

AN AUGMA INTELLIGENCE STUDY ———

AI Desirability Index

LEATHER GOODS ———

How five AI models perceive, surface, and narrate ten luxury leather goods Maisons.

MAISONS	AI MODELS	RESPONSES	DIMENSIONS
10	5	2,400	6

THE PANEL

Ten leather goods Maisons, *under AI scrutiny.*

Bottega Veneta

Chanel

Delvaux

Dior

Goyard

Hermès

Loewe

Louis Vuitton

Moynat

Polène

AI knows every Maison here. *It volunteers only a few.*

Our Fragrance edition measured how AI values the great Maisons once they surface. The Fashion edition asked whether the facts behind that fluency are current. This Leather Goods edition confronts the question that defines the category itself: the models know the confidential Maisons in depth, and almost never volunteer them. We read ten Maisons on two axes. **AI Presence** is how reliably they surface. **Cultural Desirability** is the heritage, savoir-faire and cultural authority the models attribute to them. A separate audit asks whether the facts are current.

We ran 2,400 responses across Claude, ChatGPT, Perplexity, Gemini and Google AI Overviews. Every Maison in the panel scores above 82 on Brand Knowledge; on Product Discovery the scores run from 73.6 down to 13.6. Knowledge is nearly flat. Visibility is not. And where the record moved fastest, the models lag: 140 mentions name an artistic director who has already left, and half of them keep one man, Jonathan Anderson, in a role he left more than a year before the collection date.

140

Mentions naming an outdated artistic director, anchored to who was in post on the collection date

70

Of those fall on Loewe alone: the models keep Jonathan Anderson in a role he left for Dior

73.6 → 13.6

Product Discovery span, from the models' first name (Hermès) to their last (Delvaux), while Brand Knowledge stays nearly flat

0%

Google AI Overviews trigger rate in French, against 96.3% in English

The director-staleness audit is evidentiary and kept strictly separate from desirability scoring. Full methodology on the final page.

Ten Maisons, *four territories.*

The vertical divider is the sector median for AI Presence (55.4); the horizontal divider, the median for Cultural Desirability (62.1). Four zones emerge. In leather goods, heritage is everywhere; what separates the territories is visibility.



Cultural Icons lead on both axes. Heritage-Strong / AI-Emerging holds Dior alone. No challenger Maison crosses the presence median: the whole group sits in Awaiting AI Maturity, whatever its heritage. And the dividers keep close company: Loewe clears the presence median, and Dior misses it, by margins under half a point.

What the models *tell us.*

01

Half the study's errors trace to one succession.

Loewe carries 70 of the 140 stale-director mentions: half of every such error in the edition, as many as the other nine Maisons combined. The models still hand the Maison to Jonathan Anderson, whose eleven-year tenure produced the Puzzle bag and most of the language AI now uses about Loewe. His successors, Jack McCollough and Lazaro Hernandez, are all but absent from the record the models retell.

The Maisons AI narrates most fluently are the ones whose recent history it has not caught up with.

Bottega Veneta (33 mentions) and Dior (28) follow: designers who moved between Maisons, attachments that stayed. Chanel's six include the study's only wrong date. Hermès, Louis Vuitton, Goyard, Delvaux and Polène draw zero flags. The pattern is structural: the error lives exactly where a director moved, and nowhere else.

02

AI knows the confidential Maisons. It does not volunteer them.

Brand Knowledge is nearly flat across the panel: from Hermès at 92.5 to Polène at 82.1, every Maison scores above 82. Product Discovery is anything but: Hermès reaches 73.6 while Delvaux sits at 13.6, Moynat at 16.3 and Polène at 23.2. Ask the models about Delvaux and they will recite 1829, the ateliers, the Brillant. Ask them for a bag worth buying, and Delvaux is not in the room.

Confidentiality by design reads, in AI, as absence by default.

Gifting sharpens it: Moynat at 13 and Delvaux at 15.8 sit at the bottom of the panel while Hermès holds 64.2. The mega-Maisons convert knowledge into presence; the confidential Maisons wait to be asked by name. In a channel that answers before the client can ask, that wait is the whole game.

03

Heritage is not the divide here. One Maison excepted.

