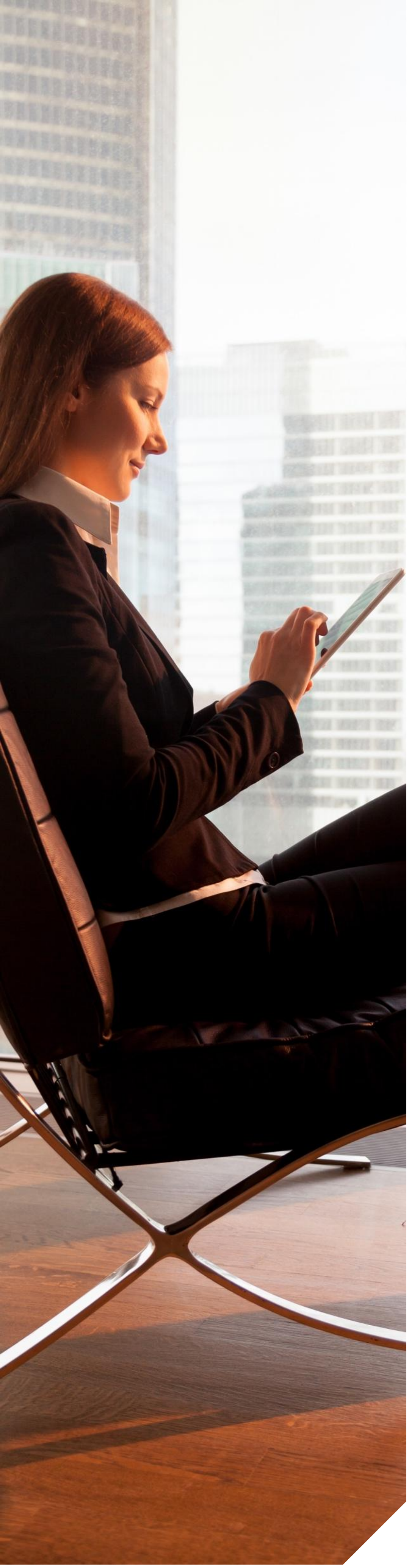
HEDONISM, HERITAGE AND HUMAN-CENTRICITY: THE NEW CODES OF GLOBAL LUXURY

Javier Calvar, **Valerie-Anne Paglia** and **Stephane Paoli**



CONTENTS

1. WELCOME TO THE AGE OF PARADOX

As we move deeper into the 2020s, the global luxury sector finds itself at a fascinating, albeit complex, crossroads. Based on the Ipsos Global Trends 2025 and other research conducted by Ipsos, this report outlines a market defined not by linear growth but by deep psychological duality.

We are witnessing a consumer base caught up between two opposing forces. On one side, there is a 'Carpe Diem' urgency – a drive for immediate gratification, status and hedonistic 'revenge spending' fueled by global volatility. On the other, there is a profound retreat toward safety, where consumers crave the stability of heritage brands, the anchor of established authority, and the reassurance of the past.

This report dissects seven pivotal trends and distills them into three overarching macro-themes shaping the luxury sector. From the 'Digital Duality', where Artificial Intelligence (AI) is both embraced and feared, to the 'Sustainability Expectation Gap', where consumers demand ethical supply chains without sacrificing convenience or prestige, we explore how these shifts manifest differently across the East and West. Specifically, we highlight the widening divergence between the status-driven growth markets of Asia-Pacific and the values-driven, quieter luxury consumption of the mature West.

This is your roadmap to navigating a landscape where brand equity is the ultimate safety net, health is the new wealth, and the human touch is the rarest luxury of all.

2. SEVEN CONSUMER TRENDS IMPACTING LUXURY

Based on the *Ipsos Global Trends 2025*[1], we have identified seven pivotal trends impacting the luxury sector. These trends highlight a duality in consumer behaviour: a strong desire for hedonistic, status-driven consumption (especially in emerging markets) balanced against a search for safety, heritage and 'meaning' in a volatile world.

Trend 1: The Supremacy of Global Brand Equity

This trend underscores the significant power of brand equity. It is not merely about a logo; it is a dual-engine driver where 'image' justifies the price premium and 'global status' acts as a proxy for superior quality.

