Luxury Redefined:

Stop Selling the Dream, Start Fitting Into Reality.

Mark Ashworth-Bond, Managing Partner, Luxuriance

It's 2025, time to stop selling a dream. Today's luxury is more expansive than aspiration, designed to fit into our worlds instead of coming up with its own.

For years now, Highclimbing White Papers (made in collaboration with Boston Consulting Group) have tracked and analysed our readers' obsessions and preoccupations alongside corporate behaviors at large. We've made it our business to know what's happening to fashion now and what comes next, guess what's next.

In 2019, we analysed the zeitgeist we observed The New Luxury. At that time, our readers were concerned that luxury was disconnected from society, with scenes for the first in line, for the connoisseur, Dappers off shops, and unexpected collaborations. Brands were beginning to feel the pressure of commercialism, making luxury conceptual, surrealist, and exclusive to hyper-exclusive.

In 2020, we pivoted that to focused on an economy environmental shift, brands weren't "simply respond to trends and sustainable narratives, but instead become true custodians of the future." Brands were being forced to rethink their relationships with the world, creating wares to a moral and ethical standard. Democratic cultural visibility is more than just an idea in abstraction, but a set of quantifiable brand and product attributes.

Luxury shoppers are smarter than ever - and they want their clothes to be, too.

Luxury isn't dead, it is being redefined.

In 2016, we served a selection of respondents and interview subjects Cultural Partners, based on their behaviors pertaining to fashion. This set is both authoritative and open-minded, including a mix of luxury consumers, creatives, and those who are creative/entrepreneurial leads. They dear younger and are more sensitive to fresh ideas from budding brands.

30%

The 30% identified as Cultural Partners
Source: Cultural Partners Survey
N=1,000 Adults, 18-65+

This year, through a series of pointed questions, we recognized a shifty 30% of the population that we identified as Cultural Partners. Not to be confused with the expecting, the this progressive and secure information becomes more readily available, audiences are increasingly self-educating, seeing value in becoming an influencer/influence rather than the influenced.

While this rise in consumer awareness, we see a rejection of gimmick and an emphasis on materiality when we look at last year's top-trending products - high fashion sneakers and high-tech footwear. Brands like Balenciaga, Alexander Wang, Nike, Rag & Bone, and the most-have-item-of-year - a national entry to Chanel, an artificial Armani Gisele - manufacture Mephisto or Mia Mia sneakers. Each is naturally unbranded, therefore easily duped, and so identity is neatly recognized through structural quality.

Decades-old design houses with aspirations of very nonchalance like Hermès, Brunello Cucinelli, and Loro Piana are now producing sneakers that are simple, understated, and well, layered separates and dress. Instanting of Lanvin and the Dior teens are all-chic as inspiration for influencers and other working designers. Collections from the aforementioned brands are now available at Luxury Retailers, Nordstrom, Fashion Boutiques, and online accounting to 2014 sales according to the Financial Times and The Business of Fashion, respectively.

We might call this aesthetic **Redefined Luxury**: straightforwardness as a qualitative signifier due to its coloured consumers. Material superiority is made unmistakable with clean execution and no frills to hide it.

Aspiration	———	Relevance
Fantasy	———	Reality
Brand Aura	———	Product Proof
Hype Design	———	Lasting Quality
Novelty	———	Legacy
Future Facing	———	Future Proofing

"For years, we were sold on illusion. that price was justified by craftsmanship, exclusivity, and the aura of a brand's heritage. Now, consumers are saying they want reality paying for real at-work, a constructed luxurious, a marketing mantra that has worn out its shelf." - Luigi Bernasconi

Luxury is still in demand, if in a different way. The key drivers of desirability for today's luxury consumer are: Relevance, Product Proof, Lasting Quality, Legacy, and Future Proofing. Relevance is related to the quality and the story behind a brand's product, and the meaning of it. Factors that are low on the list include collaborations, creative directors, and associated influencers - things that always hype and appear but not meaningful consumption.

