

NEW CODES OF LUXURY

Aspirational Shifts in North America

September 2023



New Codes Of Luxury: From Fixed To Flexible

The world of luxury has been upended. Culture is shifting toward a growing resentment of not just the wealthy but of how their wealth is obtained. Driving this shift are factors like the [lingering effects of inflation](#), the growing gap between worker pay and executive pay, highly publicized fights for fairness and equity – from Occupy Wall Street to the more recent strikes in Hollywood – and the [rather unsympathetic response](#) to the recent Ocean Gate submarine disaster that was rooted in schadenfreude, rather than sympathy.

Our [Inflation Nation report](#) highlights that a key component of the American Dream is no longer attainable for many: the promise that each generation will fare better than their parents. As a result, people have shifted how they view and value luxury. With this in mind, we set out to uncover what a broad cut of the North American population considers aspirational in 2023, and what luxury means to those who will likely never reach the wealth of today's 1% or even 10%.

METHODOLOGY

Horizon Media and Horizon Media Canada joined forces to better understand:

- How do people define luxury? Which attributes do they associate with Traditional Luxury and which do they associate with Contemporary Luxury?
- How do people define luxury for themselves in their personal lives? Is this different from how luxury is defined more broadly?
- How are people defining new standards of luxury and aspiration?
- Which attributes of luxury matter within each business sector?

To explore these questions fully, we used a variety of approaches: Desk research, a robust audit of luxury cultural signals across business sectors, a semiotic analysis of luxury “codes” and aesthetics and a proprietary study of 2,000 adults 18+ in the US and Canada (English and French).

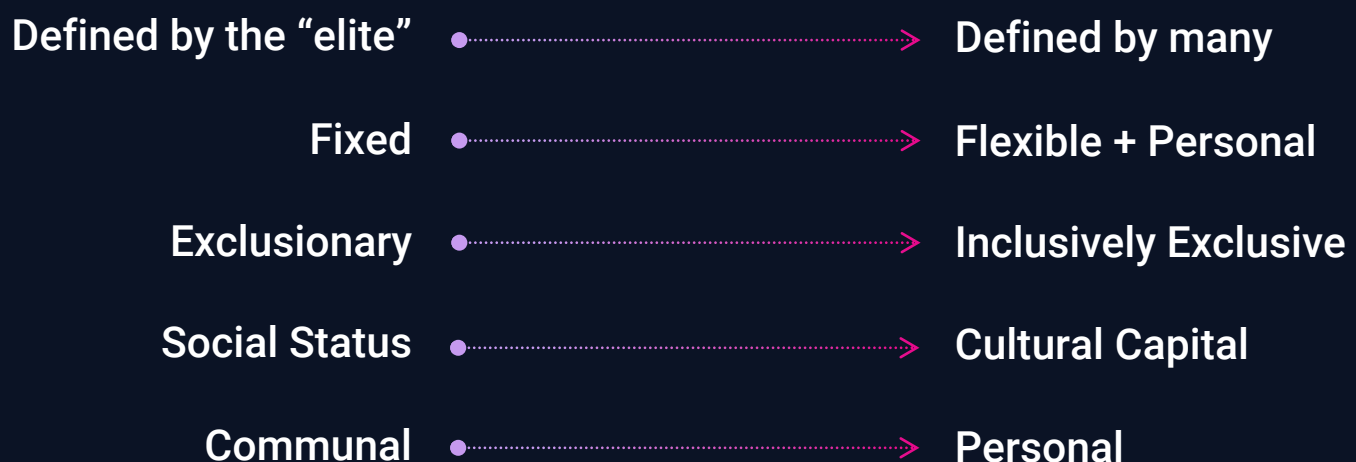
Executive Summary

Until recently, luxury has been bimodal. The first mode: **Traditional Luxury**, rooted in opulence and exclusivity — think tony enclaves, expensive jewelry, golf club memberships and Italian sportscars. The second mode: **Contemporary Luxury**, which reflects modern values that favor innovation and sustainability — think Apple, Tesla, Goop, Peloton, and Airbnb. Both Traditional and Contemporary Luxury have been defined by the producers of luxury brands and experiences for the small circle of affluent people who buy them.

Given recent cultural shifts, we now have a third mode: **Personal Luxury**. Personal Luxury is defined by the individual, not brands, in the context of their own aspirations, financial circumstances, life stage and social world. Personal Luxury expands the definition of luxury to accommodate a wider range of perspectives. By making luxury more personal, it becomes more accessible and gives more people permission to participate.

This reflects a broader societal move towards inclusivity, individuality, and a deeper connection with personal values. It's a reflection of how the meaning of luxury has become more nuanced and adaptable, acknowledging that different people find luxury in different ways.

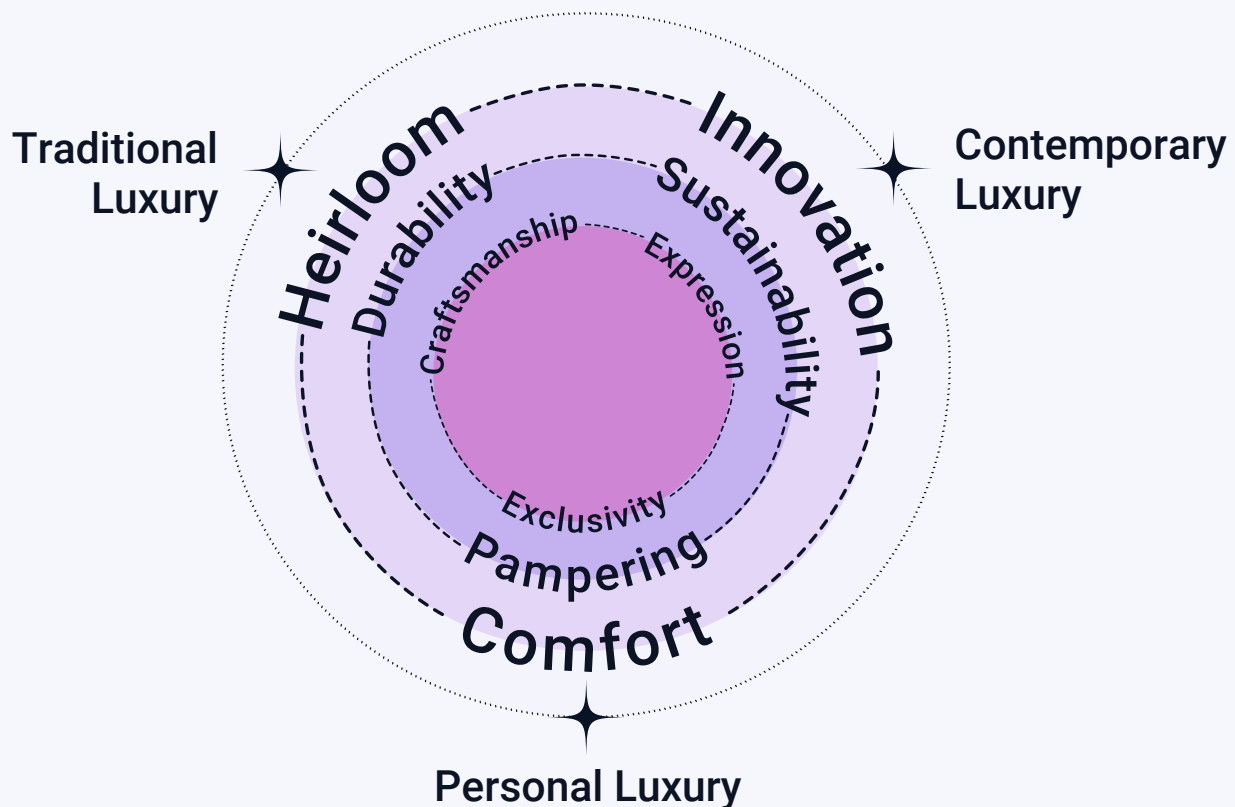
Cultural Shifts



Executive Summary

Personal Luxury does not replace Contemporary Luxury, just as Contemporary Luxury has not replaced Traditional Luxury. The three coexist, available for different audiences at different times. However, each mode of luxury prioritizes different attributes.

To create a list of luxury attributes* we conducted an extensive audit of brands, media, and experiences to decode their qualities. We then surveyed 2,000 adults 18+ in the US and Canada to ask them which attributes they associate with Traditional Luxury and which they associate with Contemporary Luxury. Next, we asked people which attributes matter most when thinking about luxury in their own lives. Below is a snapshot of their top answers.



Brands looking to engage people in their individual worlds of Personal Luxury will require intimate knowledge of people's beliefs and aspirations and a nuanced understanding of how culture and media are both influencing and reflecting their ever-evolving definition of luxury.

Read on for more detailed findings and brand implications. For customized applications and consulting contact us at askwhy@horizonmedia.com.

**See appendix for full list + definitions*

How We Got Here:

[TRADITIONAL LUXURY]

[CONTEMPORARY LUXURY]

[PERSONAL LUXURY]

FIXED

The idea of luxury is as old as ancient civilization – even burial rituals with prized possessions signaled a status and promise for transient life beyond the grave.



Antiquity

The birth of modern luxury brands – a symbol of high fashion resulting from early-stage globalism.