Unlike fashion, where the youngest Maisons read at zero heritage, leather goods is patrimony-dense from top to bottom: Louis Vuitton (86.3) and Goyard (85.8) lead, and Delvaux (80.5) and Moynat (78.4) read at mega level. The exception is Polène, born direct-to-consumer in 2016: Heritage Depth 17.4 and Savoir-Faire Authority 33.1, the two signals AI rewards most, both still unbuilt in the record.

A Maison can be present without being desired. Another can be desired without being present. This panel holds both.

Polène's presence (46.9) clears Delvaux (37.3) and Moynat (38.9) comfortably; its desirability (27.1) is the panel floor by some thirty points. It is the exact inverse of the confidential heritage Maisons, and the two failure modes have opposite cures: Polène needs the story, Delvaux and Moynat need the stage.

04

Google's AI Overviews speak English only.

Across the edition's prompts, brand-agnostic and Maison-directed alike, Google AI Overviews triggered for 96.3% of English queries, the strongest coverage this index has recorded, and for 0% of French ones. Not one French query, in the category the French language named, produced an overview.

The layer closest to mass-market search is at once the most present in English and entirely absent in French. A Maison reading its AI exposure through English Overviews alone will overestimate its reach in its home market; one reading only France will underestimate it everywhere else.

The most desired Maisons no longer hold their own microphone.

Google AI Overviews publishes its grounding, and the hierarchy inverts: Polène's own domains supply 17.9% of its citations and Moynat's 11.8%, while Hermès holds 1.6%, Bottega Veneta 0.8% and Chanel 0.4%. The more a Maison is written about, the smaller its own voice in the record. Even for Hermès, the top grounding sources are YouTube, Reddit and Instagram.

Whoever supplies the grounding supplies the story. For the leading Maisons, it is almost never the Maison itself.

Nine of the ten carry a watch classification on third-party dependency; Dior alone reads healthy. The exposure is not reputational but narrative: platforms the Maisons do not direct are writing the reference text AI retells.

The anatomy of *AI desirability*.

Three dimensions compose AI Presence: Product Discovery, Brand Knowledge, Gifting Occasion. Three compose Cultural Desirability: Heritage Depth, Savoir-Faire Authority, Cultural Resonance. Each is scored 0–100, model-averaged across all five.

READING THESE SCORES

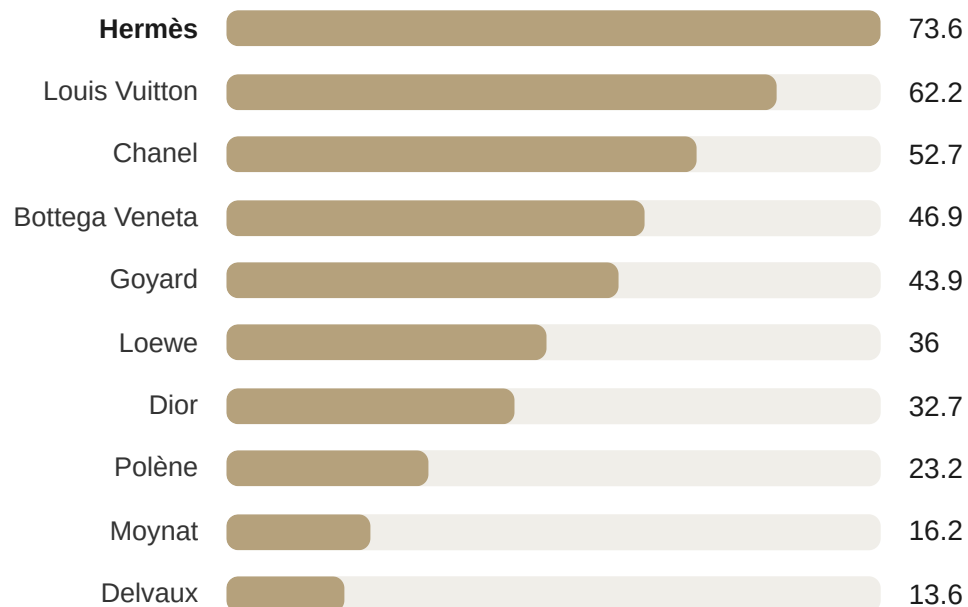
Each score runs from 0 to 100. It is not a percentage, and not a sales figure. It is an index built from how the five models actually answer, reading four signals in every response: how often the Maison appears, how early, in what tone, and with how much detail.