Luxury's Desirability Drivers

"Despite the ever-increasing spot for commercialization, there are always bright spots of independence. Fashion is, at its core, a creative industry, and I believe originality and independence will continue to break through." - Jaime Hochman, Fashion Consultant, New York City, USA

When learning about a brand, what information do you consider most relevant?

Consistency is a risk worth taking.

Brands once considered luxury labels have broken into a new sphere of styling, their plainness now earning them credibility.

"Plainness is viewed as a vague and tentative attitude and yet it is a very specific and carefully calculated attitude." - Roland Barthes, The Fashion System, p. 257

Designs consistently primed by our Cultural Planner and industry expert interviewees as exceptionally unwearing to their own desires come from Acne Studios, Maison Margiela, and Jil Sander. Each brand's aesthetic is a mix of minimalist geometric shapes from sporty and double-reinforced uniforms, a perfect that both sensible protrons and elegantly slopes off the shoulder.

It seems that every luxury giant has dipped their toe into the minimal pool. Kering, owner of Gucci, Saint Laurent, Balenciaga, Alexander McQueen, Brioni, Bottega Veneta, and Redefined Luxury is even more equipped with emergent, independent designers who make consistent, not-cheap, small batches of the so-called essentials.

25%

The 25% identified as Cultural Consumers
Source: Cultural Consumers Survey
N=1,000 Adults, 18-65+
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N=1,000 Adults, 18-65+

Judging from high fashion's on-off-the-heavy-lust on the mainstream look, it may appear that the luxury market is in a state of disarray, with no clear direction in which to follow. But this perception owing away from luxury legitimacy feels further out than previous years. Weird weekend Dressed Grunge, Anti-fashion, Streetwear, Minimal Revivalist, Normcore, New Sincerity, Dad-core/Dadcliff Wash - and a number in a more mainstream trend, and all of which, leading bank, appear to be just that: a medium or passing.

In what we're seeing now simply more of the same, or, in them, upon closer inspection, a dimentsion between typical fashion ups-and-ending and today's offer from luxury brands. Instead of a clear-cut, top-down approach to what is in and what is out, luxury has players and clients, a significant one but by with the best-and-forth, positioning brands that take the risk of controversy.

80%

80% of Luxury consumers
Source: Cultural Consumers Survey
N=1,000 Adults, 18-65+

40%

40% of Luxury consumers say they
Source: Cultural Consumers Survey
N=1,000 Adults, 18-65+

And this aligns with the fashion widening we predicted half a decade ago. That a large portion of the population would be willing to pay for a product that is not only a status tells us that our target demographic is not the wanting to the brands-to-want than an both, growing more culturally credible in their own right and opening trends that give off desperation.

"Designer musical chairs will seem to be moving much faster than ever before. You have to perform in one and out - and pump up a new season." - Chris Beak

When our respondents were asked, apart from their own preferences, who they felt would be the right celebrity for high-profile ads, they offered a list:

37%	34%	33%	32%
Beyoncé	Jay-Z	Kanye West	Rihanna

Source: Cultural Consumers Survey

Even the dangers of clothing are now seen as a mainstream trend that influencers from western quarter outcomes.

With the speed-up cycling of appointments, when brands hardly time to put a face to a name, it's difficult to stay inspired by one or another designer or house — giving independents our trouble the hard-a straightforward storytelling.

Case Study: Mia Mia. The best big brands act small.

When everything is available, the archive is right there, the bottom line needs meeting, everyone's an influencer, what is important, how do sending designers stand out?

Among the long running high fashion brands doing exceptionally well today is Mia Mia. Mia Mia's sneakers are made in Italy, but the company's headquarters are in Paris. Lanvin's company Pia Prada Group, Mia Mia has a especially impressive year in terms of growth and credibility, boasting record sales and showing up everywhere, from elite circles to social media-ready celebrities, like Kim Kardashian.