1850-1950s

Prohibition speakeasies become exclusive "insider" places to partake of the forbidden fruits of alcohol.



1920s

A more intimate view of the rich and famous family, *Keeping Up with the Kardashians* will go on for 20 seasons.



2007

Docuseries *Rich Kids of Beverly Hills* showcases how kids of wealthy, and sometimes famous, parents spend their time.



2014

Covid results in the loss of everyday luxuries and conveniences, shifting our values around what matters most. The wealthy go incognito to avoid scrutiny.



2020

Alternative assets and investments like NFTs get heavy market attention, but adoption is slow.



2022

People side with striking writers and actors in their fight against "corporate greed."



2023

FLEXIBLE



Purple is considered a royal color, an upper-crust symbol due to its innovative and difficult extraction from snails. King Cyrus of Persia and Roman Emperors forbade commoners from wearing.

Byzantine Empire



This scene from *Titanic* depicts old money vs. new money – the idea of status as a legacy club one's born into.

Early 1900s



Reality TV series *Lifestyles of the Rich and Famous* chronicles the everyday extravagance of athletes, socialites, and entertainers.

1984-1995



The launch and growth of Instagram allows everyone to put their wealth and aspirations on full display.

2010



Inflation follows Covid leading to wallet lockdown for the masses and a resurgence of stealth wealth among the affluent.

2021



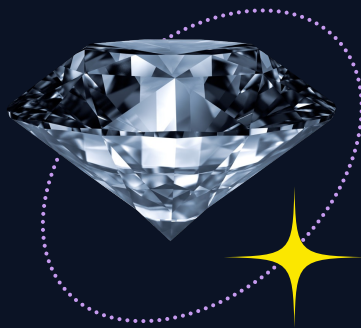
Popular TV and film (e.g. *White Lotus*, *Succession*) portray the wealthy as highly unlikeable, fueling an "eat the rich" narrative among the masses.

2023



Harvard pushes to end Legacy Admissions in the wake of the end of affirmative action.

2023



Traditional Luxury

By the few, for the few

Traditional Luxury is Legacy

Traditional Luxury is very much alive. The idea that luxury is an investment – something that holds its value over time, and from generation to generation – is important to many, but particularly Boomers. For Boomers, whose wealth is undergoing a transfer to Gen X and Millennials, attributes such as heirlooms, craftsmanship and durability may be seen as essential because the item is not just bought with themselves in mind, but with their children, grandchildren and legacy in mind.

The products that meet this criteria likely come with a high price tag, making them feel more exclusive – think: a house, a watch, jewelry or designer handbags.

\$84T

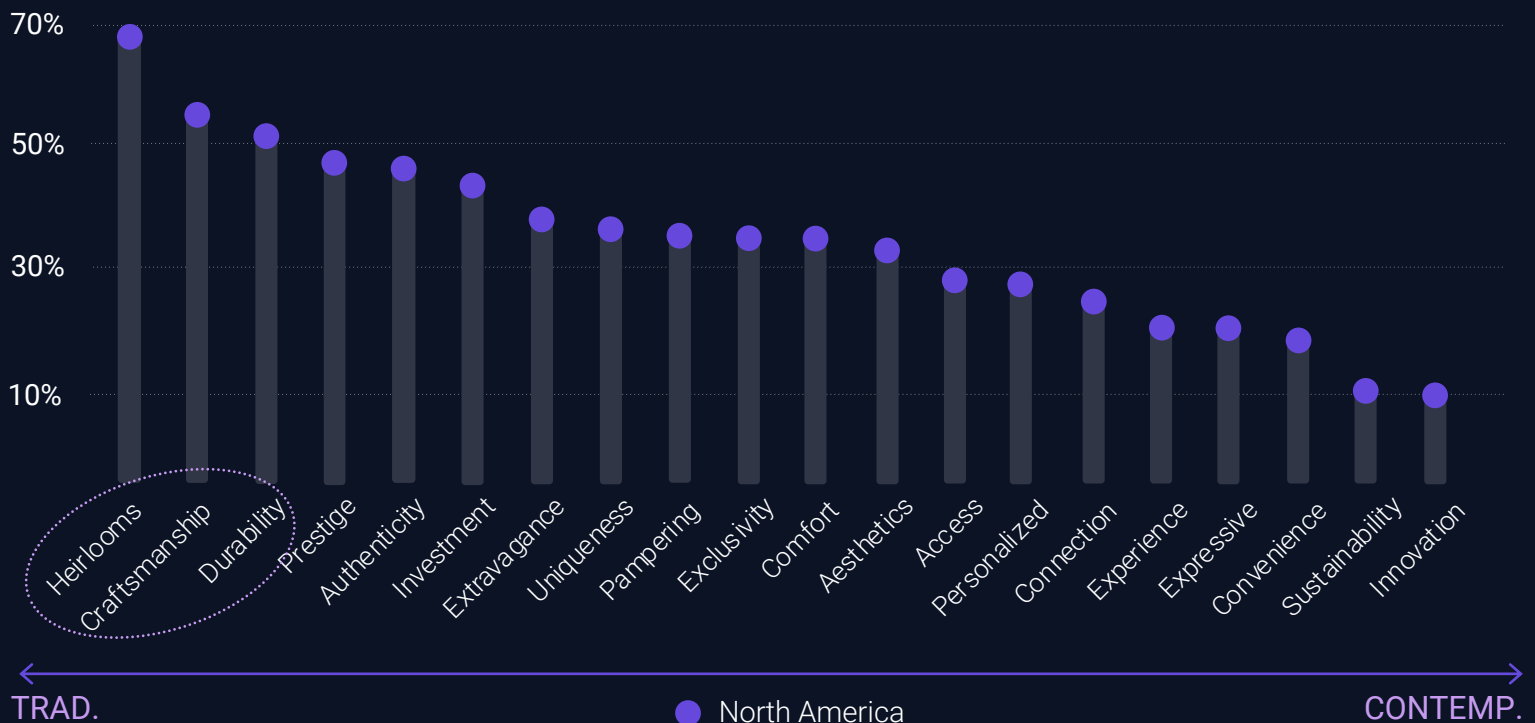
in assets will be handed down to Millennials and Gen X between 2023 and 2045.

Source: [TheStreet](#)



The chart below shows the rank order of attributes associated with Traditional Luxury. Boomers over index (+6pts) on seeing heirlooms as synonymous with Traditional Luxury.

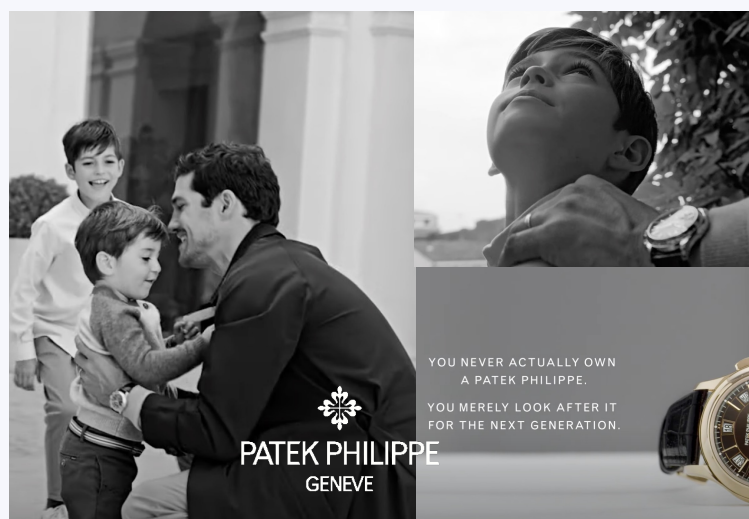
Traditional Luxury Associations



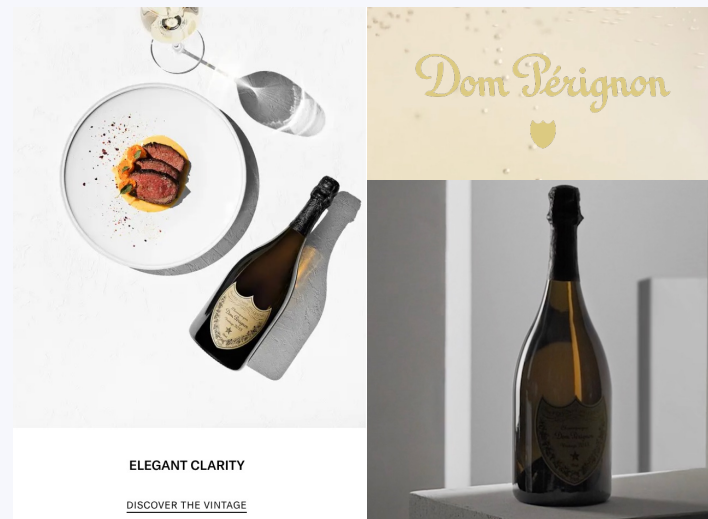
Communication Codes: Traditional Luxury

We explored how the top three attributes of Traditional Luxury — heirlooms, craftsmanship, and durability — are exhibited in the visual and written language of brand identities.