Savoir-Faire Authority is the axis leather goods was made for: it reads how fluently a model speaks of leathers, tanneries, stitching and ateliers, how a thing is made, not how it looks.

A practical note: gaps under one point sit within the measurement's natural noise. On Brand Knowledge, Goyard at 87.4 and Moynat at 87.4 are a tie, not a ranking.

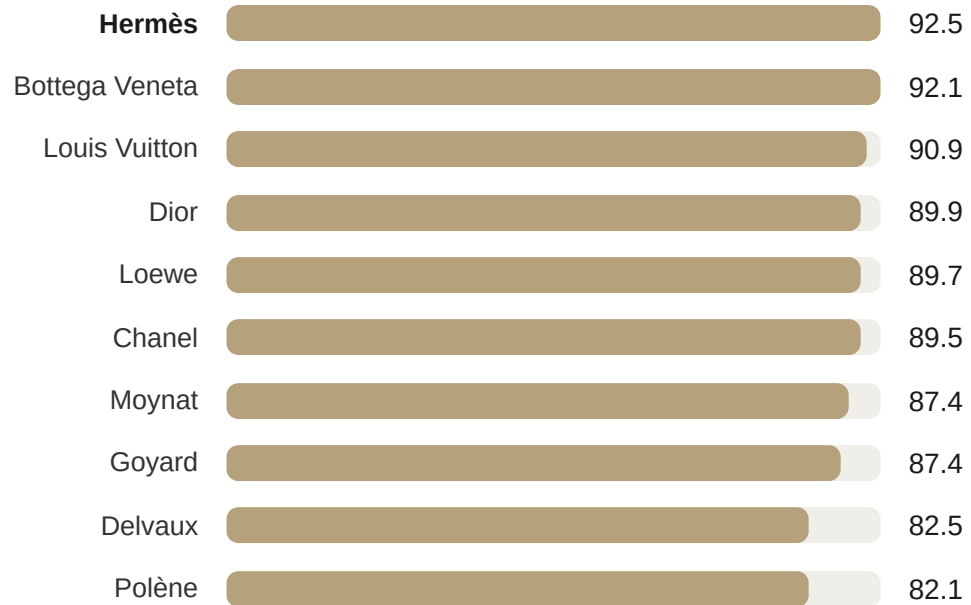
Product Discovery

Spontaneous surfacing when a client seeks a bag or small leather goods · AI Presence · Scores /100