The Data

- **Willingness to Pay:** 56% of global consumers are willing to spend extra for a brand with an image that appeals to them. This willingness is substantially higher in growth Asian markets (China, 81%; Indonesia, 78%; Vietnam, 74%) and more moderate in mature Western markets (France, 57%; the US, 51%).
- **Perceived Quality:** 42% of consumers around the world believe global brands produce better products than local ones. This sentiment is even stronger in Asian markets with significant untapped potential for luxury like India (63%), Thailand (60%) and Vietnam (59%). China is an exception, where only 40% of consumers think global brands offer superior products. This is likely due to the growing strength of local brands, which blend traditional Chinese culture, heritage and aesthetics with modern design to boost national pride and compete with international labels. Examples of this 'Guochao' trend include Li Ning and Anta in fashion, and Huawei and Xiaomi in tech.

Implications for Luxury

This confirms that the 'brand premium' is resilient. In most emerging markets, Western luxury brands are still viewed as the gold standard for quality, insulating them somewhat from local competition. However, our data suggests that in mature markets (like Europe), consumers are more skeptical of the 'global is better' narrative. Therefore, in Asia, luxury brands should double down on their global heritage and quality credentials, whereas in the West they may need to focus more on values and personal alignment.

This also leads to the equally important need for relevance in different socio-cultural contexts. Luxury brands must keep their narrative locally relevant while globally consistent.

56%

of global consumers are **willing to spend extra** for a brand with an image that appeals to them.

Trend 2: The 'Carpe Diem' Consumer

Global volatility has triggered a psychological shift toward immediate gratification. The uncertainty of the future is driving a 'live for the moment' spending philosophy, where consumers may prioritize immediate pleasure over long-term savings.

The Data

- 66% of global adults agree with the statement "I live for today because the future is uncertain".
- This 'YOLO' (You Only Live Once) sentiment is overwhelming in key Asian markets (Thailand, 89%; Hong Kong, 87%; China, 82%) but also prevalent in some mature Western markets (France, 76%; the US, 66%).

Implications for Luxury

This trend is the psychological engine behind 'revenge spending' and the resilience of the experience economy. Luxury brands are no longer just selling assets; they are selling dopamine. Marketing should not focus only on 'investment pieces' (buy now, keep forever) but also leverage 'emotional anchors' (buy now, feel better). It justifies a shift toward hedonistic categories (travel, dining) that offer not only an immediate mood lift but also create long-lasting emotions – 69% of luxury consumers in the US agree that "luxury helps create memories of unforgettable experiences"[2].

While this clearly endorses the growing importance of experiences, it is also worth remembering that the purchase of a luxury item is an experience itself. Luxury brands must ensure the entire purchase journey, from searching about the product to unpacking, reflects the luxury nature of the brand and creates positive, long-lasting memories.

Yet, to truly capture the 'Carpe Diem' consumer, brands must look beyond mere hedonism toward self-actualization. A true luxury experience does more than gratify or entertain; it elevates. Whether in travel, hospitality or retail, the most resonant experiences today are those that foster a growth mindset, offering the customer a moment of self-discovery or the opportunity to learn something new. In this context, luxury becomes a vehicle for personal perfection and opening the mind. As the experience economy matures, our data confirms this shift: 63% of people globally agree they are prepared to pay for a better experience[1], prioritizing moments of elevation over the accumulation of goods.

Every touchpoint – from the brand's WeChat microsite to its flagship boutique, from the online booking to the check-out at the front desk – must work seamlessly together to create such memorable experiences.

> *A luxury experience elevates you. This '**elevating**' aspect of the experience is not easy to achieve; **it is rare**.*

Felicitas Morhand,
Professor of Marketing,
University of Lausanne[3]

Trend 3: Materialism as Social Scorecard

Despite Western narratives around 'quiet luxury' or minimalism, our data reveals that for the majority of the world's growth markets, possessions remain an important yardstick for success.

The Data

- 46% of global consumers agree with the statement "I measure my success by the things I own".
- This is not a fringe view in Asia; it is the majority: Vietnam (83%), China (83%), Malaysia (74%) and Thailand (73%) top the global list. By contrast, only 20% in Denmark, Sweden and the Netherlands agree.

Implications for Luxury

There is a distinct East-West divide. In APAC, conspicuous consumption is not vulgar; it is a necessary validation of hard work and social mobility as well as a source of self-confidence – 85% of Chinese luxury consumers claim "luxury gives them confidence in who they are"[2]. Luxury brands should be unapologetic about logos and status in these markets. The strategy here should involve being appropriately visible, reinforcing the social signaling power of the product (or 'creation').

In Europe, however, luxury is not necessarily intended to have such a visible validation factor. Instead, 'quiet luxury' represents a departure from the overt and logo-driven branding. This attitude prioritizes impeccable craftsmanship, the finest materials, and timeless design, creating an aura of exclusivity that is communicated through quality rather than overt branding.