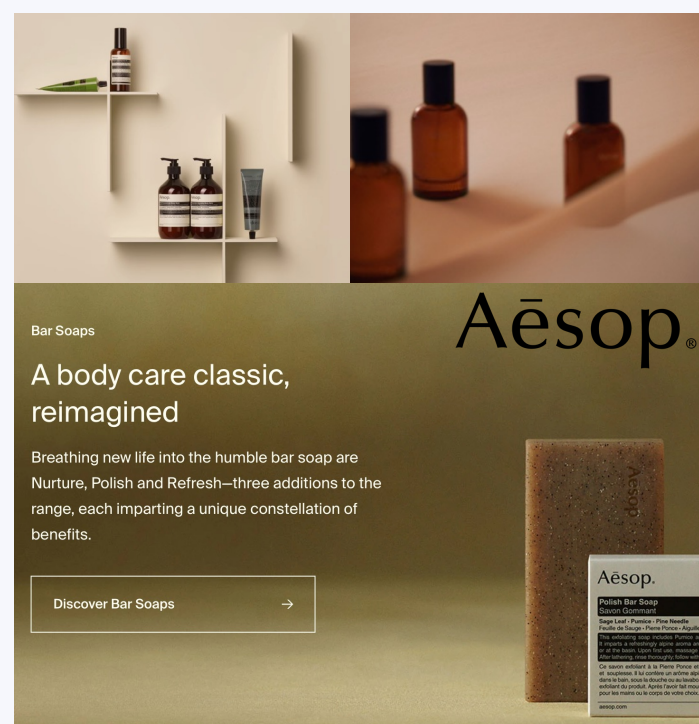
Traditional Luxury codes are often conveyed through muted, neutral color palettes and a minimal aesthetic that help identify a brand as timeless, not trendy; quiet, not loud. Storytelling often focuses on themes of craft and longevity, with language that details the brand's commitment to quality and, in many cases, an established heritage.



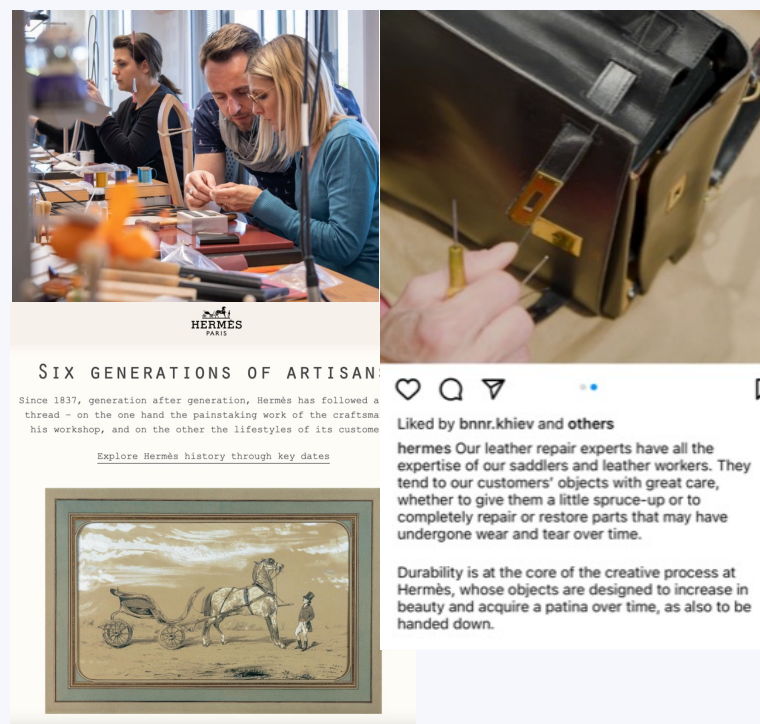
[Patek Philippe's](#) "Generation" ads having been running since 1996.



[Dom Perignon's](#) visual minimalism emphasizes the value of its sparse product line.



[Aesop](#) uses skillful branding and visuals to imbue everyday products with grandeur.



[Hermes](#) emphasizes its commitment to craft and resulting durability across channels.

Traditional Luxury Isn't Dead, But Social Media's Spotlight Is Changing Perceptions

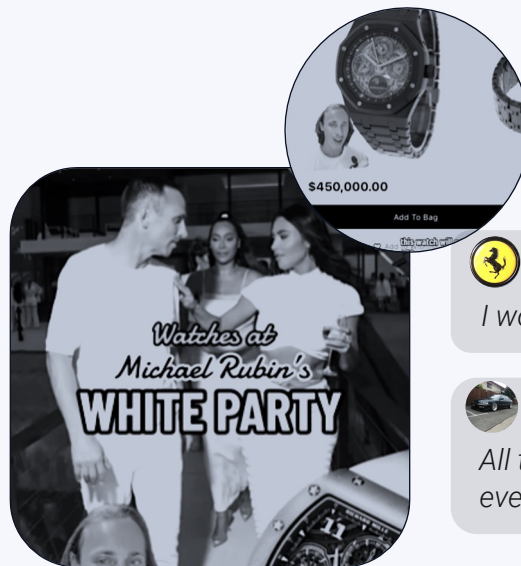
Though Traditional Luxury has retained relevance, the cultural expressions around it are changing. Top-down luxury is being scrutinized by bottom-up social exposure, shining a different kind of spotlight on the brands and the people who buy them and removing the “stealth” from “stealth wealth.”

TikTok videos may highlight luxury goods like high-end watches (with their colossal price tags) in a neutral tone, but the reactive commentary is far from impartial. This social content that “exposes” celebs for their lavish purchases stands in stark juxtaposition with the practical needs and personal values of most viewers.

Even for brands pulling up the drawbridge to remain more aspirational than accessible, like Chanel creating invite-only boutiques for their top-tier customers, the watchful eye of social media mavens will make this elitism difficult to maintain.

This video, with 265k views, shows the watches worn by celebs at the infamous Michael Rubin White Party in the Hamptons. Prices range from \$100k to \$7 Million.

Source: [IG/@ItsChadAlexander](https://www.instagram.com/ItsChadAlexander)



Scottfromscotland_

I would avoid this party like the plague.



automotiveanatomy

All these people gather around and laugh how everyday people bought them those watches.

In addition to raising prices, Chanel is opening private boutiques to insulate their existing shoppers by separating the spenders from browsers and tourists.

Source: [High Snobiety](https://www.highsnobiety.com)



chefcarolewendling

Just another way to get rid of your average gal who saves a year to buy a bag. Those days are gone 😞. They're silently saying that they would only like to cater to the 2%.



Romi_I_h

They are raising the prices but are lowering the quality and have bad customer service. It's a sad thing.



Contemporary Luxury

By the few, for the many

Contemporary Luxury Is Both Younger And Future-Facing

Three in four people agree the definition of luxury is changing. But how? Innovation and sustainability are far and away the top two attributes defining Contemporary Luxury. With governments and corporations making commitments in both areas, the idea of luxury is shifting to products and experiences that are future-facing. Using the latest technologies and working to preserve the future of the planet are defining characteristics that are a clear pivot from the way luxury has traditionally been defined.

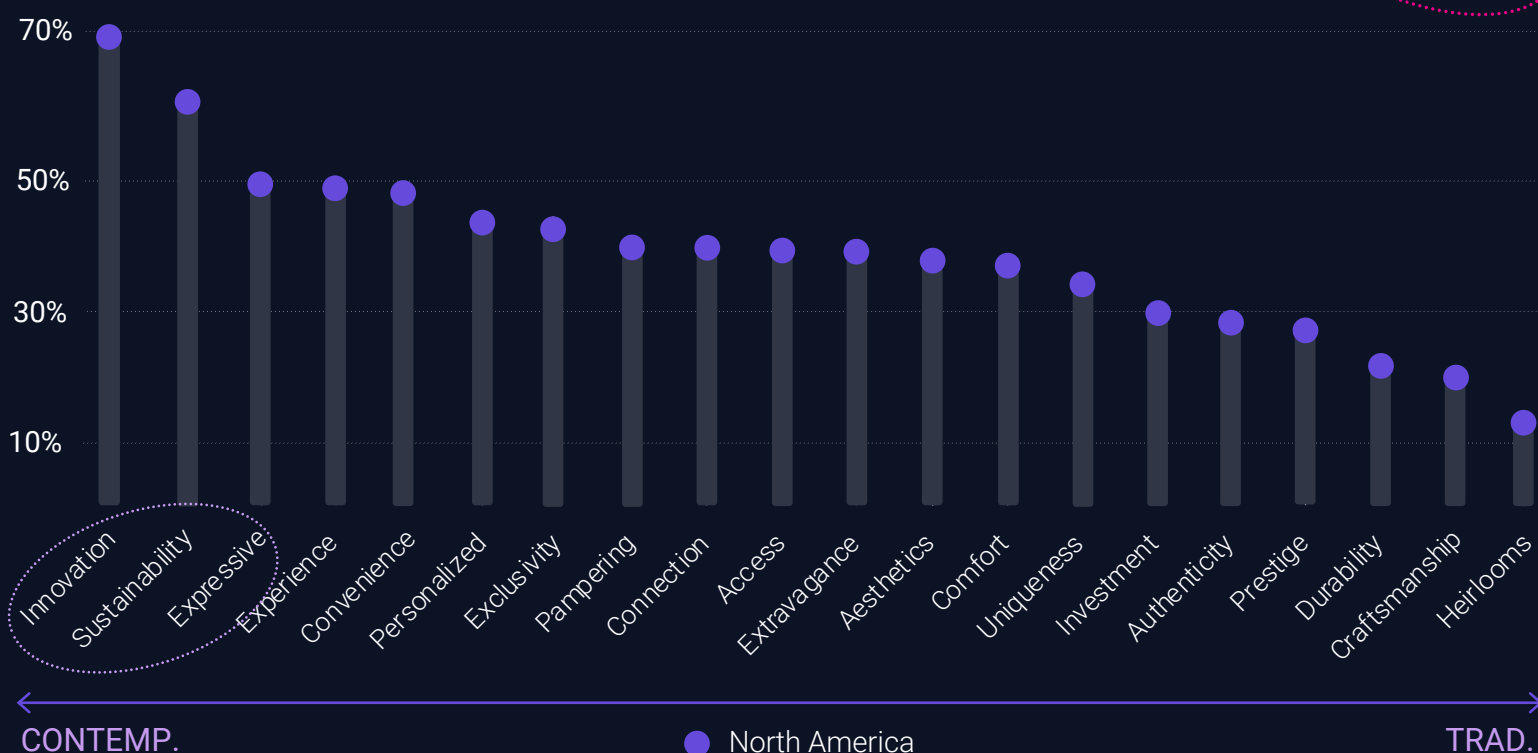
The idea of expressiveness as a marker of Contemporary Luxury is also compelling. While Traditional Luxury emphasizes fitting in and adhering to certain unspoken codes, North America has shifted to an identity-first culture. For younger people who are more fluid in their identities and who use social channels as creative platforms, personal expression has become a rebellion against the conformity inherent in Traditional Luxury.