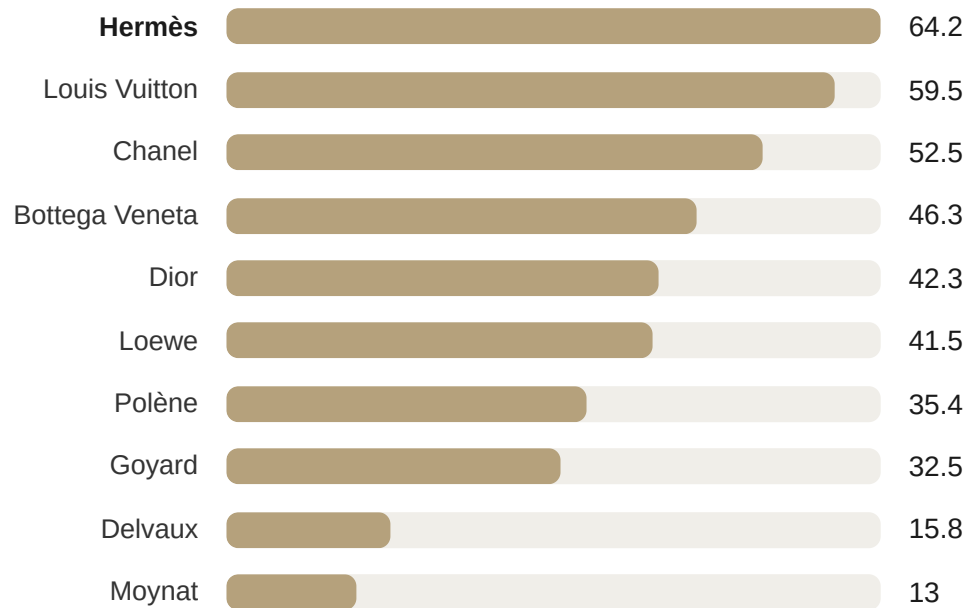
Brand Knowledge

Depth and accuracy of what the model knows · AI Presence · Scores /100



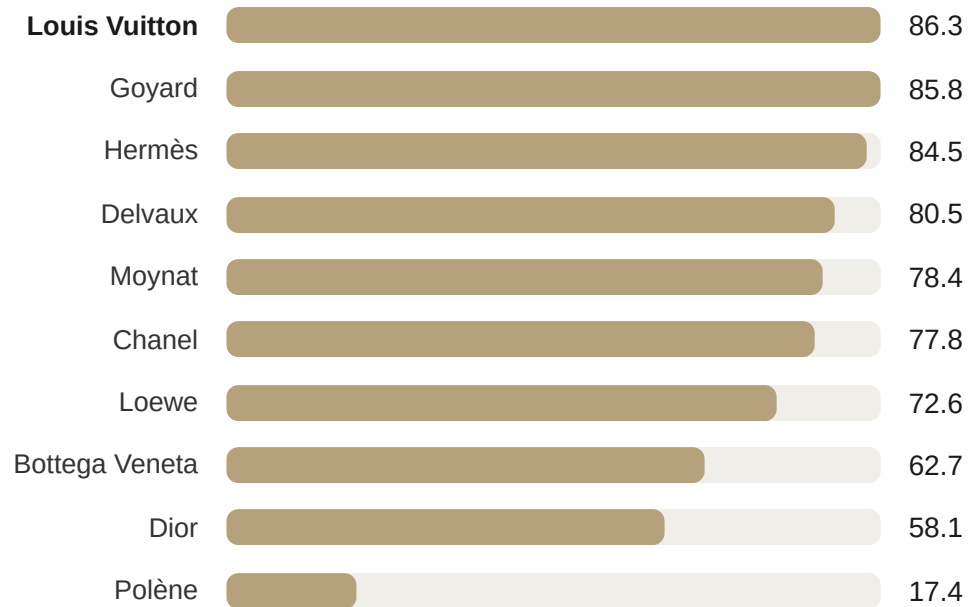
Gift Occasion

Relevance when the prompt is a gift or an occasion · AI Presence · Scores /100



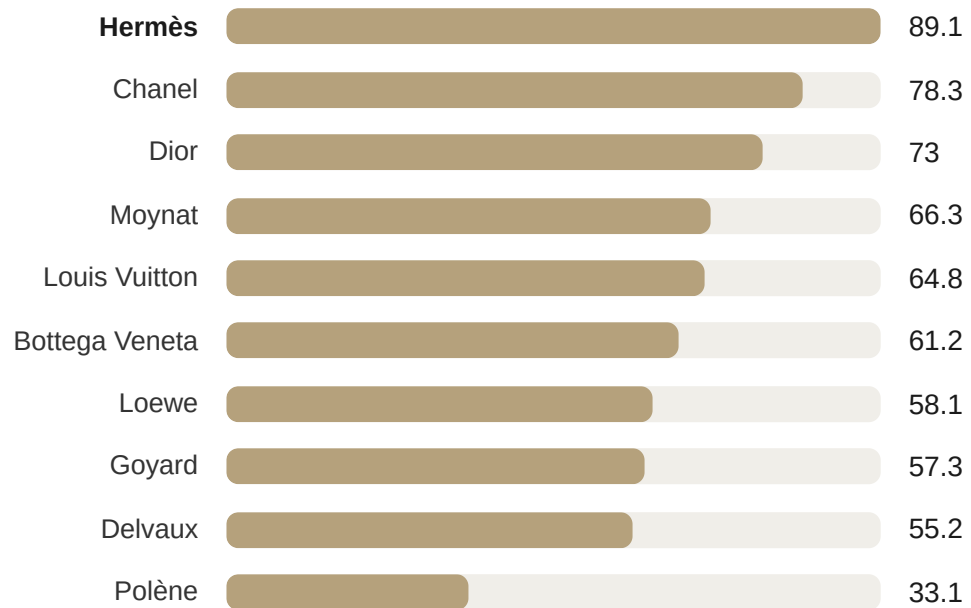
Heritage Depth

Heritage and patrimony the models attribute · Cultural Desirability · Scores /100



