.avif

STABLE TREND



INVEST

## THE ASYMMETRIC



**+8%**  
YEAR ON YEAR



khaite-.jpg



alhoas.png



bottega-veneta-3.jpg



jonathan-simkhai.jpg



johanna-ortiz-.jpg

STABLE TREND

# DATA SOURCES & ICONS

## TREND GROWTH



### MARKET

YEAR ON YEAR TREND GROWTH ON E-COMMERCE



### SOCIAL MEDIA

YEAR ON YEAR TREND GROWTH ON INSTAGRAM



### CONSUMER INTEREST

YEAR ON YEAR GROWTH OF ONLINE SEARCH VOLUMES



### FASHION SHOWS

YEAR ON YEAR TREND GROWTH ON FASHION SHOWS

## TREND BEHAVIOR

### EDGY TREND

weak signal of a potential micro trend with very high risk

### EARLY SIGN

emerging trend with growing perspective but higher risk

### SAFE TREND

announced trend with growing perspective and safe risk

### BIG TREND

trend with a big magnitude due to high commercial potential and quick adaption

### STABLE TREND

trend that is already present in the market with flat growth

### LAST CALL

trend with decreasing perspective but still having business potential

## TREND MAGNITUDE



### MANIFEST

AN ICONIC PRODUCT THAT IS A STABLE TREND OF LARGE MAGNITUDE WITH CONFIRMED COMMERCIAL SUCCESS



### INVEST

A CORE PRODUCT REPRESENTING A STEADILY GROWING TREND OF MODERATE MAGNITUDE WITH COMMERCIAL POTENTIAL



### TEST

A STATEMENT PRODUCT WITH GROWING PERSPECTIVE BUT SMALLER MAGNITUDE AND HIGHER RISK



## DATA TO DRIVE

01 CREATIVITY

02 STRATEGY

03 SUSTAINABILITY



LIVETREND

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