60%

of Millennials say they'll pay a premium for a product with the latest technology.



Contemporary Luxury Associations



Communication Codes: Contemporary Luxury

We explored how the top three attributes of Contemporary Luxury — innovation, sustainability, and expressiveness — are exhibited in the visual and written language of brand identities.

Contemporary Luxury codes are often communicated through a flexible range of colors, aesthetics, and materials reflective of modern values — including metallics and holographic shades resonant of digitally-created visuals. With messaging that looks to the future, the storytelling of these brands emphasizes originality and embraces the continued transformation of today's global culture.



Drivers are [personalizing their sustainable rides](#) in an expressive fashion.



[Cactus leather brand Desserto](#) is supplying brands with an innovative, high-quality leather alternative.

AN EVOLUTIONARY APPROACH THAT EMBRACES THE FUTURE OF WATCH COLLECTING

Like you, we were tired of the stiffness of traditional luxury retail. After all: purchasing a new watch should be a luxury experience in itself — something more than a mere transaction. We strive to give our buyers this experience through complete transparency, free access to education, and an unrivalled community of fellow collectors.



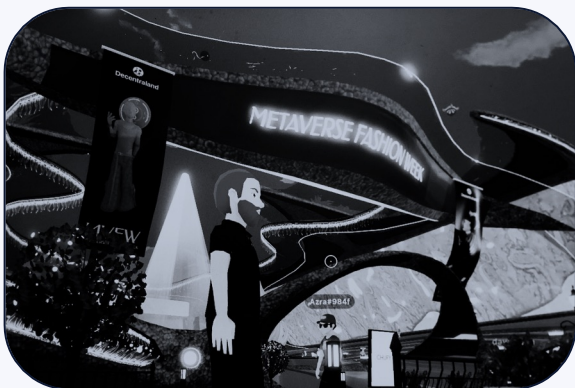
[AI-powered WristCheck](#) aims to make the luxury secondhand watch world more accessible and transparent.



Coach's 2022 [Courage To Be Real](#) campaign collaborated with boundary-breaking rapper Lil Nas X to promote personal expression

Contemporary Luxury Reflects Modern Values

Innovation, sustainability, and expressiveness are brass tacks when it comes to luxury today. This mindset both shapes and reflects the cultural signals emerging across categories. Contemporary Luxury leverages innovative technologies to help achieve sustainability goals — and brands that embrace self-expression in addition to innovation and sustainability will be doubly rewarded. These preeminent values have led to innovations in the luxury market.



NFSHE uses NFTs to authenticate luxury goods in the 'real' world and beyond. NFSHE was created by luxury industry vet Eliza Lesser, who believes NFTs and blockchain technology will soon be essential components of authenticating tangible luxury products — especially since certificates are easy to forge.

Source: [Decentral](#)



In March, Telfar's live sale flipped the pricing process on its head, allowing customers to decide the price: the greater the interest, the lower the cost. By innovating the sales process that matches supply and demand, the brand curbed unnecessary waste.

Source: [Afrotech](#), Image: [The Cut](#)



Nike released San Francisco-Chinese heritage sneakers during AAPI heritage month. The Nike Dunk High' Gold Mountain' sneakers feature Mandarin words "Gau Gum Saan" — turning an 1860s migration mantra into a modern form of cultural expression.

Source: [Sole Collector](#)



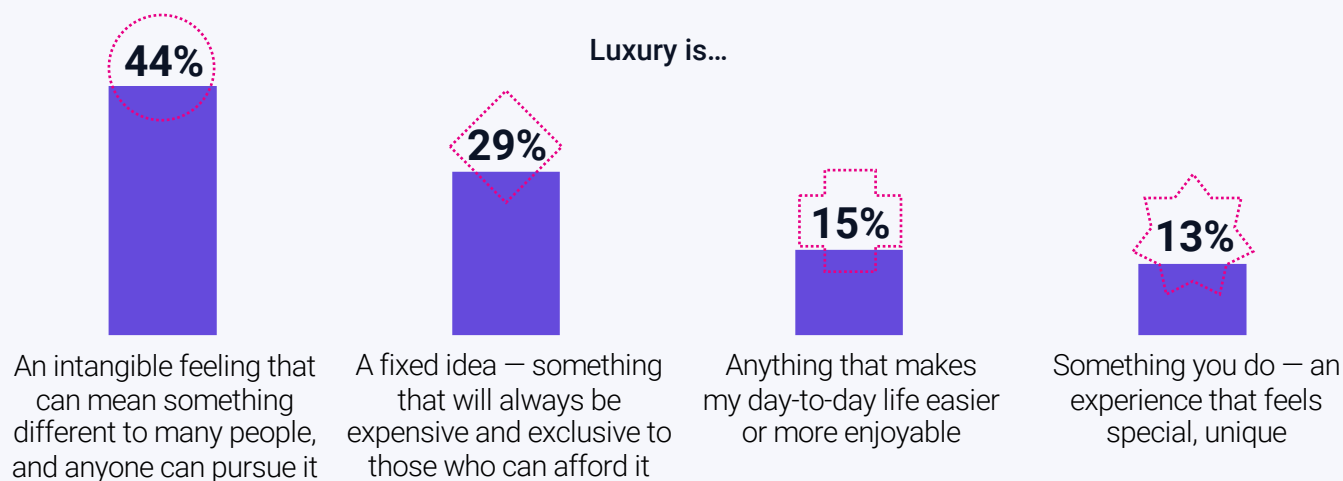
New Luxury is Personalized

Defined by me, for me

Luxury Is Highly Personal — And Anyone Can Pursue It

While more people (66%) see luxury as a rare indulgence, one in three (34%) people believe luxury is something you do for yourself every day. This is even more true (+7pts) in the US among multicultural audiences who may have historically felt the most excluded from luxury.

These “everyday indulgers” are looking to turn any minute into a special moment, no matter the occasion. It’s a rebellion against the more exclusionary Traditional Luxury in favor of participation from an increasingly diverse population. Nearly half of people (44%) say luxury is an intangible feeling that can mean different things to different people. This means brands must know what is meaningful to their customers on an *individual* level if they want to help them bring luxury moments into their everyday.



Luxury Is Relative

We dug into social conversation to see how people are currently talking about luxury. There’s clear recognition of just how relative luxury can be, depending on your personal financial circumstance, outlook, and which communities you belong to. It also underscores how *intangible* luxury can be.



@MHaffizJ

*"Luxury" is relative.
For most, KFC is daily food. For some, it's an annual celebratory food.
For most, Air Jordans are for years of savings. For some, it's a hobbyist's purchase.
For most, Cartier Tank watch is an ultra luxury. For some, it is a mid-tier watch brand.*



@cpoliticditto

*My wife grew up thinking that having water/ice dispensers IN THE FRIDGE DOOR was a life goal.
I grew up thinking if you had a basketball hoop with a clear plexiglass backboard, you were rich.*

Socially

Generationally

Monetarily



@McDaegals

Knowing the lyrics to cool kids is elite



@kivraw

Your gif game is elite



@sophiaroselle_

@ColleenB123 this playlist is elite (the playlist: taylor swift songs on shuffle)

Communally



@the.holistic.psychologist

The 'mid-life' crisis is happening at younger ages. Generations were raised with an obsessive focus on achievement. The result is 30 year olds who don't know who they are living unfulfilling lives. Older generations tend to mock a desire for fulfillment because they never got to experience it.