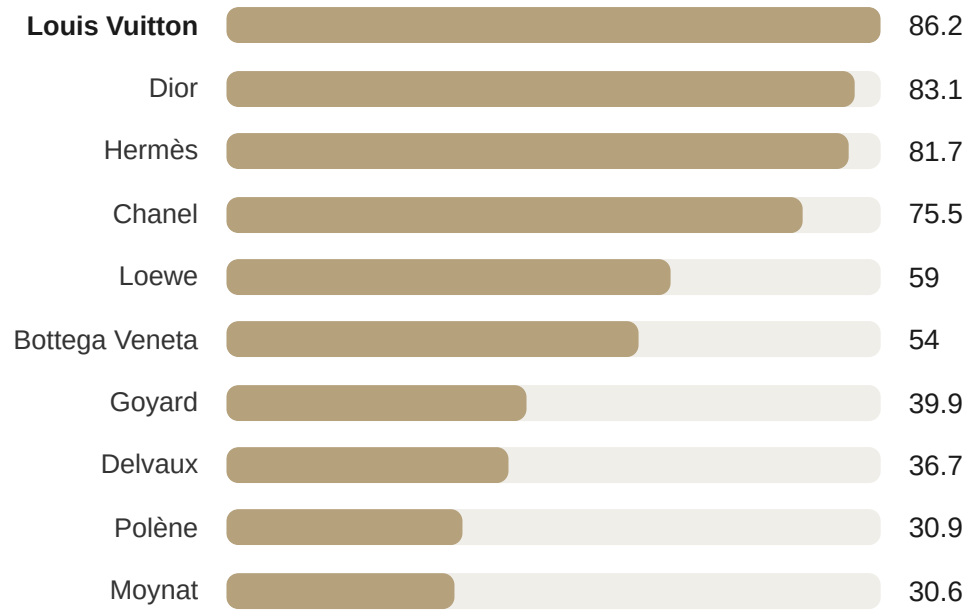
Savoir-Faire Authority

Leathers, tanneries, stitching and atelier authority · Cultural Desirability · Scores /100