The US is a place to watch, as a polarization of attitudes may well be underway, social validation and 'quiet luxury' coexisting as different consumers buy luxury to fulfill different needs.

Trend 4: The Heritage Haven

In a world that feels like it is moving too fast, consumers are retreating to the familiar. They crave the safety of the past and established authority, favouring brands that have stood the test of time.

The Data

- 83% of adult consumers globally feel the world is changing too fast and 61% wish their country was 'the way it used to be'.
- Crucially for product launches, 77% say "I am more likely to trust a new product if it's made by a brand I already know".
- Even Gen Z show an interest in heritage: 51% of affluent Gen Z around the world buy luxury items with a view to passing them down to the next generation[4].

77%

say "I am more likely to **trust a new product** if it's made by a brand I already know".

Implications for Luxury

This is a massive barrier to entry for new disruptors and a moat for established Maisons. Consumers are risk averse; they want innovation but packaged in a familiar box. For luxury strategy, this means new collections should be heavily anchored in archival codes. Innovation should be presented as an evolution of heritage, not a revolution against it.

For heritage luxury brands, this creates an opportunity to become 'safe heavens' in what many see as a rapidly changing world.

Trend 5: Digital Duality

There is a deep conflict regarding technology. Consumers acknowledge its benefits but fear its dominance over their lives. They want the convenience of AI but crave the soul of human interaction.

The Data

- 58% of consumers globally agree "Artificial Intelligence is having a positive impact on the world".
- Simultaneously, 56% "fear that technical progress is destroying our lives".

> *The way to integrate* ***technology*** *into our guest experience at the hotel is to use it as an* ***enabler*** *for our staff and a* ***choice*** *for our guests. Does the guest want to use the technology to interact with us or does the guest prefer to have direct human interaction?*

Robert Hare,
General Manager,
Beau Rivage Geneva Hotel[3]

Implications for Luxury

This tension creates a clear role for luxury: to be the guardian of the human. While mass-market brands race to automate customer service, luxury should use tech only in the background (supply chain, personalization algorithms) while doubling down on human-to-human interaction in the foreground.

Crucially, the integration of technology must be positioned as a choice for the customer, not a mandate for efficiency. True luxury recognizes that every customer has a different relationship with time. Some seek the efficiency of a seamless, digital check-in; others require a 10-minute conversation with the staff at the front desk to alleviate loneliness. Technology should function as an enabler that allows staff to intuit these needs, not a script that overrides them. While an algorithm can predict what a person prefers based on data, only a human can sense what a person feels in the moment. The authenticity of this connection – the intuition to go 'off-script' – cannot be automated. 'High touch' becomes more valuable as the world becomes 'high tech'.

Importantly, when tech is visible (e.g., apps, websites), luxury brands must ensure their digital assets create luxury experiences aligned with what consumers expect to get at a boutique, a five-star hotel or a luxury spa. All touchpoints must work together to create an aspirational ecosystem that delivers a consistent, branded luxury experience.

Trend 6: The Sustainability Expectation Gap

Consumers are concerned about climate change but have absolved themselves of further responsibility. They believe they are doing enough and are essentially 'outsourcing' the remaining work to corporations.

The Data

- 78% believe we are heading for an environmental disaster unless habits change quickly.
- At the same time, 71% claim "I'm already doing all that I can to save the environment".

Implications for Luxury

This gap indicates that consumers are unlikely to sacrifice convenience or prestige or pay a distinct 'green premium' because they feel they have already 'paid' their dues by doing all they can. Luxury brands must embed sustainability as a baseline operational standard – a hygiene factor – rather than a marketing differentiator. The consumer expectation is: "I pay you a premium price; you fix the supply chain for me".

78%

believe we are heading for an **environmental disaster** unless habits change quickly.

Trend 7: The Longevity Economy

Health is ascending to become the ultimate luxury asset. As optimism about life expectancy grows, especially in Asia, wellness is moving from simple fitness to a focus on extending the human lifespan and providing mental peace.

The Data

- 38% of global consumers expect to live to be 100 years old.
- Optimism is significantly higher in emerging luxury markets like Vietnam (77%) and China (76%), which top the global list.

Implications for Luxury

The luxury sector must expand its definition of wellbeing. It is no longer just about spas; it is about longevity science, nutrition and recovery. Health is wealth! This opens strategic partnerships between luxury houses and medical/ wellness clinics.