Traditional Contemporary Luxury For Me

Just as Traditional Luxury remains current, Contemporary Luxury isn't necessarily the most relevant. When asked which attributes of luxury matter to them personally, people's responses ranked quite differently. The #1 thing people consider a luxury across North America: **Comfort**.

In a world filled with uncertainty – a global pandemic, a mass shooting every day in the US, climate events like the wildfires in Canada, inflation and economic uncertainty – comfort is now aspirational. Understanding what worries people will help brands lean into how they can help people find comfort.

Qualities of Luxury Important to Me

	1	2	3	4	5
TOTAL	Comfort	Pampering	Extravagance	Exclusivity	Experience
GEN Z	Comfort	Exclusivity	Experience	Pampering	Aesthetics
MILLENNIAL	Comfort	Pampering	Exclusivity	Experience	Extravagance
GEN X	Comfort	Pampering	Craftsmanship	Experience	Extravagance
BOOMER+	Comfort	Pampering	Extravagance	Craftsmanship	Exclusivity

What Does Comfort Look Like Today?



In April 2020, during the height of COVID uncertainty, Facebook added a hugging heart reaction emoji to let people offer a comforting digital hug as an expression of caring.

Source: [USA Today](#)

“



My idea of luxury is simply having all the necessary resources that I need to get by with a comfortable amount of money leftover.

- Male, Gen Z

Just living comfortably and having what I need and some of the things I want. Being able to pay my bills.

- Female, Gen X



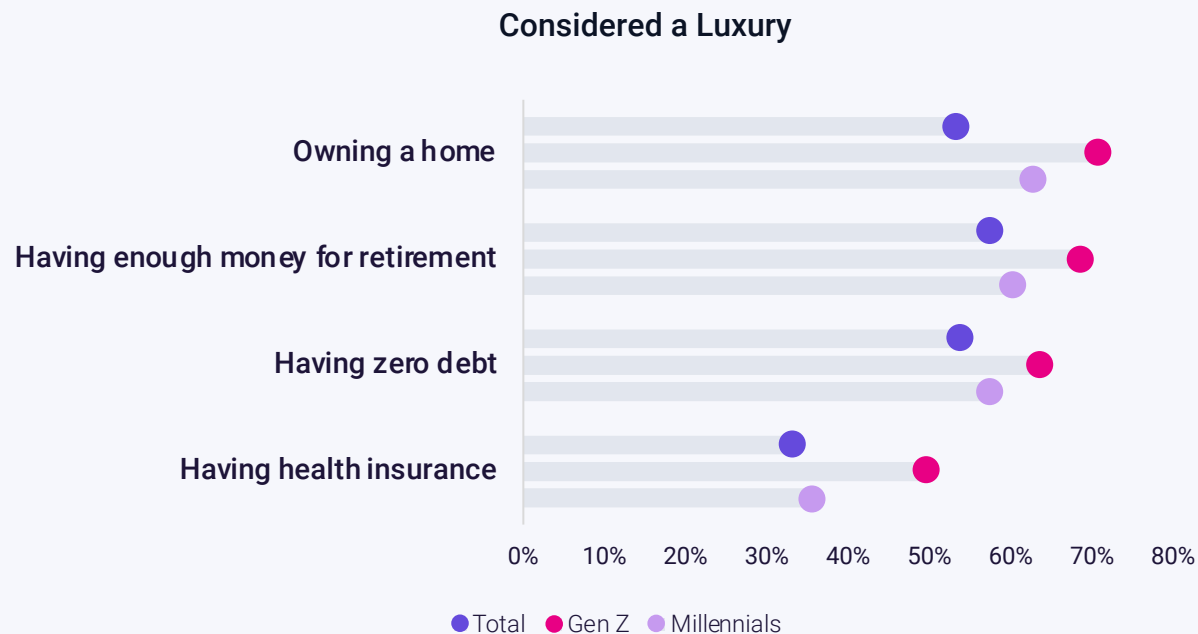
Things that bring me comfort but I can't always have and enjoy. Eating out, ordering in, going on trips, going out in general.

- Female, Gen Z

For Many Younger People, Necessities Are Luxuries

Over half of people across North America see necessities like having no debt, owning a home, or having money to retire as luxuries. These numbers rise among younger people, with Gen Zers over-indexing by 10+pts.

While these things may be considered luxuries for most at this early stage of adulthood, today's social and economic climate — and a lack of government support — have arguably made attaining these necessities more challenging.



65%

of Gen Z and 64% of Millennials feel they will never reach the personal or financial success of their parents.



@biasbe

1. Living in the same place for more than a year.
2. Having a bed that's not a futon or directly on the floor.
3. Having a car that isn't about to break down at any second.

“

Luxury would be having freedom from financial instability... and not stress about not having money to pay my rent.

– Female, Gen Z

The things that are luxuries to me in my life are my dogs and ... being able to afford rent every month.

– Female, Gen Z



Pursuing Your Passions Is A Personal Luxury

Even though many struggle to afford necessities, they're still willing to spend on things they're passionate about. Fandoms play a key role in the modern aspirational economy: they create value. Members of fandoms belong to exclusive groups who join forces to defend the objects of their enthusiasm from "haters." And while being a fan doesn't have to cost anything, today's social media pressure to put your fervor on display has turned the experience into a competitive battlefield of one-upmanship.

Add in economics and you end up with a divide among the people who can afford to travel, access concert tickets, stay in hotels, buy merch, and take time off work and those who can't. Even if your fandom isn't one of today's hottest concert tickets or top sports teams, it still requires the free time and disposable income that are a luxury to many.

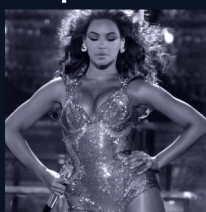
63% of people 18-34 prefer to buy a product/service because it gives them access/feeling of belonging to a specific community.

\$1,311



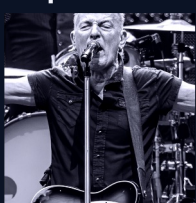
Taylor Swift

\$480



Beyoncé

\$469



Bruce Springsteen

\$252



All

Up from
\$152 in
2019



Image Source: [Cosmopolitan](#)

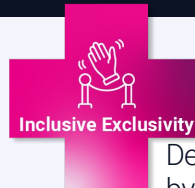
Friendship bracelets from Taylor Swift's Eras Tour have become a phenomenon among fans who wear, make, buy, give away, and trade them, enhancing the shared fan experience.

Average resale price of a concert ticket

Source: [SeatGeek](#)

Gen Z + Exclusivity

You may have noticed that both Gen Z and Boomers list exclusivity among their top luxuries. For Boomers, exclusivity is for-me-and-not-you; for Gen Z, exclusivity is more inclusive. We have more on this trend in our newly released 2023 Top Trends Vol. 2 report, available to download on [Horizon Catalyst](#).



Inclusive Exclusivity

Democratized luxury defined by shared community values, passions, and tastes is taking the place of income-based status signals.

Pampering Is A Priority, Especially For Moms

After comfort, **pampering** is the second highest priority when it comes to people's personal definitions of luxury. For moms in particular, taking care of themselves can supercharge their ability to care for others. In chaotic times, people need to give themselves permission to take better care of themselves, something moms struggle with.

There's no place that reinforces the idea of giving yourself permission to pamper than social media, where people share the goods and practices that make everyday living more rewarding. The #selfcareroutine hashtag has 6.5B views on TikTok and #littletreat has 38M views and is often presented as a form of self-care – or at least a harmless coping mechanism. Our 2023 trend Little Luxuries reflects this need for small-scale hedonism. You can read more about it in our [Top Trends 2023 report](#).

74%

of adults 18+ say that despite their concerns with inflation, they still make room to spend on their favorite little indulgences.

Source: Horizon Media Finger on the Pulse. Survey Fielded January 9-12, 2023; n=999



'Little Treat' TikTok videos like this one from @LeanBeefPatty with over 2.5M views, are trending on the platform.



Living by one's own definition of happiness in a chaotic and restrictive world is morphing into an embrace of small-scale hedonism.

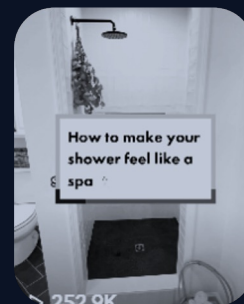
With over half of moms (56%), Millennials (52%) and Gen Z (52%) saying quality "me time" is a luxury (vs. 46% of total adults), the home bathroom has become the ultimate escape from the outside world. Bathrooms are the most reliable place a mom can embrace "me time," which is why creating a Zen, spa-like atmosphere has become commonplace. Content on social showcases both aspirational images and more attainable DIY solutions:



✦ **#spabathroom** on [Instagram](#) and [TikTok](#) shows perfectly curated images and videos of neutral-colored rooms fit with plush chairs, rugs, and plants complete with massive, round bathtubs.