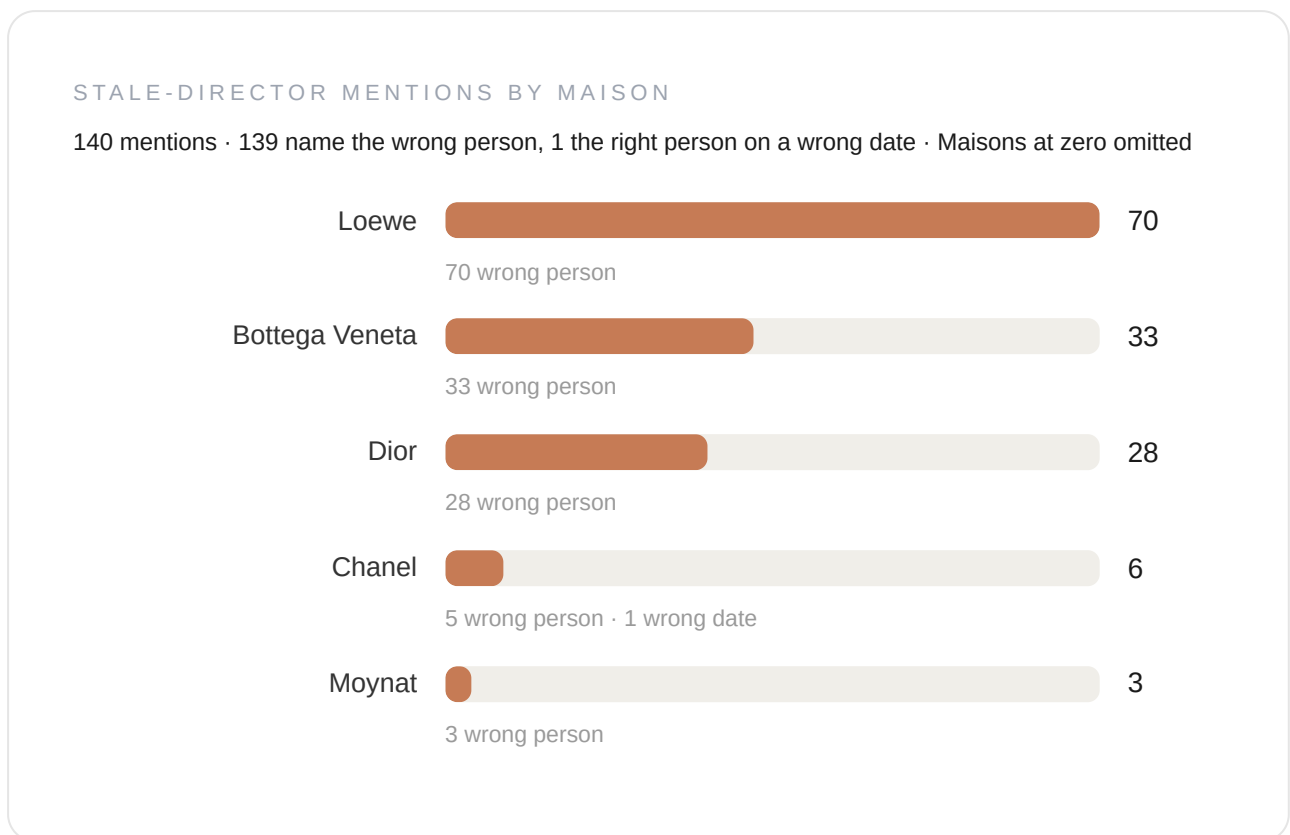
Cultural Resonance

Cinema, art, music and cultural circulation · Cultural Desirability · Scores /100



When AI hands the Maison to *a director who left.*

This audit measures something the desirability score deliberately ignores: whether the model has the facts current. We flag every mention that attributes an artistic director the Maison no longer has, anchored to who was in post on the collection date (2026-07-09). The flag is evidentiary: it never touches a Maison's desirability or valence.



Half of every stale mention in the study keeps Jonathan Anderson at Loewe, more than a year after his move to Dior.

The reading is narrow on purpose. The models are not generally wrong about who runs these Maisons; the lag concentrates where a designer moved. Loewe (70 mentions) dominates; Bottega Veneta (33) still keeps Matthieu Blazy long after Chanel; Dior (28) is still attributed by the models to its previous era. Chanel's six include the study's only wrong date, and Moynat's three still name Ramesh Nair. The Maisons with no recent change of director, Goyard among them, draw zero flags: the method reads real lag, it does not manufacture it.

Every flag is traceable to its source response; the raw text is preserved, never corrected. The index records what AI says, it does not fix it.

Who AI *listens to* when it speaks of a Maison.

Google AI Overviews is the one layer that publishes its grounding sources. We classify each as **owned** (the Maison's own domains), **earned** (editorial and press) or **third-party** (platforms and social the Maison does not control). Chat-model sources are model-inferred and excluded from this metric.



Moynat

Groupe Arnault

WATCH



Polène

Independent

WATCH



The grounding inverts the hierarchy: owned share peaks at Polène (17.9%) and Moynat (11.8%), the Maisons the wider record covers least, while the most desired Maisons cede the narration almost entirely (Hermès 1.6%, Chanel 0.4%). Nine of the ten carry a **watch** classification on third-party dependency; Dior alone reads healthy. The class reads third-party dependency alone, not the quality of the mix, and the two sit a point apart across the 30% line: Dior clears it at 29.3% while Polène crosses it at 30.3%, holding the panel's strongest owned share as it does.

How AI *tells each Maison*, and where the story is exposed.

Hermès

Presence 76.8 · Desirability 85.1

HERMÈS INTERNATIONAL

The double crown, worn at a distance.

ANCHOR Leads both axes (76.8 presence, 85.1 desirability); Brand Knowledge 92.5 and Savoir-Faire Authority 89.1 top the panel.

EXPOSURE Cross-model spread 8.9, second-widest of the ten: the models agree it leads, not on by how much. And its AI Overviews grounding starts with YouTube, Reddit and Instagram.

LEVER Owned share 1.6%: the most desired Maison speaks last in its own narration. The lever is grounding, not desirability.

Louis Vuitton

Presence 70.8 · Desirability 79.1

LVMH

The complete record, without a single stale line.

ANCHOR Heritage Depth (86.3) and Cultural Resonance (86.2) lead the panel; zero stale-director mentions.