This holistic approach also acknowledges that many consumers are seeking a spiritual experience, even if they do not label it as such. The drive for longevity is deeply coupled with a need to decompress. When consumers visit wellness retreats to reduce stress, the successful outcome is often a form of spiritual elevation or 'taking time to indulge oneself' – which is, in itself, luxury. Brands must therefore curate environments that foster mental peace as rigorously as they formulate products for physical vitality.

For fashion and beauty, this trend means shifting the narrative from 'anti-aging' (aesthetic) to 'longevity' (cellular health and vitality).

3. THE STRATEGIC TRIAD: THREE MACRO-THEMES REDEFINING VALUE IN LUXURY

The seven trends outlined above can be distilled into three macro-themes that are shaping the way consumers perceive and consume luxury.

Macro-Theme 1: The Rush for Significance

Underpinning Trends

- **The 'Carpe Diem' Consumer:** Living for the moment due to uncertainty.
- **Materialism as Social Scorecard:** Success defined by ownership.

Global Perspective

Fatigue and uncertainty are accelerating a shift from accumulation to gratification. The traditional 'save for a rainy day' mentality has eroded in favour of 'spending for a sunny today'. In mature Western markets, this manifests as a crave for 'quiet' indulgence and fleeting experiences.

Zoom into Asia-Pacific

In APAC, this urgency is louder and unapologetically material. 'Living for today' is the dominant philosophy, but unlike the West, success here must be visible. It is not enough to experience the moment; one must own it. In these markets, materialism is not a vice but the primary metric of social validation.

Implications for Luxury Brands in APAC

- **Validate the Splurge:** Do not shy away from the 'trophy' aspect of luxury. Marketing in this region should validate the purchase as a hard-earned reward. 'Quiet luxury' messaging may miss the mark in mass communications here; consumers want their success to be visible.
- **Create 'Urgent' Exclusivity:** Since consumers are in a 'live for the moment' mindset, limit-edition and 'once-in-a-lifetime' VIP experiences will be highly effective. Capitalize on the 'FOMO' (Fear Of Missing Out) to drive immediate conversion.

Macro-Theme 2: The Anchor of Authority

Underpinning Trends

- **The Supremacy of Global Brand Equity:** Preference for global brands and willingness to pay for image.
- **The Heritage Haven:** Trust in established brands and the past.
- **The Sustainability Expectation Gap:** Expecting brands to handle the environmental burden.

Global Perspective

In a volatile world, consumers are risk-averse and retreating to the safety of the known. Heritage brands now function as safety nets, where size and history serve as proxies for stability. Innovation is welcomed, provided it is packaged in the reassuring codes of the past.

Zoom into Asia-Pacific

This reverence for 'global authority' is the primary value driver in APAC. Here, Western luxury brands are still viewed as the gold standard for quality, insulating them from local competition. Furthermore, the 'Sustainability Gap' reinforces this: consumers expect these global giants to absorb the ethical burden, assuming a premium price tag guarantees a guilt-free supply chain.

Implications for Luxury Brands in APAC

- **Amplify European/ Global Codes:** When localising content, do not dilute the foreignness of the brand end ensure it translates into a locally relevant narrative. The 'global' status is a primary value driver. Ensure the brand's provenance (e.g., 'Made in France/ Italy') is front and center.
- **Heritage as Innovation:** When launching new product lines, explicitly tie them to the brand's archives. The APAC consumer needs to know that the new product carries the same weight and investment value as the classics. In China, 87% of luxury consumers prefer luxury brands that "value exceptional craftsmanship and the Metiers d'art"[2].
- **Silent Sustainability:** Don't make the customer work for sustainability. Communicate it as a built-in standard of excellence ("The best leather in the world is naturally sustainable"), rather than a moral choice that requires sacrifice.

84%

of luxury consumers want "**iconic and timeless pieces that never go out of style**".

Macro-Theme 3: The Quest for Human Centricity

Underpinning Trends

- **Digital Duality:** Optimism for AI tempered by fear of losing the human touch.
- **The Longevity Economy:** Health as a status symbol and the expectation of a longer life.

Global Perspective

The world is caught in a tug-of-war between the convenience of AI and the fear of human obsolescence. As technology becomes ubiquitous, the 'human touch' becomes the ultimate rarity. Simultaneously, health has moved from a chore to a luxury asset, with consumers seeking not just wellness but biological longevity and inner peace.