✦ **POV: The ultimate self-care Sunday** (1.1M views)



✦ **DIY: Creating a professional-looking spa bathroom at home is doable with a few affordable design hacks.** (253k views)



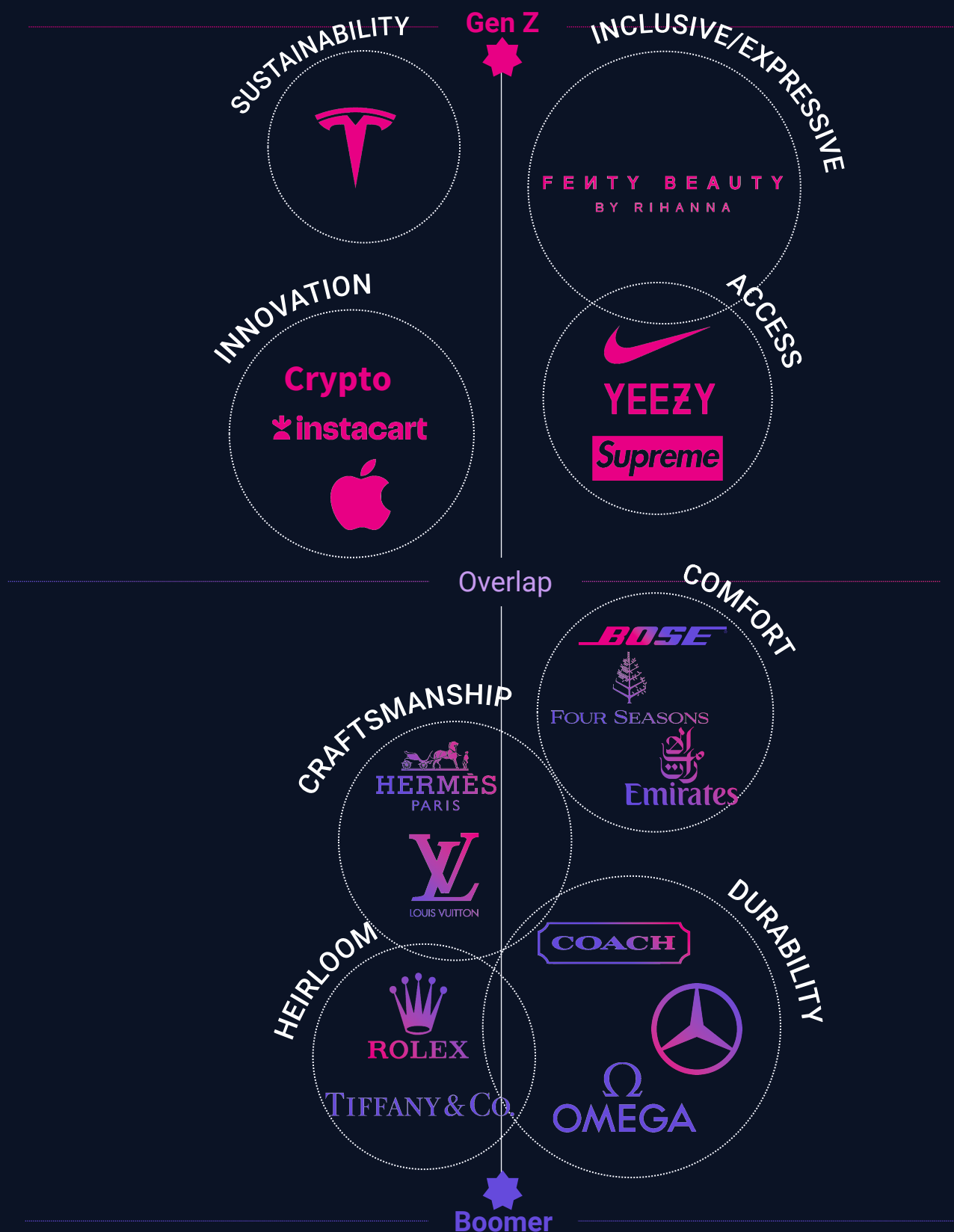
The Luxury Brand Paradox

Gen Z straddles Traditional and Contemporary Luxury

Gen Z'S Aspiration Paradox

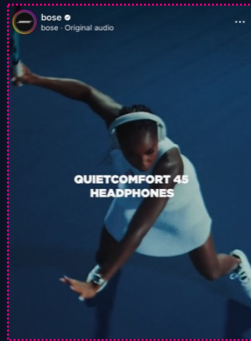
For Gen Z, contemporary innovative brands trump classic luxury.

Gen Z is more likely to see contemporary brands as luxuries compared to Boomers. They gravitate toward brands that make them rich in social capital, like Yeezy, Supreme, and Nike. But some established traditionally aspirational brands have expanded to incorporate more contemporary codes, winning over Gen Zers and Boomers alike.

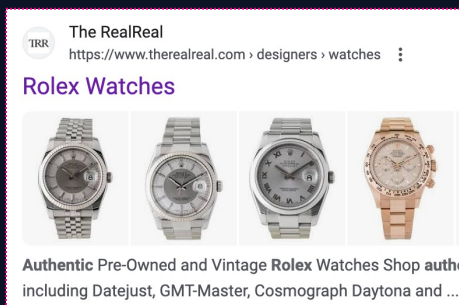
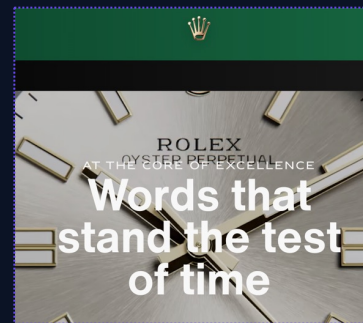


Gen Z**Boomer****Comfort**

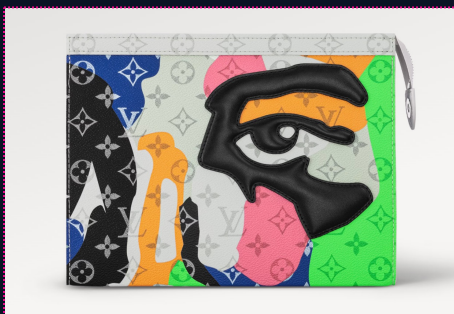
For Boomers, comfort is more about soft surroundings. For Gen Z, comfort is about escaping into a world of their own design.

BOSE**FOUR SEASONS**Four Seasons**Heirloom + Durability**

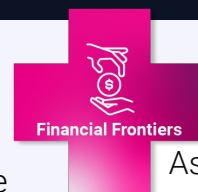
For Boomers, these attributes suggest a product will last and the investment retains its value for generations to come. For Gen Z, they mean a product will retain its value for resale in the near future.

RolexRolex**Craftsmanship**

For Boomers, craftsmanship means hand-made with attention to detail and technique. For Gen Z, the craft includes artistic expression.

Louis VuittonLouis Vuitton**Gen Z + Durability**

Both Gen Z and Boomers value durability in luxury, but for Gen Z, durability is more about how a product will retain its value for resale in the near future. You can read more about this in our trend [Financial Frontiers](#) on Horizon Catalyst.



As financial uncertainty persists, new systems of creating, exchanging, and securing wealth emerge.



Decoding Luxury by Category

People's expectations differ by category

Category Preferences Create A Complex Matrix Of Expectations

As people embrace the age of personalized luxury and explore their own individual definitions of the term, these personalized sets of expectations will be top of mind as they consider purchases or experiences in different business sectors.

The following pages delve deeper into tech, dining, and fashion — three categories selected due to the significant shifts in expectations revealed by our data analysis. If you want to learn more about other industries, deep dives are available via askwhy@horizonmedia.com.

Luxury Attributes by Category



1	2	3	4	5
Comfort	Experience	Pampering	Convenience	Uniqueness
62%	50%	35%	33%	27%