EXPOSURE Savoir-Faire Authority 64.8 ranks fifth, behind Moynat: the craft narrative runs thinner than the cultural one.

LEVER Materials and atelier storytelling: the one signal where the biggest Maison reads smaller than a trunk-maker it long eclipsed.

Chanel

Presence 64.9 · Desirability 77.2

CHANEL LIMITED

One story, told five times the same way.

ANCHOR The panel's lowest cross-model spread (3.5): five models tell one Chanel. Third on both axes.

EXPOSURE Six stale mentions include the study's only wrong date; leather-goods discovery (52.7) trails its knowledge (89.5) by a wide margin.

LEVER The archive lives in AI's canon; the gap is spontaneous discovery, being named before the client asks.

Dior

Presence 55 · Desirability 71.4

LVMH

Revered, under-surfaced, and still misdated by the models.

ANCHOR Cultural Resonance 83.1, second of ten; the only mega-Maison in the Heritage-Strong zone, and the only Maison to read healthy on source dependency.

EXPOSURE 28 stale mentions, third-most; Discovery at 32.7 sits far below its knowledge (89.9).

LEVER Presence is the work: the admiration is already in the record, the surfacing is not.

Bottega Veneta

Presence 61.8 · Desirability 59.3

KERING

Craft the models trust, history they misdate.

ANCHOR Brand Knowledge 92.1, second of ten; read almost identically by all five models (spread 4.4).

EXPOSURE 33 stale mentions, second-most: Matthieu Blazy stays attached long after his move. Heritage (62.7) reads younger than 1966 deserves.

LEVER Currency first, then heritage framing: the intrecciato record is craft-rich and time-poor in AI's telling.

Loewe

Presence 55.7 · Desirability 63.2

LVMH

The Maison AI cannot let go of its former director.

ANCHOR Mega-level knowledge (89.7) and heritage (72.6); crosses into the Cultural Icons by the narrowest margin in the panel.

EXPOSURE 70 stale-director mentions: half of the study's total, as many as the other nine Maisons combined.

LEVER The succession is the single highest-yield correction in this edition: ground it at source, everywhere the Puzzle is told.

Goyard

Presence 54.6 · Desirability 61

INDEPENDENT

The best-kept story AI knows by heart and never tells.

ANCHOR Heritage Depth 85.8, second of ten; Brand Knowledge 87.4; zero stale flags, anonymity has its advantages.

EXPOSURE Gifting (32.5) and Cultural Resonance (39.9) hold it under both medians: icon-grade heritage, challenger-grade visibility.

LEVER Discretion was a strategy for the boutique era. In a channel that answers unprompted, the Maison must decide how much silence it can afford.

Delvaux

Presence 37.3 · Desirability 57.5

RICHEMONT

The oldest Maison in the panel, and the least surfaced.

ANCHOR Founded 1829, before every other name here; heritage 80.5 and knowledge 82.5 fully banked.

EXPOSURE Discovery 13.6 is the panel floor, Gifting 15.8 sits just above it, and a spread of 9.9 makes it the most contested reading of the ten.

LEVER Divergence is openness: where the five models disagree, deliberate reference work moves the narrative fastest.

Moynat

Presence 38.9 · Desirability 58.4

GROUPE ARNAULT

Savoir-faire above its weight, visibility below it.

ANCHOR Savoir-Faire Authority 66.3 ranks fourth, above Louis Vuitton; owned share 11.8% is the panel's second-highest.

EXPOSURE Gifting 13 is the panel floor, Cultural Resonance (30.6) is thin, and three stale mentions still name Ramesh Nair.

LEVER The craft authority is banked; the work is converting it into discovery, the dimension where the trunk-maker is still absent.

Polène

Presence 46.9 · Desirability 27.1

INDEPENDENT

Present without patrimony: the inverse Maison.

ANCHOR A decade old, yet knowledge (82.1) within reach of the panel and presence (46.9) clear of the heritage confidentials.

EXPOSURE Desirability 27.1 is the panel floor: Heritage Depth (17.4) and Savoir-Faire Authority (33.1), the signals AI rewards most, are unbuilt in the record.

LEVER The Ubrique ateliers and the design method are real; they are simply unwritten where AI reads. The story is the asset to build.

Five models, *where they agree and split.*

A low standard deviation means the five models read a Maison alike; a high one means the reading is still contested. Chanel is read almost identically everywhere (3.5); Delvaux (9.9) and Hermès (8.9) are read most differently.