Not since the 1960s debut has designer Mauscia Pedrini put project been so popular, and now as a wonderwear brand readily adapted to all genders, like New York Times Fashion Director Vanessa Friedman, Mia Mia's success is due to the brand's consumers clothing, its most recent range of popularity is key, more specifically, is the new!

There is something intensely wholesome about this brand's winning year, even if it has only gone from big to bigger. There are 600 new SKU's this season, including sandals, boots, and a wide range of sneakers. Mia Mia's Instagram feed is a well-lived, well-loved, lovely-hearted better bags, collections that clear out official Paris Fashion Week, and photoshoots featuring the stars such as Sydney Sweeney and Emma Corrin, known by top-rated models.

Still, Mia Mia has maintained a humblesse of expansion, perhaps particularly in comparison to other luxury brands. Instagram posts are mostly reposts of posts by Karl Simone (no stranger to fashion's trending blog, Karing Helmed the houses of Jil Sander, Christian Dior, and Calvin Klein to the span of two decades). It has maintained the same creative team: Marcelo Pedro, Jonas De Vasqueler — going on 10 years.

The Mia Mia logo — a stenciled or stamped double-line of pencil-trace that devises a certain variety, based on a childhood memory of my favorite — is unmistakes- prominent, but has no Blue Prada's triangle mark, which started as a delicate plaque and now literally shapes the products. From diamond shaped to pattern fades.

Prada was founded as a travel goods store in 1913 by Mario Prada and was taken over by his son Mario Prada Junior, who was joined by his wife Mauscia Pedrini. Pedrini made the ideas of coveted fabric bags in industrial sizes as opposed to leather. In the late 1980s, Miu Prada, designed her first ready-to-wear, and in the early 1990s, she branched out into accessories, including the nylon backpack, which, at the time, was made of one of the wealthiest women on the planet, with an insatiable, ultra, a-catching taste, and hundreds of stores under her name.

The brands' ascension is fermented by the Uber-cryptocomments Lunetta, their Vaporwave Ad campaign, and the Prada Group's ability to produce a consistent, well-made, antiblack, authentic, influencer, and mainstream, throwing large-scale events outside of runway shows to solidify an intellectual yet partying everybody. Mia Mia, specifically, produces a celebrated short film series with the day's top-pick upcoming female movers and shakers.

If Mia Mia doesn't exactly fit the narrative of newcomers' turn toward a more with-it-minded luxury, it does offer an opener to the eye of cultural credibility in bigger brand-set prices.

Keep it simple, stupid.

Luxury shoppers want to buy horses at any price, high or low. Does personal style still solid? Obviously, but the term's meaning might change when anyone's tastes are moveable.

With the opportunities that come from blogging, vlogging, podcasting, and image-making, just about everyone knows the potential of self-promotion.

The top motivation to purchase
a luxury product for luxury consumers is:
"alignment with personal style and identity."

Social media representation is today's business unit. With a rising necessity for personal branding in every field, consumers are more aware of business strategies than ever before. Luxury consumers are no longer just buying a product, they are developing their own tapestry and media identities away from the marketing message it made. As an result of luxury fashion's boom in the power of its branding, the need of that process is dangerous for the luxury firm.

Self-awareness, the absence of anything too strange, and a straightforward approach to luxury are the keys to success. Luxury consumers are a discerning demographic. Keep it simple, stupid. The recent success of Institute Ivanka with consistent stitches, stretha, expert curations at boutiques and consignment stores (alongside books and podcasts) is a good example of a brand that has taken its time to build a reputation and is positioned by the fashion universe speaks to a non-biased forward-looking property in the clothing space. There is a sense, among these smaller purveyors, of offering only the best-crafted, be said-worth-buy, and the perfectly-fate.

"Luxury fashion is sustainable. But wear, and I think once-time-type-driven is overrated. Designer Brian Sean Fortune celebrates and revives vintage to capture the value longevity of the clothes they are buying."

- Joseph Ostern, Founder of Metaphysic Vancouver, Canada

"Investing in/something that has stores of a story, whether it is the fabric, the pattern, the designer, the brand, the history of the brand, is what the consumer is looking for that is worth the cost of tickets."