Comfort	Experience	Pampering	Uniqueness	Authenticity
43%	41%	35%	31%	26%



Convenience	Comfort	Sustainability	Authenticity	Uniqueness
34%	32%	27%	21%	20%



Comfort	Durability	Craftsmanship	Uniqueness	Personalization
43%	41%	38%	33%	32%



Comfort	Pampering	Personalization	Experience	Convenience
49%	40%	35%	24%	22%



Durability	Comfort	Craftsmanship	Innovation	Investment
51%	47%	45%	39%	31%

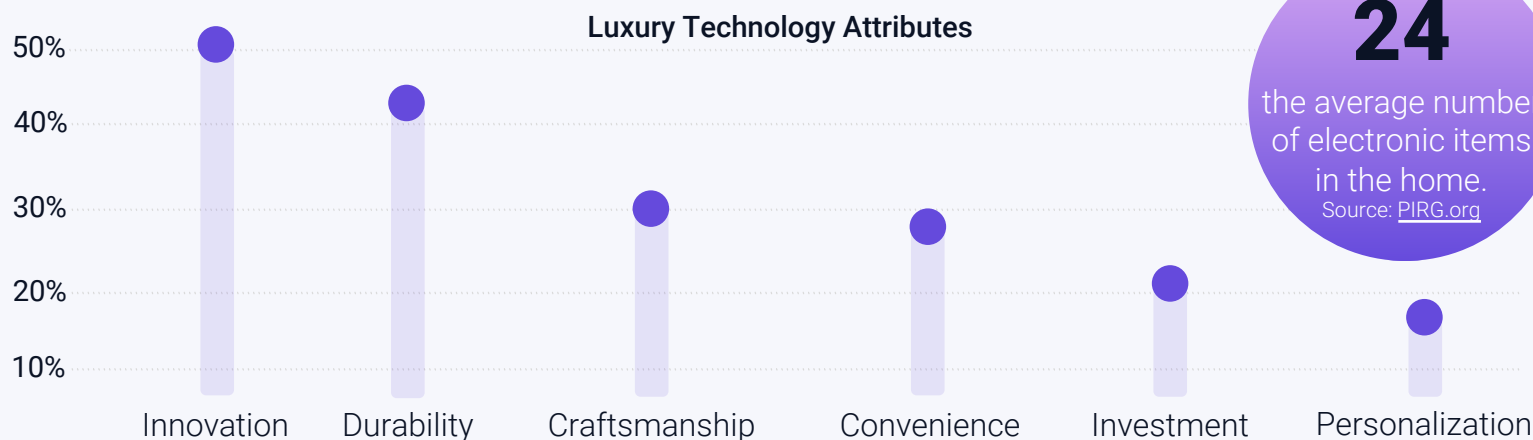


Innovation	Durability	Craftsmanship	Convenience	Investment
52%	44%	30%	29%	22%

People Want Durability And Craftsmanship From The Fast-Moving Tech World

Innovation and technology go hand-in-hand. But in a world where tech often moves too fast for people to keep up, people's desire for **durability** and **craftsmanship** from their technology indicates that keeping up has become a burden. And more than a burden, the lack of durability of many tech devices has created a significant environmental and waste problem, which is drawing increased scrutiny. The desire for craftsmanship reflects a preference for products that are thoughtfully made rather than mass-produced. We're seeing people and brands speak about tech products using the craft-focused language of Traditional Luxury, emphasizing form, function, and longevity.

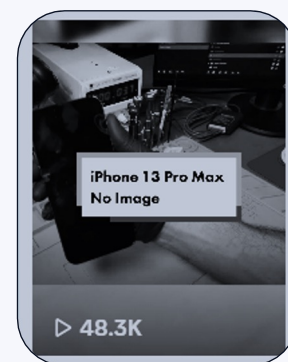
Brands can increase confidence in their products through longer warranty periods, free repairs, trade-in discount programs, or educational content on "how to" best practices for care. Brands that help alleviate the stresses of planned obsolescence will be given favor when it's time to buy. Partnering with social channels like TikTok or Reddit, where people look for answers to their questions, could help tech brands own the conversation.



British stove brand [AGA](#) combines the best of new and old worlds with its bold design, contemporary details, trusted heritage and technical acuity. Sixteen available colorways ensure that the product reflects your personal style.



Bringing high-touch craftsmanship to the tech space, [FINEDAY's](#) 3.0 "typewriter" boasts "an extraordinary visual display" that is durable and "guaranteed to last a decade," as well as meticulously crafted by skilled aluminum craftsmen with each keycap made from a single sheet of aluminum, delicately trimmed into shape, and engraved with perforated letters.



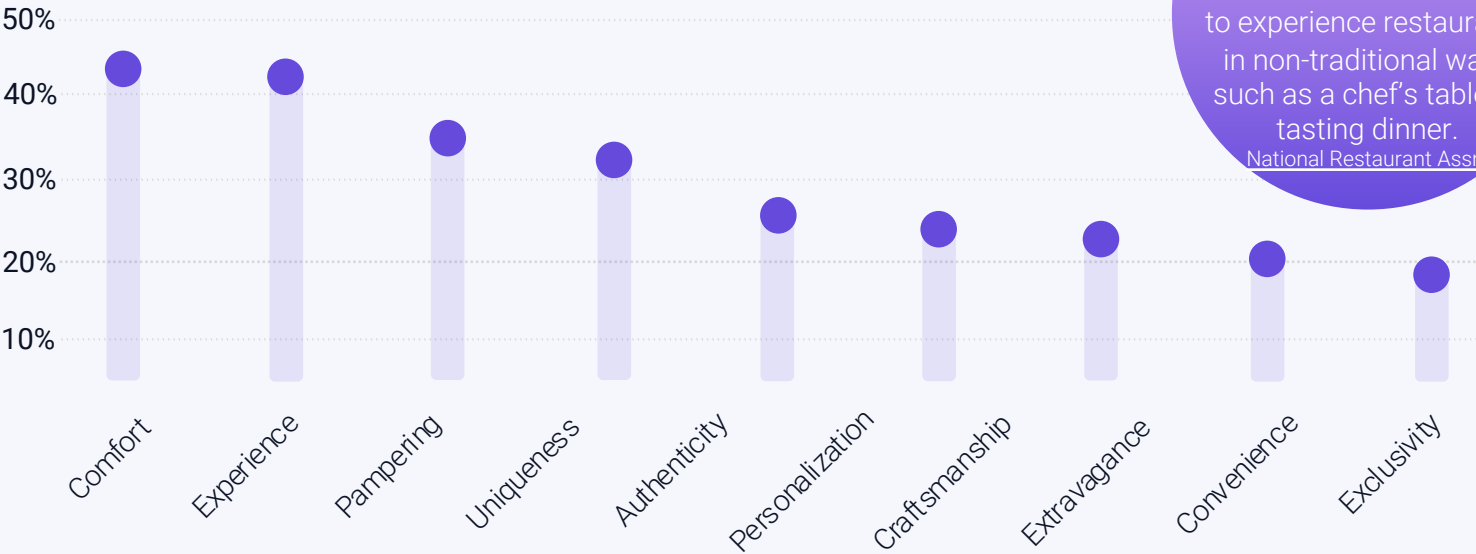
Frustrated with the planned obsolescence of cell phones, accounts like the [Cell Phone Repair Academy](#) provide a full repair curriculum as well as bit-size TikTok videos on tech repairs big and small. #iphonerepairs has 2.3B views on TikTok.

Diasporic Dining Is Luxury Dining

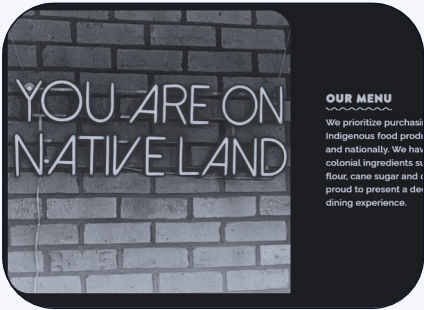
There’s no better way to find new and exciting culinary experiences than by tasting the cuisines of other cultures. Widespread sharing on social media increases the appetite for unique and authentic dining experiences and is being reinforced by major culinary institutions, like the Michelin Guide and James Beard Foundation, who have begun recognizing and celebrating a more inclusive array of diverse flavors, cuisines, and cultures.

For food brands, think globally. Expanding people’s palates can also expand their minds and create unforgettable and transformative **experiences**. Ensuring authenticity that focuses messaging on **comfort** and **inclusivity** is key – especially for premium products. Invite experts and members of different global communities to collaborate or create a guidebook based on tracing sourced ingredients that inspire wanderlust travelers to plan their next adventure.

Luxury Dining Attributes



2/3 of US Gen Z and Millennials are more likely to experience restaurants in non-traditional ways such as a chef’s table or tasting dinner.
[National Restaurant Assn.](#)



Source: [Owamni](#)

Owamni by the Sioux Chef (named best new restaurant in the US in 2022/James Beard award) is an indigenous-owned and operated restaurant in Minneapolis using decolonized ingredients “the true flavors of North America.”



Source: [Timeout NY](#)

This new speakeasy-style bar, with a secret entrance in an unassuming neighborhood Thai restaurant, has several elements that reflect luxury: unique and Insta-worthy cocktails (craftsmanship), flavors of the global diaspora (authenticity + uniqueness), and a “secret” entrance (experience).

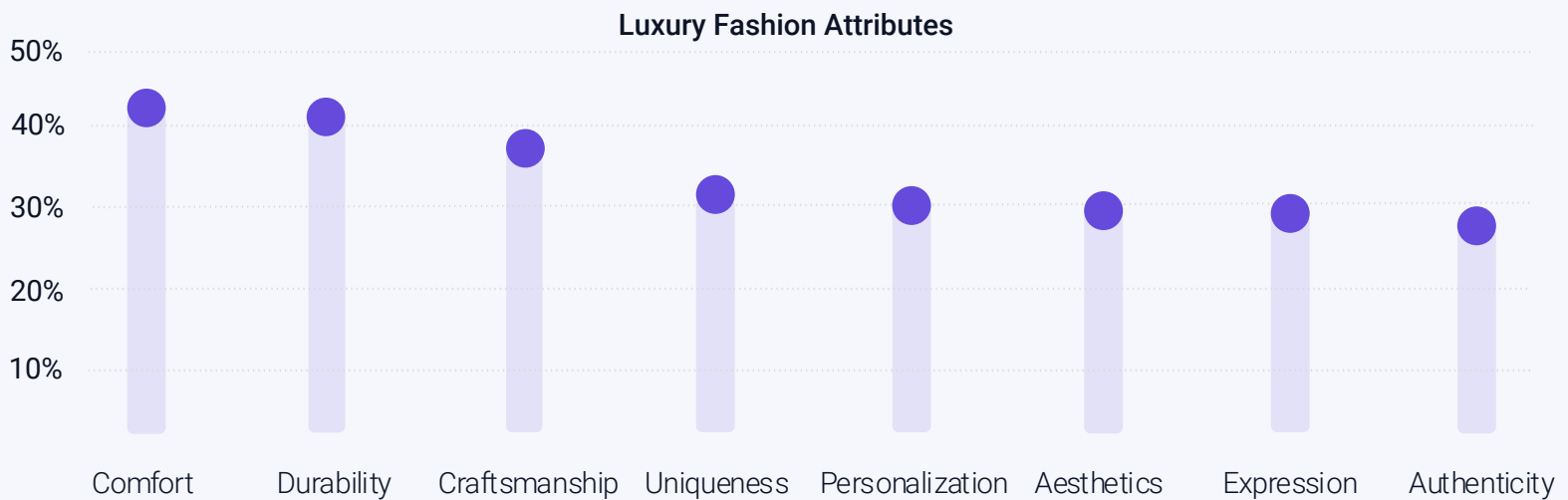


Hong Kong-born Toronto-based Top Chef Susur Lee and his son [JetBentLee](#) (6M TikTok followers) create dishes using ingredients from around the world. The multi-cultural and multi-generational interplay makes their videos informative and heartwarming.