Zoom into Asia-Pacific

The region represents a unique paradox: it holds the world's highest optimism for AI, yet the deepest anxiety about its impact. This techno-anxiety fuels a massive drive for control over one's biology. In China and Vietnam, where optimism for hitting the 100-year mark is highest, longevity is not just a health goal; it is the new wealth.

Implications for Luxury Brands in APAC

- **The Ritual of Connection:** In an age of AI, the human connection remains the only non-replicable asset. Success requires moving from a transactional mindset to a relational one. A prime example is the 'Arabic Ritual' observed in high-end hospitality and retail: the interaction begins not with the product, but with sharing tea and getting to know one another. If this connection is genuine, the sale is a natural by-product.

  Furthermore, luxury implies a promise of perfection. Whether entering a palace hotel or a boutique, the client expects a flawless environment where they feel instantly 'at home'. Surprising a client who can afford everything is the industry's hardest challenge; it can only be achieved by empowering employees to use their sensitivity to deliver unscripted, hyper-personalized moments of care. Use AI to empower staff, not to replace them.
- **The 'Wellness' Pivot:** Luxury fashion and beauty brands should pivot their narrative toward 'longevity'. Partner with medical spas or incorporate bio-hacking language into skincare marketing. In Asia, 'health is the new wealth', and products that promise vitality will command the highest premiums.

> *The **human touch** is super important when it comes to emotions [..]. At the end of the day, the key to delivering a luxury experience is our employees. Their sensitivity, the connection they establish with our guests.*

Helen Bywater-Smith,
Global Head of the Customer Experience
Advisory Practice at Ipsos

4. CONCLUSION AND FOOD FOR THOUGHT

The Way Forward: Mastering the Balancing Act

The era of a one-size-fits-all global luxury strategy is fading. The winners will be the luxury brands that can successfully manage the contradictions of the modern consumer.

Luxury brands must be capable of signaling 'global authority' to satisfy the status-hungry markets of emerging Asia while, simultaneously, projecting 'intimate values' to engage the skeptical consumers of Europe. They must offer the dopamine hit of immediate pleasure while proving their enduring timelessness and investment value through archival heritage.

Ultimately, technology and sustainability are no longer differentiators – they are hygiene factors. The true differentiator in luxury remains the ability to humanize the experience in a digitised world, deliver a branded experience consistently across touchpoints, and offer 'longevity' in a world obsessed with the moment.

Strategic Questions: Food for Thought

As you refine your strategy, we encourage your leadership teams to answer these five questions:

- **The Authority Audit: Are we acting as a 'safe haven'?** In a volatile world where 77% of consumers trust known brands more than new ones, are we innovating too far away from our core codes? Does our newness feel like an evolution of our heritage or a risky revolution?
- **The Dopamine Test: Are we selling items or emotions?** With the 'Carpe Diem' consumer driving the experience economy, does our customer journey deliver an immediate emotional lift? How are we engineering unforgettable memories into the unboxing of a physical product?
- **The Regional Reality Check: Is our 'quiet luxury' too quiet for Asia?** Our data shows that in APAC visibility validates success. Are we apologizing for our logos in markets where they are actually a source of consumer self-confidence?
- **The Sustainability Gap: Are we asking the customer to do the work?** Consumers believe they have already paid their dues. Are we marketing sustainability as a 'moral choice' they must make, or have we embedded it as an invisible standard of excellence that justifies our price premium?
- **The Authenticity Audit: Are we enabling intuition or enforcing protocols?** Authenticity and storytelling have kept luxury brands relevant for decades, and these rely entirely on human connection. Are we using technology to strictly script our employees, or are we using it to free up their time? True luxury allows staff to go 'off the script' to capture the magic moment. Ask yourself: Does your customer journey allow for the intuition required to surprise a customer who has seen it all?

Luxury brands have historically placed their services or products at the centre. In a world marked by paradox, putting consumers, their needs and wants at the centre of what luxury brands do is key to sustained success.

[1] *Ipsos Global Trends 2025* are based on a survey conducted among over 38,000 adults across 43 countries and jurisdictions. The sample is intended to represent general consumers in each market, the trends identified shaping attitudes and behaviours across categories, including luxury.

[2] *Ipsos's Luxury Resonance Research*, conducted in September 2025 among a sample of 1,500 luxury consumers representing the top 30% of income earners in China, France and the US.

[3] *The Luxury Edit*, a three-part miniseries podcast by Helen Bywater-Smith, Global Head of the Customer Experience Advisory Practice at Ipsos.

[4] *Ipsos Global Influentials 2025*, which captures data from over 90,000 adults in the top 20% of income across 43 markets.