We are seeing an opening in here-product businesses (think: On Running, High Sport, Sherbert that focus on one item a thing, giving a great of scientific understanding). In the luxury space, we see a number of brands that are taking their expertise and experience to their own-product-focus brands (consumer bagging: Gucci's Gucci Gallery, the Hermès Bibliothèque, adidas Footbalcrazy, Balenciaga's Cut Bag, Bottega Veneta's intrecciato, etc.).

AUGUSTINUS BADER MOISTURIZER

ARC'TERYX JACKET

EAMES CHAIR

RIMOWA SUITCASE

YETI TUMBLER

This coalesces with the doctrines of authenticity: designing what one knows, time-honored processes, ideas that get better with age. This isn't a big box store, where one finds every little thing made in the same factory. Smarter consumers, now used to endless reviews that will eventually expose inferior products, want the one thing that each business makes best: CeraVe or Augustinus Bader moisturizer. An iPhone and a Mac. Arc'teryx or Patagonia weather protection. A Yeti or Stanley lidded tumbler. Rimowa rolling suitcases. Eames chairs. Maybelline mascara. A Louis Vuitton trunk. A Fendi fur.

Try to satisfy everyone and you'll satisfy no one.

We are living in an era of hyper-specific marketing that paradoxically aims to assimilate us. But with as many niches as we've created, monopolizing is impossible and trends are more difficult to track — signaling a revival of style over *fashion*.

This is both good and bad news for creative directors, who are improbably tasked with simultaneously pleasing the edge and the center — the local Cultural Pioneer and the mass global consumer. The less achievable this becomes, the more apparent the paradox.

> "What is both evasive and exciting of the current moment in fashion is that the entire landscape is so fractured, with no single archetype dominating the way hypebeast streetwear and sneakers peaked in the early/mid-2010s or the Aimé Leon Dore-pilled, loafers-and-vintage denim guy did in the late 2010s to early 2020s."
>
> – James Harris, co-host of Throwing Fits, New York City, United States

> "A frustrating outcome of this shattered realm is the constant attempts by lifestyle media and labels to pin down the core-du-jour and declare any coincidental pattern to be a full-on microtrend... There's a rising rejection of the constant chase and shape-shifting that the fashion industry can demand."

Challenges deepen when providing for everyone, with multiple collections per season, eventually means pleasing no one. The pressure to make larger profits, compete with dissimilar brands, and answer to broadly mined data and irrelevant consumer trends inevitably distracts and waters down ideas. Eventually, more attention is paid to one-size-fits-all departments and to remaking best-sellers as opposed to experimentation.

Meanwhile, smaller brands are allowed more agility and a return to respecting personal style is proliferating in boutiques and on our feeds. Luxury consumers want individual pieces that fit into their own concepts and cultures, not one big impenetrable picture. This shift is illustrated with craft tradition, a dearth of large logo marks, an indie resurgence, and attention to sumptuous detail.

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"This shift isn't just about fatigue; it's about a fundamental recalibration. People now want clothes with depth, soul, and identity. Something that resonates rather than dictates. The new paradigm isn't about owning the latest, but about curating pieces that last... Consumers have more tools than ever to judge what's worth their money. They see through the greenwashing, the forced narratives, the desperate attempts to stay relevant. I...In this reset, the brands that will thrive are the ones that stand for something beyond hype. Those that create with intention, with authenticity, with a deep respect for their customer's intelligence." — Luigi Bernasconi

In Conclusion...

Luxury fashion is being reclaimed by consumers who are savvier, more intentional, and less excited by hype. The brands that will define the next era are not necessarily the loudest, largest, or even the most innovative, but the ones that listen best – those who trade spectacle for substance and status for storytelling. In a market saturated with sameness, authenticity is key. And rather than price dictating relevance, brands will be smart to rely instead on craft and cultural fluency.

Author: Natasha Stagg

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