Luxury Fashion Is “Made For Me” And Made To Last

North Americans want the same things from luxury fashion: **comfort, durability craftsmanship and uniqueness**. These values are the driving forces behind the cultural signals we’re seeing in the fashion world, including things like luxury and athletic brand collaborations, Etsy’s YOY revenue [growth](#), new technologies being used to verify secondhand purchases, and social influencers who educate on what good craftsmanship looks like, and what is worth your hard-earned money.

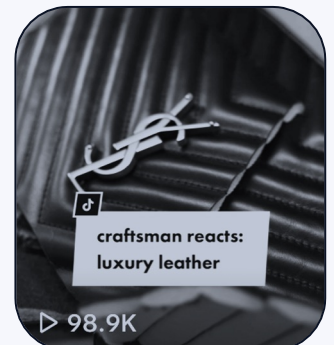
For brands, partnering with credible influencers like Tanner Leatherstein (see below) to prove the craftsmanship and durability of a product could help convince people it’s “worth it.” There’s also an opportunity to show craftsmanship at work in social content that features ASMR, time-lapse, or even slow videos that highlight the painstaking process of making a single item. Process-as-entertainment content has become popular on social channels for its oddly comforting effect.



Athleisure is the ultimate comfort. The partnering of powerhouse athletic and high fashion brands like [Adidas x Gucci](#) or [LVMH x 2024 Summer Olympics](#) take comfort and style to new heights.



This jacket by [Bode Senor Cord](#) is a one-of-a-kind, designed 100% customized to the buyer. But it’s more than that – the tradition dates back to 1904 (in Purdue, IN) where seniors would signify their milestones with customized corduroy jackets. Students and celebrities (Jeff Goldblum, Harry Styles) [are carrying this tradition onward](#).



TikTok account [@TannerLeatherstein](#) (869k followers) deconstructs designer leather goods to show how they’re made and which ones are worth the money, helping people better understand craftsmanship, value, and authenticity.



Key Takeaways + Brand Implications

What to know and how to activate

Key Takeaways

✦ **Luxury has shifted from a fixed, top-down definition to a flexible, bottom-up definition.** But rather than serving as a replacement, multiple definitions of luxury coexist for different people at different times.

- The flexible, bottom-up definition of luxury has emerged to cater to a diverse audience. This perspective views luxury as more personalized and experiential. It focuses on qualities like authenticity, sustainability, innovation, unique experiences, and personal well-being. For these individuals, luxury might mean having the freedom to choose what aligns with their values and desires, rather than conforming to traditional notions of extravagance.
- Traditional Luxury is still alive and even doubling down on exclusivity, creating a tighter circle for a smaller, wealthier, audience. The traditional, fixed, top-down definition of luxury still holds true for some individuals and segments i.e., Boomers. For them, luxury might encompass rare and expensive items, exclusive brands, and opulent experiences. This version of luxury is often rooted in heritage and status.

✦ **Comfort is the new aspiration.** Personal luxury is less about a fixed status or ideal, and more about finding your own comfort – comfort that comes from tuning out stressors in a chaotic world, comfort in the form of inner peace when you live in alignment with your personal values, comfort obtained from treats peppered into a daily or weekly routine. Luxury on a small scale, and on an individual's own terms, gives more people more opportunities to participate. More luxury moments mean more stories to tell about a life well-lived. Turning moments into memories makes life feel more meaningful, which is the ultimate comfort.

- One-third of people in North America believe luxury is something you do for yourself every day rather than a rare indulgence – and this is even more true for multicultural audiences (+7pts US). The reclaiming of luxury by a broad swath of the population for everyday occasions opens the doors to participation and makes luxury more inclusive.

Key Takeaways

- ✦ **For younger people, necessities are luxuries.** In the US, three in four Gen Zers see healthcare, being debt-free and owning a home as luxuries. For Canadians, these feelings are stronger with Millennials.
 - This vision of a life well-lived and status through stories and experience stands in for the parts of the American Dream that feel unattainable now, such as the guarantee that each generation will fare better financially than their parents.
- ✦ **Pampering “me time” is a priority for mothers, Millennials and Gen Z.** Whether it’s a mom wrestling with giving herself permission to take a self-care time out, or a young person looking for a DIY spa day, finding moments for participation in small-scale hedonism can give people the time they need to recharge so they can take on life’s unpredictable challenges.
- ✦ **Each industry category comes with its own set of expectations.** For example, people want durability from tech, authentic experiences from dining, and craftsmanship and comfort from fashion.
- ✦ **For Contemporary Luxury, innovation and sustainability are brass tacks** for business success, rather than a point of differentiation. As people “vote with their wallet,” there’s little room to not be making continual advancements in these areas.
 - Expressive Luxury is where Contemporary Luxury is moving to reflect an increasingly identity-first culture. Social media platforms give ordinary people potential shortcuts to social status and influence centered around their own style and taste.

The most powerful way to apply this thinking is to work with us on a brand-specific basis, as the translation for any one brand or business will be both specific and unique.

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Brand Implications

1

If your brand is steeped in Contemporary Luxury codes, making connections to more traditional codes could be key to avoiding isolating customers with the most money to spend. Likewise, for Traditional Luxury brands, having separate communications that speak to contemporary values will attract younger customers, even if it's a stretch financially.

For example, a stalwart brand like Brooks Brothers could partner with TikTok fashion influencers like [Tristan Detwiler](#), [After Always Apparel](#) or [CanYouCouture](#) to create custom, one-of-a-kind pieces from the fabrics or items in the brand's collection, giving them a fresh, sustainable sensibility that would appeal to younger Contemporary Luxury customers. Play up other attributes besides sustainability, like the one-of-a-kind nature of the pieces.



Brand Implications

2

With people overwhelmingly looking for comfort, brands need to think about what they can do to help people feel better in their day to day. The role of fandoms has likely taken up a bigger role in people's lives for this very reason.

A traditional luxury brand looking to connect with younger audiences can think about ways to bring comfort to select fandoms. For example, Rolex, with its quiet, sweeping secondhand, can create quiet spaces at loud and chaotic sporting events. Luxury areas where people can get away and take a time out from sensory overload will provide a dose of necessary comfort.

Alternatively, a luxury accessory brand like Kate Spade can look to connect with fans around popular concerts by creating an unforgettable experience adjacent to the concert itself. With ticket prices sky high and seats hard to come by, the ["concert outside the concert"](#) has become an event unto itself where people can feel special rather than left out. Stadiums adjacent to bodies of water have seen boats anchored and listening in the open air. The brand could charter a yacht to host fans and offer a one-of-a-kind experience that caters more to them as individual fans than going to a concert ever could.



Brand Implications

3

Tech innovation and personal expression are hallmarks of Contemporary Luxury. At the same time, AI is creating strong intrigue as its maturing capabilities become more widely available.

A home design brand such as Benjamin Moore can use AI to create custom paint palettes based on a favorite picture or piece of art. It can also be used to create custom home accessories – think picture frames, vases, objects, bookends, and bowls that can be 3D printed on demand.

Furthermore, a collaboration with a luxury fashion brand like Gucci could feed its colors, designs, and patterns into AI as a database to create custom prints and 3D-printed objects, such as planters or book ends, based on the brand's graphic assets and aesthetics, tailored to individual tastes.



Hibiscus with Plumeria via [Smithsonian American Art](#)

APPENDIX

Glossary of luxury attributes

Luxury Attributes Glossary

The definitions we provided to survey respondents alongside each attribute.

Access Opens doors that are normally closed

Aesthetics Pleasing to the eye, form over function

Authenticity Verified as an original

Comfort Feels good

Convenience Frees up my time

Connection Makes me feel part of a specific community

Craftsmanship Attention to detail

Durability Made to last

Exclusivity Limited access, VIP

Experience Exciting, adventurous, new to me

Expressive Lets me express my style/taste

Extravagance Over the top

Heirlooms Can be passed down for generations

Innovation Uses the latest technology

Investment Retains its value over time

Pampering Highly attentive service catered to my needs

Personalized Made just for me

Prestige Signals social status

Sustainability Doesn't harm the planet

Uniqueness Original, novel, one-of-a-kind

THANK YOU

Get in touch!

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