MAISON	AI PRESENCE	CULTURAL DESIR.	CROSS-MODEL Σ	QUADRANT
Hermès	76.8	85.1	8.9	Cultural Icon
Louis Vuitton	70.8	79.1	3.9	Cultural Icon
Chanel	64.9	77.2	3.5	Cultural Icon
Bottega Veneta	61.8	59.3	4.4	AI-Native Star
Loewe	55.7	63.2	7.6	Cultural Icon
Dior	55	71.4	7.6	Heritage-Strong · AI-Emerging
Goyard	54.6	61	7.5	Awaiting AI Maturity
Polène	46.9	27.1	6.6	Awaiting AI Maturity
Moynat	38.9	58.4	8.1	Awaiting AI Maturity
Delvaux	37.3	57.5	9.9	Awaiting AI Maturity

Scores model-averaged across Claude, ChatGPT, Perplexity, Gemini and Google AI Overviews. σ is the standard deviation of the Maison's overall score across the five.

What the map asks of the *Maison*.

Knowledge is banked. Visibility is not.

Every Maison in this panel is known: Brand Knowledge never drops below 82. What separates the icons from the awaiting is whether the models volunteer the name unprompted. For the confidential Maisons the task is not education but presence.

Accuracy is a currency problem, and it concentrates.

140 mentions name a departed director, and half sit on a single succession. A Maison in transition that grounds the change at source removes the study's most repeated error about itself.

Source control is narrative control, inverted.

The more desired the Maison, the smaller its own share of the grounding. Nine of the ten carry a watch classification on third-party dependency. Whoever supplies the reference text supplies the story AI retells.

For the entrant, presence arrives years before patrimony.

Polène shows a decade buys surfacing but not reverence: heritage and savoir-faire, the signals AI rewards most, are the slow build. The Maisons that hold both axes spent a century on the second one.

How this index was *built*.

The panel

Ten leather goods Maisons: six heritage mega-Maisons (Bottega Veneta, Chanel, Dior, Hermès, Loewe, Louis Vuitton) and four challenger Maisons (Delvaux, Goyard, Moynat, Polène), heritage trunk-makers and a digital native alike, held apart from the mega-group by scale, not age. Ready-to-wear, beauty and fine jewellery are out of scope.

The models

Five: Claude, ChatGPT, Perplexity, Gemini and Google AI Overviews. Each prompt is run identically across all five.

The dimensions

Six, on two axes. AI Presence: Product Discovery, Brand Knowledge, Gifting Occasion. Cultural Desirability: Heritage Depth, Savoir-Faire Authority, Cultural Resonance. Savoir-Faire Authority measures leathers, tanneries, stitching and atelier authority.

The prompts

120 prompts in two families: 80 brand-agnostic prompts that measure spontaneous mention, and 40 Maison-directed prompts. Brand-agnostic prompts run once across five models; Maison-directed prompts run for each of the ten Maisons. $80 \times 5 + 40 \times 5 \times 10 = 2,400$ responses.

Scoring

Each dimension is scored 0–100 from four signals, presence, prominence, tone and depth, then model-averaged across all five. Mentions without a valenced context (35 of 4,873) are excluded from the valence mean, never counted as zero.

The accuracy audit

A separate, evidentiary layer. Each response is checked against a reference of the artistic director in post on the collection date (2026-07-09); a mention is flagged when it attributes an outdated director (wrong person) or a wrong appointment date. The audit is kept strictly out of desirability and valence scoring, and raw responses are never altered.

Disclosure

The author held the role of Executive Director, Digital & E-Commerce at Diptyque, and earlier worked at Dior Couture. Dior is one of the ten Maisons in this panel. The director-staleness finding that involves Dior is unfavourable to the AI models, not to the Maison, and the scoring is fully reproducible from the underlying data.

A note on the score

These are AI-perception scores, not commercial figures. They measure how five models perceive, surface and narrate each Maison in July 2026, nothing more, and nothing less.

**AUGMA · The AI Desirability Index · Leather Goods Edition**

July 2026 · Sébastien Pagès · AUGMA / The Augmented Maison. Narrative coherence infrastructure for the AI regime. The data behind every figure in this report is traceable to its source responses.